



SEPTEMBER 2021

REPORT SUMMARY

SECURITY 2025

A ROADMAP FOR THE FUTURE



This document is a summary of the full research report prepared by the *Australian Security Research Centre for the Australian Security Industry Association Limited.*

The full report is available at www.asial.com.au.

THE AUSTRALIAN SECURITY INDUSTRY

\$11+BN

Estimated annual revenue generated by the Australian Private Security industry is approximately \$11+ billion

180K

Employing over 180,000 people, including over 153,000 licensed security personnel, the Private Security industry is significantly larger than the combined size of Australia's police and defence forces



- The Australian Private Security industry encompasses a diverse range of products and services; this is reflected in the wide range of services provided.
- Governance for the Australian Private Security industry is state/territory based, with licensing eligibility requirements varying between jurisdictions (industry-based certifications are not considered with regards to personal or organisational licensing).
- Training units required for licensing must all be endorsed under the Australian Qualifications Framework (AQF) Vocational Education and Training (VET) framework.

***Analysts forecast
3% annual industry
growth between
now and 2028***

Future Readiness

Private Security

The key steps that Private Security Providers (individually and collectively) can take to be future ready were identified as:

- Promoting the Private Security industry as a career of choice
- Standardising Private Security industry training and licensing
- Improving and increasing the profile of security professionals in corporate governance
- Professional certifications
- Upskilling, cross-skilling and redefining the role of security personnel
- Improving the profile and public image of security officers
- Establishing and maintaining a united industry voice
- Linking remuneration with qualifications and certifications
- Expanding the role for crisis management with government agencies
- Provide market education and awareness for both security service providers and users
- Embracing technological innovation
- Being attuned to market disruptors

Regulators

The key steps that regulators can take to be future ready were identified as:

- Establishing a Security Industry Coordination Office
- Regulatory consistency and reciprocity
- Improved compliance and enforcement
- Industry education
- Industry liaison
- Consumer education

Consumers

The key steps that clients and consumers can take to be future ready were identified as:

- Liaison with industry associations
- Consumer education
- Improved procurement practices
- Industry standards





Australian Security Industry Association Ltd (ASIAL)

Finally, the key steps that ASIAL can take to assist the industry's future readiness were identified as:

- Raising awareness among security service providers and users
- Providing industry thought leadership
- Strengthening its role as the peak security industry body
- Providing stronger advocacy to government
- Establishing a greater role in the national security area
- Conducting applied industry-based research
- Being recognised as the trusted resource on security matters
- Developing industry standards and guidelines
- Improving the role and standing of security management in corporate governance
- Developing professional certifications
- Supporting the industry's adoption and integration of technology

WHY THE AUSTRALIAN SECURITY INDUSTRY IS IMPORTANT

As part of Australia's national security mix, the industry performs a vital role in the national economy.



Economic Contribution

Private security industry is a vital contributor to the Australian economy.



Flexibility & Agility

Private security industry has proven flexibility and agility in responding to client needs.



Force Multiplier

Private security industry has seen its role expand significantly to now also be considered as a force multiplier and a surge capacity contingency for public sector agencies (eg. COVID-19 response).



Business Enabler

The Private Security industry provides sophisticated business solutions to optimise government and business operations – outputs which represent significant value-adds to their operations.



National Security

The Private Security industry is a significant contributor to national security, protecting critical government and corporate infrastructure.

WHERE THE AUSTRALIAN SECURITY INDUSTRY IS AT NOW

Provision of Private Security Services



The overall pattern of core service provision has remained consistent over the past five years. We expect this to continue.



Changes in systems and technologies have resulted in growth in building automation, electronic and cybersecurity service provision and demand.

Use of Private Security Services

Projected growth in electronic and cybersecurity service usage and demand is set to move ahead of protective and physical security demand. This will also include an increased focus on security convergence.

INDUSTRY SWOT ANALYSIS

The following industry strengths, weaknesses and threats, and opportunities were identified via the online survey, as well as stakeholder interviews and workshops.

Strengths



Collaboration

Growing collaboration between the security industry, law enforcement and government agencies



Integrity

Compliance and organisational leadership



Flexibility and agility

Ability to adapt quickly and upscale (offering a wide range of services)



Economic contribution

Able to readily assist government agencies, in response to societal needs, as a force multiplier



Career opportunities

Professional and diverse workforce that provides a stable and consistent source of employment



Licensing

A regulated industry with entry level requirements



Innovative technology

Strong industry technical standards and a wide range of innovative technical options to complement protective security services, with ongoing improvement of data management and analytics systems.



Public-private sector links

Collaborations between private and public security continues to increase and improve, ranging from being a force multiplier to assisting in alarm/response triaging



Value Adding

Contributes to improved business efficiencies and resilience

Weaknesses and Threats



Training and licensing

Inconsistent application of training standards and licensing requirements.



Perceived lack of career

Lack of clear career pathways.



Ineffective compliance enforcement

Need for more effective compliance and enforcement by regulators to address concerns of misconduct and organised crime.



Regulatory consistency

Lack of effective regulatory compliance and enforcement of professional standards



Image and reputation

Poor public perception based on an outdated understanding of the industry.



Industry fragmentation

At times, the industry can appear fragmented due to its diversity and scope.



Regulatory vulnerabilities

Potential for infiltration by organised crime due to inadequacies in regulatory standards.



Sham contracting

Underpayment of wages and entitlements in the protective security services sector.



Unrestricted sales of security technology

Non-security industry businesses selling electronic security equipment without an in-depth appreciation of often complex interface issues, and without the same policies/licences required by those person/businesses operating within the security industry.



Industry competition from cyber and information technology providers, and other market disrupters

External providers are challenging and changing industry practices and service delivery models, doing so via offerings ranging from data driven and network-based services/products, to the largely unregulated provision of off-the-shelf and do-it-yourself solutions.

With regards to the former, a significant gap has been observed in that whereas ICT (information and communications technology) providers have cybersecurity experts, the security industry arguably does not. Although the differences between the industries are blurring, the professional demarcation between disciplines appears to continue, and what is a potential market share opportunity will subsequently remain as being a threat if this current gap in capability is not addressed.

Whilst technology companies such as Google and Amazon immediately come to mind in terms of electronic security market disruptors, Bunnings Warehouse is also considered in this category, particularly with regards to do-it-yourself security products that can be purchased and installed without due consideration of the associated system interface and vulnerability issues. Although originally aimed at the domestic market, there has been an observed expansion of the same into small sized businesses/organisations as well.



Adopting technology

Slow and siloed adoption of new technology.



Client/market education

Customers have a limited appreciation of underlying issues, and do not know what "good" looks like.



Industry voice

Need for stronger industry advocacy across all sectors of the industry.



Opportunities



Licensing standards and recognition

Establishment of a national security licence scheme, or an effective and practical mutual recognition system between the states and territories.



Role in national security

All facets of security industry to be considered as part of the national security framework.



Industry thought leadership

ASIAL to champion the industry, providing strategic and thought leadership.



Return on investment, and not just a business cost

Be seen as a value add and business asset, as opposed to merely an ongoing cost aimed at loss reduction.



Technology integration

Actively engage in education to better integrate technology and associated capabilities into industry service offerings. Leverage technology and develop internal industry cybersecurity capabilities to provide market differentiation, turning a potential threat from other sectors into an opportunity via the provision of integrated product and service offerings.



Improved public image

Reporting of positive aspects of the industry to better convey that the industry is actively working to protect the Australian community.



Career of choice

Security industry to be considered a professional career, with recognised industry certifications and ongoing professional development.



Industry/market education

Work to improve efficacy in the procurement process and educate broader market as to what "good security" looks like.



Collaboration

Private security companies working together to leverage co-operation and partnerships to better meet the needs of clients.

DIRECTION THE AUSTRALIAN SECURITY INDUSTRY IS HEADED IN 2025

The following emerging security threats and trends were identified via the online survey, as well as stakeholder interviews and workshops.

THREATS

Figure 14 Emerging security threats, as identified by security service providers

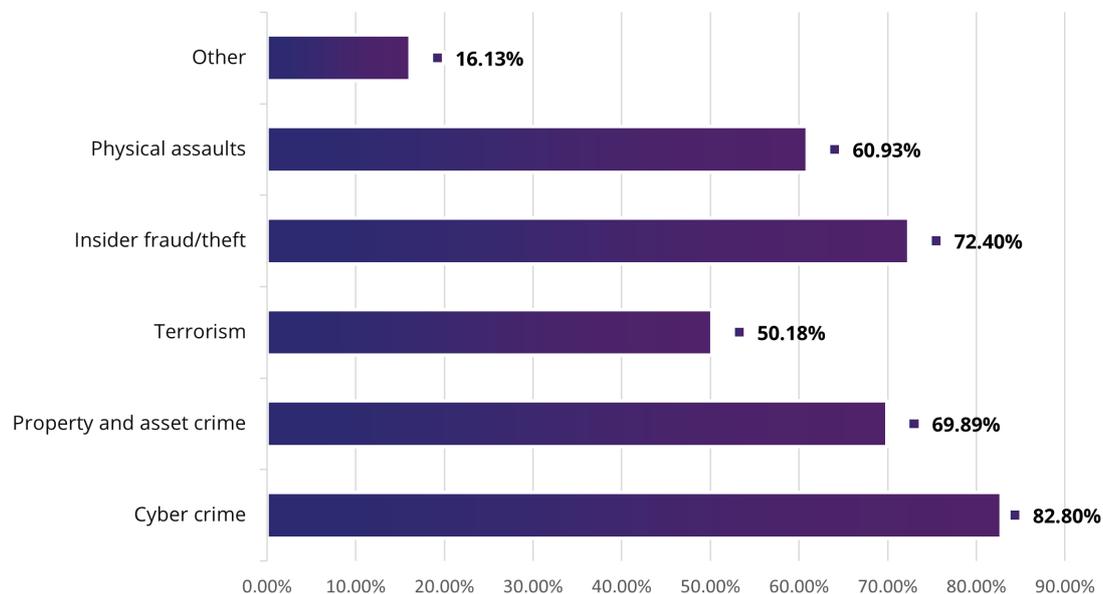
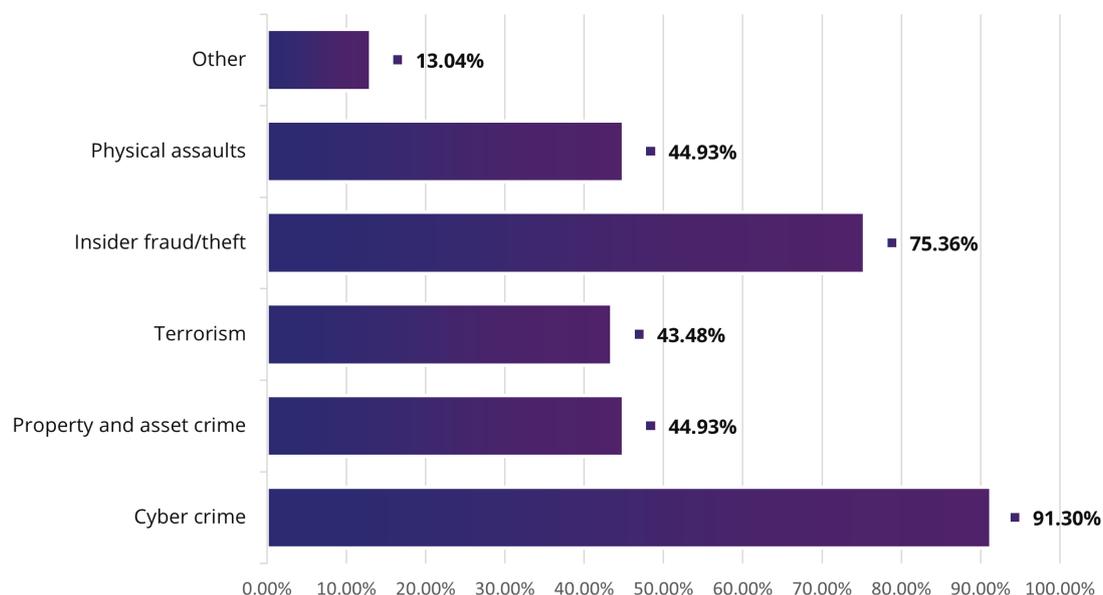


Figure 15 Emerging security threats, as identified by security service users





Changing threat profile

Increasing levels of activism and customer aggression, as well as increased incidence of cyber and insider threats, foreign interference, and espionage.

Changing business environment

Ongoing change in business models, with a greater dependence on partnerships and movement between sectors.

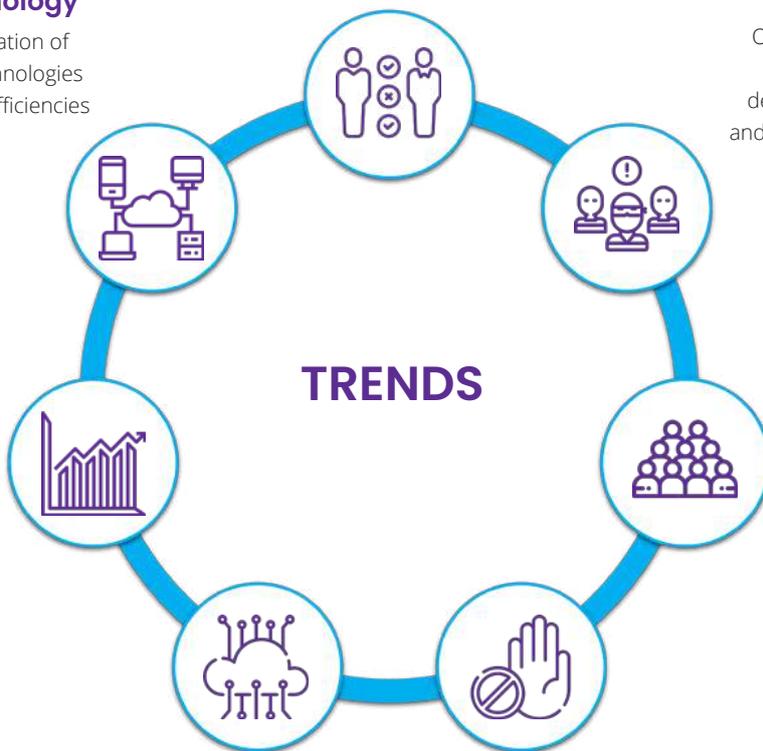
Emphasis on technology

Increasing use and integration of automation and digital technologies to strengthen operational efficiencies

Upskilling

To meet future workforce needs, upskilling of personnel, whether in the electronic or personnel sector is required.

TRENDS



Increasing demand

Increased demands for services across all aspect of the security industry, by both the private and public sector.

Increased data focus

The use of data and cloud-based technologies will continue to increase, providing real-time information and operations coordination for security professionals, both private and public sector.

Reluctance to change

Some elements within the industry appear resistant to change and have been slow to adopt new technology – issues which are discussed further in the next section, Mega Trends.



Mega Trends

10 mega trends were identified in relation to emerging technologies

- 01** Artificial Intelligence (AI) 
- 02** Cybersecurity 
- 03** Predictive Data Analytics 
- 04** Connectivity and IoT (Internet of Things) 
- 05** Cloud-Based Computing 
- 06** Move to Service-Based Business Models 
- 07** Touchless and Frictionless Solutions 
- 08** Facial Recognition 
- 09** Responsive Environments and Intelligent Spaces 
- 10** Data Privacy 

GLOBAL ISSUES, CHALLENGES AND OPPORTUNITIES SHAPING THE INDUSTRY'S FUTURE DIRECTION



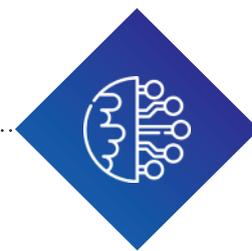
The ever-increasing **cyber threat** constitutes a major risk exposure to persons, critical infrastructure, and a range of sectors. But these threats are counterbalanced by opportunities for the Private Security sector. The industry's diversity, scope, and collective resources means that consulting, infrastructure and service provision, and research and development will continue to provide opportunities in the future.



The threat of **terrorism** does not recognise national borders and does not differentiate between public and private sector organisations. The Private Security industry plays a crucial role in Australia's national security, as well as internationally where Private Security personnel are often the first to identify and respond to acts of terrorism prior to a law enforcement or military response. This provides both opportunities and challenges in recruitment, training, and deployment practices.



The Australian Private Security industry is significantly larger than the Australian police and defence forces combined, and it continues to grow. The COVID-19 has seen an increase in demand for security personnel and a concurrent reduction in security personnel and crowd controllers employed in the live entertainment industry. There is a pressing need to **up- and cross-skill** security personnel in other roles within the industry.



While **digitisation** presents challenges for the Private Security industry, these are outweighed by potential advantages arising from new construction technologies, smart building and community designs, and leveraging collaborative platforms and networks for improved public safety and commercial efficiencies. The digitisation of the Private Security industry will continue, and the key is to use digitisation to augment and improve the capabilities of contemporary security officers trained in its application.



Adopting a cradle-to-cradle **sustainability approach to technology and operational practices**, will allow the Private Security industry to make more informed procurement decisions and employ operational practices that optimise use of sustainable technologies. Failing to embed sustainability drives risks relating to issues of cost, speed and responsiveness, quality, and exposure to the uncertainty of disruption. On the other hand, opportunities include being better able to navigate physical and regulatory risks, meet market expectations, and more easily adapt to changing technology/business practices, and uncertainties linked to climate change.



Recent global events have seen a rapid change in business practices, and the need for **cybersecurity and ensuring data privacy** has never been more critical. Although the industry is potentially well-placed in this regard, it needs to remain mindful and responsive to industry trends and directions.



There is an almost universal trend towards **social responsibility** – operations that are ethical and beneficial for society – and the size and public profile of the Private Security industry means that there is an opportunity for the industry to have a significant impact, especially in utilising green technology, smart devices, and staffing practices.

WHAT WILL "GOOD" LOOK LIKE

The term "best practice" is frequently used, but is rarely defined. The following issues were identified via stakeholder interviews and workshops as to what participants, as a sample of security service providers and users, consider to be "best practice" for the industry as it moves towards 2025 and beyond.



Industry innovation & thought leadership

ASIAL providing industry leadership in the form of strategic direction, innovation, and representation, governance by members of the Private Security industry.



Training and education – professional development

Having access to standardised training and certifications, ranging from technical apprenticeships and tiered officer licensing, to management and leadership development.



Governance

Increased levels of due diligence, accountability, and governance by members of the Private Security industry.



Standardised licensing and certifications

The establishment of national/ mutually recognised security licence and professional certification schemes.



Improved public image as a profession

Increased levels of trust and confidence in the private security industry.



Improved client/ market procurement

More informed service end-users, moving from being cost to need focused.



Multidisciplinary and system integration

The provision of holistic security offerings and solutions to end-users.

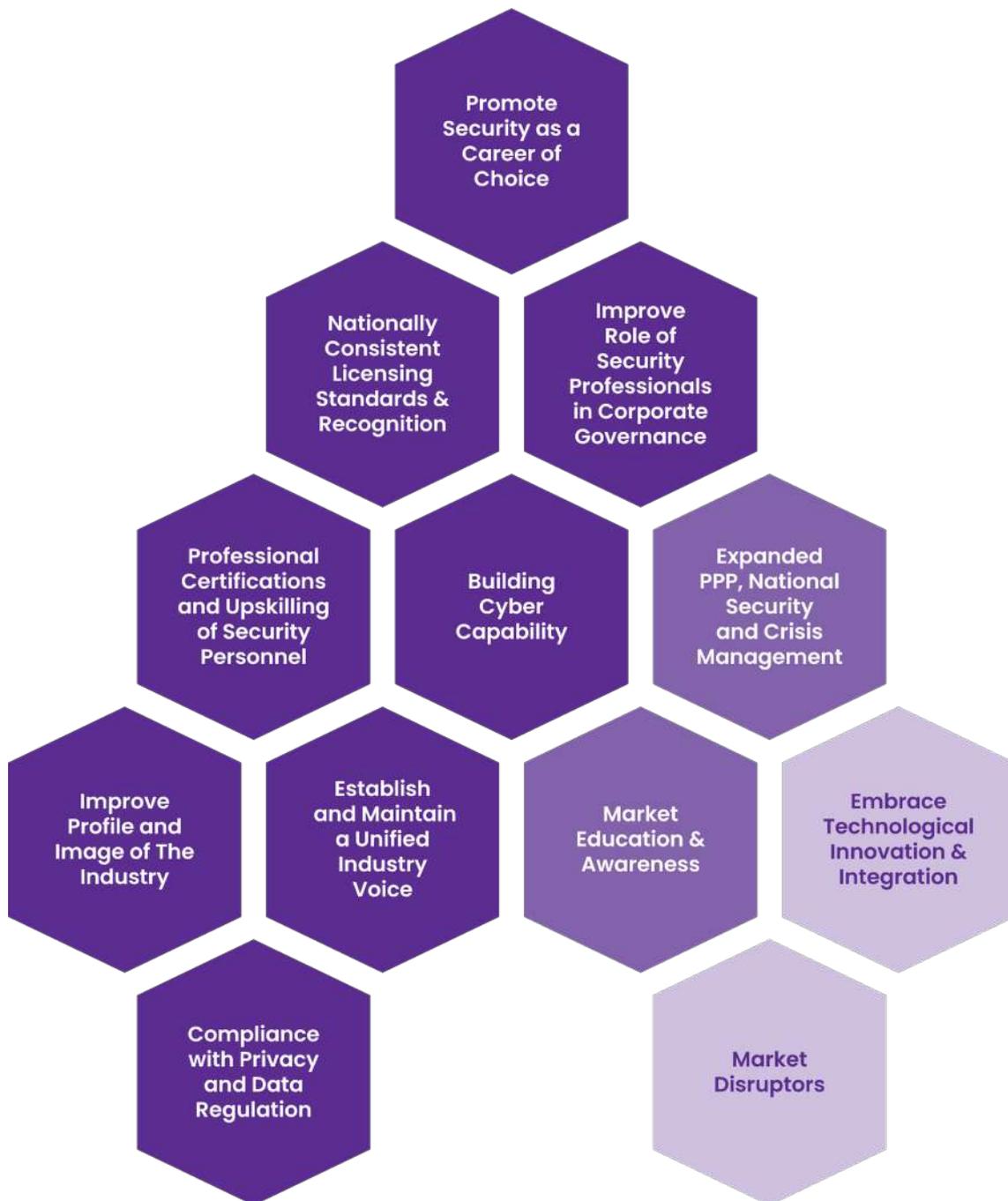


Seen as a career

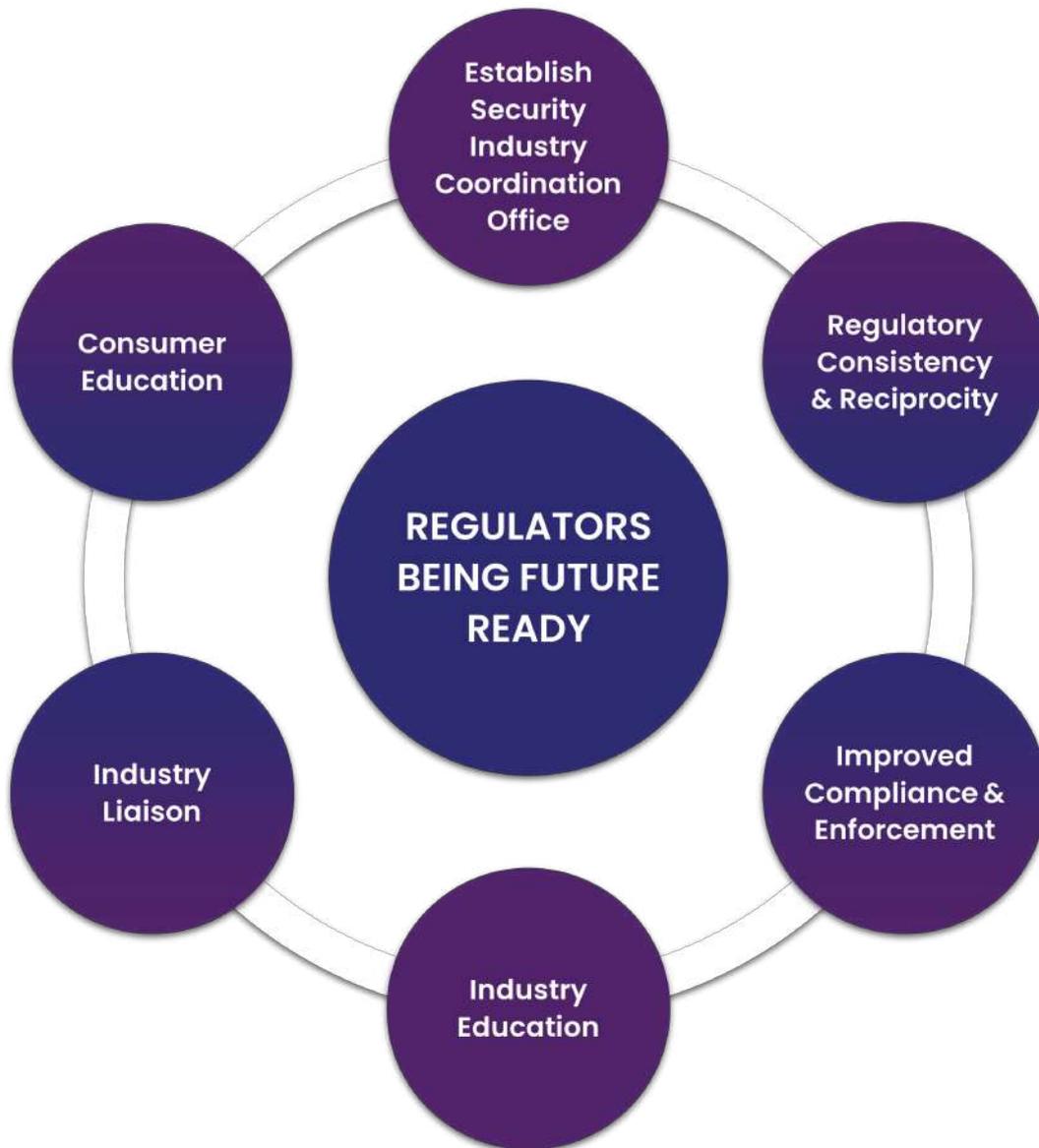
Private security to be seen as a profession and career of choice.

KEY STEPS FOR AUSTRALIAN PRIVATE SECURITY PROVIDERS TO BE FUTURE READY

Key steps that Private Security Providers (individually and collectively) can take to be future ready:



KEY STEPS FOR AUSTRALIAN REGULATORS TO BE FUTURE READY



KEY STEPS FOR CLIENTS AND CONSUMERS TO BE FUTURE READY



“Transparency, sustainability and ethical procurement practices must underpin the procurement process.”

HOW ASIAL CAN ASSIST WITH FUTURE READINESS



Raising awareness among security services providers and users



Providing industry thought leadership



Strengthening our role as the peak body for security professionals



Being an industry advocate to government and business



Establishing a greater role in the national security area



Conducting applied industry-based research



Being recognised as the trusted resource on security matters



Developing industry standards and guidelines



Increasing the role and standing of security management in corporate governance



Developing professional certifications and ongoing professional development opportunities



Supporting the industry's adoption and integration of technology



CONCLUSION

The Private Security industry in Australia has undergone a series of changes and scope expansions. The industry needs to be able to adapt and move forward within the changing operational and commercial environments, especially the impact of technological advancements and innovation.

Technological advancement is both a threat and opportunity to the industry and, while the sector is highly regarded for its agility and responsiveness, it also encounters challenges in the way it is perceived, both within and from outside the sector.

All stakeholders of the Private Security industry have a role in growing and evolving the sector towards 2025. This journey needs to be facilitated and managed so that opportunities can be realised.

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About the Research Process

The research for this report employed a four-method approach, with this consisting of a literature review, an on-line survey, facilitated on-line workshops, and semi-structured interviews with industry representatives – each of which are detailed below.

Literature Review

The source documents selected for the literature review were chosen from a range of recognised peer-reviewed and industry-based journals, government agency publications, and associated conference proceedings. In order to ensure that an appropriate scope of content was considered, such was determined by the issues identified in this report's introduction, as well as by those wider issues raised by both the semi-structured interviews and facilitated workshops, and the source documents themselves as the review of literature progressed.

Online Survey

The online survey was undertaken utilising the SurveyMonkey platform. Consisting of 16 questions, the survey addressed issues associated with perceived industry strengths and weaknesses, current and emerging trends, and changes in service provision – both current and anticipated. Demographic filters ranged from organisation size and years of security industry experience, to specific industry sector and service focus.

The survey was distributed over a period of 2 months via the following avenues:

- Distribution to security sector industry bodies
- Open distribution through targeted LinkedIn and Facebook groups
- Internal distribution through the ASIAL member database
- Open distribution/invitation at industry events

Facilitated Workshops

A total of 7 x 90-minute facilitated workshops were conducted on-line, with participants being allocated into the following cohorts:

- Small sized security businesses
- Medium sized security businesses
- Large sized security businesses
- Related businesses (locksmiths, engineers, technology, installers etc)
- Law enforcement
- Regulatory agencies
- Cybersecurity

These workshops focused on exploring issues ranging from perceived strengths and weaknesses of the security industry, to also discussing issues relating to perceived threats and opportunities. In addition, emerging threats and industry trends were also discussed, as were critical success factors, and what "good" would actually look like for the security industry as it moves beyond 2025. Finally, participants were also given an opportunity to raise additional issues and to contribute personal commentary.

Semi-Structured Interviews

A total of 18 x 30-minute semi-structured interviews were conducted with key industry representatives. As with the above workshops, these interviews focused on exploring issues pertaining to perceived strengths, weaknesses, opportunities, and threats for the security industry. Issues relating to emerging threats and industry trends were also discussed, as were critical success factors, and what "good" would actually look like for the security industry as it moves beyond 2025 – with participants again being given an opportunity to raise additional issues and to contribute personal commentary.

About the Australian Security Research Centre (ASRC)



The ASRC was established in 2006 to coordinate and promote independent, collaborative research and discussion on the broad concept of the security of Australia.

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Potential Limitations

The research team is confident that this project constitutes the largest of its kind to be undertaken in Australia to date, both in terms of its scope and size. Although the final sample size for the survey was admittedly limited to 349 respondents, this sample included representatives from across the different sectors of the security industry, and encompassed both service providers (n = 280) and consumers (n = 69) from a range of companies. This confidence is also based on the consistency of the issues raised and discussed by the participating parties throughout both the survey and workshops/interviews. The research team, authors and ASIAL take no responsibility for the use, misuse or interpretation of information and findings in this report by any party. Please contact the research team or ASIAL should specific information or application considerations be required.



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