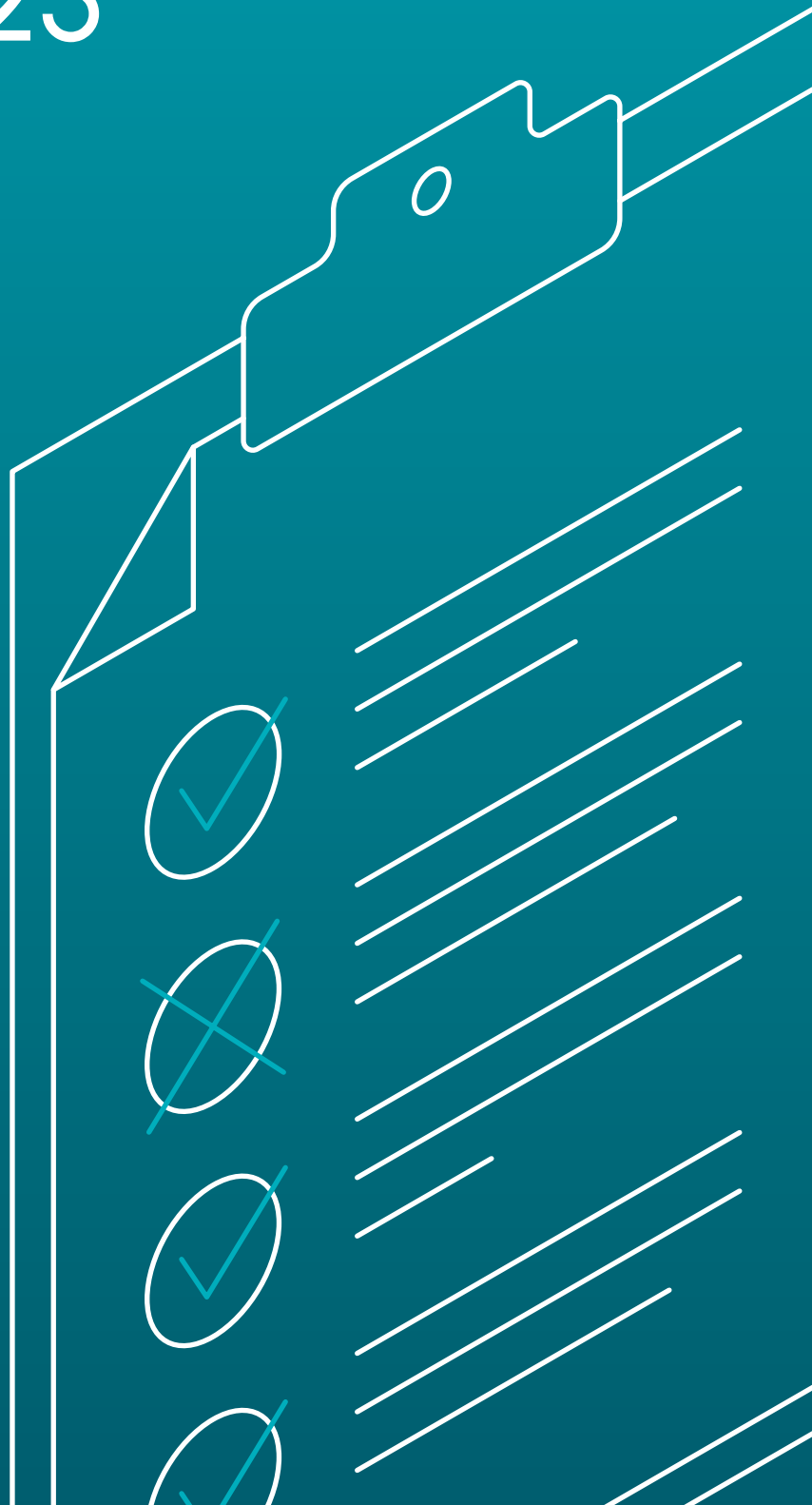


The State of Facilities Management Report 2025

SFG20

DRIVING FACILITIES EXCELLENCE



Foreword

Facilities Management is often an unsung hero in the built environment. It operates behind the scenes, ensuring that the spaces where we live, work, and gather are safe, efficient, and sustainable. Yet, as our industry faces increasing regulatory scrutiny, financial pressures, and the urgent demand for digital transformation, the role of FM has never been more critical.

The past year has shown that while there is an undeniable commitment to raising standards across the industry, the road to compliance, cost efficiency, and sustainability remains a tough one to navigate. Conversations with FM professionals across different sectors highlight the same recurring theme: progress is being made, but not at the speed or scale needed to meet the growing challenges ahead.

I see three key realities shaping the future of FM. First, compliance is no longer an aspiration, it's an obligation. The introduction of the Building Safety Regulator has made it clear that scrutiny on accountability will only continue to increase. Organisations that fail to prioritise compliance, not just in principle but in execution, will find themselves exposed to serious risks, both financial and reputational. Compliance is not a tick-box exercise – it is the foundation of safe and resilient buildings.

Second, FM has to become more data driven. The days of reactive maintenance are numbered, and those who continue to rely on outdated practices will struggle to keep pace. Facilities Managers need access to real time asset data, not only to meet compliance demands but also to optimise maintenance strategies, improve efficiency, and unlock cost savings. Yet, many organisations still lack the digital infrastructure to make this a reality. This needs to change.

Finally, the FM industry cannot afford to take a passive approach to net zero. There is a clear desire to integrate sustainability into FM strategies, but without clear investment, accountability, and measurement, it risks becoming an ambition rather than an outcome. Carbon reduction targets need to be linked to real, actionable steps that work in harmony with compliance and cost management, rather than competing against them.

What is clear is that the FM industry is at a crossroads. Those who embrace a strategic, data led approach, where compliance, technology, and sustainability work together, will be the ones who thrive in an era of increasing scrutiny and digital transformation.

At SFG20, we remain committed to supporting the industry through these changes. Whether through our new AI driven asset mapping, or compliance solutions, we aim to empower FM teams to futureproof their operations.

Finally, I want to extend my sincere thanks to everyone who participated in this survey. Your insights are invaluable in shaping the future of the industry. This report is more than just a collection of statistics, it is a roadmap to navigating the evolving landscape of FM.

“ Let's move forward together, ensuring that FM remains at the forefront of safe, sustainable, and efficient building management.



Kirsty Cogan,
Managing Director,
SFG20

Contents

Explore the top FM
industry trends

06	The current state of Facilities Management
12	Top challenges in Facilities Management
18	A level of compliance confidence
26	The Desperate Need to Reduce Operational Costs
34	Slow Technology adoption in FM
42	The race to net zero: moving slowly
52	A huge problem for FM: built asset registers
60	Top trends & predictions for the FM industry
66	Methodology & data collection



The current state of Facilities Management

People spend 90% of their lifetime in buildings, yet buildings are rarely at the forefront of the mind both in business and life. That is, until you are working in facilities management.

Protecting life by keeping occupants safe, and preserving property is what it's all about. But it can be easy to lose sight of the bigger picture when you are fighting with other business areas for budget, trying to persuade stakeholders to prioritise building maintenance and trying to win maintenance contracts. It becomes about the day to day and a race to the bottom rather than the wider aim of the industry.

Buildings only tend to get widespread attention when it is seriously impacted or lost. Psychologically, buildings only fulfil a 'basic' need. They quickly become de-prioritised in the greater scheme of things when it comes to allocation of resources.

Things are starting to shift. The lack of focus on decisions outside of cost or recognition of the true impact on occupants and the wider planet has led to some tragic and preventable consequences.

The response has been legislation change and the introduction of the Building Safety Regulator to force change within the industry. The FM industry will come under greater scrutiny as the industry shifts towards higher standards of compliance, safety and sustainability. Building a culture of compliance should be front of mind for all facilities professionals. There is nowhere to hide – you are either compliant or you are not, and this comes with sanctions.

The needed cultural shift plus advances in technology and the race to net zero carbon, has created a level of optimism in the industry that currently feels time poor and under-resourced. In the year ahead, leveraging technology to advance maintenance practices, and create greater value through a more productive use of resource is a priority. The hope is that this creation of value through improved productivity and reduction in scarce resources will demonstrate the strategic importance of maintaining assets properly, to ensure buildings are preserved, and occupants' safety is maintained.

To explore the current trends, insights, and opportunities in the FM industry, we conducted an industry wide survey from a broad range of sectors and spoke to experts on each of the key themes that came from the data.

The SFG20 State of FM survey results reveal a sector under increasing pressure to balance compliance, cost efficiency, and sustainability, all while navigating rapid advances in technology. Compliance and safety remain the top priority for facilities management professionals—unsurprising given tightening regulations and growing scrutiny of building operations. However, many organisations report challenges in achieving and maintaining compliance, often due to incomplete asset data, outdated systems, or a lack of clear ownership over maintenance responsibilities.

At the same time, the imperative to reduce operational costs continues to shape decision-making. With budgets under strain, organisations are seeking smarter, data-driven approaches to maintenance and asset management. The adoption of technology, including AI-driven asset mapping, predictive maintenance, and automated compliance tracking, is accelerating, yet implementation remains inconsistent across the sector.



Sustainability and the drive towards net zero carbon are now fundamental considerations rather than optional ambitions. From energy efficiency initiatives to whole life asset management, organisations are increasingly expected to integrate sustainable practices into their operations. However, achieving meaningful progress requires not only investment but also the right infrastructure, skills, and regulatory alignment. Having said this, there is not yet a sense of urgency for organisations to drive the necessary change that will help have a positive impact on climate change. The positive impacts for organisations beyond carbon reduction need to be seen for the FM industry to truly adopt a net zero approach.

Underpinning all these challenges is asset management, the foundation for effective, compliant, and cost-efficient facilities. Yet the survey highlights persistent gaps in data quality, asset register completeness, and the ability to link maintenance strategies to long term asset performance. Without a structured, digital first approach to asset management, organisations will struggle to meet both regulatory and financial demands in the years ahead.

As the sector moves forward, those who embrace a proactive, technology-enabled approach to compliance, cost reduction, sustainability, and asset optimisation will be best positioned for success. The insights from this report provide a critical snapshot of industry priorities and the challenges that must be addressed to futureproof facilities management.

The data collected shows that:

- **Improving compliance and safety** is the top priority in 2025
- **High costs** remain the biggest barrier to adopting new technology and implementing sustainability measures
- **Budget constraint** is the most pressing challenge faced by the industry, and reducing operational costs is the second highest priority within the FM industry.
- Concerns exist on the **skills shortage** across carbon reduction, technology and hard FM skills required to carry out maintenance.
- **Digital transformation** is a popular option to improve compliance while reducing cost
- The top investment priority over the next 3 years is in **asset management and maintenance**

The report will dive into the detail of these findings – lets jump right in.

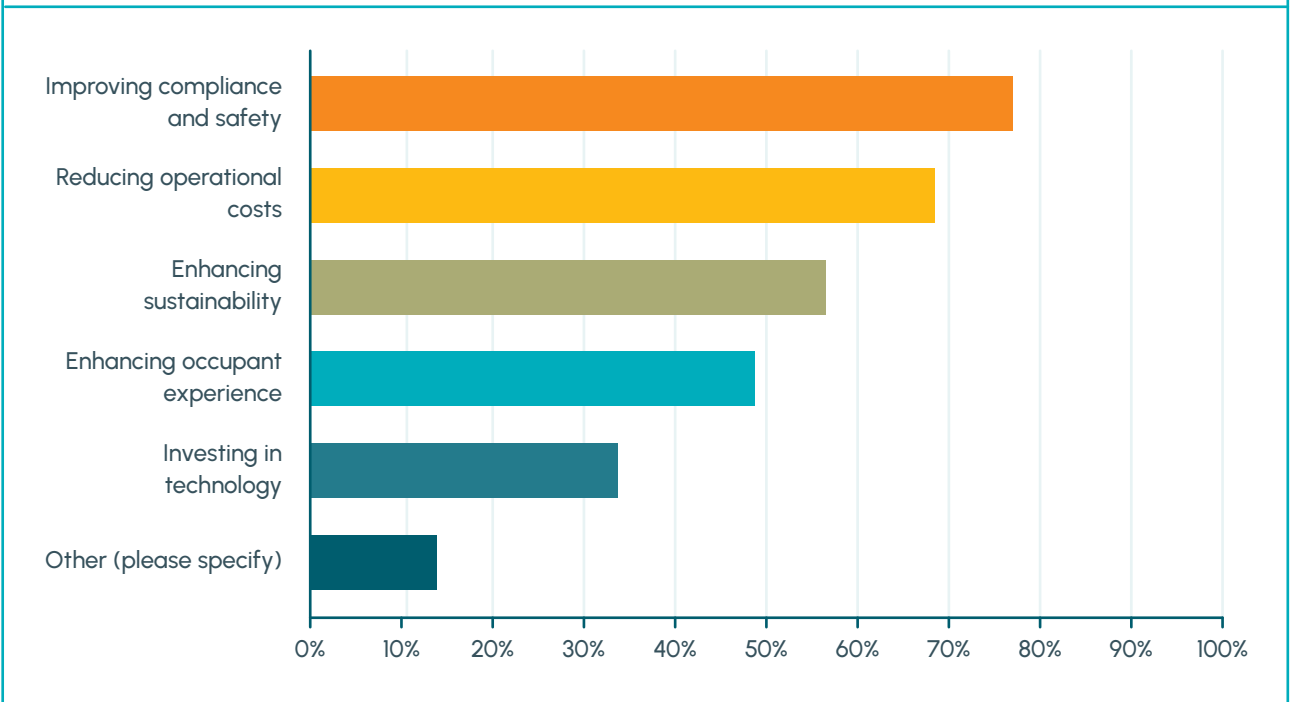
Top Priorities for 2025

Survey respondents were asked to select their top priorities for the next year.

The data showed that:

- **Improving compliance and safety** emerged as the top priority, reflecting growing concerns around achieving compliance and reducing risk driven by increased legislation and the introduction of the Building Safety Regulator.
- **Reducing operational costs** ranked second, highlighting financial pressures faced by FM teams.
- **Enhancing occupant experience** was selected by a large proportion of respondents, especially in the commercial real estate and hospitality sectors.
- **Introducing sustainability measures** has become a high priority, aligning with broader industry efforts toward achieving net zero carbon goals.
- **Investing in technology**, while ranking lower than other priorities, still features as a key focus for many organisations.

What are your top priorities for 2025? (Select all that apply)



There are many new regulations to stay up to date with and this has placed additional demands on FM teams to ensure they can achieve building maintenance compliance. This is quickly followed by reducing operational costs. The paradox is how organisations can improve compliance and safety while reducing the costs of maintenance.

Survey respondents were asked to identify the biggest opportunities in the sector, and technology and use of digital is seen as the route to achieving both compliance and reducing costs. This must come with an initial capital investment to obtain the right technology, which may be a challenge with budget constraints a key theme in the data. Cost reduction is particularly a focus among respondents working in healthcare and the public sector.

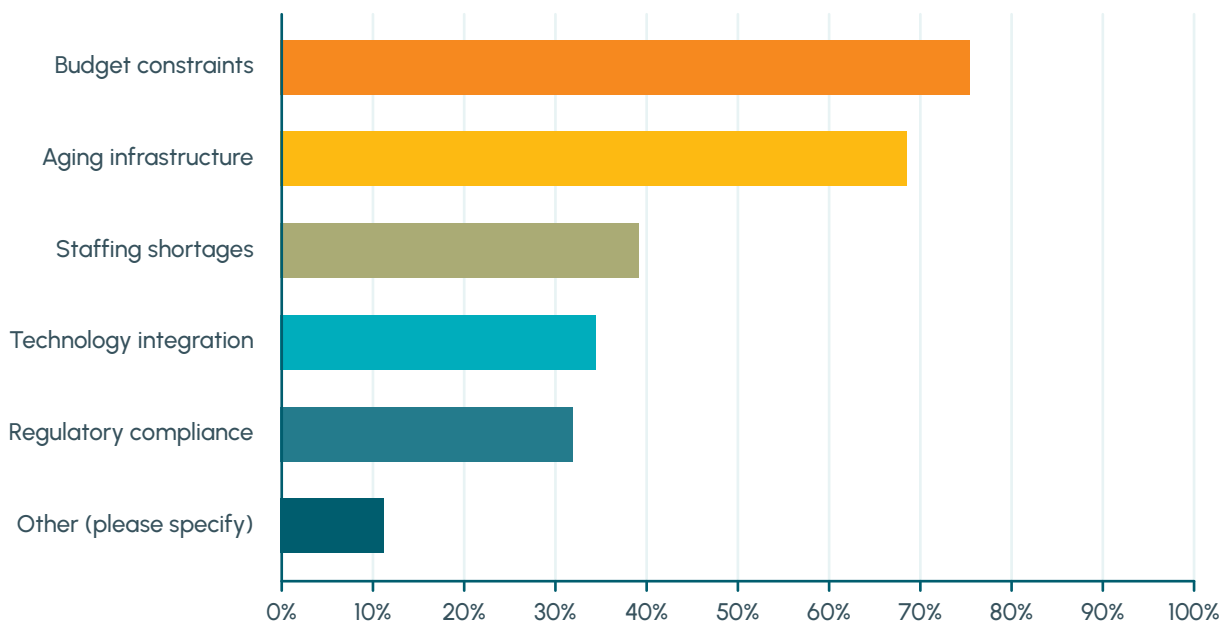
The top challenges in FM

Survey respondents were asked to identify their biggest challenges.

The results revealed that:

- **Budget constraint** is the top challenge, indicating widespread financial pressures on FM teams
- **Aging infrastructure** is a major issue, particularly education and healthcare.
- **Staffing shortages** were reported by many respondents, emphasising the growing talent gap in FM.
- **Regulatory compliance** remains a key concern, as organisations struggle to keep up with evolving legislation.
- **Technology integration** was also highlighted as a challenge, indicating difficulties in adopting and implementing new digital tools.

What are the biggest challenges you currently face? (Select all that apply)



Everyone would love an endless pot of money to spend on maintenance, but for many years this has been far from reality. Organisations are struggling to secure sufficient funding for maintenance and repairs, and this is before technology adoption and sustainability enters the conversation. This is particularly an issue in both education and public sector organisations where budget reductions often lead to deferred maintenance as a cost saving measure, which ultimately leads to more significant asset failures and inefficient operations and unnecessary costs as a result. Both sectors have a huge maintenance backlog, but it is a never-ending cycle to get facilities compliant without the necessary funding and resources to carry out the work required.

On top of this, it is reported by the National Audit Office in 'Maintaining Public Service Facilities' that delaying backlog maintenance can increase costs by over 1.5 times in just 2-4 years.



This is further compounded with aging infrastructure, which poses a major challenge for organisations.

Often, buildings are several decades old and require urgent maintenance. The cost of refurbishing or replacing aged buildings places additional financial strain on organisations that are already dealing with significant budget challenges. Buildings reach this state through a lack of strategic asset management. When a building is constructed, it has a required life expectancy and the assets within it have a reference service life. Preliminary costs forecasts can be made on maintenance cost and lifecycle replacement using NRM3. Very few organisations consider this or recalculate during the life of a building. This means organisations have no clear picture of the necessary costs to maintain their buildings.

The aging infrastructure comes with a sense of frustration when the technology discussion enters, because aging buildings are not set up with the digital infrastructure to fully optimise the use of technology. There is concern that with the technology available advancing, aging buildings will be left behind as maintenance moves on, yet they will still need to remain compliant all the way through to the disposal phase of the building.



On top of this,

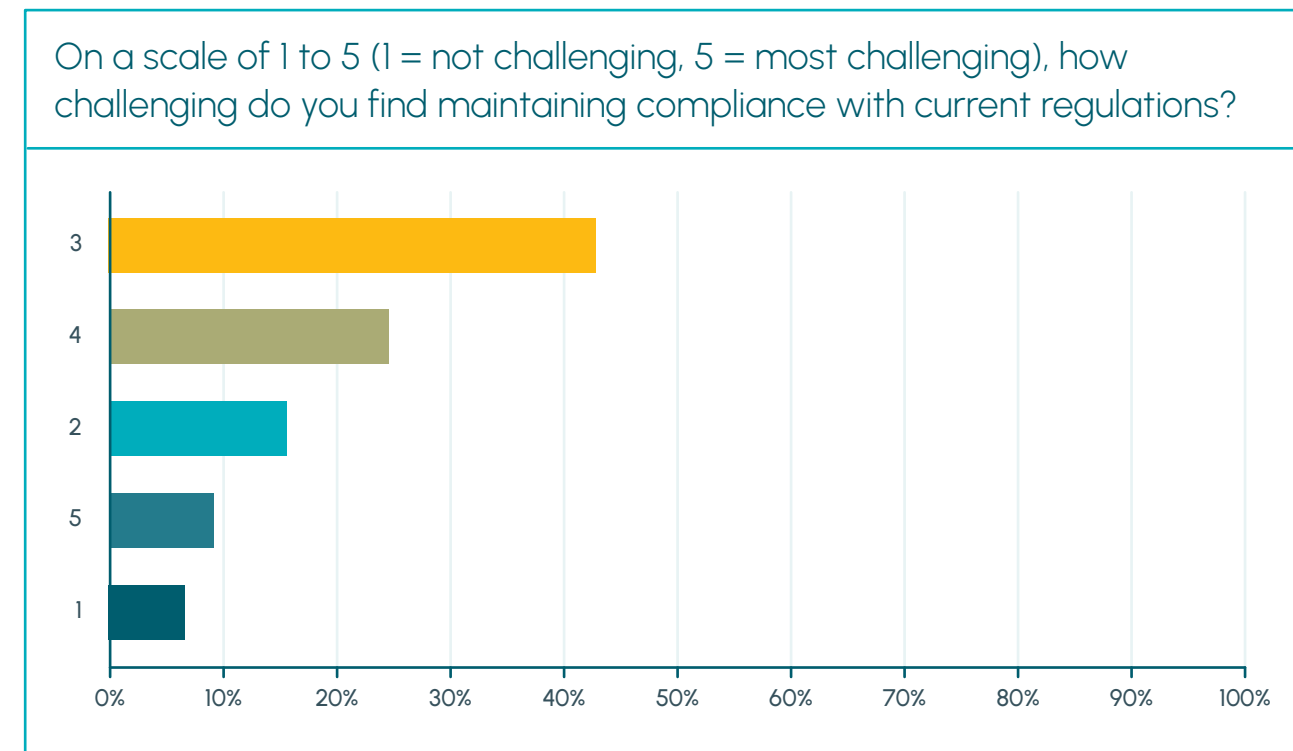
staffing shortages reflects a broader issue in the industry – the need for skilled FM professionals is growing, but recruitment is not keeping up with the demand. As a result, FM teams are often overstretched, leading to reduced efficiency and increased risk of operational failures. It is not just the hard FM skills that have recruitment challenges; respondents also reported a huge skills gap in the use of technology and sustainability credentials in the sector, with FM teams often having to just ‘figure it out’. Without a drive to recruit more people with technology and sustainability backgrounds into the sector, the burden on FM teams is going to increase further and the already thin resources will be further stretched.

Essentially, when organisations are starting from a point of budget constraints and challenges, the other key trends that are seen as solutions create initial short term costs, which result in further budget challenges, and teams turn to a fix on fail approach as a short term cost measure. With that comes a staffing shortage where implementing solutions to get use of the benefits becomes difficult. This is how sectors are entering maintenance backlogs worth millions of pounds. Cost is the ultimate challenge for the FM industry and providing more cost effective solutions to achieve compliance, whilst also driving forward sustainability initiatives is a critical ask.

The challenge of compliance

Compliance is another challenge which emerged from the survey. Respondents were asked on a scale of 1 to 5 how challenging they find maintaining compliance with current regulations.

This was the breakdown:



- The majority of respondents rated compliance difficulty as **moderate** (3/5), indicating that while they may be on top of compliance, it is a challenge that exists in their organisation.
- A significant portion rated compliance as **'highly challenging'** (4-5), highlighting concerns about evolving regulations, how to stay up to date and what non-compliance means in the era of the Building Safety Regulator.
- Only a small percentage rated compliance as **'not challenging'** (1-2), suggesting that compliance is a universal concern rather than an isolated issue in specific sectors.

Regulatory compliance is a pressing concern across the FM industry, but it is particularly critical in highly regulated industries such as healthcare, education and other public sector. New legislation, coupled with high profile incidents such as the Grenfell Tower fire, has put compliance in the spotlight. In a previous survey conducted by SFG20, we found that 70% of Facilities Managers don't fully understand their compliance responsibilities. This data backs up this statistic with 77% of survey respondents find compliance at least a moderate challenge (scoring 3/5 or above).

With moderate being the most popular response for this question, it suggests that many organisations have some compliance measures in place but are still facing challenges in the current legislative landscape.

This includes:

- Staying up to date with legislation changes
- Ensuring staff are trained in compliance procedures
- Being able to evidence compliance and ensure documentation of maintenance that takes place.

The consequences of non-compliance are no joke. To take a look at what the consequences are of being non-compliant with building maintenance legislation, watch [this video](#).



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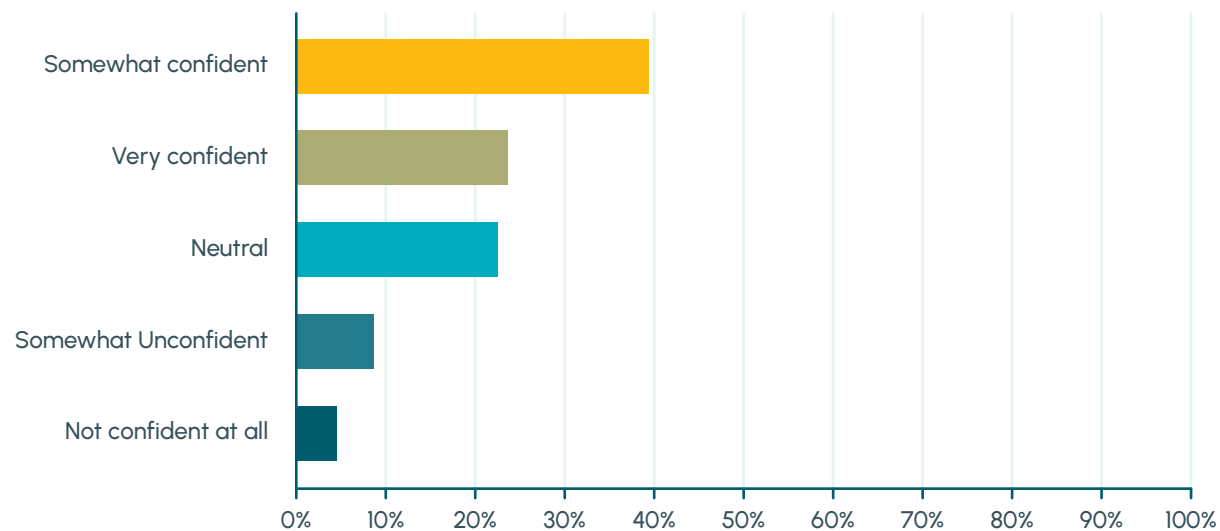
A level of compliance confidence

Achieving building maintenance compliance was ranked as the top priority for organisations in the FM industry within this survey, yet 77% find compliance challenging.

In a period of huge legislation change this may not be surprising as it is not just staying up to date that becomes challenging. The demand is also increasing for being able to evidence skills requirements for compliance and safety experience and technical maintenance skills. But how are organisations getting on with getting up to speed with the latest regulations?

- **63%** (119) of respondents reported being either somewhat confident or very confident
- **23%** (43) of respondents reported being neither confident or unconfident
- **14%** (26) stated they were either somewhat unconfident or not confident at all.

How confident are you in your organisation's ability to comply with new legislation and regulations (e.g., Building Safety Act 2022)?



Respondents may feel confident in their ability to comply because they have systems and processes in place, but when they dig into the details, they realise achieving and maintaining compliance is far more complex.

There is often a gap between perceived and actual compliance, and with the majority of respondents finding compliance challenging, this is what we are seeing.

In addition, compliance requirements are constantly evolving, and different buildings and sectors have unique regulations. Many organisations believe they are compliant, but when faced with audits or changing legislation, they struggle to keep up.

Recording of reports, discussions, and decisions relating to compliance is where organisations should start, in fact, this should be mandated. It is one of the few ways decision making and maintenance resource allocation can be evidenced and create true ownership of compliance. The NHS use After Action Reviews (AAR) as a continuous quality and patient safety improvement tool. As mistakes in healthcare can lead to potentially life threatening or life altering risks to patient safety, healthcare providers are tasked with a challenge of the upmost importance. They must create and maintain an environment where mistakes are avoided wherever possible, caught early and managed effectively when they do happen. This means that lessons can be learnt constructively and be applied in the future to avoid them being repeated. This use of AAR should be applied to Building Safety. Whilst the Health and Safety Executive (HSE) do have HSG245 - Investigating accidents and incidents, too often it is used to apportion blame and not look at root cause and course correction. As recognised by respondents, compliance requires dedicated resources, with both time and expertise.

Many organisations operate with limited budgets and staff, so while they may believe they have the right frameworks in place, executing them consistently is a challenge. Ultimately, this suggests that while facility managers want to prioritise compliance and feel they have the right tools, many are realising that their current processes might not be as robust as they need to be.

A recent study conducted by the Building Engineering Services Association (BESA) revealed that 88% of people are aware of the Building Safety Act but only 1 in 10 understand their duty holder roles. This correlates with what we have found in this survey. Respondents are confident in their ability to comply with new legislation (awareness), but maybe there is a gap in understanding on what is required to comply with the latest legislation (responsibility).

Staying up to date with legislation is challenging and costly to an organisation that does this in house. When balancing maintenance, supply chain partners, technology adoption, data reporting, achieving net zero targets and resource planning is added into the mix, it is difficult to be on top of everything with both a stretched resource and budget constraints.

Respondents raised that this is impacting the ability to invest in regular compliance training to keep staff up to date, especially when the changes are frequent.

88% of people are aware of the Building Safety Act but only 1 in 10 understand their duty holder roles

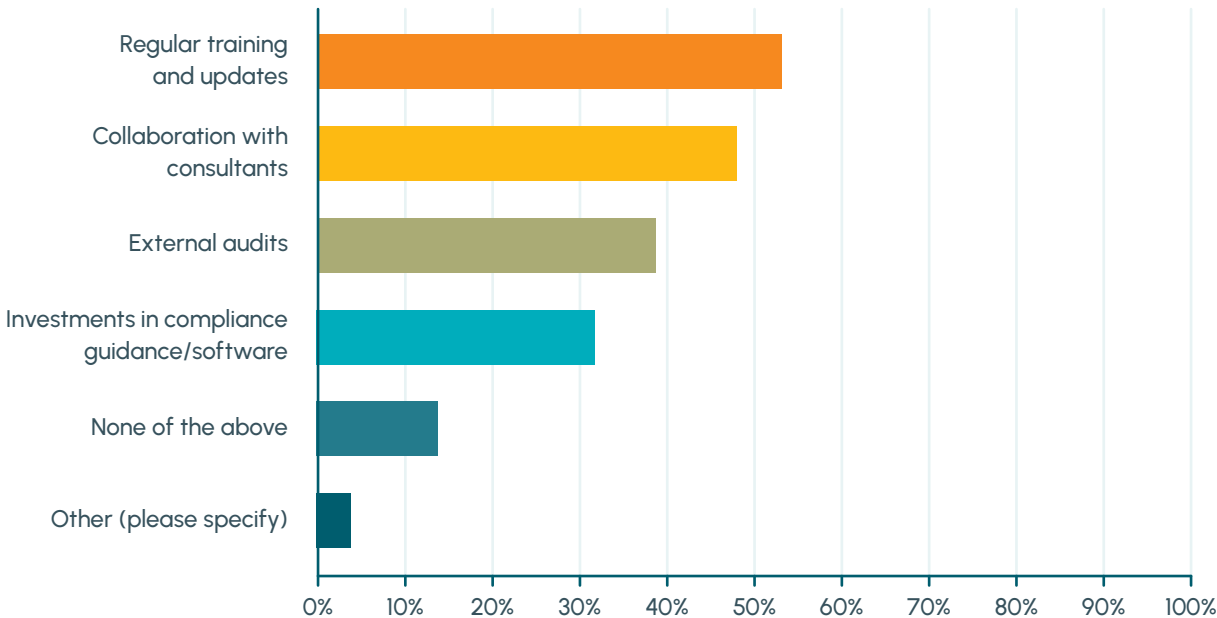


We asked respondents about what they are doing to stay up to date with the latest legislation in order to achieve compliance.

This is what we found:

- Regular training and updates are the most common strategies, with **101** respondents selecting this option.
- Collaboration with consultants was the next highest with **92** respondents
- **27** respondents stated they were not doing anything to stay ahead of regulatory changes
- In the **8** 'other' responses, a common theme was having 'no money to facilitate' or 'not receiving the support to deliver', showcasing that lack of resources is leading to some organisations doing nothing to stay up to date.

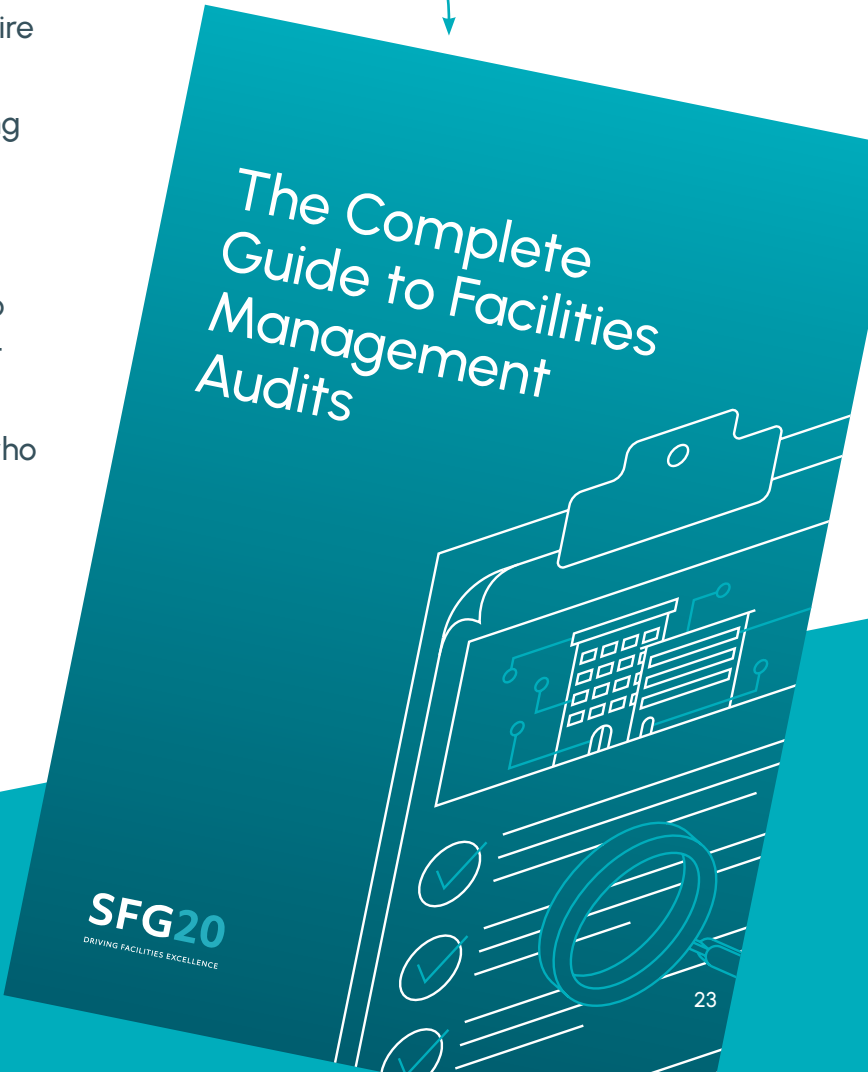
What measures are you taking to stay ahead of regulatory changes?
(Select all that apply)



Both training and use of consultants is popular and suggests that most organisations don't have the expertise to stay up to date with changes to legislation and industry best practices. This will continuously be an issue in an era where legislation and regulations will only continue to tighten, with greater scrutiny on compliance and accountability. While many organisations feel confident in their ability to comply, the reality is that regulatory expectations are evolving, and proving compliance will become more data driven and evidence based. Without complete and up to date asset information, organisations risk falling behind in both meeting compliance but also demonstrating it when challenged. Now more than ever, organisations require a proactive approach to asset data management to stay ahead of increasing regulatory demands.

It is concerning that some organisations are not putting any measures in place to stay up to date with legislation. This isn't just about complying with the law, it is about making buildings safe for those who occupy them.

Without stringent measures of staying up to date with legislation, organisations are putting themselves at risk. 73 organisations are using external audits. Undertaking audits internally can be more cost effective and lever the organisations existing knowledge and expertise. On the other hand, audits provided by third parties are unbiased, independent assessments and can help identify potential risks or areas for improvement that internal staff might overlook. If you want to learn more about getting an external audit or conducting one internally, check out the [Complete Guide to FM audits e-book](#).



SFG20 Recommendations:

1.

Introduce **compliance as a standing agenda** item for executive teams so that the board can receive a clear and transparent information on the state of compliance in the organisation. There needs to be discussions involving Subject Matter Experts (estates, risk, legal) on the implications and actions required linked to future resources. Where premises are designated as Higher Risk Buildings, the minutes and actions (including any dissent and contradiction) should be recorded within the Golden Thread. This becomes part of the evidence chain in the event of safety incident.

2.

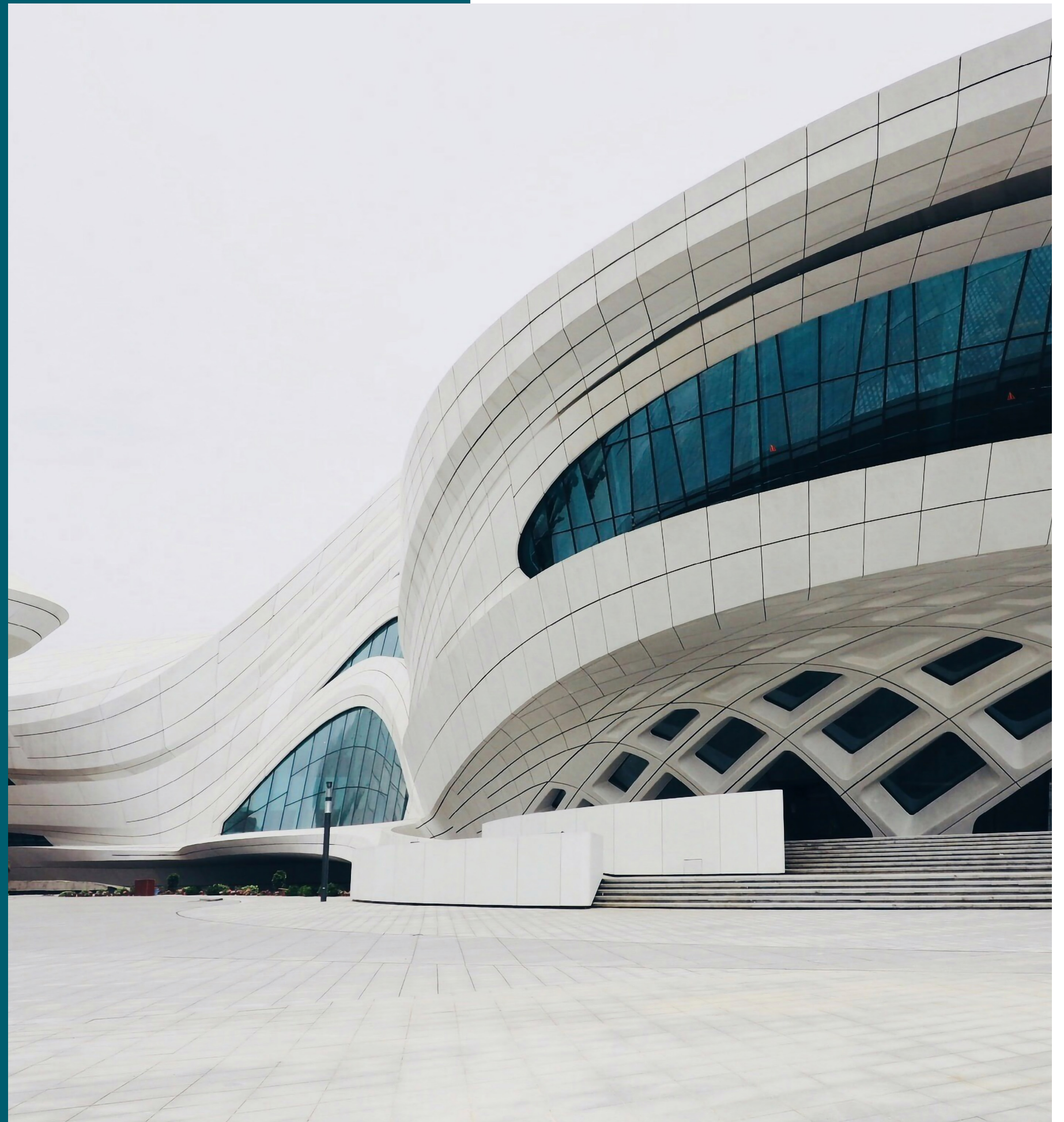
Stay up to date with the latest legislation and regulation changes by using the SFG20 industry standard. You can access this through software solution Facilities-iQ where you can build a compliant maintenance strategy, mapped to maintenance guidance that aligns with legislation, and be notified of changes when regulation is updated.

3.

Consider **third party audits** from external parties to provide an independent validation of compliance efforts and identify areas for improvement.

4.

Ensure **competence through regular CPD**. CPD is your way of evidencing that you are competent to be able to carry out specific maintenance tasks. Doing the relevant CPD hours to maintain your professional associations will help you to achieve compliance and ensure your staff are up to date with the latest best practices.



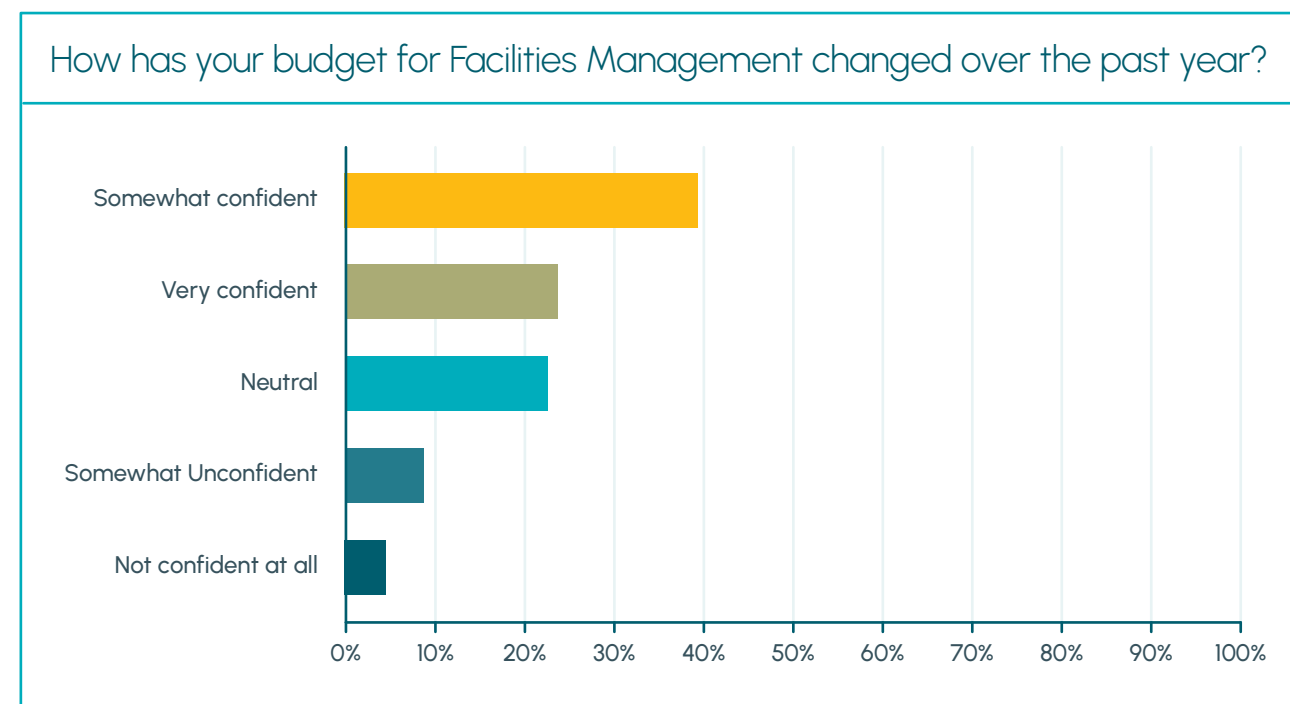
The Desperate Need to Reduce Operational Costs

Facilities cost a significant amount of money to run and maintain. There is no getting away from that, and it creates challenges for the FM industry where businesses are strapped for cash, maintenance costs are increasing, and compliance requirements are stretching teams that are already understaffed.

Through this survey, budget constraint has emerged as the biggest challenge in the FM industry, and the problem is compounding with aging buildings that often require more regular maintenance. This correlates with 'reducing operational costs' being the second priority for the industry.

To dig deeper, we asked respondents how budgets have changed over the past year within the sector, in a period that has seen increased costs in parts and raw materials required to carry out maintenance.

This is what people told us:



- **40%** (75) reported a decrease in budget in the last year, with 13% of those stating their budget 'decreased significantly'.
- **22%** (41) reported a slight increase in budget, indicating an inflationary budget increase.

- **29%** (55) reported that there was no change in their budget.
- **9%** (17) reported a significant increase in their budget. The highest portion of these responses were in the Commercial Real Estate sector, although four working in healthcare reported a significant increase in FM budget.

69% of organisations who took part in the survey have either the same, or less budget for FM activity compared to last year. It is not surprising that budget is considered the highest challenge for FM teams. With such budget constraints it is easy to see how maintenance backlogs, in particular within the education and healthcare sectors, have emerged.

There is a second piece of the puzzle here in that FM teams are not putting forward successful business cases for the necessary budget and resource to carry out compliant building maintenance. Often it can be difficult to convince stakeholders outside of FM of the importance of investment in software and carrying out planned maintenance. Generally speaking, 'fix on failure' is the attitude that non-FM individuals have towards maintenance, so you are starting from a difficult standpoint to begin with.

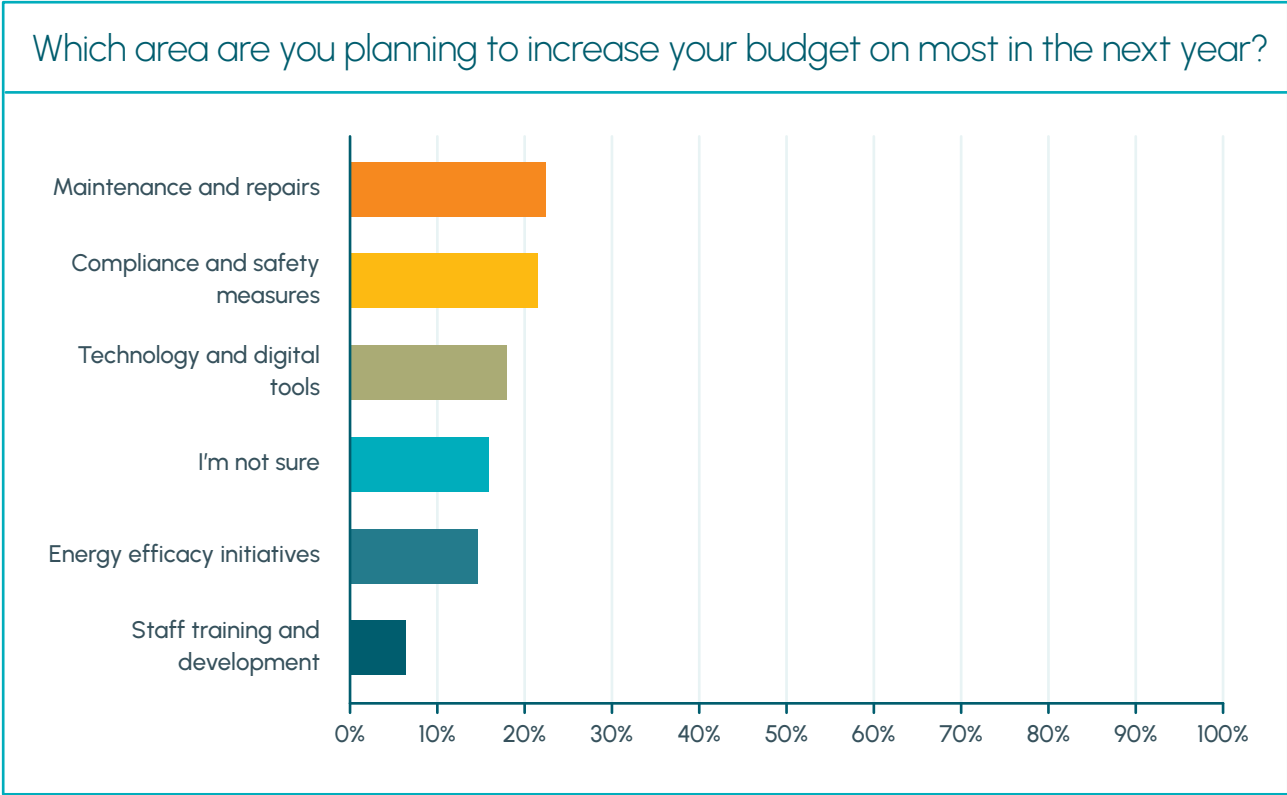
Maintenance of buildings is critical to the running of every organisation, and without it there can be significant disruption to business operations. It not only increases risk of operational downtime, and the costs associated, but also risks non-compliance, leaving organisations exposed to penalties from Health and Safety Executive (HSE) and reputational damage. This is a message that needs conveying to those who can make or influence the decision outside of FM.

To help with putting together a business case to convince your key stakeholders to invest in FM, check out the [SFG20 business case resources e-book](#). The business case pack is specifically for SFG20 software solution, Facilities-iQ, however you can use the principles within this to help build out other cases for budget.

With limited budgets available, we asked where organisations are planning to invest their budgets over the next year.

The results show:

- **24%** (45) plan to increase their budget on maintenance and repairs
- **23%** (43) plan to increase spending on compliance and safety measures
- Technology is a budgetary priority for **18%** (35) organisations
- **17%** (32) don't have a plan for their spending
- Energy efficiency is the budget priority for **16%** (32) of respondents
- Staff training and development (**8%**) are the least prioritised areas for budget increases in the next year.



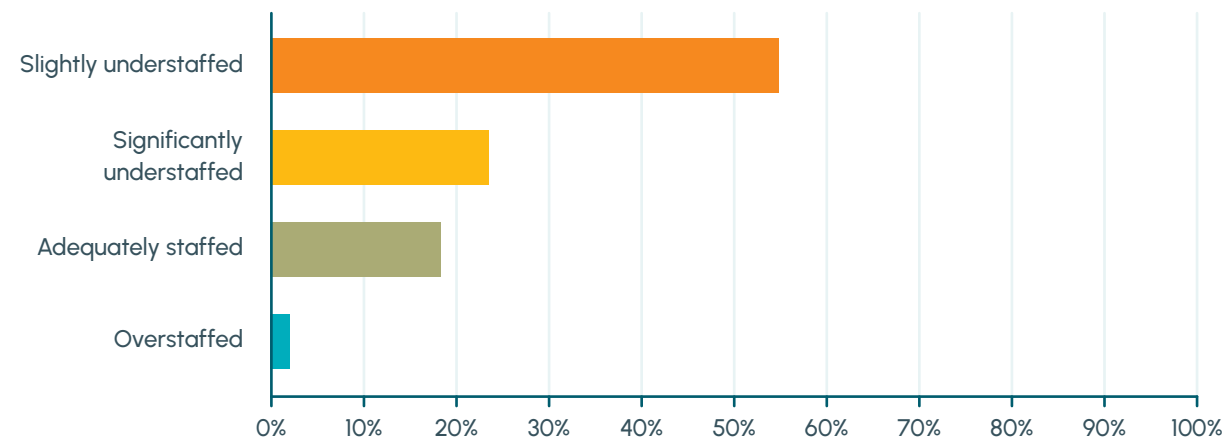
The prioritisation of budget towards maintenance repairs and compliance fits with the top priorities in the industry. With the highest spending increase going towards maintenance, it correlates with the aging infrastructure of buildings, and therefore an increase in necessary monitoring and maintenance of those assets. Where there are budget difficulties this will prove challenging and mean rising maintenance backlogs for organisations. This also indicates why 17% of the respondents are unclear on where they may increase budget, because they may be leaving buffer in their budget to account for maintenance emergencies which are likely to be greater with an aging infrastructure.

To futureproof buildings effectively, strategic investments in technology and energy efficiency are essential for achieving sustainability targets and driving cost savings. Implementing energy efficient initiatives, such as installation of LED lighting, not only lowers a building's operational costs but also delivers a strong return on investment, despite the initial capital outlay.

Similarly, investing in technology can enhance remote asset monitoring capabilities, reducing the frequency of onsite visits. This can, in turn, translates into significant time and financial efficiencies for organisations, reinforcing the long-term value of a proactive approach to building management.

Unsurprisingly with a stretched budget, the least prioritised area for investment is staff training and development. Although keeping these costs low allow for spending in other areas, it is likely to mean that realisation of benefits of using technology, implementing sustainability initiatives, and staying up to date with the latest legislation become more of a challenge for organisations. This does also require time for individuals to be able to spend upskilling in these areas, which is another challenge organisations are facing, with many stating they are understaffed.

How would you rate the current staffing levels in your Facilities Management team?



The data here is overwhelming and almost all FM teams are working without the resource they need to execute everything they are responsible for. This puts the state of facilities management in a poor position. Fewer staff means increased workloads, which heightens stress, which ultimately leads to burnout and therefore reduced efficiency and management of facilities. This is likely to result in inefficiencies with carrying out necessary maintenance tasks, impacting organisations' abilities to remain compliant with building safety regulations and standards.

Without adequate resources to carry out statutory maintenance tasks, FM teams will face significant challenges in reducing maintenance backlogs and ensuring buildings remain safe and compliant. Securing the necessary support is critical to maintaining regulatory standards and preventing the long-term risks associated with deferred maintenance.

The data shows that:

- **80%** (150) respondents feel their FM teams are understaffed, with 24% (45) stating they are significantly understaffed.
- **18%** (34) feel like they are adequately staffed.
- **2%** (4) think they are overstaffed.

SFG20 Recommendations:

1.

Create a Target Operating Model to deliver against the organisation's risk appetite, estates, and facilities requirement. There must be the right mix of people, processes and technology to deliver the necessary activities. There needs to be a clear understanding of what an efficient and effective operation looks like to deliver the requirement. If that is not resourced, the risk increases and deliverables are less likely to be achieved.

2.

Understand the importance of data, including what questions need to be asked and what data is needed to be collected to produce the necessary information to answer those questions? What metrics are important to measure your performance and allow benchmarking against similar organisations? It is through metrics and benchmarking that you can see if you are operating efficiently or whether there is room for improvement.

3.

Build a compelling business case for funding and resources within your FM team. A business case can feel like a lot of work for little in return, but you are battling against other business priorities for funding. Your case must be compelling, and it is worth spending time putting a strong case forward. Check out these [SFG20 business case resources](#) to shrink the time it takes you to build your business case.

4.

Prioritise your statutory maintenance tasks above non-statutory tasks so that you can ensure you are carrying out everything you need to achieve compliance. To understand the difference, [check out this video](#).



Slow Technology adoption in FM

Digital transformation has become a core focus within the FM industry, as organisations seek to lever technology to improve efficiency, reduce operational costs, and enhance compliance.

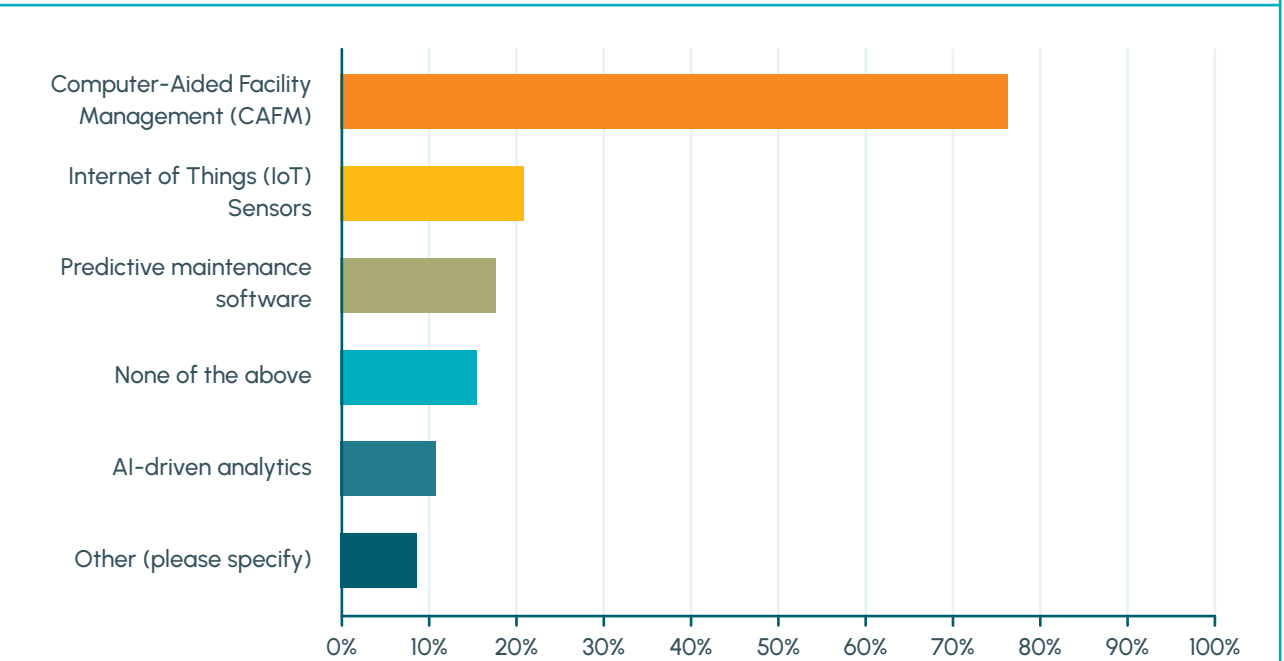
We asked survey respondents about:

- Technology they are using
- Barriers to technology adoption
- The importance of digital transformation in their organisation

In the use of technology, the trends that were highlighted from respondents were:

- **Computer-Aided Facility Management (CAFM)** systems are the most widely used tool in FM, indicating that many organisations are embracing software to help manage their maintenance. Respondents indicated that 60% of organisations are using a CAFM system.
- **Internet of Things (IoT)** sensors are used by some of the sector but are not widely adopted.
- **Predictive maintenance software** adoption is relatively low, despite its potential to reduce costs and improve asset longevity.
- **AI-driven analytics** is still in the early stages of adoption, with only a small percentage of organisations using AI.
- A notable proportion of respondents indicated that they do not use any of these technologies, highlighting the **slow pace of digital adoption**.


What technology tools are you currently using? (select all that apply)



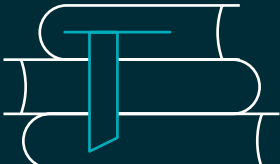
The widespread adoption of CAFM systems is unsurprising, given their long-established presence in the industry and the operational efficiencies they provide in managing maintenance. However, the low uptake of IoT and AI technologies highlights the sector's slow pace in embracing digital transformation. This lag is largely attributed to budget constraints and a persistent technology skills gap within the FM sector. While the concept of smart buildings holds significant potential, it remains largely theoretical for many organisations. To unlock these benefits, the industry must accelerate its digital transformation efforts.

Among the respondents surveyed, commercial real estate organisations and large corporate offices are at the forefront of IoT adoption, leveraging data-driven maintenance strategies. Healthcare and public sector organisations rely heavily on FM technologies, such as CAFM, CMMS, and IWMS systems, to manage their maintenance operations.


Technology adoption across the FM sector remains slow, and our research identified key barriers impeding progress:




High costs remain the primary obstacle, with organisations struggling to secure funding and prioritise FM technology investments over competing business needs.



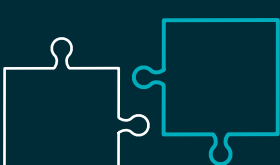
Lack of internal expertise presents a significant challenge, as many FM teams lack the necessary technical skills to implement and manage digital solutions.



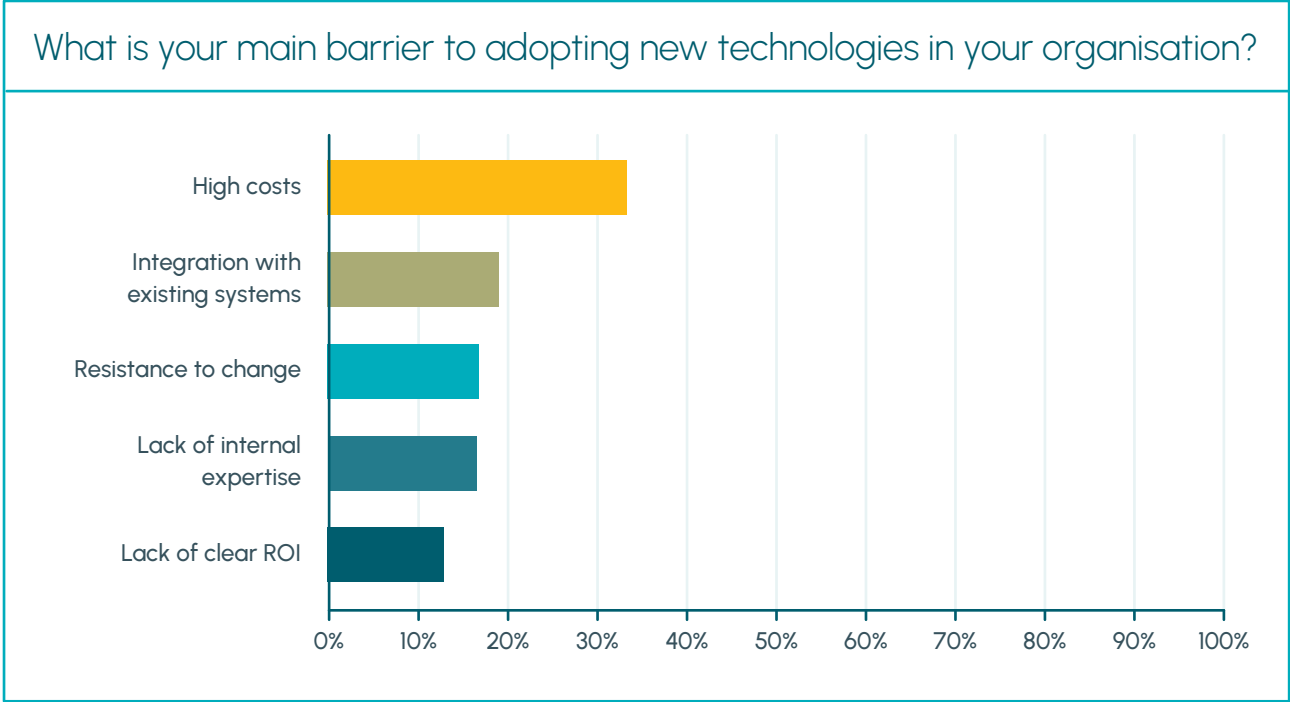
Resistance to change is a major factor, reflecting the cultural and operational hurdles associated with adopting new technologies.



Unclear ROI continues to be a concern, with some organisations hesitant to invest in digital tools without clear and immediate financial benefits.



Integration challenges with legacy FM systems further complicate adoption, as organisations face difficulties in merging new technologies with existing infrastructure.



The cost barrier highlights that many FM teams operate under strict budget constraints, making large-scale technology investments difficult. This is particularly true for public sector organisations, particularly healthcare facilities, and smaller businesses where funding is limited.

The lack of internal expertise underscores a critical skills gap in the industry. Many FM teams are experienced in traditional maintenance and asset management but are not up to date with the latest technology and how to use it to effectively get the benefits from it.

Resistance to change is an inherent factor when implementing new initiatives.

While it is often said that people dislike change, the reality is that they resist the potential negative consequences associated with it. In many cases, the actual drawbacks of adopting new solutions are minimal; however, perceived complexity or difficulty creates a significant barrier.

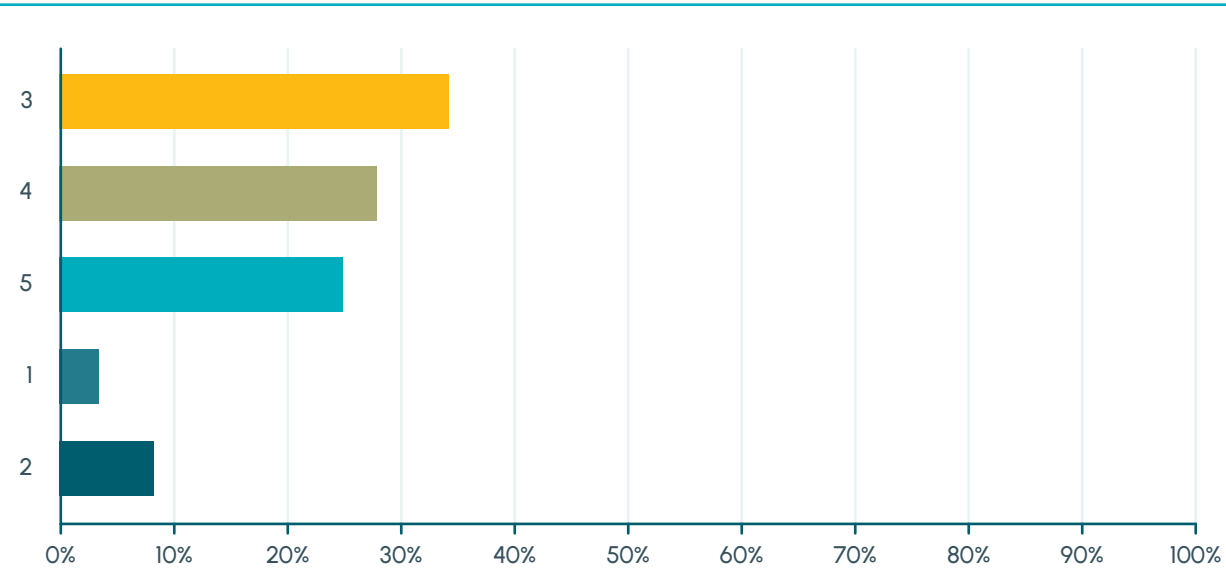
Typically, the long-term benefits of innovation far outweigh the initial discomfort of transition. The success of any technological implementation is heavily influenced by how well cultural change is managed. This process can either facilitate adoption or create further resistance, ultimately determining the effectiveness of digital transformation efforts.

This is an interesting angle to look at when organisations state that digital transformation is an important strategic priority for their organisation. Respondents were asked to rank the importance of digital transformation to their organisation's strategy on a scale of 1 to 5.

This is what we learned:

- **53%** (101) rated digital transformation as highly important (4-5), showing that most organisations recognise the need for adoption of technology
- **34%** (65) rated digital transformation as moderately important (3), indicating some level of commitment but possible uncertainty about immediate implementation.
- **12%** (24) rated it as less important (1-2), highlighting that some organisations are not focused on implementing technology.

On a scale of 1 to 5 (1 = least important, 5 = most important), how important is digital transformation to your organisation's strategy?



The FM industry is becoming more aware of the value that technology can bring to FM, with most organisations stating that digital transformation is a moderate priority (3/5). The early adopters have been actively championing the benefits but there is still the large majority who are still assessing their risk appetite and wanting more evidence, data and tangible case studies. They would consider dipping their toe in the water but are not yet convinced to throw the necessary resources to jump into full implementation despite early evidence of the value that it brings. It is also possible that they know technology will be beneficial but are unable to specify the benefits that it will bring and whether that is a return on investment.

Across the sectors, adoption was slightly different:

- Corporate real estate and large enterprises are leading the charge in digital transformation.
- Public sector and education organisations are slower adopters, likely due to budget constraints and legacy infrastructure.

“It’s encouraging to see the industry increasingly prioritising technology as a vital tool for achieving compliance and reducing operating costs. To overcome the significant challenges facing the sector, technology must play a central role. Recognising this, SFG20 are incorporating technologies such as AI search and asset mapping into our software and developing API integrations to assist industry with FM systems connectivity. A great way to start is to build a technology roadmap that is aligned to your organisation’s objectives



Paul Bullard,
Product Director,
SFG20

SFG20 Recommendations:

1. To motivate the majority, decision makers need to **see the technology in action**, and proof through practical application that the technology is effective and there is a clear return on investment. It requires the early adopters to throw open their doors and invite the sector to come and witness the opportunities and threats that come from the adoption of technology. There needs to be more visible case studies with clear evidence of the benefits.
2. **Identify sector pathfinders and champions** who have been implementing new technology and are willing to mentor and advise. Peer support and experience is likely to go further than just the supply chain and consultants evangelising on the benefits. People want to understand the risks and how to mitigate them.
3. **Develop digital roadmaps** to create a clear adoption plan for use of technologies within FM that are aligned to the business objectives of the organisation.
4. **Prioritise high impact technologies** that can help you save time and money that you can then use to further invest in technology that fits into your digital strategy. For example, some SFG20 customers have reported savings of £2 million by using Facilities-Q software to effectively manage their FM contracts.
5. **Skill adoption** of staff needs to form part of the digital strategy. If you can't fully utilise the technology you are purchasing due to skillset, this must be addressed quickly if you are to fully embrace digital transformation.



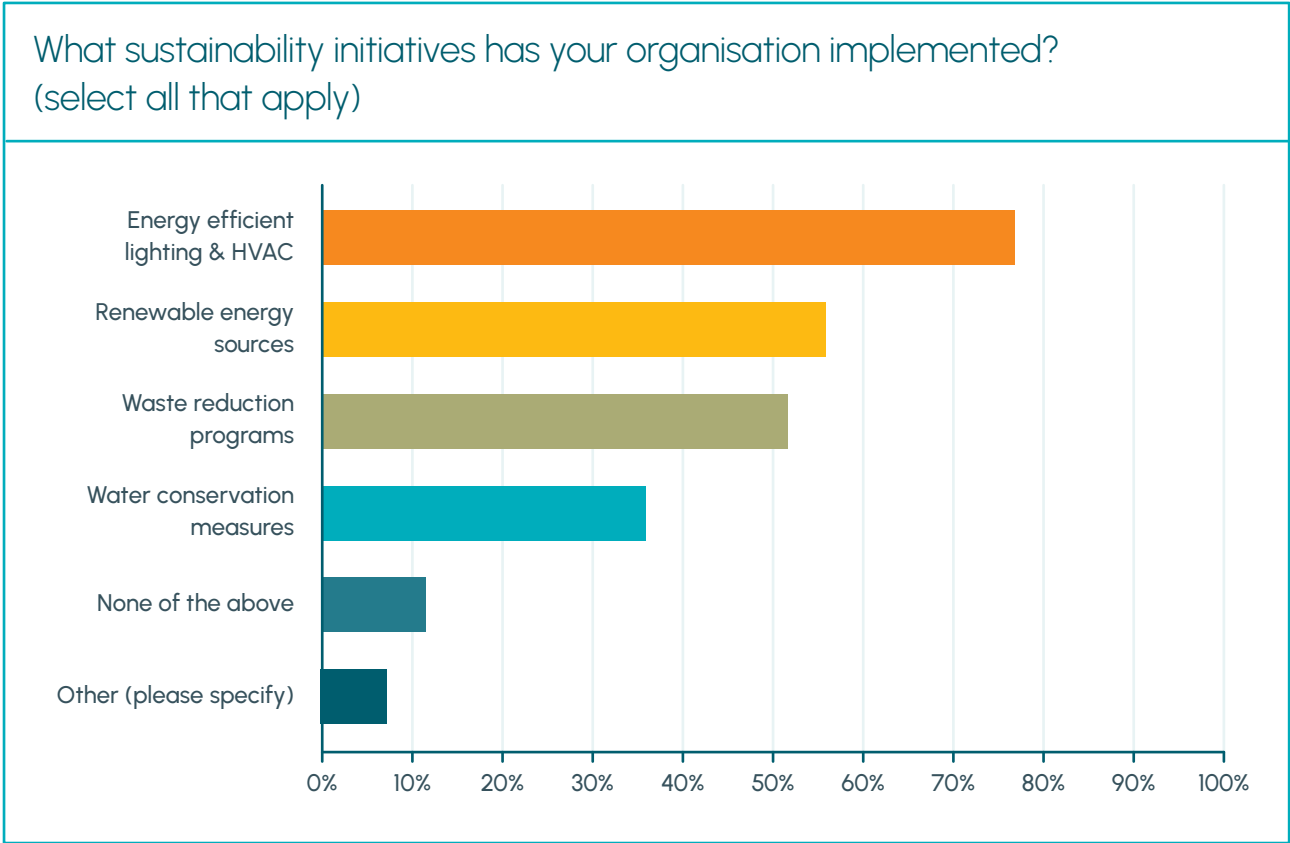
The race to net zero: moving slowly

The built environment accounts for 40% of global carbon emissions, with 30% attributed to operational activities and 10% to the construction and demolition of buildings.

Compounding this challenge, 80% of all non-residential buildings in use today will still be operational in 2050. Achieving net zero carbon is a formidable task, and the facilities management sector holds a critical responsibility in addressing the 30% of emissions generated by building operations.

While emissions reduction may not have been a strategic priority for many organisations five years ago, it is now firmly on the agenda. However, navigating the transition, particularly in aging buildings, remains a complex challenge. We asked respondents to the survey which sustainability initiatives their organisation has already implemented. We found that:

- **Energy-efficient lighting and HVAC systems** are the most common initiative, highlighting the focus on reducing energy consumption.
- **Renewable energy** sources are popular, showing a shift toward sustainable energy solutions.
- **Waste reduction** programs are being actively implemented across various industries.
- **Water conservation** measures were less commonly adopted, suggesting room for improvement in water efficiency strategies.
- A small percentage of respondents indicated that they have not implemented any sustainability initiatives, highlighting **gaps in adoption**.



The strong adoption of energy-efficient lighting and HVAC systems indicates that cost-saving and sustainability goals are aligning. These upgrades offer immediate financial and environmental benefits, making them a popular choice to get started on the net zero journey for FM teams.

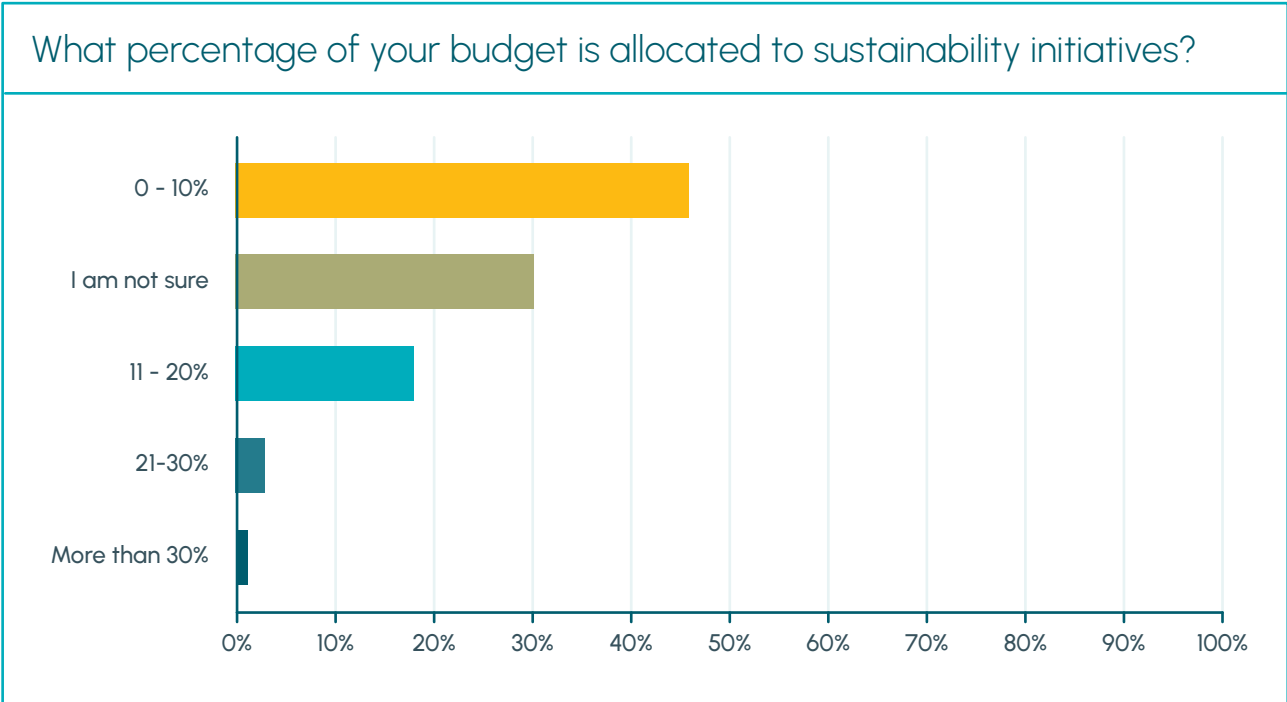
In addition, the widespread implementation of renewable energy sources suggests a growing commitment to long-term sustainability goals.

However, adoption rates vary depending on sector budgets and infrastructure limitations. The lower adoption of water conservation measures highlights an overlooked area of sustainability. Organisations could achieve significant environmental benefits by investing in water efficient fixtures and leak detection systems.

There becomes a point in the adoption of sustainability measures where budget constraints outweigh the ability to take the necessary steps. This is likely to remain a challenge unless there are compliance requirements and financial incentives to take the next step on the journey to making buildings more efficient. We asked organisations specifically about how much of their budget was allocated to sustainability initiatives.

The results show that:

- **0-10%** was the most common response, indicating that most organisations are dedicating a relatively small portion of their budget to sustainability efforts.
- Only a **small percentage** allocate more than 30% of their budget to sustainability, suggesting that large scale sustainability funding is still rare.
- **30% (57)** of respondents were unsure about their sustainability budget, pointing to a lack of visibility in sustainability financial planning.



There is not always a clear set of responsibilities on who owns the sustainability agenda in an organisation. Sometimes, the people with the responsibilities do not hold the levers to create change, and efforts are diluted and poorly resourced. The fact that most organisations allocate only 0-10% of their budget to sustainability suggests that sustainability is still seen as a secondary priority rather than something they want to invest in. This is enhanced further by the high percentage of respondents who are unsure about their sustainability budget.



David Hemming,
Service Delivery Lead,
NHS

“Many organisations make political statements about intent without a real understanding of cost to achieve it. Most organisations struggle to justify higher electricity bills, which places greater costs into the overheads and reduces - or even wipes out - margin. The level of investment to strip out assets before their end of life to replace them with more sustainable and greener assets is sometimes impossible to justify purely from a financial point of view.”

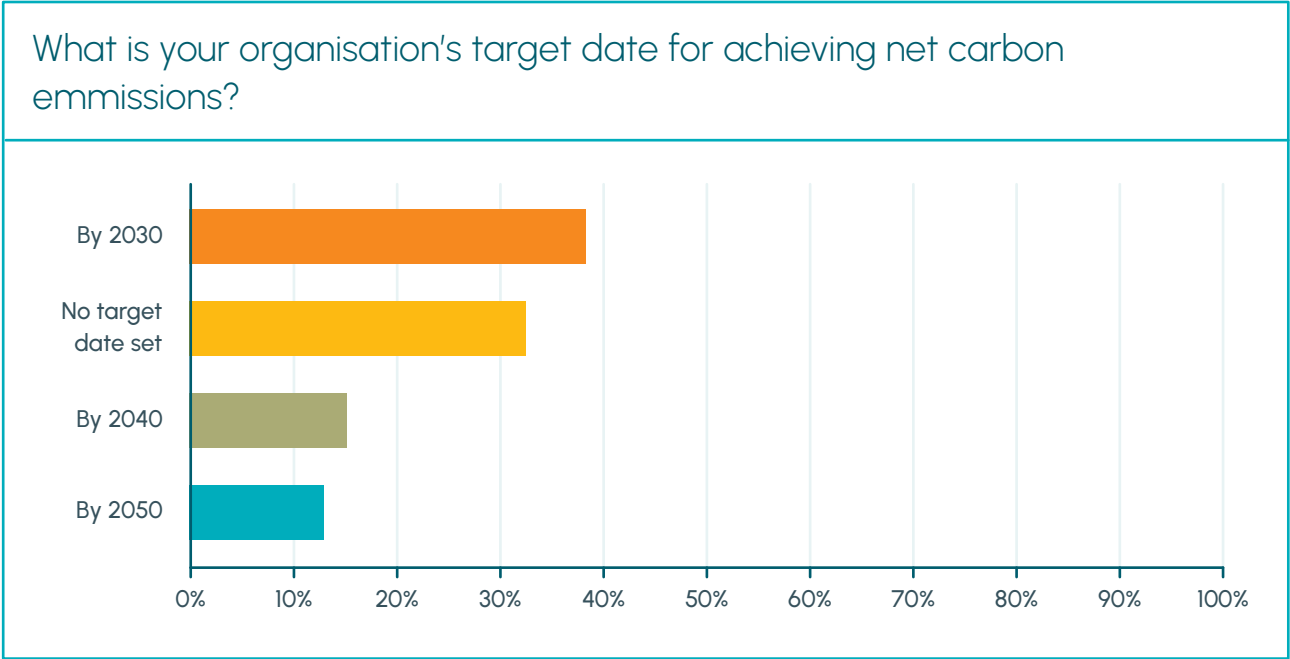


Many organisations don't have a clear strategy with a plan showing how sustainability actually impacts the business. In the same way that business focused maintenance organisations should try starting with business focused sustainability, rather than making grand sweeping statements of intent which will be difficult to achieve, consideration should be given to what can actually be achieved.

This would encourage meaningful sustainability budgets to be set, with clear targets and the necessary funding to achieve them. It is also possible that, although seen as important, FM teams don't know what or how to implement sustainability initiatives, including how to track them and what metrics are important. This is also suggested by the net zero carbon targets for organisations:

It is interesting to note that there is no clear correlation between the net zero target dates set by organisations and the sector that they operate in. Target timelines vary across all sectors without a consistent pattern.

The fact that many organisations have committed to a 2030 net zero target suggests a growing urgency in sustainability efforts. However, the presence of either long term (2040-2050) or non-existent targets suggests that the sector is behind the curve to hit net zero in the necessary timeframe. Although 73 respondents have selected the target date 5 years from now, without necessary sustainability strategies in place, it is likely that this is an aspiration rather than a realistic opportunity to achieve net zero in 2030.



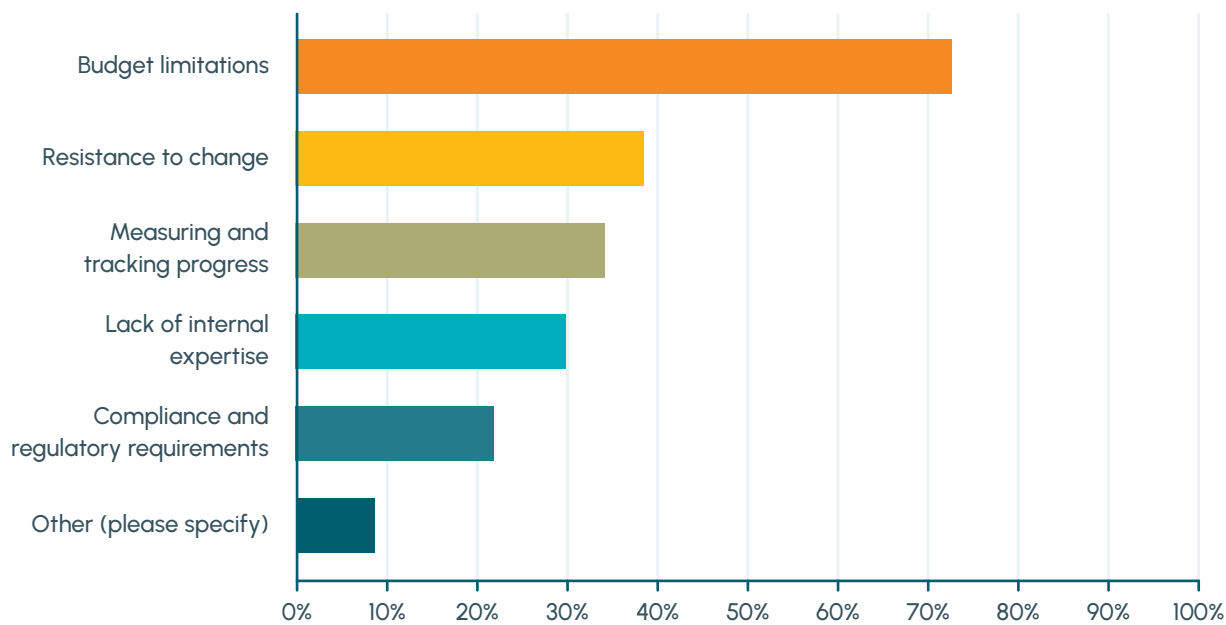
- **38%** (73) respondents selected 2030, aligning with global sustainability targets.
- **28%** (54) selected either 2040 or 2050, showing that long-term net zero commitments are still in place but vary by sector.
- **32%** (61) indicated they have not set a target date showing no plan for sustainability initiatives.



When asking about the biggest challenges to achieving sustainability goals, this is what we found:

- **Budget limitation** is the top challenge, with financial constraint being the biggest barrier to achieving sustainability goals.
- Organisations feel like they don't have the expertise in **sustainability management**.
- Challenges staying up to date with legislation highlight concerns about potentially evolving **sustainability legislation**.
- Organisations don't know how to **measure or track** their sustainability efforts to be able to benchmark their progress.
- Creating more sustainable practices means changing how things are done, and there is some **resistance to change** within the industry.

What are the biggest challenges in achieving your sustainability goals?
(select up to 3)



As already highlighted, skills gaps and budgetary constraints are the highest issues on the agenda across the board in FM. This is also greatly impacting the ability to achieve sustainability goals. Sustainability measures can be perceived as expensive, and without a sustainability strategy, and sufficient funding it is difficult to persuade key stakeholders to invest with high cost in the short term for long term financial and environmental gain. This is further enhanced by the sustainability skills gap within the industry. Training programmes and resources to manage sustainability programmes are something that organisations need to have in place, especially those with a 2030 net zero target.

The challenge of tracking sustainability progress is an issue that organisations in the FM industry are struggling with. How this is measured should be standardised across the industry which will make it easier to report, track, and make progress in the areas that will make the most difference first. Until this is standardised across the industry it will be difficult for organisations with budget challenges to make the necessary investments in this area.



SFG20 Recommendations:

1. **Create a sustainability strategy** with a clear roadmap that will outline how your organisation will achieve net zero carbon by your target date. Be clear on expansion and growth plans of the business and factor in innovation driving up unregulated energy requirements. As very few organisations will maintain steady state over the medium to long term, this should be factored into how you will report and track the progress against the proposed timeline.
2. **Be clear and realistic** on what can be achieved from internal resources and what will require external support. Very few organisations have assessed the true cost of achieving targets before making commitments on timelines that are not realistic.
3. **Combine technology and sustainability investments.** Consider what technology might also benefit your strategy to achieve net zero carbon. This might be data tracking, reducing site visits, remote management of facilities etc. This should be a standing criteria within the business case process.
4. **Explore funding options** including government incentives and green initiatives that will help to support renewable energy projects and sustainability upgrades. It is essential that you consider how to package up work and produce a business case ready for the release of funding in advance. The race for funding is not going to be won by a reactive position.



A huge problem for FM: built asset registers

Asset registers were identified as the leading investment priority by survey respondents. This is unsurprising given that many asset registers are incomplete or, in some cases, entirely absent.

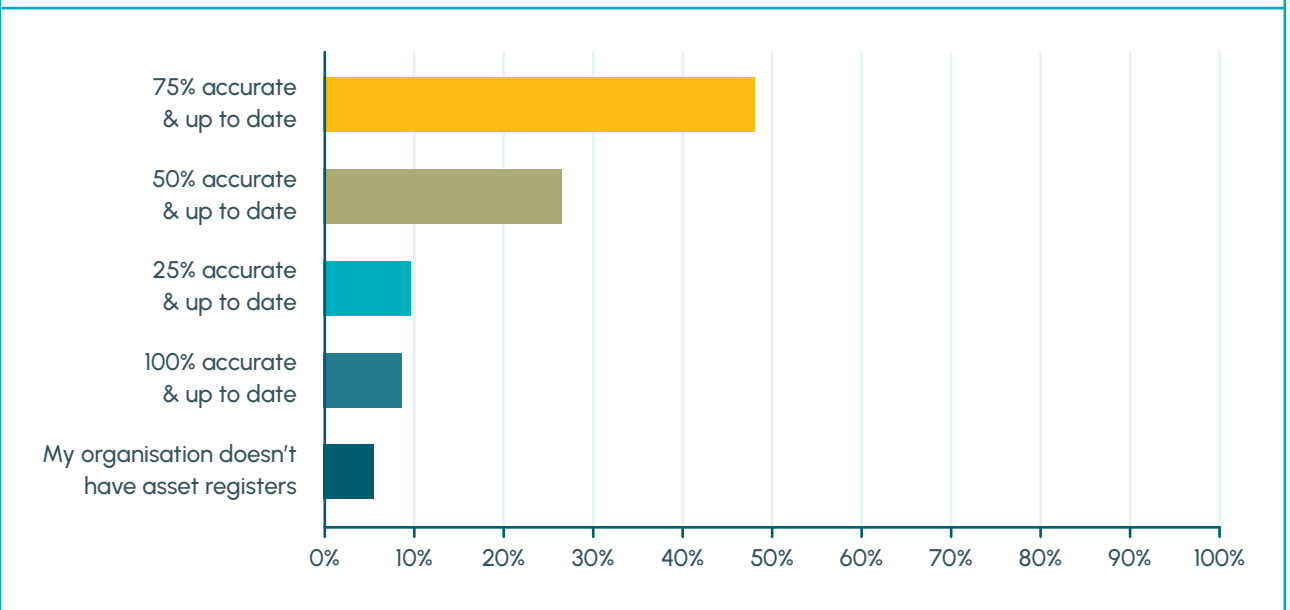
Several factors contribute to this challenge, including the collection of asset data across large estates, which may have been surveyed at different points in time and by different people, causing inconsistencies in data quality and accuracy. In addition, it is not unusual to encounter variations in the level of detail recorded for each asset.

There are further issues surrounding data ownership, storage, and management when asset data is contained within downstream FM software.

A comprehensive and well maintained asset register is essential for effective asset management, enabling organisations to optimise maintenance, enhance operational efficiency, meet regulatory requirements and mitigate risk. It sounds simple but it can often be overlooked so we asked the industry about their asset registers to understand their accuracy. Here is what we found:

- **91 (48%)** respondents stated that their asset registers are 75% accurate and up to date
- **17 (9%)** respondents believed their asset registers to be 100% accurate and up to date
- **70 (37%)** of respondents have an asset register that is at most 50% accurate
- **11 (6%)** told us their organisation doesn't have an asset register.

My organisation's asset registers are:



43% of respondents have less than 75% accuracy in their asset register, with 6% not having an asset register at all. This indicates a widespread issue within the industry with incomplete information about the facilities that people are managing. It not only suggests that people aren't capturing the asset data, but also that the methods of tracking assets is outdated. Missing, outdated, or incorrect asset register data is likely to lead to non-compliance, operational inefficiencies, and unplanned maintenance costs.

“ One of the most common issues we encounter is the lack of consistency and specificity in asset registers. Too often, assets are recorded with vague descriptions like ‘boiler’ or ‘pump,’ making it incredibly difficult to map them to the correct maintenance tasks. This leads to inefficiencies, increased risk, and compliance challenges. Ensuring asset data is consistently structured, complete, and digitally maintained in a single source of truth is essential—not only for effective planned maintenance but also for long-term cost savings and compliance.



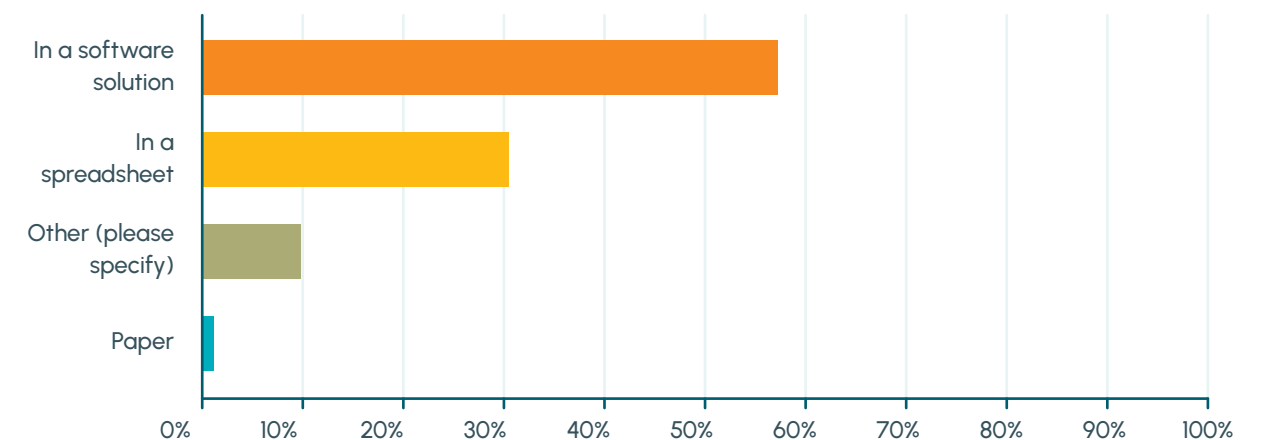
Davy Clark,
Implementation Consultant,
SFG20

The low number of organisations claiming their asset register is 100% accurate suggests that even registers that are well managed are still difficult to keep pace with changes in their facilities

This is further enhanced with a lack of automation and real time tracking of assets, delays in recording asset lifecycle changes due to capacity, and inefficiencies in manual data entry, where organisations are still using paper based solutions. In terms of storage of asset registers, we found that:

- **57%** (108) respondents keep their asset register in a software solution
 - **31%** (58) respondents keep their asset register in a spreadsheet
 - **2%** (3) organisations have a paper based asset register
 - **5%** (10) organisations have mix of software, spreadsheets, and paper based asset register
- This leaves the **11** without an asset register, with **two** stating that it is ‘high on the agenda’ for the next year.
 - Organisations that use software to store their asset register report a **25%** higher accuracy in comparison to organisations using other methods.

How is your asset register kept?



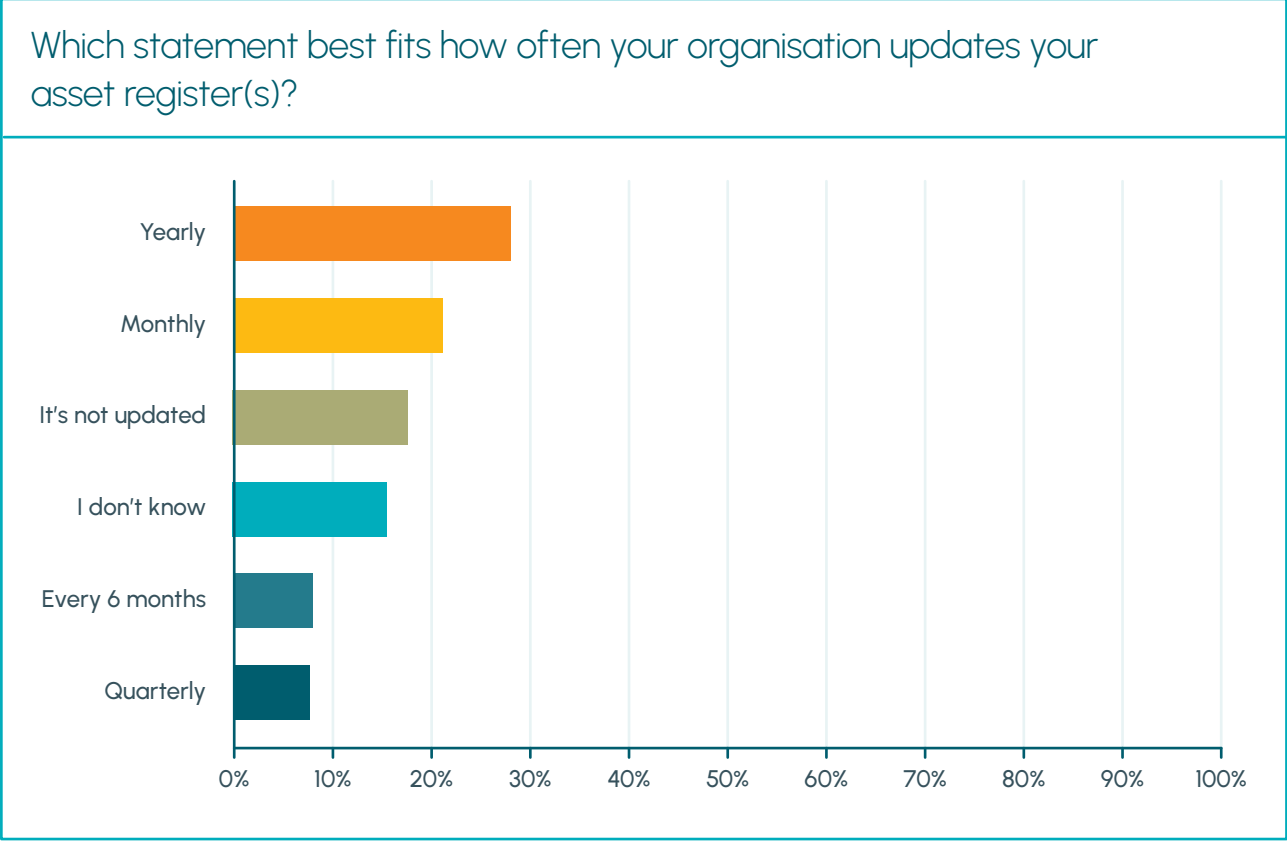
Asset registers should be maintained in a centralised, secure, and accessible system to ensure accuracy, consistency, and ease of management. The ideal storage and management approach depends on the organisation's size, complexity, and regulatory requirements. Use of software suggests organisations are embracing digital transformation, but FM teams are stuck in manual data entry which is limiting efficiency of operations, and time inefficiencies which could be resolved to increase capacity.

It is a concern that 38% of asset registers are not kept in a software solution. The concern rises in particular for the 5% who have their asset register in multiple formats. Although these responses suggest organisations are making that transition to software, holding asset data in multiple locations or formats makes it difficult to track and understand what maintenance is required to achieve compliant maintenance.

Asset registers need to be consistently updated to reflect an up-to-date view of assets contained within buildings, along with their condition,

We asked respondents how often they update their asset register, and this is what we found:

- **34%** (64) either don't update their asset register, or don't know how frequently it is updated.
- **28%** (53) of organisations update their asset register yearly
- **22%** (41) of organisations update their asset register monthly
- **16%** (31) are updating their asset register every 3-6 months



Once again, this data is concerning.

Most organisations don't know or can't say how often they are updating their asset register. This indicates that a third of organisations may not be updating their asset registers. This means a third can't be sure that they are maintaining their assets compliantly because they don't know what assets they need to maintain. With a cost crisis within the industry, this is a costly way of managing maintenance – if it isn't in the asset register it is unlikely to appear in any planned maintenance regimes.

This is inefficient, costly and could be non-compliant.

Organisations that are updating their asset registers monthly or quarterly are likely to be better positioned to be more cost effective in their approach, being able to implement planned preventative maintenance, resource and financial forecasting and evidencing compliance.



SFG20 Recommendations:

1.

It is essential every organisation has an accurate and up to date asset register. If you don't have an asset register, **create an asset register with a sense of urgency**. You can't have the confidence in your maintenance practices without one. Ignorance is not a legal defence in demonstrating compliance. The absence of an asset register shows a systemic attitude by the organisation to managing its legal obligations. This will present poorly in a legal case or a coroner's enquiry.

2.

Standardise the data in your asset register, having the same information for each asset, including an asset number and its condition.

3.

Develop robust processes to maintain the asset register. It is not a document that is created when the building is built and not reviewed. It is a live document that is expected to be reviewed and updated periodically - and especially after any lifecycle maintenance work.

4.

Consult the **SFG20 Professional Services team**, experts in ensuring the correct application of the SFG20 standard. Many people don't know where to start with fixing their asset registers, and the Professional Services Team can provide specifics on where to focus and what the data needs to look like. When your asset register is in shape, you can use SFG20 Mobiliser to map your assets to the relevant SFG20 schedules using AI.



Skills & Trends for the Future

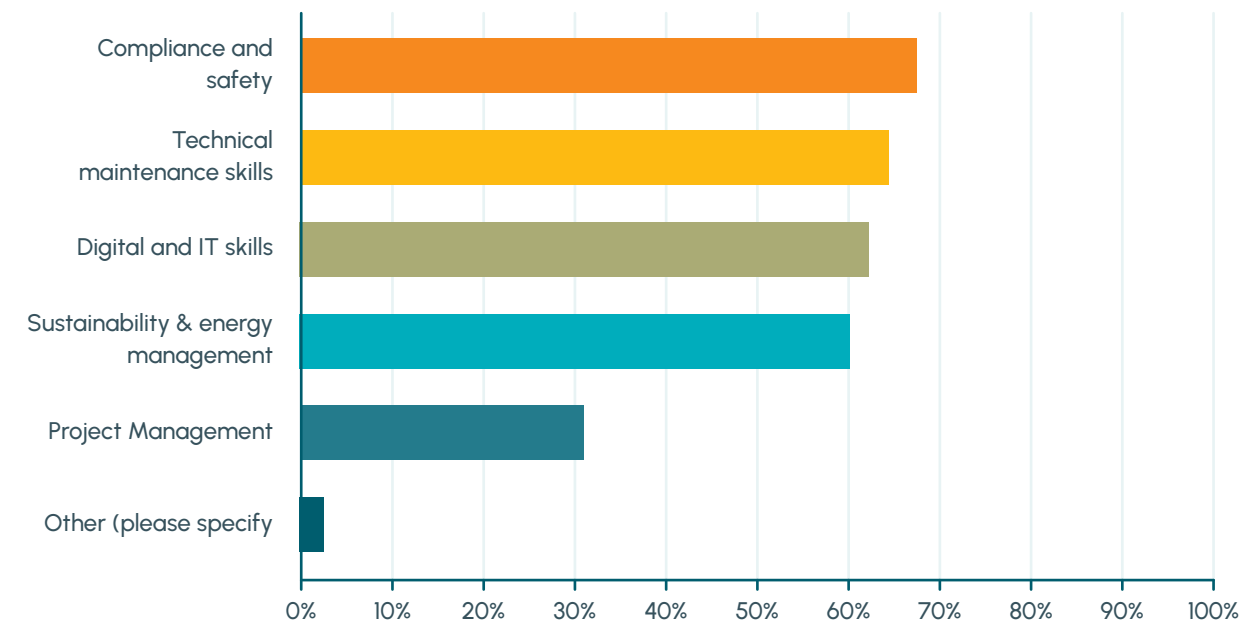
What does the future look like for the FM industry? What we know for sure is that compliance is in the spotlight and being able to maintain and evidence building maintenance compliance is going to require better management.

As technology advances there will be a need for the industry to adapt, both to maintain building records digitally for compliance, but also to help reduce the running costs of estates and track important data that will help keep buildings safe.

In preparing for the future, we asked respondents to identify the most important skills for the future of FM. People prioritised skills in this order:

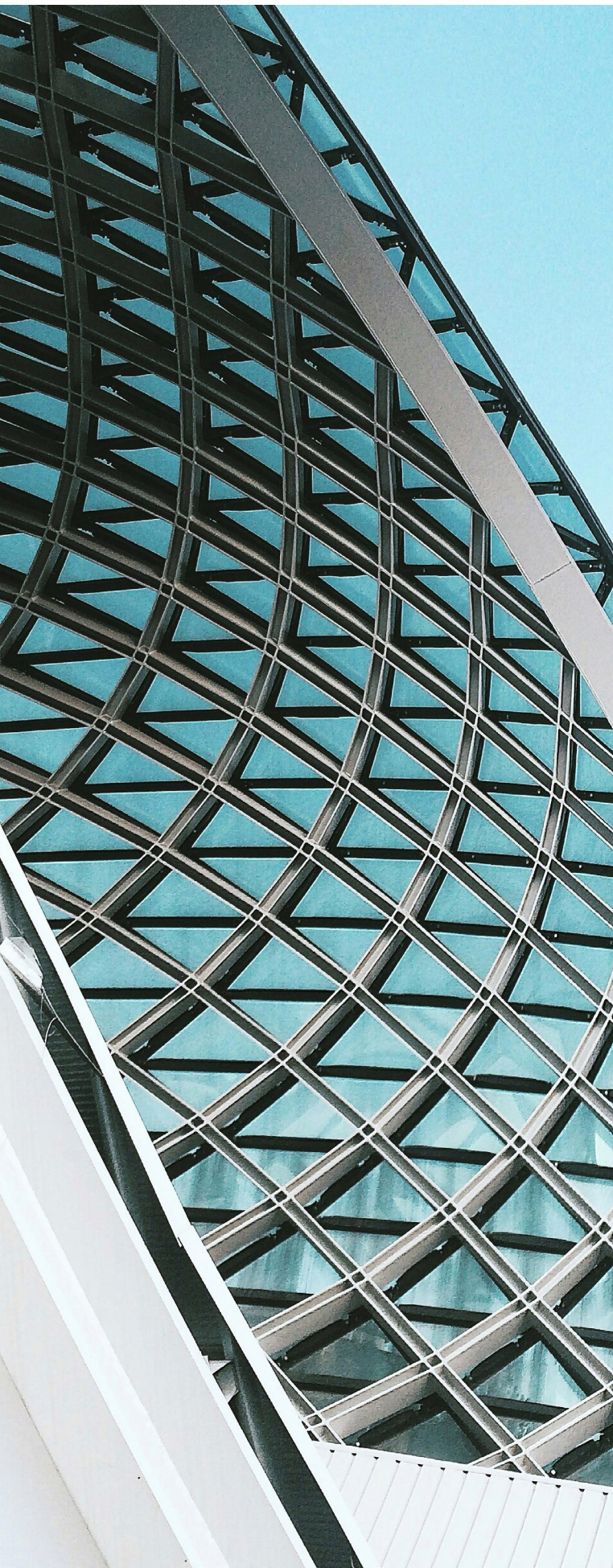
1. **Compliance and safety expertise**, reinforcing the priority placed on risk management and regulatory compliance.
2. **Technical maintenance skills**, recognising the ongoing need for skilled professionals to carry out maintenance.
3. **Digital and IT skills**, reflecting the increasing use of technology driven solutions in FM.
4. **Sustainability and energy management**, aligning with the push for carbon reduction and efficient energy use.
5. **Project management**, indicating the size and complexity of change that is ongoing in the FM sector.

What skills do you think will be most important for the future of Facilities Management? (select up to 3)



With compliance and safety identified as the top priority by respondents, it is unsurprising that expertise in these areas is rated as the most critical skill for the future of the FM industry. However, what stands out is the relatively small difference in response numbers across the top four skill areas.

This could indicate two key possibilities: either these skills are equally essential for the industry's future, or there is a lack of clarity around which should be prioritised. Both scenarios present a challenge for recruitment and training strategies - how should organisations determine which skills to develop first to ensure a resilient and future-ready workforce?



What we do know is that beyond compliance and hard FM skills, technology and sustainability are the key drivers for change in the industry. Both are important and will be critical for organisations if their buildings are going to remain cost effective, compliant and fit for purpose in the future. The question is how organisations get to the point of having the right skillset to optimise these areas to realise the benefits that can come with both technology and energy efficient buildings.

As more organisations adopt technology to manage maintenance, whether that is CAFM systems or IoT sensors, ensuring FM professionals can lever digital tools is critical. This will help organisations save time and money through optimising maintenance, managing resource, and monitoring compliance. This also goes hand in hand with sustainability and energy management, with data critical to both. With technology comes data, and to understand your net zero picture, how you report on that is a key piece of the puzzle. Specialised training in carbon reporting, energy efficient practices, and sustainable procurement are all areas organisations must consider. To meet these growing demands in technology, sustainability and data, upskilling teams must not be forgotten when investing in these areas.

In the next 5 years

SFG20 have identified five key trends that will shape the next five years in FM:

1.



Increased spotlight on compliance with the ongoing developments in the Scottish school scandal, and the final report from the Grenfell Inquiry. This will likely lead to an even greater spotlight placed on competence and compliance in line with the Building Safety Act 2022 and its supporting

legislation. It will be down to those accountable for the building and responsible for maintenance to understand their full obligations to maintain compliance. They must demonstrate they have clear and accurate records of the proper maintenance being undertaken in a timely manner. They will also need to evidence competence through engineers having the necessary skills, knowledge, experience, and behaviours, along with the necessary systems and processes to prove they run a building safe culture.

2.



Data-driven decision-making, will focus on the availability and accuracy of data. There will be an expansion of analytics in FM strategy. With the increased use of technology, there is an abundance of data. How it is captured, securely stored, analysed and used is important to take FM from an analogue to

a digital world. The application of data for decision making has already started in some sectors within the industry and there is a desire to fully utilise the available data to drive organisations forward. One of the biggest cultural challenges will be improving information management and record management in an organisation. Data, both new and historic, must be captured, and a chain of custody created to protect and secure it.

3.



Increased use of advanced analytics to drive efficiency in maintenance and operations. AI is the trending topic across many industries, not just FM. The mass adoption of Chat GPT and similar language models have brought AI to the forefront of people's minds. However, the potential goes far wider than this, with a wide group of advanced analytic techniques that are being used including machine learning, along with AI. The actual adoption and use of AI goes beyond language models and there is a desire to shift to using AI for automation of workflows, predictive maintenance, and enhancing decision making capabilities. AI driven solutions can enable FM teams to map their assets to PPM, identify inefficiencies, predict failures that will be instrumental in helping to optimise maintenance and improve the performance of buildings.

4.



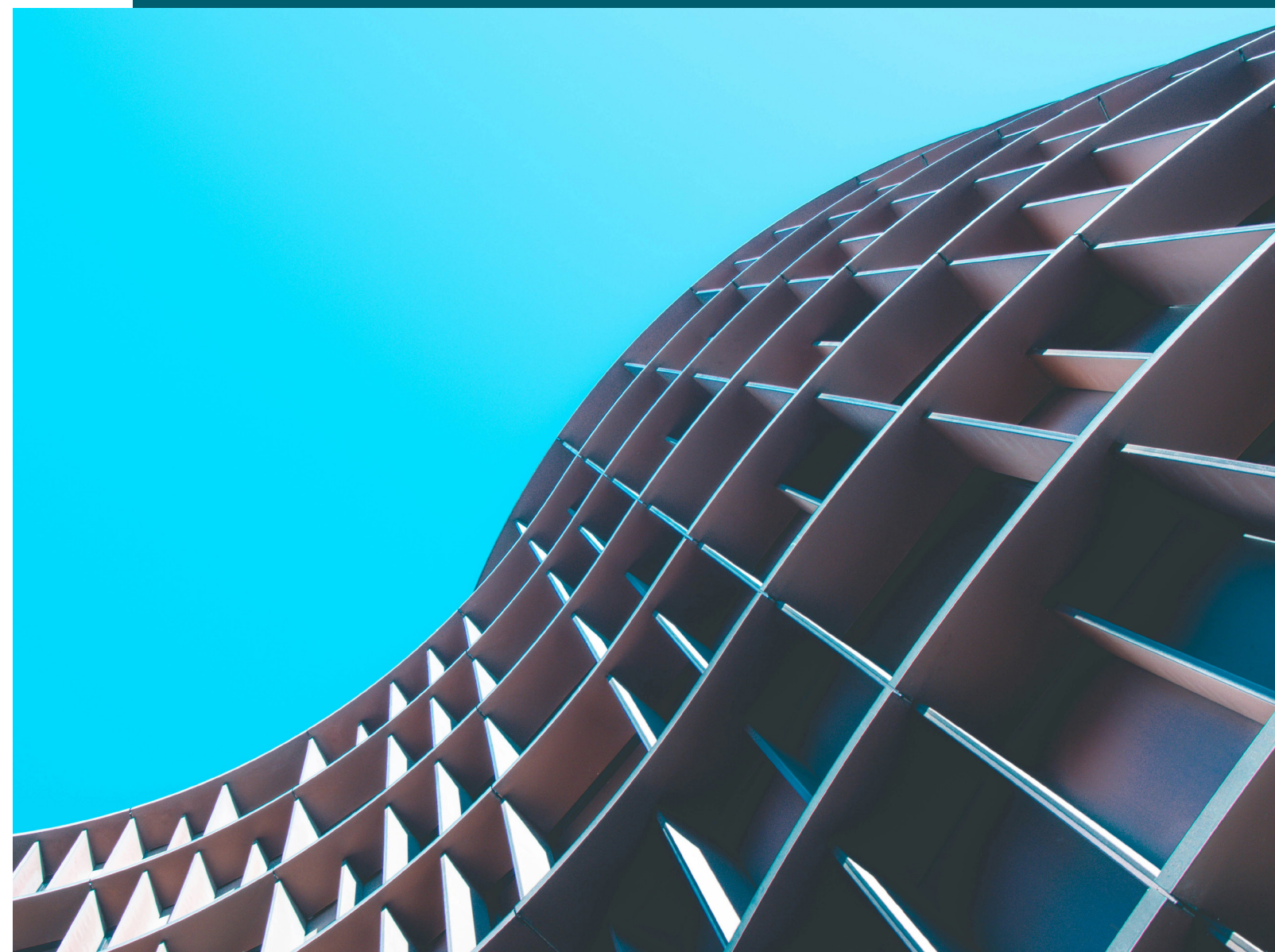
Greater focus on sustainability, to achieve net zero carbon. Buildings account for 40% of global energy consumption and carbon emissions, so FM is at the forefront of the race to net zero carbon. Making buildings more energy efficient and putting in place sustainability best practice will not just reduce emissions

but has the potential to help lower the running costs of buildings. The challenge is how to get started, with this being a key concern among survey respondents. Skills shortages and knowing what data to track to assess progress to net zero is a critical piece of the puzzle for organisations to figure out. Scope 1 Direct Emissions are reduced by removing all fossil fuel heating systems from the building. Once there is no burning of gas or oil, there will be very little likelihood of producing Scope 1 emissions. The replacement heating systems focus on using electricity which drives Scope 2 indirect emission if the electrical generation is through burning of fossil fuels. That can be dealt with by using electricity generated by sustainable sources. We are likely to see the industry move in this direction, also beginning to more widely adopt more sustainable travel, and a focus on local sourcing for both materials and supply chain, reducing Scope 3 emissions.

5.



Remote management of facilities will be more widely adopted, through the use of building automation and continued adaptation to hybrid work models. By implementing digital led maintenance, supported by the use of sensors to undertake remote monitoring, technology will enable more flexibility in how risk and cost is managed in FM. This will need to come with calibration of sensors to ensure that they don't drift from the baseline you are measuring from. With this change, organisations will see benefit in reduction of carbon emissions and maintenance costs due to fewer on site visits.



Methodology & data collection

In assessing the state of the industry, SFG20 put together a survey of 29 questions that focused on understanding the most pressing challenges in the industry, as well as some topics that have become key talking points in the industry, including:

- Artificial intelligence
- Adoption of technology
- Net zero carbon & sustainability
- Asset registers & audits

The survey was designed to gather views from a wide range of FM professionals across multiple sectors. It was structured to balance quantitative metrics and qualitative responses to provide trend analysis and contextual insights.

To ensure the data covered a representative sample of the industry, responses were collected from a diverse range of job titles, experience levels, and sectors. The goal was to develop a data set that reflects the true opportunities and challenges within the sector from both frontline operational teams and senior decision makers.

As a result of gathering this data we can draw conclusions on the current trends in these areas within the industry. The use of quantitative data has led to volume outcomes where we can draw conclusions based on options. In addition, some qualitative data has outlined the key opportunities that exist in the sector, and how the wider governing bodies in the sector can help on the journey to navigating a period of change in facilities management.

To supplement the research findings, we spoke to expert speakers at the SFG20 Summit who provided views on a range of topics relevant to the state of facilities management. Insights from these hand selected experts have been valuable in verifying the data collected, and to gain a 'below surface level insight' into some of the challenges and problems expressed in the data.

Who responded?

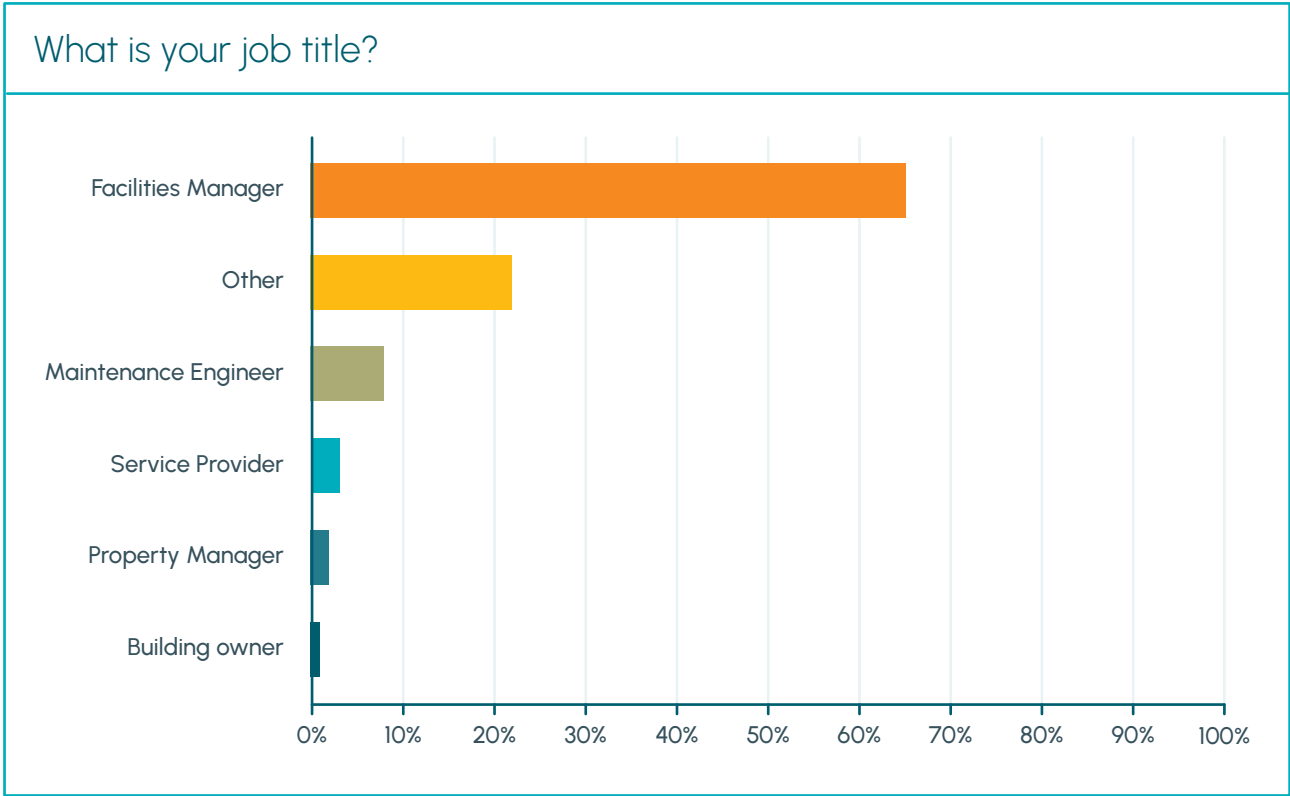
The survey received a total of 190 responses from professionals working across various roles in the built environment sector. The diverse nature of respondents ensure that the data reflects a broad spectrum of FM experiences, making it a valuable dataset for industry wide analysis.

To understand the professional backgrounds of respondents, the survey categorised participants based on their job titles. The largest proportion of responses came from those working directly in facilities management. Key results from this question:

-
- **65%** (124 respondents) identified as working in facilities management, including roles such as Facilities Manager, Facilities Director, Facilities Officer, and Facilities Assistant.
 - The second-largest group was 'Other' (**22%** or 41 respondents). Within this category, respondents specified job titles such as Technical Directors, FM Consultants, ESG/Sustainability Managers, Fire Safety Specialists, and Managing Directors.



Although 22% of respondents were in the 'other' category, the roles have been assessed as relevant to facilities management, providing a level of confidence in the relevance of the insights provided from respondents who selected this option.



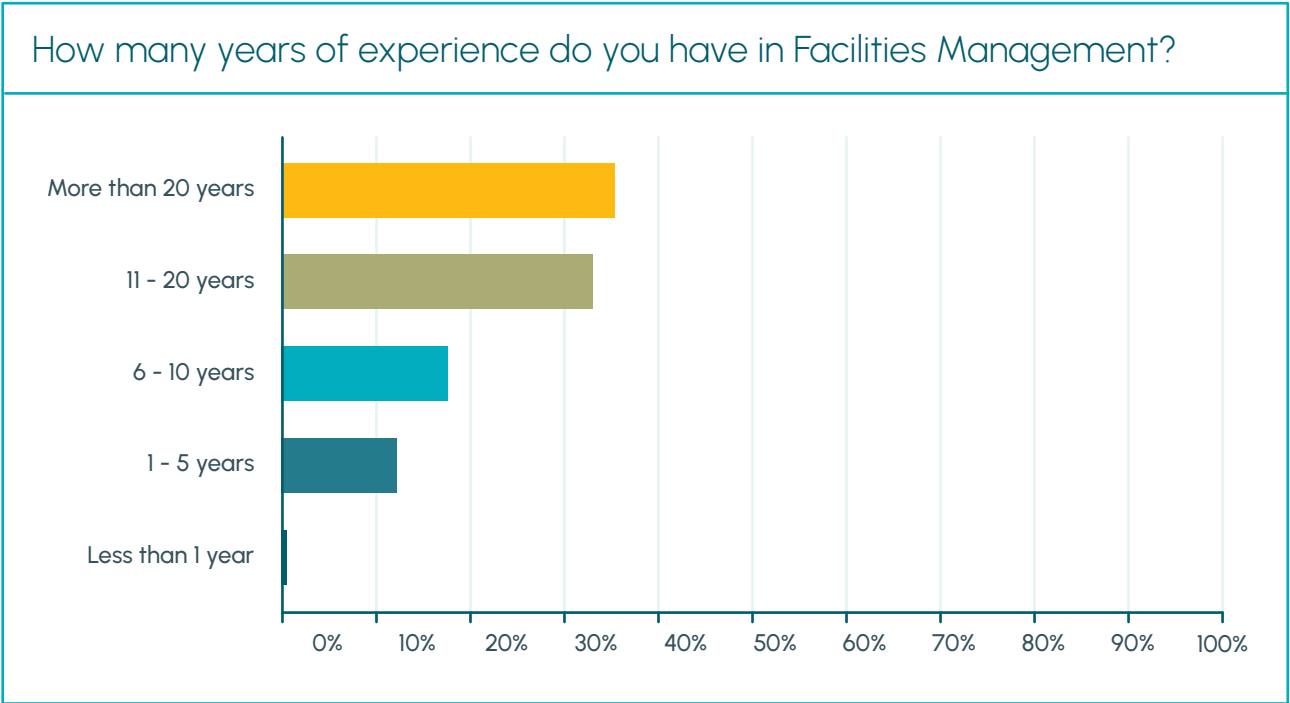
While these job titles vary, they all maintain a close connection to FM operations, particularly in risk management, compliance, sustainability, and digital transformation.

The diverse range of respondents enhances the credibility of the insights gathered, as the survey captures perspectives from professionals involved in day-to-day FM operations as well as strategic decision-making at an executive level.

To gauge the level of industry expertise among respondents, participants were asked how many years they have spent working in facilities management.

The key findings are:

- **68%** (129 respondents) have over 10 years of FM experience
- Only **25** respondents have fewer than 5 years of experience
- **67** respondents have worked in FM for more than 20 years
- Just **one** respondent reported having less than a year of industry experience



The majority of responses were from highly experienced professionals in the industry, reinforcing the reliability of the data captured. The low number of responses from people new to the sector isn't necessarily indicative of the industry being dominated by people who have been working in the sector for years, although response data suggests there is concern over recruitment of new people to the sector. This is something that needs to be thought through in the industry to increase workforce development and improve future recruitment.

Industry sectors

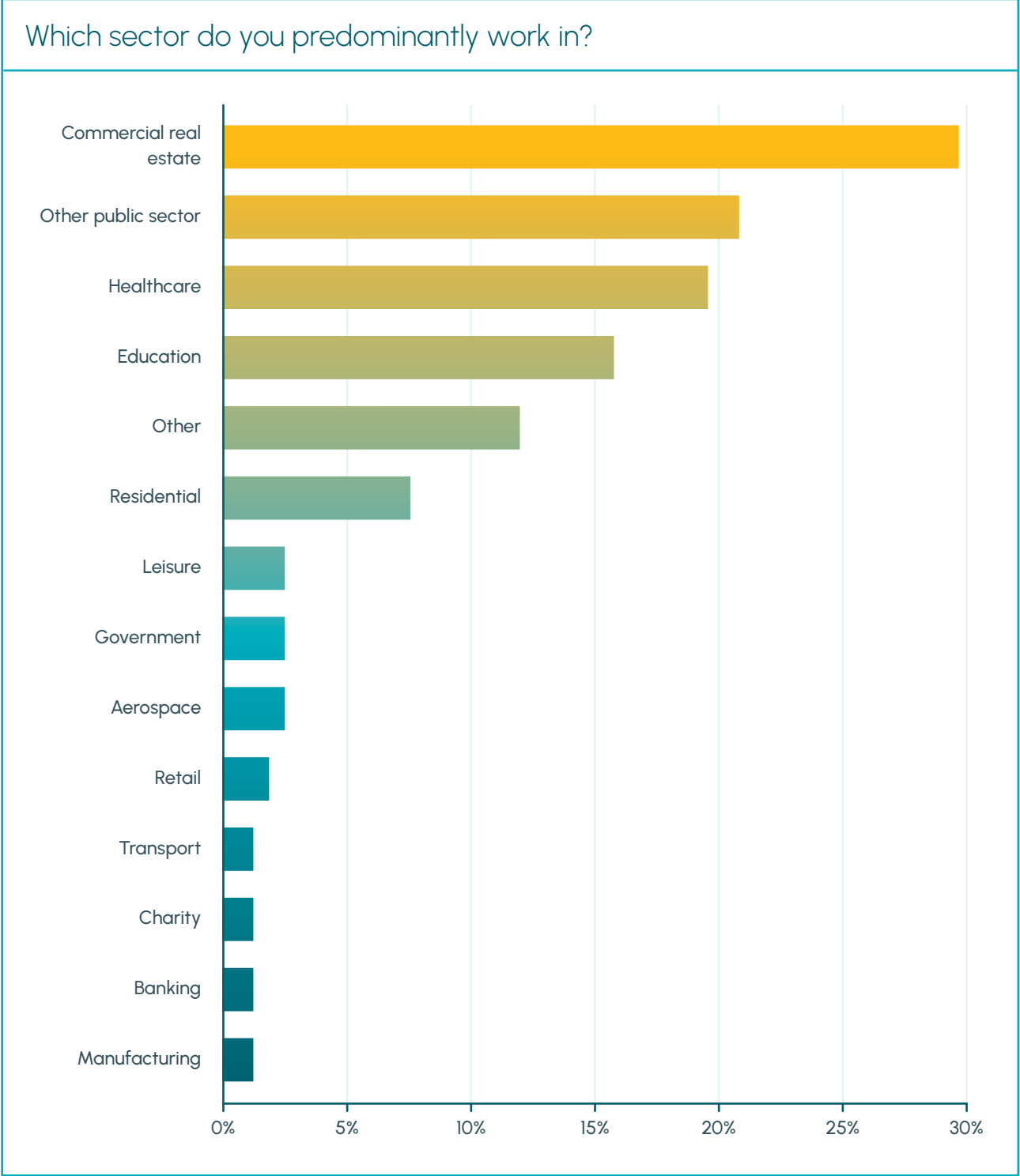
Understanding which industries respondents operate in was a crucial aspect of the survey. Facilities management responsibilities differ significantly by sector, due to complexity and number of buildings, and budget available to ensure effective and compliant maintenance.

The data showed that:

- **25%** (47) of survey respondents work in **commercial real estate**, making it the most represented sector.

➤ The second highest category was **'Public Sector'** which accounted for 33 responses, followed closely by healthcare (31 responses).
- **'Public Sector'** received responses from individuals working in local councils, transport, and consultancies working with a range of public sector clients.

➤ The **'Other'** category (including pharmaceuticals, consulting, and law) further diversified the data set.

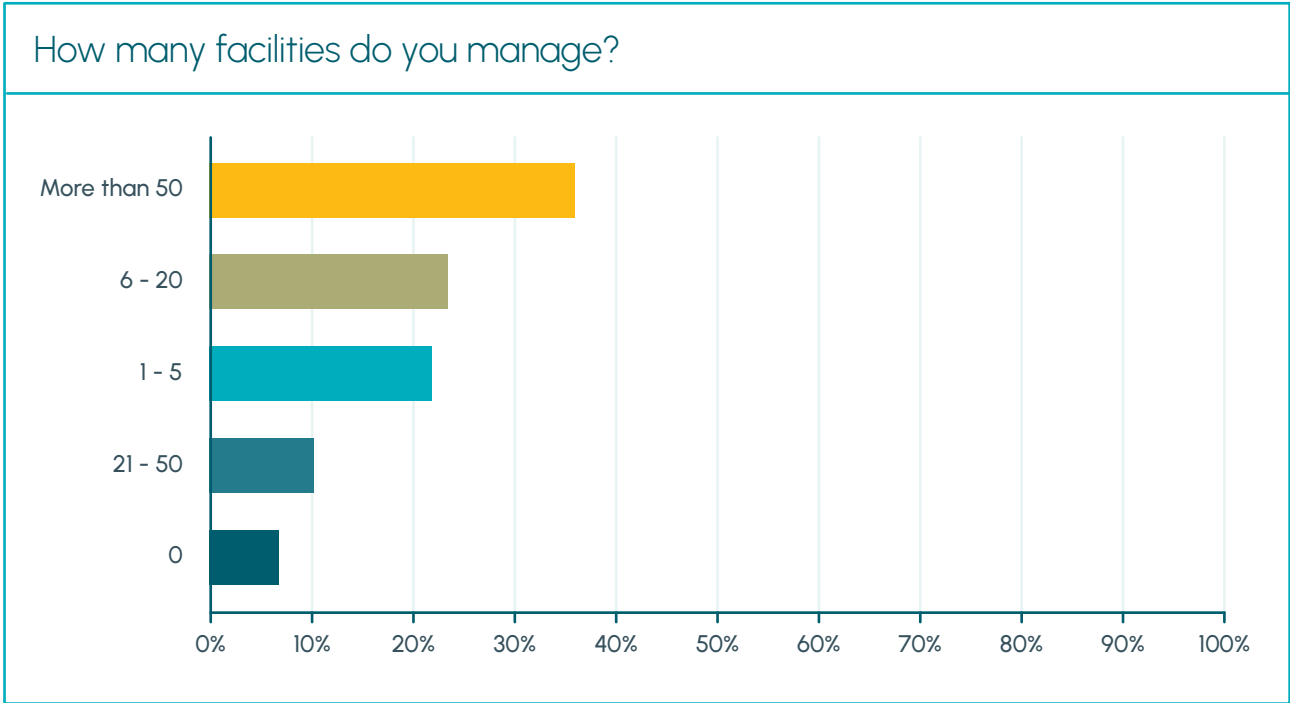


This breakdown ensures that the survey findings reflect a broad range of FM environments, from government buildings and hospitals to office complexes and industrial facilities.

One of the most telling aspects of the demographic section of the survey was the scale and complexity of estate management responsibilities among respondents.

The data showed that:

- **36%** (68 respondents) manage more than 50 facilities
- **10%** (20 respondents) manage over 21 facilities



When managing a large estate efficiently and effectively, there is always a pressure to mitigate inflation and find savings to ensure budgets are not exceeded. Whilst many of the respondents are large client organisations, it is still representative of the wider challenges across the sector.

The adoption of some, if not all, of the trends within the large client organisations will mean that the investment will allow unitary cost to reduce making the innovation more accessible to the wider market.

Progressive governments have tried to use the public sector to drive change and innovation across the wider sector. The view being if it can be demonstrated beneficial in the public sector then the private sector will follow and feel safe in making the investment.

Generally speaking, managing large estates requires consistency across assets, managing multiple suppliers and contractors to carry out the maintenance and a budget that is spread thin. With the majority of survey respondents managing large estates, this has to form part of the context in the results and an understanding that this may have influenced the outcome of specific challenges. It does however highlight the significance of the operational challenges that people working in the FM sector face daily.

By collecting insights from a highly experienced respondent base, across multiple industry sectors, and varied estate sizes, this survey provides an accurate snapshot of the current state of facilities management. The combination of quantitative data and expert qualitative insights ensures that this report delivers a robust understanding of the challenges, opportunities, and evolving trends in FM.



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