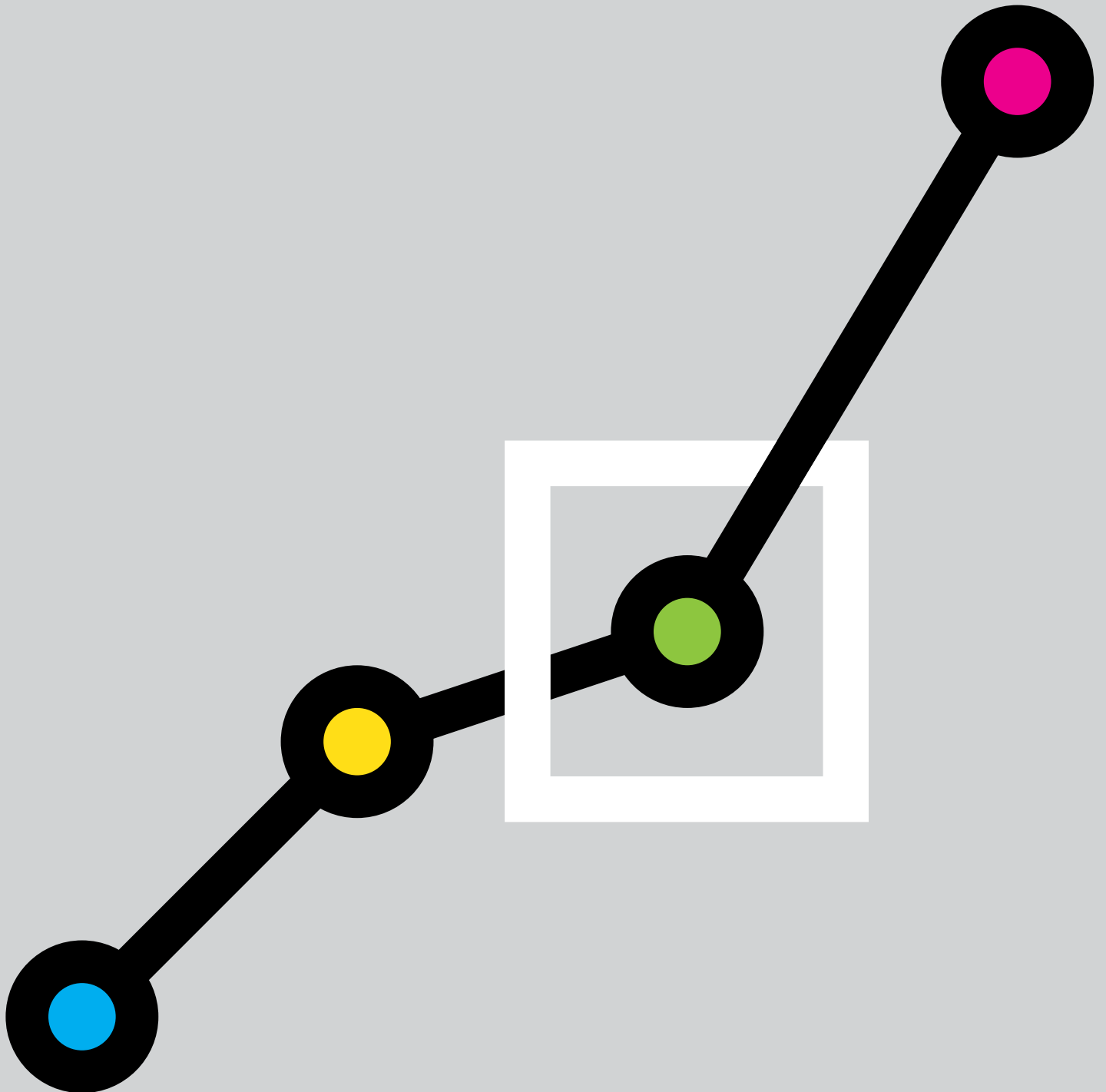


# Future Trends Survey:

July 2019



## 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 July 2019 Survey returns.

### RIBA Future Trends Workload Index (July 2019)

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	19
Stay the same	57
Increase	24
TOTAL	100
<b>Balance</b>	<b>+5</b>

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

The RIBA Future Trends Workload Index balance figure dropped four points in July, to a balance figure of +5.

After a rise to +9 in June, the July balance figure has reverted to the same figure we saw in March, April, and May: +5.

The attitude towards future workload continues to show marked regional variance.

London practices continue to be downbeat. In July, London practices recorded a balance figure of -15. This balance figure is again down; a further 7 points from last month's figure of -8.

The Midlands & East Anglia balance figure has slipped into negative territory, falling 10 points this month, down from zero in June to -10 in July.

The North of England continues to be the most positive region. Just as last month, practices in the North of England returned the highest balance figure, again +39.

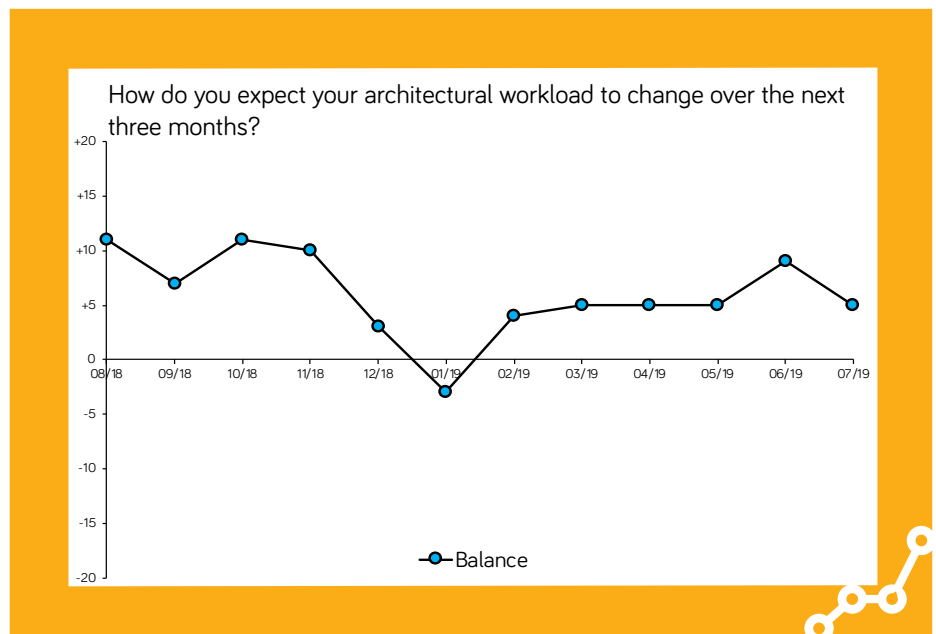
The growth in optimism in the South of England continues, with a balance figure of +21, up from +19 in June, and +3 in May.

Wales & the West continued to strengthen its outlook this month, with a balance figure of +15, in July, up from +13 in June.

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.



Analysing the July 2019 RIBA Future Trends Workload Index in terms of practice size, we can see the following:

**Small practices** (1 - 10 staff) recorded a two-point fall in their balance figure, with a positive balance of +2 in July down from +5 in June.

**Medium-sized practices** (11 - 50 staff) continue to be positive, returning a balance figure of +22. However, this is down 8 balance points from June.

**Large practices** (51+ staff) again returned a strongly positive balance figure this month.

In terms of **different work sectors**, the **private housing** sector workload strengthened, with a balance figure up from +1 in June to +3 in July. For housing, the weakest region of note was London, returning a balance figure of -18. The most positive was the North of England, returning a balance figure of +32.

Overall, larger practices currently tend to be more positive about the housing sector than smaller ones.

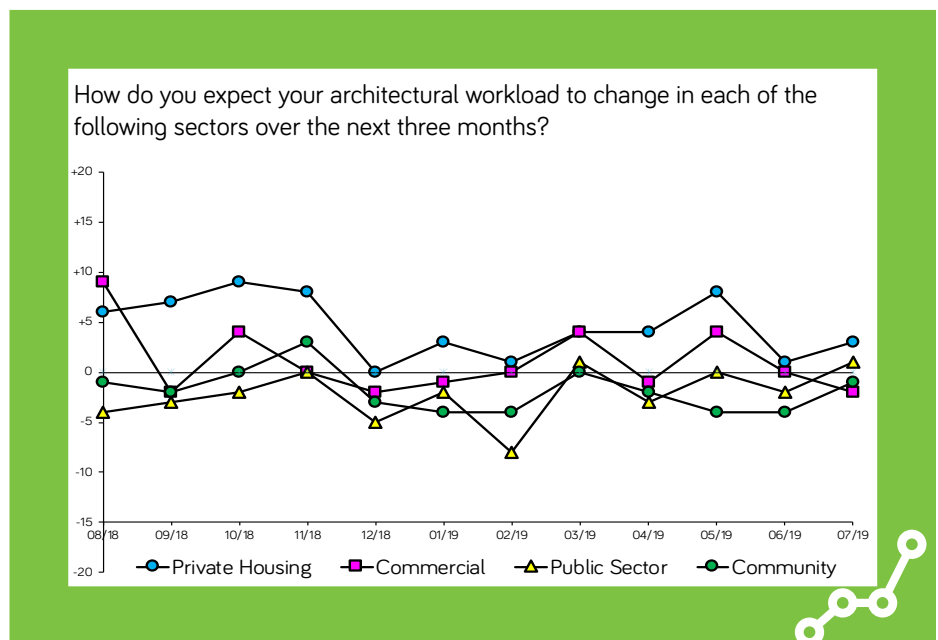
The **commercial sector** fell from a zero balance figure in June, to -2 in July. This is the fifth time in the last 12 months that the commercial sector balance figure has been negative.

The workload predictions for the **community sector** continue to be negative. In July the community sector returned a balance figure of -1. Despite being negative, this is a three-point increase, when compared to June.

The **public sector** has moved back into positive territory, returning a balance figure of +1 in July, up from -2 in June. This has been driven by positivity in the North of England, and among larger practices.

Each quarter we ask our participating practices about how their current level of work in progress compares to that of 12 months ago. In July 2019, our practices reported an annualised reduction in workload of 6%.

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



**RIBA Future Trends Staffing Index**  
(July 2019)

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

Permanent Staff	%
Decrease	12
Stay the same	79
Increase	9
TOTAL	100
<b>Balance</b>	<b>-3</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.)

The RIBA Future Trends Staffing Index fell this month, down from +2 in June to -3 in July.

This is the first time the RIBA Future Trends Staffing Index has fallen into negative territory for almost two years.

Small practices (1 - 10 staff), with a balance figure of -4, were the group with the lowest staffing index figure.

London, as well as the Midlands & East Anglia returned negative staffing index figures.

Medium sized practices (11 - 50 staff) remain upbeat about future staffing levels, as do large practices (51+ staff), with both returning a positive staffing index figure.

The North of England, the South of England, as well as Wales & the West, all returned positive staffing index figures.

Commentary from our participating practices paints a concerning picture, as Brexit continues to be highlighted.

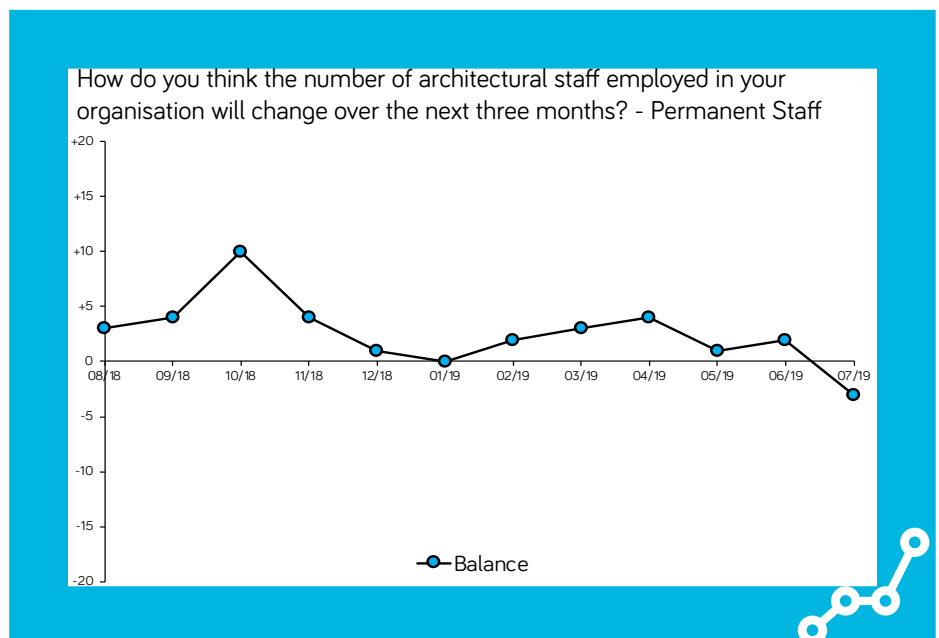
Impending Brexit is described as causing rising uncertainty, and a slowing of new commissions and architectural work. The current architectural market is described as 'challenging', 'difficult', and 'quiet'. In an ongoing atmosphere of uncertainty, projects continue to be put on hold, and fees pressured.

There is apprehension and unease about a no-deal Brexit among many of our participating practices.

We have also received commentary about the necessary challenge of moving to a sustainable built environment.

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 239 practices took part in the Survey in July 2019. 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.