Survey on the private security and surveillance sector in Italy

Private security and surveillance: the attractiveness of the sector

Project number: 101145583

Research report

Rome, November 24th 2025 (2024-133ces **R07**)

AGENDA

Introduction | Presentation of the survey

This paper presents the results of a study, funded by the EU for the support for Social Dialogue in the context of the Social Partner project "INTEL: NextGeneration". The study was conducted by Format Research in collaboration with the project leaders, the Confederation Of European Security Services (CoESS) and UNI Europa, with the support of ConFedersicurezza. The aim of the study was to help **the private security and surveillance sector understand how to increase its attractiveness** to a young and diverse workforce. The study focused on analyzing young people's perceptions and career expectations in terms of training, working conditions, and job types.

The survey involved two distinct groups of interviewees:

➢ **young workers** (aged <35) already employed in the private security services sector;
➢ **"potential workers,"** that is, young people under 35 who have obtained or are obtaining a qualification in training courses potentially consistent with a career in private security.

The main themes analyzed in the two groups concerned: **values in the workplace**, **perceptions of the sector**, **methods of accessing the profession**, as well as the evaluation of private security as an attractive working environment in terms of **career opportunities and the quality of training programs**. The results are presented separately for each target group.

105 interviews were conducted with **young workers already employed** in the sector and **305 interviews with "potential workers".**

The interviews were conducted using the mixed CATI-CAWI system between March and June 2025.

Values and motivations in the workplace.

For both groups, economic aspects and job stability are key factors. Among current workers, salary and benefits (79%) and work-life balance (78,1%) are the main priorities, as they are for potential workers, who cite job security (54,1%) and work-life balance (52,1%) as decisive elements. Inflation and the cost of living emerge as widespread concerns.

Entering the Private Security Sector and expectations.

Over half of current workers (58,1%) come from families with experience in the field and learned about the sector through personal contacts. Their main expectations concern economic and professional stability; however, around 40% report dissatisfaction due to inadequate pay and limited career opportunities. Among potential workers, financial motivations and interest in the world of security are also decisive factors.

Perception of the private security sector and working conditions.

The role of private security in supporting public safety is positively recognized by 60% of workers and 56,1% of potential workers. However, nearly half of current employees express a negative view of working conditions, highlighting the need for fairer pay, greater flexibility, and professional recognition. Potential workers, on the other hand, show a more optimistic perception (53,4% positive).

Perception of professional development and career prospects.

Only one in three workers evaluates growth opportunities positively, while 55% of potential workers believe career prospects in the sector are good. Interest in leadership roles is high in both groups: over half of current workers and more than 80% of potential workers aspire to managerial positions, particularly in personnel management or technological and IT security.

Perception of training and skills.

More than half of workers (58,1%) and potential workers (55%) consider the training received to be adequate. The priority areas identified include knowledge of security regulations, criminal law, and digital skills. There is strong demand for updated training content (cybersecurity, AI) and for wider use of digital learning methods, which are especially appreciated by university graduates.

Social Dialogue.

Union awareness is high among current workers (86,7%) and somewhat lower, though still significant, among potential workers (65%). This indicates a sector perceived as structured and organized, yet with room for improvement in how it communicates its public role.

AGENDA

PRESENTATION OF THE SURVEY

MAP OF THE PRIVATE SECURITY SECTOR IN ITALY

GLOSSARY

WORKERS

- General summary considerations
- Values and motivations in the workplace
- Entering the private security sector and expectations
- Perception of the private security sector and working conditions
- Perception of professional development and career prospects
- Perception of training and skills
- Social dialogue
- Sample characteristics

POTENTIAL WORKERS

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METHOD

Universe of private security companies | There are 1,677 companies operating in Italy that provide security services, 430 of which are security companies that, according to Italian law, must be certified by the Ministry of the Interior.

1,677

Companies operating in the security service sector in ITALY

(they were 1505 in 2024)

...of which

430

List of private security companies certified pursuant to Ministerial Decree 115/2014 by the Ministry of the Interior

(they were 423 in 2024)

Private Security Firm Employees | In Italy, nearly 100,000 people work in 1,677 private security firms, 430 of which are certified .

1,677
Companies operating in the security service sector in ITALY
(they were 1505 in 2024)

...of which

430
List of private security companies certified pursuant to Ministerial Decree 115/2014 by the Ministry of the Interior
(they were 423 in 2024)

THE EMPLOYED

99.933
Employed in the security service sector in ITALY

...of which

94,279
Employed in the security service sector
(Ateco code for private security 80.10 and 80.20)

...of which

5,654
«Others employed» in the security service sector
Companies recognized by the Ministry but with a different ATECO code than that of private security 80.10 and 80.20

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Universe of private security company employees | Distribution of company employees by macro-area and region.

99.933

Employed in the security service sector in ITALY

...of which

...of which

94,279

Employed in the security service sector

(Ateco code for private security 80.10 and 80.20)

5,654

«Others employed» in the security service sector

Companies recognized by the Ministry but with a different ATECO code than that of private security 80.10 and 80.20

	Total employed	% of the total Italy
Northwest	**30.266**	**30.3%**
Northeast	**18.688**	**18.7%**
Center	**24.579**	**24.6%**
South and islands	**26.400**	**26.4%**

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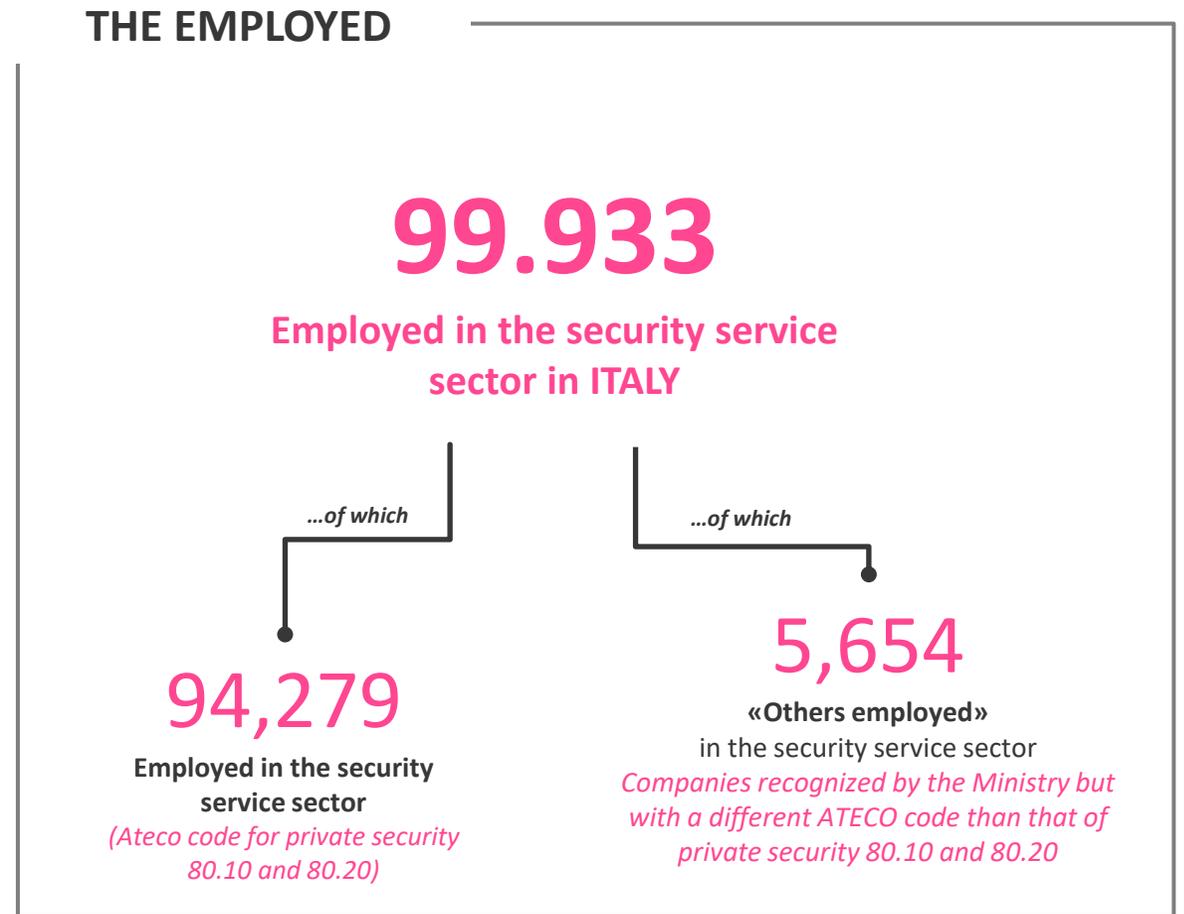- Social dialogue
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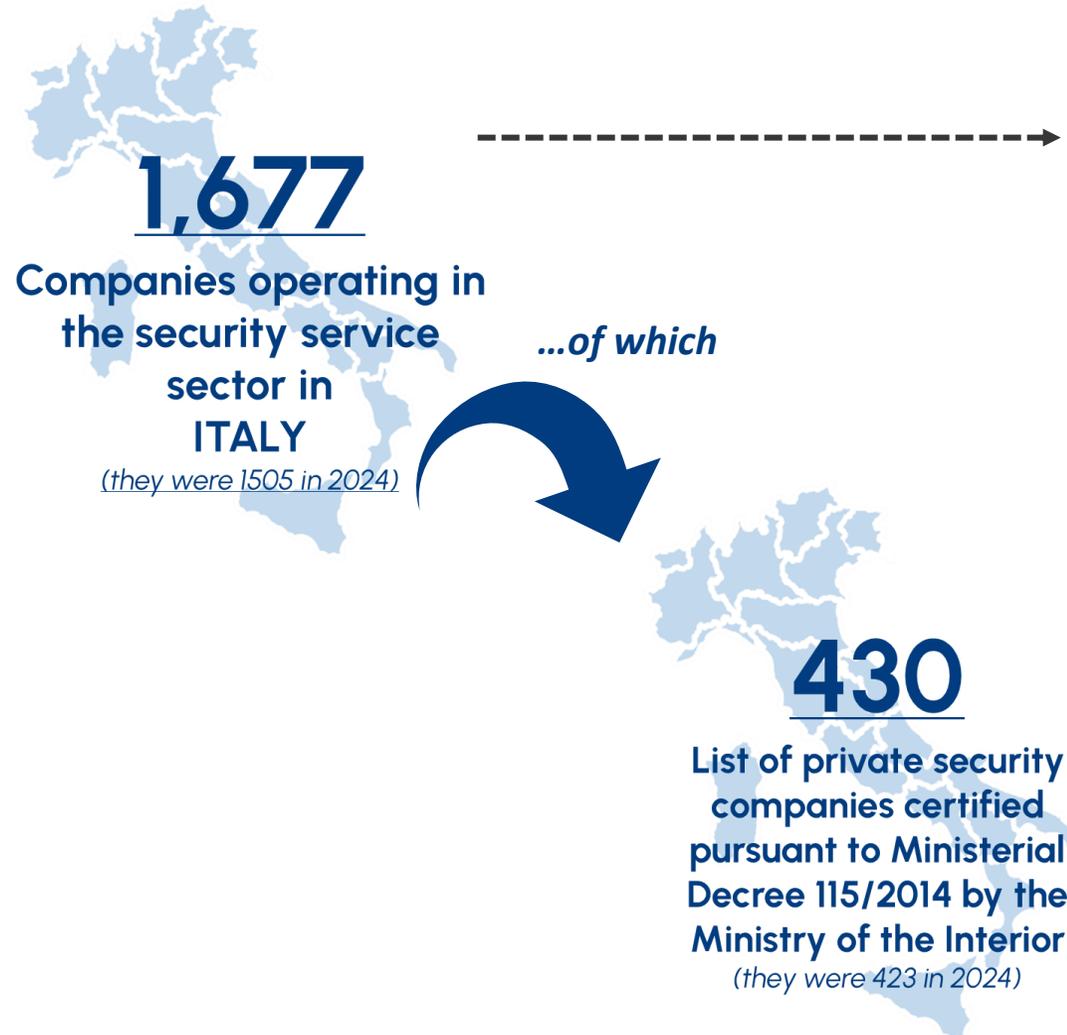- Sample characteristics

METHOD

Glossary |

Levels of education

Italian Level of Education	English Equivalent	Description	Approximate UK/US Equivalent
Scuola media o superiore	**Secondary education / High school**	Education for students aged about 11–19, including lower and upper secondary levels leading to a final diploma.	*Secondary school (UK) / Middle & High school (US)*
Formazione professionale/ Qualifica di base	**Vocational training / Professional qualification**	Practical and technical training aimed at developing job-oriented skills, often provided by training centers or institutes.	*Vocational Education and Training (VET) / Technical qualification / Apprenticeship program*
Livello accademico (Laurea triennale, Magistrale, Dottorato)	**Higher education /Academic degree**	University-level education including Bachelor's, Master's, and PhD programs. Represents the highest formal education level.	*Bachelor's degree / Master's degree / PhD (Doctorate)*

Job Positions

Italian Equivalent	English Term	Description (EN)	Typical Roles / Functions
Servizi operativi di sicurezza	**Operational security services**	Core activities involving active protection of people, property, and sites. May include armed or unarmed duties and emergency response.	Security guards, patrol officers, armed guards (GPG), event security staff, cash-in-transit personnel
Servizi fiduciari e di portierato	**Reception and concierge security services**	Front-of-house and access-control activities focused on surveillance, assistance, and customer relations without armed duties.	Receptionists, concierge staff, access control attendants, unarmed security personnel
Centrali operative	**Operation center/ Control room operations**	Monitoring and coordination of field staff and alarm systems through technological control centers.	Control room operators, dispatchers, alarm monitoring staff, communication coordinators
Ruoli amministrativi e logistici	**Administrative and logistics roles**	Support functions ensuring the organization's operational efficiency, resource management, and logistics coordination.	Administrative clerks, HR assistants, logistics coordinators, office managers

Please note: Regardless of your level of education, in order to work in the security sector, you must complete a training program. Therefore, according to the law, those working in the operational security services sector (e.g., security guards) must have obtained a specific and mandatory professional qualification.

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AGENDA

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General Summary Considerations | Worker Survey

- The private security sector appears stable but not particularly attractive to younger workers. The main concerns relate to inflation and the cost of living (77,1%), while salary and benefits (79%), along with work-life balance (78,1%), remain the most important factors in choosing and staying in a job.

- Many workers enter the sector through family experience (58,1%) or word of mouth, yet nearly half feel their expectations have not been met, mainly due to low pay (40,1%) and limited career prospects (39.9%). Sixty percent recognize the sector's contribution to public security, although communication about its role remains weak.

- Only one in five workers rates their working conditions positively, while half call for fairer pay and greater flexibility.

- Nevertheless, more than 70% place high value on social responsibility and on their own contribution to public security.

- Career opportunities and training emerge as areas for improvement: only one-third see real prospects for advancement, but more than half aspire to leadership roles, and 58,1% consider their training adequate.

- Overall, the sector offers stability and a sense of belonging but requires greater investment in pay, professional development, and training innovation to attract the next generation.

AGENDA

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Workers' Personal Concerns | For workers, the most important personal concerns are the impact of inflation and the cost of living (77.1%), and crime, safety, and security (59%). These concerns are particularly prevalent among workers with a university degree.

Please select your three most important personal concerns today:
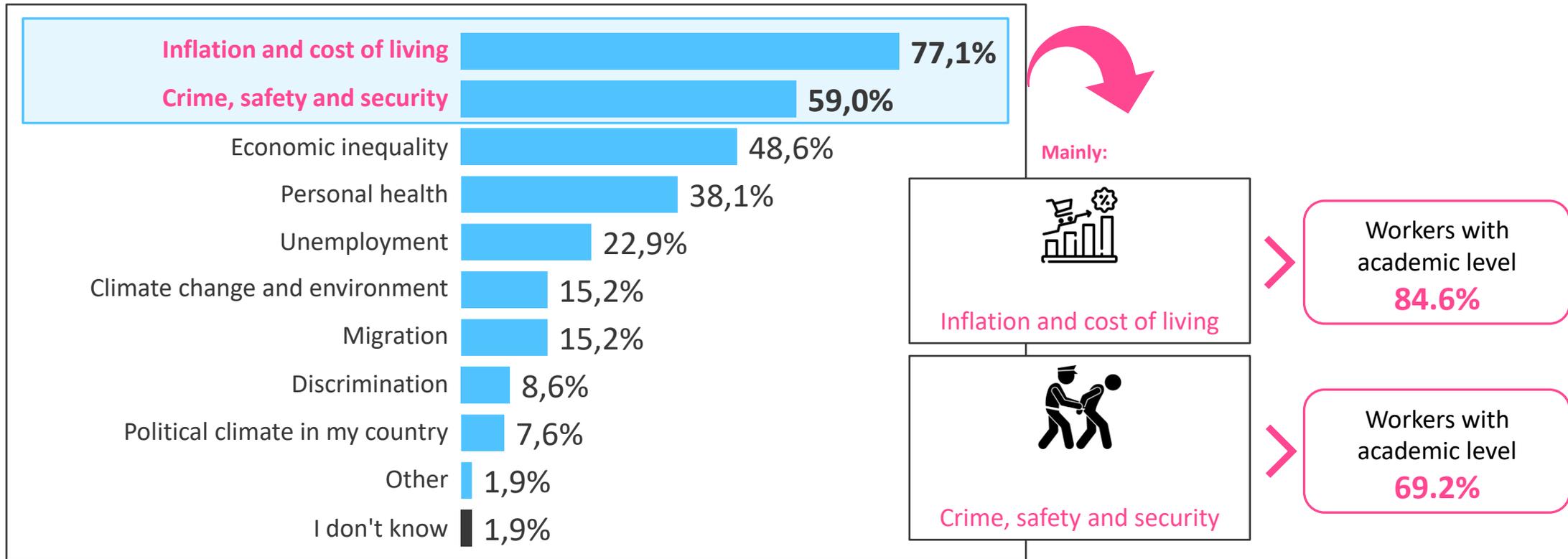
Concern	%
Inflation and cost of living	**77,1%**
Crime, safety and security	**59,0%**
Economic inequality	48,6%
Personal health	38,1%
Unemployment	22,9%
Climate change and environment	15,2%
Migration	15,2%
Discrimination	8,6%
Political climate in my country	7,6%
Other	1,9%
I don't know	1,9%

Mainly:

Inflation and cost of living

> Workers with academic level **84.6%**

Crime, safety and security

> Workers with academic level **69.2%**

Sample base : 105 cases. The sum of the percentages is greater than 100 because multiple responses were allowed.

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Drivers of Job Choice | Among the most important drivers to choose a job for workers are compensation and benefits (79%), followed by work-life balance (78.1%). These factors are preferred by the majority of workers with a university degree.

Imagine you chose a new job: what would be the three most important factors for you to look out for?
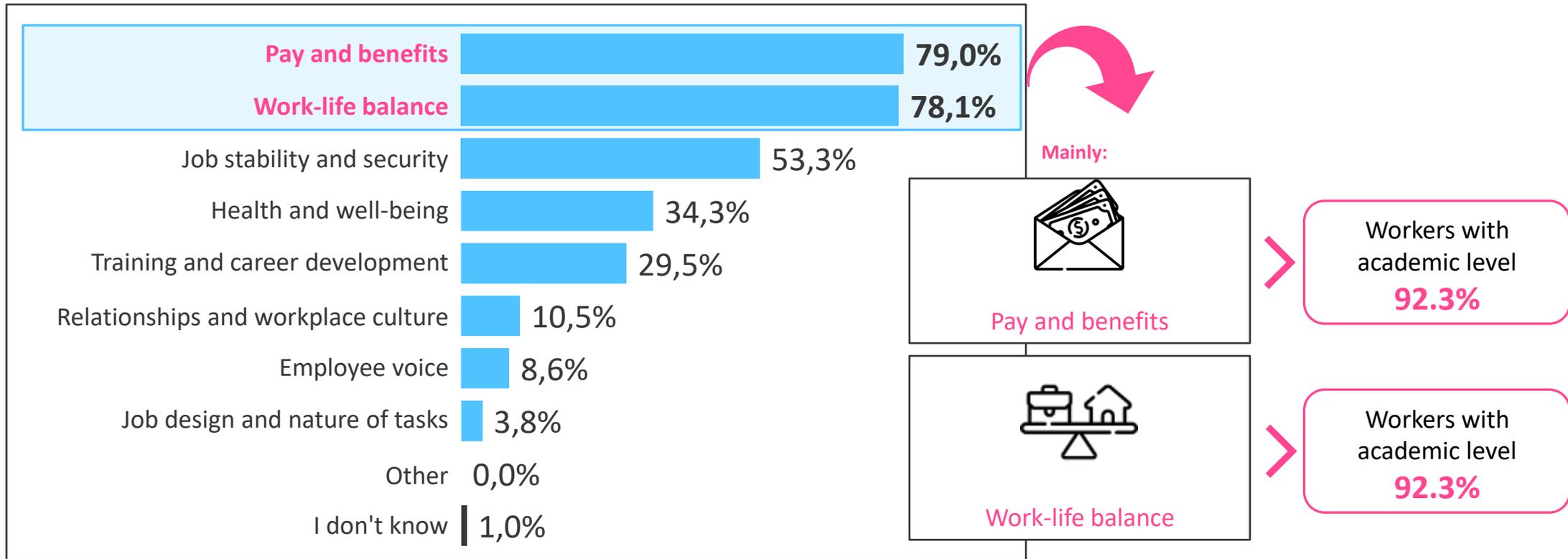
Pay and benefits	**79,0%**
Work-life balance	**78,1%**
Job stability and security	53,3%
Health and well-being	34,3%
Training and career development	29,5%
Relationships and workplace culture	10,5%
Employee voice	8,6%
Job design and nature of tasks	3,8%
Other	0,0%
I don't know	1,0%

Mainly:

Pay and benefits

> Workers with academic level **92.3%**

Work-life balance

> Workers with academic level **92.3%**

Sample base : 105 cases. The sum of the percentages is greater than 100 because multiple responses were allowed.

Drivers of Job Retention | For 80% of workers, the compensation package and benefits are the main reason they stay with a company, especially among those with an academic background. Work-life balance comes in second, at 79%, a factor that is particularly important for graduates.

Please select the three most important reasons for you to stay in a job:

Pay and benefits	80,0%
Work-life balance	79,0%
Job stability and security	49,5%
Health and well-being	35,2%
Training and career development	29,5%
Relationships and workplace culture	10,5%
Employee voice	9,5%
Job design and nature of tasks	5,7%
Other	1,0%
I don't know	0,0%

Mainly:

Pay and benefits → Workers with academic level **84.6%**

Work-life balance → Workers with a diploma **84.8%**

Sample base : 105 cases. The sum of the percentages is greater than 100 because multiple responses were allowed.

Drivers of Job Leaving | 76.2% of workers say they would leave a company because of perceived inadequate pay and benefits, a particularly common reason among those with a university degree. In 75.2% of cases, however, the main reason is work-life imbalance, a factor also cited primarily by workers with an academic background.

What would be the three most important reasons for you to leave a job?

Pay and benefits	**76,2%**
Work-life balance	**75,2%**
Health and well-being	48,6%
Job stability and security	38,1%
Training and career development	15,2%
Relationships and workplace culture	13,3%
Job design and nature of tasks	9,5%
Employee voice	7,6%
Other	1,9%
I don't know	4,8%

Mainly:

Pay and benefits → Workers with academic level **93.3%**

Work-life balance → Workers with academic level **84.6%**

Sample base : 105 cases. The sum of the percentages is greater than 100 because multiple responses were allowed.

Format research

AGENDA

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- Perception of training and skills
- Social dialogue
- Sample characteristics

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METHOD

Family experience in the security sector | 58.1% of workers report having family experience in the security sector. This is particularly true for men, young people between the ages of 20 and 24, and those with professional training.

Have any of your relatives or or people in your personal relations ever worked in the private or public security sector before you enrolled the private security sector?

58.1%
Yes, my relatives or acquaintances have worked in the security sector

41.9%
No, my relatives or acquaintances have never worked in the security sector

Mainly:

Workers with professional qualification	Male	Workers aged between 20 and 24
65.4%	**60.2%**	**83.3%**

Sample base : 105 cases.
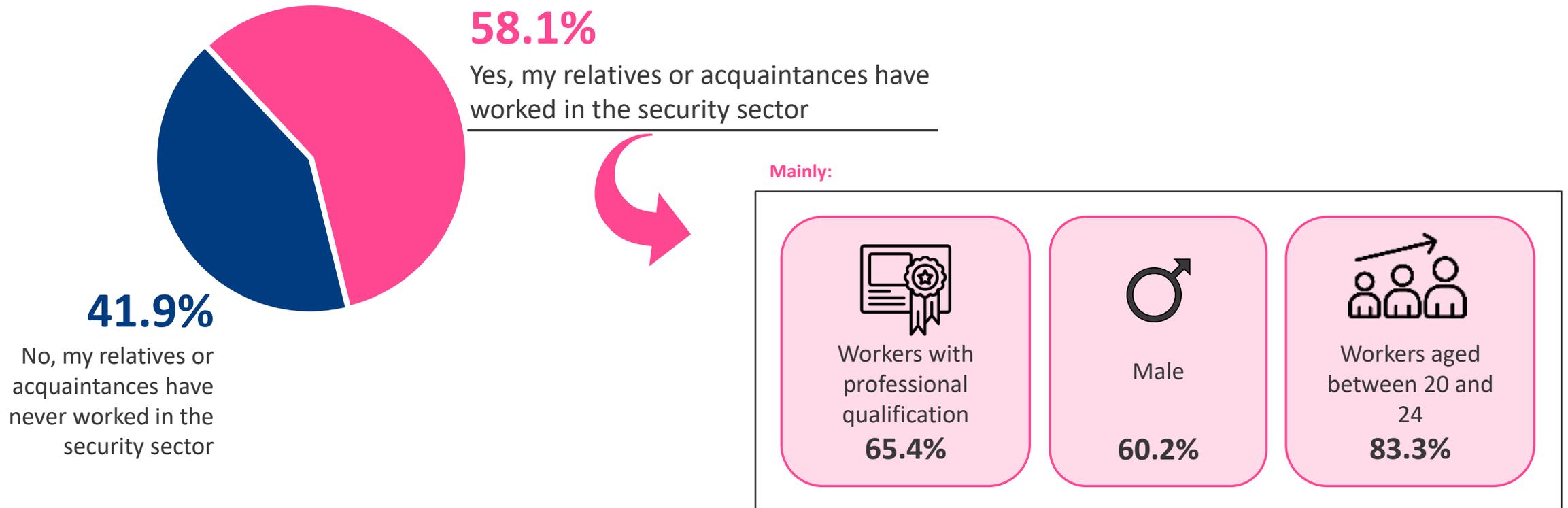
Industry Knowledge | More than half of workers (51.4%) say they learned about the sector through personal contacts and word of mouth, a channel particularly highlighted by male workers between the ages of 20 and 24 and workers currently employed in Operational Security Services. Percentages related to public employment services and social media campaigns (4.8%) are rather low, indicating channels that employers should explore and promote further.

How did you learn about working in private security services?
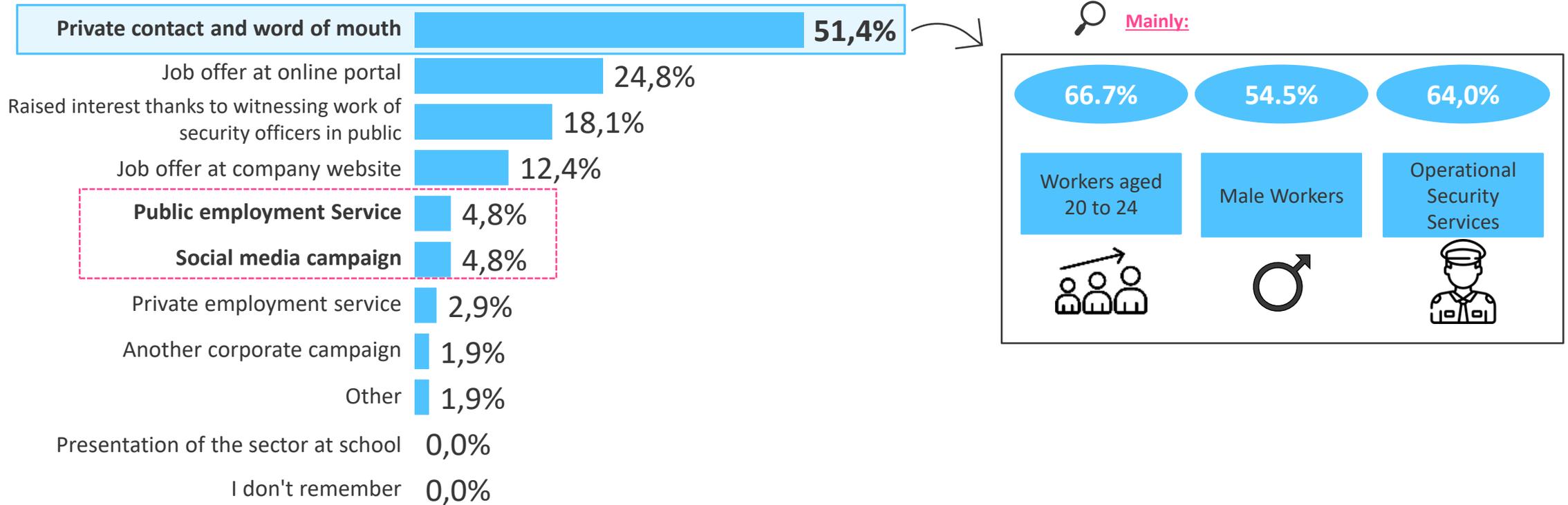
Private contact and word of mouth	51,4%
Job offer at online portal	24,8%
Raised interest thanks to witnessing work of security officers in public	18,1%
Job offer at company website	12,4%
Public employment Service	4,8%
Social media campaign	4,8%
Private employment service	2,9%
Another corporate campaign	1,9%
Other	1,9%
Presentation of the sector at school	0,0%
I don't remember	0,0%

Mainly:

66.7%	54.5%	64,0%
Workers aged 20 to 24	Male Workers	Operational Security Services

Sample base : 105 cases. The sum of the percentages is greater than 100 because multiple responses were allowed.

Job Expectations | The main expectations workers expect before embarking on their career in the sector are job and financial stability (47.1%), followed by dedication to the uniform (32.3%) and opportunities for personal growth (20.5%).

Before you started working in the industry, what were your main expectations of work in the security services?

47.1 %	**32.3 %**	**20.5 %**
Job and economic stability	Commitment to the uniform	Professional growth
"A decent salary for the role performed"	*"To protect, serve, uphold the law and justice"*	*"A world where I would have had a good chance of growing up."*

Sample base : 39 cases. Only those who specified their answer. Values re-percented net of "no particular expectations" (12.8%).

Job Expectations Matched | 61.9% of workers stated that their expectations matched (fully or mostly) their actual work experience. This finding is particularly evident among young people between 20 and 24, women, and those with professional qualifications.

To which extent did your job expectations match your job reality?

The **61.9%** of workers say that their expectations correspond partially or completely to the reality of their work

Mainly:

Workers aged between 20 and 24	Female	Workers with professional qualification
66.6%	86.7%	69.2%

6,7%
I don't know

15,2%
Not at all

16,2%
Mostly not

53,3%
Yes, mostly

8,6%
Yes, fully

Sample base : 105 cases.
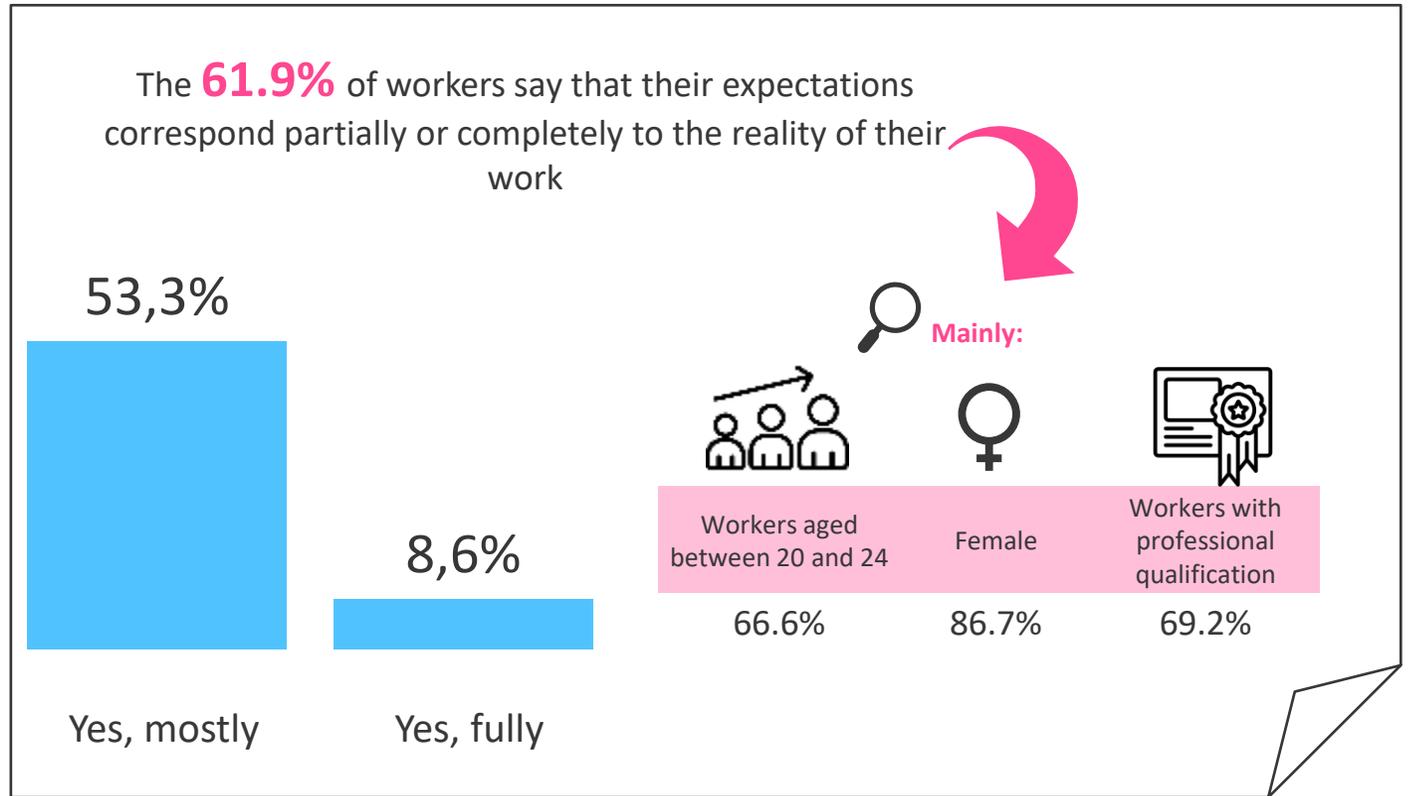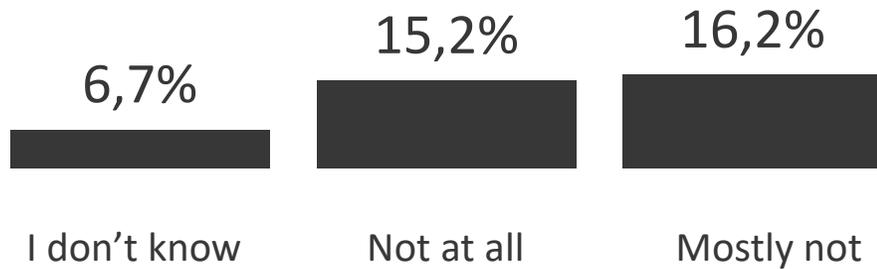
Matching Job Expectations | 20% of workers believe their expectations have been met, both financially and in terms of career development opportunities. Conversely, the main reasons for expectations not being met include the perception of inadequate pay (40.1%) and poor recognition with limited opportunities for career development (39.9%).

Can you explain why?

Reasons for the **failure** to meet workers' expectations

40.1 %
Inadequate remuneration

39.9 %
Dissatisfaction due to lack of enhancement and/or few opportunities for growth

Reasons for the **correspondence** to workers' expectations

20.0%
The job is satisfactory in terms of duties, pay, and growth

Sample base : 45 cases. Only those who specified their answer. Values re-percented net of ""No indication" (11.1%).

Evaluation of the onboarding process | The onboarding process was rated positively by 60% of workers, adequately by 24.8%, and negatively by 14.2%.

On a scale of 1 to 5, how did you perceive your on-boarding process at your current employer in the private security services?

Legend

Negative	Sufficient	Positive
Vote 1-2	Vote 3	Vote 4-5

I don't know	Negative	Sufficient	Positive
1,0%	14,2%	24,8%	60,0%

Sample base : 105 cases.
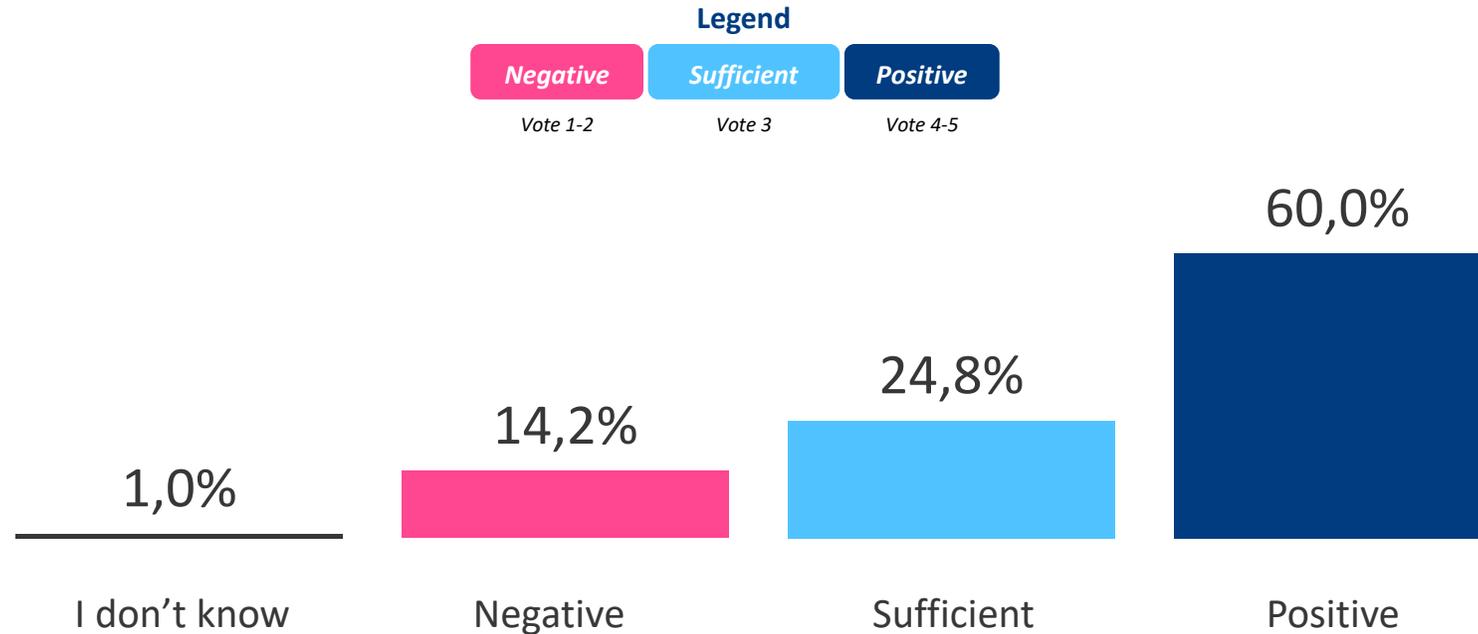
Recommendations for the onboarding process | Workers' top recommendations for improving onboarding processes primarily concern greater attention to the recruiting and onboarding phases (25.7%) and the introduction of a more appropriate entry-level salary (15.2%).

Would you have any recommendations on how to improve on-boarding processes of employers for workers joining the private security services?

25.7% Place greater emphasis on recruiting and onboarding processes	**15.2 %** Provide appropriate salary and compensation	**8.6%** Increase investment on staff training
6.7% Improve and make working hours, shifts and rest more flexible	**5.7%** Attributing the right value to staff skills	**38.1%** No indication

Sample base : 105 cases.

Format
research

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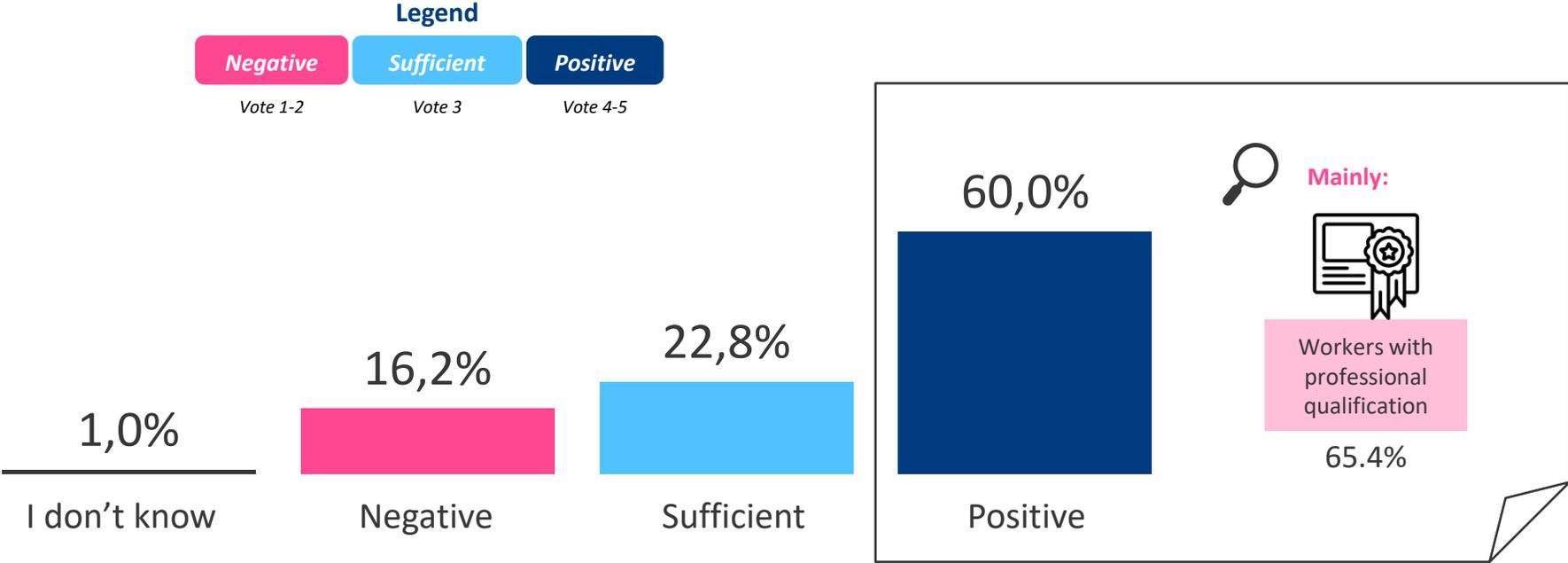- Sample characteristics

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Evaluation of the Contribution of Security Services | 60% of workers express a positive opinion of the role of private security services in supporting public safety, 22.8% rate it as adequate, and 16.2% have a negative view.

On a scale of 1 to 5, how do you see the value of private security services to public security?

Legend

Negative	Sufficient	Positive
Vote 1-2	Vote 3	Vote 4-5

60,0%

Mainly:

Workers with professional qualification

65.4%

1,0%
I don't know

16,2%
Negative

22,8%
Sufficient

Positive

Sample base : 105 cases.

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Communication of the public debate | 28.6% of workers believe that communication of the public debate on the contribution of private security services to public safety is positive. Conversely, 52.4% view it negatively, a perception particularly widespread among workers who work in Operational Security Services (64,0%).

How do you think public debate communicates the value of private security services for public safety?

Reading example: Among the workers in Operational Security Services, 64% of them responded negatively.

64,0%
Operational Security Services

Data obtained by cross-referencing the variable **CURRENT JOB POSITION**

19.0%

I don't know

52.4%

In a negative way

28.6 %

In a positive way
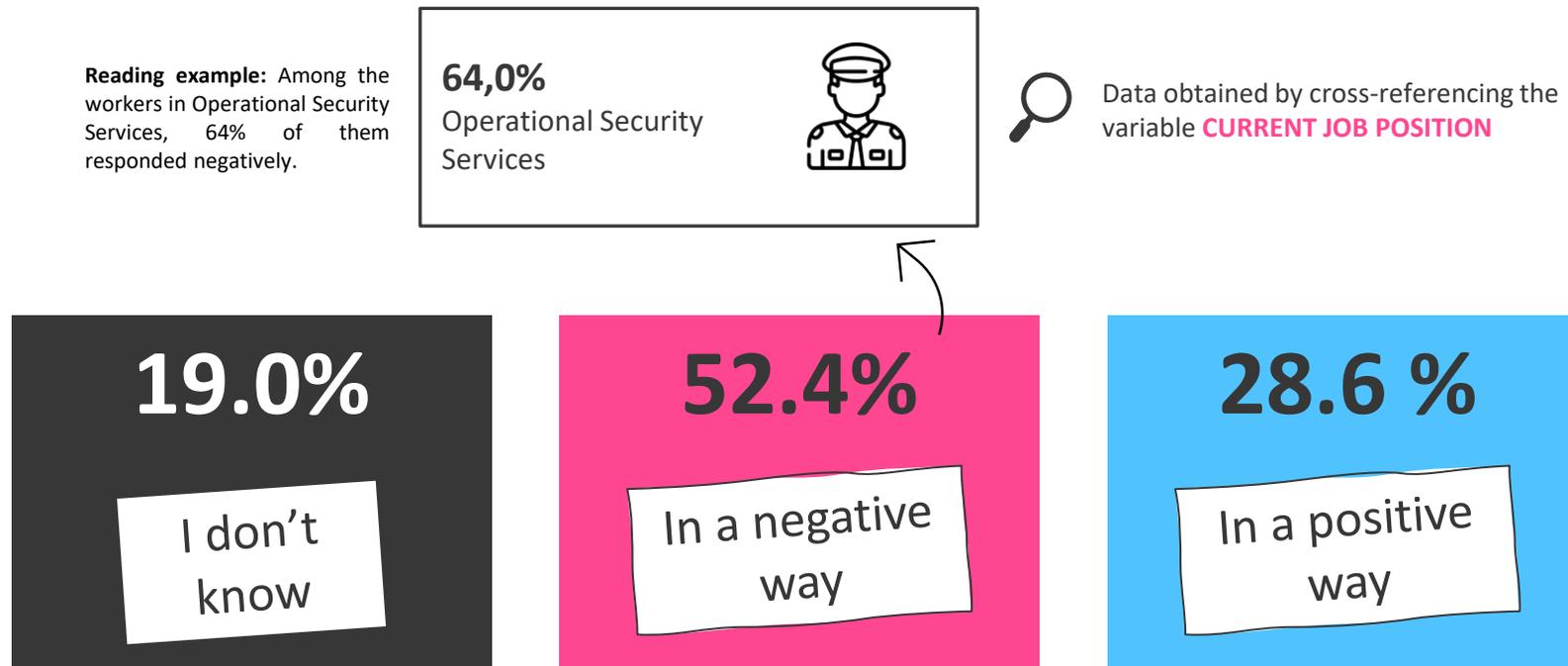
Perception of working conditions | 19.1% of workers report a positive assessment of their working conditions, a view shared primarily by workers with professional qualifications. Conversely, 43.8% of workers report a negative perception of working conditions in the sector. This negative assessment is shared primarily by workers with academic qualifications.

On a scale of 1 to 5, how do you perceive working conditions in the sector?

Legend

Negative	Sufficient	Positive
Vote 1-2	Vote 3	Vote 4-5

Mainly:

Workers with academic level

61.6%

43.8%
Negative

37.1%
Sufficient

19.1%
Positive

Mainly:

Workers with professional qualification

30.7%

Sample base : 105 cases.

Format research
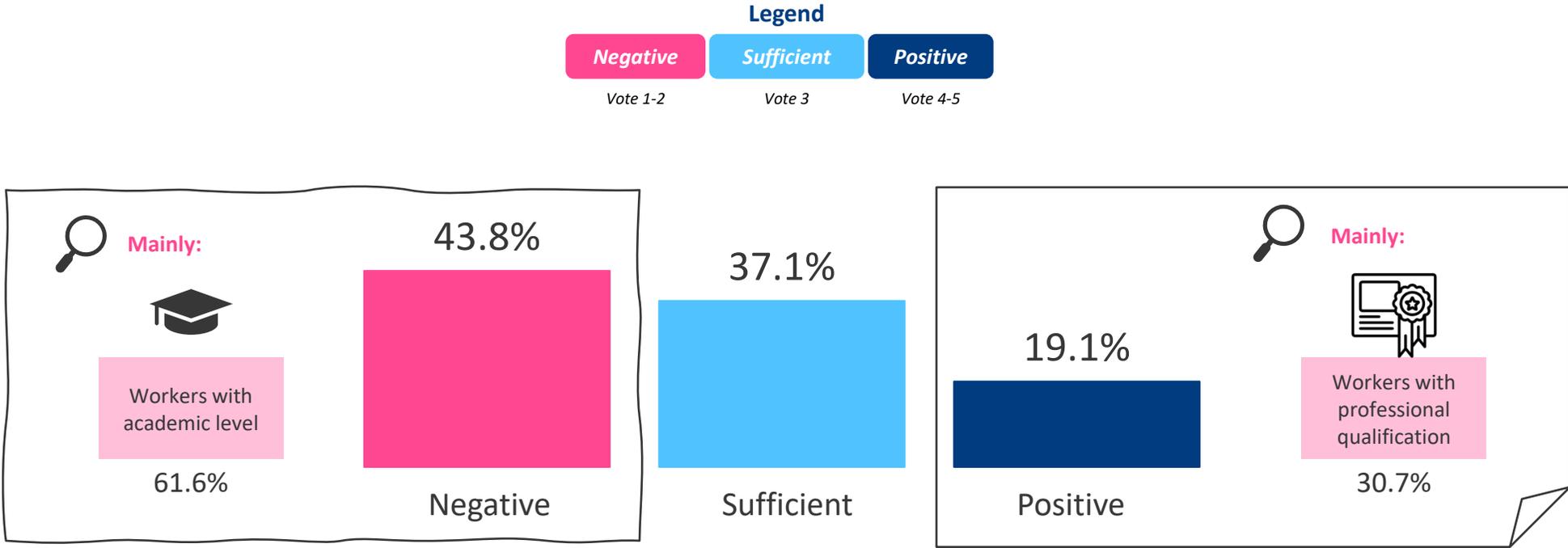
Improved working conditions | 50% of workers cite salary adjustments as their main suggestion for improving their conditions, followed by 23.6% who suggest increasing flexibility in working hours, shifts, and rest days. Furthermore, 12.5% of employees believe it is important to better develop their personal skills and pay more attention to staff training.

What could be improved?

50.0 %

Adjust wages and compensation

"The wages could be improved, as they are too low at 5 euros an hour."

23.6 %

Improve and make working hours, shifts and rest periods more flexible

«Working hours and better shift organization»

12.5%

Enhancing staff skills and increase staff training actions

8.3 %

Changing the sector contract and enhancing professional status

"Contractual reform and regulatory recognition of the GPG role"

5.6%

Increasing workplace safety

"Workplace safety and increased controls"

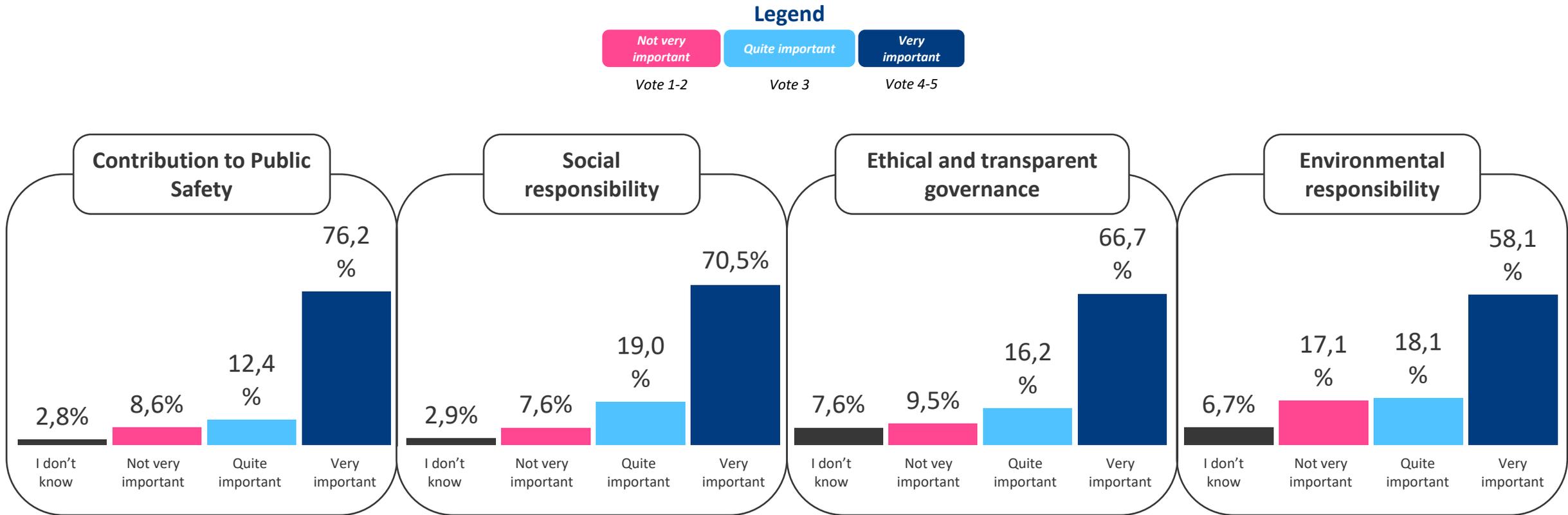**Sample base** : 79 cases. Only those who specified their answer. Values re-percented net of ""No indication" (8.8%).

Corporate Social Responsibility | Most workers place great importance on their company's social responsibility: 76.2% consider contributing to public security very important, 70.5% consider social responsibility very important, 66.7% consider ethical and transparent governance very important, and 58.1% consider environmental responsibility very important.

On a scale of 1 to 5, how important is your employer's corporate social responsibility (ethical, environmental, and social) to you?

Legend

Not very important	Quite important	Very important
Vote 1-2	Vote 3	Vote 4-5

Contribution to Public Safety

- I don't know: 2,8%
- Not very important: 8,6%
- Quite important: 12,4%
- Very important: 76,2%

Social responsibility

- I don't know: 2,9%
- Not very important: 7,6%
- Quite important: 19,0%
- Very important: 70,5%

Ethical and transparent governance

- I don't know: 7,6%
- Not vey important: 9,5%
- Quite important: 16,2%
- Very important: 66,7%

Environmental responsibility

- I don't know: 6,7%
- Not very important: 17,1%
- Quite important: 18,1%
- Very important: 58,1%

Sample base : 105 cases.

Perceptions of discrimination at work | Regarding discrimination based on ethnicity, religion, gender, or against workers with disabilities, the majority of employees agree that such discrimination is absent in their workplace, highlighting widespread support for equal treatment and opportunities. The insights for women are not reported due to the limited number of female respondents.
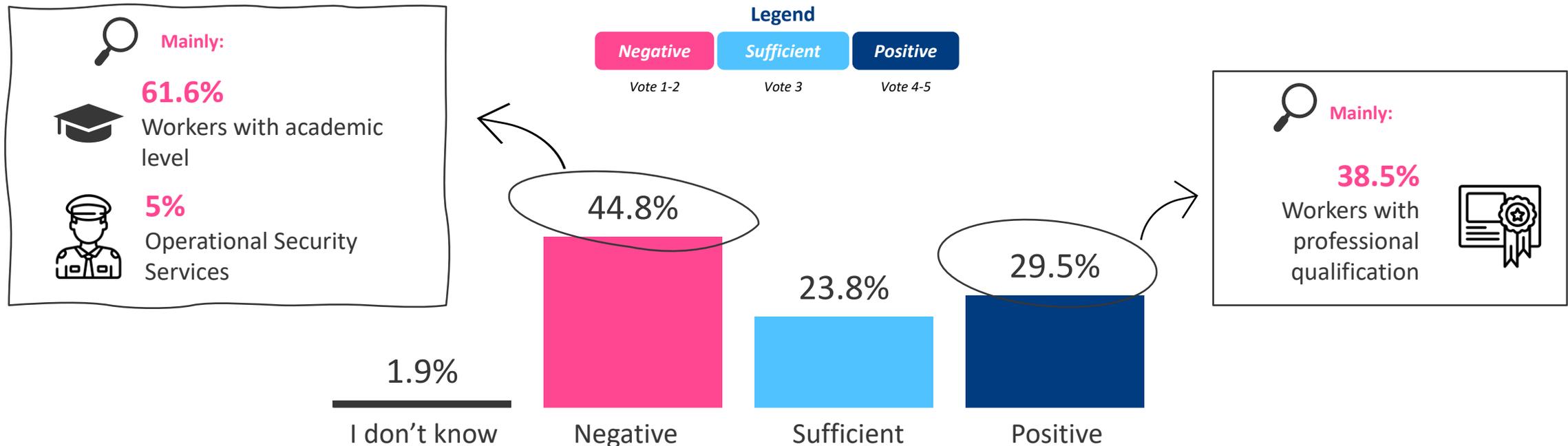
Do you agree with the following statements?

Legend

| Agree | In disagreement | I don't know |

Women face no discrimination at my workplace, are equally treated and have the same opportunities

76,2% | 14,3% | 9,5%

People displaying different religious beliefs face no discrimination at my workplace, are equally treated and have the same opportunities

73,3% | 6,7% | 20,0%

People with a different ethnic background face no discrimination at my workplace, are equally treated and have the same opportunities

71,4% | 9,5% | 19,0%

LGBTQIA+ people face no discrimination at my workplace, are equally treated and have the same opportunities

64,8% | 8,6% | 26,7%

People with disabilities face no discrimination at my workplace, are equally treated and have the same opportunities

63,8% | 11,4% | 24,8%

Sample base : 105 cases. The data have limited informational value since the profile of the respondents is unknown..
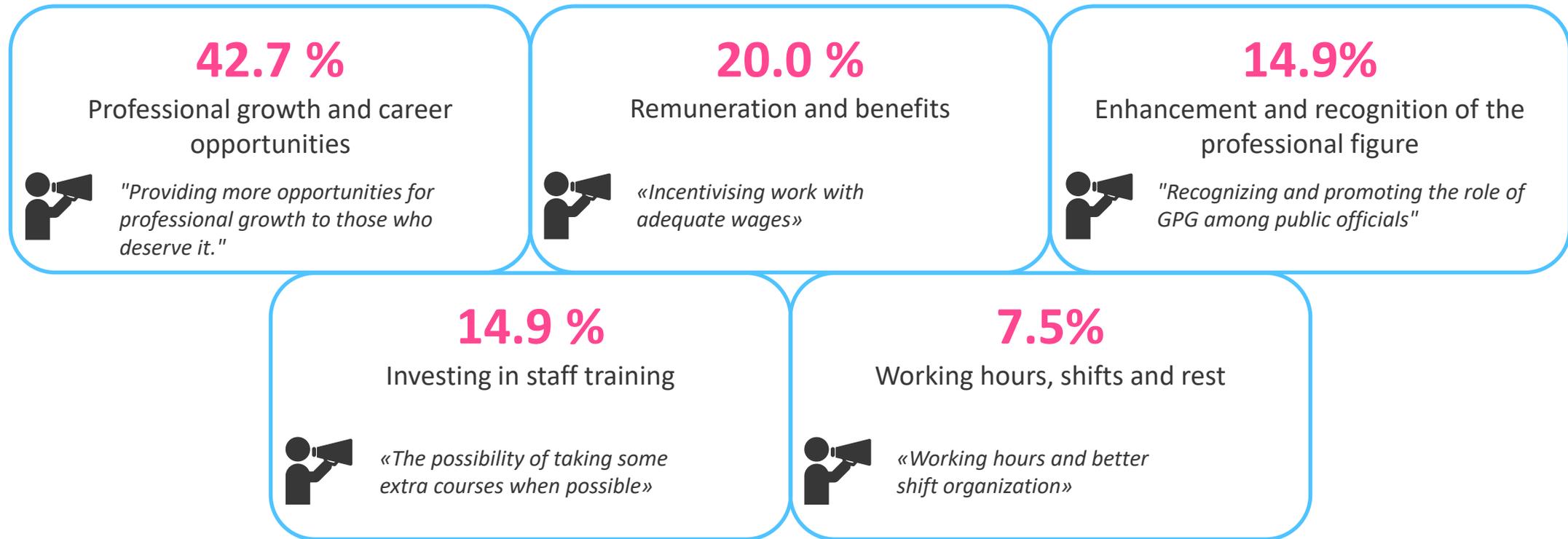
Career Development Opportunities | Approximately 30% of workers view career development opportunities in the private security sector positively, particularly those with professional qualifications. Conversely, 44.8% express a negative opinion, especially among workers with academic backgrounds and those employed in Operational Security Services. The insights for women are not reported due to the limited number of female respondents.

On a scale of 1 to 5, how do you perceive the professional development opportunities in the industry?

Mainly:

61.6%
Workers with academic level

5%
Operational Security Services

Legend

Negative	Sufficient	Positive
Vote 1-2	Vote 3	Vote 4-5

Mainly:

38.5%
Workers with professional qualification

44.8%

23.8%

29.5%

1.9%

I don't know | Negative | Sufficient | Positive

Sample base : 105 cases.

Format research

Professional Development Opportunities | To improve professional development opportunities, 42.7% of workers suggest increasing professional growth opportunities, providing greater scope for career advancement; 20% suggest improving compensation; and 14.9% suggest enhancing and recognizing the professionalism of workers. It is important to point out that more than 50% of the workers interviewed did not specify their response.
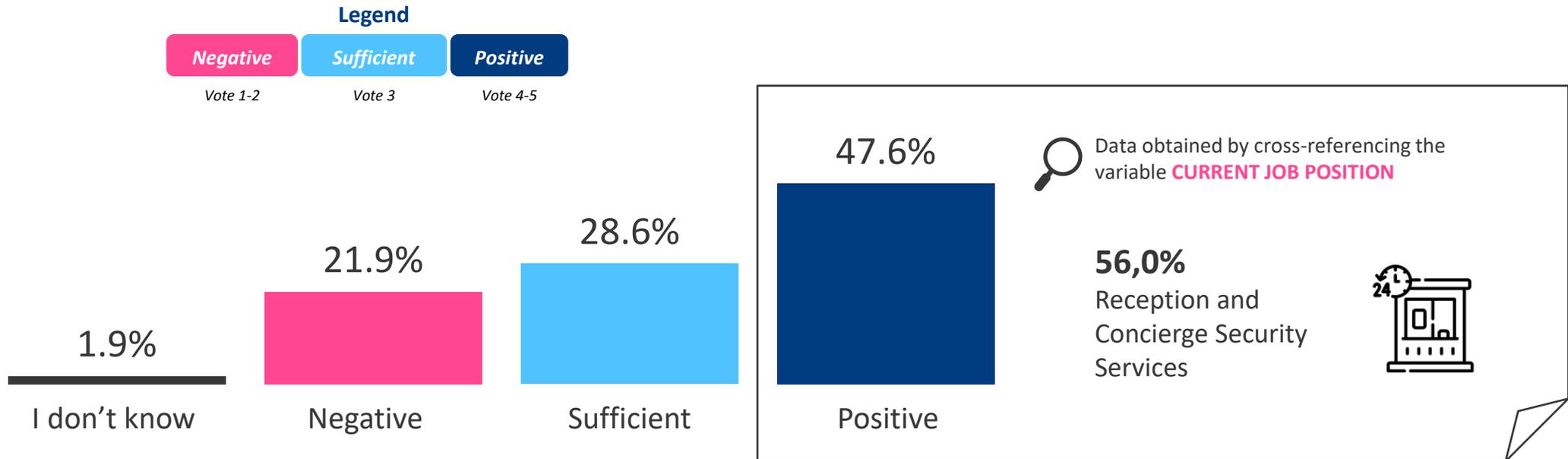
What could be improved?

42.7 %

Professional growth and career opportunities

"Providing more opportunities for professional growth to those who deserve it."

20.0 %

Remuneration and benefits

«Incentivising work with adequate wages»

14.9%

Enhancement and recognition of the professional figure

"Recognizing and promoting the role of GPG among public officials"

14.9 %

Investing in staff training

«The possibility of taking some extra courses when possible»

7.5%

Working hours, shifts and rest

«Working hours and better shift organization»

Sample base : 49 cases. Only those who specified their answer. Values re-percented net of "No indication" (18.4%).
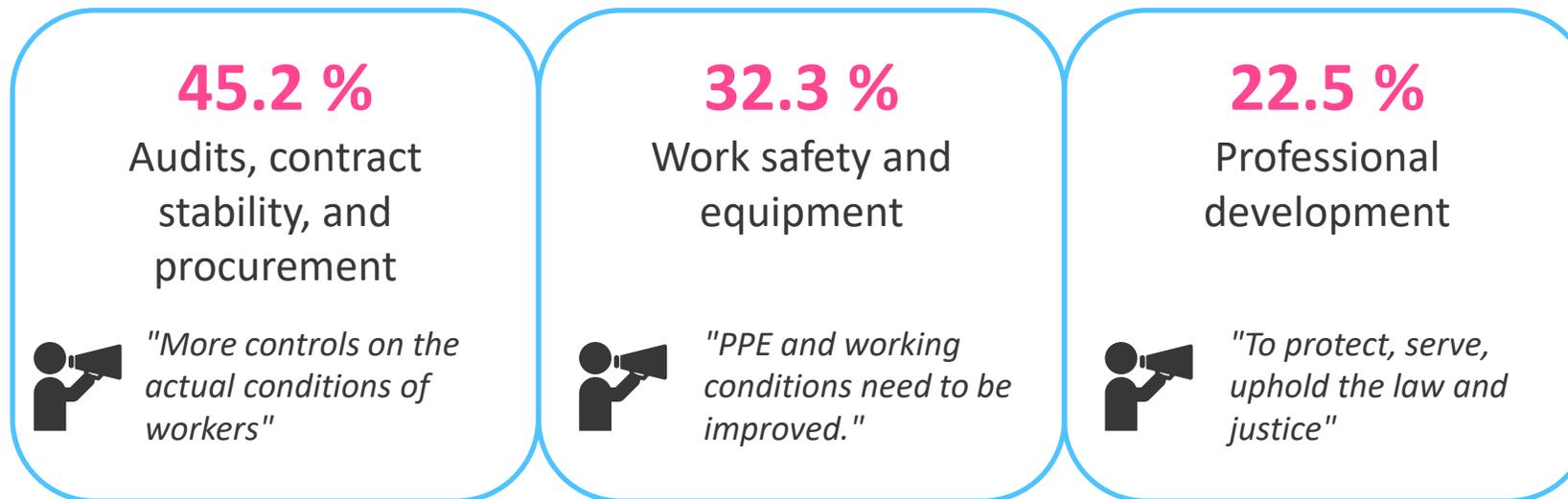
Format
research

Job stability and security | 47.6% of workers rate job stability and security in the private security sector positively. This opinion was expressed primarily by workers currently working in Reception and Concierge Security Services (56,0%).

On a scale of 1 to 5, how do you perceive job stability and security in the industry?

Legend

Negative	Sufficient	Positive
Vote 1-2	Vote 3	Vote 4-5

1.9% — I don't know
21.9% — Negative
28.6% — Sufficient
47.6% — Positive

Data obtained by cross-referencing the variable **CURRENT JOB POSITION**

56,0%
Reception and Concierge Security Services

Sample base : 105 cases.

Job stability and safety | 45.2% of workers cite increased supervision and greater contractual stability as their top priorities for improving job stability and safety. 32.3% emphasize the need to invest in safety through the adoption of protective equipment, while 22.5% call for greater professional development.

What could be improved?

45.2 %	**32.3 %**	**22.5 %**
Audits, contract stability, and procurement	Work safety and equipment	Professional development
"More controls on the actual conditions of workers"	*"PPE and working conditions need to be improved."*	*"To protect, serve, uphold the law and justice"*

Sample base : 36 cases. Only those who specified their answer. Values re-percented net of "No indication" (13.9%).

AGENDA

PRESENTATION OF THE SURVEY

MAP OF THE PRIVATE SECURITY SECTOR IN ITALY

GLOSSARY

WORKERS

- General summary considerations
- Values and motivations in the workplace
- Entering the private security sector and expectations
- Perception of the private security sector and working conditions
- Perception of professional development and career prospects
- Perception of training and skills
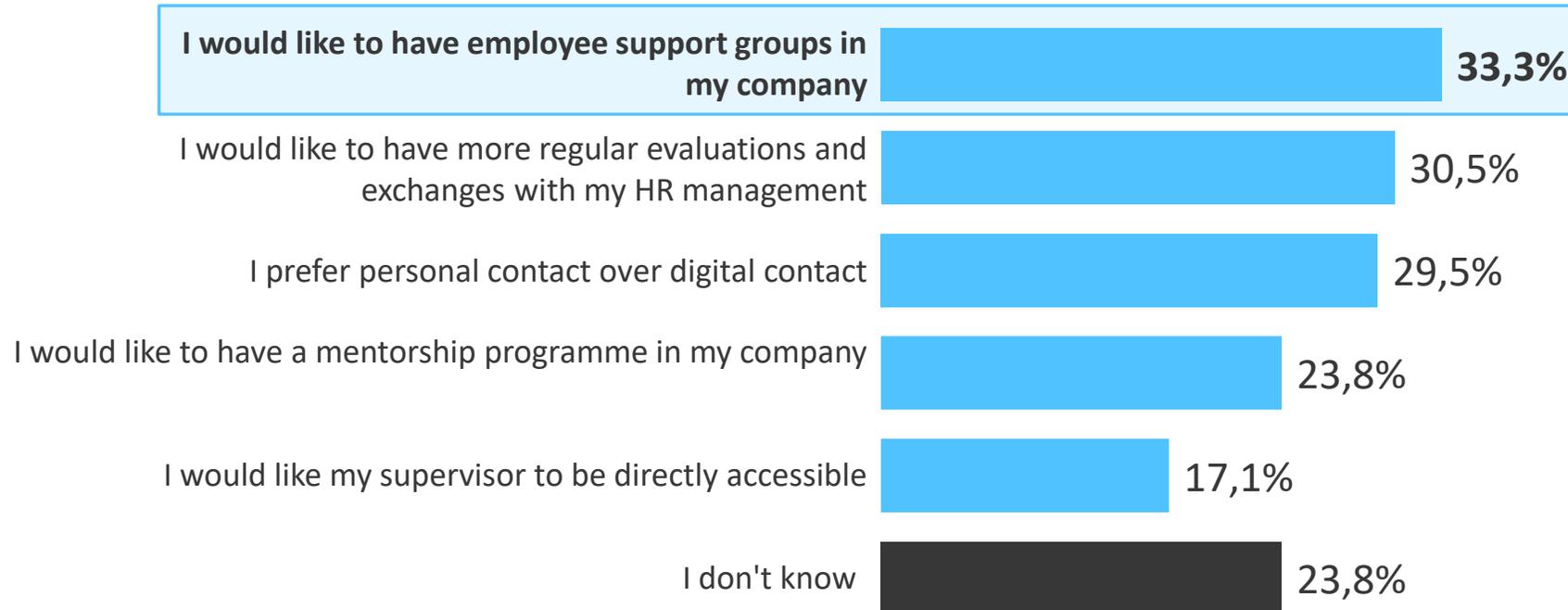- Social dialogue
- Sample characteristics

POTENTIAL WORKERS

- General summary considerations
- Values and motivations in the workplace
- Entering the private security sector and expectations
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- Sample characteristics

METHOD

Drivers of development | The factor considered most important for the work environment is, in 33.3% of cases, the introduction of support groups within the company, followed by a regular system of appraisals and meetings with human resources (30.5%).
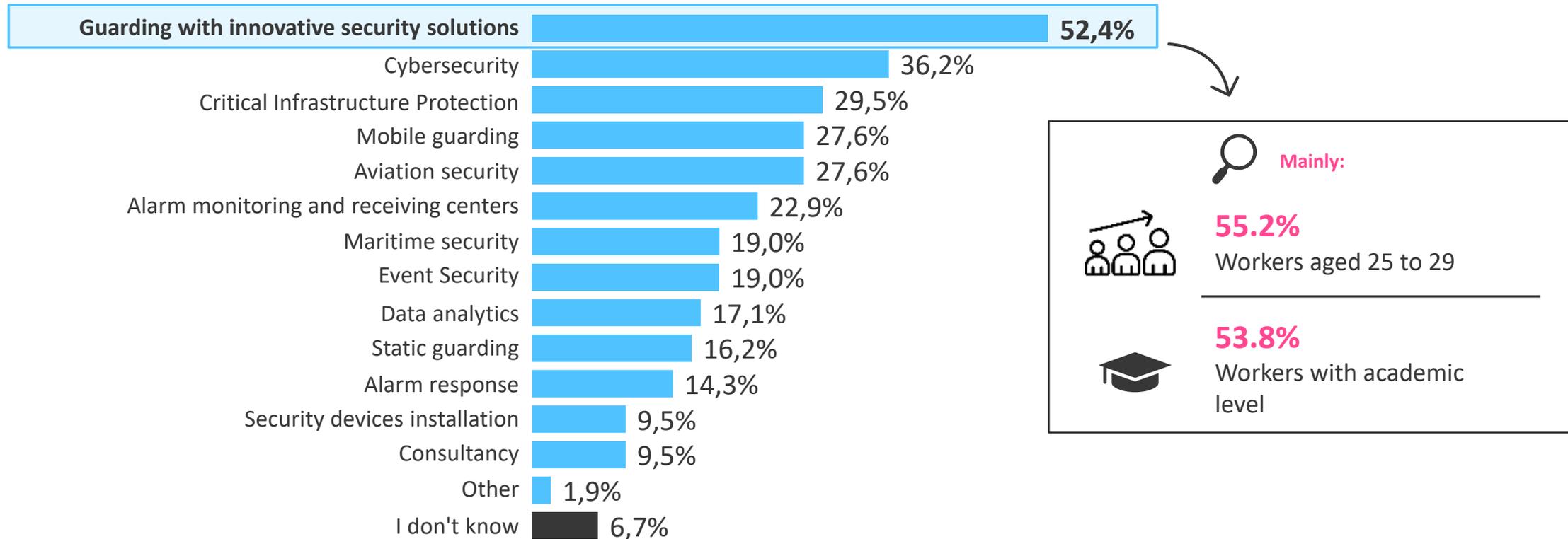
Thinking about your work environment: Which of the following factors are important to you?

I would like to have employee support groups in my company	**33,3%**
I would like to have more regular evaluations and exchanges with my HR management	30,5%
I prefer personal contact over digital contact	29,5%
I would like to have a mentorship programme in my company	23,8%
I would like my supervisor to be directly accessible	17,1%
I don't know	23,8%

Sample base : 105 cases. The sum of the percentages is greater than 100 because multiple responses were allowed.

Job Preferences | 52.4% of workers are interested in security services with innovative security solutions, a position that is especially attractive for workers between 25 and 29 years old (55.2%) and workers with an academic degree.
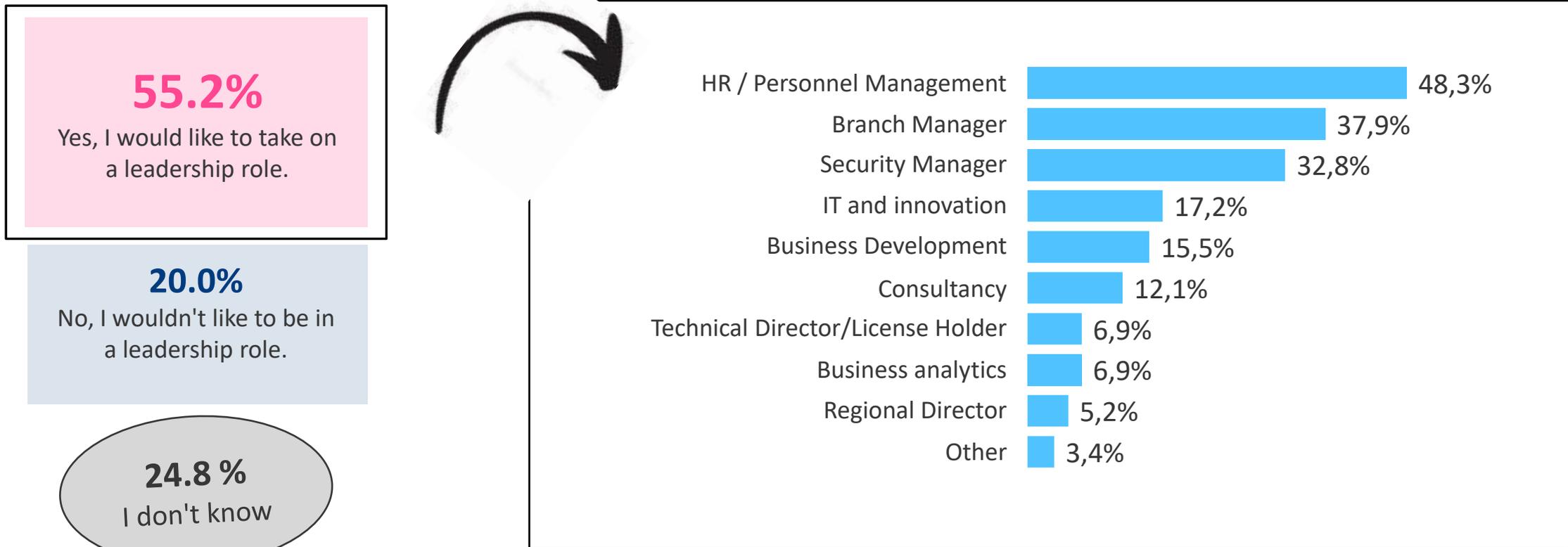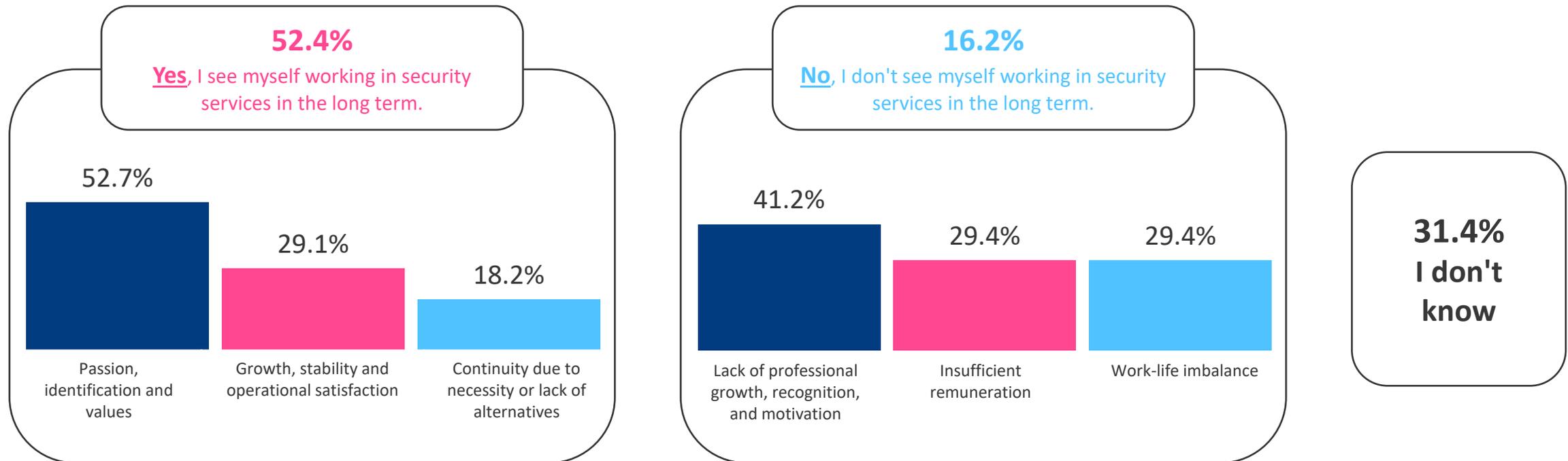
What private security services jobs would you be most interested in in the future?

Guarding with innovative security solutions	**52,4%**
Cybersecurity	36,2%
Critical Infrastructure Protection	29,5%
Mobile guarding	27,6%
Aviation security	27,6%
Alarm monitoring and receiving centers	22,9%
Maritime security	19,0%
Event Security	19,0%
Data analytics	17,1%
Static guarding	16,2%
Alarm response	14,3%
Security devices installation	9,5%
Consultancy	9,5%
Other	1,9%
I don't know	6,7%

Mainly:

55.2%
Workers aged 25 to 29

53.8%
Workers with academic level

Sample base : 105 cases. The sum of the percentages is greater than 100 because multiple responses were allowed.

Leadership Roles | 55.2% of workers in the sector aspire to hold a leadership role in the future. Of these, 48.3% prefer positions in human resources and personnel management, while 37.9% are interested in branch management roles and 32.8% in security management roles.

Would you like to hold a leadership role in your company in the future? If so, what type of leadership role would you like?

55.2%
Yes, I would like to take on a leadership role.

20.0%
No, I wouldn't like to be in a leadership role.

24.8 %
I don't know

HR / Personnel Management	48,3%
Branch Manager	37,9%
Security Manager	32,8%
IT and innovation	17,2%
Business Development	15,5%
Consultancy	12,1%
Technical Director/License Holder	6,9%
Business analytics	6,9%
Regional Director	5,2%
Other	3,4%

Format research

Long-term projection | 52.4% envision continuing to work in the security sector in the long term. Among these, the primary motivation, cited by 52.7%, is passion for the profession and identification with its values. Conversely, 16.2% do not see themselves continuing in this field, primarily due to a lack of professional growth, recognition, and motivation (41.2%).

Do you see yourself working in private security services long-term (5-10 years)? If so, can you explain why? If not, can you explain why?

52.4%
Yes, I see myself working in security services in the long term.

52.7%

29.1%

18.2%

Passion, identification and values

Growth, stability and operational satisfaction

Continuity due to necessity or lack of alternatives

16.2%
No, I don't see myself working in security services in the long term.

41.2%

29.4%

29.4%

Lack of professional growth, recognition, and motivation

Insufficient remuneration

Work-life imbalance

31.4%
I don't know

AGENDA

PRESENTATION OF THE SURVEY

MAP OF THE PRIVATE SECURITY SECTOR IN ITALY

GLOSSARY

WORKERS

- General summary considerations
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- Entering the private security sector and expectations
- Perception of the private security sector and working conditions
- Perception of professional development and career prospects
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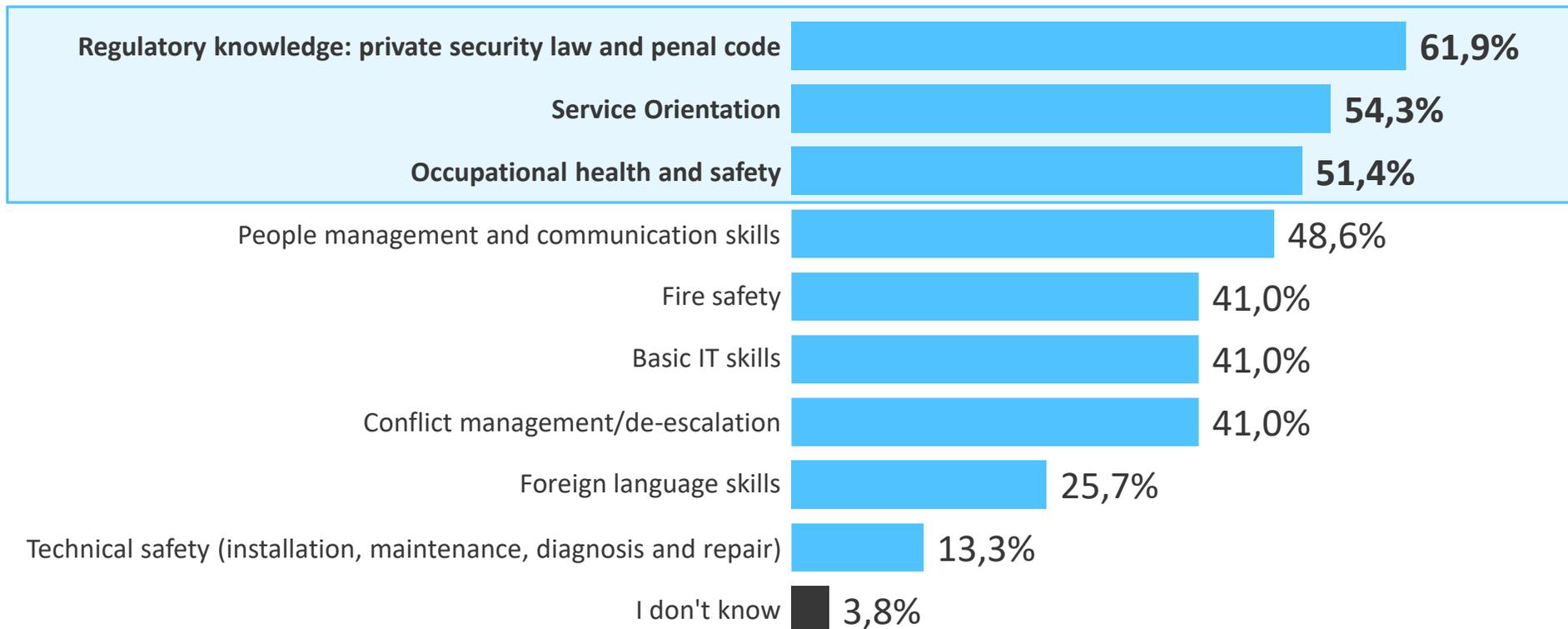- Social dialogue
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POTENTIAL WORKERS

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METHOD

Training Plan | 58.1% of workers believe the training program is adequate for performing their duties, 29.5% believe it is inadequate, and 12.4% are unable to provide an assessment.

Is the current training program sufficient to do your job?

58.1%
Yes, I believe the current training program is sufficient to do my job.

12.4%
I don't know

29.5%
No, I don't think the current training program is sufficient to do my job.

Mainly:

73.1%
Workers with professional qualification

Sample base : 105 cases.
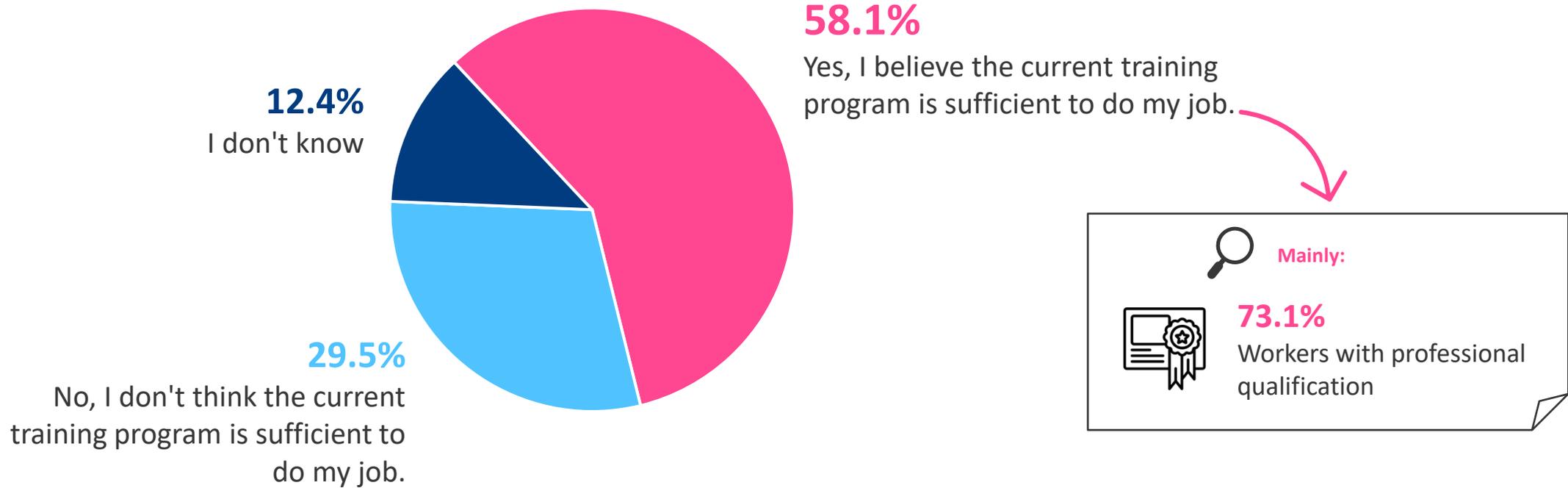
Training Plan | For workers, the priority skills to be acquired during the training/apprenticeship period are knowledge of relevant regulations and elements of criminal law and procedure (61.9%), service orientation (54.3%), and knowledge of occupational health and safety (51.4%).

What skills do you think are important to acquire during initial training/basic apprenticeship?

Skill	%
Regulatory knowledge: private security law and penal code	**61,9%**
Service Orientation	**54,3%**
Occupational health and safety	**51,4%**
People management and communication skills	48,6%
Fire safety	41,0%
Basic IT skills	41,0%
Conflict management/de-escalation	41,0%
Foreign language skills	25,7%
Technical safety (installation, maintenance, diagnosis and repair)	13,3%
I don't know	3,8%

Sample base : 105 cases. The sum of the percentages is greater than 100 because multiple responses were allowed.

Training Plan | Regarding the skills to be developed during specific training/retraining, workers emphasize the importance of acquiring a deeper knowledge of security (60%) and relevant legislation, including elements of criminal law and procedure (52.4%). 49.5% also reported developing personnel management skills.

What skills do you think are important to acquire during specific training/retraining programs?
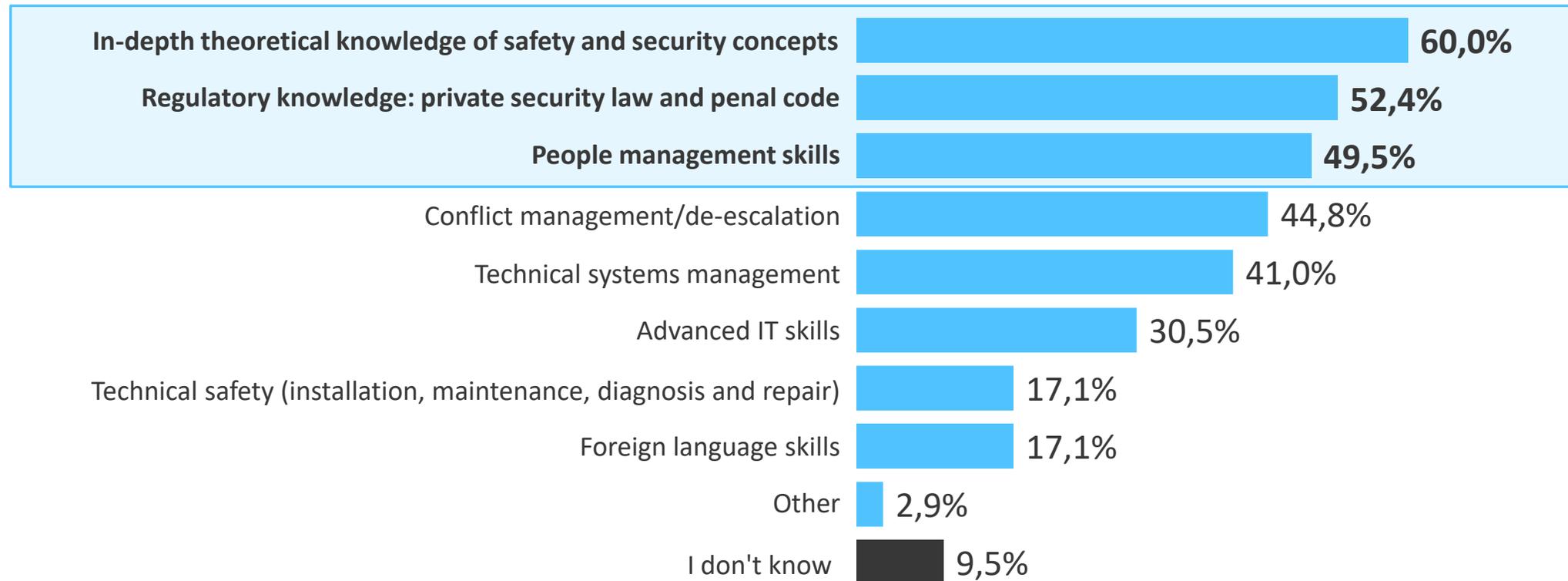
Skill	%
In-depth theoretical knowledge of safety and security concepts	**60,0%**
Regulatory knowledge: private security law and penal code	**52,4%**
People management skills	**49,5%**
Conflict management/de-escalation	44,8%
Technical systems management	41,0%
Advanced IT skills	30,5%
Technical safety (installation, maintenance, diagnosis and repair)	17,1%
Foreign language skills	17,1%
Other	2,9%
I don't know	9,5%

Sample base : 105 cases. The sum of the percentages is greater than 100 because multiple responses were allowed.

Training Plan | 65.8% of the workers interviewed perceive their training as quite or very adequate. This view is especially common among workers holding a professional qualification (57.7%).

On a scale of 1 to 5, do you feel you are receiving adequate digital skills training for your job?

Legend

Not at all adequate	Quite adequate	Very adequate
Vote 1-2	Vote 3	Vote 4-5

65.8% believe they are receiving adequate training on digital skills.

3.8%
I don't know

30.4%
Not at all adequate

28.6%
Quite adequate

37.2%
Very adequate

Mainly:

57.7%
Workers with professional qualification

Sample base : 105 cases.
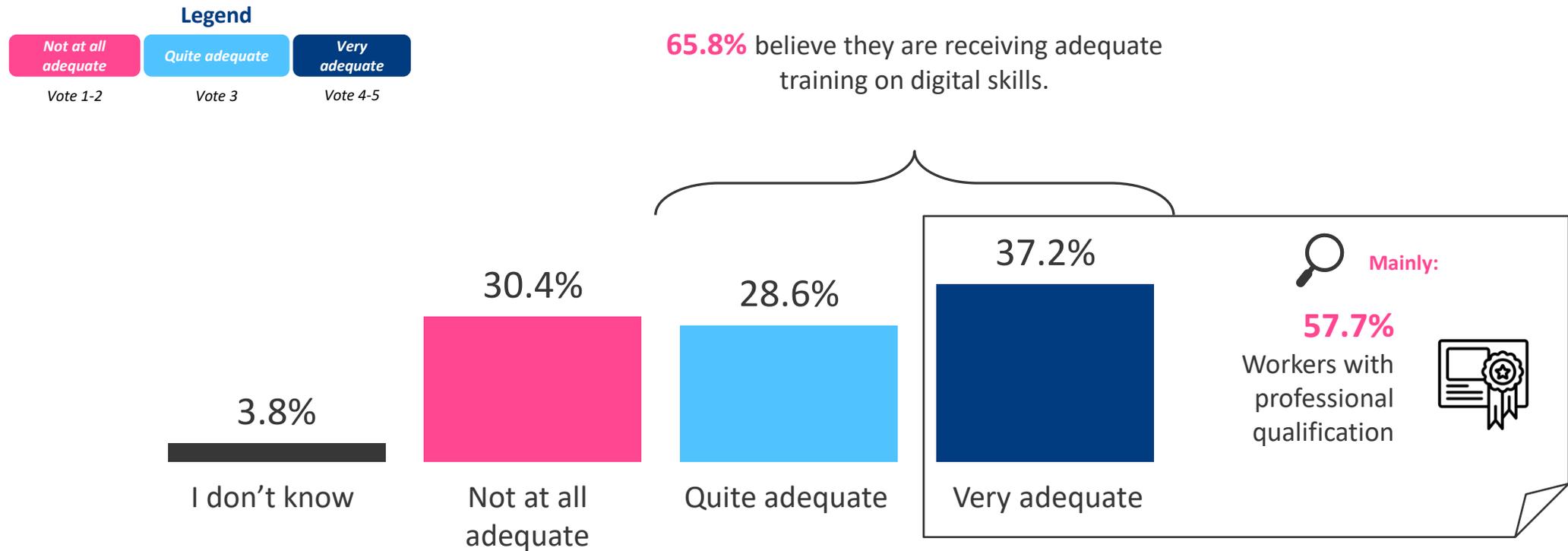
Training Plan | When it comes to soft skills training, workers express a generally positive opinion: 65.8% consider the training they received to be adequate, while 31.5% rate it as very adequate. This perception is shared by 46.1% of workers with a professional qualification (46,1%).

On a scale of 1 to 5, do you feel you receive adequate training in soft skills (e.g., interpersonal skills, communication, conflict management, languages) for your job?

Legend

Not at all adequate	Quite adequate	Very adequate
Vote 1-2	Vote 3	Vote 4-5

65.8% believe they are receiving adequate training on soft skills.

3.8%
I don't know

30.4%
Not at all adequate

34.3%
Quite adequate

31.5%
Very adequate

Mainly:

46,1%
Workers with professional qualification

Sample base : 105 cases.
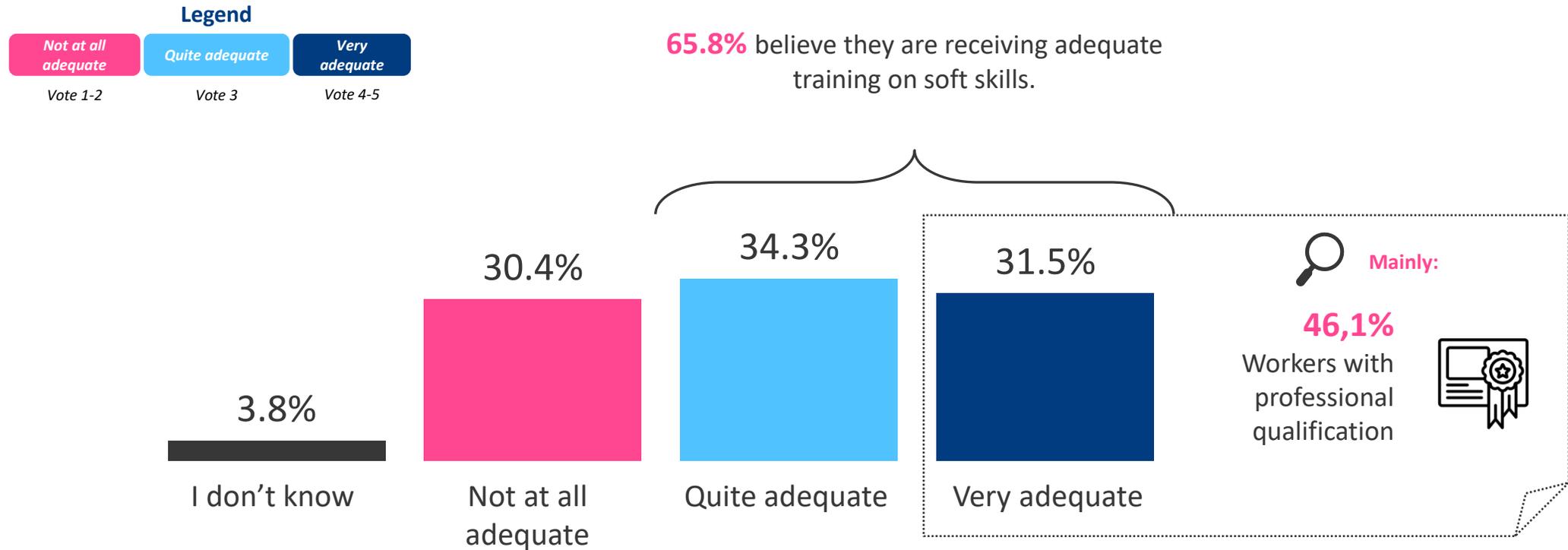
Training Plan | 39.4% of workers believe that improving training and apprenticeships requires changes to the content and type of courses (strengthening modules on cybersecurity or AI). 36.4% suggest investing in delivery methods and operational tools, while 24.2% emphasize the importance of improving the overall structure of training. It is worth noting that only three out of ten interviewed workers gave detailed responses.

How could apprenticeships/studies/vocational training be improved?

39.4 %	36.4 %	24.2 %
Update the content and type of training	Diversify delivery modes and operational tools	Put more care into the structure and organization of training
"Increasing modules on workplace safety and cybersecurity, especially working with artificial intelligence."	*«Provision of training courses on the job»*	*«Periodic organization of coherent and serious training courses»*

Sample base : 33 cases. Only those who specified their answer.

Format research

Digital Learning Methods | According to 51.4% of workers, digital learning paths represent a more appropriate and effective training tool, especially among those with an academic qualification (84.6%).

Do you think digital learning methods could be more efficient and suitable for training?

51.4%
Yes, I believe that digital learning methods can be more efficient and suitable for training.

21.9%
I don't know

26.7%
No, I don't think that digital learning methods can be more efficient and suitable for training.

Mainly:

84.6%
Workers with academic level

Sample base : 105 cases.

Format
research

AGENDA

PRESENTATION OF THE SURVEY

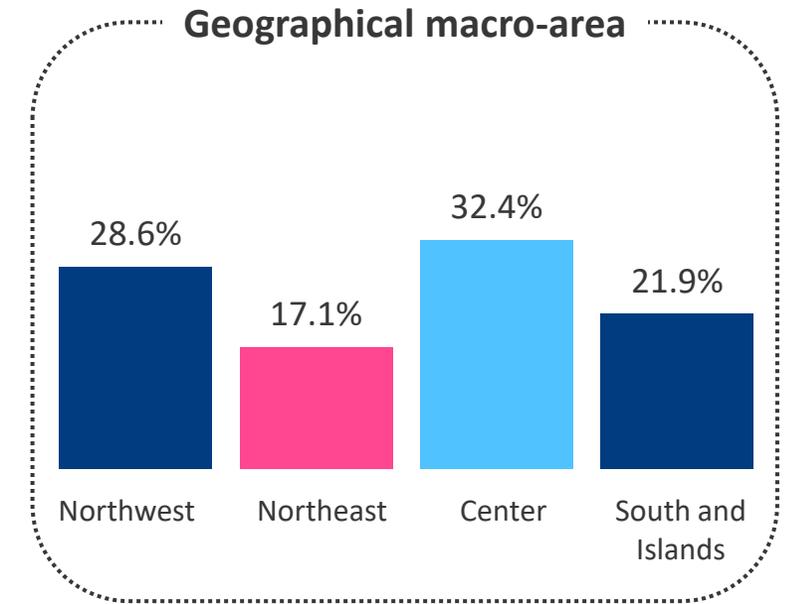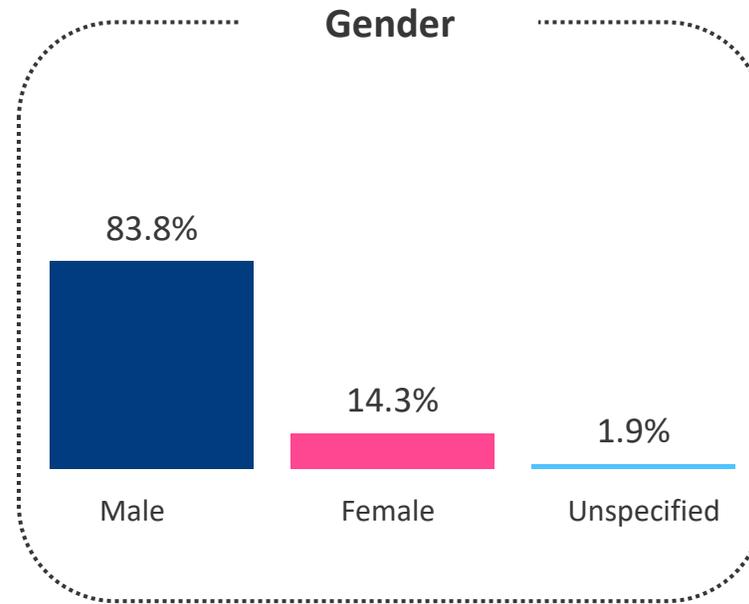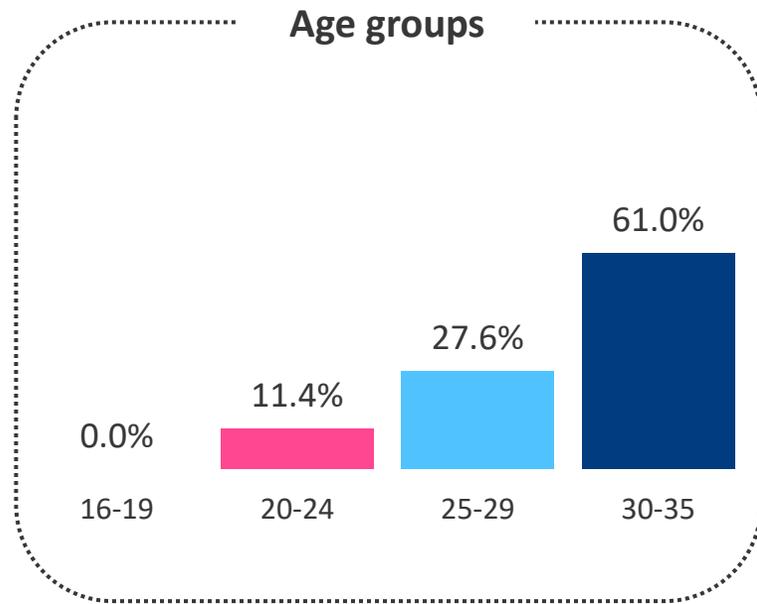MAP OF THE PRIVATE SECURITY SECTOR IN ITALY

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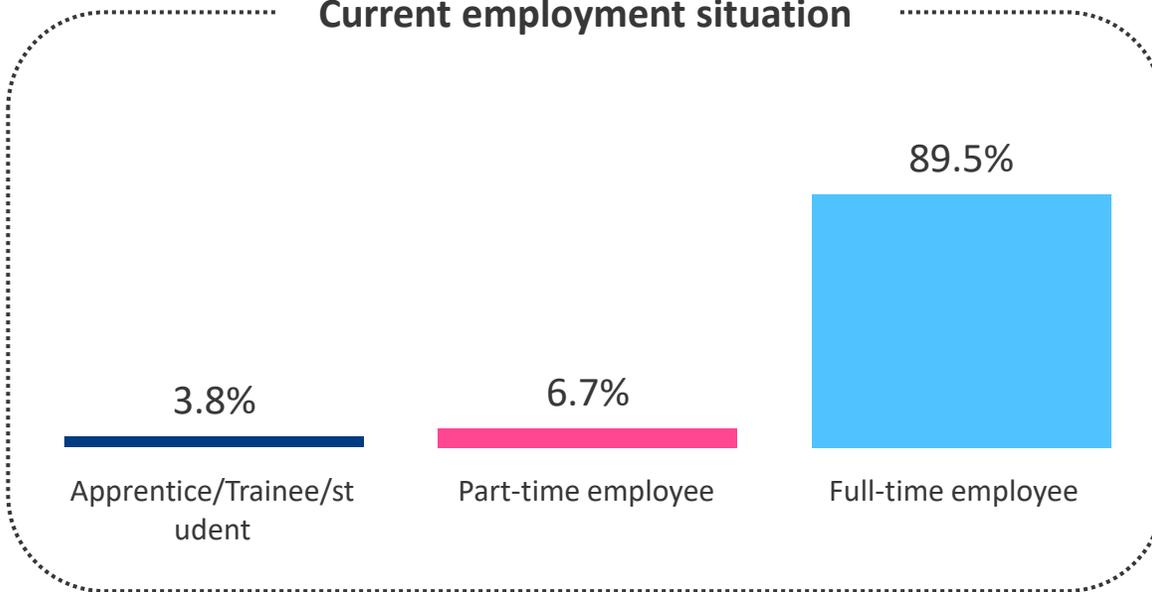- Social dialogue
- Sample characteristics

METHOD

Worker Profile | 86.7% of workers are aware of unions and are familiar with collective bargaining and agreements in the private security sector (73.3%).

Are you aware of the existence of unions in the private security sector?

Are you aware of Collective Bargaining and Collective Agreements in the private security sector?

86.7%
Yes

13.3%
No

73.3%
Yes

26.7%
No

AGENDA

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METHOD

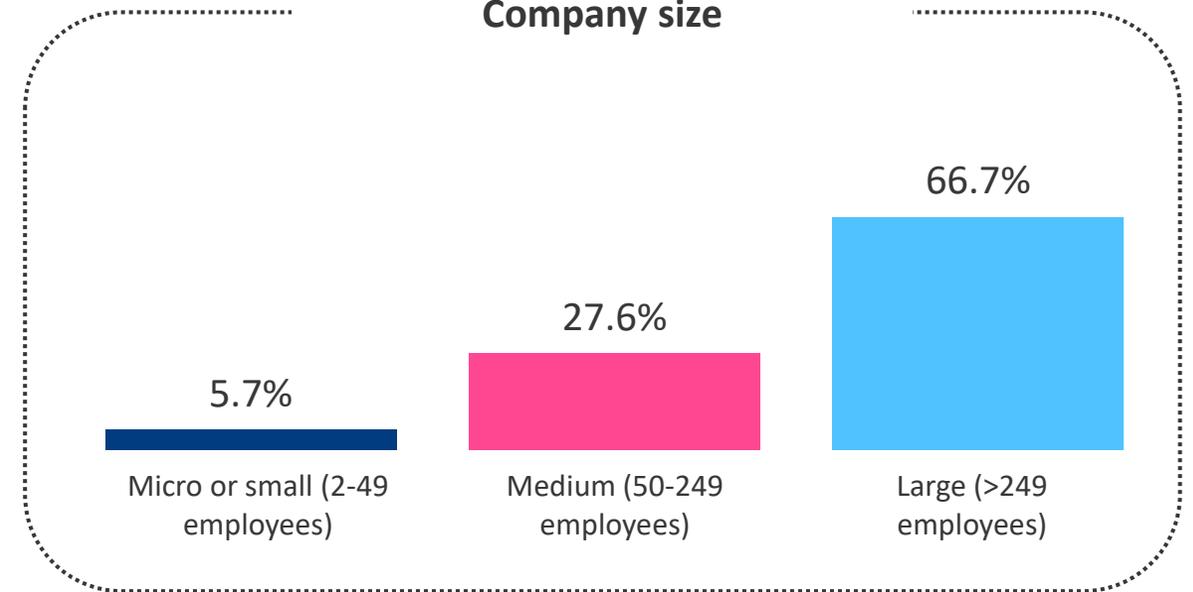# Sample Characteristics | Distribution of respondents by age group, gender, and geographic area of residence.

Age groups

- 16-19: 0.0%
- 20-24: 11.4%
- 25-29: 27.6%
- 30-35: 61.0%

Gender

- Male: 83.8%
- Female: 14.3%
- Unspecified: 1.9%

Geographical macro-area

- Northwest: 28.6%
- Northeast: 17.1%
- Center: 32.4%
- South and Islands: 21.9%

Sample base : 105 cases.

Format research

Sample Characteristics | Distribution of respondents by current employment status and company size.

Current employment situation

3.8%
Apprentice/Trainee/student

6.7%
Part-time employee

89.5%
Full-time employee

Company size

5.7%
Micro or small (2-49 employees)

27.6%
Medium (50-249 employees)

66.7%
Large (>249 employees)

Sample base : 105 cases.

Format
research

Sample Characteristics | Distribution of respondents by years of service in the sector and previous employment status.

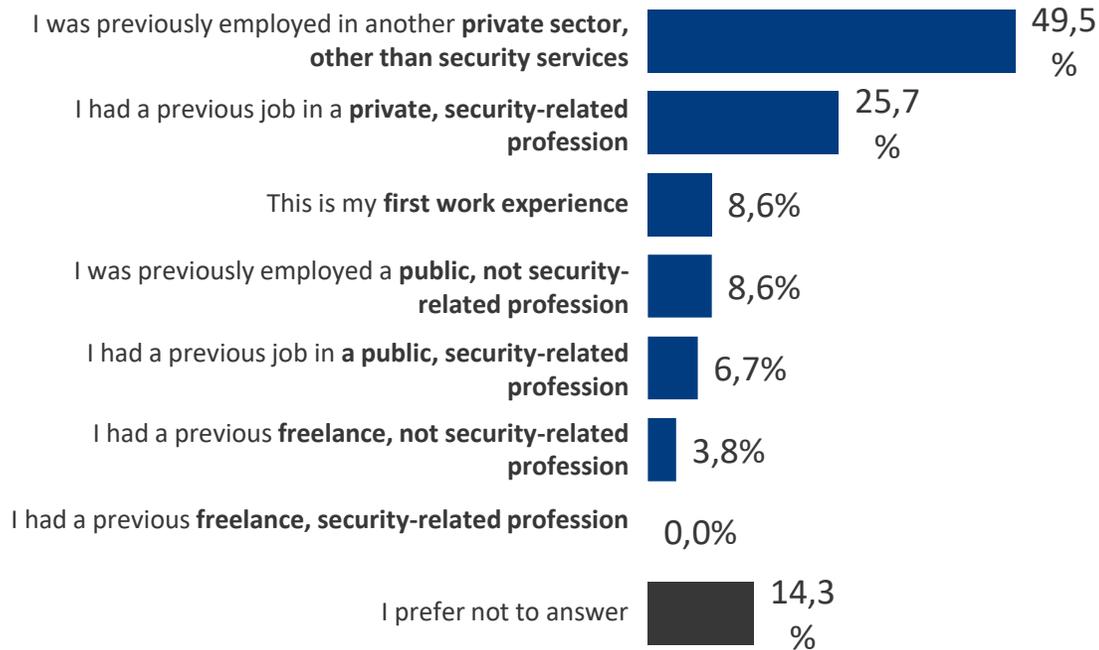How many years have you been working in the private security sector?
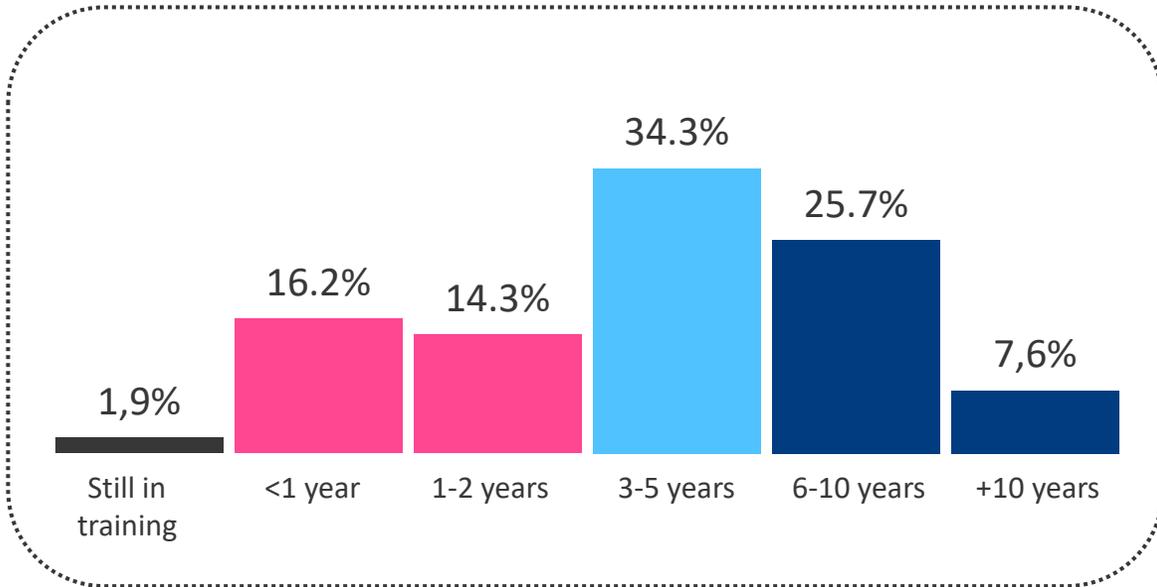
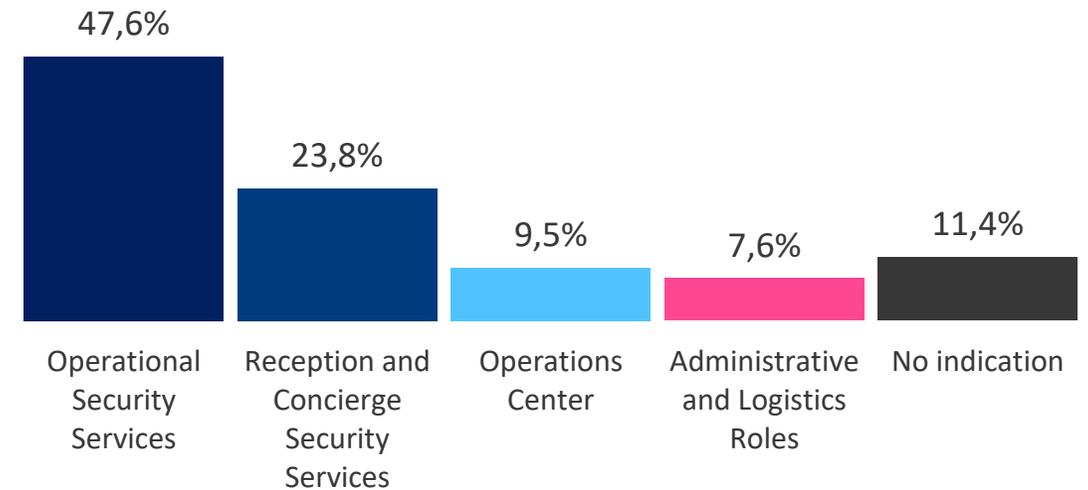What did you do before starting your current job?

1,9%	16.2%	14.3%	34.3%	25.7%	7,6%
Still in training	<1 year	1-2 years	3-5 years	6-10 years	+10 years

16.2%	72.4%	9.5%	1.9%
In education	In employment	Unemployed	I prefer not to answer

Sample base : 105 cases.

Sample base : 105 cases.
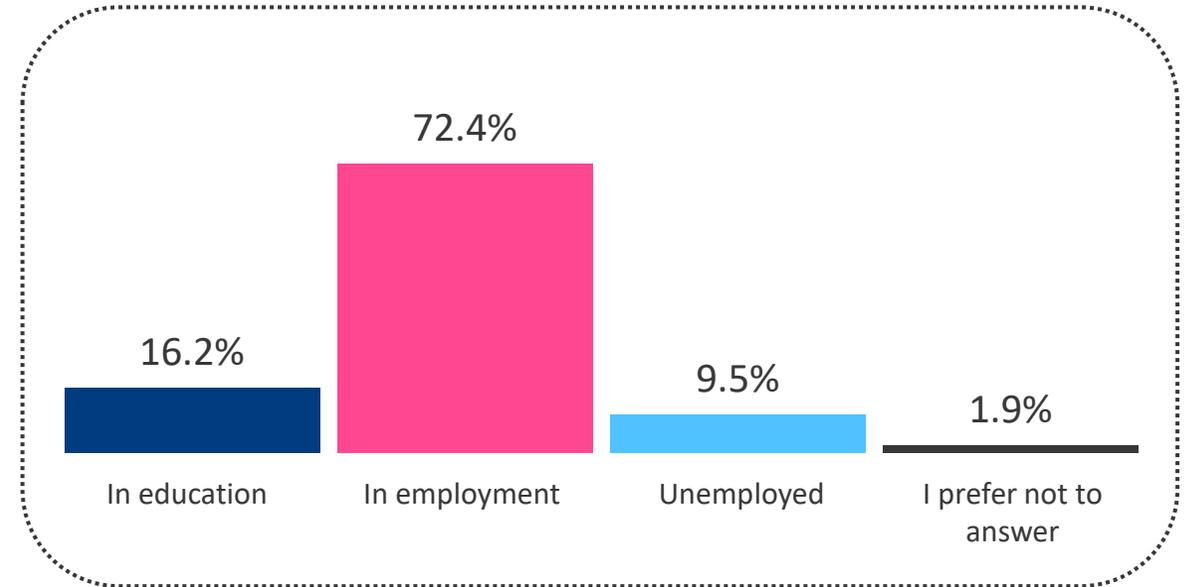
Sample Characteristics | Distribution of respondents by type of previous work experience and current job title.

Can you tell us about your previous work experiences?

I was previously employed in another **private sector, other than security services**	49,5%
I had a previous job in a **private, security-related profession**	25,7%
This is my **first work experience**	8,6%
I was previously employed a **public, not security-related profession**	8,6%
I had a previous job in **a public, security-related profession**	6,7%
I had a previous **freelance, not security-related profession**	3,8%
I had a previous **freelance, security-related profession**	0,0%
I prefer not to answer	14,3%

What is your current position (if not an apprentice) / what tasks have you performed the most in the last 12 months?

Operational Security Services	Reception and Concierge Security Services	Operations Center	Administrative and Logistics Roles	No indication
47,6%	23,8%	9,5%	7,6%	11,4%

Sample size : 105 cases. The sum of the percentages is greater than 100 because multiple responses were allowed.

Sample base : 105 cases.

Format research

Sample Characteristics | Distribution of Respondents by Inclination to Work in Public Security.

Have you ever considered or applied for a public security career (law enforcement, military, etc.)?

1.9%
I don't know

41.0%
Yes

57.1%
No

AGENDA

PRESENTATION OF THE SURVEY

MAP OF THE PRIVATE SECURITY SECTOR IN ITALY

GLOSSARY

WORKERS

- General summary considerations
- Values and motivations in the workplace
- Entering the private security sector and expectations
- Perception of the private security sector and working conditions
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- Perception of training and skills
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METHOD

- For potential workers, stability and economic security are the main priorities. Inflation and the cost of living (49,2%) are their top concerns, followed by safety and crime (43,3%). Job stability (54,1%) and work-life balance (52,1%) guide career choices, while salary and benefits (50,5%) are decisive for both staying in and leaving a job.

- Access to the sector often happens through family ties or word of mouth (52,3%). Expectations are mainly financial (50%), with one in four motivated by professional growth or an interest in safety-related work.

- Perceptions of the sector are largely positive: 56,1% value its contribution to public safety, 55,7% feel public communication is improving, and 53,4% view working conditions as good. Around 55,4% see strong career prospects and job stability, especially among younger respondents.

- Interest in the field is high—62% would consider a career in private security, with a marked preference for cybersecurity (41,8%) and leadership ambitions for more than 80%. Training is seen as adequate by 55,1%, though many call for more modern, accessible programs.

- Overall, potential workers view the sector as stable and promising, but its appeal will depend on fairer pay, stronger career pathways, and updated training opportunities.

AGENDA

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GLOSSARY

WORKERS

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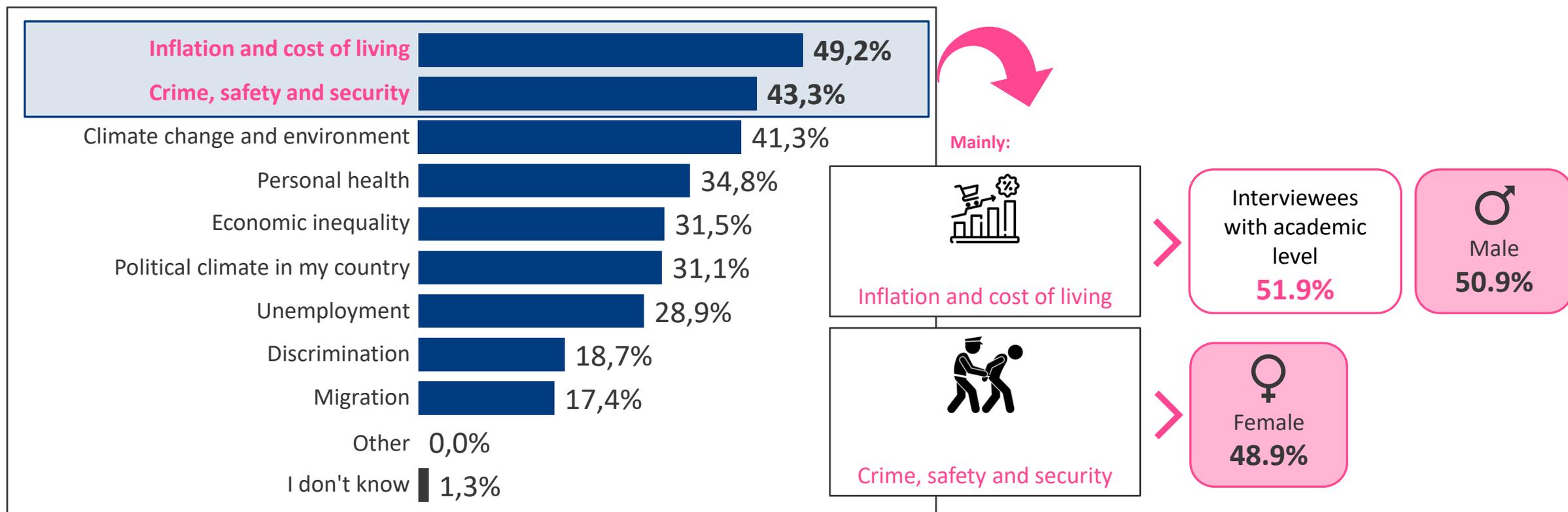- Social dialogue
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POTENTIAL WORKERS

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METHOD

Personal concerns of "potential workers" | The main personal concerns of this group are inflation and the cost of living, cited by 49.2% of respondents, especially among men and those with a high level of education. At 43.3%, concerns related to crime, safety, and security emerge, with women reporting them more.
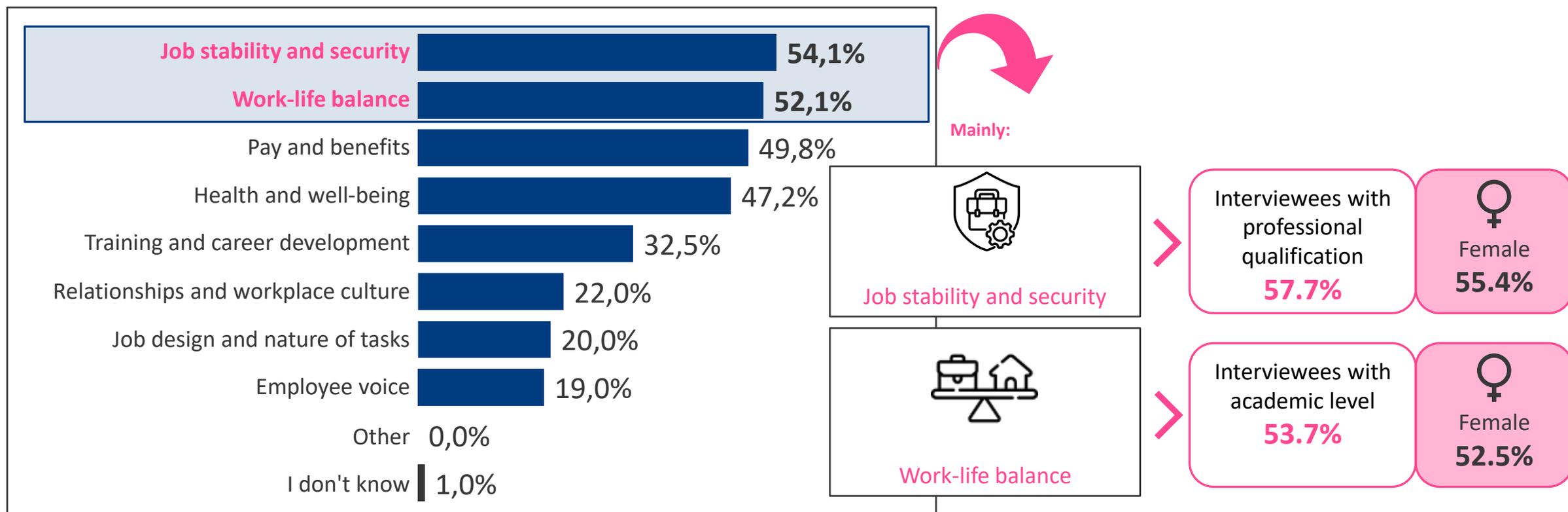
Select the personal concerns that are most important to you today:

Concern	%
Inflation and cost of living	**49,2%**
Crime, safety and security	**43,3%**
Climate change and environment	41,3%
Personal health	34,8%
Economic inequality	31,5%
Political climate in my country	31,1%
Unemployment	28,9%
Discrimination	18,7%
Migration	17,4%
Other	0,0%
I don't know	1,3%

Mainly:

Inflation and cost of living

Crime, safety and security

> Interviewees with academic level **51.9%**

Male **50.9%**

> Female **48.9%**

Sample base : 305 cases. The sum of the percentages is greater than 100 because multiple responses were allowed.

Drivers of Job Choice | The most important decisions in favour of a job by "potential workers" are, on the one hand, job stability and security (54.1%) and, on the other, work-life balance (52.1%). In both categories, these priorities emerge especially among female respondents. Job stability is perceived as fundamental primarily by vocational students and female respondents.
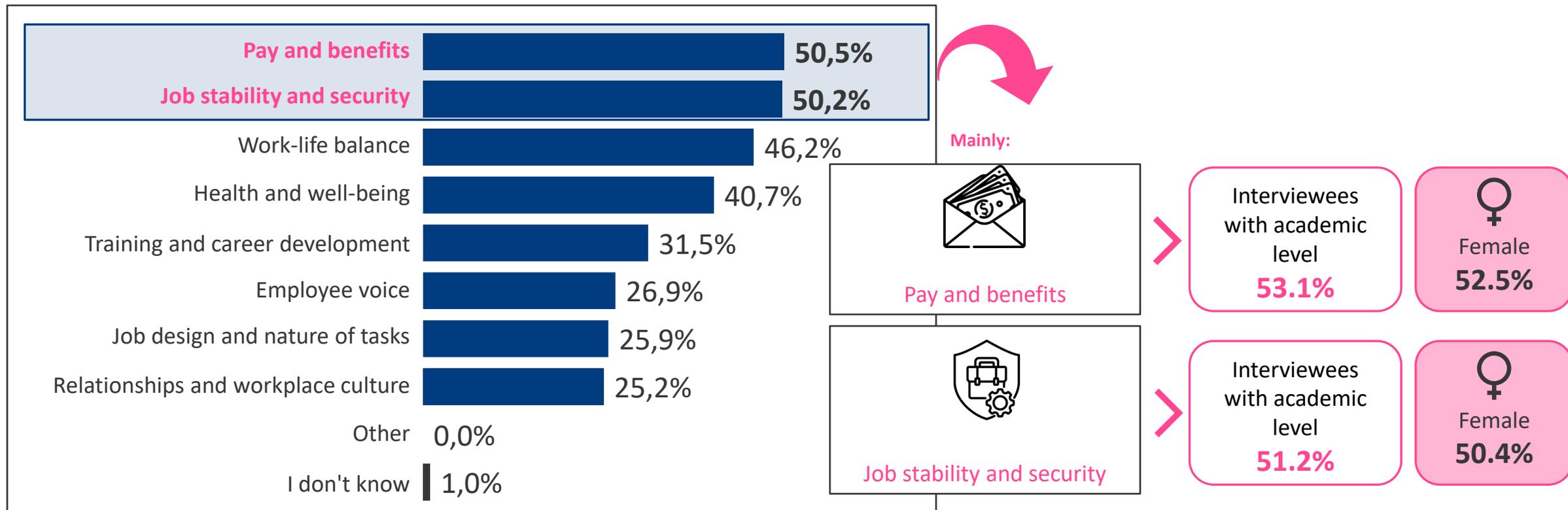
Imagine choosing a new job: what factors would be most important to you?

Factor	%
Job stability and security	**54,1%**
Work-life balance	**52,1%**
Pay and benefits	49,8%
Health and well-being	47,2%
Training and career development	32,5%
Relationships and workplace culture	22,0%
Job design and nature of tasks	20,0%
Employee voice	19,0%
Other	0,0%
I don't know	1,0%

Mainly:

Job stability and security

> Interviewees with professional qualification **57.7%**

♀ Female **55.4%**

Work-life balance

> Interviewees with academic level **53.7%**

♀ Female **52.5%**

Sample base : 305 cases. The sum of the percentages is greater than 100 because multiple responses were allowed.

Drivers of Job Retention | Among the drivers of job retention, "potential workers" prioritize the salary and benefit system (50.5%) and job stability and security (50.2%). In both cases, these priorities emerge particularly among female students and respondents with an academic background.
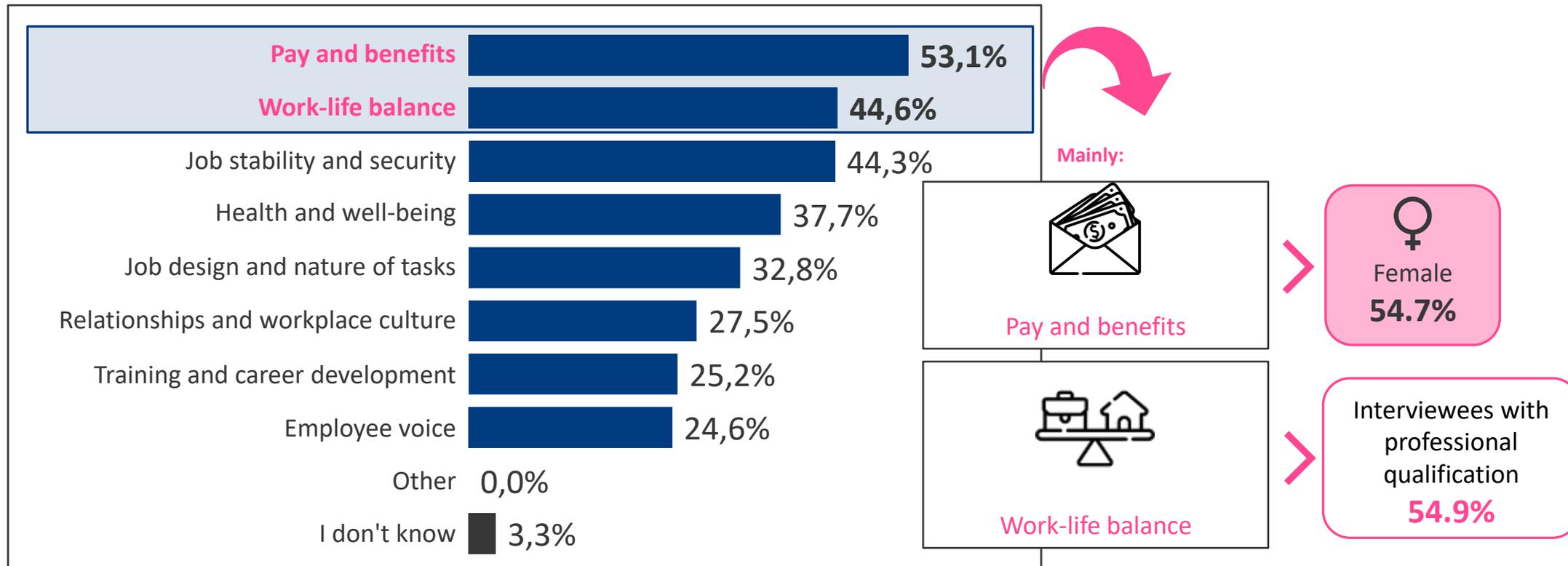
What are the main aspects that would make you stay in a job?

Pay and benefits	**50,5%**
Job stability and security	**50,2%**
Work-life balance	46,2%
Health and well-being	40,7%
Training and career development	31,5%
Employee voice	26,9%
Job design and nature of tasks	25,9%
Relationships and workplace culture	25,2%
Other	0,0%
I don't know	1,0%

Mainly:

Pay and benefits

> Interviewees with academic level **53.1%**

> ♀ Female **52.5%**

Job stability and security

> Interviewees with academic level **51.2%**

> ♀ Female **50.4%**

Sample base : 305 cases. The sum of the percentages is greater than 100 because multiple responses were allowed.

Drivers of Job Leaving | 53.1% of potential employees stated they would leave the company primarily for reasons related to pay and benefits, a finding particularly significant among female respondents. 44.6% cited work-life imbalance as a reason for leaving, a factor cited primarily by those who had undertaken professional training.

What would be the main reasons why you would leave a job?

Pay and benefits	**53,1%**
Work-life balance	**44,6%**
Job stability and security	44,3%
Health and well-being	37,7%
Job design and nature of tasks	32,8%
Relationships and workplace culture	27,5%
Training and career development	25,2%
Employee voice	24,6%
Other	0,0%
I don't know	3,3%

Mainly:

Pay and benefits

Female **54.7%**

Work-life balance

Interviewees with professional qualification **54.9%**

Sample base : 305 cases. The sum of the percentages is greater than 100 because multiple responses were allowed.

AGENDA

PRESENTATION OF THE SURVEY

MAP OF THE PRIVATE SECURITY SECTOR IN ITALY

GLOSSARY

WORKERS

- General summary considerations
- Values and motivations in the workplace
- Entering the private security sector and expectations
- Perception of the private security sector and working conditions
- Perception of professional development and career prospects
- Perception of training and skills
- Social dialogue
- Sample characteristics

POTENTIAL WORKERS

- General summary considerations
- Values and motivations in the workplace
- Entering the private security sector and expectations
- Perception of the private security sector and working conditions
- Perception of professional development and career prospects
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- Social dialogue
- Sample characteristics

METHOD

Family experience in the security sector | 43.3% of "potential workers" reported having relatives or acquaintances with work experience in the sector; the majority were male and those interviewed had a professional qualification.

Have any of your relatives or acquaintances ever worked in the private or public security sector before you entered the private security sector?
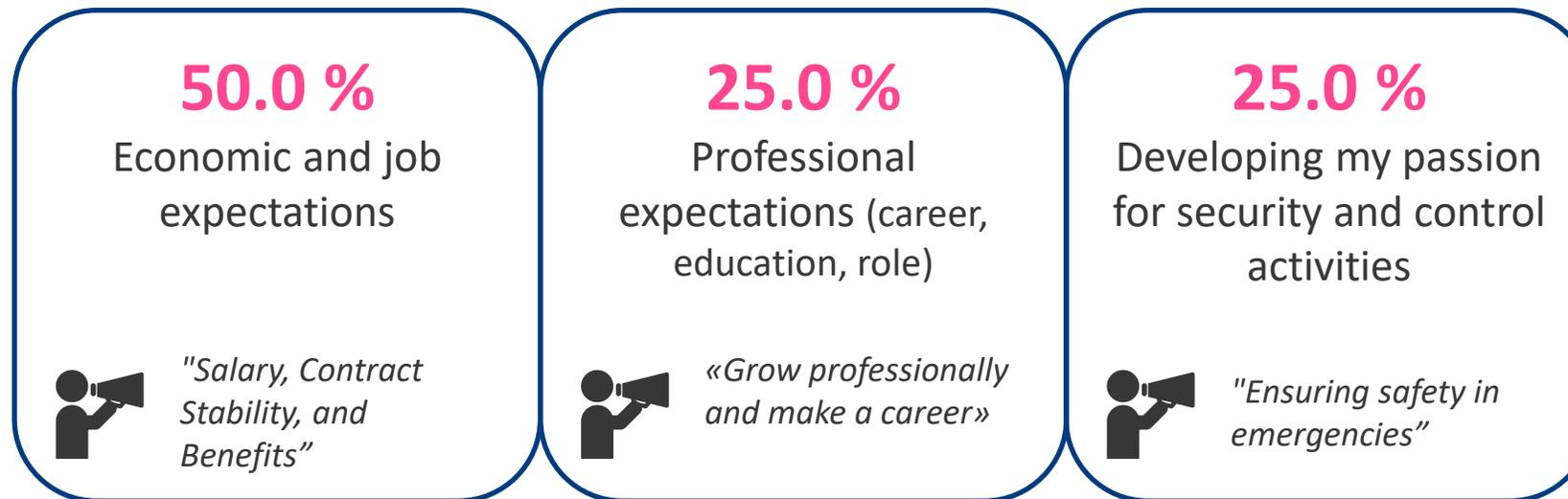
43.3%

Yes, my relatives or acquaintances have worked in the security sector

56.7%

No, my relatives or acquaintances have never worked in the security sector

Mainly:

Interviewees with professional qualification
47.8%

Male
47.3%
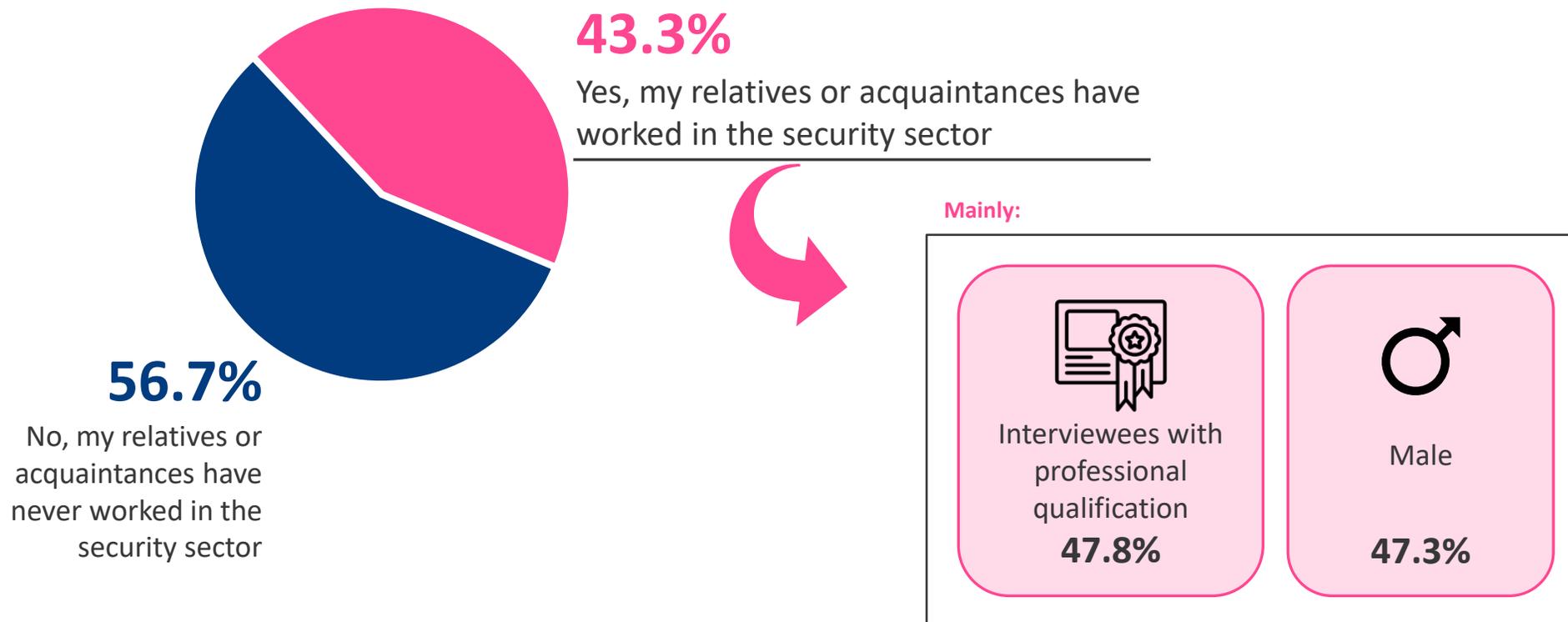
Sample base : 305 cases.

Previous experience and industry knowledge | 13.8% of "potential workers" report having previously worked in the private security sector (seasonally or part-time). Of these, 52.3% learned about the sector through personal contacts and word of mouth. The percentage referring to public employment services and social media campaigns is rather low (4.8%), indicating that these channels should be strengthened.

Have you ever worked in the private security industry (part-time, temporary, seasonal)? If so, how did you learn about it?

13.8%
Yes, part-time, temporary, seasonal

86.2%
No, I have never worked in the private security sector

0%
Yes, consistently

Private contact and word of mouth	52,3%
Job offer at online portal	23,8%
Raised interest thanks to witnessing work of security officers in public	19,1%
Job offer at company website	12,0%
Public employment service	4,8%
Social media campaign	4,8%
Private employment service	2,4%
Another corporate campaign	2,3%
Presentation of the sector at school	0,0%
Other	0,0%
I don't remember	0,0%

Sample base : 305 cases.

Sample base : 42 cases. Only those who had previously worked in the private security sector.

Job Expectations | Even among "potential workers," expectations are primarily financial and job-related (50%), followed by those related to professional development and the opportunity to cultivate an interest in security and control-related activities (both 25%).

Before starting to work in the sector, what were your main expectations about working in the security services?

50.0 %	**25.0 %**	**25.0 %**
Economic and job expectations	Professional expectations (career, education, role)	Developing my passion for security and control activities
"Salary, Contract Stability, and Benefits"	*«Grow professionally and make a career»*	*"Ensuring safety in emergencies"*

Sample base : 21 cases. Only those who specified their answer. Values re-percented net of "no particular expectations" (4.9%).

AGENDA

PRESENTATION OF THE SURVEY

MAP OF THE PRIVATE SECURITY SECTOR IN ITALY

GLOSSARY

WORKERS

- General summary considerations
- Values and motivations in the workplace
- Entering the private security sector and expectations
- Perception of the private security sector and working conditions
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- Perception of training and skills
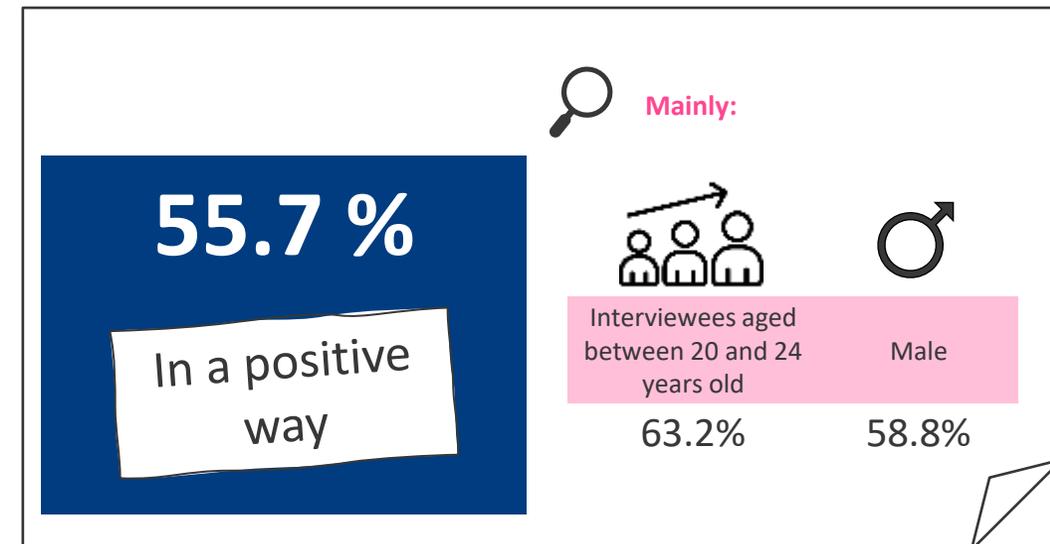- Social dialogue
- Sample characteristics

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METHOD

Evaluation of the contribution of security services | 56.1% of "potential workers" expressed a positive opinion of the role of private security services in strengthening public security. This perception was particularly widespread among those with an academic background (61.7%).

On a scale of 1 to 5, how would you rate the contribution of private security services to public security?
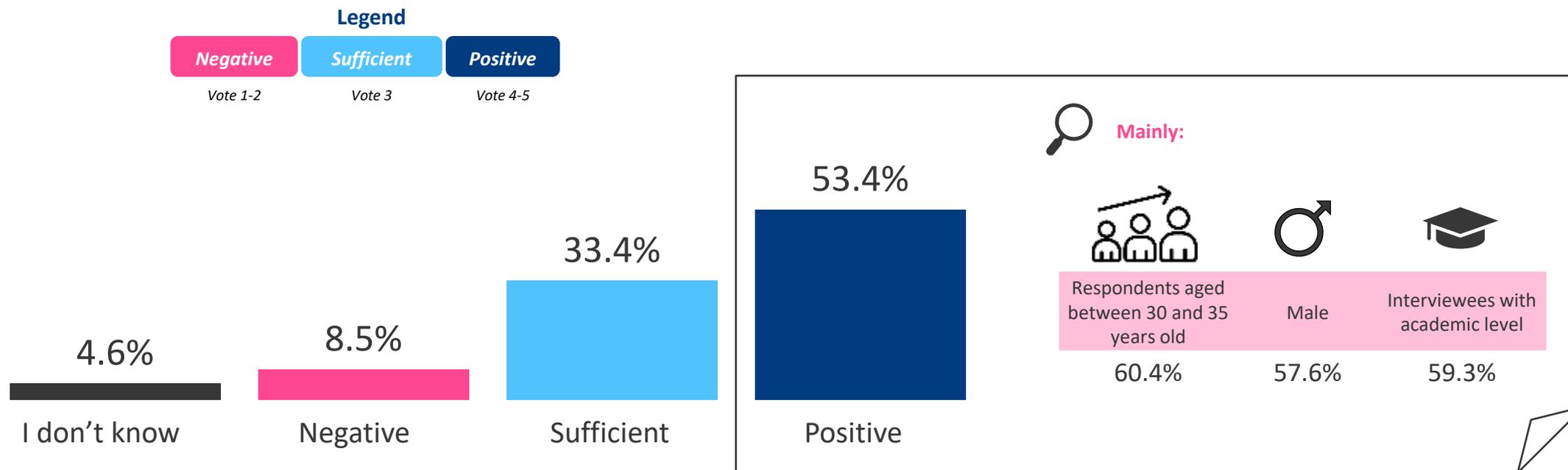
Legend

Negative	Sufficient	Positive
Vote 1-2	Vote 3	Vote 4-5

56.1%

Mainly:

Interviewees with academic level

61.7%

34.8%

2.6%

6.6%

I don't know

Negative

Sufficient

Positive

Sample base : 305 cases.
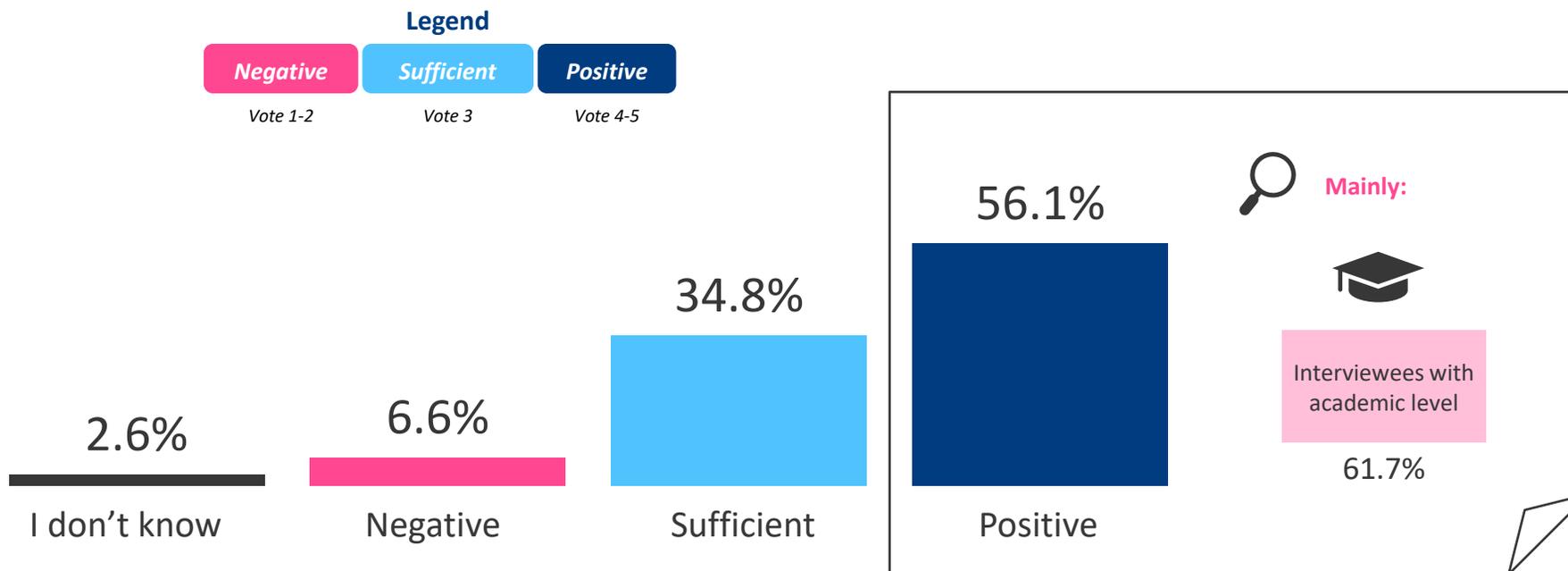
Communication of the public debate | 55.7% of "potential workers" believe that the public debate positively conveys the value of private security services for collective security. This favorable assessment comes primarily from young people between the ages of 20 and 24 and from male respondents.

How do you think public debate communicates the value of private security services for public safety?

19.0%

I don't know

25.2%

In a negative way

55.7 %

In a positive way

Mainly:

Interviewees aged between 20 and 24 years old

Male

63.2%

58.8%

Sample base : 305 cases.

Format
research

Perception of working conditions | 53.4% of "potential workers" have a positive perception of working conditions in the sector. Specifically, positive opinions are expressed primarily by respondents between 30 and 35 and by those who have undertaken an academic career. Only 8.5% of respondents have a negative perception of the conditions offered by the sector.

On a scale of 1 to 5, how do you perceive working conditions in the sector?

Legend

Negative	Sufficient	Positive
Vote 1-2	Vote 3	Vote 4-5

4.6% — I don't know

8.5% — Negative

33.4% — Sufficient

53.4% — Positive

Mainly:

Respondents aged between 30 and 35 years old	Male	Interviewees with academic level
60.4%	57.6%	59.3%

Sample base : 305 cases.

Format research

Career Development Opportunities | Career development opportunities in the sector are perceived positively by 54.8% of respondents. This opinion is expressed particularly strongly by young people between the ages of 16 and 19 and those with professional qualifications. Only 8.9% of respondents have a negative perception of development opportunities in the sector.

On a scale of 1 to 5, how do you perceive the professional development opportunities in the industry?

Legend

Negative	Sufficient	Positive
Vote 1-2	Vote 3	Vote 4-5

4.3% I don't know

8.9% Negative

32.1% Sufficient

54.8% Positive

Mainly:

Interviewees aged between 16 and 19	Interviewees with professional qualification
61.5%	62.0%

Sample base : 305 cases.
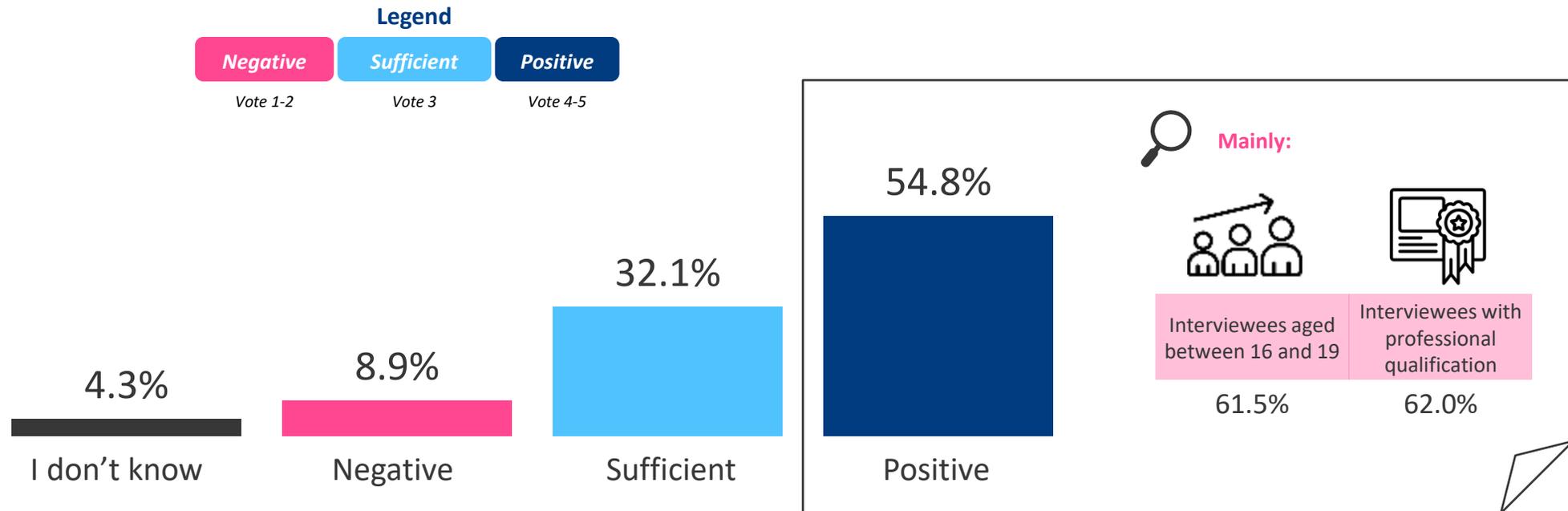
Job stability and security | Job stability and security are perceived positively by 55.4% of respondents in the "potential workers" group. This favorable perception is particularly widespread among young people aged between 16 and 19 (69.2%) and among male respondents (58.8%).

On a scale of 1 to 5, how do you perceive job stability and security in the industry?

Legend

Negative	Sufficient	Positive
Vote 1-2	Vote 3	Vote 4-5

Mainly:

55.4%

30.5%

11.5%

2.6%

I don't know   Negative   Sufficient   Positive

Interviewees aged between 16 and 19	Male
69.2%	58.8%

AGENDA

PRESENTATION OF THE SURVEY

MAP OF THE PRIVATE SECURITY SECTOR IN ITALY

GLOSSARY

WORKERS

- General summary considerations
- Values and motivations in the workplace
- Entering the private security sector and expectations
- Perception of the private security sector and working conditions
- Perception of professional development and career prospects
- Perception of training and skills
- Social dialogue
- Sample characteristics

POTENTIAL WORKERS

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METHOD

Drivers of development | 62% of "potential workers" say they are interested in pursuing a career in the private security sector. This path is particularly attractive to respondents between the ages of 25 and 29 (65.9%), males (66.7%), and those with an academic background (64.8%).

Would you be interested in pursuing a career in the private security services sector?

62.0%
Yes

14.1%
I don't know

23.9%
No

Mainly:

Interviewees aged between 25 and 29	Male	Interviewees with academic level
65.9%	66.7%	64.8%

Sample base : 305 cases.

Format
research

Career Preferences | Of the 62% of respondents interested in a career in the sector, 41.8% expressed a preference for cybersecurity. This preference was particularly prevalent among young people between the ages of 20 and 24 (45.7%), women (44.3%), and those with an academic background (49.5%).

What private security services jobs would you be most interested in in the future?

For the record:

62% of "potential workers" would be interested in a career in the private security sector

Job	%
Cybersecurity	**41,8%**
Data analytics	32,3%
Consultancy	21,7%
Guarding with innovative security solutions	21,2%
Monitoring and Alarm Receiving Centres	21,2%
Aviation security	20,6%
Event Security	20,6%
Mobile guarding	19,6%
Safety devices installation	16,4%
Static guarding	14,8%
Maritime security	14,8%
Critical Infrastructure Protection	14,3%
Alarm Response	10,6%
Other	0,0%
I don't know	0,0%
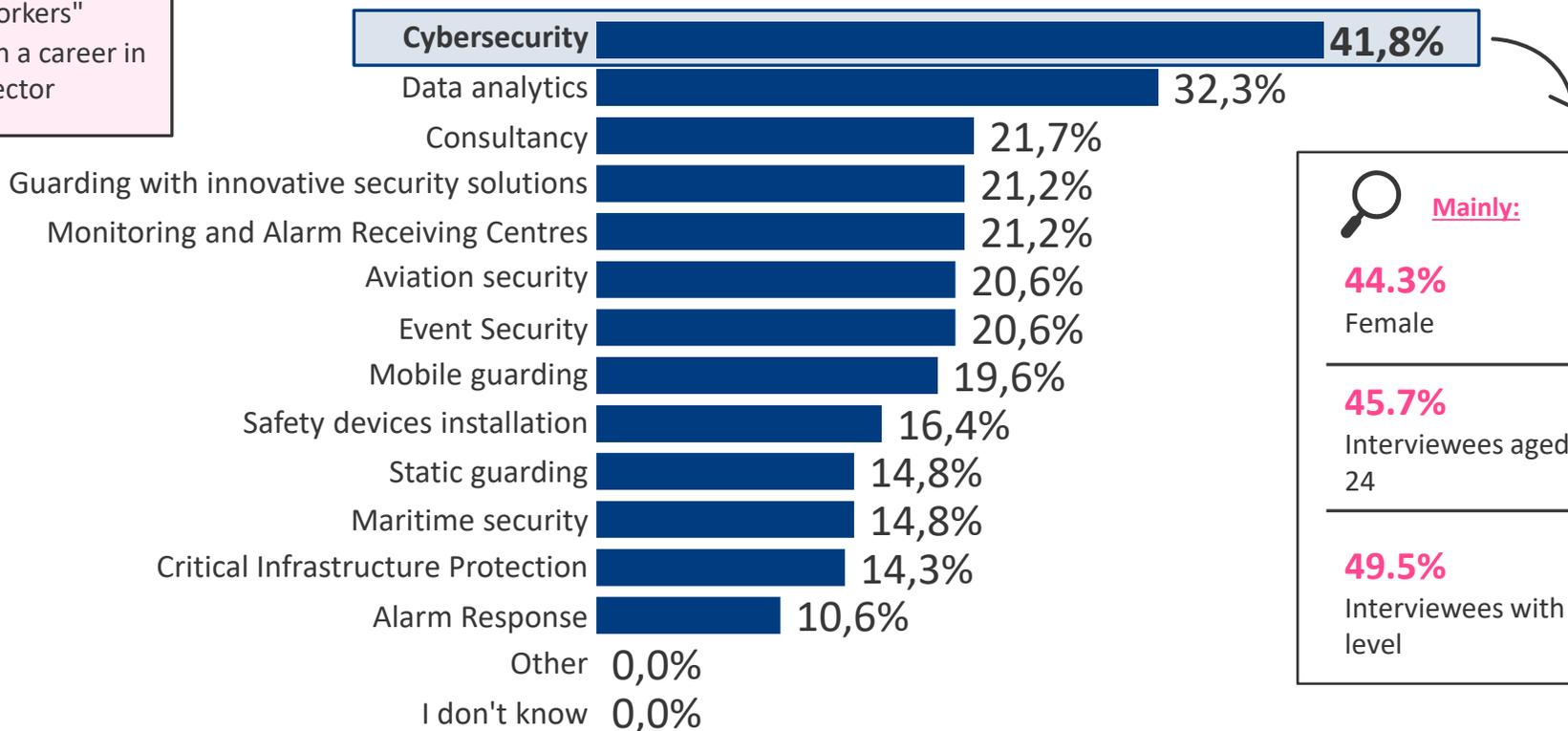
Mainly:

44.3%
Female

45.7%
Interviewees aged between 20 and 24

49.5%
Interviewees with academic level

Sample base : 189 cases. Only those intending to pursue a career in the private security services sector . The sum of the percentages is greater than 100 because multiple responses were allowed.

Format research

Leadership Roles | More than eight in ten "potential workers" aspire to hold a leadership position in the future. Among the most desired roles, 33.5% cite security management, while 27.7% are leaning toward positions in IT and innovation-related activities.

Would you like to hold a leadership role in your company in the future? If so, what type of leadership role would you like?

82.0%
Yes, I would like to take on a leadership role.

14.8%
No, I wouldn't like to be in a leadership role.

3.2 %
I don't know

Security Manager	33,5%
IT and innovation	27,7%
Firstline supervisor	20%
Consultancy	19,4%
HR / Personnel Management	18,7%
Business analytics	18,7%
Regional Director	17,4%
Branch Manager	16,8%
Business Development	12,3%
Other	0,0%

Format research

AGENDA

PRESENTATION OF THE SURVEY

MAP OF THE PRIVATE SECURITY SECTOR IN ITALY

GLOSSARY

WORKERS

- General summary considerations
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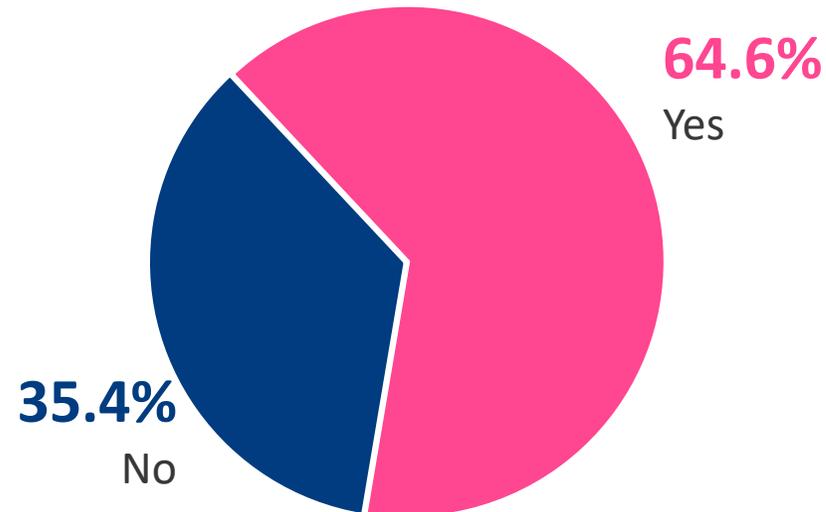- Sample characteristics

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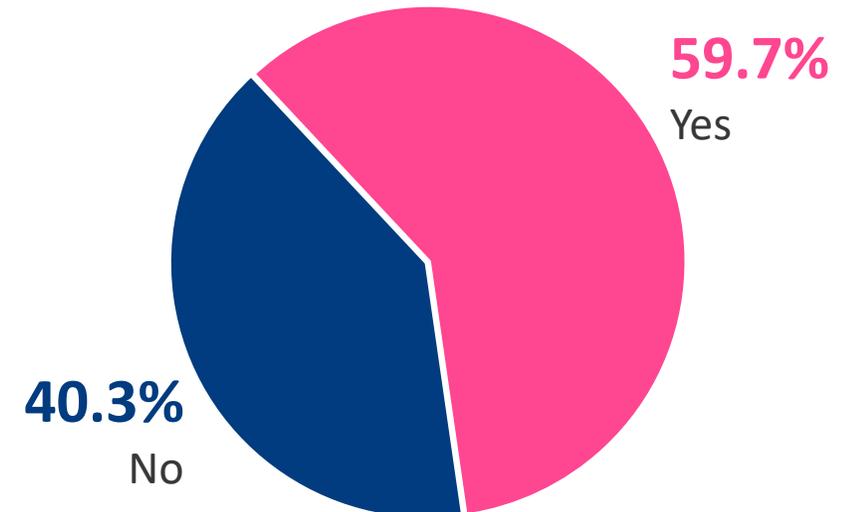- Social dialogue
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METHOD

Training Plan | 55.1% of respondents in the "potential workers" group considered their training program adequate for launching a career in the private security sector , 34.1% believed it was not, and 10.8% were unable to assess it.

Regardless of the profession you intend to pursue, do you feel that the program you are undertaking is sufficient to prepare you for a career in the private security sector?

10.8%
I don't know

55.1%
Yes, I think the study program is sufficient to carry out the profession.

34.1%
No, I don't think the study program is sufficient to carry out the profession.

Sample base : 305 cases.

Format
research
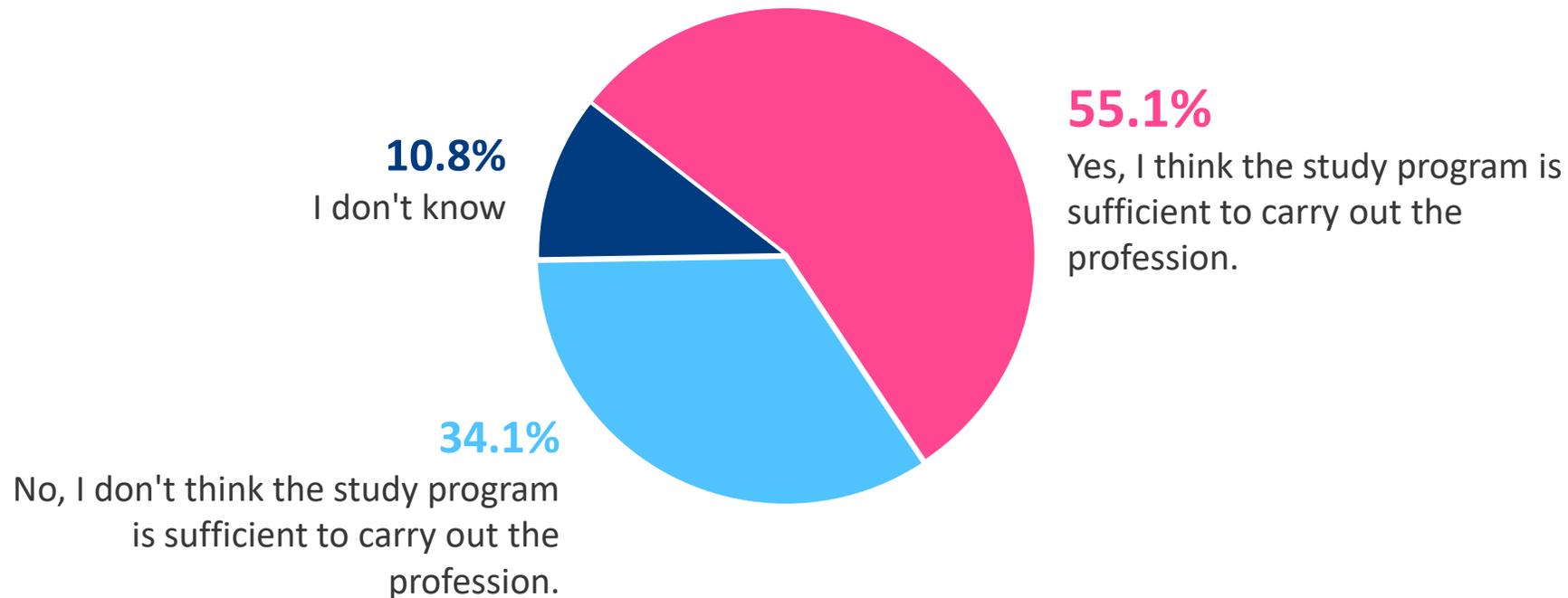
Training Plan | Most of the "potential workers" group (54.8%) believe that training programs should be encouraged to improve training and apprenticeships; 17.9%, however, support improving pay and financial incentives, while 14.3% express the need to make training more equitable.

How could apprenticeships/studies/vocational training be improved?

54.8 %

Giving fair pay and economic incentives to participants

"More training courses and training internships"

17.9 %

Making education more accessible, high-quality and equal

"Making students earn something"

27.4 %

No indication

Sample base : 84 cases. Only those who specified their answer.

AGENDA

PRESENTATION OF THE SURVEY

MAP OF THE PRIVATE SECURITY SECTOR IN ITALY
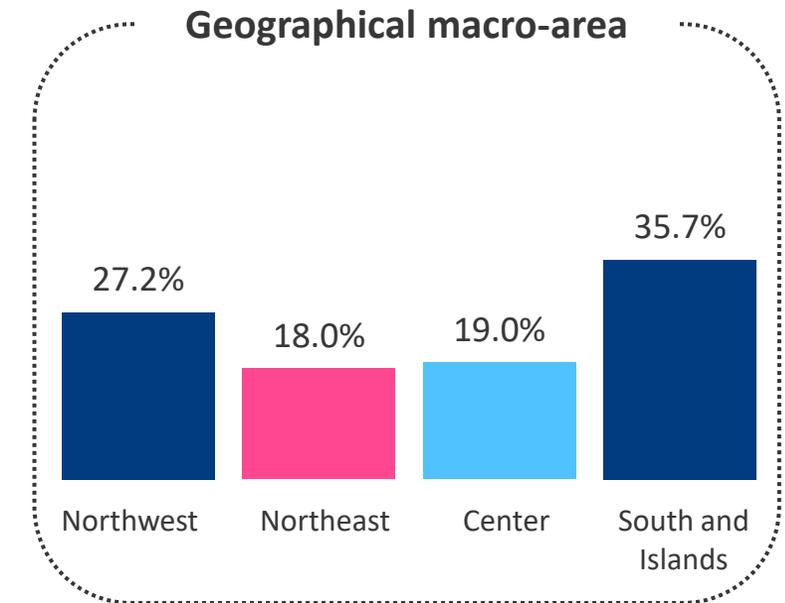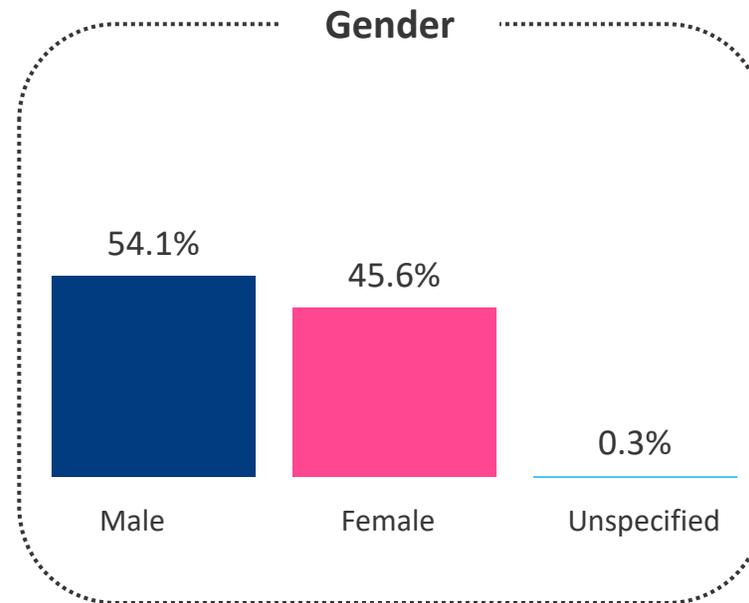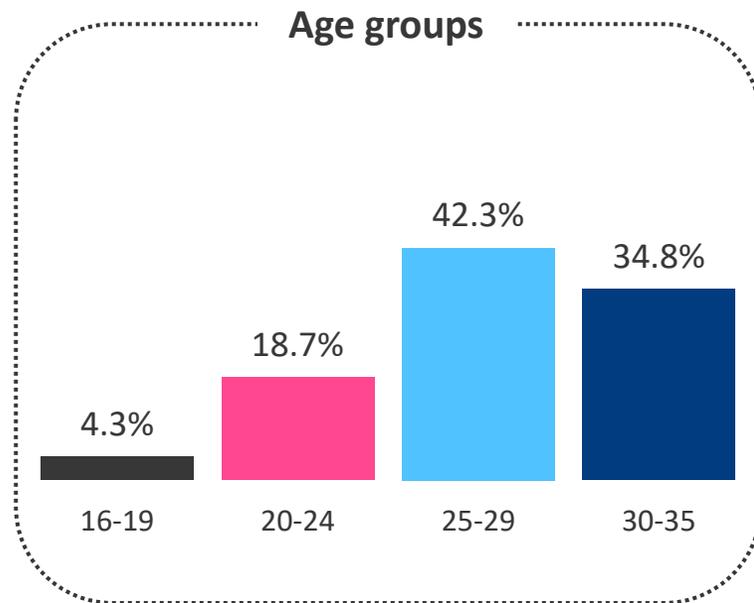
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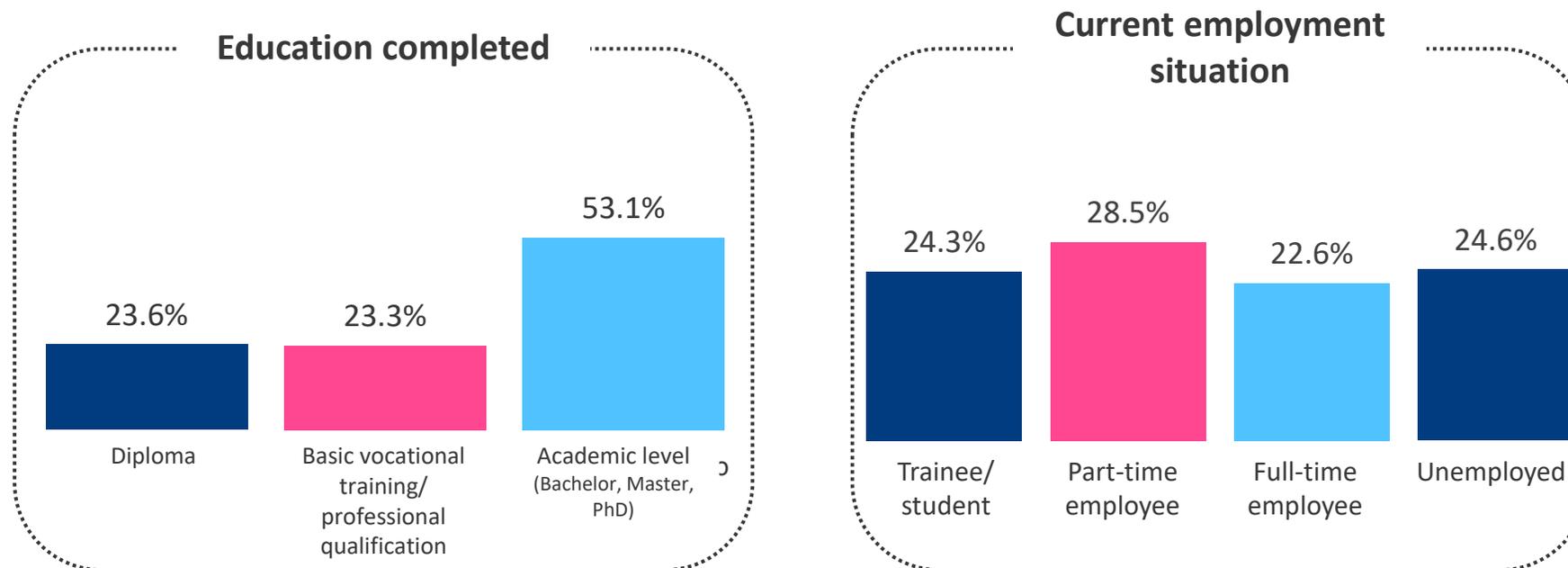- Sample characteristics

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METHOD

Student Profile | 64.6% of "potential workers" are familiar with the trade unions in the sector and 59.7% are aware of Collective Bargaining and Collective Agreements in the private security sector.

Are you aware of the existence of unions in the private security sector?

Are you aware of Collective Bargaining and Collective Agreements in the private security sector?

64.6%
Yes

35.4%
No

59.7%
Yes

40.3%
No

Sample base : 305 cases.

Sample base : 305 cases.

AGENDA

PRESENTATION OF THE SURVEY

MAP OF THE PRIVATE SECURITY SECTOR IN ITALY

GLOSSARY

WORKERS

- General summary considerations
- Values and motivations in the workplace
- Entering the private security sector and expectations
- Perception of the private security sector and working conditions
- Perception of professional development and career prospects
- Perception of training and skills
- Social dialogue
- Sample characteristics

POTENTIAL WORKERS

- General summary considerations
- Values and motivations in the workplace
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METHOD

Sample Characteristics | Distribution of respondents by age group, gender, and geographic area of residence.

Age groups

- 16-19: 4.3%
- 20-24: 18.7%
- 25-29: 42.3%
- 30-35: 34.8%

Gender

- Male: 54.1%
- Female: 45.6%
- Unspecified: 0.3%

Geographical macro-area

- Northwest: 27.2%
- Northeast: 18.0%
- Center: 19.0%
- South and Islands: 35.7%

Sample base : 305 cases.

Format research

Sample Characteristics | Distribution of Respondents by Educational Level and Employment Status .

Education completed

- Diploma: 23.6%
- Basic vocational training/ professional qualification: 23.3%
- Academic level (Bachelor, Master, PhD): 53.1%

Current employment situation

- Trainee/ student: 24.3%
- Part-time employee: 28.5%
- Full-time employee: 22.6%
- Unemployed: 24.6%

Sample base : 305 cases.

AGENDA

PRESENTATION OF THE SURVEY

MAP OF THE PRIVATE SECURITY SECTOR IN ITALY

GLOSSARY

WORKERS

- General summary considerations
- Values and motivations in the workplace
- Entering the private security sector and expectations
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METHOD

CLIENT
CoESS – Confederation of European Security Services

AUTHOR
Format Research Srl (www.formatresearch.com)

WORK OBJECTIVES
Study among workers (<35) in the private security sector on the attractiveness of the sector.

SAMPLE DRAWING
Experimental sample of private security workers under 35. Study domains: Geographical area (Northwest, Northeast, Center, South, and Islands) and age groups (16-19; 20-24; 25-29; 30-35).

SAMPLE SIZE
Total sample size: 105 cases (105 successful interviews).

CONTACT METHOD
Telephone interviews administered with the Cati/ Cawi system .

DETECTION TECHNIQUE
Structured questionnaire.

PERIOD OF INTERVIEW CONDUCTION
March/May 2025.

CODE OF ETHICS
The survey was conducted in compliance with the Esomar Code of Ethics for European Researchers , the Assirm Code of Ethics (Association of Italian Business Research Institutes and Opinion Polls), and the "Privacy Law" (Article 13 of Legislative Decree 196 of 2003 and EU Regulation no. 679/2016, Articles 13-14).

RESEARCH STAFF
Scientific Director : Dr. Pierluigi Ascani
Research Director : Dr. Maria Francesca Atzeni
Junior Researcher : Dr. Giorgia Pietrangeli

Method | Technical data sheet for the survey of "potential workers" under 35

CLIENT
CoESS – Confederation of European Security Services

AUTHOR
Format Research Srl (www.formatresearch.com)

WORK OBJECTIVES
Study among workers (<35) in the private security sector on the attractiveness of the sector.

SAMPLE DRAWING
Experimental and rational sample of students pursuing or having obtained a degree and/or qualification in a security-related field. Study domains: Geographical area (Northwest, Northeast, Center, South, and Islands) and age groups (16-19; 20-24; 25-29; 30-35).

SAMPLE SIZE
Total sample size: 305 cases (305 successful interviews).

CONTACT METHOD
Telephone interviews administered with the Cati/ Cawi system .

DETECTION TECHNIQUE
Structured questionnaire .

PERIOD OF INTERVIEW CONDUCTION
May/June 2025.

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