

Future Trends Survey:

December 2017



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 December 2017 Survey returns.

Future workload (December 2017)

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	20
Stay the same	51
Increase	28
TOTAL	100
Balance	+8

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

The RIBA Future Trends Workload Index staged a fairly strong recovery this month, rising from -1 in November 2017 back up

into positive territory at +8 in December.

In terms of geographical analysis the picture remains mixed. Practices in the North of England were the most upbeat this month (balance figure +22) and the Midlands and East Anglia also stayed near the top of the leader board (balance figure +18). Practices in London continue to be much more pessimistic about future workloads, although the balance figure for London of -5 was somewhat better than in recent previous months.

All size categories of practice returned positive balance figures this month, and workloads seem to be fairly steady regardless of practice size.

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

Notes

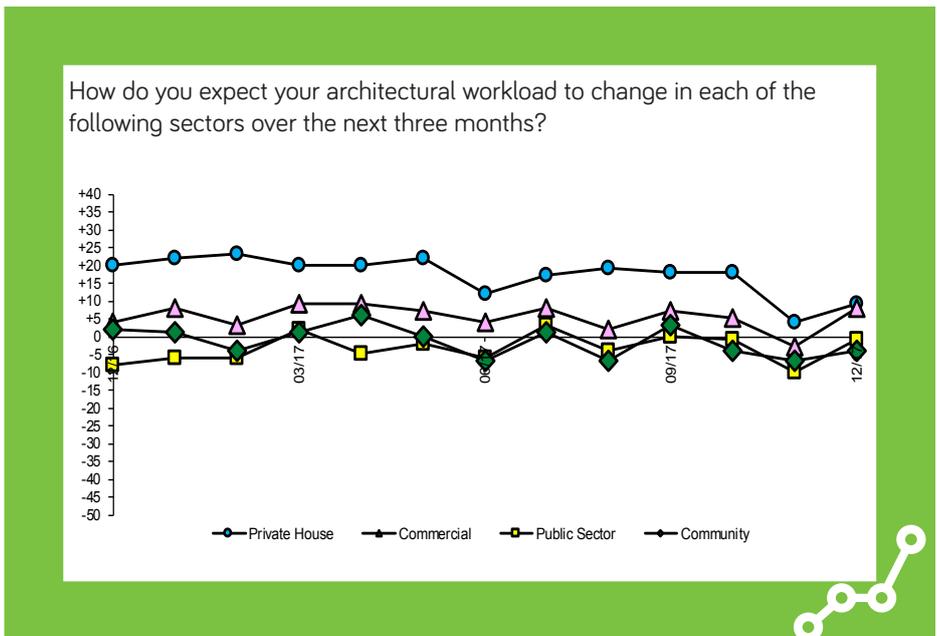
The balance figure is plotted here. The definition for the balance figure is the difference between those expecting more work and those expecting less.



In terms of different work sectors, all our sector forecasts moved upwards this month, reversing November's downward movement. The private housing sector workload forecast remains the most positive of our sector forecasts bouncing back up to +9 in December 2017. The commercial sector workload forecast had a balance figure of +8 in December 2017, up from -3 in November. These these continue to be the two work sectors that are primarily driving demand for architectural services.

The community sector workload forecast (balance figure -4) and the public sector workload forecast (balance figure -1) both saw gains but remain the weaker of our sector forecasts.

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



Future staffing levels (December 2017)

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

Permanent Staff	%
Decrease	7
Stay the same	81
Increase	12
TOTAL	100
Balance	+5

(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 bounced back this month, standing at +5 in December 2017 compared with -4 in November, climbing back out of negative territory.

When asked whether a lack of work over the last month had led to them personally being underemployed, just 13% said yes, suggesting that there is not an excessive amount of slack in the architectural labour market at present

and that employment prospects for salaried architects remain fairly stable.

Commentary received from our participating practices suggests that the private housing refurbishment and extension market remains generally brisk. A number of larger practices continue to cite Brexit uncertainty as a brake on development investment. Low price competition from non-architect purveyors of architectural services continues to be a talking point for a number of our correspondents.

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 212 practices took part in the Survey in December 2017. 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.