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](http://www.architecture.com).*

The following is a summary analysis of the results from the May 2011 Survey returns.

*Future workload (May 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 | 24 |
| Stay the same | 50 |
| Increase | 26 |
| TOTAL | 100 |
| Balance | +2 |

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

The RIBA Future Trends Workload Index for May 2011 is +2, falling from +8 in April 2011. Confidence about future work prospects has weakened somewhat for all sizes of practice this month.

In terms of geographical analysis, practices based in London, the South of England, and Wales and the West returned more optimistic future workload forecasts than those in the rest of the United Kingdom.

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

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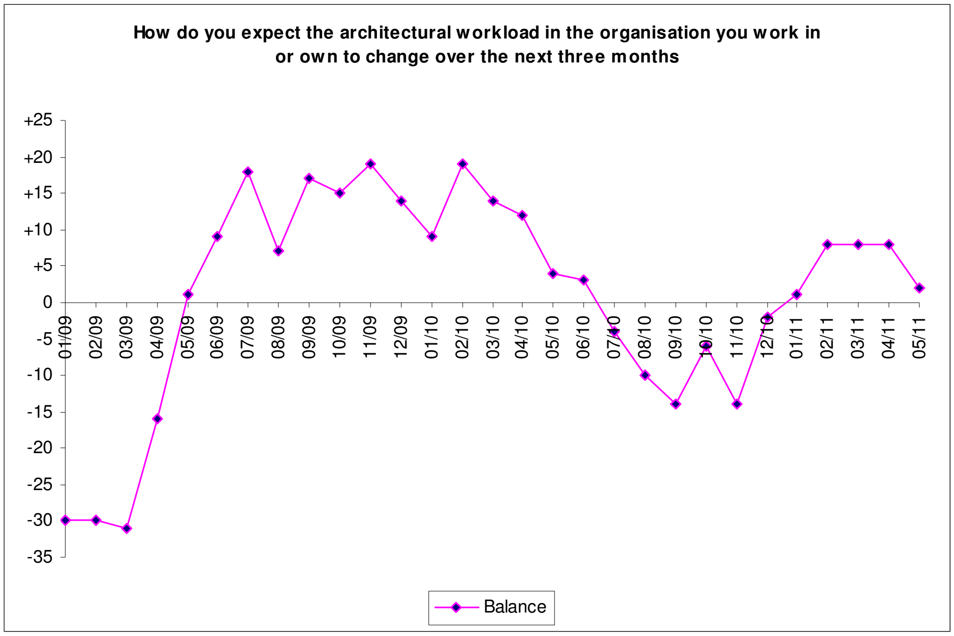


The private housing sector forecast (balance figure +6) remains positive, but the commercial sector forecast has fallen back slightly (balance figure -1) and the community (balance figure -6) and public sector (balance figure -25) forecasts remain in negative territory.

There continues to be evidence that larger practices in London are seeing some resurgence in the commercial sector.

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

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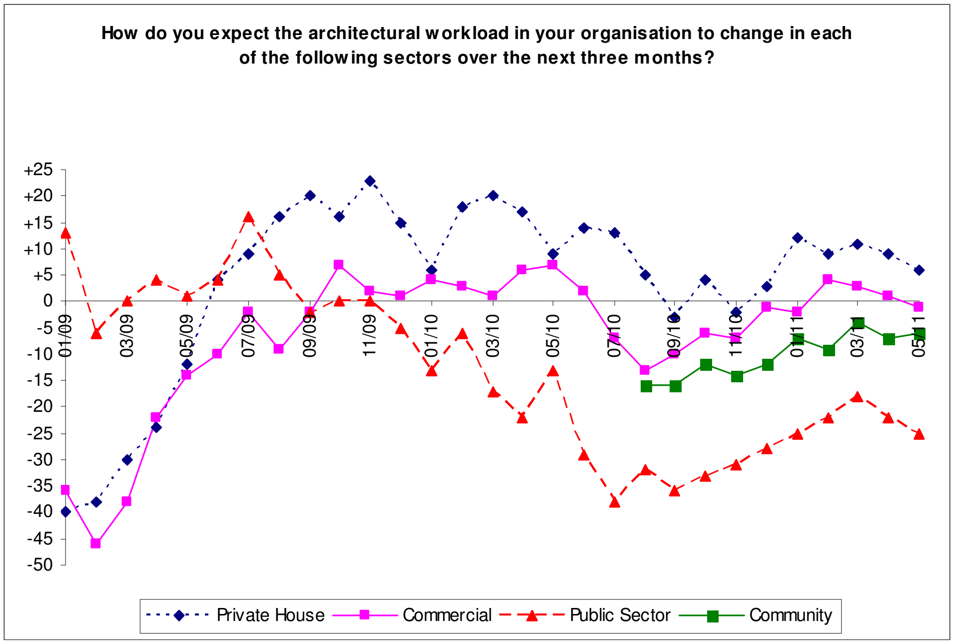


*Future staffing levels (May 2011)*

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

| Permanent Staff | % |
|---|---|
| Decrease | 15 |
| Stay the same | 78 |
| Increase | 7 |
| TOTAL | 100 |
| Balance | -8 |

(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 May 2011 is almost unchanged at -8, rising slightly from -9 in April 2011. Practices of all sizes throughout the UK remain cautious about increasing their staffing levels. There seems little prospect of a significant increase in vacancies during the next quarter.

29% of our respondents reported that they have personally been under-employed in the last month.

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

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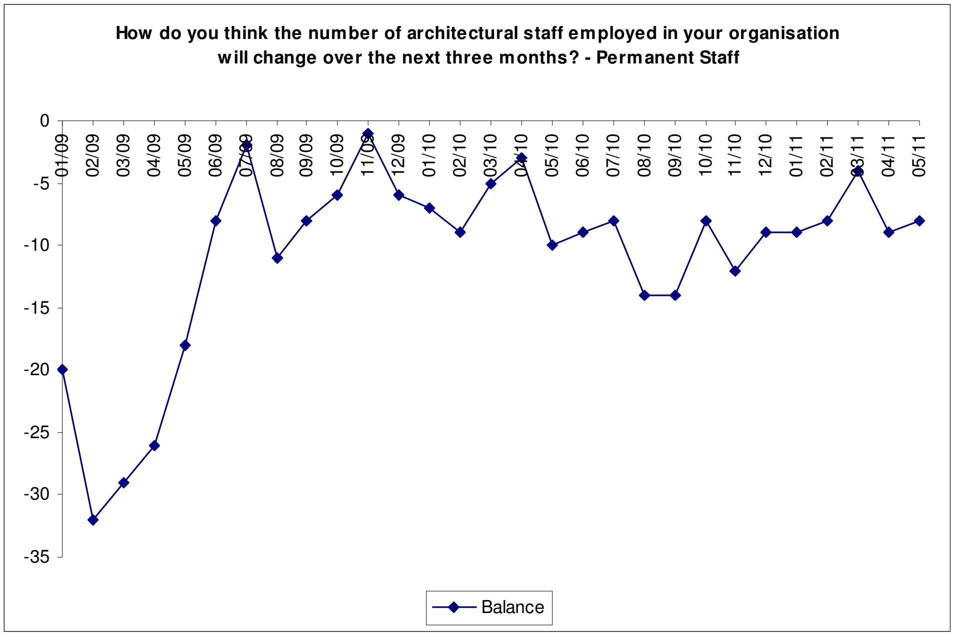


Year-out and post part 2 students continue to be severely impacted by the lack of employment opportunities in the architects' profession. Our practices report that they are currently employing less than half the number of students they employed even 12 months ago, reinforcing that this group is particularly vulnerable at this point in the economic cycle.

Our practices continue to report intense fee competition and greater use by clients of fee tendering for professional services. A number of practices comment on declining work opportunities in the public sector. The future outlook continues to be uncertain for many practices. More positively those working on high end residential projects, conservation work or with an established presence in key overseas markets are experiencing more resilient workloads. A number of correspondents call for the RIBA to develop a higher media profile in promoting the value offered by architects.

*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 220 practices took part in the Survey in May 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.*