RIBA

Memorandum

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. Practices are also 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 April 2011 Survey returns.

Future workload (April 2011)

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	23
Stay the same	46
Increase	31
TOTAL	100
Balance	+8

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

For the second consecutive month there has been no change in the overall RIBA Future Trends Workload Index, which remains at +8 in April 2011. It is of concern that the positive growth trend in this Index seen since December 2010 now appears to be somewhat running out of steam, with an increasing sense of uncertainty as to the future direction of travel for practice workloads.

Practices in London (balance figure +18) and the South of England (balance figure +42) continue to be significantly more confident about their work prospects than those in the rest of the United Kingdom.

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

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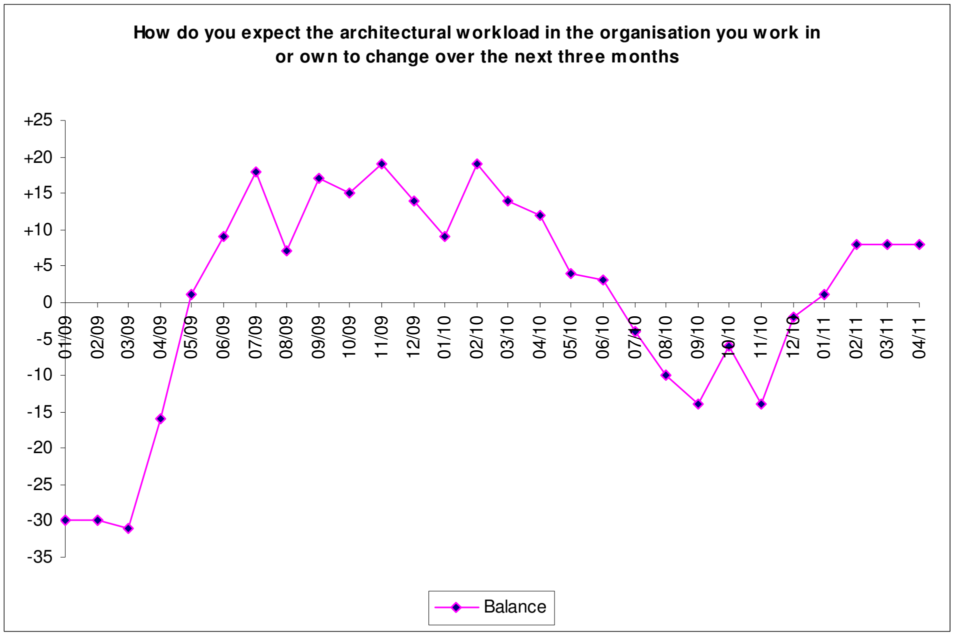

Both the private housing sector forecast (balance figure +9) and the commercial sector forecast (balance figure +1) remain in positive territory, but both have fallen back slightly this month in comparison with their levels in March 2011. However, there is some evidence that larger practices are beginning to see some upturn in commercial work prospects, especially in London and the South of England.

The community/third sector forecast (balance figure -7) and the public sector forecast (balance figure -22) continue to predict declining workloads.

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

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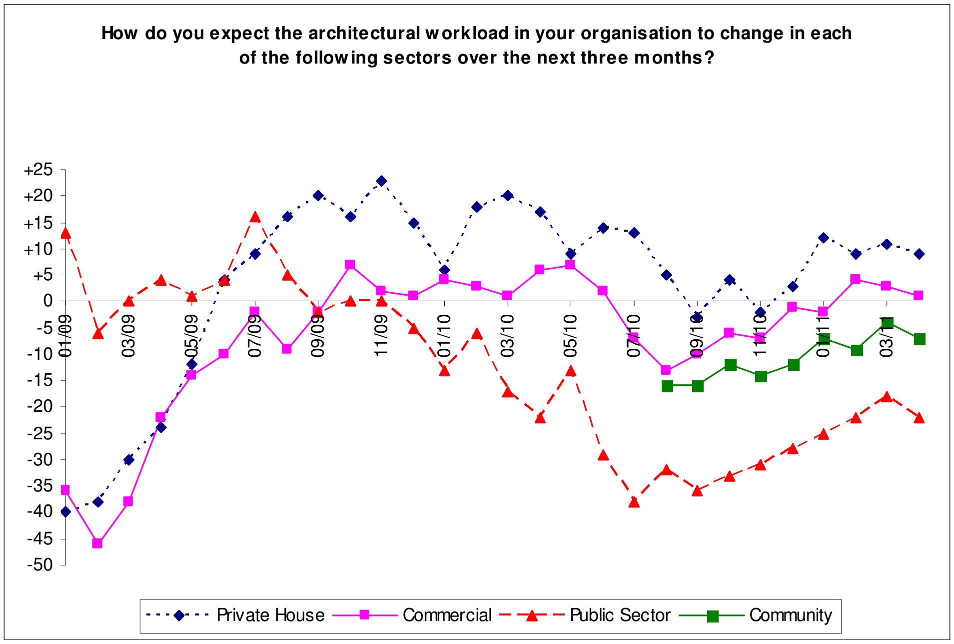

Future staffing levels (April 2011)

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

Permanent Staff	%
Decrease	16
Stay the same	77
Increase	7
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 Staffing Index for April 2011 is -9, falling from -4 in March 2011. Practices of all sizes throughout the UK seem to remain in general very cautious about increasing their permanent staffing levels. However, there is now some indication of greater confidence about taking on more temporary staff; when asked about hiring intentions for temporary staff our practices returned a balance figure of +7.

Approximately a quarter of our respondents continue to report that they have personally been under-employed in the last month.

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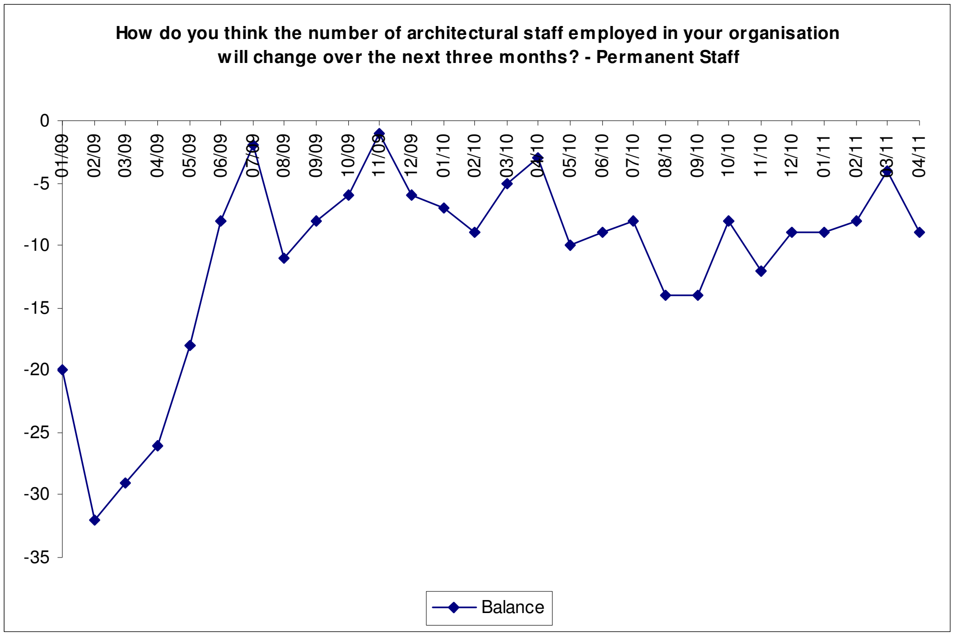
The following graph plots the RIBA Future Trends Staffing Index over time:



Each quarter we ask our practices about their current workload levels compared with twelve months previously. Work in progress has continued to decline throughout the period in which we have been undertaking the RIBA Future Trends survey.

Overall workload for the practices in our survey fell by 6% in the year between April 2010 and April 2011. During the same period permanent staffing levels fell by 4%.

The following graph illustrates year-on-year comparative workloads since January 2009:

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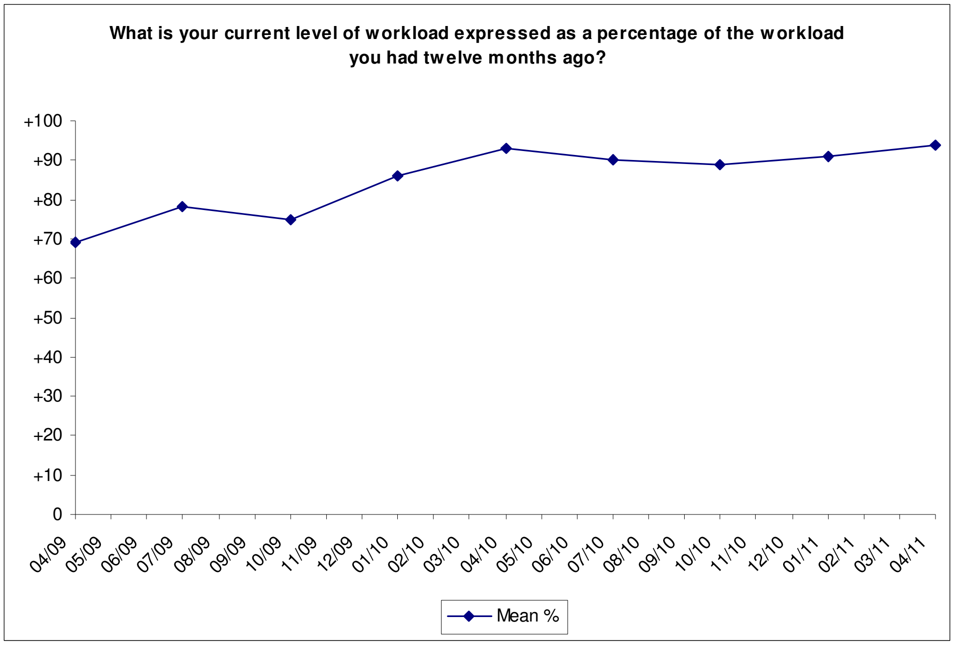

Anecdotal evidence received this month focuses on a number of familiar issues, including delays and uncertainties in the planning system, intense fee competition and a general consensus that the situation remains very unpredictable which affects confidence amongst both architects and their clients. Many respondents have noted the importance of practice reputation, whether based on their local profile or areas of sector expertise, as being of great importance in maintaining workloads.

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 223 practices took part in the Survey in April 2011. 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@inst.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.