

Freedonia Industry Study #1518

## *Private Security Services*

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*Private Security Services*, a new study from The Freedonia Group, provides you with an in-depth analysis of major trends in the industry and the outlook for product segments and major markets -- critical information to help you with strategic planning.

This brochure gives you an indication of the scope, depth and value of Freedonia's new study, *Private Security Services*. Ordering information is included on the back page of the brochure.

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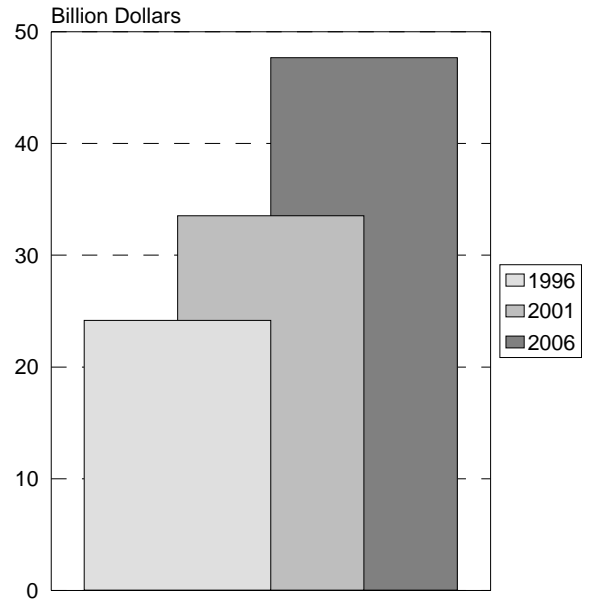
# Study Highlights

• Excluded are in-house, proprietary security services, such as guards, detectives and off-duty police officers on the paid staff of (non-security) business establishments. Also excluded are equipment installation services (aside from systems integration), locksmith activities, and security products distribution and sales.

- Demand for private contracted security services is forecast to advance 7.3 percent per year to \$48 billion in 2006.
- The guarding services segment accounted for the largest share of security services expenditures in 2001, with 35 percent of the total. Growth in guarding services demand will benefit from the increasing interest in better trained and more experienced guards which accompanies the shift away from viewing guarding as a commodity.
- The nonresidential market will continue to account for the vast majority of private security services demand, led by above average gains in the government sector and increased growth in demand at commercial and industrial facilities.
- In 2001, the Pacific subregion of the US, which features several large urban centers, was the largest geographic market for private security services. The Middle Atlantic and Pacific subregions will post the strongest gains through 2006, benefitting from the presence of a number of the nation's largest urban areas.
- In 2001, the five largest firms -- Securitas (via Pinkerton's), Tyco International (via ADT), Wackenhut, Corrections Corporation of America and Pittston (via Brink's and Brink's Home Security) -- accounted for 25 percent of industry revenues in the United States.

# Study Highlights

## Private Security Services Demand, 1996-2006



### Private Security Services Demand

(million dollars)

Item	1996	2001	2006	2011	% Annual Growth	
					01/96	06/01
Gross Domestic Product (bil \$)	7813	10210				5.4
\$ security/000\$ GDP	3.1					
Security Service Revenues	24180					
Guarding	10000					
Alarm Monitoring	6900					
Private Investigations	1990	21				
Armored Transport	1490	2060				5.3
Private Correctional Facilities Mgt	660	19				
Systems Integration	715					
Security Consulting	525					
Pre-Employment Screening & Other	1900					
000\$ revs/employee	33.4	3				
Security Service Employment (000)	723	882				5.9

### SUMMARY TABLE

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# Market Environment

The Market Environment Section discusses factors influencing private security services demand, including crime rates and demographic trends.

This information provides you with an understanding and an analysis of the climate in which the private security services industry operates.

## MARKET ENVIRONMENT

### Technological Environment

Private security has become increasingly technology-driven over the past two decades or so. Advances in microelectronics, computer hardware and software have not only the type of security products available to security services but also the competitive environment within the private security services industry. For instance, some types of security services can be provided in a more efficient manner through the use of more sophisticated electronics. However, other sectors of the security services market, particularly the more labor intensive services, are now in competition with high tech security electronics which can provide similar protection with little human intervention.

Advances in both discrete technologies (motion detection, wireless signal transmission, card reading and storage, video surveillance, etc.) and generic electronic technologies (e.g., computer and microprocessor control, analog-to-digital conversion, networking and applications software development) have driven demand for services such as systems integration. These vendors are often called in to update existing security systems with the new technologies or to create whole systems in which components such as access control, closed circuit television (CCTV), environmental control, fire detection and suppression, conventional intrusion detection and other building management units are fully integrated. Security consultants -- who are often employed to recommend the use of specific security equipment and systems -- have also benefitted from the growing complexity of security technology, which has made their expertise more valuable.

Central station alarm monitoring is another one of the more technology-intensive areas of security services. Monitoring firms must continue to update not only

# Security Services

The Security Services Section provides demand for historical years and forecasts growth to 2006 and 2011.

This information helps you:

- Analyze your company's growth potential in the industry.
- Outline your strategic plans for five and ten years out.
- Establish sales goals.

## SECURITY SERVICES

### Personal Emergency Response

The market for monitoring of dedicated persons (PERS) alarms is forecast to expand 6.7 percent to \$180 million. Demand will be driven by the increasing 65-year-old cohort, a key market for PERS alarms. There is a trend toward people recuperating from illnesses and injuries in their homes rather than in an institutional setting. Growth will also be influenced, to a lesser extent, by interest in these panic button-type alarms among other groups, including single women and latch-key kids.

A variety of factors contribute to a greater number of sick and/or disabled individuals remaining in their homes and outside of an institutional setting. First, there is a cost-cutting trend by insurance groups toward shorter reimbursed hospital stays, shifting care to include more outpatient and home health care services. Second, many older people prefer to remain at home, either independently or with family, compared to receiving care in a nursing facility. In these scenarios, people who frail or in a vulnerable physical condition are increasingly spending time alone instead of being monitored by a full-time nursing staff, and PERS systems enable monitoring from a remote location. The growth of the PERS alarm monitoring industry is further benefitted by the fact that insurance providers and Medicare increasingly cover at least the temporary use of PERS services, based on the understanding that the costs of hospitalization or care in a nursing facility are

### Armored Transport Services Market

(million dollars)

Item	1992	1996	2001	2006	2011
Financial Service Income (bil \$)	153				
\$ security/000\$ income	5.9				
Armored Transport Service Revenues	900				
Traditional Armored Transport	735				
ATM Servicing & Other	165				
000\$ revs/employee	42.9				
Armored Transport Employees (000)	21				

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# Markets

The Market Sections analyze trends and consider the threats and opportunities in each of the major end-use and regional markets for private security services.

The information presented will help you:

- Focus your sales and marketing efforts on high growth areas.
- Propose new areas for development.

## END-USE MARKETS

### Government

The government security services includes those provided at facilities such as courthouses, court houses, prisons, embassies and other government buildings. The security services in this market is projected to increase by \$1.5 billion per year to \$5.5 billion in 2006. Gains will be driven by an ongoing trend toward privatization of certain government services which began in earnest in the 1990s. Further advances will be restrained by concern over additional privatization in the correctional facilities management sector.

In addition to serving as a market for private security services, the government is also competition for contract security providers. In addition to the more obvious competition from local law enforcement officers, private security services vendors also compete with other types of federal security employees. For instance, in November 2001, the US Congress passed a law through which airport security became a duty of the federal government. Beginning in February 2002, all the

### South Security Services Market by Subregion

(million dollars)

Item	1992	1996	2001	2006	2011
South Population (mil persons)	88.6	94.4			
South GDP (bil \$)	2033	2567			
\$ security/capita	59.8	82.0			
\$ security/000\$ GDP	2.6	3.0			
Southern Security Services Revenues*	5295	7810			
South Atlantic	2990	4420			
East South Central	640	890			
West South Central	1665	2495			

\* excluding corrections

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# Industry Structure

Gain a better understanding of your competition and analyze your company's position in the industry with information about:

- industry composition
- market share
- competitive strategies
- marketing
  - residential
  - nonresidential
- mergers & acquisitions
- cooperative agreements

## INDUSTRY STRUCTURE

### Marketing - Residential

In the residential market, aggressive marketing is important given the natural responsiveness of the consumer sector to promotional advertising. Additionally, marketing efforts are used to educate the consumer about security threats and available residential security options. As the industry has become more competitive, firms like Protection One have moved toward more aggressive marketing, marketing and/or public relations opportunities. In fact, the industry's advertising and marketing costs have increased since 1992. Most consumers are targeted through direct mail, television advertisements, in-store brochures, and web sites geared toward the residential consumer.

Word of mouth remains an important source of new customers, as people want to be sure the systems are easy to use and well monitored and the company is reliable. In this respect, the development of a brand name is particularly important. It is partly through its well-known brand name that ADT has managed to garner such a large share of residential alarm monitoring clients. Similarly, Brink's Home Security is able to benefit from the use of the Brink's name, which has a long and well-established history for providing armored vehicle security.

Home security products and services are also being promoted through partnerships with various nonsecurity-related service providers. These can include consumer electronics firms, home builders, realtors, and utilities and telecommunications providers, among others. For instance, in March 2001, Protection One entered into a marketing agreement with BellSouth, through which BellSouth offers Protection One's security systems and services to its customers under the name BellSouth Security Systems from Protection One.

ADT co-marketed its residential services in a slightly different way. In 2000, the company began offering discounts to employees of the commercial clients it

# Company Profiles

The Profiles Section analyzes 44 companies active in the U.S. private security services market. These profiles represent a sampling or cross-section of the types of companies involved in the industry.

Divisions, subsidiaries, joint ventures, etc., are discussed under appropriate parent companies.

Sources for profiles included:

- Information provided by key staff members in the respective companies
- Annual reports
- 10-K reports
- Security analysts reports
- Corporate product literature

## COMPANY PROFILES

### **Pittston Company**

1801 Bayberry Court  
Richmond, VA 23226  
804-289-9600  
<http://www.pittston.com>

Brink's Incorporated  
One Thorndal Circle  
Darien, CT 06820  
203-662-7800  
<http://www.brinksinc.com>

Brink's Home Security Incorporated  
8880 Esters Boulevard  
Irving, TX 75063  
972-871-3500  
<http://www.brinkshomesecurity.com>

Sales:  
Emplo

**SAMPLE PAGE**

Key Products/Services: armored car, automated teller machine, air courier, coin wrapping, currency and deposit processing services; and electronic security systems

Pittston is involved in the security, timber, gas, and transportation and freight industries. The Company operates through four segments: Brink's Incorporated, Brink's Home Security Incorporated (BHS), BAX Global Incorporated and Other Operations. In December 1999, Pittston announced the discontinuation of its coal business, which was part of Pittston Minerals Group. The coal business is being accounted for as a discontinued segment, called Pittston Coal Operations, until all

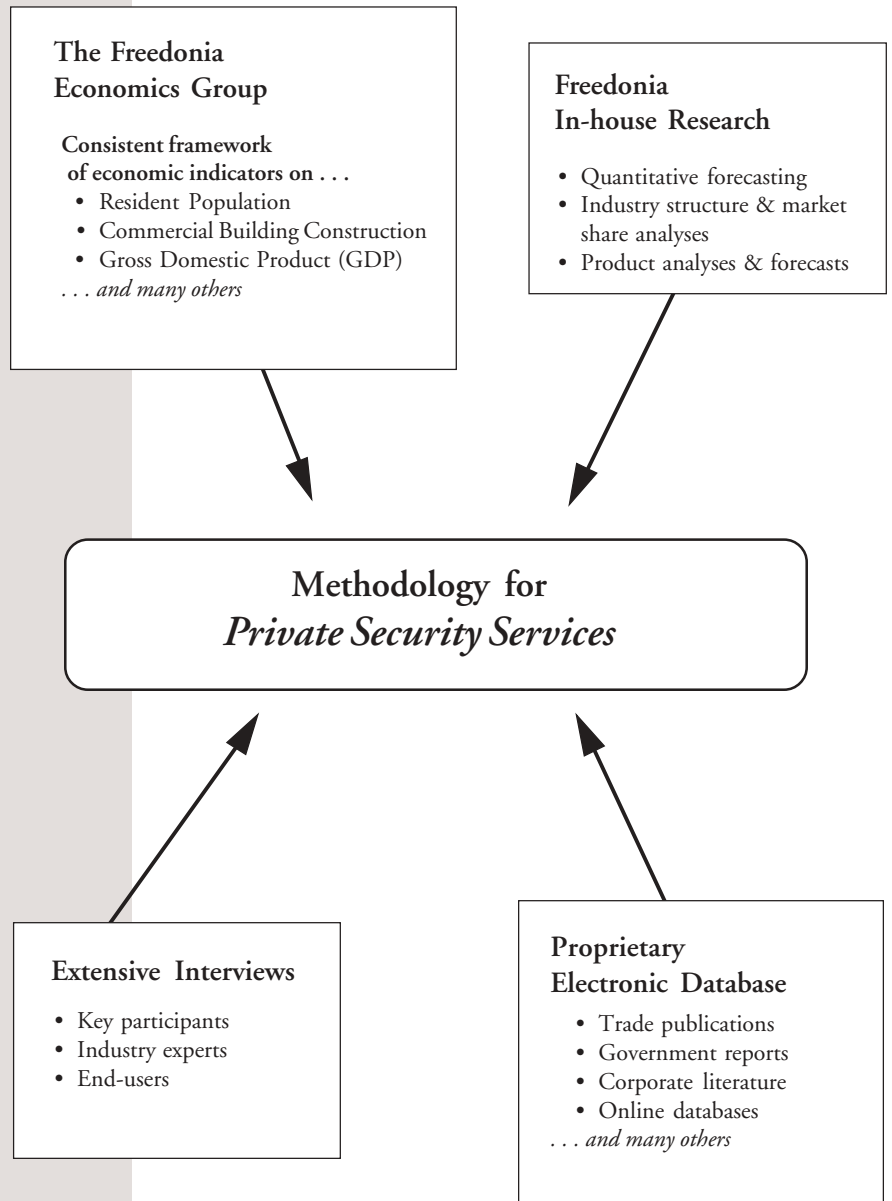
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# Companies Profiled

ABM Industries Incorporated  
American Commercial Security Services  
Sundown Security Incorporated  
AFA Protective Systems Incorporated  
Allied Security  
SpectaGuard Incorporated  
Armor Holdings Incorporated  
International Training Incorporated  
O’Gara-Hess & Eisenhardt  
AT Systems Incorporated  
Ameriflight Incorporated  
Armored Transport Incorporated  
Autovend Incorporated  
CSG Security Services Incorporated  
Delaware Depository Service Company  
UCI DistributionPLUS  
Barton Protective Services Incorporated  
Brambles Group  
InstaShred  
Recall Corporation  
ChoicePoint Incorporated  
ABI Consulting Incorporated  
BTi Employee Screening Services Incorporated  
DBT Online Incorporated  
Drug Free Consortium  
Fraud Defense Network  
Practical Computer Concepts Incorporated  
RRS Police Records Management  
Chubb plc  
A-Link USA  
Alarm Processing Corporation  
Cornell Companies Incorporated  
Correctional Services Corporation  
Youth Services International  
Corrections Corporation of America  
TransCor America LLC  
Day & Zimmermann Incorporated  
Dunbar Companies  
Star Armored Incorporated  
Dussmann Group  
Pedus Service USA  
Edison International  
Examination Management Services Incorporated  
PMSI Services Incorporated  
FirstService Corporation  
BLW Incorporated  
Intercon Security Limited  
Security Services and Technologies  
Group 4 Falck A/S  
Guardsmark Incorporated  
Honeywell International Incorporated  
ADEMCO Group  
Inter-Con Security Systems Incorporated  
International Total Services Incorporated  
Johnson Controls Incorporated  
Kessler International  
Kroll Incorporated  
Lifeline Systems Incorporated  
SOS Industries Incorporated  
Management & Training Corporation  
Outsource Partners Incorporated  
Advance Security  
Health Care Security USA  
Kelly (DB) Associates  
Premier Residential Security USA  
US Security Associates Incorporated  
Pay-O-Matic Corporation  
Rapid Armored Corporation  
Pittston Company  
Brink’s Incorporated  
Protection One Incorporated  
Rentokil Initial plc  
Initial Security Services  
SBC Communications Incorporated  
Secom Company Limited  
Westec InterActive Incorporated  
Securicor plc  
Argenbright Security Incorporated  
Electronic Monitoring Systems Incorporated  
Securitas AB  
APG Security Incorporated  
Burns International Services Corporation  
Doyle Protective Service Incorporated  
Globe Aviation Services Corporation  
Loomis, Fargo & Company  
Pinkerton’s Incorporated  
Smith Security Incorporated  
Siemens AG  
Cerberus  
Security Technologies Group  
Temco Service Industries Incorporated  
Spartan Security Services Incorporated  
TransNational Security Group LLC  
Cauley Detective Agency Incorporated  
Continental Secret Service Bureau Incorporated  
International Management Assistance Corporation  
Professional Security Bureau Limited  
Security Forces Incorporated  
SFI Electronics  
Tyco International Limited  
ADT Security Services Incorporated  
Edison Security Corporation  
Edison Select  
Grinnell Fire Protection Systems  
SecurityLink  
Sensormatic Electronics Corporation  
Simplex Time Recorder Company  
SimplexGrinnell LP  
Smith Alarm Services  
Sonitrol Corporation  
Valley Burglar & Fire Alarm Company  
Westec Business Security Incorporated  
US Investigations Services Incorporated  
United Labs  
USIS Professional Services  
Vance International Incorporated  
Wackenhut Corporation

# Forecasting Methodology

Freedonia does not just collect and reprint data; Freedonia develops data. Our analysts thoroughly investigate an industry by extensively interviewing key industry participants and analyzing information from sources such as associations, government and trade literature. Once this research is complete, Freedonia establishes one set of forecasts. All writing, editing and forecasting is done in-house to assure quality and consistency. In cases where data does not exist, Freedonia develops the data based on input/output ratios, bills of materials and flow charts. The following chart summarizes Freedonia's methodology:



# About The Freedonia Group

## Advantages of Freedonia Reports

The Freedonia Group, Inc. is a leading international industry study/database company.

Since 1985, Freedonia has published 1,800 titles covering areas such as chemicals, coatings and adhesives, building materials, plastics, industrial components and equipment, health care, packaging, household goods, security, and many other industries.

Freedonia has produced a wide variety of titles, including:

- *Electronic Security*
- *Smart Cards*
- *Commercial & Industrial Security*
- *Biometric & Electronic Access Control Systems*

Because Freedonia is a reliable information source, our forecasts are cited in numerous publications such as *The Wall Street Journal*, *Security Management*, *Security Letter* and *Security*.

### **In-house operations**

Because all of our staff work at the same location, interaction between analysts and departments provides a strong system of checks and balances.

### **Consistency**

Our Economics Group develops indicators that are used by all analysts. Therefore, every Freedonia study is based on a consistent set of economic assumptions (GDP, resident population, commercial building construction, etc.)

### **Reliable forecasts**

Because all of our forecasts consider the environment in which a product or industry is operating, as well as threats and opportunities to the market, Freedonia forecasts are reliable indicators of future performance.

### **One-on-one interviews**

All studies are produced by conducting interviews with key industry participants and end-users.

### **Proprietary electronic database**

Freedonia's analysts can tap into an extensive in-house electronic database containing corporate literature (including private company information), trade publications, government reports and many other sources of information.

# *About Our Customers*

Freedonia's clients include major US and international companies in the manufacturing, services, consulting and financial sectors.

Typical purchasers of Freedonia studies :

- **Key Executives**
- **Corporate Planners**
- **Market Researchers**
- **Financial Analysts**
- **Information Centers**
- **New Product Developers**
- **Merger & Acquisition Specialists**

Since 1985 we have provided research to customers ranging in size from global conglomerates to one person consulting firms. More than 90% of the industrial companies in the Fortune 500 use Freedonia research to help with their strategic planning.

Some of Freedonia's customers in the private security services market include: Chubb, Honeywell, Pittston, Securitas, Tyco International and Wackenhut.

# Other Titles From Freedonia

For more information about these or other Freedonia titles, please contact us at:

The Freedonia Group, Inc.

Phone: (440) 684-9600

(800) 927-5900

Fax: (440) 646-0484

## *Electronic Security*

The \$7 billion US market for electronics-based security products and systems is analyzed in this study. It presents historical demand data (1992, 1996, 2001) and forecasts to 2006 and 2011 for shipments and sales of alarm systems, access controls and biometrics, electronic article surveillance, CCTV, bomb and metal detection devices, and emerging aviation security devices. The study also details industry structure and market share, and profiles key suppliers.

#1541. . . . . 5/02. . . . . \$3,900

## *World Aviation Security*

Global demand for private aviation security will grow 11.2% yearly through 2005 based on heightened security awareness in the wake of terrorist attacks. Product demand will rise over 25% annually driven by explosives detectors, biometric access controls/IDs, digital CCTV, and reinforced cockpit doors and cargo holds. This study analyzes the US\$2.6 billion world aviation security industry to 2005 and 2010 by service, product, region and for 14 countries. It also evaluates market share and profiles key vendors.

#1536. . . . . 4/02. . . . . \$4,600

## *Biometric & Electronic Access Control Systems*

The US market for electronic access controls will grow 12.8% annually through 2005. Fingerprint scanners, smart cards and high-end contraband detectors such as explosive detection systems (EDS) will lead gains. Demand will be strong in most applications including airports and computers, as well as commercial, industrial and residential settings. This study analyzes the \$3.3 billion US electronic access control industry to 2005 and 2010 by product and market. It also details market share and profiles key firms.

#1503. . . . . 11/01. . . . . \$3,700

## *Janitorial Services & Supplies*

US demand for janitorial services and supplies will grow 5.6% annually through 2005. The supplies sector will offer the best growth, driven by demand for commercial cleaning equipment. Growth in services will be driven by the continued outsourcing of noncore operations by corporate, institutional and government entities. This study analyzes the \$28 billion US janitorial services and supplies industry to 2005 and 2010 by product, market and region. It also presents market share data and profiles leading companies.

#1477. . . . . 10/01. . . . . \$3,500

## *World Security Products & Systems*

Global demand for security products and systems will grow 8.7% annually, driven by an increasing crime problem in developing nations and media attention to crime in developed countries. Higher end CCTV cameras, anti-shoplifting (EAS) tags, access controls and explosives detectors will lead gains. This study analyzes the US\$39 billion global security products and systems industry to 2004 and 2009 by type, end-use, region and for 29 countries. It also details market share and profiles key companies.

#1373. . . . . 1/01. . . . . \$4,300

## *World Security Services*

Private contractual security services demand will grow over 8% annually worldwide. Contract guarding will remain the largest segment while less mature markets such as central alarm monitoring, investigations, training, systems integration and consulting grow faster. This study examines the US \$66 billion global security services industry to 2004 and 2009 by type, market, region and for 30 countries. It also evaluates market share and profiles key companies.

#1348. . . . . 12/00. . . . . \$4,300

