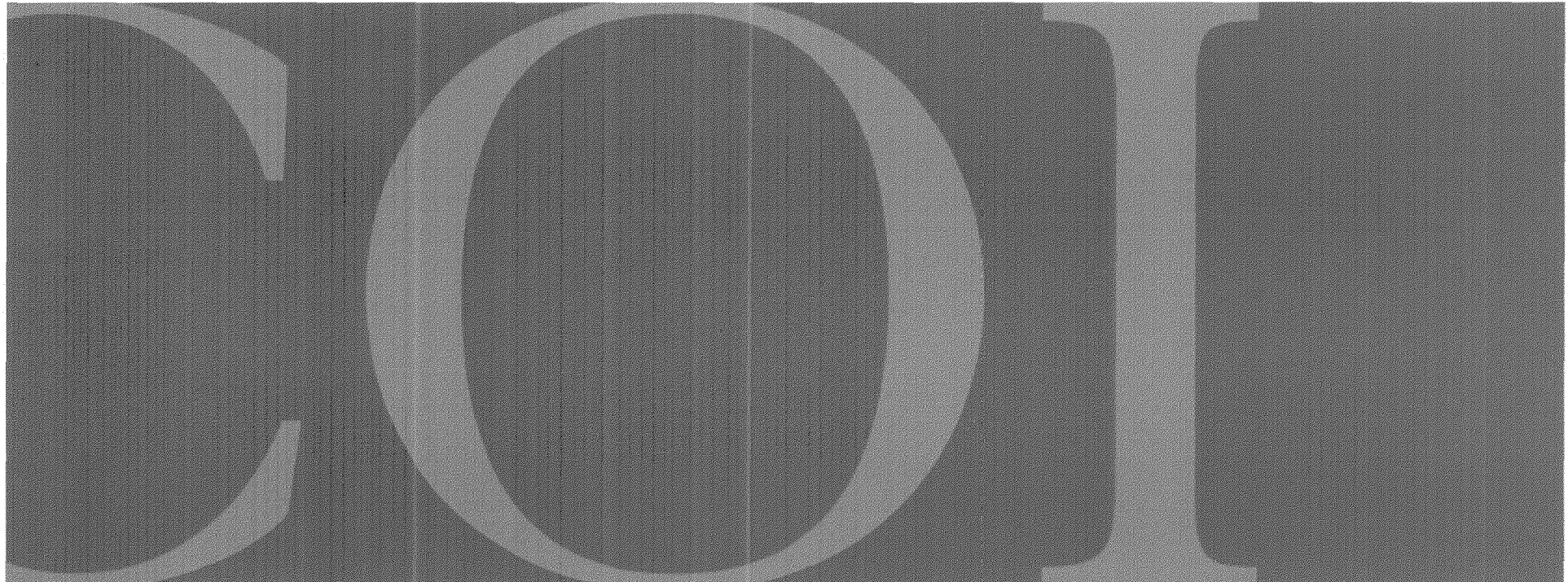


Scoping the Private Investigators Market

David Farrow & Julie Bower

28th April 2010



Objectives

- Scope out the size and shape of the Private Investigation market so that the SIA has an estimate of the number of licenses that are likely to be applied for and issued
- Analysis of:
 - How many firms and companies are operating in this space
 - How many individuals are operating in this space
 - How many employees are there in total
 - What is the geographical and regional breakdown
 - Who are the major players
- Size the market of licensable activities
- Create up to date database
- Establish where investigators are advertising

Methodology

- To develop our database of investigators, we searched the databases below:
 - Association of British Investigators
 - Institute of Professional Investigators
 - World Association of Professional Investigators
 - World Investigators Network
 - World Association of Detectives
 - National Association of Professional Process Servers
 - Yellow Pages
 - Touch Local
 - Find A Detective
 - Search 4 a Private Investigator
 - British Agents
 - United Kingdom Private Investigators Network
 - World Investigator's Network
 - British Services
- Additionally, we looked at classified adverts in a selection of local newspapers from the South East
- This list was cross checked against the main SIA database provided, to assess the degree of overlap
- Our approach and calculations were also informed by interviews with trade associations: the ABI and IPI. The Varsity Publication were also consulted
- It was intended to conduct short interviews with a sample of Private Investigator (PI) firms found, but these were unable to be carried out due to restrictions in the purdah period

The Database

- For each organisation in our database we captured the name of their organisation, any telephone and address details available, website address, number of offices, and the region they were in
- Each entry was then cross checked against the main SIA database of over 1700 entries to understand the degree of overlap

1	Company name	website	contact phone	numbe	Head office location	Region
2	00 Investigations	www.00-investigations.co.uk	01926 866625 07767 067003		Leamington Spa 9 New Hall Lane, Preston, PR1 5NU	West Midlands North West
3	007 Agents		07970 045188		120 Wilton Road Victoria, London SW1V 1JZ	London
4	007 Detective Agency		07010 714 714		Bristol, Avon	South West
5	007 Detectives		07017 410 076 0844 587 0417		15 Finchley Lane Hendon London NW4 1BN	London
6	1 Call Detective Investigation				Harrogate North Yorkshire HG2 8ET England	Yorkshire and Humber
7	14 Almsford Oval				8 Alleyne House Birmingham, West Midlands B24 8EL Birmingham	West Midlands
8	1st Action Investigations		0121 240 1925/ 0121 448 5282		Birmingham	West Midlands
9	1st Action Services		0121 240 1925		Birmingham	West Midlands
10	1st Call Detective		07017758235		3 Alfriston Berrylands Road, Surbiton, KT5 8RB	South East
11	1st Call Detective		07017758304		1 Cavendish Parade, Bath Road, Hounslow, TW4 7DJ	South East
12	1st Call Detective		07017758292		142 Clock Tower Road, Isleworth, TW7 6DT	South East
13	1st Call Detective		07010 025122		2-8 James Street, Liverpool, L2 7PG	North West
14	1st Call Detectives		07010 025121		Bridge House, 1-2 Riverside Drive, Aberdeen, AB11 7LH	Scotland
15	1st Call Investigations	http://www.1stcallprivateinvestig	01772 780147		PO Box 655, Preston, Lancashire PR3 3XZ	North West
16	1st Call Private Detectives	http://www.1stcalldetectives.co.uk	0112 3460 099		White Rose House, 26a, York Place, Leeds, West Yorkshire LS1 2EZ	North East

The scope of the Private Investigation market

- The total number of Private Investigation Organisations we found is 2766. Including multiple offices, this total is 2986
- Of these, 356 were also on the smaller supplied SIA database
- We have used this to size the market based on probable, possible and potential future assessment of the number of investigators each organisation hires

Probable = 1-2	$1.5 \times 2986 = 4479$
Possible = 3-4	$3.5 \times 2986 = 10,451$
Potential = 5-6	$5.5 \times 2986 = 16,423$

This gives us a market size ranging from 4400 to 17,000

Caveats

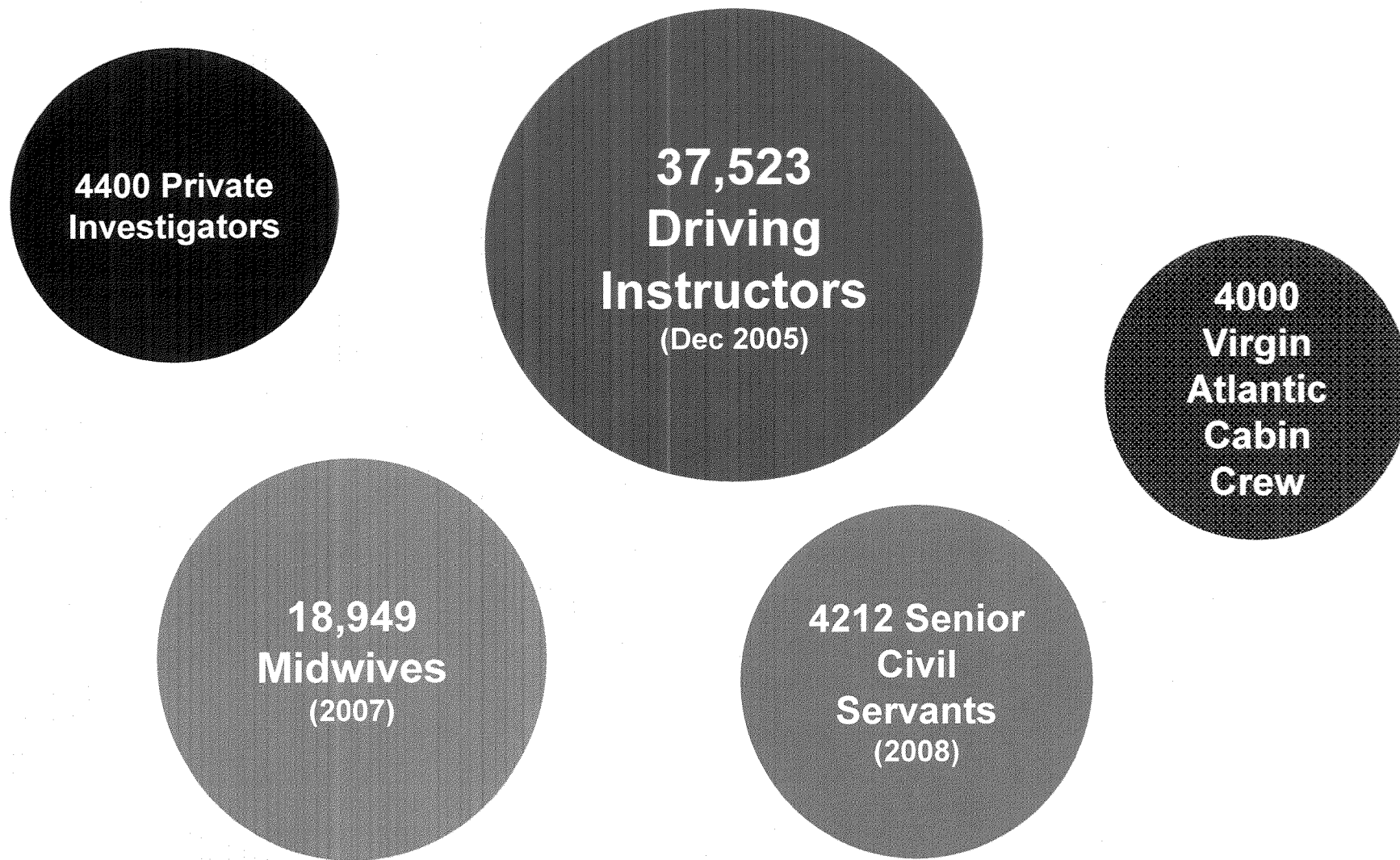
Our sizing may be underestimating the market...

- What we found isn't necessarily comprehensive – we could have continued searching and expanding the database
- There may be 'under the radar' PIs who aren't searchable in public domain. However, the trade associations estimate this to be a very small number
- There was limited overlap with the main SIA database and the one we created. However, within the SIA database there appeared to be many organisations with multiple listings:
 - One phone number has 474 separate organisation listings, and one with 155
 - 10 individuals names are listed for 262 organisations

Our sizing may be overestimating the market...

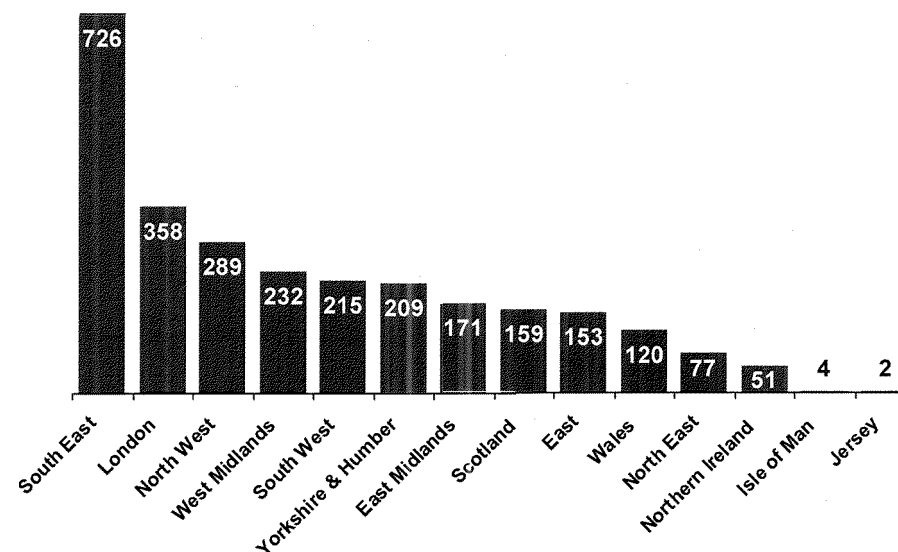
- People dip in and out – may only do e.g. 1 investigation a year, so wouldn't necessarily go ahead with licensing...
- One organisation may have multiple listings
- There may be PIs who do investigative work for multiple organisations

The size of the PI market in context...



The shape/composition of the market

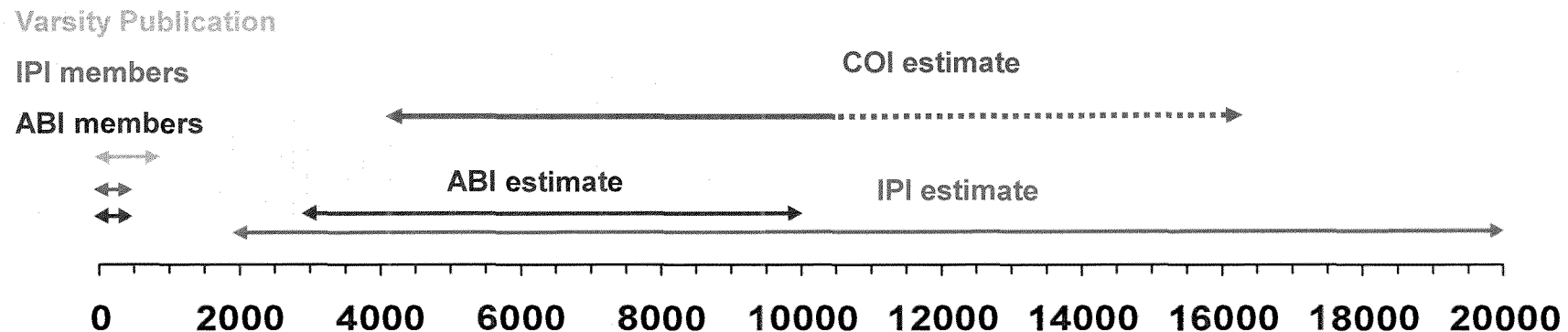
- The bulk of the Private Investigation organisations we found were in London and the South East (39%)
- Other hubs for PIs tend to be urban centres including Manchester and Birmingham
- Out of all the local papers in London and the South East reviewed, only one PI advertisement was found. This demonstrates that advertisement is primarily online or, as in the example of yell.com, available in paper and online versions
- The prevalence of online advertising means that many online listings may be out of date



Number of organisations in our database by region. Those with multiple offices within a region are only counted once

Trade Associations & Market Size

- The ABI is the largest PI trade association. It has 450 members according to the ABI president. This number is 555 in their online directory, which may be due to some members who are listed under multiple addresses
- The IPI is the second largest. It has 380-400 members according to the IPI Secretary General. When interviewed, the IPI Secretary General quoted the ABI membership to be far higher than it is at 800+ members
- WAPI is the third largest organisation with 86 members
- It is common for companies to be members of more than one or all of these trade associations at once
- The Varsity Publication is the definitive PI paper directory. However this source has become much less used in the past ten years because of the internet. This seems to be confirmed by the Varsity Publication's Managing Editor who says only 1000 PI individual offices are open. However, there is a cost involved in being listed in the Varsity Publication and it may be that interest associated with this format is shrinking
- The ABI estimates the total market of PIs to be between 3000 -10,000, while the IPI estimate it to be between 2,000 - 20,000




Market movements & patterns

- It is believed by ABI, IPI and Varsity Publication that the number of PIs is fairly static but shrinking. Various reasons are cited for this, including a lack of work, organisations slimming down, investigators retiring and businesses merging or folding
- Recession is usually a boom time for PIs because of foreclosures. However this recession has seen less of this activity than the preceding one did
- Cross-agency help is heavily relied upon. Both trade associations interviewed believe that the claims of small companies to have nationwide coverage and access to multiple branches and operatives amounts to nothing more than noise
- Accreditation to the ABI and IPI is of an individual, not of a company. However, this is often not respected by their members. Their membership is considerably smaller than the actual market size not only because the vast majority are unaccredited but because in an individual company, often only the principal is accredited
- The ABI have devised ways of growing the prestige of being an association member. This includes having negotiated exclusive access to the DVLA electronic database for their members. The ABI also consistently works to win the confidence of the police and mutually aid investigations in that way. Membership to the ABI thus represents more privileges and business potential than only a credibility check
- Both the ABI and IPI believe that there are a minimal number of investigators coming in from abroad

Private Investigation Activities

- The president of the ABI estimates that there are up to 100 different kinds of PI activity
- The main areas of investigation are due diligence, surveillance and counter-surveillance, people tracing, process serving, debt recovery, background checks, status reports, credit checks, corporate and fraud investigations and security consultancy.
- A high proportion of PI work is for corporate rather than private clients
- Surveillance of teenagers is a growing market particularly in Asian communities
- A lot of PIs have their own website, sometimes disclosing the company address(es) and / or the company's main investigator

Case Studies – Adams Investigations



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We draw on many years experience to give you the best possible service.

✓ **Tracing**
Trying to locate a person? Our tracing service is professional and discreet.


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Adams Investigations are experts in surveillance and counter surveillance.

“We have used Adams Investigations many times for process serving work. The instructions have always been dealt with promptly and efficiently and on a very cost effective basis”

Adams investigations is a nationally networked private investigation company, with extensive experience in the field, whose watchwords are efficiency & discretion.

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Call us today on 01233 645658 or 07787 555932.



Our Services

- ✓ Process serving
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- ✓ Matrimonial & personal matters
- ✓ Observations report
- ✓ Surveillance services
- ✓ Insurance investigations
- ✓ General search enquiries
- ✓ Accident statements & reports
- ✓ Locus reports
- ✓ Confidential means interviews

[More investigative services](#)

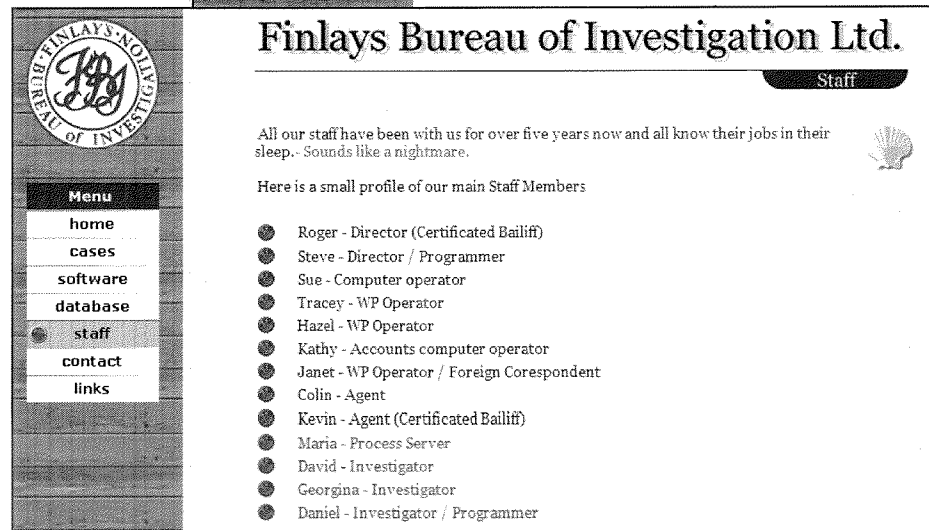
- Specialist in surveillance
- Offer investigative services to individuals and the legal profession
- Based in Ashford – no apparent other offices
- Member of ABI

Case Studies – Finlays Bureau of Investigation

- Based in London
- Claim to have 1600 agents nationwide and is building a searchable database of these
- Site lists 13 staff members many of whom are not investigators but may carry out licensable activities



The screenshot shows the home page of the Finlays Bureau of Investigation Ltd. website. The page features a logo on the left with the text 'FINLAY'S BUREAU OF INVESTIGATION' and a stylized 'FBI' monogram. Below the logo is a 'Menu' with links to 'home', 'cases', 'software', 'database', 'staff', 'contact', and 'links'. The main content area has the title 'Finlays Bureau of Investigation Ltd.' and a 'Home' button. Below the title is an image of an open book or document. The text on the page reads: 'Worldwide - Over 6500 Agents', 'Finlays have been trading since 1930. We like to think that we have one of the best reputations in the world for integrity and professionalism.', and 'We mainly cover Process Serving and Tracing, together with On-line Company Searches, Observations, Credit Checking, Accident Cases, etc. We are also Certificated Bailiffs and are more than happy to help with Rent Arrears.'



The screenshot shows the staff page of the Finlays Bureau of Investigation Ltd. website. The page features the same logo as the home page. Below the logo is a 'Menu' with links to 'home', 'cases', 'software', 'database', 'staff', 'contact', and 'links'. The main content area has the title 'Finlays Bureau of Investigation Ltd.' and a 'Staff' button. Below the title is a paragraph: 'All our staff have been with us for over five years now and all know their jobs in their sleep.- Sounds like a nightmare.' followed by a small shell icon. Below this is the text 'Here is a small profile of our main Staff Members' and a list of 13 staff members with their roles:

- Roger - Director (Certificated Bailiff)
- Steve - Director / Programmer
- Sue - Computer operator
- Tracey - WP Operator
- Hazel - WP Operator
- Kathy - Accounts computer operator
- Janet - WP Operator / Foreign Correspondent
- Colin - Agent
- Kevin - Agent (Certificated Bailiff)
- Maria - Process Server
- David - Investigator
- Georgina - Investigator
- Daniel - Investigator / Programmer

Case Studies – BTG Intelligence

The screenshot shows the BTG Intelligence website homepage. At the top left is the BTG Intelligence logo. To its right is a search bar labeled "Search the site". Further right are links for "Contact Us", "Find People", and "Group Services". Below the logo is a navigation menu with items: Home, About Us, Our Services, Our People, Recent Cases, News Centre, Careers, and Back to Group site. The main banner features a large "STOP" sign on the left and the text "Because information is everything, we stop at nothing." followed by "Our investigators and intelligence professionals stop at nothing to bring you the vital information you need, exactly when you need it." Below the banner are three columns of content. The left column has "Quick Links" (Investigations, Intelligence, FAQs) and "Featured Publications" (Anti-Money Laundering, Terms of Business, BTG Intelligence Key Contacts, View all). The middle column is titled "Specialists in corporate investigations and the provision of high-quality intelligence" and describes their global expertise. The right column is titled "Contact us" with a phone number +44 (0)845 678 2905 and links to "Find your local office" and "Contact form". Below that is a "UK Office Locations" section with a map of the UK and a "View locations map" link. At the bottom, there is a section for "Global resources, local specialists" and a closing statement: "Wherever your business is incorporated, wherever you trade, wherever you merge, acquire or partner- BTG Intelligence is able to support you - consulting and".

- Based in Manchester
- 47 UK office locations
- The Begbies Traynor group conducts corporate investigations only
- Recent work includes covert surveillance on a Managing Director resulting from board level concerns he was breaching his fiduciary duties

Case Studies – Kroll

- 4 UK offices but mainly based in the US. 55 offices in 27 countries
- Unaccredited to any UK trade association
- Kroll has approximately 3000 employees worldwide, including over 300 consultants in their Investigations, Financial Advisory & Intelligence practice, but the bulk of these are likely to be in the US
- Huge, multinational and corporate PI firm whose functions have expanded over 30 years of practice into consultancy and general risk mitigation
- Claims it has governments and celebrities as part of its client base and offers a 24 hour international service

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Instead of pulling public records exclusively from online databases, Kroll researchers review courthouse records and other primary sources to ensure we gather the most timely information.

Latest Headlines

New Multidisciplinary Task Force at Kroll Helps Clients Respond Immediately to Data Loss or Theft
Kroll's Data Breach Services team uniquely combines Kroll's expertise in investigative fact finding, information security, computer forensics, and identity theft monitoring, and, when identity theft occurs, consumer consultation and identity restoration. (April 20) [Read more.](#)

Report: New Enforcement Efforts Raise the Stakes in Global Fight Against Corruption
The tide has changed in the global fight against corruption, as regulatory agencies take a more aggressive approach to investigating violations and raise the penalties for abuses, according to the latest edition of the Kroll Global Fraud Report. (April 19) [Read more.](#)

Report: Healthcare Industry Continues to Overlook Gaps in Data Security
Despite new statutory and regulatory requirements for healthcare privacy and security, a new survey of U.S. healthcare organizations from Kroll and HIMSS suggests that while organizations are updating their security environments, data continues to be at risk. (April 5) [Press Release](#) | [Download the Report](#)

Kroll Ontrack Survey Reveals Litigation Hold and Automated Document Retention Functionality Are Key Drivers in Information Management Decisions
Nearly 63 percent of corporate legal, compliance and IT professionals surveyed by LegalTech's New York 2018 claim that inadequate technology and resources are biggest barriers to managing electronically stored information. (March 16) [Read more.](#)

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The latest edition of the Kroll Global Fraud Report examines the dramatic impact of increased regulation and enforcement on companies around the world. The Report highlights expanded efforts by the Department of Justice and the Securities Exchange Commission to increase compliance with the Foreign Corrupt Practices Act.

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Investigations, Financial Advisory & Intelligence

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Kroll understands the complexity and fast changing nature of your business. We combine our capabilities – from forensic accounting, computer forensics, through to litigation support and testimony – to create a purpose built solution to your litigation and forensic requirements.

How We Can Help
Kroll is a global leader in forensics. For over 30 years, we have helped clients uncover fraud, recover data and assets, and manage financial threats. We assist legal and corporate teams in mitigating risks and financial loss through:

- detection and prevention of fraud
- protection and recovery of assets
- reputable testimony or evidence in cases of litigation
- discovering hidden or concealed data

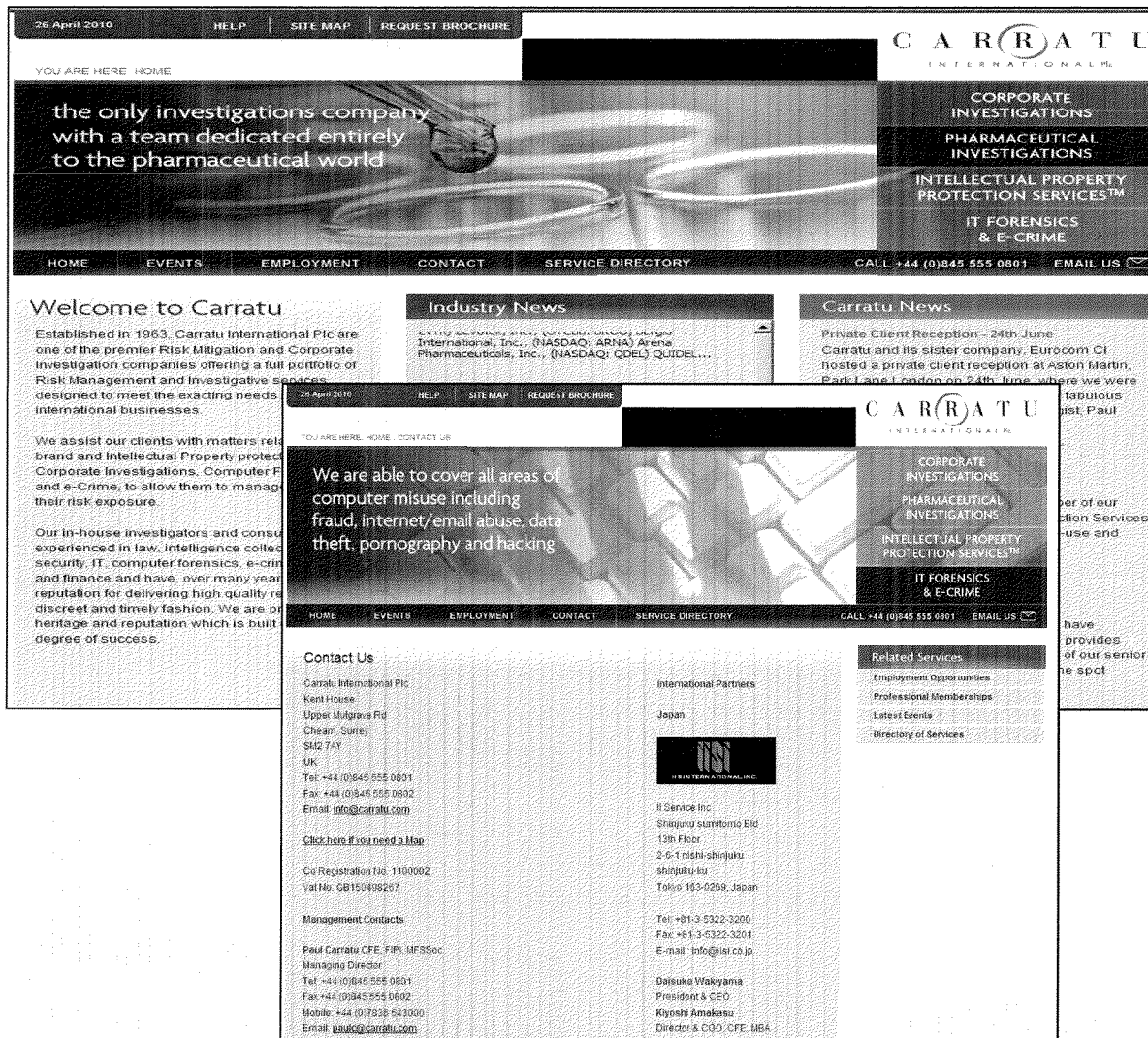
Kroll's methods of investigation can stand up to rigorous judicial scrutiny, giving you peace of mind in complex legal disputes. We help protect your organisation from financial damage as well as damage to your company's reputation. For further details on how Kroll's services can help your organisation, click to read more about our services below.

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Case Studies – Carratu



- Based in Surrey
- Managing Director is Paul Carratu. Company active since 1963.
- Member of a large number of associations including:
 - IPI - which the website incorrectly claims is the largest member organisation of its kind in the UK
 - The Association of Certified Fraud Examiners (ACFE)
 - The World Association of Detectives (WAD)
 - Marques, the Association of European Trade Mark Owners
 - The Forensic Science Society

Case Studies – Jack Russell

- A freephone service with no names supplied
- Opened a new office in Manchester in October 2009
- Claims to have a network of UK offices
- Claims to have a long track record with 25 years of professional debt recovery experience

The screenshot displays the website for Jack Russell – Collections & Legal Process Servers Agency. At the top, a banner reads "Debt recovery with a terrier-like approach" and provides the freephone number 0800 068 5151. Below this is a navigation menu with links for Home, About Us, Collecting Debts, Avoiding Debt, News, Pay a Debt, Links, and Contact. The main heading is "Jack Russell – Collections & Legal Process Servers Agency". A large image of a Jack Russell Terrier dog is featured on the left. To the right of the dog, the text states: "Debt Collection Agency, Jack Russell, is the UK's prominent debt recovery service. Its network of UK offices ensures the most difficult of debts, are rapidly recovered. If you require an affordable, professional, debt collection agency that delivers unrivalled results, then freephone 0800 068 5151 now, and inject your cashflow today!". Below the dog image, there is a section titled "Express Debt Recovery" with a sub-heading "A formal legal demand hand delivered to the debtors within 7 days on undisputed debts over £3k ... read more". To the right of this section is a list titled "Who Can We Help?" which includes a wide range of industries such as Accountants, Banks, Building Societies, Charities, and many others. Further down the page, there is a "Latest News" section with a sub-heading "Meet Us To Discuss & Resolve Your Bad Debt Recovery Issues" and a brief announcement about a new Manchester office opening in October 2009.

Case Studies – Honeytrap Agency

HONEYTRAPAGENCY 



- Home
- HoneyTrap
- Honeys Required
- Matrimonial Investigations
- Surveillance Services
- Private Investigator
- Contact



UK HONEYTRAP SERVICES
WE HAVE A VAST NUMBER OF
ATTRACTIVE AGENTS TO TEST
YOUR PARTNERS FIDELITY



WELCOME TO THE HONEYTRAP AGENCY

If you are having doubts about your partners fidelity, have there been sudden recent changes in behaviour? are you about to take the next step in a relationship and are concerned that your partner may be unfaithful to you?

A carefully arranged honey trap by one of our experienced agents will answer all your questions and can either help to set your mind at ease or else give you the knowledge you need to move on.



We can arrange for one of our attractive honey trap agents to approach your partner at a pre arranged time and place and start a conversation with them, eventually leading up to attempting to make a future date and obtain contact information from them.

If your partner should agree to a future date then our agent can attend and document the events. This is to ensure that if your partner does agree to a date with our honey trap agent you will know whether their intentions were to attend that date or not. Your partner may well reject the attempt and so your concerns about their fidelity can be safely laid to rest.

We understand that it may be difficult making the first step toward contacting us, please be assured that we are friendly and approachable, and treat all enquiries with complete discretion, understanding and respect.



If you have suspicions about you partner but do not think a honey trap is the correct approach to investigate their infidelity then we can still help. We also operate a range of

- Contact address is in Worcestershire
- ‘A number’ of Male and Female investigators offering:
 - Finding Missing Persons
 - Covert Surveillance Operations
 - Honey Trap Assignments
 - Vehicle Tracking Systems [GPS]
 - Prenuptial Investigations
 - Background Reports
 - Process Serving

Views on licensing

- Interviews with the ABI and IPI yielded varied opinions on licensing
- Both trade associations are in favour of licensing to rein in unscrupulous operators, but they stand to benefit if licensing does not go ahead as membership of their organisations remains the only available accreditation
- Private Investigation is often picked up in middle age as a second career by retired police officers. Those who carry out the occasional investigation out of interest or for pin money are likely to be discouraged by the introduction of licensing
- PIs are most often self employed and not used to participating in CPD and training. Big egos might also prevent these PIs from operating as a licensed PI as the requirements may not sit well with them
- The question of who in the workplace should be licensed has been raised by one trade association. Every person in a PI office is likely to handle investigative work and sensitive data on some level, even if they are not an investigator
- There is frustration among PIs and the trade associations at the lack of resolution on licensing and a feeling that this process has dragged on and is losing credibility. One expert said that a no-competency qualification for a license would answer the question of how many PIs there are at once, but commented that it seems too late for that now
- Several larger PI websites post updates and views on licensing plans

Views on licensing – PI Franchises



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You are here: News > Licensing Update

Licensing - an Update

My earlier "blog" was in real anticipation of the SIA bringing in licensing for the "private investigation" business. They have just announced that this will not happen before 2012. The reason that they give is that there are other priorities and that the sector poses no "threat" to the public. With recent exposés of MP expenses maybe the licensing eye needs to fall elsewhere.

This is an unusual move by Government bodies who seem keen to make the life of those in the "private investigation" business more and more difficult. They have been doing this by removing access or allowing "privacy" issues to dominate the rights of businesses and individuals to protect themselves or seek redress from those willing abuse the system.

Of course the "private investigation" business is a very wide ranging business from those who sit and watch, through process servers (who are in effect postmen), through to data researchers and specialist forensic and anti-espionage trades. Not to mention those who are likely to be brought in such as debt counsellors, and asset recovery agents. The whole "private investigation" business is just too big an area for a simple licence to cover. Many areas are all ready covered of course by the all invading Data Protection Act and Consumer Credit Licence. Sitting these beside are the Office of Fair Trading and Information Commissioners Office who keep a closer eye on the "private investigation" business than most others ----- it seems to me.

Contact our Head Office
0800 310 1922
head.office@davicoleman.com
or ask for a "Call Back"

csa?

Opinion varies from those who feel that Private Investigation is too big an area for licenses to cover and that there is already much regulation in place, and those who are positive about regulation and licensing from the SIA

Bluemoon Agencies:

The position so far

The Security Industry Authority (SIA) are developing the approach to the licensing of private investigation activities. The Security Industry Authority is the organisation responsible for regulating the private security industry.

During 2005 and 2006 they consulted extensively with individuals and representatives working within private investigation on the possible approaches for licensing.

The options for licensing were presented by the Home Office in a partial Regulatory Impact Assessment in August 2007. Individuals and organisations with an interest in this sector had an opportunity to respond with their comments. The responses to the consultation were published by the Home Office in May 2008.

Following the Home Office's recommendation to introduce competency-based licensing, an interim version of the Impact Assessment confirming the intention to develop the regulation was published in September 2008.

An announcement is expected by April 2009 on the licensing criteria and licensing timetable.

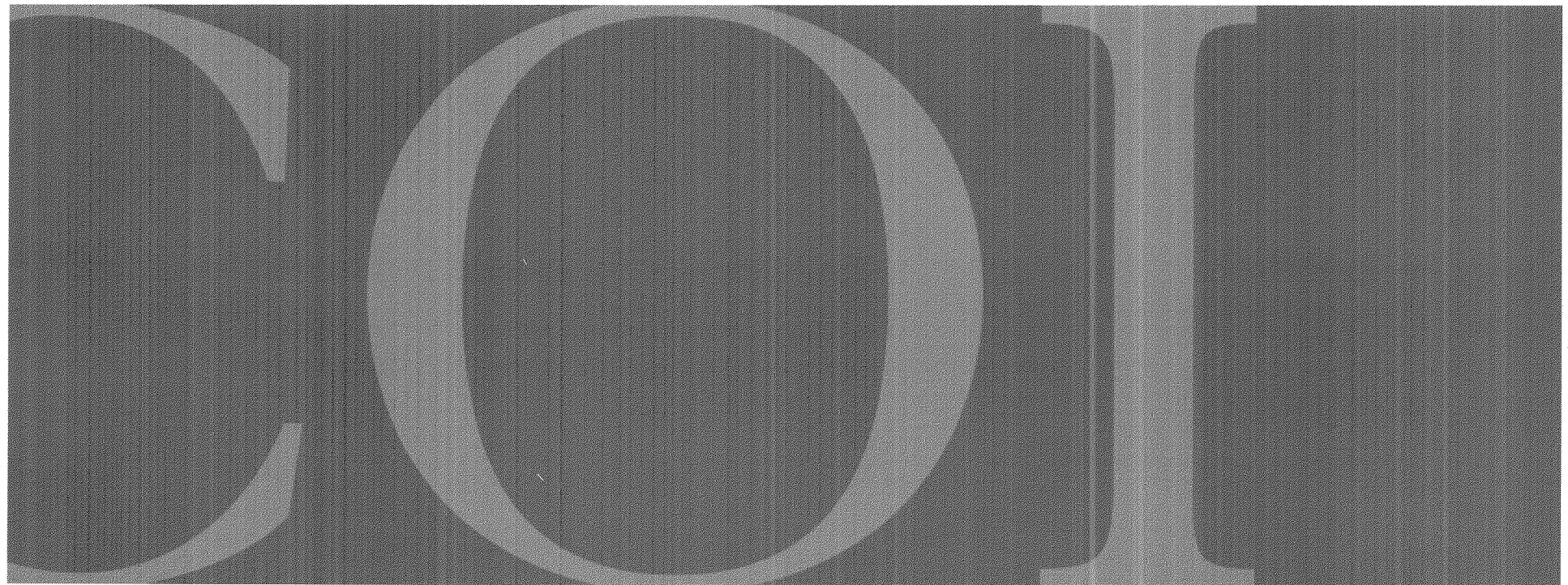
Regulation will be a good thing in the long term. It will eventually put the Sector on the road to become a profession and capture all Operatives undertaking licensable activities, regardless of job title.

Conclusions

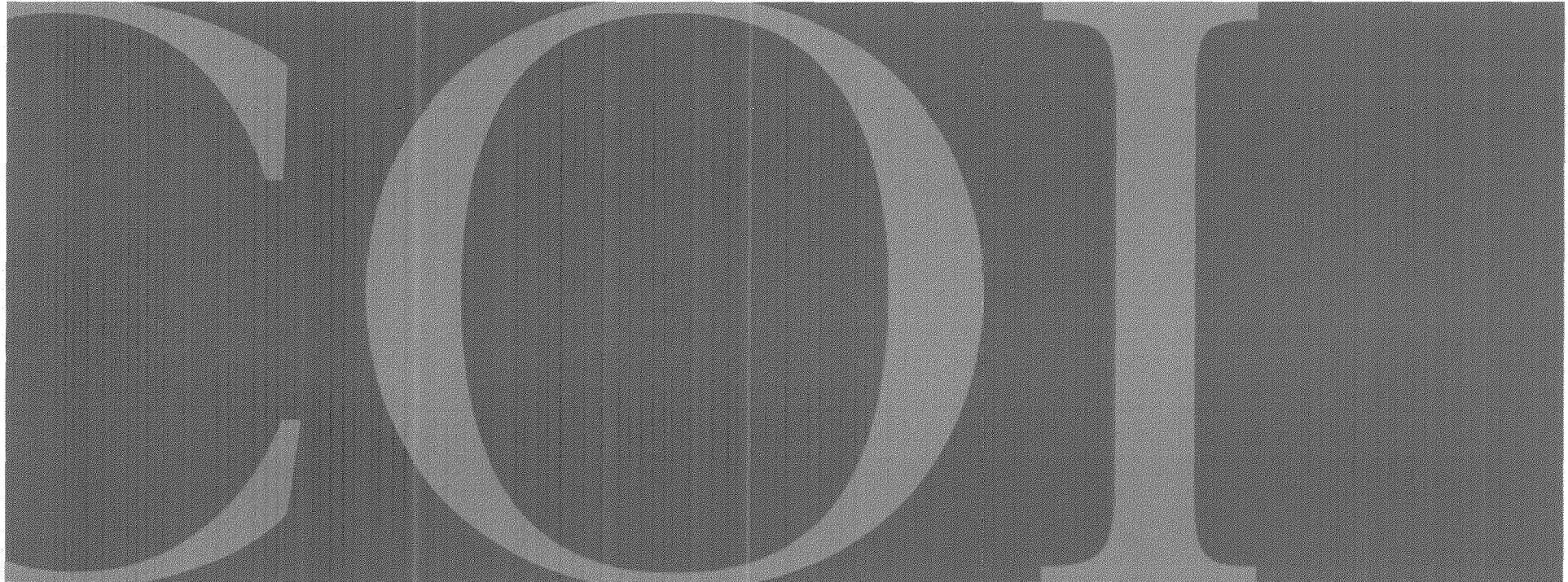
- The estimated size of the private investigation market is around 4000-6000 investigators
- However, it will always be difficult to have an exact figure due to the fluctuating nature of the market and the staffing claims private investigators make
- There is stretch potential in the market with it seemingly likely that the market will grow if the economy worsens as credit collection services are central to the sector
- The PI market is chaotic, randomised and diffuse with contact information often being historic and obsolete, increasing the difficulty of gaining an accurate picture of the market

Thank You

David Farrow & Julie Bower
28th April 2010



Appendix



Local Newspapers – South East

- The following publications from w/c 5th April were reviewed for classified advertisements for private investigators:
 - Metro
 - Farnham Herald
 - Lewisham & Catford News Shopper
 - Kilburn Times
 - Hounslow Brentford Times
 - Newham Recorder
 - Londra – London Turkish Gazette
 - The Croydon Borough Post
 - The Medway Messenger
 - Fulham & Hammersmith Chronicle
 - The Portsmouth News
 - Oxford Mail
 - Hampshire Chronicle