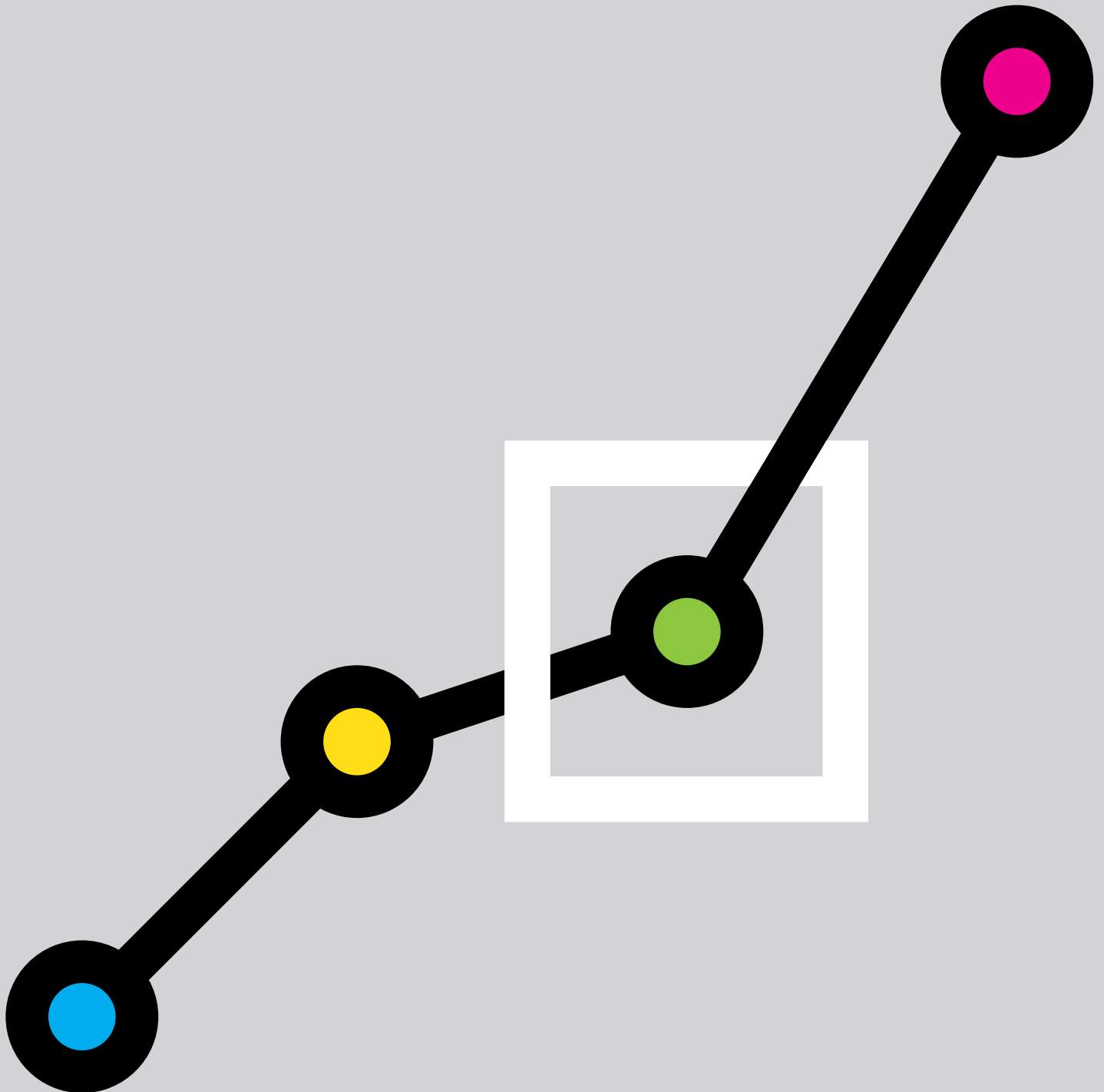


# Future Trends Survey:

April 2019



## 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 April 2019 Survey returns.

### Future workload (April 2019)

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		17
Stay the same		60
Increase		23
TOTAL		100
<b>Balance</b>		<b>+5*</b>

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

*\*'Increase' minus 'Decrease' does not equal the 'Balance' figure due to rounding.*

The RIBA Future Trends Workload Index held steady at +5 in April 2019, the same as in March 2019.

In terms of geographical analysis, practices in London have become more downbeat, returning a figure of -7 (down from zero in March 2019), suggesting an overall expectation of decreasing workloads.

The South of England nudged into positive territory, returning a figure of +3.

Midlands & East Anglia (+9) and Wales & The West (+14) both recorded a positive balance this month.

The North of England continued its run of leading positive sentiment, recording a balance figure of +20.

Analysing the April 2019 workload forecast data in terms of practice size, the following emerges:

**Small practices** (1 - 10 staff) record a one point rise in their index score, with a positive balance of +3, up from +2 in March 2019.

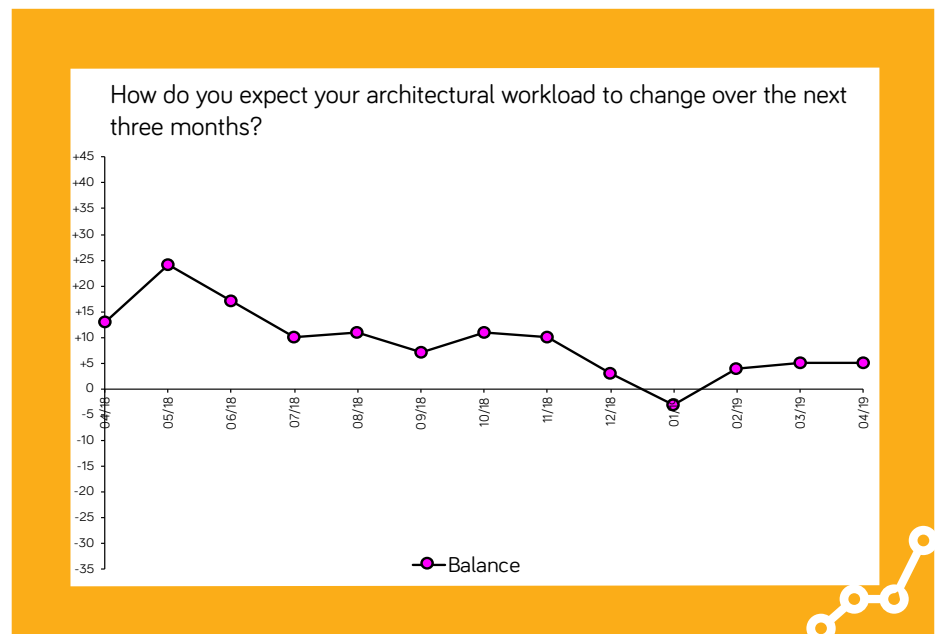
**Medium-sized practices** (11 - 50 staff) remained the most positive, returning a balance figure of +26, compared with +29 in March 2019.

**Large practices** (51+ staff) remain the least positive group; as in March 2019, large practices returned a balance figure of zero.

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 figures remain broadly consistent with the previous month. However, there has been a dampening of expectation for architectural work in all sectors, other than housing.

The public sector has slipped a little too. Having recorded its first positive figure for almost a year in March 2019, the public sector has reverted to a negative balance score (-3) in April 2019.

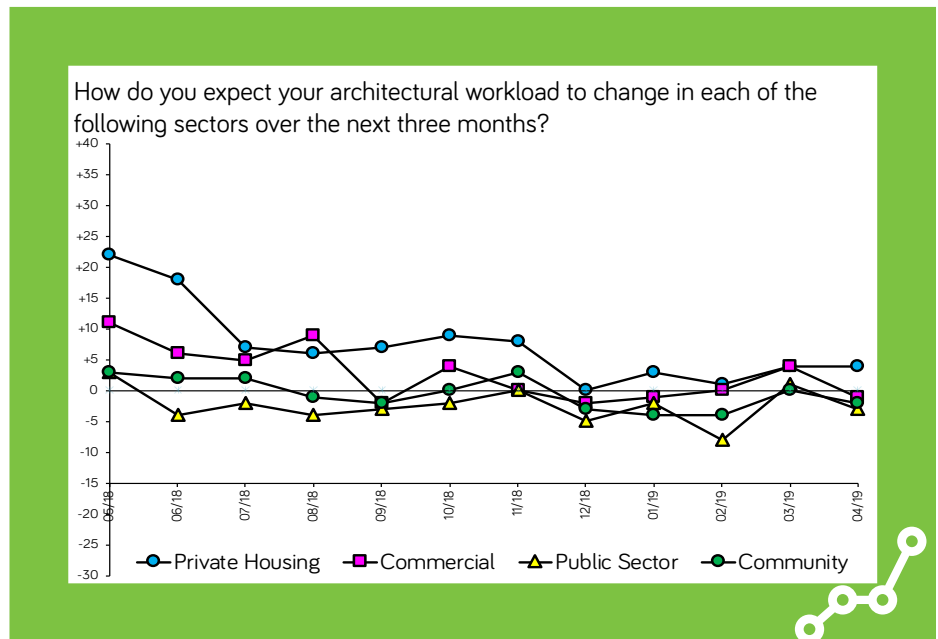
The private housing sector workload forecast remained at the same point as it was last month; a balance figure of +4.

The strongest area for architectural workload in private housing is the North of England, which returned a private housing balance score of +12. London, on the other hand, had a balance of -2.

The commercial sector slipped back into negative territory this month down from +4 in March 2019 to -1 in April 2019. Large practices, however, remain confident of future work in this sector, returning a balance score of +17.

The community sector has also slipped back into negative territory. Having been at zero in March 2019, it now stands at a balance figure of -2 in April 2019.

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



## Future staffing levels (April 2019)

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	84
Increase	10
TOTAL	100
<b>Balance</b>	<b>+4</b>

(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 again showed a very slight rise this month, rising to +4 in April 2019, up from +3 in March. Despite this slight rise, the architectural market remains subdued.

The subdued nature of the market for architectural services is highlighted by the number of architects reporting that a lack of work over the last month has led to them being personally underemployed.

Twenty one percent of architects said they were underemployed last month, the highest level since 2013.

This sense of underemployment was most acute in London, where 31% of respondents reported underemployment.

With only one in ten architectural practices looking to recruit over the next quarter, and with rising levels of underemployment, the employment market for salaried architects looks to be becoming increasingly challenging.

The lack of clarity about Brexit continues to dominate the narrative participating practices give about their workload.

The tone remains one of frustration as the ongoing and indeterminate Brexit debate maintains high levels of uncertainty within the architectural community, as well as the wider construction industry.

Architects report the number of available projects reducing through a lack of capital investment, cancellation, or postponement; due in large part to Brexit deadlock and uncertainty. This, in turn, is reported to be resulting in greater downward pressure on architects' fees.

Not all architects are downbeat however. Some tell us of the strength in the regions, and of the relative resilience of the housing market.

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 April 2019. 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.