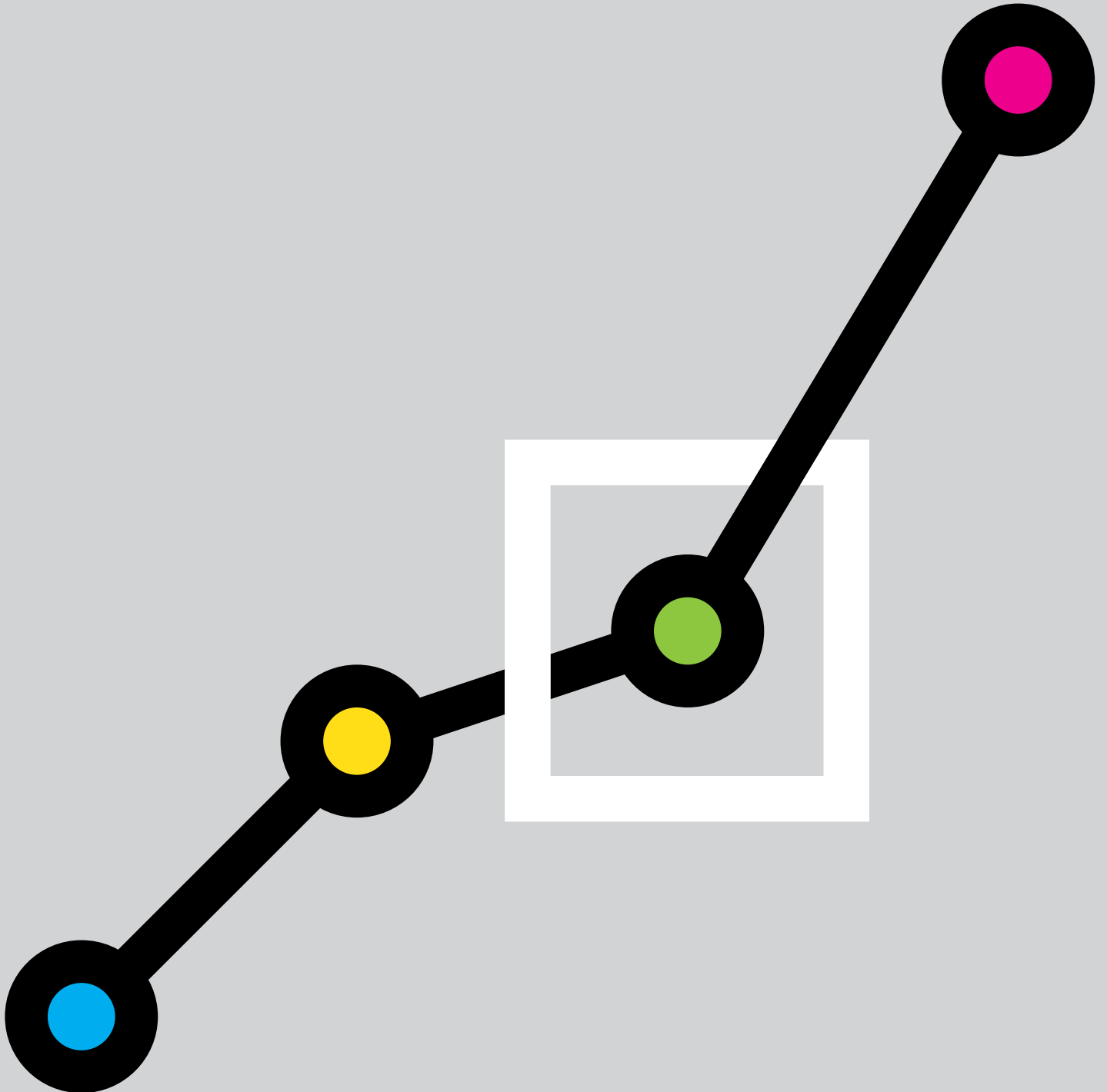


Future Trends Survey:

February 2025



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 February 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	24
Stay the same	47
Increase	29
TOTAL	100
Balance	+5

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

February sees the profession's outlook for future work become positive after three months of a gradually improving but negative outlook.

February's RIBA Workload Index rose seven balance points to +5, following January's figure of -2.

A positive balance indicates an overall expectation among architects that workloads will increase in the coming three months.

Twenty-nine per cent of architects' practices anticipate an increase in workloads over the next three months, while 23% expect a decline. Forty-seven per cent expect workloads to remain stable.

All but one region has seen an improvement in outlook, with most now expecting growing workloads.

The outlook across all four monitored work sectors has improved, with rising workloads now expected in both the residential and commercial sectors.

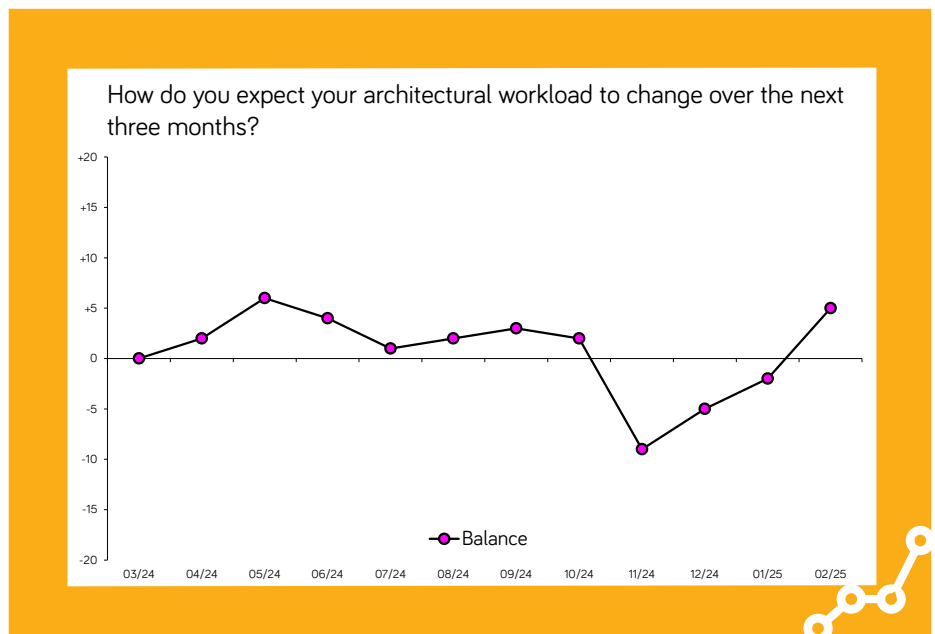
Nevertheless, current workloads remain lower than they were a year ago. The average practice workload has decreased by 10% compared with twelve months ago.

At +4, the RIBA Permanent Staffing Index shows that, on balance, practices intend to recruit additional staff. However, on average, staff levels are reported to be around 6% lower than 12 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 February 2025:
Workload Index: Analysis by Practice Size,
Region, and Sector.

In February, the outlook for **small practices** (1 - 10 staff) recovered to post the first positive balance since June 2024. At +3, the small practice Workload Index is up 8 points from last month's -5.

Twenty-eight per cent of small practices anticipate an increase in workloads, 25% expect a decrease, and 48% anticipate stability.

The outlook for **large (51+ staff) and medium-sized practices** (11 -50 staff) remains positive, with a combined Workload Index of +15. Thirty-six per cent expect workload growth, 21% anticipate contraction, and 43% expect steady workloads.

The overall outlook has improved in the **regions**, with most areas anticipating growing workloads.

London's outlook has again improved, with a workload Index of +14, up from last month's +10 figure: the highest level of optimism in the capital since mid-2022.

The outlook for Wales and the West has become positive. February sees a +3 regional Workload Index figure, following last month's -12.

The North of England, with a +6 Index figure, continues to expect growing workloads but has seen a slight softening of confidence compared with last month's +8 figure.

The South of England and the Midlands & East Anglia remain pessimistic about future work, although both see an improved outlook. The South of England posted a -1 balance figure in February, up from -10 in January, and the Midlands & East Anglia posted a -2 figure, up from -10.

The **sectoral outlook** has improved, with two of the four monitored sectors anticipating growing workloads.

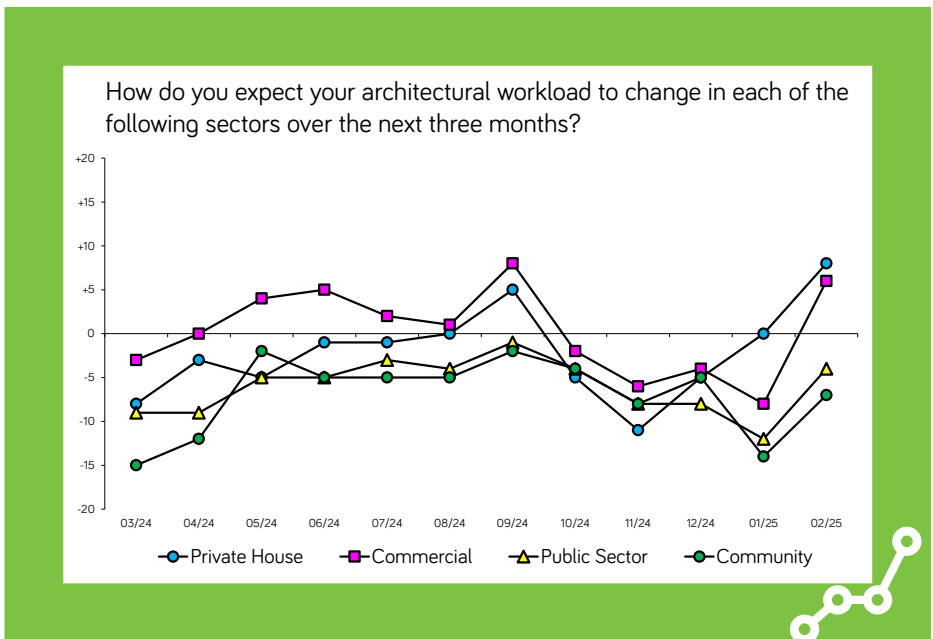
The **private housing** sector recovered further this month; the overall outlook is positive. Following a zero Index figure last month, the housing index now stands at +8.

The outlook for the **commercial sector** sees an uptick in sentiment. The sector's Workload Index stands at +6 this month, up 14 points on last month's -8 figure.

Though still negative, workload expectations for the **community sector** have improved, with a balance figure of -7 in February, compared with -14 in January.

The outlook for the **public sector** remains pessimistic but has also improved. February sees a sector Workload Index of -4.

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



RIBA Future Trends February 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	13
Stay the same	91
Increase	17
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.)

* Values do not total 100 due to rounding.

After a dip in January, the RIBA Future Trends Permanent Staffing Index has returned to positive territory, returning a +4 balance this month, up eight points.

Seventeen per cent of practices anticipate an increase in permanent staff in the coming three months, 13% expect a reduction, and 71% expect no change. On balance, practices are more likely to expect an increase in permanent staffing levels than a decrease.

The staffing outlook for the capital is the most positive, at +8. The only region continuing to expect a contraction in staff levels is Wales & The West, with a -2 Staffing Index figure.

Practices of all sizes anticipate growing staff levels. Large and medium-sized practices are more positive about future recruitment than small practices (those with 10 or fewer staff).

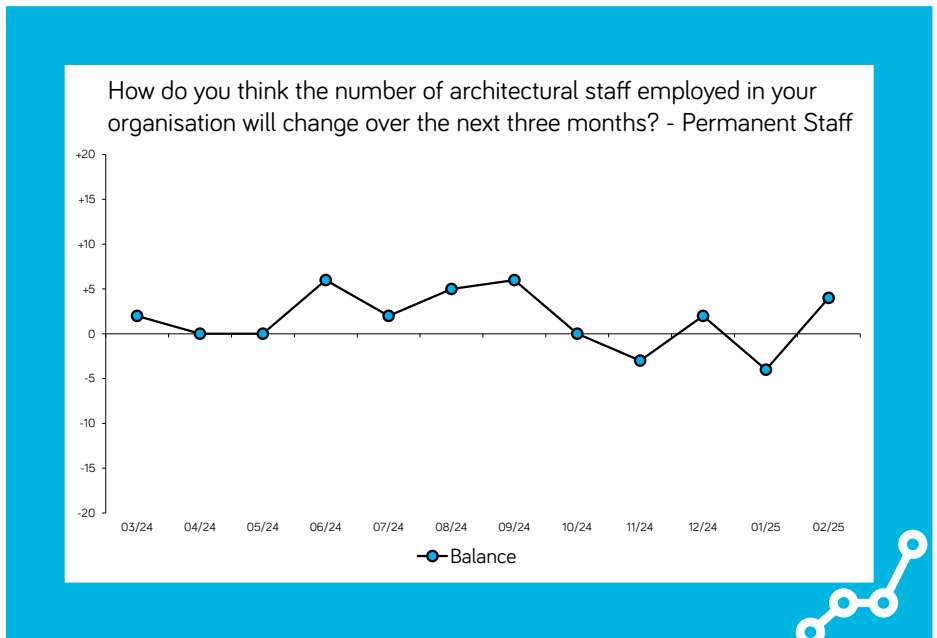
The RIBA Temporary Staffing Index has risen sharply this month, returning a balance of +7, compared with -6 in January.

The strongest anticipated demand for temporary staff is among small practices and those in the North of England.

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 February 2025: Commentary.

After three months of the profession anticipating declining workloads, this month sees a welcome return of near-term optimism. Positive outlooks in the housing and commercial sectors have spurred overall confidence, with the Housing Sector reaching its highest Index figure since mid-2022.

This improved outlook is seen nationwide, with only one region reporting a negative outlook. London stands out as the most positive region.

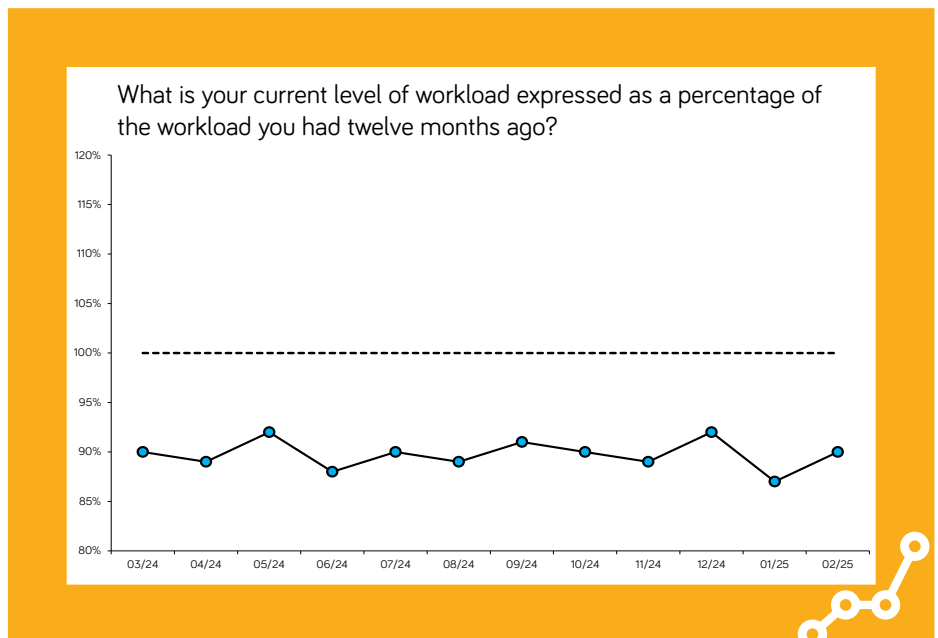
However, despite this increased optimism, significant risks to future growth remain. These include heightened geopolitical uncertainty and growing threats to global supply chains due to protectionist trade policies.

Commentary received from practices in February gives a mixed picture.

Many describe a challenging market, hindered by client hesitancy, raised interest rates, planning delays, strong fee competition, an increased regulatory burden, and upcoming increases in stamp duty and employer NICs.

In such a market, some practices report difficulty gaining sufficient work of sufficient value to maintain current staffing levels and ensure practice viability.

Other practices, however, give a more optimistic assessment, with reports of more enquiries, full order books for the year, new growth sectors, and an overall strong start to the year.



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 263 practices took part in the Survey in February 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.