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. 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 April 2013 Survey returns.

Future workload (April 2013)

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	17
Stay the same	50
Increase	33
TOTAL	100
Balance	+16

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

The RIBA Future Trends Workload Index fell back slightly in April 2013 to +16, down from +19 in March 2013. This is the first fall in our key monthly workload indicator since November 2012, but it remains firmly in positive territory. Actual year-on-year workloads remain stable overall. Large practices (51+ staff) reported a 5% annual increase, but there is real no sign of a sustained upturn in total work in progress for architects at present.

Large practices (51+ staff) continued to be the most optimistic about future workloads, but all size categories of practices returned positive workload forecast balance figures.

In terms of geographical analysis, all the nations and regions in the UK except for Northern Ireland and Wales and the West returned positive balance figures this month.

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

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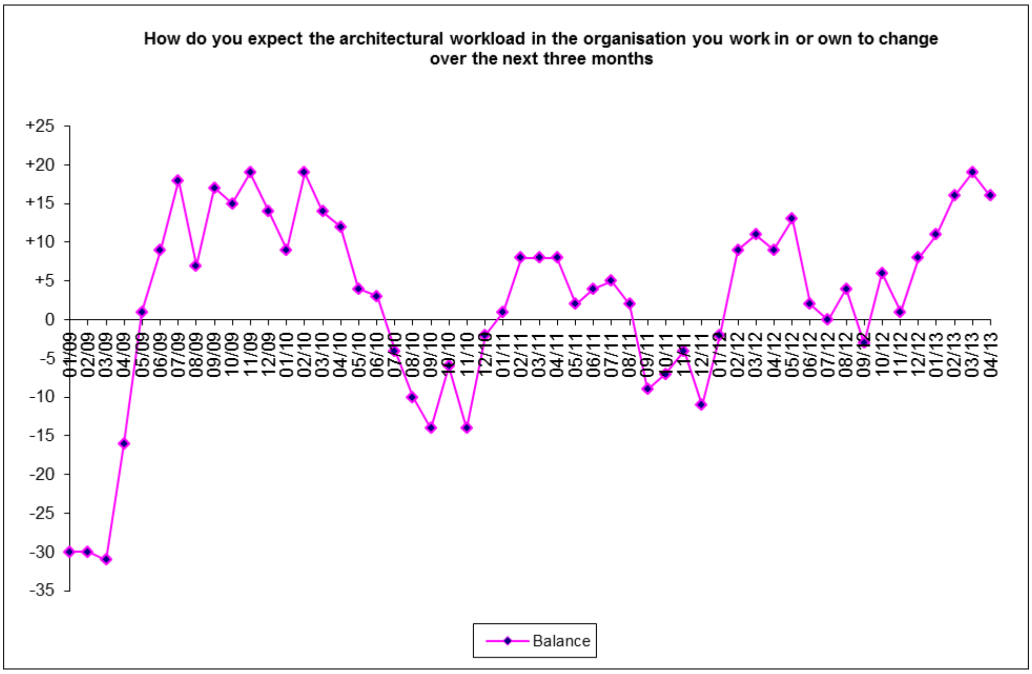

In terms of sector forecasts, the private housing sector forecast fell back marginally in April 2013 (balance figure +16) from its March 2013 level (balance figure +17), as did the commercial sector forecast (balance figure +3, down from +6 in March). The public sector forecast (balance figure -6) and the community sector forecast (balance figure -9) both saw somewhat larger falls.

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

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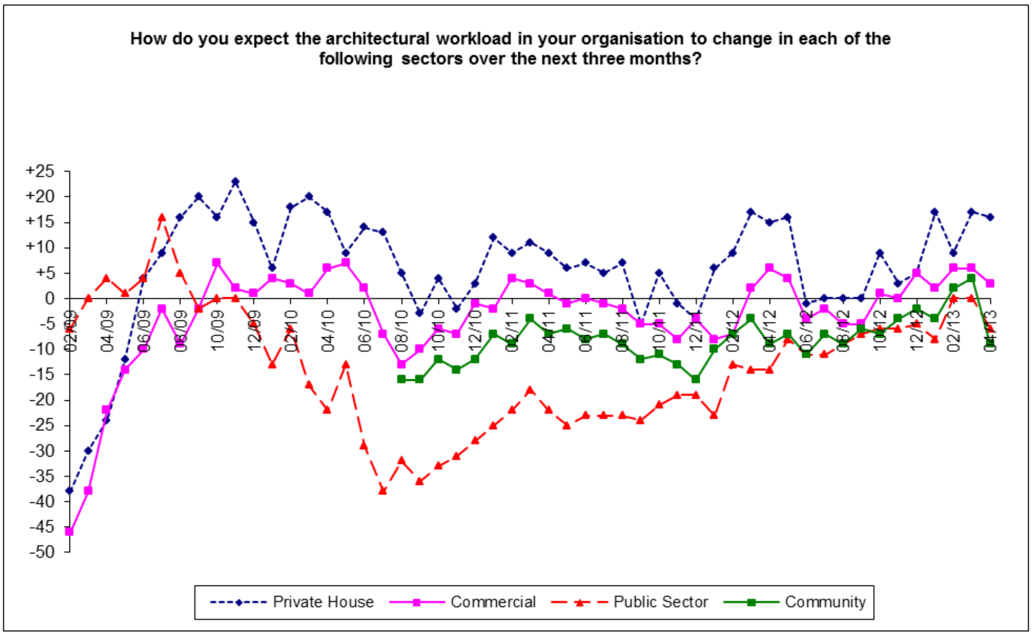

Future staffing levels (April 2013)

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

Permanent Staff	%
Decrease	6
Stay the same	86
Increase	8
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 increased a little in April 2013, rising to +2 and again entering positive territory. Reported overall actual staffing levels are stable, but practices remain cautious about taking on additional permanent staff. They remain slightly more confident about employing additional temporary staff to meet workload requirements.

Large practices (51+ staff) and medium-sized practices (11 – 50 staff) remain more confident about being able to increase their staffing levels during the next quarter than small practices.

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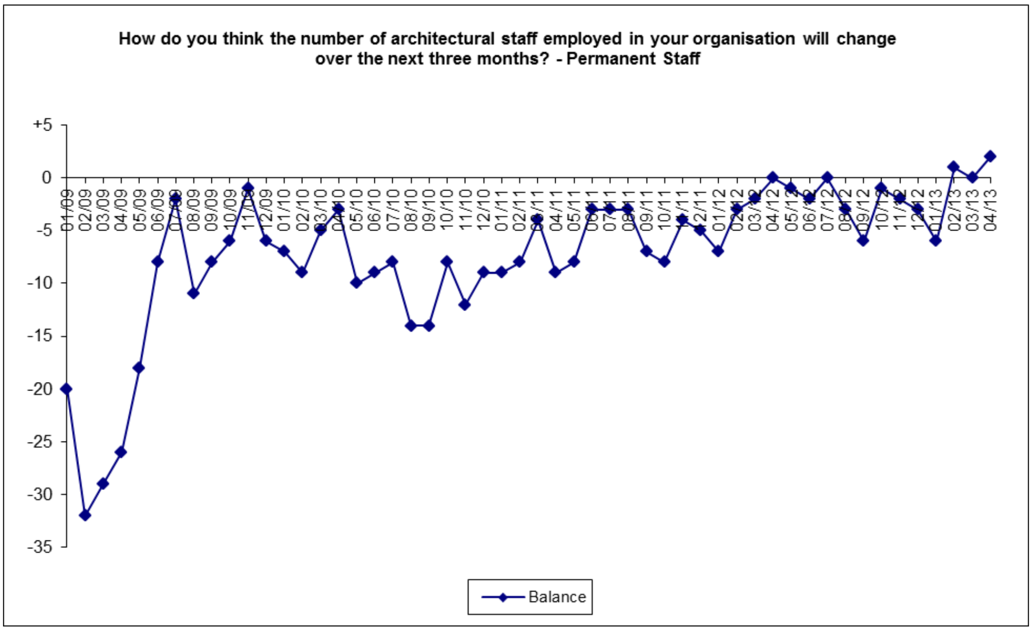
In April 2013, the percentage of our respondents reporting that they had personally been under-employed in the last month was 29%, up from 26% last month.

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



The anecdotal commentary we receive continues to paint a very mixed picture, with some practices reporting an increase in enquiries and commissions, but others commenting that the market remains intensively competitive. Whilst there are some positive signs and confidence levels have improved, the outlook seems to remain uncertain beyond a three month timeline for many practices.

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 213 practices took part in the Survey in April 2013. 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.