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ORIGINAL ARTICLE

Size matters: measuring the private security industry in the United Kingdom

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Abstract
The private security industry has become a central feature of the plural policing landscape in the United Kingdom. As such, it has received considerable attention in both academic and policy circles. Yet, perhaps surprisingly, there remain notable question marks over its precise size and shape. With this in mind, the article draws upon data from the Security Industry Authority and the Office of National Statistics Business Register and Employment Survey to measure the sector along three key dimensions: the number of private security officers, the number of companies and turnover. This novel methodological approach reveals a complex and contested picture of what the sector looks like at a fundamental level and, at the same time, allows for a reassessment of commonly deployed indicators such as growth rates and the ratio of private security officers to police officers during key time periods such as the Covid-19 pandemic.

Keywords Private security · Police · Size · Labour market · Covid-19

Introduction

Over the past half century the private security industry has become a prominent feature of everyday life in the United Kingdom (UK). Once an economic backwater characterised by small firms and a largely untrained labour market, it is now an expansive sector dominated by multinational corporations employing a workforce which is licensed by the state, subject to government-mandated training and engaged in broadly similar functions to the police (and much more). Indeed, during the first

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wave of the Covid-19 pandemic, the Government conferred 'critical worker status' upon private security officers performing a variety of 'essential' functions such as: maintaining social order in hospitals, test centres, vaccination centres and supermarkets; protecting commercial premises, industrial estates and goods supply-chains; and supporting police patrols, custody suites and emergency call-outs (White 2023). Looking ahead, the soon-to-be-introduced 'protect duty' or 'Martyn's Law'—an initiative arising from the Manchester Arena Inquiry which places greater responsibility upon large venues to engage in counter-terrorism measures—will further integrate the industry into the UK's counter-terrorism architecture.[1] The industry, in other words, is assuming an increasingly central role in the UK policing landscape.

As the industry has expanded, so too has scholarship on the buying and selling of security products and services in the UK. Key themes in the literature are: sources of demand in the market (Loader 1999; Jones and Newburn 2002; Zedner 2003); the everyday activities of frontline private security officers (Wakefield 2003; Button 2007; Kostara and White 2023); relations between these officers and other actors across the policing landscape such as police officers, police community support officers and counter-terrorism agencies (Crawford et al 2005; Gill 2015; Stephens-Griffin et al 2021); political lobbying, strategizing and decision-making (White 2010; Thumala et al 2011; Booth 2019), forms and effectiveness of industry regulation (George and Button 1997; Loader and White 2017; Kostara 2021); and how the industry compares to its counterparts in other countries (Jones et al 2010; Leloup and White 2023; Puck and White 2024).

Throughout these analyses, one of the first points of order is, quite understandably, establishing the size of the UK industry. For the past 20 years, the default method for doing so has been to cite the number of private security officers licensed by the Security Industry Authority (SIA) —the public regulator brought into effect through the provisions of the Private Security Industry Act 2001. The open availability and seemingly self-evident reliability of this data means that, most of the time, little extra thought is given to questions of size. This is problematic, however, because although these data are certainly robust they also remain inherently limited. As Jones and Newburn (1995) noted three decades ago, any comprehensive attempt at measuring the size of the industry needs to cover not just the number of private security officers but also the number of companies and turnover in the sector. When establishing the size of the industry it is therefore important to incorporate additional datasets which bring such variables into the equation.

With this in mind, the purpose of this article is to measure the size of the UK private security industry using not only SIA data but also the Office of National Statistics (ONS) Business Register and Employment Survey (BRES). This dataset has been selected for three reasons. First, it rests upon a robust data collection strategy. Second, it measures the number of private security officers in the sector, but using a different calculation method to the SIA, thereby offering an alternative reading of this key measure. Third, it also covers the number of companies and turnover in the sector, thus addressing the most conspicuous blind spots in the SIA data. Comparing

[1] See: https://commonslibrary.parliament.uk/research-briefings/cbp-9799/.

these datasets, then, facilitates a more complex and contested picture of what the industry looks like at a fundamental level and, at the same time, allows for a reassessment of commonly deployed indicators such as industry growth rates and the ratio of private security officers to police officers.

The article focuses on the period 2008–2021 for two reasons. First, because SIA and ONS BRES data are directly comparable between these years. Second, because this timeframe allows us to reflect upon how the industry fared during key events of interest to scholars in the field, such as the 2009–2010 recession, the 2010–2015 police budget cuts, the 2016 Brexit referendum result and subsequent exit of the UK from the European Union in 2021 and the 2020–2021 Covid-19 lockdowns. It is important to emphasize, however, that the article does not use these time periods to explain dynamics in the sector. Rather it simply describes trends during these turning points and critical junctures for purposes of illustration.

The article is divided into four sections. The next section provides context by reviewing attempts to measure the UK private security industry in the academic literature. The following section profiles the SIA and ONS BRES data collection strategies. The subsequent section presents data drawn from these sources. The ensuing section analyses these data. The concluding section reflects upon the different ways of measuring the industry and their implications for future research. Before commencing with this analysis, however, it is important to add a caveat. The article concentrates primarily on what has traditionally been called the ‘manned’ but what is perhaps better viewed as the ‘labour-based’ private security industry, which for the most part encompasses private security officers performing static and mobile protection, investigation and detention duties in private or quasi-public spaces. It does not focus on the ‘technology-based’ industry, which revolves around the manufacture, installation and maintenance of locks, safes, alarms, CCTV, cybersecurity software and so on. As Button (2020, p. 154) observes, there are many ‘grey areas’ in these distinctions. For instance, private security officers will often use a range of technologies when carrying out their everyday activities. Some of these grey areas are resolved within the specific methodologies of the SIA and ONS BRES datasets. But others remain at large and should be kept in mind when reading the subsequent analysis.

Context

When commentators began to take an interest in the UK private security industry about 50 years ago, estimating its size was a somewhat loose affair since there was no institution keeping official count. A few examples illustrate this point. At the beginning of the 1970s, Randall and Hamilton (1972, p. 67) calculated that the industry employed approximately 40,000 men—the majority of whom (25,000) were engaged in guarding, patrolling and cash-in-transit activities—and was worth approximately £70 million. Later that same decade, Bunyan (1977, p. 230) raised the number of officers to no less than 250,000 working for around 7,000 companies. The following year, however, Bowden (1978, p. 249) lowered the number of officers back down to 100,000. No sources were given for any of these estimates. Fast forward ten years and South (1988), now drawing explicitly upon the data from the Managerial, Administrative, Technical and Supervisor Association, projected that there were over 200,000 officers in the sector and that annual turnover had reached about £400 million. While, these estimates point to clear-cut growth, they also demonstrate troubling inexactitude when measuring the size of the industry.

Frustrated with these ambiguities, Jones and Newburn (1995) were the first to bring some precision to this exercise. Reflecting on the above estimates (as well as a few others), they observe how 'the first problem with measurement is that those doing the measuring rarely measure the same thing' (Jones and Newburn 1995, p. 223). They note how there is inconsistency when it comes to which functions are included (e.g. guarding, investigation, cash carrying), whether the numbers comprise labour (officers) and/or technology (e.g. alarms, cameras, locks and their operators) and on the distinction between contractual and in-house employment arrangements.[2] There is also, they continue, too often a conspicuous silence on the subject of sources, raising questions of reliability (Jones and Newburn 1995, pp. 223–224).

Against this backdrop, they sought to provide more a rigorous estimate along what they considered to be the three most important dimensions of size: number of officers, number of companies and turnover. It is important to highlight that we use this three-pronged approach to measurement throughout the remainder of the article. With regard to officers, they draw upon the Labour Force Survey (an annual survey covering 60,000 households across the UK), which indicated there were approximately 129,297 individuals working in the industry at the time (excluding security systems)—38,628 contract and 90,629 in-house (Jones and Newburn 1995, pp. 229). With reference to companies, they use the British Telecom Business Database, which suggested there were around 7,842 companies in the sector (including security systems) (Jones and Newburn 1995, p. 227). They could not find a reliable source for turnover. Despite these steps forward, however, they highlight numerous methodological limitations in their analysis (Jones and Newburn 1995, p. 230). As such, debate on the size of the industry seemed set to continue.

But continue it did not. Aside from a couple of pages devoted to the topic here and there (for example: George and Button 2000, pp. 29–30; Button 2002, pp. 97–99; Crawford et al 2005, pp. 13–15; Brodeur 2010, pp. 268–269), Jones and Newburn's study from 30 years ago remains the last systematic investigation into the size of the UK private security industry.[3] Why is this? Interestingly, Jones and Newburn (1995, p. 223) offer a clue when they remark that 'in the absence of public regulation or licensing… official estimates inevitably exclude important parts of the industry' (Jones and Newburn 1995, p. 223). They are suggesting, in other words, that the introduction of public regulation might help to resolve the haziness around the size of the industry by providing an official tally. They were

[2] Contractual employment arrangements are, where organisations contract out security functions to external providers, usually specialist private security companies. In-house employment arrangements are where organisations perform security functions internally.

[3] It is important to emphasise that we are omitting the discussion of size in Jones and Newburn (1998, pp. 67–91) because it covers much of the same ground as Jones and Newburn (1995).

right. The very year their study was published, the House of Commons Home Affairs Committee held an enquiry into criminality in the sector. By 1996 both Conservative and Labour had committed to regulation of the industry and in 2001 the Private Security Industry Act entered into the statute books. The centrepiece of this legislation is the establishment of SIA, a non-departmental public body accountable to the Home Office and tasked with licensing private security officers. In 2004, the SIA began rolling out its licensing regime and it has continued to function across the UK in more or less the same form ever since.

As foreseen by Jones and Newburn (1995), one of the implications of this statutory licensing system is that it seemingly ironed out uncertainties around the size of the UK private security industry. From now on, scholars could simply cite the latest number of officers licensed by the SIA when profiling the sector—and this is precisely what has happened. It has become the default approach for determining the size of the industry (see, for example: Button and Stiernstedt 2018; Kim et al 2018; White 2020a, b; Talas et al 2021). A particularly good illustration of this trend can be found in the two editions of what is probably the most influential textbook on the UK private security industry, Button's *Private Policing*. In the first edition, published in 2002 before the availability of SIA data, Button discusses a plethora of sources in relation to the size of the industry, covering similar ground to Jones and Newburn, albeit in less depth given that questions of measurement are not at the forefront of his analysis (Button 2002, pp. 97–99). In the second edition, published in 2020 after the availability of SIA data, he focuses primarily upon this single data source, though he does mention BSIA estimates of turnover too (Button 2020, p. 164).

Two features of this general trend are worth noting. The first is that while SIA data is openly accessible through the SIA website, many scholars access it indirectly through either the Confederation of European Security Services (CoESS) 'Facts and Figures' reports and dashboard (CoESS 2011, 2013, 2015) or a widely referenced *Guardian* article called 'Why the World is obsessed with private security' which itself draws upon the CoESS dashboard (Provost 2017). This gives the surface impression that SIA data are perhaps less commonplace than asserted here, yet closer inspection reveals the subtle dominance of this data. The second is that although references to the number of SIA licence holders are often accompanied by caveats about the imperfect coverage of the regime, these are usually left as passing comments rather than segues into a wider discussion about size (see for example Button 2020, p. 164).

It is important to underline that we are in no way critiquing the use of SIA data. They represent an extremely reliable and illuminating source when discussing the size of the UK private security industry and it would be remiss not to cite them. Our argument is rather that caveats about imperfect coverage should be taken as an invitation to explore other trustworthy sources which help to fill out the picture, particularly in relation to the number of companies and turnover in the sector. This is the task we set ourselves in the remainder of this article, which first introduces the SIA and ONS BRES datasets and then compares them during the period 2008–2021, in the process developing a more complex and contested profile of the industry.

Sources

The purpose of the SIA is to reduce criminality and raise standards throughout the UK private security industry. It does so by issuing licences to frontline private security officers across seven subsectors: cash and valuables in transit; close protection; door supervision; public space surveillance; security guarding; keyholding; and vehicle immobilization. It also issues non-frontline licenses to those individuals charged with managing frontline licence holders. To gain a licence, applicants must pass through a series of identity checks and role specific training programmes. While, the SIA has been publishing data on the number of licence holders since 2004, in more recent years it has added high-level demographic data such as licence holder age, gender, nationality and location, partly of its own initiative, partly in response to Freedom of Information requests (including our own). Taken together, these variables profile not only the size but also to some extent shape of the industry.

However, this licensing system and, by extension, the dataset it gives rise to has notable blind spots. For example: with the exception of door supervisors, it does not include private security officers working under in-house arrangements; it does not cover prominent subsectors such as security consultants, security managers or private investigators; it does not consider activity levels (e.g. full time, part-time or unemployed); it does not licence companies and therefore offers only limited insight into the corporate structure of the market (though it does run a voluntary company accreditation system call the Approved Contractor Scheme, which hosted 844 members in September 2021); and finally it does not measure the turnover of the industry. There are, in other words, many key indicators concerning the size and shape of the industry which are absent from these data. For this reason, it is important to explore other datasets to address these shortcomings, the most promising of which is the ONS BRES.

The ONS BRES collects annual company and employment data across the UK in September of each year. In 2021 (the most recent year covered in this article), the sample comprised approximately 85,000 companies. Within this sample, economic activity is categorised according to the Standard Industrial Classification (SIC) code. Categories relating to the private security industry lie within Division 80 ‘security and investigation activities’, which in turn belongs to Section N ‘administrative and support service activities’. Within this division, there are three subdivisions: private security activities (801); security systems service activities (802); and investigation activities (803). The specific activities included in these subdivisions are set out in Table 1. For present purposes, combined data from subdivisions 801 and 803 function as a useful comparator for the above SIA data because they relate to the same sector—‘labour-based’ private security—but include extra variables which address the above-outlined blind spots including: additional subsectors such as polygraph and fingerprinting services and private investigation (although this sits alongside the omission of keyholding and vehicle immobilization); private security officer activity

Table 1 Standard industrial classification of security and investigation activities

SIC subdivision	SIC description
Private security activities (801)	Guard and patrol services; picking up and delivering money, receipts or other valuable items with personnel and equipment to protect such properties, while in transit; armoured car services; bodyguard services; polygraph services, fingerprinting services; security guard services
Security systems service activities (802)	Monitoring or remote monitoring of electronic security alarm systems, such as burglar and fire alarms, including their maintenance, installing, repairing, rebuilding, and adjusting mechanical or electronic locking devices, safes and security vaults; selling such security systems, mechanical or electronic locking devices, safes and security vaults
Investigation activities (803)	Investigation and detective service activities; activities of all private investigators

SIC code definitions are from https://siccode.com/

levels; the number and size of companies; and the value of the industry.[4] Presenting and analysing the SIA and ONS BRES datasets alongside one another thus allows for a more complex and contested depiction of the basic size and shape of the private security industry, as the subsequent section illustrates.

Data

The three figures below present key tranches of SIA and ONS BRES data. Figure 1 depicts SIA and ONS BRES data relating to private security officer numbers and includes police officer numbers for purposes of comparison. Figure 2 represents ONS BRES data on company numbers and size. Figure 3 profiles ONS BRES data on company turnover (Fig. 3). All figures are our own elaborations and include a timeline relating to key political-economic events during the period covered. Together, these figures allow for a nuanced analysis of the size and to some extent shape of the UK private security industry.

Analysis

Looking first at overall trends from 2008 to 2011, the three figures combined provide an interesting picture. In 2008, there were: 242,985 licensed private security officers (according to SIA data in Fig. 1); 174,750 private security officers in active employment (according to ONS BRES data in Fig. 1); 6,140 companies (Fig. 2); and turnover stood at £6.32 billion (Fig. 3). In 2021, there were: 385,242 licensed

[4] As a side note, while the data in subdivision 802 are valuable in themselves, they primarily relate to the security technology sector and thus fall outside the scope of this article.

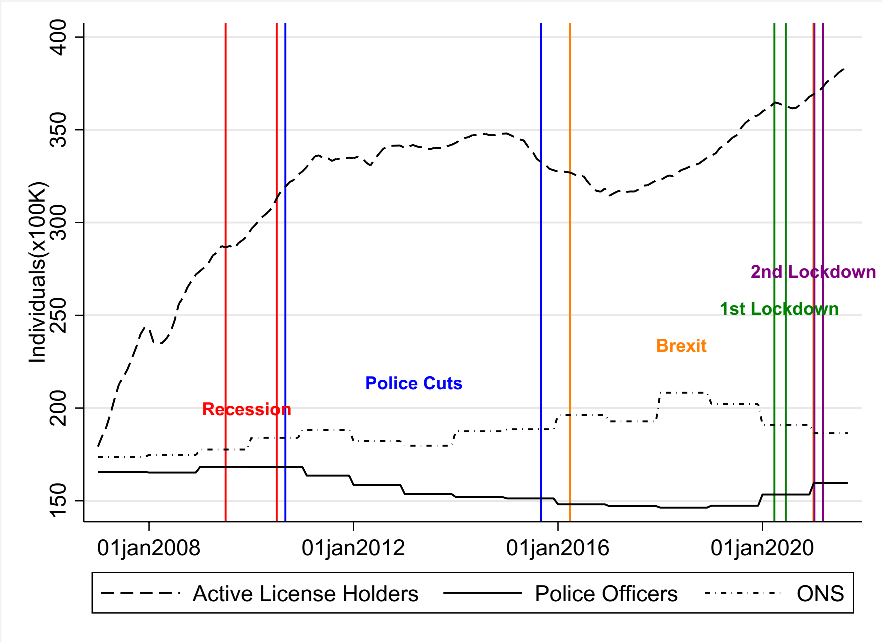

Fig. 1 UK private security officer numbers (SIA and ONS BRES) and police officer numbers, 2008–2021.

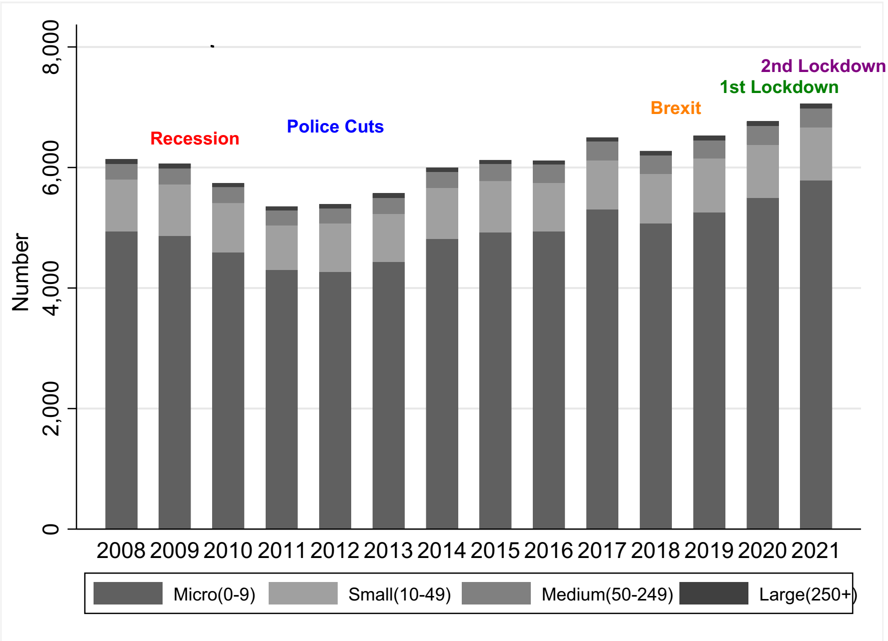

Fig. 2 UK private security company numbers and size (ONS BRES), 2008–2021

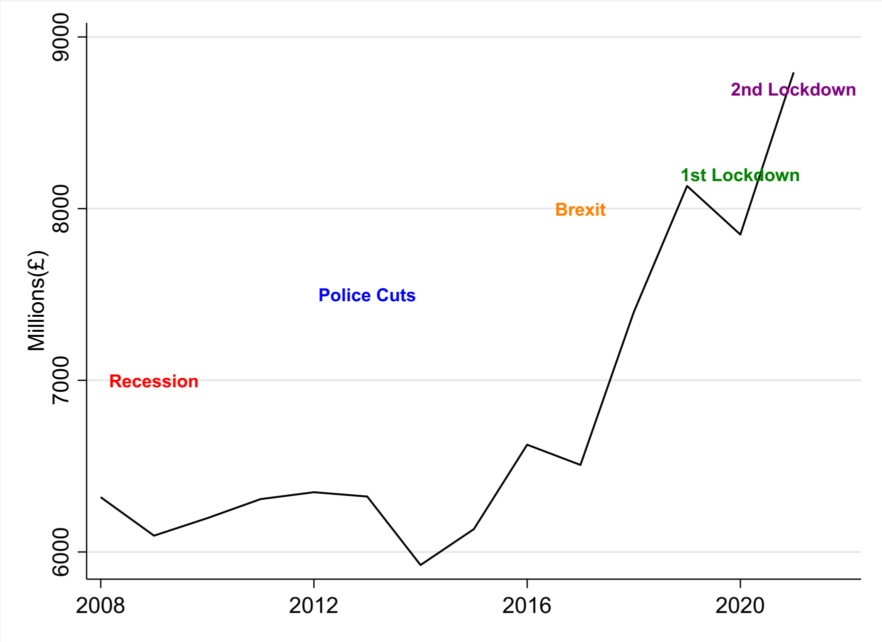

Fig. 3 UK private security company turnover in £ millions (ONS BRES), 2008–2021

private security officers (according to SIA data in Fig. 1); 186,421 private security officers in active employment (according to ONS BRES data in Fig. 1); 7,060 companies (Fig. 2); and turnover stood at £8.79 billion (Fig. 3). This gives rise to the following trends: the number of licensed private security officers increased by almost 60% with an (average) annual growth rate of 4.26% (according to SIA data in Fig. 1); the number of private security officers in employment increased 6.7% with an annual growth rate of just 0.51% (according to ONS BRES data in Fig. 1); the number of companies increased 15% with an annual growth rate of 1.6% (according to ONS BRES data in Fig. 2); and turnover increased by 39% with an annual growth rate of 3% (according to ONS BRES data in Fig. 3). Taken together, these trends point to an expanding sector—a sign of its increasingly prominent position in the twenty-first century UK policing landscape.

One trend which requires further consideration, however, is the discrepancy in SIA and ONS BRES private security officer numbers. There are two possible and overlapping reasons for this. First, slightly different subsectors are represented in the head counts (as mentioned earlier). However, this is unlikely to account for much of the difference as the subsectors in question are comparatively small. Second, some SIA licence holders are either inactive or only partially active in the sector and do not therefore show up in the ONS BRES data during its annual data sweep. Evidence supporting this hypothesis is the fact that of the private security officers in employment captured in the 2021 ONS BRES data, 78% worked full-time and 22% part-time. This also dovetails with portrayals of occupational culture in the sector, whereby many private security officers see their position as a temporary or transitional period of employment rather than a long-term career (Button 2020; Nalla and Wakefield 2022). It should not be assumed, in other words, that SIA licence holders work in the industry all the time, if indeed at all.

This discrepancy takes on more significance when private security officer numbers are compared with police office numbers—a metric frequently used to articulate the relationship between and relative standing of the public and private sectors in the plural policing landscape. In January 2008, combined police officer numbers in England, Wales, Scotland and Northern Ireland stood at 165,231 (Fig. 1).[5] Using SIA data, this gives a ratio of 1.47:1 private security officers to police officers. With ONS BRES data, however, the ratio is the much lower (and almost equal) 1.06:1 private security officers to police officers. Moving forward to September 2021 the gap between these ratios is much greater. At this time, there were 159,488 police offices in the United Kingdom (Fig. 1). Cross-referencing with SIA data, this indicates a ratio of 2.4:1 private security officers to police officers. But with ONS BRES data, the ratio is just 1.17:1 private security officers to police officers. This sheds interesting light on the long running debate around the extent to which the private sector is numerically overtaking the public sector in the delivery of policing functions (see: Jones and Newburn 2002; Brodeur 2010; White and Gill 2013; Churchill 2019; White 2020a, b). Through the lens of SIA data, the private security officer numbers are fast eclipsing police officer numbers. Whereas through the prism of ONS BRES data they are more or less equal in number.

Furthermore, when shorter and more specific periods of time are examined, other important trends are revealed. To begin with, in the post-financial crisis recession—the year of negative economic growth between 2009 and 2010—both datasets suggest the labour market experienced a period of above average growth: SIA licence holder numbers increased 11.34% and ONS BRES employment numbers increased at the lower rate of 3.58% (Fig. 1). At the same time, however, company numbers reduced slightly by −5.36% (Fig. 2) and turnover increased only marginally by 1.67%, returning to 2008 levels (Fig. 3). During this recession, then, it seems a substantial number of individuals headed for this labour market in search of (temporary or transitional) employment, even though overall performance in the sector remained unexceptional.

During the time of police budget cuts—September 2010-September 2015 when the centrally allocated police budget fell by 20%—both SIA and ONS datasets signal growth in the labour market: SIA licence holder numbers increased 0.84% annually, not far from ONS BRES employment numbers which increased by 0.49% (Fig. 1). During this period company numbers also increased by 1.36% (Fig. 2), while turnover reduced by −0.21% (Fig. 3). Using SIA data, the ratio of licence holders to police officers was 1.9:1 in 2010 and 2.2:1 in 2015, an increase of 16% for the whole period (Fig. 1). With ONS BRES data, the ratio of private security officers in employment to police officers was 1.09:1 in 2010 and 1.24:1 in 2015, a rise of

[5] Personal elaboration based on data from England and Wales (source: Home Office), Northern Ireland (source: Police Service of Northern Ireland) and Scotland (source: Police Scotland).

14% (Fig. 1). While, it might be assumed that this would be a profitable time for the sector, with companies and their employees seemingly moving into the space left behind by receding police officer numbers, the turnover data appears to suggest otherwise.

With regard to the period of European Union withdrawal—between the referendum result in June 2016 and the UK's departure from the European Union in December 2020—the datasets disclose a contrasting set of trends. Both sets of labour market statistics held relatively steady, with SIA licence holder numbers increasing by 2.88% annually and ONS BRES employment numbers reducing by −0.67% per year (Fig. 1). Yet, curiously, within these trends licence numbers decreased and then increased and employment numbers increased and then decreased (Fig. 1). At the same time, company numbers increased by 2.66% (Fig. 2) and turnover increased by 4.6% (Fig. 3). Using SIA data, the ratio of licence holders to police officers was 2.2:1 in June 2016 and 2.4:1 in December 2020, an increase of 2.23% (Fig. 1). With ONS BRES data, the ratio of private security officers in employment to police officers was 1.33:1 in 2016 and 1.25:1 in 2020, a decrease of 1.5% (Fig. 1). As such, while this was clearly a profitable period for the sector, this is not particularly evident in labour market and company trends.

When it comes to the period covering the major Covid-19 lockdowns—between the start of national lockdown one in March 2020 and the end of national lockdown two in March 2021—the datasets again unveil complexity. While, SIA licence numbers increased by 2.1%, ONS BRES employment numbers decreased by −2.4% (Fig. 1). Less ambiguously, however, this period witnessed a sharp rise in both company numbers by 4.28% (Fig. 2) and turnover by 12.04% (Fig. 3), ultimately indicating that this was a highly profitable period for the sector. This finding aligns with the 'critical worker' status conferred upon private security officers during the pandemic, which allowed them to work in a plethora of roles deemed 'essential' to the national interest in a time of crisis.

Conclusion

The preceding analysis illustrates that, while SIA data constitute an important source of information when measuring the size of the private security industry, they should not be the only point of reference. This is because they offer only a partial count of labour market numbers and suffer from blind spots when it comes to company numbers and turnover in the sector. To address these shortcomings, we should bring other reliable data into the equation, for example the ONS BRES. It is not that such data resolve these blind spots, but they do allow for a more comprehensive (and complex) picture of the UK private security industry. This is important when it comes to making observations about the size and shape of the industry, for instance relating to growth rates and the ratio of private security officers to police officers. Observations in this vein often serve as key starting points in analyses of the industry, so adding nuance to them by embracing more than one data source has far reaching implications for scholarship in the field.

Furthermore, the need to seek out and compare different datasets is not specific to the UK case. It holds for other countries too. While, there is not space here to excavate the use of sources in national-level measurements of private security elsewhere in the world, we can offer an insight into this issue by returning to one of the popular dataset compilations mentioned earlier—the CoESS 'Facts and Figures' reports and dashboard (CoESS 2011, 2013, and 2015). In this compilation, national licensing statistics are used to represent the number of private security officers in each of the 34 countries in the dataset (not just the UK). As such, when scholars use this compilation to profile the number of officers in any given national industry (as they often do), they inevitably reproduce the shortcomings of this dataset (see for example: Dolek and Rigakos 2020; Saarikkamaki and Lampela 2022; Leloup and White 2023). Of course, the shortcomings vary country-to-country depending on the coverage of the national licensing system in question (different systems cover different sectors). But the underlying point remains the same—over-reliance on single datasets, for instance generated through licensing systems, leads to partial depictions of national private security industries. While, we have attempted to remedy this issue in the UK case, more work needs to be done elsewhere to address this widespread dependence.

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