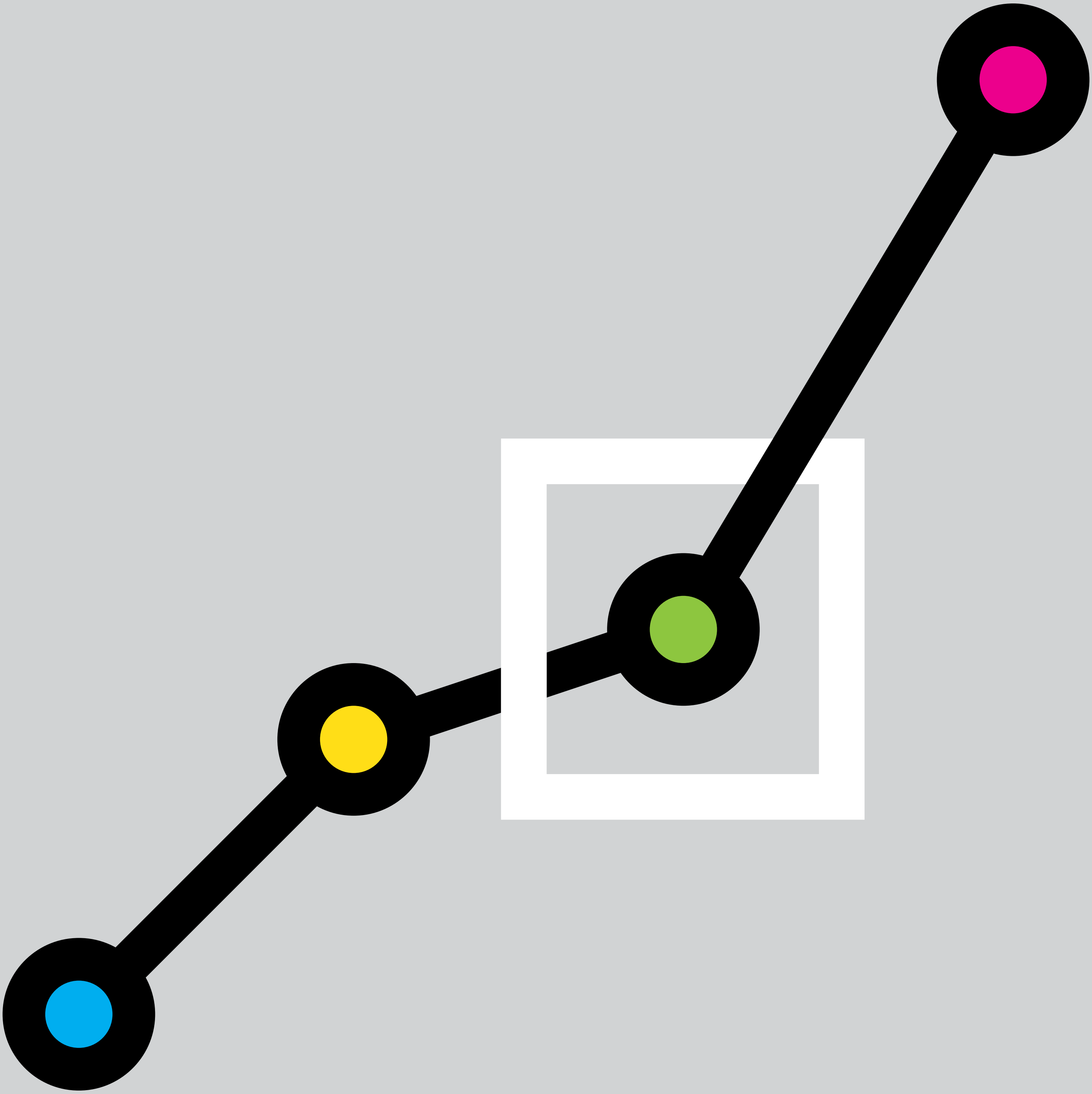
Future Trends Survey:

August 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 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 August 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	23
Stay the same	53
Increase	24
TOTAL	100
Balance	**+2***

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

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

While remaining positive overall, the near-term outlook for architects' workloads has fallen this month, driven by an ongoing deterioration in the outlook for the private housing sector. The August RIBA Future Workload Index stood at +2, a seven-point fall compared with last month's +9.

A positive balance indicates that, overall, practices expect workloads to increase during the next three months.

Twenty-four per cent of practices anticipate an increase in workloads, while 23% expect a decline. Fifty-three per cent expect workloads to remain stable.

All regions continue to expect workloads to grow.

Looking at the outlook by sector, the Commercial sector remains comparatively strong, but the outlook for the three other monitored sectors has become negative.

Current workloads remain lower than a year ago. The average practice workload has decreased by 13% over the past twelve months.

Although somewhat weakened, the positive outlook for both permanent and temporary staffing levels has continued this month.

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 August 2025:
Workload Index: Analysis by Practice Size, Region, and Sector.

In August, the outlook for **small practices** (those with 1 to 10 staff) fell back into negative territory, with the small practice Workload Index posting a -5 figure, down from +2 in July.

Twenty per cent of small practices anticipate an increase in workloads in the next three months, 25% expect a decrease, and 54% anticipate no change.

In contrast, the outlook for **large** (51+ staff) and **medium-sized practices** (11 -50 staff) has again improved and remains strongly positive, with a combined Workload Index of +38 in August, up from +34 in July. Forty-six per cent expect workload growth, 8% anticipate contraction, and 46% expect no change.

The **regional** outlook remains positive in all areas, with confidence increasing in some regions and falling in others.

London's Workload Index rallied strongly this month, with a +14 workload index, up 13 points compared with last month. The North of England has also seen an increase in optimism, with its Index figure rising from +10 in July to +22 in August.

All other regions have seen a fall in confidence this month. The Workload Index for the Midlands and East Anglia fell from +14 in July to +1 in August. For Wales and the West, the Index fell from +22 to +8, and in the South of England, it fell from +5 to +1.

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The **sectoral outlook** has seen some significant falls this month, with three of the four sectors now anticipating contracting workloads in the next three months.

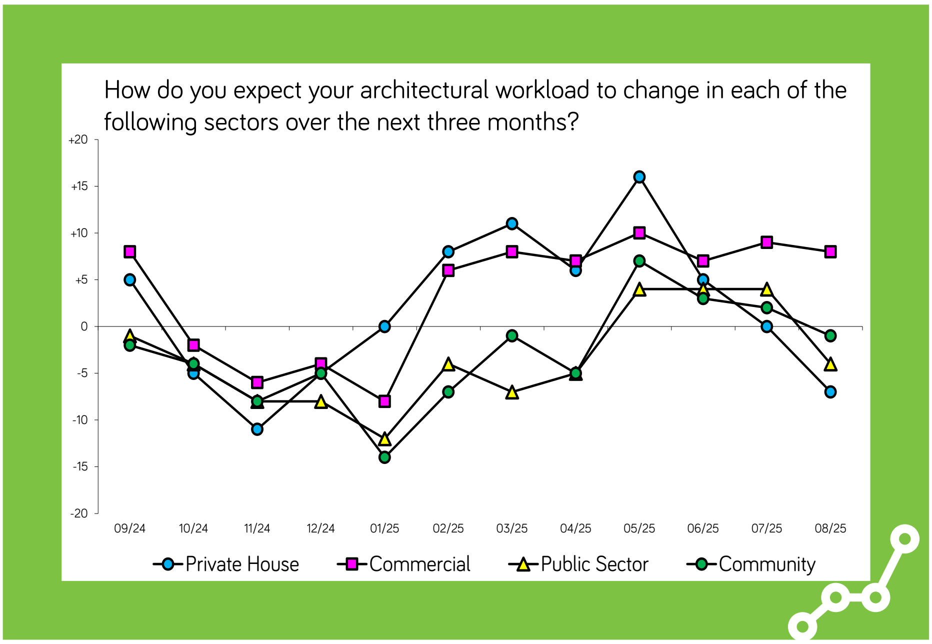
Confidence in the **private housing** sector has fallen again. From a high of +16 in May, the sector's Index now stands at -7, as practices, on balance, expect housing workloads to contract in the next three months.

The outlook for the **public sector** has fallen back into negative territory, with a Workload Index of -4 in August, following a +4 figure in July.

Workload expectations for the **community sector** have also slipped back into negative territory, with an Index figure of -1 in August, down from +2 in July.

In contrast, the outlook for the **commercial sector** remains positive and has held broadly steady, with a Workload Index of +8, down one point compared with July.

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



RIBA Future Trends August 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	11
Stay the same	75
Increase	14
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.)

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

The **RIBA Future Trends Permanent Staffing Index** stands at +4 this month, down 4 points compared with last month.

The positive Staffing Index reflects practices expecting permanent staffing levels to increase over the next three months, on balance. Fourteen per cent of practices anticipate an increase in permanent staff over the next three months, while 11% expect a reduction and 75% expect no change.

The staffing outlook is again positive in all but one region this month.

Staffing levels in the South of England are expected to remain stable over the next three months, as the Staffing Index has dropped to a zero balance.

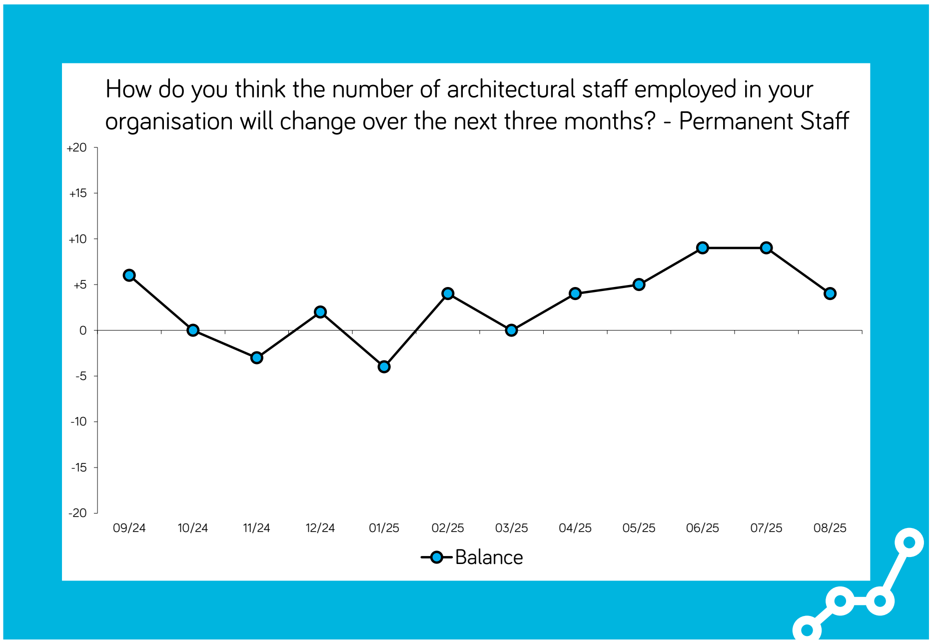
All other regions returned positive Staffing Index figures: London and the Midlands & East Anglia both returned a +5 balance figure, Wales & the West +19, and the North of England +20.

The staffing outlook among Large and Medium-sized practices (11+ staff) is increasingly positive, with a combined Index of +39. Small practices (1–10 staff) are pessimistic about future staffing levels, however, with a -3 Staffing Index this month.

The RIBA **Temporary Staffing Index** is also positive this month at +3.

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 August 2025: Commentary.

The August RIBA Future Workload Index shows a profession becoming more measured in its outlook, with the headline figure falling to +2, down from +9 in July. While this still indicates overall growth expectations, the fall reflects growing concern, particularly for the private housing sector, and among smaller practices.

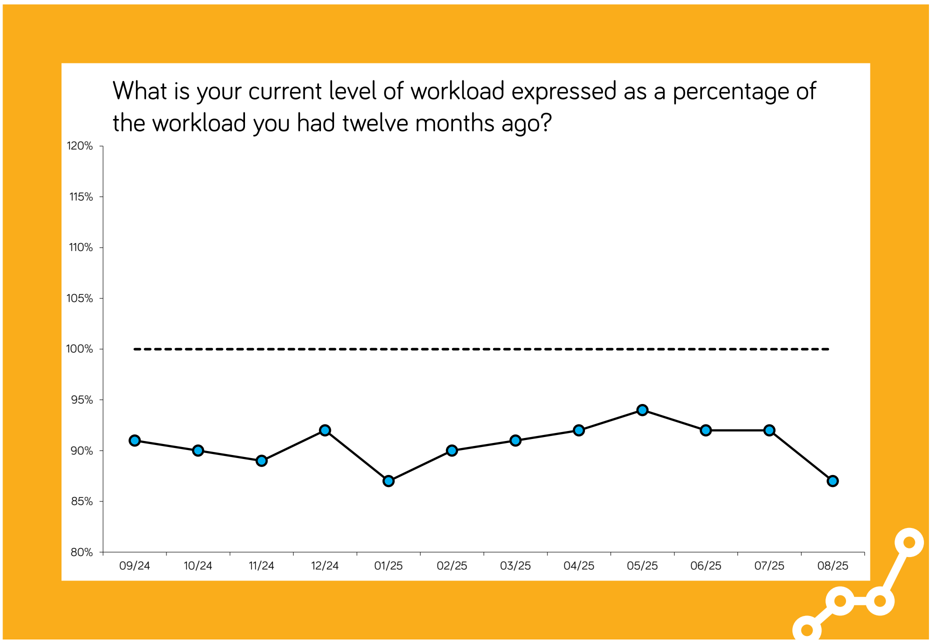
Small practices are increasingly pessimistic, with their Workload Index turning negative while medium and large practices remain firmly optimistic.

The sector-specific data is the most concerning. While the commercial sector, a significant source of revenue for medium to large practices, is proving resilient, the private housing sector, the largest revenue source for smaller practices, has shown a sharp decline. The public and community sectors have also slipped into negative territory.

Commentary received this month is downbeat overall, as practices describe a period of decline in project activity and new enquiries. Downward pressure on work is coming from rising costs, weakened client confidence, a stagnant economy and increased regulatory burdens, including the Building Safety Act. Planning delays are consistently reported to be a major barrier to project progress.

Nevertheless, some practices are cautiously optimistic about future work, expecting workloads to improve after the summer. Recruiting to meet workloads is a challenge for some.

The following graph plots the current level of workload expressed as a percentage of the workload of twelve months ago.



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 August 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.