



UK Security Industry Analysis

Summary Only

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UK Security Industry Analysis

A summary of the report will be available to attendees of ISE and ICE after the show closes.

Research and analysis for Westlands Advisory's UK Security Industry Analysis was completed in September 2021. The data and insight provided is from ongoing interaction with industry and government, participation in industry associations and NGO think tanks, and from a network of end-users, influencers, integrators, technologists and academics across the UK.

The report provides an analysis of the major trends and dynamics that are impacting stakeholders across the industry, including security suppliers and the buying community. It includes assessment across cyber security, public safety, government (borders and intelligence services) and critical infrastructure and outlines the current position of the market, and how it might evolve over the next 5 years. The following provides an overview of the report. A summary will be available to all attendees of International Security Expo and International Cyber Expo after the show. The full report will be available to the security end user and buyer community.

The aim of the work is to provide governments, industry and end-users with a broad view of the various trends and how they interrelate with each other. We envisage that the report can be used to generate ideas, plan future strategies or test current assumptions.

WA would also like to thank Nineteen Group for supporting the work.



Anthony Leather
Co-Founder & Director

Anthony has over 10 years of security industry experience which includes both strategic and operational roles. Before founding Westlands Advisory, Anthony worked in political risk advisory prior to leading a team of security analysts at a consultancy firm where he delivered a range of complex projects to both industry and government. Anthony is adept at delivering highly valuable insights to support strategic decisions, blending his wide industry expertise with his operational experience. He is a highly sought industry speaker, delivering presentations at numerous global conferences and appeared in the media across a range of security issues.



Steven Webb
Co-Founder & Director

Steven has worked in market and strategy consulting for over 20 years as both a consultant, business leader and non-executive director. He has worked with security organisations for over 10 years, leading project delivery, facilitating workshops and guiding business leaders. Work includes business case development and validation, strategic planning, market entry support and competitive benchmarking. Steven also has considerable knowledge of downstream security markets including aerospace and critical infrastructure and has worked with government and leading system integrators.

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A 10 page summary of the report will be available to attendees of ISE and ICE after the show closes

Executive Summary

Industry Analysis

- Overview
- Buyer Dynamics
- Risk & threats
- Business
- Technology
- Financial Market
- Government, Economics & Policy

Industry Forces Analysis

Technology Insight

- Access Control
- Video Surveillance
- Communications
- Data & Analytics
- Cyber Security
- Communications & Information Management

Vertical Market Analysis

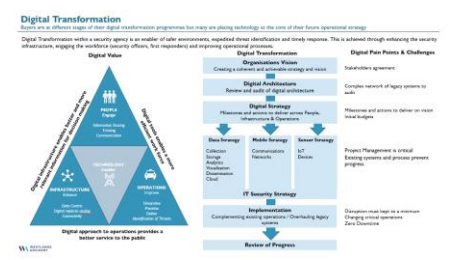
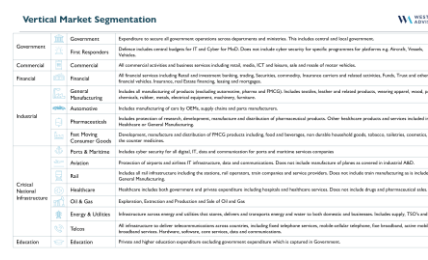
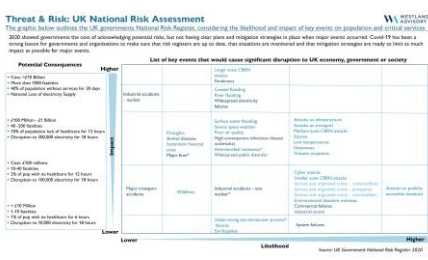
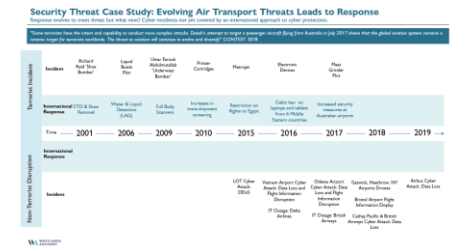
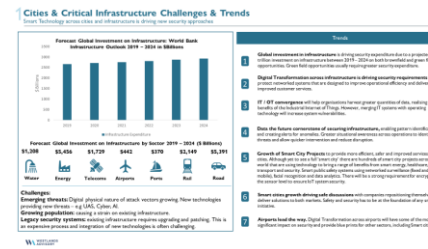
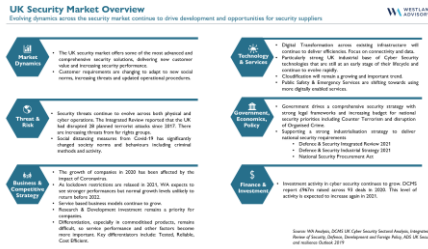
- Government & Emergency Services
- Critical National Infrastructure
- Education
- Financial
- Commercial
- Industrial

Appendix

The report provides an analysis of the major trends and dynamics across the UK security industry addressing both the Cyber and Physical security market. Whilst providing an analysis on core security technologies, it also considers the convergence between them with a focus on resilient security processes and systems across both the digital and physical footprint. The report provides analysis on the following areas:

- Buyer Dynamics - Industry Expenditure and Forecast
- Risk & threats- Threat assessment
- Business - Competitive Analysis
- Technology - Existing technology and future requirements
- Financial Market - Investment and M&A assessment
- Government, Economics & Policy - Impact of policy and national security strategy

Example Slides



UK Industry Analysis Framework

Westlands Advisory utilises the following framework to analyse the UK security market dynamics and the impact on customer expenditure.

The UK has one of the largest security industrial bases that offers some of the most advanced security solutions available on the global market

- Financial performance, offerings of the largest 1000 UK security companies
- Assessment of future strategy
- R&D focus and investment

Major events are driving new dynamics that are changing buyer behaviours. Brexit and Coronavirus have impacted expenditure and requirements across the security market

- Security expenditure analysis
- Forecasts by vertical markets
- Changing customer buying requirements

UK risk profile continues to evolve with increasing digitalisation, growing cyber incidents, sustained terror threats and criminal activity.

- Emerging threat assessment
- Assessment of risk appetite



Rapid digitalisation across industries is driving demand for more connected security systems. Growing convergence of cyber and physical systems

- Market size forecasts by technology 2019 -2026
- Assessment of emerging and disruptive security technology and services
- Changing business models

Increased investment in cyber security and M&A activity across the market

- Cyber security investment trends
- Security company financial performance.

UK government policy continues to prioritise national security, supporting a strong industrialisation strategy to deliver national security requirements

- Defence & Security Integrated Review 2021
- Defence & Security Industrial Strategy 2021
- National Security Procurement Act
- Economic forecast

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