



Defining our Future

Defining our Future: Summary of responses



At a glance

8,038

RICS professionals
responded
to the Survey of the Profession

1,001

responded in writing
to the eight
consultation areas

84 further
responses

received
outside the consultation areas

106 round
tables

were attended
across 32 regions

Key Findings

RICS' purpose

Almost **80%** agreed that RICS' purpose under the Charter is still relevant. The most important activities which fulfil our purpose.

- Setting standards for membership and entry
- Setting professional, technical standards and regulating
- Providing professional support

Member engagement and experience

Respondents indicated that they want to **engage with RICS** beyond administrative tasks

- Almost 80% would like further engagement
- But 72% are not sure how to engage
- Members want to feel valued, empowered and supported

Member satisfaction

43% say they are
satisfied with their membership

Top three priorities for at least half of respondents are:

- Standards of conduct
- Technical standards
- Assurance to build trust and confidence

Responses suggest that the most important benefits of being a member are:

- RICS designation, status and recognition
- Professional support and CPD

Members indicated they want to:

- Feel supported in their professional development
- Participate in local, global and surveying activity-based member communities
- A tailored experience based on location and role
- See an improvement in interacting with and contacting RICS
- Understand how membership fees are used

77% of respondents agreed with our strategy of supporting members digitally, highlighting that:

- RICS should be digital-first but not digital only
- We should improve the digital experience

Trust and influence

The average trust score has decreased from 81% in July 2020 to 58% in 2021

95% of respondents agreed with the principles established by Governing Council as to what good governance should look like - but highlighted RICS needs to do more to meet many of these principles

29% said that RICS is quite or very transparent about its financial performance

Access to decision making and strategy were also highlighted as areas that needed greater transparency

The average influence score has decreased from 62% in July 2020 to 49% in 2021

However, **77%** of respondents indicate that **RICS Standards maintain trust among clients and the public**, highlighting the need for:

- Greater support for candidates and members in their professional development
- Ensuring relevance of standards and market adoption

Contents

1. Summary	4
2. Background: About this paper	8
3. Consultation process	9
4. Overview: Purpose of RICS as a professional body	13
5. Overview: Governance and transparency	15
6. Overview: Qualifications and entry	17
7. Overview: Standards and assurance	18
8. Overview: Membership engagement and involvement	21
9. Overview: Member experience	23
10. Overview: Membership value proposition	25
11. Overview: Future priorities for the profession	27
Appendix 1: Demographics from the written responses	29
Appendix 2: Demographics from the Survey of the Profession	30
Appendix 3: Round-table demographics	33

1. Summary

Background

1. The world has changed significantly over the past three years since the last RICS strategy was developed, and particularly in the past 12 months as the COVID-19 pandemic has accelerated many ongoing global structural shifts. This has resulted in changes to markets', members' and the public's expectations of RICS.
2. To ensure that RICS can continue to fulfil its purpose as a professional body effectively, RICS' Governing Council commenced a strategic review of the organisation on 10 February 2021.
3. To support this review, a consultation was launched on 3 March in order to provide a foundation of evidence and insight.

Consultation

4. The formal consultation ran from 3 March to 9 April 2021, gathering insights on the eight key strategic themes identified to support Governing Council in reviewing RICS' strategy.
5. The consultation prompted engagement from RICS members, stakeholders, and enablers such as members of staff, and we are grateful for the time they took to respond and engage in this important work. Engagement included:
 - 8,038 member responses to an online survey as part of the Survey of the Profession
 - 1,001 written responses received across the eight consultation areas
 - 106 round tables attended across 32 different global regions, and
 - 84 responses to the inbox apart from the written responses on the consultation areas.

Next steps

6. This paper provides a summary of the responses received across consultation activities following consideration by Governing Council at its meeting on 18 May. Further sessions of Governing Council will consider how the information received during the consultation should be used to inform RICS' strategy as part of Defining our Future.

Key findings

7. Almost 80% of written respondents, answering the relevant question in the consultation, agreed that our purpose under the Charter – to advance, maintain and promote the usefulness of the profession for the public advantage in the UK and other parts of the world – continues to reflect the role of RICS as a professional body in the 21st century. The findings also show that members value and feel pride in the designation.
8. However, the initial findings from the Survey of the Profession indicate that members perceive RICS is not being as effective at fulfilling its purpose as it could be:
 - fewer than half of respondents (43%) now say they are satisfied with their RICS membership
 - RICS' average trust score among members, taken from the Survey of the Profession, has dropped from 81% in 2020 to 58% in 2021
 - the majority of respondents (52%) believe that RICS is not transparent about the activities supported by member income, and
 - RICS' average influence score, from the Survey of the Profession, has fallen from 62% in 2020 to 49% in 2021.
9. In the initial findings of the Survey of the Profession – and through the verbal and written responses to the consultation – standards, regulation and qualification activities are seen as central to RICS' role as a professional body, and are perceived as performing relatively well. Respondents did however highlight that there is a need to ensure that RICS standards and qualifications remain relevant and are adopted in rapidly changing markets, and that members and candidates feel supported in their professional development.
10. While members support the purpose of the organisation, there appears to be an overall disconnection between the agreed purpose and the strategy being adopted to fulfil it. In particular, the consultation responses suggest key areas where improvements could be made; these cover the themes of:
 - membership engagement and involvement
 - member experience
 - membership value proposition
 - governance and transparency
 - future priorities.

Membership engagement and involvement

11. Many members responding to the written consultation exercise want to engage with RICS beyond administrative tasks but are not clear how to do this, or are frustrated with their experience of engaging with RICS previously. Members want to feel valued, empowered and supported in their engagement.

Member experience

12. Respondents to the consultation indicated that they want an experience with RICS that is tailored to their role and geographic location and responsive to their needs. Respondents also indicated the need for an improved digital user experience.

13. Many respondents noted that they wanted to engage and communicate with RICS locally. A number of participants in the consultation expressed concern over recent changes in the RICS executive structure in their local markets, and felt that this has led to a decrease in the perceived level of support.

Membership value proposition

14. Members want to feel supported in their careers through professional development, access to communities of their peers, and relevant products and services. Their perception of how RICS provides these affects their perception of value.

15. While there are mixed responses on fees generally, members want transparency about how subscriptions are spent, and how this correlates with the value they receive based on region and surveying activity.

Governance and transparency

16. Respondents generally agree with Governing Council's principles of good governance for RICS. However, many considered that RICS is not effective at observing the principle of transparency.

17. In particular, those responding to the written consultation and the Survey of the Profession or attending round tables reflect that RICS needs to be more transparent about the way membership fees are used and its overall finances, including executive remuneration.

Respondents also indicate a desire for greater engagement in decision-making, highlighting a disconnection between the executive, governance and members.

Future priorities

18. Respondents noted that they valued RICS' production of thought leadership, but were not always aware of the outputs. A number of those participating in the consultation highlight that thought leadership needs to be more relevant to members and the challenges they face in their work.
19. Respondents also note that RICS needs to be bolder in its advocacy of major issues in order to advance the profile and influence of the profession.

2. Background: About this paper

20. The world has changed significantly over the three years since the last RICS strategy was developed, and particularly in the past 12 months as the COVID-19 pandemic has accelerated many ongoing global structural shifts. This has resulted in changes to markets', members' and the public's expectations of RICS.
21. To ensure that RICS can continue to fulfil its purpose as a professional body effectively, RICS' Governing Council commenced a strategic review of the organisation on 10 February 2021.
22. At the heart of this review was a consultation exercise designed to build a foundation of evidence and insight from RICS members, enablers and stakeholders. The consultation ran from 3 March to 9 April 2021.
23. This paper provides details on the outputs of that consultation, the process involved, and a summary of the responses across the eight themes, following consideration by Governing Council at its meeting on 18 May. The paper does not cover proposals and actions undertaken based on the findings of this consultation, which are being considered by Governing Council separately.
24. The feedback and insights provided through this consultation exercise will continue to be analysed and inform future thinking outside the immediate development of the Defining our Future strategy.

3. Consultation process

25. In order to support the consultation, RICS produced eight discussion papers covering key themes relating to the operations of a professional body:

- the purpose of RICS as a professional body
- governance and transparency
- qualification and entry to the profession
- standards and assurance
- member engagement and involvement
- membership experience
- membership value proposition, and
- future priorities for the profession.

26. These papers formed the basis of the structured written consultation responses and the round tables.

27. In order to seek views from as many members, stakeholders and enablers during the consultation as possible, RICS provided several ways to engage in the consultation exercise:

- written responses to structured questions
- round tables based on our key themes
- the online Survey of the Profession, and
- a dedicated inbox for direct emails.

28. Concurrent with our consultation exercise, RICS also ran a separate survey of small and medium-sized firms in the UK. The results of that survey have also been considered and reported where relevant.

29. A number of respondents across consultation activities commented on the process for this consultation and review. These comments focused on the timing of the review, and whether or not it should have been undertaken independently.

Survey of the Profession

30. A total of 8,038 members responded to the Survey of the Profession. In line with previous iterations, data was weighted to be representative of members by region and member grade to ensure it was illustrative of the wider membership.
31. The collection and analysis of the Survey of the Profession was undertaken by an independent third party, Savanta ComRes.
32. With a sample size of 8,038, the margin of error on results at a 95 per cent confidence level is ± 1.06 . This means that the Survey of the Profession provides statistically valid information and we can have confidence in the results. We have therefore weighted the outputs from the survey accordingly in our analysis, and where possible, used the other consultation activities to support and understand the sentiment expressed in the initial findings of the Survey of the Profession.
33. At the time of writing, the full, detailed Survey of the Profession report was not available, so this summary reflects the high-level results provided at the time.

Written responses to the consultation

34. Structured questions were posed on each of the eight themes noted above, and members, stakeholders and enablers were invited to respond to these questions through RICS' iConsult platform. A total of 976 responded through this channel. Respondents were also given the option to answer the questions in languages other than English through the inbox; 25 respondents gave views this way, making a total of 1,001 written responses to the consultation themes.
35. The members who responded to the consultation broadly match the demographics of the wider membership. All responses to the consultation have been included and reflected in the analysis, and details of the respondent types across all consultation activities can be found in appendices 1, 2 and 3.
36. The quantitative data from consultation responses was aggregated and reviewed to understand any potential differences in those from different demographics. The qualitative

data was codified based on themes to draw out areas of consistency in responses. The software package NVivo was used to establish the frequency of words and supported the manual codification exercise.

Round tables

37. More than 100 round tables took place during the consultation exercise. The majority of these (87) were with members and stakeholders. However, 19 sessions were held with enablers such as RICS staff.
38. In order to keep the sessions to time, the round tables combined the eight consultation documents that make up Defining our Future into four areas:
 - membership value proposition
 - governance and transparency
 - membership engagement and experience, and
 - maintaining the profession for the public advantage.
39. Where possible, each round table was attended by a member of Governing Council, a regional member of RICS staff, and a member of the consultation support team.
40. Detailed notes were taken during each of the round tables. These were then analysed in a similar way to the qualitative open text in the written responses, by codifying key themes to draw out consistent views, and using software to support this and the overall analysis.
41. Responses from enablers and stakeholders broadly mirrored the comments made by members, so the analysis has been taken in the round. However, a number of round tables featuring RICS staff noted the important benefits of more effective working and collaboration between members and staff. This was also discussed by members during round tables, albeit less frequently; it has not therefore been included in the overall analysis.

Dedicated inbox

42. From 12 February, RICS opened an email inbox to receive free-text comments. The inbox remains open for individuals to provide their views. A total of 84 individual emails were received this way, excluding the 25 pdfs that informed the written responses to the consultation.
43. The responses outlined in the inbox were codified to draw out themes, with NVivo used to support the overall analysis.

Further activities relating to Defining our Future

44. The annual stakeholder survey is due to start at the end of May with the analysis expected by early July. This provides enough time to feed the results of the stakeholder survey into the strategy development process ahead of the November Governing Council meeting.
45. At the time of writing, the initial findings of the Survey of the Profession were used to support this analysis. The full details of that survey will be reflected in future discussions on how this information is used.

4. Overview: Purpose of RICS as a professional body

46. Almost 80% of written respondents answering the relevant question in the consultation, agree that RICS' purpose under the Charter – to secure the advancement and facilitate the acquisition of that knowledge which constitutes the profession of a surveyor, and to maintain and promote the usefulness of the profession for the public advantage in the UK and in any other parts of the world – still reflects the role of RICS as a professional body in the 21st century.

47. The majority (75%) also agreed with the way that purpose is summarised in the [consultation document](#) and what RICS must do to fulfil it (91%).

48. The most important activities recognised by written respondents to fulfil that purpose were noted as:

- setting standards for membership and entry
- setting professional and technical standards, and regulating against them
- providing professional support.

49. While there was broad agreement on the purpose and how RICS should fulfil it, a number of participants in the consultation suggest that there are areas that need further clarity. Respondents also suggest several areas where RICS can improve on fulfilling its purpose, such as providing professional support to members; these are discussed in more detail under the other overviews.

Clarity of purpose

50. A number of those taking part in the consultation discussed the balance between RICS operating in members' interests and the public's interest and whether the two can effectively coexist.

51. A number of consultation participants highlighted that RICS has, in their view, gone too far towards the public interest and not correlated this with the way it supports the profession.

52. Several participants noted that the public interest should be in the interest of the profession and thus the two should coexist, but that RICS should be clearer in communicating this and be more publicly vocal on issues that are close to members.

Globalisation

53. Many participants recognised that RICS has a global role; however, a number of participants in the written responses, roundtables and the Survey of the Profession raised concerns that this global role is often to the detriment of local support and services. This was predominant in responses from the UK, but was also raised by participants in other parts of the world.

54. Several participants in the round tables suggested that more could be done to ensure members and stakeholders understand RICS' global role, the strategy it has for developing globally and the resources required to do so.

Surveying activities

55. Respondents across written and round-table consultation exercises recognised that RICS covers a broad range of surveying activities, and that there are challenges associated with this. While participants referenced pride in the surveying profession and the designation, many felt that their aspect of surveying is not being appropriately recognised or developed.

Commercial focus and support

56. Many respondents to the written consultation, and participants in the round tables, noted that RICS is perceived as pursuing commercial profits rather than supporting its members. A number of participants in the consultation exercise noted that while they understood the need to generate a surplus for a purpose, at times this could be at an additional cost to the members, whom it should instead be supporting.

57. Respondents highlighted that supporting members should have been included, in addition to the three areas of activity listed in a–c ¹ in the consultation document outlining how RICS can fulfil its purpose effectively.

¹ a) Maintains trust and confidence in the profession and itself.

b) maintains its own and the profession's relevance in a fast-changing world, and

c) remains financially secure to maintain RICS for future generations of professional members.

5. Overview: Governance and transparency

58. The majority of respondents (95%) to the written consultation agreed with the principles established by Governing Council as to what good governance should look like for RICS.

59. Some respondents to the written consultation considered that RICS is somewhat meeting a number of those principles; in particular, 62% noted that it is professional. However, 50% of those responding to the written consultation considered that RICS is not observing the principle of transparency. This was further reflected in feedback from the Survey of the Profession and participants in roundtables.

Finance and fees

60. Areas relating to finance and fees were considered to be the least transparent in the Survey of the Profession. Only 28% of respondents said that RICS is quite or very transparent in respect to the activities supported by member income, and only 29% said that RICS is quite or very transparent on its financial performance.

61. Similar views on transparency were found in the written responses to the consultation, with only 9% of respondents saying they had sufficient information about the way membership subscriptions are spent. This was also supported in round tables, where understanding the way member fees are spent, both locally and globally, was one of the key points of discussion.

Decision-making

62. Access to decision-making and strategy were also highlighted in the round tables and written responses as areas that need greater transparency in order to build trust. This was supported by the Survey of Profession, which noted that fewer than half of members felt that RICS is quite or very transparent in respect to performance, strategy and fulfilling the strategy.

63. Responses to the consultation and participants in round tables also noted concern and confusion with governance structures and decision-making. Some suggested there was a disconnection between members, governance and the executive. A number of responses to

the consultation and round tables also noted that they did not feel the organisation, and in particular the executive, is being held to account effectively. Respondents to the written consultation and round tables also noted concern about the way senior executives are paid and the need for greater transparency and accountability in remuneration and the appointment of executives and non-executives.

64. Several responses discussed whether additional oversight of RICS' public interest functions is required in the organisation's governance structure in order to maintain trust and accountability.

Consultation and communication

65. A number of responses noted that RICS does provide information relating to governance; however, they did not feel that this information is provided in an accessible way. Many agreed that RICS needs to improve the way information is presented and communicated to members and ensure it is accessible and targeted. Participants in round tables and written respondents suggested this would improve transparency and also help members feel more engaged.

66. A number of responses also discussed the need to feel consulted and communicated with on key strategy and business issues, in order to improve transparency and accountability.

6. Overview: Qualifications and entry

67. Maintaining consistency and confidence in the assessment was highlighted in round tables and the written responses as being one of the most important roles of RICS. The Survey of the Profession's initial findings indicate that respondents believe RICS is relatively good at maintaining professional qualifications and standards in the chartered surveying profession, scoring 6.7 out of 10, compared to other activities. This is supported by feedback from the round tables.
68. However, there is clearly an opportunity to increase this score, and a number of comments made in the written responses to the consultation and round tables suggest a number areas where improvements can be made.

Candidate support and assessment

69. A number of respondents to the consultation, as well as feedback from round tables, suggested there is more that RICS can do to support candidates. This was particularly true for comments from outside of the UK, where there is considered to be less support from employers, peers and access to counsellors.
70. A number of respondents noted that more support is also needed for firms and counsellors, and that firms and counsellors need to play a greater role in the assurance and support process.
71. Some respondents mentioned that modular learning and assessment might improve the current experience of candidates. Participants in round tables and written responses also discussed the need to ensure the consistency of assessments globally in order to maintain standards.

Membership categories

72. A number of participants in the written responses and during round tables discussed different categories of membership and their impact on the profession. Some perceived that AssocRICS

status dilutes the wider chartered offering and confuses consumers, while others thought it is an important gateway into the profession. Some round-table participants suggested that a different category of membership or credential is needed in areas such as UK residential estate agency, where Associate or Chartered status may not be accessible.

73. The majority of respondents in the written responses noted that the current progression route between AssocRICS and MRICS needs to be improved to better define the relevance and status of membership grades, offering a demarcated pathway through each.

Next generation and education providers

74. A number of respondents, particularly in the round tables, noted that RICS needs to ensure that the profession is valued by and desirable to the next generation. It was felt that not enough is being done to support a sustainable and diverse pipeline of future professionals.
75. During round tables, some considered that part of the problem is that the relationship and communication between RICS and higher education institutions needs improving, and more courses need to be accredited.

Pathways, competencies and relevance

76. Most written respondents answering the relevant questions in the consultation believed that the current assessment provides trust and confidence, and that the existing pathways reflect current practice. However, the qualitative responses conflicted with this, suggesting that the current pathways are unnecessarily complex and could force candidates to specialise too narrowly too early. Some responses in the round tables noted that the qualification needs to keep pace in a rapidly changing world in order to maintain relevance.

7. Overview: Standards and assurance

77. Written responses to the consultation and feedback from the survey of the profession suggest that respondents believe standards and assurance are one of the most important activities in which RICS is involved. Respondents also note that this is an area where they believe RICS is

performing relatively well – 77% of individuals responding to the relevant question in written responses suggest that RICS standards maintain trust among clients and the public, while the Survey of the Profession indicates that respondents believe RICS performs well in providing standards and regulation.

78. However, there were several areas identified by respondents as areas that could be improved.

Support

79. A consistent theme across the consultation is the need for greater support of members in meeting standards and RICS requirements.

80. Out of 774 written responses, 642 highlighted that we can better support members through guidance and best-practice documents. This was supported by feedback from the round tables, where participants discussed the need for accessing practical guidance and support materials.

81. Many respondents across the written consultation and round tables commented on the need for free and low-cost training and education on new standards and guidance as the best way for RICS to support them in their professional development. They noted that RICS sets requirements in relation to CPD, but does not always provide adequate ways to meet these requirements.

Adoption

82. While many suggested RICS' standards maintain trust in the profession, it was noted across written responses and round tables that more work is needed to ensure standards are understood and adopted by clients and other stakeholders. This was particularly true for respondents outside the UK, who highlighted that international clients generally understood RICS standards and assurance; however, with local clients this was much less likely.

83. A number of respondents also noted that RICS needs to undertake more work in ensuring that the public and the government understand the role of our standards and assurance, and why RICS members can be trusted. Examples were provided of campaigns run by other professional

bodies, including the Society of Chartered Surveyors Ireland (SCSI).

Visibility

84. A number of respondents to the consultation exercise highlighted that RICS could be more visible in its regulation of members, which would help improve understanding and recognition of RICS' regulatory role. This was particularly noted by respondents outside the UK.

85. Responses across written submissions and round tables also noted the need to communicate to members the benefits of being regulated, and communicate to clients and the public the benefits of using a regulated firm.

CPD framework

86. Many respondents to the written consultation, and participants in the round tables, noted concern with the current CPD framework. Some suggested it does not effectively maintain competence over time and acts as a tick-box exercise; others suggested the experience of recording CPD could be improved.

87. Out of 766 responses in the written consultation, 689 agreed that RICS should move to making CPD a positive aspect of members' professionalism, targeted at their role and learning needs.

8. Overview: Membership engagement and involvement

88. It is clear from written responses to the consultation that members want to engage with RICS beyond administrative tasks, with almost 80% responding positively to further engagement. However, many members (72%) are not sure how to engage, and feedback from the written responses and round tables suggests that many of those who are engaged are frustrated.

Develop communities

89. Feedback from written responses and round tables identified that members would like to engage at a local level. However, many of those who are currently engaged, or have been previously, note their frustrations at a lack of resources and support. These frustrations were echoed by other engaged members involved in other types of community, such as Matrics.

90. Round-table participants and written respondents also noted that members often find it difficult to get their voices heard, and when they do engage they do not get feedback on how their contribution is used.

91. Several round-table participants highlighted that more could be done to connect members globally to share information and experiences and make use of RICS' international presence.

92. A number of written responses and participants in round tables also highlighted that the withdrawal from professional groups has led to a loss of engagement across surveying disciplines.

Relevant and targeted communications

93. Round-table participants and written respondents highlighted that the communications they receive are not always targeted by their location or sector, which meant they were less inclined to engage with RICS. Many noted that this could be significantly improved by tailoring communications to their needs.

Digital-first, not only

94. Written responses to the consultation and round-table participants broadly supported digital engagement with RICS, with 77% of 942 respondents agreeing with our strategy of supporting all members this way. However, many respondents noted that the strategy should not be digital only, and that it is important to continue having face-to-face interactions, particularly for events and networking.

9. Overview: Member experience

95. Fewer than a third of written respondents to the questionnaire expressed satisfaction with the experience they receive from RICS. The least-satisfactory experiences identified in the written responses were:

- using the website
- calling the Contact Centre, and
- emailing the Contact Centre.

96. These activities were also those cited in the feedback from round tables.

Tailored digital experience

97. While many of the respondents to the written consultation and participants in round tables recognised the benefits of moving towards digital provision, many highlighted that the current digital experience offered by RICS is inadequate.

98. When commenting further on this, respondents highlighted that the lack of an effective and functional website, with limited personalisation, has led to a frustrating user experience. This concern with limited personalisation was matched in responses on the topic of digital communications, with respondents feeling that emails received do not effectively reflect their interests or geographic location. Feedback from round tables also highlighted issues of navigation and reliability.

Responding to queries

99. The most frequently discussed item on member experience in the round tables was on slow response times from the RICS Contact Centre and the lack of effective resolution or local support.

100. A number of responses noted that RICS needs to be more transparent in the way it responds to and deals with queries in order to build trust.

Commercial activities

101. Several participants during the round tables highlighted concerns over the number of emails received in relation to commercial activities and that this meant they engage less with RICS. Others noted that they had a valuable experience with RICS products and services, but were concerned with having to pay for them in addition to the existing membership fee.

102. However, 72% of 946 respondents in the written consultation supported RICS' provision of high-quality, paid-for training in combination with low-cost options.

10. Overview: Membership value proposition

103. The Survey of the Profession indicates that overall satisfaction has declined significantly since the last survey in July 2020. Fewer than half the respondents (43%) reported that they are satisfied with their RICS membership; this is a 20-percentage-point drop from 63% in July 2020, and represents an historic low. While members in the UK and Ireland continue to be the least satisfied, there have been significant drops across all regions.
104. Feedback from round tables and written consultation responses also reflected this sentiment, with concern over membership value and broader value for money. Written responses suggest that improving the value proposition will also help to improve satisfaction.
105. Responses provided from round tables and in writing suggest that the most important benefit of being a member of RICS is the designation and recognition, followed by professional support, professional standards and CPD. The consultation responses also identified areas where greater value can be added.

Support

106. It is clear from across the data that members want and value more support, and that respondents' perception is that RICS is not performing well in providing it.
107. Providing access to low-cost or free CPD and products such as iSurv, was identified as one of the most important things RICS could do to increase membership value in the written responses; it also featured in round tables and inbox responses. In particular, many respondents noted that having the access to free products and learning in 2020 as a result of COVID-19 was a considerable benefit. This view is supported by the uplift in satisfaction in the previous Survey of the Profession from 2020.
108. While standards were relatively well valued across the consultation, respondents noted that greater focus is needed on supporting members and SMEs in professional and technical activities. This was also true of RICS' thought leadership: many respondents and participants noted that they value this, but said it needs to be relevant in order to empower members to be

thought leaders in their businesses and communities.

109. A number of written responses to the consultation raised concerns over the level of local support and resources following RICS' recent restructure. Many perceived that global expansion, and the challenges of supporting a global profession and operations, has reduced the amount of resources available to support members locally.

Networking and communities

110. The written responses rated improving networking as second highest in terms of ways to provide greater value. Although networking was not rated as highly as other areas of support in the Survey of the Profession, respondents noted that it is something they perceived RICS does not support well.

111. While much of the feedback received discussed local networking, many noted the importance and value of developing global communities, and the need to make it easier for members to connect around the world. Feedback from across respondents also noted that networking is needed across surveying activities as well as geographies.

Fee structure

112. In discussions on fee structure, some noted that fees are too high, and others that the level is appropriate but that they wanted greater value. A number of comments said it is not clear how fees are set, either generally or specifically to them. It was suggested that if there were greater transparency on fees, members might understand the value more clearly.

113. Participants in round tables and the consultation responses noted that Fellows paid a higher fee than members without any discernible benefit. Many noted that RICS should be encouraging members to become Fellows, rather than treating this as an opportunity to increase fees.

114. Many respondents agreed that there needs to be transparency on value, and an understanding of the benefits members receive for their fee so they could properly assess value. This was highlighted by those members who have to pay the fees themselves rather than through their business, and who are therefore more conscious of cost compared to value.

11. Overview: Future priorities for the profession

115. Written responses and feedback from round tables indicate that many respondents and participants valued thought leadership and that it was seen as a differentiator between RICS and other professional bodies. However, only 253 out of 711 written responses to the consultation noted that they understood RICS' thought leadership activities, and only 177 out of 699 thought that RICS provides enough understanding of future strategic priorities that will affect the profession in the medium and longer term.
116. Many respondents to the written consultation and round-table participants highlighted that there is a disconnection between RICS' thought leadership, the work of members, and the value that it provides.
117. RICS' average influence score, from the Survey of the Profession, has also fallen from 62% in 2020 to 49% in 2021.

Communication

118. Written responses to the consultation and round tables stated that there is a need to improve the communication of thought leadership activities, so members know and understand what RICS is doing and how it supports them.

Thought leadership priorities

119. The two themes chosen by respondents on the consultation papers as priority areas for RICS thought leadership over the coming years were sustainability (551 of 793 respondents) and data and technology (503 of 793 respondents). This is supported by feedback from round tables. It was noted during the consultation that a number of RICS campaigns are already dealing with these areas, but that there was a perception that they are not always followed through.
120. Respondents to the consultation and participants at round tables also noted that RICS needed to be much more active in these areas and bolder in its ambitions if it is to remain relevant. They also noted that these are global issues, and that RICS should better leverage its global position, and membership, to deal with them.

Member involvement

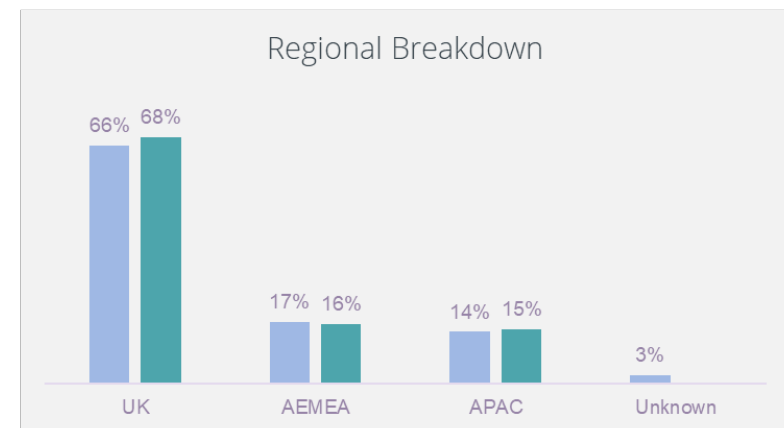
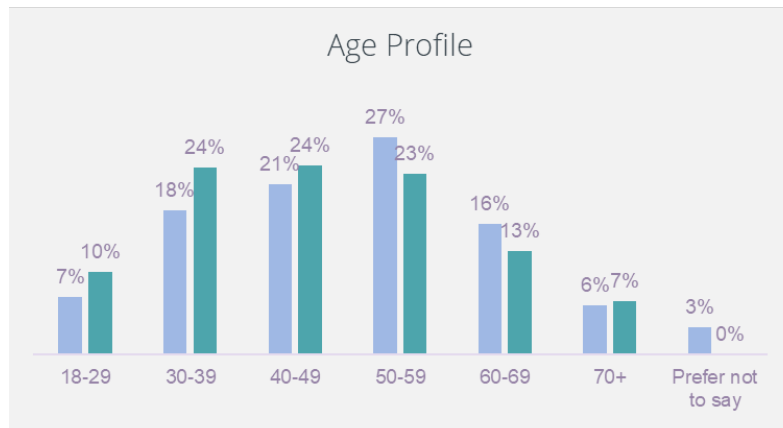
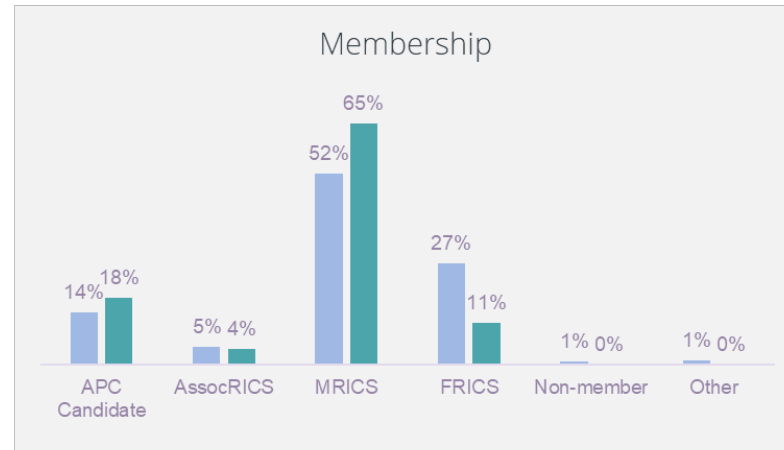
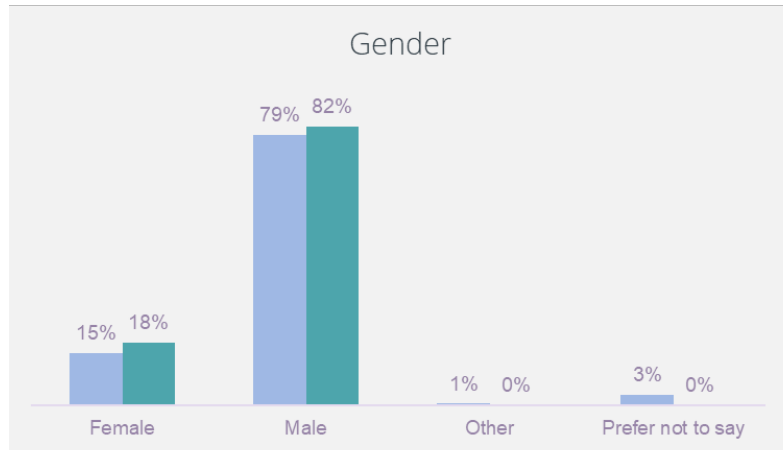
121. The majority of members responding to the written consultation noted that they didn't believe, or didn't know, whether RICS makes sufficient use of the expertise and experience of the profession to inform its strategic priorities. Only 173 written respondents out of 694 agreed that RICS makes sufficient use of experience from the profession.
122. Qualitative comments noted that RICS needs to recognise the skills that are available in the professional community, using these and the diversity of that community, to challenge existing thought and to innovate. Round-table participants also noted that member involvement would help improve the practical application and transposition of thought leadership into their working lives – allowing members to become thought leaders in their communities.

Advocacy

123. Under the theme of purpose, 76% of 949 respondents believed that RICS could be bolder in advocating the profession for the public advantage. This was reflected in discussion in round tables, where a number of participants suggested that RICS needs to be more visible on key issues to raise the profession's profile and influence.

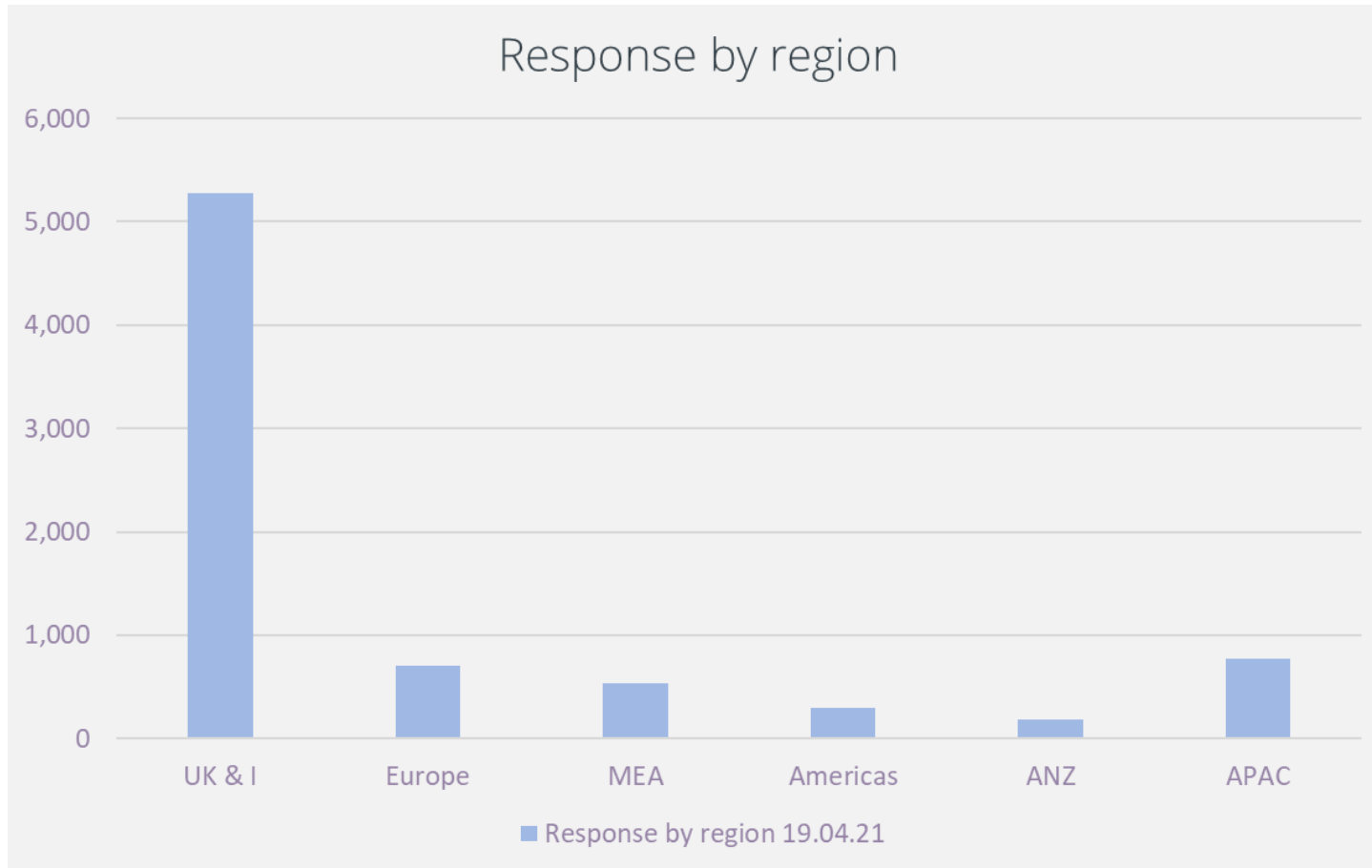
Appendix 1: Demographics from the written responses

■ Consultation Written Response Profile
 ■ Total Membership Profile



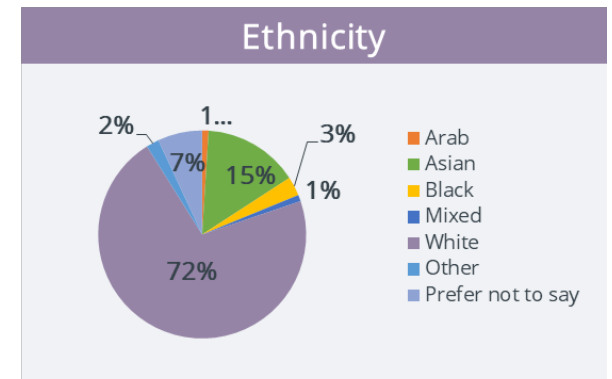
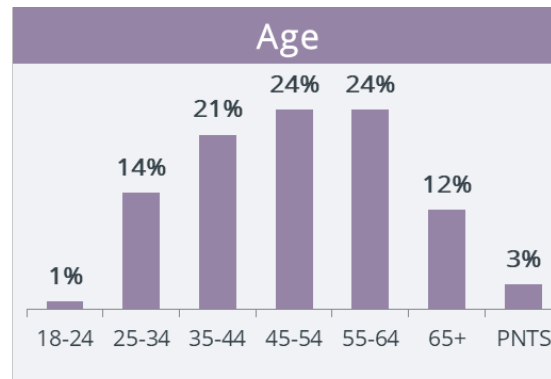
Define the Future Survey Base: n=1002; Total Membership Base: n=122,227
 Membership Profile Source: Subs Reporting Operational Summary 2021 and BOARD

Appendix 2: Demographics from the Survey of the Profession

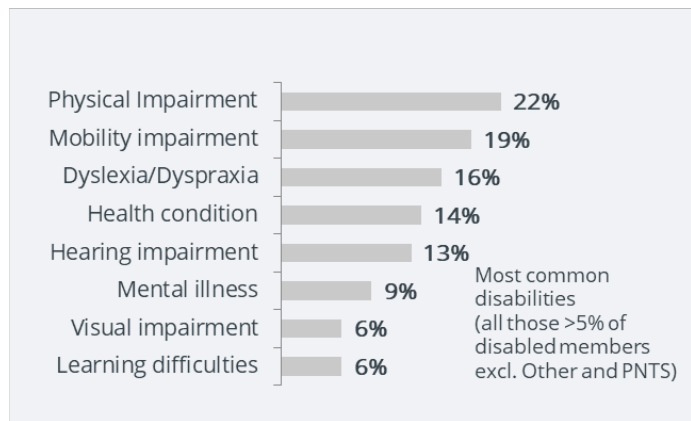


Gender		
Female	Male	PNTS*
18%	78%	4%

Gender identity same as assigned at birth		
Yes	No	PNTS*
95%	<1%	5%



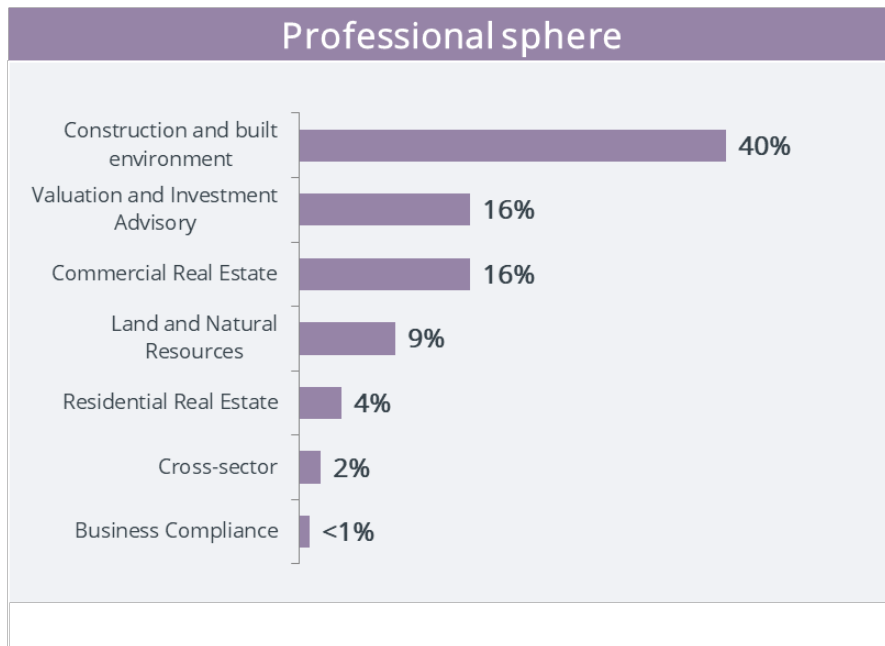
Disability		
Yes	No	PNTS
2%	94%	4%



Sexual orientation	
Heterosexual/Straight	83%
Bisexual	1%
Gay man	1%
Gay woman/Lesbian	<1%
Prefer to self describe	1%
PNTS	13%

Religion/beliefs	
Christian	47%
None	12%
Atheist	9%
Agnostic	8%
Hindu	4%
Muslim	2%
Buddhist	2%
Other	1%
Jewish	1%
Sikh	<1%
PNTS	13%

Membership length						
Years						
<1	1-3	4-5	6-9	10-19	20+	PNTS*
9%	15%	8%	10%	17%	39%	3%

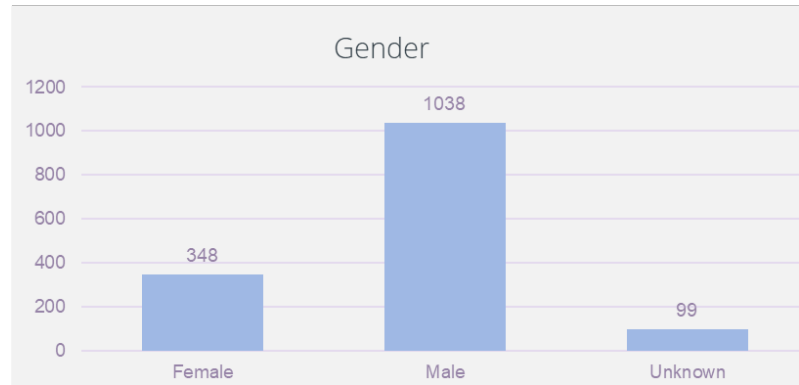
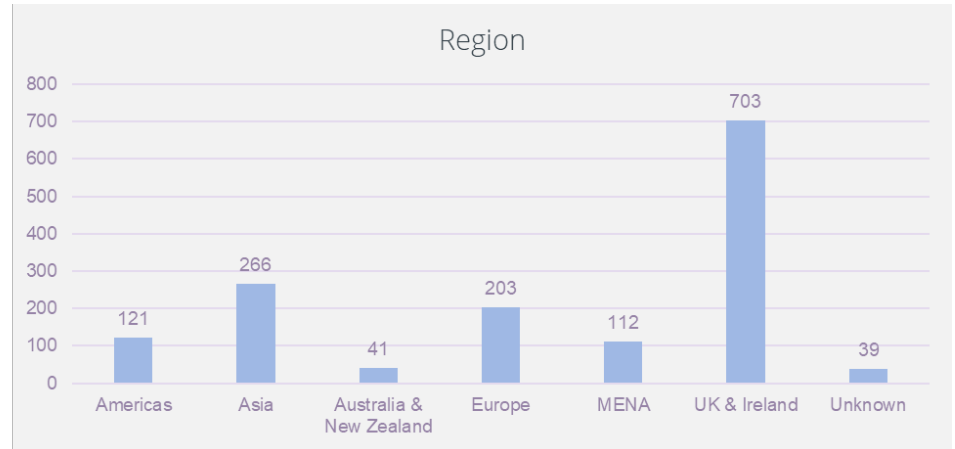
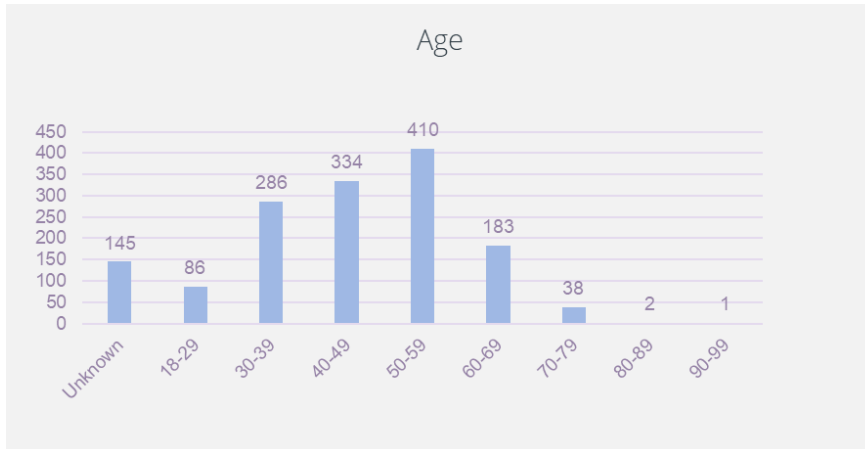


Public/private sector	
Private Sector	80%
Public Sector	19%



Private sector organisation size	
Very large organisation (more than 1000 employees)	29%
Large organisation (250-999 employees)	11%
Medium organisation (50-249 employees)	15%
Small organisation (10-49 employees)	15%
Very small organisation (2-9 employees)	18%
Sole trader	11%

Appendix 3: Round-table demographics



Professional groups

