

2017

PSIRA Private Investigator Survey Findings



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PROJECT BRIEF

Demacon Market studies were commissioned by **PSiRA (Private Security Industry Regulatory Authority)** to perform market research surveys with different sets of private security consumers.

The purpose of these surveys is to assist PSIRA to better understand the consumer's perception of private security service providers and overall level of satisfaction.

The project brief:

In terms of the project brief it is understood that four sets of surveys had to be conducted as part of the study. These surveys had to be focused towards the following main categories of consumers:

1. **Consumers of Private Investigation Security Services** - private investigation, business investigation and polygraph services, etc. – potential consumers are all sectors.
2. Consumers of Locksmith Security Services - key coding, key cuts, burglary repairs, unlock cars, unlock house, unlock safes, etc. - potential consumers are all sectors.
3. Consumers of Response Security Services - armed and unarmed response security to residential areas and business parks - potential consumers are homeowners and managers of business parks, etc.
4. Consumers of Assets-In-Transit Security Services - high value goods / cash being transported to and from various points in the country - potential consumers are banking industry, retail industry, mining industry, etc.

The findings and analysis of each of these consumer markets had to be captured in separate market research reports. This report captures the findings of the **private investigator consumer market survey**.

PSIRA PROFILE

Before focus is turned towards the findings of the surveys a short overview is provided in terms of the mission, vision, objectives and values of PSIRA.

MISSION: To protect the constitutional rights of all people to life, safety and dignity through the effective promotion and regulation of the private security industry.

VISION: To be recognised as an excellent regulator of private security in South Africa by all our stakeholders.

OBJECTIVES: The primary objectives of the Authority are to regulate the private security industry and to exercise effective control over the practice of the occupation of a security service provider in the public and national interest and in the interest of the private security industry itself.

VALUES:

- Integrity: Ethical Conduct, Fairness, Transparency
- Excellence: Accountability, Professionalism, Performance, Accessibility
- Ubuntu: Accessibility, Respect, Compassion, Diversities.

The Authority regulates and controls the Private Security Industry through:

- Registration of service providers
- Registration of security officers
- Ensuring compliance and adherence to PSIRA Act and all other laws applicable to security service providers
- Accredited training security service provider
- Process course report submitted to us
- Receive and investigate complaints against service providers
- Prosecute non-compliance by service providers
- Advise private security consumers about private security industry
- Advise state on all matters of private security.

PROJECT METHODOLOGY

Step 1: Project Inception

Refinement of project scope.

Step 2: Survey Questionnaires Design

This step entailed the design and finalisation of the questionnaire. The Research and Development Unit of PSIRA sent through a list of potential questions that they wished to form part of the questionnaire. Making use of these questions as baseline, a more comprehensive field orientated questionnaire was developed. The questionnaire was sent to the client for final comments, after which it was finalised.

Step 3: Survey Execution

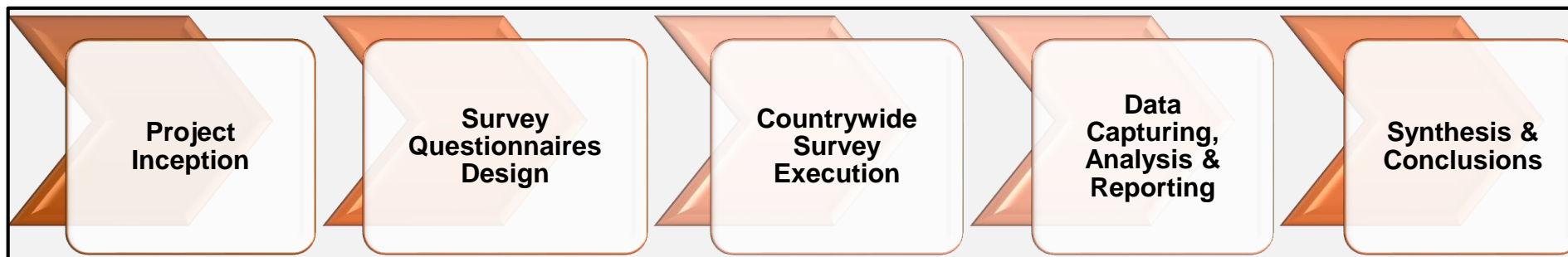
During this step the actual survey samples were estimated and broken down onto provincial levels. Detailed information is provided on the survey methodology in the next slide. After the sampling size were determined, in-house training was conducted with the surveyors executing the survey. Followed by the training was the actual execution of the survey.

Step 4: Data Capturing, Analysis and Reporting

In this step, questionnaires were sorted based on the level of completion and usability. The completed surveys were then captured into a pre-set database (in excel format). The data was then analysed from which diagrams and tables were developed. This analysis was then captured into a report format, reflecting quantitative and qualitative information on the consumer market segments. Data analysis was conducted on a national aggregate level, reflecting household and business characteristics and perceptions.

Step 5: Synthesis and Conclusion

The findings of the previous steps were integrated into a set of concluding remarks, ending of each of the individual reports.



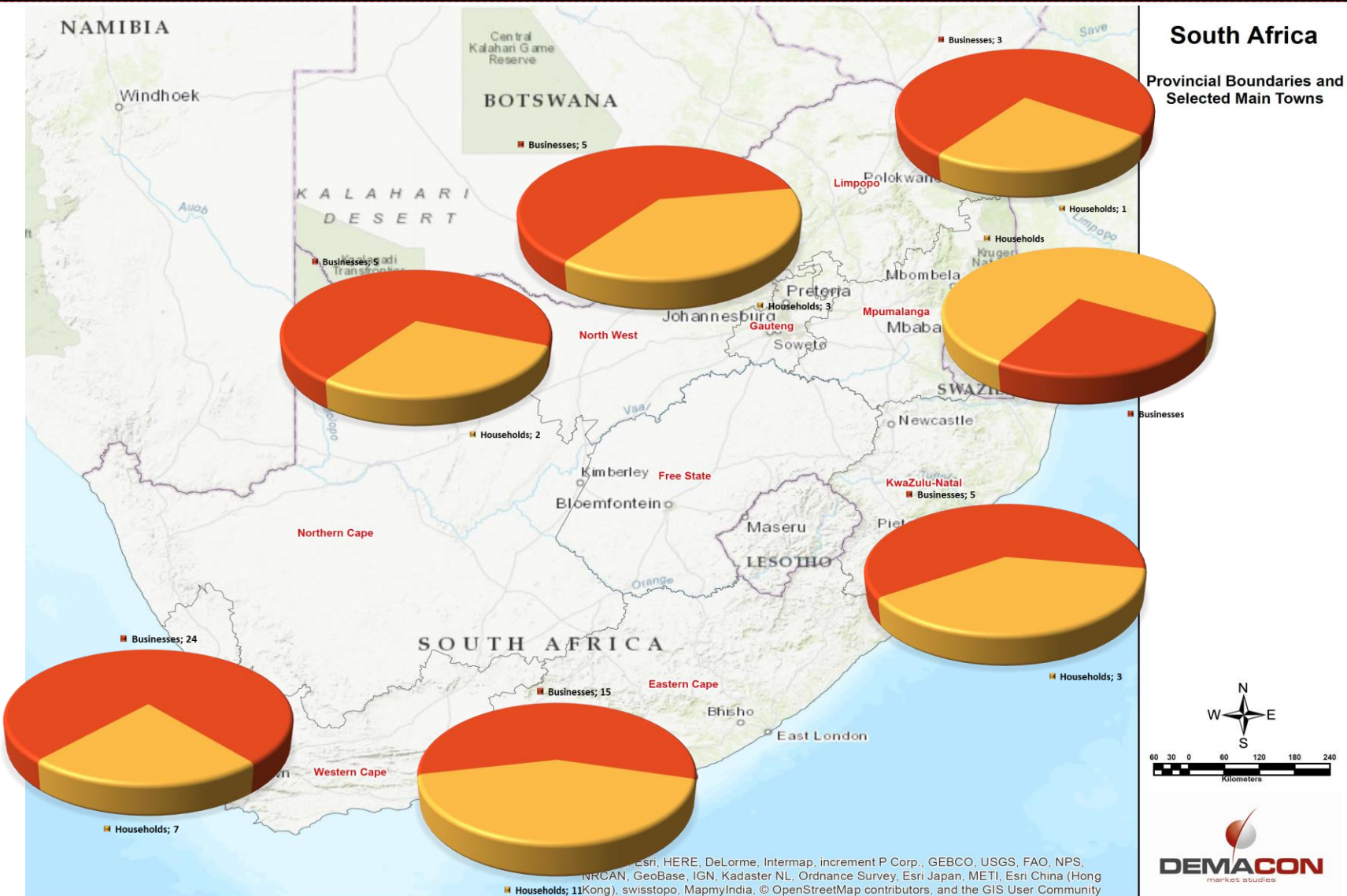
GEOGRAPHIC SPREAD OF SURVEYS

For the purpose of Private Investigator Survey, the following provincial spread was achieved – split between households and businesses per province.

Province	Total Number of Phone Numbers Contacted	Phone Numbers Contacted to Fill in Single Survey	Households	Businesses
Gauteng	600	75	3	5
Limpopo	320	80	1	3
North West	350	50	2	5
Mpumalanga	640	80	6	2
Free State	50	50	0	0
Northern Cape	50	50	0	0
Western Cape	2 325	75	7	24
Eastern Cape	1 300	50	11	15
Kwa Zulu Natal	200	25	3	5
Total	5 835	535	33	59

- A total of 5 835 numbers have been contacted, participation rate is estimated at 2%.
- 92 questionnaires were completed in full and could be successfully analysed.
- This trend indicates the fact that the utilisation of Private Investigator services are not as popular as the services of armed response security services or the utilisation of Locksmiths. The service is therefore lower in demand.
- The analysis related to the following slides have been conducted with reference to households and businesses, underlying characteristics and perceptions related to armed response services.

GEOGRAPHIC SPREAD OF SURVEYS



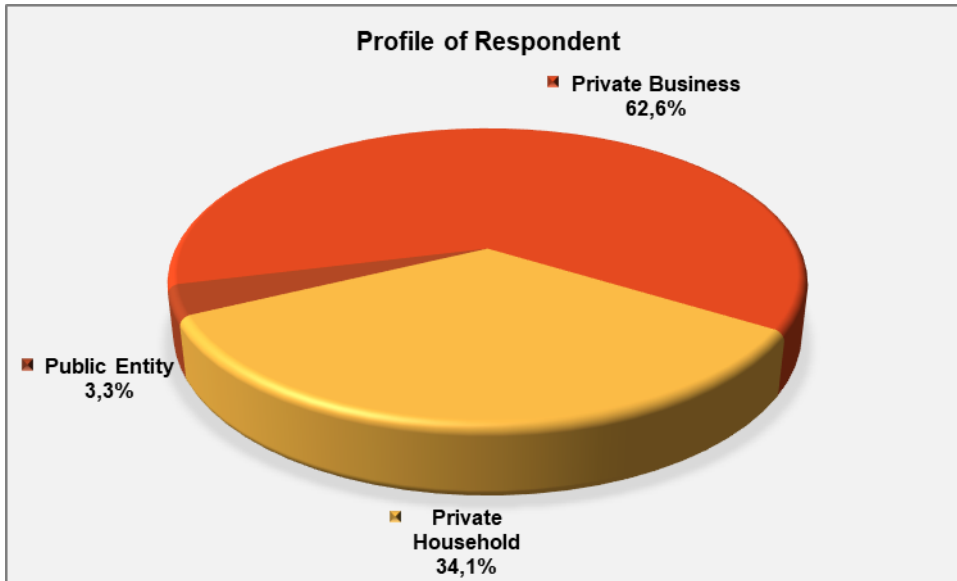


REPORT OUTLINE

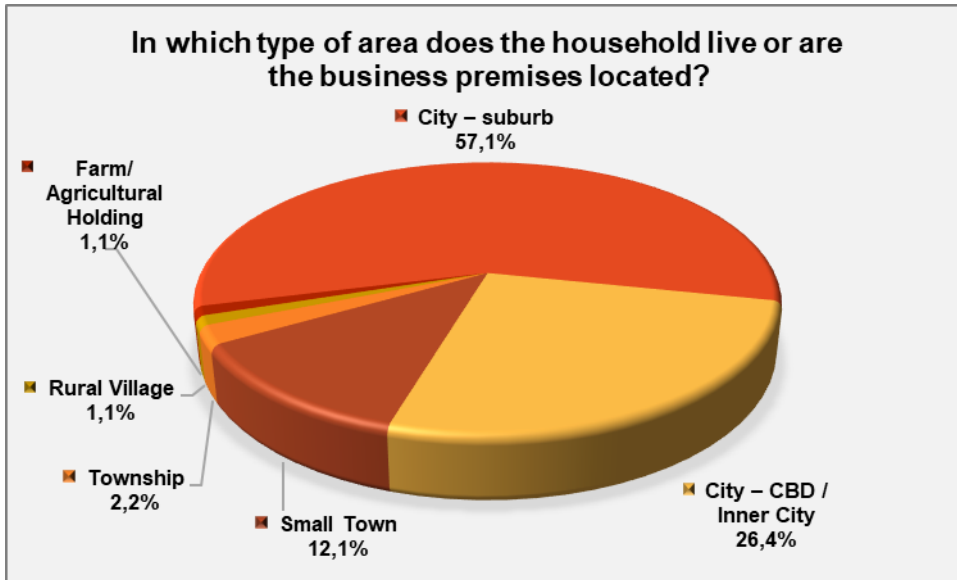
- SECTION A – INTERVIEWEE BACKGROUND
- SECTION B – HOUSEHOLD CHARACTERISTICS
- SECTION C – BUSINESS CHARACTERISTICS
- SECTION D – PRIVATE INVESTIGATOR SERVICES
- SECTION E – SUMMARY AND REMARKS

SECTION A - INTERVIEWEE BACKGROUND

- Profile of interviewee?**
- Type of area in which your residence / commercial property is located?**
- Have you or anyone in your family, ever had to use the services of a private investigator?**
- If yes, did you contract the services of a private investigator in a private or business capacity?**

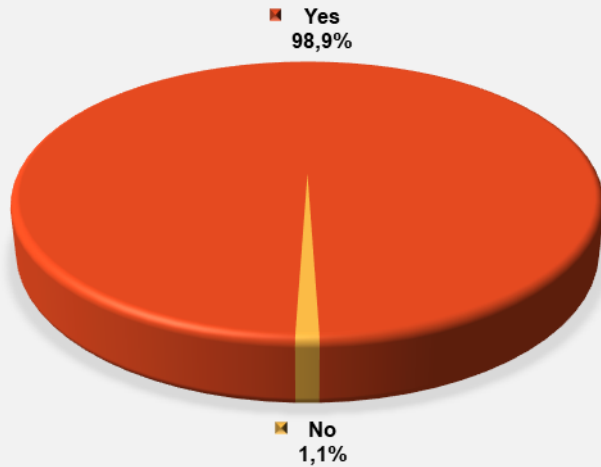


- Profile of interviewee:
- Private Businesses – 62.6%
 - Private Households – 34.1%
 - Public Entity – 3.3%.



- Respondents indicated in which type of area their residential unit or business premises are located:
- City – Suburban Area – 57.1%
 - City – Inner City – 26.4%
 - Small Town – 12.1%
 - Township Area – 2.2%
 - Rural Village – 1.1%
 - Farm/ Agricultural Holding – 1.1%.

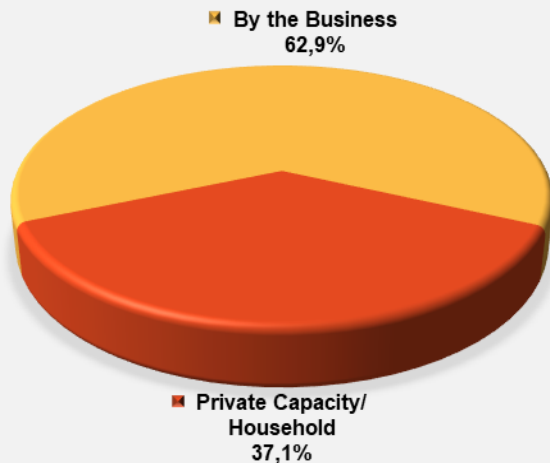
Have you or any of your family, ever had to acquire the services of a private investigator?



Respondents indicated the following in terms of whether they (or someone in their family) have ever made use of the services of a private investigator:

- Yes – 98.9%
- No – 1.1%.

Were the private investigator services contracted in a private capacity (you as person) or by the business?



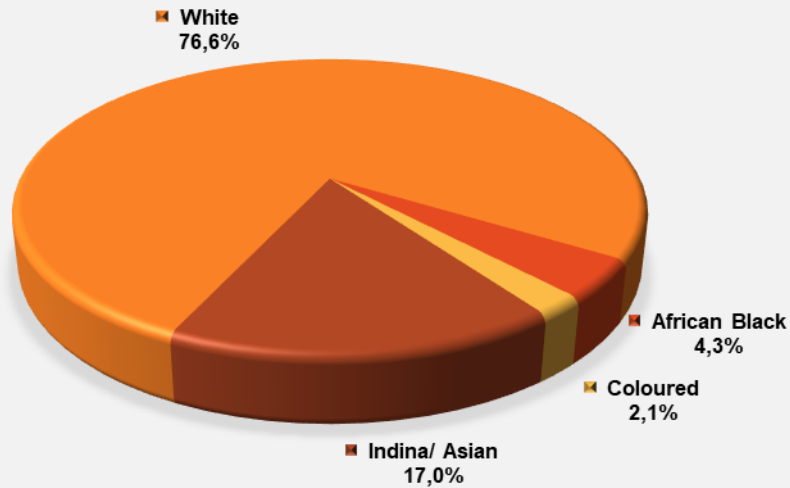
Respondents indicated that private investigator services were largely acquired within a business capacity opposed to a private household capacity:

- Business Capacity – 62.9%
- Private Capacity – 37.1%.

SECTION B - HOUSEHOLD CHARACTERISTICS

- Racial Profile of Respondent**
- Gender Profile of Respondent**
- Age Profile of Respondent**
- Average Household Size**
- Household Description**
- Number of Income Earners in Household**
- Current Employment Status**
- Average Monthly Household Income.**

Racial Profile of Respondent?

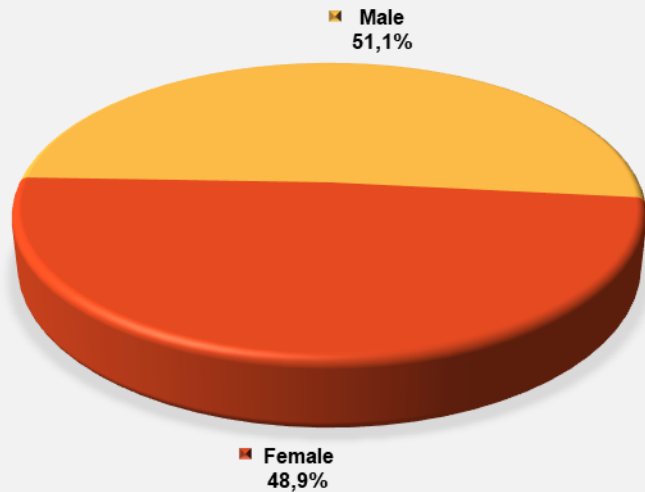


Household Respondents reflected the following Racial Profile:

- White – 76.6%**
- Indian/ Asian – 17.0%**
- African Blacks – 4.3%
- Coloured – 2.1%.

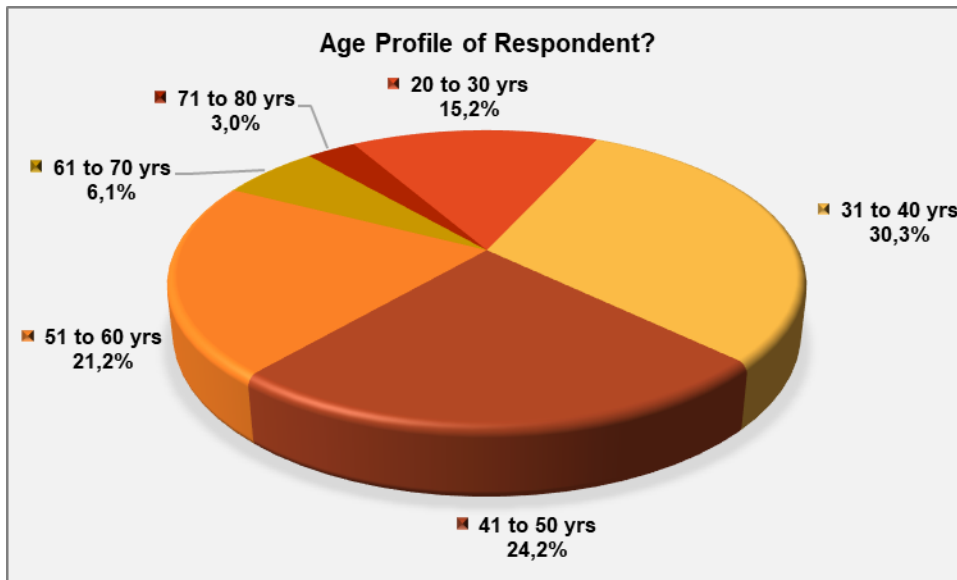
*the racial distribution of respondents does not correlate with the national racial composition of the country on account of the lower utilisation levels of these services within tribal/ rural and township areas and the specific culture groups.

Gender Profile of Respondent?



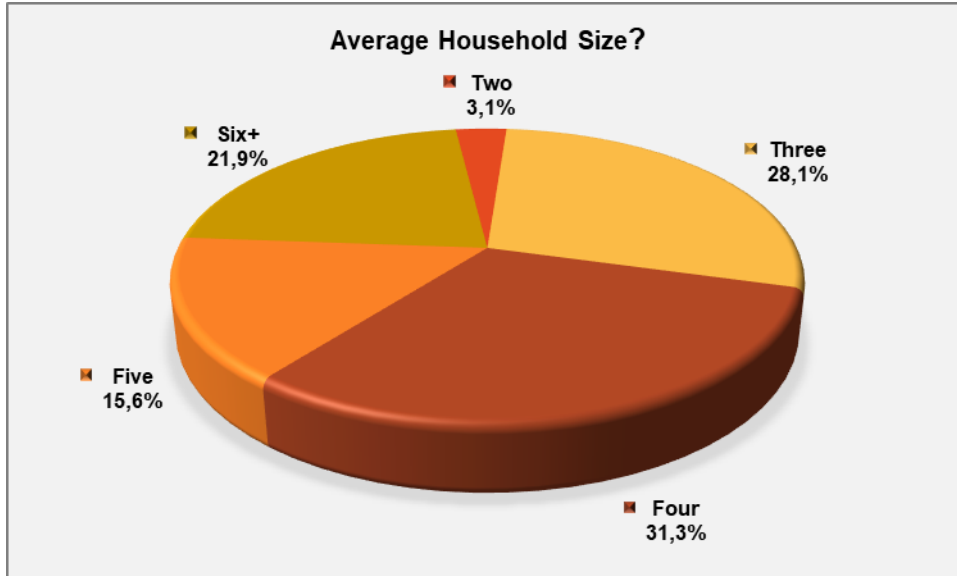
Respondents reflected the following Gender Profile:

- Male – 51.1%**
- Female – 48.9%.



Respondents reflected the following age profile:

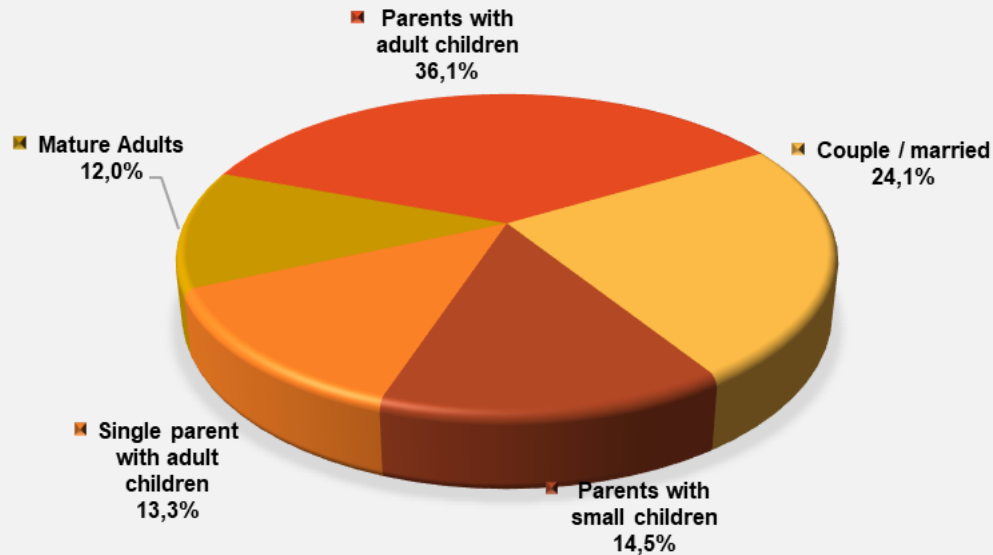
- 21 to 30 years – 15.2%
- 31 to 40 years – 30.3%**
- 41 to 50 years – 24.2%**
- 51 to 60 years – 21.2%**
- 61 to 70 years – 6.1%
- 71 to 80 years – 3.0%.



Respondents reflected the following average household sizes:

- Two members – 3.1%
- Three members – 28.1%**
- Four members – 31.3%**
- Five members – 15.6%
- Six+ members – 21.9%.

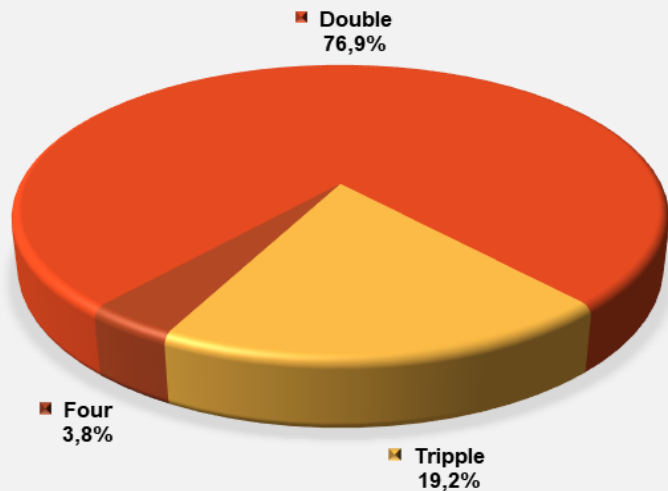
Describe your Household?



Respondents indicated the following household descriptions:

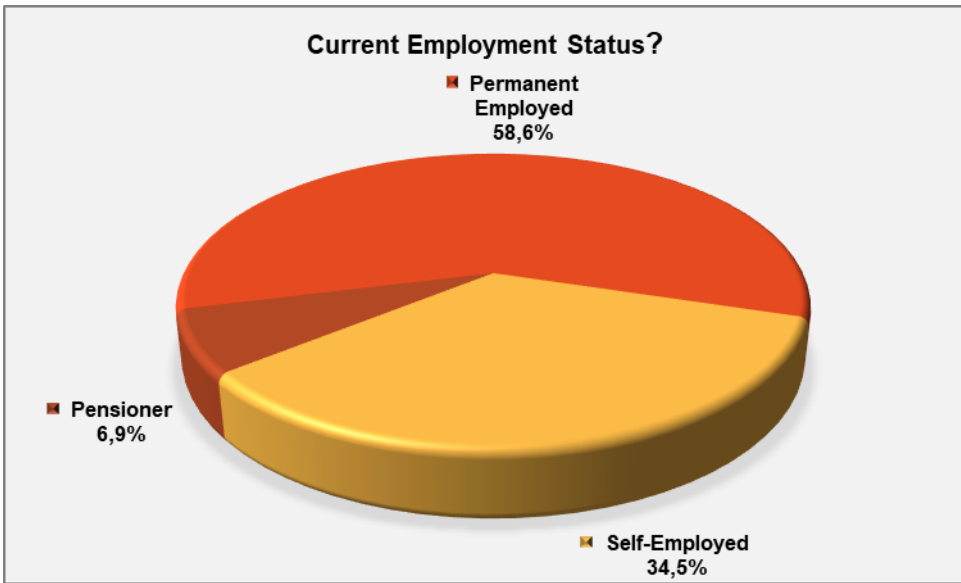
- Parents with adult children – 36.1%**
- Couple/ Married – 24.1%**
- Parents with small children – 14.5%**
- Single parent with adult children – 13.3%**
- Mature Adults – 12.0%.**

Average Number of Income-Earners by Household?



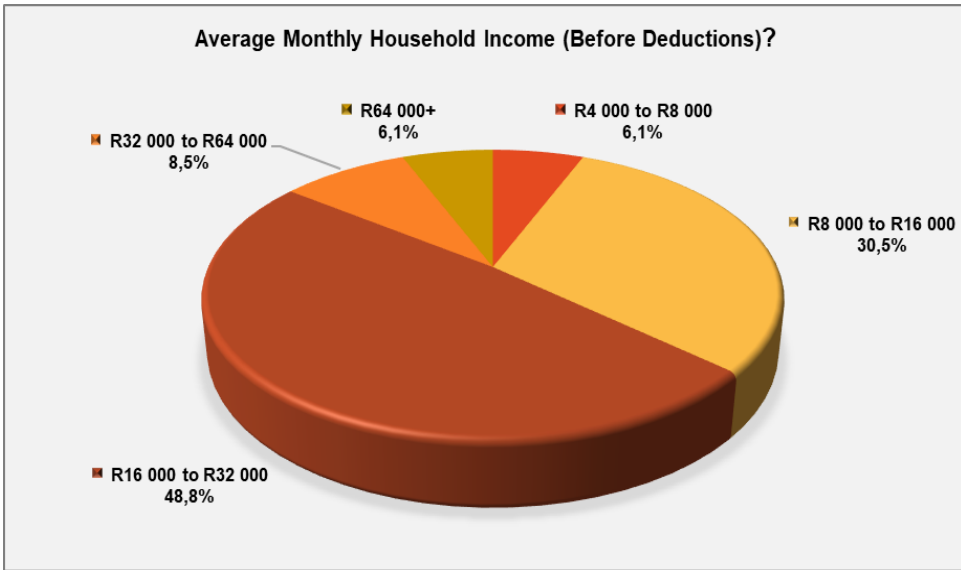
Respondents indicate the following number of breadwinners within their household:

- Double – 76.9%**
- Triple – 19.2%**
- Four - 3.8%.**



Respondents indicated their current employment status:

- Permanently employed – 58.6%**
- Self-Employed – 34.5%
- Pensioner – 6.9%.



Monthly household income (before deductions):

- R4 000 to R8 000 – 6.1%
- R8 000 to R16 000 – 30.5%**
- R16 000 to R32 000 – 48.8%**
- R32 000 to R64 000 – 8.5%
- R64 000+ - 6.1%.

SUMMARY

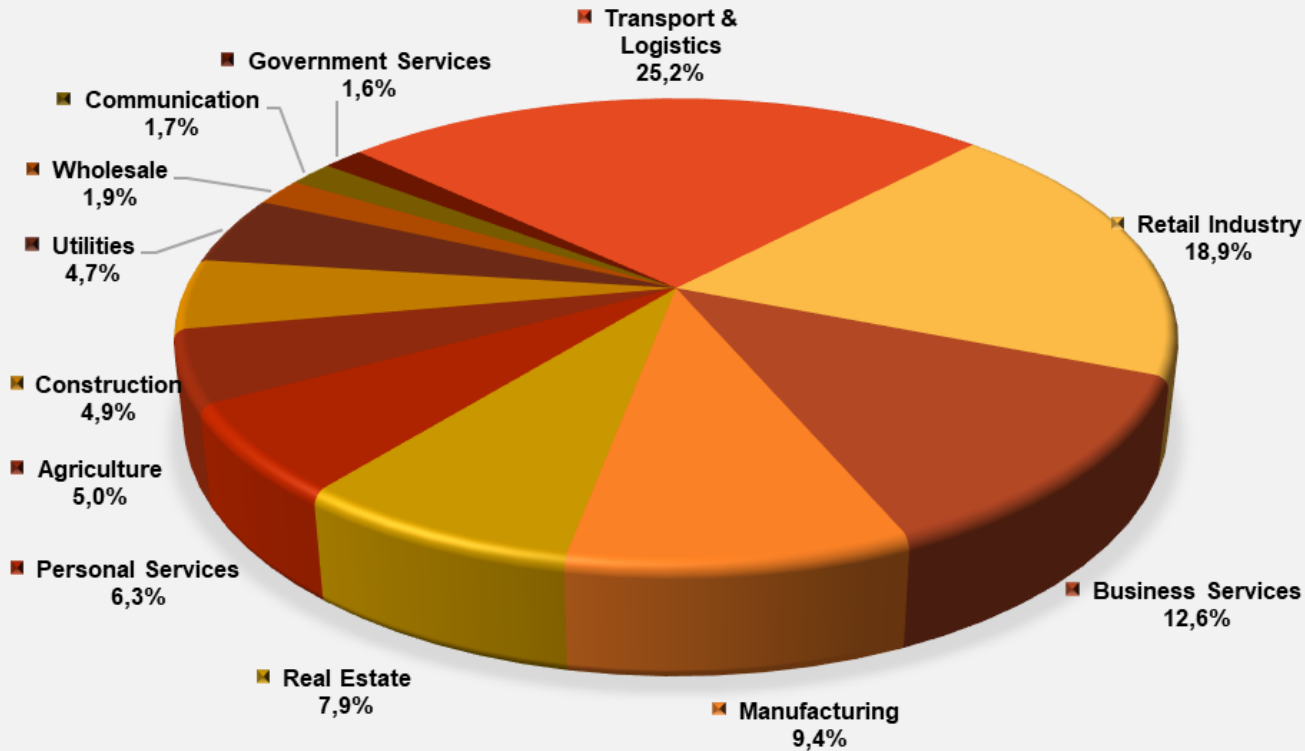
- ❑ Responding households are largely White (76.6%) and Indian Asians (17.0%)
- ❑ The racial distribution of respondents does not correlate with the national racial composition of the country on account of the lower utilisation of such services within tribal/ rural and township areas and related communities.
- ❑ A higher percentage of males respondents filled in the survey (51.1%)
- ❑ Dominant age bracket of respondents – 31 to 60 years of age (75.8%)
- ❑ Average household size of respondents – 3 to 5 members (75.0%)
- ❑ Dominant household descriptions include:
 - ❖ Parents with adult children – 36.1%
 - ❖ Couple/ Married – 24.1%
 - ❖ Parents with small children – 14.5%
 - ❖ Single parent with adult children – 13.3%
 - ❖ Mature Adults – 12.0%.
- ❑ Responding households are largely characterised by double breadwinners (76.9%), employed in permanent positions (58.6%)
- ❑ Responding households reflects middle to higher income consumers:
 - ❖ R8 000 to R16 000 – 30.5%
 - ❖ R16 000 to R32 000 – 48.8%
 - ❖ R32 000 to R64 000 – 8.5%



SECTION C – BUSINESS CHARACTERISTICS

- Economic Sector**
- Business Classification in terms of Employment**
- Age of Business**
- Business Location**

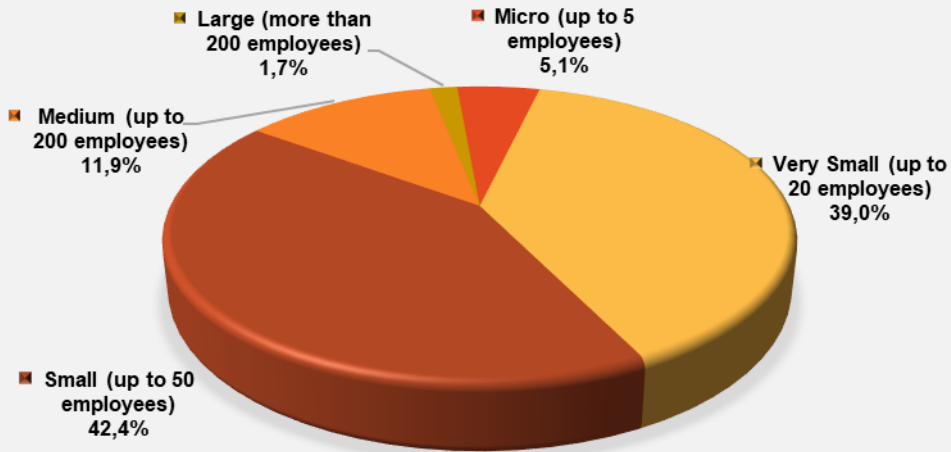
Economic Sector Classification?



Businesses indicated the following sectors their businesses are involved in:

- Transport & Logistics – 25.2%
- Retail Industry – 18.9%
- Business Services – 12.6%
- Manufacturing – 9.4%
- Real Estate – 7.9%
- Personal Services – 6.3%
- Agriculture - 5.0%
- Construction – 4.9%
- Utilities - 4.7%
- Wholesale – 1.9%
- Communication - 1.7%
- Government Services - 1.6%.

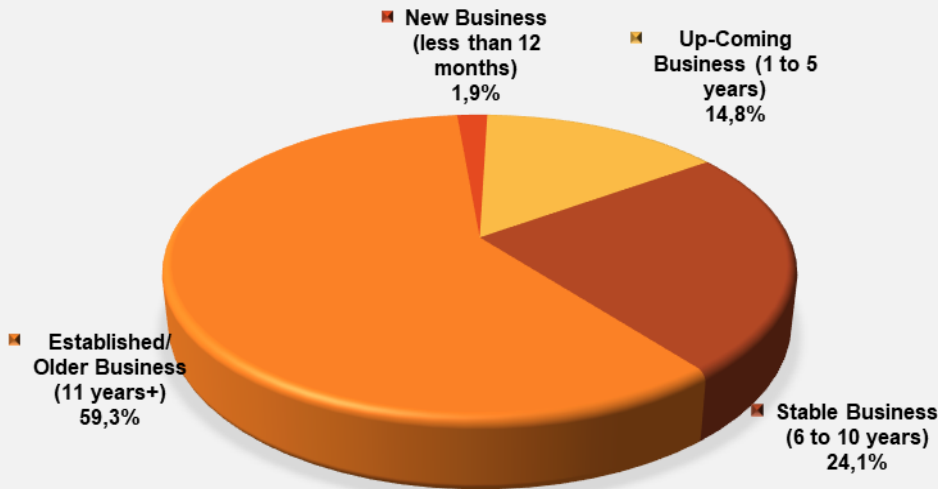
Please classify your business in terms of the number of employees:



Businesses classified their businesses according number of employees:

- Micro (up to 5 employees) – 5.1%
- Very Small (up to 20 employees) – 39.0%**
- Small (up to 50 employees) – 42.4%**
- Medium (up to 200 employees) – 11.9%
- Large (more than 200 employees) – 1.7%.

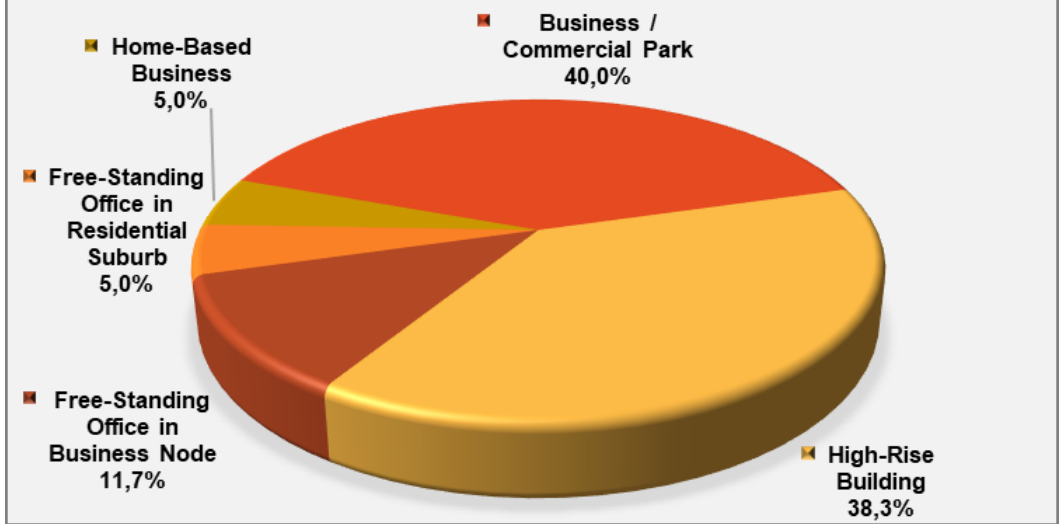
Indicate the age of your business:



Age of businesses:

- Established Business (11 years+) – 59.3%**
- Stable Business (6 to 10 years) – 24.1%**
- Up-coming Business (1 to 5 years) – 14.8%
- New Business (less than 12 months) – 1.9%.

In what type of development is your business located?



Businesses indicated that their business operations are located in the following type of developments:

- Business/ commercial parks – 40.0%**
- High-rise building – 38.3%**
- Free-standing office in business node – 11.7%
- Free-standing office in residential suburb – 5.0%
- Home-based businesses – 5.0%

SUMMARY

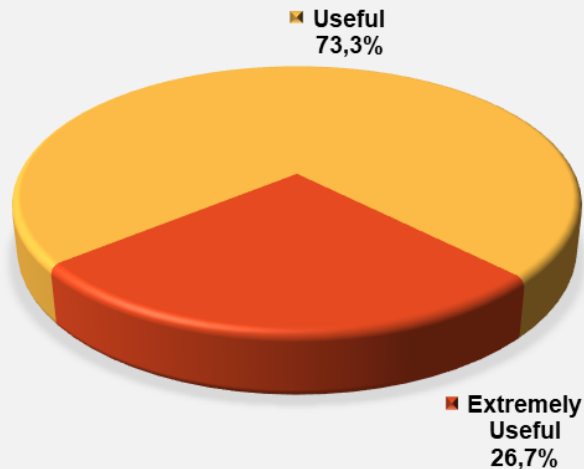
- ❑ Responding businesses are largely involved in the following economic sectors:
 - ❖ Transport & Logistics – 25.2%
 - ❖ Retail Industry – 18.9%
 - ❖ Business Services – 12.6%
 - ❖ Manufacturing – 9.4%
 - ❖ Real Estate – 7.9%
 - ❖ Personal Services – 6.3%
 - ❖ Agriculture - 5.0%
 - ❖ Construction – 4.9%
 - ❖ Utilities - 4.7%
 - ❖ Wholesale – 1.9%
 - ❖ Communication - 1.7%
 - ❖ Government Services - 1.6%.
- ❑ Responding businesses can be classified as very small (up to 20 employees) 39.0% and small (20 to 50 employees) 42.4%.
- ❑ Responding businesses represented established businesses (11years+) 59.3% and stable businesses (6 to 10 years) 24.1%.
- ❑ Responding businesses are primarily located within:
 - ❖ Business/ commercial parks – 40.0%
 - ❖ High-rise building – 38.3%.

SECTION D – PRIVATE INVESTIGATOR SUPPORT

HOUSEHOLD RESPONSE

- How would you rate the role of private investigators?
- Please indicate the private investigation services that you have made use of in the past
- Where did you source the information about which private investigator to use?
- From your perspective, how reliable has the information from the private investigator been?
- Have you ever experienced any dishonest behaviour from a private investigator?
- How would you rate the affordability of the services offered by private investigators?
- Have the costs of hiring a private investigator ever prevented you from making use of their services?
- Are you aware of any measures in place that hold private investigators accountable for the service they render?
- Did you know that by law, all private investigators operating in South Africa must be registered with PSIRA?
- Do you feel that PSIRA has any influence on the quality of services provided by private investigators?

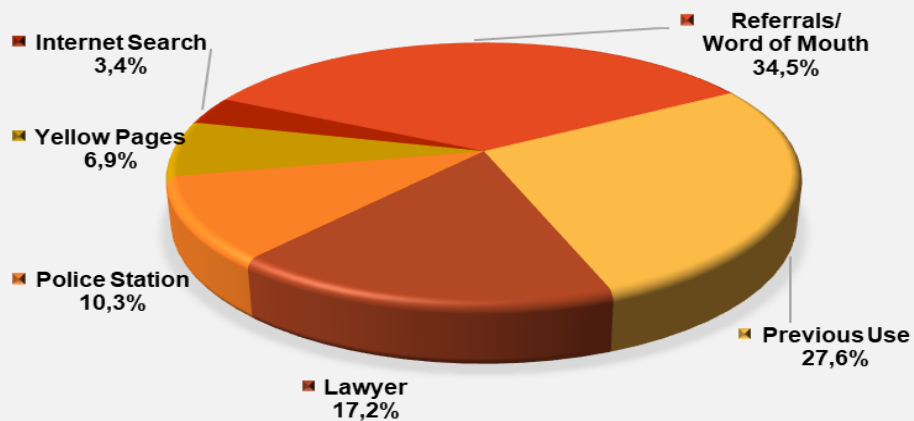
Households - How would you rate the role of private investigators?



☐ Households rated the role of private investigators as follows:

- ❖ Useful – 73.3%
- ❖ Extremely Useful – 26.7%.

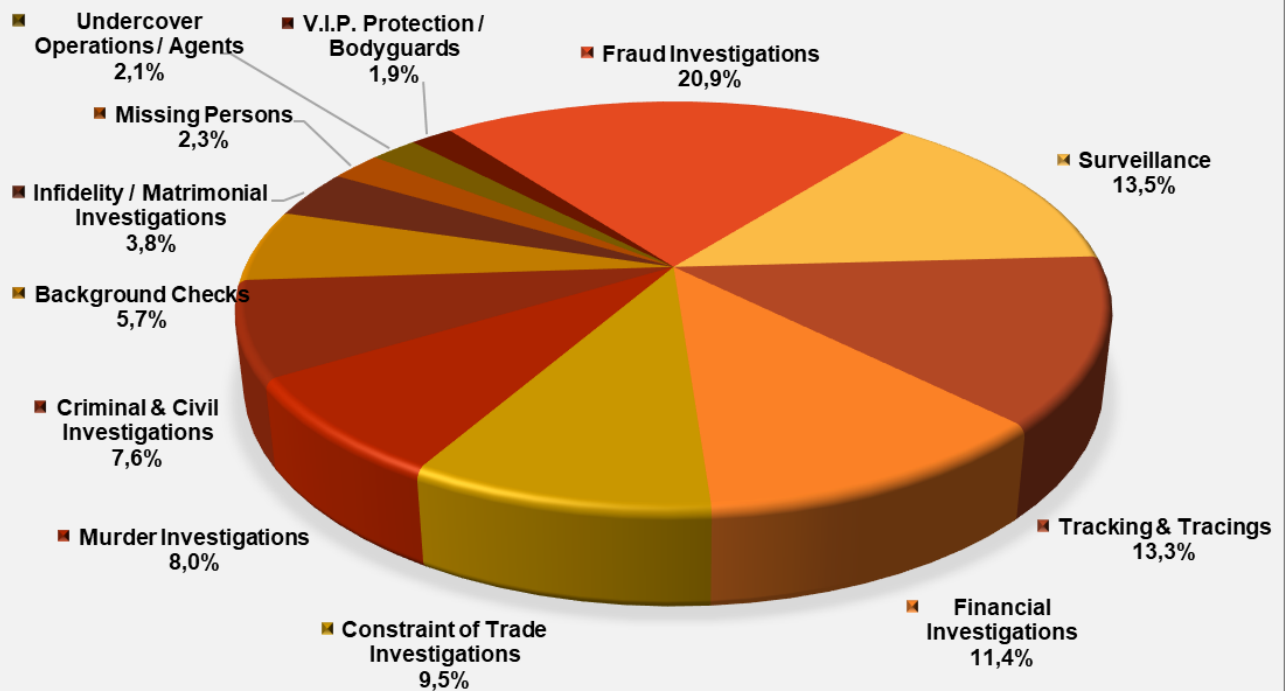
Households - Where did you source the information about which private investigator to use?



☐ Households sourced information from the following sources to determine which private investigator to use:

- ❖ Referrals/ word of mount – 34.5%
- ❖ Previous Use – 27.6%
- ❖ Lawyer – 17.2%
- ❖ Police Station – 10.3%
- ❖ Yellow Pages – 6.9%
- ❖ Internet Search – 3.4%.

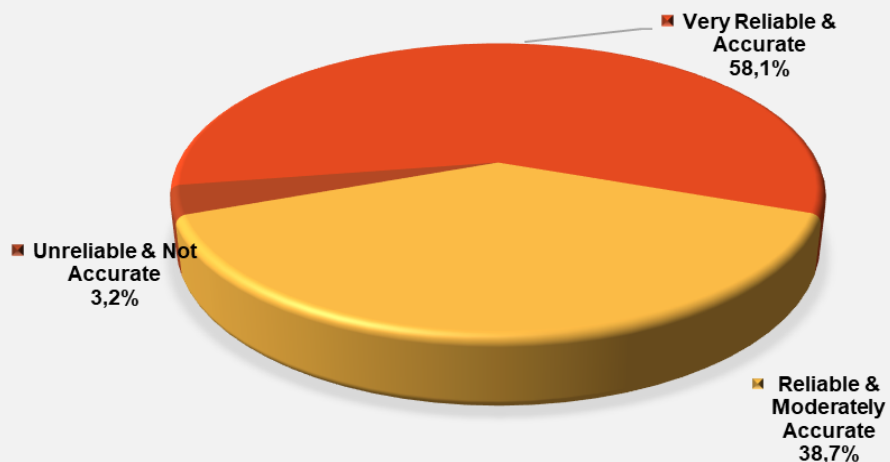
Households - Private investigator services you have made use of in the past?



Households indicated that they made use of the following services offered by private investigators:

- Fraud Investigations – 20.9%
- Surveillance – 13.5%
- Tracking & Tracing – 13.3%
- Financial Investigations – 11.4%
- Constraints of Trade Investigations – 9.5%
- Murder Investigations – 8.0%
- Criminal & Civil Investigations – 7.6%
- Background Checks – 5.7%
- Infidelity Investigations – 3.8%
- Missing Persons – 2.3%
- Undercover Operations – 2.1%

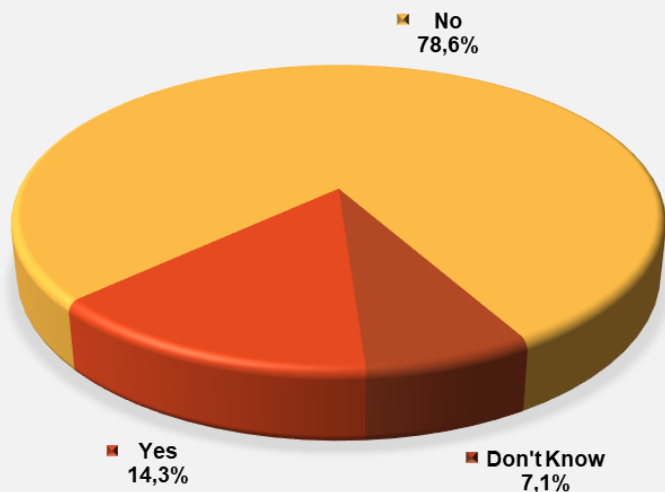
Households - From your perspective, how reliable has the information from the private investigator been?



☐ In terms of the reliability of the information obtained from the private investigators, households responded as follows:

- ❖ **Very reliable & accurate – 58.1%**
- ❖ **Reliable & moderately accurate – 38.7%**
- ❖ **Unreliable & not accurate – 3.2%.**

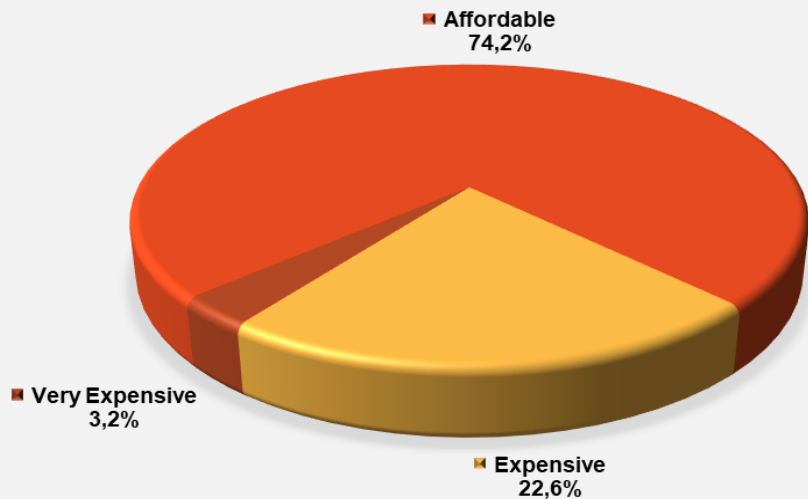
Households - Have you ever experienced any dishonest behaviour from a private investigator?



☐ Households largely indicated that they have not experienced any dishonest behaviour from the private investigator they made use of:

- ❖ **No dishonesty – 78.5%**
- ❖ **Yes – 14.3%**
- ❖ **Not aware of any dishonesty – 7.1%.**

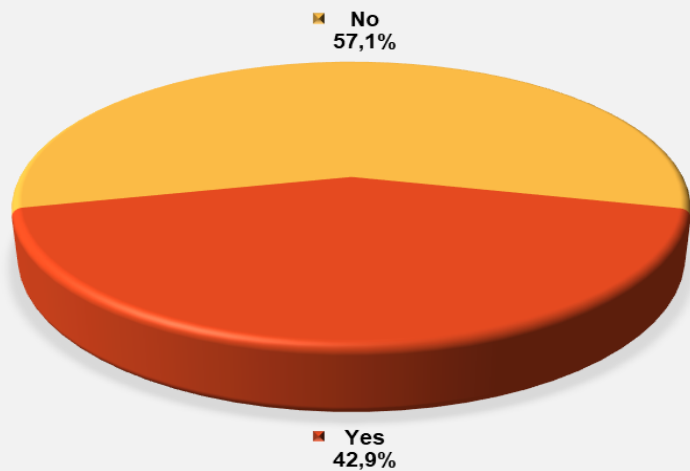
Households - How would you rate the affordability of the services offered by private investigators?



On the question of how affordable the services of private investigators are, the following answers were provided:

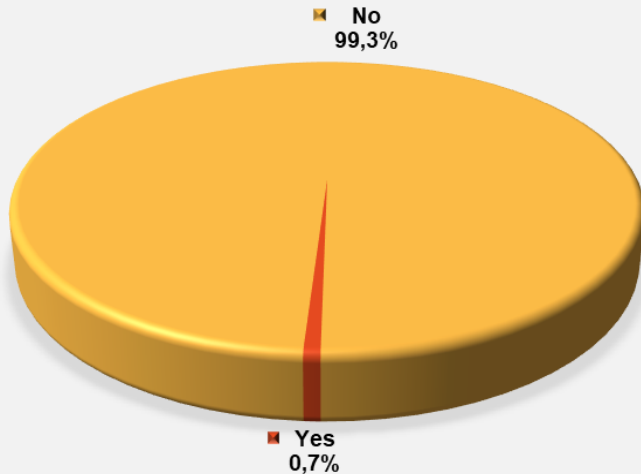
- ❖ **Affordable – 74.2%**
- ❖ **Expensive – 22.6%**
- ❖ **Very Expensive – 3.2%.**

Households - Have costs of hiring a private investigator ever prevented you from making use of their services?



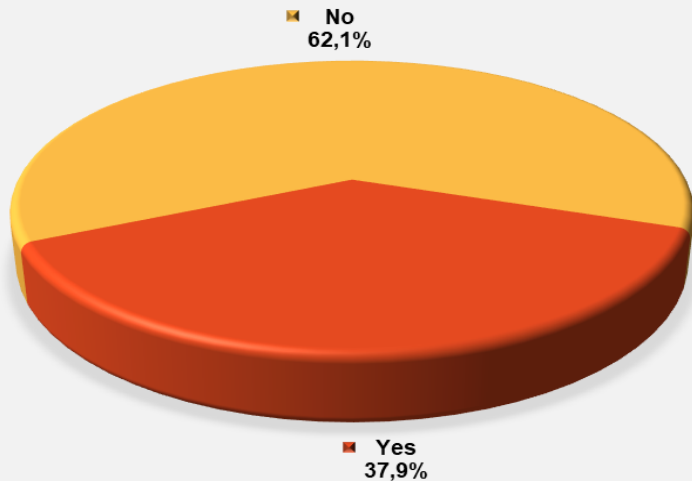
Despite the affordability rating of services indicated by households, ±43% of households indicated that the costs of hiring a private investigator has prevented them from making use of their services.

Households - Are you aware of any measures in place that hold private investigators accountable for their services delivered?



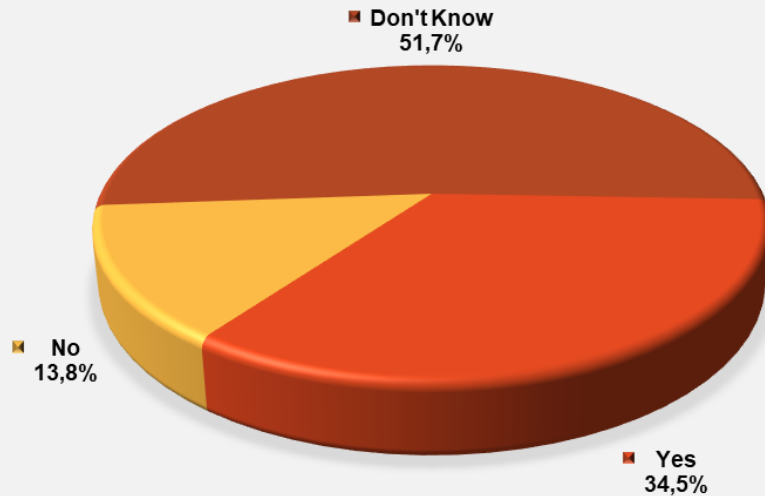
Households indicated that they are not aware of any measures in place that hold private investigators accountable for their services delivered - ±99%.

Households - Did you know that all private investigators operating within South Africa must be registered with the Private Security Industry Regulatory Authority (PSIRA)?



A moderate segment of households (±38%) indicated that they are aware that private investigators in South Africa must be registered with PSIRA.
 ±62% of households however, reflected that they were not aware that private investigators in South Africa must be registered with PSIRA.

Households - Do you feel that the Private Security Industry Regulatory Authority (PSIRA) has any influence on the quality of services provided by private investigators?



- ❑ Households largely did not know if PSIRA has any influence on the quality of services offered by private investigators - ±52%.
- ❑ ±35% of households are of the perception that PSIRA has influence over the quality of services.
- ❑ ±14% of households are of the perception that PSIRA has no influence over the quality of services offered by private investigators in South Africa.

SUMMARY

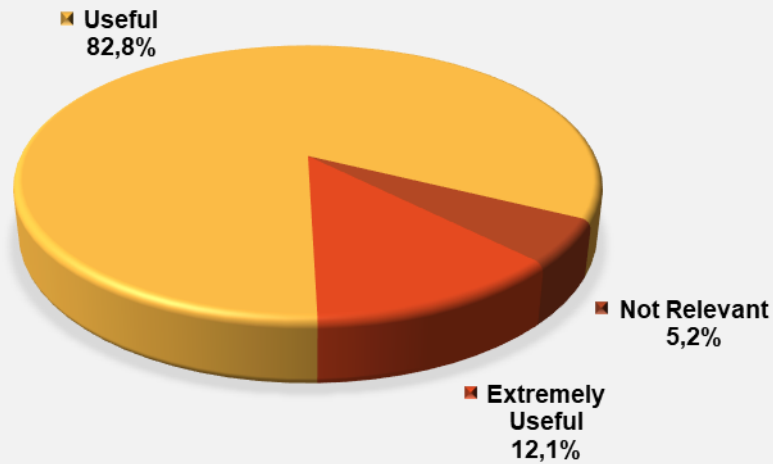
- ❑ Households rated the role of private investigators as useful ($\pm 73\%$) to extremely useful ($\pm 27\%$).
- ❑ Households sourced information on which private investigator to use predominantly from:
 - ❖ Referrals/ word of mouth – 34.5%
 - ❖ Previous Use – 27.6%
 - ❖ Lawyer – 17.2%.
- ❑ Households made use of private investigators for the following key services:
 - ❖ Fraud Investigations – 20.9%
 - ❖ Surveillance – 13.5%
 - ❖ Tracking & Tracing – 13.3%
 - ❖ Financial Investigations – 11.4%
 - ❖ Constraints of Trade Investigations – 9.5%
 - ❖ Murder Investigations – 8.0%
 - ❖ Criminal & Civil Investigations – 7.6%
 - ❖ Background Checks – 5.7%.
- ❖ Information obtained from private investigators are very reliable and accurate ($\pm 58\%$).
- ❖ Private investigators in general reflect honest behaviour ($\pm 79\%$).
- ❖ Costs of services are rated as affordable ($\pm 74\%$).
- ❖ A segment of households rated costs as expensive to very expensive ($\pm 26\%$), resulting in $\pm 43\%$ of respondents indicating that it resulted in them not using their services.
- ❖ Nearly no awareness was reflected towards measures holding private investigators accountable for their services rendered - $\pm 99\%$.
- ❖ A moderate segment of households ($\pm 38\%$) indicated that they are aware that private investigators in South Africa must be registered with PSIRA.
- ❖ $\pm 35\%$ of households are of the perception that PSIRA has influence over the quality of services.

SECTION D – PRIVATE INVESTIGATOR SERVICES

BUSINESS RESPONSE

- How would you rate the role of private investigators?
- Please indicate the private investigation services that you have made use of in the past
- Where did you source the information about which private investigator to use?
- From your perspective, how reliable has the information from the private investigator been?
- Have you ever experienced any dishonest behaviour from a private investigator?
- How would you rate the affordability of the services offered by private investigators?
- Have the costs of hiring a private investigator ever prevented you from making use of their services?
- Are you aware of any measures in place that hold private investigators accountable for the service they render?
- Did you know that by law, all private investigators operating in South Africa must be registered with PSIRA?
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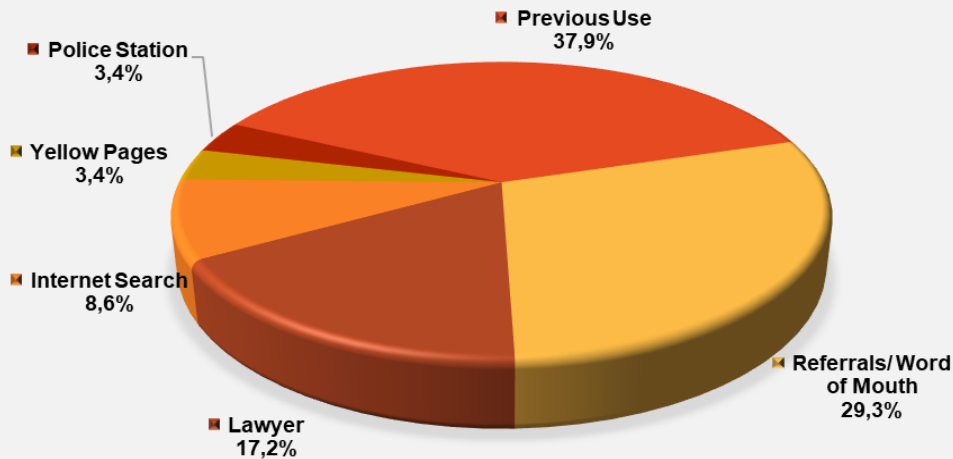
Businesses - How would you rate the role of private investigators?



☐ Business respondents rated the role of private investigators as follows:

- ❖ Useful – 82.8%
- ❖ Extremely Useful – 12.1%
- ❖ Not relevant – 5.2%.

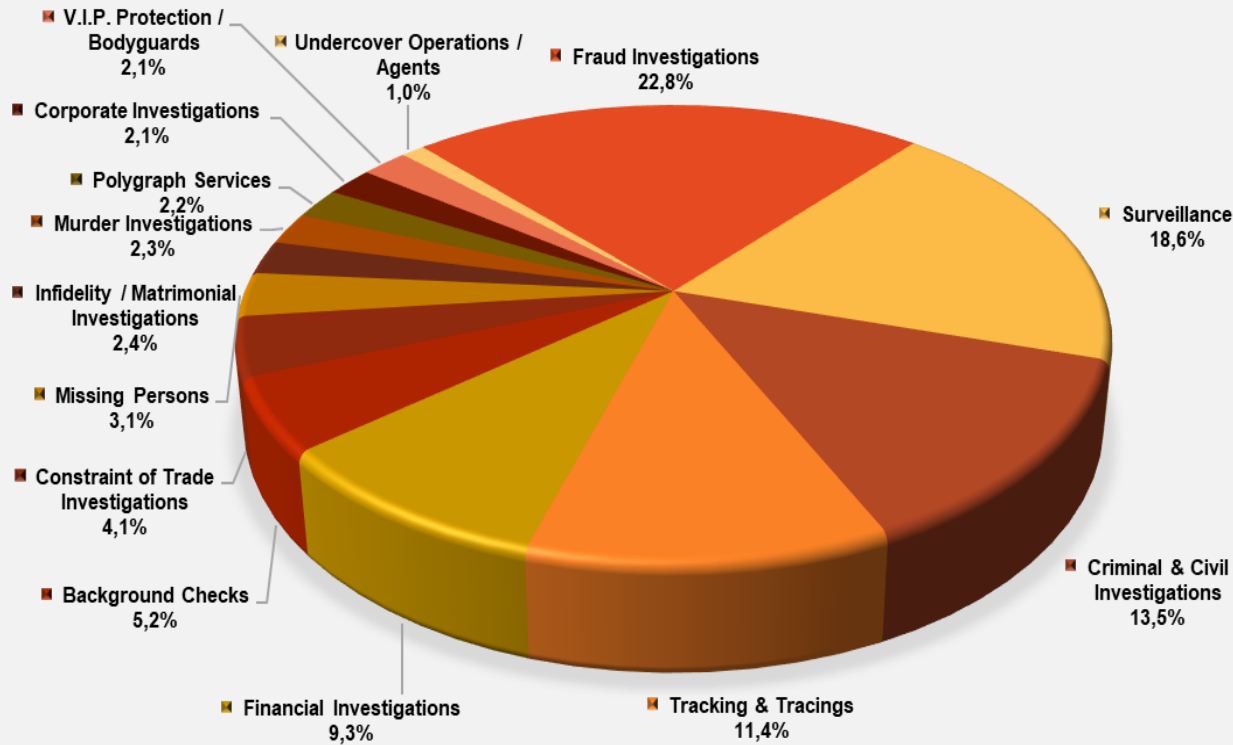
Businesses - Where did you source the information about which private investigator to use?



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- ❖ Previous Use – 37.9%
- ❖ Referrals/ word of mouth – 29.3%
- ❖ Lawyer – 17.2%
- ❖ Internet search – 8.6%
- ❖ Yellow Pages – 3.4%
- ❖ Police Station – 3.4.

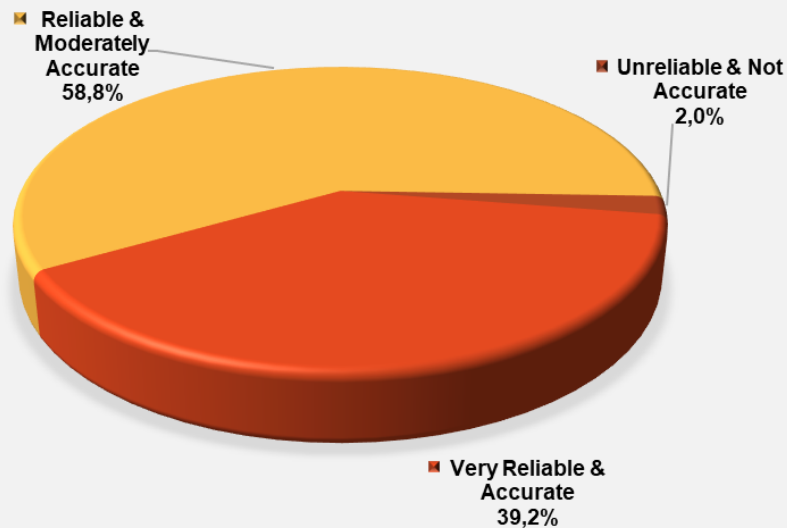
Businesses - Private investigator services you have made use of in the past?



Businesses indicated that they made use of the following services offered by private investigators:

- Fraud Investigations – 22.8%
- Surveillance - 18.6%
- Criminal & Civil Investigation – 13.5%
- Tracking & Tracings – 11.4%
- Financial Investigations – 9.3%
- Background Checks - 5.2%
- Constraint of Trade Investigations – 4.1%
- Missing Persons – 3.1%
- Infidelity / Matrimonial Investigations – 2.4%
- Murder Investigations – 2.3%
- Polygraph Services – 2.2%
- Corporate Investigations – 2.1%
- V.I.P. Protection / Bodyguards – 2.1%
- Undercover Operations / Agents – 1.0%.

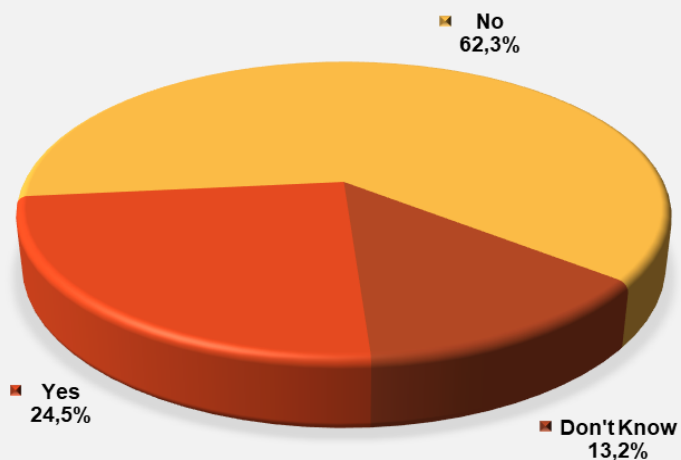
Businesses - From your perspective, how reliable has the information from the private investigator been?



In terms of the reliability of the information obtained from the private investigators, businesses responded as follows:

- ❖ **Reliable & moderately accurate – 58.8%**
- ❖ **Very reliable & accurate – 39.2%**
- ❖ **Unreliable & not accurate – 2.0%.**

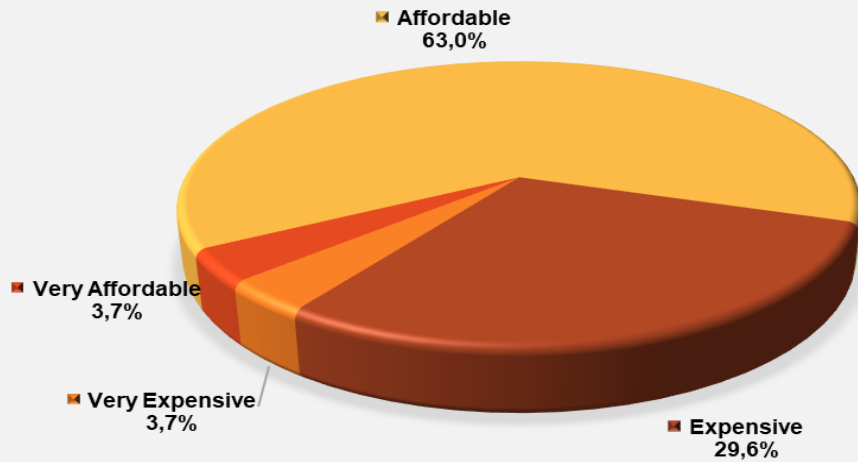
Businesses - Have you ever experienced any dishonest behaviour from a private investigator?



Businesses largely indicated that they have not experienced any dishonest behaviour from the private investigator they made use of:

- ❖ **No dishonesty – 62.3%**
- ❖ **Yes – 24.5%**
- ❖ **Not aware of any dishonesty – 13.2%.**

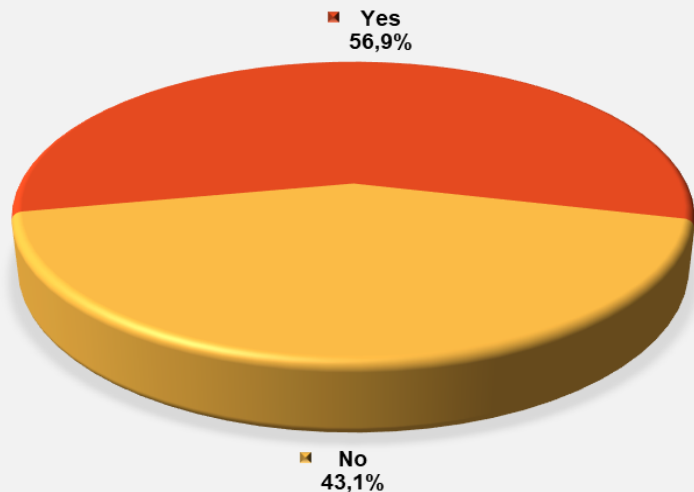
Businesses - How would you rate the affordability of the services offered by private investigators?



☐ On the question of affordability, business respondents indicated the following:

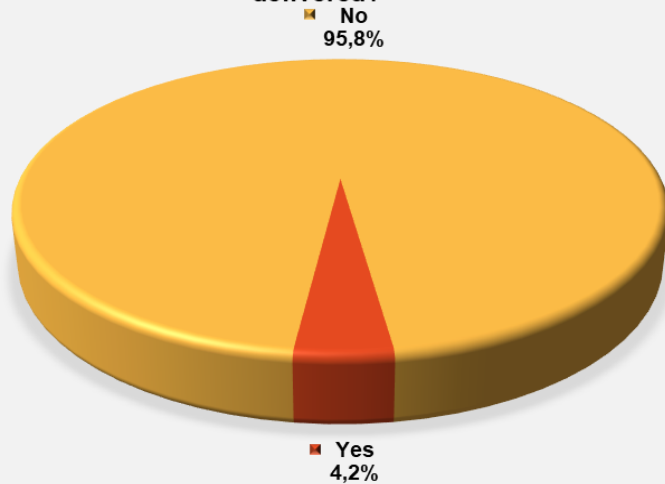
- ❖ Very Affordable – 3.7%
- ❖ **Affordable – 63.0%**
- ❖ **Expensive – 29.6%**
- ❖ Very Expensive – 3.7%.

Businesses - Have costs of hiring a private investigator ever prevented you from making use of their services?



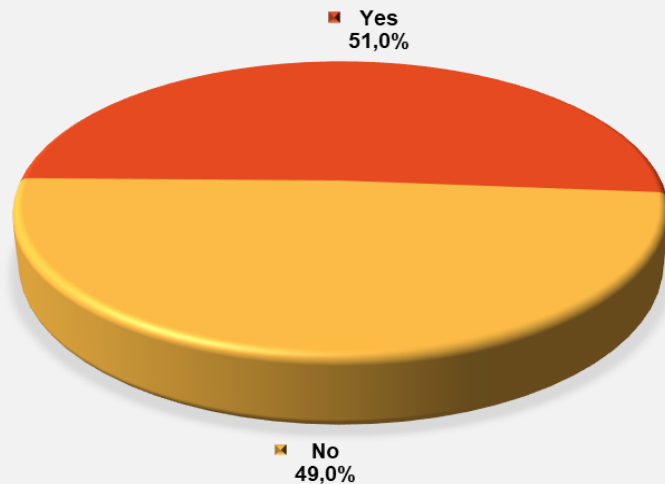
- ☐ ±57% of businesses indicated that the costs of hiring a private investigator has not prevented them from making use of their services.
- ☐ ±43% of businesses reflected the opposite, indicating that costs prevented them from making use of their services.

Businesses - Are you aware of any measures in place that hold private investigators accountable for their services delivered?



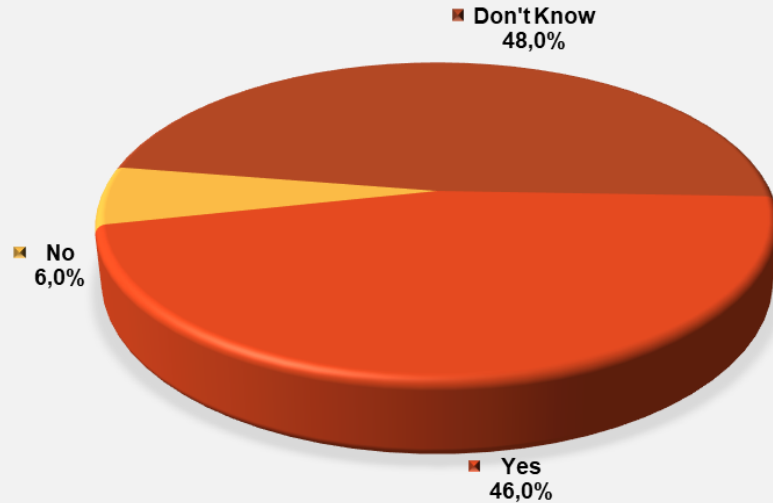
- Business respondent indicated that they are largely not aware of any measures in place that hold private investigators accountable for their services delivered - ±96%.
- A mere ±4% of responding businesses indicated selective knowledge of measures in place.

Businesses - Did you know that all private investigators operating within South Africa must be registered with the Private Security Industry Regulatory Authority (PSIRA)?



- Just more than half of responding businesses (±51%) indicated that they are aware that private investigators in South Africa must be registered with PSIRA.
- ±49% of businesses however, reflected that they were not aware that private investigators in South Africa must be registered with PSIRA.

Businesses - Do you feel that the Private Security Industry Regulatory Authority (PSIRA) has any influence on the quality of services provided by private investigators?



- ❑ A mere ±6% of responding businesses are of the perception that PSIRA has no influence over the quality of services of private investigators.
- ❑ ±46% of responding businesses indicated that they feel that PSIRA has influence on the quality of services provided by private investigators.
- ❑ ±48% of business respondents indicated that they do not know.

SUMMARY

- ❑ Businesses rated the role of private investigators as useful ($\pm 83\%$) to extremely useful ($\pm 12\%$).
- ❑ Responding businesses sourced information on which private investigator to use predominantly from:
 - ❖ **Previous Use – 37.9%**
 - ❖ **Referrals/ word of mouth – 29.3%**
 - ❖ Lawyer – 17.2%.
- ❑ Responding businesses made use of the following dominant private investigator services:
 - ❖ Fraud Investigations – 22.8%
 - ❖ Surveillance - 18.6%
 - ❖ Criminal & Civil Investigation – 13.5%
 - ❖ Tracking & Tracings – 11.4%
 - ❖ Financial Investigations – 9.3%
 - ❖ Background Checks - 5.2%
 - ❖ Constraint of Trade Investigations – 4.1%
 - ❖ Missing Persons – 3.1%.
- ❖ Information obtained from private investigators were viewed as reliable and moderately accurate ($\pm 59\%$), and $\pm 62\%$ of respondents perceived their behaviour as honest.
- ❖ Costs of services are rated as affordable ($\pm 63\%$), opposed to $\pm 33\%$ rating it as expensive to very expensive.
- ❖ $\pm 57\%$ of respondents indicating that the expensive costs of services refrained them from acquiring it.
- ❖ Nearly no awareness was reflected towards measures holding private investigators accountable for their services rendered - $\pm 96\%$.
- ❖ Just more than half of business respondents ($\pm 51\%$) indicated that they are aware that private investigators in South Africa must be registered with PSIRA.
- ❖ $\pm 46\%$ of responding households are of the perception that PSIRA has some influence over the quality of services provided by private investigators, with $\pm 48\%$ of respondents indicating that they do not know.

A black and white photograph showing a person's hands holding a pen over a document. The person is wearing a dark jacket and a light-colored shirt. The document is partially visible, showing some text and a circular stamp. A white rectangular text box is overlaid on the center of the image, containing the text "SECTION E – SUMMARY AND REMARKS".

SECTION E – SUMMARY AND REMARKS

SUMMARY AND CONCLUDING REMARKS

Role of Private Investigators:

- Household and business respondents reflected the role of private investigators as useful to extremely useful.
- This indicates that this represents a required service nationally.

Sourcing of Private Investigator:

- Households and Business respondents sourced private investigators via:
 - ❖ Previous use
 - ❖ Word of mouth / referrals
 - ❖ Lawyers.

Services Used (Top 5):

- Households largely used the following key services:
 - ❖ Fraud Investigations
 - ❖ Surveillance
 - ❖ Tracking & Tracing
 - ❖ Financial Investigations
 - ❖ Constraints of Trade Investigations.
- Businesses largely used the following key services:
 - ❖ Fraud Investigations
 - ❖ Surveillance
 - ❖ Criminal & Civil Investigation
 - ❖ Tracking & Tracings
 - ❖ Financial Investigations.

Reliability of Information:

- The information provided by private investigators were rated as very reliable and accurate by households and reliable and moderately accurate by business respondents.

SUMMARY AND CONCLUDING REMARKS

Dishonest/ Corrupt Behaviour:

- Households and businesses indicated that they have not experienced dishonest or corrupt behaviour from private investigators used.

Affordability of Private Investigator Services:

- Households and businesses rated the services offered largely as affordable ($\pm 74\%$ of households and $\pm 63\%$ of businesses).
- A moderate percentage of respondents ($\pm 26\%$ of households and $\pm 33\%$ of businesses) rated the costs as expensive to very expensive.
- $\pm 43\%$ of households and $\pm 57\%$ of businesses indicated that the costs associated with the services of private investigators refrained them from using their services.

Measures in place for Accountability:

- Almost none of the households or businesses were aware of any measures in place that holds private investigators accountable for their services offered.

Registration with PSIRA:

- $\pm 38\%$ of households and $\pm 51\%$ of businesses had knowledge on the fact that private investigators operating in South Africa are by law obligated to be registered with PSIRA.

PSIRA influence on Quality of Service Provided:

$\pm 35\%$ of households and $\pm 46\%$ of businesses were of the perception that PSIRA has some influence on the quality of services provided by the private investigator industry.

SUMMARY AND CONCLUDING REMARKS

Overall, private investigator services are not as commonly used such as armed response services or locksmith services. The private investigator industry in general is viewed as honest, effective and generally affordable. Limited knowledge are reflected on measures holding the industry accountable for their services.

Higher awareness levels are recorded under business respondents on private investigators obligation to be registered within PSIRA, compared to households. A moderate segment of respondents were of the opinion that PSIRA had some influence on the quality of services offered by the industry.

LIST OF SOURCES

- DEMACON MARKET STUDIES. 2017. PSIRA Private Investigator Survey and Analysis.