
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. 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 March 2012 Survey returns.

Future workload (March 2012)

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	18
Stay the same	53
Increase	29
TOTAL	100
Balance	11

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

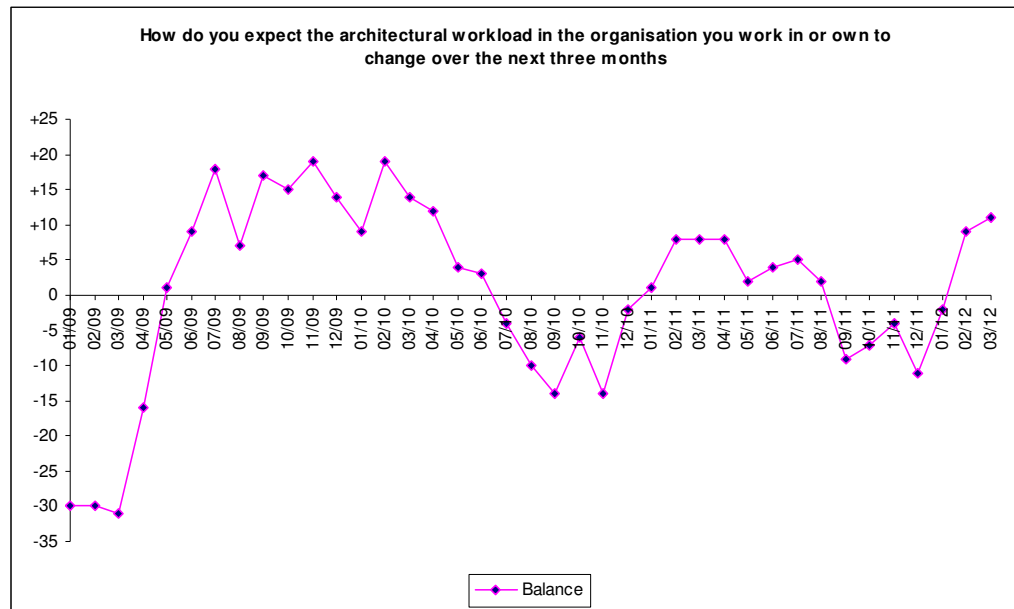
The RIBA Future Trends Workload Index for March 2012 stands at +11, rising slightly from +9 in February, and maintaining an upward trajectory for the third month in a row.

Medium sized practices (11 – 50 staff) remain the most positive about future workload levels, returning a balance figure this month of +20, but large practices (51+ staff) and small practices (1 – 10 staff) are more cautious.

In terms of geographical analysis, most of the nations and regions in the United Kingdom returned positive workload forecast balance figures in March 2012, the exceptions being the North of England and Northern Ireland.

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

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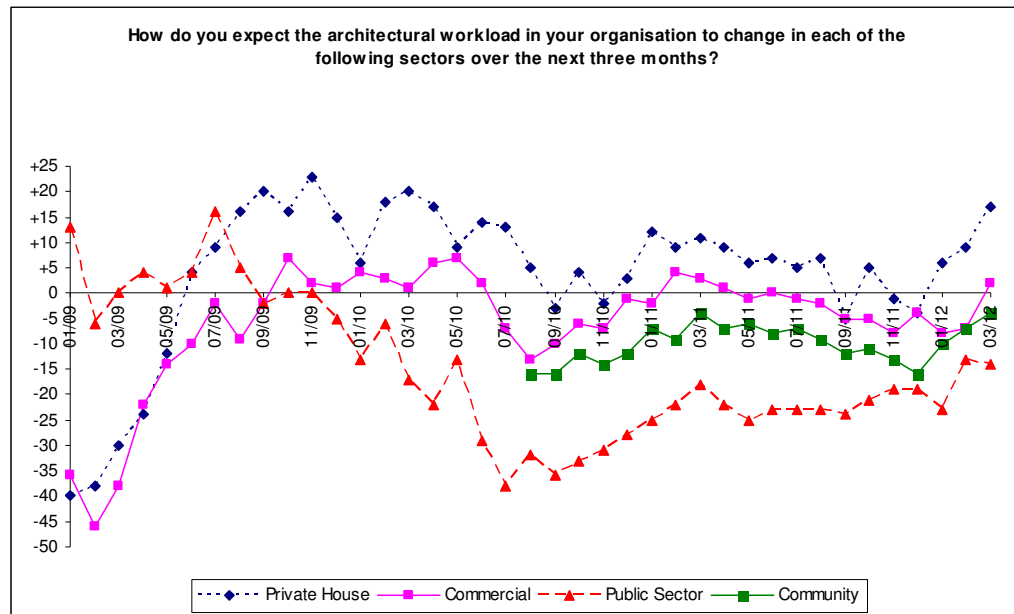
In terms of sector forecasts, the private housing forecast (balance figure +17), commercial sector forecast (balance figure +2) and community sector forecast (balance figure -4) all showed significant improvements, but the public sector forecast fell back very slightly to -14.

The private housing sector continues to be the best performing sector in our survey, particularly in London, the South of England and the Midlands and East Anglia.

It is of concern that despite talk of an export-led recovery, the percentage of work in progress in our survey sample which comes from overseas projects has now fallen to 2%, down from 9% in January 2009, suggesting that practices are generally experiencing difficulties in finding new overseas market for their services.

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

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Future staffing levels (March 2012)

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

Permanent Staff	%
Decrease	11
Stay the same	80
Increase	9
TOTAL	100
Balance	-2

(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 in March 2012 is -2, rising marginally from -3 in February 2012. Medium sized practices (11 – 50 staff), with a balance figure of +13, are currently more optimistic about being able to increase future staffing levels than small and large practices. There is not yet any sign of significant recovery in the jobs market for salaried architects, but overall staffing levels have clearly stabilised.

When asked if they had personally been under-employed in March 2012, 21% of our respondents replied yes; representing a significant improvement from the February 2012 figure of 25%.

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

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Anecdotal comments received continue to paint a very mixed picture, with many practices continuing to report intense fee competition and funding delays and stage-by-stage appointments, but others suggesting the first quarter of 2012 saw real improvements in the market.

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 March 2012. 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.