Arcavia Consulting

MARKET INSIGHT · JULY 2026

The Shape of UK Architecture

2011–2026

Fifteen years of financial and headcount data from the UK's 100 largest architecture practices, and what it means for the people who run them.

£1.9bn
TOP-100 FEE POOL

43%
HELD BY THE TOP TEN

£246k
FEES PER ARCHITECT

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ABOUT THIS PAPER

Executive summary

This paper draws on fifteen years of published survey data covering the UK's 100 largest architecture practices, recording qualified architect numbers, total permanent UK staff and architecture fee income for every year from 2011 to 2026. We compiled the full dataset, analysed it, and highlight the following patterns and findings in the paper below.

The numbers describe the shape of the market clearly enough. What they cannot describe is how any of it feels inside a practice: what consolidation is doing to hiring plans, what the pay market is really doing beneath the published bands, or why people stay and why they leave. That is where practice leaders come in, and the closing pages of this paper explain how to take part in the consultation that runs alongside it.

01 **A market that has doubled.** The top-100 fee pool has risen from roughly £0.9bn of UK architecture fees in 2014 to £1.9bn in 2026, earned by a qualified workforce only a third larger.

02 **The pull to the top.** The ten largest practices now take 43% of all fees, up from 35% in 2014, which is more than the eighty practices ranked 21st to 100th earn between them.

03 **The international practice influence.** Foster + Partners alone accounts for £468m in UK fees, roughly a quarter of the entire pool, driven by an explosion of Middle East work, while Gensler, AECOM and Mott MacDonald have arrived in the upper reaches of the table for the first time.

04 **The productivity puzzle.** Fee income per qualified architect has doubled, from about £124,000 to £246,000, while permanent UK staffing per architect has not moved. Outsourced and offshore delivery sits outside the data entirely and may well flatter the figure.

05 **The middle of the table.** Two-thirds of mid-tier names persist over any five-year window, but half of them changed over the decade, replaced increasingly by multidisciplinary consultancies and US entrants, with private capital now sitting behind practices at the very top.

06 **Where the growth has landed.** Growth arrives in step changes rather than increments, with the largest riser adding £297m over the decade and nine further practices adding between £12m and £48m each, by routes into growth that look nothing like one another.

07 **The practices that held steady.** A group of long-established studios has carried roughly the same architect headcount and the same nominal fee income through fifteen years of turbulence, which raises a question worth asking of any practice: how much of that consistency was chosen?

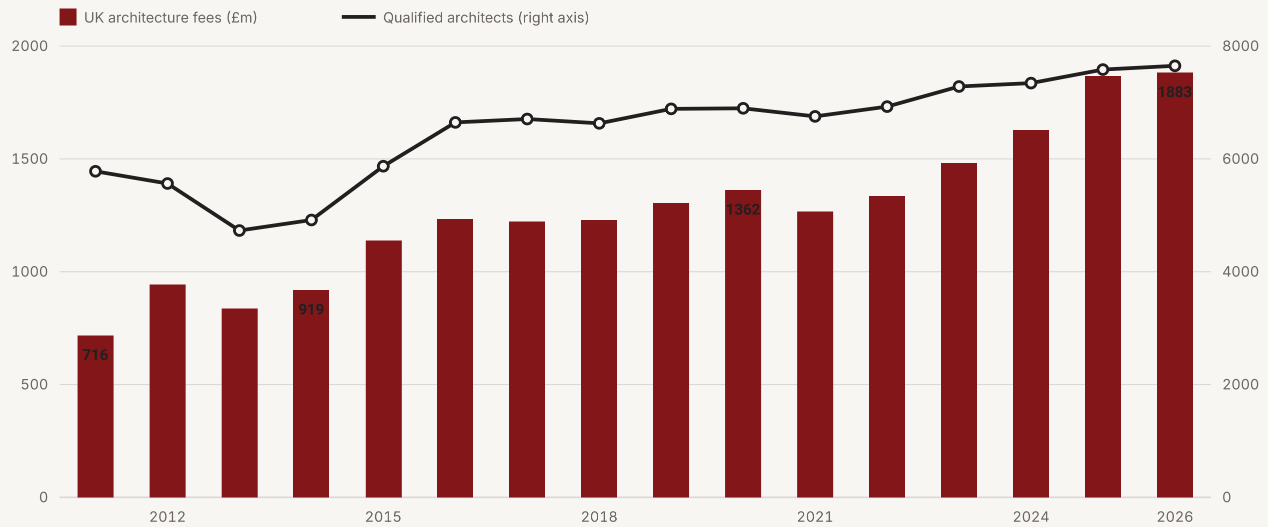
SECTION 01

A market that has doubled

In 2014, the UK's 100 largest architecture practices reported £919m in architecture fees earned by their UK offices, and by 2026 the same table reports £1.88bn.

The top of UK architecture has doubled in twelve years, and the climb has been remarkably steady: through Brexit, a pandemic and an inflation shock, the fee pool fell only twice, and shallowly both times.

Headcount has followed a very different path, growing by about a third over the full fifteen years, from 5,781 qualified architects to 7,649. The market has not doubled by employing twice as many architects; it has doubled by earning considerably more per person, which is the subject of Section 04.



UK architecture fees and qualified architects, top-100 practices, 2011–2026. Fee totals for 2011 to 2013 are understated, because several practices, including Foster + Partners in 2011, did not disclose UK fee income.

TABLE 1 · UK ARCHITECTURE FEES, TOP-100 PRACTICES

YEAR	TOTAL UK FEES (£M)	QUALIFIED ARCHITECTS	FEES PER ARCHITECT	TOP-10 FEE SHARE
2011	716*	5,781	£124,000*	21.6%*
2014	919	4,916	£187,000	34.7%
2017	1,222	6,705	£182,000	36.3%
2020	1,362	6,897	£197,000	38.7%
2023	1,482	7,284	£203,000	37.2%
2026	1,883	7,649	£246,000	43.3%

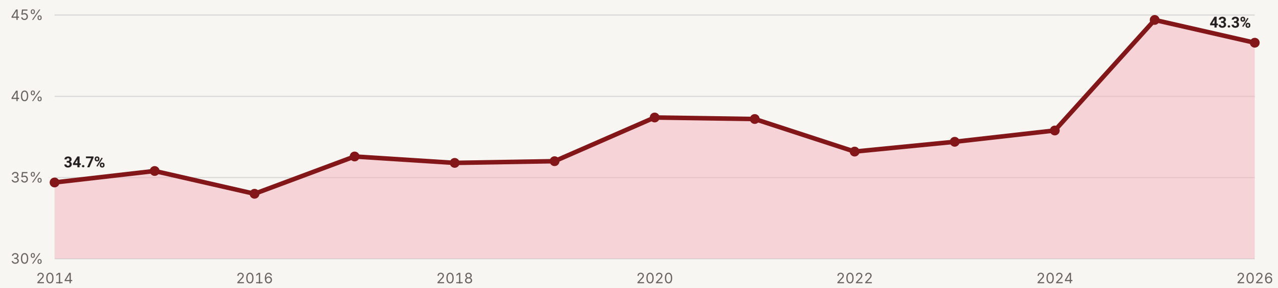
*2011 to 2013 totals are understated, so comparisons in this paper run from 2014, the first fully reported year.

SECTION 02

The pull to the top

Growth has not been evenly shared. In 2014 the ten largest practices took 35% of the fee pool; in 2026 they take 43%.

Put another way, the ten practices at the top of the table now earn more than the eighty ranked 21st to 100th combined, at £815m against £804m. This is not a single-year distortion, because the top-ten share has climbed in almost every year of the dataset, and each of the segments below it (ranks 11 to 20, 21 to 30 and beyond) has grown more slowly than the decile above it.



Share of all top-100 UK architecture fees earned by the ten largest practices, 2014–2026.

£815m

Earned by the ten largest practices in 2026

£804m

Earned by the eighty ranked 21st to 100th

SECTION 03

The international practice influence

The top of this table is increasingly shaped by practices whose work, and in several cases whose ownership, sits well beyond the UK. That shows up in two quite different ways: a UK-headquartered practice exporting at unprecedented scale, and a group of globally headquartered firms establishing themselves in the table for the first time.

A UK practice on a global scale

Foster + Partners remains in a category of its own, employing 711 qualified architects in the UK, more than double its nearest rival, and reporting £468m in UK architecture fees in 2026. That is roughly a quarter of the entire top-100 pool, and more than six times the next largest earner, ZHA, on £73m. The trajectory matters as much as the scale, in that the practice has grown from 290 qualified architects in 2014 to 711 today, and its UK fee income rose by £195m in the space of two years, from £273m in 2024 to £468m in 2026. No other practice in the dataset has ever added anything close to that.

What makes the Foster figure a story about international work rather than domestic demand is where the fees are earned and where they are booked. The step change is the Middle East, where an explosion of regional work over the past two years has flowed through a London-headquartered business at a scale no UK rival has matched, and it is that combination, UK-headquartered and globally delivered, that the survey records as UK fee income.

290 to 711
Foster + Partners qualified UK architects, 2014 to 2026

+£195m
Foster + Partners fee increase, 2024 to 2026

6×
The next largest UK fee earner

The global firms arriving in the table

The second movement is quieter and, for hiring, arguably more consequential. Gensler, the largest architecture practice in the world, had not appeared in this survey since 2012, when it ranked 76th on 30 qualified architects. It returned in 2025 at 14th, and in 2026 sits 11th with 131 qualified architects, 382 total UK staff and £32m in UK fees. That is a substantial London studio built on won work, and the pace of it is the point, with fees up 38% in a single cycle as the UK business takes on more of the major, technically complex commissions that draw on the firm's international sector expertise.

Gensler is not alone. AECOM entered the table in 2022 and now ranks 10th on 132 architects, Mott MacDonald first appeared in 2025 and has already reached 28th, and Ridge and Partners has climbed from 66th in 2022 to 27th today. Perkins&Will has been in the table since 2015 and has grown its UK fees from £4.7m to £21m. HOK, by contrast, has held a continuous UK presence since 2011 while running a smaller London studio of 27 qualified architects, which is a useful reminder that an international parent tells you very little on its own about the size or the strategy of the UK business.

Taken together, three of the eleven largest practices by architect numbers in 2026 are internationally headquartered, in AtkinsRéalis at 5th, AECOM at 10th and Gensler at 11th, and the practice at the top of the table now sits under external private capital. Each of them competes on a broader base than a traditional London studio, with a different pay reference point, the ability to move work between offices and an established international client list. For UK practices that is a widening of the competitive set, and for architects it is a genuine expansion of the kinds of career now available without leaving the country.

SECTION 04

The productivity puzzle

Fee income per qualified architect has doubled, from roughly £124,000 in 2011 to £246,000 in 2026. Before writing this paper we held two working hypotheses.

Either practices are wrapping more support around each architect, in the form of more delivery staff, more technology and more business services, or each head is genuinely earning more.

The data settles the first of those, because permanent support staff cannot account for it. The ratio of total UK staff to qualified architects has been flat for fifteen years, running at a median of roughly two staff per architect in 2011 and slightly under two today. Fee income per total staff member has doubled as well, so on the payroll at least the whole practice is earning more per person rather than the architects alone.

TABLE 2 · STAFFING LEVERAGE AND REVENUE PER HEAD

YEAR	STAFF PER ARCHITECT (MEDIAN)	FEES PER STAFF MEMBER	FEES PER ARCHITECT
2011	2.1	£56,000	£128,000
2017	2.0	£85,000	£181,000
2026	1.9	£114,000	£249,000

Pure-play practices only. Firms whose UK staff exceed six times their qualified architects are excluded to avoid distortion.

The explanation the data cannot see

There is a third possibility to which this dataset is blind. Outsourcing, whether offshore to overseas studios and production hubs or to subcontracted specialists and freelance resource in the UK, would raise fee income per qualified architect without ever appearing in these numbers. The survey counts only qualified architects and permanent UK staff, and contracted capacity falls into neither category.

A practice that moves technical production, BIM modelling or documentation offshore, or flexes through subcontractors at peak workload, will look leaner and more productive per head on this table while the work is in fact being done by more people than the table shows.

That makes the flat leverage ratio less conclusive than it first appears, since it rules out practices hiring more permanent support staff in the UK without ruling out their buying that capacity somewhere else.

Four candidate explanations therefore remain, and the published data cannot separate them: higher-value work, fee inflation, outsourced or offshore delivery, and people simply carrying more. The growth comfortably outpaces general inflation over the period, but only the people inside practices know how the balance falls between the rest.

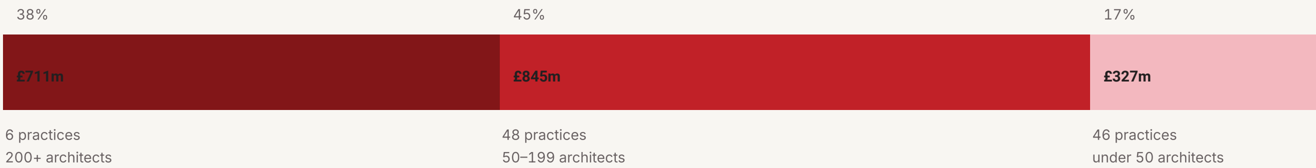
Where we think the answer lies

With productivity increasing significantly over the time frame, we are keen to explore the nature of that shift with practice leaders, and we expect the explanation to prove a combination of four things: greater overseas fee revenue attributed to UK businesses; work offshored or outsourced to international offices; improvements in technology; and greater investment in training and development across the industry. Each of those would move revenue per head in the same direction, but they carry very different consequences for how a UK studio is staffed and led, which is why we would rather hear it from the people running these practices than infer it from the table.

SECTION 05

The middle of the table

The 2026 table splits three ways, and the largest single slice of the market is the mid-tier, where most of the named, recognisable studios sit.



Where the £1,883m of 2026 UK architecture fees sits, by practice size.

Year to year the mid-tier looks stable, since roughly two-thirds of these practices are still in the band at the end of any given five-year window. Almost none of them break through it either, and across fifteen years we count only three practices that grew from the mid-tier past 200 architects.

Across the full decade, however, the picture shifts: of the 47 mid-tier practices of 2016, only 25 were still in the band by 2026, and the replacements are increasingly multidisciplinary consultancies and US-headquartered entrants. One caution applies here: several well-known names that appear to have left the table, among them Make, Squire & Partners and Stanton Williams, most likely stopped submitting survey data rather than shrinking.

SECTION 06

Where the growth has landed

Rank movements tell you about position, while fee movements tell you about money, and measured on revenue the last decade has delivered substantial fee growth across the upper half of the table.

BIGGEST GAINERS change in UK architecture fees, 2016 to 2026

Growth in architecture fees paid to UK offices, 2016–2026, for the ten practices that added the most. Foster + Partners sets the scale, at £297m against £12m to £48m for the nine below it.

TABLE 3 · BIGGEST REVENUE GAINERS, 2016 TO 2026

PRACTICE	2016 £M	2026 £M	CHANGE £M	CHANGE %
Foster + Partners	171.0	468.1	+297.1	+174%
Populous	17.7	66.1	**+48.4**	+273%
ZHA	45.3	72.6	**+27.2**	+60%
tp bennett	25.9	51.9	**+26.0**	+100%
Corstorphine & Wright	6.4	27.7	**+21.3**	+333%
Ryder Architecture	12.9	32.5	**+19.7**	+153%
Perkins&Will	4.7	21.0	**+16.3**	+343%
Sheppard Robson	21.9	37.5	**+15.6**	+71%
BDP	36.3	51.7	**+15.3**	+42%
Allford Hall Monaghan Morris	28.4	40.6	**+12.3**	+43%

The table covers the 65 practices present in the top 100 in both 2016 and 2026. Practices absent from the table in either year, Gensler among them, cannot be measured on this basis and are therefore excluded; that is a limitation of the comparison rather than a comment on their growth.

The practices behind the numbers

Below Foster + Partners, four names deserve more than a row in a table, because each of them has grown in a materially different way and each implies a different kind of hiring.

Populous

SPECIALIST PRICING POWER

£17.7m → £66.1m	**56th → 25th**	**£760k**
UK FEES, 2016 TO 2026	RANK BY ARCHITECTS	FEES PER ARCHITECT

Populous added £48.4m on a qualified headcount that rose only from 45 to 87. That works out at roughly £760,000 of UK fee income per qualified architect, more than three times the market average of £246,000, which is what a genuinely specialist position looks like in this dataset: a narrow sector, very few credible competitors and pricing power to match.

tp bennett

VALUE, NOT VOLUME

£25.9m → £51.9m	**19th**	**£509k**
UK FEES, 2016 TO 2026	RANK BY ARCHITECTS	FEES PER ARCHITECT

tp bennett doubled its UK fees while adding fewer than ten qualified architects. It now earns more in UK architecture fees than every practice in the country except Foster + Partners and ZHA, despite sitting 19th on architect numbers. This is the clearest example in the table of value growth rather than volume growth.

Corstorphine & Wright

SCALE AND REACH

£6.4m → £27.7m	**72nd → 13th**	**£220k**
UK FEES, +333%	RANK BY ARCHITECTS	FEES PER ARCHITECT

Corstorphine & Wright grew the other way. Qualified architects rose from 35 to 126 over the same period, and at roughly £220,000 per architect the practice earns a little under the market average, so the growth is a scale story: more people, more offices, more sectors, delivered at conventional rates.

Gensler ORGANIC MOMENTUM

£23.3m → £32.0m
UK FEES, +38% IN ONE CYCLE

14th → 11th
RANK BY ARCHITECTS

111 → 131
QUALIFIED ARCHITECTS

Gensler cannot be measured across the full decade, because it was absent from the table between 2013 and 2024, and that gap understates rather than overstates what the practice has built. Fees are growing roughly twice as fast as headcount, which is the signature of a studio winning larger and better-quality work rather than simply adding people, and the growth is organic: commissions won and delivered, with hiring following the workload rather than leading it.

Behind the UK business sits the largest architecture practice in the world, a global client base and delivery experience on schemes of a scale few UK studios encounter, and those international credentials are increasingly what clients on major, complex projects are buying. Of the practices to have entered this table in the current decade, Gensler has the clearest momentum.

Reading the movements

Two features of these movements deserve attention. The first is how concentrated the growth is, in that the largest riser added £297m over the decade while the next nine added between £12m and £48m each, so growth at the top of this market arrives in step changes rather than increments. The second is a caution about reading the table in the other direction, because a lower UK fee figure very often reflects where work is booked rather than whether it was won: Broadway Malyan's UK fee base fell by 77% because work moved to its overseas offices, while the work itself continued. This is a record of fees booked to UK offices, which is a narrower thing than a measure of how a practice is performing.

Just as telling are the names that were not in the table at all in 2016 and now sit in the 2026 top 30: AECOM (10th), Gensler (11th), Pascall+Watson (22nd), Ridge and Partners (27th) and Mott MacDonald (28th). As Section 03 sets out, two of those are American, while Mott MacDonald and Ridge are multidisciplinary consultancies rather than studios, and Ridge is backed by private equity, as is Foster + Partners at the very top of the table. On the evidence of the last decade, the routes into the upper half of this table have widened considerably, and a balance sheet, a sector specialism or an international platform now each open a way in alongside the traditional route of building a London studio year by year.

SECTION 07

The practices that held steady

The most quietly revealing group in this dataset is not the risers but the practices whose scale has barely changed, in a market that doubled around them.

The table below shows long-standing names, each present in at least 13 of the 16 annual surveys, whose qualified architect headcount changed by 15% or less between 2011 and 2026. Surviving fifteen years at consistent scale, through Brexit, a pandemic and an inflation shock, is an achievement in itself; what the data cannot tell us is how much of that consistency was designed.

TABLE 5 · PRACTICES WITH BROADLY UNCHANGED HEADCOUNT, 2011 TO 2026

PRACTICE	ARCH. 2011	ARCH. 2026	ARCH. Δ	FEES 2011	FEES 2026	FEES Δ
Jestico + Whiles	46	43	−7%	6.9	7.3	+6%
Rolfe Judd Architecture	36	32	−11%	5.5	5.8	+7%
BDP	295	261	−12%	45.8	51.7	+13%
Keppie Design	56	51	−9%	5.8	8.4	+45%
Chetwoods	42	38	−10%	4.4	6.2	+40%
Jacobs	58	64	+10%	6.0	16.5	+176%
JTP	31	35	+13%	4.1	9.6	+137%
AtkinsRéalis	241	211	−12%	n/a	40.4	n/a

Fees are shown in £m and cover architecture fees paid to UK offices. Highlighted rows are static on fee income as well as on headcount. AtkinsRéalis did not disclose UK fee income in 2011.

The three highlighted practices are the striking ones, holding both headcount and nominal fees remarkably steady across fifteen years. Set against cumulative inflation over that period, nominal growth of 6 to 13% represents a real-terms reduction of roughly a third in the value of those fees, and a smaller share of a market that has doubled. These are strong, well-regarded studios with long client relationships and consistent output, and holding scale deliberately is a legitimate strategy rather than the absence of one, since some of the best-known names in British architecture have built their reputations on exactly that. The question the data raises is not whether these are good businesses, which they plainly are, but whether the position was chosen, and that is one we put to practice leaders in the consultation that follows.

BDP was the largest practice in the UK in 2011 and remains one of the four largest today, having added more than £15m in UK fees since 2016.

BDP appears in both Table 3 and Table 5 for a reason worth noting: its fees dipped to £36m by 2016 and have recovered strongly since, which places it among the decade's ten biggest risers while looking flat when measured across the full fifteen-year window. The recovery is the more recent, and for anyone reading the market today the more relevant, half of that picture.

The remaining practices in the table tell the productivity story from Section 04 in miniature. Jacobs and JTP hold roughly the same number of architects as they did in 2011 while earning 176% and 137% more. This dataset cannot say whether that reflects pricing, project mix, or delivery moving off the permanent payroll, but it is the clearest illustration available of revenue growth decoupling entirely from headcount growth.

SECTION 08

What this means for talent

Five consequences follow from the data above, and each of them is already visible in the conversations we are having with practice leaders.

01 **Hiring power is concentrating.** The largest practices can bid harder, train more and market more heavily than most of the field, and they are investing in development at a level the mid-tier will find hard to match. Practices below the top ten compete very effectively on other ground, but doing so needs a sharper and more honest employee proposition than “we’re a great studio.”

02 **The pay structure will not hold forever.** Banding has been resilient through a decade of consolidation, but resilience is not the same thing as permanence, and the first cracks are likely to appear where scarce skills meet the deepest pockets: computational design, sustainability leadership and Middle East delivery experience.

03 **Every hire now carries roughly £250,000 of fee expectation.** Revenue per head has doubled, which means the cost of a mis-hire has doubled with it, and the case for precision in senior hiring rather than volume in pipelines has never been stronger.

04 **If delivery is moving offshore, the UK job changes shape.** Where production and documentation sit with offshore teams or subcontractors, the UK role shifts towards design leadership, client management and quality control of work done elsewhere. That is a different hire, and it is a narrower route in for early-career architects, with consequences for the profession’s pipeline that will not show up in these tables for years.

05 **Ownership is changing, and career maths with it.** Private capital behind Foster + Partners and Ridge introduces equity events, faster consolidation and new questions into every senior conversation, so practices competing for leaders will increasingly find themselves negotiating against balance sheets rather than salaries alone.

THE NEXT PAPER

Six questions we cannot answer from data

Everything above is drawn from published data, which describes what has happened to this market with reasonable confidence while explaining almost none of it.

The more interesting questions can only be answered by the people running these practices: why salary bands have held through a decade of consolidation, how much delivery has quietly moved offshore, and whether standing still was a decision or a drift. The second half of this research is therefore a consultation.

IN CONFIDENCE

Responses are aggregated and anonymised, with no practice named and nothing attributed without your written permission.

TEN MINUTES

Six questions, each with the finding behind it. Answer any or all of them, since even two lines against a single question is useful.

YOU SEE IT FIRST

Everyone who contributes receives the follow-up paper before it is published.

Request the consultation document

A companion document, **Research Brief and Consultation Questions**, sets out the six questions drawn from the findings in this paper. Write to us if you would like to take part, or if you would rather pass the questions to someone better placed to answer them, and we will send it over.

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Methodology and notes

- Source: published AJ100 survey data (The Architects' Journal), 2011–2026, compiled and analysed by Arcavia Consulting. Practices are ranked by qualified architects employed in the UK.
- Revenue throughout means architecture fees paid to UK offices unless stated otherwise, and fees earned by overseas offices are excluded.
- 2011–2013 fee totals are understated: several practices, including Foster + Partners in 2011, did not disclose UK fee income, so trend comparisons in this paper run from 2014 onwards.
- The survey captures qualified architects and permanent UK staff only. Work performed by overseas offices, subcontractors, agency or freelance resource is not counted, and any shift towards it will inflate the per-head productivity figures in Section 04.
- "Pure-play" analyses exclude practices whose total UK staff exceed six times their qualified architects, to prevent multidisciplinary consultancies distorting per-head figures.
- Revenue movement tables cover only practices appearing in the top 100 in both 2016 and 2026. Departure from the table may reflect non-participation in the survey rather than decline.
- Analysis by Arcavia Consulting, July 2026; any errors and all interpretations are our own.

Arcavia Consulting

ABOUT US

The hires that move the business

Arcavia Consulting is a specialist talent partner to the design and construction market across the UK, Europe and the United States, covering design and strategic leadership, project and delivery, commercial, work-winning and planning. We are a search business rather than a database business: every mandate is run exclusively, with a named partner on the work from briefing through to placement, working as an extension of our clients' own teams rather than as one supplier among several.

HOW WE WORK

EXCLUSIVE AND EMBEDDED

One search partner per mandate, inside your process and your timetable, with full visibility of who we approached and why they said no as well as yes.

MAPPED, NOT LISTED

Every search opens with a map of the market, not a shortlist pulled from a database, which is why research of this kind is part of the day job.

BEYOND THE PLACEMENT

Salary benchmarking, competitor and team mapping, pipelines built ahead of funded roles, and straight counsel on when not to hire.

Planning a senior appointment? Let's talk.

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