
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 August 2011 Survey returns.

Future workload (August 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	52
Increase	25
TOTAL	100
Balance	+2

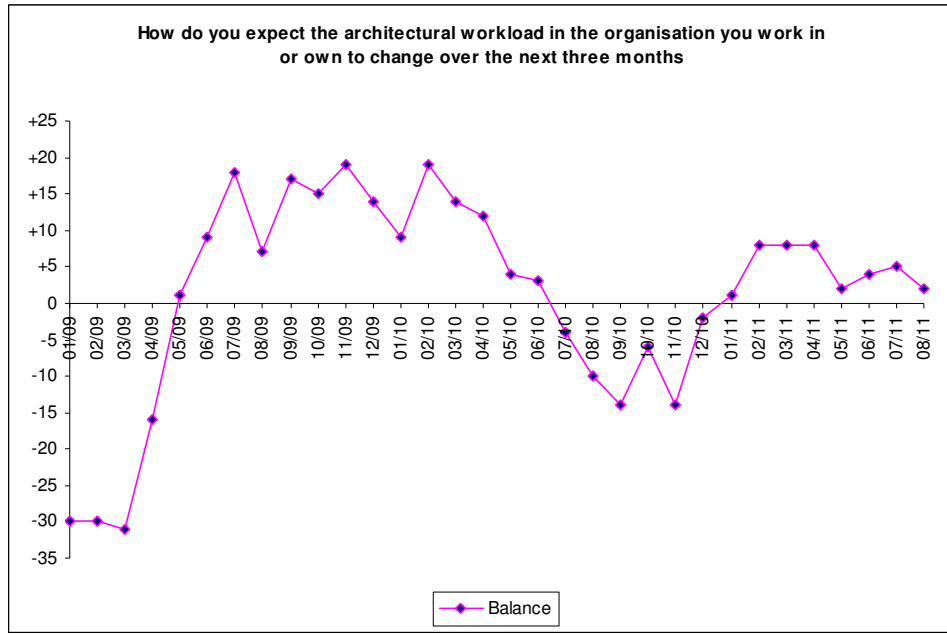
(The definition for the balance figure is the difference between those expecting more work and those expecting less.)

Although the RIBA Future Trends Workload Index for August 2011 just remains in positive territory at +2, this represents a fall from +5 in July 2011 and indicates an overall drop in confidence levels this month about future workloads for the UK architects' profession.

Practices based in London (balance figure +9) remain more optimistic about growth in workloads over the next quarter than those in the rest of the UK. Practices in Scotland (balance figure -13) and Northern Ireland (balance figure -25) are least confident about future levels of work.

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

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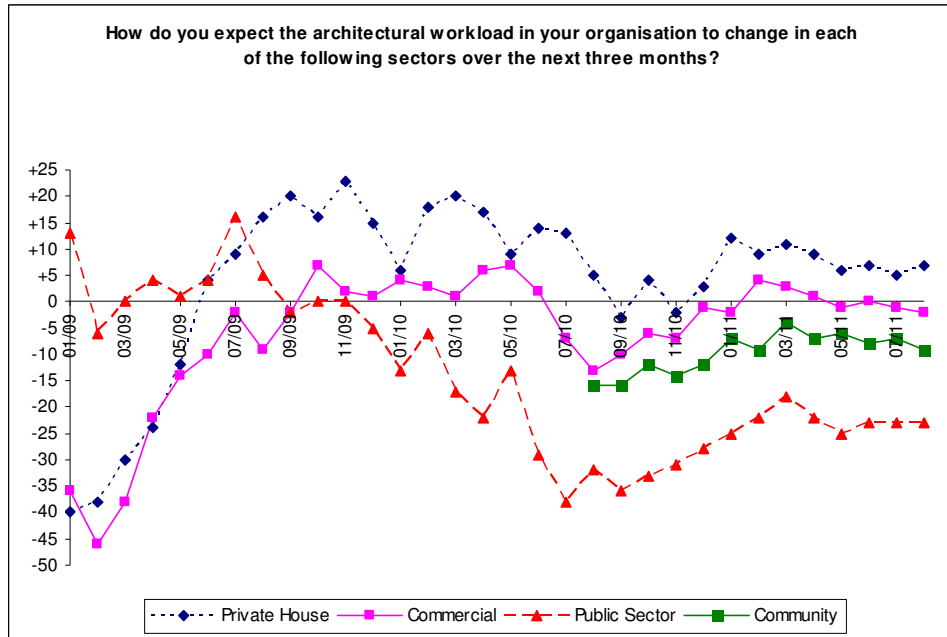


The sector forecasts saw little change remain this month. The private housing sector forecast (balance figure +5) increased slightly and remains the most robust of our sector forecasts. The commercial sector forecast fell marginally to -2 in August 2011. The public sector forecast (balance figure -23) was unchanged, whilst the community sector forecast (balance figure -9) fell marginally.

Larger practices (51+ staff) continue to anticipate some growth in the commercial sector and remain generally more confident about future workload levels than smaller and medium-sized practices. No size category of practice is predicting growth in the public or community sectors during the next quarter.

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

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Future staffing levels (August 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	9
Stay the same	85
Increase	6
TOTAL	100
Balance	-3

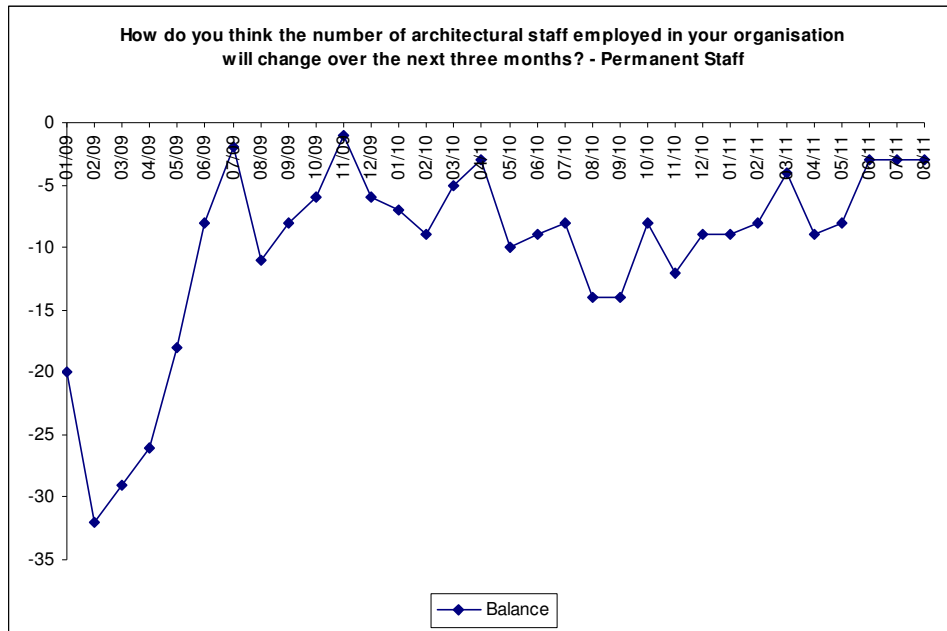
(The definition for the balance figure is the difference between those expecting to employ more permanent staff in the next three months and those expecting to employ fewer.)

The RIBA Future Trends Staffing Index is unchanged for the second consecutive month at -3 in August 2011, reinforcing anecdotal evidence of little activity in the employment market for salaried architects. When asked about how the number of temporary staff employed will change over the next three months our practices were slightly more positive (balance figure +1).

22% of our respondents reported that they have personally been under-employed in August 2011, representing an improvement from the July figure of 27%.

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

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In their anecdotal comments, our practices report a very flat market and continuing intense fee competition. The bespoke housing market continues to be the sector with the most solid work levels. Larger practices in London and the South are detecting some renewed growth in the commercial sector, but at the same time, however, the full impact of public sector capital spending cuts is now becoming more evident.

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 193 practices took part in the Survey in August 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.