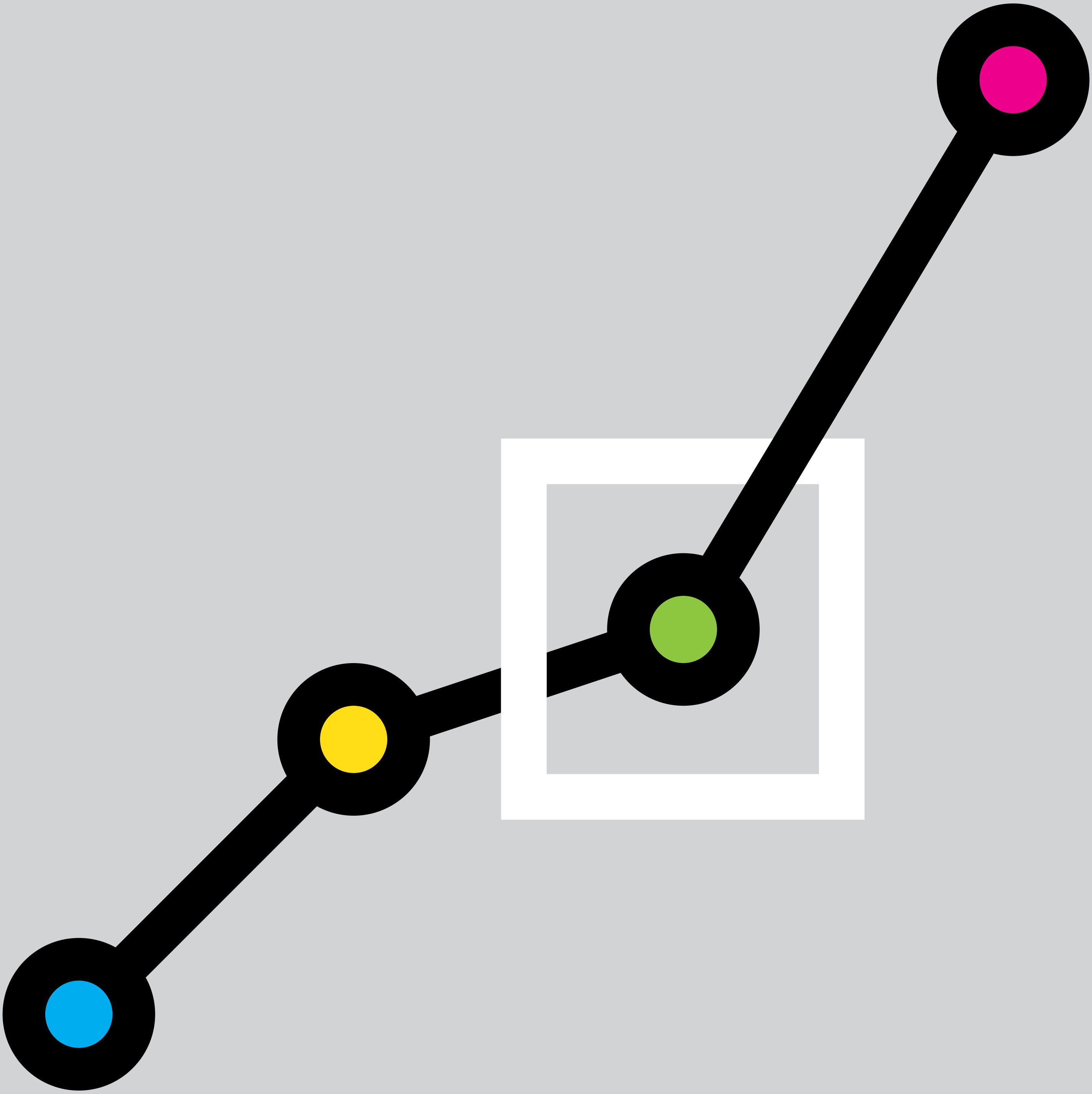
Future Trends Survey:

April 2015



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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 2015 Survey returns.

Future workload (April 2015)

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	10
Stay the same	44
Increase	46
TOTAL	100
Balance	+36

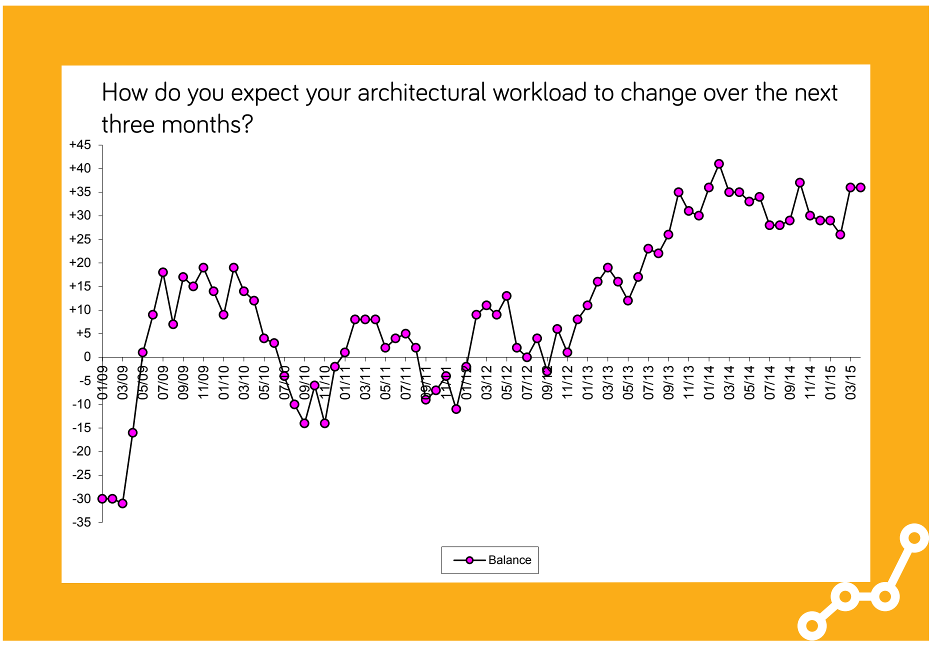
(The definition for the balance figure is the difference between those expecting more work and those expecting less.)

The RIBA Future Trends Workload Index was unchanged in April 2015, remaining at +36. In terms of geographical analysis practices located in London (balance figure +47) and the South of England (balance figure +37) are still the most confident about medium term workloads, but workload forecast balance figures continue to be positive in all nations and regions of the United Kingdom.

In terms of practice size, small practices (1 – 10 staff), with a balance figure of +29 are still very positive about the outlook for future workloads, but medium-sized practices (11 – 50 staff) with a balance figure of +74 and large-sized practices (51+ staff) with a balance figure of +75 continue to be even more optimistic about future growth. The overall picture is one in which confidence levels amongst architects about the future flow of work are high.

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

Notes
The balance figure is plotted here. The definition for the balance figure is the difference between those expecting more work and those expecting less.



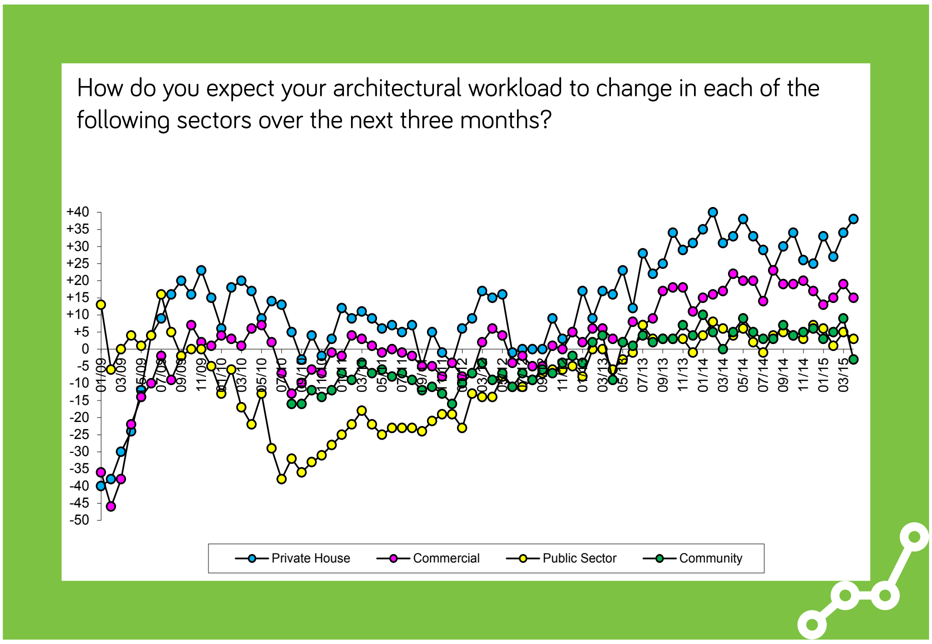
In terms of different work sectors, the private housing sector workload forecast increased this month, rising to +38 in April 2015 up from +34 in March 2015, and remains the best performing of our sector forecasts.

Our commercial sector workload forecast fell back slightly to +15 in April 2015 from +19 in March 2015, wiping out its previous month's rise.

The public sector workload forecast also decreasd this month, down to +3 in April 2015 from +5 in March 2015, reflecting some on-going uncertainty about future public sector capital spending.

Somewhat disappointingly the community sector forecast experienced a significant decline, down to -3 in April 2015 from +9 in March 2015, entering negative territory for the first time since April 2013.

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



Future staffing levels (March 2015)
How do you think the number of permanent architectural staff employed in your organisation will change over the next three months?

Permanent Staff	%
Decrease	1
Stay the same	80
Increase	19
TOTAL	100
Balance	+18

(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 conitinued its recent upward trend this month standing at at +18 in April 2015, up from +16 in March 2015. Only 1% of our participating practices anticipate that they will be emploiying fewer permanent staff in three months time, indicating a strong feeling that the current market for architectural services is stable or growing for the vast majority of practices.

Following a period in which larger practices have been the most positive about future staffing levels, this month it is medium-sized practices (11 - 50 staff) that have emerged as the most confident with a balance figure of +48. For large practices (51+ staff) the balance figure in April 2015 is +25. Small practices (1 - 10 staff) remain a little more circumspect with a balance figure of +14

Only 13% of our respondents reported that they had personally been under-employed in the last month.

Each quarter we ask our practices about their actual permanent staffing levels. Current staffing levels are 6% higher than in the equivalent quarter in 2014.

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

Anecdotal commentary received continues to reflect good growth in overall workloads for architects. However, widepsread reporting of intense fee competition in many sectors and tight profit margins remains prevalent amongst our correspondents.

Notes
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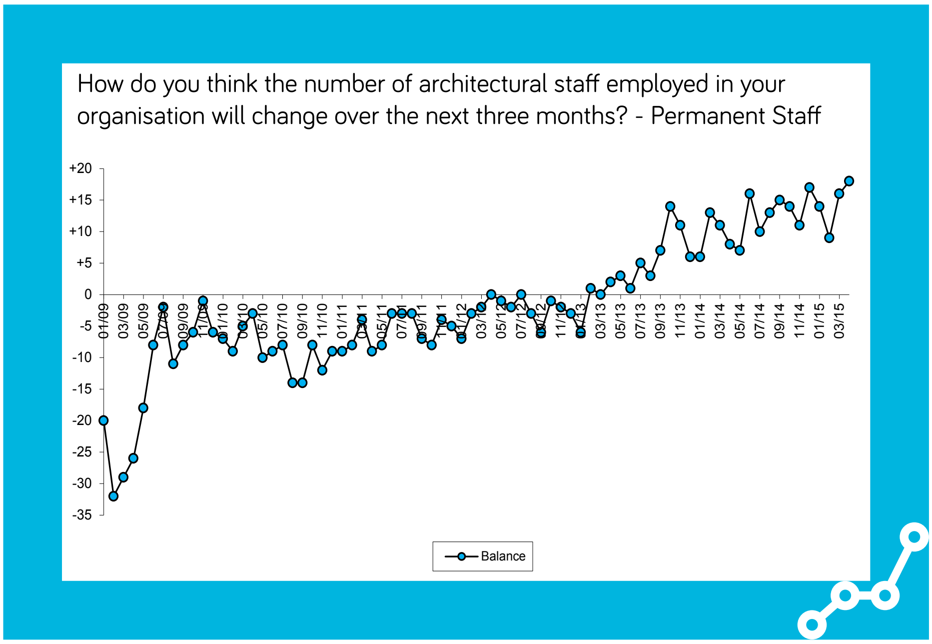

The RIBA Future Trends Survey is based on a representative sample of the range of different practice sizes and geographical locations which enables analysis of the trends in sectors, size groups and by nation and region.

A total of 201 practices took part in the Survey in April 2015. 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.