



*Securing  
UK advantage*

# **SECURITY & RESILIENCE SECTOR** UK OUTLOOK **2024**

# THE UK SECURITY AND RESILIENCE SECTOR

faces a dynamic year ahead in 2024, shaped by a shifting domestic policy agenda, rapid technological change, as well as new and emerging international security challenges.

Turnover in UK security and resilience reached:

£**23.4**BN  
IN 2023

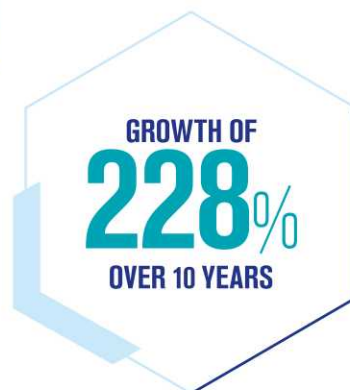
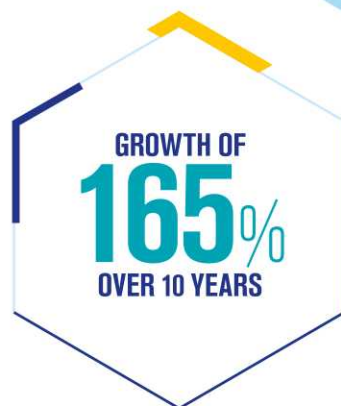
GROWTH OF  
**189%**  
BETWEEN  
2013 & 2023

**This report sets out the continued growth aspirations and opportunities ahead for the UK security and resilience sector, which is well positioned to succeed at home and overseas.**

Ongoing inflationary and budgetary pressures on governments and businesses alike are creating pressures on public and private sector expenditure on security. The sector's ultimate trajectory will be shaped by how it responds to challenges and opportunities in the digital sphere, the physical world, and the UK's international partnerships.

All 2023 data points are estimates by Oxford Economics and ADS.

In 2023, the economic footprint of the UK security and resilience sector includes:



# UK ADVANTAGE IN THE SECURITY AND RESILIENCE SECTOR REQUIRES A FOCUS ON...

## A Digital World

The UK's increasingly digitalised economy has been accompanied by a **surge in ransomware** led by organised crime groups, threatening the fabric of the online commons. The UK's response has been multifaceted, with an increasing focus on public-private partnership with the UK's world-class cyber security sector.

As the digital and physical realms increasingly intertwine, the **cybersecurity of critical national infrastructure (CNI)** has emerged as a paramount concern. Advanced cybersecurity solutions are called for to shield the nation's vital services from cyber threats and in 2024 the UK's cyber resilience will depend heavily on increased collaboration between the sector and government.

The growth in the use of artificial intelligence (AI) across all spheres of life will pose ever more questions for society. **AI in national security and public safety** offers unprecedented capabilities for threat detection and response while also igniting debates on error and bias. A balanced approach that fosters innovation without compromising privacy is called for.



## The Physical World

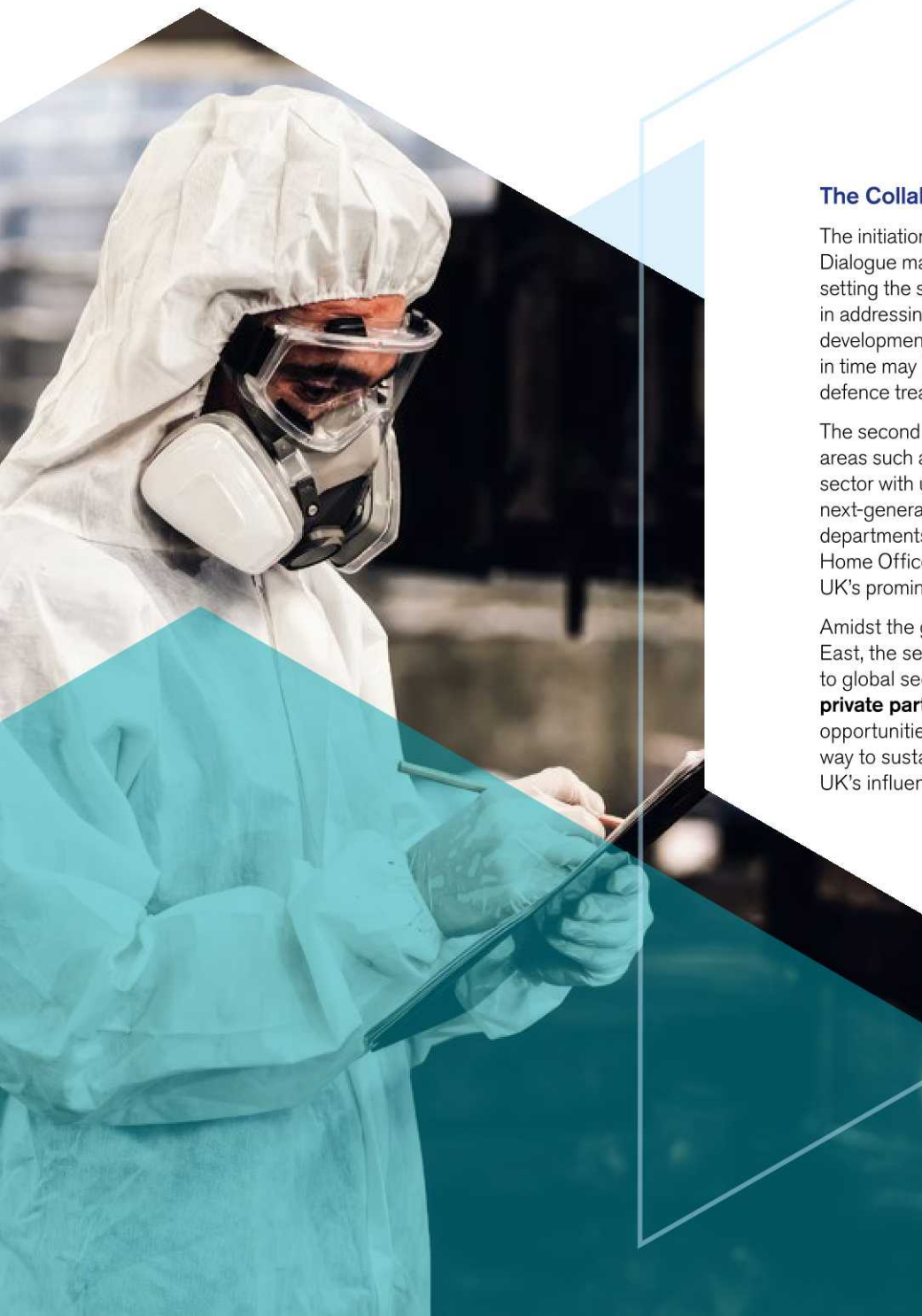
The streets of the UK are grappling with knife crime, a spectre that haunts urban safety. There has been a clarion call for **innovative technological solutions to crime** - ranging from advanced detection systems to predictive analytics - to mitigate this pervasive issue. This emphasises the centrality of machine learning and surveillance technologies to public safety.

The threat of terrorism to the UK remains substantial, set against the backdrop of a disturbing rise in antisemitism and Islamophobia. The **speedy implementation of the Martyn's Law legislation** to strengthen protective security in public spaces, must be a focus in Parliament over the course of the next year.

The **salience of border security will remain high** in 2024, driven by climate change and conflict. The sector will continue to work closely with UK Border Force and international counterparts to provide technical capabilities such as advanced screening and detection and biometric technologies to provide secure border management solutions.

The **importance of national resilience** is higher than ever, with the ongoing UK Covid-19 Inquiry keeping a spotlight on this issue. Debates on reforms to government machinery will only increase, considering the role of bodies such as the National Security Council and the need for a coordinated and agile crisis response by both public and private sectors actors.





## The Collaborative World

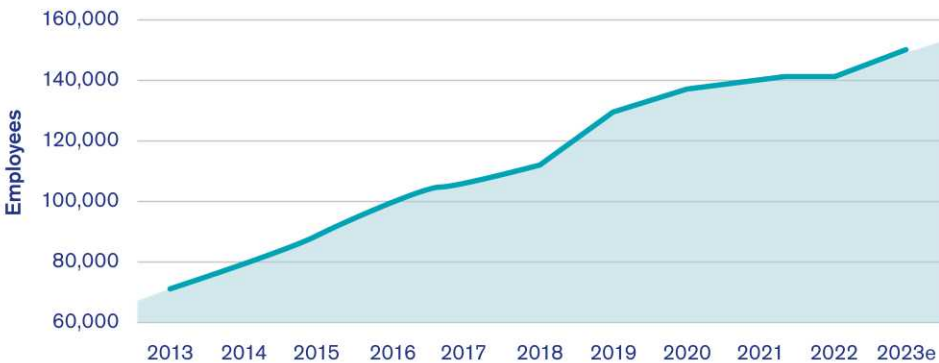
The initiation of the first-ever UK-EU Counter-Terrorism Dialogue marks another thaw in UK-EU relations, setting the stage for **enhanced UK-EU cooperation** in addressing shared security challenges. This development opens new avenues for collaboration, which in time may lead to a much-needed UK-EU security and defence treaty with industrial dimensions.

The second pillar of the **AUKUS alliance** (covering areas such as quantum computing and AI) presents the sector with unparalleled opportunities to help develop next-generation security solutions. This calls for key departments including the Ministry of Defence and Home Office to work with the sector to strengthen the UK's prominence in AUKUS and on the global stage.

Amidst the geopolitical tumult in Europe and the Middle East, the sector is uniquely positioned to contribute to global security efforts. The need for **public-private partnership to secure** major security export opportunities has never been more critical, as a core way to sustain export-led growth and strengthen the UK's influence and international partnerships.

# JOBS AND PRODUCTIVITY GROWTH

Employment in the security and resilience sector more than doubled between 2013 and 2023



**148,000**

PEOPLE ARE EMPLOYED  
IN THE SECTOR IN 2023

GROWTH  
OF MORE THAN  
**105%**  
IN THE  
LAST **10** YEARS

Alongside increased employment, sector productivity has also improved.

**£82.7K**  
OUTPUT PER WORKER

SECTOR  
PRODUCTIVITY  
HAS GROWN

**25%** IN **5**  
YEARS

Productivity (output per worker) in the security and resilience sector



**£45.3K**

AVERAGE ANNUAL  
EARNINGS.  
**29% HIGHER THAN  
UK AVERAGE**



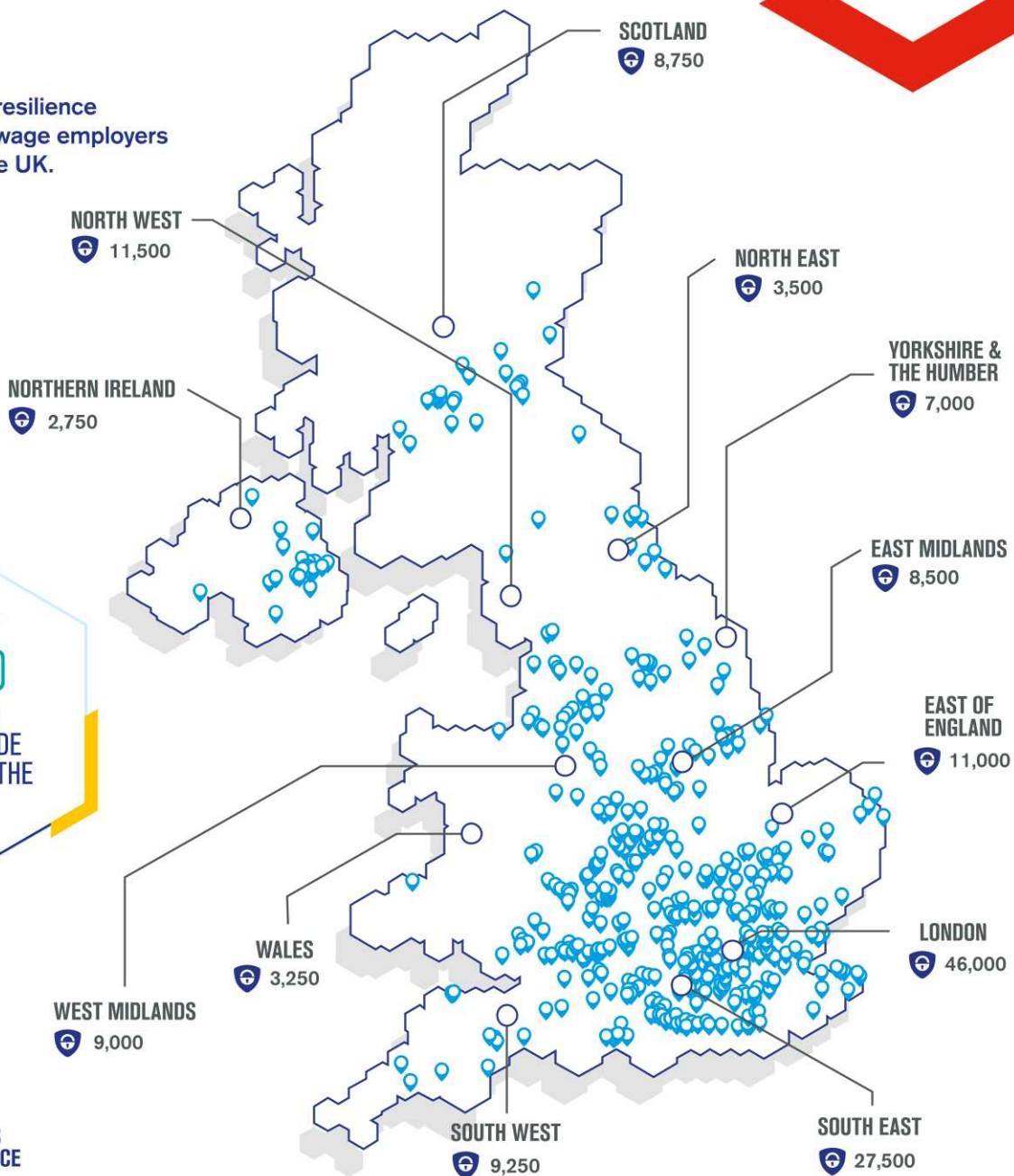
## SECURITY

The security and resilience sectors are high-wage employers located across the UK.

**50%**  
OF JOBS ARE  
LOCATED OUTSIDE  
OF LONDON AND THE  
SOUTH EAST

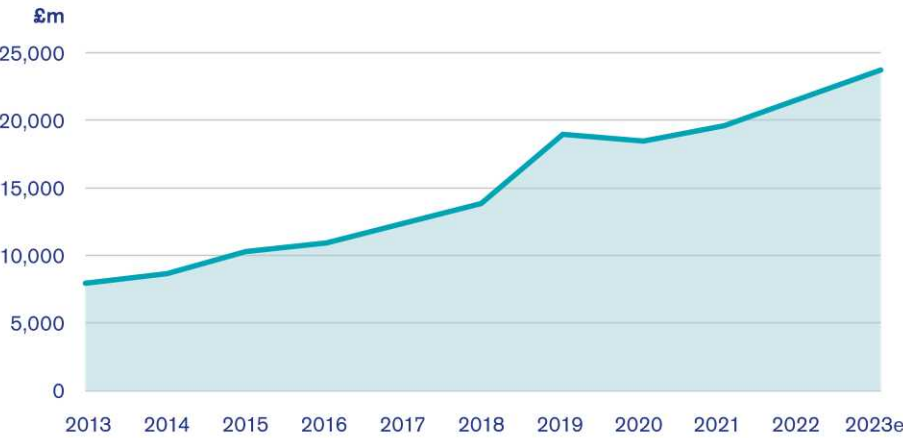


DOTS REPRESENT  
THE LOCATION OF ADS  
SECURITY & RESILIENCE  
SECTOR MEMBERS.



# HIGH VALUE SECTOR

Turnover in the security and resilience sector



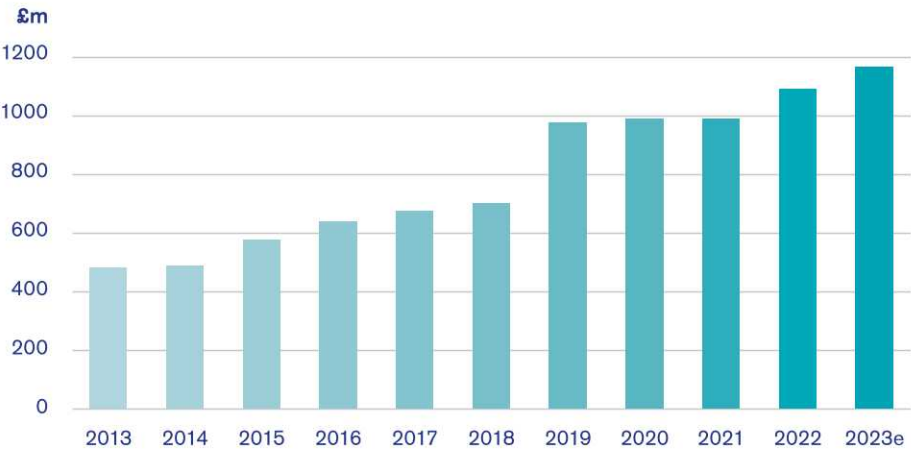
TURNOVER INCREASED

189%

IN THE LAST 10 YEARS

TO REACH  
£23.4BN  
IN 2023

## INVESTMENT IN R&D





VALUE ADD FROM SECURITY  
AND RESILIENCE GREW

**165%**

IN THE  
LAST 10 YEARS

TO REACH  
**£12.2BN**  
IN 2023

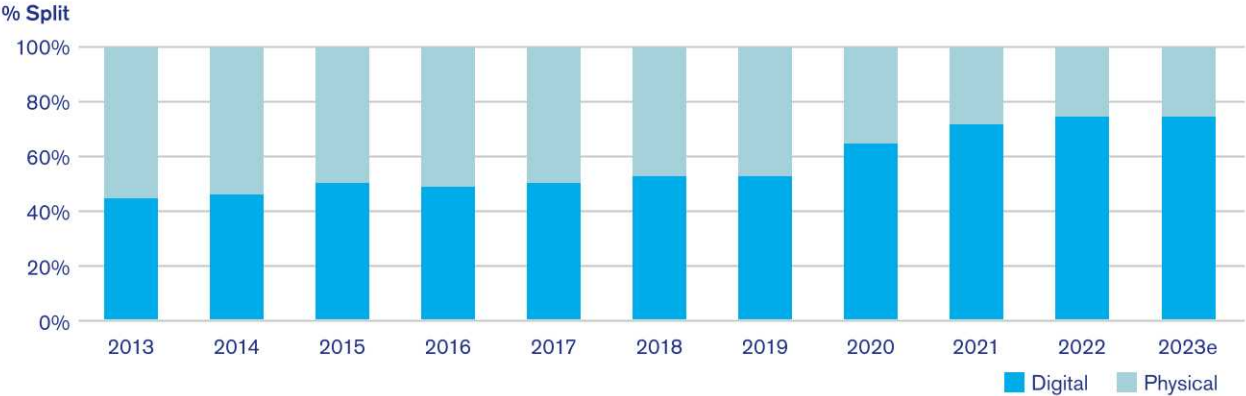
# EXPORTS ARE GROWING...

EXPORTS WORTH  
**£10.5BN** IN 2023

**228%** GROWTH  
OVER 10 YEARS



Export capabilities are split.



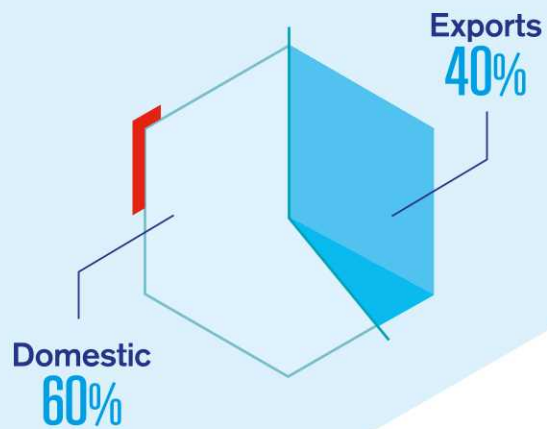
With emphasis shifting towards digital:

EXPORT  
CAPABILITIES 2023

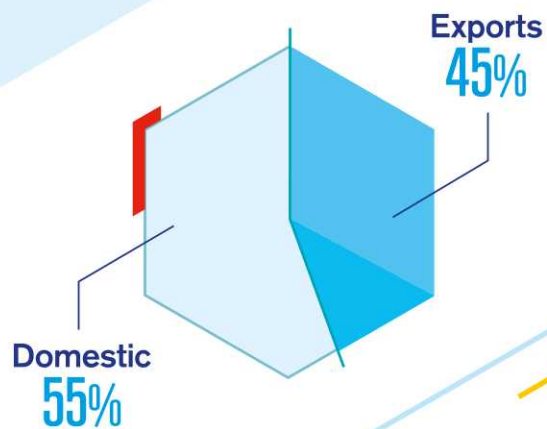


Turnover generated by exports has increased over the last ten years

### 2013 SHARE OF REVENUE



### 2023 SHARE OF REVENUE





## ABOUT ADS

ADS is the trade association for the UK's aerospace, defence, security, and space industries, representing more than 1,300 members. We work with those sectors to secure the UK's advantage, enhance our international positioning as a go-to destination for innovation, and deliver on our sustainable leadership goals.

## ADS CONTACTS

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**ADS works with local, regional, and national Government departments and agencies in the UK and with international organisations involved in policy-making that impacts our sectors to achieve this.**

ADS Security Outlook 2024 uses data estimates for 2023 data compiled by Oxford Economics in 2024, based on publications from UKDSE, using Westlands Advisory insights as well as ADS own sources.