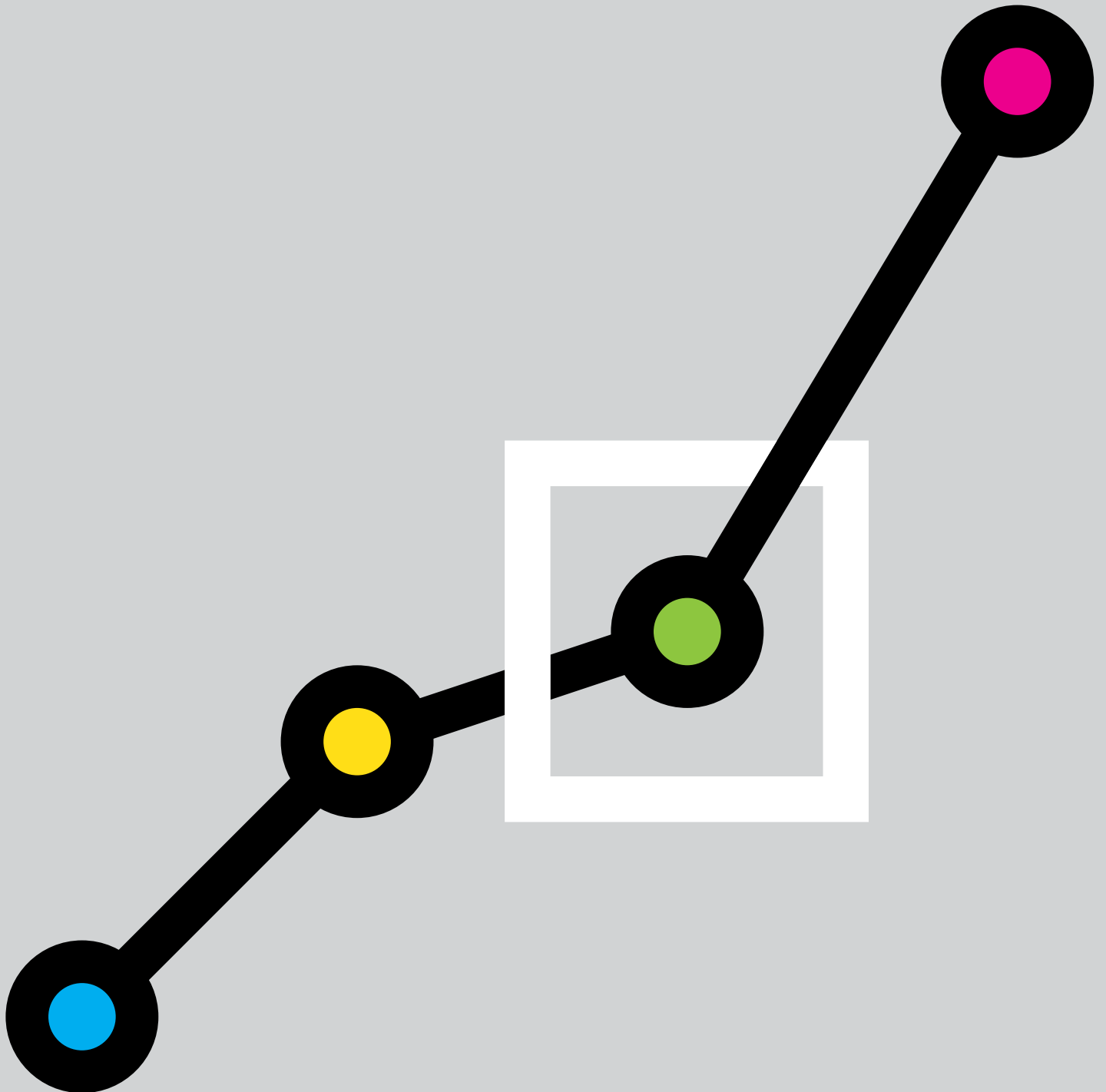


# Future Trends Survey:

June 2021



## The RIBA's monthly Future Trends Survey

was launched in January 2009 to monitor business and employment trends affecting the architects' profession. Participants give monthly predictions for overall workload and staffing levels over the next three months, and are also asked about their workload predictions in key sectors: private housing, commercial, community and public sector. In addition, practices are asked on a quarterly basis about their current workload and staffing levels. The Survey is carried out by the RIBA in partnership with the Fees Bureau. Results of the Survey, including a full graphical analysis, are published each month on [www.architecture.com](http://www.architecture.com)

The following is a summary analysis of the results from the June 2021 survey returns.

### RIBA Future Trends Workload Index (June 2021)

How do you expect the architectural workload in the organisation you work in or own to change over the next three months?

Overall Expect	%
Decrease	7
Stay the same	54
Increase	38
TOTAL	100
<b>Balance</b>	<b>+31</b>

(The definition for the balance figure is the difference between those expecting more work and those expecting less.)

In June, the RIBA Future Trends Workload Index rose by 1 point to a balance figure of +31. Optimism about future workloads remains strong. Actual workloads are 11% higher than a year ago.

Thirty-eight per cent of practices expect workloads to grow in the coming three months, whilst over half (54%) expect them to remain the same. The percentage expecting workloads has fallen to fewer than one in ten (7%).

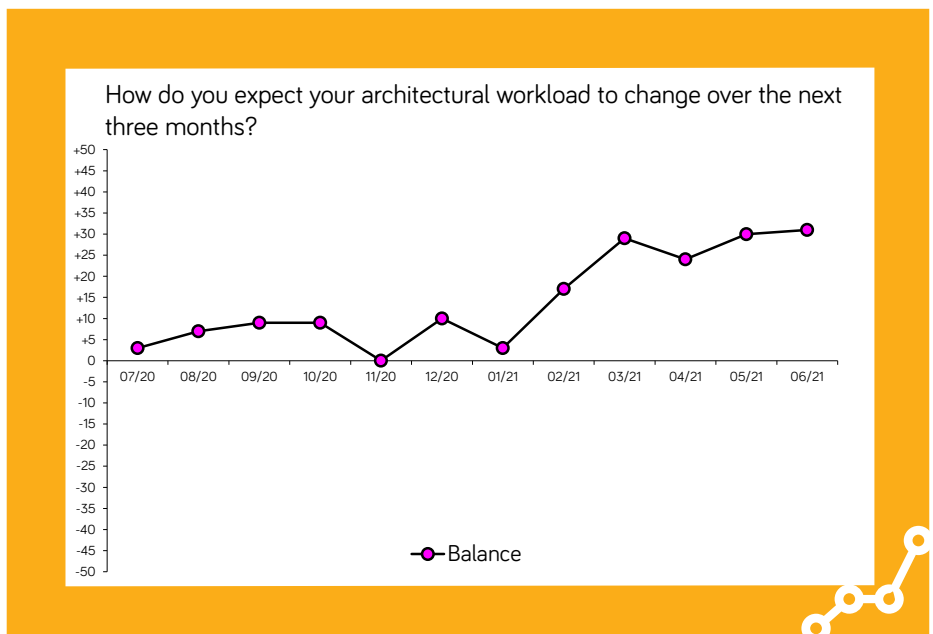
Three of the four workloads sectors are in positive territory, suggesting growing future workloads. Only the community sector remains in the doldrums, posting a balance figure of -6.

On balance, all regions expect workloads to increase in the next three months, as do all sizes of practice.

The following graph plots the RIBA Future Workload index over time:

#### Notes

The balance figure is plotted here. The definition for the balance figure is the difference between those expecting more work and those expecting less.



Looking at the June 2021 RIBA Future Trends Workload Index in terms of practice size, region and sector:

The outlook of **Small practices** (1 - 10 staff) continues to improve. In June, small practices posted a future workload balance figure of +28, a one-point increase on May's balance figure of +27.

Confidence among **Large and Medium-sized practices** (11 - 50 and 51+ staff) increased in June, with a balance figure of +56, up from May's figure of +45. Just three per cent of Large and Medium-sized practices expect workloads to drop over the coming three months.

Once again, all regions expect workloads to grow over the next three months.

Optimism in the capital continues to grow, with a balance figure of +28, up from +22 in May. This month is the first time London has exceeded February 2020's pre-pandemic figure of +23.

The South of England's balance figure has fallen back this month to +17, down from +25 in May. Though firmly positive about future workload, it is the least positive region.

The expectation of workload growth has increased in Midlands & East Anglia with an index figure of +28, up 14 points from May's figure of +14.

The North of England (+49), and Wales & the West (+45) are the two most positive regions.

Private housing continues to outperform other sectors with a very high, albeit lowered, balance score. The Commercial sector is showing signs of sustained recovery.

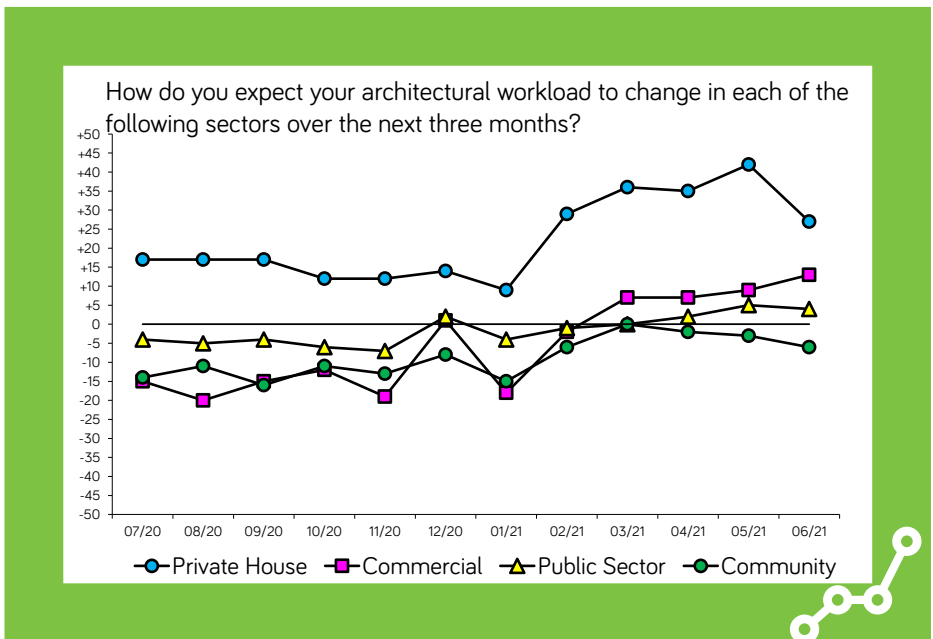
In June, the **private housing sector** posted a balance figure of +27. Whilst this is a fall of fifteen points on May's all-time high of +42, it remains strongly positive, with only one in ten practices expecting a decrease in housing work.

The **commercial sector** posted a balance figure of +13, up four points from May's figure of +7. This is the highest balance score for the commercial sector since the EU referendum was held.

Optimism about the **public sector** remains comparatively muted, with a balance figure in June +4, down from +5 in May.

The **community sector** persistently remains in negative territory, posting a balance figure of -6, down from -3 in May.

The following graph tracks the sector predictions in the RIBA Future Trends Survey over time:



**RIBA Future Trends Staffing Index**  
(June 2021)

How do you think the number of permanent architectural staff employed in your organisation will change over the next three months?

Permanent Staff	%
Decrease	5
Stay the same	79
Increase	16
TOTAL	100
<b>Balance</b>	<b>+11</b>

(The definition for the balance figure is the difference between those expecting to employ more permanent staff in the next three months and those expecting to employ fewer.)

At +11, the RIBA Future Trends Permanent Staffing Index fell back slightly, decreasing three balance points from last month's figure of +14.

Sixteen per cent of practices expect to employ more permanent staff over the coming three months, whilst 5% expect to employ fewer. Nearly four-fifths (79%) expect staffing levels to stay the same.

Medium and large-sized practices (11+ staff) continue to be those most likely to recruit staff, with a high combined balance figure of +34.

With a balance figure of +7, small practices (1 - 10 staff) also indicate that staffing levels tend to be on the up.

Looking at the regional staffing picture, the South of England is the least optimistic region this month, with a balance figure of zero.

With a balance figure of +5, London remains positive about future staffing levels, though this is down 2 points on May's figure of +7.

The Midlands & East Anglia (+14), the North of England (+19), and Wales & The West (+20) all returned strongly positive balance figures suggesting a particularly thriving jobs market outside London and the South.

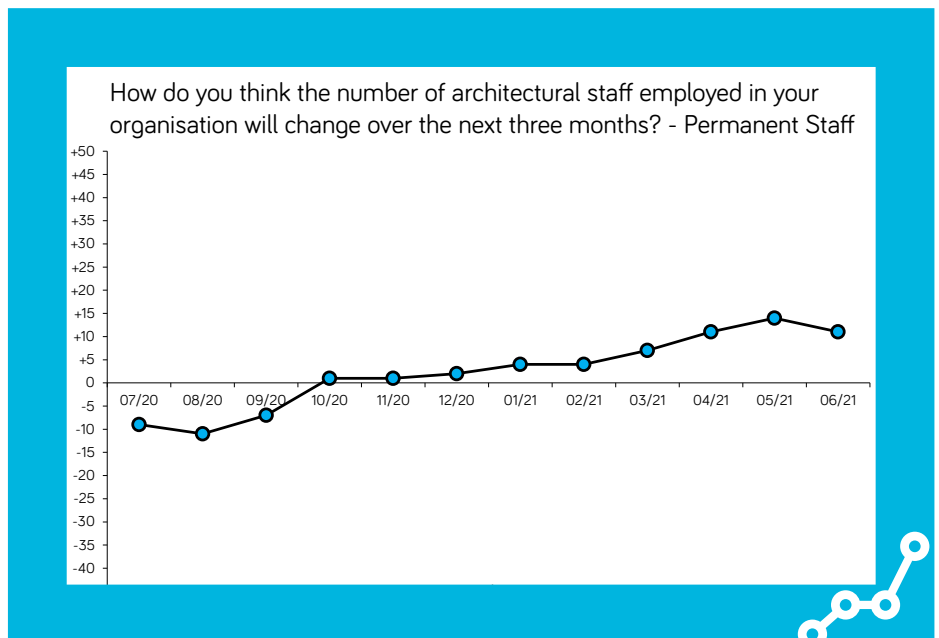
The Temporary Staffing Index held steady, returning a balance figure of +8 June, the same as in May.

Personal underemployment fell again and now stands at a to 14%.

The following graph plots the RIBA Future Trends Staffing Index over time:

**Notes**

The balance figure is plotted here. The definition for the balance figure is the difference between those expecting to employ more permanent staff in the next three months and those expecting to employ fewer.



## RIBA Future Trends (June 2021)

Overall, the June Future Trends findings indicate that the recovery in the architecture market continues.

The overall workload balance has been holding at around +30 throughout the second quarter of 2021. Private housing remains strong, and the commercial sector continues to recover. No region expects workloads to contract, and some are very optimistic.

However, risks remain, and among them is the availability and cost of building materials, with some materials being very difficult to procure.

In January's Future Trends, 63% suggested that the new trading arrangement with the EU would have a detrimental effect on the availability of building materials. In June's Future Trends, we asked whether building materials shortages are affecting architects' work.

Difficulties in sourcing construction products are causing on-site delays for 63% of practices, and a quarter (25%) report site work being put on hold. Delays are not restricted to the construction stages, with 18% reporting delays in the design process.

These difficulties are not solely the result of the UK leaving the EU. There is increased demand for materials, both within the UK and overseas, as construction activity gathers pace. The effects of the Suez blockage are still unwinding. The UK is experiencing workforce shortages within important areas, such as distribution (especially HGV drivers) and among builders merchants.

Nevertheless, the commentary received in June continues to reflect a positive market. Many practices report increasing enquiries and workloads, particularly in the Private Housing Sector.

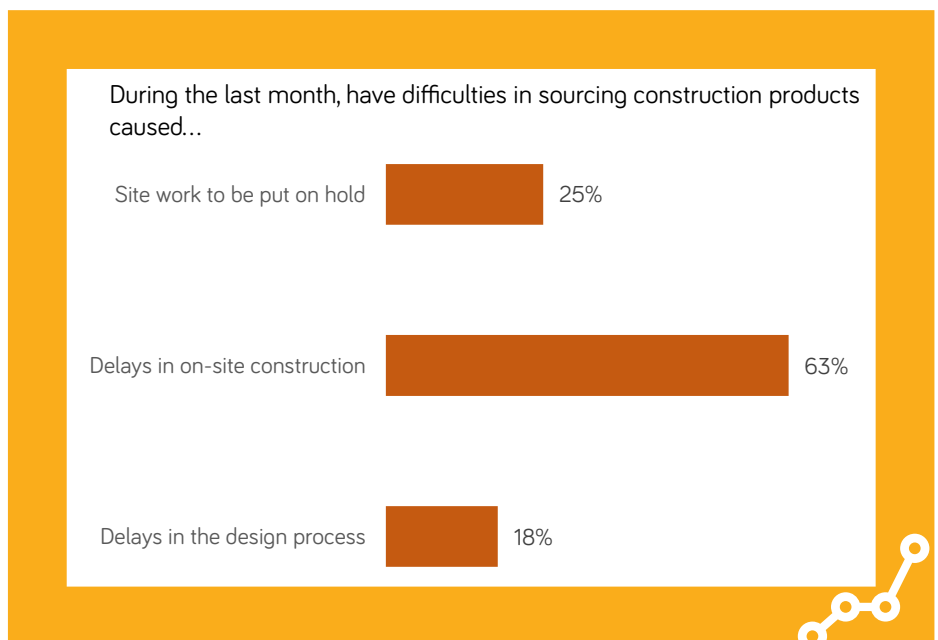
However, the RIBA continue to receive reports of significant challenges to the architect's market, and these include:

- labour shortages,
- difficulty obtaining affordable Professional Indemnity Insurance with the right level of cover,
- the speed of the planning application process causing project delays,
- shortages of construction products disrupting project delivery and creating project cost inflation, and
- the potential effects of the gathering third wave and the planned lifting of Covid-19 restrictions.

The following graph plots the effects of difficulties in sourcing construction products:

### Notes

The percentage of respondents telling us that they were personally underemployed in the last month, due to a lack of work, is plotted here.



The RIBA Future Trends Survey is based on a representative sample of the range of different practice sizes and geographical locations which enables analysis of the trends in sectors, size groups and by nation and region.

A total of 240 practices took part in the Survey in June 2021. The development of a larger database of respondents will increase the statistical accuracy of the survey, and if your practice would like to participate in future months, please contact the RIBA Practice

Department on 020 7307 3749 or email [practice@riba.org](mailto:practice@riba.org). The survey takes approximately five minutes to complete each month, and all returns are independently processed in strict confidence by our partners The Fees Bureau.