

STATE OF THE INDUSTRY 2022

The Locksmiths' Perspective

2022's Business and Technology Trends and Projections

Locksmith Ledger conducted a comprehensive research survey of the industry's top locksmiths and security pros from across North America. We looked to assess the state of business in the security marketplace, the challenges facing locksmiths and budget and planning projections based on current markets.

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THE LOCKSMITHS' PERSPECTIVE

Mission Statement & Introduction

The purpose of this comprehensive Locksmith Ledger research report is to paint a picture of the forces that affect North American locksmiths and security pros and attempt to quantify those effects on market performance.

The results of our annual survey deliver a detailed overview of the current state of affairs in the North American security market. This provides vendors, consultants and security pros with the most up-to-date assessment of useful business data and trends.

This report also seeks to arm end users with enough intelligence to anticipate the security industry roadmap for 2023 and beyond.

All questions or report clarifications should be directed to Senior Editor Will Christensen via email at wchristensen@endeavorb2b.com or by calling **847-496-3815**.

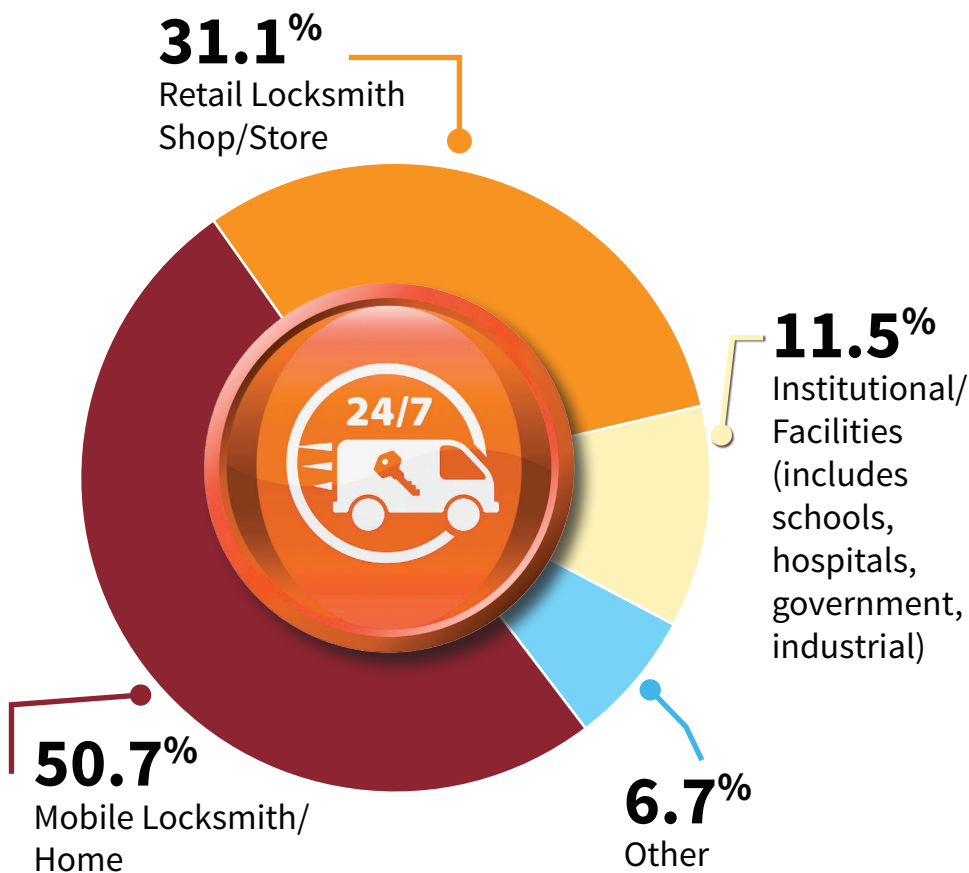
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Locksmiths Still Going Mobile

To produce this report, we invited qualified professionals who subscribe to Locksmith Ledger to participate by filling out a survey. We tabulated the responses from the 225 qualified respondents who participated in this survey.

The largest percentage of security pros who responded to our survey are those who self-identify as mobile locksmiths (50.7) as their primary business, followed by the 31.1% who self-identify as owning a retail shop. In all, 83.6% of respondents describe themselves as working in a private business. The remainder are employed by institutions or in the supply chain.

As one might suspect, a fair amount of crossover exists. Several respondents list some combination of retail, mobile and institutional. Nearly three-quarters of the "Other" selections work for distributors or manufacturers.

Opening Salvos

“Coming up on 48 years in business. You never stop learning if you want to survive.”

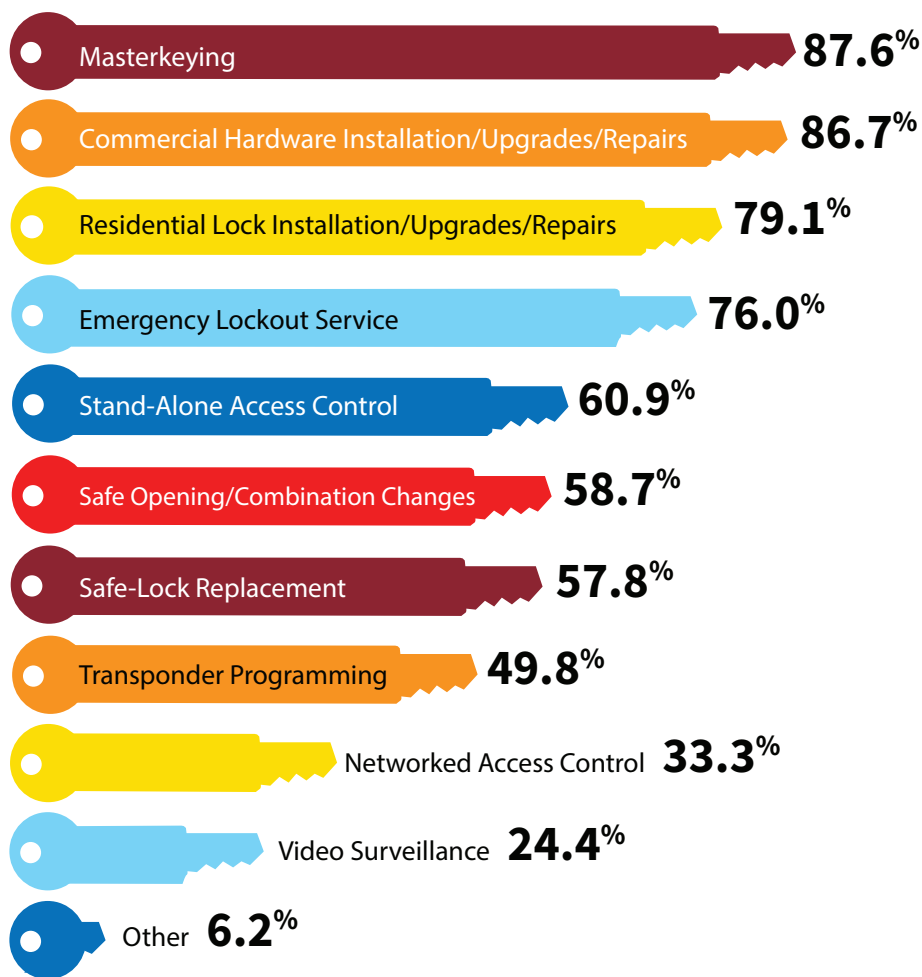
“We have a lot of suppliers who are just not good at getting stuff shipped out the same day, and we’ve come to expect it in the whole rest of the world.”

“The locksmith trade is changing to one of buy a key code and hire a key cutter, not a locksmith.”

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Professional Services

Respondents were asked to name the services their business provides. They were asked to select all that apply, so the sum won't add up to 100%.



Being Handy

Locksmiths have had to perform many tasks — all of them well to ensure future business.

Based on our survey, most still perform many tasks. Nearly half of all respondents (47.1%) say they perform at least nine of the services listed, and 77.8% say they perform at least half.

Unsurprisingly, traditional locksmith roles, such as masterkeying (87.6%) and performing emergency lockout service (76.0%), rank high, while newer high-tech services, such as providing networked access control (33.3%) and video surveillance (24.4%) rank low.

Although there probably always will be a demand for emergency lockout service, we expect these numbers to converge slowly as keyless options continue to proliferate. Competitive pressure also could be behind the change as demand for higher tech security measures increases.

“We’re butting heads with competitors that are national in scope,” says Glenn Younger of Grah Security in San Diego. “Convergent people are saying, ‘Yes, we can do video,’ so if existing customers are saying, ‘We’re talking to the new folks, and they can do video,’ we [have to be able to] say, ‘We can do video, too.’”

One school of thought is that because of so much crossover, locksmiths can stand out from the competition by specializing. Such a strategy seemingly is in the early stages, because only 8.0% say they perform no more than two of the listed services.

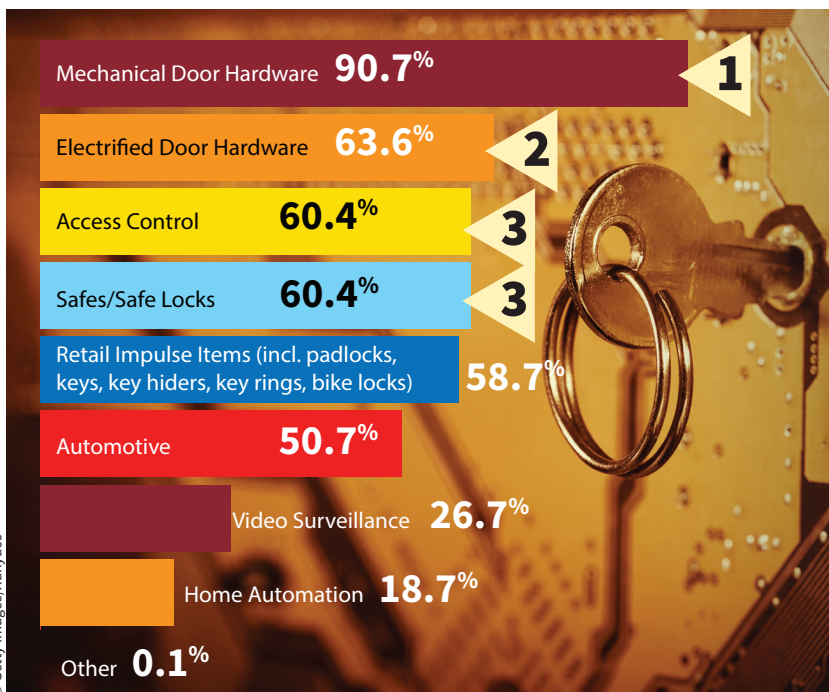
“We get lots of calls for safes, so I would like to eventually gain the knowledge to master them.”

“Whatever comes up.”

Business Product Segments & Selection

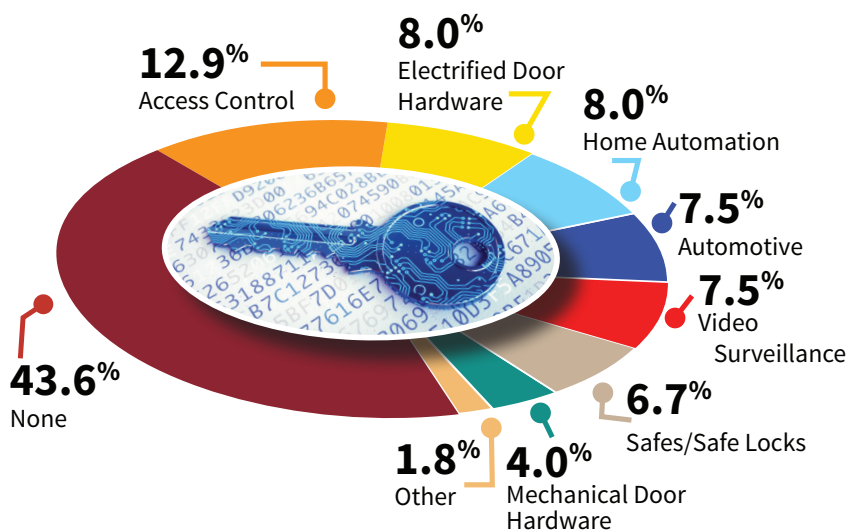
Respondents were asked the following questions about their product lineup. In the first question, they were asked to select all that apply, so the sum won't add up to 100%.

What product segments does your company sell?



© Getty Images/Xanyag9

What product category do you most want to add?



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Powering Up

Make no mistake: Mechanical locks and keys aren't going anywhere. Mechanical door hardware remains, as it has the past two years, the dominant product category among our respondents, with more than 90 percent saying they stock mechanical hardware, in line with previous reports.

Nevertheless, recent reports suggest that sales of electronic smart locks will overtake the sales of mechanical locks by the end of the decade, and our respondents seem to support such a prediction.

Electrified door hardware continues to gain ground — the only category that has increased each of the past two surveys. Nearly two-thirds of our respondents (63.6%) now say they carry electronic products, such as electric strikes and maglocks, up from 56.3% in 2020. Meanwhile, access control eclipsed the 60% level for the first time in 2022.

Those numbers should continue to increase. Among respondents who want to add to their product mix, 66.1% name an electronic category, up from 61.7% in 2021, with access control leading the way.

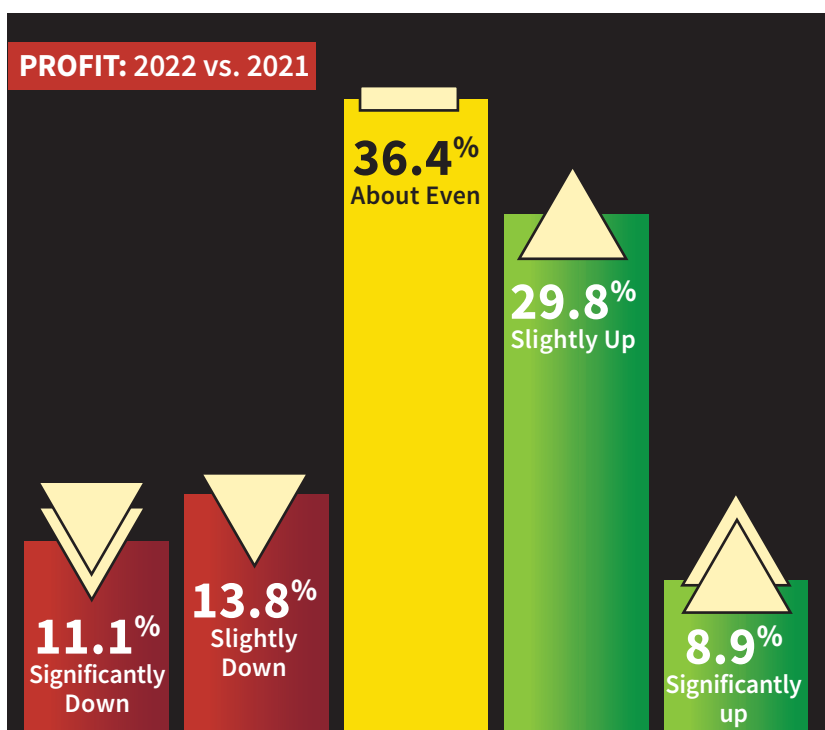
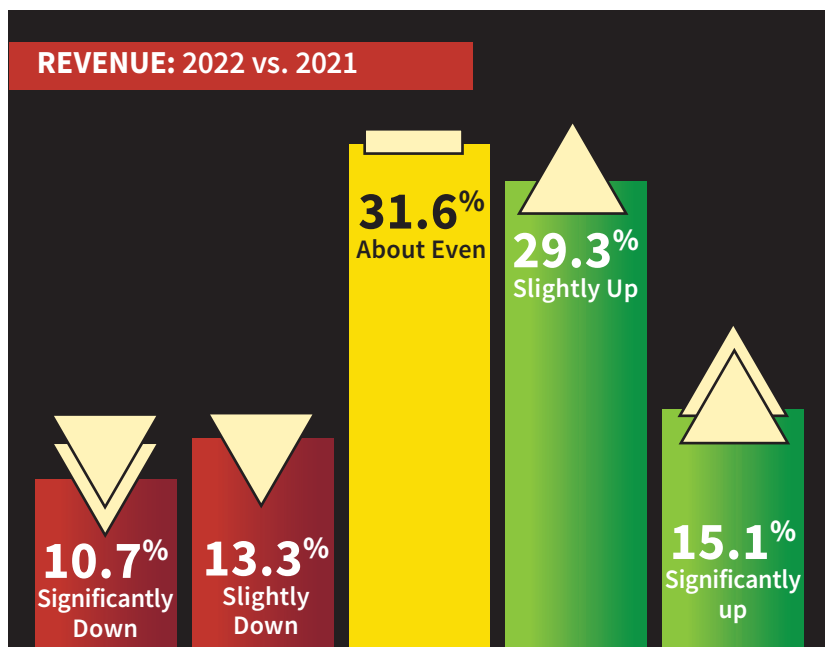
One category that will continue to be interesting to keep an eye on is home automation. Even though it brought up the rear among product categories that respondents sell, it showed a healthy increase over 2021. Plus, a big development during 2022 was the release of the Matter standard and the announcement of the first Matter-compatible locks. Matter is a standard meant to increase interoperability of smart-home products, including security products, such as locks.

Based on the involvement of tech's biggest players — Amazon, Apple, Google and Samsung — Matter could matter a lot to locksmiths in the residential market.

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Revenue & Profit Trends

Respondents were asked how 2022 revenue was trending compared with 2021 numbers as well as how profit was trending during the same period.



Proving the Adage

An adage of the security industry is that it's recession-proof: When times are good, people want to protect what they have, and when times are bad ... people want to protect what they have.

2022 has been a rough year economically for many sectors as well as for the public. For a variety of reasons, including continued backlogs in the supply chain, prices jumped faster in 2022 than they had in decades, bringing the specter of economic recession.

However, one respondent notes with respect to price increases and supply-chain issues that "COVID was the business killer."

The majority of respondents would seem to agree that for all its challenges, 2022 has been a better year financially for locksmiths overall than 2021.

Only 24.0% of respondents say their 2022 sales are down more than 1% compared with the previous year. In 2021, 34.8% said the same thing, and a horrific 56.8% reported a sales decrease of more than 1% in 2020.

Further, only 10.7% say their 2022 sales are down more than 10% compared with the previous year, which is a decline from 19.3% in 2021 and 35.3% in 2020.

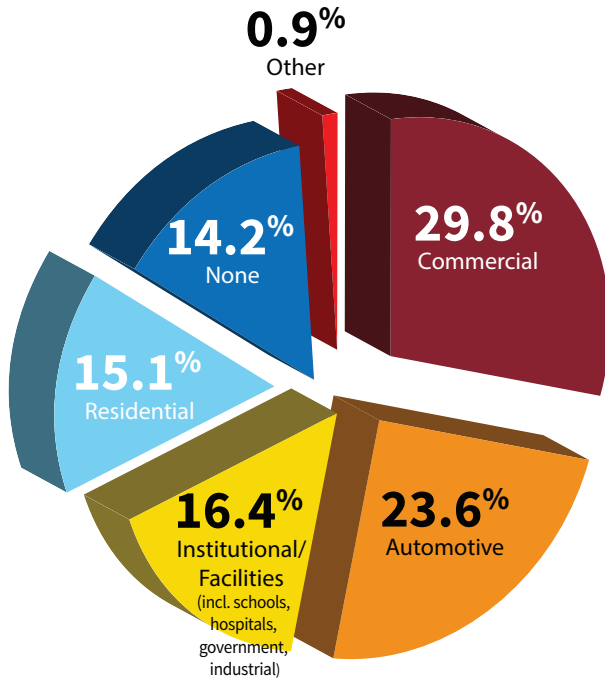
Overall profits appear to be in line with the revenue results, which indicates that locksmiths in general aren't absorbing the rising cost of products.

Less than a quarter of all respondents (24.9%) say their 2022 profits are down more than 1% compared with the previous year, and only 11.1% report a decrease of more than 10%. That represents declines of 10.9 percentage points and 8.2 percentage points, respectively, from 2021.

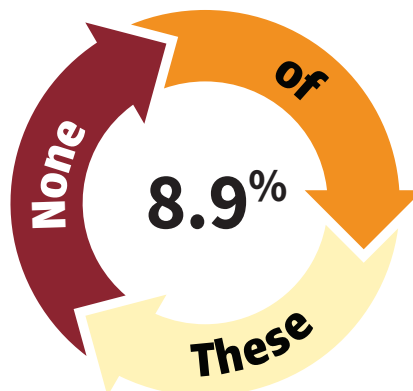
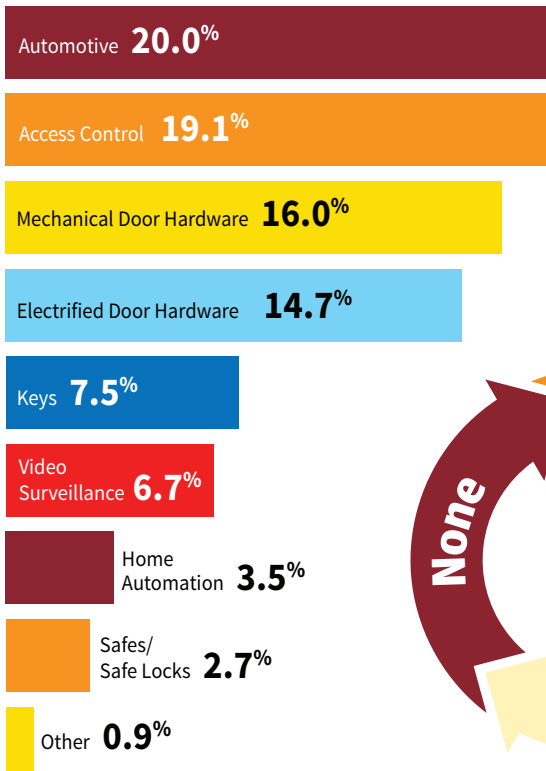
2022 Market & Product Segment Gains

Respondents were asked the following questions about their business with respect to 2022:

Which market segment increased the most for your business in 2022?



Which product segment showed the most growth for your business in 2021?



Commercial Time

This year marks a return to a clear choice among market segment leaders, and the name is familiar.

In 2021, "None of the above" was the top choice for market growth. In 2022, however, commercial returns to the top spot it occupied in 2020. Nearly 30% of respondents say commercial has been their company's biggest growth market, up from 21.6% in 2021.

By contrast, the decline of residential as a market driver continues in 2022. It fell to 15.1%, down from 19.7% in 2021 and 21.0% in 2020 at the height of the COVID shutdown.

Younger, who chose "residential" in 2021, says institutional was the top choice for his business in 2022, adding that COVID was, in a way, responsible for both. In 2021, it was because of people working at home. In 2022, it was the Great Resignation.

"We're doing a stadium [now] where they had a lock guy on staff and that person's no longer there," he says. "They took another job somewhere else, and [stadium management] is saying, 'Hey, we need some help. Can you help us?'"

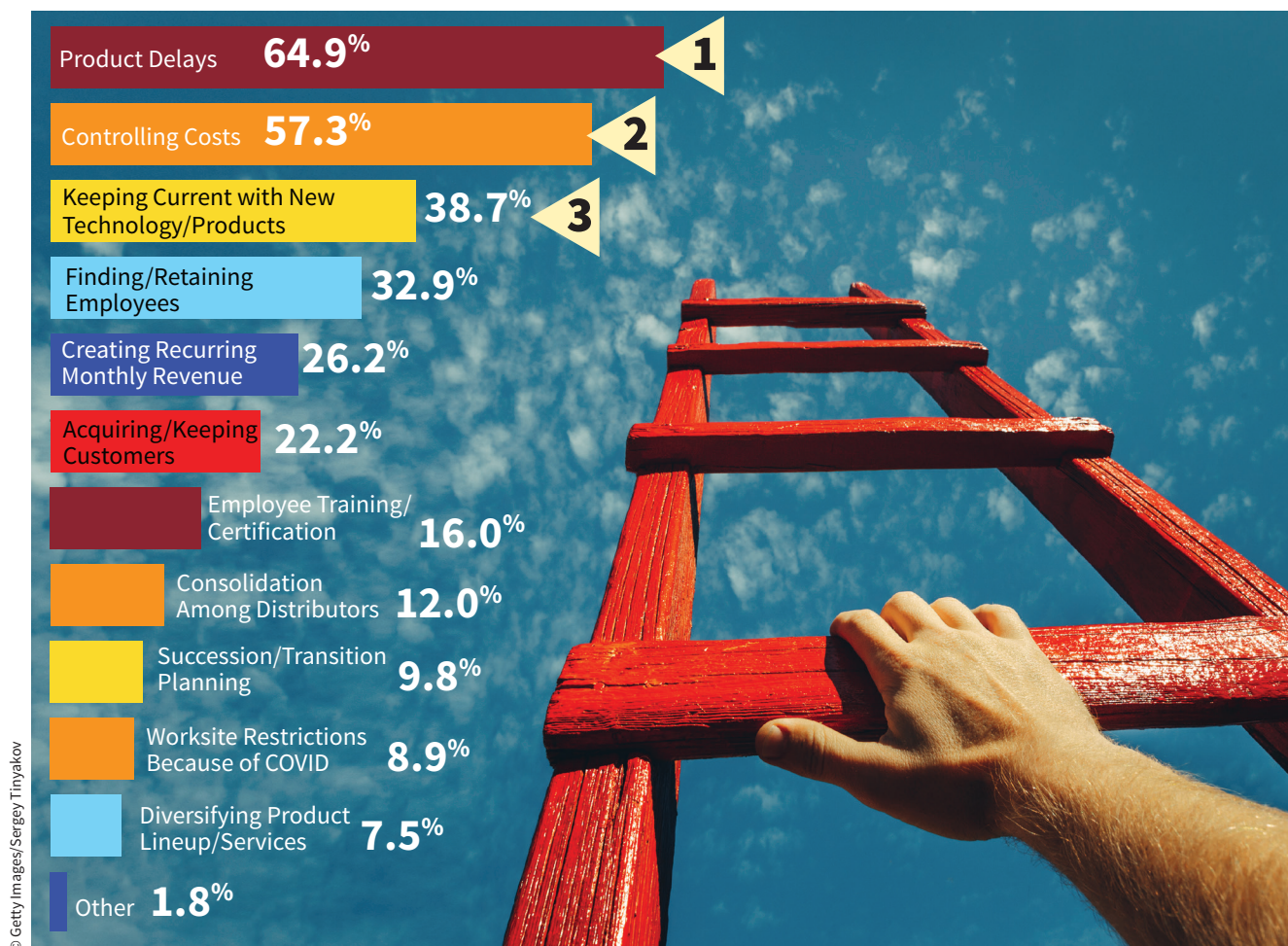
Among product segments, automotive remains on top among growth leaders for the third consecutive year. With the average age of U.S. vehicles still at all-time highs, that product segment should remain good for locksmiths.

However, the biggest gainer in 2022 is electrified door hardware. The percentage of respondents who chose it as the product segment that showed the most growth nearly doubled from 2021.

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Business Challenges for Locksmiths

Respondents were asked about the biggest challenges to their business in 2022. They were asked to select their top three challenges, so the sum won't add up to 100%.



Difficulty Ahead

Although COVID faded from public consciousness for the most part after the lifting of nearly all mandates, its effects continue to be felt by more than just those whom the coronavirus infects. The security industry hasn't been immune in this respect.

COVID lockdowns of 2020 that affected manufacturing and transportation have carried over. As a result, raw materials and electronic components necessary to make locks and other security hardware have become difficult to come by. That, as well as a spike in the price of petroleum, which affects the price of everything, has led to general inflation.

Those two interconnected issues are at the top with respect to posing challenges to locksmiths during 2022.

Nearly two-thirds of our respondents (64.9%) note

product delays as a top challenge, while 57.3% tab controlling costs as one. Both results represent increases of almost double the percentage of respondents who included them among their top challenges in 2021.

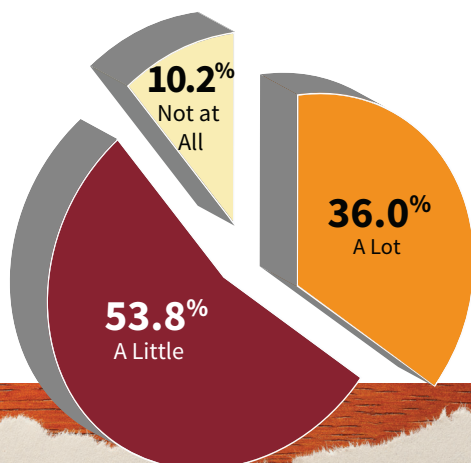
"We've had to change several of our processes to be more diligent, more specific on all costs, down to every price on every piece of hardware that we buy," says Chad Lingafelt, managing partner of Loc-Doc Security in Charlotte, North Carolina, about controlling costs.

As for the challenge of product delays, Younger says, "That's definitely in there. We've had our first couple of 45-, 50-week lead-time quotes. I was like, 'What? Really?'"

Some locksmiths would take a 45-week, or 11-month, delay. One respondent notes an 18-month quote for a part.

Respondents were asked the following questions about the effects of the supply-chain breakdown. In the second question, they were asked to select all that apply, so the sum won't add up to 100%. NOTE: Because 23 respondents say backlogs have had no effect on their business, the percentages in the second question reflect those where they did.

How much have supply-chain backlogs affected your business?



Chain Links

Supply-chain disruption has been a major story in the security industry throughout 2022, and it's unsurprising that its effects have been felt nearly universally.

Almost 90 percent of our respondents say backlogs had some effect on their business in 2022, although nearly 60 percent of those say the backlogs actually didn't affect their business all that much.

Although what constitutes "a little" vs. "a lot" might depend on a person's perspective, only 25.3% of our respondents cite lost jobs — and, thus, lost income — as a way that backlogs affected their business.

As one locksmith notes, "Shipping costs made us look elsewhere, and we have lost some jobs while waiting on parts. Then, we get stuck with the bill and no reimbursement from the customer."

Lingafelt, who says product delays have affected his business only "a little," says it affected his company most with respect to project planning, which affected cash flow. He cites the example of a project that involves doors, locks and hinges.

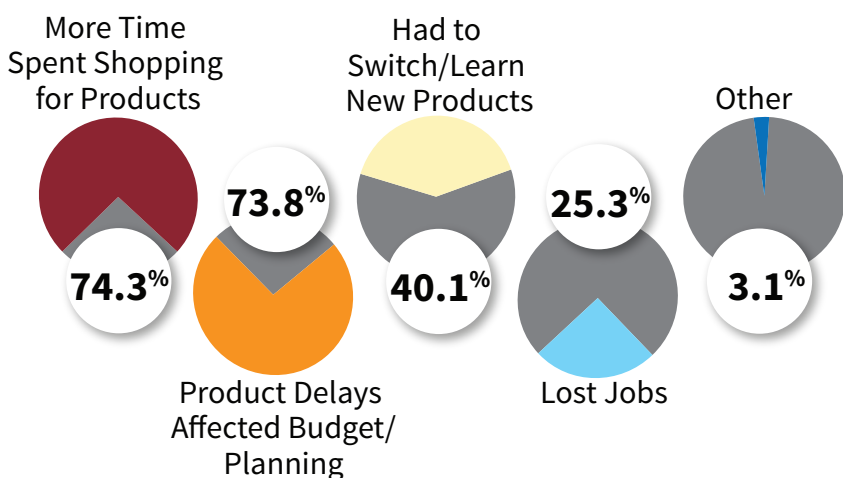
"You have to plan for the longest lead time and then stage everything so it gets here within a short window," he says. "If you got the doors faster [than the hinges], you could be sitting on a large lump sum of cash, waiting on hinges for 12 weeks."

Of course, something that appears to be a mere inconvenience, such as more time spent shopping, can lead to work backlogs eventually.

Delays also can lead to unhappy customers, but, fortunately, only a handful of respondents mention that as a negative effect.

"Customers have been surprisingly patient," Younger says.

In what ways have supply-chain backlogs affected your business?



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Product Purchase Sources

Respondents were asked about from where they get their products. They were asked to select all that apply, so the sum won't add up to 100%.

Large National Chain Distributors **73.3%**

Local Locksmith Distributors **64.4%**

Online Vendors, such as Amazon **33.8%**

Direct from Manufacturers **33.3%**

Big-Box Stores **24.4%**



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Shopping Around

Consolidation was the big story of distribution in 2021, but actual distribution of products has been the central issue in 2022. Product delays that led to project and, thus, revenue delays and rising prices have been a major concern with locksmiths, and the effects of the supply-chain disruptions can be seen in our data.

Distributors, whether national or local, remain the predominant method of product purchases in the industry, as in 2021. But more locksmiths are turning to sources seen by some as business threats. More than a third of all respondents (33.8%) say they buy from online vendors, and nearly a quarter (24.4%) say they buy from big-box stores.

More than likely, this increase speaks to the difficulty of getting products through typical channels. In fact, the average number of sources from which respondents buy products jumped 12.1% in 2022 compared with the previous year.

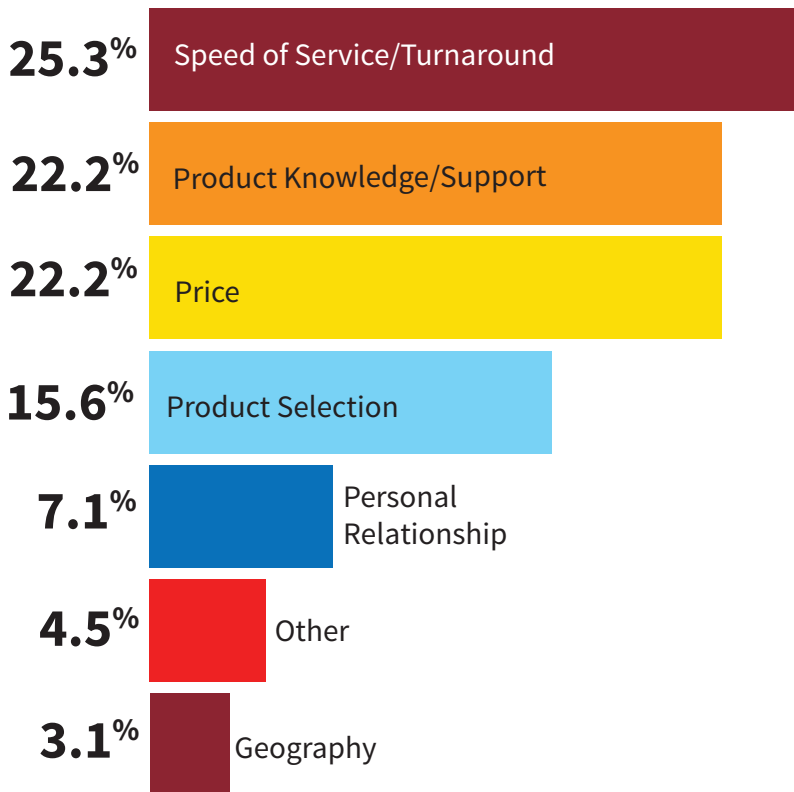
But other issues also might contribute to that increase. As one locksmith notes, “We turn to Amazon a lot if we need a quick order to get here fast and don’t want to pay a huge shipping fee [on] a minimum order. Free-with-Prime next-day shipping — can’t beat that.”

“We have an exploding industry here in the automotive locksmith sector, and the biggest hurdle is Canadian-specific inventory. The first distributor to offer constant, reasonably priced, Canadian-specific stock will become very wealthy.”

Product Purchase Influences

Respondents were asked the following questions about what influences their product purchases.

What's most important when selecting a distribution partner/source?



More Support

It's no surprise that product availability and price would be important when selecting a distribution partner. But it also isn't surprising that as more locksmiths spend more time shopping for products, distributors that provide product knowledge and support are greatly valued.

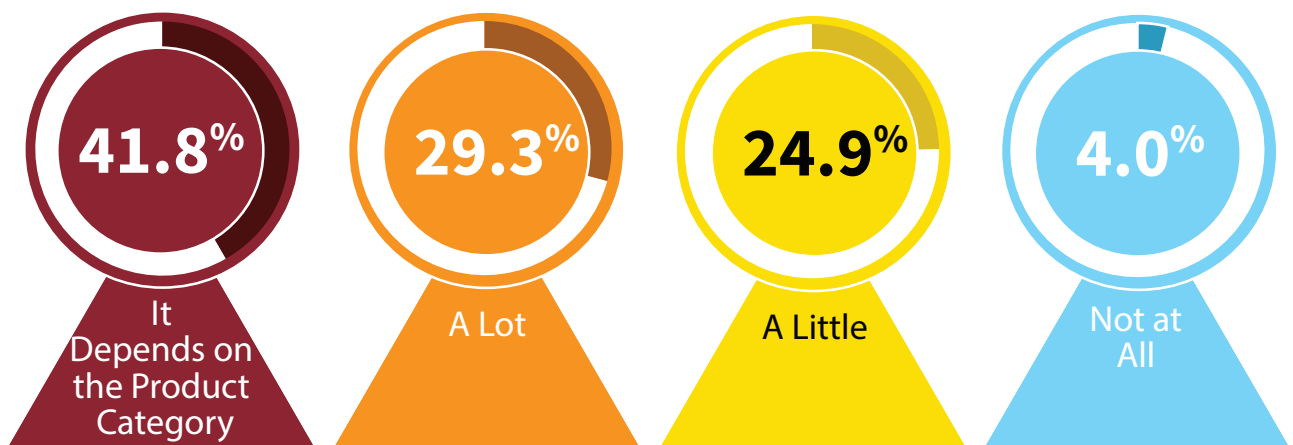
Speed of service/turnaround remains the No. 1 factor but with a decline of nearly 25% from 2021. Meanwhile, Product knowledge/support more than doubled, moving into a tie with price. As one locksmith notes, "Price can be outweighed by service and knowledge."

Younger agrees. "If I have a question, how able are [distributors] to help us? Price isn't even on the list."

Of course, price still matters when it comes to product selection, with 96.0% saying it matters at least somewhat. But in 2022, it's far more dependent on the product category, with that response moving up from third place in 2021.

As one locksmith notes, it's all subjective: "My customers do not mind paying for quality."

How much does price affect your product selection?



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Threats to the Security Market

Respondents were asked about the biggest threats to their business.

They were asked to select their top three threats, so the sum won't add up to 100%.



54.7%

Increased Prices



47.1%

Economic Conditions



43.1%

Product Delays



32.0%

Unscrupulous Competitors/Scammers



31.1%

Finding/Retaining Employees who Have the Right Skills



21.8%

Technology Outpacing Skills



21.3%

Internet/Direct Sales



19.6%

DIY Big-Box Stores



17.8%

Competition from Larger Service Providers



7.1%

Regulatory Compliance



4.0%
Other

Top choices include "negative online reviews" and "none."

Money Matters

Economic conditions always are a top threat to any business, and that's been no different for the locksmith in 2022. However, two specific economy-related threats once again bear the markings of supply-chain disruption.

The threat of increased prices is in the top spot this year, displacing economic conditions for the first time in our survey. More than half our respondents (54.7%) name increased prices as one of the biggest threats to their business in 2022. That represents an increase of 45% over 2021.

Meanwhile, the threat of product delays increased 36% over 2021 to finish a close third.

As one locksmith notes with respect to the threat of product delays, "We had to design solutions around available products, and we had to look less professional when promised hardware is late."

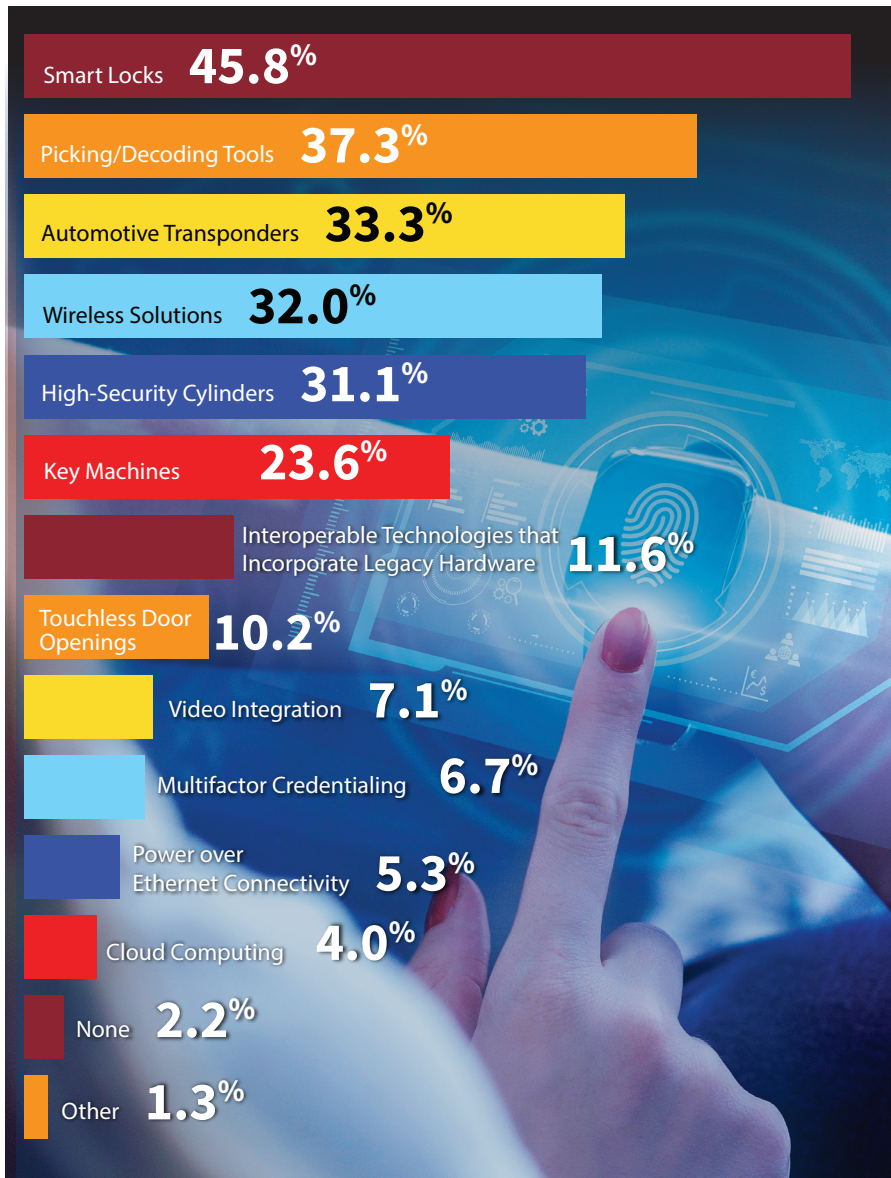
After the economic categories, the biggest threats, with around one-third of respondents choosing either, is finding the right employees and dealing with scammers. However, two longtime threats don't appear to be as important as in previous years — internet or direct sales and big-box stores that cater to the DIY market. Both declined in 2022.

It would seem that when product supply is difficult, any source that has inventory becomes more friendly, although passions still can run high, as one locksmith who cites direct sales eloquently puts it:

"STOP MAKING SALES TO THE END USER! LET THE LOCKSMITH DO THAT!!"

Importance of Technology Advances

Respondents were asked to select the technology or service advancements that were most important to their business. They were asked to select their top three choices, so the sum won't add up to 100%.



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A Lock on Interest

That sales of smart locks are expected to overtake those of mechanical locks by the end of the decade is no surprise. End users want the convenience of using their smartphone to unlock a door, and building managers want to control access to doors. A smart lock delivers on both.

Naturally, interest in smart locks remains top of mind for locksmiths in 2022. Smart Locks has been the No. 1 technology of interest all three years of our research, and its margin over the No. 2 choice remains substantial. We don't expect that to change anytime soon.

As was the case in 2021, four options group below the top spot in 2022. These convey a wide range of interests and market demands while including all major avenues of locksmithing — mechanical, electronic, residential, commercial and automotive.

However, a few respondents say none of the listed choices is important to their business, and Lingafelt agrees, although he acknowledges that his reason touches on interoperability (and, obviously, smart locks). What's most important to his business is "having products that work and talk to each other, even if they are not from the same manufacturer."

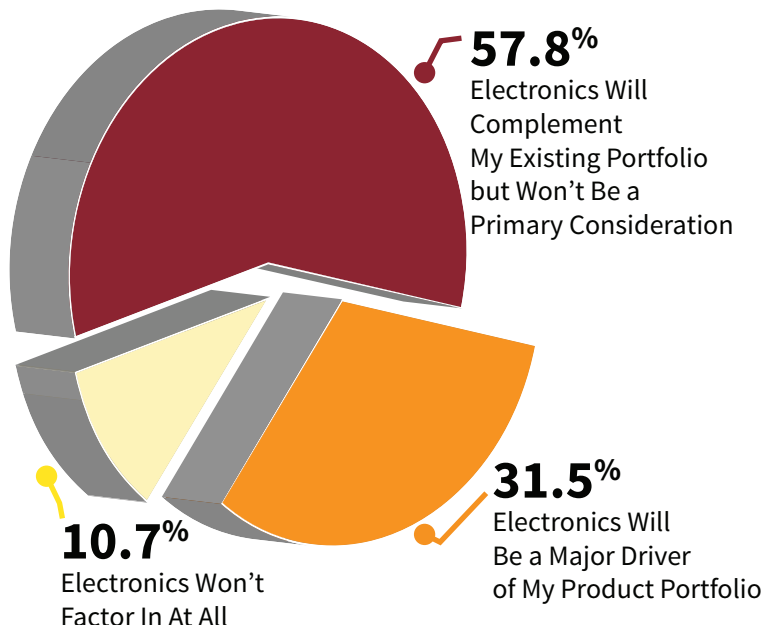
Because manufacturers tend to work only with their own platforms, "an end user, if they're using anything that's app-based, they have to use five or six different apps to do one thing or to use things at their facility."

“What my customers ask for today is most important. Yesterday was different. Tomorrow will be different.”

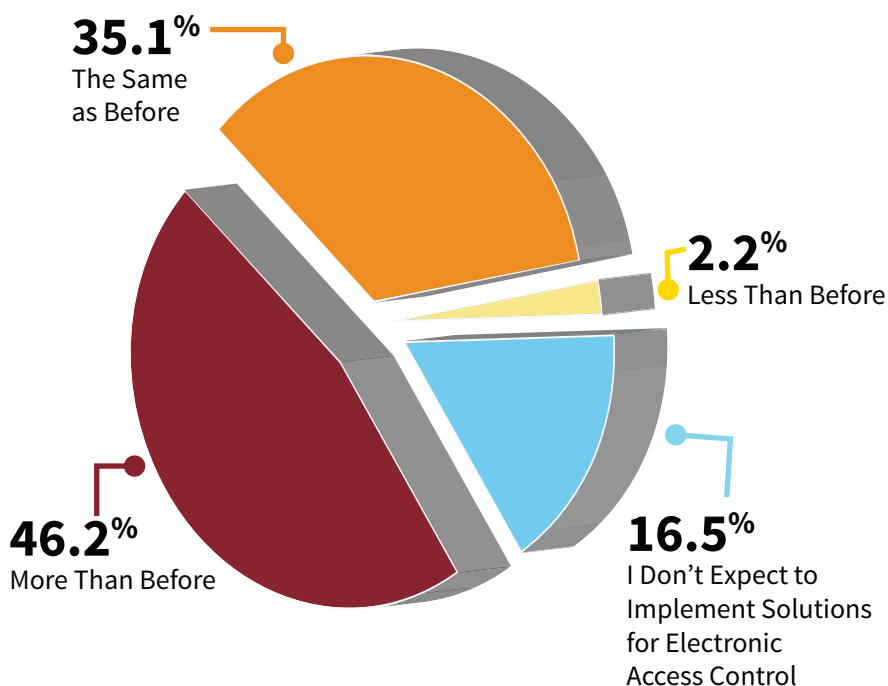
Electronics & Access Control

Respondents were asked the following questions about their business with respect to electronics and access control:

What effect will electronics have on your locking solutions within the next 3 years?



How much does your business expect to implement with respect to solutions for electronic access control?



Getting a Charge

Webster defines a “locksmith” as “a person whose work is making or repairing locks and making keys.”

It seems Webster should get with the times. Sure, repairing locks and making keys still is a big part of locksmithing, but a locksmith who does only those things in most cases doesn't have much of a future in an industry where the “key” is increasingly found on a mobile phone.

The LIST Council, instead, defines a locksmith as “a person with the ability and knowledge to select, install, service and/or bypass the components of electrical or mechanical locks.”

Besides being more complete, the key addition is the word “electrical.”

Electricity has changed the game in security, and locksmiths continue to change with the times. The percentage of respondents who say electronics will be a part of their product portfolio in three years continues to increase, now sitting just a shade below 90%.

Meanwhile, the percentage of locksmiths who expect to do more electronic access control (EAC) business than before continues to rise. In 2022, 46.2% of respondents say they expect that business to increase, compared with 44.0% in 2021 and 43.1% in 2020.

The percentage of “holdouts” who don't expect to implement EAC remains high — 16.5%, the same as in 2021 — but that might have more to do with circumstances beyond a locksmith's control, as one points out: “Most of our support is in an area without connectivity.”

Importance of Access Control Technology

Respondents were asked to select the electronic access control technologies that were most important to their business. They were asked to select their top three choices, so the sum won't add up to 100%. NOTE: Because 54 respondents say their business doesn't handle electronic access control, the percentages reflect those that do handle it.



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Wanting to Get Smart

When it comes to interest in technology in general, the No. 1 topic continues to be smart locks. So, it's no surprise that the technology behind smart locks, near field communications or, increasingly, Bluetooth Smart, remains the top EAC technology that interests today's locksmith. Close behind that, however, is remote lock management.

More than half of our respondents include smartphone tech or remote lock management among their top three technologies of interest, and more than a quarter (27.4%) name both.

Interestingly, the importance of wireless or Power over Ethernet, which is aimed at making installation easier, continues to decline as an EAC technology of interest, losing more than half its interest from a high of 45.8% in 2020.

Another EAC technology also has lost more than half its support in two years. Fewer than 20% (18.1) of our respondents include touchless door openings among their top three EAC technological interests, down from 38.5% in 2020.

All of this speaks to the increasing power of the smartphone in the security industry. "Any mobile-focused solution is what everybody needs to be focused on," Lingafelt says.

He adds that his business is particularly interested in acquiring more service contracts in the next year. EAC typically lends itself to such a business model.

"The future of our industry is going to be directly related to building budgeted service agreements that would change the trajectory of a service-based business to have more intentional and expected revenues," he says.

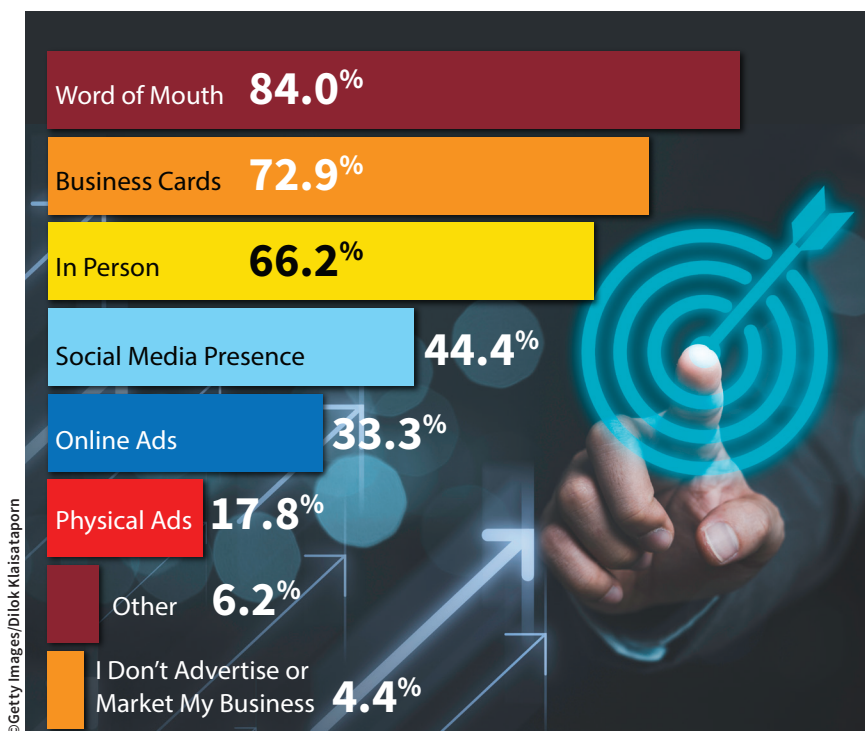
“We only install hardware and partner with alarm companies for the IT and electronic aspect.”

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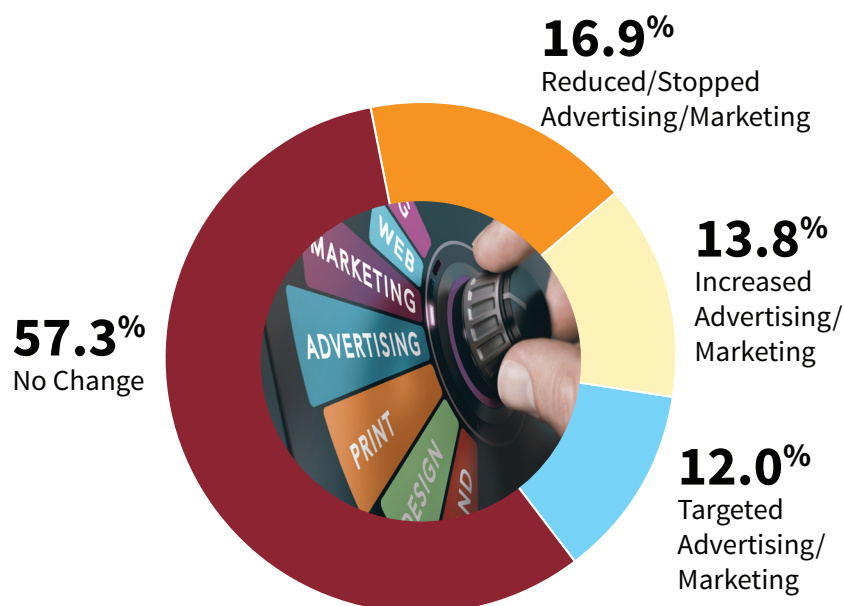
Marketing Strategies

Respondents were asked the following questions with respect to marketing. In the first question, they were asked to select all that apply, so the sum won't add up to 100%.

How do you advertise or market your business?



What change did you make to your advertising or marketing program in 2022?



The Old Ways

In the old days, marketing a locksmith business consisted of a simple strategy: a placement in the Yellow Pages, preferably as close to the front of the section as possible, a stencil on a van, a business card and lots of good word of mouth.

Those methods remain, minus the Yellow Pages, of course, and it would appear that they still are the preferred ways of getting out the word.

Word of mouth, business cards and in-person marketing are by far the most popular methods among our respondents for marketing their business. In fact, more than half (51.6%) of all respondents include all three.

Of those who don't advertise or market, half note that their position as a full-time institutional locksmith makes advertising irrelevant.

In the future, it will be interesting to see whether the percentages for internet-based advertising, such as a social media presence and direct online advertising, increase. However, Younger recently discovered a new old way that has worked for his business in 2022 — the telephone, or, specifically, his lockshop's on-hold messaging.

"We changed our messaging so part of it is, 'Hey, are you or somebody you know looking for a job?'" he says. "Our on-hold message advertises the fact that we're hiring and new things that we have. 'Did you know we do video?'" Younger says his company since has received quality resumes for jobs based on the on-hold message.

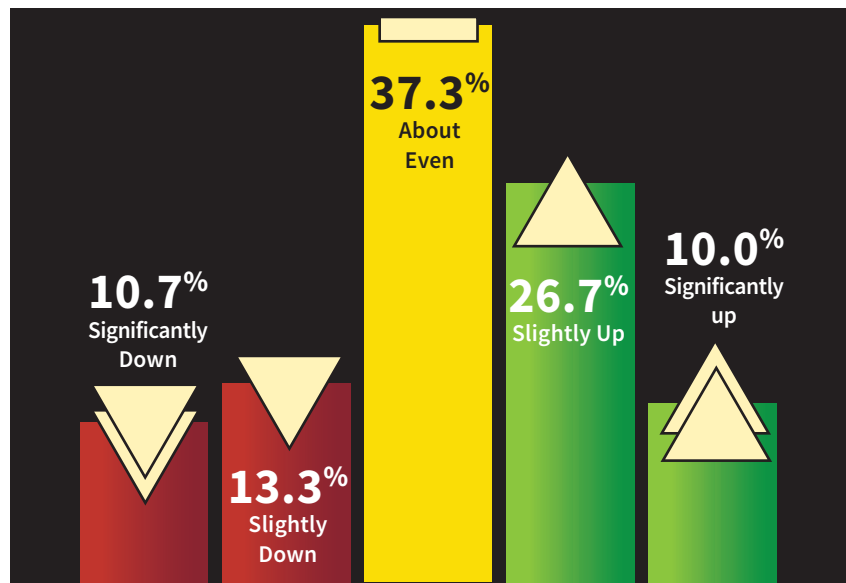
However, for a majority of locksmiths, 2022 was a year of steady as she goes as far as marketing strategy, with 57.3% saying they made no change, compared with 51.1% in 2021.

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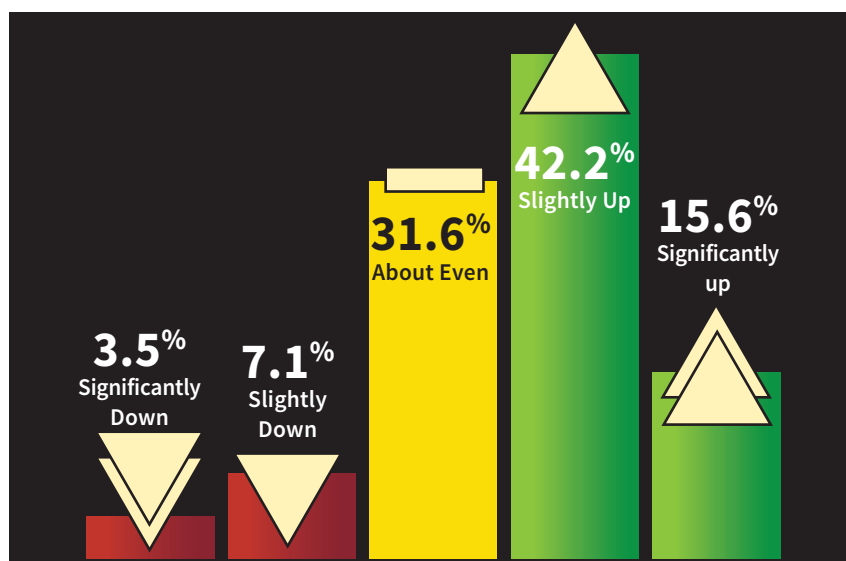
Work Trends & Projections

Respondents were asked how 2022 scheduled work was trending compared with 2021 as well as their expectations for future projects.

Weekly Scheduled Work: 2022 vs. 2021



Expected Weekly Work 2023 vs. 2022



Trending Up

Another reflection of improved business despite difficult economic conditions is that work loads have increased significantly in 2022. Only 24.0% of our respondents report a decline in weekly work relative to 2021, compared with 35.4% in 2021, and nearly 90% expect work to at least stay the same if not pick up in 2023. Hopefully, those expectations will be fulfilled.



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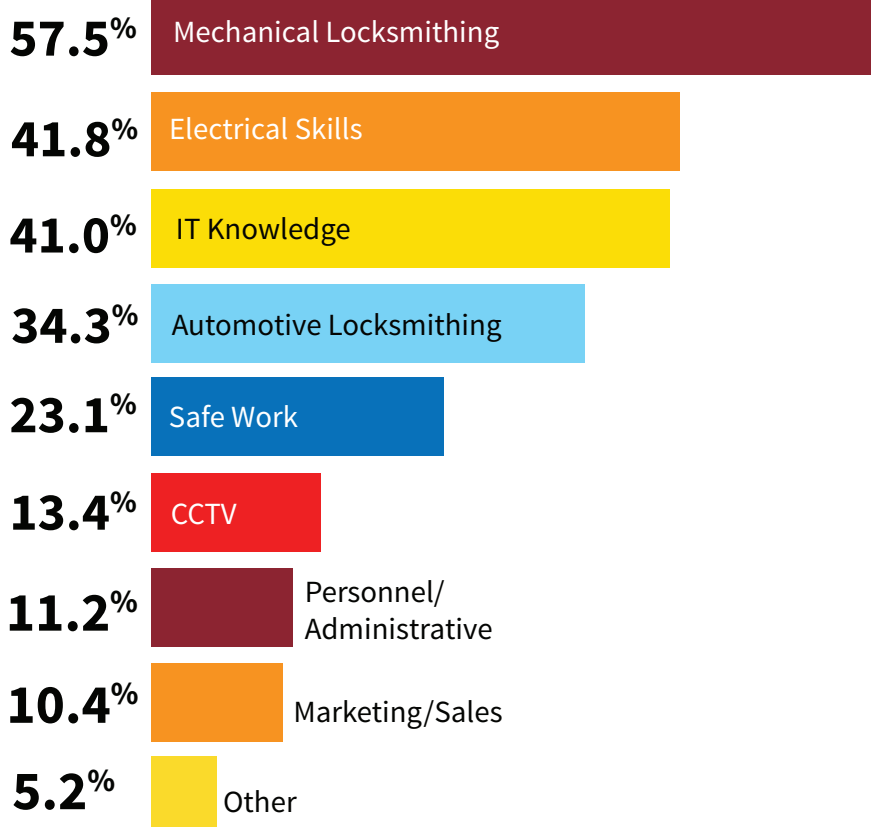
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Personnel: Hiring & Training

Respondents were asked the following questions about their business with respect to hiring workers and training. In the first question, they were asked to select their top three specialties, so the sum won't add up to 100%. NOTE: Ninety-one respondents said they don't expect to make any hires, so the percentages reflect those who do.

What specialties will you seek in future hires?



Looking for Help

After three years of surveying locksmiths about the qualities they seek in hires, a clear trend has emerged: Prior experience isn't necessary.

To be sure, it still is desirable. The top trait that employers seek for the third consecutive year is mechanical locksmithing skills, with a majority (57.7%) of respondents naming it among their top three. However, that number is down considerably from 63.9% in 2021 and 77.0% in 2020.

Similar, albeit not as dramatic, declines are seen for electrical skills and automotive locksmithing.

In fact, some employers see prior locksmithing skill as a potential detriment.

"I'm more looking for people with good quality character who are humble, hungry and smart and that we can train them," Lingafelt says. "I prefer not to bring people in that have any specialty skills, because they typically come with a lot of baggage."

As for the preferred method of training — either new or current employees — online remains the dominant choice. For the third consecutive year, respondents prefer online training by more than 30 percentage points over the runner-up option.

How do you most prefer to receive continuing education/training?



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