Future Trends Survey:

March 2017

RIBA
Architecture.com

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

The following is a summary analysis of the results from the March 2017 Survey returns.

Future workload (March 2017)

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	14
Stay the same	50
Increase	36
TOTAL	100
Balance	+22

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

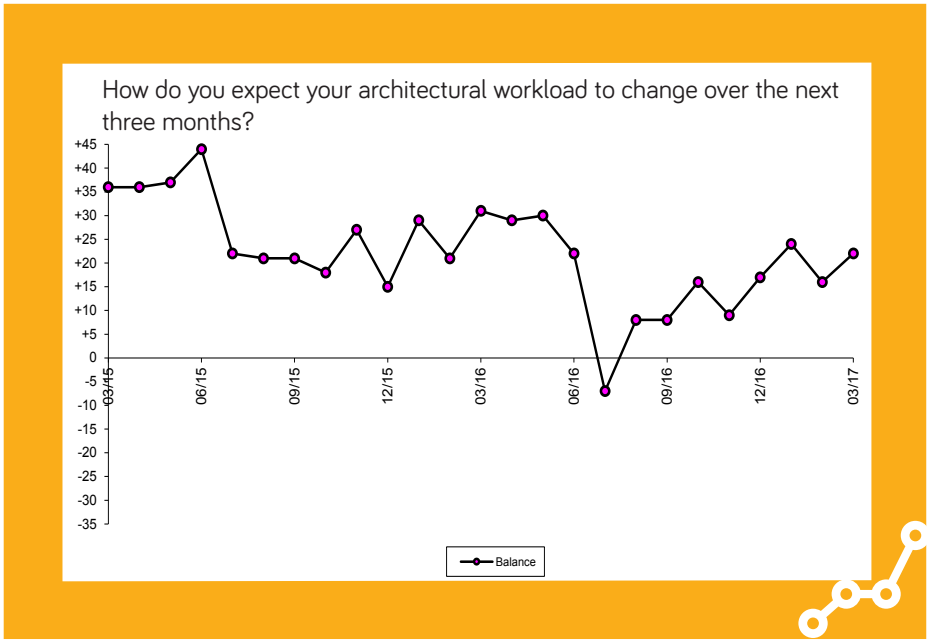
The RIBA Future Trends Workload Index showed a healthy increase this month, rising to +22 in March 2017, up from +16 in February 2017.

In terms of geographical analysis, practices in Northern Ireland (balance figure +57) were the most optimistic about medium term workload prospects, followed by those in the Midlands and East Anglia (balance figure +37) and the North of England (balance figure +30). Practices in London (balance figure +13) and the South of England (balance figure +6) remained more cautious about future workloads.

Analysing the March data in terms of practice size, large practices (51+ staff) returned a balance figure of +20. Medium-sized practices (11 - 50 staff) were more confident,, with a balance figure of +36. Small practices (1 – 10 staff) had a balance figure of +20.

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.



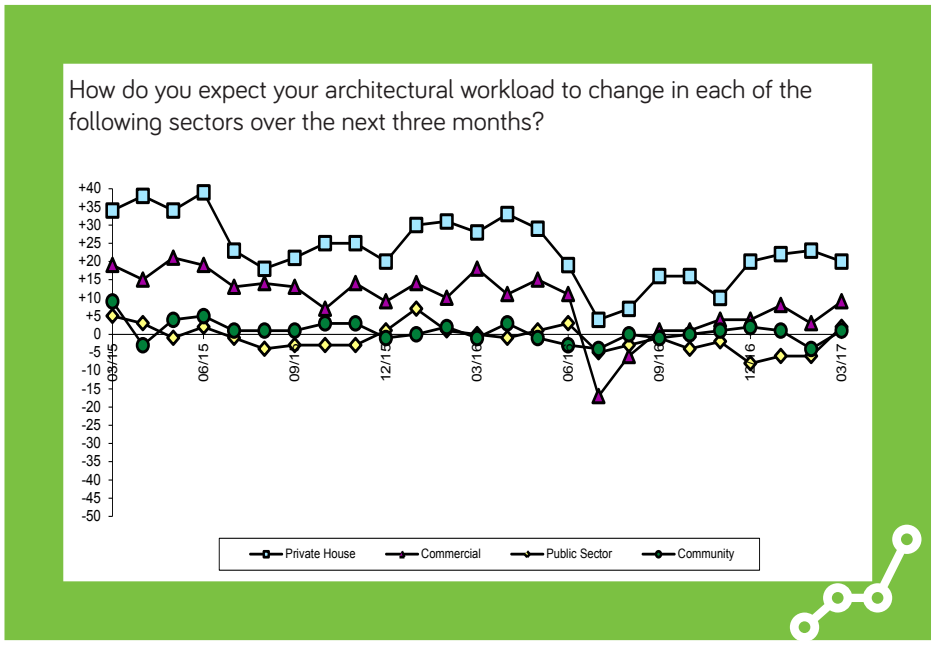
In terms of different work sectors, the private housing sector workload forecast was down slightly, falling to +20 in March 2017 from +23 in February.

The commercial sector workload forecast seems to be recovering from its post EU Referendum jitters, and bounced up this month, standing at +9 in March 2017 compared with +3 in February.

The public sector workload forecast was also on an upward trajectory, rising to +2 in March from -6 in February. The community sector forecast was also on the up, rising to +1 in March from -4 in February.

For the first time in just over a year, all four of our sector workload forecasts now sit in positive territory.

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



Future staffing levels (March 2017)

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

Permanent Staff	%
Decrease	6
Stay the same	76
Increase	18
TOTAL	100
Balance	+12

(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.)

The RIBA Future Trends Staffing Index also increased this month, rising to +12 in March 2017 from +9 in February.

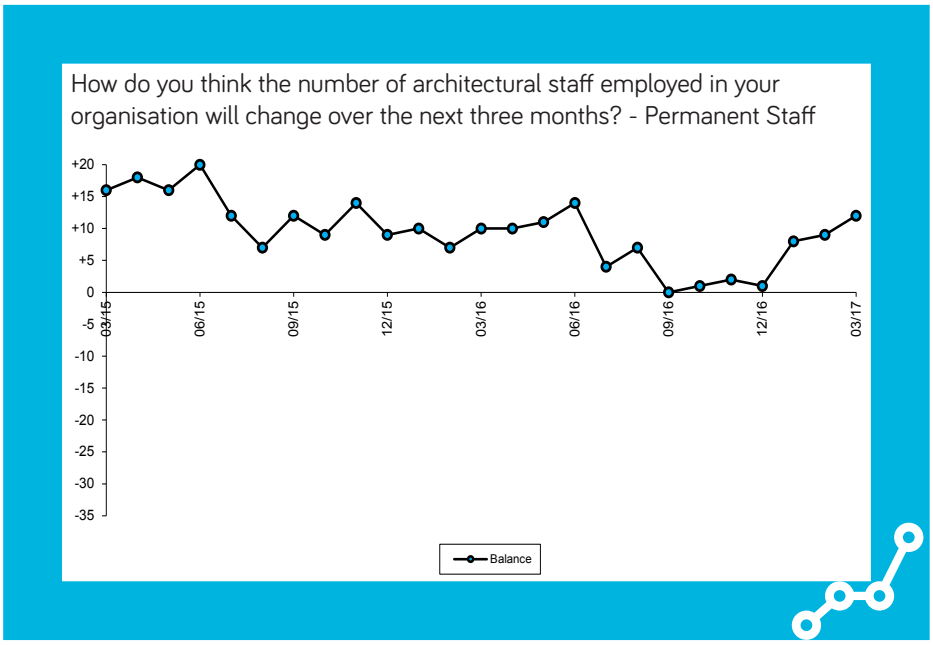
Despite some of the economic and political uncertainties in the months ahead, just 6% of practices expect to employ fewer staff in three months' time, suggesting that in general practices feel that their pipeline of work remains healthy.

This month it was again medium-sized practices (11 - 50 staff), with a balance figure of +20 that were the most positive about future staffing levels. Large practices (51+ staff) also remain upbeat about staffing levels, returning a balance figure of +10. Small practices (1 - 10 staff) saw quite a significant increase in their staffing balance figure, rising to +12 in March from +6 in February.

Commentary received this month from our participating practices can perhaps best be summarised as generally reflecting an atmosphere of qualified optimism, with most of our corresponding practices reporting a healthy current pipeline of work but less confidence about the longer term outlook.

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



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 205 practices took part in the Survey in March 2017. 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. 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.