

1	1	Savills	399.1	352.3	13.3	145.7	December 2012	37.3	33.7
2	2	Jones Lang LaSalle	325	335.6	-3.2	n/a	01 December 2012	N/A	N/A
3	3	CBRE	247	236	4.7	N/A	31 December 2012	N/A	N/A
4	4	Knight Frank	200.3	192.3	4.2	N/A	01 March 2013	N/A	N/A
5	8	Delotite Real Estate	129.7	86	50.8	N/A	05 December 2013	N/A	N/A
6	6	GVA	120	117	2.6	0	01 April 2013	N/A	N/a
7	7	Cushman & Wakefield	110	107.6	2.2	0	01 December 2012	N/A	N/A
8	9	Strutt & Parker	83.6	81.9	2.1	36.6	30 April 2013	N/A	80.7
9	10	Capita Symonds	78.4	71.6	9.5	3.9	31 December 2012	6.3	3.6
10	12	Colliers International Property Advisers	67	61.5	8.9	0.43	01 December 2012	N/A	N/A
11	13	BNP Paribas Real Estate	64.2	61.2	4.9	0	31 December 2012	N/A	N/A
12	11	Lambert Smith Hampton	62.8	62.2	1.0	n/a	01 March 2013	N/A	N/A
13	15	Gerald Eve	38	34.5	10.1	2	05 April 2013	N/A	7.3
14	14	Cluttons	36.9	38.7	-4.7	15	01 March 2013	N/A	N/A
15	17	Carter Jonas	34.2	32.6	4.9	N/A	01 April 2013	6.7	N/A
16	16	Allsop	33.1	34.3	-3.5	16.6	31 March 2013	N/A	11.6
17	18	Bidwells	32.5	32.1	1.2	4.8	01 December 2012	7.9	5.1
18	19	Montagu Evans	27.5	26	5.8	2.1	31 March 2013	11	10.3
19	20	GL Hearn	22	20.3	8.4	2.4	01 May 2013	4.1	2.5
20	21	Edward Symmons	20.6	20.1	2.5	1.5	01 April 2013	3.6	3.5
21	23	Eddisons	15.8	14.6	8.2	0	01 March 2013	N/A	N/A
22	29	CVS Commercial Valuers & Surveyors	14.6	10.4	40.4	0	12 December 2013	1	0
23	22	Sanderson	13.1	14.7	10.0	0.1	31 March	0.0	0.25

23	22	Weatherall	13.1	14.7	-10.9	0.4	2013	0.2	0.35
24	24	M J Mapp	11.4	12.3	-7.3	0	30 April 2013	1.4	1.4
25	27	Ryden	11.3	10.7	5.6	0	30 April 2013	N/A	N/A
26	26	Goadsby Group	11	11	0.0	8	01 June 2012	0.3	0.9
27	30	Aitchison Raffety	9.5	9.7	-2.1	0	31 September 2012	0.1	0.01
28	31	Rapleys	8.9	9	-1.1	0	30 April 2012	2.9	1.4
29	N/A	Matthews & Goodman	7.4	7.1	4.2	0.7	01 April 2013	1.3	1.2
30	34	Strettons	7	7	0.0	1.49	01 April 2013	0.23	0.12
31	35	Dacre Son & Hartley	6.6	6.5	1.5	3.7	01 October 2012	0	0.06
32	36	Briant Champion Long	5.8	6.4	-9.4	0	31 March 2013	N/A	N/A
33	37	Beauchamp Estates (Mayfair)	5.3	6	-11.7	5	31 March 2013	4.8	1.69
34	33	Mason Owen	4.9	7.1	-31.0	0	01 June 2012	N/A	N/a
35	40	Hartnell Taylor Cook	4.8	4.7	2.1	0	01 April 2012	1.2	1.3
36	39	Fleurets	4.6	5	-8.0	0	01 September 2012	N/A	N/A
37	42	Mason Partners	4.4	4.2	4.8	0	01 June 2012	0	0
38	41	Caxtons	4.2	4.2	0.0	0	01 June 2012	0.2	0.24
39	44	Speirs Gumley	3.9	3.6	8.3	2.5	01 April 2013	0.65	0.65
40	45	Innes England	3.66	3.5	4.6	0	01 December 2012	N/A	N/A
41	43	F G Burnett	3.5	3.8	-7.9	0	01 April 2013	N/A	N/A
42	N/A	James Andrew International	3.5	3.3	6.1	0	01 September 2012	N/A	N/A
43	46	Lamberts	2.8	2.9	-3.4	1.4	01 February 2013	N/A	N/A
44	47	Dron & Wright	3	3	-10.3	0	01 December 2012	0.17	0.57
45	50	Vickery Holman	2.2	2.1	4.8	0.45	01 June 2012	0.02	0.03
46	51	Johnson Fellows & Co	2	2	0.0	0	01 May 2013	N/A	N/A
47	48	Kempster	2	2	0.1	0	01 April	N/A	N/A

47	49	Kennisley	2	2	-9.1	0	2013	N/A	N/A
48	53	Roger Hannah & Co	2	1.9	5.3	0.1	01 March 2013	0.4	0.23
49	54	Barker Storey Matthews	1.9	1.8	5.6	0	31 March 2012	0.6	0.46
50	55	Brown & Lee Chartered Surveyors	1.6	1.8	-11.1	0	01 April 2013	N/A	N/A
51	57	Graves Son & Pilcher	1.32	1.5	-12.0	N/A	01 March 2012	0.54	0.55
52	58	Robert Pinkus & Co	1.3	1.5	-13.3	0	01 March 2013	0.5	0.6
53	60	Underwoods	1.2	1	20.0	0.14	31 March 2013 (9 months)	0.22	0.44
54	59	Chase & Partners	1	1	0.0	0	01 March 2013	0	0
55	N/A	J Peiser Wainwright	0.6	0.58	3.4	0.1	01 April 2013	0.1	0.1
56	N/A	Olivejoyce	0.1	New start-up	N/A	0.04	01 March 2013	N/A	N/A

DTZ declined to submit its UK turnover figures this year, following its takeover by Australian services firm UGL in December 2011. It no longer breaks down turnover by country but by region only. See European and Global tables overleaf for these figures.

*Deloitte Real Estate's figures now include all departments that deal exclusively with real estate and receive fees from real estate customers — transactions, planning and development, tax advisory, management and valuation, accounting and audit, construction advisory and occupier advisory.

**Underwoods turnover projected for last three months Key to abbreviations: EBITDA = earnings before interest, taxation, depreciation and amortisation; LC = limited company; LLP = limited liability partnership; P = partnership; PLC = public limited company

Comments from the participants

Our primary revenue is from valuation work and the main concern for our business is the rise in price of private indemnity insurance. We and our competitors have spent three or four years absorbing the increased costs, which has impacted our profitability, but that will have to be passed on to clients.

Chris Roberts, managing director, Lamberts

There have been lots of ups and downs in starting up in this market. You have to adapt your business to provide exactly what clients want and that is often a slimmed-down, quick-response but bespoke service that means you need to get on site and turn any reports around quickly.

David McMullan, director, Olivejoyce

The market seems to have picked up since the new year, whereas last year it seemed to have been in fits and starts, where there would be a few positive signs for a couple of months and then flat again. It does seem to be a case of slightly easier trading conditions now, however, and hopefully it will stay that way.

Simon Cook, director, Roger Hannah

As a relatively small business, it has been helpful that around half of our business is through steady property management fees. Occupiers seem to be making more decisions, however, and, rather than there just being market-scoping exercises, they are starting to do deals and the prelet market is starting to get better.

Andrew Simpson, senior partner, Dron & Wright

The market has been tough in the regions, but there have been a couple of oases. Forestry and the rural market have been driven up in line with commodities, and Cambridge, with its international profile, has also prospered. The residential investment market appears to be the market to watch for the years to follow and there has been increased pressure from housebuilders to push through planning consents.

Patrick McMahon, senior partner, Bidwells

Top property services firms ranked by UK turnover per fee-earner

Rank	Firm	UK turnover (£m):	Number of UK partners/fee earners:	Turnover per fee earner (£)	Total UK staff	Turnover per head (£)
1	Beauchamp Estates (Mayfair)	5.3	6	883,333	13	407,692
2	James Andrew International	3.5	8	437,500	25	140,000
3	Robert Pinkus & Co	1.3	5	260,000	10	130,000
4	CVS Commercial Valuers & Surveyors	14.6	57	256,140	245	59,592
5	Speirs Gumley	3.9	16	243,750	71	54,930
6	Knight Frank	200.3	845	237,041	1,423	140,759
7	Briant Champion Long	5.8	25	232,000	32	181,250
8	Cushman & Wakefield	110	487	225,873	655	167,939
9	Mason Partners	4.4	20	220,000	40	110,000
10	Savills	399.1	1831	217,968	3,503	113,931
11	CBRE	247	1158	213,299	1,702	145,123
12	J Peiser Wainwright	0.6	3	200,000	6	100,000
13	Deloitte Real Estate	129.7	684	189,620	755	171,788
14	Lamberts	2.8	15	186,667	32	87,500
15	Allsop	33.1	189	175,132	250	132,400
16	Jones Lang LaSalle	325	1856	175,108	2,532	128,357
17	BNP Paribas Real Estate	64.2	370	173,514	597	107,538
18	GVA	120	700	171,429	1,204	99,668
19	Cluttons	36.9	216	170,833	311	118,650
20	Montagu Evans	27.5	166	165,663	217	126,728
21	Hartnell Taylor Cook	4.8	29	165,517	52	92,308
22	GL Hearn	22	135	162,963	203	108,374
23	Gerald Eve	38	235	161,702	339	112,094
24	Lambert Smith Hampton	62.8	391	160,614	770	81,558
25	Mason Owen	4.9	31	158,065	59	83,051
26	Strutt & Parker	83.6	530	157,736	762	109,711
27

27	Dron & Wright	3	17	152,941	29	89,655
28	Eddisons	15.8	106	149,057	227	69,604
29	Dacre Son & Hartley	6.6	45	146,667	127	51,969
30	Innes England	3.66	25	146,400	47	77,872
31	Colliers International	67	470	142,553	624	107,372
32	Fleurets	4.6	33	139,394	53	86,792
33	FG Burnett	3.5	26	134,615	40	87,500
34	Johnson Fellows	2	15	133,333	31	64,516
35	Roger Hannah & Co	2	15	133,333	33	60,606
36	Strettons	7	53	132,075	91	76,923
37	Bidwells	32.5	260	125,000	393	82,697
38	Kemsley	2	16	125,000	34	58,824
39	Edward Symmons	20.6	169	121,893	262	78,626
40	Capita Symonds	78.4	652	120,245	941	83,316
41	Ryden	11.3	94	120,213	137	82,482
42	Aitchison Raffety	9.5	80	118,750	155	61,290
43	Rapleys	8.9	78	114,103	94	94,681
44	Carter Jonas	34.2	300	114,000	429	79,720
45	Underwoods	0.9	8	112,500	18	50,000
46	Barker Storey Matthews	1.9	17	111,765	33	57,576
47	Matthews & Goodman	7.4	67	110,448	83	89,157
48	Graves Son & Pilcher	1.32	12	110,000	20	66,000
49	Brown & Lee Chartered Surveyors	1.6	15	106,667	21	76,190
50	Sanderson Weatherall	13.1	126	103,968	191	68,586
51	Olivejoyce	0.1	1	100,000	2	50,000
52	Caxtons	4.2	43	97,674	78	53,846
53	Vickery Holman	2.2	24	91,667	48	45,833
54	Chase & Partners	1	11	90,909	13	76,923
55	Goadsby Group	11	170	64,706	227	48,458

* MJ Mapp does not register fee earners because of property management nature of business

Top European property services firms ranked by European turnover

Rank 2013	Rank 2012	Firm	Latest European turnover (£m)	Proportion from the UK (%)	Previous year's European turnover (£m):	Year-end	Number of own offices	Affiliate offices
1	2	Jones Lang LaSalle	723	N/A	615	Jan-13	78	N/A
2	1	CBRE*	650	N/A	N/A	31-Dec-12	92	47
3	3	BNP Paribas Real Estate	560	13	550	Dec-12	13	10
4	4	Savills	469.3	85	417.8	Dec-12	118	17
5	5	Cushman & Wakefield	261	42	267	Dec-12	55	N/A

6	6	Knight Frank	248.4	81	238.3	Mar-13	85	63
7	8	Colliers International	202	30	207	Dec-12	35	50
8	7	DTZ	125.6	N/A	N/A	Aug-12	93	N/A

* CBRE figure is EMEA (Europe, Middle East and Africa)

Top global property services firms ranked by worldwide turnover

Rank 2013	Rank 2012	Company name:	Latest global turnover (£m)	Previous global turnover (£m):	Change (%)	Year-end	Own offices	Own staff	Affiliate offices	Total staff worldwide
1	1	CBRE	4,110	3600	14.2	Dec-12	332	37,050	101	42,050
2	2	Jones Lang LaSalle	2477	2259	9.7	Jan-13	200+	48000	n/a	48,000
3	3	Cushman & Wakefield	1575	1260	25.0	Dec-12	253	-	-	15,000
4	4	Colliers International	1,330	1110	19.8	Dec-12	432	12,635	50	13,500
5	8	DTZ	1046	N/A	N/A	Aug-12	208	26,000	N/A	N/A
6	5	Savills	806.4	721.5	11.8	Dec-12	161	25016	500+	N/A
7	6	BNP Paribas Real Estate	560	550	1.8	Dec-12	17	3,300	17	6,300
8	7	Knight Frank	423.3	397.4	6.5	Mar-13	143	5650	244	13,700

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