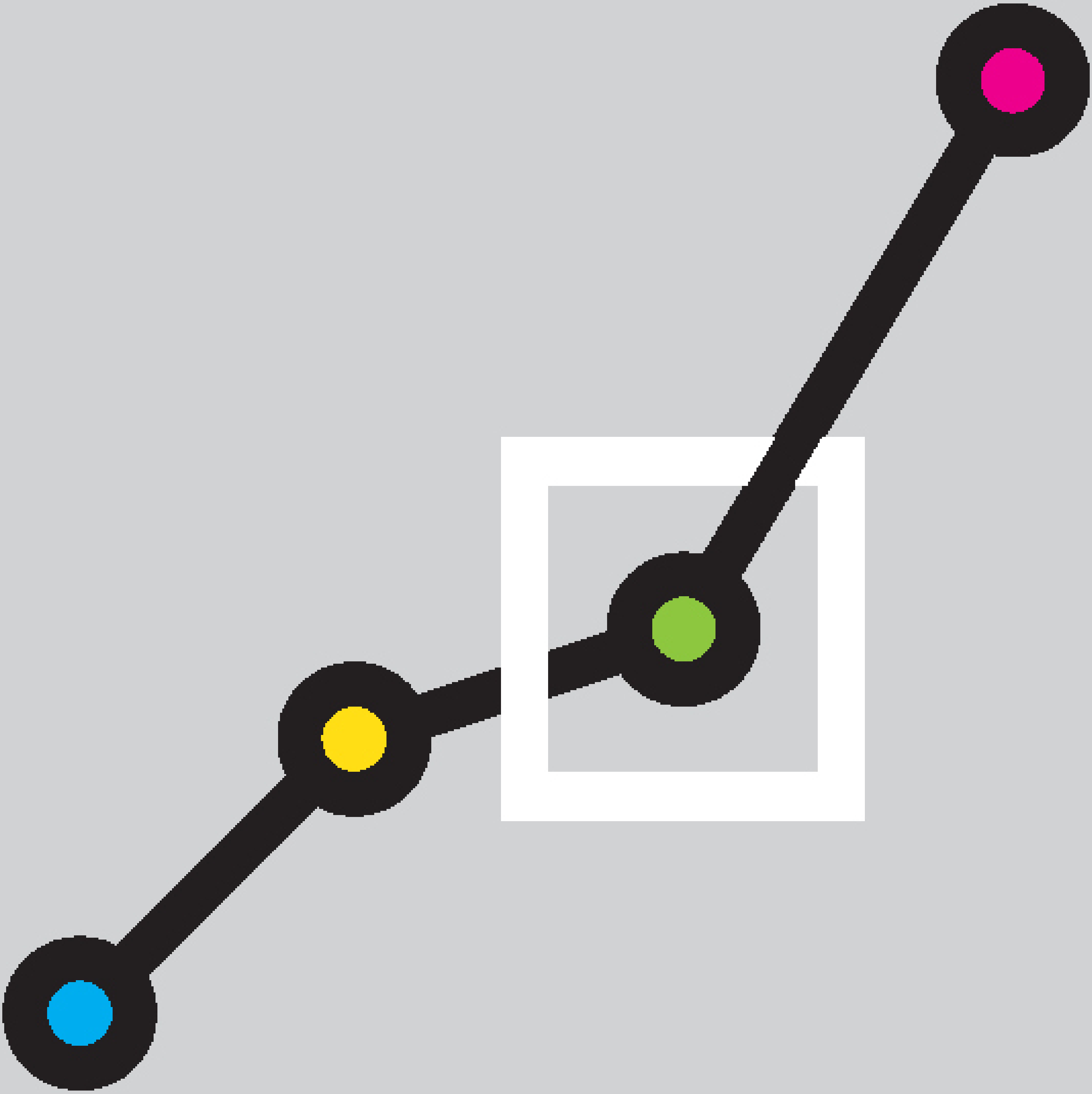
Future
Trends Survey:

September 2018



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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 September 2018 Survey returns.

Future workload (September 2018)

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	15
Stay the same	63
Increase	22
TOTAL	100
Balance	+7

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

The RIBA Future Trends Workload Index was down a little this month, at +7 in September 2018 compared with +11 in August.

In terms of geographical analysis, there was a shift in the trend we have seen recently for practices in the North of England to be much more positive than those in the rest of the UK. The balance figure for the North of England saw a significant drop, down to +12. Practices in the South of England by contrast were more optimistic than last month, with a balance figure of +11. London based practices (balance figure +1) remain the most cautious. about future workload prospects, but the gap between London and the rest has narrowed a great deal this month.

Analysing the September 2018 workload forecast data in terms of practice size, large practices (51+ staff) remain the most positive, returning a workload balance figure of +50. For medium-sized practices (11 - 50 staff) the balance figure was +4, and for small practices (1 - 10 staff) the balance figure was +6.

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

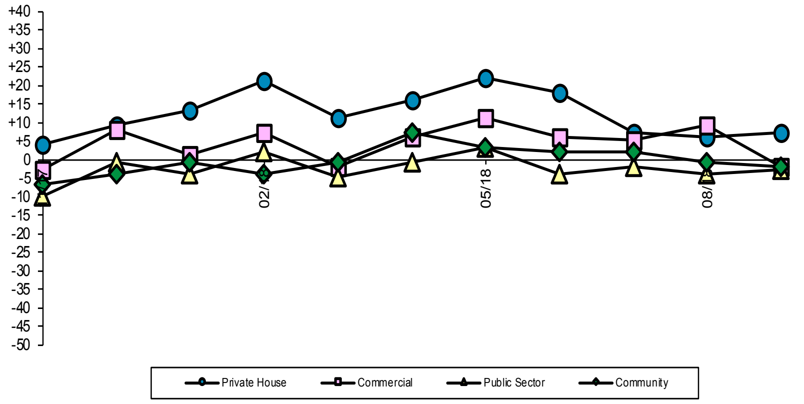
Notes
The balance figure is plotted here. The definition for the balance figure is the difference between those expecting more work and those expecting less.

In terms of different work sectors, the private housing sector workload forecast was virtually unchanged, standing at +7 in September 2018. Both the public sector workload forecast (balance figure -3) and the community sector workload forecast (balance figure -2) were also little changed this month, just remaining in negative territory.

The commercial sector forecast saw the greatest movement in September 2018, falling back from +9 in August to -2 this month, entering negative territory for the first time since March 2018, and reinforcing the sense that there is a fall in confidence on the part of clients to commit to new commercial projects.

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

How do you expect your architectural workload to change in each of the following sectors over the next three months?



Future staffing levels (September 2018)

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

Permanent Staff	%
Decrease	9
Stay the same	79
Increase	12
TOTAL	100
Balance	+3

(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.)

In contrast to the RIBA Future Trends Workload Forecast, the RIBA Future Trends Staffing Index was on the rise marginally this month, standing at +4 in September 2018, up from +3 in August.

The staffing forecast for large practices (51+ staff) was +43 in September, and large practices remain by far more confident about their ability to maintain and increase staffing levels than those in other size categories.

Medium-sized practices (11 - 50 staff), with a balance figure of -4 (down from zero last month), and small practices (1 - 10 staff), with a balance figure of +4 remain much less confident about taking on additional staff in the short to medium term.

Practices in Scotland (balance figure +20), London (balance figure +9) and the Midlands and East Anglia (balance figure +8) are more upbeat about taking on additional staff than those in the other nations and regions of the UK. Mirroring the Workload Index, practices in the North of England saw a significant dip in confidence about staffing, with the balance figure falling to -3 in September down from +11 in August.

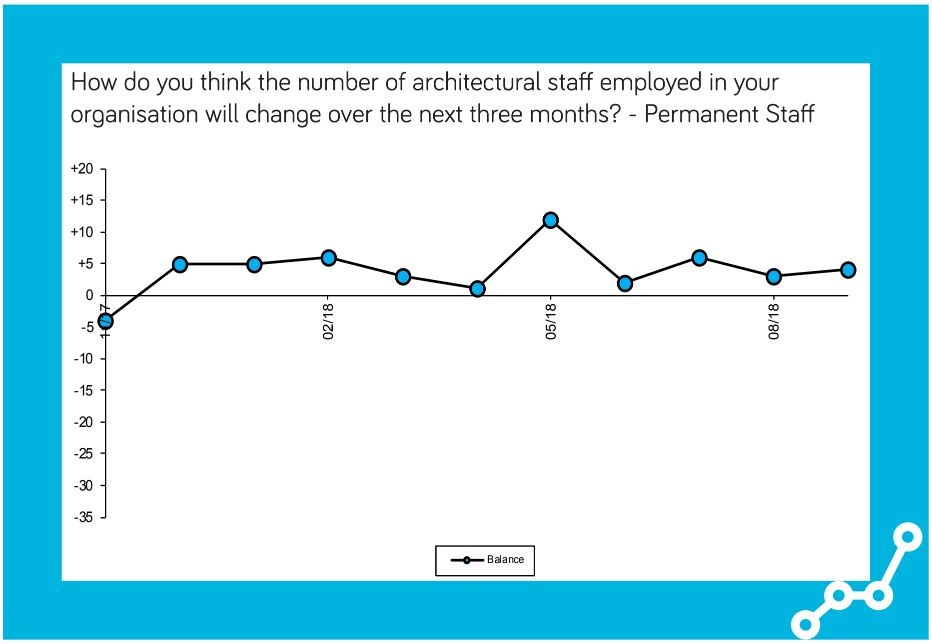
Commentary received from our participating practices continues to suggest a fairly steady but highly competitive market for architectural services.

A significant number of our practices continue to highlight a growing hesitancy on the part of clients to allow projects to proceed to construction, with many citing uncertain conditions created by Brexit as a the dominant factor which is continuing to cloud overall sentiment.

In recent months practices in the North of England and the Midlands and East Anglia have been noticeably more upbeat than those in London and the South of England, but this north-south difference has now started to narrow considerably.

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 260 practices took part in the Survey in September 2018. 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.