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 March 2013 Survey returns.

Future workload (March 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	15
Stay the same	51
Increase	34
TOTAL	100
Balance	+19

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

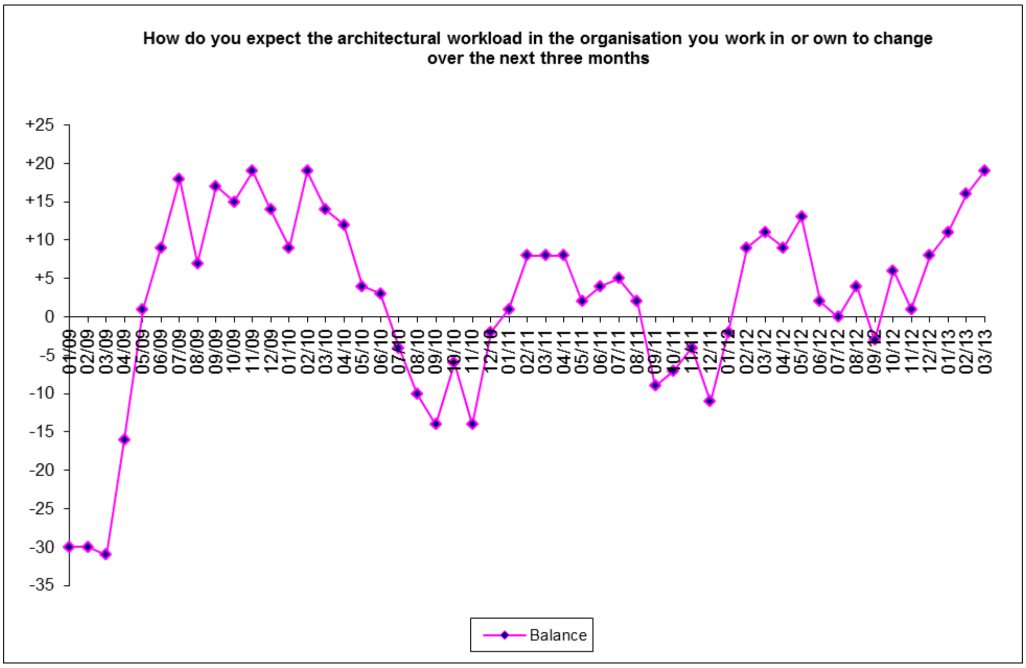
The RIBA Future Trends Workload Index increased in March 2013, rising to +19 from +16 in February 2013; the fourth consecutive monthly increase in a row, and a strong indication that architects in general remain more positive about future business prospects. However, this increased optimism is so far not reflected in real, actual workloads, with our practices reporting that overall activity is stable but not as yet growing in year-on-year terms.

This month 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 returned positive balance figures, with practices in London (balance figure +36) and the Midlands and East Anglia (balance figure +21) being the most positive at present.

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

Memorandum

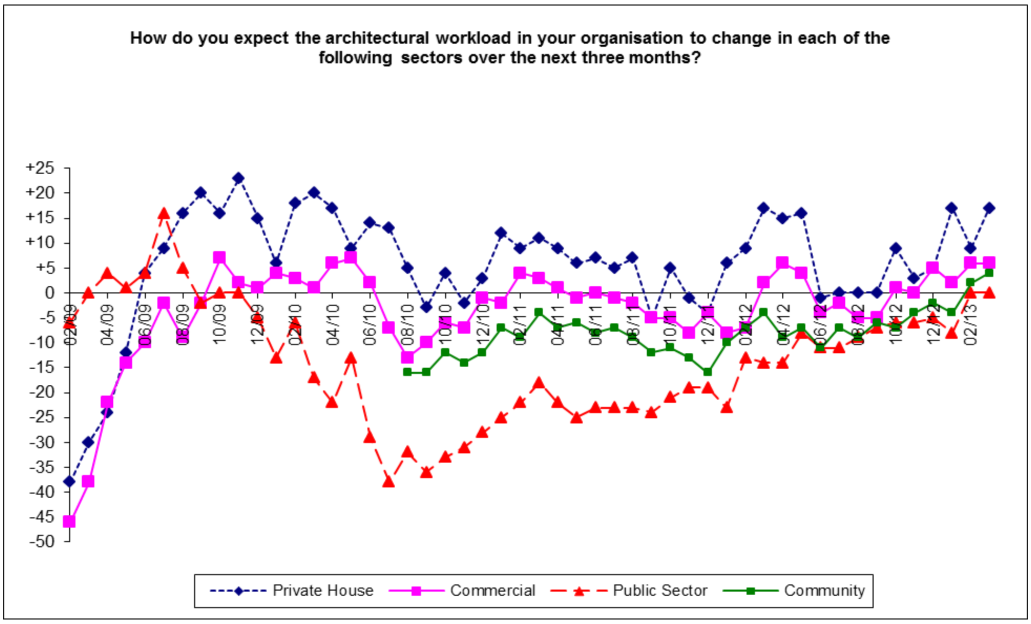


In terms of sector forecasts the private housing sector forecast recovered significantly in March 2013 (balance figure +17) from its February 2013 level (balance figure +9). The commercial sector forecast (balance figure +6) and the public sector forecast (balance figure zero) were unchanged. The community sector forecast in March 2013 (balance figure +4) improved slightly from its February 2013 position (balance figure +2).

Overall workloads across all sectors are reported as being stable at present.

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

Memorandum



Future staffing levels (March 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	9
Stay the same	82
Increase	9
TOTAL	100
Balance	0

(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 fell marginally to a balance figure of zero in March 2013, down from +1 in February 2013. Whilst reported overall actual staffing levels are stable, practices remain very cautious about taking on additional permanent staff. There is continuing evidence from our survey data that practices are more confident about employing additional temporary staff to meet workload requirements.

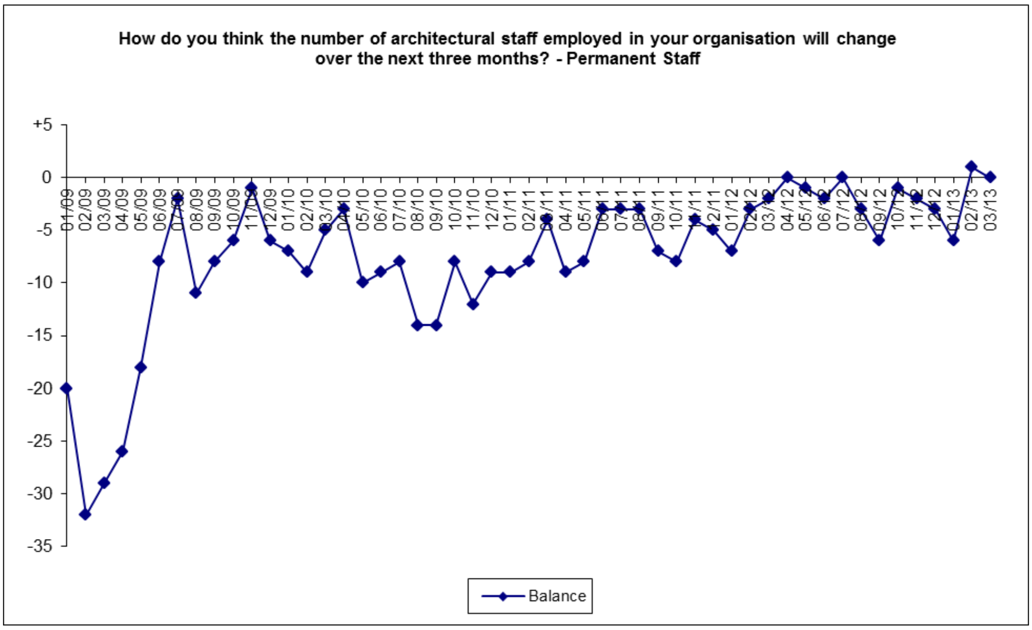
Mirroring the workload survey, practices located in London (balance figure +7) and the Midlands and East Anglia (balance figure +10) are the most optimistic when it comes to increased future staffing levels.

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

RIBA

Memorandum

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



Amongst the anecdotal evidence we receive there have been more positive comments in recent months, with a number of practices seeing an improvement in their workload pipeline. However, the overall outlook appears to remain very mixed, and many respondents continue to report difficulties for clients in obtaining investment funding, intense fee competition and frustrations with delays in the planning system.

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 235 practices took part in the Survey in March 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.