RICS / Sodexo Global Facilities Management Survey

1. For the purposes of this survey, by facilities management, we mean the multi-disciplinary services within the built environment and the management of their impact upon people and the workplace. This can range from providing hard services such as maintenance, to soft services such as cleaning, to the management of work space and people. With this definition in mind, what is your current geographical strategy for grouping facilities management services? 1
Base: All respondents

2. How much of an impact, if any, do you think each of the following activities will have on your organisation in the next two years? Please rate on a scale from 1 to 5, where 1 means no impact and 5 means a great deal of impact. Summary table 2
Base: All respondents

2. How much of an impact, if any, do you think each of the following activities will have on your organisation in the next two years? Please rate on a scale from 1 to 5, where 1 means no impact and 5 means a great deal of impact. Summary table - net high impact 3
Base: All respondents

2. How much of an impact, if any, do you think each of the following activities will have on your organisation in the next two years? Please rate on a scale from 1 to 5, where 1 means no impact and 5 means a great deal of impact. Improving the workplace environment and employee well-being 4
Base: All respondents

2. How much of an impact, if any, do you think each of the following activities will have on your organisation in the next two years? Please rate on a scale from 1 to 5, where 1 means no impact and 5 means a great deal of impact. Optimising building utilisation and portfolio management 5
Base: All respondents

2. How much of an impact, if any, do you think each of the following activities will have on your organisation in the next two years? Please rate on a scale from 1 to 5, where 1 means no impact and 5 means a great deal of impact. Optimising physical assets and capital expenditure (excluding buildings) 6
Base: All respondents

2. How much of an impact, if any, do you think each of the following activities will have on your organisation in the next two years? Please rate on a scale from 1 to 5, where 1 means no impact and 5 means a great deal of impact. Reducing in- or outsourcing service costs 7
Base: All respondents

2. How much of an impact, if any, do you think each of the following activities will have on your organisation in the next two years? Please rate on a scale from 1 to 5, where 1 means no impact and 5 means a great deal of impact. Energy management 8
Base: All respondents

3. Improving the workplace environment can have a positive effect on productivity, but also on other factors. In which of the following areas, if any, do you think improving the workplace environment and services has the greatest positive impact on employees or building occupants? 9
Base: All respondents

4. I would now like to talk a little bit about outsourcing, and how this relates to facilities management. What is your current strategy for outsourcing? And what is your planned strategy for outsourcing in the future? Summary table 10
Base: All respondents

4. I would now like to talk a little bit about outsourcing, and how this relates to facilities management. What is your current strategy for outsourcing? And what is your planned strategy for outsourcing in the future? Current 11
Base: All respondents

4. I would now like to talk a little bit about outsourcing, and how this relates to facilities management. What is your current strategy for outsourcing? And what is your planned strategy for outsourcing in the future? Future 13
Base: All respondents

5. Which of the following services, if any, do you currently outsource? And which of these services are you considering outsourcing in the next two years? Summary table 15
Base: All who currently outsource services / plan to outsource services in the future

5. Which of the following services, if any, do you currently outsource? And which of these services are you considering outsourcing in the next two years? Current 17
Base: All who currently outsource services

5. Which of the following services, if any, do you currently outsource? And which of these services are you considering outsourcing in the next two years? Future 19
Base: All who plan to outsource services in the future

5. Which of the following services, if any, do you currently outsource? And which of these services are you considering outsourcing in the next two years? Future 21
Base: All who do not currently use the service

6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money? Summary table 23
Base: All who currently outsource each service

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Fieldwork: 17th September - 28th November 2014

6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money? Summary table - good value 25
Base: All who currently outsource that service

6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money? Food and consumer services 27
Base: All who currently outsource food and consumer services

6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money? Technical services / maintenance 28
Base: All who currently outsource technical services / maintenance

6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money? Asset management 29
Base: All who currently outsource asset management

6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money? Energy management 30
Base: All who currently outsource energy management

6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money? Project management 31
Base: All who currently outsource project management

6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money? Workplace design / space management 32
Base: All who currently outsource workplace design / space management

6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money? Security 33
Base: All who currently outsource security

6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money? Cleaning 34
Base: All who currently outsource cleaning

6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money? Waste management 35
Base: All who currently outsource waste management

6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money? Real estate - lease administration (e.g. managing or restructuring leases) 36
Base: All who currently outsource real estate - lease administration (e.g. managing or restructuring leases)

6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money? Real estate - portfolio strategy (e.g. optimising the use and numbers of buildings) 37
Base: All who currently outsource real estate - portfolio strategy (e.g. optimising the use and numbers of buildings)

6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money? Real estate - transactions (e.g. buying and selling real estate) 38
Base: All who currently outsource real estate - transactions (e.g. buying and selling real estate)

6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money? Business process outsourcing (e.g. payroll, HR, finance) 39
Base: All who currently outsource business process outsourcing (e.g. payroll, HR, finance)

6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money? Other services 40
Base: All who currently outsource other services

7. Which of the following services, if any, do you currently incorporate into integrated or bundled outsourcing? And which would you consider incorporating into integrated or bundled outsourcing in the next two years? Summary table 41
Base: All who currently make use of integrated or bundled outsourcing and outsource at least one service or plan to outsource in the future

7. Which of the following services, if any, do you currently incorporate into integrated or bundled outsourcing? And which would you consider incorporating into integrated or bundled outsourcing in the next two years? Current 43
Base: All who currently make use of integrated or bundled outsourcing and outsource at least one service

7. Which of the following services, if any, do you currently incorporate into integrated or bundled outsourcing? And which would you consider incorporating into integrated or bundled outsourcing in the next two years? Future 45
Base: All who plan to outsource services in the future

7. Which of the following services, if any, do you currently incorporate into integrated or bundled outsourcing? And which would you consider incorporating into integrated or bundled outsourcing in the next two years? Future 47
Base: All who do not currently use the service

8. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following advantages in influencing your decision? Summary table 49
Base: All respondents

8. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following advantages in influencing your decision? Summary table - net very important 50
Base: All respondents

8. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following advantages in influencing your decision? Having a single point of contact and accountability 51
Base: All respondents

8. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following advantages in influencing your decision? Consolidated KPIs (key performance indicators) and performance reporting 52
Base: All respondents

8. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following advantages in influencing your decision? The extent to which the outsourcing company conducts work itself, rather than subcontracting 53
Base: All respondents

8. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following advantages in influencing your decision? Cost efficiencies 54
Base: All respondents

8. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following advantages in influencing your decision? Transfer of risk to an outsourcing company 55
Base: All respondents

8. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following advantages in influencing your decision? Improvements to the workplace environment or employee well-being 56
Base: All respondents

8. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following advantages in influencing your decision? Integration of real estate and facilities management services 57
Base: All respondents

8. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following advantages in influencing your decision? Increased flexibility 58
Base: All respondents

9. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following disadvantages in influencing your decision? Summary table 59
Base: All respondents

9. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following disadvantages in influencing your decision? Summary table - net very important 60
Base: All respondents

9. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following disadvantages in influencing your decision? High costs 61
Base: All respondents

9. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following disadvantages in influencing your decision? Lack of standard processes 62
Base: All respondents

9. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following disadvantages in influencing your decision? Inadequate KPIs and performance reporting 63
Base: All respondents

9. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following disadvantages in influencing your decision? Lack of service capability 64
Base: All respondents

9. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following disadvantages in influencing your decision? Lack of service expertise 65
Base: All respondents

9. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following disadvantages in influencing your decision? Limited geographical presence 66
Base: All respondents

9. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following disadvantages in influencing your decision? Lack of innovation 67
Base: All respondents

9. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following disadvantages in influencing your decision? Lack of experience in your industry 68
Base: All respondents

9. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following disadvantages in influencing your decision? Poor cultural fit with your organisation 69
Base: All respondents

10. That's very nearly the end of all the questions I wanted to ask you today - thank you so much for your time so far. My final question is about property measurement. An international standard of property measurement would provide a unified standard as to

how the area of a property is measured, for example, whether lift shafts or corridors are included in the total area. To what extent do you agree or disagree that your business would benefit from this? 70
Base: All respondents

D1. How many people does your organisation employ? 71
Base: All respondents

D2. What is the approximate turnover of your organisation? 72
Base: All respondents

D3. What industry sector do you work in? 73
Base: All respondents

RICS / Sodexo Global Facilities Management Survey

1. For the purposes of this survey, by facilities management, we mean the multi-disciplinary services within the built environment and the management of their impact upon people and the workplace. This can range from providing hard services such as maintenance, to soft services such as cleaning, to the management of work space and people. With this definition in mind, what is your current geographical strategy for grouping facilities management services?

Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integrated / bundled	Non-integrated / bundled	Site-based	National	Regional	Global	Europe	Rest of world	Corporate	Industrial	Other
Total	105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Site-based	28	19	9	5	1	4	26	14	12	28	-	-	-	22	6	5	8	15
	27%	36%	17%	24%	6%	33%	26%	25%	25%	100%	-	-	-	25%	35%	16%	42%	28%
National	30	13	17	3	7	-	30	15	17	-	30	-	-	24	6	10	5	15
	29%	25%	33%	14%	41%	-	30%	26%	35%	-	100%	-	-	27%	35%	31%	26%	28%
Regional	28	16	12	9	5	5	25	16	12	-	-	28	-	24	4	7	5	16
	27%	30%	23%	43%	29%	42%	25%	28%	25%	-	-	100%	-	27%	24%	22%	26%	30%
Global	17	4	13	4	4	2	16	10	6	-	-	-	17	16	1	9	1	7
	16%	8%	25%	19%	24%	17%	16%	18%	13%	-	-	-	100%	18%	6%	28%	5%	13%
Don't know	2	1	1	-	-	1	2	2	1	-	-	-	-	2	-	1	-	1
	2%	2%	2%	-	-	8%	2%	4%	2%	-	-	-	-	2%	-	3%	-	2%

RICS / Sodexo Global Facilities Management Survey

2. How much of an impact, if any, do you think each of the following activities will have on your organisation in the next two years? Please rate on a scale from 1 to 5, where 1 means no impact and 5 means a great deal of impact.

Summary table

Base: All respondents

	Total	No impact 1	2	3	4	A great deal of impact 5	Don't know	Nets: Low impact (1 or 2)	Nets: High impact (4 or 5)	Mean score
Improving the workplace environment and employee well-being	105	2	12	26	34	30	1	14	64	3.75
	100%	2%	11%	25%	32%	29%	1%	13%	61%	
Optimising building utilisation and portfolio management	105	8	12	18	24	42	1	20	66	3.77
	100%	8%	11%	17%	23%	40%	1%	19%	63%	
Optimising physical assets and capital expenditure (excluding buildings)	105	5	17	24	34	23	2	22	57	3.51
	100%	5%	16%	23%	32%	22%	2%	21%	54%	
Reducing in- or outsourcing service costs	105	9	18	37	22	17	2	27	39	3.19
	100%	9%	17%	35%	21%	16%	2%	26%	37%	
Energy management	105	8	11	28	35	23	-	19	58	3.51
	100%	8%	10%	27%	33%	22%	-	18%	55%	

RICS / Sodexo Global Facilities Management Survey

2. How much of an impact, if any, do you think each of the following activities will have on your organisation in the next two years? Please rate on a scale from 1 to 5, where 1 means no impact and 5 means a great deal of impact.

Summary table - net high impact

Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Optimising building utilisation and portfolio management	66	31	35	16	12	8	62	37	27	14	17	19	15	55	11	24	7	35
	63%	58%	67%	76%	71%	67%	63%	65%	56%	50%	57%	68%	88%	63%	65%	75%	37%	65%
Improving the workplace environment and employee well-being	64	31	33	13	11	7	60	37	26	15	17	18	13	55	9	23	10	31
	61%	58%	63%	62%	65%	58%	61%	65%	54%	54%	57%	64%	76%	63%	53%	72%	53%	57%
Energy management	58	32	26	12	10	5	56	35	22	13	13	17	13	51	7	15	10	33
	55%	60%	50%	57%	59%	42%	57%	61%	46%	46%	43%	61%	76%	58%	41%	47%	53%	61%
Optimising physical assets and capital expenditure (excluding buildings)	57	24	33	14	12	7	54	31	25	13	16	15	13	47	10	16	8	33
	54%	45%	63%	67%	71%	58%	55%	54%	52%	46%	53%	54%	76%	53%	59%	50%	42%	61%
Reducing in- or outsourcing service costs	39	23	16	7	5	7	36	20	17	11	13	10	5	34	5	10	12	17
	37%	43%	31%	33%	29%	58%	36%	35%	35%	39%	43%	36%	29%	39%	29%	31%	63%	31%

RICS / Sodexo Global Facilities Management Survey

2. How much of an impact, if any, do you think each of the following activities will have on your organisation in the next two years? Please rate on a scale from 1 to 5, where 1 means no impact and 5 means a great deal of impact.

Improving the workplace environment and employee well-being

Base: All respondents

			Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
		Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total		105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No impact	(1.0)	2	-	2	-	-	-	2	1	2	1	-	1	-	2	-	-	1	1
		2%	-	4%	-	-	-	2%	2%	4%	4%	-	4%	-	2%	-	-	5%	2%
	(2.0)	12	6	6	1	2	2	11	6	5	5	3	3	1	10	2	1	3	8
		11%	11%	12%	5%	12%	17%	11%	11%	10%	18%	10%	11%	6%	11%	12%	3%	16%	15%
	(3.0)	26	15	11	7	3	3	25	13	14	7	9	6	3	20	6	8	5	13
		25%	28%	21%	33%	18%	25%	25%	23%	29%	25%	30%	21%	18%	23%	35%	25%	26%	24%
	(4.0)	34	19	15	6	7	3	31	19	13	9	9	10	6	28	6	10	7	17
		32%	36%	29%	29%	41%	25%	31%	33%	27%	32%	30%	36%	35%	32%	35%	31%	37%	31%
A great deal of impact	(5.0)	30	12	18	7	4	4	29	18	13	6	8	8	7	27	3	13	3	14
		29%	23%	35%	33%	24%	33%	29%	32%	27%	21%	27%	29%	41%	31%	18%	41%	16%	26%
Don't know		1	1	-	-	1	-	1	-	1	-	1	-	-	1	-	-	-	1
		1%	2%	-	-	6%	-	1%	-	2%	-	3%	-	-	1%	-	-	-	2%
Nets																			
Low impact (1 or 2)		14	6	8	1	2	2	13	7	7	6	3	4	1	12	2	1	4	9
		13%	11%	15%	5%	12%	17%	13%	12%	15%	21%	10%	14%	6%	14%	12%	3%	21%	17%
High impact (4 or 5)		64	31	33	13	11	7	60	37	26	15	17	18	13	55	9	23	10	31
		61%	58%	63%	62%	65%	58%	61%	65%	54%	54%	57%	64%	76%	63%	53%	72%	53%	57%
Mean Score		3.75	3.71	3.79	3.90	3.81	3.75	3.76	3.82	3.64	3.50	3.76	3.75	4.12	3.78	3.59	4.09	3.42	3.66

RICS / Sodexo Global Facilities Management Survey

2. How much of an impact, if any, do you think each of the following activities will have on your organisation in the next two years? Please rate on a scale from 1 to 5, where 1 means no impact and 5 means a great deal of impact.

Optimising building utilisation and portfolio management

Base: All respondents

			Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
		Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integrated / bundled	Non-integrated / bundled	Site-based	National	Regional	Global	Europe	Rest of world	Corporate	Industrial	Other
Total		105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No impact	(1.0)	8	4	4	1	-	1	7	3	5	4	2	2	-	7	1	2	2	4
		8%	8%	8%	5%	-	8%	7%	5%	10%	14%	7%	7%	-	8%	6%	6%	11%	7%
	(2.0)	12	8	4	3	-	1	11	8	3	5	2	5	-	8	4	2	4	6
		11%	15%	8%	14%	-	8%	11%	14%	6%	18%	7%	18%	-	9%	24%	6%	21%	11%
	(3.0)	18	9	9	1	4	2	18	9	12	5	8	2	2	17	1	4	6	8
		17%	17%	17%	5%	24%	17%	18%	16%	25%	18%	27%	7%	12%	19%	6%	13%	32%	15%
	(4.0)	24	14	10	5	4	4	22	12	10	8	6	6	3	20	4	6	3	15
		23%	26%	19%	24%	24%	33%	22%	21%	21%	29%	20%	21%	18%	23%	24%	19%	16%	28%
A great deal of impact	(5.0)	42	17	25	11	8	4	40	25	17	6	11	13	12	35	7	18	4	20
		40%	32%	48%	52%	47%	33%	40%	44%	35%	21%	37%	46%	71%	40%	41%	56%	21%	37%
Don't know		1	1	-	-	1	-	1	-	1	-	1	-	-	1	-	-	-	1
		1%	2%	-	-	6%	-	1%	-	2%	-	3%	-	-	1%	-	-	-	2%
Nets																			
Low impact (1 or 2)		20	12	8	4	-	2	18	11	8	9	4	7	-	15	5	4	6	10
		19%	23%	15%	19%	-	17%	18%	19%	17%	32%	13%	25%	-	17%	29%	13%	32%	19%
High impact (4 or 5)		66	31	35	16	12	8	62	37	27	14	17	19	15	55	11	24	7	35
		63%	58%	67%	76%	71%	67%	63%	65%	56%	50%	57%	68%	88%	63%	65%	75%	37%	65%
Mean Score		3.77	3.62	3.92	4.05	4.25	3.75	3.79	3.84	3.66	3.25	3.76	3.82	4.59	3.78	3.71	4.13	3.16	3.77

RICS / Sodexo Global Facilities Management Survey

2. How much of an impact, if any, do you think each of the following activities will have on your organisation in the next two years? Please rate on a scale from 1 to 5, where 1 means no impact and 5 means a great deal of impact.

Optimising physical assets and capital expenditure (excluding buildings)

Base: All respondents

			Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
		Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total		105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No impact	(1.0)	5	4	1	2	-	-	5	2	3	4	-	1	-	4	1	1	2	2
		5%	8%	2%	10%	-	-	5%	4%	6%	14%	-	4%	-	5%	6%	3%	11%	4%
	(2.0)	17	8	9	2	3	1	17	10	9	6	4	5	2	14	3	6	5	6
		16%	15%	17%	10%	18%	8%	17%	18%	19%	21%	13%	18%	12%	16%	18%	19%	26%	11%
	(3.0)	24	17	7	3	2	4	21	12	10	5	9	6	2	21	3	8	4	12
		23%	32%	13%	14%	12%	33%	21%	21%	21%	18%	30%	21%	12%	24%	18%	25%	21%	22%
	(4.0)	34	13	21	5	8	5	31	20	13	10	9	7	8	28	6	8	7	19
		32%	25%	40%	24%	47%	42%	31%	35%	27%	36%	30%	25%	47%	32%	35%	25%	37%	35%
A great deal of impact	(5.0)	23	11	12	9	4	2	23	11	12	3	7	8	5	19	4	8	1	14
		22%	21%	23%	43%	24%	17%	23%	19%	25%	11%	23%	29%	29%	22%	24%	25%	5%	26%
Don't know		2	-	2	-	-	-	2	2	1	-	1	1	-	2	-	1	-	1
		2%	-	4%	-	-	-	2%	4%	2%	-	3%	4%	-	2%	-	3%	-	2%
Nets																			
Low impact (1 or 2)		22	12	10	4	3	1	22	12	12	10	4	6	2	18	4	7	7	8
		21%	23%	19%	19%	18%	8%	22%	21%	25%	36%	13%	21%	12%	20%	24%	22%	37%	15%
High impact (4 or 5)		57	24	33	14	12	7	54	31	25	13	16	15	13	47	10	16	8	33
		54%	45%	63%	67%	71%	58%	55%	54%	52%	46%	53%	54%	76%	53%	59%	50%	42%	61%
Mean Score		3.51	3.36	3.68	3.81	3.76	3.67	3.52	3.51	3.47	3.07	3.66	3.59	3.94	3.51	3.53	3.52	3.00	3.70

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2. How much of an impact, if any, do you think each of the following activities will have on your organisation in the next two years? Please rate on a scale from 1 to 5, where 1 means no impact and 5 means a great deal of impact.

Reducing in- or outsourcing service costs

Base: All respondents

			Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
		Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integrated / bundled	Non-integrated / bundled	Site-based	National	Regional	Global	Europe	Rest of world	Corporate	Industrial	Other
Total		105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
		100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
No impact	(1.0)	9	3	6	4	-	-	9	3	6	5	1	1	2	7	2	5	2	2
		9%	6%	12%	19%	-	-	9%	5%	13%	18%	3%	4%	12%	8%	12%	16%	11%	4%
	(2.0)	18	8	10	1	4	4	16	10	8	4	6	4	2	14	4	5	4	9
		17%	15%	19%	5%	24%	33%	16%	18%	17%	14%	20%	14%	12%	16%	24%	16%	21%	17%
	(3.0)	37	18	19	9	7	1	36	23	16	8	8	13	8	31	6	12	1	24
		35%	34%	37%	43%	41%	8%	36%	40%	33%	29%	27%	46%	47%	35%	35%	38%	5%	44%
	(4.0)	22	13	9	3	3	4	20	10	11	2	11	5	4	20	2	6	7	9
		21%	25%	17%	14%	18%	33%	20%	18%	23%	7%	37%	18%	24%	23%	12%	19%	37%	17%
A great deal of impact	(5.0)	17	10	7	4	2	3	16	10	6	9	2	5	1	14	3	4	5	8
		16%	19%	13%	19%	12%	25%	16%	18%	13%	32%	7%	18%	6%	16%	18%	13%	26%	15%
Don't know		2	1	1	-	1	-	2	1	1	-	2	-	-	2	-	-	-	2
		2%	2%	2%	-	6%	-	2%	2%	2%	-	7%	-	-	2%	-	-	-	4%
Nets																			
Low impact (1 or 2)		27	11	16	5	4	4	25	13	14	9	7	5	4	21	6	10	6	11
		26%	21%	31%	24%	24%	33%	25%	23%	29%	32%	23%	18%	24%	24%	35%	31%	32%	20%
High impact (4 or 5)		39	23	16	7	5	7	36	20	17	11	13	10	5	34	5	10	12	17
		37%	43%	31%	33%	29%	58%	36%	35%	35%	39%	43%	36%	29%	39%	29%	31%	63%	31%
Mean Score		3.19	3.37	3.02	3.10	3.19	3.50	3.19	3.25	3.06	3.21	3.25	3.32	3.00	3.23	3.00	2.97	3.47	3.23

RICS / Sodexo Global Facilities Management Survey

2. How much of an impact, if any, do you think each of the following activities will have on your organisation in the next two years? Please rate on a scale from 1 to 5, where 1 means no impact and 5 means a great deal of impact.

Energy management

Base: All respondents

			Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
		Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integrated / bundled	Non-integrated / bundled	Site-based	National	Regional	Global	Europe	Rest of world	Corporate	Industrial	Other
Total		105 100%	53 100%	52 100%	21 100%	17 100%	12 100%	99 100%	57 100%	48 100%	28 100%	30 100%	28 100%	17 100%	88 100%	17 100%	32 100%	19 100%	54 100%
No impact	(1.0)	8 8%	4 8%	4 8%	3 14%	1 6%	- -	8 8%	2 4%	7 15%	4 14%	2 7%	1 4%	1 6%	7 8%	1 6%	4 13%	3 16%	1 2%
	(2.0)	11 10%	6 11%	5 10%	1 5%	2 12%	4 33%	9 9%	4 7%	5 10%	2 7%	3 10%	4 14%	2 12%	8 9%	3 18%	5 16%	2 11%	4 7%
	(3.0)	28 27%	11 21%	17 33%	5 24%	4 24%	3 25%	26 26%	16 28%	14 29%	9 32%	12 40%	6 21%	1 6%	22 25%	6 35%	8 25%	4 21%	16 30%
	(4.0)	35 33%	20 38%	15 29%	7 33%	4 24%	4 33%	33 33%	18 32%	15 31%	9 32%	9 30%	10 36%	5 29%	31 35%	4 24%	8 25%	7 37%	20 37%
A great deal of impact	(5.0)	23 22%	12 23%	11 21%	5 24%	6 35%	1 8%	23 23%	17 30%	7 15%	4 14%	4 13%	7 25%	8 47%	20 23%	3 18%	7 22%	3 16%	13 24%
Don't know		- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -
Nets																			
Low impact (1 or 2)		19 18%	10 19%	9 17%	4 19%	3 18%	4 33%	17 17%	6 11%	12 25%	6 21%	5 17%	5 18%	3 18%	15 17%	4 24%	9 28%	5 26%	5 9%
High impact (4 or 5)		58 55%	32 60%	26 50%	12 57%	10 59%	5 42%	56 57%	35 61%	22 46%	13 46%	13 43%	17 61%	13 76%	51 58%	7 41%	15 47%	10 53%	33 61%
Mean Score		3.51	3.57	3.46	3.48	3.71	3.17	3.55	3.77	3.21	3.25	3.33	3.64	4.00	3.56	3.29	3.28	3.26	3.74

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3. Improving the workplace environment can have a positive effect on productivity, but also on other factors.
In which of the following areas, if any, do you think improving the workplace environment and services has the greatest positive impact on employees or building occupants?
Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Social interaction (e.g. areas to meet up and socialise, technology to gain access to social media)	32	14	18	2	8	2	30	20	11	4	14	6	8	27	5	12	5	15
	30%	26%	35%	10%	47%	17%	30%	35%	23%	14%	47%	21%	47%	31%	29%	38%	26%	28%
Ease and efficiency of carrying out day to day activities (e.g. concierge, help desk, shuttle services)	23	10	13	4	5	1	22	14	12	8	6	6	3	20	3	5	4	14
	22%	19%	25%	19%	29%	8%	22%	25%	25%	29%	20%	21%	18%	23%	18%	16%	21%	26%
Health and wellbeing (e.g. fitness facilities, healthy eating options)	23	12	11	6	2	6	21	12	11	6	4	8	3	18	5	7	4	12
	22%	23%	21%	29%	12%	50%	21%	21%	23%	21%	13%	29%	18%	20%	29%	22%	21%	22%
Physical environment (e.g. building décor and comfort)	18	10	8	5	2	2	17	7	9	7	5	5	1	16	2	5	3	10
	17%	19%	15%	24%	12%	17%	17%	12%	19%	25%	17%	18%	6%	18%	12%	16%	16%	19%
Recognition (e.g. space, facilities and technology linked to job grade / role)	8	7	1	4	-	-	8	4	4	2	1	3	2	6	2	3	2	3
	8%	13%	2%	19%	-	-	8%	7%	8%	7%	3%	11%	12%	7%	12%	9%	11%	6%
None of the above	1	-	1	-	-	1	1	-	1	1	-	-	-	1	-	-	1	-
	1%	-	2%	-	-	8%	1%	-	2%	4%	-	-	-	1%	-	-	5%	-

RICS / Sodexo Global Facilities Management Survey

4. I would now like to talk a little bit about outsourcing, and how this relates to facilities management. What is your current strategy for outsourcing? And what is your planned strategy for outsourcing in the future?

Summary table

Base: All respondents

	Current	Future
Total	105 100%	105 100%
All in-house (no outsourcing)	12 11%	6 6%
Single service outsourcing (outsourcing individual services one at a time)	39 37%	26 25%
Bundled outsourcing (outsourcing multiple individual services)	36 34%	29 28%
Integrated services (outsourcing multiple services as one integrated, end-to-end service)	24 23%	31 30%
A managing agent (a single agent that coordinates and manages the activities of all outsourced services and subcontractors)	11 10%	14 13%
None of the above	1 1%	9 9%
Nets		
Any outsourcing	99 94%	101 96%
Integrated or bundled outsourcing	57 54%	59 56%
Non-integrated or bundled outsourcing	48 46%	39 37%

RICS / Sodexo Global Facilities Management Survey

4. I would now like to talk a little bit about outsourcing, and how this relates to facilities management. What is your current strategy for outsourcing? And what is your planned strategy for outsourcing in the future?

Current

Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integrated / bundled	Non-integrated / bundled	Site-based	National	Regional	Global	Europe	Rest of world	Corporate	Industrial	Other
Total	105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
All in-house (no outsourcing)	12	8	4	2	2	12	6	2	5	4	-	5	2	12	-	1	1	10
	11%	15%	8%	10%	12%	100%	6%	4%	10%	14%	-	18%	12%	14%	-	3%	5%	19%
Single service outsourcing (outsourcing individual services one at a time)	39	21	18	10	7	4	39	5	39	9	15	10	4	32	7	12	9	18
	37%	40%	35%	48%	41%	33%	39%	9%	81%	32%	50%	36%	24%	36%	41%	38%	47%	33%
Bundled outsourcing (outsourcing multiple individual services)	36	18	18	8	7	1	36	36	4	11	5	13	6	31	5	10	6	20
	34%	34%	35%	38%	41%	8%	36%	63%	8%	39%	17%	46%	35%	35%	29%	31%	32%	37%
Integrated services (outsourcing multiple services as one integrated, end-to-end service)	24	10	14	1	3	2	24	24	5	3	10	5	5	20	4	7	4	13
	23%	19%	27%	5%	18%	17%	24%	42%	10%	11%	33%	18%	29%	23%	24%	22%	21%	24%
A managing agent (a single agent that coordinates and manages the activities of all outsourced services and subcontractors)	11	5	6	2	2	1	11	4	11	3	2	4	2	10	1	5	1	5
	10%	9%	12%	10%	12%	8%	11%	7%	23%	11%	7%	14%	12%	11%	6%	16%	5%	9%
None of the above	1	1	-	-	-	-	1	-	-	-	1	-	-	1	-	-	-	1
	1%	2%	-	-	-	-	1%	-	-	-	3%	-	-	1%	-	-	-	2%
Nets																		
Any outsourcing	99	50	49	21	16	6	99	57	48	26	30	25	16	82	17	31	19	49
	94%	94%	94%	100%	94%	50%	100%	100%	100%	93%	100%	89%	94%	93%	100%	97%	100%	91%
Integrated or bundled outsourcing	57	26	31	9	9	2	57	57	7	14	15	16	10	48	9	16	10	31
	54%	49%	60%	43%	53%	17%	58%	100%	15%	50%	50%	57%	59%	55%	53%	50%	53%	57%

RICS / Sodexo Global Facilities Management Survey

4. I would now like to talk a little bit about outsourcing, and how this relates to facilities management. What is your current strategy for outsourcing? And what is your planned strategy for outsourcing in the future?

Current

Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Non-integrated or bundled outsourcing	48	25	23	12	9	5	48	7	48	12	17	12	6	40	8	16	10	22
	46%	47%	44%	57%	53%	42%	48%	12%	100%	43%	57%	43%	35%	45%	47%	50%	53%	41%

RICS / Sodexo Global Facilities Management Survey

4. I would now like to talk a little bit about outsourcing, and how this relates to facilities management. What is your current strategy for outsourcing? And what is your planned strategy for outsourcing in the future?

Future

Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
All in-house (no outsourcing)	6	6	-	1	-	5	3	1	3	1	-	4	1	6	-	-	-	6
	6%	11%	-	5%	-	42%	3%	2%	6%	4%	-	14%	6%	7%	-	-	-	11%
Single service outsourcing (outsourcing individual services one at a time)	26	11	15	6	4	1	26	8	21	9	7	7	3	20	6	8	4	14
	25%	21%	29%	29%	24%	8%	26%	14%	44%	32%	23%	25%	18%	23%	35%	25%	21%	26%
Bundled outsourcing (outsourcing multiple individual services)	29	15	14	7	7	3	29	21	11	9	7	8	4	27	2	6	6	17
	28%	28%	27%	33%	41%	25%	29%	37%	23%	32%	23%	29%	24%	31%	12%	19%	32%	31%
Integrated services (outsourcing multiple services as one integrated, end-to-end service)	31	14	17	5	4	3	29	22	8	5	12	8	6	24	7	13	5	13
	30%	26%	33%	24%	24%	25%	29%	39%	17%	18%	40%	29%	35%	27%	41%	41%	26%	24%
A managing agent (a single agent that coordinates and manages the activities of all outsourced services and subcontractors)	14	6	8	3	1	1	14	6	10	4	2	5	3	11	3	7	1	6
	13%	11%	15%	14%	6%	8%	14%	11%	21%	14%	7%	18%	18%	13%	18%	22%	5%	11%
None of the above	9	4	5	1	2	2	8	5	5	1	5	2	-	9	-	1	3	5
	9%	8%	10%	5%	12%	17%	8%	9%	10%	4%	17%	7%	-	10%	-	3%	16%	9%
Nets																		
Any outsourcing	101	49	52	21	17	9	98	56	47	28	30	25	16	84	17	32	19	50
	96%	92%	100%	100%	100%	75%	99%	98%	98%	100%	100%	89%	94%	95%	100%	100%	100%	93%
Integrated or bundled outsourcing	59	29	30	12	11	6	57	42	18	14	19	15	10	50	9	18	11	30
	56%	55%	58%	57%	65%	50%	58%	74%	38%	50%	63%	54%	59%	57%	53%	56%	58%	56%

RICS / Sodexo Global Facilities Management Survey

4. I would now like to talk a little bit about outsourcing, and how this relates to facilities management. What is your current strategy for outsourcing? And what is your planned strategy for outsourcing in the future?

Future

Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Non-integrated or bundled outsourcing	39	17	22	9	5	2	39	13	30	13	9	11	6	30	9	14	5	20
	37%	32%	42%	43%	29%	17%	39%	23%	63%	46%	30%	39%	35%	34%	53%	44%	26%	37%

RICS / Sodexo Global Facilities Management Survey

5. Which of the following services, if any, do you currently outsource? And which of these services are you considering outsourcing in the next two years?

Summary table

Base: All who currently outsource services / plan to outsource services in the future

	Current	Future
Total	99 100%	101 100%
Food and consumer services	79 80%	51 50%
Technical services / maintenance	90 91%	58 57%
Asset management	26 26%	25 25%
Energy management	47 47%	35 35%
Project management	48 48%	31 31%
Workplace design / space management	60 61%	38 38%
Security	88 89%	57 56%
Cleaning	96 97%	60 59%
Waste management	86 87%	51 50%
Real estate - lease administration (e.g. managing or restructuring leases)	34 34%	30 30%
Real estate - portfolio strategy (e.g. optimising the use and numbers of buildings)	13 13%	14 14%
Real estate - transactions (e.g. buying and selling real estate)	44 44%	29 29%

RICS / Sodexo Global Facilities Management Survey

5. Which of the following services, if any, do you currently outsource? And which of these services are you considering outsourcing in the next two years?

Summary table

Base: All who currently outsource services / plan to outsource services in the future

	Current	Future
Total	99 100%	101 100%
Business process outsourcing (e.g. payroll, HR, finance)	34 34%	23 23%
Other services	32 32%	15 15%
None of the above	- -	25 25%
Nets		
Hard services	95 96%	63 62%
Soft services	98 99%	64 63%
Real estate services	51 52%	34 34%

RICS / Sodexo Global Facilities Management Survey

5. Which of the following services, if any, do you currently outsource? And which of these services are you considering outsourcing in the next two years?

Current

Base: All who currently outsource services

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integrated / bundled	Non-integrated / bundled	Site-based	National	Regional	Global	Europe	Rest of world	Corporate	Industrial	Other
Total	99 100%	50 100%	49 100%	21 100%	16 100%	6 100%	99 100%	57 100%	48 100%	26 100%	30 100%	25 100%	16 100%	82 100%	17 100%	31 100%	19 100%	49 100%
Cleaning	96 97%	47 94%	49 100%	19 90%	16 100%	5 83%	96 97%	57 100%	45 94%	25 96%	30 100%	23 92%	16 100%	79 96%	17 100%	31 100%	19 100%	46 94%
Technical services / maintenance	90 91%	45 90%	45 92%	18 86%	16 100%	5 83%	90 91%	55 96%	41 85%	23 88%	27 90%	23 92%	15 94%	76 93%	14 82%	29 94%	18 95%	43 88%
Security	88 89%	41 82%	47 96%	19 90%	14 88%	6 100%	88 89%	55 96%	40 83%	19 73%	29 97%	23 92%	15 94%	73 89%	15 88%	28 90%	19 100%	41 84%
Waste management	86 87%	40 80%	46 94%	16 76%	15 94%	5 83%	86 87%	54 95%	37 77%	19 73%	30 100%	21 84%	14 88%	72 88%	14 82%	28 90%	17 89%	41 84%
Food and consumer services	79 80%	32 64%	47 96%	15 71%	15 94%	3 50%	79 80%	49 86%	35 73%	16 62%	27 90%	18 72%	16 100%	64 78%	15 88%	25 81%	16 84%	38 78%
Workplace design / space management	60 61%	24 48%	36 73%	15 71%	11 69%	2 33%	60 61%	39 68%	24 50%	11 42%	22 73%	13 52%	13 81%	51 62%	9 53%	19 61%	11 58%	30 61%
Project management	48 48%	17 34%	31 63%	8 38%	11 69%	2 33%	48 48%	34 60%	18 38%	7 27%	13 43%	15 60%	13 81%	39 48%	9 53%	18 58%	8 42%	22 45%
Energy management	47 47%	18 36%	29 59%	9 43%	8 50%	2 33%	47 47%	31 54%	19 40%	11 42%	12 40%	12 48%	12 75%	41 50%	6 35%	17 55%	8 42%	22 45%
Real estate - transactions (e.g. buying and selling real estate)	44 44%	17 34%	27 55%	8 38%	12 75%	2 33%	44 44%	29 51%	18 38%	9 35%	13 43%	11 44%	11 69%	37 45%	7 41%	19 61%	7 37%	18 37%
Real estate - lease administration (e.g. managing or restructuring leases)	34 34%	12 24%	22 45%	6 29%	10 63%	1 17%	34 34%	26 46%	10 21%	10 38%	11 37%	6 24%	7 44%	30 37%	4 24%	10 32%	8 42%	16 33%
Business process outsourcing (e.g. payroll, HR, finance)	34 34%	16 32%	18 37%	7 33%	6 38%	1 17%	34 34%	21 37%	15 31%	11 42%	10 33%	6 24%	7 44%	27 33%	7 41%	12 39%	6 32%	16 33%

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5. Which of the following services, if any, do you currently outsource? And which of these services are you considering outsourcing in the next two years?

Current

Base: All who currently outsource services

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integrated / bundled	Non-integrated / bundled	Site-based	National	Regional	Global	Europe	Rest of world	Corporate	Industrial	Other
Total	99	50	49	21	16	6	99	57	48	26	30	25	16	82	17	31	19	49
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Asset management	26	8	18	4	5	-	26	20	9	6	7	5	8	24	2	12	5	9
	26%	16%	37%	19%	31%	-	26%	35%	19%	23%	23%	20%	50%	29%	12%	39%	26%	18%
Real estate - portfolio strategy (e.g. optimising the use and numbers of buildings)	13	5	8	4	2	-	13	9	5	5	2	3	3	11	2	5	4	4
	13%	10%	16%	19%	13%	-	13%	16%	10%	19%	7%	12%	19%	13%	12%	16%	21%	8%
Other services	32	15	17	7	2	1	32	19	15	6	8	10	7	29	3	16	4	12
	32%	30%	35%	33%	13%	17%	32%	33%	31%	23%	27%	40%	44%	35%	18%	52%	21%	24%
None of the above	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Nets																		
Hard services	95	46	49	19	16	5	95	57	44	25	29	24	15	78	17	30	19	46
	96%	92%	100%	90%	100%	83%	96%	100%	92%	96%	97%	96%	94%	95%	100%	97%	100%	94%
Soft services	98	49	49	20	16	6	98	57	47	26	30	24	16	81	17	31	19	48
	99%	98%	100%	95%	100%	100%	99%	100%	98%	100%	100%	96%	100%	99%	100%	100%	100%	98%
Real estate services	51	19	32	9	13	2	51	34	21	12	15	12	12	43	8	20	9	22
	52%	38%	65%	43%	81%	33%	52%	60%	44%	46%	50%	48%	75%	52%	47%	65%	47%	45%

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5. Which of the following services, if any, do you currently outsource? And which of these services are you considering outsourcing in the next two years?

Future

Base: All who plan to outsource services in the future

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	101	49	52	21	17	9	98	56	47	28	30	25	16	84	17	32	19	50
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Cleaning	60	29	31	16	17	6	57	34	26	19	17	15	9	46	14	13	13	34
	59%	59%	60%	76%	100%	67%	58%	61%	55%	68%	57%	60%	56%	55%	82%	41%	68%	68%
Technical services / maintenance	58	29	29	16	16	5	56	32	27	16	17	16	9	48	10	15	11	32
	57%	59%	56%	76%	94%	56%	57%	57%	57%	57%	57%	64%	56%	57%	59%	47%	58%	64%
Security	57	28	29	17	15	7	54	33	24	15	18	16	8	45	12	12	13	32
	56%	57%	56%	81%	88%	78%	55%	59%	51%	54%	60%	64%	50%	54%	71%	38%	68%	64%
Food and consumer services	51	24	27	13	16	4	49	30	22	14	16	13	8	38	13	12	10	29
	50%	49%	52%	62%	94%	44%	50%	54%	47%	50%	53%	52%	50%	45%	76%	38%	53%	58%
Waste management	51	22	29	13	17	6	48	31	20	12	17	15	7	40	11	11	11	29
	50%	45%	56%	62%	100%	67%	49%	55%	43%	43%	57%	60%	44%	48%	65%	34%	58%	58%
Workplace design / space management	38	18	20	10	11	2	37	24	15	8	14	8	8	30	8	10	6	22
	38%	37%	38%	48%	65%	22%	38%	43%	32%	29%	47%	32%	50%	36%	47%	31%	32%	44%
Energy management	35	17	18	9	10	3	34	25	12	8	11	11	5	27	8	6	6	23
	35%	35%	35%	43%	59%	33%	35%	45%	26%	29%	37%	44%	31%	32%	47%	19%	32%	46%
Project management	31	15	16	5	11	3	30	23	9	6	11	10	4	22	9	7	5	19
	31%	31%	31%	24%	65%	33%	31%	41%	19%	21%	37%	40%	25%	26%	53%	22%	26%	38%
Real estate - lease administration (e.g. managing or restructuring leases)	30	12	18	7	13	5	27	20	9	10	9	6	5	25	5	6	7	17
	30%	24%	35%	33%	76%	56%	28%	36%	19%	36%	30%	24%	31%	30%	29%	19%	37%	34%
Real estate - transactions (e.g. buying and selling real estate)	29	12	17	6	14	4	26	19	9	9	8	7	5	24	5	8	6	15
	29%	24%	33%	29%	82%	44%	27%	34%	19%	32%	27%	28%	31%	29%	29%	25%	32%	30%
Asset management	25	11	14	7	10	3	23	18	7	7	6	6	6	20	5	6	6	13
	25%	22%	27%	33%	59%	33%	23%	32%	15%	25%	20%	24%	38%	24%	29%	19%	32%	26%

ComRes
Fieldwork: 17th September - 28th November 2014

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5. Which of the following services, if any, do you currently outsource? And which of these services are you considering outsourcing in the next two years?

Future

Base: All who plan to outsource services in the future

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	101	49	52	21	17	9	98	56	47	28	30	25	16	84	17	32	19	50
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Business process outsourcing (e.g. payroll, HR, finance)	23	12	11	6	5	5	21	16	6	8	6	4	5	20	3	1	7	15
	23%	24%	21%	29%	29%	56%	21%	29%	13%	29%	20%	16%	31%	24%	18%	3%	37%	30%
Real estate - portfolio strategy (e.g. optimising the use and numbers of buildings)	14	8	6	4	5	3	12	10	2	7	3	3	1	11	3	3	4	7
	14%	16%	12%	19%	29%	33%	12%	18%	4%	25%	10%	12%	6%	13%	18%	9%	21%	14%
Other services	15	8	7	3	2	1	15	6	10	4	5	5	1	13	2	6	3	6
	15%	16%	13%	14%	12%	11%	15%	11%	21%	14%	17%	20%	6%	15%	12%	19%	16%	12%
None of the above	25	9	16	2	-	2	25	16	10	7	5	6	5	24	1	12	4	9
	25%	18%	31%	10%	-	22%	26%	29%	21%	25%	17%	24%	31%	29%	6%	38%	21%	18%
Nets																		
Hard services	63	31	32	16	16	5	61	36	28	18	19	16	10	50	13	18	12	33
	62%	63%	62%	76%	94%	56%	62%	64%	60%	64%	63%	64%	63%	60%	76%	56%	63%	66%
Soft services	64	33	31	18	17	7	61	35	29	20	18	17	9	50	14	14	14	36
	63%	67%	60%	86%	100%	78%	62%	63%	62%	71%	60%	68%	56%	60%	82%	44%	74%	72%
Real estate services	34	14	20	8	14	5	31	22	11	11	10	8	5	28	6	8	8	18
	34%	29%	38%	38%	82%	56%	32%	39%	23%	39%	33%	32%	31%	33%	35%	25%	42%	36%

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5. Which of the following services, if any, do you currently outsource? And which of these services are you considering outsourcing in the next two years?

Future

Base: All who do not currently use the service

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	101	49	52	21	17	9	98	56	47	28	30	25	16	84	17	32	19	50
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Real estate - transactions (e.g. buying and selling real estate)	22	9	13	6	11	1	22	17	7	6	6	6	4	18	4	6	4	12
	50%	53%	48%	75%	92%	50%	50%	59%	39%	67%	46%	55%	36%	49%	57%	32%	57%	67%
Business process outsourcing (e.g. payroll, HR, finance)	17	9	8	5	4	1	17	14	4	4	5	4	4	14	3	1	4	12
	50%	56%	44%	71%	67%	100%	50%	67%	27%	36%	50%	67%	57%	52%	43%	8%	67%	75%
Other services	13	8	5	3	2	-	13	5	8	3	4	5	1	11	2	6	2	5
	42%	57%	29%	43%	100%	-	42%	28%	57%	50%	50%	56%	14%	39%	67%	38%	50%	45%
None of the above	25	9	16	2	-	2	25	16	10	7	5	6	5	24	1	12	4	9
	25%	18%	31%	10%	-	22%	26%	29%	21%	25%	17%	24%	31%	29%	6%	38%	21%	18%

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6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money?

Summary table

Base: All who currently outsource each service

	Total	Good value for money	Average value for money	Poor value for money	Don't know
Food and consumer services	79 100%	38 48%	28 35%	9 11%	4 5%
Technical services / maintenance	90 100%	55 61%	26 29%	5 6%	4 4%
Asset management	26 100%	14 54%	7 27%	2 8%	3 12%
Energy management	47 100%	28 60%	12 26%	5 11%	2 4%
Project management	48 100%	25 52%	17 35%	3 6%	3 6%
Workplace design / space management	60 100%	37 62%	19 32%	3 5%	1 2%
Security	88 100%	51 58%	25 28%	8 9%	4 5%
Cleaning	96 100%	56 58%	27 28%	10 10%	3 3%
Waste management	86 100%	52 60%	24 28%	3 3%	7 8%
Real estate - lease administration (e.g. managing or restructuring leases)	34 100%	22 65%	9 26%	1 3%	2 6%
Real estate - portfolio strategy (e.g. optimising the use and numbers of buildings)	13 100%	10 77%	3 23%	- -	- -
Real estate - transactions (e.g. buying and selling real estate)	44 100%	28 64%	12 27%	- -	4 9%

RICS / Sodexo Global Facilities Management Survey

6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money?

Summary table

Base: All who currently outsource each service

	Total	Good value for money	Average value for money	Poor value for money	Don't know
Business process outsourcing (e.g. payroll, HR, finance)	34	20	6	2	6
	100%	59%	18%	6%	18%
Other services	32	18	8	3	3
	100%	56%	25%	9%	9%

RICS / Sodexo Global Facilities Management Survey

6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money?

Summary table - good value

Base: All who currently outsource that service

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integrated / bundled	Non-integrated / bundled	Site-based	National	Regional	Global	Europe	Rest of world	Corporate	Industrial	Other
Total	105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Food and consumer services	38	18	20	5	8	3	38	24	18	9	11	9	7	31	7	12	8	18
	48%	56%	43%	33%	53%	100%	48%	49%	51%	56%	41%	50%	44%	48%	47%	48%	50%	47%
Technical services / maintenance	55	28	27	9	10	4	55	34	27	15	16	12	10	45	10	19	8	28
	61%	62%	60%	50%	63%	80%	61%	62%	66%	65%	59%	52%	67%	59%	71%	66%	44%	65%
Asset management	14	4	10	2	3	-	14	10	6	2	3	4	5	13	1	7	2	5
	54%	50%	56%	50%	60%	-	54%	50%	67%	33%	43%	80%	63%	54%	50%	58%	40%	56%
Energy management	28	14	14	6	4	1	28	19	10	7	7	8	6	24	4	9	4	15
	60%	78%	48%	67%	50%	50%	60%	61%	53%	64%	58%	67%	50%	59%	67%	53%	50%	68%
Project management	25	10	15	2	8	1	25	19	9	4	5	8	8	22	3	6	5	14
	52%	59%	48%	25%	73%	50%	52%	56%	50%	57%	38%	53%	62%	56%	33%	33%	63%	64%
Workplace design / space management	37	14	23	7	9	1	37	26	13	6	13	8	9	32	5	11	7	19
	62%	58%	64%	47%	82%	50%	62%	67%	54%	55%	59%	62%	69%	63%	56%	58%	64%	63%
Security	51	22	29	8	8	3	51	35	21	14	14	10	11	44	7	14	11	26
	58%	54%	62%	42%	57%	50%	58%	64%	53%	74%	48%	43%	73%	60%	47%	50%	58%	63%
Cleaning	56	26	30	10	10	4	56	34	27	19	12	12	11	46	10	20	9	27
	58%	55%	61%	53%	63%	80%	58%	60%	60%	76%	40%	52%	69%	58%	59%	65%	47%	59%
Waste management	52	24	28	8	10	4	52	32	24	12	18	10	10	46	6	16	8	28
	60%	60%	61%	50%	67%	80%	60%	59%	65%	63%	60%	48%	71%	64%	43%	57%	47%	68%
Real estate - lease administration (e.g. managing or restructuring leases)	22	8	14	3	8	1	22	16	8	8	4	5	5	18	4	6	7	9
	65%	67%	64%	50%	80%	100%	65%	62%	80%	80%	36%	83%	71%	60%	100%	60%	88%	56%
Real estate - portfolio strategy (e.g. optimising the use and numbers of buildings)	10	5	5	2	2	-	10	6	5	4	1	3	2	8	2	4	3	3
	77%	100%	63%	50%	100%	-	77%	67%	100%	80%	50%	100%	67%	73%	100%	80%	75%	75%

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6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money?

Summary table - good value

Base: All who currently outsource that service

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Real estate - transactions (e.g. buying and selling real estate)	28	11	17	4	10	1	28	18	12	5	7	8	8	22	6	11	6	11
	64%	65%	63%	50%	83%	50%	64%	62%	67%	56%	54%	73%	73%	59%	86%	58%	86%	61%
Business process outsourcing (e.g. payroll, HR, finance)	20	8	12	4	5	1	20	11	10	6	5	4	5	18	2	8	2	10
	59%	50%	67%	57%	83%	100%	59%	52%	67%	55%	50%	67%	71%	67%	29%	67%	33%	63%
Other services	18	8	10	3	2	-	18	12	8	4	3	5	5	16	2	11	1	6
	56%	53%	59%	43%	100%	-	56%	63%	53%	67%	38%	50%	71%	55%	67%	69%	25%	50%

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6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money?

Food and consumer services

Base: All who currently outsource food and consumer services

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	79	32	47	15	15	3	79	49	35	16	27	18	16	64	15	25	16	38
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Good value for money	38	18	20	5	8	3	38	24	18	9	11	9	7	31	7	12	8	18
	48%	56%	43%	33%	53%	100%	48%	49%	51%	56%	41%	50%	44%	48%	47%	48%	50%	47%
Average value for money	28	9	19	7	4	-	28	18	12	6	13	7	2	22	6	7	5	16
	35%	28%	40%	47%	27%	-	35%	37%	34%	38%	48%	39%	13%	34%	40%	28%	31%	42%
Poor value for money	9	3	6	2	3	-	9	4	5	1	1	1	6	7	2	5	2	2
	11%	9%	13%	13%	20%	-	11%	8%	14%	6%	4%	6%	38%	11%	13%	20%	13%	5%
Don't know	4	2	2	1	-	-	4	3	-	-	2	1	1	4	-	1	1	2
	5%	6%	4%	7%	-	-	5%	6%	-	-	7%	6%	6%	6%	-	4%	6%	5%

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6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money?

Technical services / maintenance

Base: All who currently outsource technical services / maintenance

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	90	45	45	18	16	5	90	55	41	23	27	23	15	76	14	29	18	43
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Good value for money	55	28	27	9	10	4	55	34	27	15	16	12	10	45	10	19	8	28
	61%	62%	60%	50%	63%	80%	61%	62%	66%	65%	59%	52%	67%	59%	71%	66%	44%	65%
Average value for money	26	12	14	8	5	1	26	15	11	6	8	9	3	23	3	6	6	14
	29%	27%	31%	44%	31%	20%	29%	27%	27%	26%	30%	39%	20%	30%	21%	21%	33%	33%
Poor value for money	5	3	2	-	1	-	5	3	2	2	1	1	1	4	1	3	2	-
	6%	7%	4%	-	6%	-	6%	5%	5%	9%	4%	4%	7%	5%	7%	10%	11%	-
Don't know	4	2	2	1	-	-	4	3	1	-	2	1	1	4	-	1	2	1
	4%	4%	4%	6%	-	-	4%	5%	2%	-	7%	4%	7%	5%	-	3%	11%	2%

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6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money?

Asset management

Base: All who currently outsource asset management

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	26	8	18	4	5	-	26	20	9	6	7	5	8	24	2	12	5	9
	100%	100%	100%	100%	100%	-	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Good value for money	14	4	10	2	3	-	14	10	6	2	3	4	5	13	1	7	2	5
	54%	50%	56%	50%	60%	-	54%	50%	67%	33%	43%	80%	63%	54%	50%	58%	40%	56%
Average value for money	7	1	6	2	2	-	7	5	3	2	2	1	2	6	1	3	1	3
	27%	13%	33%	50%	40%	-	27%	25%	33%	33%	29%	20%	25%	25%	50%	25%	20%	33%
Poor value for money	2	2	-	-	-	-	2	2	-	2	-	-	-	2	-	1	1	-
	8%	25%	-	-	-	-	8%	10%	-	33%	-	-	-	8%	-	8%	20%	-
Don't know	3	1	2	-	-	-	3	3	-	-	2	-	1	3	-	1	1	1
	12%	13%	11%	-	-	-	12%	15%	-	-	29%	-	13%	13%	-	8%	20%	11%

RICS / Sodexo Global Facilities Management Survey

6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money?

Energy management

Base: All who currently outsource energy management

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	47	18	29	9	8	2	47	31	19	11	12	12	12	41	6	17	8	22
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Good value for money	28	14	14	6	4	1	28	19	10	7	7	8	6	24	4	9	4	15
	60%	78%	48%	67%	50%	50%	60%	61%	53%	64%	58%	67%	50%	59%	67%	53%	50%	68%
Average value for money	12	2	10	1	3	1	12	6	8	3	3	3	3	10	2	5	3	4
	26%	11%	34%	11%	38%	50%	26%	19%	42%	27%	25%	25%	25%	24%	33%	29%	38%	18%
Poor value for money	5	2	3	2	1	-	5	4	1	1	1	1	2	5	-	2	-	3
	11%	11%	10%	22%	13%	-	11%	13%	5%	9%	8%	8%	17%	12%	-	12%	-	14%
Don't know	2	-	2	-	-	-	2	2	-	-	1	-	1	2	-	1	1	-
	4%	-	7%	-	-	-	4%	6%	-	-	8%	-	8%	5%	-	6%	13%	-

RICS / Sodexo Global Facilities Management Survey

6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money?

Project management

Base: All who currently outsource project management

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integrated / bundled	Non-integrated / bundled	Site-based	National	Regional	Global	Europe	Rest of world	Corporate	Industrial	Other
Total	48	17	31	8	11	2	48	34	18	7	13	15	13	39	9	18	8	22
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Good value for money	25	10	15	2	8	1	25	19	9	4	5	8	8	22	3	6	5	14
	52%	59%	48%	25%	73%	50%	52%	56%	50%	57%	38%	53%	62%	56%	33%	33%	63%	64%
Average value for money	17	5	12	4	3	1	17	10	8	2	7	6	2	11	6	8	2	7
	35%	29%	39%	50%	27%	50%	35%	29%	44%	29%	54%	40%	15%	28%	67%	44%	25%	32%
Poor value for money	3	1	2	1	-	-	3	2	1	1	-	-	2	3	-	3	-	-
	6%	6%	6%	13%	-	-	6%	6%	6%	14%	-	-	15%	8%	-	17%	-	-
Don't know	3	1	2	1	-	-	3	3	-	-	1	1	1	3	-	1	1	1
	6%	6%	6%	13%	-	-	6%	9%	-	-	8%	7%	8%	8%	-	6%	13%	5%

RICS / Sodexo Global Facilities Management Survey

6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money?

Workplace design / space management

Base: All who currently outsource workplace design / space management

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	60	24	36	15	11	2	60	39	24	11	22	13	13	51	9	19	11	30
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Good value for money	37	14	23	7	9	1	37	26	13	6	13	8	9	32	5	11	7	19
	62%	58%	64%	47%	82%	50%	62%	67%	54%	55%	59%	62%	69%	63%	56%	58%	64%	63%
Average value for money	19	7	12	7	2	1	19	10	10	3	8	4	4	15	4	6	4	9
	32%	29%	33%	47%	18%	50%	32%	26%	42%	27%	36%	31%	31%	29%	44%	32%	36%	30%
Poor value for money	3	3	-	1	-	-	3	2	1	2	-	1	-	3	-	1	-	2
	5%	13%	-	7%	-	-	5%	5%	4%	18%	-	8%	-	6%	-	5%	-	7%
Don't know	1	-	1	-	-	-	1	1	-	-	1	-	-	1	-	1	-	-
	2%	-	3%	-	-	-	2%	3%	-	-	5%	-	-	2%	-	5%	-	-

RICS / Sodexo Global Facilities Management Survey

6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money?

Security

Base: All who currently outsource security

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	88	41	47	19	14	6	88	55	40	19	29	23	15	73	15	28	19	41
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Good value for money	51	22	29	8	8	3	51	35	21	14	14	10	11	44	7	14	11	26
	58%	54%	62%	42%	57%	50%	58%	64%	53%	74%	48%	43%	73%	60%	47%	50%	58%	63%
Average value for money	25	13	12	7	6	2	25	14	12	3	12	8	2	20	5	7	7	11
	28%	32%	26%	37%	43%	33%	28%	25%	30%	16%	41%	35%	13%	27%	33%	25%	37%	27%
Poor value for money	8	5	3	3	-	1	8	2	6	2	2	3	1	5	3	5	-	3
	9%	12%	6%	16%	-	17%	9%	4%	15%	11%	7%	13%	7%	7%	20%	18%	-	7%
Don't know	4	1	3	1	-	-	4	4	1	-	1	2	1	4	-	2	1	1
	5%	2%	6%	5%	-	-	5%	7%	3%	-	3%	9%	7%	5%	-	7%	5%	2%

RICS / Sodexo Global Facilities Management Survey

6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money?

Cleaning
Base: All who currently outsource cleaning

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	96	47	49	19	16	5	96	57	45	25	30	23	16	79	17	31	19	46
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Good value for money	56	26	30	10	10	4	56	34	27	19	12	12	11	46	10	20	9	27
	58%	55%	61%	53%	63%	80%	58%	60%	60%	76%	40%	52%	69%	58%	59%	65%	47%	59%
Average value for money	27	14	13	7	4	-	27	15	12	5	12	8	2	22	5	5	7	15
	28%	30%	27%	37%	25%	-	28%	26%	27%	20%	40%	35%	13%	28%	29%	16%	37%	33%
Poor value for money	10	6	4	1	2	1	10	5	6	1	5	2	2	8	2	5	2	3
	10%	13%	8%	5%	13%	20%	10%	9%	13%	4%	17%	9%	13%	10%	12%	16%	11%	7%
Don't know	3	1	2	1	-	-	3	3	-	-	1	1	1	3	-	1	1	1
	3%	2%	4%	5%	-	-	3%	5%	-	-	3%	4%	6%	4%	-	3%	5%	2%

RICS / Sodexo Global Facilities Management Survey

6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money?

Waste management

Base: All who currently outsource waste management

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	86	40	46	16	15	5	86	54	37	19	30	21	14	72	14	28	17	41
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Good value for money	52	24	28	8	10	4	52	32	24	12	18	10	10	46	6	16	8	28
	60%	60%	61%	50%	67%	80%	60%	59%	65%	63%	60%	48%	71%	64%	43%	57%	47%	68%
Average value for money	24	13	11	6	5	1	24	14	12	6	9	6	3	17	7	8	6	10
	28%	33%	24%	38%	33%	20%	28%	26%	32%	32%	30%	29%	21%	24%	50%	29%	35%	24%
Poor value for money	3	1	2	1	-	-	3	2	1	1	-	2	-	2	1	2	-	1
	3%	3%	4%	6%	-	-	3%	4%	3%	5%	-	10%	-	3%	7%	7%	-	2%
Don't know	7	2	5	1	-	-	7	6	-	-	3	3	1	7	-	2	3	2
	8%	5%	11%	6%	-	-	8%	11%	-	-	10%	14%	7%	10%	-	7%	18%	5%

RICS / Sodexo Global Facilities Management Survey

6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money?

Real estate - lease administration (e.g. managing or restructuring leases)

Base: All who currently outsource real estate - lease administration (e.g. managing or restructuring leases)

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integrated / bundled	Non-integrated / bundled	Site-based	National	Regional	Global	Europe	Rest of world	Corporate	Industrial	Other
Total	34	12	22	6	10	1	34	26	10	10	11	6	7	30	4	10	8	16
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Good value for money	22	8	14	3	8	1	22	16	8	8	4	5	5	18	4	6	7	9
	65%	67%	64%	50%	80%	100%	65%	62%	80%	80%	36%	83%	71%	60%	100%	60%	88%	56%
Average value for money	9	2	7	2	2	-	9	8	2	2	5	-	2	9	-	3	1	5
	26%	17%	32%	33%	20%	-	26%	31%	20%	20%	45%	-	29%	30%	-	30%	13%	31%
Poor value for money	1	1	-	-	-	-	1	-	-	-	1	-	-	1	-	-	-	1
	3%	8%	-	-	-	-	3%	-	-	-	9%	-	-	3%	-	-	-	6%
Don't know	2	1	1	1	-	-	2	2	-	-	1	1	-	2	-	1	-	1
	6%	8%	5%	17%	-	-	6%	8%	-	-	9%	17%	-	7%	-	10%	-	6%

RICS / Sodexo Global Facilities Management Survey

6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money?

Real estate - portfolio strategy (e.g. optimising the use and numbers of buildings)

Base: All who currently outsource real estate - portfolio strategy (e.g. optimising the use and numbers of buildings)

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	13	5	8	4	2	-	13	9	5	5	2	3	3	11	2	5	4	4
	100%	100%	100%	100%	100%	-	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Good value for money	10	5	5	2	2	-	10	6	5	4	1	3	2	8	2	4	3	3
	77%	100%	63%	50%	100%	-	77%	67%	100%	80%	50%	100%	67%	73%	100%	80%	75%	75%
Average value for money	3	-	3	2	-	-	3	3	-	1	1	-	1	3	-	1	1	1
	23%	-	38%	50%	-	-	23%	33%	-	20%	50%	-	33%	27%	-	20%	25%	25%
Poor value for money	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

RICS / Sodexo Global Facilities Management Survey

6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money?

Real estate - transactions (e.g. buying and selling real estate)

Base: All who currently outsource real estate - transactions (e.g. buying and selling real estate)

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	44	17	27	8	12	2	44	29	18	9	13	11	11	37	7	19	7	18
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Good value for money	28	11	17	4	10	1	28	18	12	5	7	8	8	22	6	11	6	11
	64%	65%	63%	50%	83%	50%	64%	62%	67%	56%	54%	73%	73%	59%	86%	58%	86%	61%
Average value for money	12	4	8	3	2	-	12	8	4	3	5	1	3	11	1	6	1	5
	27%	24%	30%	38%	17%	-	27%	28%	22%	33%	38%	9%	27%	30%	14%	32%	14%	28%
Poor value for money	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Don't know	4	2	2	1	-	1	4	3	2	1	1	2	-	4	-	2	-	2
	9%	12%	7%	13%	-	50%	9%	10%	11%	11%	8%	18%	-	11%	-	11%	-	11%

RICS / Sodexo Global Facilities Management Survey

6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money?

Business process outsourcing (e.g. payroll, HR, finance)

Base: All who currently outsource business process outsourcing (e.g. payroll, HR, finance)

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	34	16	18	7	6	1	34	21	15	11	10	6	7	27	7	12	6	16
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Good value for money	20	8	12	4	5	1	20	11	10	6	5	4	5	18	2	8	2	10
	59%	50%	67%	57%	83%	100%	59%	52%	67%	55%	50%	67%	71%	67%	29%	67%	33%	63%
Average value for money	6	3	3	2	-	-	6	5	2	2	2	1	1	2	4	2	2	2
	18%	19%	17%	29%	-	-	18%	24%	13%	18%	20%	17%	14%	7%	57%	17%	33%	13%
Poor value for money	2	1	1	-	1	-	2	1	1	-	2	-	-	2	-	-	1	1
	6%	6%	6%	-	17%	-	6%	5%	7%	-	20%	-	-	7%	-	-	17%	6%
Don't know	6	4	2	1	-	-	6	4	2	3	1	1	1	5	1	2	1	3
	18%	25%	11%	14%	-	-	18%	19%	13%	27%	10%	17%	14%	19%	14%	17%	17%	19%

RICS / Sodexo Global Facilities Management Survey

6. Of the services that you outsource, do you consider each of these to offer good value for money, average value for money or poor value for money?

Other services

Base: All who currently outsource other services

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integrated / bundled	Non-integrated / bundled	Site-based	National	Regional	Global	Europe	Rest of world	Corporate	Industrial	Other
Total	32	15	17	7	2	1	32	19	15	6	8	10	7	29	3	16	4	12
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Good value for money	18	8	10	3	2	-	18	12	8	4	3	5	5	16	2	11	1	6
	56%	53%	59%	43%	100%	-	56%	63%	53%	67%	38%	50%	71%	55%	67%	69%	25%	50%
Average value for money	8	5	3	3	-	1	8	4	4	1	2	5	-	7	1	1	2	5
	25%	33%	18%	43%	-	100%	25%	21%	27%	17%	25%	50%	-	24%	33%	6%	50%	42%
Poor value for money	3	1	2	1	-	-	3	1	2	1	1	-	1	3	-	2	-	1
	9%	7%	12%	14%	-	-	9%	5%	13%	17%	13%	-	14%	10%	-	13%	-	8%
Don't know	3	1	2	-	-	-	3	2	1	-	2	-	1	3	-	2	1	-
	9%	7%	12%	-	-	-	9%	11%	7%	-	25%	-	14%	10%	-	13%	25%	-

RICS / Sodexo Global Facilities Management Survey

7. Which of the following services, if any, do you currently incorporate into integrated or bundled outsourcing? And which would you consider incorporating into integrated or bundled outsourcing in the next two years?

Summary table

Base: All who currently make use of integrated or bundled outsourcing and outsource at least one service or plan to outsource in the future

	Current	Future
Total	57 100%	101 100%
Food and consumer services	33 58%	44 44%
Technical services / maintenance	38 67%	50 50%
Asset management	10 18%	23 23%
Energy management	15 26%	32 32%
Project management	19 33%	26 26%
Workplace design / space management	18 32%	24 24%
Security	32 56%	46 46%
Cleaning	40 70%	52 51%
Waste management	29 51%	43 43%
Real estate - lease administration (e.g. managing or restructuring leases)	10 18%	18 18%
Real estate - portfolio strategy (e.g. optimising the use and numbers of buildings)	2 4%	17 17%
Real estate - transactions (e.g. buying and selling real estate)	11 19%	20 20%

RICS / Sodexo Global Facilities Management Survey

7. Which of the following services, if any, do you currently incorporate into integrated or bundled outsourcing? And which would you consider incorporating into integrated or bundled outsourcing in the next two years?

Summary table

Base: All who currently make use of integrated or bundled outsourcing and outsource at least one service or plan to outsource in the future

	Current	Future
Total	57 100%	101 100%
Business process outsourcing (e.g. payroll, HR, finance)	9 16%	20 20%
Other services	6 11%	10 10%
None of the above	10 18%	32 32%
Not Stated	- -	2 2%
Nets		
Hard services	41 72%	55 54%
Soft services	42 74%	56 55%
Real estate services	12 21%	23 23%

RICS / Sodexo Global Facilities Management Survey

7. Which of the following services, if any, do you currently incorporate into integrated or bundled outsourcing? And which would you consider incorporating into integrated or bundled outsourcing in the next two years?

Current

Base: All who currently make use of integrated or bundled outsourcing and outsource at least one service

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integrated / bundled	Non-integrated / bundled	Site-based	National	Regional	Global	Europe	Rest of world	Corporate	Industrial	Other
Total	57	26	31	9	9	2	57	57	7	14	15	16	10	48	9	16	10	31
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Cleaning	40	14	26	7	7	1	40	40	5	11	12	9	7	35	5	11	7	22
	70%	54%	84%	78%	78%	50%	70%	70%	71%	79%	80%	56%	70%	73%	56%	69%	70%	71%
Technical services / maintenance	38	15	23	7	7	1	38	38	4	9	13	8	7	33	5	10	8	20
	67%	58%	74%	78%	78%	50%	67%	67%	57%	64%	87%	50%	70%	69%	56%	63%	80%	65%
Food and consumer services	33	10	23	6	4	1	33	33	4	8	8	9	7	28	5	11	6	16
	58%	38%	74%	67%	44%	50%	58%	58%	57%	57%	53%	56%	70%	58%	56%	69%	60%	52%
Security	32	11	21	6	7	-	32	32	3	8	12	8	4	27	5	6	7	19
	56%	42%	68%	67%	78%	-	56%	56%	43%	57%	80%	50%	40%	56%	56%	38%	70%	61%
Waste management	29	9	20	6	5	-	29	29	2	7	9	8	5	26	3	7	5	17
	51%	35%	65%	67%	56%	-	51%	51%	29%	50%	60%	50%	50%	54%	33%	44%	50%	55%
Project management	19	4	15	1	4	-	19	19	-	4	5	4	6	17	2	6	4	9
	33%	15%	48%	11%	44%	-	33%	33%	-	29%	33%	25%	60%	35%	22%	38%	40%	29%
Workplace design / space management	18	6	12	2	5	-	18	18	-	6	6	2	4	17	1	3	4	11
	32%	23%	39%	22%	56%	-	32%	32%	-	43%	40%	13%	40%	35%	11%	19%	40%	35%
Energy management	15	5	10	2	3	-	15	15	-	6	4	2	3	12	3	5	3	7
	26%	19%	32%	22%	33%	-	26%	26%	-	43%	27%	13%	30%	25%	33%	31%	30%	23%
Real estate - transactions (e.g. buying and selling real estate)	11	3	8	2	5	-	11	11	1	2	4	2	3	10	1	1	3	7
	19%	12%	26%	22%	56%	-	19%	19%	14%	14%	27%	13%	30%	21%	11%	6%	30%	23%
Asset management	10	4	6	1	2	-	10	10	-	4	2	1	3	9	1	3	3	4
	18%	15%	19%	11%	22%	-	18%	18%	-	29%	13%	6%	30%	19%	11%	19%	30%	13%
Real estate - lease administration (e.g. managing or restructuring leases)	10	2	8	1	5	-	10	10	1	2	5	1	2	9	1	1	2	7
	18%	8%	26%	11%	56%	-	18%	18%	14%	14%	33%	6%	20%	19%	11%	6%	20%	23%

RICS / Sodexo Global Facilities Management Survey

7. Which of the following services, if any, do you currently incorporate into integrated or bundled outsourcing? And which would you consider incorporating into integrated or bundled outsourcing in the next two years?

Current

Base: All who currently make use of integrated or bundled outsourcing and outsource at least one service

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integrated / bundled	Non-integrated / bundled	Site-based	National	Regional	Global	Europe	Rest of world	Corporate	Industrial	Other
Total	57	26	31	9	9	2	57	57	7	14	15	16	10	48	9	16	10	31
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Business process outsourcing (e.g. payroll, HR, finance)	9	4	5	2	2	-	9	9	-	2	4	1	2	7	2	4	-	5
	16%	15%	16%	22%	22%	-	16%	16%	-	14%	27%	6%	20%	15%	22%	25%	-	16%
Real estate - portfolio strategy (e.g. optimising the use and numbers of buildings)	2	1	1	1	1	-	2	2	-	2	-	-	-	1	1	-	1	1
	4%	4%	3%	11%	11%	-	4%	4%	-	14%	-	-	-	2%	11%	-	10%	3%
Other services	6	2	4	1	-	-	6	6	-	-	1	2	3	5	1	5	-	1
	11%	8%	13%	11%	-	-	11%	11%	-	-	7%	13%	30%	10%	11%	31%	-	3%
None of the above	10	7	3	-	1	1	10	10	2	3	1	4	1	8	2	3	2	5
	18%	27%	10%	-	11%	50%	18%	18%	29%	21%	7%	25%	10%	17%	22%	19%	20%	16%
Nets																		
Hard services	41	15	26	7	8	1	41	41	4	10	13	9	8	35	6	10	8	23
	72%	58%	84%	78%	89%	50%	72%	72%	57%	71%	87%	56%	80%	73%	67%	63%	80%	74%
Soft services	42	16	26	8	7	1	42	42	5	11	12	11	7	36	6	11	8	23
	74%	62%	84%	89%	78%	50%	74%	74%	71%	79%	80%	69%	70%	75%	67%	69%	80%	74%
Real estate services	12	3	9	2	5	-	12	12	1	2	5	2	3	11	1	1	3	8
	21%	12%	29%	22%	56%	-	21%	21%	14%	14%	33%	13%	30%	23%	11%	6%	30%	26%

RICS / Sodexo Global Facilities Management Survey

7. Which of the following services, if any, do you currently incorporate into integrated or bundled outsourcing? And which would you consider incorporating into integrated or bundled outsourcing in the next two years?

Future

Base: All who plan to outsource services in the future

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integrated / bundled	Non-integrated / bundled	Site-based	National	Regional	Global	Europe	Rest of world	Corporate	Industrial	Other
Total	101	49	52	21	17	9	98	56	47	28	30	25	16	84	17	32	19	50
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Cleaning	52	25	27	12	13	4	50	32	20	14	16	15	7	40	12	11	15	26
	51%	51%	52%	57%	76%	44%	51%	57%	43%	50%	53%	60%	44%	48%	71%	34%	79%	52%
Technical services / maintenance	50	24	26	13	13	4	48	32	18	13	14	16	7	39	11	11	13	26
	50%	49%	50%	62%	76%	44%	49%	57%	38%	46%	47%	64%	44%	46%	65%	34%	68%	52%
Security	46	22	24	11	11	4	44	31	16	11	14	15	6	36	10	9	15	22
	46%	45%	46%	52%	65%	44%	45%	55%	34%	39%	47%	60%	38%	43%	59%	28%	79%	44%
Food and consumer services	44	18	26	11	11	4	42	28	15	9	12	16	7	35	9	13	12	19
	44%	37%	50%	52%	65%	44%	43%	50%	32%	32%	40%	64%	44%	42%	53%	41%	63%	38%
Waste management	43	20	23	10	13	3	41	29	14	9	15	14	5	33	10	9	10	24
	43%	41%	44%	48%	76%	33%	42%	52%	30%	32%	50%	56%	31%	39%	59%	28%	53%	48%
Energy management	32	16	16	8	10	3	30	23	8	7	10	11	4	24	8	8	6	18
	32%	33%	31%	38%	59%	33%	31%	41%	17%	25%	33%	44%	25%	29%	47%	25%	32%	36%
Project management	26	10	16	4	8	2	25	18	8	4	9	9	4	16	10	6	6	14
	26%	20%	31%	19%	47%	22%	26%	32%	17%	14%	30%	36%	25%	19%	59%	19%	32%	28%
Workplace design / space management	24	11	13	8	7	2	23	15	8	4	7	10	3	17	7	5	5	14
	24%	22%	25%	38%	41%	22%	23%	27%	17%	14%	23%	40%	19%	20%	41%	16%	26%	28%
Asset management	23	11	12	5	9	3	22	17	6	5	6	6	6	17	6	5	6	12
	23%	22%	23%	24%	53%	33%	22%	30%	13%	18%	20%	24%	38%	20%	35%	16%	32%	24%
Real estate - transactions (e.g. buying and selling real estate)	20	8	12	5	10	4	18	13	6	3	5	7	5	15	5	5	4	11
	20%	16%	23%	24%	59%	44%	18%	23%	13%	11%	17%	28%	31%	18%	29%	16%	21%	22%
Business process outsourcing (e.g. payroll, HR, finance)	20	9	11	6	9	4	18	14	5	4	5	7	4	16	4	5	3	12
	20%	18%	21%	29%	53%	44%	18%	25%	11%	14%	17%	28%	25%	19%	24%	16%	16%	24%

RICS / Sodexo Global Facilities Management Survey

7. Which of the following services, if any, do you currently incorporate into integrated or bundled outsourcing? And which would you consider incorporating into integrated or bundled outsourcing in the next two years?

Future

Base: All who plan to outsource services in the future

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integrated / bundled	Non-integrated / bundled	Site-based	National	Regional	Global	Europe	Rest of world	Corporate	Industrial	Other
Total	101	49	52	21	17	9	98	56	47	28	30	25	16	84	17	32	19	50
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Real estate - lease administration (e.g. managing or restructuring leases)	18	7	11	4	9	3	16	12	5	4	6	6	2	14	4	3	4	11
	18%	14%	21%	19%	53%	33%	16%	21%	11%	14%	20%	24%	13%	17%	24%	9%	21%	22%
Real estate - portfolio strategy (e.g. optimising the use and numbers of buildings)	17	8	9	5	8	5	14	10	4	5	2	5	5	13	4	2	5	10
	17%	16%	17%	24%	47%	56%	14%	18%	9%	18%	7%	20%	31%	15%	24%	6%	26%	20%
Other services	10	4	6	2	-	-	10	5	6	1	3	4	2	8	2	4	2	4
	10%	8%	12%	10%	-	-	10%	9%	13%	4%	10%	16%	13%	10%	12%	13%	11%	8%
None of the above	32	16	16	5	3	1	32	16	18	11	8	6	5	30	2	13	4	15
	32%	33%	31%	24%	18%	11%	33%	29%	38%	39%	27%	24%	31%	36%	12%	41%	21%	30%
Not Stated	2	2	-	1	-	2	2	-	2	1	-	1	-	2	-	-	-	2
	2%	4%	-	5%	-	22%	2%	-	4%	4%	-	4%	-	2%	-	-	-	4%
Nets																		
Hard services	55	27	28	14	14	5	53	35	20	13	16	17	9	42	13	14	13	28
	54%	55%	54%	67%	82%	56%	54%	63%	43%	46%	53%	68%	56%	50%	76%	44%	68%	56%
Soft services	56	27	29	13	13	4	54	35	22	15	17	16	8	43	13	12	15	29
	55%	55%	56%	62%	76%	44%	55%	63%	47%	54%	57%	64%	50%	51%	76%	38%	79%	58%
Real estate services	23	9	14	5	10	5	20	15	6	5	6	7	5	17	6	5	5	13
	23%	18%	27%	24%	59%	56%	20%	27%	13%	18%	20%	28%	31%	20%	35%	16%	26%	26%

RICS / Sodexo Global Facilities Management Survey

7. Which of the following services, if any, do you currently incorporate into integrated or bundled outsourcing? And which would you consider incorporating into integrated or bundled outsourcing in the next two years?

Future

Base: All who do not currently use the service

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	101	49	52	21	17	9	98	56	47	28	30	25	16	84	17	32	19	50
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Real estate - transactions (e.g. buying and selling real estate)	10	5	5	3	5	4	8	3	5	1	1	5	3	6	4	4	1	5
	11%	11%	11%	16%	42%	44%	9%	7%	11%	4%	4%	22%	23%	8%	25%	13%	6%	12%
Business process outsourcing (e.g. payroll, HR, finance)	14	6	8	4	7	4	12	8	5	2	2	6	4	11	3	4	3	7
	15%	13%	17%	21%	47%	44%	13%	17%	11%	8%	8%	25%	29%	14%	20%	14%	16%	16%
Other services	8	4	4	2	-	-	8	3	6	1	3	4	-	6	2	2	2	4
	8%	9%	8%	10%	-	-	9%	6%	13%	4%	10%	17%	-	8%	13%	7%	11%	8%
None of the above	32	16	16	5	3	1	32	16	18	11	8	6	5	30	2	13	4	15
	32%	33%	31%	24%	18%	11%	33%	29%	38%	39%	27%	24%	31%	36%	12%	41%	21%	30%

RICS / Sodexo Global Facilities Management Survey

8. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following advantages in influencing your decision?

Summary table

Base: All respondents

	Total	Very important	Fairly important	Not very important	Not at all important	Don't know	Nets: Important	Nets: Not important
Having a single point of contact and accountability	105	71	30	3	1	-	101	4
	100%	68%	29%	3%	1%	-	96%	4%
Consolidated KPIs (key performance indicators) and performance reporting	105	57	35	11	2	-	92	13
	100%	54%	33%	10%	2%	-	88%	12%
The extent to which the outsourcing company conducts work itself, rather than subcontracting	105	43	39	19	3	1	82	22
	100%	41%	37%	18%	3%	1%	78%	21%
Cost efficiencies	105	79	22	1	3	-	101	4
	100%	75%	21%	1%	3%	-	96%	4%
Transfer of risk to an outsourcing company	105	36	49	13	3	4	85	16
	100%	34%	47%	12%	3%	4%	81%	15%
Improvements to the workplace environment or employee well-being	105	54	38	9	4	-	92	13
	100%	51%	36%	9%	4%	-	88%	12%
Integration of real estate and facilities management services	105	25	41	22	14	3	66	36
	100%	24%	39%	21%	13%	3%	63%	34%
Increased flexibility	105	50	42	8	5	-	92	13
	100%	48%	40%	8%	5%	-	88%	12%

RICS / Sodexo Global Facilities Management Survey

8. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following advantages in influencing your decision?

Summary table - net very important

Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Cost efficiencies	79	41	38	16	14	10	75	43	36	23	23	19	12	65	14	24	15	40
	75%	77%	73%	76%	82%	83%	76%	75%	75%	82%	77%	68%	71%	74%	82%	75%	79%	74%
Having a single point of contact and accountability	71	36	35	12	12	7	69	40	35	18	20	21	11	59	12	21	17	33
	68%	68%	67%	57%	71%	58%	70%	70%	73%	64%	67%	75%	65%	67%	71%	66%	89%	61%
Consolidated KPIs (key performance indicators) and performance reporting	57	26	31	8	12	4	56	33	29	14	18	14	10	48	9	18	12	27
	54%	49%	60%	38%	71%	33%	57%	58%	60%	50%	60%	50%	59%	55%	53%	56%	63%	50%
Improvements to the workplace environment or employee well-being	54	21	33	8	11	5	54	34	25	13	16	11	12	43	11	17	12	25
	51%	40%	63%	38%	65%	42%	55%	60%	52%	46%	53%	39%	71%	49%	65%	53%	63%	46%
Increased flexibility	50	27	23	9	8	7	47	24	27	14	17	11	7	43	7	17	11	22
	48%	51%	44%	43%	47%	58%	47%	42%	56%	50%	57%	39%	41%	49%	41%	53%	58%	41%
The extent to which the outsourcing company conducts work itself, rather than subcontracting	43	24	19	8	8	6	41	22	22	10	9	14	9	37	6	13	11	19
	41%	45%	37%	38%	47%	50%	41%	39%	46%	36%	30%	50%	53%	42%	35%	41%	58%	35%
Transfer of risk to an outsourcing company	36	18	18	8	5	4	35	19	19	7	11	11	7	29	7	17	10	9
	34%	34%	35%	38%	29%	33%	35%	33%	40%	25%	37%	39%	41%	33%	41%	53%	53%	17%
Integration of real estate and facilities management services	25	15	10	6	3	4	24	15	10	6	3	9	7	23	2	10	4	11
	24%	28%	19%	29%	18%	33%	24%	26%	21%	21%	10%	32%	41%	26%	12%	31%	21%	20%

RICS / Sodexo Global Facilities Management Survey

8. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following advantages in influencing your decision?

Having a single point of contact and accountability

Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	105 100%	53 100%	52 100%	21 100%	17 100%	12 100%	99 100%	57 100%	48 100%	28 100%	30 100%	28 100%	17 100%	88 100%	17 100%	32 100%	19 100%	54 100%
Very important	71 68%	36 68%	35 67%	12 57%	12 71%	7 58%	69 70%	40 70%	35 73%	18 64%	20 67%	21 75%	11 65%	59 67%	12 71%	21 66%	17 89%	33 61%
Fairly important	30 29%	15 28%	15 29%	8 38%	5 29%	4 33%	27 27%	15 26%	12 25%	9 32%	10 33%	6 21%	4 24%	26 30%	4 24%	8 25%	2 11%	20 37%
Not very important	3 3%	1 2%	2 4%	- -	- -	1 8%	2 2%	2 4%	- -	- -	- -	1 4%	2 12%	2 2%	1 6%	2 6%	- -	1 2%
Not at all important	1 1%	1 2%	- -	1 5%	- -	- -	1 1%	- -	1 2%	1 4%	- -	- -	- -	1 1%	- -	1 3%	- -	- -
Don't know	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -
Nets																		
Important	101 96%	51 96%	50 96%	20 95%	17 100%	11 92%	96 97%	55 96%	47 98%	27 96%	30 100%	27 96%	15 88%	85 97%	16 94%	29 91%	19 100%	53 98%
Not important	4 4%	2 4%	2 4%	1 5%	- -	1 8%	3 3%	2 4%	1 2%	1 4%	- -	1 4%	2 12%	3 3%	1 6%	3 9%	- -	1 2%

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8. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following advantages in influencing your decision?

Consolidated KPIs (key performance indicators) and performance reporting

Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integrated / bundled	Non-integrated / bundled	Site-based	National	Regional	Global	Europe	Rest of world	Corporate	Industrial	Other
Total	105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	57	26	31	8	12	4	56	33	29	14	18	14	10	48	9	18	12	27
	54%	49%	60%	38%	71%	33%	57%	58%	60%	50%	60%	50%	59%	55%	53%	56%	63%	50%
Fairly important	35	17	18	6	5	4	32	19	13	9	12	10	3	27	8	11	6	18
	33%	32%	35%	29%	29%	33%	32%	33%	27%	32%	40%	36%	18%	31%	47%	34%	32%	33%
Not very important	11	8	3	5	-	4	9	5	4	3	-	4	4	11	-	1	1	9
	10%	15%	6%	24%	-	33%	9%	9%	8%	11%	-	14%	24%	13%	-	3%	5%	17%
Not at all important	2	2	-	2	-	-	2	-	2	2	-	-	-	2	-	2	-	-
	2%	4%	-	10%	-	-	2%	-	4%	7%	-	-	-	2%	-	6%	-	-
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Nets																		
Important	92	43	49	14	17	8	88	52	42	23	30	24	13	75	17	29	18	45
	88%	81%	94%	67%	100%	67%	89%	91%	88%	82%	100%	86%	76%	85%	100%	91%	95%	83%
Not important	13	10	3	7	-	4	11	5	6	5	-	4	4	13	-	3	1	9
	12%	19%	6%	33%	-	33%	11%	9%	13%	18%	-	14%	24%	15%	-	9%	5%	17%

RICS / Sodexo Global Facilities Management Survey

8. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following advantages in influencing your decision?

The extent to which the outsourcing company conducts work itself, rather than subcontracting

Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	105 100%	53 100%	52 100%	21 100%	17 100%	12 100%	99 100%	57 100%	48 100%	28 100%	30 100%	28 100%	17 100%	88 100%	17 100%	32 100%	19 100%	54 100%
Very important	43 41%	24 45%	19 37%	8 38%	8 47%	6 50%	41 41%	22 39%	22 46%	10 36%	9 30%	14 50%	9 53%	37 42%	6 35%	13 41%	11 58%	19 35%
Fairly important	39 37%	20 38%	19 37%	7 33%	7 41%	4 33%	37 37%	26 46%	13 27%	10 36%	16 53%	9 32%	3 18%	31 35%	8 47%	10 31%	5 26%	24 44%
Not very important	19 18%	6 11%	13 25%	5 24%	2 12%	1 8%	18 18%	8 14%	11 23%	6 21%	5 17%	5 18%	3 18%	16 18%	3 18%	7 22%	3 16%	9 17%
Not at all important	3 3%	2 4%	1 2%	1 5%	- -	1 8%	2 2%	1 2%	1 2%	1 4%	- -	- -	2 12%	3 3%	- -	2 6%	- -	1 2%
Don't know	1 1%	1 2%	- -	- -	- -	- -	1 1%	- -	1 2%	1 4%	- -	- -	- -	1 1%	- -	- -	- -	1 2%
Nets																		
Important	82 78%	44 83%	38 73%	15 71%	15 88%	10 83%	78 79%	48 84%	35 73%	20 71%	25 83%	23 82%	12 71%	68 77%	14 82%	23 72%	16 84%	43 80%
Not important	22 21%	8 15%	14 27%	6 29%	2 12%	2 17%	20 20%	9 16%	12 25%	7 25%	5 17%	5 18%	5 29%	19 22%	3 18%	9 28%	3 16%	10 19%

RICS / Sodexo Global Facilities Management Survey

8. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following advantages in influencing your decision?

Cost efficiencies

Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integrated / bundled	Non-integrated / bundled	Site-based	National	Regional	Global	Europe	Rest of world	Corporate	Industrial	Other
Total	105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	79	41	38	16	14	10	75	43	36	23	23	19	12	65	14	24	15	40
	75%	77%	73%	76%	82%	83%	76%	75%	75%	82%	77%	68%	71%	74%	82%	75%	79%	74%
Fairly important	22	9	13	3	3	2	20	12	10	4	5	8	5	19	3	6	4	12
	21%	17%	25%	14%	18%	17%	20%	21%	21%	14%	17%	29%	29%	22%	18%	19%	21%	22%
Not very important	1	1	-	-	-	-	1	1	-	-	1	-	-	1	-	-	-	1
	1%	2%	-	-	-	-	1%	2%	-	-	3%	-	-	1%	-	-	-	2%
Not at all important	3	2	1	2	-	-	3	1	2	1	1	1	-	3	-	2	-	1
	3%	4%	2%	10%	-	-	3%	2%	4%	4%	3%	4%	-	3%	-	6%	-	2%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Nets																		
Important	101	50	51	19	17	12	95	55	46	27	28	27	17	84	17	30	19	52
	96%	94%	98%	90%	100%	100%	96%	96%	96%	96%	93%	96%	100%	95%	100%	94%	100%	96%
Not important	4	3	1	2	-	-	4	2	2	1	2	1	-	4	-	2	-	2
	4%	6%	2%	10%	-	-	4%	4%	4%	4%	7%	4%	-	5%	-	6%	-	4%

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8. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following advantages in influencing your decision?

Transfer of risk to an outsourcing company

Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	36	18	18	8	5	4	35	19	19	7	11	11	7	29	7	17	10	9
	34%	34%	35%	38%	29%	33%	35%	33%	40%	25%	37%	39%	41%	33%	41%	53%	53%	17%
Fairly important	49	23	26	9	12	7	45	30	18	13	14	12	8	40	9	11	7	31
	47%	43%	50%	43%	71%	58%	45%	53%	38%	46%	47%	43%	47%	45%	53%	34%	37%	57%
Not very important	13	7	6	3	-	1	12	5	7	4	4	4	1	13	-	2	1	10
	12%	13%	12%	14%	-	8%	12%	9%	15%	14%	13%	14%	6%	15%	-	6%	5%	19%
Not at all important	3	2	1	1	-	-	3	1	2	2	-	-	1	2	1	1	1	1
	3%	4%	2%	5%	-	-	3%	2%	4%	7%	-	-	6%	2%	6%	3%	5%	2%
Don't know	4	3	1	-	-	-	4	2	2	2	1	1	-	4	-	1	-	3
	4%	6%	2%	-	-	-	4%	4%	4%	7%	3%	4%	-	5%	-	3%	-	6%
Nets																		
Important	85	41	44	17	17	11	80	49	37	20	25	23	15	69	16	28	17	40
	81%	77%	85%	81%	100%	92%	81%	86%	77%	71%	83%	82%	88%	78%	94%	88%	89%	74%
Not important	16	9	7	4	-	1	15	6	9	6	4	4	2	15	1	3	2	11
	15%	17%	13%	19%	-	8%	15%	11%	19%	21%	13%	14%	12%	17%	6%	9%	11%	20%

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8. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following advantages in influencing your decision?

Improvements to the workplace environment or employee well-being

Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	54	21	33	8	11	5	54	34	25	13	16	11	12	43	11	17	12	25
	51%	40%	63%	38%	65%	42%	55%	60%	52%	46%	53%	39%	71%	49%	65%	53%	63%	46%
Fairly important	38	24	14	8	5	5	33	19	15	11	10	14	3	32	6	9	7	22
	36%	45%	27%	38%	29%	42%	33%	33%	31%	39%	33%	50%	18%	36%	35%	28%	37%	41%
Not very important	9	6	3	4	1	2	8	4	4	2	2	3	2	9	-	4	-	5
	9%	11%	6%	19%	6%	17%	8%	7%	8%	7%	7%	11%	12%	10%	-	13%	-	9%
Not at all important	4	2	2	1	-	-	4	-	4	2	2	-	-	4	-	2	-	2
	4%	4%	4%	5%	-	-	4%	-	8%	7%	7%	-	-	5%	-	6%	-	4%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Nets																		
Important	92	45	47	16	16	10	87	53	40	24	26	25	15	75	17	26	19	47
	88%	85%	90%	76%	94%	83%	88%	93%	83%	86%	87%	89%	88%	85%	100%	81%	100%	87%
Not important	13	8	5	5	1	2	12	4	8	4	4	3	2	13	-	6	-	7
	12%	15%	10%	24%	6%	17%	12%	7%	17%	14%	13%	11%	12%	15%	-	19%	-	13%

ComRes
Fieldwork: 17th September - 28th November 2014

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8. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following advantages in influencing your decision?

Integration of real estate and facilities management services

Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	25	15	10	6	3	4	24	15	10	6	3	9	7	23	2	10	4	11
	24%	28%	19%	29%	18%	33%	24%	26%	21%	21%	10%	32%	41%	26%	12%	31%	21%	20%
Fairly important	41	21	20	7	8	6	36	21	20	10	13	9	7	34	7	11	3	27
	39%	40%	38%	33%	47%	50%	36%	37%	42%	36%	43%	32%	41%	39%	41%	34%	16%	50%
Not very important	22	11	11	6	4	2	22	14	8	7	5	8	2	18	4	6	6	10
	21%	21%	21%	29%	24%	17%	22%	25%	17%	25%	17%	29%	12%	20%	24%	19%	32%	19%
Not at all important	14	5	9	2	2	-	14	5	8	5	7	1	1	11	3	2	6	6
	13%	9%	17%	10%	12%	-	14%	9%	17%	18%	23%	4%	6%	13%	18%	6%	32%	11%
Don't know	3	1	2	-	-	-	3	2	2	-	2	1	-	2	1	3	-	-
	3%	2%	4%	-	-	-	3%	4%	4%	-	7%	4%	-	2%	6%	9%	-	-
Nets																		
Important	66	36	30	13	11	10	60	36	30	16	16	18	14	57	9	21	7	38
	63%	68%	58%	62%	65%	83%	61%	63%	63%	57%	53%	64%	82%	65%	53%	66%	37%	70%
Not important	36	16	20	8	6	2	36	19	16	12	12	9	3	29	7	8	12	16
	34%	30%	38%	38%	35%	17%	36%	33%	33%	43%	40%	32%	18%	33%	41%	25%	63%	30%

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8. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following advantages in influencing your decision?

Increased flexibility

Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	50	27	23	9	8	7	47	24	27	14	17	11	7	43	7	17	11	22
	48%	51%	44%	43%	47%	58%	47%	42%	56%	50%	57%	39%	41%	49%	41%	53%	58%	41%
Fairly important	42	20	22	7	7	3	41	28	15	11	11	13	7	32	10	9	6	27
	40%	38%	42%	33%	41%	25%	41%	49%	31%	39%	37%	46%	41%	36%	59%	28%	32%	50%
Not very important	8	3	5	3	1	2	6	3	3	2	-	3	2	8	-	3	2	3
	8%	6%	10%	14%	6%	17%	6%	5%	6%	7%	-	11%	12%	9%	-	9%	11%	6%
Not at all important	5	3	2	2	1	-	5	2	3	1	2	1	1	5	-	3	-	2
	5%	6%	4%	10%	6%	-	5%	4%	6%	4%	7%	4%	6%	6%	-	9%	-	4%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Nets																		
Important	92	47	45	16	15	10	88	52	42	25	28	24	14	75	17	26	17	49
	88%	89%	87%	76%	88%	83%	89%	91%	88%	89%	93%	86%	82%	85%	100%	81%	89%	91%
Not important	13	6	7	5	2	2	11	5	6	3	2	4	3	13	-	6	2	5
	12%	11%	13%	24%	12%	17%	11%	9%	13%	11%	7%	14%	18%	15%	-	19%	11%	9%

RICS / Sodexo Global Facilities Management Survey

9. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following disadvantages in influencing your decision?

Summary table
Base: All respondents

							Nets	
	Total	Very important	Fairly important	Not very important	Not at all important	Don't know	Important	Not important
High costs	105	77	27	-	1	-	104	1
	100%	73%	26%	-	1%	-	99%	1%
Lack of standard processes	105	57	34	10	2	2	91	12
	100%	54%	32%	10%	2%	2%	87%	11%
Inadequate KPIs and performance reporting	105	61	32	10	2	-	93	12
	100%	58%	30%	10%	2%	-	89%	11%
Lack of service capability	105	85	15	4	1	-	100	5
	100%	81%	14%	4%	1%	-	95%	5%
Lack of service expertise	105	83	15	5	2	-	98	7
	100%	79%	14%	5%	2%	-	93%	7%
Limited geographical presence	105	44	30	24	5	2	74	29
	100%	42%	29%	23%	5%	2%	70%	28%
Lack of innovation	105	56	38	7	4	-	94	11
	100%	53%	36%	7%	4%	-	90%	10%
Lack of experience in your industry	105	58	26	17	3	1	84	20
	100%	55%	25%	16%	3%	1%	80%	19%
Poor cultural fit with your organisation	105	70	26	7	2	-	96	9
	100%	67%	25%	7%	2%	-	91%	9%

RICS / Sodexo Global Facilities Management Survey

9. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following disadvantages in influencing your decision?

Summary table - net very important

Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Lack of service capability	85	43	42	14	15	10	81	48	38	23	23	24	13	70	15	25	17	43
	81%	81%	81%	67%	88%	83%	82%	84%	79%	82%	77%	86%	76%	80%	88%	78%	89%	80%
Lack of service expertise	83	41	42	15	16	9	80	49	37	21	23	22	15	70	13	23	16	44
	79%	77%	81%	71%	94%	75%	81%	86%	77%	75%	77%	79%	88%	80%	76%	72%	84%	81%
High costs	77	41	36	17	16	11	72	43	33	19	22	21	14	67	10	18	17	42
	73%	77%	69%	81%	94%	92%	73%	75%	69%	68%	73%	75%	82%	76%	59%	56%	89%	78%
Poor cultural fit with your organisation	70	28	42	11	14	10	65	38	34	19	19	20	10	57	13	22	11	37
	67%	53%	81%	52%	82%	83%	66%	67%	71%	68%	63%	71%	59%	65%	76%	69%	58%	69%
Inadequate KPIs and performance reporting	61	28	33	7	13	4	60	35	30	16	19	14	10	51	10	18	14	29
	58%	53%	63%	33%	76%	33%	61%	61%	63%	57%	63%	50%	59%	58%	59%	56%	74%	54%
Lack of experience in your industry	58	26	32	14	12	7	56	32	30	17	14	18	7	50	8	14	9	35
	55%	49%	62%	67%	71%	58%	57%	56%	63%	61%	47%	64%	41%	57%	47%	44%	47%	65%
Lack of standard processes	57	26	31	10	9	3	56	34	25	14	18	12	12	46	11	18	12	27
	54%	49%	60%	48%	53%	25%	57%	60%	52%	50%	60%	43%	71%	52%	65%	56%	63%	50%
Lack of innovation	56	29	27	10	12	3	56	34	28	15	16	13	11	46	10	17	11	28
	53%	55%	52%	48%	71%	25%	57%	60%	58%	54%	53%	46%	65%	52%	59%	53%	58%	52%
Limited geographical presence	44	20	24	5	10	6	42	23	24	9	12	11	11	39	5	10	10	24
	42%	38%	46%	24%	59%	50%	42%	40%	50%	32%	40%	39%	65%	44%	29%	31%	53%	44%

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9. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following disadvantages in influencing your decision?

High costs

Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	77	41	36	17	16	11	72	43	33	19	22	21	14	67	10	18	17	42
	73%	77%	69%	81%	94%	92%	73%	75%	69%	68%	73%	75%	82%	76%	59%	56%	89%	78%
Fairly important	27	12	15	4	1	1	26	14	14	9	7	7	3	20	7	13	2	12
	26%	23%	29%	19%	6%	8%	26%	25%	29%	32%	23%	25%	18%	23%	41%	41%	11%	22%
Not very important	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Not at all important	1	-	1	-	-	-	1	-	1	-	1	-	-	1	-	1	-	-
	1%	-	2%	-	-	-	1%	-	2%	-	3%	-	-	1%	-	3%	-	-
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Nets																		
Important	104	53	51	21	17	12	98	57	47	28	29	28	17	87	17	31	19	54
	99%	100%	98%	100%	100%	100%	99%	100%	98%	100%	97%	100%	100%	99%	100%	97%	100%	100%
Not important	1	-	1	-	-	-	1	-	1	-	1	-	-	1	-	1	-	-
	1%	-	2%	-	-	-	1%	-	2%	-	3%	-	-	1%	-	3%	-	-

RICS / Sodexo Global Facilities Management Survey

9. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following disadvantages in influencing your decision?

Lack of standard processes

Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	57	26	31	10	9	3	56	34	25	14	18	12	12	46	11	18	12	27
	54%	49%	60%	48%	53%	25%	57%	60%	52%	50%	60%	43%	71%	52%	65%	56%	63%	50%
Fairly important	34	19	15	4	8	8	29	17	13	10	8	11	4	28	6	7	6	21
	32%	36%	29%	19%	47%	67%	29%	30%	27%	36%	27%	39%	24%	32%	35%	22%	32%	39%
Not very important	10	7	3	6	-	1	10	3	8	4	2	3	1	10	-	3	1	6
	10%	13%	6%	29%	-	8%	10%	5%	17%	14%	7%	11%	6%	11%	-	9%	5%	11%
Not at all important	2	1	1	1	-	-	2	1	1	-	1	1	-	2	-	2	-	-
	2%	2%	2%	5%	-	-	2%	2%	2%	-	3%	4%	-	2%	-	6%	-	-
Don't know	2	-	2	-	-	-	2	2	1	-	1	1	-	2	-	2	-	-
	2%	-	4%	-	-	-	2%	4%	2%	-	3%	4%	-	2%	-	6%	-	-
Nets																		
Important	91	45	46	14	17	11	85	51	38	24	26	23	16	74	17	25	18	48
	87%	85%	88%	67%	100%	92%	86%	89%	79%	86%	87%	82%	94%	84%	100%	78%	95%	89%
Not important	12	8	4	7	-	1	12	4	9	4	3	4	1	12	-	5	1	6
	11%	15%	8%	33%	-	8%	12%	7%	19%	14%	10%	14%	6%	14%	-	16%	5%	11%

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9. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following disadvantages in influencing your decision?

Inadequate KPIs and performance reporting

Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	61	28	33	7	13	4	60	35	30	16	19	14	10	51	10	18	14	29
	58%	53%	63%	33%	76%	33%	61%	61%	63%	57%	63%	50%	59%	58%	59%	56%	74%	54%
Fairly important	32	16	16	9	4	5	29	16	14	7	9	12	4	25	7	10	4	18
	30%	30%	31%	43%	24%	42%	29%	28%	29%	25%	30%	43%	24%	28%	41%	31%	21%	33%
Not very important	10	9	1	5	-	3	8	4	4	5	1	2	2	10	-	2	1	7
	10%	17%	2%	24%	-	25%	8%	7%	8%	18%	3%	7%	12%	11%	-	6%	5%	13%
Not at all important	2	-	2	-	-	-	2	2	-	-	1	-	1	2	-	2	-	-
	2%	-	4%	-	-	-	2%	4%	-	-	3%	-	6%	2%	-	6%	-	-
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Nets																		
Important	93	44	49	16	17	9	89	51	44	23	28	26	14	76	17	28	18	47
	89%	83%	94%	76%	100%	75%	90%	89%	92%	82%	93%	93%	82%	86%	100%	88%	95%	87%
Not important	12	9	3	5	-	3	10	6	4	5	2	2	3	12	-	4	1	7
	11%	17%	6%	24%	-	25%	10%	11%	8%	18%	7%	7%	18%	14%	-	13%	5%	13%

RICS / Sodexo Global Facilities Management Survey

9. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following disadvantages in influencing your decision?

Lack of service capability

Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	105 100%	53 100%	52 100%	21 100%	17 100%	12 100%	99 100%	57 100%	48 100%	28 100%	30 100%	28 100%	17 100%	88 100%	17 100%	32 100%	19 100%	54 100%
Very important	85 81%	43 81%	42 81%	14 67%	15 88%	10 83%	81 82%	48 84%	38 79%	23 82%	23 77%	24 86%	13 76%	70 80%	15 88%	25 78%	17 89%	43 80%
Fairly important	15 14%	8 15%	7 13%	4 19%	2 12%	2 17%	13 13%	7 12%	7 15%	4 14%	4 13%	4 14%	3 18%	13 15%	2 12%	4 13%	2 11%	9 17%
Not very important	4 4%	2 4%	2 4%	3 14%	- -	- -	4 4%	1 2%	3 6%	1 4%	2 7%	- -	1 6%	4 5%	- -	2 6%	- -	2 4%
Not at all important	1 1%	- -	1 2%	- -	- -	- -	1 1%	1 2%	- -	- -	1 3%	- -	- -	1 1%	- -	1 3%	- -	- -
Don't know	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -
Nets																		
Important	100 95%	51 96%	49 94%	18 86%	17 100%	12 100%	94 95%	55 96%	45 94%	27 96%	27 90%	28 100%	16 94%	83 94%	17 100%	29 91%	19 100%	52 96%
Not important	5 5%	2 4%	3 6%	3 14%	- -	- -	5 5%	2 4%	3 6%	1 4%	3 10%	- -	1 6%	5 6%	- -	3 9%	- -	2 4%

RICS / Sodexo Global Facilities Management Survey

9. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following disadvantages in influencing your decision?

Lack of service expertise

Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	83	41	42	15	16	9	80	49	37	21	23	22	15	70	13	23	16	44
	79%	77%	81%	71%	94%	75%	81%	86%	77%	75%	77%	79%	88%	80%	76%	72%	84%	81%
Fairly important	15	9	6	3	1	2	13	5	8	6	3	4	2	11	4	5	3	7
	14%	17%	12%	14%	6%	17%	13%	9%	17%	21%	10%	14%	12%	13%	24%	16%	16%	13%
Not very important	5	3	2	3	-	1	4	1	3	1	2	2	-	5	-	2	-	3
	5%	6%	4%	14%	-	8%	4%	2%	6%	4%	7%	7%	-	6%	-	6%	-	6%
Not at all important	2	-	2	-	-	-	2	2	-	-	2	-	-	2	-	2	-	-
	2%	-	4%	-	-	-	2%	4%	-	-	7%	-	-	2%	-	6%	-	-
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Nets																		
Important	98	50	48	18	17	11	93	54	45	27	26	26	17	81	17	28	19	51
	93%	94%	92%	86%	100%	92%	94%	95%	94%	96%	87%	93%	100%	92%	100%	88%	100%	94%
Not important	7	3	4	3	-	1	6	3	3	1	4	2	-	7	-	4	-	3
	7%	6%	8%	14%	-	8%	6%	5%	6%	4%	13%	7%	-	8%	-	13%	-	6%

RICS / Sodexo Global Facilities Management Survey

9. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following disadvantages in influencing your decision?

Limited geographical presence

Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	44	20	24	5	10	6	42	23	24	9	12	11	11	39	5	10	10	24
	42%	38%	46%	24%	59%	50%	42%	40%	50%	32%	40%	39%	65%	44%	29%	31%	53%	44%
Fairly important	30	17	13	7	4	3	28	19	8	9	10	8	3	22	8	10	4	16
	29%	32%	25%	33%	24%	25%	28%	33%	17%	32%	33%	29%	18%	25%	47%	31%	21%	30%
Not very important	24	15	9	8	3	3	22	10	12	10	5	5	3	21	3	9	3	12
	23%	28%	17%	38%	18%	25%	22%	18%	25%	36%	17%	18%	18%	24%	18%	28%	16%	22%
Not at all important	5	1	4	1	-	-	5	3	2	-	3	2	-	4	1	2	2	1
	5%	2%	8%	5%	-	-	5%	5%	4%	-	10%	7%	-	5%	6%	6%	11%	2%
Don't know	2	-	2	-	-	-	2	2	2	-	-	2	-	2	-	1	-	1
	2%	-	4%	-	-	-	2%	4%	4%	-	-	7%	-	2%	-	3%	-	2%
Nets																		
Important	74	37	37	12	14	9	70	42	32	18	22	19	14	61	13	20	14	40
	70%	70%	71%	57%	82%	75%	71%	74%	67%	64%	73%	68%	82%	69%	76%	63%	74%	74%
Not important	29	16	13	9	3	3	27	13	14	10	8	7	3	25	4	11	5	13
	28%	30%	25%	43%	18%	25%	27%	23%	29%	36%	27%	25%	18%	28%	24%	34%	26%	24%

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9. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following disadvantages in influencing your decision?

Lack of innovation

Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	105 100%	53 100%	52 100%	21 100%	17 100%	12 100%	99 100%	57 100%	48 100%	28 100%	30 100%	28 100%	17 100%	88 100%	17 100%	32 100%	19 100%	54 100%
Very important	56 53%	29 55%	27 52%	10 48%	12 71%	3 25%	56 57%	34 60%	28 58%	15 54%	16 53%	13 46%	11 65%	46 52%	10 59%	17 53%	11 58%	28 52%
Fairly important	38 36%	19 36%	19 37%	7 33%	5 29%	8 67%	33 33%	15 26%	18 38%	10 36%	9 30%	13 46%	5 29%	32 36%	6 35%	11 34%	7 37%	20 37%
Not very important	7 7%	5 9%	2 4%	3 14%	- -	1 8%	6 6%	5 9%	1 2%	3 11%	2 7%	2 7%	- -	6 7%	1 6%	1 3%	1 5%	5 9%
Not at all important	4 4%	- -	4 8%	1 5%	- -	- -	4 4%	3 5%	1 2%	- -	3 10%	- -	1 6%	4 5%	- -	3 9%	- -	1 2%
Don't know	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -	- -
Nets																		
Important	94 90%	48 91%	46 88%	17 81%	17 100%	11 92%	89 90%	49 86%	46 96%	25 89%	25 83%	26 93%	16 94%	78 89%	16 94%	28 88%	18 95%	48 89%
Not important	11 10%	5 9%	6 12%	4 19%	- -	1 8%	10 10%	8 14%	2 4%	3 11%	5 17%	2 7%	1 6%	10 11%	1 6%	4 13%	1 5%	6 11%

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9. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following disadvantages in influencing your decision?

Lack of experience in your industry

Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	58	26	32	14	12	7	56	32	30	17	14	18	7	50	8	14	9	35
	55%	49%	62%	67%	71%	58%	57%	56%	63%	61%	47%	64%	41%	57%	47%	44%	47%	65%
Fairly important	26	13	13	2	2	2	24	15	9	6	6	7	7	19	7	10	5	11
	25%	25%	25%	10%	12%	17%	24%	26%	19%	21%	20%	25%	41%	22%	41%	31%	26%	20%
Not very important	17	13	4	5	2	3	15	7	8	4	8	3	2	15	2	5	5	7
	16%	25%	8%	24%	12%	25%	15%	12%	17%	14%	27%	11%	12%	17%	12%	16%	26%	13%
Not at all important	3	-	3	-	1	-	3	2	1	-	2	-	1	3	-	3	-	-
	3%	-	6%	-	6%	-	3%	4%	2%	-	7%	-	6%	3%	-	9%	-	-
Don't know	1	1	-	-	-	-	1	1	-	1	-	-	-	1	-	-	-	1
	1%	2%	-	-	-	-	1%	2%	-	4%	-	-	-	1%	-	-	-	2%
Nets																		
Important	84	39	45	16	14	9	80	47	39	23	20	25	14	69	15	24	14	46
	80%	74%	87%	76%	82%	75%	81%	82%	81%	82%	67%	89%	82%	78%	88%	75%	74%	85%
Not important	20	13	7	5	3	3	18	9	9	4	10	3	3	18	2	8	5	7
	19%	25%	13%	24%	18%	25%	18%	16%	19%	14%	33%	11%	18%	20%	12%	25%	26%	13%

RICS / Sodexo Global Facilities Management Survey

9. When (if you were) considering integrated or bundled outsourcing, how important, if at all, are each of the following disadvantages in influencing your decision?

Poor cultural fit with your organisation

Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integrated / bundled	Non-integrated / bundled	Site-based	National	Regional	Global	Europe	Rest of world	Corporate	Industrial	Other
Total	105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Very important	70	28	42	11	14	10	65	38	34	19	19	20	10	57	13	22	11	37
	67%	53%	81%	52%	82%	83%	66%	67%	71%	68%	63%	71%	59%	65%	76%	69%	58%	69%
Fairly important	26	21	5	8	2	2	25	15	9	8	5	7	6	22	4	7	6	13
	25%	40%	10%	38%	12%	17%	25%	26%	19%	29%	17%	25%	35%	25%	24%	22%	32%	24%
Not very important	7	4	3	2	1	-	7	3	4	1	4	1	1	7	-	1	2	4
	7%	8%	6%	10%	6%	-	7%	5%	8%	4%	13%	4%	6%	8%	-	3%	11%	7%
Not at all important	2	-	2	-	-	-	2	1	1	-	2	-	-	2	-	2	-	-
	2%	-	4%	-	-	-	2%	2%	2%	-	7%	-	-	2%	-	6%	-	-
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Nets																		
Important	96	49	47	19	16	12	90	53	43	27	24	27	16	79	17	29	17	50
	91%	92%	90%	90%	94%	100%	91%	93%	90%	96%	80%	96%	94%	90%	100%	91%	89%	93%
Not important	9	4	5	2	1	-	9	4	5	1	6	1	1	9	-	3	2	4
	9%	8%	10%	10%	6%	-	9%	7%	10%	4%	20%	4%	6%	10%	-	9%	11%	7%

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10. That's very nearly the end of all the questions I wanted to ask you today - thank you so much for your time so far. My final question is about property measurement.

An international standard of property measurement would provide a unified standard as to how the area of a property is measured, for example, whether lift shafts or corridors are included in the total area. To what extent do you agree or disagree that your business would benefit from this?

Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integrated / bundled	Non-integrated / bundled	Site-based	National	Regional	Global	Europe	Rest of world	Corporate	Industrial	Other
Total	105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Strongly agree	43	19	24	8	6	5	40	25	15	10	13	11	8	38	5	16	6	21
	41%	36%	46%	38%	35%	42%	40%	44%	31%	36%	43%	39%	47%	43%	29%	50%	32%	39%
Tend to agree	50	27	23	11	7	7	47	25	27	14	13	15	7	42	8	14	10	26
	48%	51%	44%	52%	41%	58%	47%	44%	56%	50%	43%	54%	41%	48%	47%	44%	53%	48%
Tend to disagree	9	4	5	2	2	-	9	6	4	3	2	2	2	6	3	2	1	6
	9%	8%	10%	10%	12%	-	9%	11%	8%	11%	7%	7%	12%	7%	18%	6%	5%	11%
Strongly disagree	3	3	-	-	2	-	3	1	2	1	2	-	-	2	1	-	2	1
	3%	6%	-	-	12%	-	3%	2%	4%	4%	7%	-	-	2%	6%	-	11%	2%
Don't know	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Nets																		
Agree	93	46	47	19	13	12	87	50	42	24	26	26	15	80	13	30	16	47
	89%	87%	90%	90%	76%	100%	88%	88%	88%	86%	87%	93%	88%	91%	76%	94%	84%	87%
Disagree	12	7	5	2	4	-	12	7	6	4	4	2	2	8	4	2	3	7
	11%	13%	10%	10%	24%	-	12%	12%	13%	14%	13%	7%	12%	9%	24%	6%	16%	13%

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D1. How many people does your organisation employ?

Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integrated / bundled	Non-integrated / bundled	Site-based	National	Regional	Global	Europe	Rest of world	Corporate	Industrial	Other
Total	105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
0-49	11	11	-	4	-	2	10	3	7	5	2	4	-	10	1	4	1	6
	10%	21%	-	19%	-	17%	10%	5%	15%	18%	7%	14%	-	11%	6%	13%	5%	11%
50-249	10	10	-	4	-	2	8	5	3	3	3	3	1	9	1	1	1	8
	10%	19%	-	19%	-	17%	8%	9%	6%	11%	10%	11%	6%	10%	6%	3%	5%	15%
250-999	12	12	-	4	1	2	12	7	6	5	2	3	1	10	2	2	2	8
	11%	23%	-	19%	6%	17%	12%	12%	13%	18%	7%	11%	6%	11%	12%	6%	11%	15%
1000-4999	20	20	-	3	3	2	20	11	9	6	6	6	2	15	5	5	4	11
	19%	38%	-	14%	18%	17%	20%	19%	19%	21%	20%	21%	12%	17%	29%	16%	21%	20%
5000 or more	52	-	52	6	13	4	49	31	23	9	17	12	13	44	8	20	11	21
	50%	-	100%	29%	76%	33%	49%	54%	48%	32%	57%	43%	76%	50%	47%	63%	58%	39%
Net: Under 5000	53	53	-	15	4	8	50	26	25	19	13	16	4	44	9	12	8	33
	50%	100%	-	71%	24%	67%	51%	46%	52%	68%	43%	57%	24%	50%	53%	38%	42%	61%

RICS / Sodexo Global Facilities Management Survey

D2. What is the approximate turnover of your organisation?

Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integrated / bundled	Non-integrated / bundled	Site-based	National	Regional	Global	Europe	Rest of world	Corporate	Industrial	Other
Total	105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Under £100m	11	9	2	11	-	1	11	4	7	4	2	4	1	9	2	3	1	7
	10%	17%	4%	52%	-	8%	11%	7%	15%	14%	7%	14%	6%	10%	12%	9%	5%	13%
£100 - 999m	10	6	4	10	-	1	10	5	5	1	1	5	3	10	-	3	1	6
	10%	11%	8%	48%	-	8%	10%	9%	10%	4%	3%	18%	18%	11%	-	9%	5%	11%
£1000 - 9999m	10	4	6	-	10	2	9	7	4	1	5	2	2	7	3	2	2	6
	10%	8%	12%	-	59%	17%	9%	12%	8%	4%	17%	7%	12%	8%	18%	6%	11%	11%
£10,000m+	7	-	7	-	7	-	7	2	5	-	2	3	2	6	1	3	2	2
	7%	-	13%	-	41%	-	7%	4%	10%	-	7%	11%	12%	7%	6%	9%	11%	4%
Not Stated	67	34	33	-	-	8	62	39	27	22	20	14	9	56	11	21	13	33
	64%	64%	63%	-	-	67%	63%	68%	56%	79%	67%	50%	53%	64%	65%	66%	68%	61%
Nets																		
Under £1000m	21	15	6	21	-	2	21	9	12	5	3	9	4	19	2	6	2	13
	20%	28%	12%	100%	-	17%	21%	16%	25%	18%	10%	32%	24%	22%	12%	19%	11%	24%
£1,000m+	17	4	13	-	17	2	16	9	9	1	7	5	4	13	4	5	4	8
	16%	8%	25%	-	100%	17%	16%	16%	19%	4%	23%	18%	24%	15%	24%	16%	21%	15%
Mean Score	19124	570.4	37678	178.50	42528.0	939.5	19606	3940	31882	786.9	26137	30110	4886	10410	65600	56593	7255	2889

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D3. What industry sector do you work in?
Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integrated / bundled	Non-integrated / bundled	Site-based	National	Regional	Global	Europe	Rest of world	Corporate	Industrial	Other
Total	105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Corporate (including finance, IT, professional services)	32	12	20	6	5	1	31	16	16	5	10	7	9	25	7	32	-	-
	30%	23%	38%	29%	29%	8%	31%	28%	33%	18%	33%	25%	53%	28%	41%	100%	-	-
Manufacturing	6	2	4	1	-	1	6	3	3	4	-	1	1	4	2	-	6	-
	6%	4%	8%	5%	-	8%	6%	5%	6%	14%	-	4%	6%	5%	12%	-	32%	-
Defence	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Healthcare (including social work)	8	3	5	3	1	1	8	5	3	3	1	4	-	5	3	-	-	8
	8%	6%	10%	14%	6%	8%	8%	9%	6%	11%	3%	14%	-	6%	18%	-	-	15%
Justice services	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Education	6	6	-	-	-	1	5	2	3	3	-	3	-	6	-	-	-	6
	6%	11%	-	-	-	8%	5%	4%	6%	11%	-	11%	-	7%	-	-	-	11%
Sports and leisure (including arts, entertainment and recreation)	3	2	1	-	1	2	2	1	1	2	-	-	1	3	-	-	-	3
	3%	4%	2%	-	6%	17%	2%	2%	2%	7%	-	-	6%	3%	-	-	-	6%
Remote sites (oil and gas, mining)	5	3	2	1	-	-	5	3	2	4	-	1	-	4	1	-	5	-
	5%	6%	4%	5%	-	-	5%	5%	4%	14%	-	4%	-	5%	6%	-	26%	-
Real estate	10	9	1	4	1	2	10	4	7	3	4	3	-	9	1	-	-	10
	10%	17%	2%	19%	6%	17%	10%	7%	15%	11%	13%	11%	-	10%	6%	-	-	19%
Utilities (including electricity, gas, steam and air conditioning supply)	4	2	2	-	2	-	4	2	2	-	2	2	-	3	1	-	4	-
	4%	4%	4%	-	12%	-	4%	4%	4%	-	7%	7%	-	3%	6%	-	21%	-
Wholesale and retail (including repair)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Transport and logistics (including storage)	4	1	3	-	2	-	4	2	3	-	3	1	-	4	-	-	4	-
	4%	2%	6%	-	12%	-	4%	4%	6%	-	10%	4%	-	5%	-	-	21%	-

RICS / Sodexo Global Facilities Management Survey

D3. What industry sector do you work in?

Base: All respondents

		Size		Turnover		Current outsourcing strategy				Current FM grouping strategy				Country		Sector		
	Total	Under 5000	5000 or more	Under £1000m	£1,000m+	All in-house	Out-sourcing	Integ rated / bundled	Non-integ rated / bundled	Site-based	Nat ional	Reg ional	Glo bal	Eur ope	Rest of world	Corp orate	Indus trial	Other
Total	105	53	52	21	17	12	99	57	48	28	30	28	17	88	17	32	19	54
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Other	27	13	14	6	5	4	24	19	8	4	10	6	6	25	2	-	-	27
	26%	25%	27%	29%	29%	33%	24%	33%	17%	14%	33%	21%	35%	28%	12%	-	-	50%
Nets																		
Corporate	32	12	20	6	5	1	31	16	16	5	10	7	9	25	7	32	-	-
	30%	23%	38%	29%	29%	8%	31%	28%	33%	18%	33%	25%	53%	28%	41%	100%	-	-
Industrial	19	8	11	2	4	1	19	10	10	8	5	5	1	15	4	-	19	-
	18%	15%	21%	10%	24%	8%	19%	18%	21%	29%	17%	18%	6%	17%	24%	-	100%	-
Other	54	33	21	13	8	10	49	31	22	15	15	16	7	48	6	-	-	54
	51%	62%	40%	62%	47%	83%	49%	54%	46%	54%	50%	57%	41%	55%	35%	-	-	100%