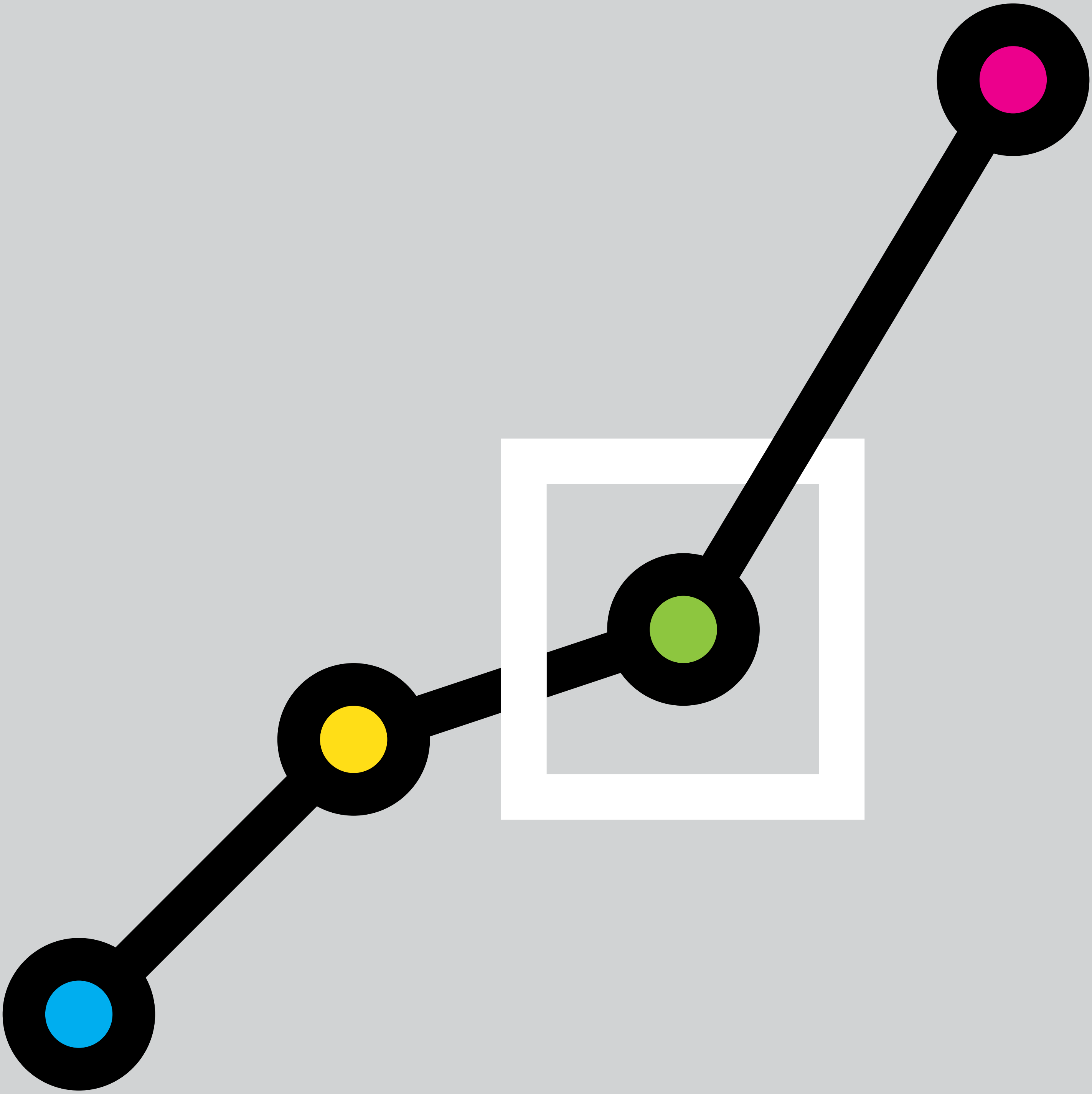
Future Trends Survey:

November 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 November 2015 Survey returns.

Future workload (November 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	53
Increase	37
TOTAL	100
Balance	+27

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

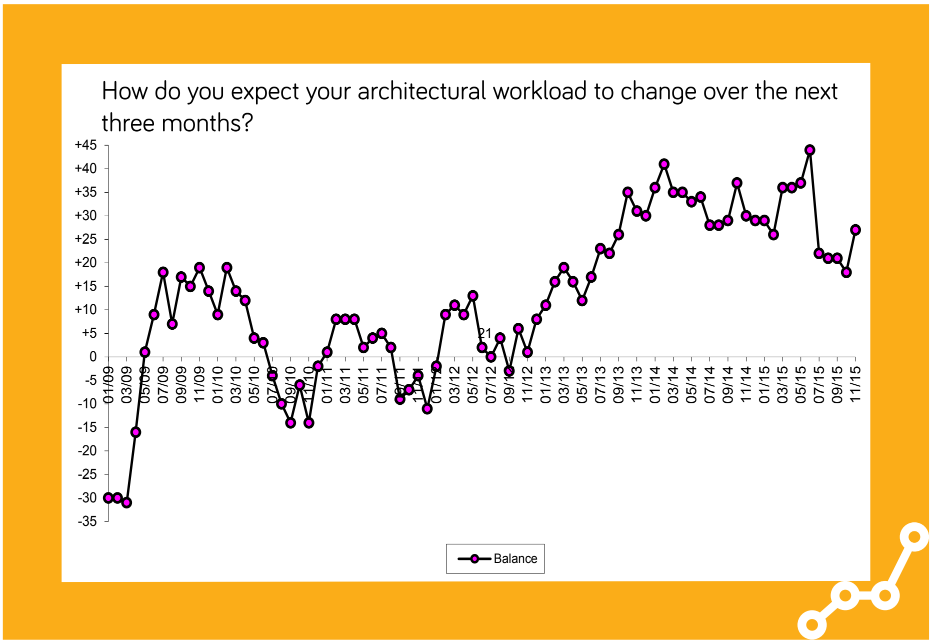
The RIBA Future Trends Workload Index increased substantially this month, rising to +27 in November 2015 from +18 in October 2015. This recovery in our headline Index following four consecutive months of falls suggests that confidence levels within the profession are stabilising.

In terms of geographical analysis, all nations and regions in the UK returned positive balance figures in November 2015, with only the Midlands and East Anglia standing out as a more cautious location, with a balance figure of just +5.

Analysing this months' data in terms of practice size, large practices (51+ staff), with a balance figure of +100, remain the most positive about future prospects. Medium-sized practices (11 - 50 staff), with a balance figure of +32, and small practices (1 – 10 staff), with a balance figure of +24, are somewhat less confident but still firnly standing on positive ground.

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.

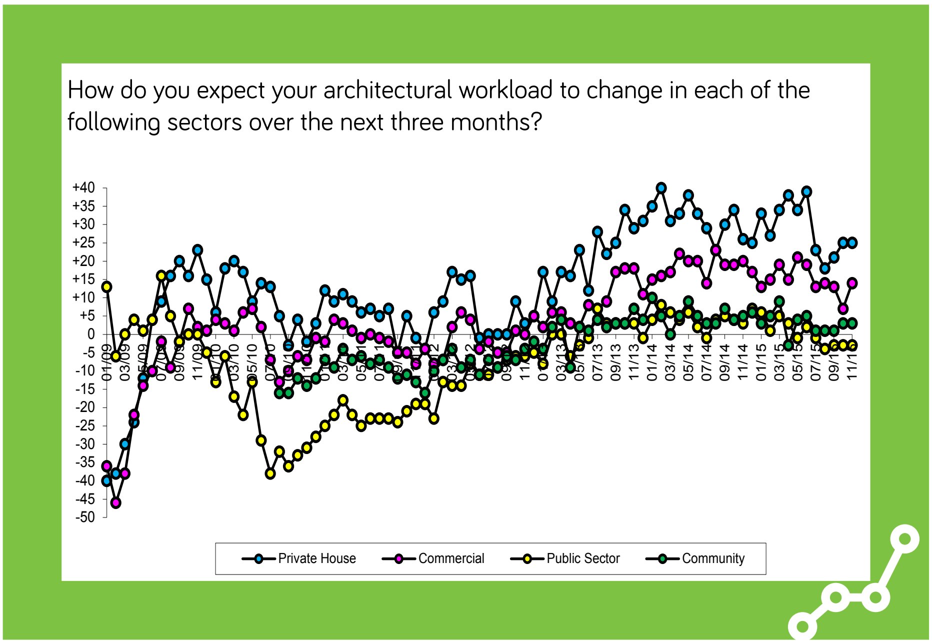


In terms of different work sectors, the private housing sector workload forecast was unchanged this month, standing at +25, and remaining by far the most robust of our sector forecasts.

The crucial commercial sector workload forecast jumped up to +14 in November 2015, compared with +7 in October 2015.

Both he public sector workload forecast (balance figure -3) and the community sector forecast (balance figure +3) unchanged this month.

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



Future staffing levels (November 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	2
Stay the same	82
Increase	16
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.)

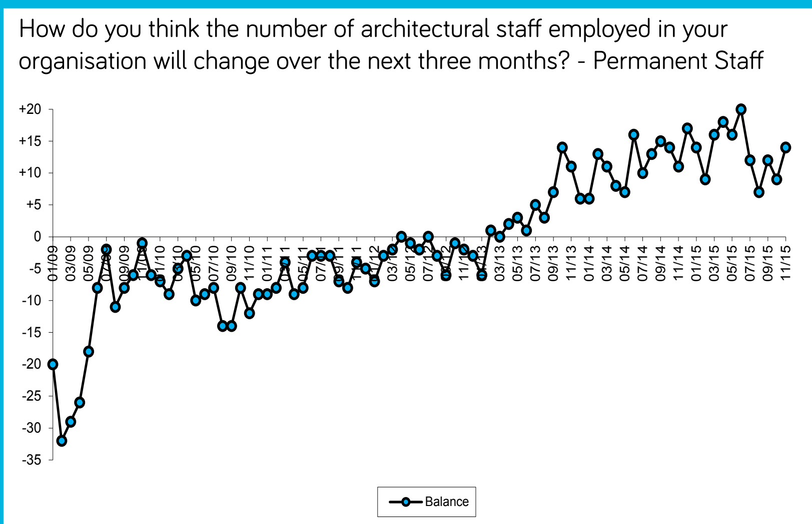
The RIBA Future Trends Staffing Index also recovered lost ground this month, rising to +14 in November 2015,, up from +9 in October 2015.

Small practices (1 – 10 staff) returned a staffing index balance figure of +10 this month and medium-sized practices (11 - 50 staff) a balance figure of +33. Large practices (51+ staff) continue to be the most confident about increasing staff numbers, with a balance figure of +50. Just 2% of practices expect to have fewer staff at the end of the next quarter.

Commentary received from our participating practices this month is generally upbeat, with some further evidence of increases in fee levels and confirmation that, as the employment market continues to improve, practices are finding it is taking more time to recruit new staff with appropriate skills. A few practices sound a note of caution that increases in construction tender prices are leading some clients to question the viability of projects moving into the construction phase.

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

Notes
The balance figure is plotted here. 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 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 204 practices took part in the Survey in November 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@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.