The Home and Small Business Security System Market

15th Edition

The Home and Small Business Security System Market is the fifteenth consecutive report from Berg Insight analysing the latest developments on the small alarm market in Europe and North America. This strategic research report from Berg Insight provides you with 130 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

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Professionally monitored alarm systems in Europe and North America reached 57 million in 2024

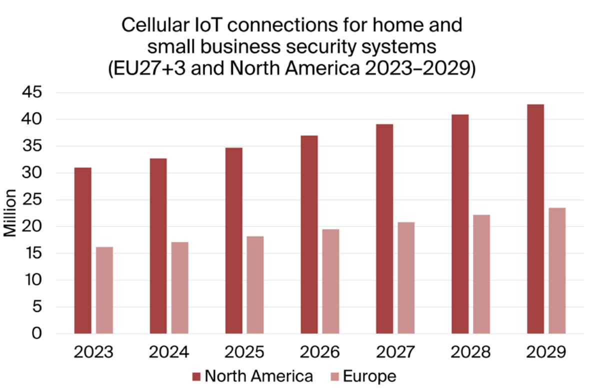
Security systems for homes and small businesses can be categorised into self-monitored and professionally monitored systems. Self-monitored systems utilise cloud-based backends to provide real-time alerts directly to the property owner via push notifications, SMS or email, allowing for immediate remote assessment through a smartphone app. A professionally monitored security system is linked to a 24/7 Alarm Receiving Centre (ARC). When the system is activated, the ARC verifies the alert and initiates a rapid response, which can include dispatching a security patrol and alerting emergency services. Traditional home security systems include professional alarm monitoring as standard. DIY home security systems primarily rely on self-monitoring, although professional alarm monitoring is often offered as an optional added service.

The North American market for home and small business security systems is almost twice the size of the European market. There were an estimated 37.2 million active monitored alarm systems in the US and Canada at the end of 2024. The overall penetration rate among the around 156 million households and small business premises in North America was 23.9 percent. Growing at a CAGR of 3.5 percent, the number of monitored alarms in North America is estimated to reach 44.1 million in 2029.

In the EU27+3, there were about 19.6 million active monitored alarm systems at the end of 2024. This corresponds to an overall penetration rate of 7.9 percent among the around 250 million households and small businesses in Europe. The market data thus indicate a significant growth potential for alarm systems in Europe, especially in the residential segment where the current penetration is only 6.5 percent. However, growth in the European market is forecasted to vary considerably from country to country in the next few years. Countries with an already established home security industry and with relatively high penetration rates, including countries such as Spain, France and Sweden, are anticipated to continue to grow faster than the European average. Other markets in Europe will show less growth due to high market fragmentation and fewer specialist alarm service companies that actively market solutions. The number of monitored home and small business alarms in Europe is estimated to grow at a CAGR of 4.6 percent, to reach 24.5 million alarm systems in 2029. In both Europe and North America, interactive security services and smart home products are key growth drivers in the home security market.

The traditional home and small business security systems market in Europe and North America is served by specialist home security companies such as ADT, Verisure, Brinks Home (Monitronics) and Sector Alarm; large security service companies such as Prosegur, Securitas and G4S (Allied Universal); telecommunications and cable television companies such as Comcast, Telus, Telefónica and Rogers; as well as banking groups and insurance companies such as Crédit Mutuel, Crédit Agricole and Groupe IMA. Providers of DIY home security systems include SimpliSafe, Frontpoint, Ring (Amazon), Yale (Assa Abloy), Arlo Technologies, Ooma, Abode Systems (Nice Group), Somfy, Netatmo (Legrand), Signify, ABUS, Bosch, ERA Home Security (Quanex Building Products) and Wyze Labs.

ADT is the leading provider of professionally monitored alarm systems in North America with 6.4 million home and small business customers at the end of 2024. In North America, ADT is followed by Vivint, SimpliSafe, Comcast, Telus and Brinks Home (Monitronics), all with between 0.8 million and 2.2 million monitored alarm system customers each at the end of 2024. In the US and Canada, only a few market players offer services nationwide and there are many small home security providers with strong local presence. In Europe, Verisure is the clear market leader with over 5.6 million home and small business customers at the end of 2024. The company is active in 13 European countries and five countries in South America. Verisure has a particularly strong position in Spain, France and the Nordic countries. Other leading players in Europe are Prosegur, EPS (Crédit Mutuel) and Sector Alarm.



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New data on alarm system adoption by country and segment.

Comprehensive overview of the home and small business alarm system value chain.

Detailed profiles of key players on the European and North American security markets.

In-depth analysis of market trends and key developments.

Market forecasts by region, lasting until 2029.

The report answers the following questions

- Who are the leading providers of monitored home and small business alarm systems?
- Why are alarm system providers investing in smart home technology?
- Are DIY home alarm systems providers a threat to the traditional players?
- What is the potential market size for cellular IoT in the alarm systems industry?
- How is AI being used by alarm system providers and what are the key drivers for adoption?
- What is the market value of the alarm system industry in Europe and North America?
- What are the latest trends and developments on this market?

About Berg Insight's IoT market research

Our market reports offer comprehensive information and analysis on key IoT technologies and markets, addressing important concerns including total addressable market, market penetration, market shares, industry landscape, regulatory environment, market trends and forecasts. Our research portfolio today comprises more than 80 items, where each market report focuses on a specific vertical application area or cover horizontal themes. All market reports come with complementary data sets in Excel format that can be easily analysed and converted into tables and charts. We offer a range of different license options together with bundled packages and subscriptions to suit your specific needs.

SMART BUILDINGS

The Home and Small Business Security System Market

Cellular connectivity is rapidly becoming a standard feature in security alarm systems for the consumer and small business markets. Berg Insight estimates the number of cellular IoT connections for home and small business security systems in Europe and North America will grow at a compound annual growth rate of 5.9 percent from 49.8 million in 2024 to 66.3 million in 2029. Learn about the business opportunities associated with wireless IoT solutions for the alarm system industry in this 130-page report covering both Europe and North America.

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Who should read this report?

The Home and Small Business Security System Market is the foremost source of information about the professionally monitored security system market in Europe and North America. Whether you are a vendor, telecom operator, investor, consultant, application developer or government agency, you will gain valuable insights from our in-depth research.

AUTHOR

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Martin is a principal analyst who specialises in IoT applications for the smart homes and buildings, transportation and security markets. He joined Berg Insight in 2018 and is the lead author of numerous research reports. In addition to published research, he has provided bespoke research to clients ranging from IoT solution providers, management consulting firms, private equity firms and others. Prior to joining Berg Insight, Martin worked as a supply chain analyst at Volvo Group. Martin holds a Master's degree in Industrial Engineering and Management from Chalmers University of Technology.

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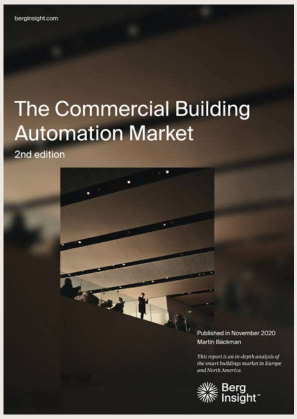

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