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 November 2013 Survey returns.

Future workload (November 2013)

How do you expect the architectural workload in the organisation you work in or own to change over the next three months

Overall

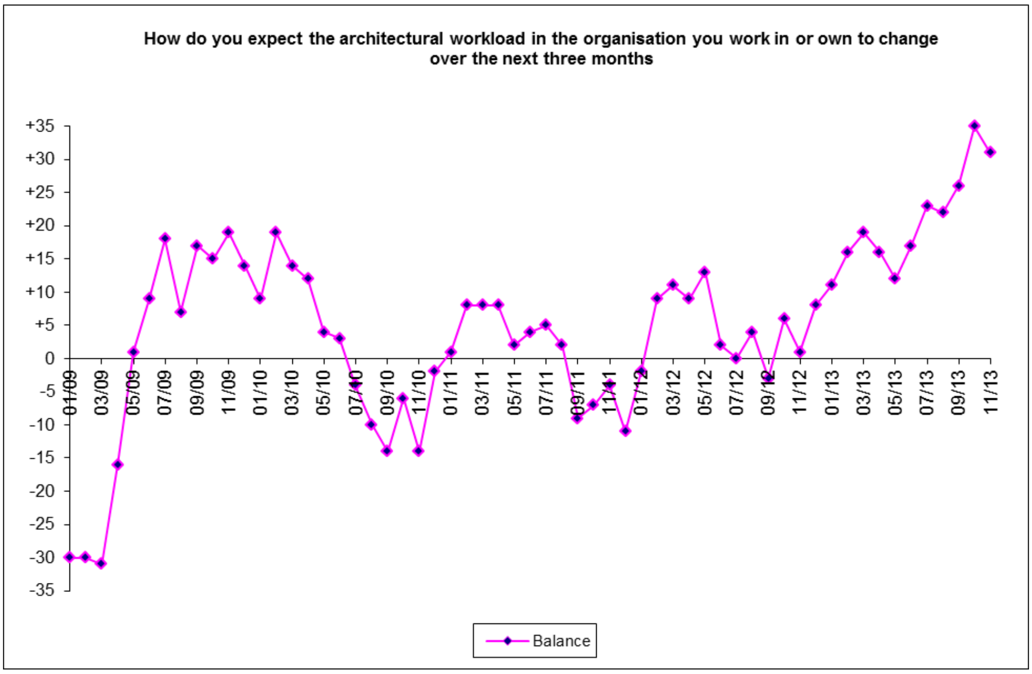
Expect	%
Decrease	9
Stay the same	51
Increase	40
TOTAL	100
Balance	+31

(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 this month, standing at +31 in November 2013 compared with +35 in October 2013, but remaining firmly in very positive territory. In terms of geographical analysis the highest balance figures were in Scotland (+50), the South of England (+41) and London (+40), but all nations and regions of the United Kingdom remained positive about future workloads, again reflecting a widespread increase in confidence levels.

In terms of practices by size, medium-sized practices (11 – 50 staff) were the most optimistic about prospects for workloads over the next quarter, returning a balance figure of +45.

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



Turning to our sector forecasts, the private housing sector workload forecast decreased a little to +29 in October 2013, down from +34 in November 2013, but private housing remains by far the most buoyant of our sector forecasts. The commercial sector workload forecast was unchanged at +18 in November 2013, and we continue to receive positive signals about improvements in this key sector.

Our participating practices remain cautious about the short term prospects for the public sector; the public sector workload forecast was unchanged at +3 this month. The community sector workload forecast saw a small rise to +7 in November 2013 up from a balance figure of +3 in October 2013.

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

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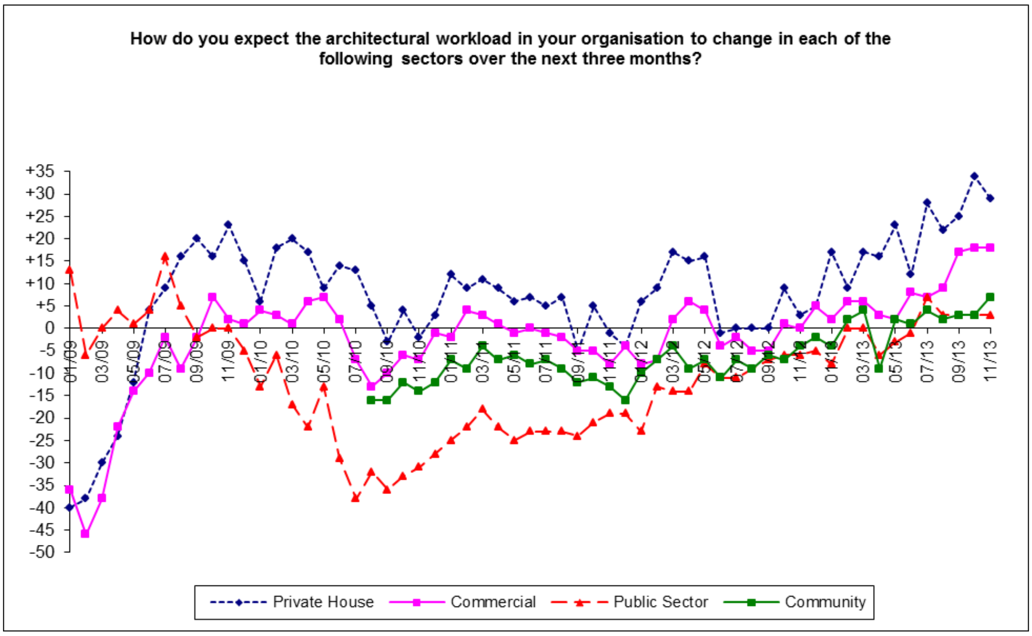

Future staffing levels (November 2013)

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

Permanent Staff	%
Decrease	4
Stay the same	81
Increase	15
TOTAL	100
Balance	+14

(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 stands at +11 in November 2013, down slightly from +14 in October 2013. Large practices (50+ staff) continue to be the most confidence about their ability to sustain higher staffing levels in the medium term, but practices in all size categories predict an overall increase in the work force.

In November 2013, the percentage of our respondents reporting that they had personally been under-employed in the last month was 19%, suggesting that there remains significant spare capacity within the architects' profession.

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

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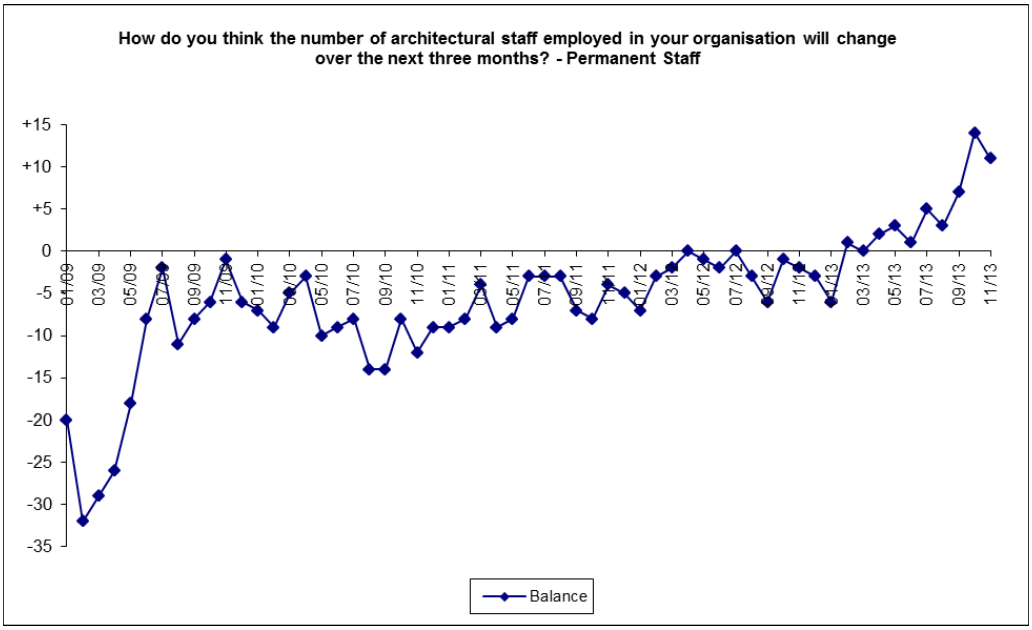

Anecdotal commentary received suggests that architects are continuing to see an increase in enquiries which is slowly being reflected in a modest overall upswing in actual workloads. At the same time it is clear that fee competition remains intense and there is little evidence yet of any widespread upward market pressures on fee levels.

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 225 practices took part in the Survey in November 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.