

Future Trends Survey:

October 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 October 2017 Survey returns.

Future workload (October 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	13
Stay the same	57
Increase	30
TOTAL	100
Balance	+17

(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 this month, remaining at +17 in October 2017.

In terms of geographical analysis the picture is very mixed, practices in the North of England (balance figure +33) and the Midlands and East Anglia (balance figure +50) remain the most optimistic about medium term workload prospects. Practices in London continue to be more pessimistic about future workloads, with the balance figure for London now falling into negative territory at -4, meaning that London practices are predicting a reduction in workloads over the next quarter.

Analysing the October 2017 data in terms of practice size, large practices (51+ staff) returned a balance figure of +67 in October. Medium-sized practices (11 - 50 staff), were also generally positive, returning a balance figure of +62. It was small practices (1 - 10 staff), with a balance figure of +6 that were sounding the loudest note of caution this month.

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.

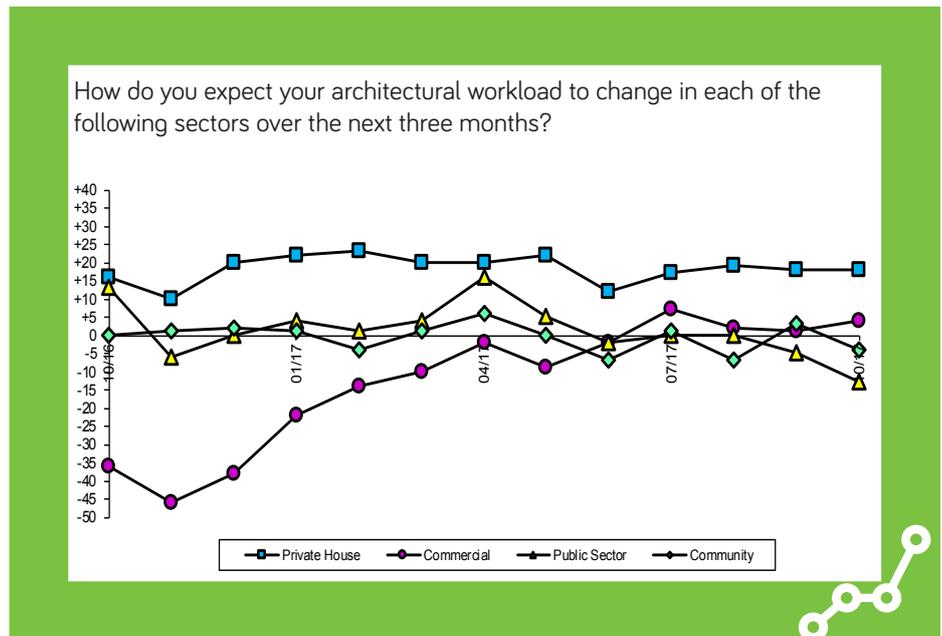


In terms of different work sectors, the private housing sector workload forecast was unchanged at +18 in October 2017, and remains by far the most positive of all our sector forecasts.

The commercial sector workload forecast fell back slightly this month, with a balance figure of +5 in October 2017, down from +7 in September.

Both the community sector workload forecast (balance figure -4) and the public sector workload forecast (balance figure -1) fell in October, and both these forecasts now stand in negative territory.

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



Future staffing levels (October 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	6
Stay the same	79
Increase	15
TOTAL	100
Balance	+9

(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 was up a little this month, standing at +9 in October 2017 compared with +5 in September. On balance the majority of practices expect their permanent staffing levels to either remain the same or increase over the coming quarter.

Small practices (1 - 10 staff), with a balance figure of +6, and medium-sized practices (11 - 50 staff), with a balance figure of +23, were more confident about future staffing levels

than large practices (51+ staff), who returned a balance figure of zero.

Commentary received from our participating practices continues to suggest that whilst overall levels of workload remain steady, there is a weakening in general business confidence that is particularly leading to greater caution amongst clients in the commercial sector. Some practices have also commented that they are having to invest greater resourcing in chasing outstanding fees.

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:



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 84 practices took part in the Survey in October 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.