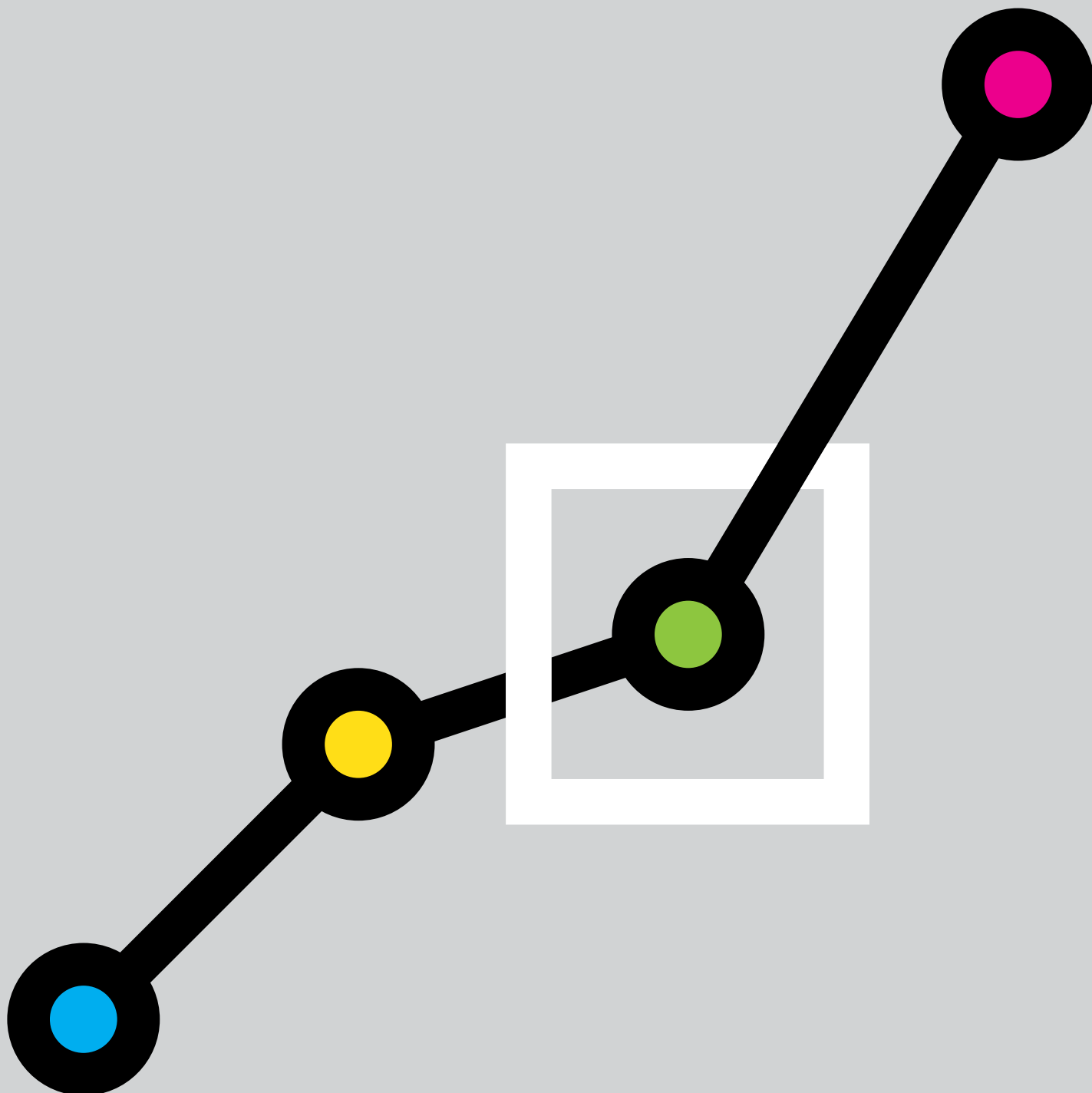


Future Trends Survey:

May 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 May 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	19
Stay the same	51
Increase	30
TOTAL	100
Balance	+11

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

The profession's outlook for future work is positive and improving this month. The RIBA Workload Index is at its highest level since mid-2022.

The May RIBA Future Workload Index returned a +11 balance figure, an increase of eight points compared to April. A positive balance indicates that, overall, practices expect workloads to increase during the next three months.

Thirty per cent of practices anticipate an increase in workloads, while 19% expect a decline. Fifty-one per cent expect workloads to remain stable.

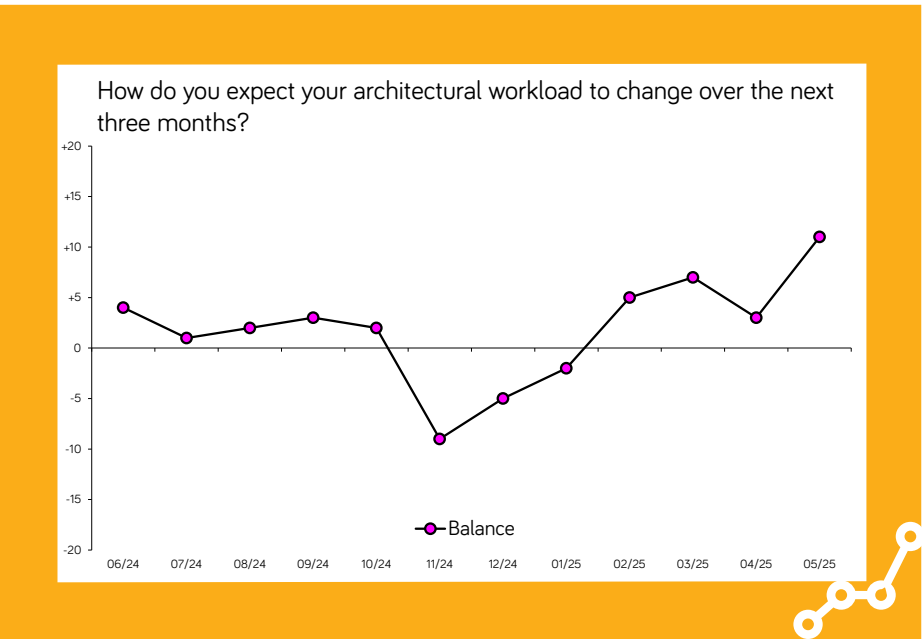
All regions expect workloads to grow over the next three months. All sectors are positive about future work, with the Private Housing sector the most optimistic.

However, current workloads remain lower than a year ago. The average practice workload has decreased by 6% over the past twelve months.

The RIBA Permanent Staffing Index shows that, on balance, practices intend to increase the number of both permanent and temporary staff over the coming three months. Nevertheless, average practice staff levels are reported to be around 4% lower than twelve 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 May 2025:
Workload Index: Analysis by Practice Size,
Region, and Sector.

In May, the outlook for **small practices** (those with 1 to 10 staff) improved, with an expectation of growing workloads. The small practice workload index rose by six balance points from -2 in April to +4 in May.

Twenty-eight per cent of small practices anticipate workloads increasing in the next three months, 24% expect a decrease, and 48% anticipate no change.

The outlook for **large** (51+ staff) and **medium-sized practices** (11 -50 staff) also improved and is increasingly positive. Their combined Workload Index rose twelve balance points to +28 in May, up from +16 in April. Thirty-five per cent expect workload growth, 7% anticipate contraction, and 59% expect no change.

The **regional** outlook reflects the increased optimism of the profession, as all regions show a positive outlook, and all but one region see their outlook improve.

London's Workload Index rose to +17 in May, up from +12 in April. Improved and positive outlooks were also seen in the North of England (from +1 in April to +18 in May), the Midlands and East Anglia (from +10 to +18), and the South of England (from -14 to +1).

The outlook for Wales and the West was also positive but fell back slightly this month, from +5 in April to +3 in May.

The **sectoral** outlook has strengthened this month, with growing workloads expected in each of the four monitored sectors for the first time since early 2022.

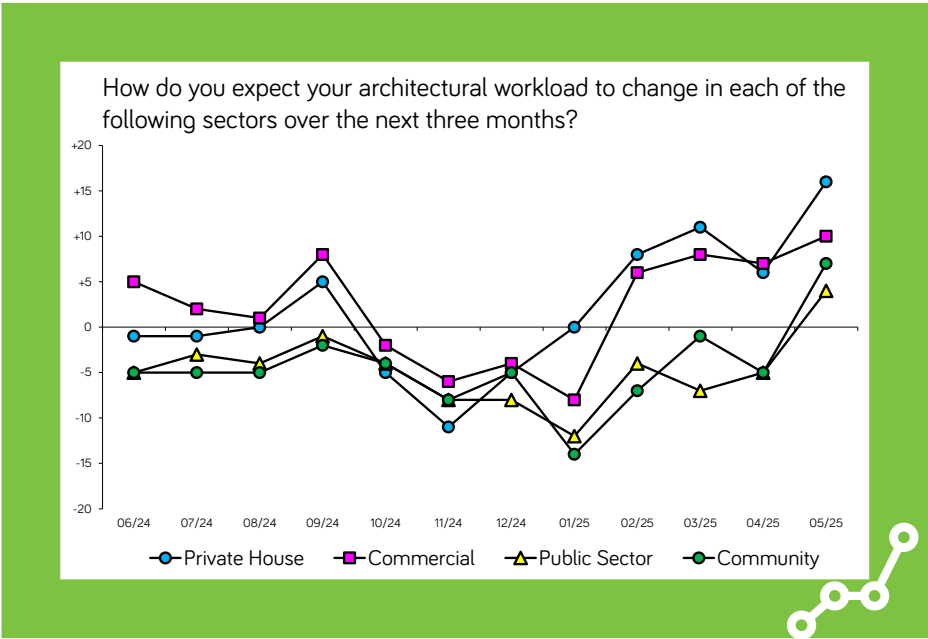
The **private housing** sector is increasingly positive, with a Workload Index of +16, a ten point increase on April's figure.

The outlook for the **commercial** sector also improved, with the sector posting a +10 figure, up three points compared with last month.

The outlook for the **public sector** has returned to positive territory after more than three years. This month sees sentiment about future work improving, up nine balance points with a +4 workload index figure.

Workload expectations for the **community** sector have also returned to optimism, with a balance figure of +7 in May, compared with -5 in April.

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



RIBA Future Trends May 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	10
Stay the same	75
Increase	15
TOTAL	100
Balance	+5

(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 +5 this month, having risen by one index point.

On balance practices expect permanent staffing levels to increase over the next three months. Fifteen per cent of practices anticipate an increase in permanent staff over the next three months, while 10% expect a reduction and 75% expect no change.

The staffing outlook is positive in all but one region.

The regions anticipating permanent staff numbers to increase are London (Staffing Index +10), the Midlands & East Anglia (+8), Wales & The West (+6), and the North of England (+2).

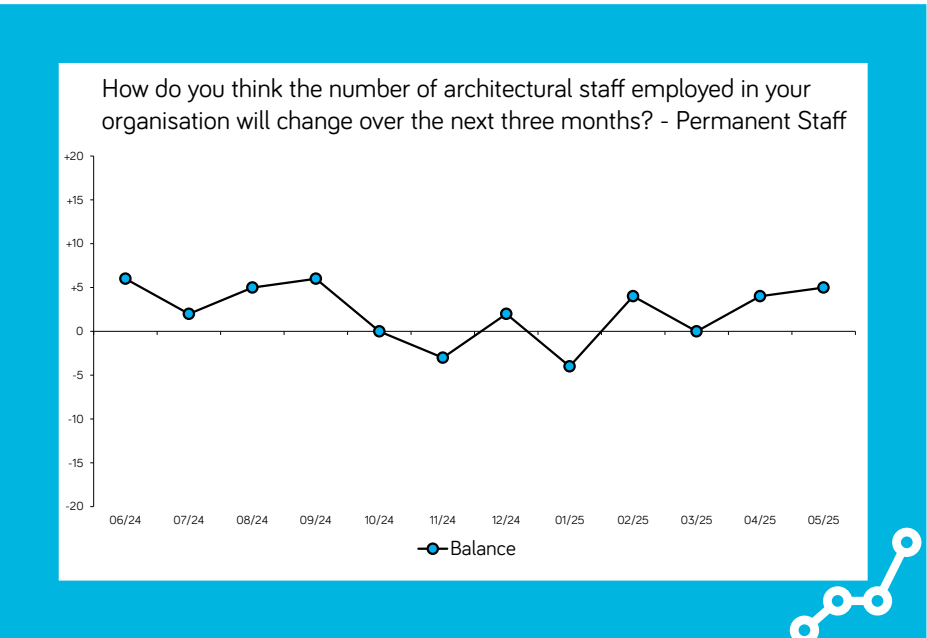
The South of England remains the only region where practices expect staffing levels to decline, with a Staffing Index figure of -5.

Small practices (1–10 staff) anticipate falling permanent staff numbers, with a -2 Staffing Index. The staffing outlook among Large and Medium practices (11+ staff) is more buoyant, with a combined Index of +23, with 37% of practices anticipating increasing permanent staffing levels and 14% anticipate falling staff numbers.

The RIBA Temporary Staffing Index rebounded from a -1 balance figure in April to a +7 figure in May.

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 May 2025:
Commentary.

With across-the-board optimism, May's Future Trends data shows the profession is more optimistic about future work than it has been for some time, with overall expectations for growth across all regions, sectors, and practice sizes. Anticipated increases in both permanent and temporary staffing levels underscore this optimism.

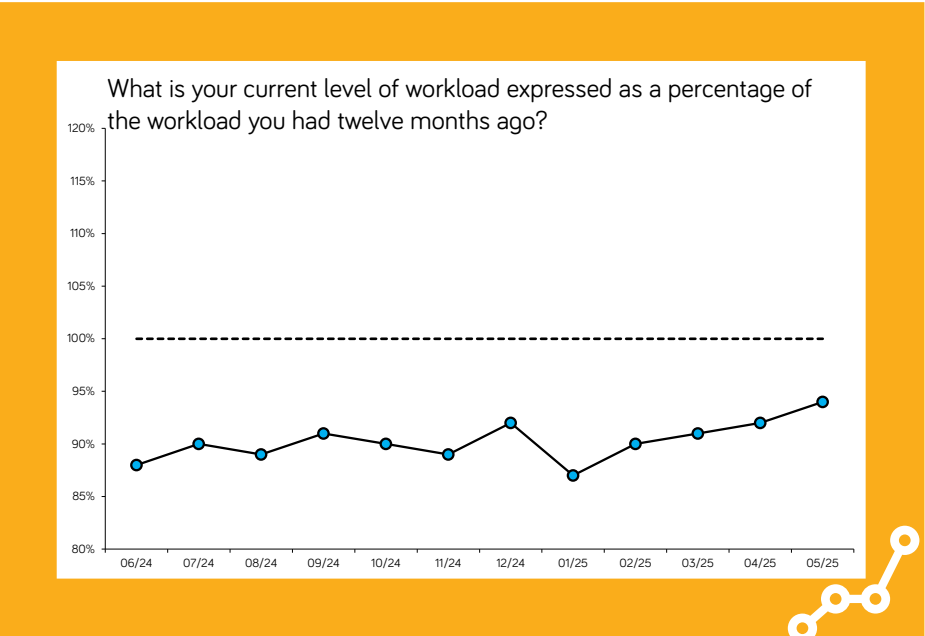
While the outlook for the commercial and residential sectors has again improved, the public sector stands out this month. With a balance figure of +4, this is the first time in over three years that the sector has been positive. This may reflect hopes for renewed investment in the public estate

While all practice sizes are positive, small practices, those with 10 or fewer employees, remain the most cautious, with almost a quarter expecting their workloads to decline.

Commentary this month describes areas where practices see workloads increasing, notably overseas work, the community sector, residential work with private developers, and small-scale domestic extensions.

Nevertheless, despite this overall optimism, the profession continues to face significant challenges. The increase in employer National Insurance has added to practice costs, and delays in the planning process continue to frustrate project progress. Practices are also contending with process complexity for higher-risk building, delays in client payment, fee undercutting, and continuing economic uncertainty.

The following graph plots 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 308 practices took part in the Survey in May 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.