

The Fire Safety Buyers Report 2026

Understanding how buyers choose trusted fire safety service providers





When selecting fire safety providers:

94%

value proof of
competence
over cost

79%

rank independent auditing
and certification among the
strongest signals of trust

83%

recognise third-party
certification as demonstration
of fire assessor competence



Executive Summary

In the last ten years, fire safety awareness has changed for the better. It is now widely recognised by UK organisations as foundational – and both focus and action have increased. However, many organisations still feel unsure what they should be doing or whether they are doing it right.

Independent research conducted over recent months among decision-makers with responsibility or influence over fire safety shows a market in transition. While most say fire safety matters, it rarely makes it to the top of the priority list. Many decision-makers remain unsure about the exact scope of their legal duties, how to assess competence effectively and how to demonstrate that the right decisions have been made. One message comes across clearly: buyers are looking for reassurance.

Buyer expectations are evolving

The research points towards a growing emphasis on being able to clearly show competence, make decisions that are defensible and back everything up with independent checks.

This report sponsored by NSI and BAFE explores how buyer expectations have changed, where gaps in understanding and competency checks remain and offers both buyers and providers a clearer perspective on what this means for the future of the fire safety industry in the UK.



The post-Grenfell mindset shift

The 2017 Grenfell Tower fire claimed 72 lives and caused profound loss and suffering.

Inevitably, this tragedy has had an impact on the procurement of fire safety services. The research shows that decision-makers today take fire safety responsibility more seriously than they did a decade ago.

- ◆ **93%** of those surveyed say there is greater focus and action on fire safety
- ◆ **89%** believe fire safety is now more of a strategic business priority
- ◆ **76%** agree they prioritise fire safety more than they did five years ago

This looks like a lasting change in awareness rather than just a short-term reaction.

However, fire safety does not yet rank in the top factors in building and premises management. When asked what matters most in building maintenance and management, decision-makers placed fire safety fifth overall – after general health and safety and cost control.



This creates a challenge for both buyers and providers of fire safety services: fire safety is not overlooked but attention is distracted.

76%

agree that fire safety has become more of a priority in the last 5 years

93%

report greater focus and action around fire safety in the last 5 years



Investment and expectations of competence are rising

Alongside increased awareness comes increased spending.

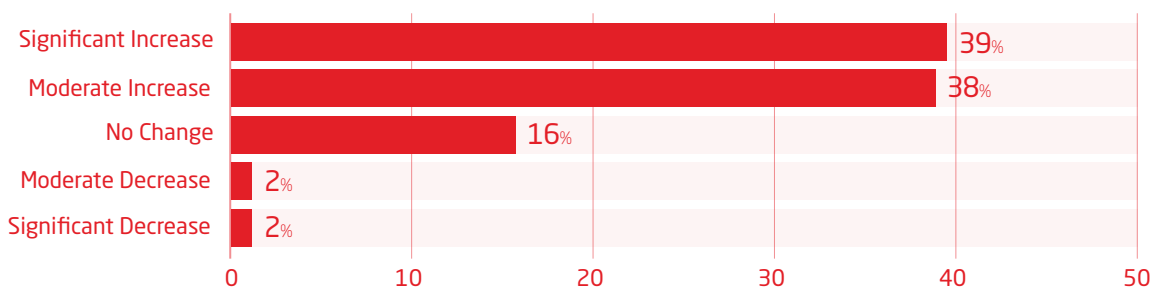
- **Almost six in ten buyers (59%)** describe their current investment in fire protection as high; 16% say very high
- **77%** expect investment in fire safety to increase over the next five years, and nearly two in five (39%) anticipate a significant increase

Investment expectations also rise with understanding.

Among those 'fully aware' of their legal fire safety responsibilities, 85% expect spending to increase – compared with 68% among those who are only 'somewhat aware'. In other words, as organisations become more informed, they invest more.

This difference matters. Increased investment brings greater scrutiny of those who are providing fire safety services. As fire safety awareness grows, buyers become less willing to take reputational or legal risks with unverified suppliers.

Future investment in fire protection over the next 5 years



77%

expect to invest more in fire safety over the next 5 years

The data indicates a market in transition: scrutiny and investment are increasing, and as they do, expectations around competence, accountability and assurance are set to rise - for providers and buyers alike.

How organisations perceive fire safety

Organisations view the importance of fire safety in different ways.

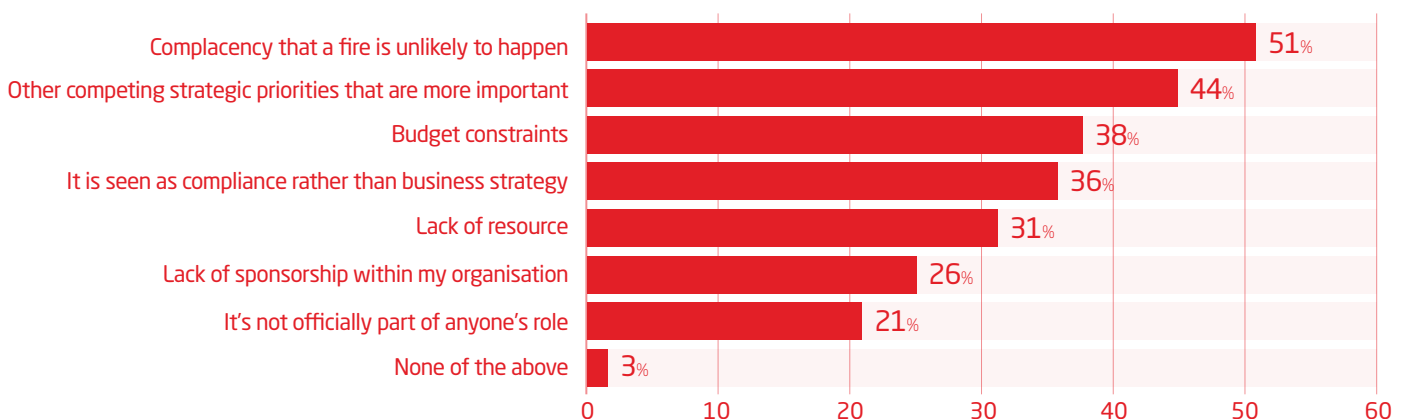
For some, it is primarily seen as a compliance requirement. Others associate it more with duty of care and risk management.

- ◆ **45%** of decision-makers see fire safety as a compliance necessity
- ◆ **34%** view it as a moral or ethical duty
- ◆ **21%** see it mainly as supporting and enabling business operations

These perspectives can and do overlap. Most organisations recognise that fire safety serves several purposes at once – from meeting legal obligations to protecting people and supporting business continuity. The emphasis placed on each can influence how fire safety is prioritised and managed in practice.

Clearly, complacency can still be an issue. More than a quarter of decision-makers (26%) believe fire safety is not taken as seriously as it should be within their organisation. Among those who hold this view, the most cited reasons are a belief that a fire is unlikely to occur (51%) and competing organisational priorities (44%).

Reasons for complacency around fire safety



For service providers, this creates both an opportunity and a threat.

It is a threat in the sense that fire safety is being approached by part of the market as a largely 'tick-box' requirement focused on meeting minimum obligations – a race to the bottom on cost and convenience.

The opportunity is that the majority of Responsible Persons are looking for greater reassurance, clearer guidance and better support in demonstrating due diligence. As a group, the research shows they are more likely to view their responsibility as a 'duty of care' rather than a 'compliance necessity'. So, by focusing on them over other senior decision makers, service providers can differentiate themselves and elevate fire safety for all at the same time. In fact, by working together, Responsible Persons and forward-thinking service providers alike can leverage each other to tackle complacency in the wider market.

Providers that understand this difference are better placed to respond to evolving client expectations.

How fire safety responsibility is experienced in practice

While organisations may view fire safety through different lenses, those with direct responsibility for fire safety decisions often experience the issue more personally.

Individuals who identify as the Responsible Person are more likely than others to view fire safety primarily as a moral or ethical duty (45%) rather than solely a compliance requirement (40%). They are also more likely to place importance on reassurance and peace of mind when selecting fire safety service providers.

This reflects the nature of the role. Those carrying legal fire safety responsibilities must not only ensure appropriate measures are in place but also be able to demonstrate that decisions are sound and defensible if challenged.

However, the research also highlights uneven confidence in understanding the role and its boundaries.

- **33%** of decision-makers express some level of doubt about the legal duties of the Responsible Person
- **38%** changed their answer about who the Responsible Person was once legal definitions were explained
- **66%** selected responsibilities that do not formally sit within the role of the Responsible Person
- Among those who identify themselves in the role, 15% are not fully confident in their responsibilities.

If you would like to better understand legal responsibilities around fire safety, resources available to you include:

England & Wales
Fire safety: Guidance for those with legal duties
www.gov.uk

Scotland
Fire Safety Guidance
www.gov.scot

Northern Ireland
Fire Safety Law: Are you aware of your responsibilities
www.nifrs.org

66%

incorrectly selected one or more of their responsibilities

38%

changed their mind on whether they were a Responsible Person once the legal definitions were explained to them

From delivery to support: the opportunity for fire safety service providers

This confusion with the responsible person role around boundaries and accountability has practical implications for fire safety providers.

While technical delivery remains essential, many Responsible Persons are seeking greater clarity, reassurance and support in meeting their responsibilities.

The research shows the market is paying much closer attention to competence and proper checks when it comes to service providers, even if this is not yet being applied consistently. Expectations are rising and fire safety decisions are more likely to be questioned and reviewed.

This does not mean organisations expect providers to assume legal responsibility.

For some organisations, fire safety may still be approached as a largely transactional service focused on completing required tasks. For others, the expectation is broader: they are looking for providers who can help them understand what good looks like, provide confidence in the work being carried out and support more robust decision-making.

As the market continues to evolve, providers who combine technical delivery with the ability to help clients understand their responsibilities, explain risk clearly and demonstrate how competence is assured are better placed to build trust and long-term relationships.

What this means for Service Providers

Providers who combine technical delivery with the ability to help clients understand their responsibilities, explain risk clearly and demonstrate how competence is assured are better placed to build trust and long-term relationships.

What this means for Responsible Persons

Awareness of fire safety responsibilities is increasing but the research shows that many organisations still face uncertainty around roles, competence checks and evidence of due diligence.

As expectations continue to rise, Responsible Persons and duty holders are likely to face more direct questions:

- How do you know your fire safety provider is competent?
- How would you evidence that decision if challenged?
- What assurance do you have if something goes wrong?

These questions are increasingly shaping how buyers evaluate fire safety providers.

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Competence over cost

Many fire safety service providers assume that buyers are driven primarily by price. The research challenges this assumption.

When decision-makers were asked what matters most when selecting a fire safety provider, proof of competence ranked as the single most important factor, with 69% saying it was essential. This placed it ahead of all other criteria, including cost, reviews and industry-recognised certifications.

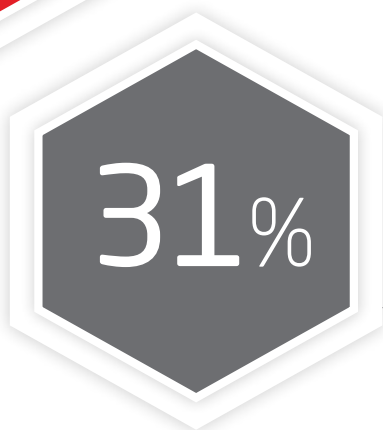
These findings also show that buyers are not looking for the lowest-cost provider. They are looking for a partner that gives them the greatest confidence.

This reflects the pressures many Responsible Persons feel. As accountability continues to sharpen, buyers are placing greater emphasis on being able to explain and defend their choice of provider - not just the price paid.





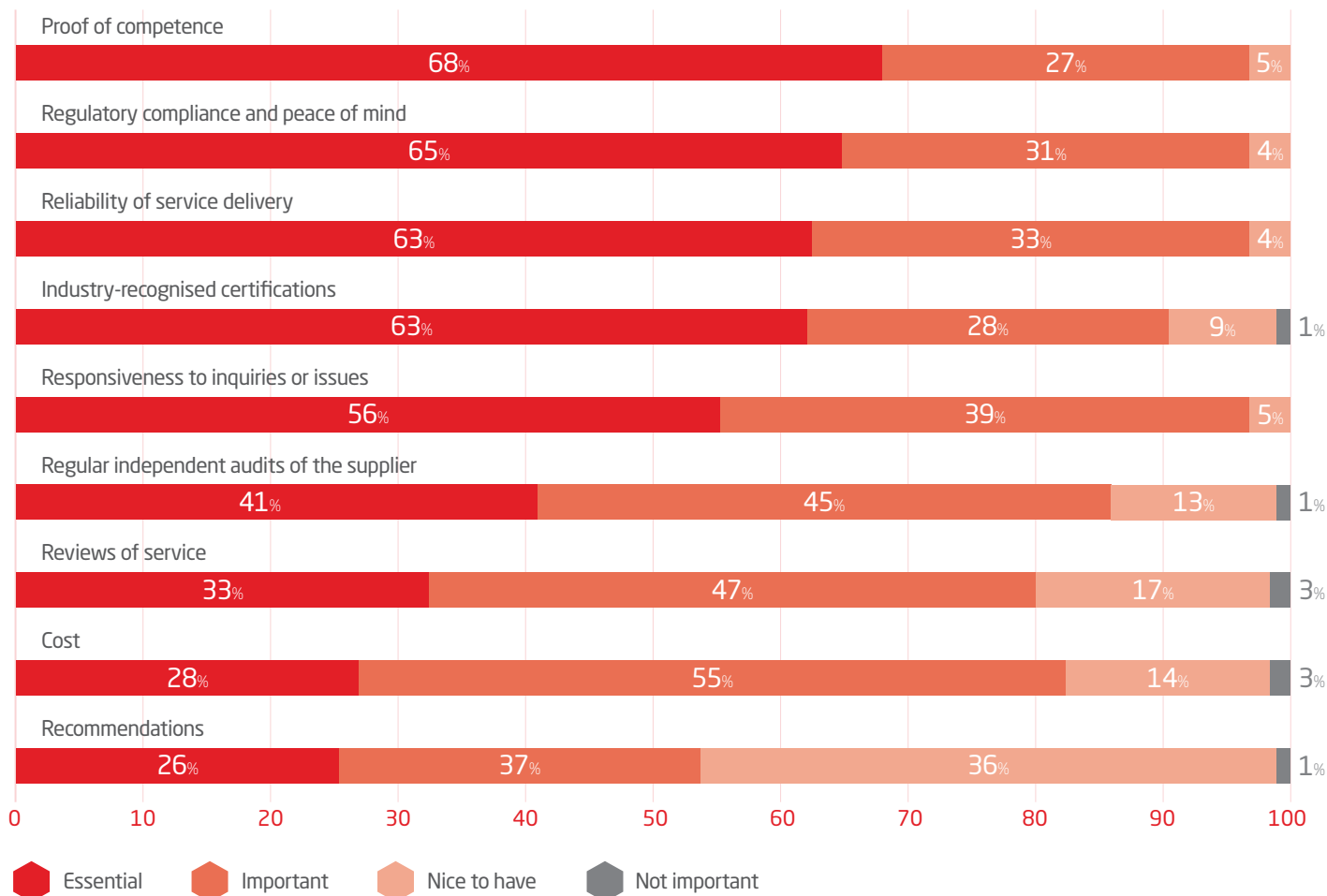
of organisations ranked proof of competence as more important than cost



less than a third place pricing among their top three considerations



What is important when selecting a fire safety service provider

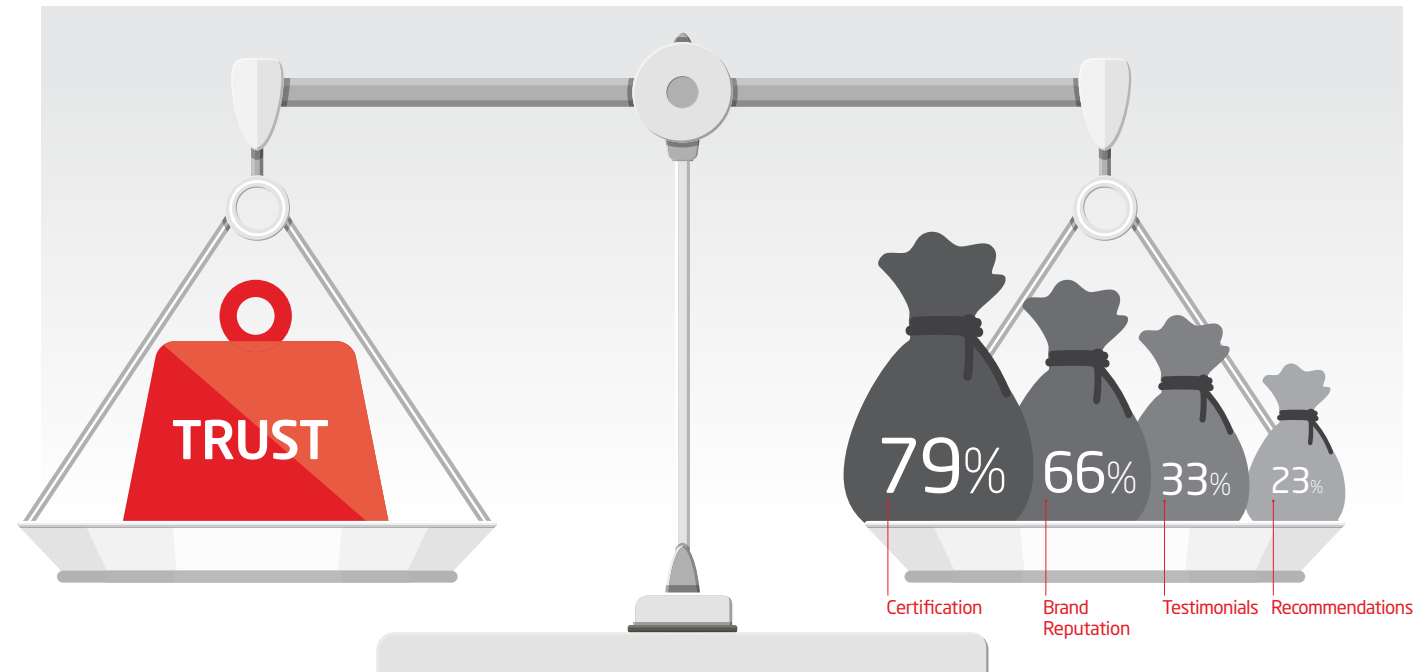


How much weight do buyers put on the following factors while choosing a service provider

Trust is still one of the biggest factors when choosing a provider but what people base that trust on is starting to change.

One useful way to look at it is through The Trust Equation, created by David Maister, Charles H. Green and Robert M. Galford in 2000.

$$\text{Trust} = \frac{\text{Credibility} + \text{Reliability} + \text{Intimacy}}{\text{Self Interest}}$$



Third-Party Certification is the biggest factor when a buyer is building trust with a provider of a fire safety service, e.g. a risk assessor.

What buyers really mean by “trust”

In simple terms, the more credible, dependable and connected a provider feels – and the less they seem driven by their own interests – the more they are trusted.

The findings of this report show credibility now carries the most weight, with 79% of buyers favouring certification and independent auditing and 66% selecting on the basis of brand reputation. Reliability and personal reassurance (intimacy) still count, just a bit less. About 33% value testimonials and 23% look to recommendations from peers.

It is also worth noting that independent certification, especially from a United Kingdom Accreditation Service (UKAS) accredited body, helps reduce concerns about self-interest. Providers who are self-certifying compliance may be seen as less trustworthy than those checked by an independent third party.

This distinction matters. In a market where legal duties are becoming clearer and scrutiny is increasing, trust is less about ‘who you know’ and more about who can demonstrate competence in a way that stands up to review. Service providers who rely solely on relationships, informal references or assumed credibility may find that these signals carry less weight over time than independent proof.

As expectations continue to evolve, the definition of a ‘trusted provider’ is moving from one who is believed to be competent to one who can clearly show it.

Buyers believe in certification

If competence is the most important factor in provider selection, how do buyers expect it to be demonstrated?

For most organisations, the answer is clear. 83% of respondents agree that third-party certification is the standard route to demonstrating fire assessor competence, and 81% say certified providers are worth any additional cost.

When asked about the benefits of choosing a certified provider, the top three benefits are:



These are not abstract benefits. They directly reflect the concerns facing many Responsible Persons, including:

- Personal accountability
- Legal exposure
- Reputational risk
- The need to demonstrate that decisions are sound and defensible

Indeed, for those designated as Responsible Persons, 55% rate peace of mind as a key benefit. For many buyers, certification is not about price or branding. It is about reassurance.

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agree that third-party certification is the standard route to demonstrating fire assessor competence



say certified providers are worth paying extra for

Checking is not always consistent

Despite this strong belief in certification, the research reveals an important gap between intention and practice.

84%

of respondents say they use a certified provider, but a closer look at the data shows that 73% either:

- Do not know who certifies their supplier,
- Are unsure whether their supplier is certified, or
- Use a supplier that is not independently certified

The result is a market where buyers value certification but do not always verify it, and where competence may be assumed rather than properly checked.

Open-text responses suggest that some organisations currently assess competence through:

- Online reviews
- Informal trust-building
- Gradual increases in responsibility, or
- Internal checks carried out by non-specialists

For service providers, this gap creates both a risk and an opportunity.

The risk is that competent, professionally certified providers may be assessed alongside unverified competitors, sometimes on the basis of familiarity or informal signals such as an online review.

The opportunity is that, as scrutiny continues to increase, buyers are likely to look for clearer and more defensible ways to demonstrate due diligence. Providers able to demonstrate independently verified competence are therefore well positioned to meet this growing expectation.

This is where UKAS-accredited third-party certification is moving beyond a point of differentiation and towards becoming an expected baseline in parts of the market.

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Reassurance matters

Across the research, one message comes through clearly: buyers are looking for reassurance.

They want confidence that their fire safety provider is competent, that risks are being managed appropriately and that they can evidence their decisions if challenged.

Independent third-party certification is designed to tackle these concerns.

When decision-makers were asked what choosing a certified provider would achieve, the responses were consistent:



97%

agree that
certified
providers bring
clear benefits

69%

say they give
confidence that
risk to life is
minimised

70%

say they provide
a trusted
solution for fire
safety needs

68%

say they provide
an evidence trail
of due diligence

These outcomes closely reflect the pressures facing many Responsible Persons. They are accountable for fire safety decisions, often without complete clarity on every technical or legal detail. In this context, robust third-party certification is a clear, independently checked way to provide reassurance.

What buyers say third-party certification provides:

For service providers, certification is a strategic choice. Certification is not only about meeting requirements. It is about aligning the business with what buyers increasingly expect towards demonstrable competence, documented assurance and decisions that can stand up to scrutiny.

Independent checking of competence

An objective, independently audited assessment that the provider meets recognised technical and operational standards.

A clear due diligence trail

Evidence to support the Responsible Person in demonstrating that a competent, independently audited provider was selected.

Greater confidence for clients and occupants

Increased confidence that fire safety measures are being delivered in line with recognised standards.

Professional credibility for the provider

A recognised, independent signal that helps distinguish professionally certified providers from unverified competitors.



Key Takeaway:

An Opportunity for Industry Leadership

The research shows the market is changing.

Expectations are rising faster than confidence

Awareness of fire safety has increased significantly in recent years and investment is expected to rise in the years ahead. At the same time, many organisations remain uncertain about their responsibilities, how to assess competence and how to evidence their due diligence.

This creates a gap between expectation and confidence - and a clear opportunity for service providers.

Buyers value reassurance

Buyers are placing increasing emphasis on proof of competence over cost. They value certification, reputation and independent assurance, and many are looking for providers who can help them navigate their legal duties with confidence.

Those carrying direct responsibility for fire safety often feel this pressure most acutely. They tend to place greater emphasis on reassurance, professional credibility and decisions that can be clearly evidenced if required.

Independently verified certification supports fire safety assurance

Success is no longer defined by price alone. It increasingly depends on trust, evidence and the ability to demonstrate competence in a way that stands up to scrutiny.

Providers who support clients in understanding their responsibilities, explain risk clearly and can evidence independently verified third-party certification are better positioned to help meet the fire safety market's growing expectation for robust, demonstrable assurance.

Conclusion

Fire safety expectations are rising, even if operational priorities have not yet fully caught up. Investment is increasing, scrutiny is gradually sharpening and those responsible for fire safety are under growing pressure to justify their decisions.

In today's market, it is no longer enough to say you are competent. You need to show it, prove it and have it verified independently.

The research shows that buyers already recognise this shift. They place strong weight on proof of competence, view third-party certification as an important route to assurance and associate certified providers with greater confidence and due diligence. Yet checks are not always applied consistently.

For Responsible Persons,

this means placing greater emphasis on how fire safety provider competence is assessed and evidenced. It is becoming an increasingly important part of responsible and defensible fire safety management to be able to demonstrate:

- Why a provider was selected, and
- How their capability has been independently verified

For fire safety service providers,

the direction of travel is equally clear:

- Wait for regulation or market pressure to force change, or
- Act now to strengthen credibility, trust and independently-verified competence

UKAS - accredited third-party certification provides a recognised and structured way to demonstrate competence and support more robust decision-making.

For providers seeking to lead the market, independently verified competence is fast becoming a defining feature of professional fire safety services.



About this Research

Fire safety legislation across the UK places clear duties on those responsible for premises. In recent years, competence, accountability and assurance have become central themes in both regulatory reform and industry discussion.

With this in mind, NSI and BAFE jointly commissioned independent research to better understand in practice:

- **How fire safety is understood and prioritised within organisations**
- **How supplier decisions are made**
- **How competence is assessed and verified in practice**
- **Where gaps exist between awareness and assurance**

The findings in this report are based on independent research conducted by Sapio Research, who surveyed UK decision-makers with responsibility for, or influence over, fire safety procurement across a range of organisations, company sizes and building types in England, Scotland, Wales and Northern Ireland.

Key Definitions

Responsible Person / Duty Holder / Appropriate person

Different parts of the UK use different terms for the person responsible for fire safety. England and Wales use "Responsible Person", Scotland uses "Duty Holder" and Northern Ireland uses "Appropriate Person", reflecting differences in national legislation.

These terms are not exactly interchangeable. Definitions and responsibilities do differ based on the relevant legislation. For the sake of simplicity, while acknowledging the differing terminology used across UK jurisdictions, the term "Responsible Person" is used throughout this report as a collective reference to persons legally responsible for fire safety.

In a workplace, the Responsible Person is generally the employer of those who work in the premises. In premises that are not workplaces, the person with control of the premises is typically the Responsible Person. If no one has control of the premises, the Responsible Person is almost always the owner of the premises.

In addition, fire safety legislation also tends to impose duties on any other persons who have control of the premises. This can include contractors involved in the maintenance of fire protection measures as well as fire risk assessors.

Buyer / Decision-Maker

The terms "buyer" and "decision-maker" are used to describe individuals within relevant organisations involved in selecting or approving providers of fire safety services, such as life safety fire risk assessors. This may include the Responsible Person but is not limited to that role.

Third-Party Certification

In this report, third-party certification refers specifically to independent, UKAS-accredited certification of fire safety service providers or fire risk assessors against recognised schemes and scopes. One example is BS 8674:2025 (Built environment – Framework for competence of individual fire risk assessors – Code of practice), the British Standard published in August 2025 that defines the competence, skills and knowledge required for fire risk assessors in the UK.

It does not refer to trade association membership, directories or unaccredited listing services.



bafe.org.uk

For over 40 years, BAFE has set the benchmark for fire safety competence in the UK. BAFE's independently verified, third-party certification schemes are all delivered exclusively through UKAS*-accredited and licensed certification bodies such as NSI.

All BAFE schemes are accredited by UKAS and before they are approved, they undergo rigorous planning and drafting stages where experts from across the fire safety sector are appointed as technical authors or consulted as part of the drafting process. Transparency and co-production are vital to success and ensures that schemes reflect the needs of both stakeholders and end users before implementation and then throughout the scheme's life cycle.

Becoming BAFE registered allows organisations to demonstrate that they meet the highest standards of professionalism, quality and compliance. This gives them a powerful competitive advantage in a sector where matters such as compliance, competence and assurance are considered vital.



nsi.org.uk

NSI (National Security Inspectorate) is an independent, UKAS-accredited and BAFE-licensed certification body specialising in the certification of providers across the fire safety and security sectors. It is also the most recognised certification body working in the fire safety industry - a claim that is supported by the independent research carried out for this report.

For more than 55 years, NSI has assessed companies against recognised technical and management standards through regular auditing and inspection. Its certification schemes are designed to verify competence, professionalism and compliance, helping organisations make informed and defensible supplier choices.

By providing independent certification and ongoing oversight, NSI supports service providers in demonstrating quality and helps buyers select trusted, competent partners.



sapioresearch.com

Sapio Research is an independent market research agency that specialises in evidence-based insight for organisations operating in complex or regulated sectors. It works with trade bodies, professional services firms and public interest organisations to gather reliable data that supports informed decision-making.

For this report, Sapio Research conducted an independent survey of UK decision-makers with responsibility for, or influence over, fire safety procurement, providing the data and analysis that underpin the findings presented.

* UKAS is the United Kingdom Accreditation Service and is the sole National Accreditation Body for the UK. UKAS are responsible for assessing and accrediting organisations that provide certification, testing and inspection services.