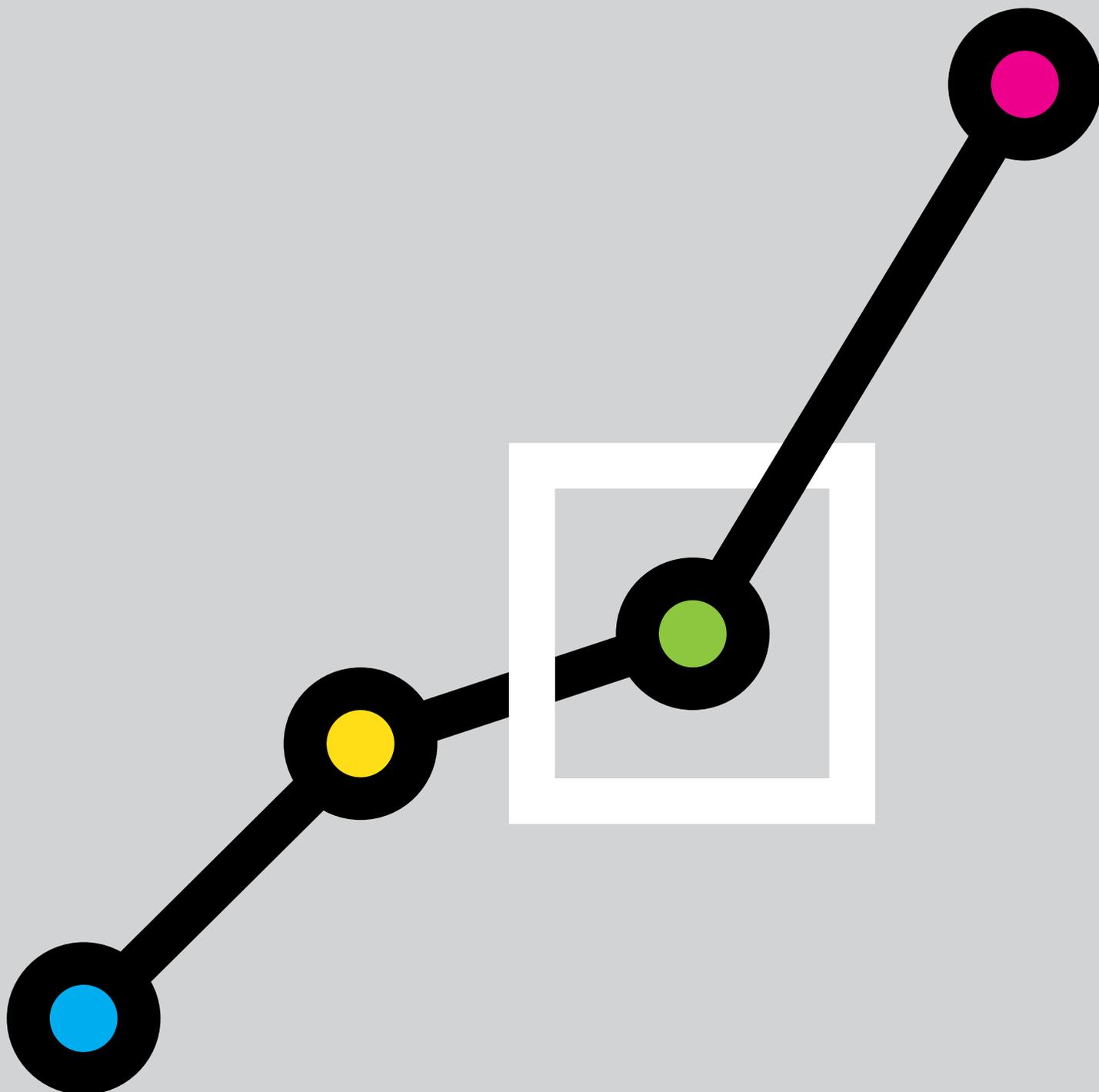


Future Trends Survey:

February 2022



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 on a quarterly basis 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

The following is a summary analysis of the results from the February 2022 survey returns.

RIBA Future Trends Workload Index (February 2022)

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	10
Stay the same	58
Increase	32
TOTAL	100
Balance	+23*

(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.

This month's report comes with an important caveat. The data used was gathered before the Russian invasion of Ukraine, so does not give insight into any secondary, economic effects the profession may feel. Early indications suggest that confidence may soften somewhat, but not fall dramatically. The RIBA has provided a wider response to the conflict [here](#).

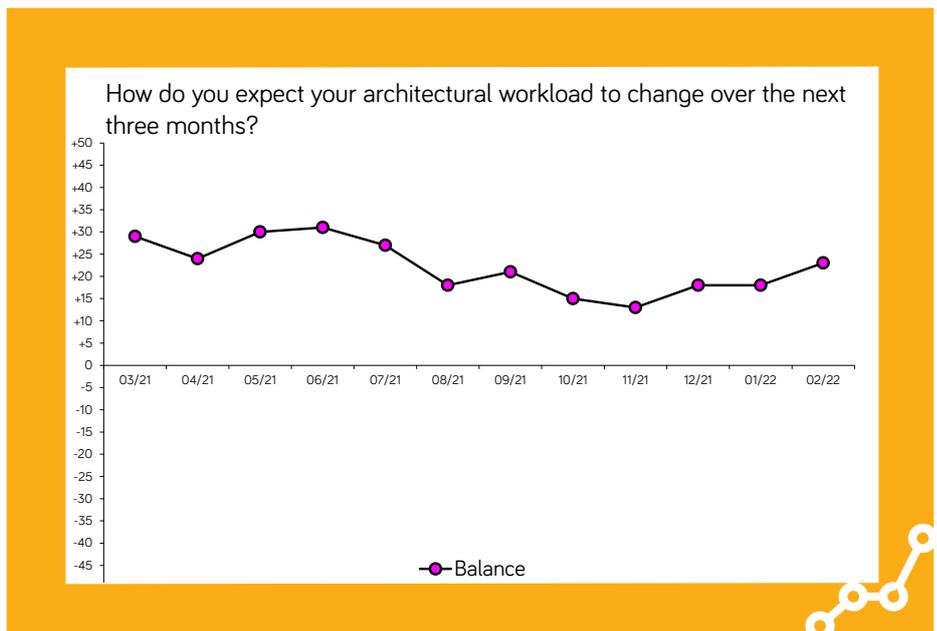
February 2022 has seen confidence grow further among architects, with the RIBA Future Workload index rising by 5 points, from +18 to +23.

Thirty-two per cent of practices expect workloads to grow in the coming three months, whilst fifty-eight per cent expect them to remain the same. Ten per cent of practices expect workloads to decrease.

On balance, all practice sizes remain confident about future workloads, as do all regions.

For the first time since the onset of the pandemic, all work sectors have returned a positive balance, with the Private Housing sector remaining the strongest.

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



Looking at the February 2022 RIBA Future Trends Workload Index in terms of practice size, region and sector:

In February, **small practices** (1 - 10 staff) posted a positive balance figure of +18, up 2 points from January's figure of +15.

Large and medium-sized practices (11 - 50 and 51+ staff) remain firmly positive about future workload, with a balance score of +48. A majority (56%) of larger practices now expect workloads to grow.

All UK regions anticipate increasing workloads over the next three months.

London has posted its highest balance score since the onset of the pandemic. At +40, London's score has risen by 24 points since last month and is the most optimistic region this month. Forty-eight per cent of practices in the capital expect workloads to increase in the coming months. Just 6% expect a workload reduction.

Despite a drop of 9 points this month, the North of England remains firmly positive, with a balance of +31. Wales & the West has also seen a fall (of 3 balance points), but it too remains comfortably in positive territory, with a balance score of +22.

At +14, the South of England remains optimistic, although this month has seen a 4 point fall on last month's figure of +18.

The Midlands & East Anglia has recovered from last month's dip into negative territory with a balance figure of +3, up 8 points from last month's figure of -5.

Turning to the work sectors, all sectors have grown in confidence this month, and, for the first time since February 2020, all sectors are positive about future workload.

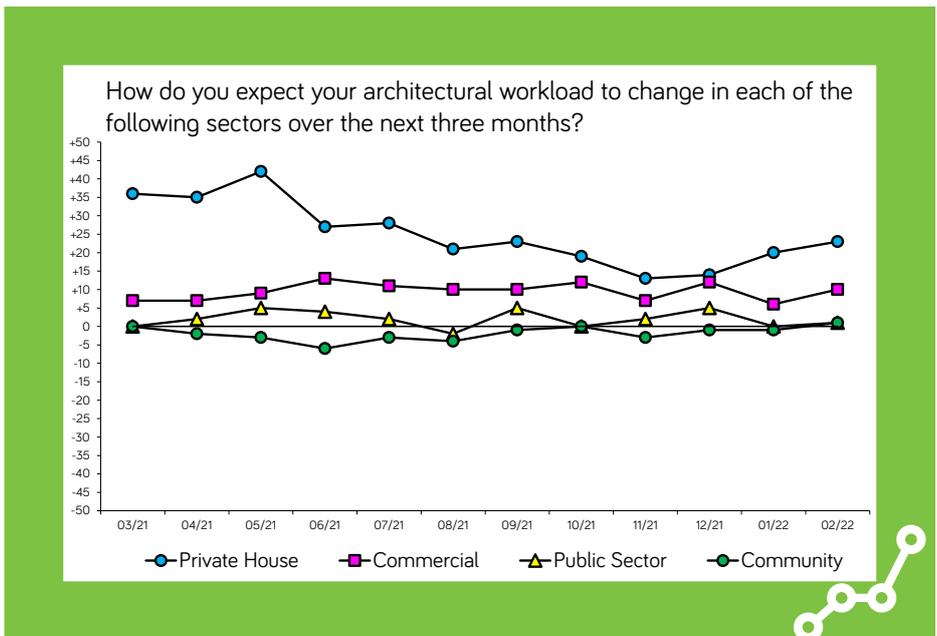
In February, the **private housing sector** posted a balance figure of +23, up 3 points from last month's figure of +20.

The **commercial sector** rose in February, with a balance figure of +10, a 4 point increase on last month.

The **public sector** edged into positive territory this month, with a balance figure of +1, up from zero last month.

The **community sector** ends a 23 month run of zero or negative balance figures with a balance score of +1. There is optimism in the sector by the slimmest of margins, but it is optimism nonetheless.

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



RIBA Future Trends Staffing Index
(February 2022)

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

Permanent Staff	%
Decrease	4
Stay the same	80
Increase	15
TOTAL	100
Balance	+11

(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.)

In February, the **RIBA Future Trends Permanent Staffing Index** reported a balance figure of +11, up 2 points from January.

Fifteen per cent of practices expect to employ more permanent staff over the coming three months and four per cent expect to employ fewer. Eighty per cent expect staffing levels to stay the same.

The RIBA Staffing Index suggests that many Medium and Large-size practices (11+ staff) will be actively recruiting, with a combined balance figure of +37. Forty-one per cent expect to employ more permanent staff in the next three months. Only 4% expect to employ fewer.

Overall, smaller practices (1 - 10 staff) are also positive about staffing levels, with an index figure of +6.

In February, the regional picture for permanent staffing remained firm; no region is pessimistic about future permanent staffing levels.

In line with growing optimism about future workloads among London practices, expectations for recruitment in the capital is strong. With an overall balance figure of +18 in the capital, 26% of practices expect to employ more permanent staff in the coming three months.

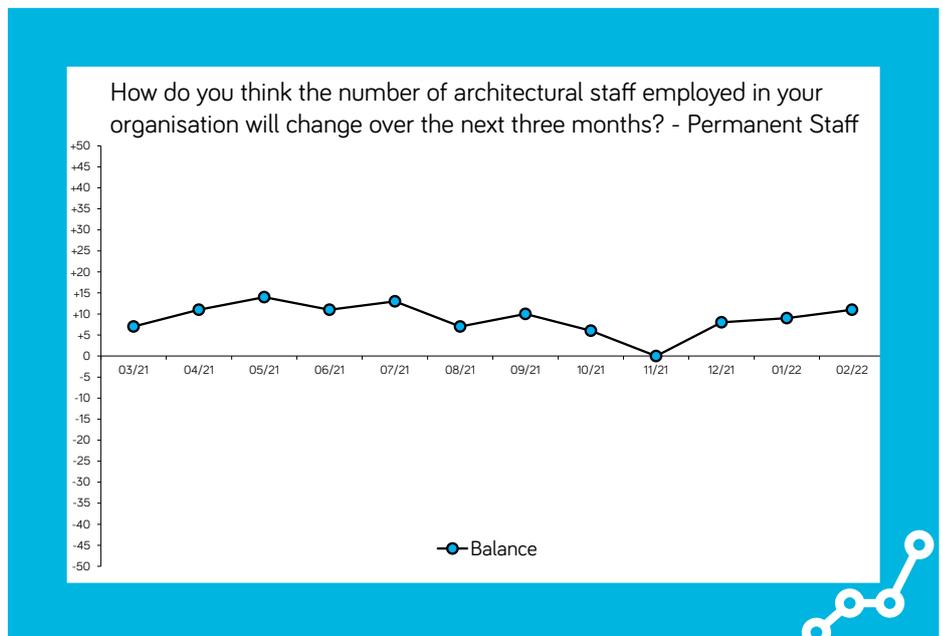
Other regions remain positive too; the South of England (+14), Wales & The West (+11), and the North of England (+9). There is a broad-based demand for staff. Only the Midlands & East Anglia remains cautious about recruitment, with a zero balance figure again this month.

The **Temporary Staffing Index** fell slightly to +6 in February, down one point from January's figure.

In February, **personal underemployment** stayed constant, with 11% reporting being personally underemployed in the last month. Capacity within practices remains tight.

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 2022)

This month has seen a rise in optimism across sectors and regions. The outlook for architects' workloads remains strong, with practices increasingly looking to recruit additional staff to meet growing demand.

London, the most significant region in terms of practice revenue, has shown a particularly strong uptick this month with growth in optimism about future workload, and growth in demand for permanent staff. This is particularly encouraging given the depth and length of the capital's covid-related workload fall.

In January we noted a welcome return to stability. That looks short-lived now. The economic effects of the invasion of Ukraine are yet to unfold but are likely to compound existing supply and inflation issues, at the very least.

Rapidly increasing energy prices once again demonstrate the need for the UK to implement an effective, well-funded and designer-led retrofit programme.

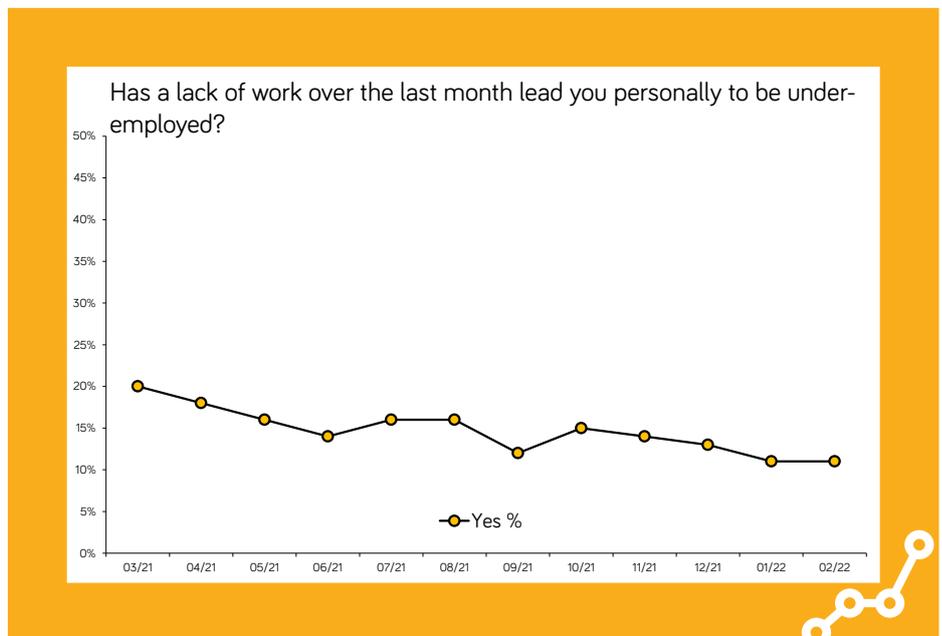
The commentary received from practices in February describes the challenges seen over the last few months remaining. Ongoing fee pressure, planning delays, and PII cost escalation continue. A constrained availability of construction products and on-site workers is adding to project costs. Continued and accelerated project cost inflation may mean intended projects are deferred or abandoned by clients.

Overall, however, the picture remains positive, with practices reporting strong demand, full order books, and a strong pipeline of work.

The following graph plots the levels of personal underemployment over time:

Notes

The percentage of respondents telling us that they were personally underemployed in the last month, due to a lack of work, is plotted here.



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 207 practices took part in the Survey in February 2022. 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.