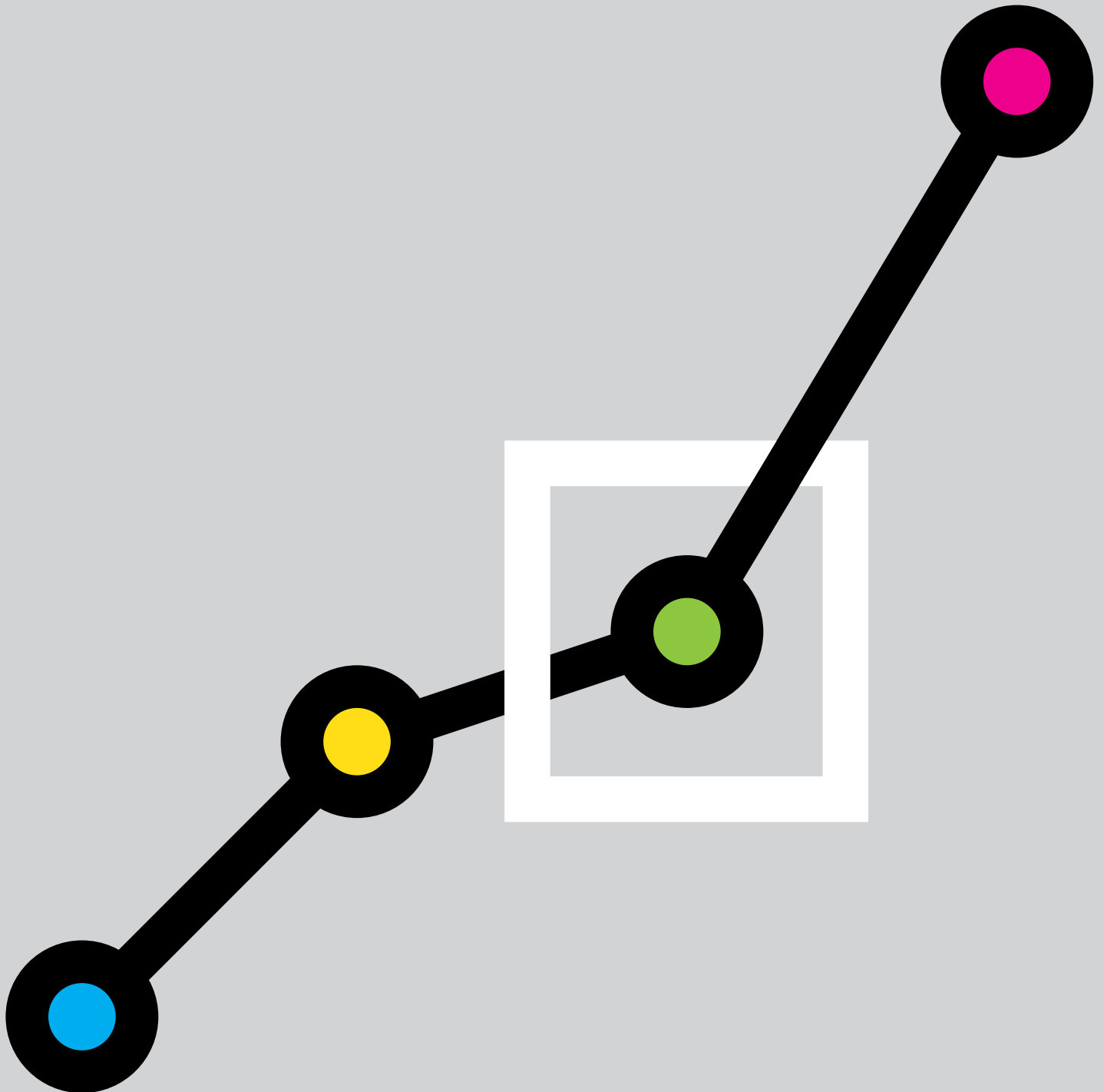


# Future Trends Survey:

February 2023



## 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](http://www.architecture.com)

The following is a summary analysis of the results from the February 2023 survey returns.

### RIBA Future Trends Workload Index (February 2023)

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	24
Stay the same	48
Increase	28
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.)

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

#### 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 February, the RIBA Future Trends Workloads Index returned a score of +5, indicating that, on balance, practices expect workloads to grow in the coming three months. After six months in negative territory, this is the first time the Index has been positive since July 2022.

Over a quarter (28%) of practices expect workloads to increase in the coming three months, and forty-eight per cent expect them to remain the same. Twenty-four per cent expect workloads to decrease.

The outlook for small practices (1 - 10 staff) has improved this month to a zero balance, indicating workloads are anticipated to hold steady. Large and medium-sized practices (11+ staff) are increasingly optimistic.

Three of the four monitored work sectors have improved this month, although all remain in negative territory.

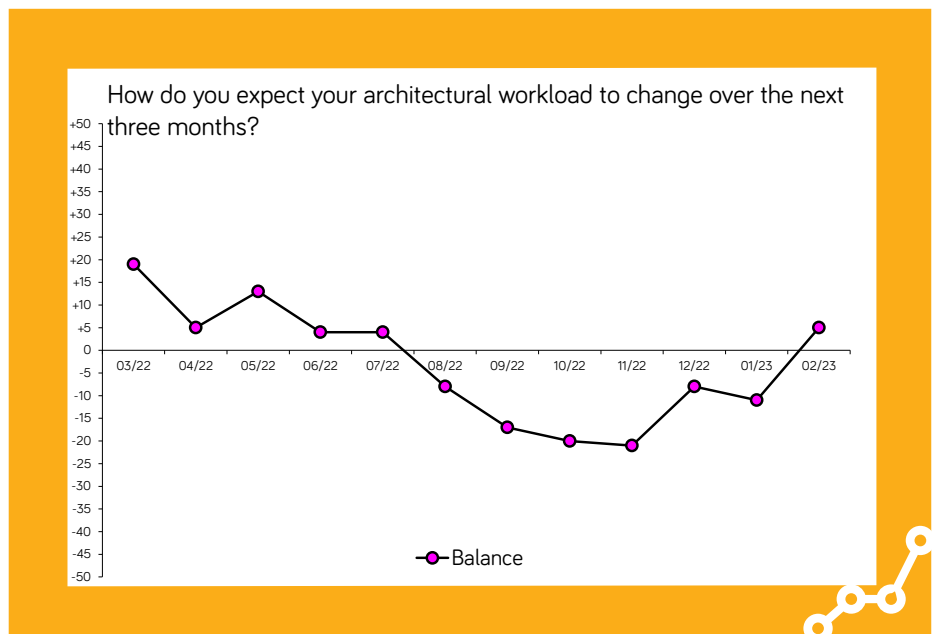
All regions showed an improved outlook this month, with only London returning a negative Workload Index figure.

Despite an improved outlook for future work, current workloads remain 8% lower than they were a year ago.

Eighteen per cent of respondents reported personal underemployment this month, slightly lower than last.

The Staffing Index remains positive, suggesting growing staff levels in the coming months.

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



Looking at the February 2023 RIBA Future Trends Workload Index in terms of practice size, region and sector:

After six months of a negative outlook, the outlook among **small practices (1 - 10 staff)** has increased by 14 points this month to return a 0 (zero) workload index figure. Around a quarter of small practices (24%) expect workloads to grow, and the same proportion expects workloads to contract.

**Large and medium-sized practices (11+ staff)** have shown a positive and improving outlook, with a combined balance figure of +31, with large practices (50+ staff) tending to be the most positive about future work.

The outlook for future work has improved across the county.

Having fallen into negative territory last month, London posted a -2 balance figure of in February, a three-point improvement on last month's -5. London is the only region to have a negative view of future work.

The South of England posted a 0 (zero) balance this month after 7 months with a negative outlook.

The Midlands & East Anglia (+21), the North of England (+14), and Wales & the West (+7) all saw their regional outlooks improve this month. The recovery in outlook is coming from outside the South East.

All the monitored work sectors continued to post negative Index figures this month, although three of the four sectors show an improved outlook.

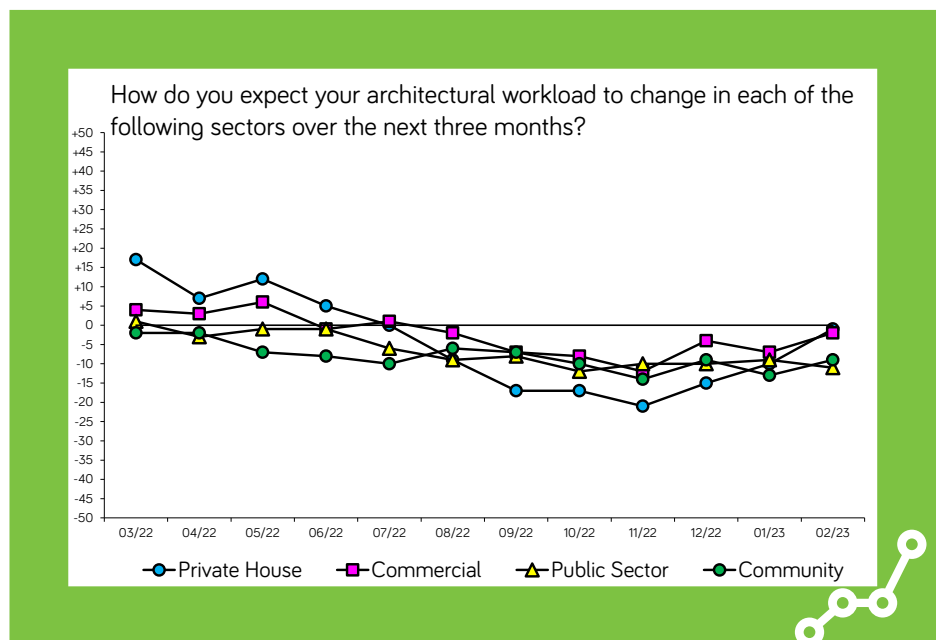
The **private housing sector** has again improved this month, rising 9 points to post a balance figure of -1. The sector has seen a 20-point rise since the recent nadir of -21 in November 2022.

The **commercial sector** rose 5 points in February, returning a figure of -2, up from -7 last month.

The **community sector** outlook has picked up a little, but is still firmly negative, with a balance score of -9, a month-on-month rise of 4 points.

The only outlook to deteriorate in February is that of the **public sector**, with a balance figure of -11, down 2 points from last month's -9.

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



**RIBA Future Trends Staffing Index**  
(February 2023)

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

Permanent Staff	%
Decrease	10
Stay the same	77
Increase	13
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 Permanent Staffing Index remains positive this month, albeit with a slight softening of outlook. At +3, the Staffing Index has lost two points this month.

Ten per cent of practices expect to employ fewer permanent staff over the coming three months, and thirteen per cent expect to employ more. Seventy-seven per cent expect their permanent staffing levels to stay the same.

The expectation for increased staffing levels is concentrated in medium and large practices (11+ staff), and outside London and the South.

Medium and large-size practices (11+ staff) remain positive about recruiting staff, with a combined Staffing Index figure of +26. In contrast, small practices (1 - 10 staff) expect staff levels to decrease, with an Index of figure -2.

Most regions continued to report an improved staffing outlook this month.

London (Staffing Index -2) returned to negative territory this month after a positive outlook in January. At -10, the staffing outlook in the South of England is also negative and has deteriorated further since January.

Other regions are faring better.

Wales & The West (+7) maintained its positive outlook for permanent staff. Employment prospects in the North of England (+7) and The Midlands & East Anglia (+10) continue to recover with an overall expectation of growing staffing levels.

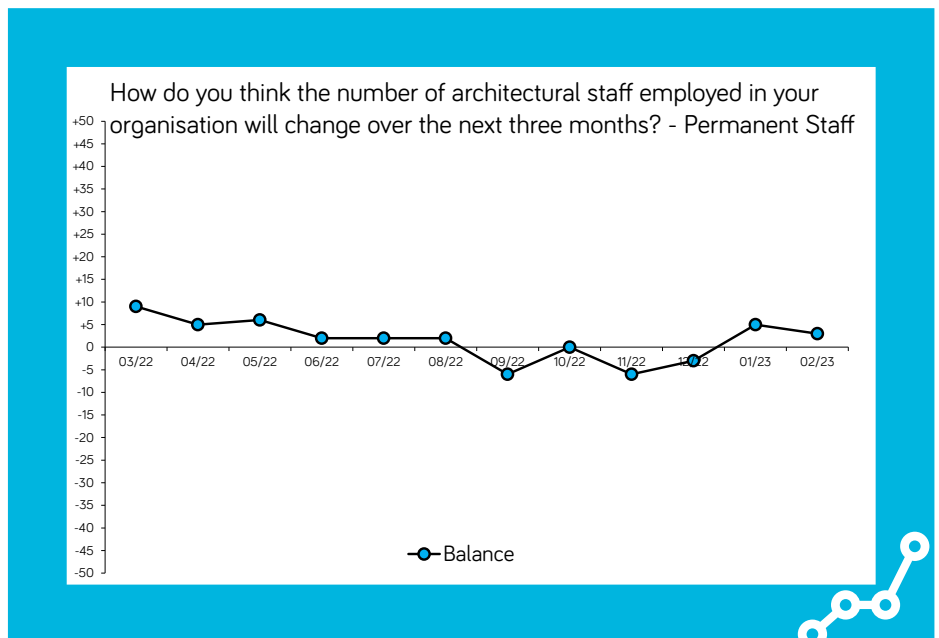
The Temporary Staffing Index rose to -2 this month, a rise of 4 points, but still negative.

Levels of personal underemployment have fallen slightly this month, with 18% reporting personal underemployment, compared to 20% in January.

**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: Focus on our current EU Trading Arrangement**  
(February 2023)

In January 2021, RIBA Future Trends mapped the expected effects of our then-new trading arrangement with the EU. At the time, architects expected our leaving the EU to reduce architectural workload; 15% more expected it to lead to a decrease in workload rather than an increase.

At the time, areas of concern included:

- The standards and regulatory environment
- Availability of skilled on-site staff
- Recruiting/retaining architects from outside the UK
- Availability of building materials
- Finding new global opportunities

All of these were expected to worsen because the UK left the EU.

Two years on, RIBA Future Trends revisited the question. In that time, architects' assessment of our current trading arrangement with the EU has deteriorated, and there is a widely shared view that the status quo is hampering the profession.

Overall, what effect do you think the trading arrangements with European Union will have upon the future workload of your practice over the next 12 months?

Effect of current trading arrangement on Future Workload	%
Decrease	21
Stay the same	77
Increase	1
TOTAL	100
<b>Balance -20</b>	

Twenty per cent more architects expect the UK's post-Brexit EU trading arrangement to lead to a decrease in workload, rather than an increase. Only 1% see it leading to an increase in workload.

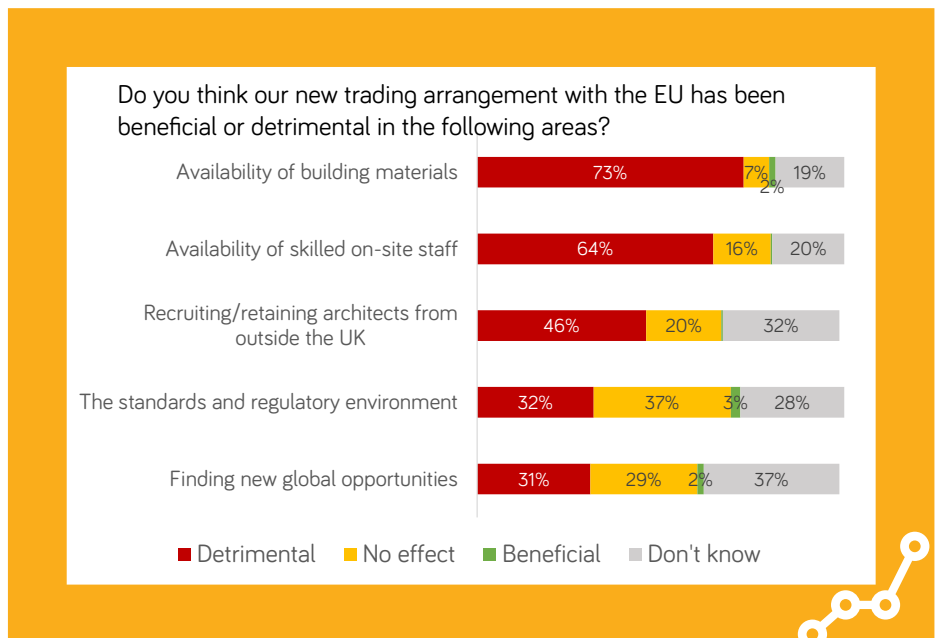
The graph below shows that practices view the current trading arrangement as being especially detrimental to the availability of building materials, of skilled on-site staff, and recruiting/retaining architects from outside the UK.

The following graph plots architects' assessment of the effects of our current trading arrangement with the EU:

EU trading arrangements aside, February's Future Trends Report marks a welcome return to positive territory for the RIBA Future Trends Workload Index. It has been a difficult and uncertain few months for many practices, and a welcome level of market stability seems to be taking hold.

With a recession still on the cards for the UK, and challenges for the profession remaining, the coming months are likely to remain challenging. However, the near-term prospects for architects look better than they have been for several months.

The commentary received in February reflects growing confidence, with some practices reporting an increase in enquires, more new commissions, and an uplift in clients deciding to move ahead with projects



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 237 practices took part in the Survey in February 2023. 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.