

Public trust and confidence in the Private Security Industry and the Security Industry Authority – Wave 2 On behalf on the SIA September 2023



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Glossary

SIA (Security Industry Authority)	 The SIA is a statutory organisation, established to regulate certain activities within the private security industry across the UK. The purpose of the SIA is to protect the public, which it does by: Regulating individuals in the private security industry, including licensing certain jobs; and Working with partners to raise standards across the sector.
ACS (Approved Contractor Scheme)	A voluntary quality assurance scheme for security companies. To be eligible for the ACS, a company needs to pass the SIA application checks and meet the highest industry standards for various criteria, including service delivery and strategy. Companies are renewed on the ACS every three years. To be renewed, they must continue to meet eligibility criteria (including guidance changes) and undergo annual assessments.





BAGE success decoded

SECURITY

Background, Methodology & Executive Summary



Background and research objectives

The SIA's role as security industry regulator is to work closely with the industry to ensure that security companies are accountable, well-run, and meet their legal obligations. These activities should contribute significantly to ensuring trust and confidence in both the private security industry as a whole and the SIA as a regulator.

Last year (2022), the SIA identified a need to increase understanding of public trust and confidence in the private security industry and commissioned BMG to conduct an initial wave of research.

The *baseline wave* fed into the development of the SIA's corporate strategic planning and stakeholder engagement activity informed the SIA's strategy, activities, and tactics in supporting improved trust in the industry.

This wave of research continues to track metrics from the *baseline* wave and provide analysis on some topical areas of interest, again using qualitative techniques where appropriate. This will allow the SIA to measure and monitor whether the activities and initiatives the SIA carry out have an impact on public trust and confidence in security.

To ensure the report follows a logical structure that is easy to navigate, we have broken down the core research requirement into four more specific key research questions, each with sub-questions underneath – *see the breakdown on page 6*. This framework also forms the report's structure, with a section for each of the four strands.

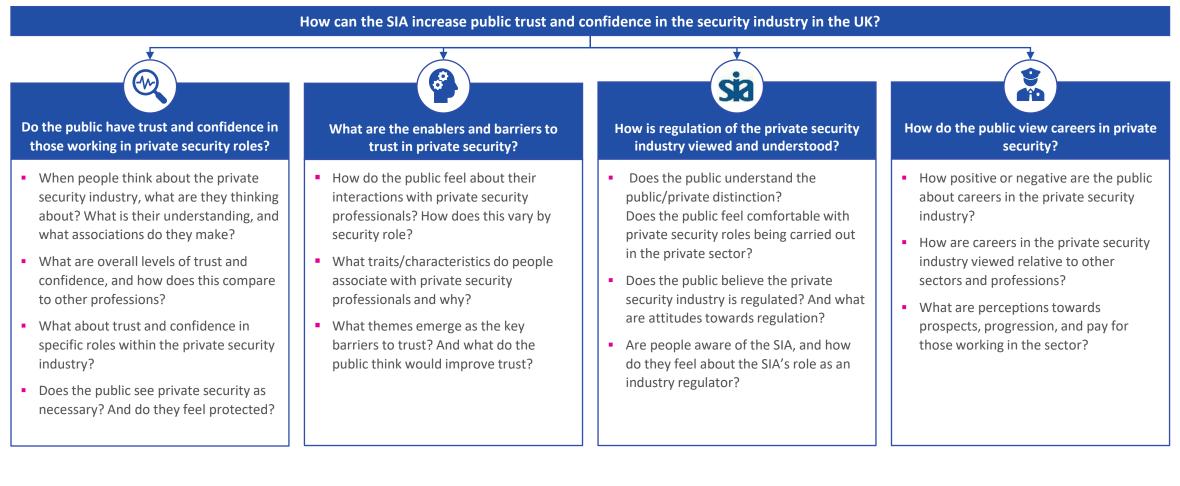
As a final note, the results cover public and stakeholder perceptions of the security industry and should not be used as harder metrics that may be used to evaluate SIA initiatives.





This report is structured around four overarching research questions

This report is structured around four overarching research questions. Each key research question is answered by addressing a series of sub-questions covered within each section.

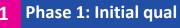






Methodology (1 of 2)

The programme comprised 3 research phases. While the baseline wave used the initial qualitative phase to explore topics to include as part of the quantitative research, the qualitative phases of this wave covered different subjects to ensure a greater range of in-depth insights. The quantitative findings were also used to inform some topics to discuss in the follow-up qualitative research.





Methodology: 3 online focus groups with the public



Fieldwork: 24th July – 2nd August 2023



<u>@</u>

Number of participants:

23 participants across the 3 focus groups. Findings may not be fully representative of the wider public.

Sample design:

Groups sampled by age (18 –29; 30 – 49; 50+). A balance between male and female participants. At least 3 participants from an ethnic minority background in each group.



Purpose: To explore current knowledge and perceptions of the security industry, what drives trust in the industry, and attitudes towards careers in the industry



Phase 2: Quantitative survey



adults across the UK, aged 16+.

Fieldwork: 18th – 28th July 2023

Sample design:

Number of interviews:



Q



ethnicity, education, Index of Multiple Deprivation (IMD), and urban-rural. **Purpose:** To understand attitudes and

Representative quotas set on age by gender

and region, with additional weights applied on

Nationally representative sample of 2,621

perceptions from a representative sample of the public, with questions covering all core objectives.

Phase 3: Follow-up qual 3



5 online focus groups; 3 with the public and 2 with stakeholder participants



Fieldwork: 5th – 13th September 2023

Number of participants:



A total of 22 participants took part in the public groups and 7 in the stakeholder groups. Findings may not be fully representative of the wider public or of the wider security industry.

Sample design:

The public follow-up groups were sampled in

the same way as Phase 1.

Stakeholder participants were security professionals vetted by the SIA.



Purpose: To further explore perceptions of the security industry, including differences between public and stakeholder perceptions of security professionals' behaviour, careers in the industry, and the impact of regulation.





Methodology (2 of 2)

The boxes below detail the reporting conventions used throughout this report.

Quantitative and Qualitative symbols

As detailed in the previous slide, this programme used both qualitative and quantitative approaches. To aid both navigation of the report and interpretation of the findings, the insights from each approach are signified with the following symbols:



Quantitative:

Analysis based on the quantitative survey (phase 2) will be accompanied by this symbol throughout the report.

Qualitative:



Analysis based on the qualitative components (phases 1 and 3) will be accompanied by this symbol throughout. Note that findings from the qualitative components are there to offer richer insight but may not be fully representative of the public/stakeholders.

2 Significance testing

Throughout the quantitative elements of this report, results are discussed in terms of differences between sub-groups and the result for the total (average for all respondents), or marking significant changes between waves. Differences are considered to be significant at the 95% confidence level, meaning that there is only a 5% possibility that the difference occurred by chance rather than by being a real difference. This is a commonly accepted level of confidence.

Please be aware that the size of the sample affects the percentage difference required for significant changes. The bigger the sample size, the smaller the difference required to be statistically different. Significant differences between a sub-group and the total are shown with the use of the below arrows. Up means that the sub-group is significantly higher than the total, and down means it is significantly lower.

- ▲ Significantly higher at 95% level of confidence
- **V** Significantly lower at 95% level of confidence

3 Rounding of percentages

The data used in this report are rounded up or down to the nearest whole percentage. For this reason, tables or charts may occasionally add up to 99% or 101%. The sum of these rounded figures should not be greater than 2 percentage points above or below 100%.

A note on wording

The security sector is broad and varied with a number of roles including cash and valuables in transit, door supervision, security guarding, key holding, and public space surveillance.

For overall metrics such as trust and competence, the survey asked respondents to consider 'security officers/guards (e.g., door supervisors, and retail guards)'. This was for simplicity and to ensure a relatively focused task for respondents. However, other parts of the survey provided respondents with opportunities to give feedback on more specific roles.







Executive Summary



Executive Summary - findings

- A STABLE PICTURE: Results across 2022 and 2023 are very stable, with very few statistically significant changes across the survey. High levels of consistency indicate that results from last do not simply reflect a snapshot in time or a 'one-off' but rather show a relatively slow-moving picture when it comes to public perceptions of the security sector.
- MOST PEOPLE TRUST SECURITY OFFICERS: Over half of the survey respondents trust security officers (59%), are confident that they do the right thing (58%) and are confident they carry out their duties competently (64%) all in line with results from 2022. Trust remains higher for other professions, such as police officers (63%) and police community support officers (63%). Although most survey respondents trust all security professionals, door supervisors are the least likely to be trusted, typically due to perceived aggression.
- SECURITY OFFICERS SHOULD BE MORE HELPFUL, PROFESSIONAL, AND RELIABLE: Fewer people thought that security officers were actually helpful, professional, or reliable than they thought they should be. Negative traits that the public saw but wanted less of were: being abrupt, heavy-handed, and rude. Focus group insights reflected the survey findings. That said, there were some positive traits where what the public wanted from security officers and what they felt they received matched more closely; these were assertiveness and being determined. More generally, focus group findings suggested this was because the role of the police is to protect *the public*, while private security protects an *organisation's* interests or to protect property.
- PUBLIC AND PRIVATE SECURITY ARE AND SHOULD BE DISTINCT: Most still feel private security and public security (e.g. the police) are distinct and fulfil different roles. While the most common view is that the balance between private and public security is about right (42%), a third (32%) believe more security work should be done by the public sector. This is an increase from 28% since 2022.
- THE PUBLIC ARE BECOMING MORE AWARE OF THE SIA: Awareness of the SIA has increased from 28% to 33% since 2022. This is mainly driven by increased awareness among 35-54 year olds, ethnic minorities, and those with disabilities.
- LICENSING SIGNALS COMPETENCE, BUT ONLY IF PEOPLE FEEL CONFIDENT IN THE LICENSING PROCESS: For focus group participants, trust and integrity were associated with competence, authority, and training. Licensing was seen as a way to signal competence, but first, the public wanted clarity on what being licensed entailed; what background checks were done; what expectations they should have of security officers; and how they are expected to interact with the public. Both the public and stakeholders reserved some scepticism about whether the current licensing system was robust enough to improve standards across the industry.
- PRIVATE SECURITY IS SEEN AS A 'SECONDARY' JOB, BUT ONE TO BE PROUD OF: Private security is more likely to be viewed as a good secondary job than a first-choice career (59% c.f. 40%). A majority also agree that security careers are high-risk (61%). The focus group findings supported this. Nevertheless, a greater proportion feel that private security is a career to be proud of (68%) compared with professions in sectors such as retail/groceries (63%), catering (60%), and warehouse/logistics (60%).



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BMG success decoded

Section 1: Do the public have trust and confidence in those working in private security roles?

RITY



Section summary – Trust and Confidence

- Door supervisors and security guards are still the roles the public most closely associate with private security: The public tends to think about two roles when it comes to security security guarding (59%) and door supervision (53%). Around a quarter think of event stewarding (24%) and sporting event stewarding (27%) roles unregulated but generally not perceived as distinct from other regulated roles.
- Most people trust security officers/guards: Levels of trust in security officers/guards are consistent with 2022. 6 in 10 UK adults (59%) say they trust security officers/guards, and 12% say they distrust people working in these roles. However, trust still appears lower when you compare security officers/guards to other professions, for example, the police (63%) and community support officers (63%). Some focus group participants mentioned that they had more trust for professionals they had more interactions with and where they understood the training process for these roles better. They also said they trust roles that are 'there to help people', which reflects the findings on page 19.
- Most also believe security officers/guards are competent and act with integrity: 64% are confident that security officers/guards carry out their duties competently and effectively, and 58% that they act with integrity and do the right thing; proportions similar to 2022. Yet security officers/guards are again relatively low-ranking in confidence compared to other professions.
- There is more recognition of value when the absence of private security is considered: In line with 2022, a majority of the public say those working in public-facing security roles make people feel safe and are felt necessary in various settings. For settings that were asked about for the first time this year, around 6 in 10 felt safer due to private security presence (61% at national celebrations and 59% at international sporting events). Three quarters (76% & 77%) also felt that private security was important in these locations.
- Public only notices the value of private security when something goes wrong: Some stakeholders think that much of their good work is not seen, and therefore can't be appropriately valued, by the public.
- Public associate private security with protecting property, rather than protecting people (unless they are high-profile individuals): Public participants primarily described the purpose of private security as deterring criminal activity and protecting profits, rather than as someone there to help, protect, or serve the public.



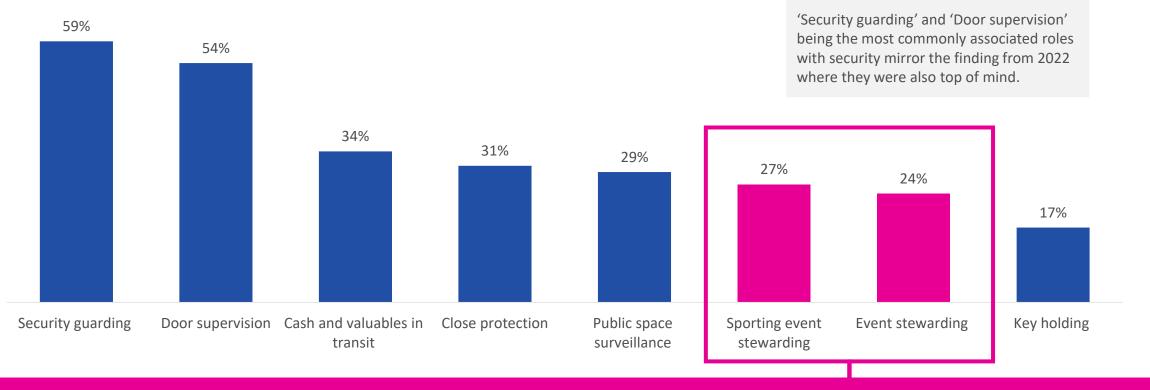


RITY

The public still tends to think about two roles when it comes to private security – security guarding and door supervision



% of respondents associated each role with the security sector



Relatively high numbers think about stewarding roles despite these positions being unlicensed, but they are not necessarily 'top-of-mind'.





The strongest top-of-mind association with security officers/guards remains protection / safety / security, similar to 2022

Traits / Characteristics Roles / Locations Other Bouncers/Door Men/ Protection/Safety/Security/Safe 49% 5% Uniform 10% Guard Big/Strong/Beefy/Burly 7% 2% Men Helpful/Good Shops 3% 3% Violence/Trouble/Danger 2% Trust/Trustworthy 3% Stopping Boring/ Boredom 1% Shoplifters/Shoplifting/ 3% Bullies/Thugs 2% Theft/Criminal Low Pay/Underpaid 1% Aggressive/Scary/Intimidating 2% **Supermarkets** 2% *% Work Tough/Brave 2% *% Long hours Arrogant 1% 2% Prison NightWork *% Lazv 1% Power Trip/Power 1% *% Others Nightclubs/Pubs/Clubs 1% Not trustworthy/ Distrust *% No/None/Nothing *% 1% Banks *% Don't Know/Unsure/Not Integrity 1% Sure

Top-of-mind associations with security officers/guards – Grouped by theme

No-one in the public focus groups in 2023 spontaneously shared a positive experience of an interaction with a private security officer, and most that came first to mind were of interactions with door security at a bar or club. However, some participants did describe feeling generally 'comforted' by their presence in large group settings (such as festivals and nightclubs).

Participants tended to think of private security roles as 'bouncers', supermarket security officers, airport security staff, and stewards at large events.

However, cyber security and protecting companies from digital crime were also mentioned.

"I think more of cyber security nowadays, but I couldn't name any companies." (Female, 30-49)

Participants also highlighted the role of personal technology in making private security more normalised and accessible for the individual. Ring (the video doorbell) and Swann came to mind for some.





Those working in private security are aware of the largely negative stereotypes the public have of security officers...

- Stakeholders in line with general public survey findings (page 13) know that members of the public are likely to think first of public-facing roles such as nightclub door supervisors or security officers in supermarkets.
- They are also aware of the largely negative stereotypes the public has of security officers (page 43), which they feel can be driven by negative media coverage.
- They thought that for the public to view the industry as professionals, they would need to observe higher standards in their day-to-day interactions with private security.

"Broadly there are two stereotypes for security: there is the older male sat in a gatehouse smoking a cigarette; and there is the big burly male in a leather jacket stood outside a nightclub or pub. That is what I think the public think of private security." (Stakeholder)

"This tends to be a reactive role, and a bad news situation, and perceptions are built on experience " (Stakeholder)







...but they also think that the public should be made more aware that security officers are primarily there to help

- Stakeholders thought the public felt safer and reassured in the presence of security officers, especially at crowded organised events. This view is reflected public survey results (page 28).
- Some stakeholders said they felt the industry was moving in the right direction and that perceptions among younger people especially were shifting. Again, this is supported by the public survey where trust among 16-34 year old participants has increased (page 23).
- They thought, however, that much of their work from the positive impact it makes, to the diversity of roles available is not seen by the public.
- If they wanted the public to know one thing about the industry, it was that security officers are primarily there to help people. This contrasted with the much of public focus group's perceptions that private security officers functioned primarily as a deterrent to those who would commit a crime, rather than to protect those who might be victims (page 29).

"Sometimes we are the fifth emergency service. A parade of high-viz jackets allow people to think there is more presence of security: someone looking out, competent, focused, and vetted." (Stakeholder)

"We only become an asset when there's an issue." (Stakeholder)

"The visibility of our sector, and our responsibilities, are understated massively" (Stakeholder)



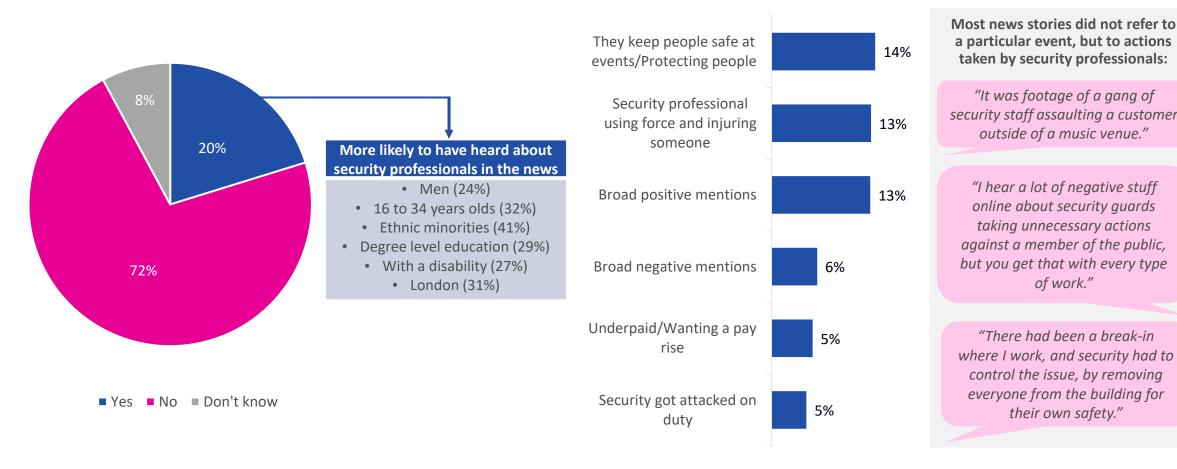


A fifth have heard about security professionals in local or national news, but most could only recall broad coverage with few details



Heard about security professionals in the news in the last 12 months

What they heard about security professionals in the news





D07. Have you seen or heard anything about security professionals in the local or national news in the last 12 months? Base: Subsample of all respondents (845) D08. You mentioned that you have saw or heard something about security professionals in the news in the last 12 months. Could you tell us a little bit more about what you heard. Results 5% and above shown. Base: All who have heard about security professionals in the news (169)

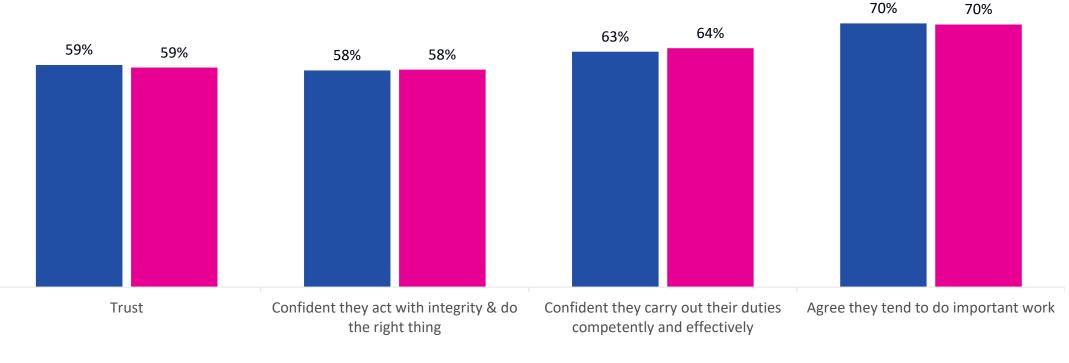


A stable picture: the trust, confidence and importance metrics for security officers/ guards have all remained in line with 2022



*These are NET figures for scale responses to key metrics (e.g. 'Trust a lot' and 'Trust a little' combined).

Full scores for each presented in following pages.



2022

Trust', 'Confidence' & 'Agree with importance of work' of Security Professionals*





A01. Generally speaking, how much would you say you tend to trust or distrust those working in the following professions/roles? A02. And how confident, if at all, are you that people in following professions tend to act with integrity and do the right thing? A03. And how confident, if at all, are you that people in the following professions tend to carry out their duties competently and effectively? A04. And to what extent would you say the people in the following professions tend to do important work? Base: All respondents, 2022 (2,597); 2023 (2,621)





Levels of trust in professions

							TTUSL	Distrust
		69%			22% 6%	91%	2%	
		67%		2	6%	90%	3%	
		55%		30%	10% 4%	85%	5%	
Coastguards			60%		24%	12%	84%	3%
	Military personnel	L	15%	32%	/ 0	<u>16%</u> 5%	77%	7%
	Teachers / teaching assistants	39%	6	36%		17% 5%	75%	8%
Pos	stal workers / postmen and women	31%		44%		19% 5%	75%	6%
	Carers / careworkers	32%		39%		18% 7% 3%	71%	10%
	Bus and train drivers	27%		40%		24% 5%	68%	7%
	Shop / retailworkers	20%		47%		27% 3%	67%	5%
	Police community support officers	27%		37%	19%	11% 7%	63%	17%
	Police officers	28%		35%	15%	13% 9%	63%	21%
	Cleaners	24%		38%	289	% 7%	62%	8%
Ranks 14th of 20 in the	Security Officers / Guards	19%	40%	6	28%	9% <mark>3%</mark>	59%	12%
list of professions put to respondents.	Socialworkers	18%	37%		25%	11% 9%	54%	20%
respondents.	Warehouse / logistics staff	15%	36%		40%	5%	51%	7%
	Taxi drivers	12%	33%	34	%	16% <mark>4%</mark>	45%	20%
	Civil servants	13%	31%	32%)	12% 9%	44%	21%
	Journalists / Media professionals	6% 18%	20%	29%		25%	24%	53%
	Politicians	4% 12%	16%	19%	46%		17%	65%
Trust a lo	t Trust a little Neither trus	t nor distrust	Distrust a little	Distrust a lot	■ Don't	know		



A01. Generally speaking, how much would you say you tend to trust or distrust those working in the following professions/roles? Base: All answering (2,621 for 'Security Officers / Guards'; around 50% sample asked for each other profession). All respondents were shown security officers/guards alongside another 9 professions at random.



Distrust

Trust

We see similar results when looking at metrics for 'act with integrity and do the right thing', also in line with 2022



Confident Not confident

Confidence that those in professions act with integrity and do the right thing

Paramedics / Ambulance workers 61% 27% 8% 2% Firefighters 60% 27% 8% 2% Coastguards 51% 30% 13% 3% Nurses / Doctors / GPs 47% 34% 12% 5% Military personnel 39% 37% 16% 5% 7% Teachers / teaching assistants 34% 41% 17% 5% 7% Postal workers / postmen and women 27% 47% 20% 5% 7% Bus and train drivers 23% 45% 23% 6% 68% 10% Shop / retail workers 26% 42% 21% 7% 3% 6% 63% 7% Police community support officers 23% 37% 18% 12% 6% 63% 7% Cleaners 17% 45% 28% 6% 63% 7% Cleaners 17% 45% 27% 7% 62% 9% Cleaners 17% 45% 27% 7% 62% 9% <td< th=""><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th>connuent</th><th></th></td<>								connuent	
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Cleaners 17% 45% 27% 7% 62% 9% Police officers 23% 37% 17% 14% 8% 60% 22% Ranks 14 th of 20 in the t of professions put to respondents. Security Officers / Guards 18% 40% 28% 10% 58% 12% Social workers 16% 40% 24% 12% 7% 56% 19% Warehouse / logistics staff 12% 40% 37% 8% 52% 10% Civil servants 15% 32% 29% 13% 8% 47% 22% Journalists / Media professionals 8% 19% 25% 25% 22% 26% 47% Politicians 4% 13% 18% 23% 40% 18% 63%		Shop / retail workers	16%	47	%	289	6%	63%	7%
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Security Officers / Guards18%40%28%10%58%12%Social workers respondents.Social workers Warehouse / logistics staff16%40%24%12%7%56%19%Warehouse / logistics staff12%40%37%8%52%10%Civil servants Taxi drivers Journalists / Media professionals Politicians15%32%29%13%8%47%22%Politicians4%13%18%23%40%18%63%		Cleaners	17%	45	5%	27%	7%	62%	9%
t of professions put to respondents. Warehouse / logistics staff L2% Warehouse / logistics staff Civil servants Taxi drivers Journalists / Media professionals Politicians		Police officers	23%		37%	17%	14% 8%	60%	22%
respondents. Social Workers 16% 40% 24% 12% 7% 56% 19% Warehouse / logistics staff 12% 40% 37% 8% 52% 10% Civil servants 15% 32% 29% 13% 8% 47% 22% Taxi drivers 11% 35% 34% 15% 4% 19% Journalists / Media professionals 8% 19% 25% 25% 22% 26% 47% Politicians 4% 18% 23% 40% 18% 63%		Security Officers / Guards	18%	40%	0	28%	10%	58%	12%
Warehouse / logistics staff 12% 40% 37% 8% 52% 10% Civil servants 15% 32% 29% 13% 8% 47% 22% Taxi drivers 11% 35% 34% 15% 46% 19% Journalists / Media professionals 8% 19% 25% 25% 22% 26% 47% Politicians 4% 18% 23% 40% 18% 63%		Social workers	16%	40%		24%	12% 7%	56%	19%
Taxi drivers 11% 35% 34% 15% 4% 46% 19% Journalists / Media professionals 8% 19% 25% 25% 22% 26% 47% Politicians 4% 13% 18% 23% 40% 18% 63%	respondents	Warehouse / logistics staff	12%	40%		37%	8%	52%	10%
Journalists / Media professionals 8% 19% 25% 25% 22% 26% 47% Politicians 4% 18% 23% 40% 18% 63%		Civil servants	15%	32%		29%	13% 8%	47%	22%
Politicians 4% 13% 18% 23% 40% 18% 63%		Taxi drivers	11%	35%		34%	15% <mark>4%</mark>	46%	19%
		Journalists / Media professionals	8% 19%	259	%	25%	22%	26%	47%
🗖 Very confident 🔎 Fairly confident 🔎 Neither confident nor unconfident 🔎 Not very confident 🔎 Not confident at all 🔎 Don't know		Politicians	4% 13%	18%	23%	40	%	18%	63%
	Very confid	lent 🔲 Fairly confident 📕 Neithe	r confident nor ur	iconfident 🛛 🗖 No	ot very confiden	t 📃 Not confide	ent at all 🛛 🗖 Don't knov	N	



A02. And how confident, if at all, are you that people in following professions tend to act with integrity and do the right thing? Base: All answering (2,621 for 'Security Officers / Guards'; around 50% sample asked for each other profession). All respondents were shown security officers/guards alongside another 9 professions at random.



20



Confident Not confident

The same pattern is observed with the metric 'carry out their duties competently and effectively', again in line with 2022

Confidence that those in professions carry out their duties competently and effectively

								Confident	Not confident
P		60%			28%	9% 2%	88%	2%	
	Firefighters		62%			25%	<mark>9% 1%</mark>	87%	2%
	Nurses / Doctors / GPs				33%		<mark>12%</mark> 4%	82%	6%
	Coastguards		52%		29%		1 <mark>2% 3%</mark>	81%	4%
	Military personnel		43%	35%		15	<mark>3% 4%</mark>	78%	6%
	Teachers / teaching assistants	34	4%		43%	14	<mark>% 5%</mark>	78%	7%
Postal	workers / postmen and women	30%	0	459	%	199	<mark>% 3%</mark>	75%	5%
	Bus and train drivers	28%		44%		18%	6%	73%	7%
	Carers / care workers	27%		42%		21%	6% <mark>3%</mark>	69%	9%
	Shop / retail workers	21%		48%		23%	5%	68%	7%
Cleaners		22%		47%		23%	6%	68%	7%
Pc	plice community support officers	27%		38%	1	.7%	10% 6%	65%	16%
Ranks 13th of 20 in the	Security Officers / Guards	20%		44%		24%	9%	64%	11%
list of professions put to	Police officers	25%		37%	18	% 1	1% 7%	63%	18%
respondents.	Warehouse / logistics staff	16%		46%		30%	5%	62%	7%
	Taxi drivers	15%		43%	27	%	11% <mark>3%</mark>	58%	14%
	Social workers	16%		41%	21%	12	% 8%	58%	20%
	Civil servants	17%	34	.%	26%	12%	9%	51%	21%
J	ournalists / Media professionals	11%	23%	26%	22%	0	17%	34%	38%
	Politicians	8% 15%	/ 189	23%	%	35%		23%	58%
Very confident	🗖 Very confident 🔲 Fairly confident 🔎 Neither confident nor unconfident 🔎 Not very confident 🛸 Not confident at all 🔎 Don't know								



A03. And how confident, if at all, are you that people in the following professions tend to carry out their duties competently and effectively? Base: All answering (2,621 for 'Security Officers / Guards'; around 50% sample asked for each other profession). All respondents were shown security officers/guards alongside another 9 professions at random.



Trustworthiness and integrity were closely associated with perceived training and background vetting



- We know from the quantitative survey that around six in ten trust security guards or are confident that they act with integrity and do the right thing. To explore this further we asked our focus groups about these subjects.
- The public felt there was too much inconsistency between roles and expectations across the variety of private security roles to say they 'trust' security officers as a rule.
- Some said that trustworthiness and integrity are qualities that come with (perceived) experience, training, and confidence.
- The roles that public participants tended to trust were those where people were committed to putting people's welfare and safety first (with the implication, by comparison, that private security did not). These highly-trusted roles included paramedics, doctors, and teachers in line with the quant findings on slide 20.
- Stakeholders say that trustworthiness can be driven by strict licensing, which will show the public there are high standards of training and vetting. Some worry that, currently, both licensing and professional standards are lacking robustness, which risks reputational damage.

"There's more trust for security officers who seem to be more highly trained, or with more authority." (Male, 30-49) "I would trust a paramedic more – they don't just 'follow rules', they are there to save my life first and foremost."(Male, 30-49)

"I have concerns about perceptions. As a member of the public, I would want to see how security personnel are actually able to help me." (Stakeholder)



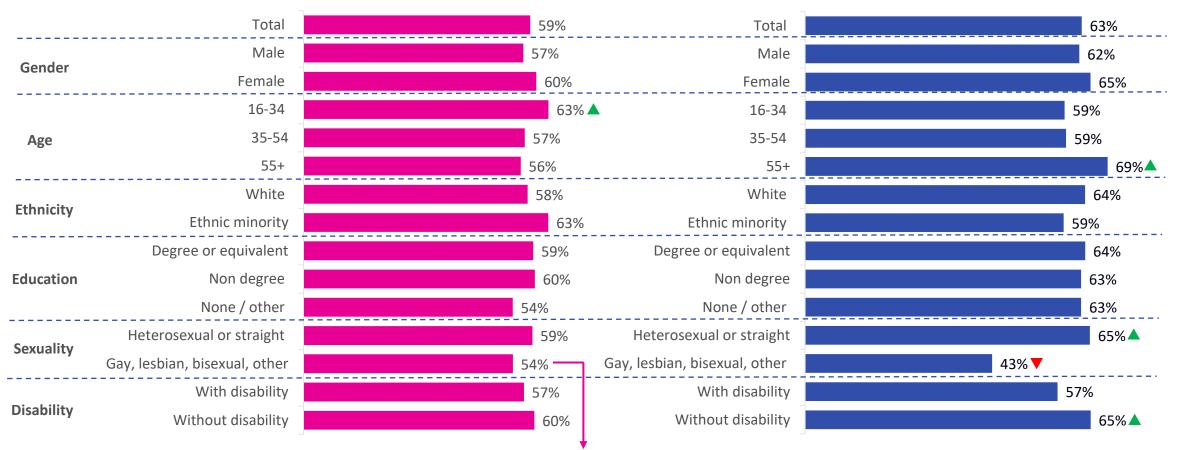


Young people are more likely to trust private security than older; while the reverse is true for the police



Trust in security officers/guards across demographic groups

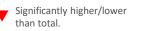
Trust in police officers across demographic groups



Gay, lesbian, bisexual, other respondents are more likely to say they distrust security officers than Heterosexual / Straight respondents (19% c.f. 12%)



A01. Generally speaking, how much would you say you tend to trust or distrust those working in the following professions/roles? Base: All answering - base sizes vary by subgroup.



23



Important Not important

In line with 2022, around 7 in 10 describe the work of security officers/guards as important – similar to cleaners and warehouse/logistics staff

Importance of work done by each profession

							important	Not important
	Paramedics / Ambulance workers	77% 13% <mark>6% 2%</mark>			3% <mark>6% 2%</mark>	90%	2%	
	Firefighters	75% 14% 7%			% <mark>7% 2%</mark>	89%	3%	
	Nurses / Doctors / GPs	74% 15%			% 8% 2 <mark>%</mark>	89%	3%	
	Coastguards		64%		22%	<mark>8% 3%</mark>	87%	4%
	Teachers / teaching assistants		57%		28%	11% 2%	85%	3%
	Police officers		59%		26%	10% 3%	85%	4%
	Military personnel		60%		25%	10% 2%	85%	4%
	Carers / care workers		56%		29%	11% 3%	85%	4%
Post	al workers / postmen and women	39%		43%		13% 3%	82%	4%
	Bus and train drivers	39%		42%		13% 4%	81%	5%
F	Police community support officers	449	%	34%	1	. <mark>2%</mark> 6% <mark>3%</mark>	78%	9%
	Social workers	43%	%	32%	1	<mark>7% 5% 3%</mark>	75%	8%
	Cleaners	27%		44%	19%	6%	71%	8%
Ranks 14th of 20 in	Security Officers / Guards	26%		44%	21%	6%	70%	8%
the list of professions put to respondents.	Shop / retail workers	24%	4	13%	24%	7%	67%	8%
put to respondents.	Warehouse / logistics staff	20%	44%	/ 0	27%	6%	64%	8%
	Civil servants	24%	36%	6	25%	9% <mark>4%</mark>	60%	13%
	Taxi drivers	17%	39%		30%	10% <mark>3%</mark>	56%	13%
	Politicians	27%	26%	219	<mark>% 1</mark> 1%	13%	54%	24%
	Journalists / Media professionals	15%	28%	27%	16%	11%	44%	27%
Very import	ant 📕 Fairly important 📕 Neither	important nor unim	nportant 🗖 Fairl	y unimportant	Very unimpor	tant 🗖 Don't know	/	

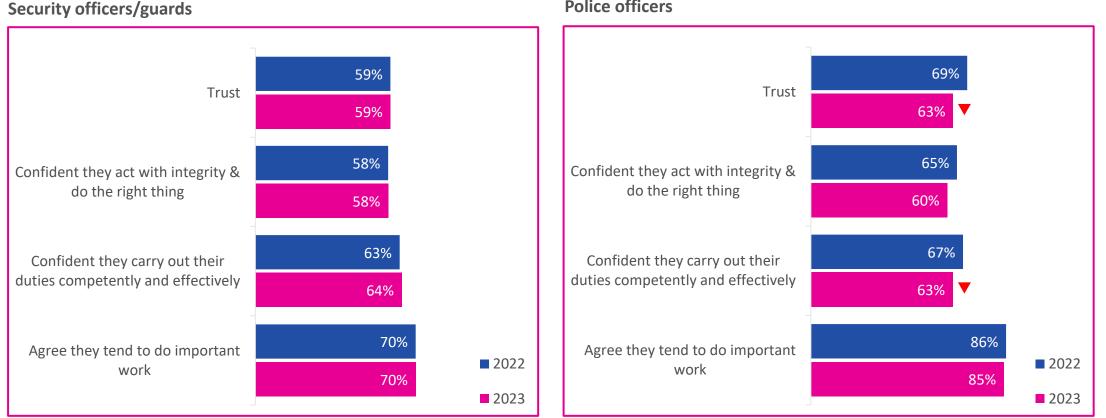


A04. And to what extent would you say the people in the following professions tend to do important work? Base: All answering (2,621 for 'Security Officers / Guards'; around 50% sample asked for each other profession). All respondents were shown security officers/guards alongside another 9 professions at random.



24

While metrics for security officers have remained similar, trust in police officers and confidence that they carry out their duties effectively has declined since 2022



Police officers



A01. Generally speaking, how much would you say you tend to trust or distrust those working in the following professions/roles? A02. And how confident, if at all, are you that people in following professions tend to act with integrity and do the right thing? A03. And how confident, if at all, are you that people in the following professions tend to carry out their duties competently and effectively? A04. And to what extent would you say the people in the following professions tend to do important work? Base: All respondents, 2022 (2,597); 2023 (2,621)

Significantly higher/lower than previous wave



Focus groups generally said they trust the police a little more than private security, although less so than they used to



- Focus groups broadly agreed with the findings on page 25. One group said their police officers were more familiar and recognisable, and that they felt more part of the local area. They said this created a sense of increased responsibility and accountability, compared to security officers.
- They suggested that increased trust in private security can be fostered through repeated positive associations.
- People felt that they used to trust the police more than private security, but that was shifting. The association with the police was not wholly positive, with many members of the public having poor perceptions of the police, especially around their interactions with minorities, and sometimes compounded by both national and international media representation.

"We know more about the police: there is the uniform, and they have a recognisable face in the community. They have a station, and each one belongs to a particular station." (Male, 18-29)

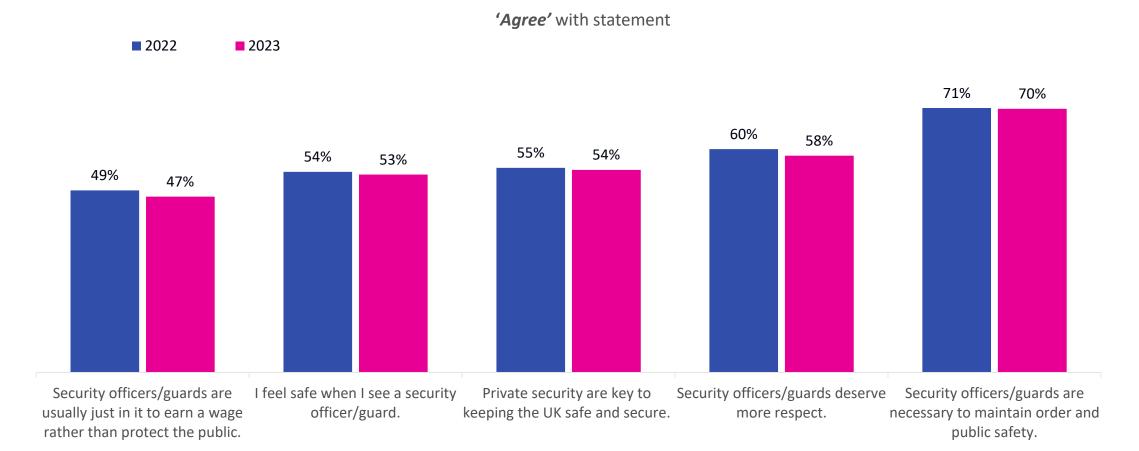
"Police would be expected to help people out, like helping old ladies across the road. Security guards, you wouldn't really expect them to help." (Female, 18-29)

"Perceptions are based on experience. We don't celebrate the good and the media exacerbate the bad." (Stakeholder)





The public continues to be positive about the impact of security officers on public safety, including 7 out of 10 who see them as necessary to maintain order and public safety



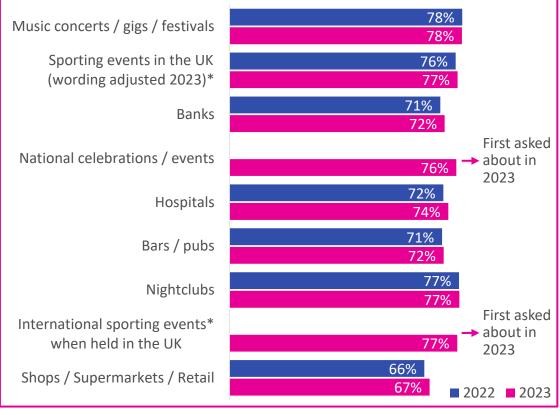




People working in security roles continue to be viewed as important and make people feel safe across a range of settings - all metrics remain in line with 2022



Important that private security is present in the following location



*High numbers saying that it is important private security is present at sporting events despite these positions being unlicensed.



D05. Does a private security presence in the following environments make you feel more or less safe? D06. And how important, if at all, do you think it is to have a private security presence in the following locations? Base: All respondents, 2022 (2,597); 2023 (2,621)

28

Public participants primarily described the purpose of private security as deterring criminal activity – but more for protecting the client organisation and its assets, rather than the public

- Despite the survey results showing that many felt safer due to their presence, many saw private security as something private organisations paid for to protect their assets.
- The public saw the role of private security officers primarily as a deterrent to those who would commit a crime, rather than to protect those who might be victims.
- People were divided on whether security guards were effective at 'deterring' crime, as they were unsure on the types of measures private security officers were permitted to take to handle challenging situations.
- Some public participants also associated private security with wealthier or "VIP" individuals and protecting themselves or their property as the priority.

"Public security, like police, will not protect your assets - nothing they can do before or during a crime. With private property, you need to make sure you're looking after it [...] The police don't treat burglary as a priority anymore." (Male, 18-29)

"You see them in rich neighbourhoods: private patrols; [...], protecting people's assets; keeping the poor people out." (Female, 30-49)









Section 2: What are the enablers and barriers to trust in private security?



Section summary – Barriers to Trust

- Personal experience remains a key driver of trust: In line with 2022, a key factor driving overall trust and confidence in private security professionals is personal experience or interactions with those working in the sector. Unsurprisingly, individuals who have had positive experiences with those in security roles are much more likely to have greater levels of trust.
- Door supervision is still the least trusted role: Most say they trust those working in door supervision roles (63%), but distrust at 13% is higher than any other role in security (as was the case in 2022). Lower trust in door supervisors is typically driven by personal experience, with most of those with negative experiences describing instances where door supervisors displayed bullying, rude, or aggressive behaviour.
- Most are confident that security professionals act with integrity and carry out duties competently: Most participants feel that various security professionals act with integrity and carry out their duties competently, with the only change from 2022 a slightly lower proportion feeling this is the case for door supervisors. However, more agree than disagree that some security officers can be susceptible to corruption (49% c.f. 10%).
- There is a desire for more helpful, professional and reliable security personnel: Determination and assertiveness are traits currently associated with security officers/guards that match closely with public desires. Traits where the current association is lower than the desired association, such as being professional, helpful or reliable, should be promoted to improve perceptions of security officers/guards. A third group of traits where the current association was higher than the desired association included being rough and abrupt. These are traits that security officers/guards should distance themselves from to improve industry perception.
- Focus group participants identified personality traits and "softer skills" that they wanted to see which would increase trust in private security officers: these include courtesy, empathy and compassion; approachability and trustworthiness; diplomacy and staying calm under pressure; an ability to diffuse a situation; have charisma and presence. This reflects quant findings on page 39.



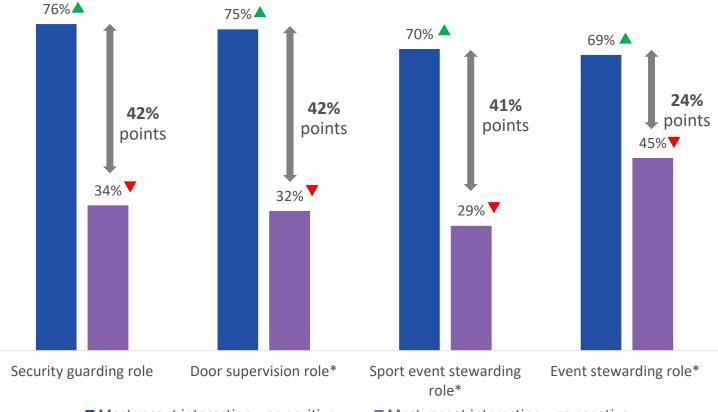


Personal experience continues to be a key driver of overall trust – those with negative experiences are considerably less likely to trust those in security roles

As we say in 2022, a key factor that drives overall trust and confidence in private security professionals is whether recent personal interactions with those working in the sector were positive or negative.

Those who have had positive experiences with those in private security roles are much more likely to have greater levels of trust.

The gap in trust between those whose most recent experience was positive and those whose most recent experience was negative is highest for security guarding (42%), door supervising (42%), and sports event stewarding roles (41%). Very similar gaps for each role were also seen in 2022.



% who trust security officers/guards by whether most recent experience was positive/negative

Most recent interaction was positive

Most recent interaction was negative



A01. Generally speaking, how much would you say you tend to trust or distrust those working in the following professions/roles? Base: Door Supervision positive (491); Door Supervision negative (98); Security Guarding positive (460); Security Guarding negative (47); Sport Event Stewarding positive (384); Sport Event Stewarding negative (34); Event Stewarding positive (479); Event Stewarding negative (43). *Base size below 50 for negative interaction.



Key Driver Analysis: an overview and our approach

Key Driver Analysis is an in-depth way of evaluating which factors (or "drivers") are important in explaining how people respond to a key survey question of interest.

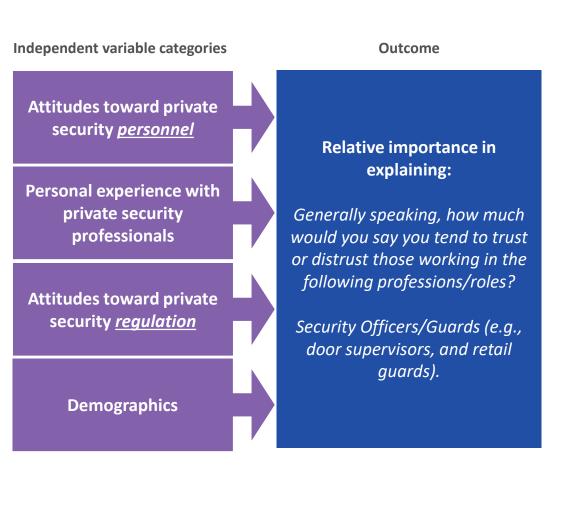
For this study, we are interested in understanding what factors are important in driving trust in private security officers/guards.

In other words, we are interested in understanding what survey variables make someone more likely to trust or distrust private security officers/guards.

We selected a number of factors we wanted to test and have grouped these into four broader categories:

- 1. Attitudes toward private security personnel,
- 2. Personal experience with various private security professionals,
- 3. Attitudes toward private security regulation, and
- 4. Demographics

This is a repeat of an analysis we ran in 2022, but we newly added attitudes toward private security personnel to the model. Though this means the model looks slightly different, for the variables included in both 2022 and 2023, the results tell a similar story.







33

Key driver analysis confirms that perceiving security guards as being well-educated and/or having had a personal experience drives trust in the profession more broadly

Relative importance scores in driving overall trust in security officers/guards (e.g., door supervisors, and retail guards)*

Perceive them as well educated 37% **Attitudes** In it to earn a wage than protect the public 5% Attitudes were newly added for the 2023 analysis. The perception that security towards Combined score of Often poorly trained 4% personnel are well educated is the most important driver of trust (37%), while security Poorly paid and treated 3% **52%** other attitudes tend to matter much less as they account for less than 5%. personnel Some susceptible to corruption 2% Door supervision 11% Security guarding 9% Personal experience accounts for 34% of the overall variance in the key driver Personal Public space surveillance 3% analysis model. Prior experience with door supervisors was the most important Combined score of experience in Sporting event stewarding 3% driver of trust (11%), followed by experience with those in security guarding 34% the last 6 Cash and valuables in transit 3% roles (9%). Personal experience with other roles tends to matter much less, all months Close protection 2% 4% or below. Event stewarding 2% Key holding 1% Believing roles are regulated does have a small impact on overall trust in the Lisensed - Security guarding 6% **Regulation** / Combined score of sector, but the effect is fairly limited. A belief that security guarding roles are Licensed - Door supervision 3% sector licensed, for example, has a relative importance score of 6%. Awareness of SIA Want a mix of public and private security 2% 11% balance has essentially no independent effect on overall trust (1%). Heard of Security Industry Authority (SIA) 1% Demographics matter much less, with just three variables statistically significant. Combined score of Age: '<34 years VS >35 years 2% Demographic Young people, respondents in ethnic minority groups and those in the highest Ethnicity: 'Ethnic minority VS NOT 1% 3% characteristics* social grade (SEG A; typically those from a household with a higher managerial SEG: NOT A Vs A 0% chief income earner) are more likely to trust security officers (2%, 1%, and 0%, respectively).



*Relative importance scores illustrate the percentage of variance explained by the model broken down by each variable. A higher score indicates more predictive power of the variable in question. In other words, a higher score means the variable is more important in explaining overall levels of trust in trust in security officers/guards (our overall trust metric).

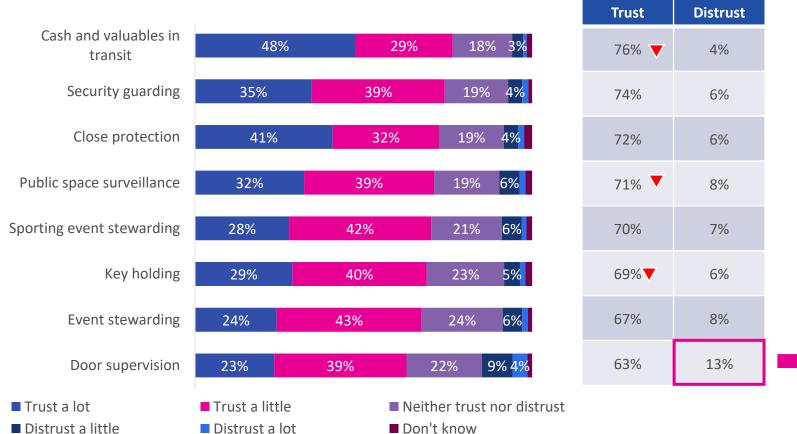


34

R-Square of model: 20.64%. All variables have been charted even if not statistically significant. The only exception is demographic characteristics where only the statistically significant demographic variables have been kept in the model.

Door supervision remains the role that stands out as one where trust is lower





Trust in specific security roles

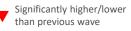
Confidence that people in each specific security role tend to 'act with integrity and do the right thing' and that they tend to 'carry out their duties competently and effectively' follow a similar pattern to trust levels, with door supervision being where sentiment is poorer.

There has also been a slight decline in trust for those working in Cash and valuables in transit (81% in 2022 to 76% in 2023), Public space surveillance (74% to 71%) and Key holding (72% to 69%) roles in Private Security.

Distrust in door supervision is significantly higher than many other security roles. The following demographic groups are also more likely to say they distrust door supervisors:

- 16-24 year olds: 18%
- Gay, Lesbian, Bisexual people: 20%





As in 2022, door supervision is also the profession where more interactions are negative – though most still have positive experiences



Interaction in last 6	Whether most recent exp	perience was pos	itive or negative (l	ast 6 months)		
months					Positive	Negative
8%	Cash and valuables in transit (238)	55%	26%	15% 3 <mark>%</mark>	81%	4%
9%	Public space surveillance (250)	46%	33%	14% <mark>5%</mark>	78%	7%
8%	Key holding (227)	40%	38%	19% 2 <mark>%</mark>	78%	3%
17%	Sporting event stewarding (457)	37%	41%	14% 5%	78%	7%
5%	Close protection (166)	41%	37%	15% <mark>5%</mark>	77%	7%
22%	Event stewarding (621)	38%	38%	15% 6%	76%	8%
22%	Security guarding (635)	40%	31%	21% 6%	71%	8%
25%	Door supervision (717)	34%	35%	17% 8% 6%	69%	14%
	Very positive		Fairly positive			

Encouragingly, more than half are positive about all their most recent interactions with individuals in every private security role.

Door supervision stands out as the role where a relatively high percentage of the public interacted with the position (25%) in the last 6 months and where a relatively high proportion of interactions were negative (14%).



D01. Have you had any interactions with people working in any of the following roles in the last 6 months? Base: All respondents (2621)

Neither positive nor negative

Very negative



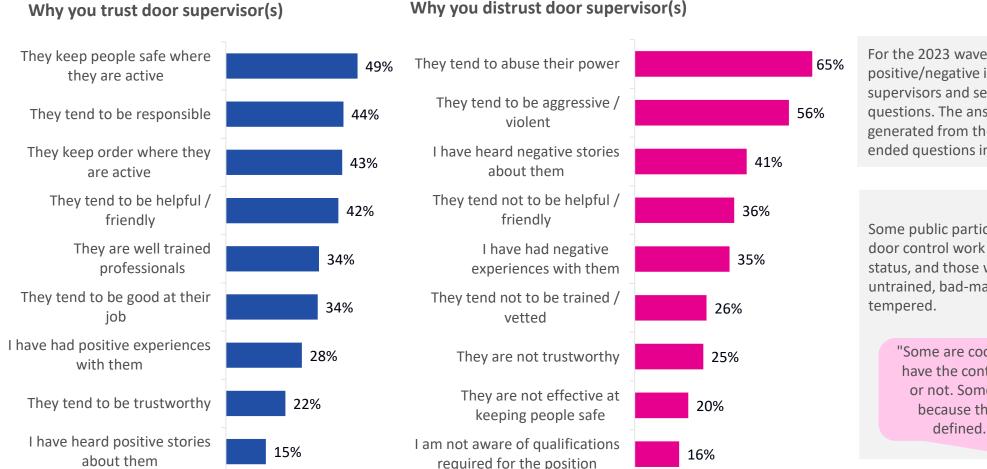
D02. And thinking about your most recent interaction, how positive or negative was you experiencing of dealing with the person(s) working in this role? Base: All with interaction, unweighted bases shown in parentheses

Fairly negative

Don't know

The main reason for trust in Door Supervisors is that they keep people safe, similar to 2022 – while those who distrust them mention abuses of power and aggression/violence





For the 2023 wave, the questions about positive/negative interactions with door supervisors and security guards were closed questions. The answer options were generated from the coded themes of openended questions in the 2022 wave.

Some public participants associated door control work as poorly paid and low status, and those working in the role as untrained, bad-mannered, and quick-tempered.

"Some are cocky and arrogant. They have the control to let someone in or not. Some can misuse power, because their role is not welldefined." (Female 30-49)

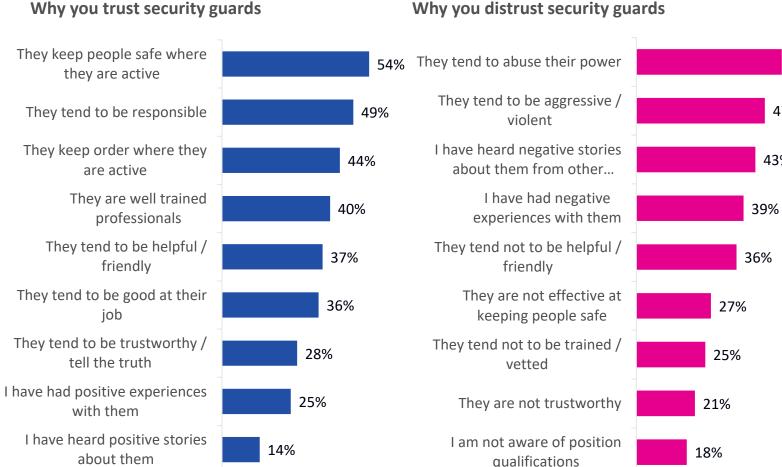


B05_A. You said that you trust door supervisors. Why is this? Base: All who said they trust door supervisors, allocated on a least fill basis (937). B05_C. You said that you do not trust door supervisors. Why is this? Base: All who said they do not trust door supervisors, allocated on a least fill basis (238).



Security guards are also trusted for keeping people safe and distrusted due to abuses of power and aggression/violence





Why you distrust security guards

For the 2023 wave, the questions about positive/negative interactions with door supervisors and security guards were closed questions. The answer options were generated from the coded themes of openended questions in the 2022 wave.

53%

47%

43%

Some public participants said they were more likely to trust door control private security over other public-facing private security roles.

"I don't trust private security in the same way [as paramedics], but it depends on the role and who they are working for. If it is a nightclub, I would trust them rather than someone in a shop, as they profile me." (Male, 18-29)



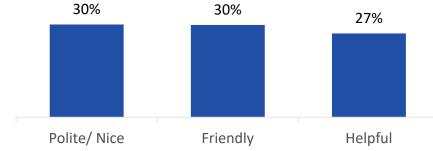
B05 B. You said that you trust those who work in security guarding roles. Why is this? Base: All who said they trust security guards, allocated on a least fill basis (1110).



38

B05 D. You said that you do not trust those who work in security guarding roles. Why is this? Base: All who said they do not trust security guards, allocated on a least fill basis (106).

Security professionals being polite, friendly and helpful were the main reasons for positive experiences with them – in both licensed and unlicensed roles

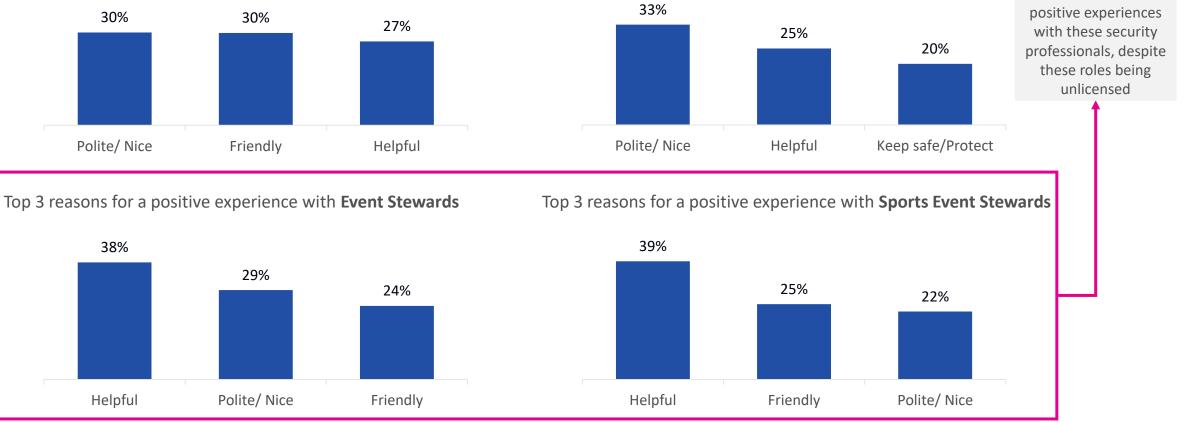


29%

Polite/ Nice

Top 3 reasons for a positive experience with **Door Supervisors**

Top 3 reasons for a positive experience with **Security Guards**





38%

Helpful

D03 a/c/e/g. You mentioned your most recent experience with someone in a door supervision / security guarding / event stewarding / sports event stewarding role in the last 6 months was positive. Can you tell us more about this experience? Why was it positive? Base: All with a positive experience (328;289;287;215)

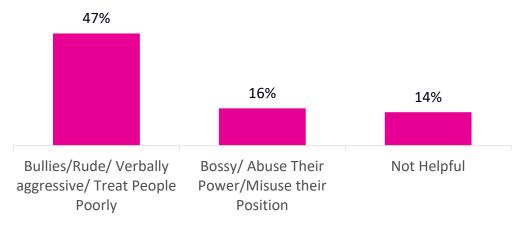


Similar reasons for

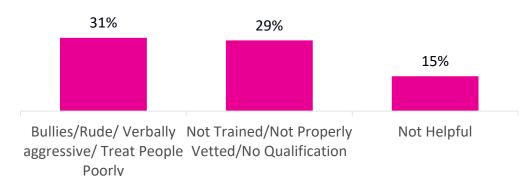
Those citing negative interactions with door supervisors typically mention bullying and verbal aggression



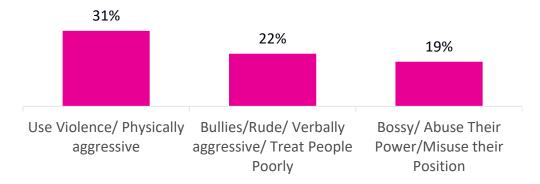




Top 3 reasons for a negative experience with Event Stewards*



Top 3 reasons for a negative experience with **Security Guards***



Top 3 reasons for a negative with **Sports Event Stewards***

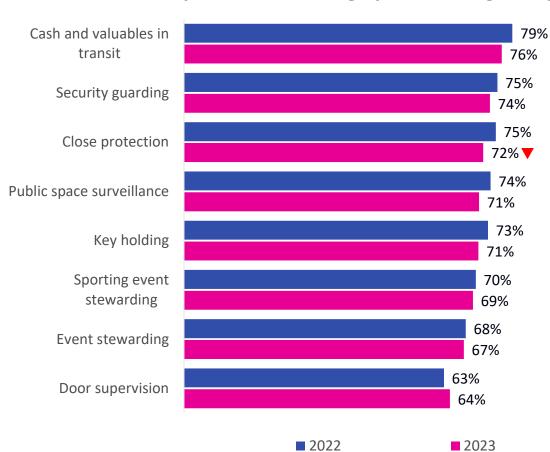




D03_b/d/f/h. You mentioned your most recent experience with someone in a **door supervision / security guarding / event stewarding / sports event stewarding** role in the last 6 months was negative. Can you tell us more about this experience? Why was it positive? Base: All with a positive experience (82 ;16; 30; 20) *Base size below 50 for negative interaction.

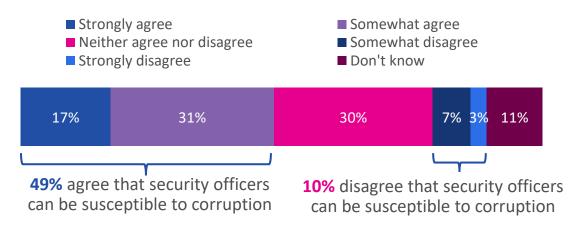


Most of the public has confidence in all security roles to act with integrity, yet half agree that some security officers can be susceptible to corruption



Confidence in security role to act with integrity and do the right thing

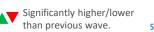
Extent to which agree / disagree that some security officers can be susceptible to corruption



While half (49%) agree that some security officers can be susceptible to corruption, this figure was much higher among Men (54%) and younger people (54% 16-34 year olds). Those with a household income over £60,000 (55%) or living in London (55%) are also more likely to agree that security officers can be susceptible to corruption.



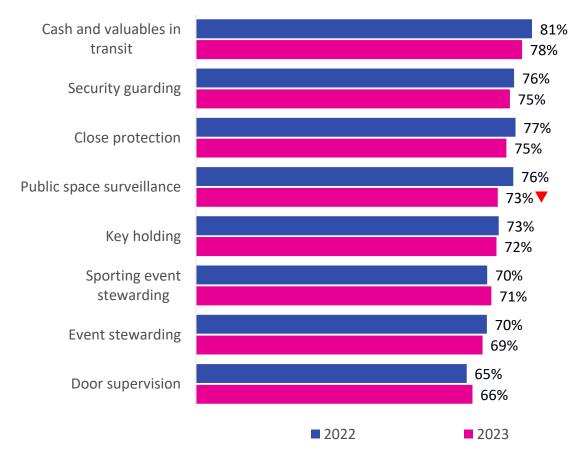
B06. And how confident, if at all, are you that people in following security roles tend to act with integrity and do the right thing? D04. Some security officers tend to be susceptible to manipulation / corruption / bribery. To what extent, if at all, do you agree or disagree with the following statements? *Some security officers tend to be susceptible to manipulation / corruption / bribery*. Base: All respondents, 2022 (2,597); 2023 (2,621)



A majority of the public also have confidence in all security roles to carry out their duties competently



Confidence in security role to carry out their duties competently and effectively



More trusted roles were those who worked with higher-status individuals (e.g. celebrities or politicians), following the assumption that they were better paid, more qualified, and had been vetted to a higher standard than those private security who work in public-facing roles.

Vetting was a key consideration for the public, with some questioning whether background checks were required in some private security roles at all, and others wondering whether the requirements for vetting increased with job status. Perceptions of job 'status' broadly mirrored the survey findings.

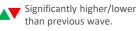
> "Maybe the higher the level, the more clearance you need." (Female, 30-49)

Perceptions around presentation may be related to the perceptions of competence, with some members of the public describing "the way they dress" impacting the interaction. One participant admiringly described a small Cardiffbased firm that adapted its uniform to the job, in "neat polo shirts" when securing day-time events and "in suits and ties" at football matches.



B07. And how confident, if at all, are you that people in the following security roles tend to carry out their duties competently and effectively?

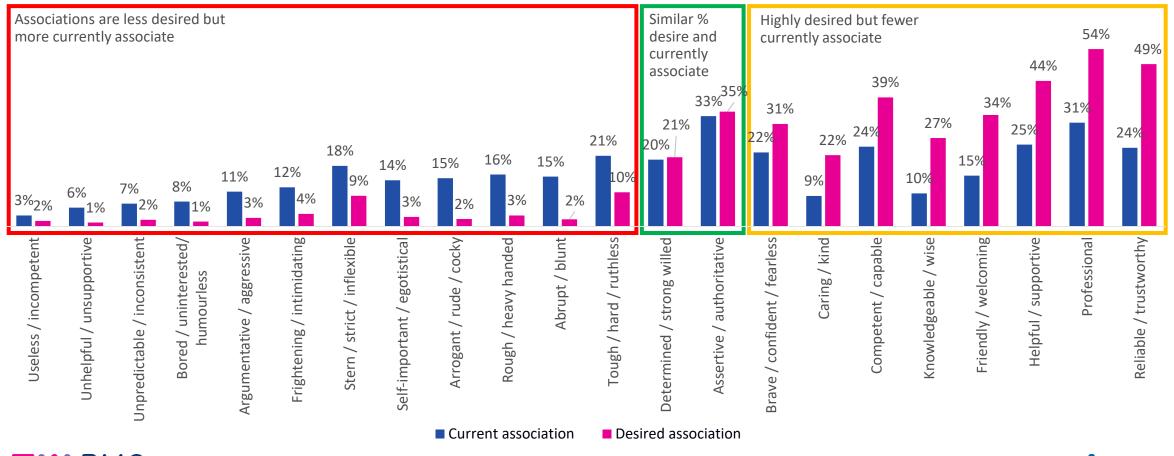
D04. Some security officers tend to be susceptible to manipulation / corruption / bribery. To what extent, if at all, do you agree or disagree with the following statements? *Some security officers tend to be susceptible to manipulation / corruption / bribery* Base: All respondents, 2022 (2,597); 2023 (2,621)



Respondents want security officers/guards to be professional, reliable, helpful and competent but think they are arrogant, heavy-handed and blunt



Personality traits: Sorted by gap between current and desired associations





B08. When you think of security guards/officers, how would you typically describe their personality? B09. Which personality traits do you think a security officers/guards should possess? Base: All respondents (2621)

43

Participants identified personality traits among security officers which were linked to their role. Desired traits centred on "softer skills" and cut across roles



Current traits

- Depends on the nature of the role:
 - For retail and nightlife confident, tough, aggressive, rude, "a bit scary", overbearing, "no common sense", presume guilt
 - In offices personable, good communicators
 - **CCTV surveillance** an eye for detail, technical skills
- Some participants acknowledged that they may be stereotyping, and the security officers could have a range of traits.

"[Door security for nightlife] are on a power trip, [they] just love that control and power to say 'you can come in, and you can't'." (Female, 30-49)

Desired traits

- Participants did not pair desirable traits with particular security roles; instead, traits were seen as cross-cutting:
 - Courtesy, empathy and compassion
 - Approachable and trustworthy
 - Diplomacy and staying calm under pressure
 - Able to diffuse a situation and "use the right words at the right time"
 - Charisma and "some form of presence"

"[Security officers need to have] empathy and compassion, because the incidents usually come off the back of high emotions, or mental health crisis, or a dependency of some sort, so there's got to be a bit of humanity brought into it." (Stakeholder)





Technology could be used more routinely, to drive trust and to increase the effectiveness of security workers



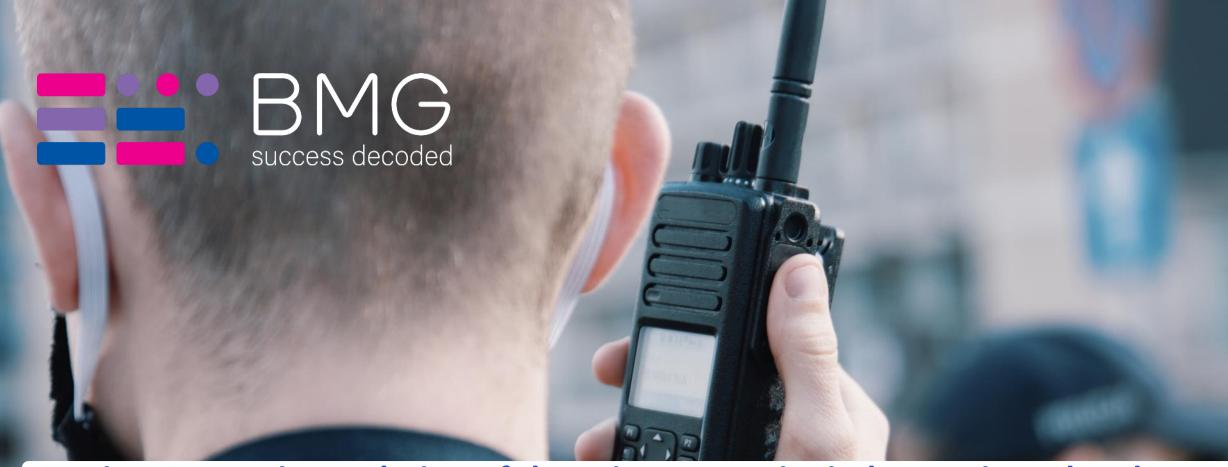
- Taking advantage of developments in technology was one major difference between the expectations the public had of private security and what the stakeholders thought the public wanted from them. None of the stakeholders spoke about using more (and more advanced) technology to help them in their work.
- When asked how trust in officers could be improved, suggestions included requiring the wearing of standardised uniforms, badges, and bodycams – "filming makes them accountable".
- Some participants (particularly those with poor experiences) favoured a 'Rate my Security Officer' app (like Uber), or at least making it clear where someone could go to report a negative interaction.

"You can see that the industry has not been able to keep up. Businesses are creating cupcovers to prevent spiking, for example. There is a gap in the market where they can help the public directly, as security hasn't been able to do that." (Female, 18-29)

"Over the years, everything has changed [...] So why [are] there not more security measures to avoid stabbing, etc.? There needs to be more technology to support security; it feels old-fashioned." (Male, 18-29)







Section 3: How is regulation of the private security industry viewed and understood?



Section summary – Understanding Regulation

- Many still think the balance between public and private security is about right: Around two-fifths (42%) of the public think the balance of security conducted by the police and the private sector is about right. However, a third (32%) believe more security work should be done by the public sector, an increase since 2022. Younger adults are again more likely to support more work being done by the public sector on average (45% of 16 -34 year olds).
- The public feels that the roles of private and public security plays are distinct from one another: Despite an increase in the view that more security work should be done by the public sector, most believe that private security fills a resource gap that would be impossible for the police to fill (66%) and that the roles of private and public security are different and should remain separate (63%). This is in line with 2022 (67% & 63% respectively)
- Awareness of the SIA is low but has increased: 33% say they have some awareness of the SIA, which has
 increased from 28% since 2022. Awareness of the SIA ranks in line with other regulators, such as the
 Independent Office for Police Conduct (37%), but is higher than regulators, such as the Youth Justice
 Board (21%). Focus group participants were mostly pleased to hear that the sector was regulated but
 wanted to know what actions they could take to hold security professionals accountable.
- Most believe all security roles are and should be licensed: A majority still believe each of the private security roles are and should be licensed. This is even the case for roles that are not currently licensed event stewards (57% think they are licensed, and 62% think they should be) and sporting event stewards (62% & 66%). However, when licensing was explored in the focus groups, very few were aware of what it entailed.
- The badge-license and license did not increase public trust: The public were familiar with the badge-license that public facing security professionals wear but it did not inspire trust in the person or reassurance that there were certain standards they worked to. Many did not know what licensing entailed or how people were trained, and were sceptical that such a relatively short, easy, and low-cost course could sufficiently prepare security officers for their role.

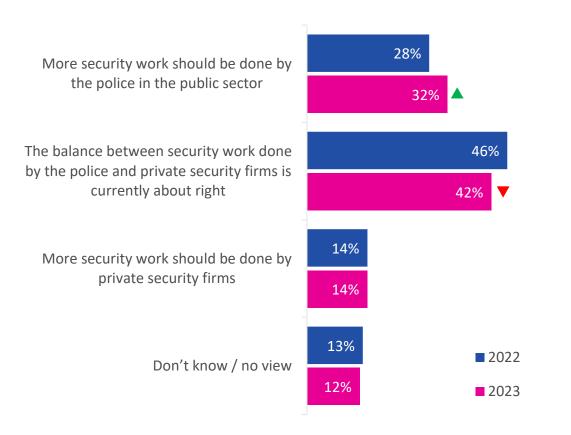




While most think the balance of police and private sector is about right, an increasing share think the public sector should be doing more security work



Balance between security work done by police and private security



Differences by age	16 to 34	35 to 54	55+
More police	45% 🔺	30%	24%
Balance between police and private security firms is about right	38%	43%	44%
More private security firms	8% 🔻	14%	19% 🔺

Younger groups are more likely to think more work should be done by the police rather than private security, whereas older groups are more likely to believe the opposite.

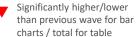


In the public focus groups, there was a feeling that it had to be clear who was responsible for the security staff when they were operating in public spaces.

"Hospital security should be employed directly by the [NHS] Trust, for transparency. Shops can employ who they like. There's a big difference in levels of accountability between the two." (Female, 50+)

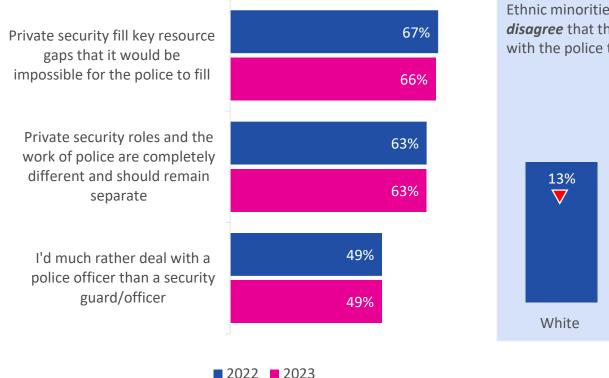


C04. Thinking about the current mix of public sector and private sector security work, which of the following is closest to you view? Base: All respondents, 2022 (2,597); 2023 (2,621)



A majority believe private security and the police have distinct roles which complement one another and that private security fills key resource gaps – in line with 2022

Perceptions of police vs private security roles



Ethnic minorities are more likely to disagree that they would rather deal with the police than a security guard



Public participants saw private security and the police as having distinct roles.

Police were generally perceived as more approachable, patient, conversational, and trained to respond to high-pressure situations.

"[The police have] got to be everything now, haven't they? They're social workers [...] They deal with every single different, difficult type of person [...] so they've got to have every single trait you could have." (Female, 50+)

Some participants described the police as more trustworthy than private security, as they protect the public rather than a company's interests. However, others' perceptions of the police had been damaged by media reports and their own experiences. One participant from an ethnic minority background described the police as "aggressive" and how she felt more comfortable around private security officers.



The vast majority believe all security roles - including event and sport stewards – are licensed, the same as 2022



Although lower, most people still feel that

sporting and event stewarding are licensed. 83% 83% 82% 82% 79% 78% Do not have to be licensed 74% 74% 71% 70% 69% 68% 62% 61% 57% 56% Close protection Cash and valuables in Security guarding Door supervision Public space Key holding Sporting event **Event stewarding** surveillance transit stewarding

Perceptions towards which security roles definitely or probably are licensed



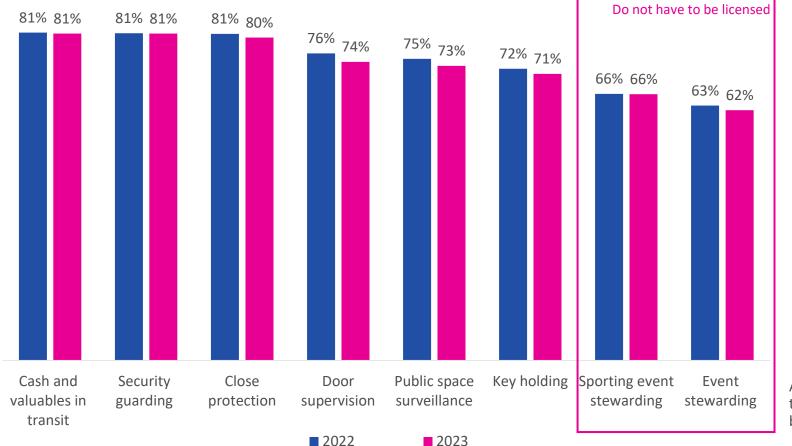
C01. As it stands, do you think the following have to be licensed by a regulator to work within the private security industry, or can they currently work in these roles without a license? Base: All respondents, 2022 (2,597); 2023 (2,621)

2023

2022



Most also believe that all security roles *should* be licensed – similar to 2022



Perceptions towards which security roles should be licensed

Public participants felt that most, if not all, security roles should be licensed.

They were definitive that roles that involve "putting their hands on someone" needed to be licensed. However, some participants queried whether security officers in CCTV roles needed to be, as they were not publicfacing.

Although lower, most think stewarding roles both should be licensed



C02. And do you think individuals should have to be licensed by a regulator to work within the private security industry, or should they be able to work in these roles without a license? Base: All respondents, 2022 (2,597); 2023 (2,621)





The public were familiar with the badge-license, but it did not inspire trust in the person or reassurance that there were certain standards they worked to



- Public participants had perceptions of inconsistent or unregulated standards in the industry. Some knew that security officers were licensed and had seen security professional badge-licenses but did not know what that meant or entailed.
- Some participants had the impression that decisions made by private security are "arbitrary" and "inconsistent", leading to questions around professional standards and a perceived lack of accountability. This was particularly in relation to door control, where trust has been lower in the survey.
- Participants were most concerned about thorough background checks and training. This was an important point, especially for those who had a poor experience with private security; they wondered about accountability and the official process of complaining.
- Stronger regulation, including regulation and licenses for the businesses that rely on private security, was a strong driver of trust – as long as auditing and spot checks on licensed officers were carried out routinely and by an independent body.

"You see they have a badge [license] on their arm. They have to be registered, but not necessarily have the background checks or the training." (Male, 30-49)

"There doesn't seem to be consistency. Out to late night bars, there's no consistency in how rules are applied; let someone in or not for any reason at all." (Male, 18-29)

"People know to look for the license and picture...but recently things are going wrong with licensing so the [industry's] reputation has been damaged" (Stakeholder)





The public do not know what to expect from a private security officer in a challenging situation



- Stakeholders believed that the public expected them to be able to handle challenging situations and be competent in skills such as first aid. Some were concerned that the public had the misconception that private security had the means to contact emergency services more directly and quickly than the public.
- One stakeholder did note that the public might not consider that private security officers might offer a wider set of competencies for various emergencies, such as support during a mental health crisis or evacuation.
- The public were uncertain what it was realistic to expect, in terms of their skills and authority, from private security officers. From the focus groups we know that the level of expectation is relatively low: many did not know that first aid is part of initial training, and did not rate highly security officers' ability to manage challenging or dangerous situations (especially door supervisors, who many thought could actively incite confrontations).
- This builds on our findings that the public think of the private security industry as having inconsistent standards (page 52)

"People do think you have a fast line to the police – we don't." (Stakeholder) "Throughout our lives we encounter private security...so it would be nice to know the detail on how they are trained, what they should be doing, how they are checked [vetted]." (Male, 50+)

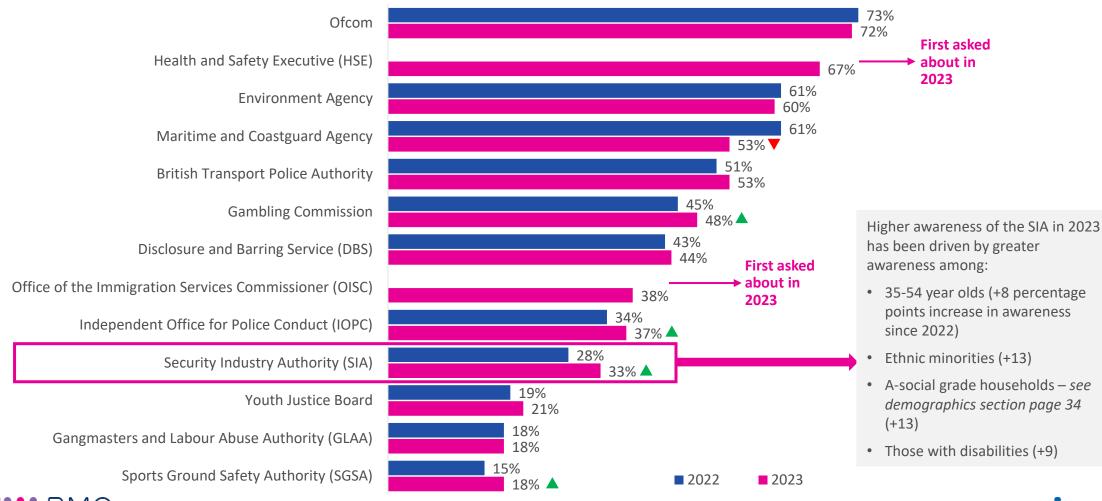
People think we're just there to stop people from stealing. People do not think that security officers could support in a mental healthcare crisis, or help them in an emergency calmly and safely." (Stakeholder)





Awareness of the SIA is low compared to other regulators but has significantly increased since 2022

Awareness of regulators





C03. Please indicate whether or not you have heard of any following regulators? Base: All respondents, 2022 (2,597); 2023 (2,621)

54

Security Industry Authority

ificant change ir

awareness since 2022

Awareness of the SIA was low among public focus group participants, but on learning about them during the focus group, they felt more reassured that the industry was regulated



- Public participants had generally not heard of the SIA before the focus groups. Where they were aware, they referred to the "yellow armbands" worn by security officers. Some participants did not know the SIA by name, but assumed the armbands were issued by a regulator of some sort.
- Participants were largely positive about the industry being regulated, feeling it made the industry "more reliable" and trustworthy.
- However, information about the SIA given in the focus groups caused confusion among some public participants and prompted questions about:
 - \circ $\;$ Who the SIA is accountable to
 - There were mixed reactions upon learning the SIA reports to the Home Office, ranging from feeling reassured to concerns about "undue political influence"
 - \circ $\;$ Which security roles does the SIA license
 - What private security companies have to do to get a licence
 - Whether the public can make complaints about security officers to the SIA

"The SIA need more teeth [...] We are an industry crying out for regulation." (Stakeholder)

"I'm so confused about the role of the SIA if I can't complain to them. Where's the accountability? What about if I wanted to raise a compliment about someone doing their job too? Who are they [the SIA] protecting? Themselves [the industry] or us?" (Female, 30-49)



55



Awareness of the ACS was similarly low among public focus group participants. On learning about it during the focus groups, it was considered a positive scheme, but its voluntary nature was seen as a limitation



- Public participants had generally not heard of the ACS before the focus groups.
- Based on the information given during the groups, participants felt it was a good scheme in theory and would demonstrate that an approved contractor was committed to providing a higher standard of service, engendering greater trust in them, and therefore encouraging organisations to use approved contractors.
- However, its capability was undermined by it being voluntary/"a rubber stamp".
- It was also felt that renewals should be required more often than every 3 years.

"All it tells me is that this company has enough money [...] to get this accreditation [...] to make them look better." (Female, 50+)

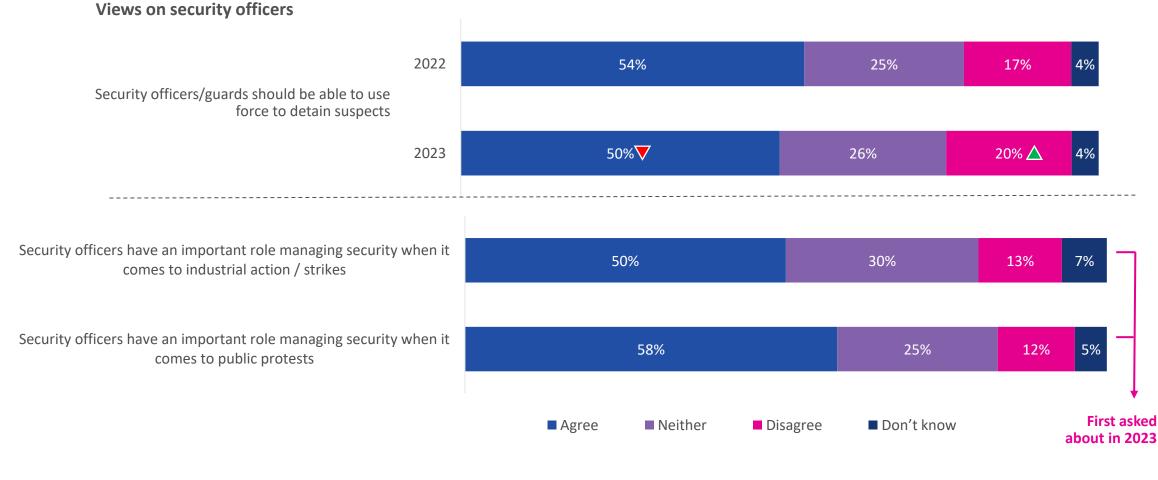
• Some stakeholder participants queried the resource-intensive nature of the application process, which was seen as time "wasted" if the company did not get approval. Some also felt it duplicated the DBS process.





Around a half think that the security officers should have the ability to detain subjects, manage security at strikes and public protests







Significant change in awareness since 2022 Security Industry Authority



Section 4: How do the public view careers in private security?



Section summary – Careers in Security

- 7 in 10 say a career in security is a career to be proud of: 7 in 10 (68%) say private security is a career to be proud of, which aligns with the research in 2022 (69%). A greater proportion feel that private security is a career to be proud of than professions in sectors such as retail/groceries (63%), catering (60%), and warehouse/logistics (60%).
- Private security is more likely to be viewed as a good secondary job than a first-choice career: Those who viewed Private Security as a good first-choice career remained at similar levels in 2022 (both 40%). However, a greater proportion (59%) viewed the profession as a good secondary job which could be used to boost income. The public perceptions that this is not a first-choice industry was confirmed by many stakeholders in focus groups who said they 'fell' into it.
- Security officers are still viewed as poorly treated and in high-risk careers: Security officers are more likely than not to be considered as poorly treated (44% agree c.f. 12% disagree), in line with the results from 2022. Three-fifths (61%) also agreed that a career in the industry is dangerous and high-risk.
- Over two-fifths to view security officers/guards as often 'poorly trained': In line with the 2022, over two-fifths (43% c.f. 44% in 2022) view security guards as often poorly trained. From the focus groups, a few participants had very little idea of what training security guards have, and some recommended training which was already linked to licensing. All this suggests there is a need to communicate to the public the training security professionals undergo.

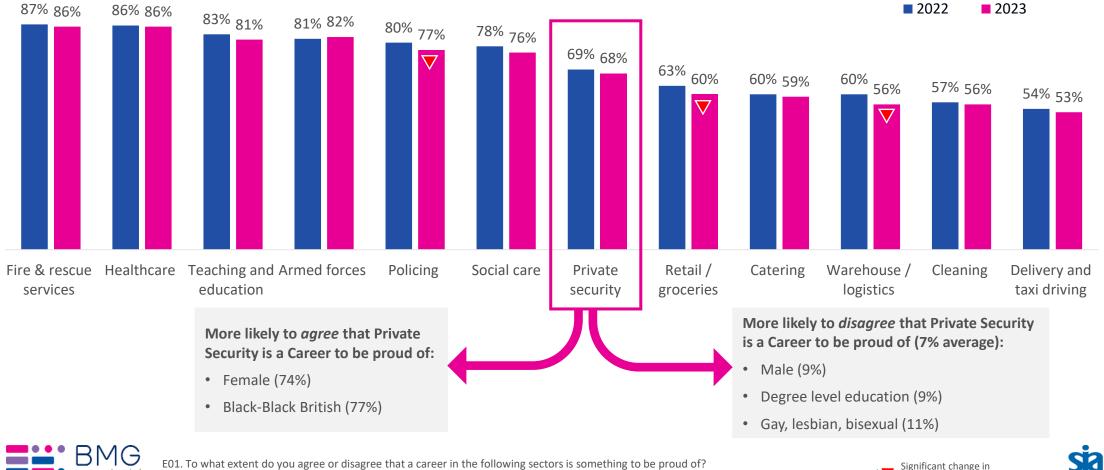




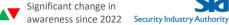
Private security is considered by most as a career 'to be proud of' – but is still only mid-ranking when compared to other careers



% agreeing that each profession is a career 'to be proud of'



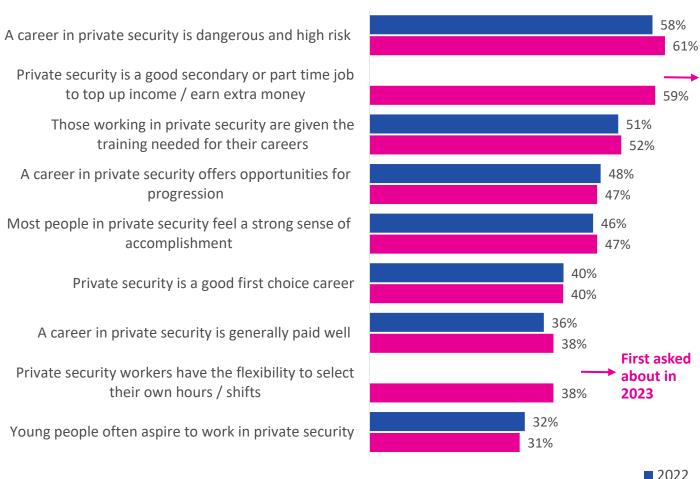
Base: All respondents 2022 (2,597); 2023 (2,621)



Careers in the security industry are seen as good secondary jobs but are seen as quite high-risk. Views are in line with 2022



Perceptions towards careers in private security



First asked

about in

2023

2023



"I do not see the [career] steps going upward." (Male, 18-29)

In line with survey findings, public participants saw private security as "really dangerous" and high-risk. For this reason, women described never considering it as a job, due to their physicality. It was also seen as a low-paid job (participants were thinking about security guarding and door supervision roles).

A perceived benefit was that there would be good remuneration for long and/or unsociable hours. Depending on the nature of the role, others were that it was a "cushy" job, and that it would enable greater involvement in hobbies or interests, such as music or football.

"I think [stewarding] would be a great job. I'd love it; you can watch football all day." (Male, 30-49)



E02. Thinking about careers in private security, to what extent, if at all, do you agree or disagree with the following statements? Base: All respondents 2022 (2,597); 2023 (2,621)

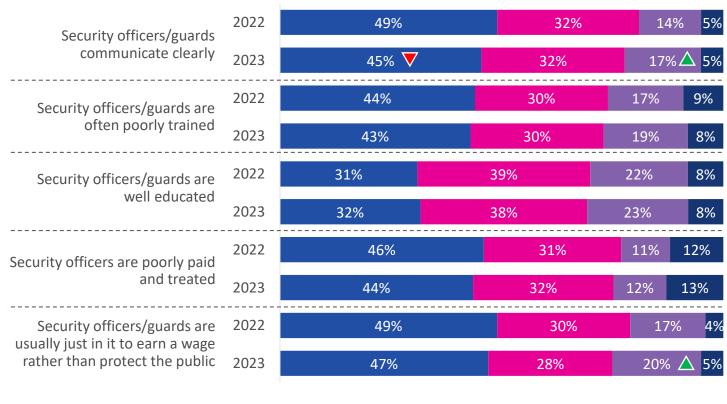


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Those working in the private security industry are more likely than not to be viewed as poorly trained and poorly treated, in line with 2022



Views on security officers (% agree)



■ Agree ■ Neither ■ Disagree ■ Don't know



Public participants viewed security officers as not highly educated or well trained. This was felt, in part, to be because the SIA licence was "cheap" to obtain and so did not attract "high calibre" people.

Participants generally lacked awareness of what training security officers received. Some guessed that they might get First Aid training, some sort of de-escalation training, and would need to be DBS checked.

"I have no idea what kind of training they do. Not a clue." (Female, 30-49)

Participants believed that a lot of people working in private security came from public security roles e.g. the police and military. As such, they felt that their private security roles might benefit from previous training they had received.



Significant change in awareness since 2022

Security Industry Authority

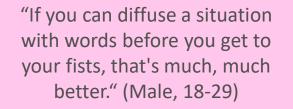
Public and stakeholder participants recommended training for security professionals that are included in licence-linked training

Focus group participants recommended security professionals are trained in:

- First Aid "as standard", with frequent refresher sessions both public and stakeholder participants saw security officers as a type of first responder
- Conflict resolution/de-escalation techniques
- Communication skills "foundational stuff about how you treat people"
- Resilience
- Unconscious bias (raised by public participants from ethnic minority backgrounds)
- Other job-specific training, depending on the nature of the role, i.e. a security officer working in a hospital should have more training than one in a supermarket.

Public participants also suggested some form of psychological profiling to ensure officers selected for private security roles can respond to high-stress and "volatile" situations.

Recommendation of licence-linked training also suggests there is a lack of awareness of what skills security careers require.



"Someone without resilience and who did not have a tough skin, he would not survive in a security job." (Male, 50+)

"Training? You need customer skills; need to know how to keep a situation calm. Basically: people skills." (Stakeholder)





Stakeholder focus group participants wanted to shift the public's perception of the security industry, so that jobs in the sector were held in higher esteem



- Stakeholders were generally proud of their jobs and the wider industry and were keen for public perception to mirror this.
- They felt that much of the "good work" the industry does is "invisible" and wanted careers in private security to be held in the same regard as public security roles, such as the police and prison service, which they felt were more respected.
- To achieve this, they recommended public-facing communications focusing on:
 - Private security as a career where you can help and support people
 - Enabling the development of key and transferable skills, such as communication and people management.
- They also wanted communications underpinned by greater government investment in training and apprenticeships.

"[Security companies need to] show that [employees] are going to be nurtured and brought along, and that there is a bigger career." (Stakeholder)

"You can make a national contribution with a career in security, and pick up some amazing transferable skills as well." (Stakeholder)



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Final thoughts



Observations

AREA	What is working well	What could be improved	How it might be improved
Traits and training	 Participants' recommended training already being delivered as part of licensing Positive, customer-focused traits drive trust Perceptions of quality training drive trust 	 Positive traits that the public want from private security are not actually seen in security officers / guards Increase public's awareness of security professionals' skillsets developed when becoming licensed and in CPD 	 Encourage recruitment and training for desired skills and traits Focus first on roles with lower trust Raise awareness of existing training content Showcase the different types of people already in the industry
Public expectations	 Public feels safer in private security presence Majority trust security officers Trust is higher in all professionals who are seen as there to 'help people' 	 Public don't know what to expect from private security workers (skills possessed, professional standards, authority and ability to intervene or help in challenging situation) 	 Raise awareness with public on what they can expect from private security workers Show how to raise a complaint, if necessary
There to help	 The perceptions of the industry are improving with younger people in particular Stakeholders agree that private security jobs are purposeful (helping others) Stakeholders agree that exciting and impactful work is happening in the industry, but it is 'hidden' 	 Many think private security is to protect property, not people Public only notices the value of private security when 'something goes wrong' 	 Promote the positive values embodied by those working in the security industry Promote that it is an industry about protecting people, not just property Share stories/ comms about the positive differences made
SIA's Reputation	Public is reassured by regulation in generalIncreased awareness of SIA since 2022	There is ambivalence to SIA as a regulator.Not a key driver of trust overall.	 Share a clear strategy for change
Licensing	 Public already agrees that security roles should be regulated Some stakeholders want higher standards and more enforcement 	 Licensing and its requirements is opaque, and not fully trusted by the public or those in the industry 	 Tell the public on what is involved in training and licensing someone, and how it prepares them for their role
Career	 Public has positive perceptions of roles which help people This is a diverse industry, with diverse roles Public say role in private security is a job to be proud of Public feel private security jobs are necessary 	 Private security tends not to be a first-choice career Perceptions of pay, working conditions, and opportunities to progress are quite poor 	 Generate more insights into what motivates people to choose careers in similar industries (but not private security) Promote the diversity of roles available





Initial ideas on what could be improved, and how

TRAITS AND TRAINING

- What is working well: The training expectations that the public and stakeholders agree on independent of one another (e.g. first aid training and customer experience) and
 some are part of licence-linked training which many security professionals should already have. For the public, positive, customer-focused traits drive increased trust, as does
 the perception that a professional has received high-quality training and vetting.
 - What could be improved: Many of the public indicate that there are many positive traits and tendencies they want security professionals to possess that they do not feel they actually possess. The public remains unsure on how security professionals' skillsets are developed when becoming licensed, and in CPD
 - How it might be improved: Tell the public what skills all licensed security professionals possess, and what this means for them. Encourage recruitment / training for a diverse range of skills, and increase awareness of the specific skillset that those working in private security develop. Roles where there is lower trust (e.g. door supervisors) should be the focus of any training. In addition, promote the diversity of roles available and different types of people who already work in the industry.

PUBLIC EXPECTATIONS

- What is working well: The public already thinks that security officers are there to help and feel safer in their presence in many different locations. Trust is higher in professionals who are available to 'help people', so this aspect of the role should be promoted.
 - What could be improved: There is a lack of clarity on what to expect from security officers, such as what action they can take in a challenging situation; and what professional standards they work to.
 - How it might be improved: Clearer messaging with the public around what they can expect private security workers in (a) their deportment and interaction with the public, (b) training (e.g., de-escalation, first aid) and (c) where they can raise a complaint if their experience falls short of these standards.

THERE TO HELP

- What is working well: Young people have more positive associations with private security, based on their personal experience there is an opportunity to capture and share these stories. Stakeholders agree that jobs are purposeful (helping others), help to develop transferable skills, and that there is diversity of interesting and impactful work. These factors just need to be promoted.
- What could be improved: Many of the value and positive impacts of the private security industry are hidden from the public as few have interactions with security professionals. Many think private security is to protect property, not people
 - How it might be improved: Emphasise the positive values embodied by people working in the security industry and stories about the positive difference they make. As above, promote the diversity of roles available and different types of people who already work in the industry. Promote that it is an industry about protecting people.





Initial ideas on what could be improved, and how

REGULATION

- What is working well: The public is reassured by the presence of a private security regulator. Supportive of this, more of the public is aware of SIA than in 2022.
 - What could be improved: We found that there is ambivalence towards the SIA as a regulator, with some of the public not knowing what its purpose is (even if they were familiar with the acronym and badge system). Stakeholders would also like more enforcement of licensing and standards.
 - How it might be improved: the SIA needs to be specific about the challenges it is facing, what it wants to achieve, and its strategy. Transparency, clarity, and wide dissemination are important to build trust.

LICENSING

- What is working well: The public already agrees with the principle that roles should be and are regulated.
 - What could be improved: The public thought licensing is opaque, and are unsure about what it entailed, leading to lack of confidence in SIA and the industry.
 - How it might be improved: Aim for complete transparency with the public on what is involved in licensing someone (link to comms about what the public can expect from licensed SOs) and how the training is relevant/ prepares them for their role.

CAREER

- What is working well: Many that jobs are purposeful (helping others), help to develop transferable skills, and that there is diversity of interesting work. People are attracted to roles and industries that aim to help people; this is a diverse industry; the public already thinks this is a job to be proud of; people know this is a necessary and important job; as above, Stakeholders agree.
 - What could be improved: We found that private security was not a first-choice career, likely as a result of the previous challenges and perceptions that a
 security career is 'high risk' and something that people 'fall in to'. Perceptions of pay, working conditions, job security, and opportunities to progress are
 quite poor
 - How it might be improved: Generate more insights into what motivates people to choose careers in similar industries (but not private security). It is important to understand more about this before developing communications to promote the security industry. Promote the diversity of roles available.





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