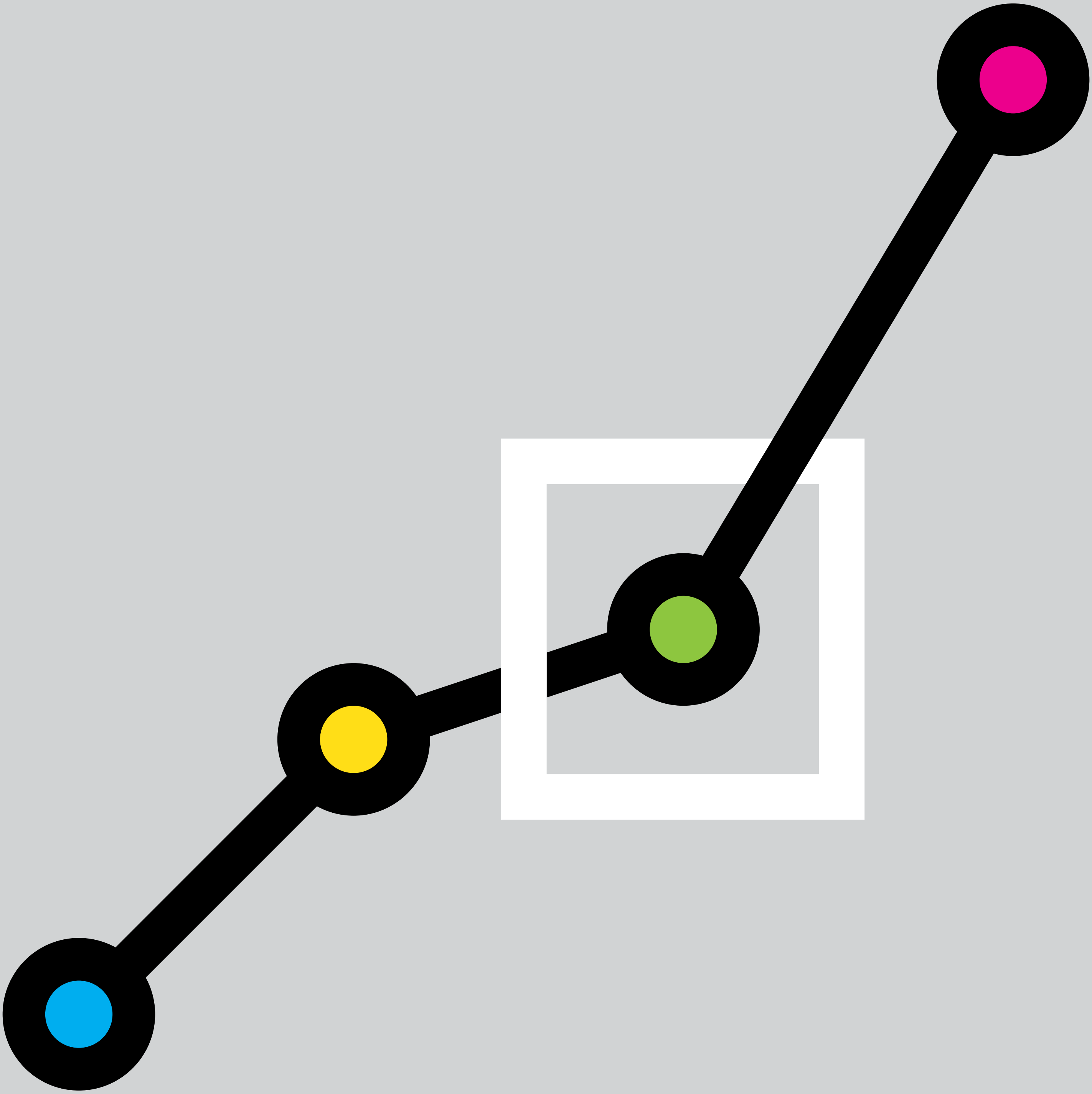
Future Trends Survey:

June 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 June 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	17
Stay the same	58
Increase	25
TOTAL	100
Balance	**+8**

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

In June, architects remain positive about their workloads over the next three months, although optimism has fallen back a little compared to last month. This is due to fewer practices expecting workloads to increase, rather than to more expecting workloads to contract.

The June RIBA Future Workload Index returned a +8 balance figure, a decrease of three balance points compared with May. A positive balance indicates that, overall, practices expect workloads to increase during the next three months.

Twenty-five per cent of practices anticipate an increase in workloads, while 17% expect a decline. Fifty-eight per cent expect workloads to remain stable.

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

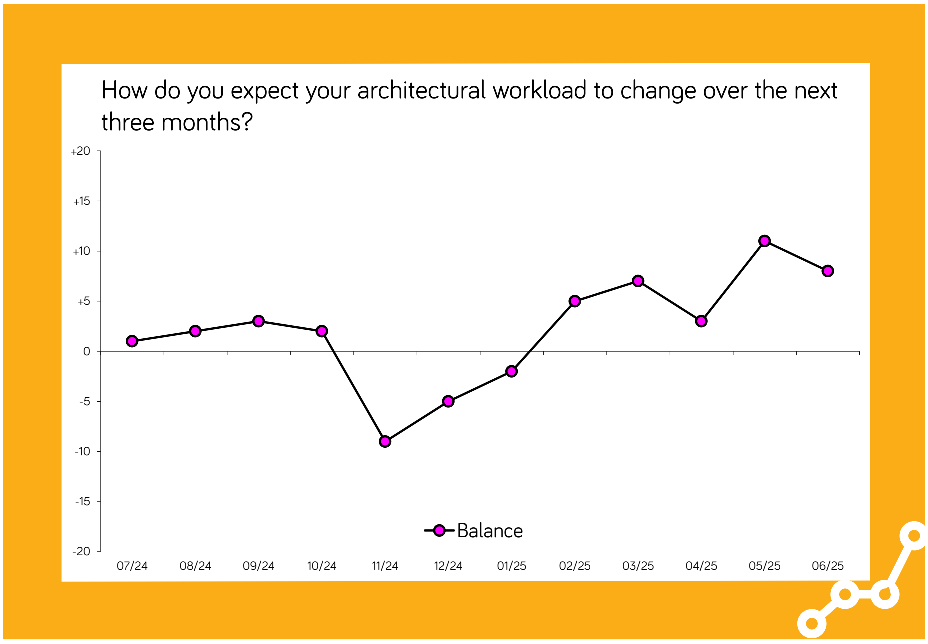
Although optimism has moderated this month, all regions continue to expect workloads to grow, and all sectors are positive about future work.

Despite the profession having had a positive outlook for future work for five months, 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 has become more positive this month, although this contrasts with a fall in the Temporary Staffing Index.

While practices intend to recruit permanent staff over the next three months, average staff levels remain 5% lower than a year ago.

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

In June, the outlook for **small practices** (those with 1 to 10 staff) remained positive but fell back slightly. The small practice Workload Index fell by two balance points from +4 in May to +2 in June.

Twenty-one per cent of small practices anticipate an increase in workloads in the next three months, 20% expect a decrease, and 59% anticipate no change.

The outlook for **large** (51+ staff) and **medium-sized practices** (11 -50 staff) also dipped slightly, but remains strongly positive, with a combined Workload Index of +24 in June, down from +28 in May. Thirty-five per cent expect workload growth, 10% anticipate contraction, and 55% expect no change.

The **regional** outlook remains positive in all areas, although optimism has softened in several regions.

London's Workload Index, having risen to +17 in May, fell by nine points in June to post a +8 balance in June.

The outlook also softened in the Midlands and East Anglia (falling from +18 in May to +5 in June) and the North of England (from +18 to +5).

Not all regions saw a declining outlook. The Workload Index for Wales and the West rose from +3 in May to reach +17 in June. The South of England also saw an improved outlook with a +3 Index figure this month, up from +1 in May.

After May's marked uptick in optimism across the sectors, June sees the **sectoral outlook** moderating overall, but with all sectors retaining a positive outlook for the next three months.

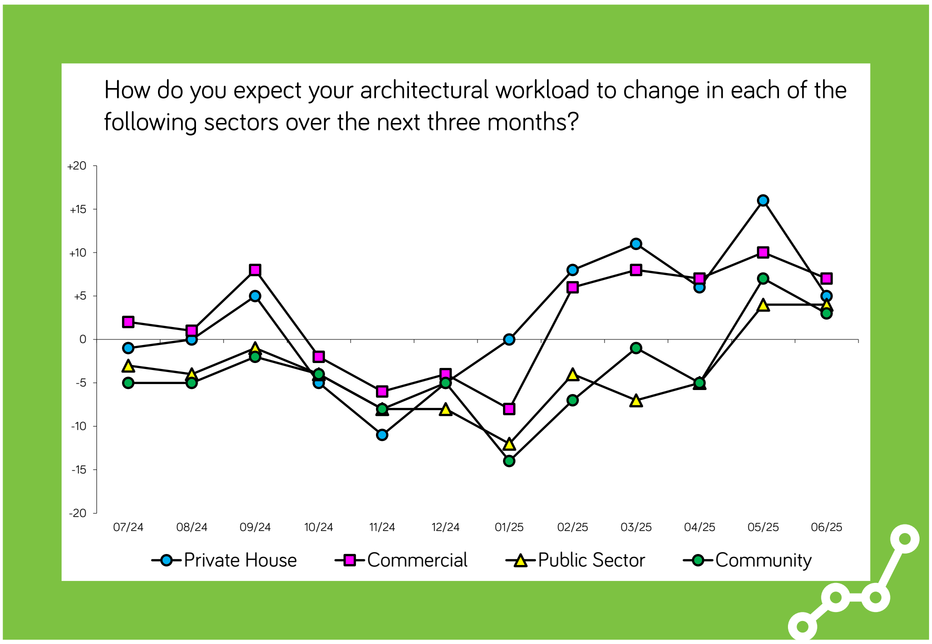
The **private housing** sector saw the sharpest reduction in optimism this month, with a +5 Workload Index in June, down from +16 in May.

The outlook for the **commercial sector** posted a +7 figure, down three points compared with last month.

Workload expectations for the **community sector** have also softened with a balance figure of +3 in June, compared with +7 in May.

The outlook for the **public sector** remains steady and in positive territory, with a sector Index of +4 in June, the same as last month.

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



RIBA Future Trends June 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	5
Stay the same	81
Increase	14
TOTAL	100
Balance	+9

(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 +9 this month, having risen by four index points.

On balance, practices continue to expect permanent staffing levels to increase over the next three months. Fourteen per cent of practices anticipate an increase in permanent staff over the next three months, while 5% expect a reduction and 81% expect no change.

This month's Staffing Index rise reflects the decreasing proportion of practices who anticipate falling staff levels, rather than an increase in those anticipating recruitment.

The staffing outlook is positive in all regions.

The South of England is the most positive region for recruitment this month, with a Permanent Staffing Index of +18.

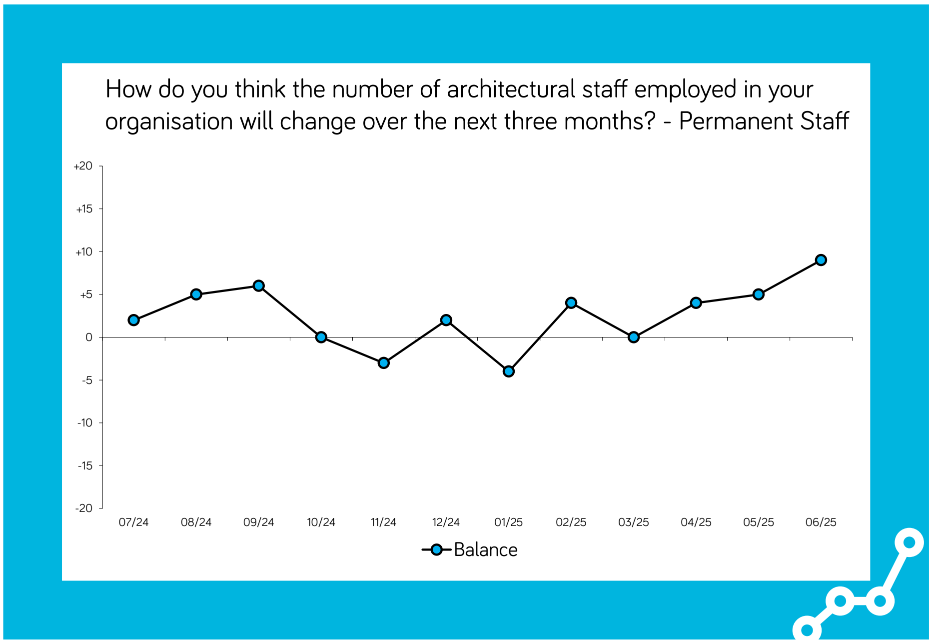
Looking at the other regions, London has returned a Staffing Index of +11, the Midlands & East Anglia +10, Wales & the West +9, and the North of England +14.

Small practices (1–10 staff) now anticipate growing permanent staff numbers, with a +7 Staffing Index. The staffing outlook among Large and Medium-sized practices (11+ staff) remains positive with a combined Index of +18.

The RIBA **Temporary Staffing Index** is also positive this month, though falling back from May's +17 figure to +2.

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 June 2025: Commentary.

June sees the profession remain optimistic about future workloads, but optimism is softening somewhat compared with the uptick in outlook seen in May. Current workloads remain below what they were twelve months ago.

Nevertheless, all practice sizes, regions and sectors remain optimistic about future work.

The ongoing improvement in outlook for permanent staff recruitment suggests a benign longer-term outlook, even in a challenging economic background.

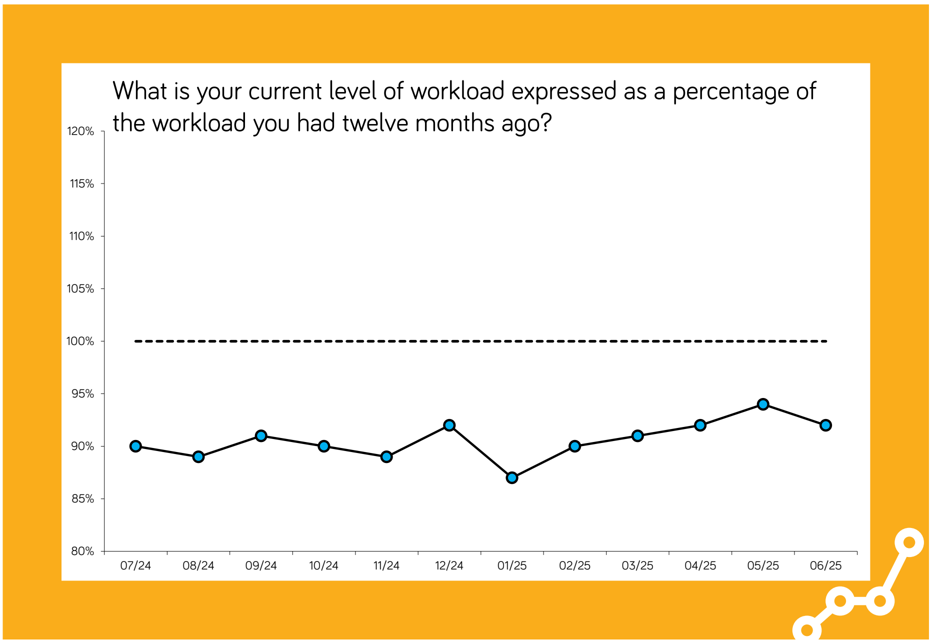
This month's commentary gives a mixed picture.

Some practices describe an improving market, with increased enquiries and commissions, particularly for smaller projects, high-end residential, office fit-outs, and within the education sector.

A number of practices note that recruiting qualified staff is becoming increasingly challenging, especially where specialist skills, such as Passivhaus design, are required.

Other practices continue to describe a challenging market with concerns about the strength of the economy. Upward pressures on business and project costs are reported to continue. Practices express concern that increased regulatory requirements are increasing project costs, and delaying project progress. Low fees remain a significant concern for many.

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 255 practices took part in the Survey in June 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.