

# STATE OF THE SECURITY INDUSTRY: AN INTEGRATOR'S PERSPECTIVE

## 2019's Annual Business and Technology Trends & Projections

For the third consecutive year, *Security Business* magazine and SecurityInfoWatch.com have conducted a comprehensive research survey of the industry's top security systems integrators from across the United States – looking to assess the state of business in the security marketplace, the challenges facing integrators, along with budget and planning projections based on current markets.



**SECURITY  
BUSINESS**  
The Path to Greater Profits for Security Integrators



**SECURITY**  
INFOWATCH.COM



2019 STATE OF THE  
SECURITY INDUSTRY:  
An Integrator's Perspective

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Mission Statement  
& Introduction

The purpose of this annual Security Business magazine survey is to paint a picture of the forces impacting U.S.-based security integration businesses and quantify those effects on bottom-line market performance.

For security industry technology vendors and solutions providers, it is imperative that there is an understanding of the challenges and market pressures faced by their integration partners, since those events will ultimately shape the relationships with end-user clients.

The results of our third annual security industry survey is a detailed overview of the current state of affairs in the U.S. technology integration market, providing vendors, consultants, A&Es and integrators the most up-to-date assessment of useful business data and trends.

This report also seeks to arm end-user practitioners with enough actionable intelligence to anticipate the security roadmap for 2018 and beyond.

All questions or report clarifications should be directed to Security Editorial Director Steve Lasky via email at [steve@securityinfowatch.com](mailto:steve@securityinfowatch.com) or by calling 800-547-7377.

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# Tracking The Respondent Demographics

## METHODOLOGY

The SecurityInfoWatch Media Group

### STATE OF THE SECURITY INDUSTRY:

AN INTEGRATOR'S PERSPECTIVE was delivered

to approximately 50,000 e-mail subscribers

from opt-in only qualified professionals

from **SecurityInfoWatch.com** and our print

publications *Security Business* (formerly *SD&I*

*magazine*) and *Security Technology Executive*.

Of those, we tabulated the responses from the 180

qualified respondents who participated in this survey.



## Organization's **Primary Business** Function

### OF THE 210 RESPONDENTS:

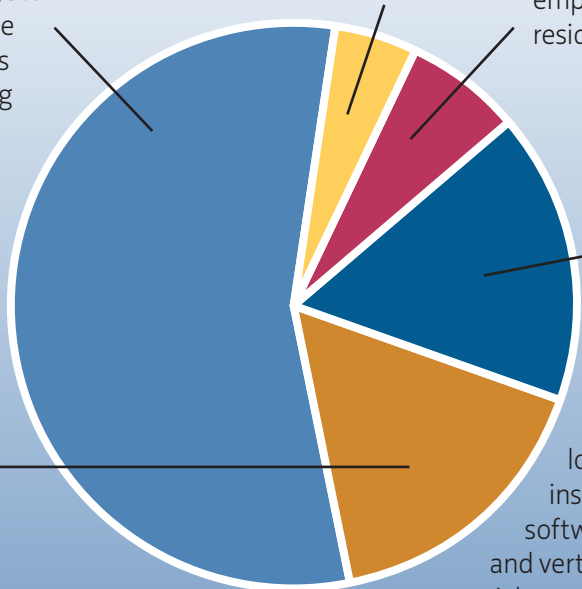
**57%** self-identify as a physical security integration firm with primary emphasis in commercial systems. This would include enterprise system design using multiple technology solutions and vendors, offering consulting services and outsourced resources.

**6%** self-identify as an IT-centric systems integration firm with a primary focus on IT infrastructure design, cybersecurity, consulting and outsourced services.

**5%** self-identify as security integrators with primary emphasis only in residential systems.

**15%** self-identified as a security consultant or a provider of IT consulting services.

**17%** were classified as "other" - with the top 3 categories being locksmiths/installers, software designers and vertical market-specialty contractors.



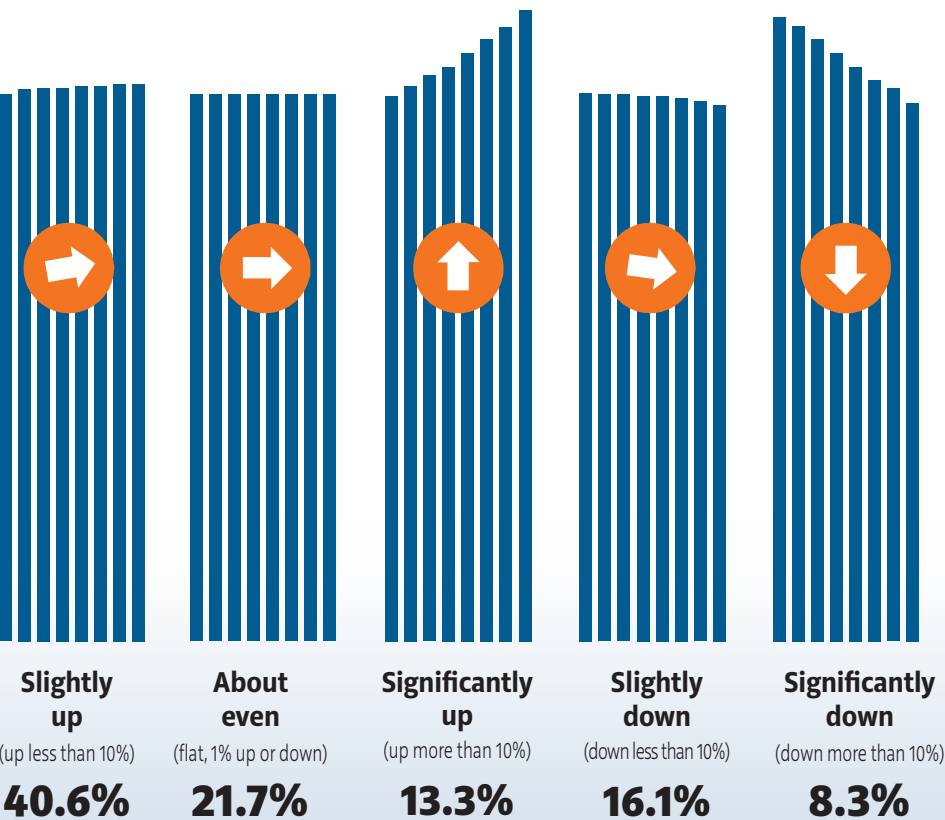
## Respondent Profile Shows Commercial Market Expertise

The largest percentage of the 180 responding integrators to our annual survey were physical security systems integration firms that self-identified as handling commercial security systems. While many of these integrators also do work in the residential space, their primary focus would be total enterprise commercial systems design using multiple technology solutions and vendors, offering consulting services and outsourced resources. In all, 68% of respondents would be classified as a traditional or non-traditional security integrator. A large portion of the remaining 32% of respondents represent security-specific consultants and other integrator-adjacent businesses.

# Revenue & Margin Trends

Respondents were asked how 2019 **revenue** is trending vs. 2018 revenue numbers, as well as how **gross margin** (preceding page) is trending in the same period.

## REVENUE: 2019 vs. 2018



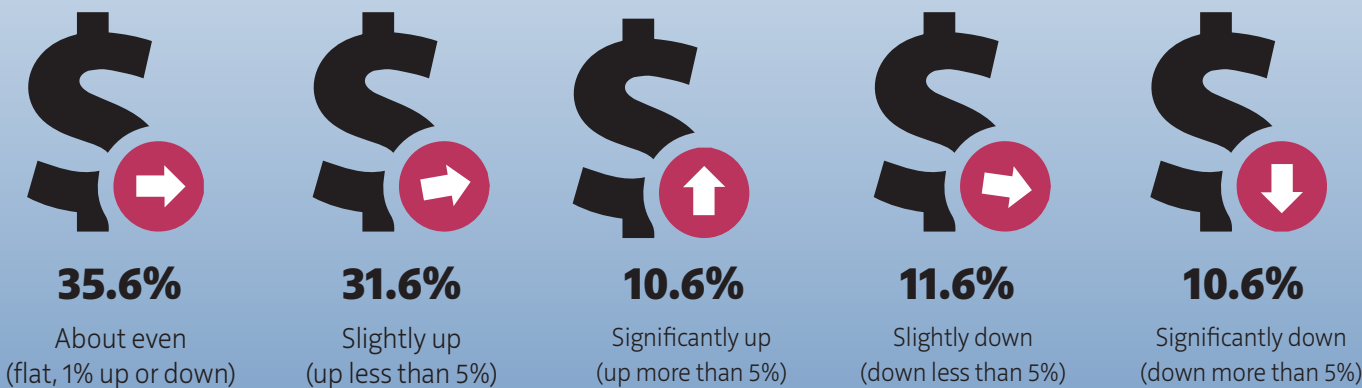
### Modest Gains for the Majority, but Negative Projections on the Rise

Our 2018 study last year revealed responses by integrators to the questions related to revenue and margins were almost identical to 2017; however, the responses in 2019 reflected an increase in some negative indicators.

First the positive: 75% of security integrators project revenues of "about even," "slightly up," and "significantly up" in 2019 vs. 2018. Along the same lines, nearly 78% report an increase or no decrease in gross margins. Both of these statistics, however, were down from our 2018 report, when more than 82% were in the positive on revenue and 80% reported positive on gross margin.

In turn, the number of integrators reporting negative revenue and gross margin trends has increased in 2019 vs. our 2018 report - with more than 24% of integrators projecting 2019 to be a worse year than 2018 in terms of revenue, and 22% with negative projections on gross margin. Last year, 17.5% reported negatively on revenue numbers and 20% projected negative gross margins for the year.

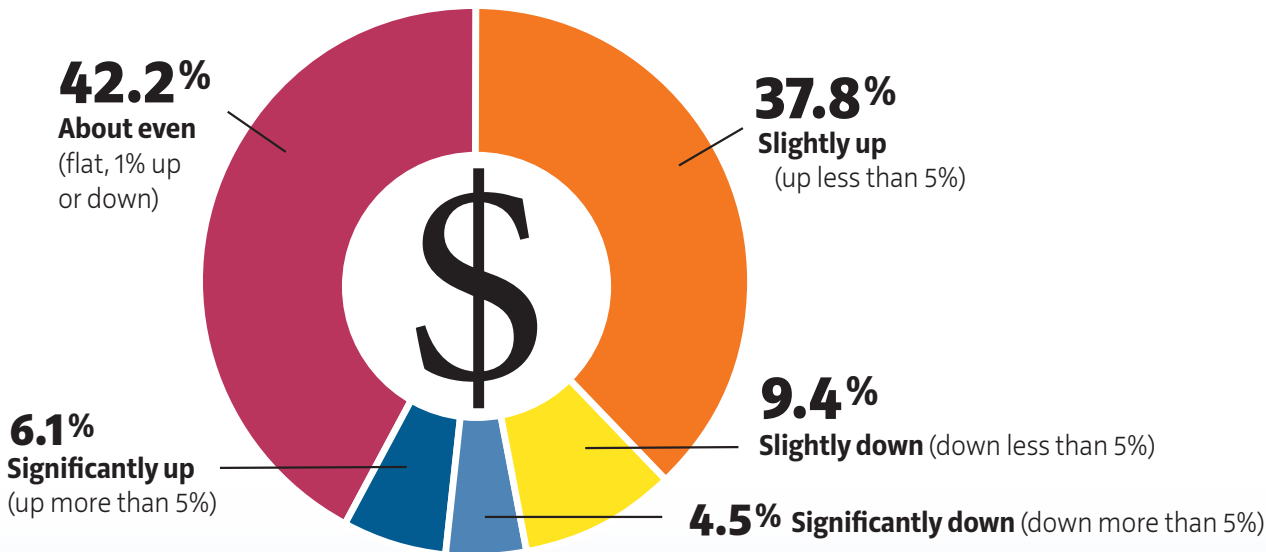
## GROSS MARGIN: 2019 vs. 2018



# Economic Forces on Security Projects

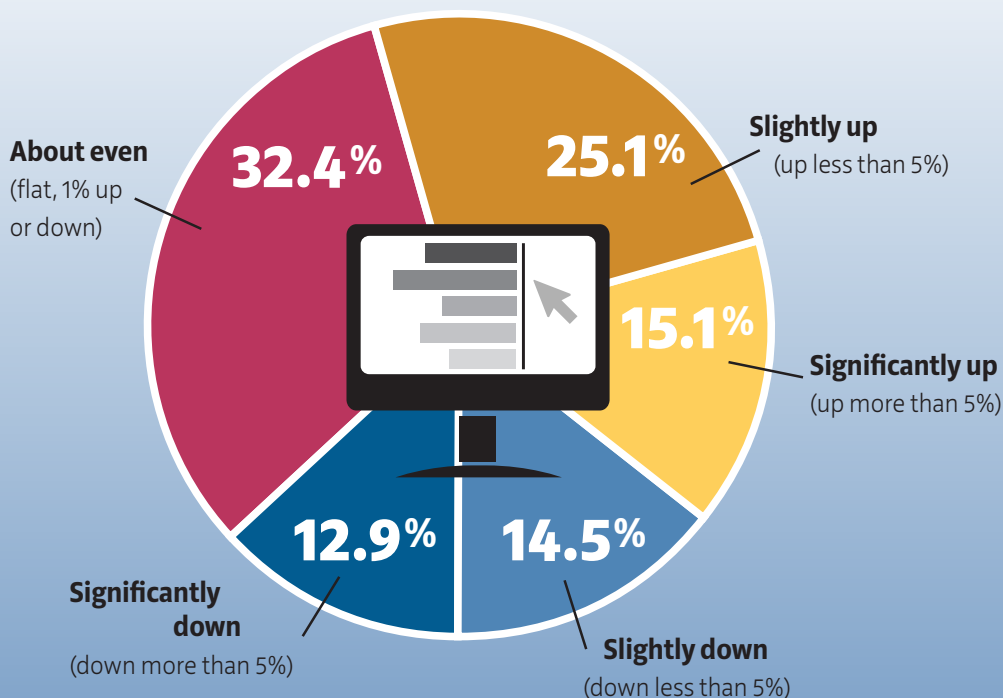
Integrators report that the costs to implement full security projects are continuing to increase, with 43.9% projecting that costs in 2019 will be more than they were in 2018. This number is nearly identical to the figure we reported in 2018, when 43.2% of respondents reported costs on the rise.

## Costs for Solution Implementation



## Customer Project Backlog

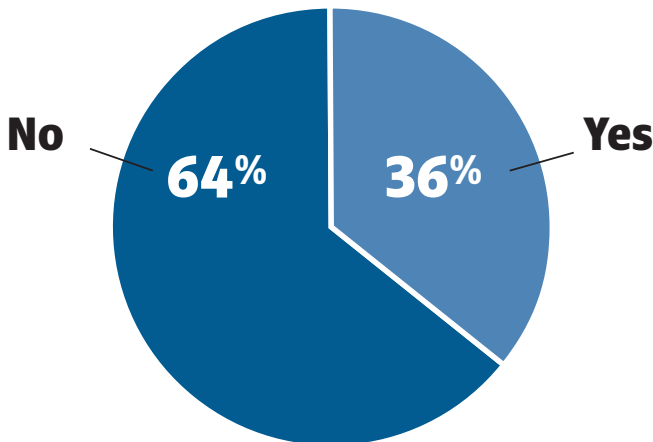
Integrators were asked to compare their customer project backlog for the next six months vs. the same period last year. There was a marked increase in "slightly down" and "significantly down" responses in our 2019 survey compared to 2018 (27.4% vs. 19.1% last year).





## Integrator Consolidation Trends

Have you been approached within the past 24 months to sell or merge your business with another company?

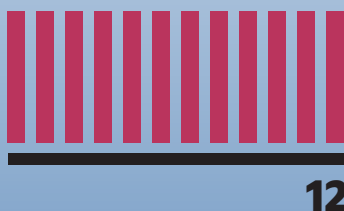


### Major M&A Players in the Security Integration Industry

Number of integrators acquired from January 2017 to October 2019



**Note:** ADS Security was acquired by Vector Security in June 2019



### M&A among Security Integrators Continues

As many have predicted, consolidation among security integration firms has seen a steady and steep rise in the industry – both among commercial and residential businesses – in the past several years.

In one of the largest commercial moves of 2019, Allied Universal – a company known primarily for providing guard services – formed its Allied Universal Technology Services division by first acquiring super-regional security integrator Securadyne Systems, and then acquiring Shetler Security Services of Arizona and Midstate Security of Michigan. With the moves, Allied Universal is looking to become a “one-stop shop” for an end-user’s full security service needs.

“The desire on the part of (Allied Universal) to add these services to their overall portfolio of solutions, as well as the market’s desire and reception to this idea of bundling and creating value in different ways were all compelling to us,” Securadyne founder and CEO Carey Boethel explained.

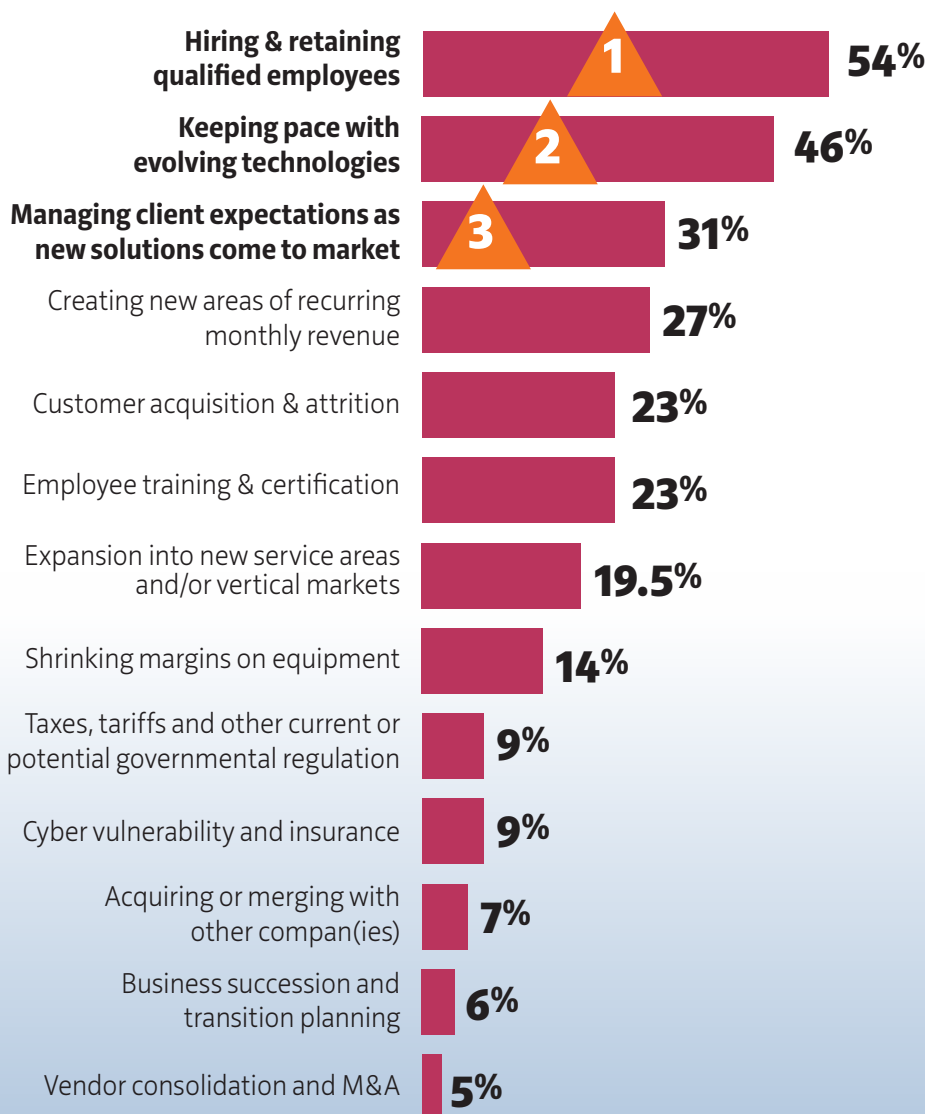
The biggest 2019 move on the residential and small business services side of the industry was Vector Security’s acquisition of Nashville-based ADS Security – which is no stranger to M&A itself, making 13 residential integrator tuck-in acquisitions over the past two years.

“Over the past 16 months, we have recorded faster growth than any other time in company history,” ADS CEO John Cerasuolo said at the time of the Vector acquisition. “We are excited by Vector Security’s financial resources and stable ownership that will continue to fuel our growth ambitions and acquisition activity.”

Looking forward, John Robuck, Managing Director of Security Finance lending within Capital One Bank, told us that “interest remains strong in the security industry from both strategic and financial buyers.”

# Greatest **Business Challenges** for Security Integrators

Respondents were asked what their organization's biggest business challenges have been so far (or expect to face) in 2019. They were asked to select their **top three challenges**; thus, the sum of the choices will not add up to 100%.



## Struggle to Find Qualified Personnel Continues

Several years of security integrator surveys have revealed that businesses are having trouble when it comes to locating, hiring and retaining the top talent necessary to maintain a thriving security installation and maintenance business. That trend continues in 2019.

The problem has become so significant that the Electronic Security Association (ESA) and the Security Industry Association (SIA) launched a joint collaboration and task force in March 2019 to conduct outreach to schools, colleges and universities to increase awareness of the security industry, and to research more on the industry's workforce development challenges and possible solutions.

"The security industry needs to quickly rise above the competition for hiring qualified talent and distinguish itself as a compelling and rewarding source of employment for high school and college students and individuals who are in career transition," SIA CEO Don Erickson said in a statement.

Added Merlin Guilbeau, CEO of ESA: "The skilled labor shortage is reaching a critical point, and we are seeing climbing demand and shortfalls in applicant pools. As an industry, if we don't do something impactful, the long-term impact will be devastating."

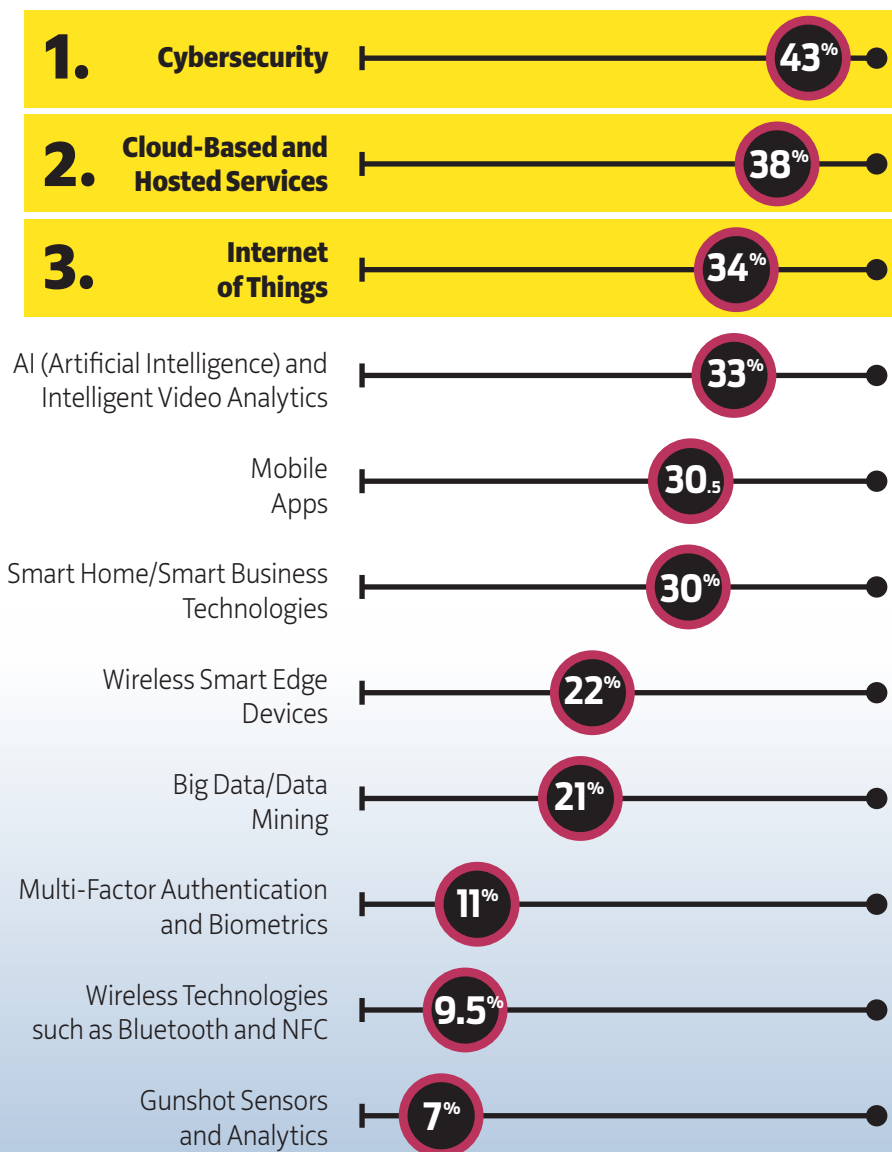
As far as keeping pace with new technologies, integrators who responded to a similar *Security Business* survey in 2019 report they use peer meetings, conventions, conferences, local events and trade magazines as their top-ranked sources to stay informed.

**“With the technological advancements of our industry, the learning curve is steep. It is a challenge to find suitable salespeople/technicians who have the aptitude to understand these advancements.”**

– A New Jersey-based security systems integrator

## Major Technology Disruptors

Respondents were asked what they view as the major and key technology disruptors in the security industry. They were asked to select their **top three disruptors**; thus, the sum of the choices will not add up to 100%.



**“We have been successful with cloud-based solutions. The ability to show cost savings, increased performance, and better reporting/monitoring carries a lot of weight with customers.”**

– A South Carolina-based security integrator

## Artificial Intelligence Technology on the Rise

A disruptor is the kind of technology or need that can revolutionize an industry. For the second year in a row, cybersecurity, cloud/hosted services and the Internet of Things (IoT) are the 1-2-3 disruptors for security integrators.

The technology that saw the biggest rise in this annual question is Artificial Intelligence. With the explosion of AI, deep learning and intelligent video analytics-based marketing, it is no wonder that these technologies are creating much a bigger blip on the radar for integrators (33% this year vs. 22% last year). In the *Security Business* magazine Fast50 poll of integrators, 67% stated they were “confident enough in AI, deep learning and other intelligent video analytics solutions to offer them to all customers.”

Standing atop the poll for the third year in a row is cybersecurity – which is impacting the market in a variety of ways. Most importantly, increased cybersecurity concerns about the networked products themselves has led manufacturers to incorporate and market new built-in cyber protection measures and methods.

Additionally, an increased need for cybersecurity measures across a variety of end-user markets has opened a business opportunity for security integrators, who can provide both managed IT-style services as well as act as a trusted advisor.

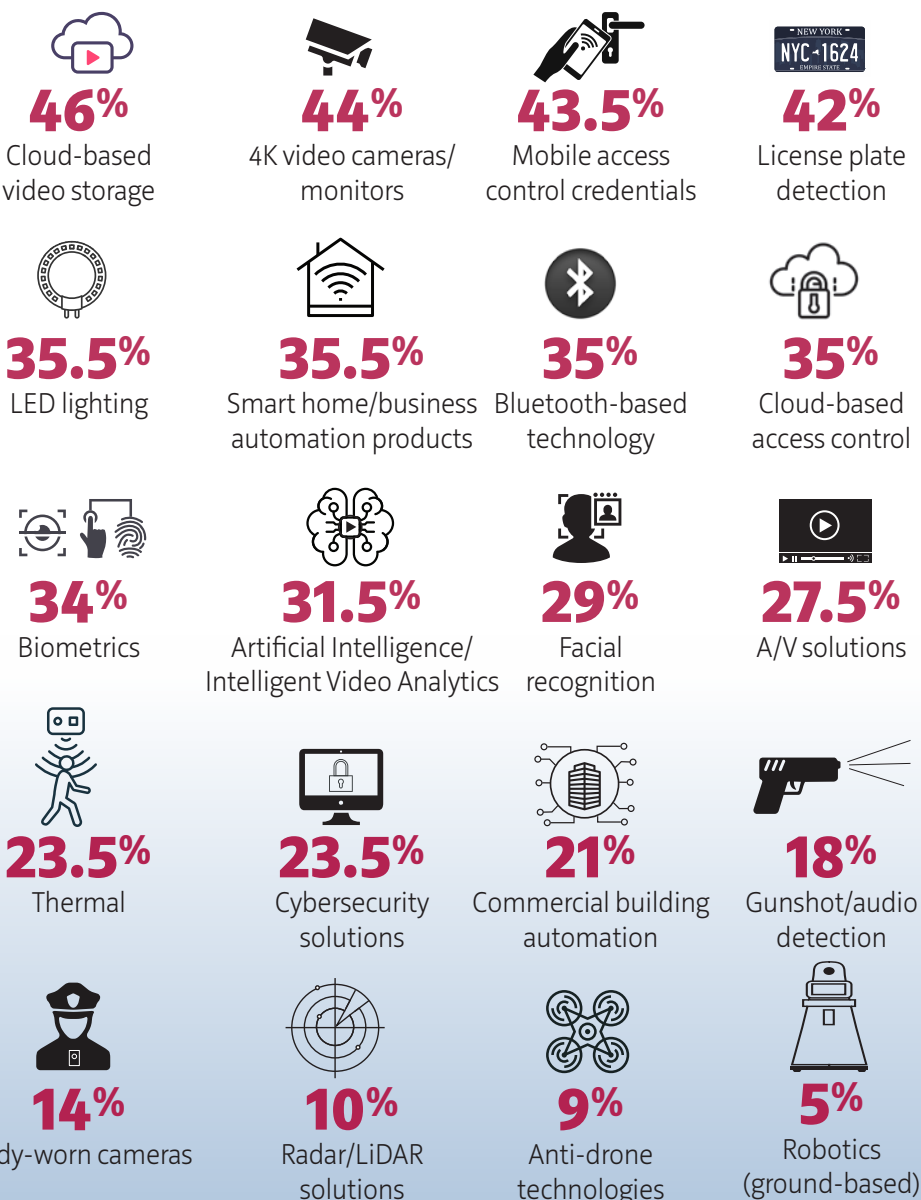
“We partner with manufacturers that are focused on the cyber threats that exist in our industry,” an Indiana-based security integrator told us. “We also work closely with our clients’ IT staff to ensure we are meeting their security requirements and make the recommendation to revisit security during all of our routine audits and inspections.”

“We only use products that are cyber-hardened or include guides, and we implement those procedures,” a Hawaii-based integrator told us.



# Cutting-Edge **Technology** Choices

Respondents were asked which of the following technologies have they **already added** to their service offerings. They were asked to select all that apply; thus, the sum of the choices will not add up to 100%.



## Video Surveillance and Access Control Dominate Industry Innovation

In general, technologies graduate from “bleeding edge” to “cutting edge” when service providers actually begin to add those products to their offerings. In the security industry, that technology vetting process tends to take much more time than it does, for example, in the consumer electronics space.

The list of technologies that integrators report having already added to their offerings reflects this dynamic, as many of them have been around for a while, waiting to gain widespread traction – such as mobile access control credentials, biometrics and 4K video surveillance cameras and monitoring options.

Still, adoption of once bleeding-edge technologies is increasing – and that means that integrators must adapt by further educating their employees and customers.

“The development of security-based technologies coupled with continued education will continue to be a challenge for our business and industry,” one integrator told us. “It is our job as integrators to adapt these products/technologies into our own business strategies. We want our sales staff to be well informed of state-of-the-art technologies, and our ability to train technical staff to be able to successfully install complex solutions is obviously important for the completion of the project.”

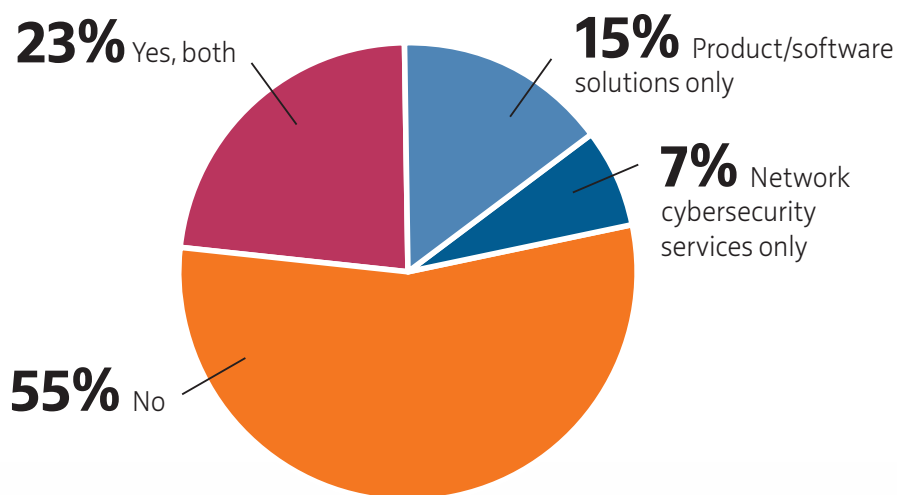
**“ It is all about education for yourself and your team. If you are not learning about AI, the cloud, new chipsets, UHD video, etc., then you are doomed.”**

– A South Carolina-based security systems integrator

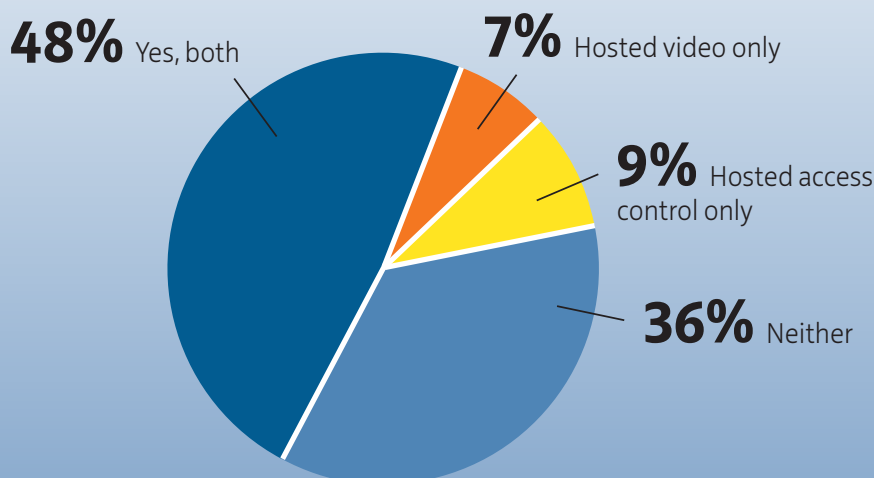
## Impact of Cybersecurity and the Cloud

Respondents were asked the following questions about the impact of cybersecurity and cloud/hosted solutions on their business model:

### Do you offer Cybersecurity products and/or services?



### Is your firm either planning to or currently offering hosted video and/or access control solutions?



### Cybersecurity and the Cloud are Rapidly Changing Integration Business Dynamics

Just as the cloud has reshaped the physical security industry from a technology offerings standpoint, so too has it changed the go-to-market strategy for security integrators. Cloud-based access control, for example, delivers numerous benefits to customers, including making high-tech access control solutions available for organizations who could otherwise not afford that level of performance.

Video Surveillance as a Service (VSaaS) also continues to gain momentum for small businesses and enterprises with multiple small locations, such as franchises and branch offices. The cloud enables end-users to access the video remotely on-demand while taking advantage of the greater security offered by off-site video storage.

Of course, both of these solutions present an opportunity for security integrators to add RMR.

"Hosted and managed solutions have been a great way to bolster our RMR portfolio – something we see as a key component to securing the future of our business," an Ohio-based security integrator told us.

Another reason customers are flocking to cloud-based solutions is because those service providers are better equipped to address evolving cyber threats. "By moving to an as-a-service solution, customers are decreasing the opportunity for cybersecurity threats to sneak in," the Ohio integrator added.

Some security integrators are also migrating to a managed services model that enables them to provide ongoing network and cybersecurity services to customers.

"To remain relevant, we must be able to offer options ranging from monitoring to fully managed and 'as-a-service' models," a New York-based integrator told us.

## Vertical Market Presence

Respondents were asked in which vertical markets do their firms currently have a presence. They were asked to select **all that apply**; thus, the sum of the choices will not add up to 100%.



**62%**

Corporate  
(office buildings,  
campuses & facilities)



**53%**

Retail



**50.5%**

Government/  
Municipal



**50.5%**

Industrial  
(manufacturing, warehouses,  
distribution centers, etc.)



**47%**

Education  
(K-12 and/or college)



**47%**

Healthcare



**39%**

Residential



**35.5%**

Banking and  
Financial



**33%**

Critical Infrastructure  
(including utilities,  
oil & gas, etc.)



**30.5%**

Hospitality  
(hotels/resorts)



**27%**

Entertainment  
Venues & Facilities



**27%**

Transportation



**23%**

Aviation



**22%**

Data Centers



**18%**

Cannabis



**13%**

Gaming



**11%**

Smart Cities

## Among the Usual Security Markets, Cannabis Makes its Debut as a Top Vertical

When we ask security integrators to give advice to their fellow business owners, they often say “don’t try to be everything to everybody” – and they are usually referring to the chart on the left.

Outside of the very largest global systems integrators, most security businesses tend to focus on the 3-5 vertical markets where they have the most experience and expertise.

That means the traditional security-centric vertical markets – corporate, retail, government, education and healthcare – are nearly always in the top five (in varying order) in a survey of security integrators. “Find your niche in the marketplace and dominate it,” as a Virginia-based integrator told us.

Beyond the tried-and-true verticals, a new market is emerging among security integrators, and it is actually debuting for the first time on this survey: the cannabis distribution and cultivation market.

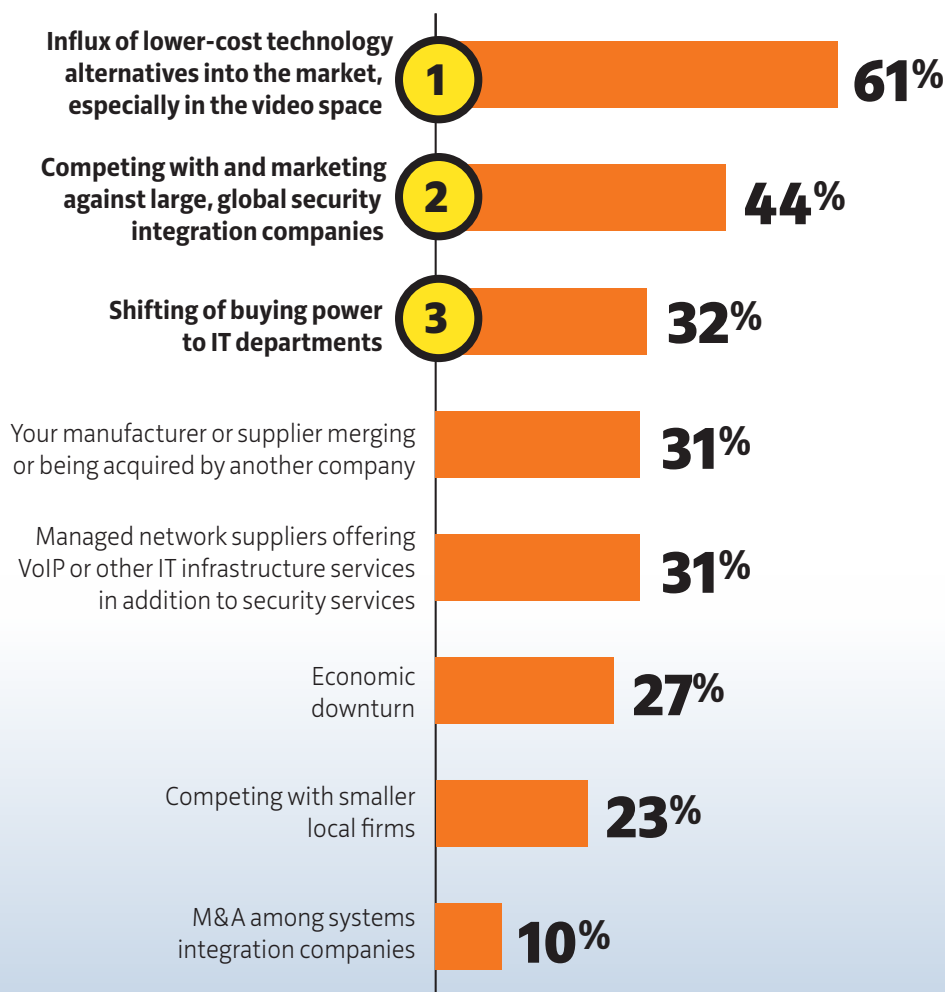
Perhaps no cultural shift has been as bold a harbinger of social change in the last decade as the normalization of cannabis legislation at the state level. The District of Columbia and 11 states – Alaska, California, Colorado, Illinois, Maine, Massachusetts, Michigan, Nevada, Oregon, Vermont and Washington – have legalized marijuana for recreational use. Most other states allow for limited use of medical marijuana under certain circumstances.

According to several industry reports, the cannabis industry will create an estimated \$28-34 billion economic impact this year. By 2022, that could soar past \$75 billion annually.

“When it comes to dispensaries, cultivation and grow facilities, each one of us has their own set of regulations; in fact, we have done deployments in different jurisdictions, and every one has different regulations to meet,” a Maryland-based integrator told us. “There is a heavy security requirement, and a lot of security goes into (the facilities).”

## Identifying Threats to the Commercial Integration Market

Respondents were asked what they expect to be the most impactful commercial threats to security integration businesses. They were asked to select their **top three threats**; thus, the sum of the choices will not add up to 100%.



**“We have moved completely away from the low-price manufacturers who are racing to the bottom. We are not interested in partnerships with end-users or manufacturers who simply operate on price.”**

– A North Carolina-based security systems integrator

### Commercial Integrators Remain Concerned about Low-Cost Tech

Concern over low-cost, lower-margin technologies in the marketplace topped this list of commercial market concerns for the third consecutive year; in fact, this threat has actually gained traction over those years, rising from 57% to 58% to 61% this year.

According to a recent report from research firm Memoori: “Some leading western manufacturers have shown that a quality brand can combat ‘the race to the bottom’ and increase market share and profitability; however, western manufacturers have lost the ‘race for scale.’ It seems there is little appetite for acquiring and merging with other major suppliers to get sufficient scale to bring down unit costs and challenge the Chinese suppliers in the SMB market.”

M&A among manufacturers is also a major concern for commercial integrators. After seeing more than 10 major vendor mergers or acquisitions in 2018, the security manufacturing industry has seen a flurry of M&A activity in the first three quarters of 2019, including the following:

- Bold/EverCommerce
- OpenGate Capital/Sargent & Greenleaf
- ADT/LifeShield
- NSI Industries/Platinum Tools
- ACRE/RS2 Technologies
- Transom Capital/Pelco
- Snap AV/Control4
- Polaris Capital/Panasonic Security
- Motorola/WatchGuard
- Everbridge/NC4
- ASSA ABLOY/LifeSafety Power

“We primarily sell products from one manufacturer, and if they are purchased in the next few years, it could be devastating to our growth,” a Missouri-based security integrator admitted to us.

# Identifying Trends in the Residential Integration Market

Respondents were asked to identify their **top three** most impactful residential threats to security integration businesses; thus, the sum of the choices does not add up to 100%. **Note:** 30 of the 180 respondents reported they have no presence in the residential market and skipped this question.

**DIY offerings, such as SimpliSafe, Ring, etc.**

**Outside players such as Amazon, Google, Apple and Microsoft further penetrating the security industry**

**Upgrading legacy/analog technology among customers**

Bundled options from cable providers

Increasing cybersecurity threats to home systems and IoT devices

Rising cost & complexity of residential and home automation technologies

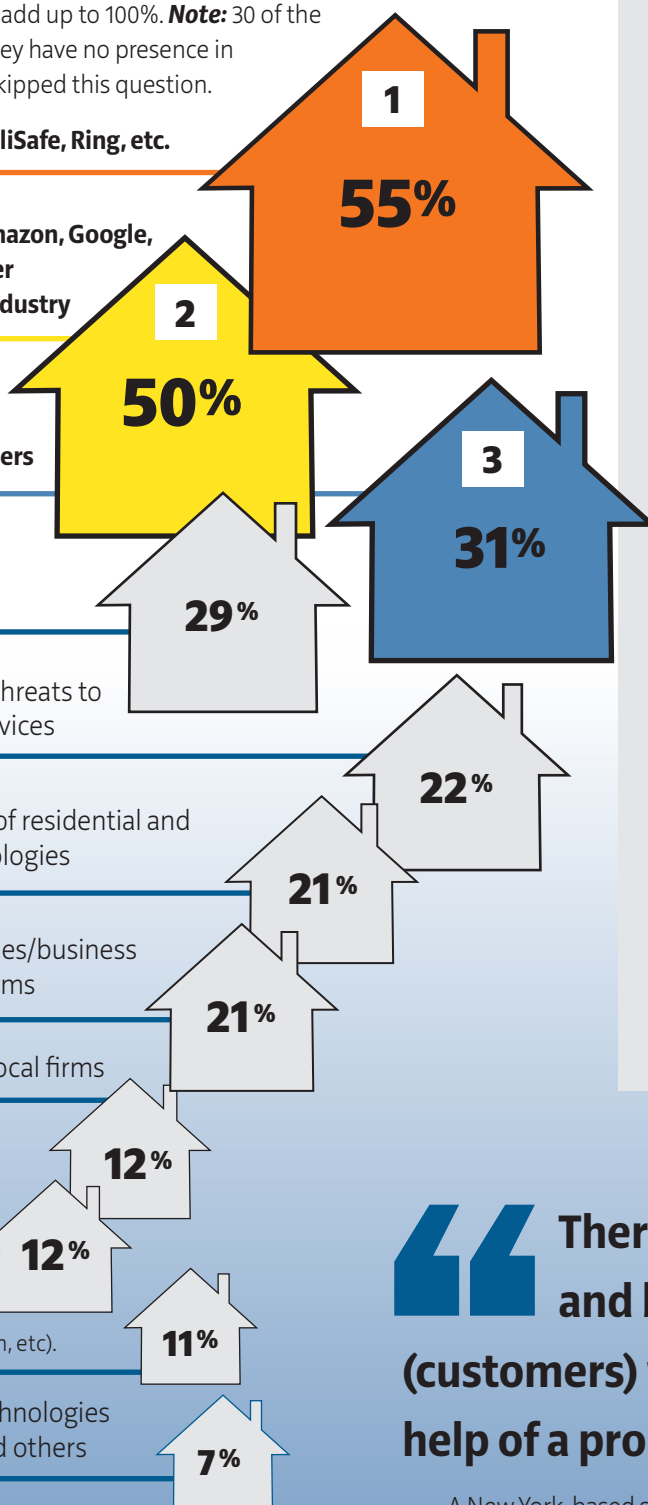
Questionable or illegal sales/business practices of competing firms

Competing with smaller local firms

Helping customers install or repair self-installed technology

Choosing an interactive services partner (i.e. Honeywell, ADT, Alarm.com, etc).

Integrating with voice technologies from Amazon, Google and others



## DIY's Powerful Allies

When one of the most powerful companies in the world (Amazon) acquires a very recognizable and well-marketed Do-it-Yourself security brand name (Ring), it certainly enhances what was already one of the top concerns/threats to residential security integrators.

Since its Feb. 2018 acquisition of Ring (coupled with its Dec. 2017 acquisition of home camera maker Blink), Amazon has released a plethora of DIY home security products, headlined by Ring Alarm, its whole home security ecosystem that includes sensors, alarm, keypad and more.

Ring's latest product, the Ring Retrofit Alarm Kit, is a kit that adds Ring Alarm to an existing alarm panel – essentially a DIY takeover kit for the systems originally installed by either a residential alarm company or the original builder.

To say that Amazon is targeting the customers (and former customers) of traditional residential security companies is probably an understatement.

"Coupled with Amazon's powerful brand and marketing strength, Ring has significant opportunity to convert a slice of the older alarm system market into their long-term security strategy," ESX Conference Chairman George De Marco says.

"This is a tough market, and it is going to get tougher," a Nebraska-based residential integrator told us.

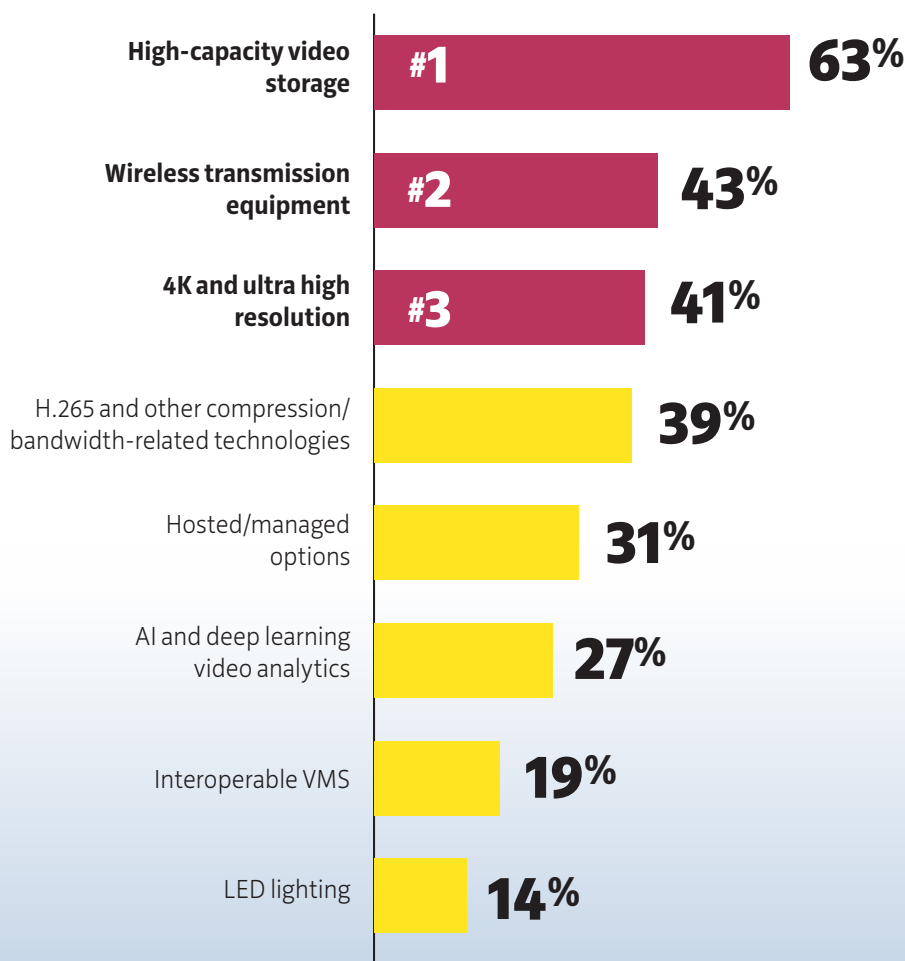
**“There are many pitfalls and brick walls for DIY... (customers) will likely need the help of a pro sooner or later.”**

– A New York-based security integrator



## Key Video Surveillance Technology and Service Enhancements

Respondents were asked what specific video surveillance technology or service enhancements are most important to their business. They were asked to select their **top three**; thus, the sum of the choices will not add up to 100%.



### Video Storage a Major Issue for the Industry

From a video storage solutions perspective, surveillance technology trends like high-resolution cameras, Artificial Intelligence and deep learning, and real-time analytics have produced so much unstructured, raw data that it has changed the game for end-users and integrators who want to deploy those technologies.

Thus, the fact that high-capacity video storage solutions top our list of video surveillance-related technologies that are most important to an integrator's business should come as no surprise – especially when other impactful trends like 4K, ultra-high resolution, H.265 and other bandwidth-related technologies and AI appear on the same list.

"One of the pressing challenges that will continue in 2019 is how, and where, to store all of the data that is being collected," Genetec's Andrew Elvish told SecurityInfoWatch in January. "Given that this is continuing to increase exponentially, manufacturers must focus on providing real solutions to the growing data storage challenge."

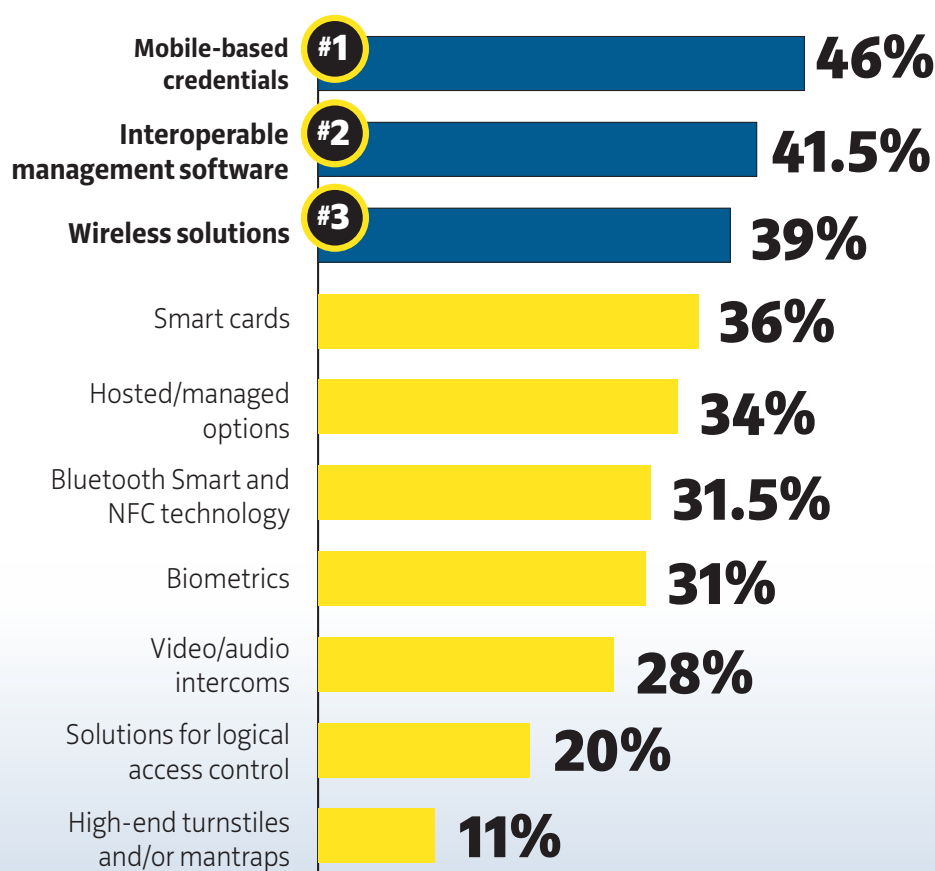
Surveillance-grade hard disk drives (HDD) must be capable of writing data at high speeds to keep up with these AI applications and simultaneously support both AI and video workloads. More processing and storage must be performed at the edge to reduce the burden of raw data storage in the cloud or centralized servers. High-performance video analytics storage and servers must keep up with demand.

**“ Our large enterprise customers have been slower to adapt to cloud-based solutions; however, they have been receptive and quick to adopt to the benefits associated with the use of virtual servers and storage in the cloud.”**

– An Atlanta-based security systems integrator

## Key **Access Control** Technology and Service Enhancements

Respondents were asked what specific access control technology or service enhancements are most important to their business. They were asked to select their **top three**; thus, the sum of the choices will not add up to 100%.



**“ We have ACaaS ( Access Control as a Service) packages that can handle anything from one door at a small church to a whole network of doors across a multi-location organization – all at various support levels depending on the customer’s needs.**

– An Ohio-based security systems integrator

### Mobile and the Cloud: Access Control’s Perfect Match for Integrators

With so many advancements being made in mobile technologies, cloud technologies, Artificial Intelligence, biometrics and wearables, access control is now more integrated with what is considered “state of the art” technology than ever.

“Access control may not be moving at the speed of video by way of development and innovation, but there is a significant shift happening in how access is controlled and achieved – including the rise of biometrics, the development of more wireless locks, an increase in the use of mobile credentials, cloud-based solutions and more open-platform architecture,” ACRE CEO Joe Grillo told SecurityInfoWatch in January.

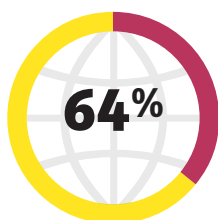
All of these technologies together have enabled integrators to offer enterprise-class access control solutions to customers who, in the past, could not afford such a robust solution.

The mobile credential trend that began as a concept as far back as a decade ago have become ubiquitous in our industry – so much so that integrators cite it as the most important access control-specific technology or service when it comes to their businesses.

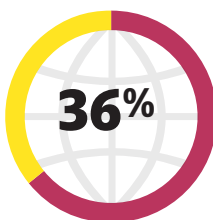
Indeed, mobile credentials have transformed the reader and credential category by enabling security to coexist and add value to other mobile device functionality such as payment and scheduling. Still, like many emerging technologies, adoption in the security industry has been a slow burn. “Mobile has not been widely accepted for opening doors, but it is coming,” AMAG Technology’s Kami Dukes told us. “There is a greater push for migrating to (the Security Industry Association’s) OSDP (protocol) and transitioning from proximity cards to smart cards for secure encryption purposes.”

## Influences on **Product Purchase** and **Recommendation**

**Does a vendor's country of origin affect your decision to buy or recommend a product?**

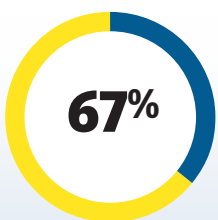


**Yes**

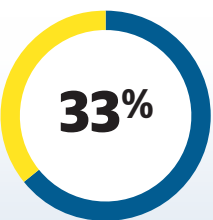


**No**

**Is interoperability of products via a third party (e.g. ONVIF, OSDP, PSIA, etc.) an important consideration when buying or recommending technology?**



**Yes**



**No**

**“The interoperability of products gives clients the best value for their investment, as our industry is continually creating innovative solutions to solve client security and life safety issues.”**

– An Illinois-based integrator told us.

### **Government Rules, Tariffs and Interoperability Impact Buying Decisions**

With new laws, tariffs and other governmental economic intervention, the past year was quite difficult for security integrators to keep a handle on what security technologies were under the government's microscope.

That said, the continued targeting of foreign countries – especially China – for added import fees and government restriction surely had an impact on the buying practices of security integrators; in fact, 64 percent told us that a vendor's country of origin is an important factor in making buying decisions and recommendations.

“We have limited the installs of equipment manufactured by certain foreign entities /manufacturers due to cybersecurity concerns and risks,” an Atlanta-based integrator told us. “It is our policy not to install this type of equipment at federal, state, and local government facilities and make other customers aware of the potential risk.”

Interoperability provided by third parties – such as the Security Industry Association's OSDP (Open Supervised Device Protocol), ONVIF's many profiles, PSIA and others – is also greatly influencing buying decisions and client recommendations for integrators.

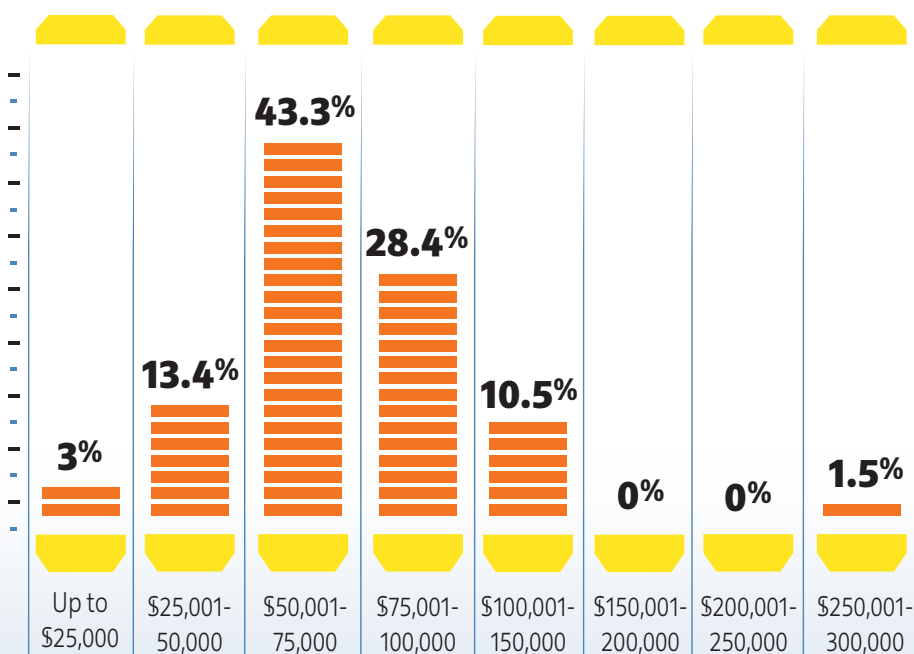
“As technology continues to change and cybersecurity concerns continue to grow, it is imperative to utilize products that can easily interface with each other,” an Illinois-based integrator told us.

Added a New York integrator: “Being able to use different components from different manufacturers makes the impossible more possible.”

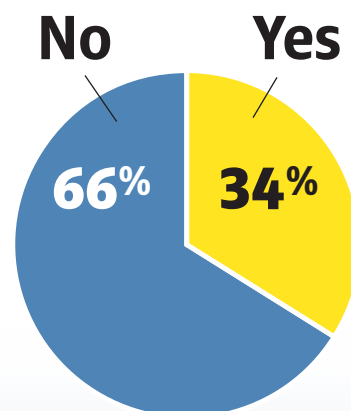
## Sneak Preview: Security Integrator Sales & Technician Salary Survey

Here is a sample of the preliminary results from our exclusive **Security Business magazine 2019 Salary Survey**, where we asked security integration business owners about average salary levels and benefits offered for entry-level and senior level technicians, as well as compensation for salespeople. The valuable information from the full results of this survey are free – all you need to do is provide us with your contact information at the link below.

### What is your typical pay scale for senior-level technicians based at your headquarters?



### Do you offer additional compensation to salespeople based on amount of RMR sold?



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