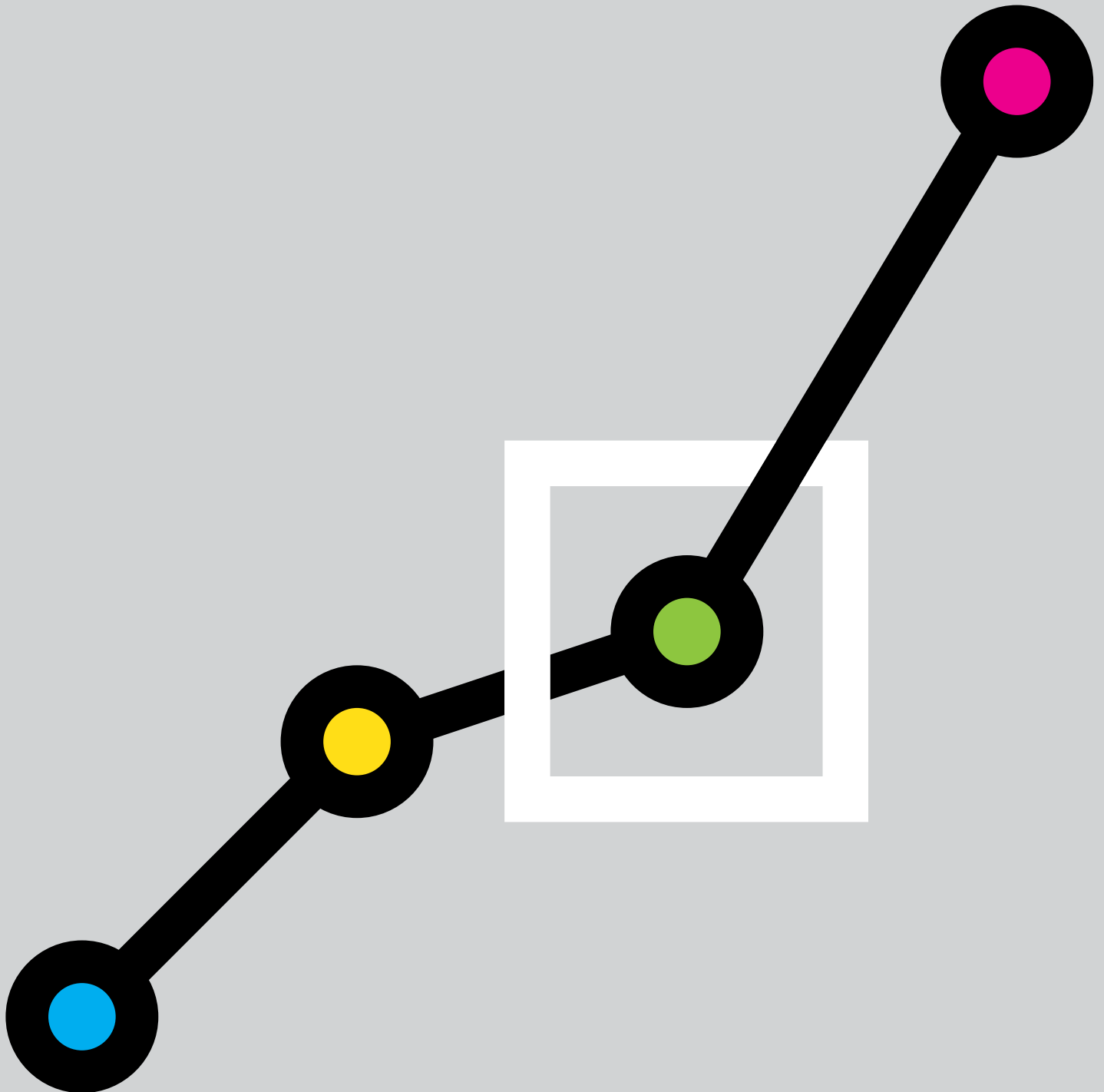


# Future Trends Survey:

July 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 July 2021 survey returns.

### RIBA Future Trends Workload Index (July 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	9
Stay the same	55
Increase	36
<b>TOTAL</b>	<b>100</b>
<b>Balance</b>	<b>+27</b>

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

In July, the RIBA Future Trends Workload Index remained in strongly positive territory, returning a balance figure of +27. This is a four-point decrease on June's balance figure of +31. However, architects remain very positive about future workloads. Actual workloads are now 12% up on a year ago.

Whilst some sectors, regions and practice sizes have seen confidence moderate somewhat, the overall picture remains strong.

Thirty-six per cent of practices expect workloads to grow in the coming three months, whilst over half (55%) expect them to remain the same. The percentage expecting workloads remains less than one in ten (9%).

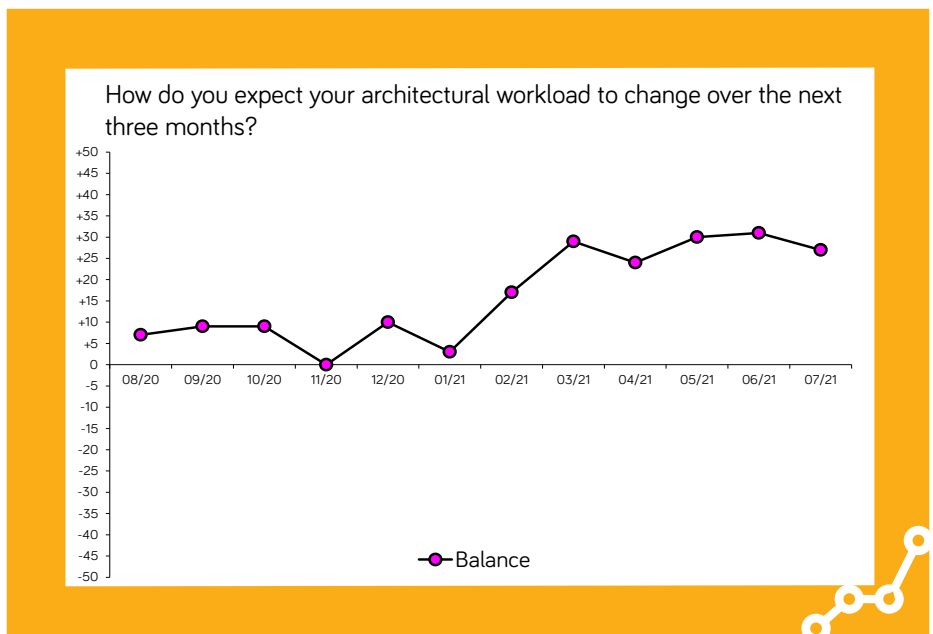
Workload is expected to increase in three of the four workloads sectors, suggesting broad-based growth to come. Workloads are set to increase in Private Housing, Commercial, and the Public Sector. Pessimism about future work is only to be found in the community sector.

All regions continue to expect workloads to increase in the next three months, as do all practice sizes.

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 July 2021 RIBA Future Trends Workload Index in terms of practice size, region and sector:

The outlook of **Small practices** (1 - 10 staff) continues to be optimistic but has moderated slightly. In July, small practices posted a future workload balance figure of +24, a four-point reduction in June's balance figure of +28.

Confidence among **Large and Medium-sized practices** (11 - 50 and 51+ staff) fell slightly in July. In July, the balance figure among Large and Medium-sized practices was +47, down from June's figure of +56. This slight fall is a result of more practices expecting workloads to hold steady, only 3% expect workloads to fall.

expect workloads to grow over the next three months.

Optimism in the capital has fallen, with a balance figure of +17, down 11 points from June's figure of +28. Nevertheless, this is the fifth month in a row that London has reported an expectation of increasing workloads.

In contrast, optimism in the South of England rose sharply this month, with a balance figure of +33, an increase of sixteen points from last month's figure of +17.

Expectation about future workloads effectively held steady in the Midlands & East Anglia, with an index figure of +27, down just 1 point from June's figure of +28.

Confidence in North of England is high but has moderated this month, with a balance figure of +36, down from +49 in June.

Wales & the West at +28 has also seen confidence fall back, with a fall (from +45 in June).

Each of the four sectors saw variations on last month's figures. However, the overall picture remains consistent; a broad-based recovery in workload, led by Private Housing, but excluding the Community Sector.

In July, the **private housing sector** posted a balance figure of +28, effectively unchanged from last month's figure of +27. The sector remains strongly positive, with 38% expecting further workload growth to come.

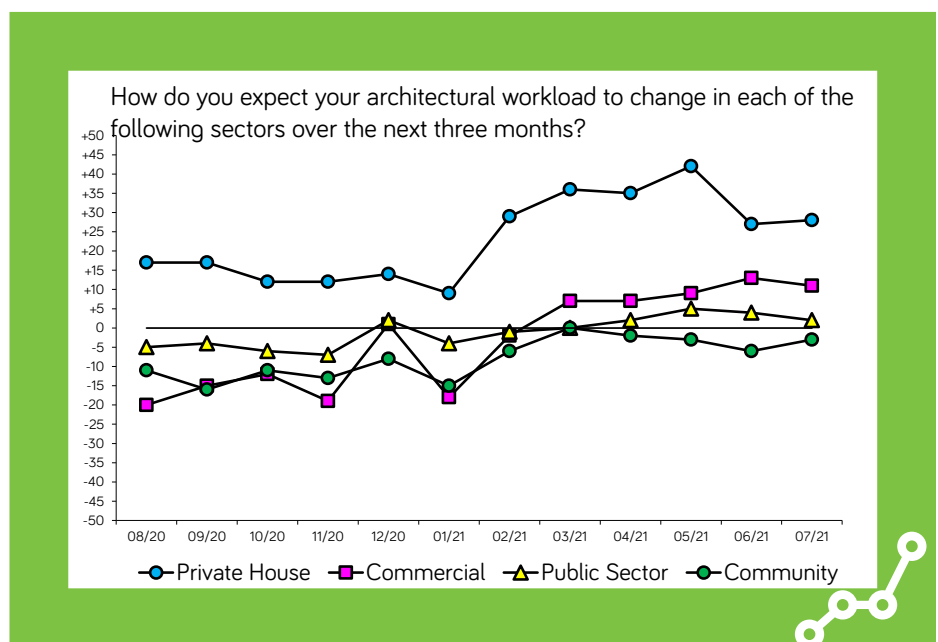
The **commercial sector** posted a balance figure of +11 down two points from June's figure of +13.

With a balance figure in July of +2, expectations about future work in the **public sector** remain positive, but only just.

The **community sector** remains in negative territory, posting a balance figure of -3. The sector has returned a negative or zero balance figure for 17 successive months.

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

For the fifth successive month, all regions



**RIBA Future Trends Staffing Index**  
(July 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	77
Increase	18
TOTAL	100
<b>Balance</b>	<b>+13</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 +13, the RIBA Future Trends Permanent Staffing Index rose slightly, increasing by two balance points from last month's figure of +11.

Overall, eighteen per cent of practices expect to employ more permanent staff over the coming three months, whilst 5% expect to employ fewer. Seventy-seven per cent expect staffing levels to stay the same.

Staff recruitment is expected to be especially strong among Medium and large-sized practices (11+ staff), with a balance figure of +46. In the coming three months, half of these practices expect to grow their pool of permanent staff.

With a balance figure of +8, small practices (1 - 10 staff) also anticipate growing staff levels.

Looking at the regional staffing picture, all regions are positive, though London and the South are somewhat less so.

With a balance figure of +8, (up 3 points on June's figure), London continues to be positive about future staffing levels. At +7 the South of England has posted a similar figure.

Despite a strong showing in the South and the capital, the need for staff is likely to be greater elsewhere. The Midlands & East Anglia (+16), the North of England (+17), and Wales & The West (+18) all remain strongly positive about the future jobs market.

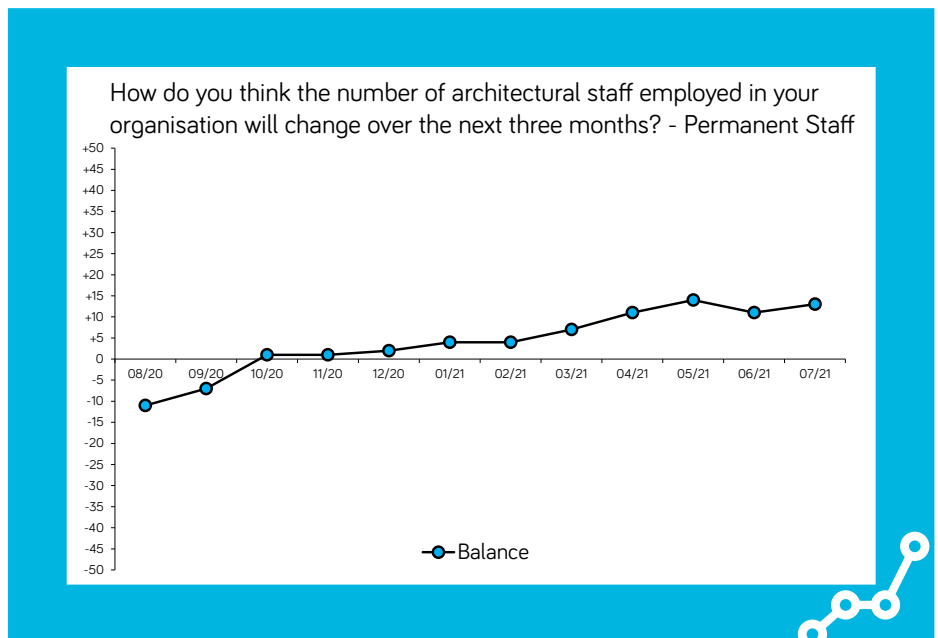
The Temporary Staffing Index dipped very slightly returning a balance figure of +7 July, down one point from June.

Personal underemployment rose very slightly and now stands at a to 16%.

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



## RIBA Future Trends (July 2021)

Overall, the July Future Trends survey shows a sustained and broad-based confidence among the profession, as the effects of the pandemic look to be fading, and the recovery gathers pace.

Practices are reporting healthy enquiry levels and projects “booked in” for up to a year ahead. Many practices are actively recruiting to meet the new levels of demand.

Significant issues remain, however.

Commentary from practices highlights the continued challenges (explored last month) around product availability and the attendant inflationary pressures this brings.

Obtaining affordable and suitably comprehensive Professional Indemnity Insurance is a significant issue for many practices. The RIBA receives reports of prohibitive cost increases, and added insurance exclusions preventing work on some projects (including basements and buildings with cladding).

Site labour and practice staffing levels are being affected by Covid-19 infections and the associated self-isolation requests.

Some practices are beginning to report difficulties in recruiting staff, with a suggestion that this is exacerbated by the furlough scheme serving to dampen staff movement.

For several months, the RIBA has also been receiving reports of the speed of the planning application process causing delays to projects. This is not about the planning decisions themselves, nor the criteria for granting planning permission (though, of course, these can be issues too). Instead, it is about the speed of the administrative processing of applications.

In July’s Future Trends, we asked whether delays in the processing of planning applications by Local Authorities has caused project delays. The findings are:

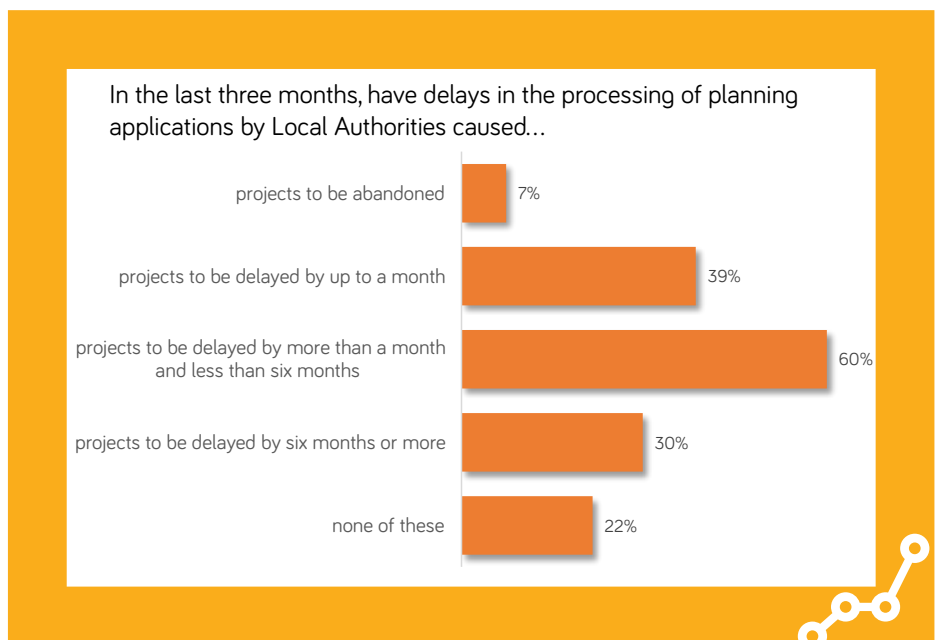
- Seven per cent report some projects being abandoned
- Thirty-nine per cent report some projects being delayed by up to a month
- Sixty per cent report some projects being delayed by between one and six months
- Thirty per cent report some projects being delayed by six months or more
- Twenty-two per cent report no projects delayed or abandoned

The following graph plots the effects of the processing of planning applications:

The combination of these issues may yet put a break on future architect’s confidence and workloads.

### 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 221 practices took part in the Survey in July 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.