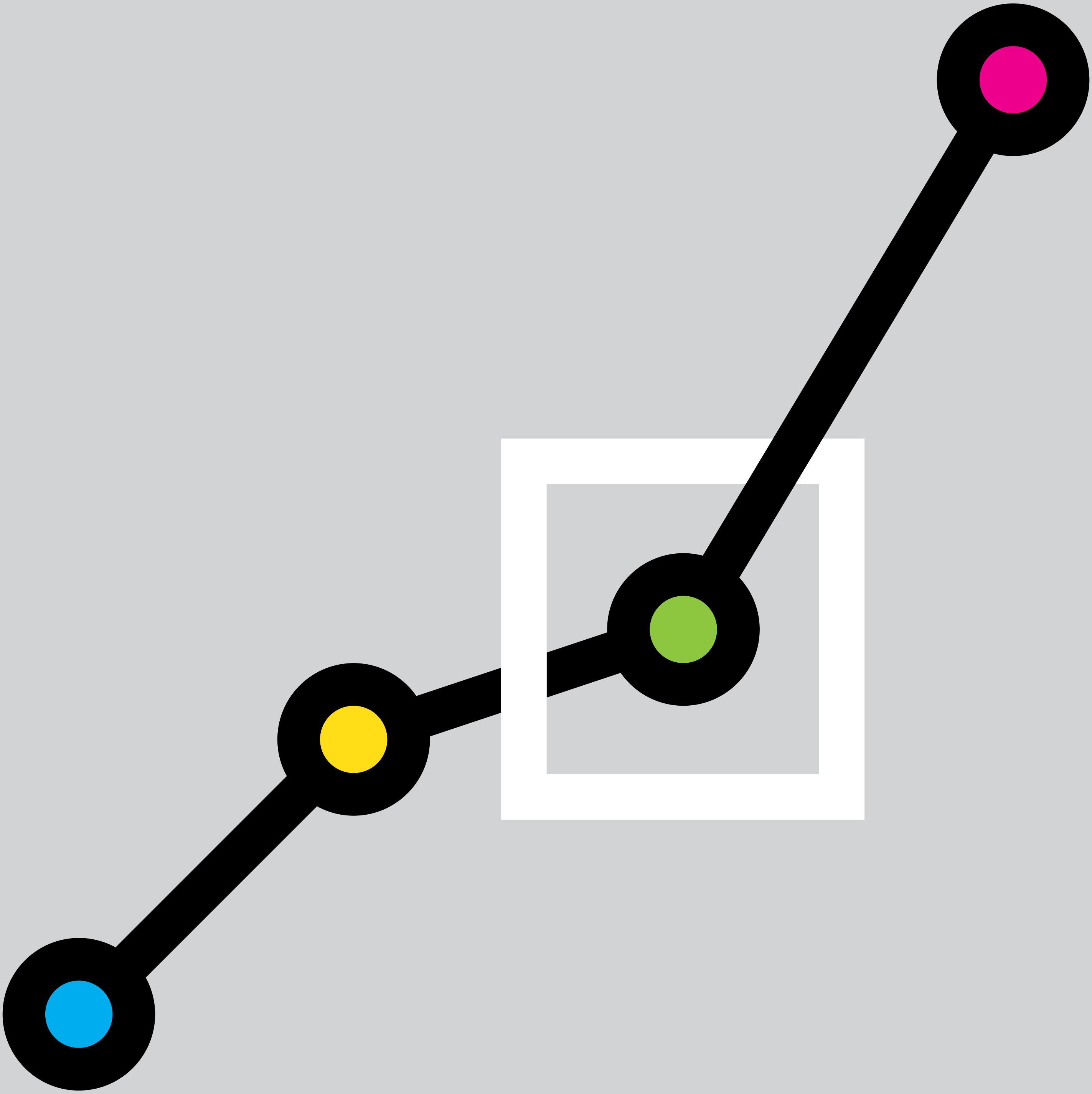
Future Trends Survey:

April 2025



RIBA

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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 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

RIBA Future Trends April 2025:
Overview

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	22
Stay the same	53
Increase	25
TOTAL	100
Balance	+3

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

The profession's outlook for future work remained positive in April, although expectations have softened somewhat overall, due to a fall in confidence among smaller practices.

The RIBA Future Workload Index posted a +3 balance score in April, a decrease of four points from March's +7 figure. A positive balance indicates that practices, overall, expect workloads to increase during the next three months.

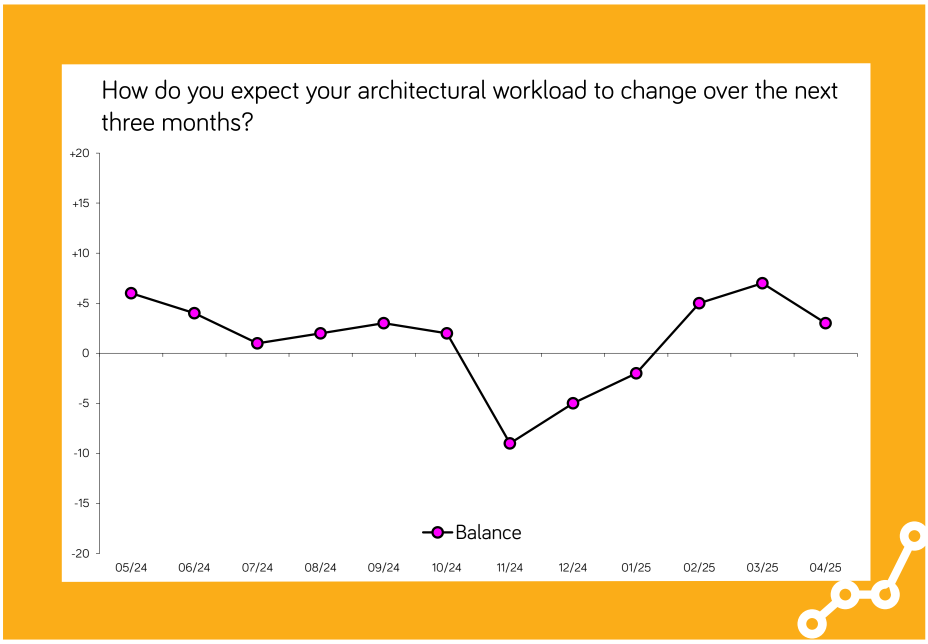
Twenty-five per cent of practices anticipate an increase in workloads, while 22% expect a decline. Fifty-three per cent expect workloads to remain stable.

All but one region expects workloads to rise. The Residential and Commercial sectors are expected to grow. However, current workloads remain lower than a year ago. The average practice workload has decreased by 8% over the past twelve months.

The RIBA Permanent Staffing Index shows that, on balance, more practices intend to increase rather than reduce the number of permanent staff over the coming three months. However, average practice staff levels are reported to be around 3% lower than twelve months ago.

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.



RIBA Future Trends April 2025:
Workload Index: Analysis by Practice Size, Region, and Sector.

In April, the outlook for **small practices** (those with 1 to 10 staff) deteriorated, falling by eight balance points from +6 in March to -2* in April. A negative figure indicates an overall expectation of reduced workloads.

Twenty-four per cent of small practices anticipate workloads increasing in the next three months, 25% expect a decrease, and 51% anticipate no change.

In contrast, the outlook for **large** (51+ staff) and **medium-sized practices** (11 -50 staff) remains positive. Their combined Workload Index rose to +16* in April, up seven points compared with March. Twenty-nine per cent expect workload growth, 14% anticipate contraction, and 57% expect no change.

Overall, the **regional** outlook remains positive, although the South of England has slipped into negative territory. London is currently the most optimistic region.

London's Workload Index rose to +12 in April, up from +8 in March. The Midlands and East Anglia also saw confidence improve, with the region's Index rising from +5 to +10.

The North of England and Wales and the West have seen optimism soften, although both regions continue to expect workloads to grow. The North of England's Index fell from +12 to +1, while in Wales and the West, the Index declined from +8 to +5.

The South of England is the only region to anticipate falling workloads this month. Its Index fell from +1 in March to -14 in April; a large, 15-point, drop.

The **sectoral outlook** has weakened slightly overall, although two of the four sectors remain positive about future workloads.

The **private housing** sector remains positive for the third month, with a +6 Workload Index. However, this is a 5-point decline compared with March's +11 figure.

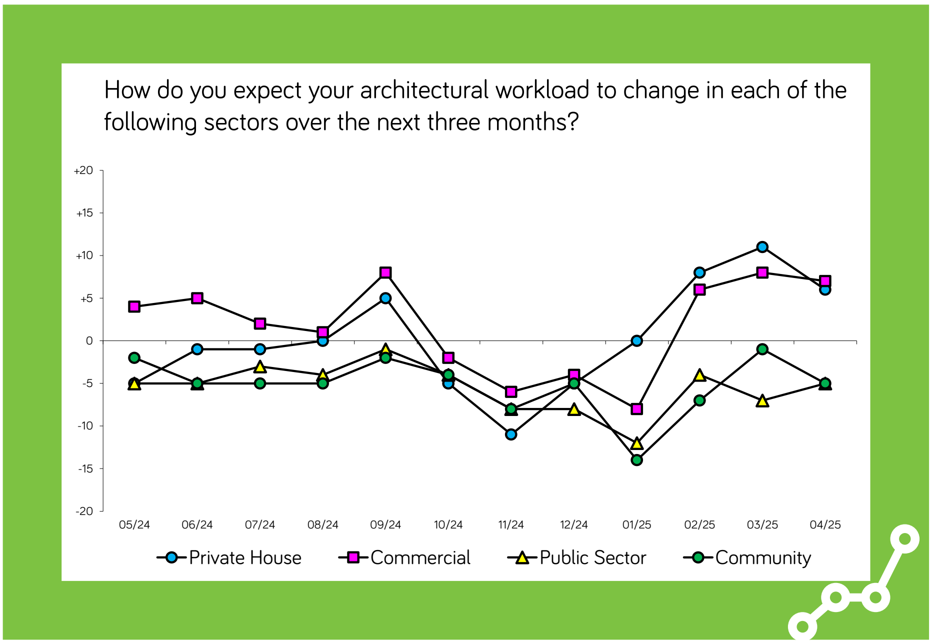
The outlook for the **commercial sector** also remains positive. This month sees the sector post a +7 figure, down one point compared with last month.

Workload expectations for the **community sector** have also deteriorated, with a balance figure of -5 in April, compared with -1 in March.

The outlook for the **public sector** has improved slightly this month but remains negative. The sector's Index rose to -5 in April, up from -7 in March.

** 'Increase' minus 'Decrease' does not equal the 'Balance' figure due to rounding.*

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



RIBA Future Trends April 2025:
Staffing Index.

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	71
Increase	16
TOTAL	100
Balance	+4

(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 Permanent Staffing Index stands at +4 this month, having risen by four index points.

On balance, practices expect permanent staffing levels to increase over the next three months. Sixteen per cent of practices anticipate an increase in permanent staff over the next three months, while 12% expect a reduction and 71% expect no change.

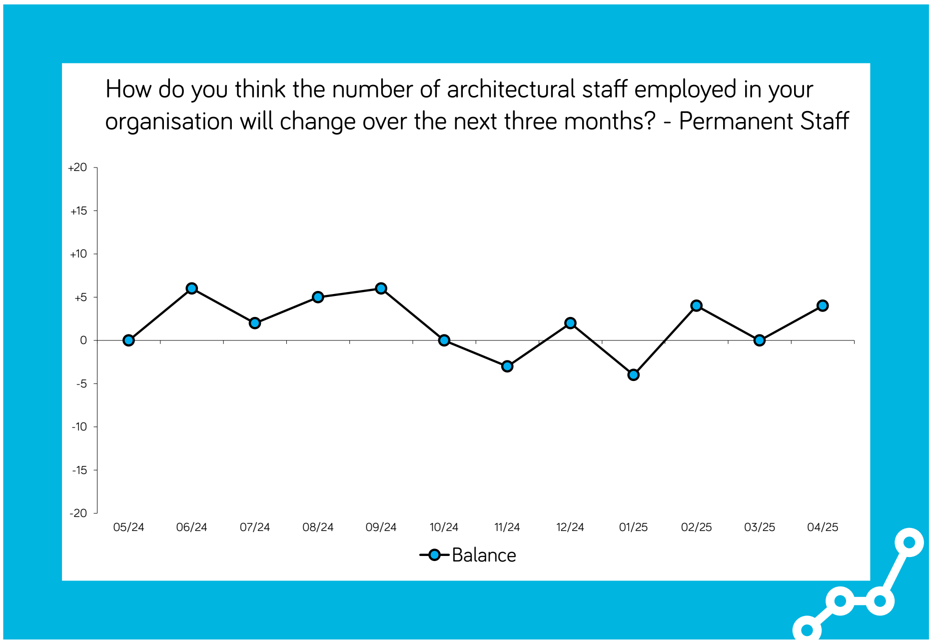
Regionally, the staffing outlook is positive in London (+10), the Midlands & East Anglia (+11), Wales & The West (+5), and the North of England (+2). The South of England is the only region where practices expect staffing levels to decline, with a Staffing Index figure of -7.

Small practices (1–10 staff) are less likely to anticipate permanent staff recruitment, with a -1 Staffing Index. Large and medium-sized practices (11+ staff) are significantly more optimistic, with a combined Index of +15.

The RIBA Temporary Staffing Index fell from +6 in March to -1 this month, suggesting a shift from temporary to permanent recruitment.

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 April 2025: Commentary.

With April's data catching the first impressions of the global trade instability brought on by the Trump Tariffs, the profession has seen a dip in confidence but remains resilient in its positive outlook.

The outlook for the Commercial and Residential markets is holding up. Together these sectors make up the majority of RIBA Chartered Practice work, by value. However, anticipated investment in public sector work has yet to show in architects' expectations.

All but one region is positive about future work. London, which generates the largest proportion of UK practice fee revenue, is the most positive.

Small practices continue to describe a more challenging market, with a negative outlook for both workloads and staff this month, in contrast to the optimism of Medium and Large-sized practices.

The Workload Index for early 2025 compares favourably with the same period last year. The average Workload Index for the first four months of 2025 is +3, up from -2 for the same period in 2024.

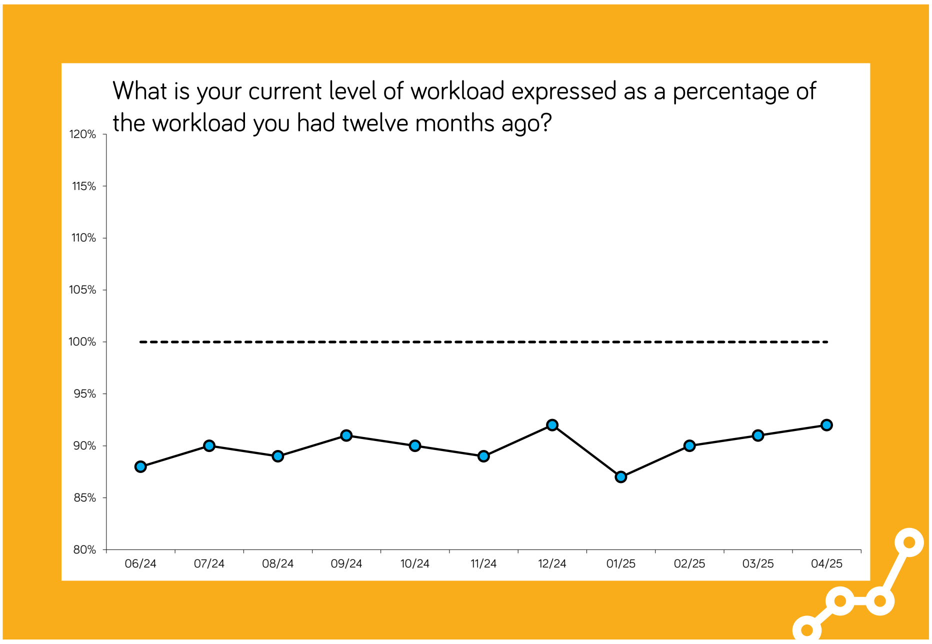
That said, the effects of global trade uncertainty are yet to fully play out, with some suggesting it is dampening architects' outlook.

Overall, commentary from practices gives a mixed picture.

Some report that the market continues to be highly challenging and intensely competitive, with few enquiries, and a poor pipeline of work. Project delays, regulatory changes, and late payment of fees continue to be reported.

In contrast, other practices describe an increasingly buoyant market, an uptick in private residential work, and an rise in new enquiries and their subsequent conversion.

Some practice report increasingly and successfully turning to overseas markets to procure work.



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 339 practices took part in the Survey in April 2025.
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.