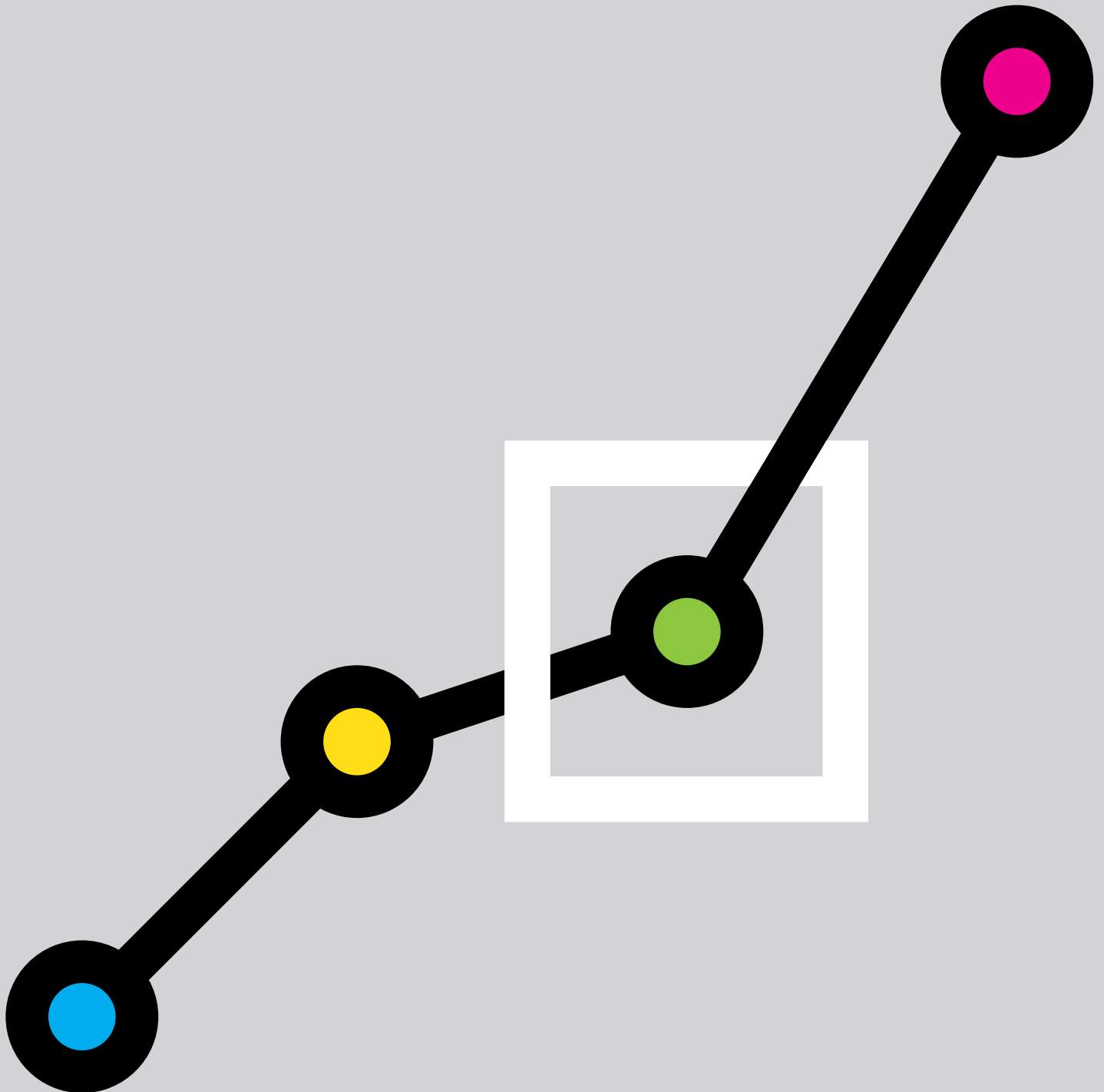


Future Trends Survey:

March 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

The following is a summary analysis of the results from the March 2019 Survey returns.

Future workload (March 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	20
Stay the same	56
Increase	24
TOTAL	100
Balance	+5*

(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 remained consistent, rising very slightly to +5 in March 2019, up from +4 in February 2019.

In terms of geographical analysis, practices in the South of England (balance figure -15) are the most downbeat about future workloads.

London, Wales & The West all recorded a zero balance this month; an evenly matched view of future workloads.

Practices in the Midlands & East Anglia underwent a change in sentiment about future workloads, returning a balance figure of +20 in March 2019, up from -3 in February.

The North of England sustains its standout level of optimism, with a balance figure of +31, one point higher than last month.

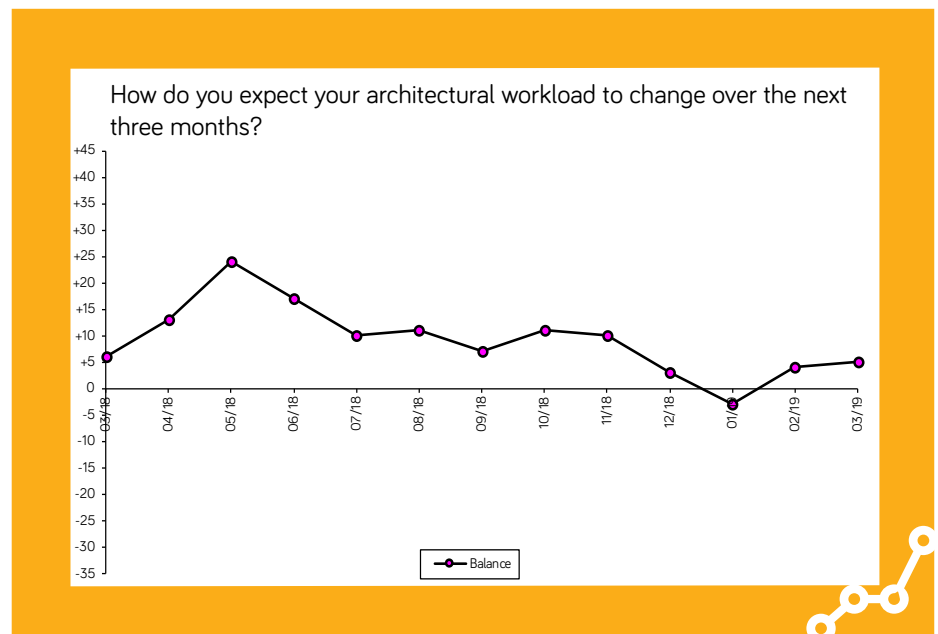
Analysing the March 2019 workload forecast data in terms of practice size, medium-sized practices (11 - 50 staff) were the most positive, returning a balance figure of +29.

Small (1 - 10 staff) and large practices (51+ staff) were more circumspect, returning balance figures of +2 and zero respectively.

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 has been no dramatic shift of sentiment. However, the balance figure for every sector is up, and this is the first time since November 2018 that none of the sector balances has been negative.

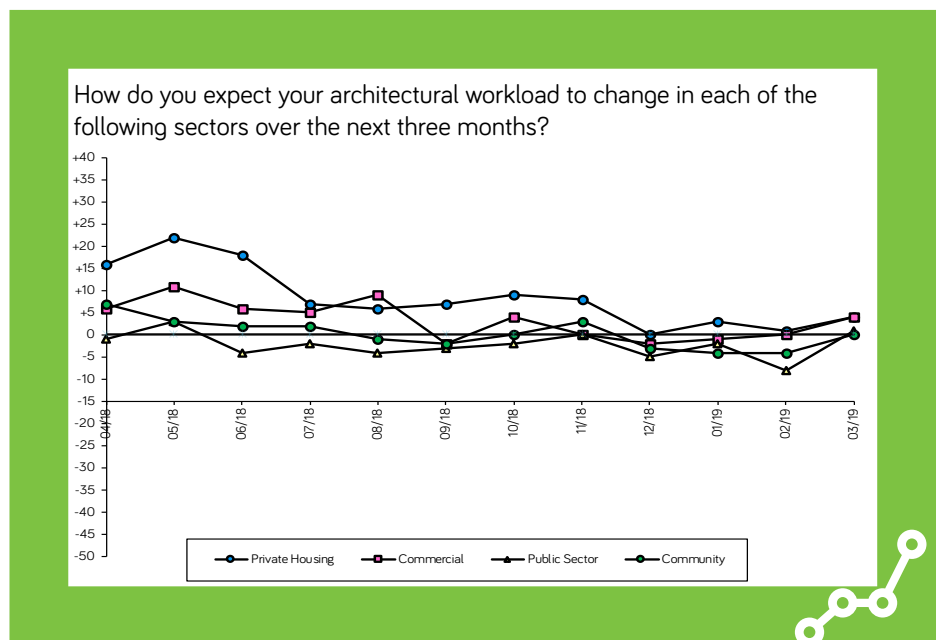
The stand out work sector this month is the **public sector**. Having dropped to -8 in February 2019, March 2019 sees a recovery to +1. This is the first month since May 2018 that the public sector has returned a positive figure.

The **private housing** sector workload forecast rose three balance points this month, up from +1 in February 2019, to +4 in March 2019.

The **commercial** sector continued its strengthening; up again this month, to a balance figure of +4 up from zero last month.

The **community** sector workload forecast has moved out of negative territory. Having returned a negative balance figure for each of the last three months, the community sector now stands at zero, up from -4 in February 2019.

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



Future staffing levels (March 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	85
Increase	9
TOTAL	100
Balance	+3

(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 showed a very slight rise this month, rising to +3 in March 2019, up from +2 in February. Whilst, over the last year, the staffing index has not dipped into negative territory, the market for architects remains subdued.

In March 2019, as at the time of writing, uncertainty about Brexit dominates public, political and professional discourse. This is reflected in the comments made by architects. The overall tone is one of frustration that the process is ongoing with no clear conclusion in sight.

Uncertainty is weighing down on architects' workload, with many reporting there being fewer project enquiries, or projects being delayed or cancelled. Aligned to this is a downward pressure on fees.

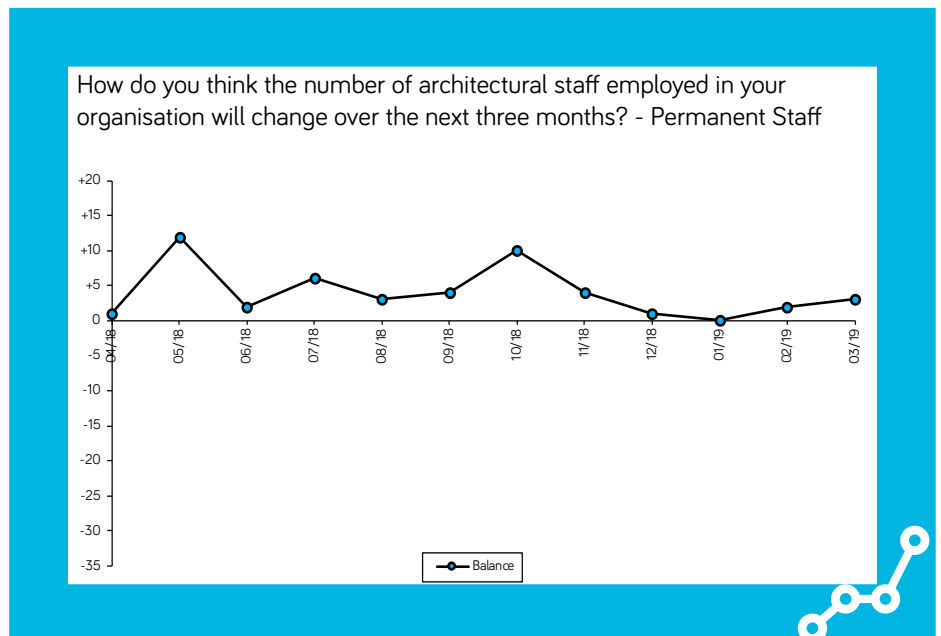
The fragility of the prime market in London and the weakening of the domestic extension/refurb market were directly referenced. That said, there were some who made more positive comments, particularly around the comparative resilience of the housing and residential sectors.

Overall though, the sentiment is clear; architects are looking for a swift and satisfactory resolution to the Brexit question.

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 244 practices took part in the Survey in March 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. 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.