



# The Canadian Security Landscape in 2020

The impact of COVID on alarm activity and responses

# Introduction



These days, you would be hard-pressed to find a successful alarm company that doesn't believe in the importance of collecting and analyzing data.

This report provides a high-level overview of mobile response activity within the Canadian security industry in 2020. It provides data-driven insight to understand the key questions: who, what, where, when, and why.

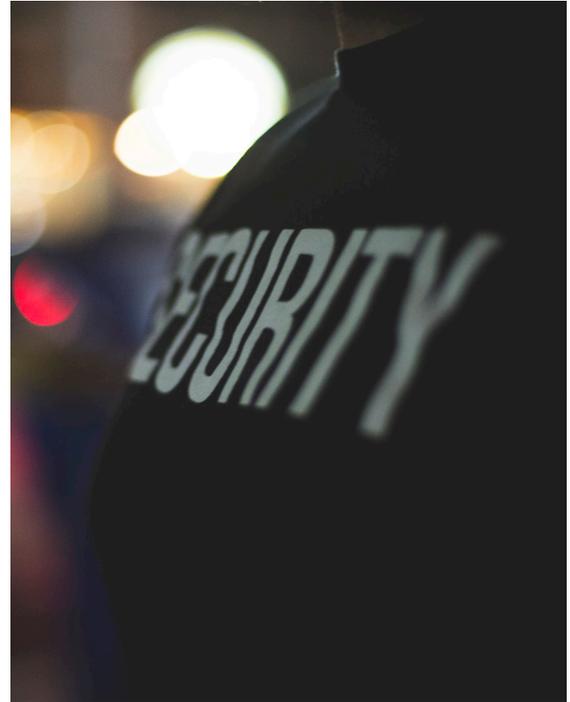
The data comes from residential or multi-dwelling units, small and medium-sized businesses, and commercial accounts.

While the intrusion market has experienced strong growth in recent years, COVID had a noticeable impact on the industry as companies had to pivot to a remote worker model.

The one constant is that alarm systems continued to send signals to monitoring stations, and customers still expected a response.

Whether you're a monitoring station or a security alarm dealer, this report will help you better understand your customers, and the alarms triggered.

Think of it as a guide into the "last mile" service and how you can provide stickier solutions for your customers.



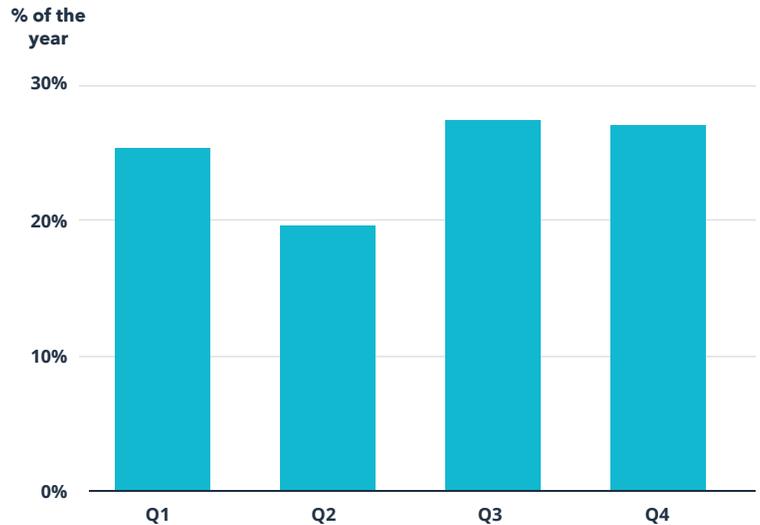
## 01

## 2020 Dispatch volume by quarter

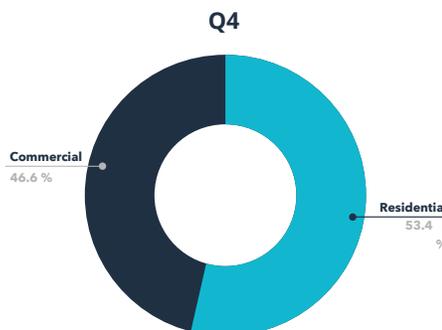
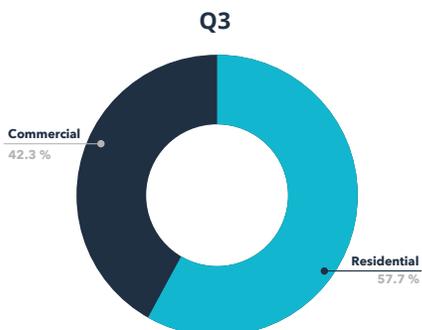
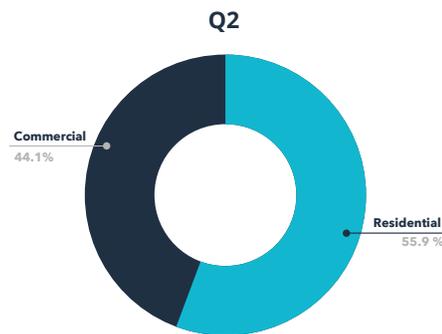
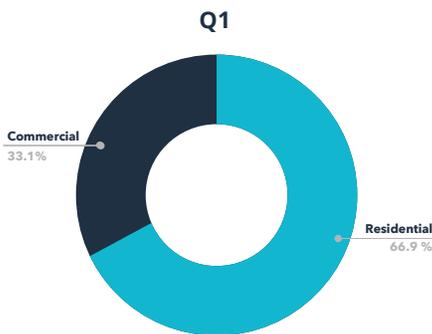
In 2020, the global pandemic dramatically changed the world and how the security industry operates and does business.

Many consumers worked remotely from home, and businesses closed during the lockdown. It resulted in a markedly lower number of dispatches in the second quarter.

Once the initial lockdown ended, there was a spike in the number of dispatches in the third and fourth quarters.



## 02



## Dispatches by customer segment

The data collected around dispatches by customer segmentation showed a continual increase in the alarm responses to SMB and commercial customers, aligned with the lockdown data.

As more people worked from home, their businesses were left unmanned. Intruders shifted from residential break-ins to commercial establishments. From the first quarter to the fourth quarter, the percentage of commercial dispatches climbed to 46.6% from 33.1%

Alarm companies responded by providing more security and video surveillance equipment to help commercial customers monitor their shuttered businesses.

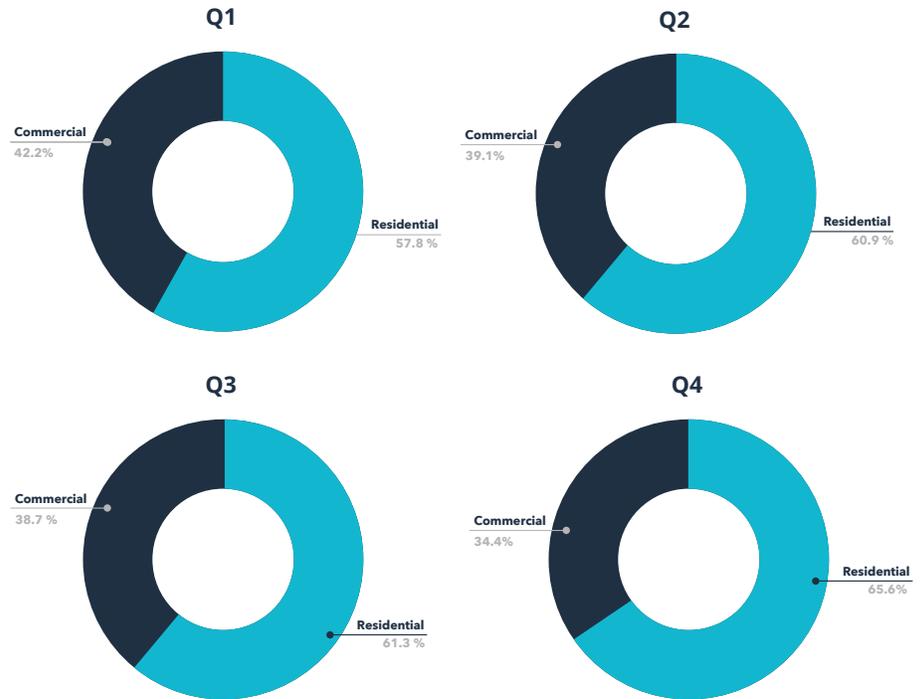
## 03

## Dispatches by customer segmentation 2019 vs. 2020

Before the global pandemic impacted the alarm response industry, the dispatch numbers by customer segmentation remained constant.

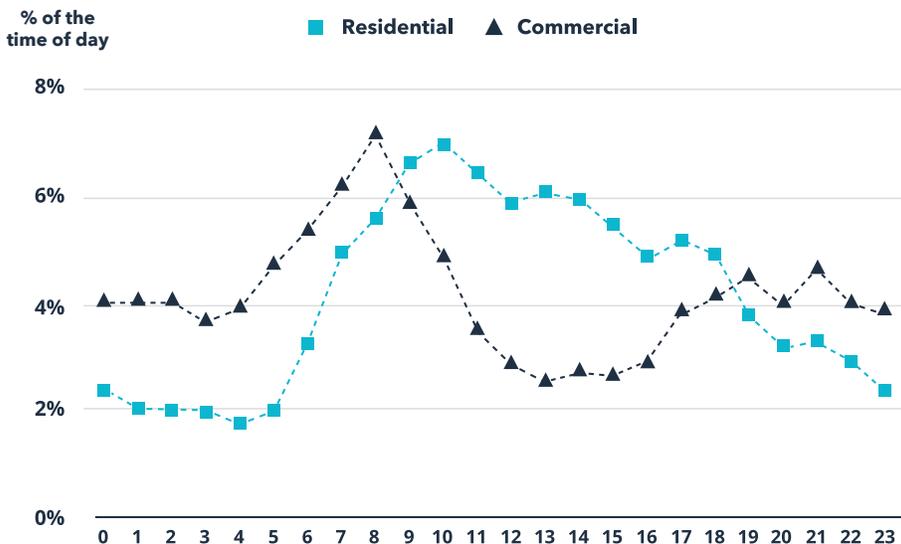
Most alarm responses involved residential customers. The split between residential and commercial customers was approximately 61%/39%.

In 2020, the breakdown changed to 58%/42%.



## 04

## Dispatch volume by time of day



There was a significant difference in behavior between residential and commercial customers.

Commercial and business customers were more likely to have alarms triggered during opening and closing times (peaks at 7 a.m. and 7 p.m.), mainly caused by human errors.

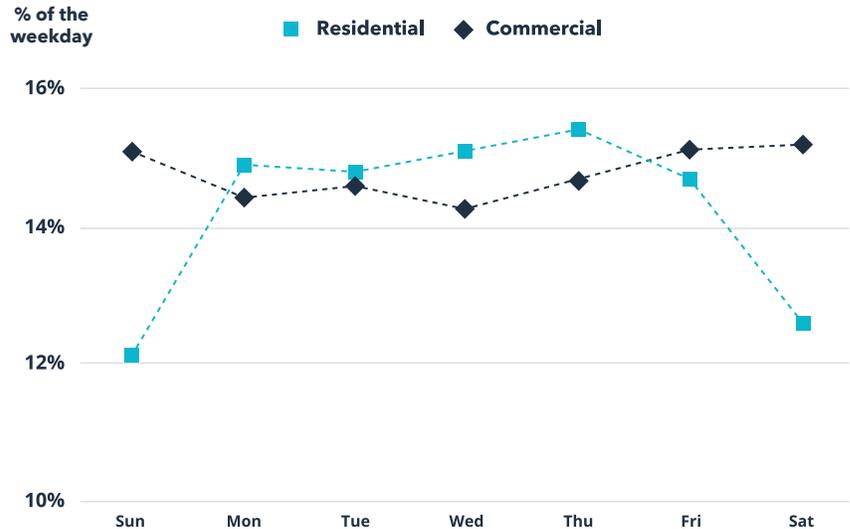
However, on the residential side, alarms were triggered in the morning (peaking at 10 a.m.) when people left for work or school and in the early afternoon as they returned home.

## 05

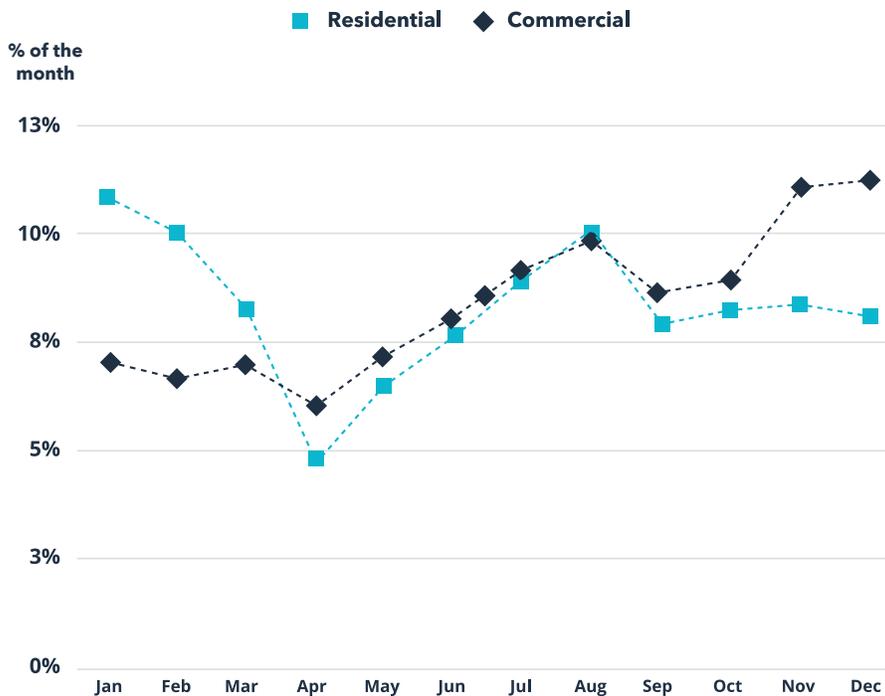
## Dispatch volume by day of the week

When analyzing dispatch volumes by days of the week, it was interesting to see a spike among residential during the weekdays while dispatches for commercial customers were more evenly distributed throughout the week.

The higher volume during the week for residential customers is likely due to system owners being out of the house and children going to school.



## 06



## Dispatch volume by month

Unlike many other industries, seasonality is not a significant factor in the dispatch rate across residential and commercial customers. However, the pandemic had a considerable impact on both customer segments.

Residential customers were working from home, and commercial customers closed down their offices or businesses. This was reflected in April when there was a dramatic decrease in dispatches. As the summer months approached and businesses began to reopen, there was a gradual increase to average volumes. We did, however, see another dip in September due to the pandemic's second wave.

## 07

## Share of new accounts by month

According to Parks Associates, the professionally monitored industry experienced a 5% subscriber growth increase from 2018 to 2019 in North America. Alarm adoption in the first half of 2020 largely preserved those gains, a tremendous win in light of the volatile economic landscape.

Although residential adoption of home security systems has significantly increased over the past five years, there was a noticeable increase in new commercial customers that enrolled in our platform last April and again in September and October during the second wave. This aligns with the dispatches by customer segment; there were more commercial dispatches during the lockdown months.



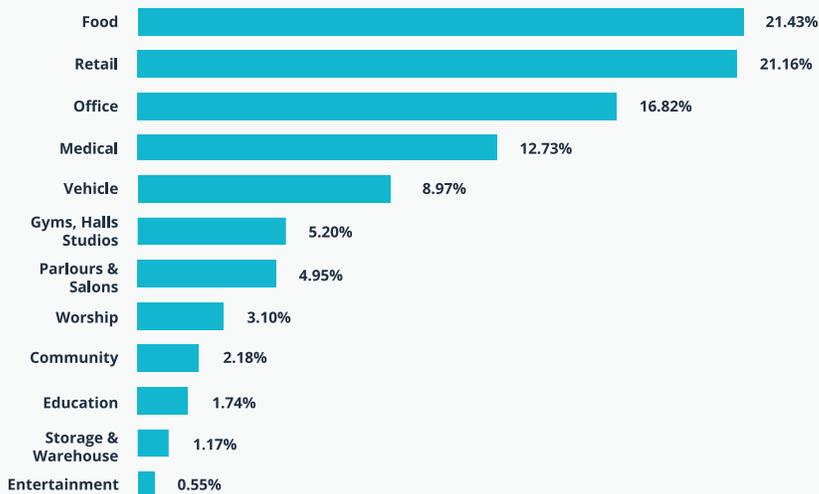
## 08

## Commercial dispatches by segment type

As expected, food, retail, and commercial offices accounted for most of the dispatch volume, which aligns with the fact that these businesses represent most commercial sites. Food was the number one dispatch source (21.4%), followed by retail (21.2%).

The two other industries that made up more than 20% of the dispatches are medical (12.8%) and auto dealerships (9%). Medical locations (pharmacies and offices) were a higher target during the pandemic because pharmaceuticals were on site.

Meanwhile, auto dealerships had a heavy inventory of high-value vehicles, tires, and other parts in open spaces that were attractive to thieves. Overall, 80% of the dispatches involved five commercial segments.

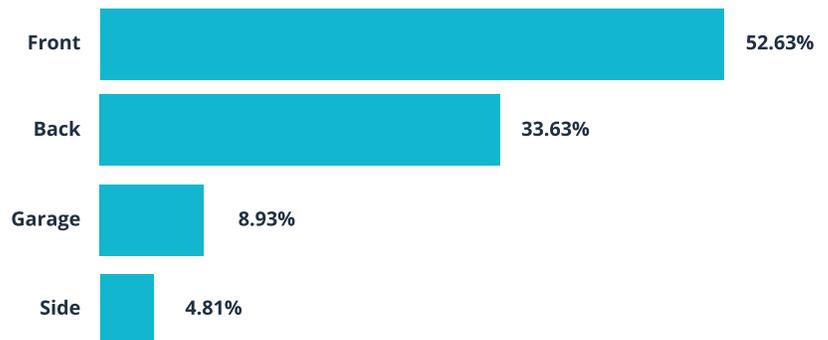


## 09

## Share of alarm triggered events by source

In 2020, over half the alarms (52.6%) handled by the RSPNDR guard network were triggered by the front entrance. This is not surprising, given it is the main access point. Back doors were another primary source of alarms, while garage and side entrances combined for less than 15%.

This data is not surprising because more than 98% of the alarms triggered are false and usually caused by human error when entering or exiting the premises.

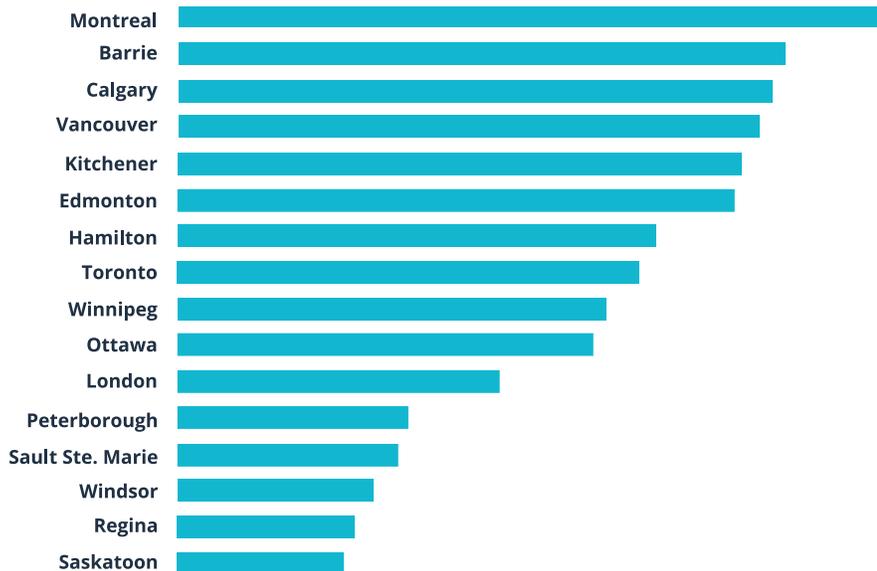


## 10

## Average drive times by cities

Not surprisingly, smaller cities have shorter drive times because there is less traffic than larger cities. Montreal's drive times were the highest, primarily due to its location as an island and the city's many construction sites.

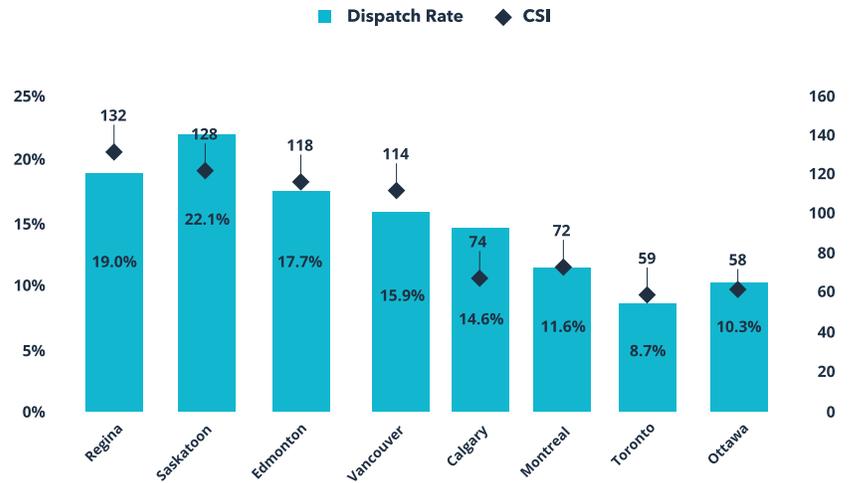
Although Barrie is not a large city, it had the second-highest drive times due to its large geographic footprint.



## 11

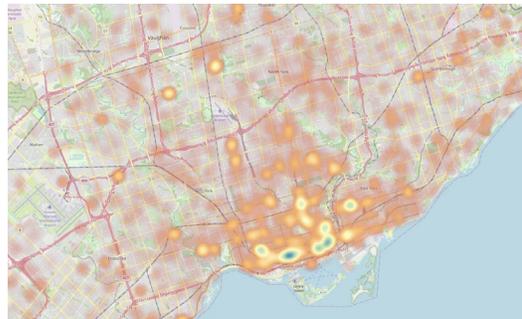
## Dispatch rate vs. crime rate severity index (CSI)

Normalizing for clients nationwide, our data shows the dispatch rates in larger cities track reasonably closely with the CSI.

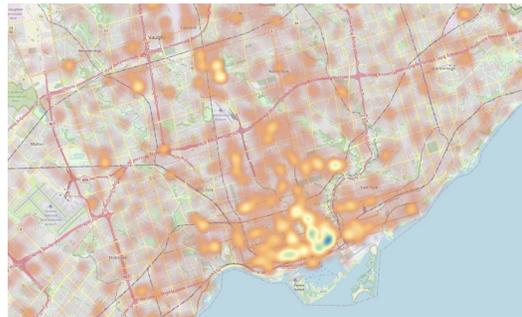


## 12

### Toronto 2019



### Toronto 2020



## Shift in dispatch locations

Compared with 2019, there was an increase last year in the number of dispatches in city centers and industrial/commercial areas. It reflects the rise in dispatch rates in the business and commercial segments since many companies operate in city centers versus the suburbs.

Last year, the many lockdowns due to the pandemic forced businesses to close, leaving them vulnerable to break-ins. In the residential market, fewer alarms were triggered because students took virtual classes and parents worked from home.

## Summary



2020 was an up-and-down year for the security industry. Amid the global pandemic, there was changing consumer and business behavior and a volatile economic landscape.

While the data delivers valuable insights, a key theme is the importance of professionally monitored systems that provide consumers and businesses with security and peace of mind. While it is difficult to predict the future, there is little doubt that the security business will continue to evolve and serve consumers in new and different ways.

Technology will play an increasingly important role as dealers and monitoring stations continue to find value-added services for their clients. New and innovative technology will drive productivity, better service, transparency, accountability, and financial gains.



## About RSPNDR

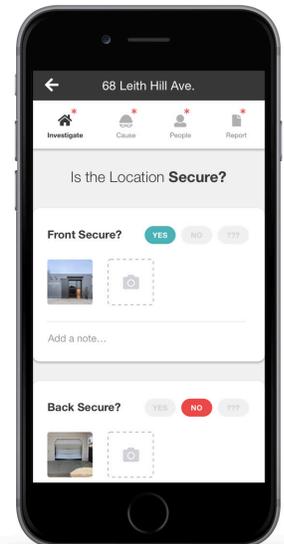
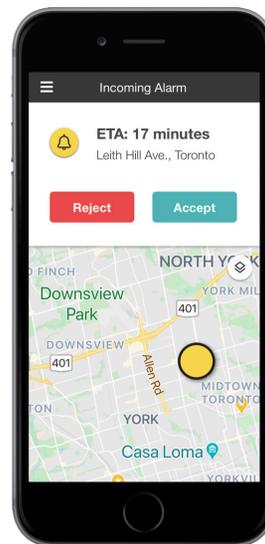


When an alarm is triggered, RSPNDR allows alarm companies to deliver dramatically faster response times. We're in the business of helping alarm companies provide high-quality response services to customers when they are really needed.

Our software platform delivers end-to-end automation of key processes, saving alarm companies time and making guards and monitoring personnel more profitable, cost-effective, and productive.

RSPNDR connects monitoring stations to a fast-growing, on-demand network of licensed mobile guards who quickly respond to alarms based on who is closest to the incident location.

We provide alarm companies with operational transparency and guard accountability that never existed before.



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For more information about how you can deliver a revolutionary alarm response service, connect with me at [frank@rspndr.io](mailto:frank@rspndr.io)

## About the author



Frank Pietrobono is VP of Sales and Business Development with RSPNDR. He was the president of CANASA and has participated in many industry committees with TMA and SIA in North America.

Frank is a seasoned sales leader with extensive experience in the monitoring and alarm dealer segments.

His strong background in strategic planning and analyzing market trends has allowed him to help dealers and monitoring stations globally create additional revenue stream by selling guards as a managed service.



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**DISCLAIMER:**

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