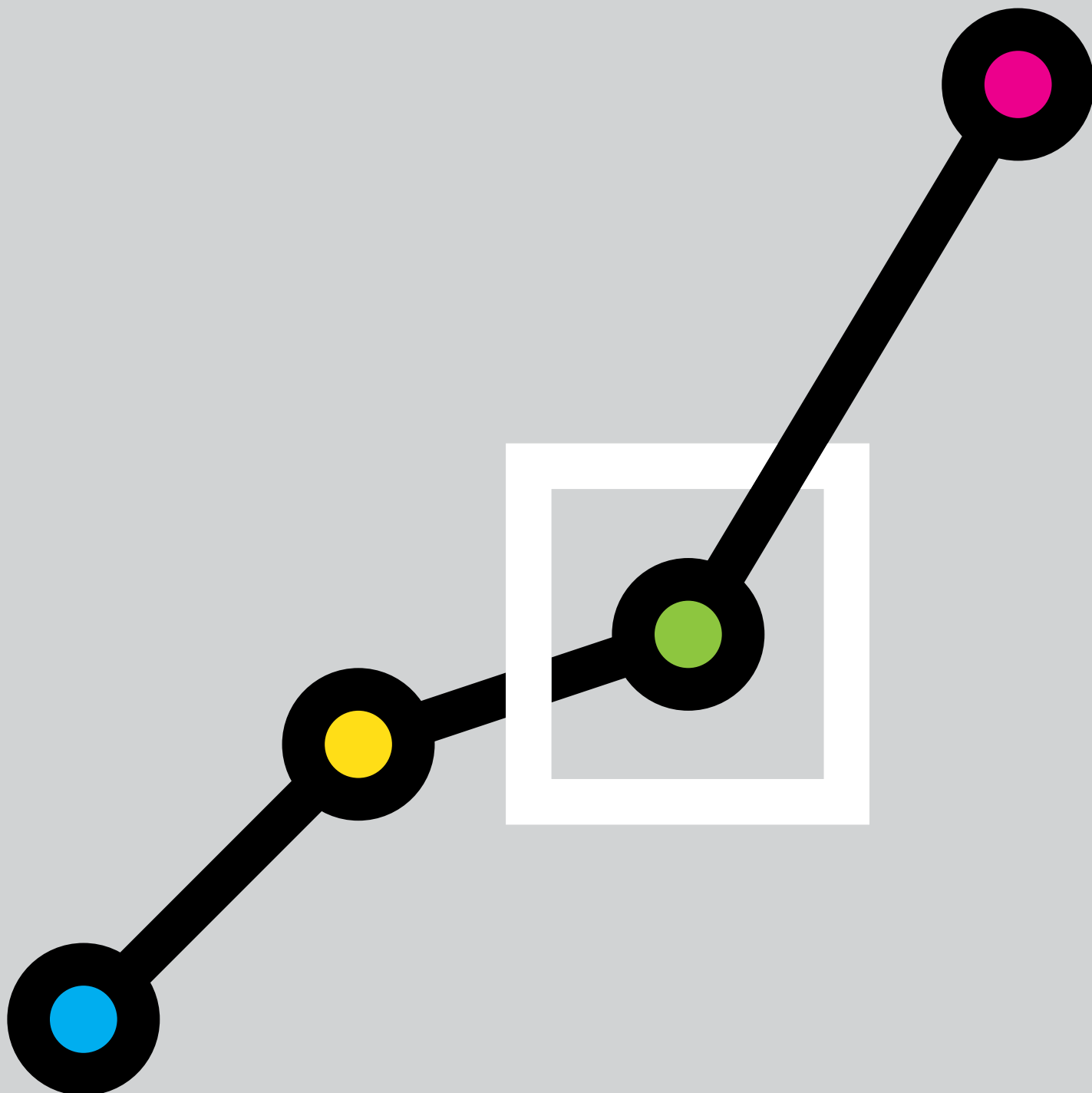


Future Trends Survey:

March 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 March 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 | 21 |
| Stay the same | 52 |
| Increase | 27 |
| TOTAL | 100 |
| Balance | +7* |

(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.

March saw the profession's outlook for future work become increasingly positive.

March's RIBA Workload Index rose by two balance points to +7, up from February's figure of +5.

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

Twenty-seven per cent of architects' practices anticipate an increase in workloads over the next three months, while 21% expect a decline. Fifty-two per cent expect workloads to remain stable.

All regions now expect workloads to grow.

The outlook for three of the four monitored work sectors has improved, with increasing workloads expected in the Residential and Commercial sectors.

However, current workloads remain lower than they were a year ago. The average practice workload has decreased by 9% over the past twelve months.

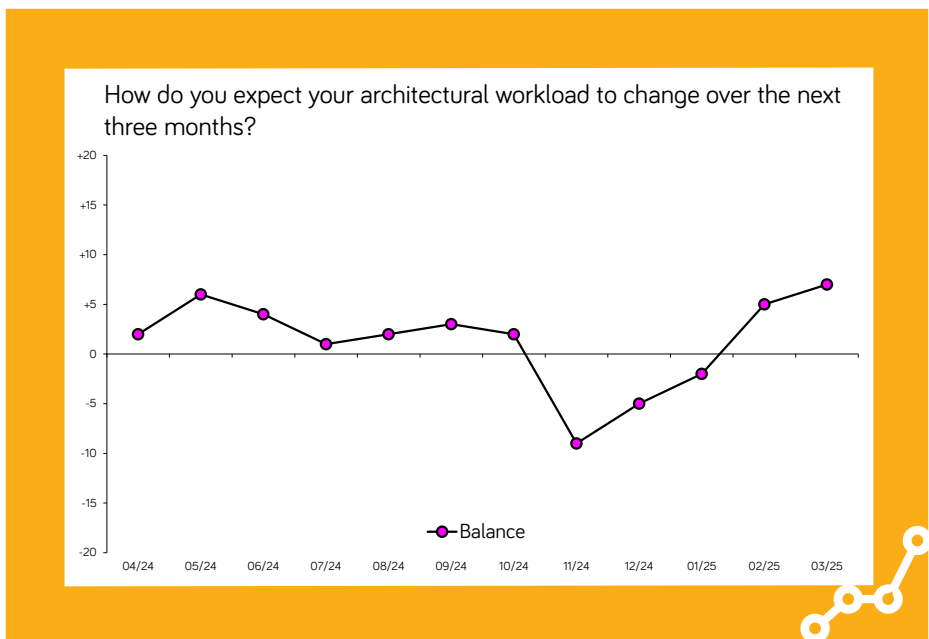
At Q, the RIBA Permanent Staffing Index shows that practices are cautious about additional recruitment. Practices report staff levels to be around 3% lower than they were twelve months ago.

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

March's data precedes the global market turmoil caused by the introduction of trade tariffs by the US President.

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

In February, the outlook for **small practices** (1 - 10 staff) further improved, with a +6 Workload Index, up from February's figure of +3.

Twenty-nine per cent of small practices anticipate an increase in workloads, 23% 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 +9, although this is slightly lower than last month. Twenty-three per cent expect workload growth, 14% anticipate contraction, and 63% expect steady workloads.

The overall outlook has improved in most **regions**, with workloads expected to grow in all areas.

While still firmly positive, the outlook for the capital has slipped back slightly. London's Workload Index stands at +8 in March, down from +14 in February. It is the only region where confidence has fallen.

The North of England is the most positive region, recording a +12 Index figure, up from +6 in February. Wales and the West also show an increasingly positive outlook, with the Index figure rising five points to reach +8 in March.

The South of England, and the Midlands & East Anglia have returned to a positive outlook this month. The South of England has posted a +1 workload Index in March, up from -1 in February, while the Midlands & East Anglia has posted a +5 figure, up from -2.

The **sectoral outlook** has broadly improved, with two of the four monitored sectors expecting rising workloads.

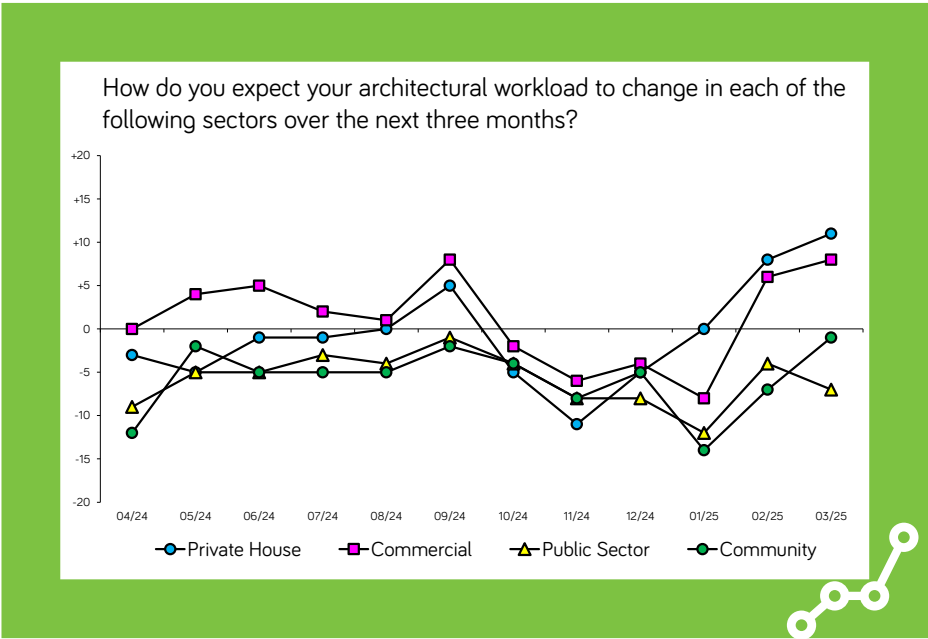
The **private housing** sector recovered further this month, with a +11 balance figure in March, up from +8. This is the highest Workload Index for the sector since May 2022.

The outlook for the **commercial sector** also sees further improvement. The sector's Workload Index stands at +8 this month, up 2 points on last month's +6 figure.

Though still negative, workload expectations for the **community sector** have further improved, with a balance figure of -1 in March, compared with -7 in February

The outlook for the **public sector** has fallen back this month, with a sector Workload Index of -7 in March, compared with -4 in February.

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



RIBA Future Trends March 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 | 73 |
| Increase | 13 |
| TOTAL | 100 |
| Balance | +0* |

(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.

The RIBA Future Trends Permanent Staffing Index has fallen to a zero balance this month, falling four index points.

On balance, practices expect permanent staffing levels to remain steady, with as many expecting a decrease as an increase. Thirteen per cent of practices anticipate an increase in permanent staff over the next three months, while an equal proportion (13%) expect a reduction. The majority (73%) expect no change.

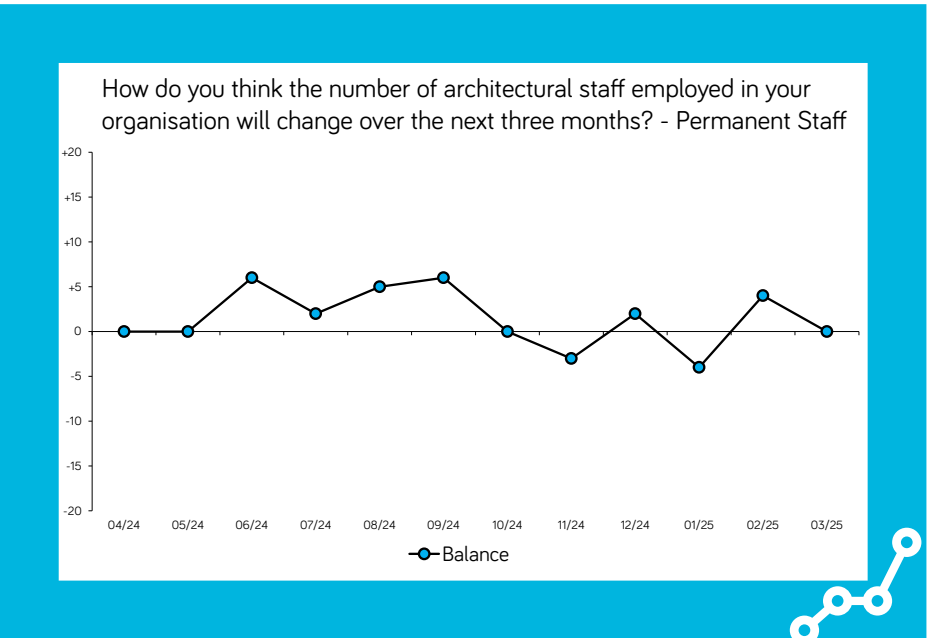
The staffing outlook is positive in London (+2), the Midlands & East Anglia, (+8) and Wales & The West (+6). It is negative, however, in the North of England (-4) and the South of England (-9).

The RIBA Temporary Staffing Index remains positive this month, with a balance figure of +6, one point lower than last month.

That the Temporary Staffing Index is higher than the Permanent Staffing Index suggests uncertainty about long-term workloads is making practices less willing to make permanent appointments, and instead are seeking to employ temporary staff.

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 March 2025:
Commentary.

March's data is, on the face of it, encouraging. Practices in all regions are optimistic about future workloads. The sectoral outlook is improving, with increasing optimism for the Housing and Commercial sectors, and reducing pessimism in the Community sector.

The announced increase in government capital spending, the expectation of increased housing construction, and the intended reform of the planning system may improve future workloads.

The +7 Workload Index of March 2025 compares well with the zero figure of March 2024.

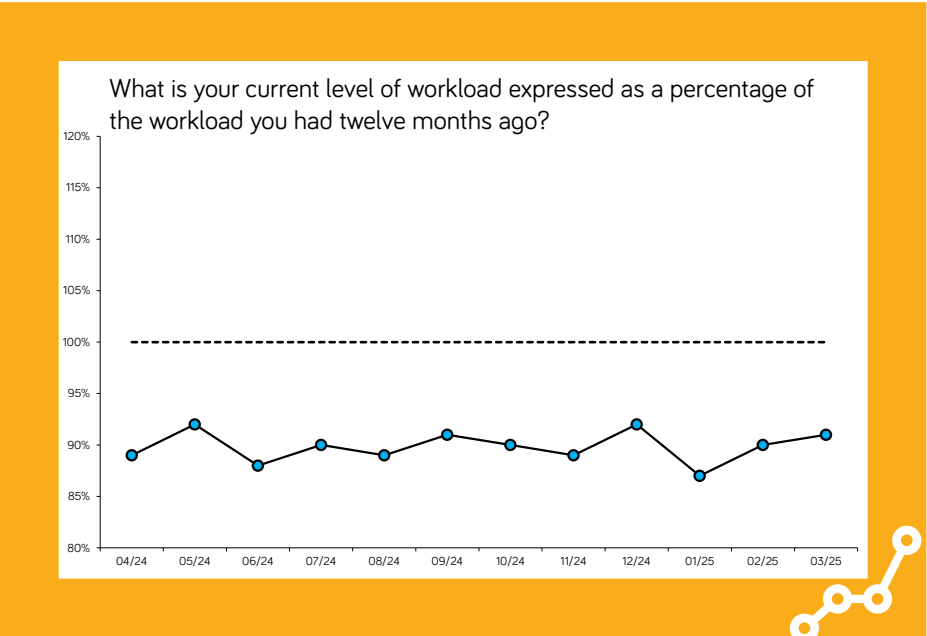
After a challenging 2024, it looks as if the first quarter of 2025 sees a corner turned, with an increasingly positive outlook for the coming three months.

However, global uncertainty and the market turmoil created by the introduction of trade tariffs cast a shadow over March's optimism. Heightened uncertainty is likely to reduce client willingness to commission new projects. The RIBA will continue to monitor developments closely.

Commentary received from practices in March gives a mixed picture.

Some practices describe a flat or suppressed market, with the ongoing challenges of planning delays and fee pressure. Practices have also highlighted the increased costs they, contractors, and clients will face in April.

Other practices offer a more upbeat assessment of the current market, describing areas of growth in the residential market, increased enquiries, and rising hope for 2025.



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 294 practices took part in the Survey in March 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.