

# Future Trends Survey:

May 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](http://www.architecture.com)

The following is a summary analysis of the results from the May 2017 Survey returns.

### Future workload (May 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	12
Stay the same	53
Increase	35
<b>TOTAL</b>	<b>100</b>
Balance	+23

(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 little changed this month at standing at +23 in May 2017 up marginally from +22 in April.

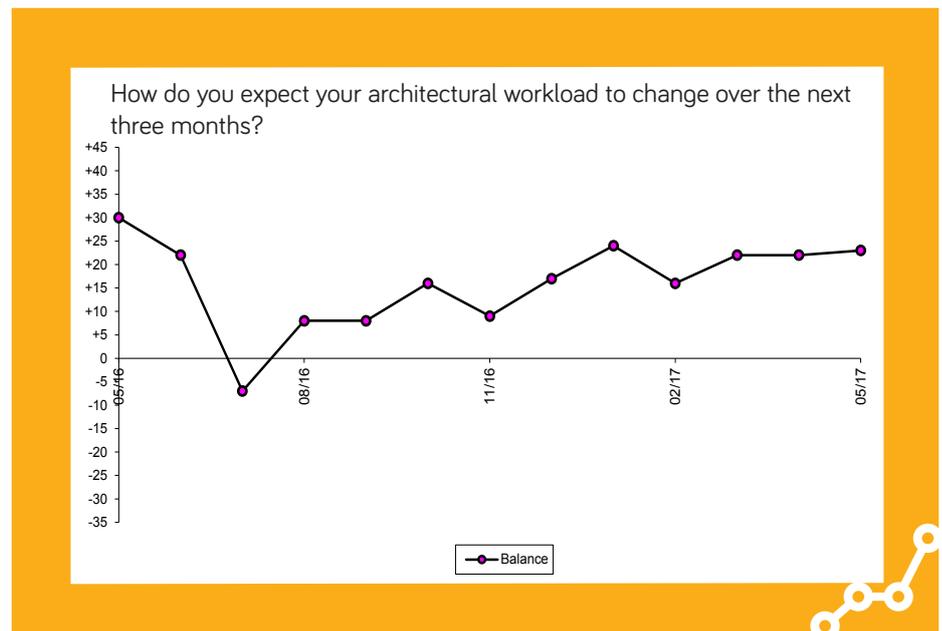
In terms of geographical analysis, practices in Northern Ireland (balance figure +50), the North of England (balance figure +36) and the South of England (balance figure +37) were the most optimistic about medium term workload prospects this month. Continuing the trend of recent months practices in London (balance figure +12) remained by some margin the most cautious about future workloads.

Analysing the May data in terms of practice size, large practices (51+ staff) returned a balance figure of +25 in May 2017. Small practices (1 - 10 staff), with a balance figure of +23, and medium-sized practices (11 - 50 staff) also with a balance figure of +23 were just a little less positive, but all size categories of practice on balance anticipate some growth in workloads over the next quarter.

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

#### Notes

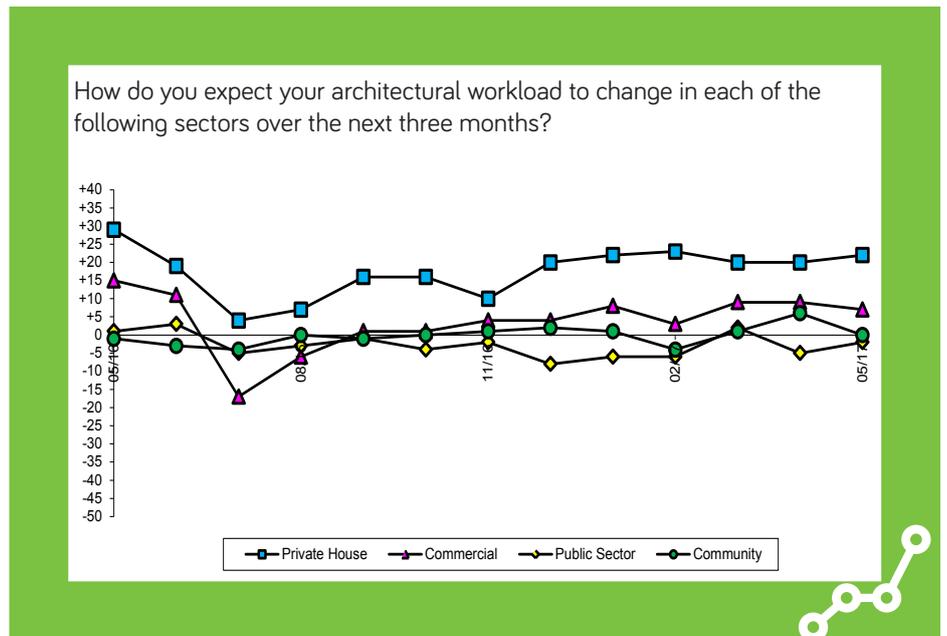
The balance figure is plotted here. The definition for the balance figure is the difference between those expecting more work and those expecting less.



In terms of different work sectors, the private housing sector workload forecast (balance figure +22) increased slightly in May 2017, but the commercial sector workload forecast (balance figure +7) was down a bit. These continue to be the two most strongly performing of our sector forecasts.

The public sector workload forecast recovered some recently lost ground, rising to -2 but remaining in negative territory. The community sector forecast saw a significant fall, down to zero in May 2017 from +6 in April.

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



### Future staffing levels (May 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	79
Increase	14
<b>TOTAL</b>	<b>100</b>
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 dipped a little further this month, falling to +7 in May 2017 from +9 in March.

Large practices (51+ staff), with a balance figure of +13, and medium-sized practices (11 - 50 staff), also with a balance figure of +13, both remained quite upbeat about future staffing levels. Small practices (1 - 10 staff) continued to be a little less confident, with a balance figure of +6 in May 2017.

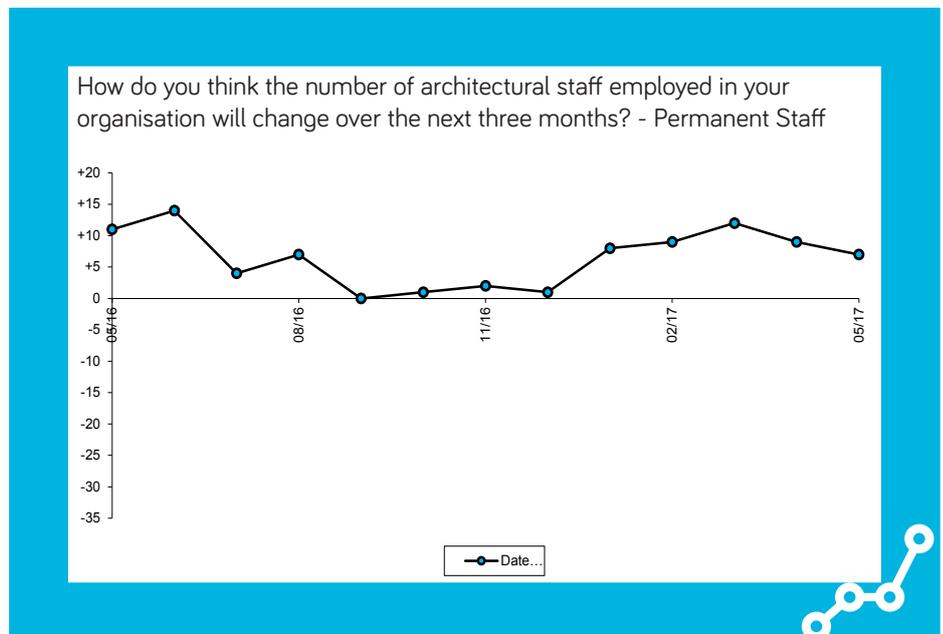
Commentary received this month from our participating practices continues to suggest a broadly stable market for architectural services and solid ongoing demand for qualified staff.

Overall the picture is one of relatively steady workloads rather than significant growth. The market for smaller scale residential projects appears to remain buoyant, but some of our practices are reporting a cooling market in the larger scale commercial sector.

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 231 practices took part in the Survey in May 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](mailto: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.