

2026 Facilities Benchmark Report

How European multi-site operators find 21 to 39% savings through better provider performance

ServiceChannel

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OVERVIEW

Who Will Benefit From This Report?

This report is written for facilities, operations and maintenance leaders responsible for service provider networks across multiple sites. It will be most useful if you are managing a network of providers across more than one market, carrying budget accountability for repair and maintenance spend, and being asked by procurement or finance to evidence how providers are performing rather than simply what they charge.



About the Data

The benchmarks behind this report are drawn from more than 5.7 million work orders raised across 68,000 locations, covering over $2 billion in tracked repair and maintenance spend.

5.7M
Work Orders

68K
Locations

$2BN
Tracked repair and maintenance spend

This is not survey data. It is what actually happened on the platform.

That platform data is US-generated, and local labour rates, currency and compliance regimes plainly differ from Europe. However, the findings here are ratios rather than absolute costs: how median cost, speed and first-time completion differ between the top and bottom quartiles.

A provider who needs three visits where another needs one carries that cost in London exactly as they do in Los Angeles. That gap is structural, not regional. Benchmark cost figures are given in US dollars, because the ratio is the finding and the currency is not.

A Note on Providers and Provider Networks

Throughout this report, "provider" refers to a trade contractor carrying out repair and maintenance work, whether engaged directly or through a managing agent. "Operator" or "brand" refers to the organisation buying and managing those services. A provider network is the full group of contractors used by that operator.

At individual-provider level, performance can be ranked on three measures: cost, measured as median invoice cost per work order; speed, measured as time to arrive on site or complete the work; and quality, measured as first-time completion rate.

Individual providers should be compared only with peers working in the same trade and market. In the sector benchmarks later in this report, retail and quick-service restaurant figures compare operators by provider-network performance; grocery compares individual refrigeration providers.



Key Takeaways

The Cost of the Gap

Understand the financial and operational impact of the performance gap between stronger and weaker providers.

Rate vs Execution

See why the lowest provider rate does not necessarily deliver the lowest overall cost.

Measuring Provider Performance

Learn how cost, speed and first-time completion can be used to rank providers and expose performance differences.

Turning Insight into Action

Use provider rankings to make better decisions about site coverage, contract renewal and repair versus replacement.

Where to Start

Learn how to begin benchmarking provider performance with one trade in one market and expand from there.

1.0 INTRODUCTION

The Blind Spot in Your Provider Network

Why the same performance gap shows up in retail, grocery and quick-service restaurant provider networks, and what the data says about the cost of not measuring it.

Every provider network has a bottom quarter. However, very few facilities teams have access to the data to identify it.

Those providers costing the most are rarely the ones with the highest hourly rates. More often they are the ones generating repeat callouts, missing service levels and quietly eroding the maintenance budget over months, in ways individual invoices do not reveal. The biggest impact on cost is not what providers charge for a callout. It is the repeat visits that should not have happened in the first place.

Part of the reason is how multi-site estates are built. Companies often grow by acquisition, inheriting a different, unaudited provider base with every store or restaurant absorbed into the network. In Europe that complexity compounds across borders, where a single estate can span several countries, each with its own provider market, labour costs and compliance regime. Provider performance data rarely exists in one comparable form across an entire estate, because the estate was never assembled in one piece.

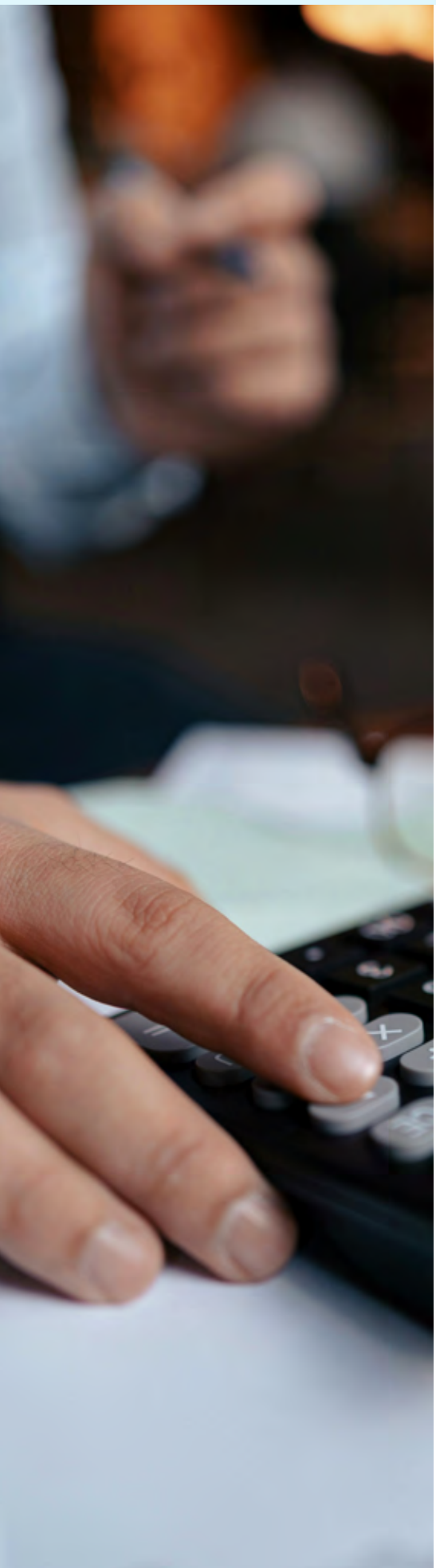
The size of that information gap is consistent across all three sectors quoted in this report: retail, grocery and quick-service restaurants. At the benchmark level stated for each sector, top-quartile performance consistently:

- Delivers lower median invoice costs by **21 to 39%**
- Resolves issues in a fraction of the time
- Completes the job on the first visit far more often

Three different industries, three benchmark views, the same performance pattern.

The gap is not a feature of those sectors. It is what becomes visible when provider and provider-network performance is measured consistently.

Source: ServiceChannel Benchmark Reports. Full details in appendix.



It Matters More Now Than It Used To

IWFM's Market Outlook Report 2026, Headwinds and Hard Choices, drawing on more than 400 UK respondents, describes a sector facing more cautious budget approvals and closer scrutiny of spend.[1]

The organisations coping best, it states, are the ones able to make decisions based on evidence.

REGULATION IS MOVING IN THE SAME DIRECTION

F-Gas obligations require detailed service records for in-scope refrigeration equipment, and energy performance rules across Europe are tightening the evidence expected of building operators. A central work-order and asset history supports that evidence trail; it does not replace the refrigerant and leak-check records required for compliance.

THE QUESTION IS NOT WHETHER PERFORMANCE VARIES

Every network has strong and weak performers. The question is whether the data exists to identify them before poor performance turns into avoidable cost, and whether you can show the evidence when the procurement team asks.

1 *Institute of Workplace and Facilities Management, Market Outlook Report 2026: Headwinds and Hard Choices, a call for insight and agility. Published June 2026.*

NEEDED A TITLE FOR THIS CHART. PLS RENAME CHART OR SUBSECTION. CONSIDER "Where top performers save the most" FOR SUBSECTION

Cheaper Per Hour Does Not Mean Cheaper Per Fix

Compared within the same trade and stated benchmark population, the difference between top- and bottom-quartile performance is significant, and it holds across every sector measured.

A performance gap only means something if the comparison is impartial. The figures below compare the same trade within each sector and use the source's stated benchmark level, so the results are not presented as though operators and individual providers were the same population.

In retail and quick-service restaurants the comparison is between operators: those whose provider networks rank in the top quartile against those whose networks rank in the bottom quartile. In grocery it is between individual refrigeration providers.

Both show the value of stronger performance at the level measured. This is not the difference between an expensive estate and an efficient one; it is the difference between stronger- and weaker-performing provider networks or providers.

On cost, that difference runs from 21 to 39%. Speed and first-time completion follow the same line. At the level measured, lower median cost is associated with faster service and higher first-time completion, though not necessarily with a lower hourly rate. The figures below are cost per work order, not rate.

WHERE TOP PERFORMERS SAVE THE MOST

The chart illustrates how much lower median invoice cost per work order is in the top quartile, for the same trade within each sector. Retail and quick-service restaurants compare operators by provider network; grocery compares individual providers.

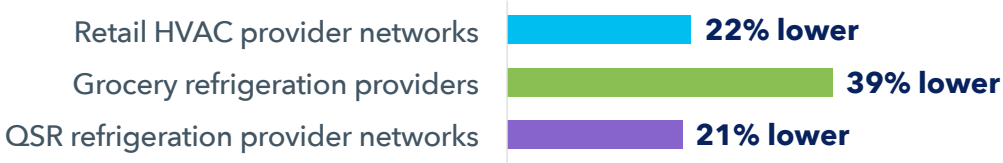
Top-quartile performance is worth

21 to 39%

on cost.

Source: ServiceChannel Benchmark Reports. Full details in appendix.

Top-quartile cost advantage by sector



Compared within the same trade and benchmark population, the gap appears in cost, speed and first-time completion.

Retail

HVAC provider networks

	Bottom quartile network	Top quartile network
Cost *Median invoice cost*	**$525**	**$412** 22% lower
Speed *Completion time, days*	**7.3 days**	**4.7 days** 2.6 days faster
Quality *First-time completion rate*	**84%**	**92%** 8 points higher

Grocery

Refrigeration providers

Cost *Median invoice cost*	**$638**	**$386** 39% lower
Speed *Completion time, days*	**8 days**	**1.7 days** 6.3 days faster
Quality *First-time completion rate*	**43%**	**84%** 41 points higher

Quick-service restaurants

Refrigeration provider networks

Cost *Median invoice cost*	**$487**	**$384** 21% lower
Speed *Completion time, days*	**6.3 days**	**3.6 days** 2.7 days faster
Quality *First-time completion rate*	**79%**	**87%** 8 points higher

Speed is measured as time to complete the work in retail and quick-service restaurants, and as time to arrive on site in grocery. In grocery refrigeration, product is at risk from the moment of failure, so time to arrive is the number that governs loss. The day counts are therefore not directly comparable between sectors. The gap between the top and bottom quartile within each sector is. Sources for each sector are listed in the appendix.

WHAT THAT GAP IS WORTH

An illustrative model based on ServiceChannel platform benchmarks estimates that upgrading from bottom-ranked to top-ranked performers across five key trades (refrigeration, HVAC, kitchen equipment, plumbing and general repairs) could reduce repair spend by about 30%. For a 100-location US grocery chain, the model equates that to around $2.4M a year, or approximately €2.1M / £1.8M.

For a network starting from the middle rather than the bottom, the same illustrative model estimates a saving of about 17%.

$2.4M
€2.1M
£1.8M

Reduced annual repair spend

These are scenario estimates, not guaranteed savings. They are derived from US platform data and assumptions about trade mix and provider distribution. Recalculate them against your own addressable repair spend, current provider mix and local costs before use.

Converted at $1 = €0.86 / £0.74, August 2026. Figures are indicative; actual results will vary.

WHAT HAPPENS WHEN THE GAP IS REVEALED

The gap is not fixed. Where facilities teams have started measuring provider performance and acting on what it shows, the movement appears in the same three measures.

Fendi manages 85 locations across 35 countries with a facilities team of two. Before it began measuring provider performance, the team had no consolidated view of 3,500 work orders a year raised against more than 100 providers, and no basis on which to hold any of them to account. Average resolution time fell from 12.5 days to 1.5.

A global specialty retailer running 4,000 stores had no formal process for tracking provider performance against KPIs. After introducing one, total invoice spend fell by 21%, average invoice cost per work order fell by 11%, and mean resolution time fell by 46%.

DYNE Hospitality runs 100 quick-service cafés with a single facilities manager. Provider scores tripled on on-time arrival, first-time completion and check-in compliance.

None of these are large facilities teams. Two of the three run estates of eighty locations or more with fewer than three people. What changed was not headcount. It was what they could see.

3.0 HIDDEN IN PLAIN SIGHT

What You Can See at Tender, and What You Cannot

The savings are not in the rate card. They are in the second visit that isn't required.

RATE IS THE EASIEST NUMBER TO COMPARE AT TENDER

Rate cards are usually the easiest tender numbers to compare. Specifications may also include weighted service levels, references and first-time-fix requirements, but historic hours, return visits and days out of service are often unavailable in a comparable form. Without that evidence, the lower rate can appear more attractive while the higher total cost emerges later across separate invoices.

This is the mechanism that keeps the gap in place. The decision is made on the number that is most readily comparable, while the numbers that determine what the work actually costs emerge only after performance has been observed.

WHY THE CHEAPER RATE COSTS MORE IN THE END

Stronger-performing providers can resolve issues faster and spend less labour time overall, even where their hourly rate matches or exceeds a lower-ranked provider's.
A technician who diagnoses correctly on the first visit bills only once. One who does not bills twice (or more), and the second visit carries its own call-out charge, travel time and additional disruption to business.

None of that appears on a rate card. Rate is what a provider charges. Cost is what they leave behind.

3 to 4x

More spend on retail emergency HVAC repairs vs. planned visits



Three Metrics

Three measures, usually obtainable from records the facilities team already holds.

Provider performance can be ranked on three measures. Together they can place each provider against peers working in the same trade and market.

Once scored, providers can be grouped into the top 25%, bottom 25% and middle 50%. The scoring rule and minimum sample threshold should be set before the results are reviewed.

Define the scoring method before seeing the results. Standardise cost, speed and quality so each contributes transparently, then apply weights agreed with procurement, using equal weighting unless business-critical speed or quality justifies otherwise. Compare like-for-like work and control for priority, planned versus reactive jobs and asset mix.

COST

Median invoice cost per work order

SPEED

Time from dispatch to on site, or to completion

QUALITY

First-time completion rate

WHAT A RANKED NETWORK LOOKS LIKE

The table below is an illustrative example rather than benchmark data. It shows eight HVAC providers working the same trade in the same market, ranked on the three metrics over twelve months. The figures and the currency are indicative only.

Provider	Work orders	Median invoice	Median days to resolve	First-time completion	Quartile
Provider C	240	€347	4.4	93%	Top
Provider F	185	€358	4.9	91%	Top
Provider A	310	€376	6.1	89%	Middle
Provider H	150	€389	7.0	85%	Middle
Provider G	95	€402	5.4	87%	Middle
Provider B	205	€421	6.6	88%	Middle
Provider D	275	€446	7.6	83%	Bottom
Provider E	120	€463	8.1	81%	Bottom

Three Things the Ranking Reveals

Three things become visible the moment a network is laid out this way.

01 **The provider handling the most work orders is not the best one.**

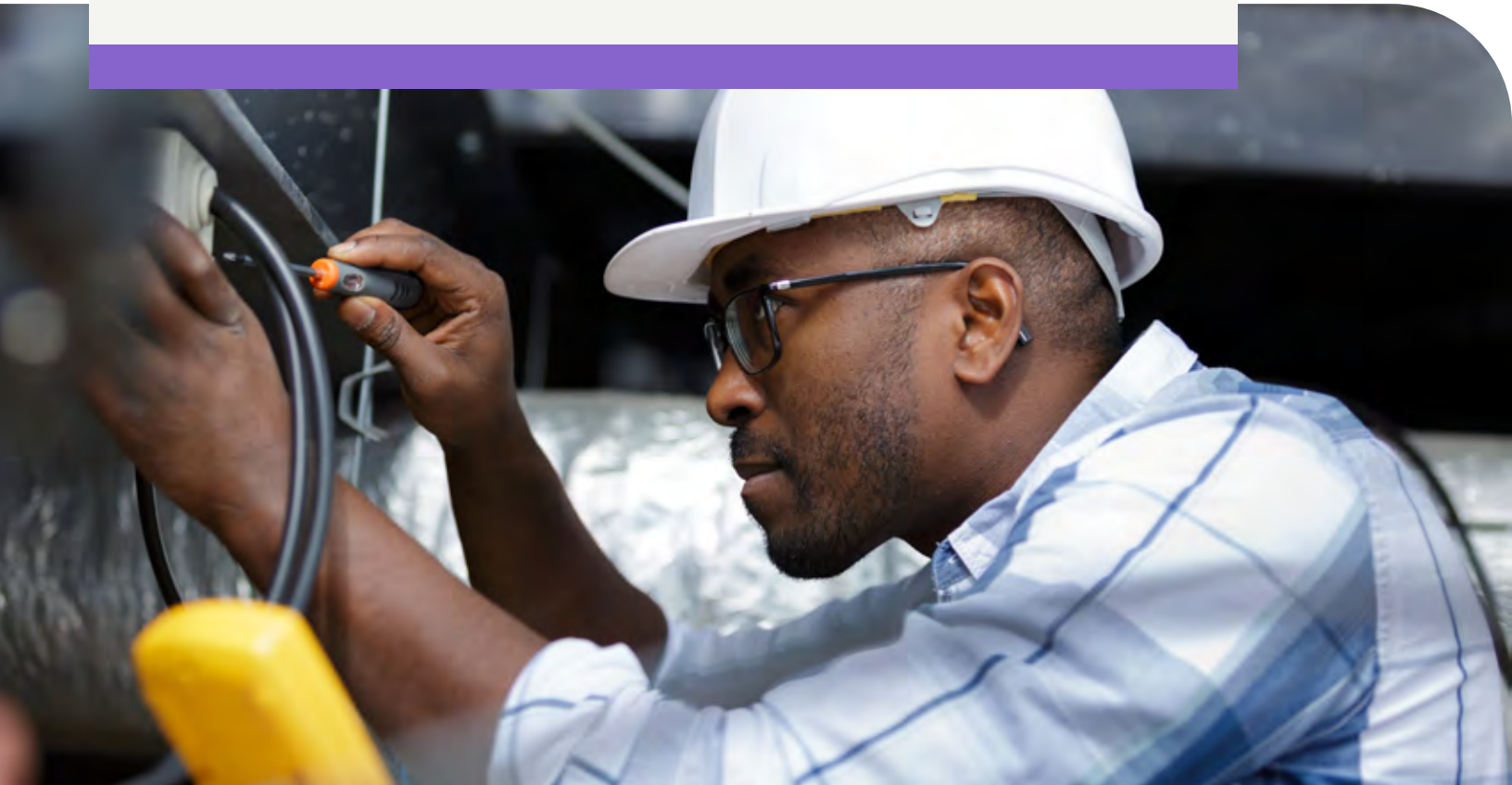
Provider A handles more than anyone else in this network and sits in the middle 50%. High volume is where a performance conversation has the most leverage, and it is the first place worth having one.

02 **No single column decides the ranking.**

Provider G costs less than Provider B and resolves faster, but completes fewer jobs on the first visit. Provider H is mid-range on cost and among the slowest. Quartile placement should reflect all three metrics using the scoring rule agreed in advance; ranking on price alone produces a different and less useful order.

03 **Volume determines how far the ranking can be trusted.**

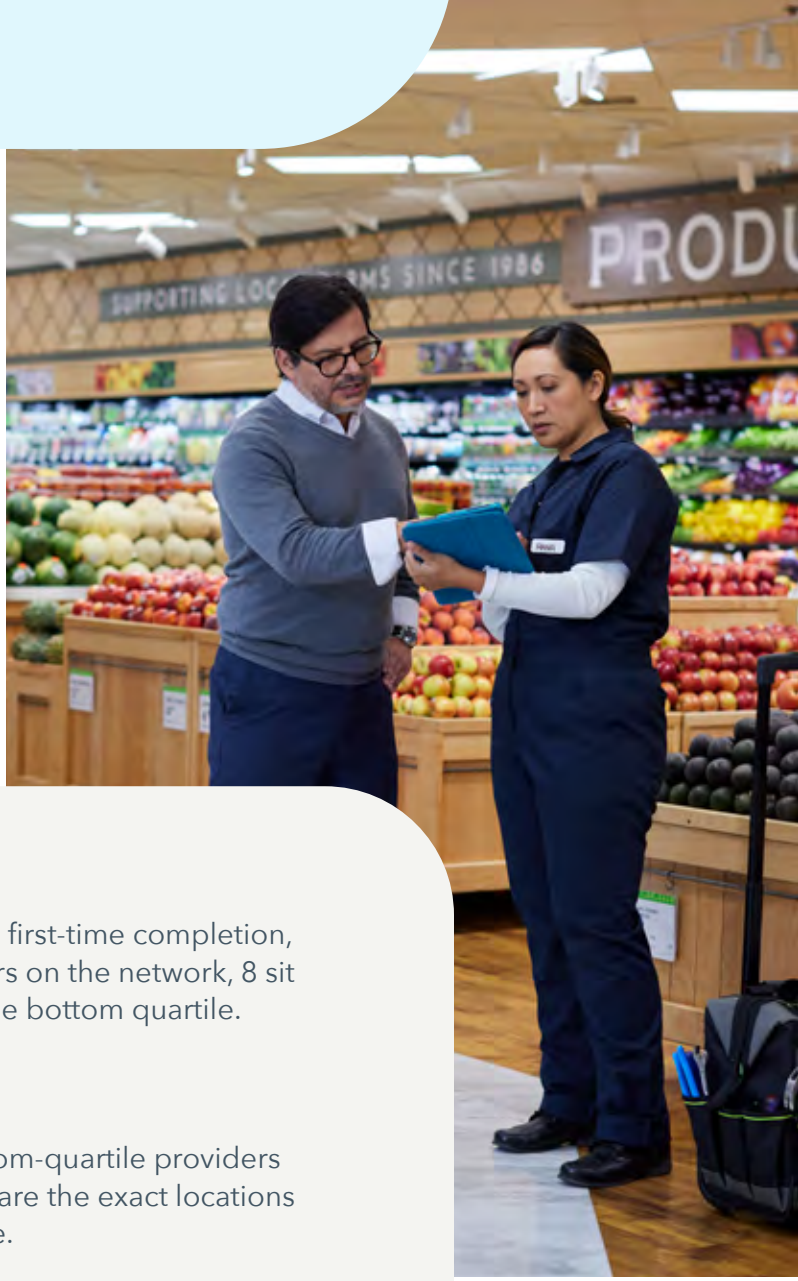
Provider A handles more than anyone else in this network and sits in the middle 50%. High volume is where a performance conversation has the most leverage, and it is the first place worth having one.



A Real-World Scenario

(illustrative example)

Consider a facilities manager at a large European grocery retailer, managing refrigeration and HVAC providers across several hundred stores.



30 HVAC providers

Once providers are scored on cost, speed and first-time completion, the manager can see that of 30 HVAC providers on the network, 8 sit in the top quartile, 15 in the middle and 7 in the bottom quartile.

Highest-footfall stores

Cross-referencing spend reveals that two bottom-quartile providers are covering the highest-footfall stores. These are the exact locations where a slow repair costs the most in lost trade.

Reallocate or improve

One of the two is replaced, with its work reallocated to a top-quartile provider already active in the same region. The other is kept on, but future renewal is now tied to hitting the network's median first-time completion rate, backed by the scorecard data.

Repair or replace

A separate pattern also surfaces: one HVAC unit has been serviced five times in eight months by three different providers. That may not be a provider problem at all. It is the kind of pattern that should trigger a repair-versus-replace review, and the data has been quietly pointing to it the whole time.

5.0 ACTING ON THE RANKING

Turning Insight Into Action

What the ranking is for, and the three decisions it informs.

A ranked network answers three questions that are difficult to answer any other way. Each is a different cut of records you already hold.

01 **Are your weakest providers covering your most valuable sites?**

Overlay the ranking onto the site list. Weak providers are rarely spread evenly across an estate, and a bottom-quartile provider covering the locations where downtime costs most in lost trade is a coverage problem rather than a contract problem. It can often be resolved by reallocating work to a top-quartile provider already active in the same region, without renegotiating anything.

02 **Which renewals should be about performance rather than price?**

Look at the contracts falling due in the next twelve months alongside the quartile each provider sits in. Renewal is the point at which you have leverage, and quartile placement tells you what to use it for. For a weak provider that need not mean termination. It can mean renewal conditional on reaching the network median, with the scorecard behind it.

03 **Which assets are failing repeatedly, regardless of who attends?**

Sort work orders by asset rather than by provider or date. An asset serviced repeatedly across several different providers may not be a provider problem at all. It is the kind of pattern that should trigger a repair-versus-replace review, and sorting by asset is the only cut that makes it visible. Most teams never look at their data that way, which is why a failing unit reads as a series of unremarkable jobs.

The ranking does not tell you what to do. It tells you which conversations are worth having first, and gives you something to bring to them.



6.0 WHERE TO START

One Trade, One Market

You do not need clean estate-wide data to determine where you stand.

The obstacle is rarely willingness. It is scale. Assembling comparable performance data across every trade in every country is a programme of work, and facilities teams under budget scrutiny do not get to pause operations while they build one. The way around it is to stop trying. A single trade in a single market produces a real answer, and it produces it from records that already exist.

START WITH THE TRADE CARRYING THE MOST SPEND

Ranking only means something within a trade, because an HVAC provider and a plumbing provider are not comparable on cost or resolution time. Starting with the largest trade by spend gives the most material answer and, just as importantly, the most work orders to rank on. In retail that is usually HVAC. In grocery and quick-service restaurants it is usually refrigeration. In most estates it is whichever trade keeps the doors open.

STAY INSIDE ONE MARKET TO BEGIN WITH

One country means one currency, one labour market and one compliance regime. Differences that survive those controls are provider differences rather than market differences. Compare a German provider against a Spanish one and the ranking tells you about Germany and Spain, not about the two providers.

WHAT THE THREE METRICS NEED:

COST

Cost needs the invoice value attached to each work order.

SPEED

Speed needs three dates recorded against the work order: when it was dispatched, when someone attended and when it was closed.

QUALITY

Quality needs to know whether the job required a return visit.

Most estates hold all three somewhere, which is a different problem from not holding them at all.

Expect the Records to Be Fragmented

Work orders usually sit across email, spreadsheets and systems that do not talk to each other. The same provider appears under three spellings. Return visits are raised as fresh jobs rather than linked to the original. This is what fragmented records look like in a multi-site estate, and it is the ordinary consequence of an estate assembled over time rather than designed in one go. It is not a reason to wait for a cleaner dataset, because a cleaner dataset is not coming on its own.

WHAT CHANGES AS COVERAGE WIDENS

One trade in one market tells you whether a gap exists and roughly how wide it is. It will not tell you whether a weak provider is weak everywhere or only in that trade. Adding a second trade in the same market answers that. Nor will it tell you whether the ranking reflects the provider or the market they work in. Running the same trade in a second market answers that. Each addition settles a question the previous view could not, which is why one trade in one market is a starting point rather than a destination.



01 One trade one market

02 Second trade same market

03 Same trade second market

7.0 CLOSING AND NEXT STEP

A Gap You Can Measure



Across retail, grocery and quick-service restaurants, the same pattern holds. Top-quartile performance means median invoice costs 21 to 39% lower, faster service and higher first-time completion than the bottom quartile, whether measured across a provider network or provider by provider.

That consistency is not coincidence. Any network of independent trade firms will contain a spread of performance. The difficulty is knowing which is which before poor performance has already eroded the budget.

The facilities teams already ahead in this respect are not spending more. They are directing the same budget with greater precision, letting evidence rather than tenure decide who earns the next work order. And when purchasing departments ask which providers are underperforming and by how much, they can answer.

What this report cannot give you is the figure for your own network. That number depends on your trades, your markets and the providers you already work with, and it exists only in your own work orders and invoice records. What the report reveals is that the gap is there to be uncovered, that it is large enough to be worth the effort, and that finding it starts with one trade in one market rather than with a system change.

SEE HOW YOUR PROVIDERS MEASURE UP

The benchmarks in this report show that top-performing providers can reduce repair costs by 21-39% while delivering faster service and higher first-time completion rates. Discover how your own provider network compares.

See It in Action ›

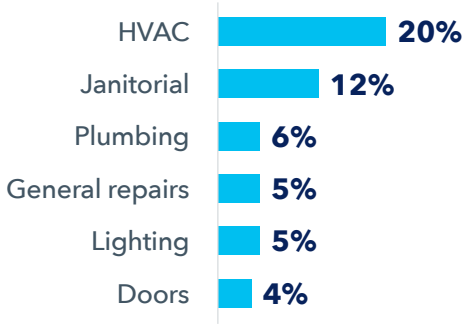
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APPENDIX INDUSTRY BENCHMARKS

Retail

Spend profiles and quartile performance for retail, grocery and quick-service restaurants, so you can go directly to your own sector. Cost figures reflect US cost levels.

Where retail spend goes



INSIGHTS

- HVAC is the single largest repair and maintenance trade for retail, accounting for 20% of total spend across small, medium and large format stores combined.
- Spend scales sharply with format size: about 25% of large-format brands invest upwards of $94K a year on R&M and CapEx, against a small-format high end of roughly $27K.
- Only 64% of large-format retailers run an active preventive maintenance programme, against 90% of smaller retailers. That gap shows up directly in emergency repair rates.

Provider network performance: HVAC

	Bottom quartile network	*Top quartile network*
Cost *Median invoice cost*	**$525**	**$412** 22% lower
Speed *Completion time, days*	**7.3 days**	**4.7 days** 2.6 days faster
Quality *First-time completion rate*	**84%**	**92%** 8 points higher

BENCHMARK HVAC FIRST

It is the largest R&M spend category in retail, and provider performance there affects cost, speed of resolution and the customer experience directly. Benchmark by store format rather than treating the estate as one average, because spend profiles differ significantly by size.

EXPERTS WEIGH IN

"We know exactly where we stand with every vendor, which helps us make them more accountable using hard data that we can generate anytime. This full-circle accountability has made everyone better."

—Kim Bowling, Senior Manager Global Store Development, Under Armour

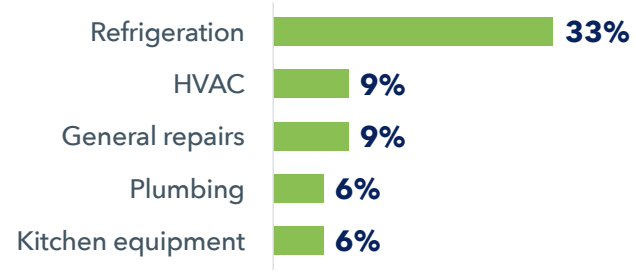
Source: ServiceChannel 2025 Retail Facilities Benchmark Report. servicechannel.com/reports/2025-retail-facilities-benchmark

APPENDIX INDUSTRY BENCHMARKS

Grocery

Spend profiles and quartile performance for retail, grocery and quick-service restaurants, so you can go directly to your own sector. Cost figures reflect US cost levels.

Where grocery spend goes



INSIGHTS

- Refrigeration is the single largest R&M trade for grocery, at 33% of spend, more than three times the next-largest category.
- Repairs consume 84% of total R&M spend industry-wide, with maintenance at just 16%, reflecting how reactive most grocery facilities spend still is.
- Refrigeration R&M averages $33,900 per location per year, and 47% of refrigeration repairs are classified as emergencies.

Provider performance: refrigeration

	Bottom quartile network	*Top quartile network*
Cost *Median invoice cost*	**$638**	**$386** 39% lower
Speed *Completion time, days*	**8 days**	**1.7 days** 6.3 days faster
Quality *First-time completion rate*	**43%**	**84%** 41 points higher

PREVENTIVE MAINTENANCE AND F-GAS

Given how emergency-heavy refrigeration repair is, preventive maintenance here has an outsized effect on cost and food-safety risk. In Europe, F-Gas obligations add a compliance dimension the benchmark data does not capture. A central work-order and asset history will not satisfy those obligations on its own, but it is the record against which refrigerant and leak-check documentation is reconciled.

EXPERTS WEIGH IN

" Prior to ServiceChannel, we were very reactive and had a false sense of control over costs. Now we have become dramatically more proactive with real-time actionable data. We are able to have meaningful improvement discussions with our vendors using vendor scorecards."

—Jeffrey Luna, Director of National Projects, ALDI

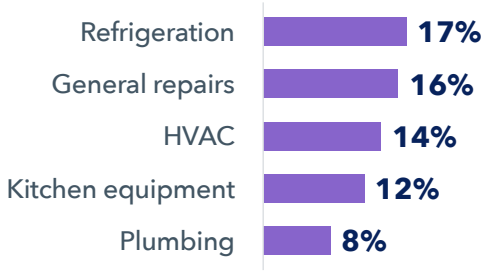
Source: ServiceChannel Grocery Facilities Benchmark Report. servicechannel.com/reports/grocery-facilities-benchmark-report

APPENDIX INDUSTRY BENCHMARKS

Quick-Service Restaurants

Spend profiles and quartile performance for retail, grocery and quick-service restaurants, so you can go directly to your own sector. Cost figures reflect US cost levels.

Where QSR spend goes



INSIGHTS

- Refrigeration is the leading R&M trade for QSR locations, reflecting how much smaller, simpler kitchens concentrate spend into fewer trades.
- 42% of QSR facilities spend goes to reactive repairs, more than maintenance (27%) and CapEx (31%) individually.
- Only 45% of QSR locations run active refrigeration maintenance, and 27% of refrigeration repairs are classified as emergency-priority, averaging $640 each.

Provider network performance: refrigeration

	Bottom quartile network	*Top quartile network*
Cost *Median invoice cost*	**$487**	**$384** 21% lower
Speed *Completion time, days*	**6.3 days**	**3.6 days** 2.7 days faster
Quality *First-time completion rate*	**79%**	**87%** 8 points higher

LEAD WITH SPEED

Top-quartile QSR provider networks complete refrigeration work 2.7 days faster than bottom-quartile networks. Where refrigeration failure puts product, food safety and trading at risk, speed of resolution matters far beyond the maintenance budget.

EXPERTS WEIGH IN

" ServiceChannel gives us visibility and transparency in all areas of our operations. Vendors know that they're on the clock when the work orders are tracked. This makes them more accountable, and we have seen improved performance."

—Senior Facilities Manager, Shake Shack

Source: ServiceChannel 2025 Restaurant Facilities Benchmark Report. servicechannel.com/restaurant-benchmark-2025



TURN BENCHMARK INSIGHTS INTO ACTION

Learn how data-driven facilities management can help you reduce costs, improve provider performance, and achieve better outcomes across your locations.

Request a demo ›

https://servicechannel.com/request-a-demo/

ServiceChannel®