

# STATE OF THE INDUSTRY 2021

The Locksmiths' Perspective

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THE TECHNICAL RESOURCE FOR THE PHYSICAL & ELECTRONIC SECURITY SPECIALIST

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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 2022 and beyond.

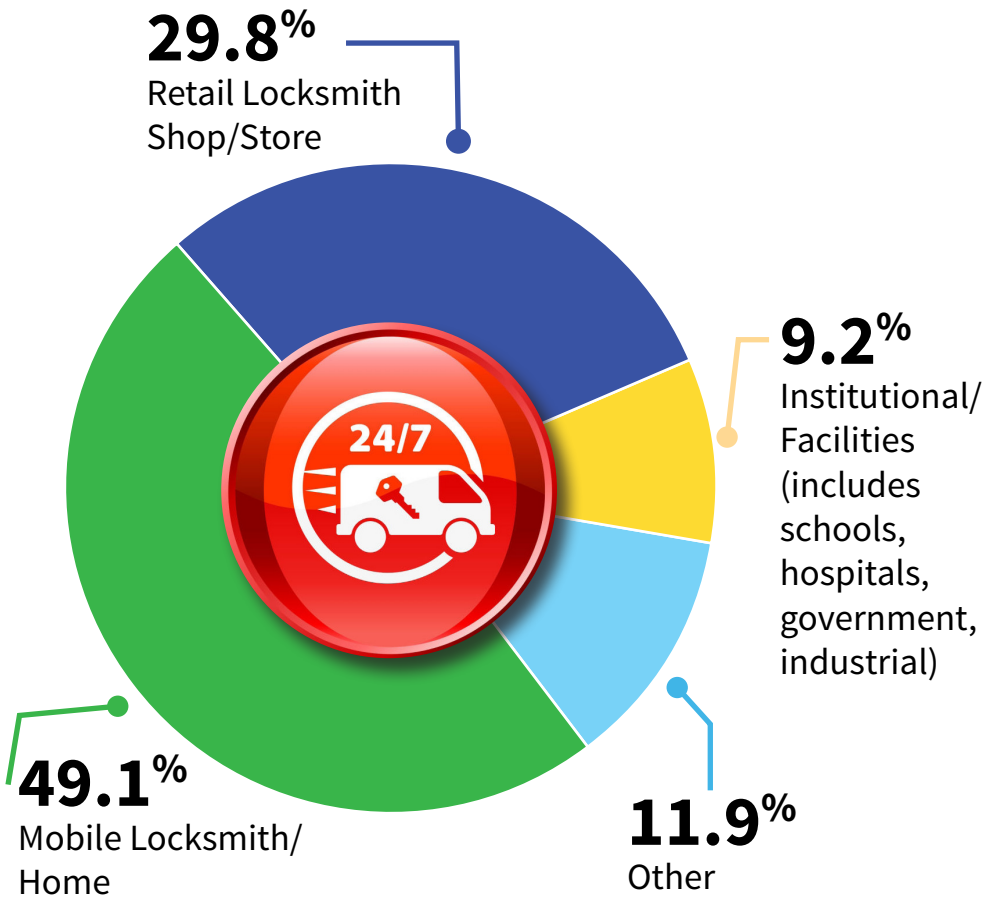
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**Opening Salvos**

“ Over the past year and a half, I have made a great push to advance our automotive program, which has really made all the difference.”

“ The specialization of access control, whether it’s electronic or mechanical, is going to continue. We’re going to continue down that path and not have to worry about dealing with scammers, because you’re doing work that scammers aren’t even asking to do, because they can’t.”

“ This industry needs a lot of help.”

**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 218 qualified respondents who participated in this survey.

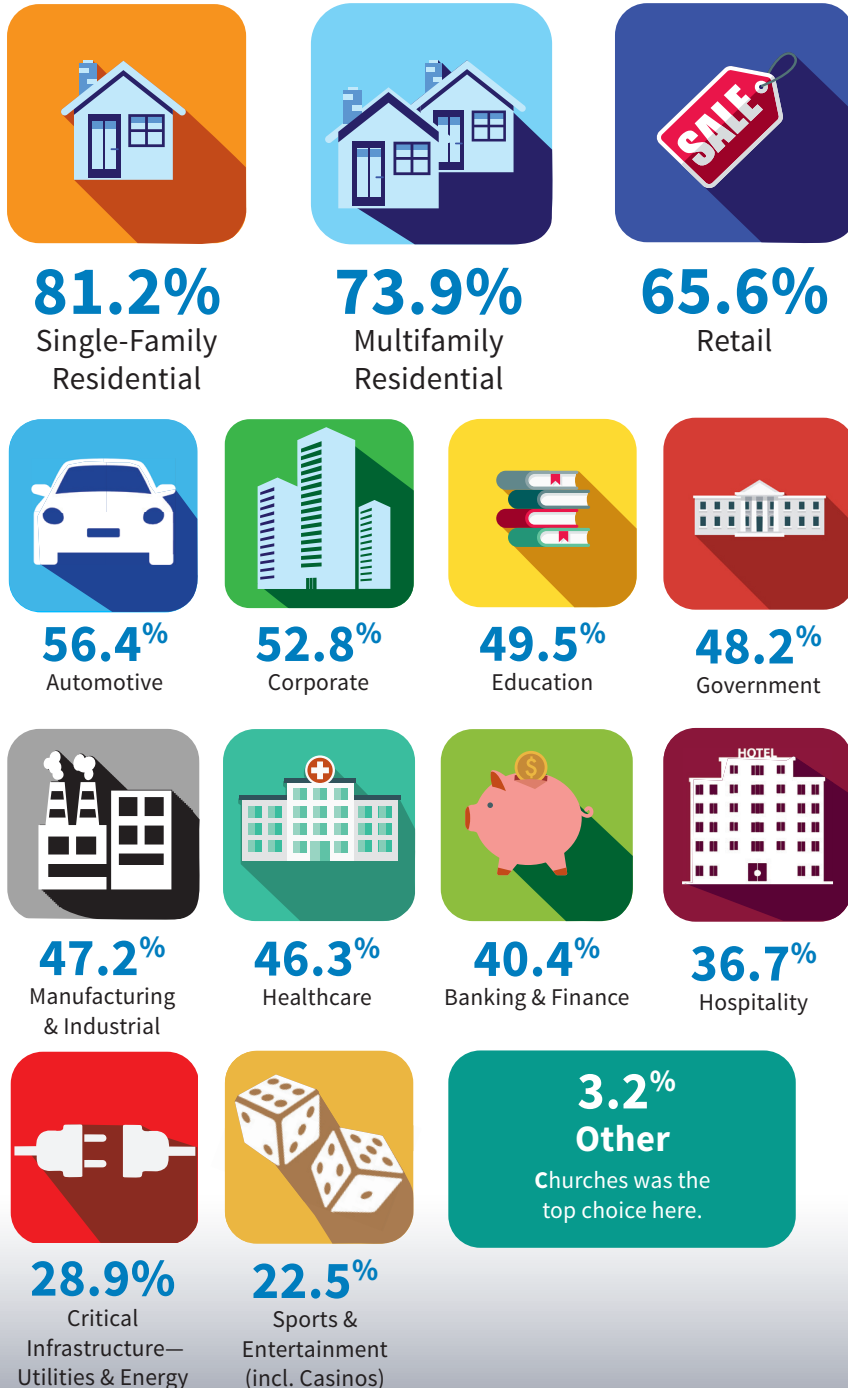
The largest percentage of the responding locksmiths were those who self-identify as mobile or home-based (49.1) as their primary business, followed by the 29.8% who self-identify as owning a retail shop. In all, 86.7% of respondents describe themselves as working in a private business. The remainder are employed by institutions or in the supply chain.

As one might suspect, a fair amount of crossover exists. Nearly two-thirds of the respondents who chose the “other” category list some combination of retail, mobile and institutional. Most of the rest work for distributors or manufacturers.



## Vertical Market Presence

Respondents were asked to name the vertical markets in which they do business. They were asked to select all that apply, so the sum won't add up to 100%.



## Wearing Many Hats

Today's locksmiths have to be prepared to tackle almost any type of job, and, based on our survey, most do. More than half of all respondents (55.5%) say they have a presence in at least five of the listed categories, about the same as the previous year. However, the percentages of those who have a presence in at least seven (44.0%) and who have a presence in every category (9.2%) are up from last year.

For the most part, individual categories fared about the same as the previous year, with two notable exceptions. Big increases were seen in the percentage of locksmiths involved in residential work, both for multifamily (73.9%, up from 66.4%) and single family (81.2%, up from 71.5%).

This comes as no surprise considering the ongoing COVID pandemic, which has led to more people staying at home rather than traveling for work or vacation. Home-improvement projects set a record in the United States during 2020, and such projects were expected to remain strong again in 2021. That includes security products, such as locks, video surveillance and home automation.

"We got a lot more residential [business]," Glenn Younger, president of Grah Safe & Lock in San Diego, says of 2021. "Residential is growing, because there are fewer people who feel comfortable doing that themselves, and there were obviously more people at home during the pandemic."

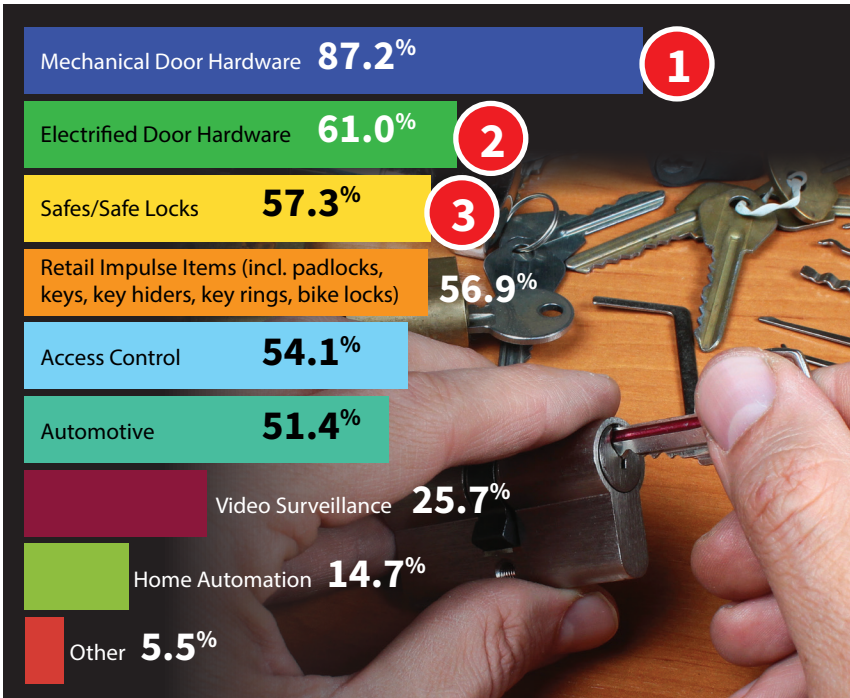
“The DIY market relies on people who are pretty handy, and there are fewer of them.”



## 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?



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### A Broad Palette

In addition to covering a lot of ground as far as taking jobs, today's locksmith provides a broad assortment of products for their customers. More than half of our respondents (54.1%) say they sell at least four of the product categories listed, and 9.2% say they sell all.

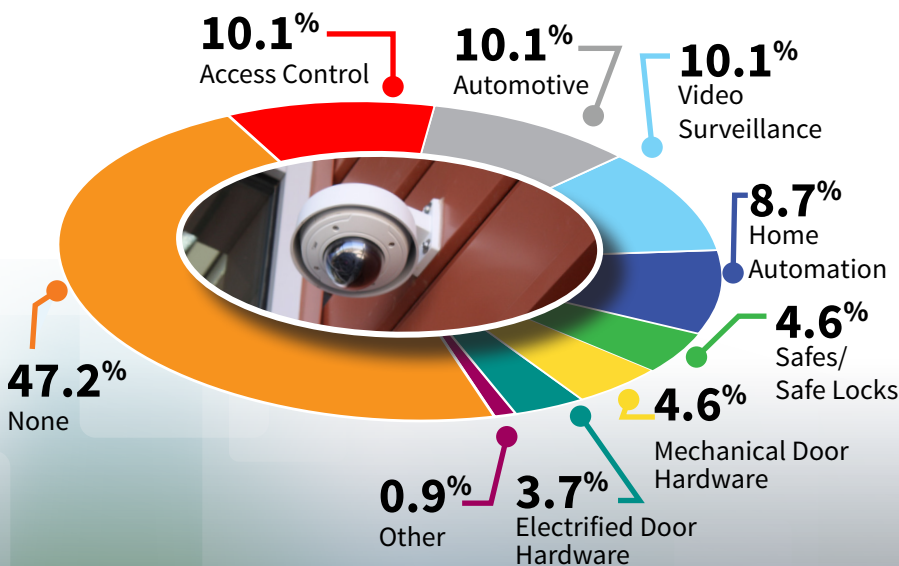
Mechanical hardware remains the foundation of the industry and by far the biggest category among locksmiths. However, as a likely result of the continued push by manufacturers toward electronics, the percentage of locksmiths who sell electronic hardware crossed 60% in 2021 and closed the gap slightly with mechanical.

A new category for us this year is home automation, and it will be interesting to see where that number goes in the coming years given the increase in home improvement in general. Plus, manufacturers that make electronic locks for the residential market are tying their products increasingly to home-automation systems.

Given the broad product coverage already, it's no surprise that by far the biggest response when it comes to what category locksmiths most want to add would be none of the above — they already are saturated in products. One locksmith who provides a broad choice of products says it best: "I like what we do."

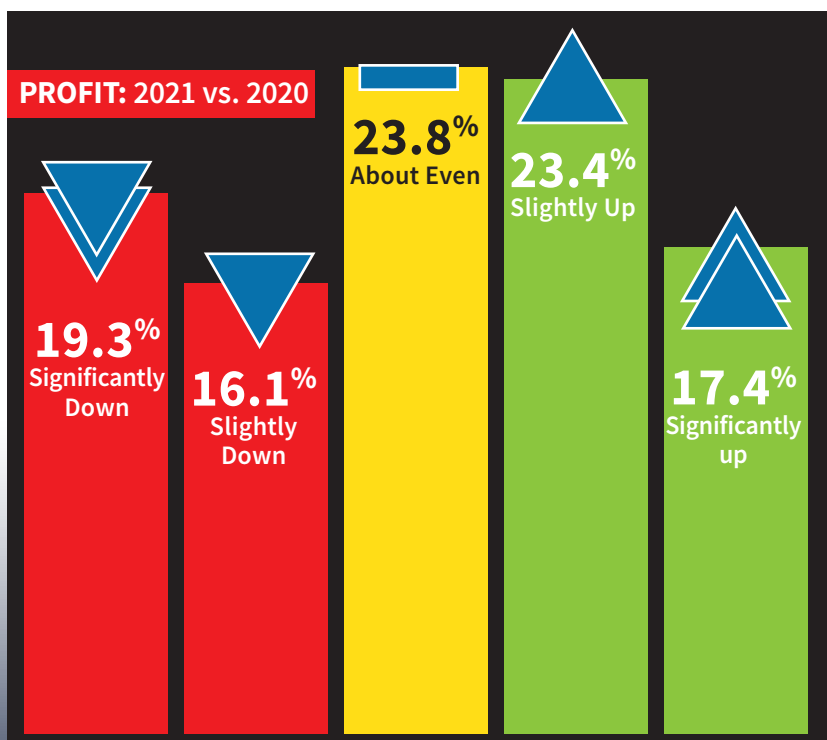
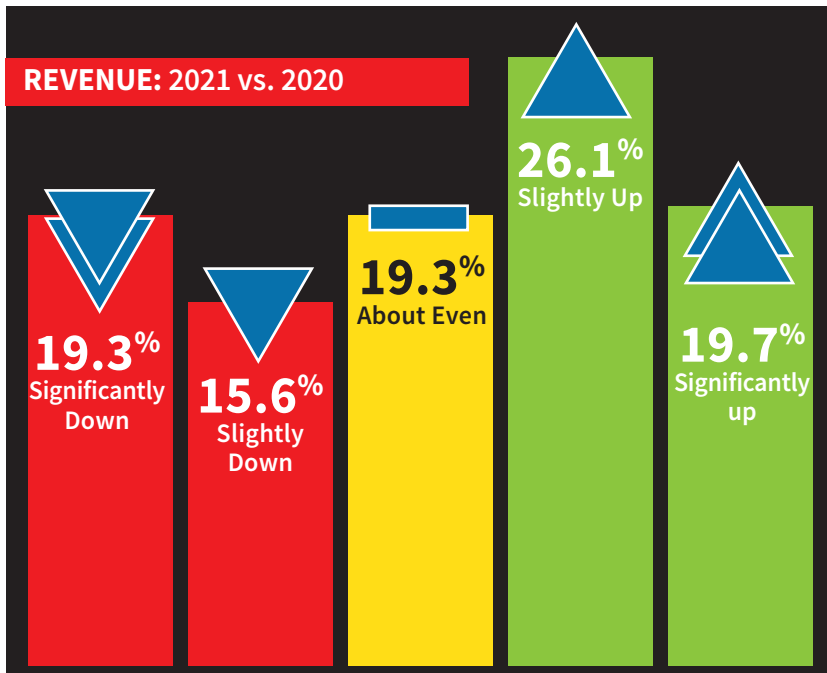
It's also no surprise that a large majority of locksmiths (61.7%) who want to broaden their selection want to add electronic categories, such as home automation or video surveillance.

What product category do you most want to add?



## 2021 Revenue & Profit Trends

Respondents were asked how 2021 revenue was trending compared with 2020 numbers as well as how profit was trending during the same period.



## On the Rebound

The locksmith industry suffered a difficult year in 2020, so, generally speaking, unless the economy tanked, 2021 was going to show as much better. According to our survey, it has, although the improvement wasn't quite as dramatic as one might hope, and it certainly wasn't across the board.

From a sales perspective, 45.8% of respondents say they showed improvement in 2021 of more than 1% from the previous year. That compares with 23.2% the previous year. Conversely, only 19.3% say their sales were down significantly (more than 10%) compared with last year, vs. 35.3% in 2020.

Profit margins showed a similar improvement, with 40.8% saying their profits were up in 2021 more than 1% over the previous year, compared with just 25.0% in 2020. Again, a significant decline in profit margins was seen by just 19.3% in 2021, compared with 35.4% in 2020.

Comments from our respondents reflect the better times:

"I'm as busy now as I have ever been."

"We're busier today than we were before the pandemic. I've added a new vehicle to my fleet and an extra employee."

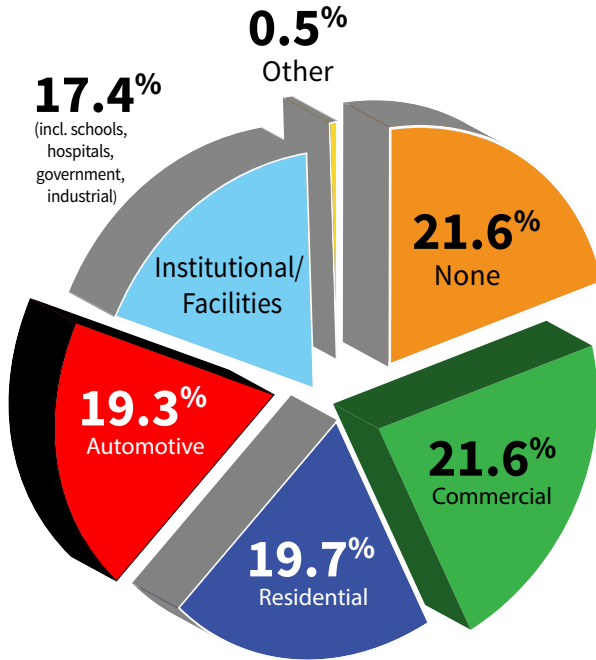
After the challenges of 2020, when several locksmiths told us they closed or were about to close, that's a relief.



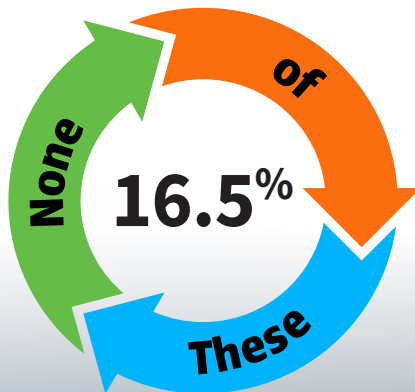
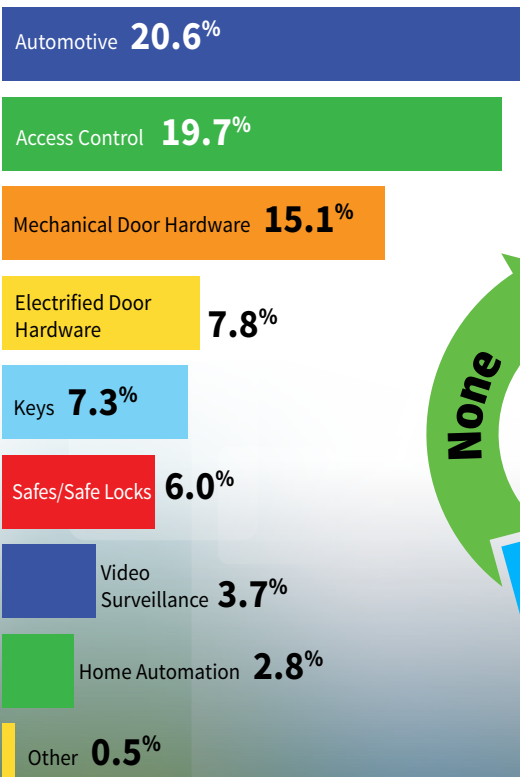
## 2021 Market & Product Segment Gains

Respondents were asked the following questions about their business with respect to 2021:

Which market segment increased the most for your business in 2021?



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



### No Growth? Not Really

When it comes to identifying market or product segments that showed the biggest increases among locksmiths in 2021, there was a clear winner in each category — None. That doesn't mean it was a bad year. It's just that more respondents didn't single out a market or product as having stood out during 2021. However, after that's taken into consideration, trends emerge.

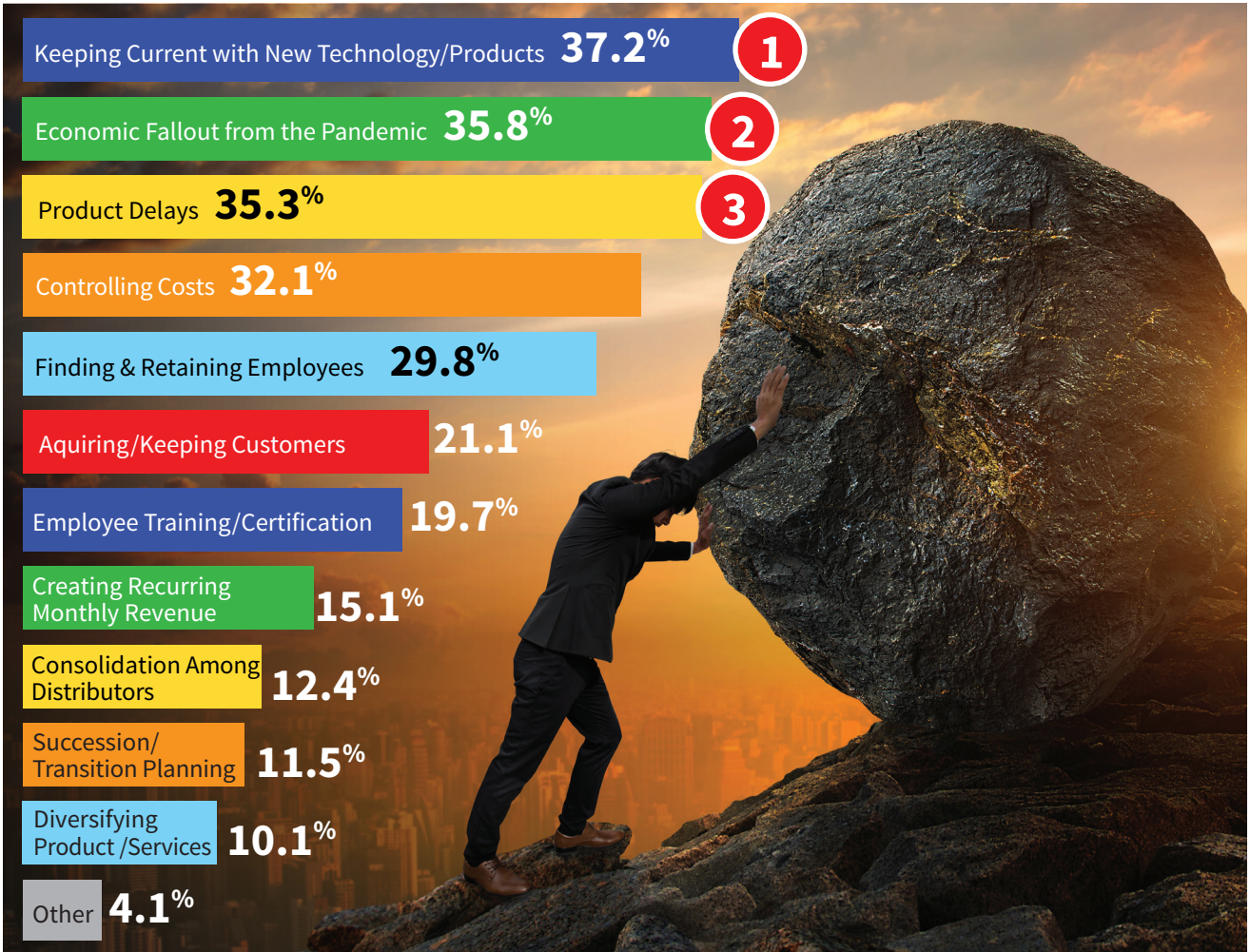
Among the markets, the biggest increase among the categories listed is in institutional or facilities. That's to be expected in light of two government funding programs aimed at K-12 schools (ESSER) and colleges (HEERF) that were implemented in 2020. Educational facilities were in line to collect billions of federal government dollars, and some of that money went to upgrading security in anticipation of campuses opening wider to students for the 2021-2022 school year.

Among products, automotive remains atop the list, with access control close behind and showing an increase relative to the previous year. That came at the expense of mechanical hardware, which declined from 24.4% in 2020.

Automotive's standing is another indication that that market remains strong despite more carmakers going electronic and even ditching physical keys for an app in a few cases. However, with the average age of vehicles in the United States at all-time highs and ongoing problems in the supply chain, the market should remain good for automotive locksmiths.



Respondents were asked about the biggest challenges to their business in 2021. They were asked to select their top three challenges, so the sum won't add up to 100%.



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### Obstacles in the Way

Of course, COVID-19 and the fallout from the pandemic remain a big story in the security industry as well as elsewhere. But unlike 2020, it wasn't the only story, as reflected by our survey results. Last year, the pandemic's effect on business dominated, with 64.8% of respondents choosing it as a top challenge.

It's still one of the top challenges in 2021 but nothing like the year before as other challenges presented themselves in the news.

Earlier in 2021, the security industry saw a number of acquisitions that led to consolidation among distributors and confusion among locksmiths. In the summer, the dramatic closing of the Suez Canal when a massive container

tanker got stuck became an icon of a supply chain that had become mucked up. The result has been massive product delays that have fueled price inflation.

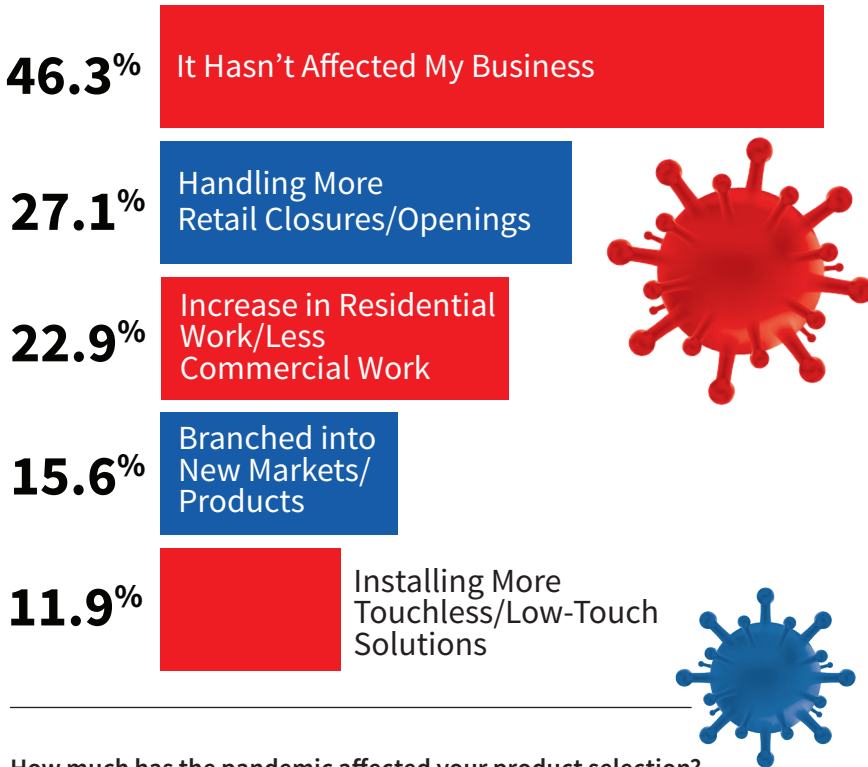
The pandemic, naturally, has had an effect on those delays by forcing the closure of plants that exacerbated backups and by keeping the job market in flux. In other words, even though it isn't the dominant story in 2021 that it was in 2020, COVID's effects continue to be felt throughout the security industry.

"It's a problem; I'm not going to lie," Larry Schwalb, security engineer at Houdini Lock & Safe in Philadelphia, says about the pandemic's effect on the economy and related areas. "I've never seen our company so short-handed."

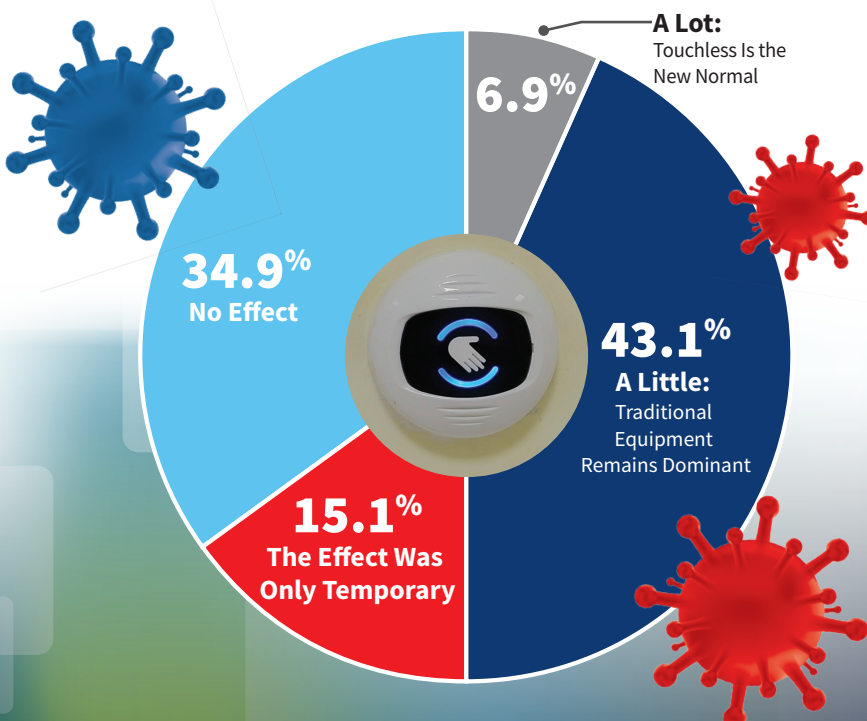
## Pandemic's Continued Effects

Respondents were asked the following questions about their business with respect to COVID-19. For the first question, they were asked to select as many as apply, so the sum won't add up to 100%.

Apart from sales, how has the pandemic affected your business?



How much has the pandemic affected your product selection?



## Symptoms Linger

Recently, the COVID-19 pandemic surpassed even the 1918 flu pandemic as the largest mass fatality event in U.S. history.

However, with the distribution of vaccines and relaxation of business restrictions, there's no question that locksmiths were affected by the pandemic differently in 2021 from how they were in 2020. For example, we found that 2021 has been better financially overall.

Given that, we asked a slightly different question this year to explore how the pandemic has affected businesses apart from revenues and profits. By far the highest response is that it hasn't, with nearly half our respondents saying business continues as it had before. We would expect that if finances were taken into consideration, the number might not be as high, but in 2020, less than 10% said the pandemic had no effect on their business, so it's clear that the effects have eased.

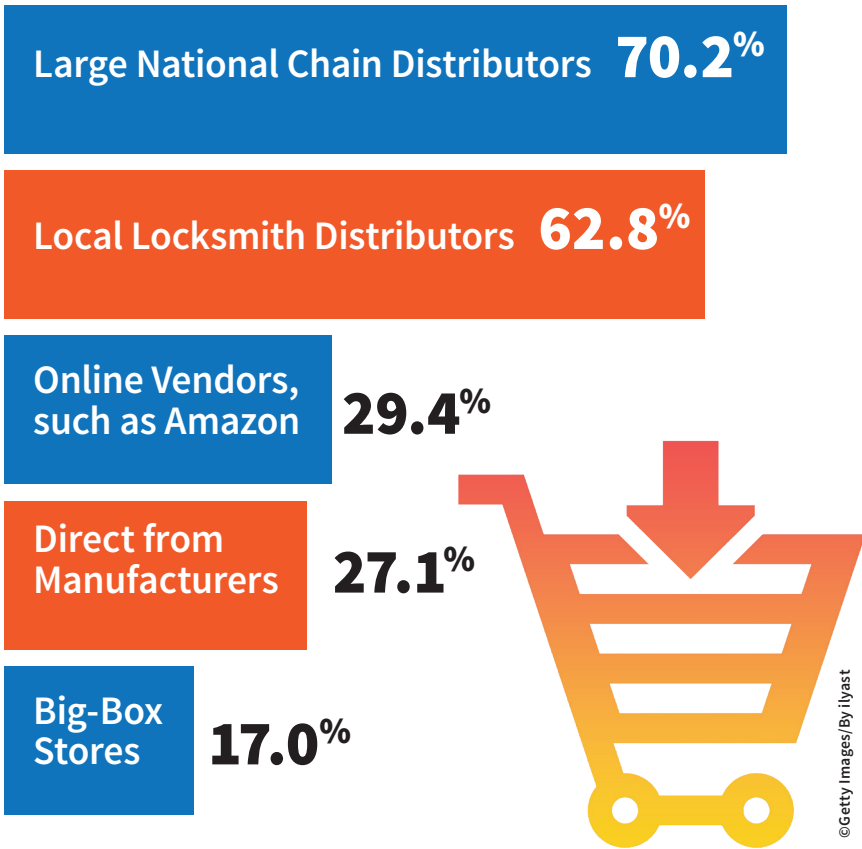
However, the pandemic appears to have had the least effect on an area that the security industry has expected to increase rapidly as a result: touchless doorways.

Although the question allowed for multiple responses, only 11.9% of locksmiths say the pandemic has led to more installations of touchless or so-called low-touch solutions. One locksmith who said they were installing more as a result of the pandemic says, "We had already been transitioning to touchless before the pandemic."

And, with respect to how the pandemic has affected product selection, only 6.9% are willing to say touchless is the new normal, nearly half the percentage in 2020.

## Product Purchase Sources

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



## Part of the Deal

Consolidation of distributors has been an ongoing issue in the security industry. In 2021, it heated up again, highlighted by multiple acquisitions of automotive-heavy distribution companies by a private-equity firm under the auspices of Automotive Keys Group and the merger of Banner Solutions and industry icon H.L. Flake.

If our respondents are an indication, these deals haven't been greeted with universal approval in the locksmith industry. Several comments speak to a lack of good product selection and prices that beg a fundamental question about the necessity of distributors.

Distributors have a simple response: availability, product knowledge and service you can't find online or get by going to a big-box store, not to mention the training opportunities that are provided by so many. And our data shows that, yes, locksmiths overwhelmingly buy through distributors, whether local or national, for whatever reason.

But nearly 30% admit that they go to Amazon and other similar websites for products, whether in addition to or in exclusion of buying through distributors, and 17% say they get what they want at least occasionally from the same big-box stores seen by many locksmiths as being a threat to their business.

As one locksmith puts it, "If I can buy the same things on Amazon and eBay for the same prices or better, why do I need a distributor?"

“Just recently, my most-used distributor has been shut down, which will cause more delays in receiving my items in a reasonable time frame.”

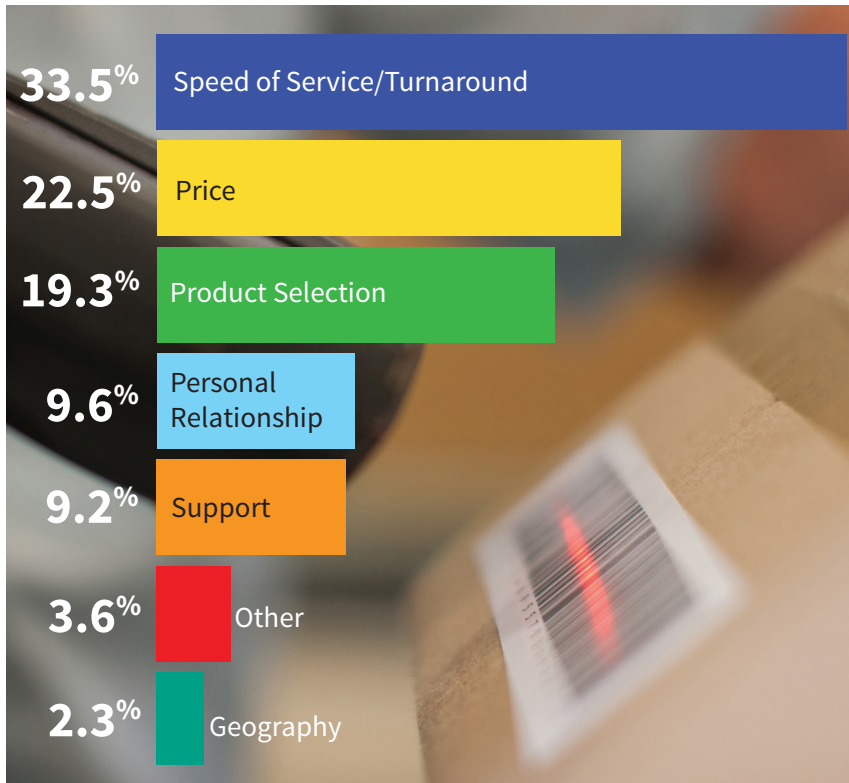
“My company name implies lower prices, thus I need to get the best price on my supplies.”



## 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?



## Price Is Right

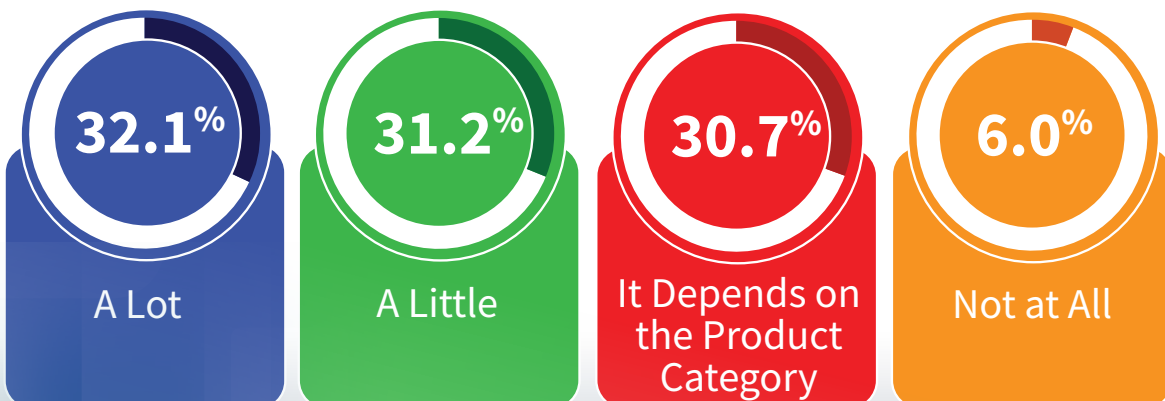
Of course, controlling costs is important to any business, and product prices are one of the biggest variable costs that locksmiths have.

Naturally, we would expect price to be a significant factor with respect to the importance of product selection, and it is. Ninety-four percent of our respondents say price has at least some bearing on how they select the products they stock.

Interestingly, however, it isn't the primary concern when it comes to selecting a distributor partner. Speed of service or turnaround is the No. 1 category by a significant margin. A combination of our categories make up most of the "other" responses.

Schwab disagrees with our respondents though. Price is paramount, he says. "If you're my best friend, and I call you up to buy a spindle, and you want \$30 and the guy down the street wants \$5 ... I love you, buddy, but I can't buy them from you."

How much does price affect your product selection?



## 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%.



**40.8%**

Economic Conditions



**37.6%**

Increased Prices



**32.6%**

Finding/Retaining Employees who Have the Right Skills



**31.7%**

Product Delays



**28.4%**

Unscrupulous Competitors/Scammers



**24.3%**

DIY Big-Box Stores



**23.9%**

Internet/Direct Sales



**16.5%**

Technology Outpacing Skills



**14.2%**

Competition from Larger Service Providers



**10.1%**

Self-Service Kiosks



**3.2%**

Regulatory Compliance

**2.8%**  
**Other**

Single-vote items include "lifespan" and "none."

## Trouble Abounds

There seems to be no end to potential dangers lurking for locksmith businesses, but in 2020, two stood head and shoulder above the others: economic conditions and uncertainty surrounding COVID.

The uncertainty that surrounded COVID has become less of a factor in 2021, because we now know its effects, and they can be felt in several categories, such as higher prices, product delays, employment and even the No. 1 selection.

Economic conditions again sits atop the list of business threats, albeit at a response rate more than 37% below the rate of the previous year. On the one hand, that's another indication that things are better overall for locksmiths. On the other hand, however, that it still resonates as the top threat is an indication of how much the industry has been affected.

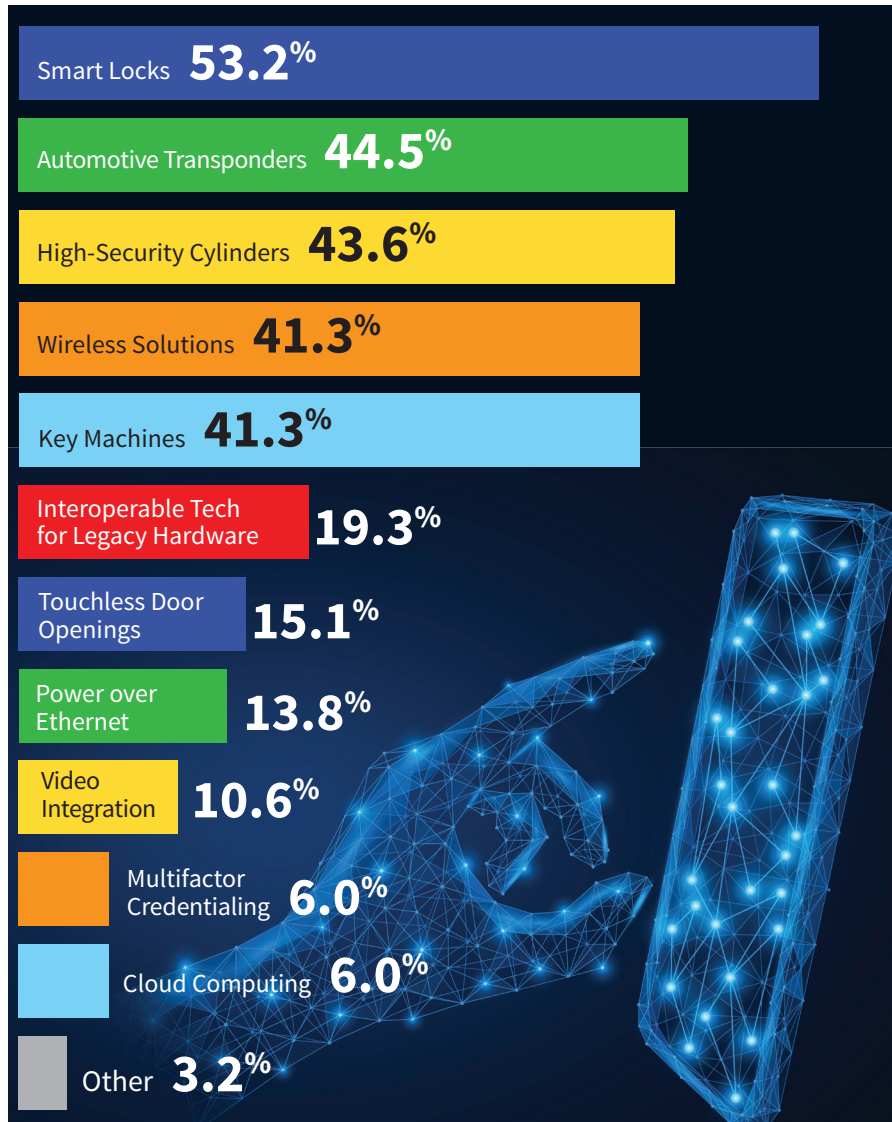
Typically, of course, when the economy is down, times are good for locksmiths, because more people want to protect their homes, offices and the people and items therein. That's still true, but more locksmiths than before are feeling the overall effects of a shaky economy that also is being affected by price increases, supply backups and worker shortages.

After those threats come the industry's long twin complaints: scammers and DIY, although DIY showed a large decrease from 2020. But one that wasn't even on our radar a year ago garnered more than 10% among respondents as a top three threat — self-serve keymaking kiosks for consumers.

These are increasingly common at stores around the country, and some suppliers now offer basic locksmithing services through affiliated local lockshops. We'll keep an eye on this development in 2022.

## 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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# STATE OF THE INDUSTRY 2021

## A Lock on Interest

Locksmiths always have had to focus on technology, because no matter what's available, a better way to lock a door and prevent unwanted people from having access will emerge.

Increasingly these days, the solution involves the device that nearly everyone has on them at all times — the smartphone. The idea of opening a door by grabbing that device and pressing an app instead of using a fob, card or key appeals to the public, so, naturally, manufacturers push more smart locking solutions.

It's no surprise that locksmiths are keen on smart locks. It was the No. 1 technology of interest in 2020, and it's No. 1 in 2021, by an even larger margin.

However, we saw a consolidation of top interests as far as technology in 2021. Five technologies topped 40 percent among our respondents, but those five evenly represent mainstream locksmithing.

Two technologies — smart locks and wireless solutions — are a large part of electronic access control. High-security cylinders, for the most part, remain a mechanical technology. Automotive transponders, of course, are crucial to automotive locksmiths, and key machines are associated with mechanical and automotive locksmithing.

One locksmith who chose wireless solutions among his top three, along with smart locks, says, "We basically only work with nonhard-wired access control systems."

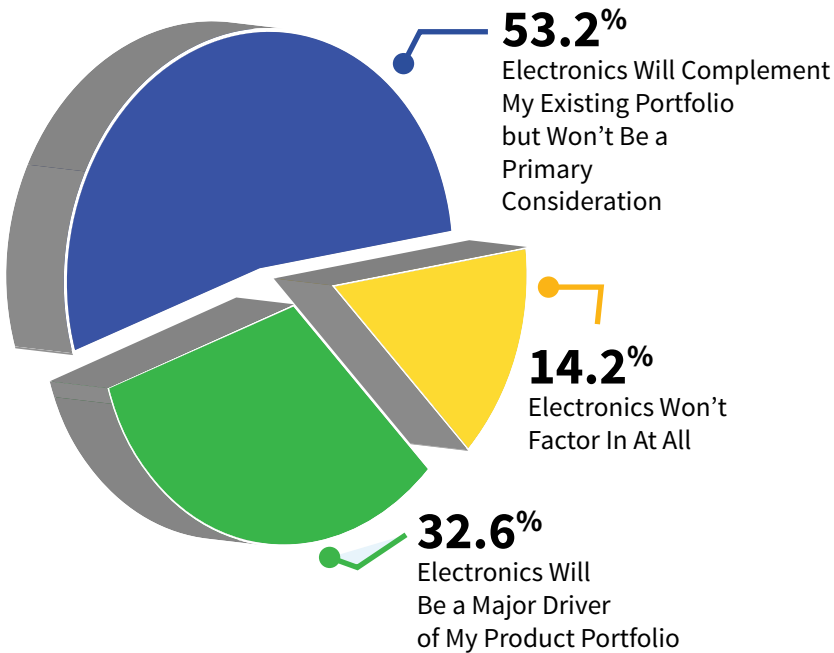
“To put in a lock that will work with everything else existing there [at the door], the hybrid solution, really pops out.”



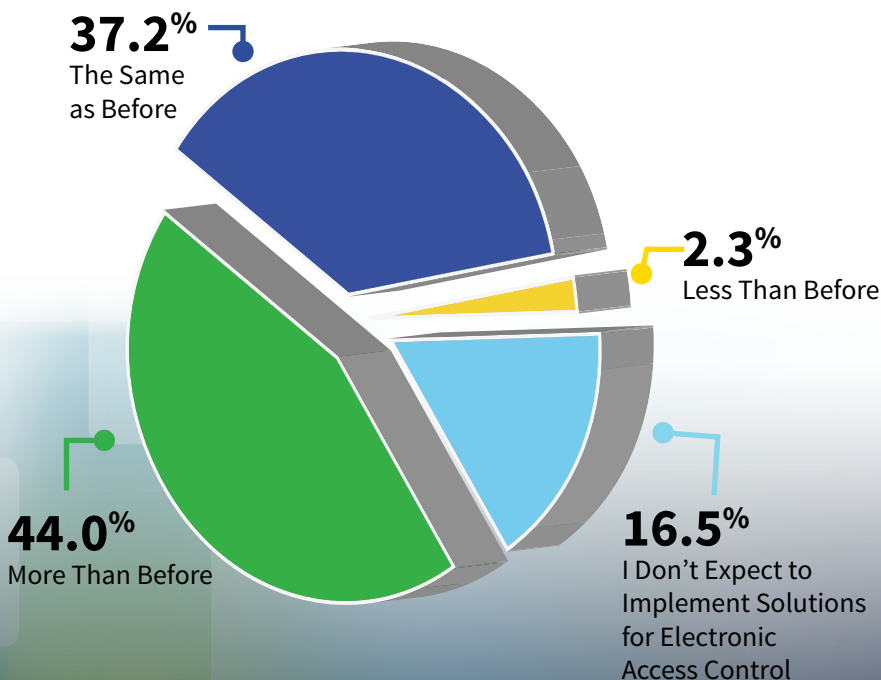
## Electronics & Access Control

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?



## More Power to You

When it comes to distinguishing between a “locksmith” and a “security pro,” there seems to be a clear demarcation line: electricity.

Schwalb, who calls himself a security engineer rather than a locksmith, notes this. “Locksmiths don’t like devices that don’t have a keyhole,” he says. “Locksmiths like things that have the opportunity for bypass or a workaround.”

Nevertheless, locksmiths also know the future is electronic and that electronics is the name of the game when it comes to access control because of the features that providing power to the door bring to bear.

The most desirable include audit trails of who attempts to enter a door and when, easy issuance of credentials, the allowance of real-time updates and that all of these can be handled or viewed remotely via any computing device. If locksmiths or security pros want to stay in business, they must adapt to the realities of an increasingly electronic range of locking solutions.

Based on our survey, they have or are doing so. Of our respondents, 85.8% say electronics will be a part of their product portfolio by 2024, and 32.6% say it will be a major part, up from 26.7% the previous year.

Meanwhile, 83.5% expect to implement EAC solutions, with 81.2% saying it will be at least as much as they had before. Those are increases from 80.4% and 77.6%, respectively, in 2020.

Even though most of our respondents have taken the plunge, we expect the numbers to grow closer to 100% as we move forward. As one locksmith who doesn’t handle EAC says simply, “I would like to make it part of my business.”

## 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: Fifty-four respondents say their business doesn't handle electronic access control, so the percentages reflect those that do.

## Wanting to Get Smart

When it comes to interest in technology in general, the No. 1 topic is smart locks. So, it should come as no surprise that the technology behind smart locks, whether it's near field communications or, increasingly, Bluetooth, is the top EAC technology that interests today's security pro. However, in 2021, there's a larger divide at the top, with wireless/PoE and touchless showing large declines in interest.

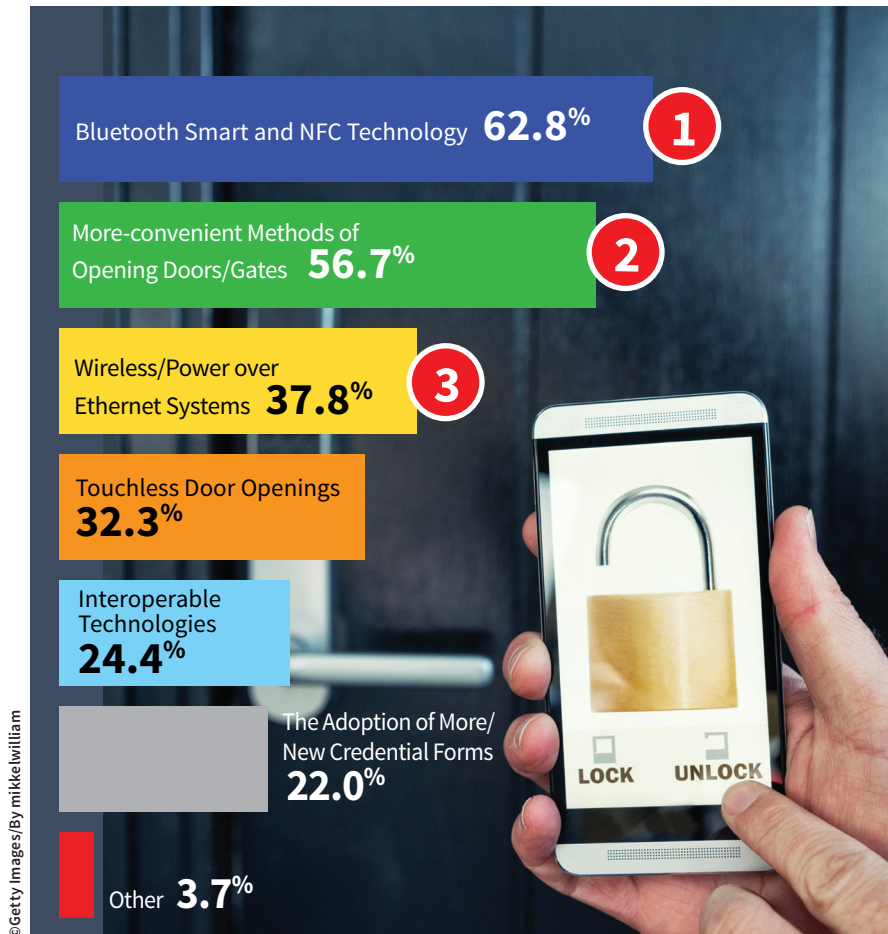
Bluetooth, in particular, has become a major force in EAC, allowing not only for mobile credentials, but also for mobile setup of products through an app, as well as mobile reporting of data. Convenience is a big factor when it comes to determining how a customer wants to set up an EAC system, and the convenience of using a device that most people carry with them and are less likely to lose compared with a card or fob — their smartphone — is a big driver.

Unfortunately, convenience doesn't necessarily extend to the installer, as one of our respondents points out: "Security access and easy seldom go hand in hand."

As for more-convenient ways to open doors and gates, smart technology, of course, plays a role in that, and we're curious to see what happens when the promise of ultra-wide-band (UWB) is brought to bear.

UWB is a broadcast technology similar to Bluetooth but allows for more-precise readings of credentials and, potentially, more passive passage through doors. In other words, people wouldn't have to produce their smartphone at a reader to gain access through a credential. If approved, they could just walk through.

UWB might start to appear in the security industry as early as 2022. Whether it makes installing EAC systems any easier remains to be seen.

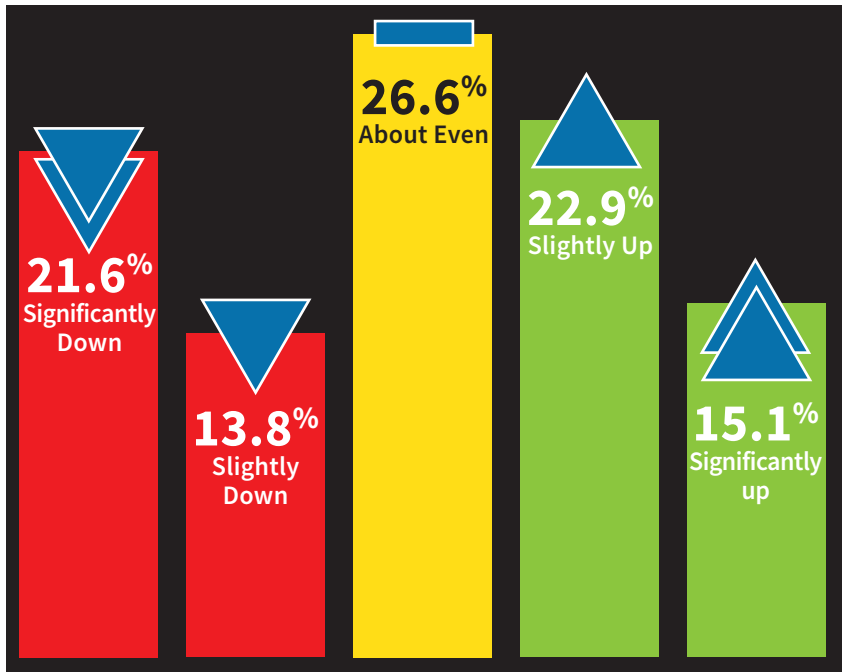


“With wireless, it's lower cost installation, because you aren't running wire and doing real expensive things.”

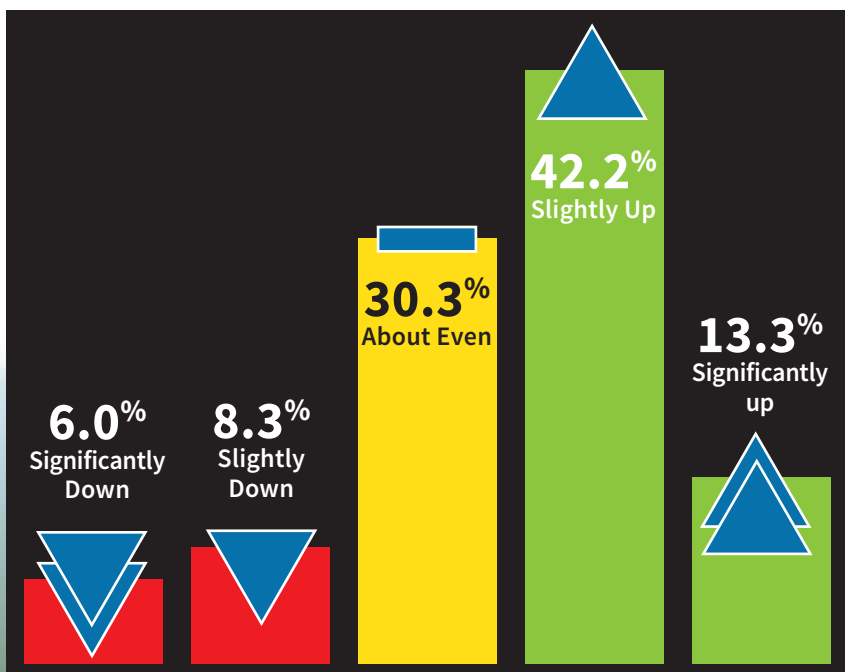
## Work Trends & Projections

Respondents were asked how 2021 scheduled work was trending compared with 2020 as well as their expectations for future projects.

Weekly Scheduled Work: 2021 vs. 2020



Expected Weekly Work 2022 vs. 2021



## Better Days Ahead

Another indication that 2021 has been a better year for the security industry can be seen in the amount of scheduled work on the books for locksmiths and security pros. Our survey shows an upward trend across the board: Each category of increases improved over the previous year, and each category of decreases had a decline.

Those who report increased work schedules, either slight or significant, rose to 38.0% of all respondents in 2021, compared with 24.2% in 2020. Those who have less work scheduled dropped to 35.4%, down from more than half of all respondents (50.4%) in 2020.

More significantly, the work increase, perhaps along with improvements to bank accounts and bottom lines, seems to have provided the basis for a large increase in optimism for the year ahead.

A majority of our respondents (55.5%) expect to get more work in 2022, whereas only 14.3% expect to get less. This represents huge improvements — 32.1 percentage points and 31.5 percentage points, respectively — over the previous year.

That would seem to bode well for another year of improved finances in 2022, but that also could depend on the work that's being performed. One locksmith notes that distinction with respect to how the pandemic affected his business by the "loss of the small jobs, for example, re-keying a couple of doors, cutting furniture keys. The big projects kept us going, but the quick, profitable jobs were gone."

Hopefully, those jobs also will return and lead to more work for everyone in 2022.



## 2021 Marketing Strategies

Respondents were asked about how the current business climate has affected the marketing of their business.



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### Steady as She Goes

In the old days, marketing a locksmith business consisted of a simple strategy: a placement in the Yellow Pages, preferably as close to the top as possible, a stencil on a van, a business card and lots of good word of mouth. Those methods remain, albeit with the internet replacing the Yellow Pages, but nowadays, far more avenues are open when it comes to marketing a locksmith business.

Younger, who says his business is doing more marketing than ever before, notes that “advertising” is something of a static term.

“We’re spending more energy and effort on business development,” he says. “It’s finding customers that fit with what we’re doing or who are buying what we want to sell. It’s more of an interactive business development process than it is advertising.”

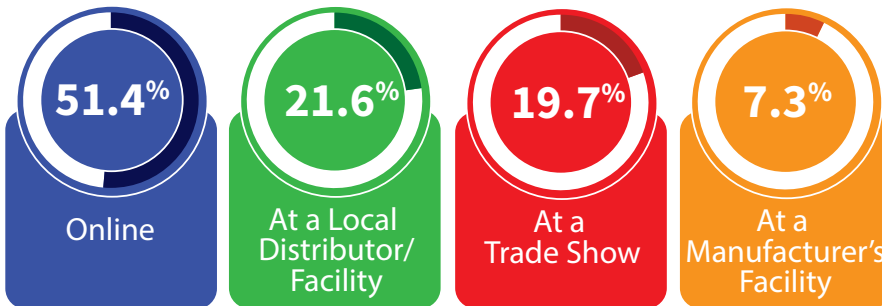
By however it’s accomplished, it’s clear that, at least in 2021, more locksmiths are sticking with their marketing strategies. More than half our respondents say they made no changes. This is quite a swing from 2020, when only 15.4% reported no change to their advertising during a year when uncertainty led to lots of changes.

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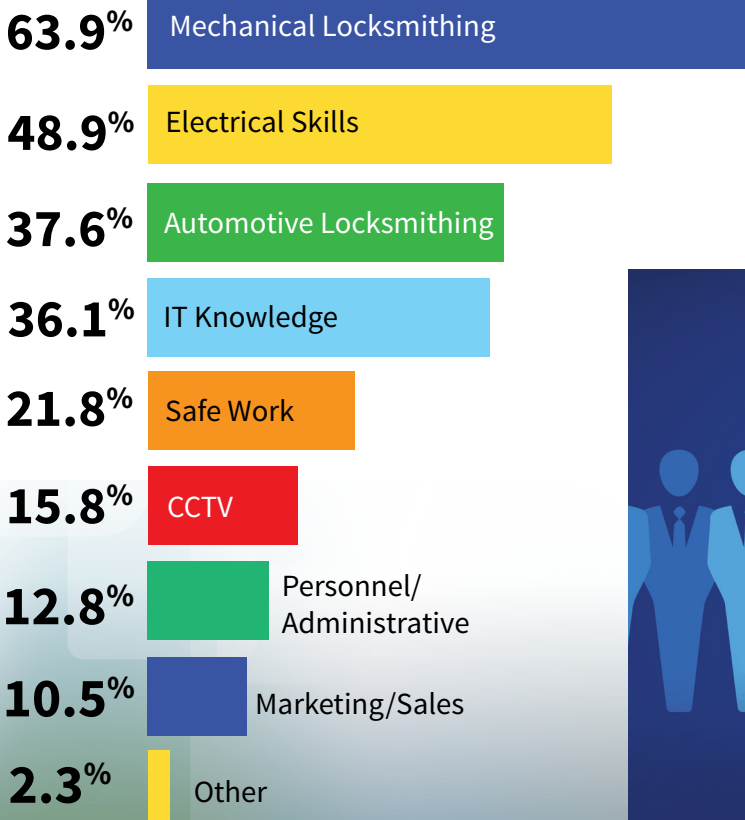
## Personnel: Training & Hiring

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

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



What specialties will you seek in future hires?



## Looking for Workers

When it comes to training and hiring, locksmiths know what they want and how they want to achieve it. The data for the two personnel categories mostly was unchanged from the previous year. Online remains by far the most popular method for training, and mechanical locksmithing remains No. 1 among hiring qualifications.

However, several locksmiths mention that they look for candidates who have skills that could apply in any field, or as one says in noting what they look for: “average body temperature; ability to learn coupled with mechanical aptitude.”

Younger says his team focuses on candidates who are “good team players. Mechanical, IT, electrical, CCTV, automotive and safes — all of those are trainable skills.”

Schwab agrees. “The problem is when you hire someone with mechanical locksmithing, they might come with bad habits,” he says. “If they’ve never been trained properly, they usually don’t work out.”



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