

MEMBERSHIP



# Survey of the Profession

Highlights

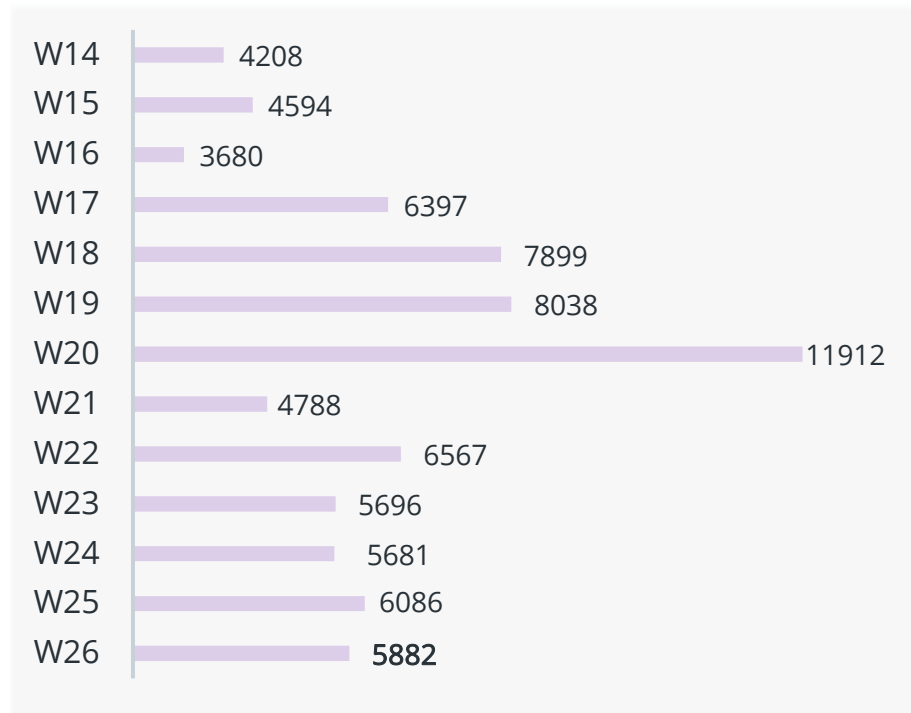
November 2024

## Survey of the Profession results 2024

- Biannual: surveys held in June and November 2024
- Provides an insight into our performance against our KPIs
- Temperature gauge from our membership globally

# Response rates

## Over time



## November/December 2024

Region	Contacts provided	Responses received	Response rate
Americas	3,388	188	5.7%
Asia Pacific	20,391	837	4.2%
Europe	9,399	646	7.0%
Middle East and Africa	8,418	579	7.5%
UK & Ireland	98,253	3,623	3.7%
<b>Total</b>	<b>139,849</b>	<b>5,882</b>	<b>4.3%</b>

The response rate is slightly higher than the previous wave (4.1%). There are only small variations in response rate by region. Where movement has occurred, this is still in line with past wave results.

# Demographics

## Gender

20% Female

77% Male

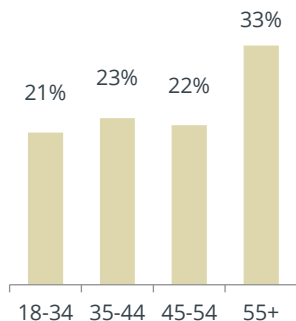
3% PNTS\*

## Membership length

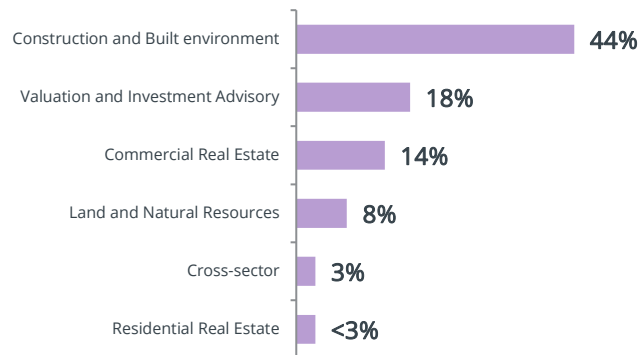
Years

<1	1-3	4-5	6-9	10-19	20+	PNTS*
11%	14%	8%	12%	18%	34%	2%

## Age



## Professional sphere



## Public/private sector



Private Sector  
75%



Public Sector  
21%

Numbers do not add to 100% due to PNTS\* option

## Private sector organisation size

30% **Very large organisation** (>1000 employees)

12% **Large organisation** (250-999 employees)

16% **Medium organisation** (50-249 employees)

15% **Small organisation** (10-49 employees)

18% **Very small organisation** (2-9 employees)

9% **Sole trader**

# Executive Summary

## KPI scores show positive signs for 2024

All KPI scores have increased since the previous wave, following a levelling off in 2023. This wave we recorded:

- NET satisfaction is 54% (up 2pp).
- The average 'trust' score is 68% (up 2pp)
- The average 'influence' score is 59% (up 1pp).

These scores represent the strongest position in the last five years.

NET satisfaction is up in most regions, remaining lowest in the UK & Ireland (45%), the same as the last wave and highest in the MEA (78%).

## Advocacy remained stable

### **'Very likely' to recommend joining profession**

- The proportion who are likely or 'very likely' to recommend joining the profession has continued to increase consistently since November 2021 (68% with 38% very likely to recommend (up 1pp)

### **Advocacy (speak highly – speak critically)**

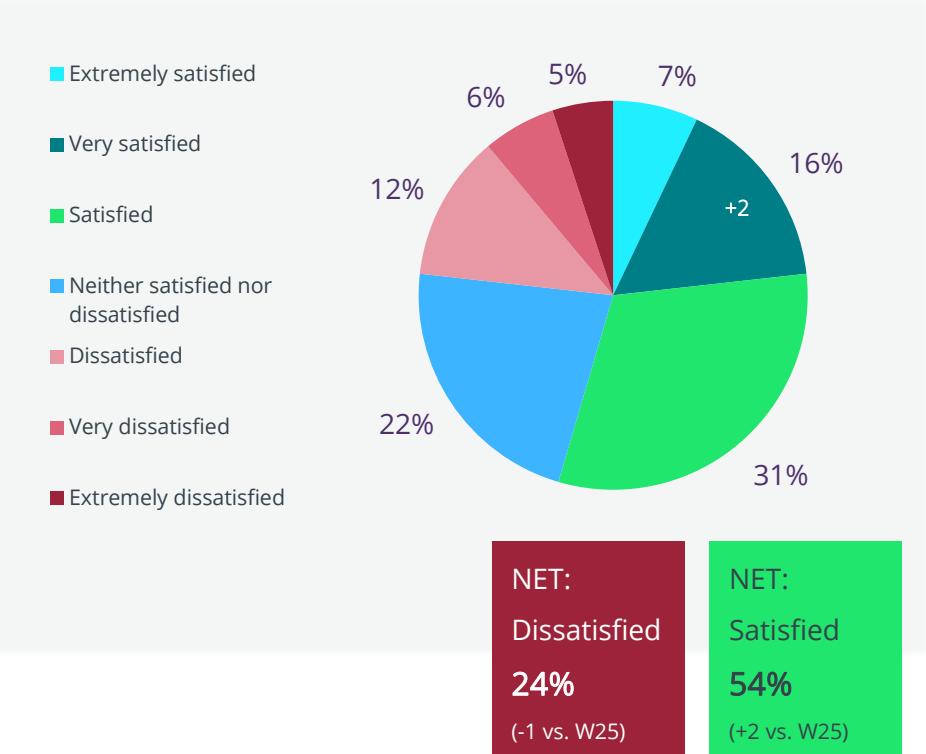
- The overall advocacy score is +39 this wave, up 3pp on the previous wave.
- Increases in advocacy in MEA (+2pp), in the Americas (+8pp) and Europe (+2pp) are offsetting reductions in APAC (-5pp).

## Engagement with RICS has increased

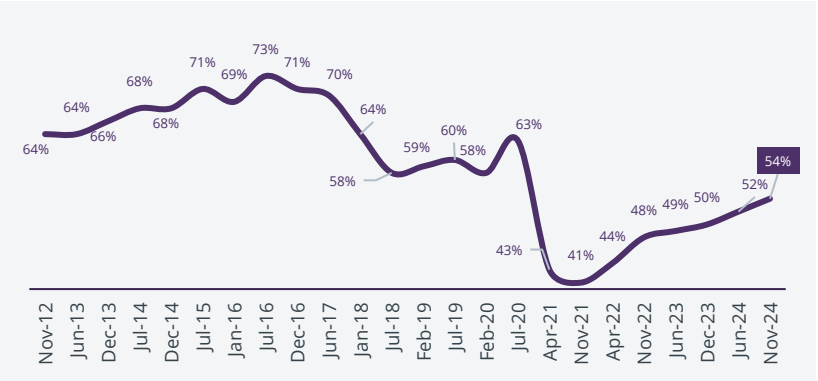
- All aspects of RICS membership are important to most members, but provision of regulation and standards, together with status, are the most important aspects.
- Members in the UK & Ireland continue to have lower positive associations with the RICS brand.
- When opened out for members to use their own words they were split between positive and negative sentiments.
- The positive perceptions of RICS are driven by its upholding of professional standards and international reputation.
- More negative sentiments are driven by the cost of membership in comparison to other organisations and the relevance of RICS (and the services it provides) to its members.
- SMEs and sole traders continue to feel that RICS does not engage or represent them

# Satisfaction

## Overall satisfaction with RICS membership



## NET: Satisfied with RICS – over time

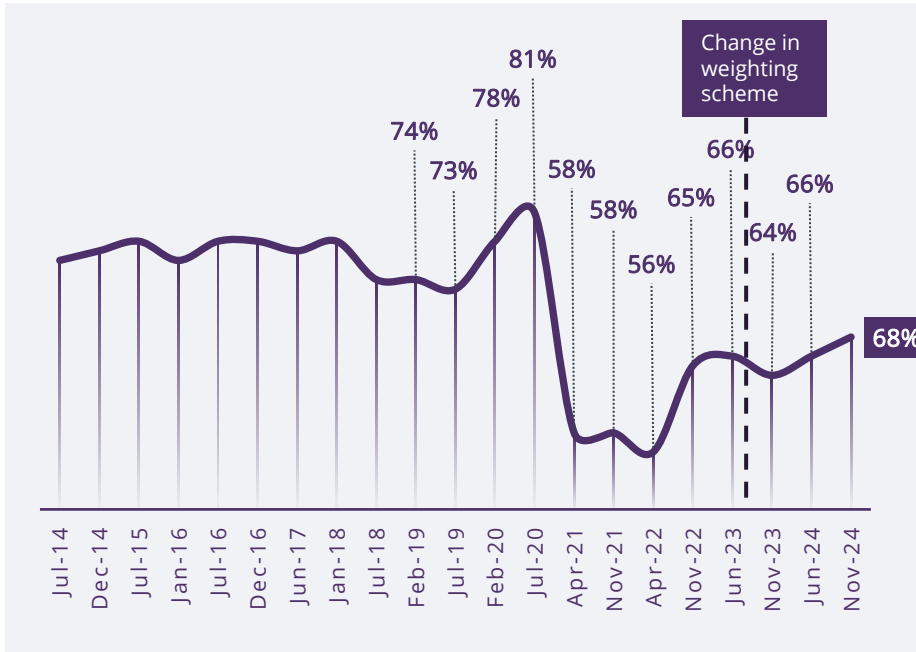


## Comparative figures in different markets from last wave

UK&I	46%	(+1)	MEA	74%	(-4)
Americas	61%	(-9)	Europe	56%	(+1)
Asia Pacific	71%	(-3)			

# Trusted by our stakeholders and society

Average trust score - overtime



## Measured against six statements

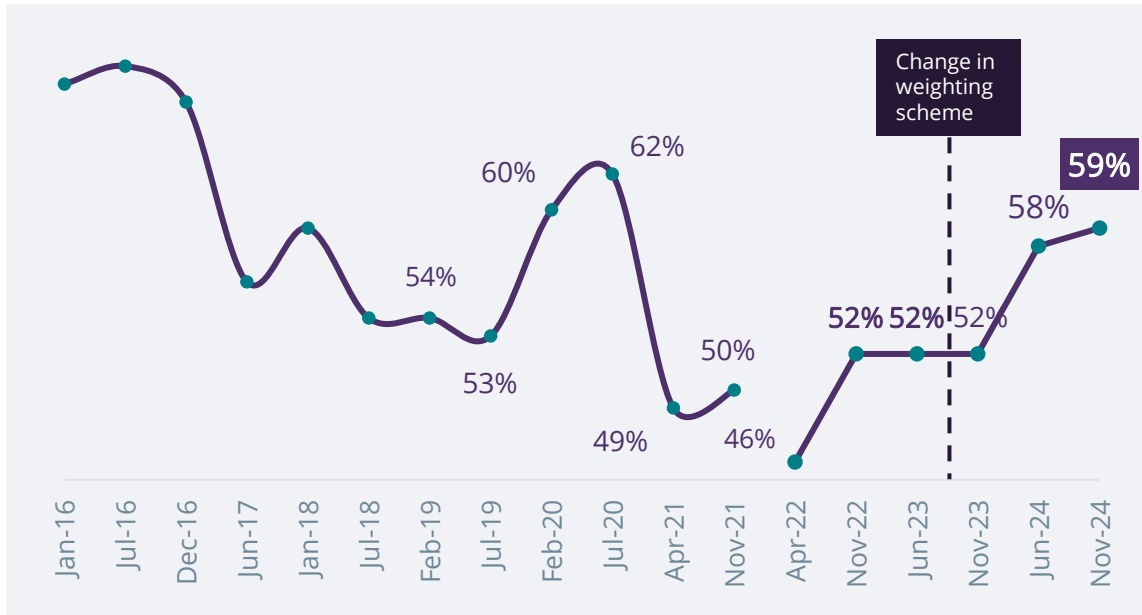
1	RICS effectively regulates the profession to maintain and improve professionalism	77% (+2)
2	RICS effectively regulates the profession to maintain public trust	73% (+3)
3	RICS increases the status and recognition of the profession and its standards by governments and markets	68% (+1)
4	Maintaining professional qualifications and standards in the surveying profession	70% (+2)
5	Providing assurance that standards are being met	60% (+2)
6	Supporting professional development by providing guidance and support	61% (+2)

Overall Trust score for this wave is 68% up 2pp from last wave

# Influential thought leader

## Average Influence Score - overtime

Average score is calculated as an average of the proportion who rate RICS 7-10 out of 10 or agrees with the statement across the 8 metrics. Please see the appendix for a breakdown of how the metrics have changed since July 2020.



Measured against 8 statements:

RICS shows leading thinking through:		
1	Economics and market analysis	70% (+2)
2	Research and insights	67% (+1)
A thought leader on:		
3	Issues of sustainability	70% (+2)
4	D & I	57% (-1)
5	Data and Technology	55% (+2)
6	Giving expert advice for Governments, NGOs and other decision makers	49% (+2)
7	Ensuring the profession is recognized and standards adopted	60% (+1)
8	Influencing public policy	43% (+1)

Overall influence this wave 59% (+1)

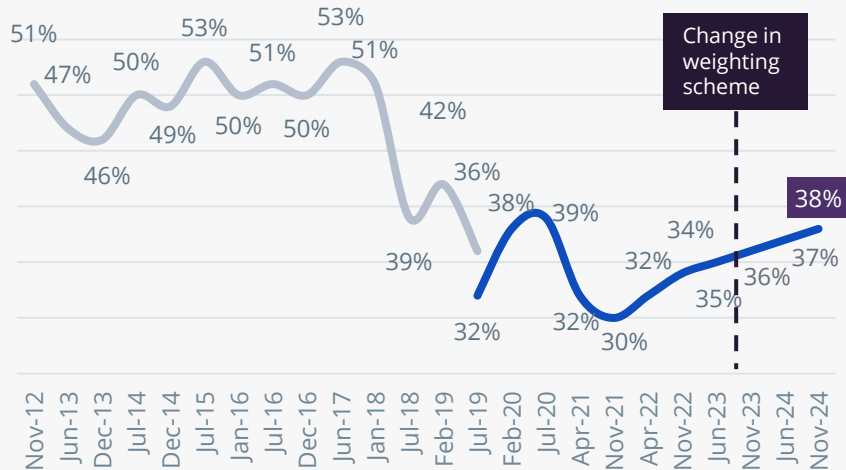


# Advocacy

Advocacy is measured by two elements:

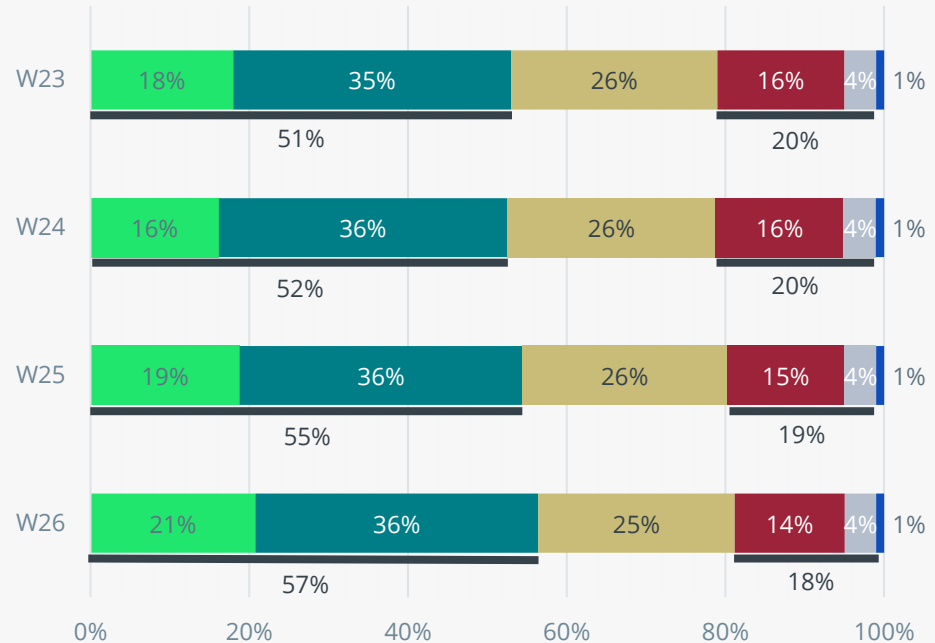
- 1 Recommendation to join the profession has increased by 1pp to 38% ('very likely')

— I am likely to recommend joining RICS to another professional  
 — I am likely to recommend joining this profession to another professional

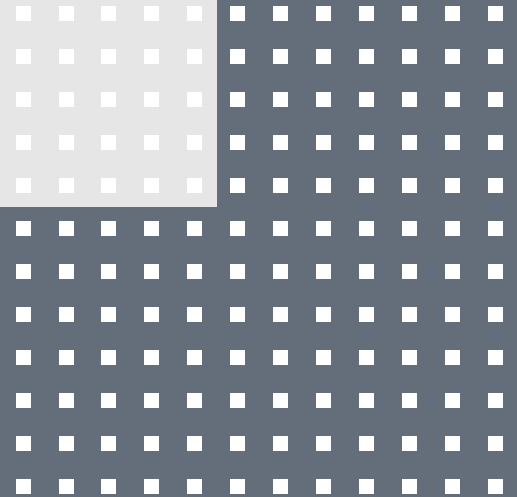
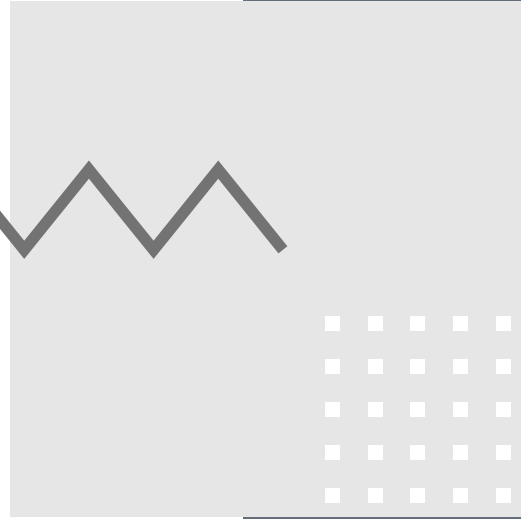


- 2 How would they speak about RICS has increased by 3pp to 39%

■ Speak highly without being asked   ■ Speak highly if asked  
 ■ Would be neutral   ■ Speak critically if asked  
 ■ Speak critically without being asked   ■ Don't know



# Regional summaries



Regional summary:

# Americas

**72%** Average trust score

**60%** Average influence score

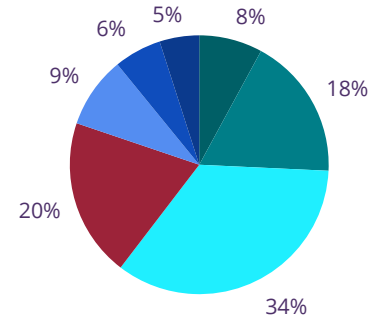
**73%** Likely to recommend joining the profession

**+59** Advocacy score  
(% who would speak highly less % who would speak critically)

Sample size: 188

## Overall satisfaction with RICS membership

- Extremely satisfied
- Very satisfied
- Satisfied
- Neither satisfied nor dissatisfied
- Dissatisfied
- Very dissatisfied
- Extremely dissatisfied



NET:  
Satisfied  
**61%**  
(-9vs. W25)

NET:  
Dissatisfied  
**19%**  
(+2 vs. W25)

## Transparency of RICS in each of the following



Regional summary:

# UK & Ireland

**63%** Average trust score

**53%** Average influence score

**65%** Likely to recommend joining the profession

**+26** Advocacy score  
(% who would speak highly less % who would speak critically)

Sample size: 3623

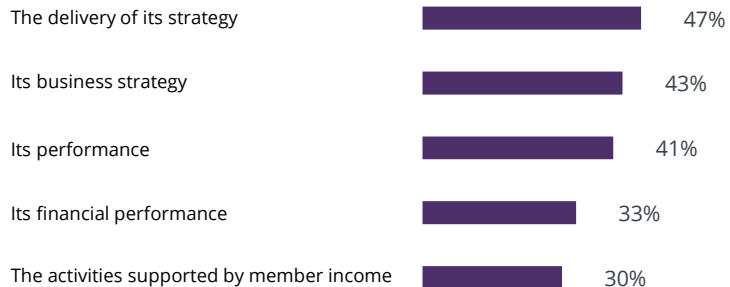
## Overall satisfaction with RICS membership



NET:  
Satisfied  
**46%**  
(+1 vs. W25)


NET:  
Dissatisfied  
**29%**  
(= W25)

## Transparency of RICS in each of the following



# KPI summary: UK & Ireland sub-regions

	% NET: Satisfied	Average Trust score	Average Influence score	Advocacy score (Speak highly – speak critically)
Ireland	71%	83%	73%	+69
East Midlands	50%	62%	54%	+26
South East	46%	63%	52%	+28
South West	40%	63%	51%	+23
Wales	46%	64%	52%	+20
London	47%	61%	51%	+26
East	45%	63%	54%	+26
Yorkshire & Humber	45%	60%	54%	+26
Scotland	43%	63%	51%	+10
West Midlands	44%	63%	52%	+23
North West	45%	63%	54%	+30
Northern Ireland	47%	67%	61%	+21
North East	48%	64%	55%	+26


  
 Green and red shading indicates the regions which scored the top 3 and bottom 3 in each KPI

Sample size: 3623; Ireland (128), East Midlands (228), South East (635), South West (354), Wales (111), London (746), East (295), Yorkshire & Humber (225), Scotland (222), West Midlands (261), North West (262), Northern Ireland (48), North East (101)

Regional summary:

# Europe

**71%** Average trust score

**56%** Average influence score

**71%** Likely to recommend joining the profession

**+57** Advocacy score  
(% who would speak highly less % who would speak critically)

Sample size: 646

## Overall satisfaction with RICS membership



NET:  
Satisfied  
**56%**  
(+1 vs. W25)

NET:  
Dissatisfied  
**24%**  
(+2 vs. W25)

## Transparency of RICS in each of the following



Regional summary:

# Middle East & Africa

**87%** Average trust score

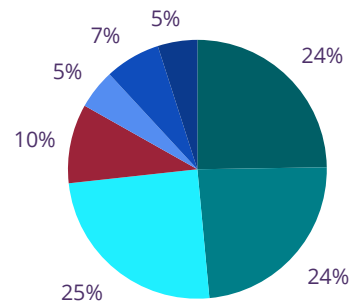
**81%** Average influence score

**88%** Likely to recommend joining the profession

**+78** Advocacy score  
(% who would speak highly less % who would speak critically)

Sample size: 579

## Overall satisfaction with RICS membership



NET:  
Satisfied  
**74%**  
(-4 vs. W25)

NET:  
Dissatisfied  
**16%**  
(+6 vs. W25)

## Transparency of RICS in each of the following



Regional summary:

# Asia Pacific

**70%** Average trust score

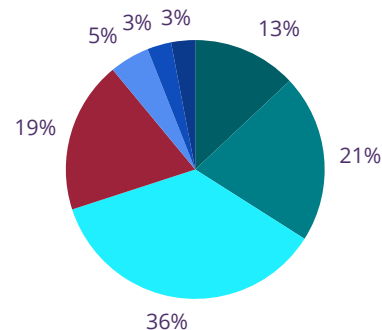
**73%** Average influence score

**79%** Likely to recommend joining the profession

**+63** Advocacy score  
(% who would speak highly less % who would speak critically)

Sample size: 837

## Overall satisfaction with RICS membership



NET:  
Satisfied  
**71%**  
(-3 vs. W25)

NET:  
Dissatisfied  
**11%**  
(= vs. W25)

## Transparency of RICS in each of the following







Thank you.

# Changes to weighting in wave 24

In previous waves of the research, data was weighted to be representative of members by region and member grade.

In 2023 the decision was made to weight data by region and member grade, and additionally by age and gender.

The impact of the previous change in weighting on the KPIs was small. However, this approach should provide a more accurate picture of the profession going forward.

Age	% of respondents	% after weighting
18-34	10%	23%
35-44	19%	24%
45-54	26%	22%
55+	44%	30%

\*PNTS = 'prefer not to say'

Member grade	% of respondents	% after weighting
APC Candidate	13%	19%
Associate Candidate	1%	1%
Associate Member	5%	5%
Fellow	14%	10%
Professional Member	66%	65%

Numbers do not add to 100% due to PNTS\* option and some missing data

Region	% of respondents	% after weighting
Americas	4%	2%
Asia Pacific	16%	15%
Europe	13%	7%
Middle East and Africa	10%	6%
UK & Ireland	57%	70%