Future Trends Survey:

February 2016

RIBA

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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 February 2016 Survey returns.

Future workload (February 2016)

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	13
Stay the same	53
Increase	34
TOTAL	100
Balance	+21

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

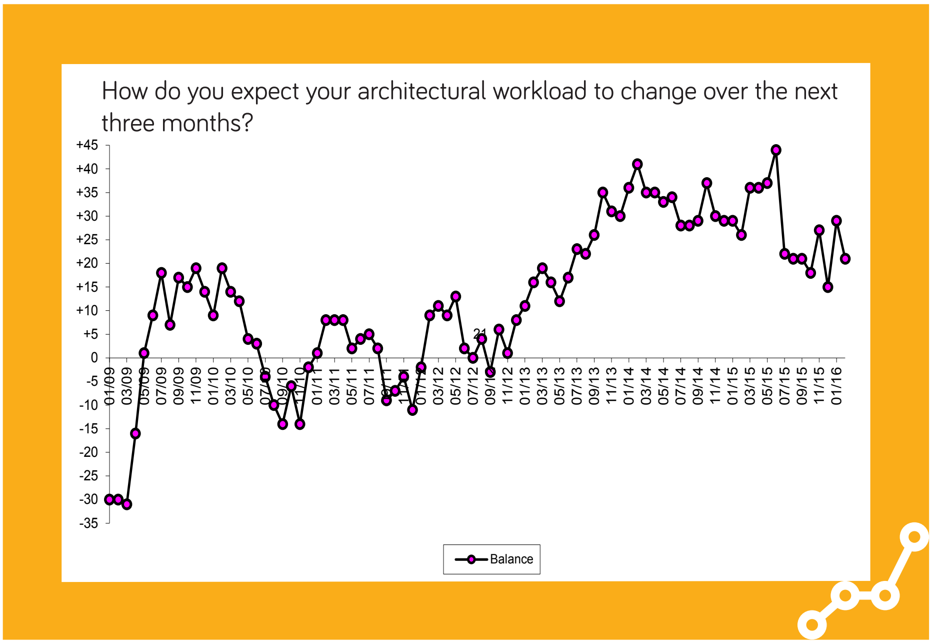
Our headline RIBA Future Trends Workload Index dipped this month, standing at +21 in February 2016 down from +29 in January 2016. The Workload Index has been somewhat volatile in the last few months, but remains in firmly positive terrritory, and the great majority of our participating practices continue to predict an increase in workloads in the short to medium term. This current volatility is perhaps more related to contuining macro-economic uncertainties rather than specific factors affecting the market for architectural services.

In terms of geographical analysis, practices in the North of England were amongst the most upbeat this month (balance figure +30), whilst those in Wales and the West (balance figure +15) and Scotland (balance figure zero) where more cautious about future prospects.

Analysing this months' data in terms of practice size, large practices (51+ staff), with a balance figure of +50, remain the most positive, but small practices (1 – 10 staff), with a balance figure of +25, and medium-sized practices (11 - 50 staff), with a balance figure of +19, also continue to predict increases in workload.

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.

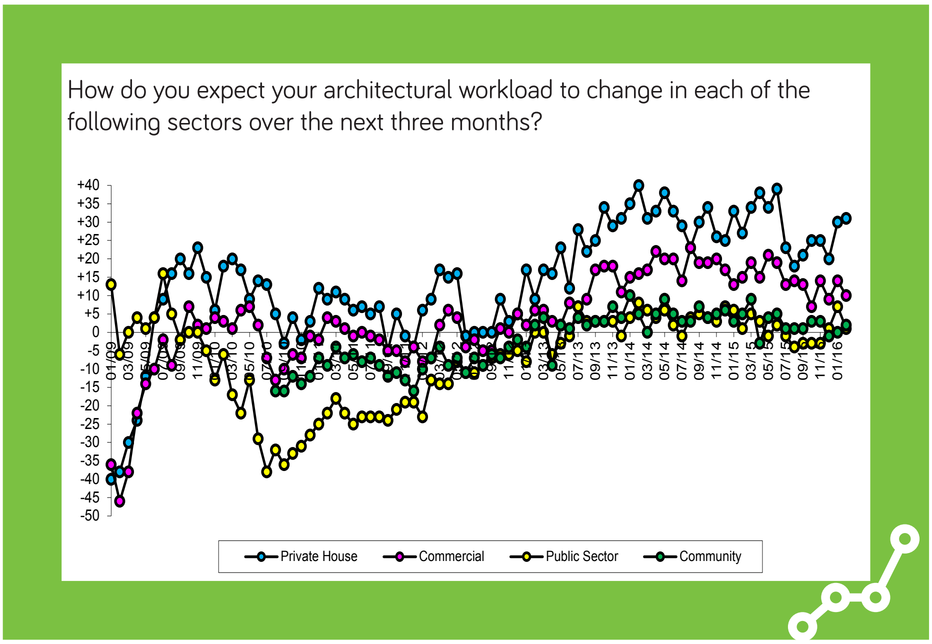


In terms of different work sectors, there was a mixed picture this month.

The private housing sector workload forecast increased marginally to +31 in February 2016, compared with +30 in January 2016. Private housing remains the best performing sector in our survey, illustrating how central this sector has been to continuing growth in architectural workloads.

The commercial sector workload forecast fell back a little to +10 in February from +14 in January. The public sector workload forecast also lost ground this month falling to +1 in February from +7 in January. By contrast the community sector forecast edged upwards to +2 in February, breaking into positive ground for the first time since November 2015.

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



Future staffing levels (February 2016)

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	85
Increase	11
TOTAL	100
Balance	+7

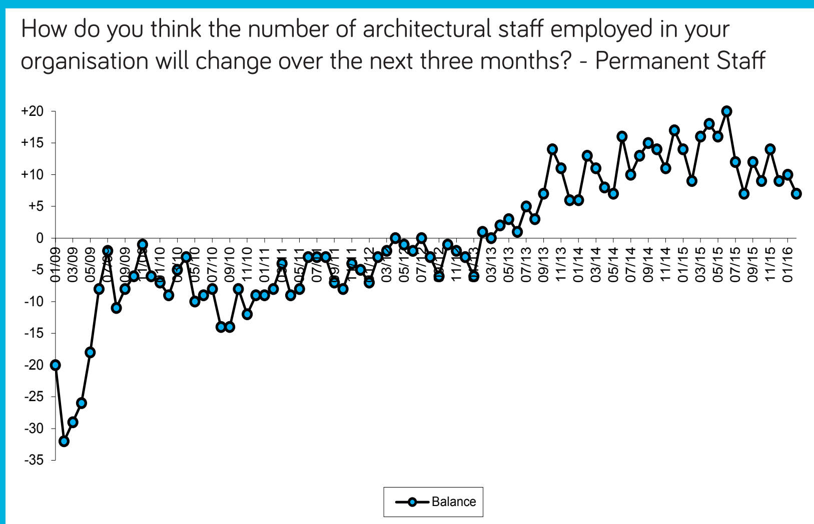
(The definition for the balance figure is the difference between those expecting to employ more permanent staff in the next three months and those expecting to employ fewer.)

The RIBA Future Trends Staffing Index fell back a little this month, standiing at +7 in February 2016 down from +10 in January.

Small practices (1 – 10 staff) returned a Staffing Index balance figure of +8 this month, whilst medium-sized practices (11 - 50 staff), with a balance figure of +30 and large practices (51+ staff), with a balance figure of +33, were more positive about taking on additional staff during the next quarter.

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



Commentary received from our participating practices continues to be broadly positive and a number of practices have reported a more stable pipeline of longer term, larger scale projects.

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 180 practices took part in the Survey in February 2016. 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.