The security sector in perspective

A Security Research Initiative Report

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with

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CONFIDENTIAL

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Section 1. Executive Summary

Introduction

- There is relatively little research on what the key players in the security sector think about their industry and the context within which it operates.
- This study provides an insight into how security managers/directors and operatives working within the industry and their clients, those who manage and buy security for their companies, feel about some current key security practices.
- The lack of any comprehensive or dedicated databases mean that the samples may not be entirely representative. However, it is clear that private security is very much the province of white males. In each sample, most respondents were male and white. They also tended to be aged 35-54.
- The three samples were each asked a series of questions, some of which were unique, others that were common to two or three of the groups.

The clients

- Security specialists saw theft and fraud, cybercrime and organised crime as the main security threats confronting their organisations.
- Over half of clients (53.1%) agreed that, 'private security adds value to our business,' and few disagreed.
- Over two fifths conceded that, security was 'a grudge purchase'.
- While they were generally positive about the services they use, they discriminated between different parts of the industry, and in-house services were consistently preferred to contract services for quality, while contract services were seen by more respondents as offering better value for money.
- More negatively, security installers and guarding companies were not viewed as experts and did not typically exceed expectations.
- Although clients determine the conditions under which the guarding companies they use operate, and they felt they were trustworthy, they felt the margins they operated on were low and were critical of pay rates for guards and quality of management.
- There is evidence that the status of security in organisations is lower than some other functions, including procurement and facilities management.
- Asked about the adequacy of the training received by the security staff they deployed, many were unsure. Excluding these, a majority felt that training was at least adequate. However, especially in the case of guards, considerably more considered that current requirements were less than required.
- Security specialists felt that training was particularly important where risky or conflict situations were involved.

- They were extremely ambivalent about how successful the SIA had been on three levels: in eliminating the criminal element from working in the industry; in ensuring that the legal requirements for working in the industry had been enforced; and in increasing public safety.
- Nevertheless, they were convinced of the need for regulation, indeed a large majority favoured regulation for four key sectors of the industry – manufacturing and installing security equipment, private/commercial detective work, and security consultancy.
- Security specialists also favoured the introduction of a 'hallmark' that recognised quality in addition to minimum standards and a scaled award scheme rather than one benchmark. Almost half thought that the introduction of a hallmark would increase public regard for licensed security companies.
- While only some stated that their company's security budget had been reduced in the previous 2 years, most accepted that security was low priority, and their assessment of future spending was relatively pessimistic.
- Nevertheless, they felt that some areas of security had gained at the expense of others. Most especially it was evident that the budget for contract security work had increased more than for in-house security and that there had been a shift in spending in the past two years from security guards to equipment, and they saw these trends as likely to continue.

The suppliers (directors and managers)

- Like security specialists, directors/managers held mixed views about the success of the SIA, although they were slightly more positive, especially those who had had more involvement with the SIA via a licence or the ACS scheme.
- Directors/managers agreed with clients about the need for further regulation in the four key sectors of the industry identified as not currently regulated.
- A large majority also favoured the introduction of a 'hallmark' that recognised quality in addition to the minimum standards required by business licensing, again favouring a scaled award scheme.
- Directors/managers were concerned about how security was perceived by buyers, with almost two thirds feeling that, 'low margins change the focus of contract security directors/managers from security to cost control', and about a half accepted that, 'Security is predominantly a grudge purchase.'
- Moreover, more than two thirds cited the need to cut costs as a reason for severing contracts or changing suppliers in their area of security.
- In general directors/managers felt that the training of security operatives was adequate, although many were unsure. However, they were most critical of training for guards and door supervisors.
- Directors/managers agreed with security specialists that training was particularly important where risky or conflict situations were involved but were equally unwilling to accept that the level of training required should be left to the licensed company for some tasks that did not involve public

contact. This may be a reflection of another finding that many respondents felt that the security sector was immature.

- Directors/managers felt that staff turnover in the industry was extremely high but were less likely to concede that it was a problem in their company.
- Asked why people left contract security work in their area of security, directors/managers saw three reasons as crucial: poor pay; limited opportunities for development; and a feeling among staff that they weren't appreciated.

Security operatives (security officers in house and contract, door supervisors and public space surveillance officers)

- Most (93.3%) worked full-time as security operatives, although 10.3% said they had at least one other job. On average they were rostered to work about 47 hours per week, but in fact worked about four hours more than this. Those who had additional jobs averaged nearly 20 hours per week on these.
- Like security specialists and directors/managers, security operatives were ambivalent about the success of the SIA.
- Most felt they were adequately trained for their security work.
- Just under a quarter thought that, for the area where they lived, the pay was above average, with a third considering their pay to be below average.
- They felt that staff turnover was high both in the security industry and, to a lesser extent, in their company. The differences here were less extreme than for directors/managers.
- Barely half thought they would be working in the security sector three years hence. Given their time in the industry at the time of the survey, this figure is particularly high.
- Operatives broadly ranked the reasons why people left security work in the same order as did directors/managers. However, they consistently cited more reasons than did directors/managers.
- The most notable difference was in the number who thought that operatives didn't feel appreciated. It was clear that security officers felt their efforts went unrecognised and unappreciated by both management and the wider public.

Security guards

- In 61.3% of cases the licensing fee was paid for by the employer
- 7.6% had one or more jobs in addition to their security work
- A quarter were rostered to work more than 54 hours per week. A quarter actually worked more than 60 hours per week
- Almost half of respondents said they also carried out non-security related functions
- 53.3% believed they would still be working in the sector in three years' time

- 24.3% of responding security guards believed their pay to be above average for the area in which they lived, 41.9% average, and 32.1% below average
- 53.9% disagreed or strongly disagreed with the assertion that the public has a positive view of most people who do security work
- 56.3% agreed or strongly agreed with the assertion that 'most of my colleagues are totally committed to providing a quality service'

Door supervisors

- 66.3% purchased their own licence
- 20.7% had one or more jobs in addition to their door work
- A quarter were rostered to work more than 48 hours per week. A quarter actually worked more than 60 hours per week
- Almost half (47.7%) of respondents said they also carried out non-security related functions
- 59% believed they would still be working in the sector in three years' time
- 20% of responding door supervisors believed their pay to be above average for the area in which they lived, 36.5% average, and 43.5% below average
- 52.3% agreed or strongly agreed with the assertion that 'most of my colleagues are totally committed to providing a quality service'

Public space surveillance operatives

- 61.2% stated their licensing fee was paid for by their employer
- 9.2% had one or more jobs in addition to their security work
- They worked an average of 49 hours per week. A quarter were rostered to work more than 48 hours per week. A quarter actually worked more than 56 hours per week.
- 53.2% believed they would still be working in the sector in three years' time
- 26.5% believed their pay to be above average for the area in which they lived, 39.8% average, and 32.5% below average
- 61.5% disagreed or strongly disagreed with the assertion that the public has a positive view of most people who do security work

Summary points

- A large majority of each sample agreed that the main aims of regulation included both developing minimum standards to which companies must operate and the need to keep people safe
- There was also widespread agreement that four aspects of the security industry not currently regulated – installers and manufacturers of security equipment, private/commercial detectives and security consultants – should be regulated
- There was considerable support for the principle of licensing and for the engagement of the private sector in it, albeit that some had reservations

about too much independent action or action not guided by a worthwhile enforcement/inspection regime

- Security directors/managers and operatives tended to agree on the main reasons for high turnover, citing in particular poor pay, lack of recognition, and limited opportunities for development
- Within organisations security management is facing a challenging time
- The security sector is not in a poor state, but there are key needs that must be addressed
- There needs to be a collaborative venture highlighting what you get from good security that you don't get from bad security, and showing, via examples, how you achieve this cost effectively

Section 2. The Private Security Sector in Perspective

2.1 Some writers have adopted a somewhat jaundiced view of private security, reminding us of the dangers of too much security, not least for civil liberties, and of the risks in relying on the private market for judgments about what level of security is appropriate because it has a vested interest in sales (Zedner, 2009), where profit is a bigger priority than public protection. One article has outlined why it can be considered a 'tainted trade' (Thumala et al, 2011) and commonly purchased as a 'grudge' (Goode et al, 2010). Certainly, the road to statutory regulation of some parts of the security sector was driven by concerns to eradicate criminal elements and low standards (George and Button, 2000; White 2010).

2.2 Alongside these, and a range of other concerns (see, Zender, 2009) there are now a number of trends suggesting a heightened interest in the private security sector; these have encouraged the research discussed later in this report.

2.3 First, the heightened terror alert that characterises modern times has generated a commitment to ensuring that locales are adequately protected against terrorist attacks, and especially places that are defined as of national interest or otherwise of high risk. This has supported a growing awareness of the role private enterprise (and therefore the security it buys) plays in relation to protecting the national infrastructure (see Hess, 2009; Moteff and Parfomak, 2004).

2.4 A second related issue concerns the growing array of evidence that private security, and in this context it means security measures adopted by individuals to protect themselves and their property and assets, has worked (Farrell et al, 2008; 2010a; 2010b). Indeed, there is now a body of evidence that suggests private security of this type may be a key component of explanations for the crime drop witnessed by most countries in the western world for a range of crimes since the mid 1990s (van Dijk et al, 2012).[1]

2.5 Indeed, while there is generally perceived to be skepticism about private patrols of the street – the traditional terrain of the police officer –the evidence on public perceptions would suggest it was at worst mixed (see, Nalla and Heraux, 3003; Nalla and Lim, 2003; van Senden and Nalla, 2010, see also Noaks, 2008). Indeed, even police officers may rank security personnel higher than they assume (see Nalla and Hummer, 1999).

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[1] It is not all good news unfortunately, it is clear that some groups are disadvantaged when it comes to having good security, and these groups are typically those who are disadvantaged for other reasons (Tilley et al, forthcoming).

2.6 Third, there are concerns about a crime wave, driven by the austere economic climate. Although links between crime increases and recessions must be discussed cautiously (see for example Gill, 2011), it is understandable that people and organisations should take account of the possibility of a greater threat from crime in more austere times, and the private security sector offers a range of solutions.

2.7 Similarly, the persistence of terrorist threats, the emergence of different forms of organised crime, the global threat of cyber crime, the growing awareness of the vast impact of financial crimes in their different forms, the dangers of the insider threat posed by dishonest staff sometimes acting in collusion, to name but a few, have caused organisations to rethink their approach to security. This does not mean that private security is used more often, organisations are under pressure too and it seems unlikely that spend on security will not come under scrutiny. But these developments are likely to draw attention to how security is managed and deployed.

2.8 This is linked to a fourth issue. It is recognised that a further pinch point that can lead to a greater spend on security is legislation (Collins et al, 2005). In the UK, The Corporate Manslaughter and Corporate Homicide Act 2007, and the Bribery and Corruption Act 2010 render senior directors personally accountable for corporate failure, and the need to reduce risks sometimes incurs costs.

2.9 These developments are linked to a fifth and perhaps more significant point in that in the UK at least, there are cut backs to a range of state services and this includes the police. The police service is having to look at alternative ways of policing and at engaging with a range of potential partners, including the private sector. This potentially opens up opportunities for private security in forging new and different/improved relations with the police.

2.10 In fact, as several studies have shown (e.g. Button, 2007; Crawford and Lister, 2004) police officers have always engaged with a variety of non police groups, and this includes the private sector. What is potentially different these days is that there is awareness and experience of different types of governance structures and the types of controls that can be implemented (see Hoogenboom, 2010; White, 2010). Moreover, there is an awareness that just as the police service is required to be businesslike in its approach, so the private security sector has adopted approaches that align more with public good sentiments, no doubt because it represents a business opportunity (White and Gill, forthcoming, but see Thumala et al, 2011).

2.11 In a different way time has offered an array of examples of the different ways in which the police and private security can work together (see, Button, 2008; Collins et al, 2005; Sarre and Prenzler, 2011) developing different forms of accountability for each. These various ‘governance nodes’ (see Hoogenboom, 2010) offer an opportunity to engage private security on terms that require behaviour that is aligned with the public good. For example, where the police directly engage private security contractors to carry out work.

Regulation and private security

2.12 Another major change has been the regulation of some parts of the private security sector. The Private Security Industry Act, 2001, created the Security Industry Authority (SIA) which came into existence in 2003, and requires every individual conducting security operations in regulated sectors to have a licence.[2] While not all senior police officers feel this has been sufficient to raise standards to a level that will make regulated individuals effective and appropriate partners for the police, few doubt that it has raised standards and has appeased some officers (Gill et al, 2010). This view appears to be reflected in the private security world too where those working in various security related roles reported a mixed view as to whether the SIA had met its aims (White and Smith, 2009).

2.13 The issue of regulation is an important one and in the case of private security has been the subject of much debate (see Button and George, 2006; White, 2010; White and Smith, 2009).

2.14 An internal Government document leaked to the BBC on 22nd September 2010 outlined plans to abolish the SIA as part of the so called ‘burning of the quangos’, but it was subject to a last minute reprieve. The security sector was clearly concerned that the progress it thought had been made under statutory regulation would be abolished, and had quickly formed ‘The Security Alliance’ to represent the industry. The Security Alliance proposed some key principles for a new regulatory regime as part of a detailed response handed to the government, now being considered for a consultation document. The principles were:

- Regulation – The regulatory function should continue to encompass the licensing of individuals, compliance and enforcement, and should be expanded to include business registration. Enforcement should be robust, targeted and intelligence led. A single system of regulation for the whole of the UK should be retained.

- Compliance – Existing external auditory systems (UKAS Accredited) which are industry specific should be part of the compliance system. A single individual training qualification should be the compliance indicator.

[2] There are two primary objectives of the SIA: to reduce criminality in the private security industry; and to raise standards in the private security industry.

- Governance - The security industry should be represented on the board of the regulator.

- Simplicity – Licenses categories should be reduced in number and simplified.

- Skills and Standards – Standards should be based upon nationally recognised competency standards and should embrace existing British Standards. Development of skills and standards is the role of industry.

- Competition – Regulation should not discourage competition or new entrants.

- Value for Money – All costs should be transparent, proportionate and lower than the current system. Alternative methods, including devolved licensing should be examined.

2.15 Similar ideas were voiced by Ruth Henig (2010), Chair of the SIA in a conference speech where she said:

> *I would like to see the SIA working with partner bodies and private security companies on the most effective way to plan for the transfer of the SIA's responsibilities for developing and maintaining competency standards and qualifications to the industry, while maintaining a role in approving these standards, and facilitating the establishment of an industry-led hallmark scheme to drive higher standards above the minimum requirements for compulsory business licensing. Further down the road I foresee the empowerment of compliant businesses to take on additional responsibilities for staff licensing and compliance management.*

2.16 The SIA subsequently supported the Government's proposal that recommended its own abolition, or at least suggested that it should be reconstituted as a non departmental public body, effectively distancing it from Home Office control, as part of a phased transition to a new regulatory regime.

2.17 The principles of the new regime were that the focus on licensing would move from the individual to the business, and with the business being licensed in certain and as yet unspecified areas of the security sector; it would be a criminal offence for these businesses to operate without a license; and the reconstituted SIA (still to be called the SIA), having approved a company's processes for licensing individuals, would permit it to register its own employees against national standards. They would then join a national register operated by the SIA. Those companies that do not have the desire, or otherwise do not want to take in this work themselves could look to newly created Mediated Access Providers to undertake the work for them. Because the business is licensed it means the regulator can be assured of minimum standards and so would not need the quality elements of an Approved Company Scheme. Instead, the functions it carries out would be taken over by what was widely referred to as a hallmark scheme, and operated by the industry. It is far from clear who precisely will run this scheme and the ways in which it will be a differentiator and attract the support of buyers. The responsibility for these areas in Scotland and Northern Ireland remain with the devolved administrations so may not apply in the same way there.

2.18 As noted, the proposals were not viewed as contentious and were largely welcomed by all parties; the regulator, the security sector and the Government. There are still a number of unanswered questions, not least around how much responsibility to deploy staff will be permitted, and also costs. Since the business is to be licensed the costs would, for the most part anyway, be borne by the business. But what these are to be, how they will be calculated and how they will be shared between individual and company remain unknown.

2.19 However positive the key stakeholders appear to be the reality is that many such changes require primary legislation, and at the time of writing it is far from clear that there will be time on the agenda to schedule what needs to be done. Certainly the impact assessment that was supposed to have been introduced by the Home Office in the Spring had not been published in early May 2012.

2.20 There is the possibility that the Home Office has lost the appetite for change, especially given the competing priorities for time on the legislative agenda. It is possible that the Government is delaying action until the Leveson enquiry has reported, since it seems likely, even inevitable, that it will recommend some type of licensing of private investigators. This delay then raises a whole host of possibilities.

2.21 Not having primary legislation has a number of consequences. It means the status of the SIA as a non departmental public body cannot be changed; it means the payment of fees structure cannot be altered; and there would be no new administrative sanctions (short of prosecution for non compliance) to deal with non compliant businesses. This would in effect undermine its ability to enforce effectively. Therefore at least two key issues that underpin the proposed licensing of business, those relating to fees and enforcement powers, will have been undermined.

2.22 Yet there are still ways in which businesses could be provided with additional responsibility for example, for the people they deploy. Legislation already exists for the SIA to license businesses, albeit it is general rather than specific. The Home Secretary could determine that the Approved Contractor Scheme will become a requirement, in which case it would need to be adjusted to incorporate additional tests of ‘fit and proper persons’ in addition to quality requirements. Similarly, the Home Secretary could increase the private security representation on the SIA Board.

2.23 Moreover, there are still many unanswered questions regarding the relationship between the licensed businesses and the regulator. For example, will those with exemplary records be able to negotiate longer periods between reviews/inspections? Or could they be allowed to conduct self reviews? Would there be greater freedoms over the deployment of staff or over who has to be licensed, perhaps just those who deal with the public in potentially conflict situations? And will training requirements be adjusted so that those who are most at risk, say in dealing with the potential for violence, undertake more training than those who are not?

2.24 The current situation then is somewhat confused. The general principles that received so much industry support and which the SIA has been promoting may not be able to be brought about in full by a lack of time for primary legislation, and perhaps by changing Home Office priorities. The proposal for business licensing may remain in place, and be achieved by the back door, indeed it seems likely this will happen, but it is pure speculation as to what this will look like. Fundamental questions on progress concern whether the SIA is capable of delivering change, whether the Home Office can find the time (and has the political will), and whether the industry is still sufficiently motivated and interested. In reality the acquiescence that has governed the proposals is misplaced, it seems there is a lot to fight for.

What is private security?

2.25 It will be evident from the discussion so far that the term ‘private security’ incorporates a wide array of activities. This includes the manufacture, sale, installation and maintenance of technical security measures that individuals may use to protect their homes and organisations to protect their premises (e.g. alarms, CCTV, fences, locks); it may include the activities carried out by organisations to protect themselves against threats - what are sometimes referred to as in-house or propriety security functions; it may include private security companies carrying out a wide range of activities from different types of security guarding, criminal investigations and security consulting. Indeed, the activities carried out by the private security sector are vast. As Button (2008;5) has argued:

> *Internationally there is no security function carried out in the state sector that is not undertaken in the private sector in some form.*

2.26 As has been noted elsewhere (Gill et al, 2010) there are a range of non state police groups that are engaged in different ways in ‘policing’. Button (2002) describes these as follows:

Centralised policing

- Central government organisations, funded by government revenue such as the Air Force, Marines, MI5, MI6, GCHQ, HM Revenue & Customs, Health and Safety Executive, Environment Agency, Serious Fraud Office, Office of Data Protection Commissioner and regulatory bodies e.g. General Dental Council, General Medical Council, Independent Television Commission

Decentralised policing

- Employed by local authorities, funded by government revenue, for example neighbourhood wardens, British Waterways, housing benefit investigators, environmental health officers, training standards officers, regulatory bodies (local authorities regulate dog breeders, taxis, sex shops and planning proposals)

Specialised police organisations

- Organisations with similar powers to the police such as Ministry of Defence Police, British Transport Police, United Kingdom Atomic Energy Authority Constabulary, Parks Police, Special Transport Police

Non private security private policing bodies

- Non private security private policing bodies such as the RSPCA, NSPCC, Federation against Software Theft, International Chamber of Commerce, Counterfeiting Intelligence Bureau, IMB Piracy Reporting Centre, high court under-sheriffs (power through warrant of court to seize goods)

Voluntary policing

- Policing undertaken in a voluntary capacity such as Neighbourhood Watch, special constabulary, media, public intervening or reporting crimes, vigilantism.

2.27 And there is another complication here that merits a comment. Within organisations security provides protection against a variety of threats, not just crime threats, including accidents, errors of judgment, and a broad range of unethical practices (Bottom and Kostanoski, 1983). Indeed, while security is seen to differ from safety in that the former is focused on dealing with intended threats and the latter unintended ones, in reality the initial response to each is often much the same and in some cases the duties are subsumed under one function or person.

2.28 Likewise, other types of response to incidents such as crisis management, or potential incidents such as contingency planning may be included as part of what the security sector does, or outside it, as a distinct field of expertise. And some areas which may be clearly categorized as 'security', and cyber crime is a case in point, draw upon a specific skill set and knowledge base which is outside of that of many of those in charge of security for organisations.

2.29 Consequently, some organisations have different individuals/functions in charge of security on the one hand, and safety, facilities, contingency planning, cyber crime on the other, but it is not unusual to find any combination of these within the remit of what is termed ‘security’.

2.30 The wide relevance of security as a topic is reflected in the fact that for all business activities security is likely at some point to be an issue, and all disciplines contribute to our understanding of security (Gill, 2006). The ASIS foundation has undertaken some work on the key elements of the study of security and identified 18 core elements (ASIS Foundation, 2009) which serve to highlight its vastness:

1. physical security,
2. personnel security,
3. information systems security,
4. investigations,
5. loss prevention,
6. risk management,
7. legal aspects,
8. emergency and contingency planning,
9. fire protection,
10. crisis management,
11. disaster management,
12. counterterrorism,
13. competitive intelligence,
14. executive protection,
15. violence in the workplace,
16. crime prevention,
17. crime prevention through environmental design (CPTED), and
18. security architecture and engineering.

2.31 The tendency, reflected in introductory texts on the subject, to see security as ‘the protection of assets’ or ‘protection against vulnerabilities’ or ‘selling protection for profit’ are catchy but inevitably simplistic. As has been shown, in this short discussion it covers a range of activities, and its boundaries are variously defined to meet the needs of the audience/group in question whether that be by the type of service/product, the market served, the type of regulatory structure in question or something else (George and Button, 2000). Any studies of private security need to define their remit (Jones and Newburn, 1998).

Studies of the private security sector

2.32 While there have been a range of studies of the extent and characteristics of business crimes, particularly where the business or organisation is a victim, only some of these include a discussion of the role of private security. Sometimes the aim is just to find out the nature and extent of crime against business, in other studies there is a specific attempt to determine the potential effectiveness of different solutions, and these can offer important insights.

2.33 There are two sectors that have received more attention than the others. The retail sector has been subject to a number of surveys (for a summary see, Bamfield 2012; Beck, 2010), and there are currently two annual surveys that cover the UK and include details about security: the Retail Crime Survey published by the British Retail Consortium (see, for example, BRC, 2011); and the Global Theft Barometer (see, for example, Bamfield, 2011). More focused studies in the retail sector have looked at specific types of security measures. Many of these are conducted in the US but often the findings have a broader significance. Some examples include, cash handling (Hayes, 2008), dealing with shoplifters (RILA, 2008), staff screening (RILA, 2008) and CCTV (Spriggs and Gill, 2006).

2.34 Participants in the finance sector also regularly conduct surveys, especially the big auditing companies, sometimes about financial crime generally (Ernst & Young, 2010), or specific types such as fraud and misconduct (KPMG 2010) and cyber crime (PWC, 2011), or in a specific region (Deloitte, 2011). They are clearly undertaken with a business development purpose in mind, and the methodologies are not always fully explained, and the results produced need to bear this in mind.

2.35 The most comprehensive insights into the private security world have been undertaken in the US and date back to the 1970s. Various studies have covered different aspects of private security provision. The work was spearheaded in the 1970s by the RAND Corporation that covered regulation issues as well as the work of the sector (see, Kakalik and Wildhorn, 1971a, 1971b, 1971c, 1971d). This was succeeded by comprehensive work in the 1980s from Hallcrest Systems (Cunningham, Taylor, & Hallcrest Systems, Inc., 1985; Cunningham, Strauchs, Van Meter, and Hallcrest Systems, Inc., 1990) which included the most extensive discussion of security trends to-date (see also, Nalla and Morash, 2002). Collectively these studies were important in shaping thinking about the security sector.

2.36 The private security sector has been subject to a fairly extensive critique from writers based in north America, not least Clifford Shearing and Phil Stenning (see for example, Freedman and Stenning, 1986; Shearing and Stenning, 1981; 1983; 1987, and see Rigatos, 2002 whose work is based in Canada), and in Australia (see especially, Prenzler, forthcoming; Prenzler et al, 2008; Sarre and Prenzler, 2009) and in Europe (for example, de Waard, 1999; van Steden and Sarre, 2010), but especially the UK (for example, Beck and Willis, 1995; Briggs and Edwards, 2006; Button 2007; 2008; Conference Board, 2005; Gill and Hart, 1997; Hoddinot, 1994; Johnston, 1992; Jones and Newburn, 1995; 1998; Loader, 2000; Loader and Walker, 2007; McGee, 2006; South, 1988; Wakefield, 2003) and there has been some work in other parts of the world for example Saudi Arabia (de Jong, 2002) and Singapore (Nalla and Hoffman, 1996). These and other studies besides have served to underline the crucial role the private sector plays in support of the broader aims of policing; which has fed into the importance of appropriate regulation; and raised concerns that it leads to injustices where some people can afford security and some can't.

2.37 In terms of recent large scale survey work of the security sector there have been two major studies one in the US and one in Australia.

2.38 The US study, undertaken under the umbrella and sponsorship of the ASIS Foundation (Collins et al, 2005), was inspired by a need to understand security in response to the September 11th attacks. It aimed to determine the size of various security sectors; assess changes in security, including expenditure on it since the September 11th attacks; and assess the relationships between security and other business units including outside agencies. The approach involved four surveys, three aimed at parts of the security sector and one at law enforcement.

2.39 Some of the key findings included: buying intentions were more focused on security equipment than security services and more on in-house security than contract security; the impact of September 11th (in particular) and legislative changes (to a lesser extent) drove expenditure on security upwards; the vast majority of security suppliers felt their revenues would increase, and only a minority of companies felt their budgets for security would decrease, most said they would either stay the same or increase; those in corporate security management had reached a higher level of education including having a degree than those working for security suppliers; the most common reason for law enforcement to engage with private security was over alarm response; nearly a half of private security companies had made some type of resource available to law enforcement and close to 4 in 10 had provided guard services; most respondents from companies and security suppliers were at least satisfied with their relationship with law enforcement.

2.40 The Australian study (Sarre and Prenzler, 2011) aimed to 'provide the first ever comprehensive study of the legal and regulatory issues, together with policy implications, of the development and growth of the private security industry in Australia over the past three decades' (p.5).

2.41 The authors found that private security was growing at a faster rate than the police and is now bigger; the police value partnerships with private security; security providers are striving for a greater professional standing; and despite a number of high profile scandals there is 'a high degree' of regulation across Australia, albeit that coverage is inconsistent and in some cases short of what is required; and the authors report the need for special protection for those who are responsible for security in highly volatile and dangerous situations (such as working with the public where some people may be intoxicated).

2.42 Interestingly the authors note that the move from more police officers to more security is driven by a number of trends which include concern about high crime levels and high fear of crime levels; the 'shift in consciousness away from reliance on police to a mentality of 'self protection''; a move to a 'user pays' approach; the 'devolution' of more traditional police roles to security companies; technological developments which have provided more options; pressure from insurance companies to provide more security; increased legal requirements regarding safety of staff and visitors; and greater knowledge about security measures.

Security personnel

2.43 Given the rather eclectic group that comprise the security sector it is perhaps not surprising that there is a wide mix of people working within it. The diverse range of activities undertaken under the umbrella of 'security' coupled with the lack of research in many areas means there are big information gaps. It has been noted that one of the best qualifications for work in the security sector is a pension from the police or military or some other form of law enforcement (Gill, 1996), frequently as a second career. As a consequence of this and the nature of the work, it is typically a male activity. Beyond these two trends much varies with type of activity and type of organisation and context in which work takes place.

2.44 Much of the work that does exist is on security guards. As Wakefield (2006) has discussed in her helpful review of the work of security officers, the duties are so diverse, and the contexts in which they work so varied that a variety of reasons are in evidence for why people become and stay involved. These encapsulate a response to redundancy from some other occupation on the one hand, to a desire for a career in law enforcement on the other (see also Wakefield, 2003). Moreover, levels of training, hours of work, times of work (day, night, shifts), pay, exposure to conflict situations, vary markedly with types of duties undertaken and so unsurprisingly an array of findings are in evidence (see for example, Button, 2007; Michael, 1999; Wakefield, 2003; 2006, see also the work of Rigatos, 2002, in Canada).

2.45 Overall, and recognising that much of the work on security officers is dated, the working conditions of security officers are deemed to be poor, with long hours and low pay in evidence, leading inevitably to poor performance. Therefore a culture of wanting to be somewhere else is unsurprising (see Button, 2007; Rigatos, 2002). Indeed, Button, (2007) has mapped the culture of security officers and found three other characteristics, bravado in the face of poor working conditions; a 'trait of solidarity, isolation and inferiority' brought about by a combination of poor and some dangerous working conditions; and machismo brought about by the dominant male working class culture (Button, 2007, p 173). They therefore share many traits with door supervisors (see for example, Hobbs et al, 2003).

2.46 Amongst managers and directors both in security companies and amongst those working in corporate security, there is a connection with former police and military backgrounds. One of the issues that has emerged in recent years, especially in the corporate sector, is whether 'security knowledge' that is the body of wisdom about protecting an organisation, is more or less important than understanding what makes an organisation work, in other words business skills. Much depends on whether one sees security as about protecting assets which may favour a reliance on those with police and military backgrounds against those whose job in security is to help the organisation make a profit, where business skills become more important (see Briggs and Edwards, 2006 and Gill et al, 2007; McGee, 2006). There well may be a shift taking place from the former to the latter although this is difficult to prove in the absence of data.

This study in context

2.47 The study discussed in the following pages builds on this background by focusing on three parts of the private security sector. They are:

- Those who buy/manage security services for the organisation that employs them. We refer to them as clients. These are mostly security specialists but included some who work in procurement and some who are facilities managers where security is only a part of their responsibilities.

- Those who work as managers/directors in contract security companies. These were mostly focused on providing manned guarding services, although a significant minority were involved with security equipment.

- Those who work as security operatives, mostly guarding, but also those who specialize in public surveillance work and door supervisors.

2.48 Given the importance of regulatory issues, and the fact that the regulatory regime was undergoing change, questions were addressed on this issue.

All three samples were asked questions about regulation, but more were presented to managers and directors of contract security companies as they represent the group who are likely to be most engaged in managing discussions about the types of regulation that will ensue and in implementing whatever emerges.[3]

2.49 The other main tenet of questions was on working conditions in the sector and the quality of service offered. Buyers were asked about the impact of the economic climate on their function and about their perceptions of the services offered by contractors. Security operatives about their perspectives on their work and the supervision and management of it. The findings provide an insight into the current state of the security sector, about its workings and about attitudes to regulation.

2.50 The report is organised around a background discussion of the issues, as they have been discussed in previous work, it then assesses each of the three samples in turn. The next section looks at the findings on security guards, door supervisors and public space surveillance operatives separately, although there is overlap here with the discussion on operatives we are aware than many readers will be interested in the differentiation between the three groups. The final section collates the key issues into a discussion of the main overall findings.

2.51 In terms of the sample used and analysis undertaken, full details are available in Appendix One: Methodology and Sample. In summary responses were received from 209 'clients', 509 'directors/managers of suppliers' and 504 'operatives'. SPSS was used to analyse the data, and where relevant statistical tests were run.[4]

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[3] A summary of a survey undertaken by the GMB union reports that most of its members, which includes a range of security operatives, are in favour of regulation change. See, GMB (2012) *GMB Members' Survey: Security Industry Licensing*. Presented at the GMB Security Conference, 24th and 25th January.

[4] All comparisons identified as significant, are statistically significant at $P<0.05$: t tests and ANOVAs were used to compare means, the former for comparing two means, the latter three or more means; chi squared tests were used to compare percentages.

Section 3. The Clients

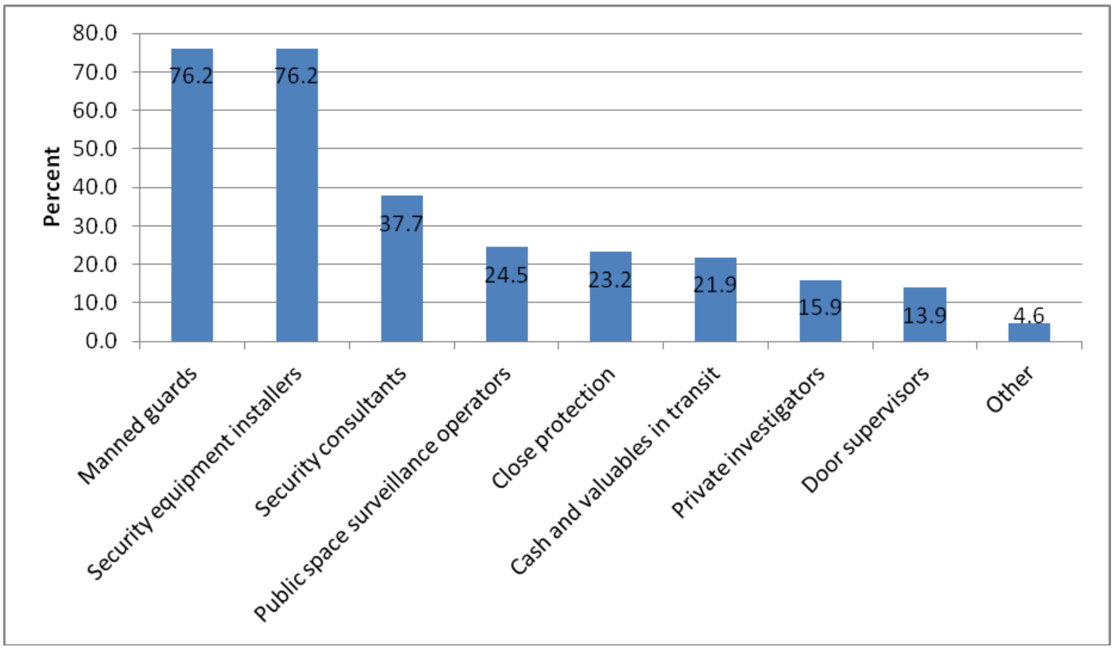
Who is responsible for purchasing security services?

3.1 Two hundred and nine of those participating in the survey said they were buyers of security goods and/or services. Of these, most (77.0%, n=151) described themselves as security specialists; that is they were involved with the security section within the company. The remainder who specified their role said they were either procurement specialists, i.e. they were responsible for buying security and other services (5.1%, n=10) or facilities specialists, i.e. they managed security and other services (10.7%, n=21). Over three quarters (75.3%, n=149) stated that security was their primary responsibility. However, while 93.4% (n=141) of security specialists said that security was their primary responsibility, the remaining ten said it was not. And eight (17.8%) respondents who described themselves as procurement or facilities specialists also said that security was their primary responsibility, indicating that their responsibilities were often broader than their titles would suggest. Nevertheless, the focus of this section is on the 151 who described themselves as security specialists. Where differences between these and procurement or facilities specialists occur, these are noted.

3.2 By far the majority were male (88.7%, n=134) and white (88.1%, n=133). Most were middle aged, with 42.0% (n=63) aged 45-54 and 26.7% (n=40) aged 35-44. In terms of academic qualifications, 34.3% (n=48) had a postgraduate qualification, 24.3% (n=34) a degree, 24.3% (n=34) A Levels and 17.1% (n=24) GCSEs. Less than a quarter (23.8%, n=36)) held an SIA licence although most were members of at least one security-related organisation (82.1%, n=124), the most commonly mentioned being the Security Institute, by 49.0% (n=74); 27.2% (n=41) were members of ASIS. Security specialists were more likely to be members of at least one security-related organisation than were procurement or facilities specialists. This difference was statistically significant. Those who were members of at least one security-related organisation were significantly better qualified, academically, than non-members.

3.3 Almost a quarter (23.3%, n=27) of the companies they worked for employed less than 50 staff. However, more worked for larger companies, with over half (54.3%, n=63) based in companies employing at least 500 staff. Asked in which sectors their company operated, respondents gave a broad range of answers, indicating that no one sector predominated. The most commonly represented were finance (mentioned by 19.2%) (n=29) and retail (17.2%, n=26). Others included energy, public administration, transport, education, property and manufacturing. Asked what security goods and services they procured, security guards and the installation of security equipment were most commonly cited, each by 76.2% (n=115). That said, their requirements covered a broad spectrum of the work of the security industry, as Figure 1 illustrates.

Figure 1: Security services that security specialists procured (n=151)



3.4 In order to assess the need for security services, companies' security specialists were asked what security threats confronted their organisations. As Table 1 illustrates, theft and fraud, cybercrime and organised crime were identified as posing a high risk by at least half, and terrorism and violence directed at staff by about a third. Other procurers were significantly more likely to identify threats than were security specialists.

Table 1: Security specialists' perceptions of the extent to which the following represent a threat to their organisation, on a scale of 1-5, where 5 represents high risk and 1 represents low risk (n=130 to 137)

Threats	High risk (4-5)	Mean risk
Theft & fraud	65.5%	3.84
Cyber crime	58.0%	3.66
Organised crime	50.0%	3.32
Violence towards staff	36.3%	3.01
Terrorism	37.3%	2.96
Drug and alcohol abuse	25.0%	2.49

The quality of security services

3.5 As the managers/purchasers of security for their companies, security specialists provide a unique perspective on the quality of the services on offer and staff engaged in security. Their views demonstrate a positive assessment of many aspects of the industry, but concerns about others.

3.6 For example, when security specialists were asked for their views on the quality of the security services they had used, including cleaners and reception staff as benchmarks, their responses were largely positive. On a scale of 1-5 where 1 indicates high quality and 5 indicates low quality, for all roles the average rating was below '3'. However, three further conclusions can be drawn from Table 2. Firstly, their assessments varied, with close protection services viewed most positively and commercial investigation received least positively. Secondly, in-house services were consistently viewed more positively than contract services. Thirdly, and despite this, the extent to which in-house services were rated more positively varied. It was most pronounced in the case of public space surveillance operators (PSSOs) and the two non-security examples included, least for door supervisors.

Table 2: Security specialists' experience of the quality of service offered by the following, on a scale of 1-5, where 1 indicates high quality and 5 indicates low quality (n=92 to 130)

Service	High Quality (1-2)	Mean
In-house security guards	59.5%	2.35
Contract security guards	39.8%	2.76
In-house door supervisors	44.8%	2.79
Contract door supervisors	33.3%	2.95
In-house public space surveillance operators	65.1%	2.33
Contract public space surveillance operators	34.0%	2.88
Cash and valuables in transit	54.2%	2.44
Close protection	75.0%	1.92
Security equipment installers	58.5%	2.42
Commercial investigators	45.0%	2.65
Security consultants	55.8%	2.53
In-house reception staff	65.3%	2.23
Contract reception staff	38.2%	2.76
In-house cleaners	44.0%	2.68
Contract cleaners	14.5%	3.41

3.7 This clearly-stated preference for in-house services is of particular significance given the next question. When asked directly which offered better value for money, more felt it was contract security (41.7%, n=63) than in house (30.5%, n=46), with 11.3% (n=17) saying that they offered equal value. This finding was consistent for all subgroups of security specialists.

3.8 Just over half (53.1%, n=68) agreed that, 'Private security adds value to our business,' with only 12.6% (n=16) disagreeing. Those with an SIA licence were significantly more likely to agree.[5] However, when security specialists were asked for their opinions on a range of issues concerned with security installation and guarding their evaluation of the companies providing these services ranged from ambivalent to critical. Table 3 shows that they rarely felt *security installers* exceeded expectations, and did not consider them experts in their field, and they certainly didn't feel that this was because profit margins were low. These views were commonly held across all subgroups of security specialists.

Table 3: Security specialists' views of security installers, on a scale of 1-5, where 1 indicates strong agreement and 5 indicates strong disagreement (n=130)

Statement	Strongly Agree or Agree (1-2)	Mean
They generally exceed expectations	13.8%	3.38
The problem with them is that the margins are too low	20.0%	3.37
They are security experts	10.8%	3.88

3.9 Table 4 shows that they also rarely felt *security guarding companies* exceeded expectations, and emphatically rejected the idea that these companies were experts in their field. Additionally, while they considered them trustworthy, they were critical of management. They also felt that guards were underpaid, and, in contrast to their views on security installation companies, held mixed opinions about profit margins. Again, these views were commonly held across all subgroups of security specialists. The verbatim comments included below are typical of the scepticism expressed by many:

> *Overall, I have low respect for manned security even though I have to procure it for our firm and we use in-house guards*

> *In my experience, the contract security staff on the ground will; for the most part; try their utmost to provide a good quality service to their client company. However, the quality*

[5] The scale mean was 2.07 for SIA members, 2.56 for non-members.

of support and administration given by their employer often leaves much to be desired and will result in a lower level of service; due to disgruntled and unhappy frontline staff. Failure to reward and recognise good frontline staff will always ultimately result in poor service and will reflect on the public perception of security staff as a whole and contract staff in particular

...Happy staff will be loyal and eager to work to a high standard. Better pay for the guard and lower profit margins for the company!

The issue of the quality of manned guarding services is not one sided. It requires the 'buyer' to work with the supplier to ensure that the old adage 'if you pay peanuts you get monkeys' is done away with by the raising of salaries and developing those in the industry so that they see it as a career. This will require career progression planning, personal development plans and management with a security management background to understand the business of security and not just be salesmen

Table 4: Security specialists' views of security guarding companies, on a scale of 1-5, where 1 indicates strong agreement and 5 indicates strong disagreement (n=129 to 131)

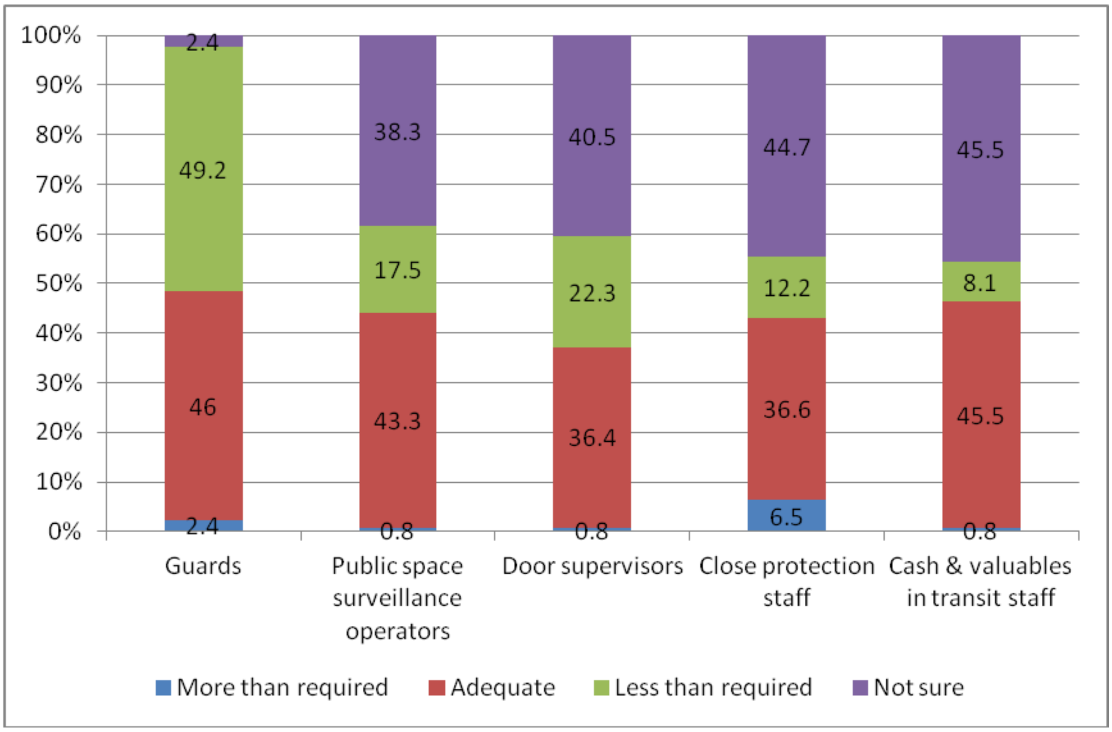
Statement	Strongly Agree or Agree (1-2)	Mean
They generally exceed expectations	14.0%	3.50
The problem with them is that the margins are too low	54.9%	2.35
Guards are generally not paid enough	58.0%	2.30
Management is just not good enough	63.4%	2.39
Guarding companies are security experts	7.7%	4.24
Guarding companies cannot really be trusted	15.3%	3.47

3.10 In the light of these concerns, what solutions are available? Security can be enhanced in a number of ways. In particular: staff performances can be improved through training, as some of the above quotes indicate; the industry can be better monitored though regulation and inspection; and the services provided can be extended through increased financing of security.

The importance of training for staff

3.11 Security specialists were asked for their views on the adequacy of the training received by the security staff they deployed. Figure 2 suggests that, with the exception of guards, a large number were unsure. Excluding these, a majority felt that training was at least adequate. However, in the case of guards, and to a lesser extent door supervisors, considerably more considered that current requirements were less, rather than more than required.

Figure 2: Security specialists' feelings about the current statutory training requirements for the certain security roles (n=120 to 126)



3.12 The general level of dissatisfaction is illustrated in the following quotes:

Regulation of minimum standards of training must be widened to include in house staff. Many companies are providing little if any training.

Ongoing training for officers. Clear progression path. More autonomy for talented officers to support their contract and advise and support clients.

The perception will never change until there is a standard level of training and development for all security teams both in house and contractors.

Training has become another way of making money out of the operatives and is being run by companies that don't care on quality. The training side should be taken away *from companies and given directly to colleges, universities or security academies.*

3.13 The concerns underpinning these feelings are fleshed out in Table 5. Security specialists felt that training was particularly important where risky or conflict situations were involved. However, less than one third felt that the level of training required should be left to the licensed company rather than the regulator for some tasks like those that did not involve public contact.

Table 5: Security specialists' views on training of security guards, on a scale of 1-5, where 1 indicates strong agreement and 5 indicates strong disagreement (n=126)

Statement	Strongly Agree or Agree (1-2)	Mean
Those who work in risky situations should be required to undertake more training than those who do not	93.7%	1.47
Those who deal with conflict situations should be required to undertake more training than those who do not	92.9%	1.46
For some tasks (e.g. those that do not involve public contact) the level of training required should be left to the licensed company rather than the regulator	30.9%	3.41

Inspection and regulation

3.14 Training requirements form a part of the requirements built into a regulatory system, but regulation is much broader than this. Regulation and inspection are key issues within the security industry, with proposals to modify and extend the current system vigorously debated. In the light of this, it is no surprise that security specialists presented a variety of perspectives on the ways in which services are – and should be - regulated and inspected, in some cases demonstrating a collective viewpoint, in others uncertainty and disagreement.

3.15 For example, asked how successful the SIA had been on three levels, security specialists were extremely ambivalent. Only 35.2% (n=44) felt it had eliminated the criminal element from working in the industry, 35.2% (n=44) that it had ensured that the legal requirements for working in the industry had been enforced, and 29.8% (n=37) that it had increased public safety. Table 6 illustrates replies in terms of the average scores on 5 point scales, where 1 indicates that the SIA had been successful and 5 unsuccessful.

Table 6: Security specialists' views of the success of the SIA, where 1 indicates that the SIA has been successful and 5 indicates unsuccessful (n=124 to 125)

Impact of the SIA	Mean
Eliminated the criminal element from working in the industry	2.92
Ensured that the legal requirements for working in the industry have been enforced	2.93
Increased public safety	3.15

3.16 Criticisms of the SIA and the regulatory system are illustrated in the following quotes:

> *Any future regulator should have more teeth than the current SIA and be more proactive in pursuing those who fail to comply.*
>
> *There are still companies operating outside the law but very rarely are they prosecuted and when they are they are never named and shamed. The SIA have taken their foot off the pedal and lost their way along with making fundamental errors along the way.*
>
> *Whatever form of regulation is decided on, it must have teeth and must drive up standards in the industry. The only thing worse than poor regulation is ineffective regulation.*
>
> *It is important that the priority for security is fully realised and that companies HAVE to be properly licensed in order to operate.*
>
> *I think for licensing to be effective it must be backed up by rigorous enforcement and a system of sanctions with real bite. A system of excellence must be just that. Currently the security industry is awash with ex-military personnel (of which I am one) who have no security based qualifications but tout themselves as experts or professionals. They are neither.*

3.17 Nevertheless, as Table 7 illustrates, security specialists were convinced of the need for regulation. Regarding four key sectors of the industry that are not currently regulated, over 80% felt that installing security equipment, private/commercial detective work, and security consultancy should be regulated, and over 70% also considered regulation necessary for the manufacturing of security equipment.

Table 7: Security specialists' views on whether there should be regulation of the following organisations, on a scale of 1-5, where 1 indicates strong agreement and 5 indicates strong disagreement (n=126)

Type of organisation	Strongly Agree or Agree (1-2)	Mean
Private/commercial detective work	81.8%	1.61
Those installing security equipment	85.7%	1.66
Security consultants	80.2%	1.79
Manufacturers of security equipment	70.6%	2.06

3.18 Security specialists were then asked about the aims of regulation. As Table 8 illustrates, they were very clear that the main aims of regulation should include the development of minimum standards to which companies should operate. They also concurred that the aims of regulation should be to keep people safe, and that licensing organisations effectively would increase confidence in the security sector. However, they did not think that licensing should reduce the cost of security to buyers.

Table 8: Security specialists' views on the aims of regulation, on a scale of 1-5, where 1 indicates strong agreement and 5 indicates strong disagreement (n=124 to 125)

Statement	Strongly Agree or Agree (1-2)	Mean
A main aim of regulation should be to develop the minimum standards to which companies must operate	91.9%	1.55
A main aim of regulation should be to keep people safe	72.6%	1.95
Licensing organisations effectively will increase confidence in the security sector	55.2%	2.43
Licensing organisations should reduce the cost of security to buyers	24.8%	3.22

3.19 They were also asked for their feelings about how regulation might look in the future. As Table 9 demonstrates, 76.0% (n=95) thought that representatives from the security sector should sit on the council of the regulatory body, and even more (93.6%, n=117) felt that all directors of security companies should be subject to a 'fit and proper persons' check. However, barely a quarter felt that the security sector was as yet sufficiently mature to be able to manage aspects of its own regulation. Over two thirds also agreed that the licence fee should include the cost of a strong enforcement scheme, and the same number thought that that if the security sector became responsible for assessing competency it was appropriate that the regulator had a power of veto over standards. A majority of security specialists also agreed that business licensing should provide considerable autonomy to security companies to deploy staff and be responsible for them and that public sector buyers should be required to specify attainment of industry hallmarks in contract awards.

Table 9: Security specialists' views on who should be involved in regulation, on a scale of 1-5, where 1 indicates strong agreement and 5 strong disagreement (n=124 to 125)

Statement	Strongly Agree or Agree (1-2)	Mean
Representatives from the security sector should sit on the council of the regulatory body	76.0%	1.90
If the security sector becomes responsible for assessing competency it is appropriate that the regulator has a power of veto over standards	68.8%	2.12
Public sector buyers should be required to specify attainment of industry hallmarks in contract awards	62.1%	2.20
All directors of security companies including shadow directors should be subject to a 'fit and proper persons' check	93.6%	1.40
Business licensing should provide considerable autonomy to security companies to deploy staff and be responsible for them	54.4%	2.44
The security sector is now sufficiently mature to be able to manage aspects of its own regulation	26.7%	3.24
The licence fee should include the cost of a strong enforcement scheme to operate	68.8%	1.99

3.20 Security specialists also viewed the introduction of a hallmark as a positive development. A large majority of those answering (85.5%, n=106) favoured the introduction of a 'hallmark' that recognised quality in addition to the minimum standards required by business licensing. And three quarters favoured a scaled award scheme[6] rather than one benchmark. Almost half (45.2%, n=57) thought that the introduction of a hallmark would increase public regard for licensed security companies, with only one respondent (0.8%) considering it would have a detrimental

[6] Described within the survey as 'A scale of achievement with various levels (e.g. bronze, silver and gold levels)'.

effect.[7] However, as the following two perspectives illustrate, the introduction of a hallmark was seen as a positive step, but not in itself sufficient:

I think a Hallmark is a good idea however this would need to be used for every Supplier otherwise it would just become another ISO. NSI.

Hallmarks and other 'badges' do not increase the quality of the security guard; minimum training standards, rigorous background checks and widespread enforcement by the regulator will increase public confidence in the security industry.

3.21 While security specialists had clear ideas about the way regulation and licensing should be heading, they were somewhat lukewarm about the proposals that were in the pipeline, with 28.3% (n=36) expressing approval and 15.7% (n=20) negative views. Only 11.8% (n=15) said they were unaware of the proposals.

Financing security

3.22 Value-for-money is a key concern among security specialists in a climate where over two in five (45.1%, n=56), agreed that, ‘Security is predominantly a grudge purchase’, with only 20.2% (n=25) disagreeing. This sets the context in which financial decisions *vis a vis* security are made.

3.23 That said, experiences of company spending on security were decidedly mixed: 35.3% (n=47) said that their company’s security budget had been reduced in the previous 2 years, but slightly more (40.6%, n=54) said it had increased. However, in line with the feeling that contract services were thought to offer better value, the budget for contract security work had increased and to a greater extent than for in-house security. Given, as stated earlier, that in-house services were preferred to contract security, this suggests that costs have been cut because value for money is seen as more important than quality. Table 10 also suggests a shift in spending from security guards to hardware.

Table 10: Company spending on different types of security over the past two years (n=85 to 133)

Type	Increased	Stayed the same	Decreased	Not sure
Contract security	41.4%	26.6%	28.1%	3.9%
In-house security	31.8%	30.6%	29.4%	8.2%

[7] 42.1% (n=53) thought it would make no difference, while 11.9% (n=15) were unsure.

Security equipment	60.8%	13.1%	21.5%	4.6%
The number of security guards	20.8%	39.2%	36.7%	3.3%

3.24 Perceptions of the ways in which the recession had affected company security were also mixed. As Table 11 indicates, just over half felt there had been no change, while a third felt security was now more highly valued. Interestingly security specialists were significantly more likely to express this opinion than procurers and facility managers.

Table 11: Security specialists' perceptions of the impact of the adverse economic climate on the security function within their company (n=133)

Value	Percentage
It is now more highly valued	33.1%
Things have remained about the same	51.9%
It is now less valued	13.5%
Not sure	1.5%

3.25 Nevertheless, compared with other mainstream functions within the company. Table 12 demonstrates that in their views security was low priority. It is striking that in each case more felt that other functions were a higher priority than security than felt it was a lower priority, and the relative importance of finance and procurement over security sets the context for understanding how security purchasing decisions are made.

Table 12: Security specialists' perceptions of the level of priority given to other mainstream corporate functions compared to security (n=128 to 132)

Function	Higher priority	Same priority	Lower priority
Human resources	51.5%	31.1%	12.9%
Finance	72.0%	15.9%	7.6%
Marketing	52.3%	22.7%	14.1%
Facilities management	34.1%	43.9%	19.7%
Procurement	46.2%	28.0%	17.4%

3.26 In the light of this it is perhaps unsurprising that security specialists were somewhat pessimistic about future investment on security. Table 13 indicates that on balance they felt investment on contract security services, guarding and investigative work would fall, with a major rise in spending on security equipment. The clear pattern then, is that in financially challenging times companies have shifted expenditure away from 'bodies' and into equipment, and that this is likely to continue.

Table 13: Security specialists' perceptions of the company's investment on security, where applicable, over the coming three years (n=67 to 132)

Type	More	The same	Less
Contract security services	25.8%	33.9%	33.9%
In-house security	31.5%	34.8%	26.1%
Security equipment	52.3%	22.0%	16.7%
Security guarding	19.7%	37.7%	32.0%
Private investigations	12.0%	25.4%	31.3%

3.27 These views contrast with security specialists' concerns, expressed in a range of verbatim comments, that poor funding produced a poor quality service. Indeed, their attitudes are markedly similar to those of security operatives (see below):

> *Security staff and particularly those working in the private sector are under rated and under paid. Many security companies are seeing high profit margins with their staff receiving a minimum wage. Staff should be given many more incentives to provide a good security service....lives often depend upon them!*
>
> *Pay the guards more so that the standard of individual may increase. Ensure hours worked does not affect work capability.*
>
> *When wages are kept low to enhance competitiveness in gaining contracts it does not in general attract the best quality personnel. Until buyers of security services are prepared to pay a fee that will include a higher level of wages to the security guard standards are unlikely to improve much apart from a small number of companies.*

Summary

3.28 Security specialists are largely positive about the security services they procure/manage; over half felt that security added value to their business. They were more positive about in house than contract in terms of quality of service, but more felt that contractors offered better value for money.

3.29 But criticism was in evidence. Installers for example were not seen as security experts and commonly did not exceed expectations, and nor did guarding companies. For the latter, it was not that they could not be trusted, more that the margins under which they operate were too low and staff were not paid enough (and many felt that their training was not good enough) and managers were not sufficiently able. There is a certain irony here of course because organisations are responsible for the conditions under which contractors operate and can, for example, determine how much contractors pay their staff, how much training is provided and the levels of management support that are necessary.

3.30 Although the recession has rendered security functions more highly valued than less highly valued, there is evidence that it is less important than other business functions and this includes facilities management and procurement. It is perhaps significant that only a fifth of security specialists disagreed that security is a grudge purchase.

3.31 Although clients did not view security guarding companies as untrustworthy, they did not feel that decisions about levels of training for those not directly involved in conflict and potentially violent situations should be left to them. Just a quarter felt that the sector was sufficiently mature to manage its own regulation, indeed even if the sector becomes responsible for assessing competency over two thirds felt that the regulator should have a veto over standards. Only a little over a half felt that licensed business should have 'considerable autonomy' to deploy its staff.

3.32 The verbatim comments of clients suggested an awareness that poor quality of security provided was in part as a result of the low pay levels for security operatives.

3.33 There was an ambivalent attitude as to whether the SIA had achieved its objectives although they generally agreed with what it is seeking to achieve. They agreed that the main aim should be to enforce minimum standards, and keep people safe and approved extending it to areas currently unregulated by statute.

3.34 Similarly, there was support for a Hallmark, and only one person felt this could be detrimental. Moreover, most felt that once it existed public sector buyers should be required to specify it.

3.35 One trend that merits focus is that although more felt that contract security was better value than in house, and the budget had increased more than for in house in recent times, moving forward there appears to be a move from investing in security guards to investing in equipment. If this trend is correct then it suggests bigger advantages for integrated services over single suppliers.

Section 4. The Suppliers: Directors' and Managers' Views

Who manages security suppliers?

4.1 In total, 509 managers and directors from security suppliers took part in the survey. Of these, 41.8% (n=195) described themselves as directors, 26.3% (n=123) as senior managers, and 31.9% (n=149) as managers. Here, these are together described as suppliers unless there are differences between them.

4.2 While 23.2% considered themselves site-based, over three quarters were based at regional level or at headquarters. Most were middle aged, with 36.6% (n=178) aged 45-54 and 30.8% (n=150) 35-44, making them on average slightly younger than security purchasers. Again, though, by far the majority were male (88.9%, n=432) and white (91.6%, n=446). In terms of academic qualifications, 20.9% (n=95) had a postgraduate qualification, 20.9% (n=95) a degree, 22.2% (n=101) A Levels and 35.9% (n=163) GCSEs. Those who described themselves as directors were on average significantly older and with higher level academic qualifications.

4.3 Most held an SIA licence (72.5%, n=353) and they or their companies were usually members of at least one security-related organisation (69.7%, n=355), most commonly BSIA (24.5%, n=125), the Security Institute (19.8%, n=101) and ASIS (12.4%, n=63). Those with an SIA licence included significantly more 'managers' than 'directors'. Those who said that they or their companies were members of at least one security-related organisation were significantly older, with higher level academic qualifications, and more likely to be directors.

4.4 Combined, they demonstrated a wealth of experience in the security industry, with 14.1% (n=64) reporting over 30 years in the industry, 25.3% (n=115) 21-30 years' experience and 37.6% (n=171) 11-20 years. Those who had worked for longer in the industry were significantly older, included disproportionally more directors, and were more likely to say that they or their companies were members of at least one security-related organisation.

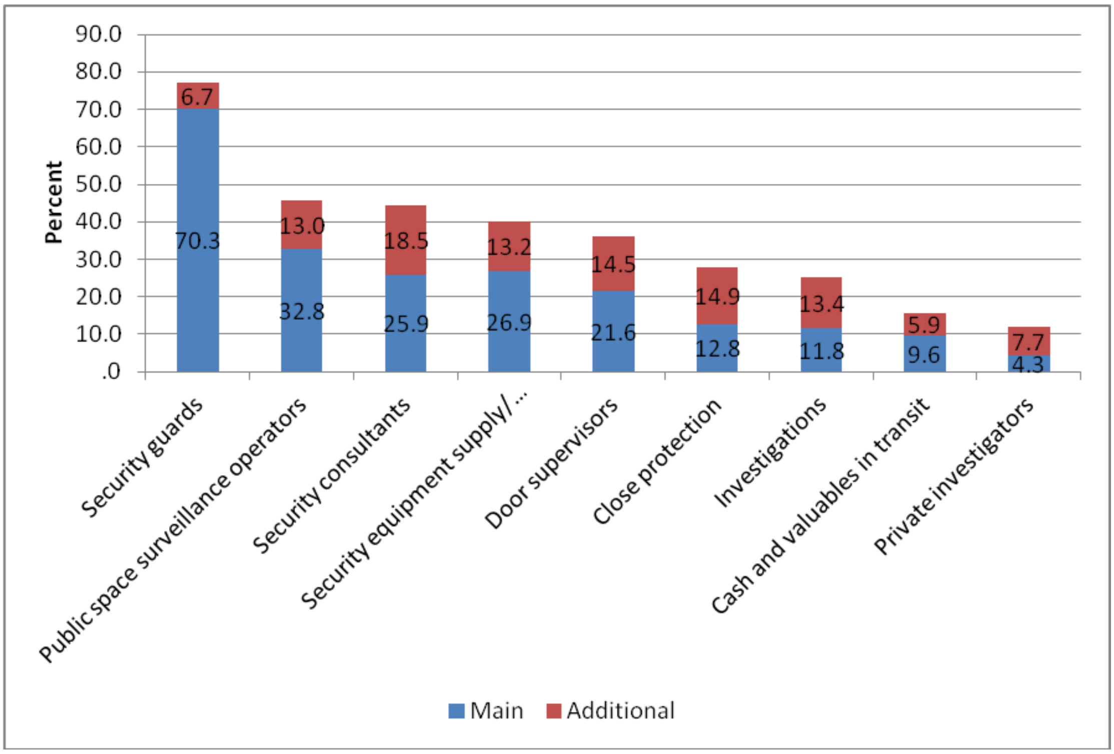
4.5 As with security procurers, almost a quarter (23.8%, n=110) of their companies employed less than 50 staff. However, the majority were much larger, with 31.7% (n=147) employing at least 3,000 staff. Those who had worked longer in the industry were significantly more likely to work in smaller companies. Respondents based in smaller and – especially - medium sized companies were significantly more likely to say that they or their companies were members of at least one security-related organisation, while those working in larger companies were more likely to hold an SIA licence.

4.6 Most respondents stated their employers (69.2%, n=322) were ACS accredited, and this was significantly more so for companies employing at least 3,000 staff, where 93.7% (n=134) were ACS accredited. Those who held an SIA licence were also significantly more likely to work for ACS accredited companies: indeed, 84.1% (n=285) of those holding an SIA licence were based in ACS accredited companies, compared with 31.3% (n=35) of those without an SIA licence.

4.7 Their companies covered a broad spectrum of the work of the security industry, although as Figure 3 illustrates by far the most common was the provision of security guards. At least a quarter also described supplying public space surveillance (PSS) staff, installing or maintaining security equipment, and security consultancy as main areas of their business. The predominance of security guarding services mirrored the answers of clients, although these respondents from suppliers were less likely to include security equipment in their companies' remit.

4.8 Not surprisingly, companies providing security guarding, door supervision, PSS and cash-in-transit services, as well as those involved in the supply, installation or maintenance of security equipment were significantly more likely to be ACS accredited. Those whose business involved security consultancy and investigations were significantly more likely to say that they or their companies were members of at least one security-related organisation.

Figure 3: Main and additional areas of business



Managing security

4.9 As the directors and managers of security providers, a management perspective on the services on offer and staff deployed provides an invaluable counterpart to the views of their clients (and their staff). The questions asked of the clients on the one hand and suppliers on the other overlapped considerably. In this section the focus is on managing security and the implications of regulation including proposed changes, and managing staff.

4.10 More specifically, in the case of managing security, suppliers were asked a series of questions about their views concerning inspection and enforcement, regulation, whether or not hallmarks were a positive step forward, financial constraints, and why they felt companies changed their security suppliers.

4.11 Asked how successful the SIA had been on three levels, suppliers – like clients – held mixed views, albeit they were somewhat more positive in each case. For example, 39.9% (n=182) felt it had eliminated the criminal element from working in the industry (one of the SIA's key aims) and 41.7% (n=189) that it had ensured that the legal requirements for working in the industry have been enforced. Less (27.8%, n=126) considered that it had increased public safety. Table 14 illustrates replies in terms of the average scores on 5 point scales, where 1 indicates that the SIA had been successful and 5 unsuccessful, with a midrange score of 3.00.

Table 14: Suppliers' views of the success of the SIA, where 1 indicates that the SIA had been successful and 5 unsuccessful (n=453 to 456)

Impact of the SIA	Mean
Increased public safety	3.05
Eliminated the criminal element from working in the industry	2.83
Ensured that the legal requirements for working in the industry have been enforced	2.76

4.12 Nevertheless, verbatim comments demonstrate widespread unease with the present system:

> *The SIA are a joke and the sooner its replaced by the new Regulator the better.*

> *Regulation of the Industry needs to become harder, too many companies are barely achieving requirements, or in some cases are not even achieving the requirements but are seeing no consequences for failing to meet the required standard. The current assessment method is extremely poor and enables a lot of serious quality issues to be hidden and masked and assessment bodies / SIA do not have the guts to punish these companies as they effectively lose*

revenue from it. Regulation on these bodies also needs to be much harder, there are assessment bodies out there that hand accreditations out on a plate for very little work (in all security areas but especially electronic & guarding), not only does this lower standards, erode confidence in them but it is also extremely unfair to those people/ companies that work hard, to try and do things properly and who want better quality. More emphasis needs to be placed on quality, not just meeting the required standards but surpassing them. As an industry we shouldn't be simply achieving the basis's and we have to move away from 'well the client is happy' to an attitude of 'we can do better than this', as an industry we can provide better officers, better solutions and that in itself will ultimately lead to an increase public/buyer confidence. Regulation is desperately needed but it cannot fail to address half of the main problems like the SIA did, it promised a lot but didn't live up to 90% of it.

SIA needs tightening up on standards in the field, also trainers need to be checked on, there are too many trainers who pass people to keep up the pass rate, the private security industry still has thugs who work on doors and keep the name of decent doorstaff down.

Need more enforcement and checks done by SIA, to force companies to close immediately if found to be doing illegal stuff.

4.13 There were, however, significant differences between different subgroups of directors/managers in their assessment of the SIA. Those who held an SIA licence were particularly likely to consider the SIA successful. Those involved in security guarding and public space surveillance were also relatively positive, while those working for the smallest companies were more critical. Those working for ACS approved companies were more likely to feel that that it had ensured that the legal requirements for working in the industry have been enforced, but their views were no different to other directors/managers in other respects.

4.14 Nevertheless, as Table 15 illustrates, directors/managers were, like clients, convinced of the need for further regulation. Regarding four key sectors of the industry that are not currently regulated, over 80% felt that installing security equipment, private/commercial detective work and security consultancy should be regulated, and almost two thirds also considered regulation necessary for the manufacturing of security equipment. However, while clients put rather more emphasis on the need to regulate those installing security equipment, directors/managers prioritised the regulation of security consultants and detective work.

4.15 The desirability of further regulation was widely accepted, but it was significantly more likely to be favoured by those in ACS accredited companies, whereas again those from the smallest companies were less convinced.

Table 15: Suppliers' views on whether there should be regulation of the following organisations, on a scale of 1-5, where 1 means agree strongly and 5 means disagree strongly (n=389 to 392)

Organisation	Strongly agree or Agree (1-2)	Mean
Those installing security equipment	83.2%	1.70
Manufacturers of security equipment	63.0%	2.20
Private/commercial detective work	86.4%	1.52
Security consultants	88.0%	1.55

4.16 Like clients, suppliers were then asked about the aims of regulation. As Table 16 illustrates, they clearly agreed that two of the main aims of regulation should be to develop minimum standards to which companies should operate and to keep people safe, and also endorsed the suggestion that licensing organisations effectively would increase confidence in the security sector. In each case the mean score is well below the 3.00 scale midpoint. At the same time, they rejected the idea of an 'elite club' of top end companies. In terms of the costs involved, they rejected both the suggestion that licensing organisations would have the effect of reducing the cost of security to buyers and that businesses should be expected to pay more for their licence to ensure that a strong enforcement scheme was in operation. In terms of the burden of costs for regulation, there was ambivalence about whether or not the poorest performers should bear the majority of the costs for enforcement (27.7%, n=112, in favour and 38.7%, n=157, against) and whether those who had British/International Standards accreditation should pay proportionately less (33.6%, n=136, in favour and 30.1%, n=122, against). Notably, there were no significant differences between those whose companies were ACS accredited and other directors/managers on whether poor performers should pay more or companies that had followed British/International Standards less.

Table 16: Suppliers' views on the aims of regulation, on a scale of 1-5, where 1 means agree strongly and 5 means disagree strongly (n=402 to 407)

Statement	Strongly Agree or Agree (1-2)	Mean
The main aim of regulation should be to develop an 'elite club' of top end companies	25.2%	3.62
A main aim of regulation should be to	82.3%	1.74

develop the minimum standards on which companies must operate		
A main aim of regulation should be to keep people safe	73.6%	1.90
Licensing organisations effectively will increase confidence in the security sector	69.1%	2.13
Licensing organisations should reduce the cost of security to buyers	26.9%	3.14

4.17 Suppliers were also asked for their feelings about who should be involved in regulation. As Table 17 demonstrates, the idea that representatives from the security sector should sit on the council of the regulatory body was strongly endorsed, as was acceptance of the fact that all directors of security companies should be subject to a 'fit and proper persons' check. However, less than two in five felt that the security sector was as yet sufficiently mature to be able to manage aspects of its own regulation, and the mean score of 2.94, close to the scale midpoint, reflects a divided opinion among suppliers. A majority of suppliers, though, agreed:

- that business licensing should provide considerable autonomy to security companies to deploy staff and be responsible for them (with SIA licence holders significantly more likely to agree);
- that public sector buyers should be required to specify attainment of industry hallmarks in contract awards (with directors/managers of ACS accredited companies significantly in favour);
- and that if the security sector becomes responsible for assessing competency it was appropriate that the regulator had a power of veto over standards (a widely held view across all subgroups).

4.18 Representatives of ACS approved companies were significantly more likely to agree that: representatives from the security sector should sit on the council of the regulatory body (mean 1.70); public sector buyers should be required to specify attainment of industry hallmarks in contract awards (mean 2.20); and all directors of security companies should be subject to a 'fit and proper persons' check (mean 1.44).

Table 17: Suppliers' views on who should be involved in regulation, on a scale of 1-5, where 1 means agree strongly and 5 means disagree strongly (n=404 to 407)

Statement	Strongly Agree or Agree (1-2)	Mean
Representatives from the security sector should sit on the council of the regulatory body	86.3%	1.70
If the security sector becomes responsible for assessing competency it is appropriate	57.0%	2.35

that the regulator has a power of veto over standards		
Public sector buyers should be required to specify attainment of industry hallmarks in contract awards	62.6%	2.20
All directors of security companies including shadow directors should be subject to a 'fit and proper persons' check	89.5%	1.44
Business licensing should provide considerable autonomy to security companies to deploy staff and be responsible for them	69.2%	2.07
The security sector is now sufficiently mature to be able to manage aspects of its own regulation	39.0%	2.94

4.19 Finally, almost three quarters (73.4%, n=295) agreed that the key to the success of a security regulator was the effectiveness of its enforcement regime. However, views were divided as to whether the inspection procedures for the Approved Contractor Scheme were weak, with 27.0% (n=110) feeling that they were, 26.5% (n=108) disagreeing and 29.2% (n=119) undecided.[8] Those who worked for ACS approved companies were significantly more likely to be critical in this respect, as were those working in security guarding, PSS, cash-in-transit, and security consultancy. In contrast, those from companies with under 50 staff were significantly less likely to think inspection procedures were weak.

4.20 Suppliers also proffered their opinions on the desirability of hallmarks for the industry. A large majority (78.7%, n=310) favoured the introduction of a 'hallmark' that recognised quality in addition to the minimum standards required by business licensing, and approval was high from all sectors surveyed, albeit slightly less than among clients. About two thirds (66.3%, n=260) favoured a scaled award scheme rather than one (high or low) benchmark. Asked who should manage the hallmark, opinions varied, although overall the ‘inspectorates and certifiers’ was the most common choice, considered very appropriate by 44.0% (n=169), but there was no significant support for any of the other options offered. As Table 18 illustrates, though, views were mixed, and in all other cases the scale mean fell around the midpoint.

[8] I.e. registered 3 on the 5 point scale. Additionally 17.2% (n=70) said they were unsure.

Table 18: Suppliers' feelings about who should manage a hallmark scheme, where 1 signifies very appropriate and 5 completely inappropriate (n=380 to 386)

Body	Mean score
Buyers	3.56
Public sector	3.37
Providers	3.18
Emergency services	3.07
ACPO	3.03
Trade associations	2.90
Training organisations	2.89
Inspectorates & certifiers	1.85

4.21 Despite suppliers' concerns over quality, however, it was clear that costs were an equally important, and often overriding, concern. Thus almost two thirds (64.9%, n=262) felt that, 'Low margins change the focus of contract security directors/managers from security to cost control'. These views were common across the sector but particularly so among those working in public space surveillance. About half (50.9%, n=205) also accepted that, 'Security is predominantly a grudge purchase' (more than among procurers), with only 23.0% (n=93) disagreeing. Representatives of smaller companies were significantly more likely to consider security a 'grudge purchase', but not those operating in the cash-in-transit and security equipment sectors. The wider implications of this were noted:

> *Absolutely support the drive to increase standards within the industry but the simple economics of the times we face almost make standards "" a nice to have"". We have always sought to maintain the highest levels of accreditations to demonstrate to clients and potential clients that we operate to the highest standards. In the current economic climate it is now a serious consideration as to which standards you strive for as the market is not supporting them. Clearly that sets a different conundrum for both suppliers and buyers - how cheap is too cheap and what do you really sacrifice for saving that 10p an hour? We are finding that a lot of new contracts not only minimise the margin but defer large chunks of risk too, so contracts are becoming more punitive as clients strive to get quality but build in claw backs to make sure budgets are hit.*

> *Main area for the security industry not providing standards of service that are required and can be achieved, is the continued pressure on pricing by most customers. The industry is capable of achieving and delivering way beyond*

current standards if end users accepted this comes at a price and stop commoditising the industry.

The industry has greatly improved at all standards but is now severely hampered by cost saving initiatives driven by client procurement and budget management.

4.22 As Table 19 demonstrates, asked to cite the most common reasons for severing contracts or changing suppliers in their area of security, over two thirds highlighted the need to cut costs, with just over half opting for poor quality or service. The need to keep costs down was significantly more likely to be mentioned by those from larger and ACS approved companies, and by suppliers with an SIA licence who were not based on a single site.

Table 19: The most common reasons for severing contracts/ changing suppliers in the area security directors/managers worked in (n=509)

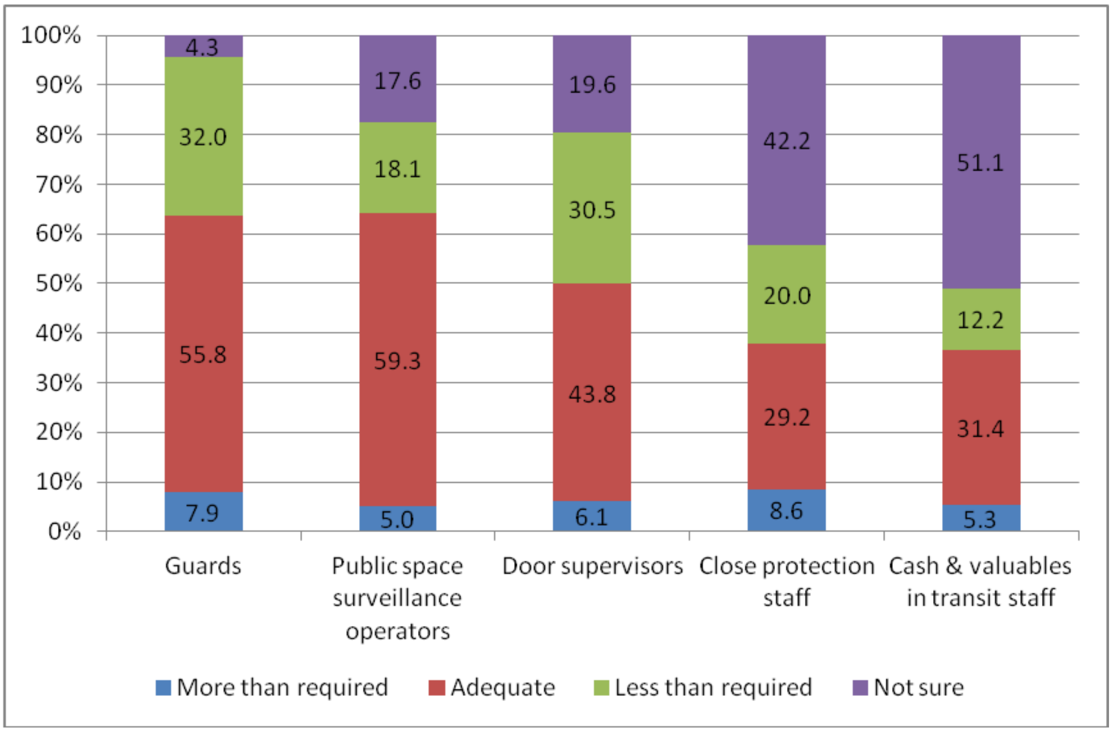
Reason	Percentage
Desire to reduce costs	68.4%
Poor service/quality of current supplier	51.1%
Requirement to retender periodically	41.1%
Desire to standardise services to one supplier or vice versa	30.3%
Acquisition or sale of part of the business	13.8%
Need to change or upgrade security provision	11.2%
Legislative/regulatory requirements	4.1%

Managing staff

4.23 Suppliers were also asked for their views on the security staff they employed. Figure 4 suggests that in general directors/managers felt that training was adequate, although many were unsure, especially with regard to those working in close protection and cash and valuables in transit. Excluding these, a majority felt that training was at least adequate. However - as with clients - in the case of guards and door supervisors, considerably more thought that current requirements were less than was required.

4.24 In general, younger and better educated suppliers were significantly more critical of training requirements. Those whose companies covered door supervision were also significantly more critical of the adequacy of training. In contrast, those involved in security guarding were significantly more likely to feel that training was adequate for those employed in guarding and PSS; the criticism of the guards training was from those not directly involved in managing guarding work.

Figure 4: Suppliers' feelings about the current statutory training requirements for the following roles (n=370 to 391)



4.25 The concerns underpinning these feelings are fleshed out in Table 20. Suppliers agreed with security procurers that training was particularly important where risky or conflict situations were involved. They were similarly more ambivalent about whether the level of training required should be left to the licensed company rather than the regulator for some tasks like those that did not involve public contact.

Table 20: Suppliers' views on training of security guards, on a scale of 1-5, where 1 means agree strongly and 5 means disagree strongly (n=391 to 392)

Statement	Strongly Agree or Agree (1-2)	Mean
Those who work in risky situations should be required to undertake more training than those who do not	86.7%	1.63
Those who deal with conflict situations should be required to undertake more training than those who do not	89.8%	1.57
For some tasks (e.g. those that do not involve public contact) the level of training required should be left to the licensed company rather than the regulator	36.3%	3.18

4.26 These finding should be considered in the context of staff turnover. As Table 21 indicates, suppliers felt that staff turnover in the industry was extremely high. In contrast, they felt that it was not a problem in their company. A disparity between these sets of answers is not surprising but the magnitude of the disparity is, with a difference of 1.53 in the mean scores on the 5 point scale. Moreover, this difference generally held for different suppliers from different types and size of company.

Table 21: Suppliers' perceptions of staff turnover, on a scale of 1-5, where 1 means very high and 5 means very low (n=391 to 392)

Turnover	Very High or High (1-2)	Mean
In the security industry	70.9%	2.07
In their company	13.6%	3.75

4.27 That said, younger respondents and those working in security guarding were significantly more likely to feel that staff turnover both in the industry and their own company was higher. Those who described themselves as 'managers' rather than 'senior managers' or 'directors', relative newcomers to the security industry and those with an SIA licence were also significantly more likely to see turnover within their company as relatively higher.

4.28 Additionally, staff turnover in their company was also significantly more likely to be considered higher among those working for companies that were ACS approved and comparatively large. In contrast, those involved in consultancy and investigations viewed turnover in their company as especially low.

4.29 Asked why people left contract security work in their area of security, Table 22 shows that suppliers saw three reasons as crucial: poor pay (especially among those involved in security guarding and PSS); limited opportunities for development; and a feeling that they weren't appreciated. Since these all reflect on the employer, it is understandable that suppliers saw high turnover as other companies' problem rather than their own. They were least likely to see lack of training, the dangers inherent in security work, or poor quality of staff as explanations of high turnover.

Table 22: Suppliers' views about why people leave contract security work in the area of security they were engaged in, on a scale of 1-5, where 1 means agree strongly and 5 means disagree strongly (n=391 to 392)

Reason	Strongly agree or agree (1-2)	Mean
Poor pay	71.6%	2.02
Limited opportunities for development	63.8%	2.25
Insufficient training	24.0%	3.27

Don't feel appreciated	53.5%	2.54
Not very good at their job	24.3%	3.30
Poor working environment	34.3%	2.92
The work is not interesting	36.8%	2.93
There is a risk of conflict/ violence	24.0%	3.32

4.30 Notably, and not surprisingly, those working in security guarding and door supervision were significantly more likely to cite the risk of conflict or violence as a factor, although even here the mean scores (3.31 and 3.22 respectively) were scarcely dramatic. These views are particularly notable when compared to those of security operatives which are discussed in the next section.

Summary

4.31 The striking finding from the responses from suppliers is the ever increasing burden of cost cutting. This was clear from answers to both precoded and open-ended questions. A half felt that security was a 'grudge purchase' (for some sectors at least), and the focus on low margins drove the emphasis away from good security to that of cost. Indeed, the majority felt that decisions to retender were predominantly about cutting costs. This leads to an additional problem, high staff turnover, which they recognised was an industry problem, and influenced by poor pay, a lack of appreciation and no clear path for development.

4.32 Suppliers were able to see the benefits and drawbacks of the current regulatory regime, but were more positive than clients. They too favoured regulation being extended to other parts of the security sector. For them it had been partially successful in introducing important changes to the industry, but less so in generating a benefit that was linked to the overall aim of regulation, such as making people safer. An important caveat here is that those who held an SIA licence, and those who were employed by companies that were ACS accredited, and may be closer to the work of the SIA, were often more positive.

4.33 Overall they agreed with the main aims of the SIA, to reduce criminality and raise standards, and felt that effective legislation increased confidence in the security sector. It is perhaps surprising that they did not feel an aim of regulation should include the desire to reduce costs to buyers. And while they saw merit in representatives from the security sector being involved strategically in regulation they felt there were limits to what could be expected of a sector that lacked maturity.

4.34 A hallmark to identify quality was seen as a good thing, although it seems that the inspection regime will need to be better than the one that currently exists for the ACS (which the hallmark will replace). Suppliers too felt that public sector buyers should be required to demand the hallmark; and predictably, they favoured security companies being granted autonomy to deploy their staff.

4.35 Overall, they felt training could be improved. Those who were involved with door supervisors especially felt so. Those involved in managing guards were more positive about guard training even if others were not. The principle that those involved in risky or conflict situations should receive more training was supported, but trusting companies to determine training in other cases was, perhaps surprisingly, less enthusiastically supported. This may be a further reflection of the view that the sector was as yet insufficiently mature to manage too much itself.

4.36 Suppliers recognise turnover in the industry as high, but felt that this was less so in the companies they worked for. It seems that the reasons rest less with the nature of the work in dealing with risky situations (as is sometimes supposed), and more in working conditions, specifically in terms of pay, limited personal development and lack of appreciation. These are things at least that companies can control, especially- and perhaps only - with the support of clients.

Section 5. Security Operatives: Contract and In-house

Who are security operatives?

5.1 In total, 504 security operatives completed the questionnaire, of whom 43.7% (n=203) described themselves as supervisors. Not surprisingly, perhaps, they tended to be slightly younger than security directors/managers, with 23.2% (n=112) aged 25-34, 24.1% (n=116) aged 35-44 and 26.3% (n=127) aged 45-54. However, there was no significant difference in age between supervisors and those working at operational level.

5.2 Again, the majority were male (88.5%, n=422) and white (81.7%, n=394). While the proportion who were non-white was greater than for directors/managers, this did not imply a large proportion of migrant workers in the security industry: 90.1% (n=328) said their first language was English. In fact, 78.8% (n=286) described themselves as white with English as their first language; 5.0% (n=18) as white with another first language; 9.9% (n=36) as non-white with English as their first language; and 4.7% (n=17) as non-white with another first language.

5.3 In terms of academic qualifications, 6.9% (n=27) stated they had a postgraduate qualification, 15.7% (n=61) a degree, 24.9% (n=97) A Levels and 52.4% (n=204) GCSEs. Supervisors were significantly better qualified.[9]

5.4 Most held an SIA licence (93.6%, n=452). Some held a licence in more than one area, but that said, only three areas were mentioned by more than 5% of operatives: security guarding (55.4%, n=279); door supervision (34.7%, n=175); and public space surveillance (PSS) (28.8%, n=145). Less than half were members (either individually or their employer was) of any security-related organisation (42.5%, n=214). The most common was membership of the BSIA, but even here only 14.5% (n=73) said they were members. Over half (57.2%, n=263) said that their employers paid for their licences, but a large minority (37.6%, n=173) paid for them themselves. Supervisors were no more likely to have their licences paid for.

5.5 Security operatives evidenced considerable experience of working in the security industry, with 18.2% (n=83) reporting working over 20 years and 35.4% (n=162) noting 10-19 years experience. Older operatives had worked in the security industry for significantly longer, and supervisors

[9] In terms of having at least A levels.

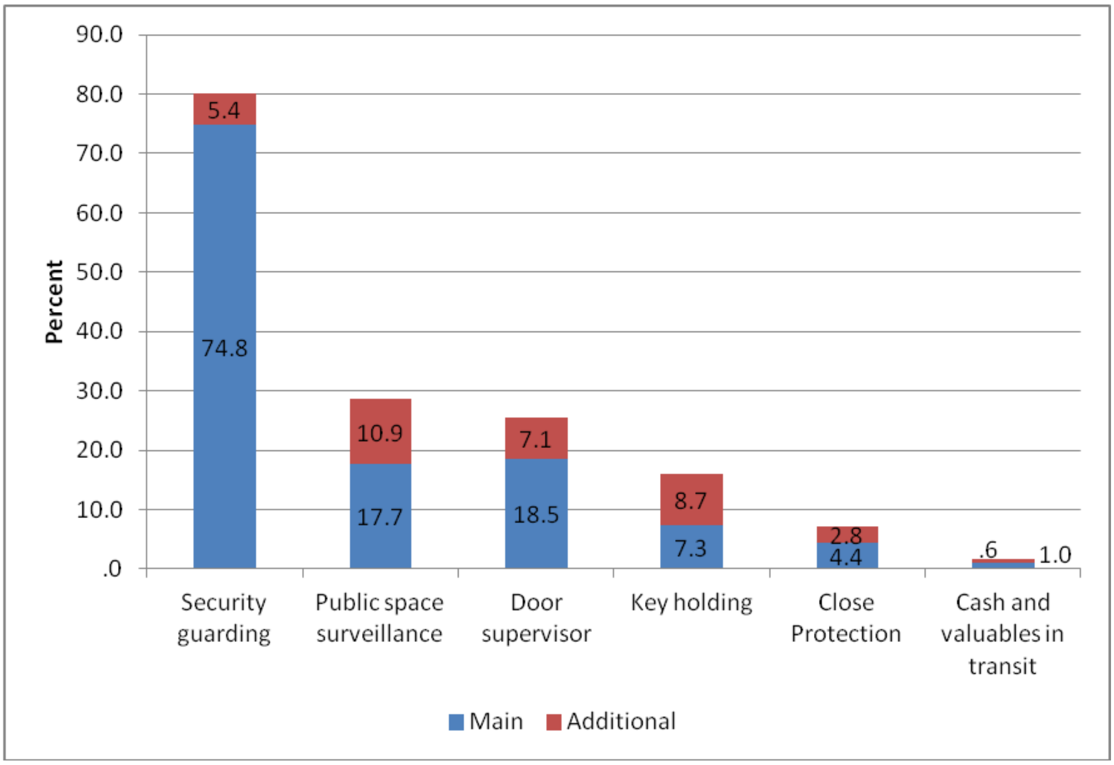
were significantly less likely to be relative newcomers to the industry and more likely to have worked in security for 10-19 years.

5.6 Most worked both days and nights (57.4%, n=268), with 33.8% (n=158) typically just working days and few (8.8%, n=41) working just nights. Most (93.3%, n=435) worked full-time as security operatives, although 10.3% (n=48) said they had at least one other job. On average they were rostered to work about 47 hours per week, but in fact worked about four hours more than this. Those who had additional jobs averaged nearly 20 hours per week on these, indicating that security operatives in general, and those with second jobs in particular worked long hours:

- Full-time staff worked, on average, 48.4 hours; 8.5% (n=37) had a second job, working an average 14.6 hours per week at this.
- Part-time staff worked, on average, 24.3 hours; a third had at least one more job, at which they worked an average 34.2 hours per week.

5.7 Asked what the main areas of their work were, almost three quarters (74.8%, n=377) mentioned security guarding, paralleling the replies of security directors/managers. As Figure 5 illustrates, door supervision and public space surveillance were also mentioned by a not inconsiderable number of operatives.[10]

Figure 5: Main and additional areas of work



5.8 Asked what their duties covered: 36.1% (n=137) said they worked 'most of the time' in the financial sector; 15.6% (n=60) dealing with conflict

[10] A minority included more than one area as their 'main' work.

situations; 9.7% (n=32) working in pubs and clubs; 8.8% (n=32)[11] crowd control; and 6.4% (n=22) each working in shopping malls and retail stores.

5.9 Almost three quarters (74.3%, n=347) worked for a contract company, with 14.6% (n=68) working ‘in-house’ and 9.2% (n=43) combining both. Those working in-house were better qualified, academically. Security operatives who said they combined in-house and contract work were significantly more likely to pay for their own licences. Just over half (51.0%, n=238) were based on one site, with the remainder split between those who typically worked at one site but occasionally at other sites (24.6%, n=115) and those whose work was split between a number of sites (23.6%, n=110). About half (49.9%, n=229) said that their work incorporated functions that were not security-related. Older operatives were significantly more likely to say this.

Views on inspection and regulation

5.10 Questions concerning regulation within the security industry covered two key issues. Firstly, regarding the four key sectors of the industry that are not currently regulated, operatives echoed the views of clients and directors/managers in considering regulation necessary, albeit least so *vis a vis* the manufacturers of security equipment. As Table 23 illustrates, over 70% were in favour of regulation in each case and in terms of scale means were well below the midpoint. Taking all four together, older operatives were significantly more likely to favour regulation.

Table 23: Operatives’ views on whether there should be regulation of the following organisations, on a scale of 1-5, where 1 means agree strongly and 5 means disagree strongly (n=432 to 436)

Sectors	Strongly Agree or Agree (1-2)	Mean
Security consultants	87.8%	1.53
Private/commercial detective work	87.6%	1.57
Those installing security equipment	85.8%	1.68
Manufacturers of security equipment	70.8%	2.00

5.11 Asked about the aims of regulation, as Table 24 illustrates, a large majority agreed with clients and directors/managers of suppliers of security that two of the main aims of regulation should be to develop minimum standards to which companies must operate and to keep people safe, and almost three quarters felt that licensing organisations effectively would increase confidence in the security sector. In each case,

[11] Although the ‘n’ value for ‘working in pubs and clubs’ and ‘crowd control’ are the same, the percentages differ because the number of respondents differ.

but particularly with regard to the aim of keeping people safe, operatives were particularly forceful in their views compared with clients and directors/managers of suppliers.

5.12 Older operatives and those who had been in the business for longer were significantly more likely to feel that a main aim of regulation should be to develop minimum standards, as were those who worked in PSS.

Table 24: Operatives' views on the aims of regulation, on a scale of 1-5, where 1 means agree strongly and 5 means disagree strongly (n=437 to 439)

Statement	Strongly Agree or Agree (1-2)	Mean
A main aim of regulation should be to develop the minimum standards on which companies must operate	91.8%	1.53
A main aim of regulation should be to keep people safe	88.3%	1.61
Licensing organisations effectively will increase confidence in the security sector	74.3%	1.95

5.13 Operatives also agreed with security directors/managers that all directors of security companies, including shadow directors, should be subject to a 'fit and proper persons' check, with 92.7% (n=407) agreeing with this. Again, older operatives and those who had been in the business for longer were significantly more likely to agree. Less felt that the security sector was sufficiently mature to be able to manage aspects of its own regulation (40.6%, n=178), with slightly under a third (32.9%, n=144) disagreeing. However, on this question operatives, like directors and managers, showed themselves to be rather more in favour than did clients. Nevertheless, their views were often scathing:

> *Statement "The security sector is now sufficiently mature to be able to manage aspects of its own regulation" - I totally disagree with this statement. Once the Security Sector are left to self regulate then we will return to the bad old days of bouncers and watchmen.*
>
> *There are still many rogue companies out there.*
>
> *The industry has improved, but it cannot and should not regulate itself. Legislation is there for a reason, the state is responsible for ensuring compliance with legislation.*
>
> *Clients do not appreciate their security team so rates stay low. Mostly this is because of rogue companies who do not provide a good service and give the whole industry a bad name. Get rid of the rogues so the industry becomes more*

professional.

5.14 Considering the largest three subcategories of those working as security operatives – security guards, door supervisors and PSS operatives – their views on inspection and regulation were broadly similar. For example, their views were similar on regulation of the four key sectors of the industry that are not currently regulated. The most notable difference was where PSS operatives were significantly more likely than other staff to agree that the aims of regulation included developing minimum standards.

Working in security

5.15 The main focus of the survey of security operatives, however, was on their personal experiences of working in the industry. Most (82.9%, n=379) felt they were adequately trained for their security work, although 13.8% (n=63) disagreed. Indeed, the inadequacy of training and certification was a common criticism:

> *SIA licensing was brought into force to improve the quality of training and service but over the years it is not proving sufficient enough.*
>
> *The S.I.A have been a law unto themselves since their inception. It has been a money making 'quango' for select personnel to regulate the industry for their own benefits. Unsuitable people with no experience or who are clearly not suitable for security work have been able to pass an attendance course and receive an S.I.A badge. This has brought the standards down and unfortunately made the industry harder for quality professionals to find work. The sub-standard conveyor belt keeps producing lower skilled operatives who are employed for lower wages and an easy career. The men at the top get richer and the below par security operative finds work, thus bringing the good name of security into disrepute*

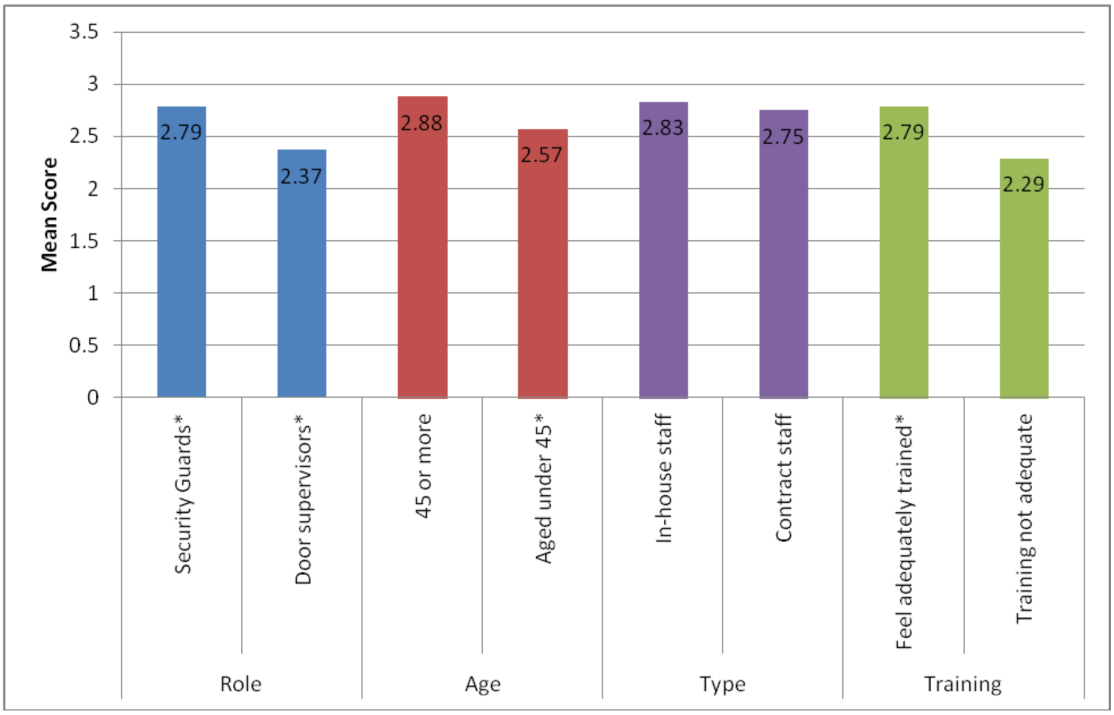
5.16 As Table 25 indicates, they were also, like management, more likely to feel that staff turnover was high in the security industry than in their company. However, the differences here were less stark, with a difference in scale means of only 0.41. As a result, they were less likely than directors/managers to feel that staff turnover in the industry was high, but more likely to consider it high in their company. However, more chose not to answer the question about their own company (n=88) compared with the wider industry (n=64).

Table 25: Operatives' perceptions of staff turnover, on a scale of 1-5, where 1 means very high and 5 very low (n=416 to 440)

Turnover	Very high or High (1-2)	Mean
In the security industry	46.8	2.71
In their company	29.6	3.12

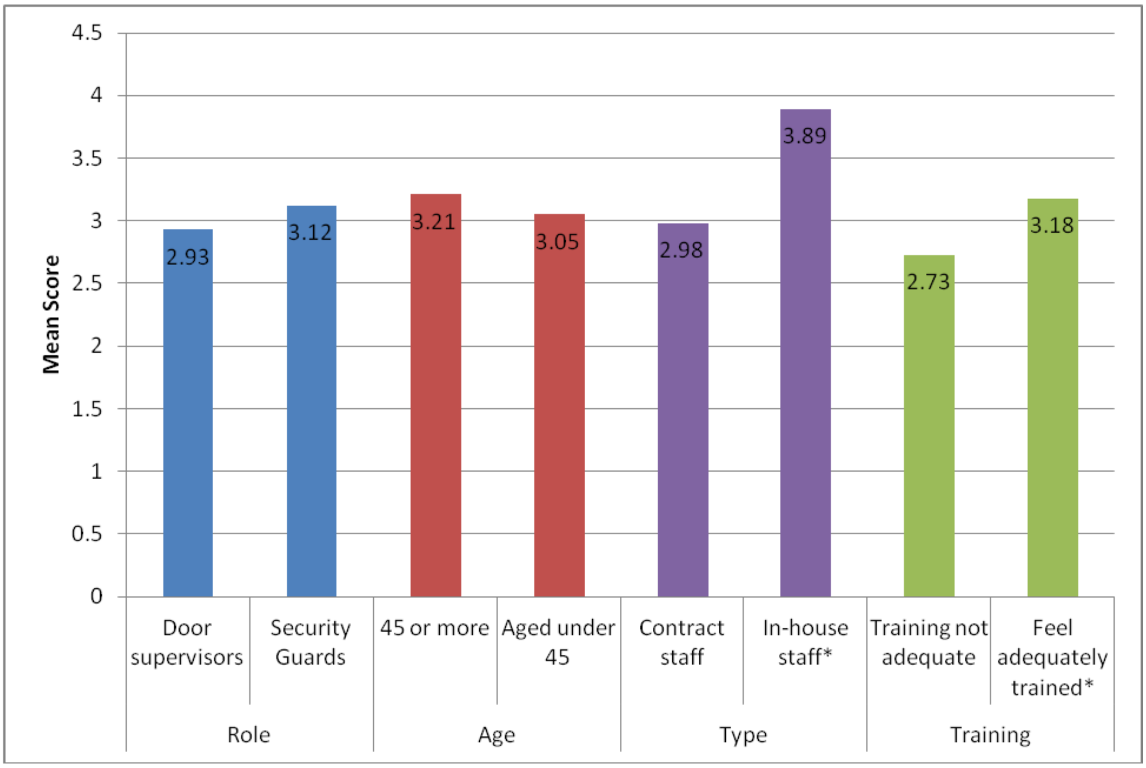
5.17 Younger operatives and those working as door supervisors were significantly more likely to think that turnover in the industry was high, while security guards were more likely to see it as lower. Contract - rather than in-house – workers were significantly more likely to consider company turnover to be high. As Figure 6 and Figure 7 show, those who considered themselves to be adequately trained were significantly less likely to feel that staff turnover was high on both criteria.

Figure 6: Means scores for operatives' perceptions of staff turnover in the security industry, on a scale of 1-5, where 1 means very high and 5 very low



*denotes that these differences are statistically significant

Figure 7: Mean scores for operatives' perceptions of staff turnover in their company on a scale of 1-5, where 1 means very high and 5 very low



*denotes that these differences are statistically significant

5.18 On a personal level, though, barely half (53.8%, n=234) felt sure they would be working in the security sector three years hence. Given their time in the industry at the time of the survey, this figure is surprisingly low. In fact, those who were newer to the industry were significantly less likely to think they would remain, as were those with better academic qualifications. In contrast, those who considered themselves adequately trained were significantly more likely to feel that they would continue working in security. This finding alone suggests that investment in training has considerable advantages for staff retention. There were no significant differences, though, between those working in different jobs.

5.19 Asked why people left security work, operatives broadly ranked the reasons in the same order as did directors/managers. However, they consistently cited more reasons than directors/managers and in every case the scale mean was lower (Table 26).

Table 26: Operatives' views about why people leave contract security work, on a scale of 1-5, where 1 means agree strongly and 5 disagree strongly (n=431 to 443)

Reason	Strongly Agree or Agree (1-2)	Mean
Poor pay	78.8%	1.84
Don't feel appreciated	77.2%	1.89

Limited opportunities for development	72.6%	2.03
Poor working environment	44.5%	2.63
The work is not interesting	42.5%	2.74
Insufficient training	33.1%	2.89
There is a risk of conflict/ violence	31.0%	3.00
Not very good at their job	30.2%	3.00

5.20 The most notable difference, though, was in the number citing the fact that operatives didn't feel appreciated, mentioned by over three quarters and with a scale mean 0.72 below managers. This was further illustrated when they were subsequently asked, 'While working as a security operative, how many times have you been recognised for achieving excellence in the last 2 years?' Half (50.1%, n=223) said they never had. Despite this, a majority (56.3%, n=251) considered their line manager to be an effective supervisor.

5.21 Nevertheless, like security directors/managers, lack of recognition, combined with poor pay and limited opportunities for development, stood out as the key reason for the high turnover. A plethora of verbatim comments on what was needed to improve morale underlined this:

> *My company goes on about loyalty and commitment but they seem to forget it works both ways.*
>
> *Appreciation from managers and employers.*
>
> *Good security officers should get more recognition for their hard work and dedication.*
>
> *Working in this industry need their rights to be looked after a little bit better. Basic human rights of the individual and working conditions need to be screened better and introduce measures to make sure that sick pay, pensions, career progression and awards and recognition are screened to make sure that they are happening. This would make the lives of the security officers more rewarding*
>
> *Investing more in training, reasonable pay, employees feeling that they are looked after by the employer.*
>
> *Terms and conditions are extremely poor throughout the industry, security officers are regularly expected to work additional hours with an overtime rate, employers expect employees to be available at a moments notice and use the fact that guards are easily replaced as a stick to encourage them to do so. Most security companies treat their employees as a disposable asset that is easily replaced.*

Too many students use the role as an opportunity to study and sleep whilst on duty (this is becoming more regular and is rarely even noticed by employers. Regulate the EMPLOYERS not the EMPLOYEES!

To feel more appreciated for the job you do.

Better training and support from the company, better encouragement and leadership from management and being treated with respect and not as a number.

Reduce the hours that are required to work to have a decent wage. 12 hour shifts with no breaks is really not on in this day and age but they need to be worked to get a good take home wage.

Pay a decent wage and reduce hours worked.

Substantial increase in basic pay, better training, company management not treating the role as simply a bum on a seat to cut insurance costs, legislation (being enforced) preventing security companies forcing employees to work constant 12 hour shifts or lose their jobs.

Recruit the right people for the role and then pay them a wage that does not demean them.

5.22 That said, 24.5% (n=110) thought that, for the area where they lived, the pay was above average, with 40.3% (n=181) considering it average and 33.9% (n=152) below average. The only significant difference here was that better qualified staff were most likely to see local pay as relatively poor.

5.23 While differences between operatives and directors/managers were evident, there were also significant differences *within* the security operative sample. Poor pay, for example, was cited most frequently by older and more experienced staff, those who considered their training inadequate, and operatives who carried out non-security functions. Inadequate training was also identified as especially relevant by long term operatives and those who considered themselves inadequately trained. And the same people, plus those working in-house, were significantly more likely to identify a poor working environment as a factor in high turnover.

5.24 In all, 31.0% (n=135) put high turnover down to the risk of conflict or violence, although in-house operatives and door supervisors were significantly more likely to cite this as a cause of high turnover. However, as Table 27 demonstrates, violence and intimidation were not perhaps as regular features of the working environment as might have been expected. In each case, around four in ten reported no such experiences and less than 5% said they were endemic features of their work. Interestingly, in-house operatives and door supervisors were particularly likely to identify the risk of conflict or violence as contributing to high turnover and they were also more likely to have experienced violence. Perhaps surprisingly, PSS operatives also reported significantly higher than average levels of aggression.

Table 27: Operatives' experiences of direct or indirect aggression in their work over the previous two years (n=445)

Type of aggression	Never	Sometimes	Regularly
Victim of direct aggression (E.g. been punched, slapped, screamed/cursed at)	40.8%	54.6%	4.5%
Victim of indirect aggression (E.g. had rumours spread or stories made up about you)	39.6%	52.9%	4.0%

5.25 Despite what might be considered some difficult working conditions, operatives clearly felt that the public image of security staff was low. Asked if they thought the public had a positive view of most people who worked in security, only 20.5% (n=92) agreed, whilst a majority (55.9%, n=251) disagreed. Those who considered themselves well trained were most likely to feel that the public held them in higher regard, but interestingly supervisors were significantly more likely to disagree. Many operatives also agreed that security rated low in their employers' priorities: nearly half (47.5%, n=208) felt security was a 'grudge purchase', albeit security guards were significantly less likely to concur.

5.26 Compared with this, their views on their colleagues were rather more positive. Despite the fact that three in ten felt that many operatives left because they weren't very good at their jobs (Table 26), 56.3% (n=252) were of the opinion that most of their colleagues were 'totally committed to providing a quality service' (compared with 21.0%, n=94, who disagreed). And a significant minority (40.8%, n=182) also felt that, 'Security personnel could successfully undertake most of the tasks undertaken by a police officer.' Security guards, whose work is perhaps more akin to that of the public police, were, however, significantly less likely to agree. Strikingly, door supervisors were significantly more likely to think they could replace the police! Whether such views are an overstatement or not, they add weight to the contrast between operatives' evaluations of themselves and their colleagues and their perceptions of how management and the general public see them.

5.27 Considering the largest three subcategories of those working as security operatives – security guards, door supervisors and PSS operatives – their views on their working environment were broadly similar. The most notable differences were for door supervisors. They were significantly more likely to feel that turnover in the security industry was high and that the threat of violence contributed to this. They were also significantly more likely to have experienced conflict, with 80.2% (n=69) saying they had been a direct victim of aggression within the previous two years and 68.8% (n=55) citing indirect aggression. While this may not be surprising, the fact that PSS operatives also recalled high levels of aggression is also notable.

Summary

5.28 Overall security operatives added to the swell of opinion that regulation is needed and that it should be extended to other areas, although there was concern about the immaturity of the sector to be able to cope without support. Interestingly some felt training could be improved (and felt strongly), and those that felt they were adequately trained often showed a more favourable view of their work and the work of the sector.

5.29 The findings added some insight behind the reasons for high turnover. Security operatives agreed with contract directors/managers about the reasons, and tended to feel even more strongly especially about not being treated very well. Indeed, they felt their work was insufficiently recognised by the companies they work for and the general public. They too felt that it was higher in the industry generally than the company they worked for (although those who were adequately trained felt this was less the case). To retain the services of security operatives more focus is going to be needed on engaging the newer recruits, and those who are better qualified, encouraging them not to view security work as a short-term job.

5.30 It is important not to see high turnover of staff in terms of the nature of the job in dealing with conflict (although this was more of an issue with door supervisors), and low pay. Indeed, as far as the latter is concerned nearly a quarter felt they were paid more than the average for the area where they worked, and a third felt that on these criteria it was below average. Pay is definitely an issue, but it is not the only one.

5.31 Just over a fifth felt that colleagues were not committed to their jobs, although over a half felt that colleagues were. This may add to the frustration that they did not feel their work was appropriately recognised.

Section 6. Security Guards, Door Supervisors & Public Space Surveillance Operatives

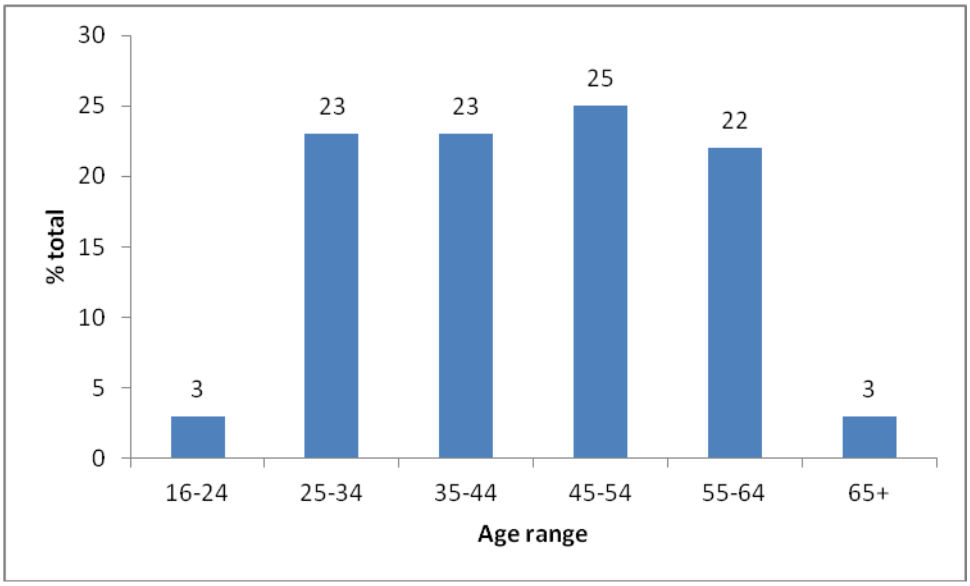
6.1 This section looks at responses provided by each of the three sectors separately. It provides a snapshot of each, given that some readers will be interested in the differences. In reality, this slightly oversimplifies the true picture, since some people (around 15%) specified more than one type of work as their main work. In what follows, whatever kind of work was given as the main work area was treated as such.

Security guards

6.2 87.8% of security guards (n=325) responding were male. The distribution by age is shown in Figure 1. A higher proportion of younger respondents were female[12], for example in the 25-34 age group 16.6% (n=84) were female. In contrast, only 5.5% (n=5) of those over 55 were women.

6.3 Figure 8 shows the age distribution of those whose main work is security guarding. The low numbers in the young age groups is striking.

Figure 8: Age of security guards (n=377)



6.4 In 61.3% (n=223) of cases the licensing fee was paid for by the employer. 53.7% (n=197) said they worked at operational level, 41.7% (n=153) at supervisory level. 80.5% (n=297) described themselves as contract workers, 11.9% (n=44) in house and 6.5% (n=24) as both.

[12] This was statistically significant.

6.5 56.6% (n=209) worked exclusively at one site, 23.8% (n=88) predominantly at one site, and the remainder at a number of sites. 97% (n=358) worked full-time. 59.6% (n=220) worked both nights and days, 33.6% (n=124) exclusively during the day. 83.7% (n=302) felt adequately trained for the job (but as will be noted later felt others were not). 7.6% (n=28) had one or more jobs in addition to their security work. Where such a job was held, it took an average of thirteen hours per week, with one quarter spending seven hours or less (n=5), and one quarter nineteen hours or more (n=5).

6.6 The average number of hours which security guards were rostered to work per week was 49, the average hours actually worked was 54. A quarter were rostered to work more than 54 hours per week, a quarter less than 42. A quarter actually worked more than 60 hours per week. The discrepancy between hours rostered and hours worked averaged five hours, with a quarter working nine or more hours over hours rostered.

6.7 The average respondent had worked twelve years in the security industry, with one quarter (n=90) having worked for five years or less, and one quarter for sixteen years or more (n=90). Almost half of respondents said they also carried out non-security related functions (49.7%, n=181).

6.8 When asked about staff turnover, the responses were as in Table 28.

Table 28: Perceptions of staff turnover

Rating	In security guarding sector (n=354)	In own company (n=324)
Very High	11.9%	6.8%
High	33.1%	21.3%
Neither High nor Low	24.3%	31.8%
Low	15.5%	18.5%
Very Low	10.5%	13.9%

6.9 When asked whether they would still be working in the sector in three years' time, 53.3% (n=185) said they would, 13.3% (n=46) said they would not, and 33.4% (n=116) were not sure. Interestingly, those who said they would not still be working in the sector in three years' time were those who had been, on average, longest in the job (16 years) with the least experienced saying they would still be in the job in three years (average of ten years' experience).[13]

[13] ANOVA with Student-Newman-Keuls multiple comparisons, F 2, 341 = 8.28, p<.05. p<.01.

6.10 When asked why people leave security work, the answers were as in Table 29. Entries are percentage agreement or strong agreement with reason in left column.

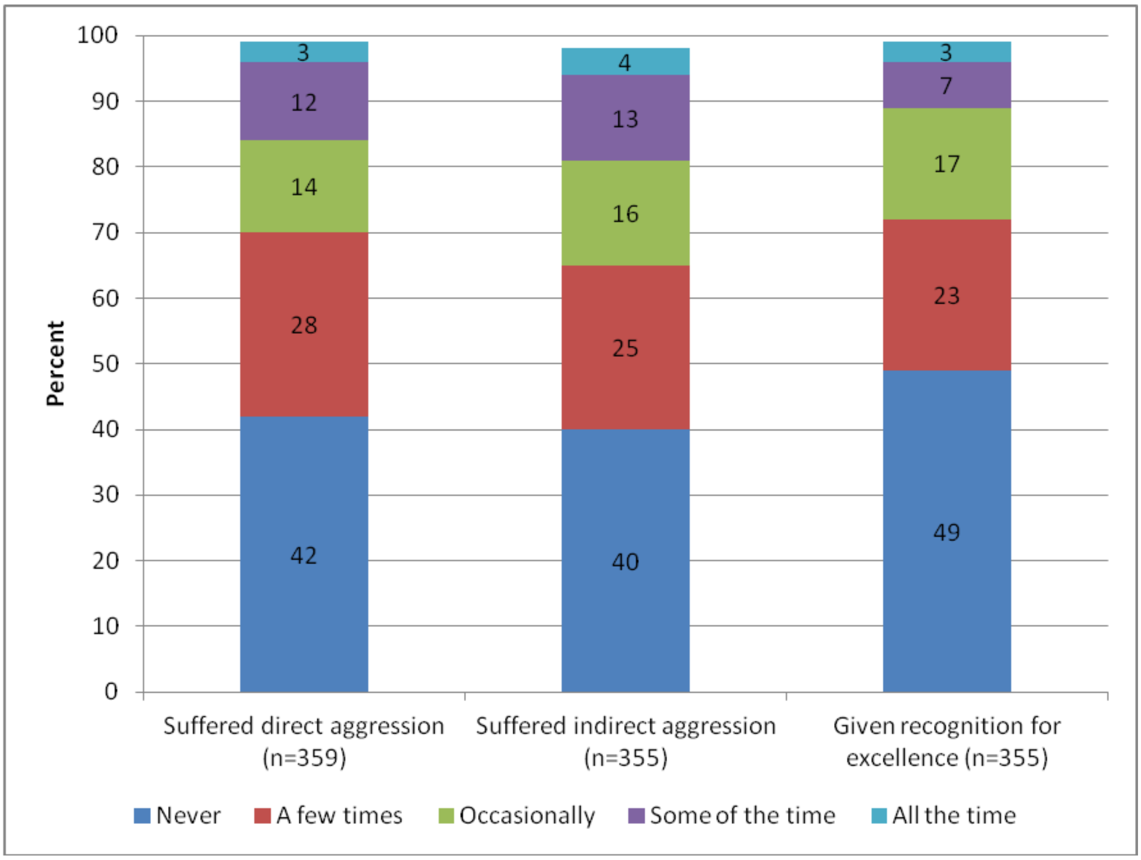
Table 29: Inferred reasons for leaving security work

Reason for leaving	Agree or Strongly agree (1-2)	N of cases
Because pay is poor	78.0%	350
People don't feel appreciated	76.3%	351
Limited opportunities for development	72.0%	346
Working environment is poor	43.8%	345
Work is not interesting	44.1%	340
Training is insufficient	32.8%	341
People are not very good at the job	29.4%	339
Risk of conflict/violence	27.0%	345

6.11 24.3% (n=87) of responding security guards believed their pay to be above average for the area in which they lived, 41.9% (m=150) average, and 32.1% (n=115) below average. 53.9% (n=193) disagreed or strongly disagreed with the assertion that the public has a positive view of most people who do security work. 21.3% (n=76) agreed with the assertion, and 24.6% (n=88) neither agreed nor disagreed. 56.3% (n=201) agreed or strongly agreed with the assertion that 'most of my colleagues are totally committed to providing a quality service'. 21% (n=75) disagreed or strongly disagreed, the remainder being neutral (n=80). 55.8% (n=198) saw supervision by their line manager as effective or very effective. 18.6% (n=66) saw it as ineffective or very ineffective, the remainder being neutral (n=87). 38.7% (n=137) agreed or strongly agreed with the claim that security personnel could successfully undertake most of the tasks carried out by police officers. An equal proportion (39.6%, n=140) disagreed or strongly disagreed, the remainder being neutral (n=74).

6.12 Asked about their experience of direct or indirect aggression, or recognition for excellence, in the last two years, the answers are set out in Figure 9.

Figure 9: Experience of direct and indirect aggression, and recognition for excellent work



6.13 Table 30 shows percentage agreement or strong agreement with regulation of organisations working in certain areas of the industry.

Table 30: Agreement with regulation of certain sectors

Sector	Agree or Strongly agree (1-2)	N of cases
Installing security equipment	85.3%	347
Manufacturing security equipment	72.1%	345
Private/commercial detective work	87.6%	348
Security consultancy	87.9%	347

6.14 Table 31 sets out the perceived aims and consequences of regulation, and other miscellaneous views of the security industry.

Table 31: Perceived aims of regulation and miscellany

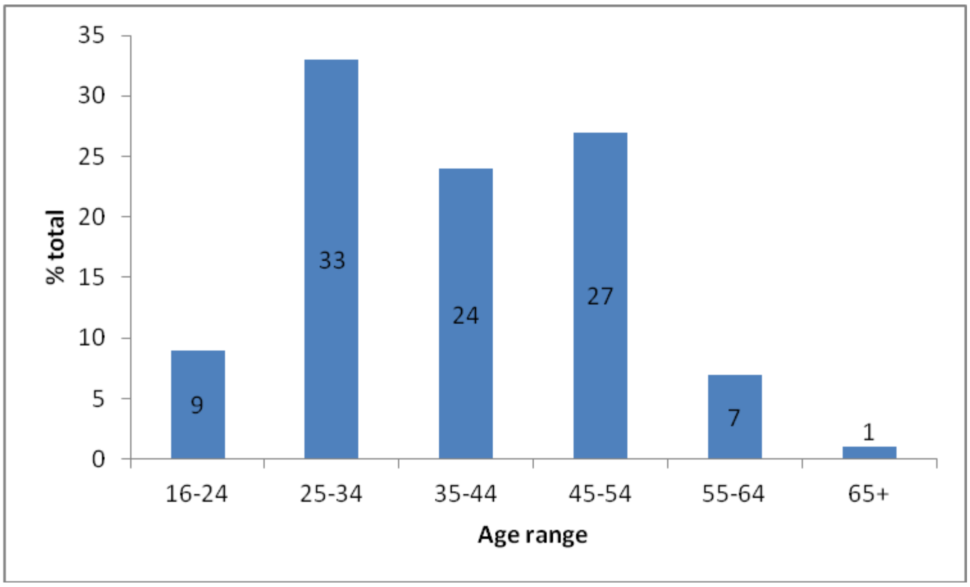
	Agree or Strongly agree (1-2)	N of cases
Development of minimum standards	92.8%	350
To keep people safe	88.0%	349
Directors of security companies, including shadow directors, should be subject to fit and proper persons tests	93.7%	349
Licensing organisations effectively will increase confidence in the security sector	74.9%	350
Security sector sufficiently mature to manage aspects of its own regulation	40.1%	349
Security is a grudge purchase	47.0%	349

6.15 Security guards then often worked in sometimes trying circumstances in that they occasionally suffered aggression, the work was often uninteresting, and they rarely received recognition for their work, and the high turnover is the cause of much dissatisfaction amongst some workers, close to a third felt there pay was below average for the area they worked in (although the remainder felt it was average or better). That a significant minority had to pay for their own licence is telling. It is a striking finding that many who have been guards for a long time do not necessarily see it as a permanent job going forward. Not that many had other jobs, in fact only a few did, but they worked long hours, that a quarter were rostered to work over 54 hours and a quarter worked over 60 hours is telling. Many undertook a variety of duties beyond just security. They were generally positive about regulation although less so about the maturity of the sector to manage its own regulation.

Door supervisors

6.16 90.2% (n=83) of door supervisors responding were male. The distribution by age is shown in Figure 10. Figure 10 shows the age distribution of those whose main work is door supervision, and one again according to this sample door supervision work is neither a young persons or older persons job.

Figure 10: Age of door supervisors (n=93)



6.17 In 29.3% (n=27) of cases the licensing fee was paid for by the employer, in 66.3% (n=61) of cases by the respondent. 46.2% (n=42) said they worked at operational level, 48.4% at supervisory level (n=44). 59.8% (n=55) described themselves as contract workers, 13% (n=12) in house and 26.1% both (n=24).

6.18 35.9% (n=33) worked exclusively at one site, 30.4% (n=28) predominantly at one site, and the remainder at a number of sites (n=29). 79.1% (n=72) worked full-time. 57.6% (n=53) worked both nights and days, 25% (n=23) exclusively during the day. 84.3% (n=75) felt adequately trained for the job. 20.7% (n=19) had one or more jobs in addition to their door work. Where such a job was held, it took an average of twenty-eight hours per week, with one quarter spending sixteen hours or less (n=4), and half (n=8) thirty-three hours or more.

6.19 The average number of hours which door supervisors were rostered to work per week was 42, the average hours actually worked was 48. A quarter were rostered to work more than 48 hours per week, a quarter less than 37 . A quarter actually worked more than 60 hours per week. The discrepancy between hours rostered and hours worked averaged five hours, with a quarter working twelve or more hours over hours rostered. The average respondent had worked nine years in the security industry, with one quarter having worked for four years or fewer (n=27), and one quarter for fourteen years or more (n=26). Almost half (47.7%, n=42) of respondents said they also carried out non-security related functions.

6.20 When asked about staff turnover, the responses were as in Table 32.

Table 32: Perceptions of staff turnover (%)

Rating	In security sector (n=85)	In own company (n=84)
Very High	23.5%	19.0%
High	34.1%	15.5%
Neither High nor Low	24.7%	27.4%
Low	8.2%	22.6%
Very Low	5.9%	11.9%

6.21 When asked whether they would still be working in the sector in three years' time, 59% (n=49) said they would, 9.6% (n=8) said they would not, and 31.3% (n=26) were not sure.

6.22 When asked why people leave security work, the answers were as in Table 33. Entries are percentage agreement or strong agreement with reason in left column.

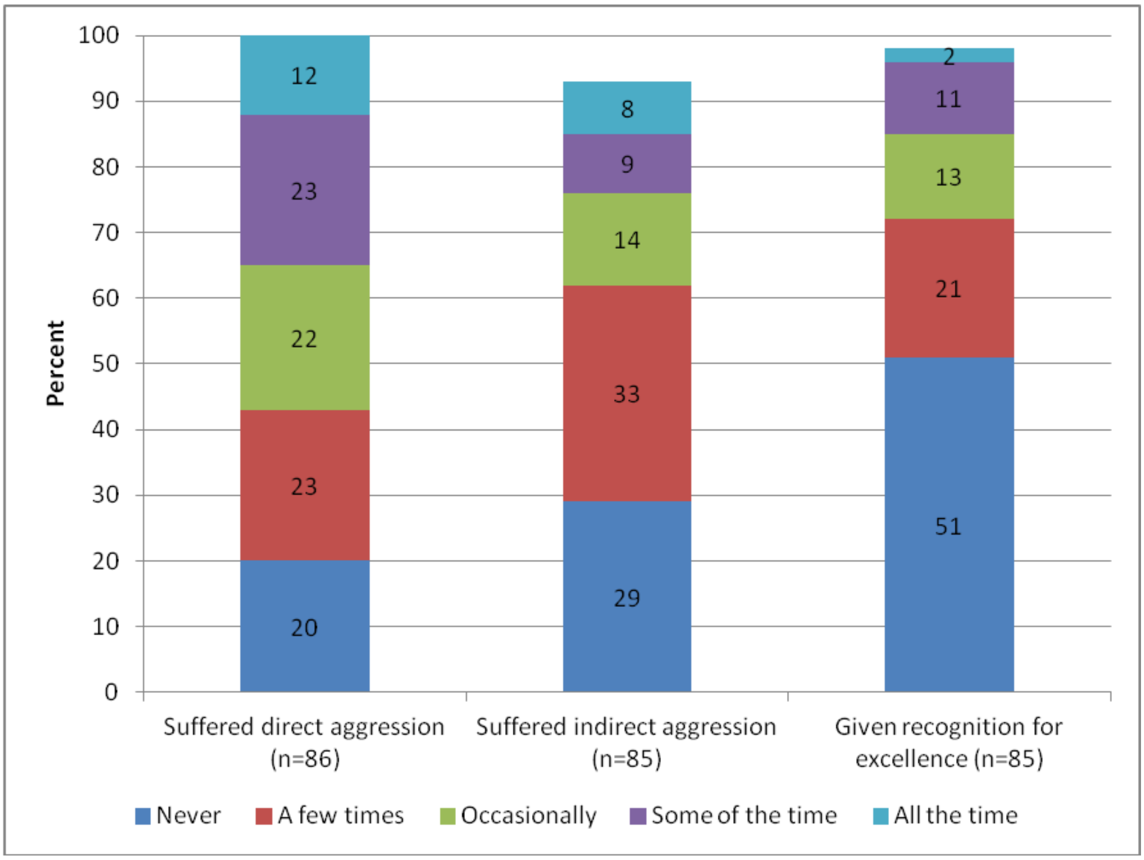
Table 33: Inferred reasons for leaving security work

Reason for leaving	Agree or Strongly agree (1-2)	N of cases
Because pay is poor	75.6%	86
People don't feel appreciated	70.9%	86
Limited opportunities for development	70.2%	84
Working environment is poor	45.9%	85
Risk of conflict/violence	42.4%	85
People are not very good at the job	37.3%	86
Work is not interesting	36.9%	84
Training is insufficient	30.6%	85

6.23 20% (n=17) of responding door supervisors believed their pay to be above average for the area in which they lived, 36.5% (n=31) average, and 43.5% (n=37) below average. 59.3% (n=51) disagreed or strongly disagreed with the assertion that the public has a positive view of most people who do security work. 22.1% (n=19) agreed with the assertion, and 18.6% (n=16) neither agreed nor disagreed. 52.3% (n=45) agreed or strongly agreed with the assertion that 'most of my colleagues are totally committed to providing a quality service'. 23.2% (n=20) disagreed or strongly disagreed, the remainder being neutral (n=20). 69.8% (n=70) saw supervision by their line manager as effective or very effective. 12.8% (n=11) saw it as ineffective or very ineffective, the remainder being neutral (n=15). 50.6% (n=44) agreed or strongly agreed with the claim that security personnel could successfully undertake most of the tasks carried out by police officers. A smaller proportion (34.4%, n=30) disagreed or strongly disagreed, the remainder being neutral (n=13).

6.24 Asked about their experience of direct or indirect aggression, or recognition for excellence, in the last two years, the answers are set out in Figure 11.

Figure 11: Experience of direct and indirect aggression, and recognition for excellent work



6.25 Table 34 shows percentage agreement or strong agreement with regulation of organisations working in certain areas of the industry.

Table 34: Percentage agreement with regulation of certain sectors

Sector	Agree or Strong agree (1-2)	N of cases
Installing security equipment	83.3%	84
Manufacturing security equipment	68.7%	83
Private/commercial detective work	85.9%	85
Security consultancy	83.3%	84

6.26 Table 35 sets out the perceived aims and consequences of regulation, and other miscellaneous views of the security industry.

Table 35: Perceived aims of regulation and miscellany

	Agree or Strongly agree (1-2)	N of cases
Development of minimum standards	88.1%	84
To keep people safe	89.2%	83
Directors of security companies, including shadow directors, should be subject to fit and proper persons tests	85.9%	85
Licensing organisations effectively will increase confidence in the security sector	73.8%	84
Security sector sufficiently mature to manage aspects of its own regulation	44.0%	84
Security is a grudge purchase	44.0%	84

6.27 The majority worked full time, but over a fifth had another job. A quarter worked more than 60 hours per week, and about a half said they normally carried out non security functions. Just 10 per cent said they would not be working in the sector in 10 years time, although many were unsure. The sample felt people left because of a lack of appreciation and limited development opportunities.

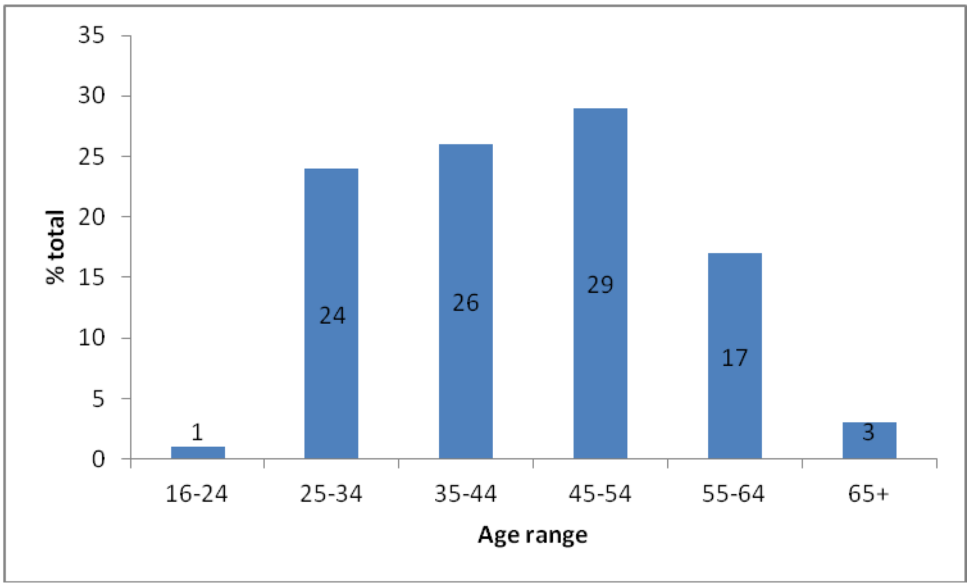
6.28 Poor pay also featured and 44 per cent felt that were paid less then the average for the area they lived in, and two thirds paid for their own licence. Moreover, most suffered aggression, at least a few times. While they generally agreed with regulation, they doubted the security sector was sufficiently mature to manage its own regulation.

Public space surveillance

6.29 87.8% (n=72) of those whose main activity was public space surveillance were male. The distribution by age is shown in Figure 3.

6.30 Figure 12 shows the age distribution (%) of those whose main work is public space surveillance.

Figure 12: Age of public space surveillance operatives (n=86)



6.31 More than half (61.2%, n=52) stated their license fee was paid for by the employer. 50% (n=43) said they worked at operational level, 47.7% (n=41) at supervisory level. 73.6% (n=64) described themselves as contract workers, 14.9% (n=13) in house and 10.3% (n=9) both.

6.32 73.6% (n=64) worked exclusively at one site, 10.3% (n=9) predominantly at one site, and the remainder at a number of sites (n=13). 93.1% (n=81) worked full-time. 66.7% (n=58) worked both nights and days, 29.9% (n=26) exclusively during the day. 83.3% (n=70) felt adequately trained for the job. 9.2% (n=8) had one or more jobs in addition to their security work. Where such a job was held, it took an average of twelve hours per week, the number of cases here being too small to analyse further.

6.33 The average number of hours which public space surveillance staff were rostered to work per week was 46, the average hours actually worked was 49. A quarter were rostered to work more than 48 hours per week, a quarter less than 46. A quarter actually worked more than 56 hours per week. The discrepancy between hours rostered and hours worked averaged three hours, with a quarter working seven or more hours over hours rostered. The average respondent had worked twelve years in the security industry, with one quarter having worked for six years or less (n=22), and one quarter for fifteen years or more (n=24). Over half of respondents (56.5%, n=48) said they also carried out non-security related functions.

6.34 When asked about staff turnover, the responses were as in Table 36.

Table 36: Perceptions of staff turnover (%)

Rating	In sector (n=81)	In own company (n=73)
Very High	17.3%	8.2%
High	35.8%	23.3%
Neither High nor Low	22.2%	28.8%
Low	12.3%	23.3%
Very Low	8.6%	11.0%

6.35 When asked whether they would still be working in the sector in three years' time, 53.2% (n=42) said they would, 12.7% (n=10) said they would not, and 34.2% (n=27) were not sure.

6.36 When asked why people leave security work, the answers were as in Table 37. Entries are percentage agreement or strong agreement with reason in left column.

Table 37: Inferred reasons for leaving security work

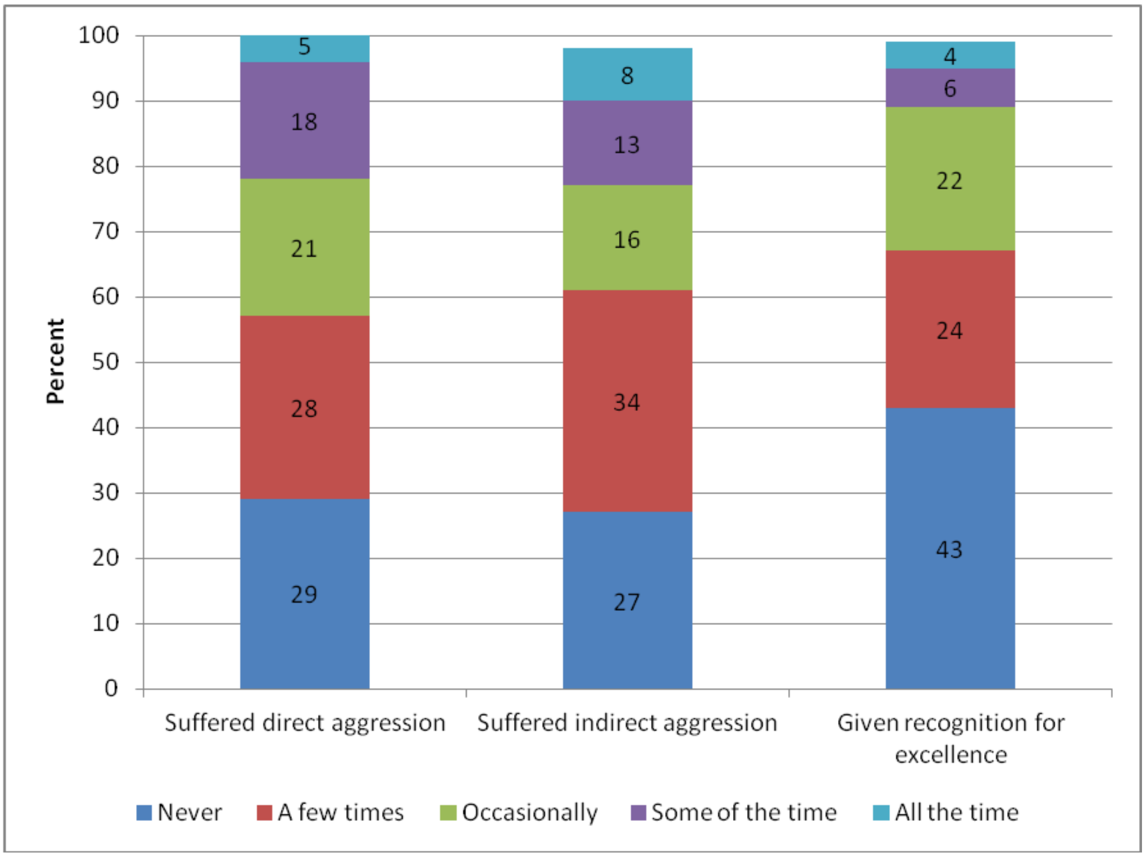
Reason for leaving	Agree or Strongly agree (1-2)	N of cases
People don't feel appreciated	84.1%	82
Because pay is poor	74.7%	83
Limited opportunities for development	67.9%	78
Work is not interesting	46.2%	78
Working environment is poor	42.5%	80
Risk of conflict/violence	34.2%	79
Training is insufficient	33.3%	78
People are not very good at the job	27.8%	79

6.37 26.5% (n=22) of responding public space surveillance operatives believed their pay to be above average for the area in which they lived, 39.8% (n=33) average, and 32.5% (n=27) below average. 61.5% (n=51) disagreed or strongly disagreed with the assertion that the public has a positive view of most people who do security work. 18.1% (n=15) agreed with the assertion, and 20.5% (n=17) neither agreed nor disagreed. 55.4% (n=46) agreed or strongly agreed with the assertion that 'most of my colleagues are totally committed to providing a quality service'. 27.7%

(n=23) disagreed or strongly disagreed, the remainder being neutral (n=14). 57.8% (n=48) saw supervision by their line manager as effective or very effective. 16.8% (n=14) saw it as ineffective or very ineffective, the remainder being neutral (n=21). 45.8% (n=38) agreed or strongly agreed with the claim that security personnel could successfully undertake most of the tasks carried out by police officers. A smaller proportion (35%, n=29) disagreed or strongly disagreed, the remainder being neutral (n=15).

6.38 Asked about their experience of direct or indirect aggression, or recognition for excellence, in the last two years, the answers are set out in Figure 13.

Figure 13: Experience of direct and indirect aggression, and recognition for excellent work (n=83)



6.39 Table 38 shows percentage agreement or strong agreement with regulation of organisations working in certain areas of the industry.

Table 38: Agreement with regulation of certain sectors

Sector	Agree or Strongly agree (1-2)	N of cases
Installing security equipment	83.8%	80
Manufacturing security equipment	70.5%	78
Private/commercial detective work	92.4%	79
Security consultancy	91.1%	79

6.40 Table 39 sets out the perceived aims and consequences of regulation, and other miscellaneous views of the security industry.

Table 39: Perceived aims of regulation and miscellany

	Agree or Strongly agree (1-2)	N of cases
Development of minimum standards	96.3%	81
To keep people safe	90.0%	80
Directors of security companies, including shadow directors, should be subject to fit and proper persons tests	95.0%	80
Licensing organisations effectively will increase confidence in the security sector	74.1%	81
Security sector sufficiently mature to manage aspects of its own regulation	46.9%	81
Security is a grudge purchase	40.7%	81

6.41 In nearly 6 out of 10 cases the licence fee was paid for by the employer. A quarter worked more than 56 hours per week. Only 13% said they would not be working in the industry in three years time, although a third were not sure. Poor pay was a cause of concern for some and cited as a main reason for leaving the job. Indeed, a third felt they were paid less than the average for the area they lived in. Limited opportunities for development, and a lack of appreciation for what they did also featured prominently. These operatives were not free from suffering aggression at least a few times. They also supported the main aims of regulation, and felt that the sector was insufficiently mature to manage at some aspects of regulation.

Section 7. Discussion

Context

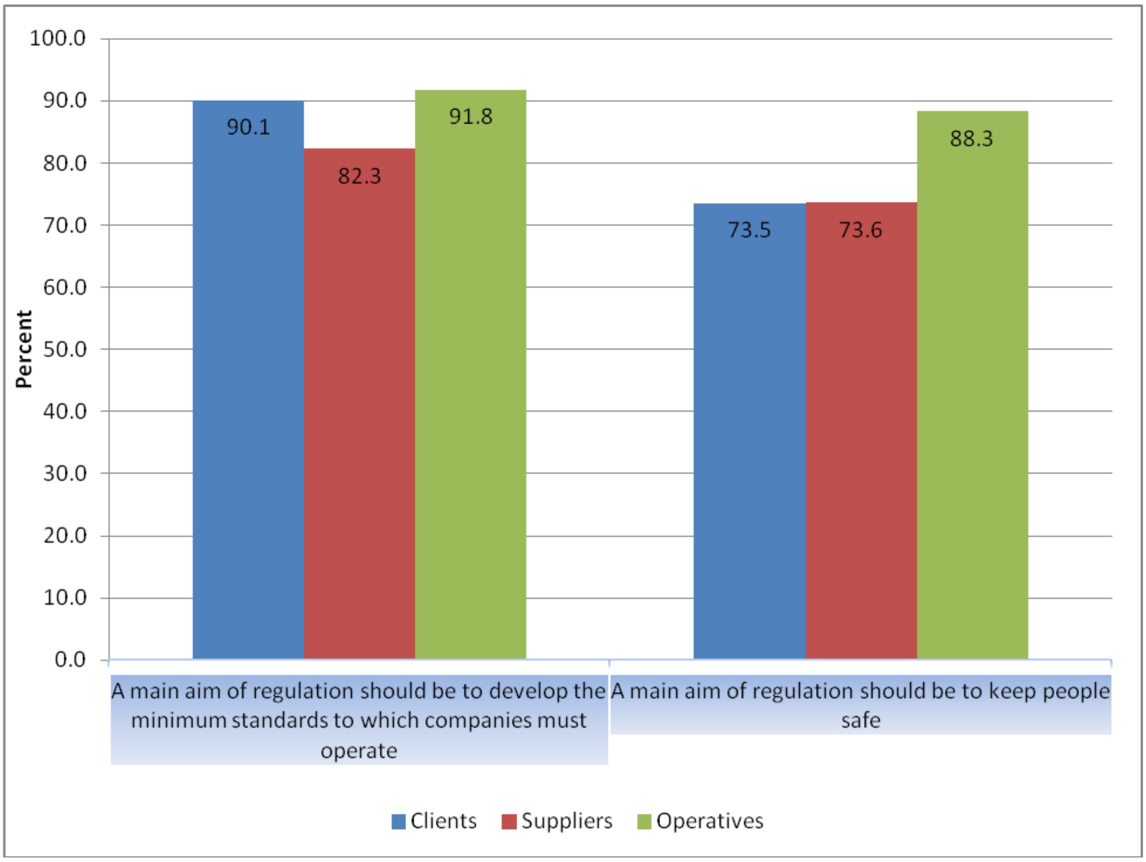
7.1 This study provides details of those working with/within the industry. Different questions were directed, as appropriate, at the three samples, although some overlapped. Together they offer a perspective of the social, political and economic context within which private security operates.

Inspection and regulation of the security sector

7.2 The need for sufficient, and sufficiently robust, inspection and regulation is a core concern, both within the wider community and within the security industry. Yet both clients and suppliers expressed doubts about the current system.

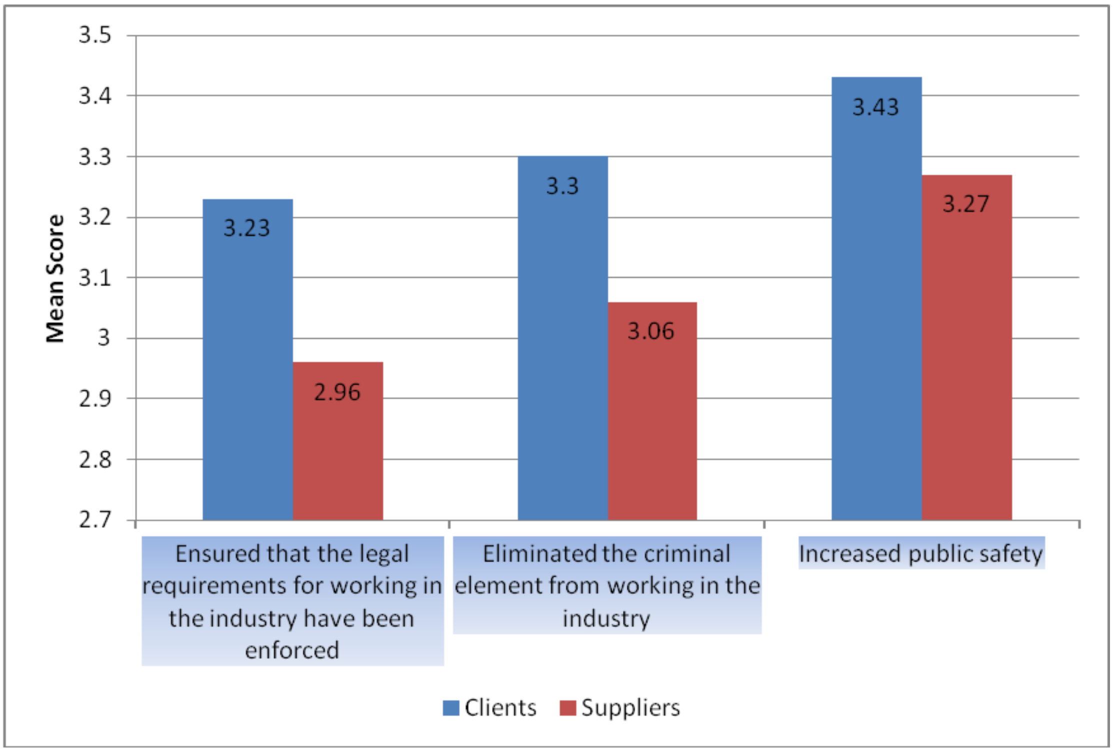
7.3 While there were differences in emphasis, a large majority of each sample agreed that the main aims of regulation included both developing minimum standards to which companies must operate and the need to keep people safe (Figure 14).

Figure 14: Percentage of clients, suppliers and operatives who agreed with the following aims of regulation



7.4 However, asked about the success of the SIA, as Figure 15 illustrates, the views of clients and directors/managers were less enthusiastic, with clients especially sceptical.

Figure 15: Clients' and suppliers' mean views of the success of the SIA on a five point scale where 1 indicates that the SIA had been successful and 5 unsuccessful

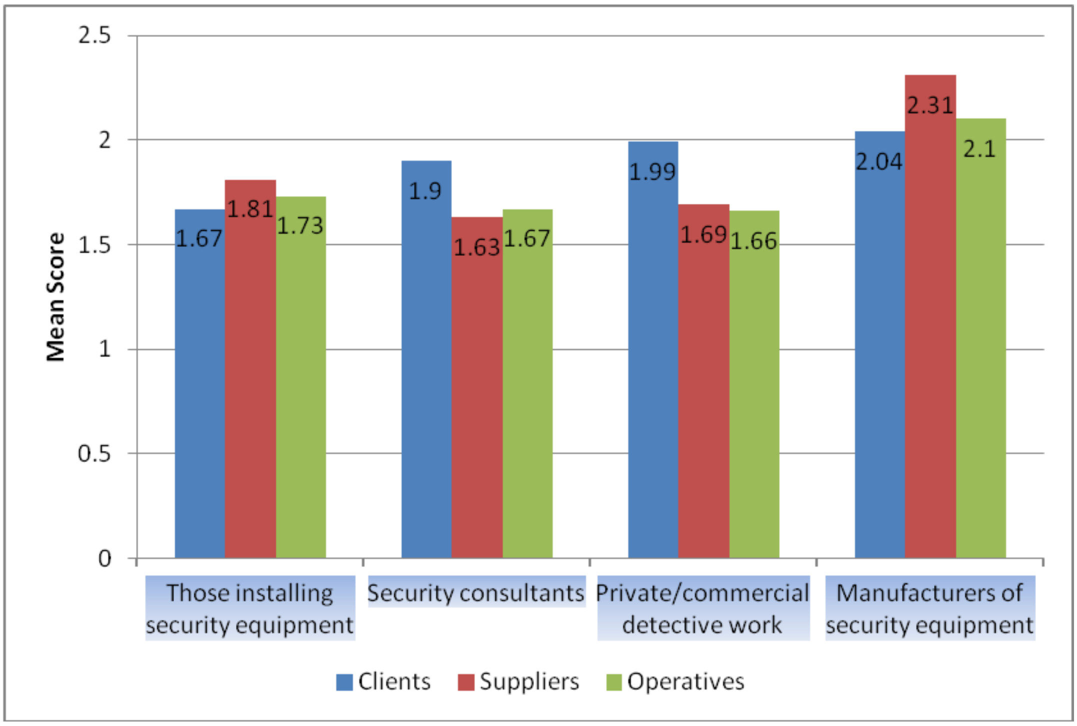


7.5 Asked directly, almost three quarters (73.4%) of suppliers agreed that the key to the success of a security regulator is the effectiveness of its enforcement regime. However, views were mixed on whether the inspection procedures for the Approved Contractor Scheme were weak, with 27.0% feeling that they were and 26.5% disagreeing. If the new Hallmark is to be based on the principles of the ACS there are clearly lessons that need to be learned.

7.6 Most of those asked felt that it was important for the security industry to be involved in the regulatory process, but equally that outside scrutiny was crucial. For example, 72.9% of clients and 86.3% of suppliers felt that it was important that representatives from the security sector should sit on the council of the regulatory body. And 54.0% and 69.2% respectively agreed that business licensing should provide considerable autonomy to security companies to deploy staff and be responsible for them. But less than a quarter of clients and only around two fifths of suppliers and operatives considered the security sector sufficiently mature to manage aspects of its own regulation. Similarly, around nine tenths of each sample thought that all directors of security companies, including shadow directors, should be subject to a 'fit and proper persons' check.

7.7 As Figure 16 illustrates, there was also widespread agreement that four aspects of the security industry not currently regulated – installers and manufacturers of security equipment, private/commercial detectives and security consultants – should be regulated.

Figure 16: Views on whether there should be regulation of the following organisations, on a scale of 1-5, where 1 means agree strongly and 5 disagree strongly



7.8 When asked, clients (85.7%) and security directors/managers (78.7%) were also firmly committed to the introduction of hallmarks for the industry, in each case expressing a preference for a scaled award scheme rather than one benchmark.

7.9 Overall, there was considerable support for the principle of licensing and for the engagement of the private sector in it, albeit that some had reservations about too much independent action or action not guided by a worthwhile enforcement/inspection regime.

Evaluating quality

7.10 The need for more comprehensive and stronger regulation needs to be viewed in the context of clients' assessments of the quality of the goods and services they purchased. In this respect their views were mixed.

7.11 On the one hand, asked about the security services they had used, their responses were largely positive. Nevertheless, they distinguished between different parts of the industry, and in-house services were consistently preferred to contract services.

7.12 Moreover, their opinions on a range of issues concerned with security installation and guarding revealed significant doubts about the state of these industries. They rarely felt security installers or security guarding companies exceeded expectations, and rejected the suggestion that they were ‘experts in their field’. Additionally, although they considered security guarding companies trustworthy albeit they felt they were poorly managed.

Staffing

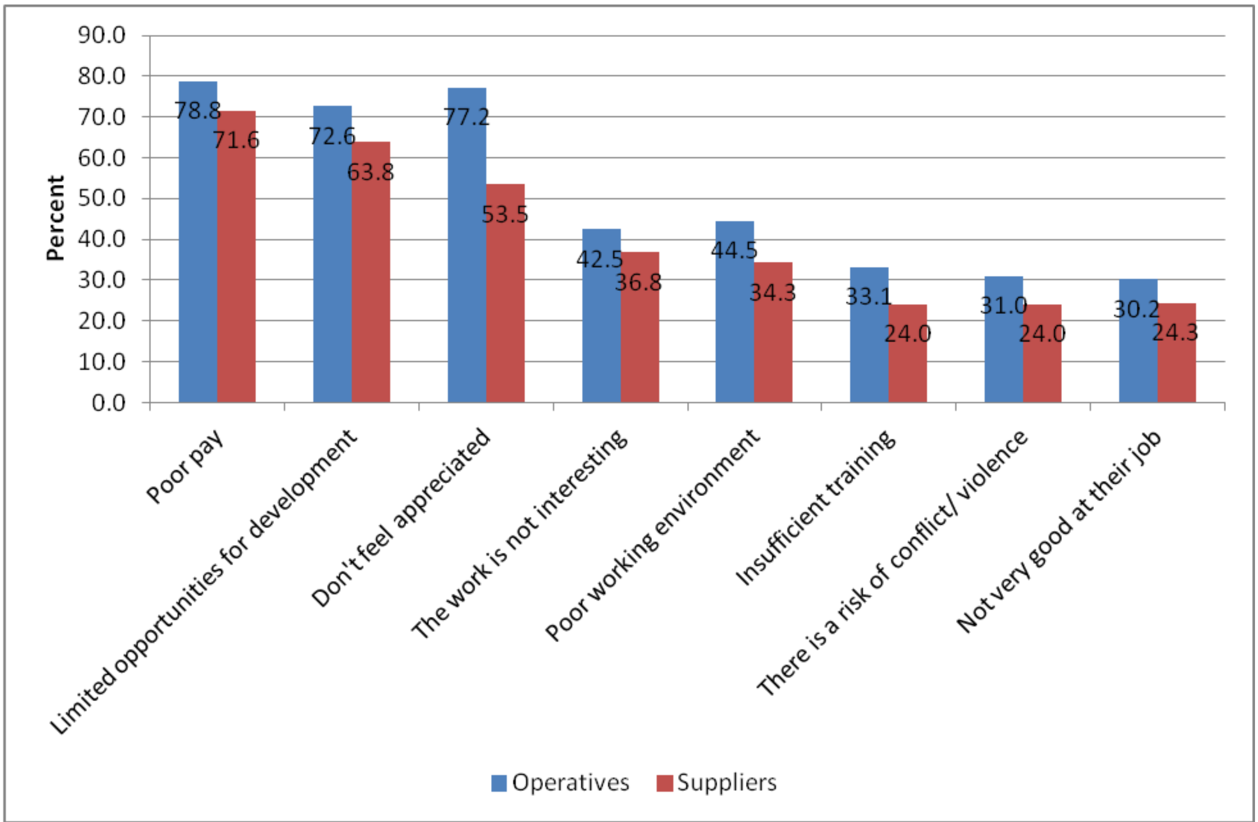
7.13 One further aspect of the quality of services relates to staff. In general, both clients and security directors/managers felt that operatives were adequately trained. However, this was less true of security guards, with nearly half of clients and a third of directors/managers thinking that more training was needed, and a significant minority also felt that door supervisors also required more training. These feelings reflected the widely held view that training was especially important for those dealing with conflict and violence. But both clients and security directors/managers were also sceptical of the suggestion that, ‘For some tasks (e.g. those that do not involve public contact) the level of training required should be left to the licensed company rather than the regulator,’ further evidence of the reservations some had about security companies being able to act independently.

7.14 Most security operatives (82.9%) also thought themselves adequately trained for their security work. Those who considered themselves adequately trained were most likely to feel that they would continue working in security.

7.15 In this context, staff turnover is clearly a problem that is widely recognised. Both security directors/managers and operatives felt that it was high in the industry, although the former were less willing to concede that it was high in their company. Additionally, despite the fact that many of the operatives responding to the survey had worked in the industry for a number of years, barely half (53.8%) thought they would be working in the security sector in three years time.

7.16 Both security directors/managers and operatives were asked why turnover was high. Figure 17 demonstrates that they tended to agree on the main reasons, citing especially poor pay, lack of recognition, and limited opportunities for development, although operatives consistently cited more reasons than managers and in every case the scale mean was lower. Notably, here and elsewhere it appeared that security operatives felt their efforts went unrecognised and unappreciated by both management and the wider public.

Figure 17: Suppliers' and operatives' views about why people leave contract security work in the area of security they were engaged in, on a scale of 1-5, where 1 means agree strongly and 5 disagree strongly



Financial perspectives on private security

7.17 In the current economic climate in particular, financial issues underpin any efforts to expand or improve the security industry. In this respect two findings are striking. The first is that over half of clients (53.1%) agreed that, 'Private security adds value to our business,' and few disagreed. So despite the criticisms that are levelled at private security companies the overriding impression is a positive one. Against this, and a finding that may perhaps explain the negative attitudes to some aspects of security, a large percentage of clients (42.8%), and even more security managers (50.9%) and operatives (47.5%) felt that security was 'a grudge purchase'.

7.18 In this context, clients were asked about their purchasing decisions in the recent past and immediate future. In terms of changes to the amount spent on security their views were mixed: 31.1% said that their company's security budget had been reduced in the previous 2 years, but slightly more (35.8%) said it had increased. Correspondingly, considerably more (29.1%) felt that in the adverse economic climate their company's security function was more highly valued than disagreed (11.9%).

7.19 Nevertheless, compared with other mainstream functions within the company, they conceded that security was low priority. That procurement was seen as more significant may help explain why their assessments of future spending were relatively pessimistic.

7.20 Allied to this, their perceptions of the balance between alternative security options were notable. Congruent with the feeling that contract services offered better value, they felt that the budget for contract security work had increased more than for in-house security. Given, that in-house security was generally considered preferable to contract security, this suggests that costs have been cut to the detriment of quality unless additional safeguards are built into new contracts being offered. This chimes with their acceptance (by 64.9%) that, ‘Low margins change the focus of contract security managers from security to cost control.’

7.21 Additionally, clients also described a shift in spending in the past two years from security guards to equipment and felt this trend would continue in the immediate future.

7.22 It is somewhat ironic that buyers of security, who determine what price is paid for the service they are buying, and therefore the level of quality they seek, should on the one hand recognise that the service offers good value and on the other draw attention to poor pay of staff and levels of management competence, both of which they can to some extent at least manage.

7.23 Perhaps the main conclusion from this work is that within organisations security management is facing a challenging time. Costs feature prominently in all major decisions about the purchase of security and the status of security managers overall is below that of other key business functions: not always, it varies, but on this evidence, it is most often the case. This is perhaps why they lament the lack of pay of staff in private security companies, recognising that it undermines good service but they do not have the clout within their own organisations to persuade them to spend enough to make a difference. The private security sector may well need to play a leading role in influencing practices amongst buyers.

7.24 Within private security companies there are concerns about the approach of buyers. They recognise security is often a grudge purchase and the implications are that costs win over quality and profits for security companies and service for clients suffer. This needs to be managed. They agreed with operatives that staff turnover was high, albeit that it was less so in their own company, and this agreement on cause is a good foundation for improving the lot of operatives. While there may well be things companies can do, if there are cost implications, and there almost certainly will be, then they will need to engage clients.

7.25 Perhaps the most challenging finding is that high turnover of operatives is not about to stop; too many are planning to leave in the next three years for this threat to be ignored.

7.26 The security sector is not in a poor state, but there is a cloud hanging over its future that needs to be addressed. This will need clients, suppliers, both management and operatives to work together to deliver solutions to the benefit of them all, and thereby the industry. There does not appear to be an effective alternative to very thoughtful collaborative venture raising awareness of what you get from good security that you don’t get from bad, and showing, via examples, how you achieve this cost effectively. Those that do this meaningfully have a lot to gain.

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Appendix One: Methodology and Sample

The approach

There have been several studies of the security sector, although relatively little in recent times that involved a national sample, focussed on working conditions in the sector, and sought views what statutory regulation should look like in an era where this is under consideration. The process began by reviewing relevant literature on studies of security following literature searches using a variety of social science databases. Contact was made with senior researchers in this country and abroad to identify unpublished studies, and later to identify key issues or questions that should be included.

To better understand the types of issues that merited coverage in the survey and specifically the ones that should be prioritised (inevitably there were too many), two group discussions were held, one in the UK with the Members of the Security Research Initiative and one in the USA with a small group of members of Chief Security Officers (CSO) Roundtable. These were supplemented by a range of discussions, formally and informally, with representatives from the security world.

To better understand the potential direction of regulation, and some of the issues that were likely to emerge, four interviews were conducted with individuals actively involved in regulation, either of the security sector outside England, or of another business activity altogether. Some of the key issues that emerged included:

- The link between the amount of regulation and the level of risk to the public; those involved in less risky activities may be given a lighter touch of regulatory oversight;
- The merits of differentiation between businesses via a quality mark scheme, and the pros and cons of creating levels of kite marks within that (e.g. gold, silver, bronze);
- The number and types of licences needed for businesses, individuals (including operatives and directors/managers working in different activities);
- The process of raising standards on an going basis;
- The merits of a regulator protecting vulnerable parts of the sector with special provisions;
- The ways in which companies avoid regulation, by, for example, liquidating just before censure and then restarting work under different owners (sometimes related to the original ones), or ‘rogues’ and criminals running the business but from a distance;
- The provision of different sanctions to force compliance and punish non compliance;
- The value of and process for naming and shaming non compliant companies;

- Whether the key principles of regulations should include, for example, ensuring legitimate businesses prosper; or helping to create an elite group of high quality companies;
- The allocation of costs for regulation, between individual and business, and between those who comply completely and those who do not.

In the event, not all issues could be covered but these points provided a helpful reference point. Questionnaires were drafted, sent to different groups to check that the key points were covered and that the questions made sense. Then each of the questionnaires was piloted on line. Only then were the survey instruments placed on Survey Monkey.

The samples

As noted earlier, three samples were selected:

1. Those who buy/manage security services for the organisation that employs them. These are mostly security specialists but includes some who work in procurement and some who are facilities managers where security is only a part of their responsibilities.
2. Those who work as directors/managers in contract security companies. These were mostly focused on providing manned guarding services, although a significant minority were involved with security equipment.
3. Those who work as security operatives, mostly guarding, but includes those who specialize in public surveillance work and door supervisors.

The samples were selected via a variety of routes. Unfortunately there are no databases that contain details of all security personnel from which to draw a sample. Even in the regulated sector, the licensing authority does not have a usable database of officers that are licensed since they have to opt in to be included in mailings and only a minority do so (personal communication).

To select the three samples the following outlets were used: the main security media were asked to advertise the study and the key publications did so, sometimes including details in the publications and on their website too; the representative and membership associations were asked to notify members and again the key ones did so, indeed the BSIA invited its members to participate and encouraged them to involve colleagues; the SIA advertised the study and invited participation via its website and by including a feature in its newsletter; indeed details about participation in the study found its way into various organisational newsletters.

How representative is the sample?

The key points to emphasise are that:

1. There are no national databases for any of the samples.
2. The work of the security sector is so varied, the characteristics of workers will vary considerably. The status of security directors/managers amongst

the clients groups and the type of organisations they work for are extremely varied. Similarly, security companies undertake such a wide variety of work it in so many different contexts, what is ‘typical’ or ‘average’ is not easy to determine.

3. Unsurprisingly therefore research which has been conducted, typically on small samples, has tended to confirm the variety rather than offer guidance as to what is ‘typical’ or ‘average’.
4. Although we asked about membership of representative associations in the hope of comparing our sample with those who said they were members proved problematic. First, where the business is a member rather than the individual, such as the BSIA, it does not keep details of individuals against which to compare. Second, most individuals were not members of any one organisation (with one exception) in sufficient numbers to make a comparison possible. Third, even where there was, and it could break down its broad membership for comparison with the sample (and helpfully did so), it had limited information on members for this process.

In order to make progress we obtained details from several sources to compare those who took part in the survey with other populations.

First, a national security company supplier, in the top five, provided a breakdown of its staff and these are compared to the sample we obtained. Here we have taken those members of the sample who worked for a contract security company (so excluded in house guards). Of course there is nothing to suppose that those who work for a national company are ‘typical’ but in the absence of anything else offer at least a point of comparison. Here are the results.

Comparison of sample with national security provider

Table 40: Security guards (including supervisors)

Gender	Sample	National security company
Male	90.7%	82.7%
Female	4.7%	12.8%
Prefer not to say	4.7%	4.6%
Total	100%	100%
Age	**Sample**	**National security company**
25-34	18.2%	24.1%
35-44	27.3%	21.4%

45-54	27.3%	20.7%
55-64	18.2%	18.1%
65+	4.5%	3.8%
Prefer not to say	4.5%	11.9%
Total	100%	100%
Ethnicity	**Sample**	**National security company**
Other (please specify)	4.5%	1.7%
Asian	4.5%	4.8%
Black	6.8%	5.5%
White	81.8%	29.1%
Prefer not to say	2.3%	58.9%
Total	100%	100%

Table 41: Those involved in managing (including directors) of a company where main activity is Security Guarding

Number of staff in company you work for	Sample	National security company
Less than 249	36.9%	n/a
250-2999	25.7%	n/a
3000+	37.4%	n/a
Total	100%	n/a
Gender	**Sample**	**National security company**
Male	89.3%	78.7%
Female	10.2%	21.3%
Prefer not to say	0.5%	0%
Total	100%	100%

Age	Sample	National security company
16-24	0.8%	0%
25-34	12.2%	19.4%
35-44	31.8%	37%
45-54	37%	35.2%
55-64	15.9%	6.5%
65+	1.8%	0.9%
Prefer not to say	0.5%	0.9%
Total	100%	100%
Qualifications	**Sample**	**National security company**
GCSE	39.2%	n/a
A level	23.9%	n/a
Undergraduate	20%	n/a
Postgraduate	16.9%	n/a
Total	100%	n/a

Table 42: Officers and supervisors who work in Public space surveillance

Gender	Sample	National security company
Male	91.7%	90.4%
Female	0%	8.5%
Prefer not to say	8.3%	1%
Total	100%	100%
Age	**Sample**	**National security company**
25-34	23.1%	31.6%
35-44	15.4%	25.8%

45-54	46.2%	24.4%
55-64	7.7%	11%
65+	0%	1.5%
Prefer not to say	7.7%	5.7%
Total	100%	100%
Ethnicity	**Sample**	**National security company**
Other (please specify)	15.4%	1.8%
Asian	7.7%	2.8%
Black	7.7%	5.2%
White	69.2%	25.1%
Prefer not to say	0%	65.1%
Total	100%	100%

Table 43: Those involved in managing/directing companies where main activity is related to Security Equipment

Number of staff in your company	In Sample	National security company
Less than 249	27.8%	n/a
250-2999	21.7%	n/a
3000+	50.5%	n/a
Total	100%	n/a
Gender	**Sample**	**National security company**
Male	92.6%	81.5%
Female	7.4%	18.5%
Total	100%	100%
Age	**Sample**	**National security company**
16-24	1%	0%
25-34	16.3%	55.6%

35-44	34.5%	25.9%
45-54	36.5%	11.1%
55-64	11.3%	3.7%
65+	0.5%	3.7%
Total	100%	100%
Qualification	**Sample**	**National security company**
GCSE	38.7%	n/a
A level	25.8%	n/a
Undergraduate	18.6%	n/a
Postgraduate	17%	n/a
Total	100%	n/a
Are you a member of SyI (Security Institute)?	**Sample**	**National security company**
No	84.7%	n/a
Yes	15.3%	n/a
Total	100%	n/a

These data are presented to enable the reader to assess similarities and differences between one population and a sample, it is not sufficient to make comments about representativeness. Readers may wish to bear these points in mind when interpreting the findings.

Comparison of sample with data on ethnicity

We were provided in confidence with some details an organisation had collected about the ethnicity of those who worked in the sector. Again, we (nor the collector of the data) could vouch for its veracity, but it provided another comparison point. However, if that data were true it would suggest that our sample is under-representative of ethnic minorities.

Gender and clients

We were able to find a point of comparison for the sample of clients. The Security Institute was able to break down its membership of clients (as we defined them). As the following table shows, compared to membership of the Institute our sample over represents woman.

Gender	Our sample	Membership of security institute
Male	88.7%	93.8%
Female	11.3%	6.2%

Observations from the sector

We sent details of our sample to approximately twenty different people/groups for comment. These were for the most part unable (or sometimes unwilling) to provide figures for comparison but offered a range of comments.

One lead within a regional security company noted that his staff were drawn more from ethnic minorities a reflection of the geographical areas his company works in. One representative from a security representative group also thought the sample was under represented on minority groups, but did not feel sure. Both these respondents felt that the sample was broadly what they would have expected in other respects. Another security company representative with about 2,0000 employees believed it employed more women than in our sample. Another managing director of a top five security company stated that 'it looks fairly consistent with what I would expect'.

One security manager of a major commercial company who has reviewed guarding companies in a tender felt that the educational levels of directors/managers of security companies were above what he would expect, and would have anticipated even fewer representatives from ethnic minority groups. Again though he felt the sample was broadly representative in most other respects. Another managing director of top ten security company also thought that the sample was over qualified compared to the actual population, he would have expected about half as many to have a degree and less than a third in the actual population to have a postgraduate degree. Overall, we had a high percentage of supervisors respond compared to operatives.

The limitations of the data are self evident, and it is important to keep these in mind in interpreting the findings.

About Perpetuity

Perpetuity is a leading provider of research, consultancy and training in the areas of crime reduction, community safety and security. We provide bespoke services to international companies, central and local government, public service providers, private businesses as well as charities and voluntary organisations.

Our research interests include qualitative and qualitative approaches with a special interest in evaluation. We have conducted many crime related studies, and also worked in other areas including health, education and transport.

About the Authors

Professor Martin Gill

Martin Gill is the Director of Perpetuity Research and Consultancy International. He started the company in 2002 when it was formally launched by HRH Prince Michael of Kent. Martin is also a Professor of Criminology and for over two decades has been actively involved in a range of studies relating to different aspects of crime and its prevention.

He has a particular interest in business crime and the security sector. The types of projects he has been involved in (with Perpetuity colleagues) includes the causes of false burglar alarms, why fraudsters steal, the effectiveness of CCTV, the effectiveness of security guards, how companies protect their brand image, the generators of illicit markets and stolen goods, to name but a few. He has also launched and led the Security Research Initiative which was short listed for a Security Excellence award. The SRI engages leading associations and leading companies in the security sector and topics covered so far include the procurement of security, and the value of security. The findings have led to the establishment of a Best Value for Business Campaign aimed at highlighting how security can enhance organisational performance.

Martin has published widely (13 books and over 100 articles including 'Managing Security' and 'CCTV' published in 2003, and the 'Handbook' of Security' published in 2006) and is editor of Security Journal. In 2002 the ASIS Security Foundation made a 'citation for distinguished service' in 'recognition of his significant contribution to the security profession'. In 2010 he was recognised by the BSIA with a special award for 'outstanding service to the security sector'.

Charlotte Howell

Charlotte Howell joined Perpetuity in January 2009 and currently works as a Researcher, managing and delivering research contracts. Charlotte's knowledge and experience spans the range of our areas of expertise - including crime prevention and community safety, security research, and the social aspects of health research (such as substance misuse, obesity & weight management and smoking cessation).

Charlotte is involved in the delivery of Perpetuity's annual Security Research Initiative - a three year programme of research with a seperate study each year evaluating topics that are of importance to the security world. Charlotte also manages the running of the Secured Environments accreditation - a police accreditation run by Perpetuity on behalf of the Association of Chief Police Officers.

Charlotte has experience in a variety of research skills. Her quantitative skills include analysis of datasets such as survey responses, client data and performance data. Her qualitative research skills include undertaking literature reviews and undertaking consultation through interviews, focus groups and street surveys. Charlotte has consulted with a range of individuals, including stakeholders (such as individuals from the police, local authorities, teachers and service commissioners and staff), offenders (both in prison and in the community), and clients accessing services (including children and their families) such as weight management services, drug and alcohol treatment services, domestic abuse services and support services for sex workers.

Charlotte also acts as book review editor for the Safer Communities Journal - a quarterly publication that looks at practice, opinion, policy and research.

Prior to working for Perpetuity, Charlotte graduated from the University of the West of England with a first class LLB (Hons) in Law in 2003. Following this she received an MSc in Criminology from the University of Leicester in 2004. After graduating, Charlotte worked for the Leicester Criminal Justice Drugs Team, analysing and reporting on Class A drug misuse and treatment information, to maintain and improve performance.

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