



ARCHITECTS' COUNCIL OF EUROPE  
CONSEIL DES ARCHITECTES D'EUROPE

**June 2010**

**Sixth Snapshot Survey  
Of  
Impact of Economic Crisis**

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## Methodology:

- Secretariat Used the Same Questions as Used in Previous Surveys and the ACE Internet Service Provider Created the Online Questionnaire
- Questions Translated into 17 Languages
- E-mail Invitation sent to 4,795 E-mail Addresses
- Member Organisations Invited to Circulate the Invitation to all Architect Members
- Questionnaire Open for a 2 Week Period (Ended on the 27<sup>th</sup> of June 2009)
- **3,363** Responses from ACE Member Countries
- All results are weighted to give more Statistical Reliability

# Sixth Economic Impact Survey

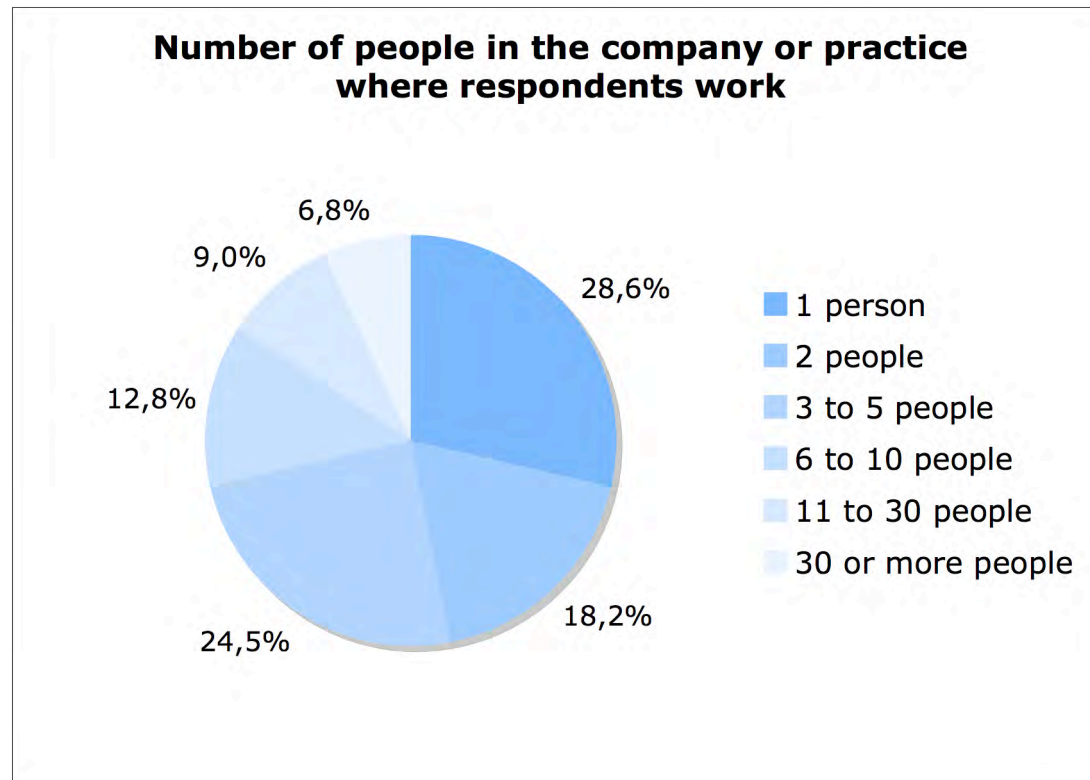
# June 2010

## Breakdown of Responses:

Country	Answers in April 2009	Answers in June 2009	Answers in September 2009	Answer in December 2009	Answer in March 2010	Answer in June 2010
France	17	1736	1508	1652	1374	1058
Irlande	13	91	354	14	21	216
Romania	36	315	296	210	198	210
Germany	75	127	208	87	112	429
Bulgaria	0	17	170	96	105	75
Greece	235	216	162	180	281	225
Czech Republic	128	55	151	67	57	134
Turkey	37	130	147	123	203	128
Poland	12	18	54	53	59	35
United Kingdom	21	27	32	22	27	34
Belgium	995	630	31	39	443	336
Finland	210	32	30	17	5	12
Austria	18	7	24	19	18	4
Croatia	0	126	24	5	5	251
Spain	1	21	18	600	678	12
Portugal	17	75	17	80	14	10
Sweden	17	51	16	12	14	13

Country	Answers in April 2009	Answers in June 2009	Answers in September 2009	Answer in December 2009	Answer in March 2010	Answers in June 2010
Denmark	13	92	13	14	7	23
Latvia	25	22	12	22	1	12
Malta	33	13	11	15	3	21
Slovenia	9	9	11	92	61	4
Netherlands	10	7	9	14	10	36
Italy	1	83	8	39	13	16
Switzerland	1	6	7	3	3	6
Hungary	0	121	5	0	3	2
Luxembourg	11	12	5	9	6	5
Cyprus	3	3	0	0	1	4
Estonia	25	23	0	39	26	17
FYROM	1	0	0	3	2	1
Lithuania	0	37	0	35	2	33
Norway	83	2	0	2	1	0
Slovakia	0	0	0	28	0	1
Bosnia & Herzegovina	0	2	0	0	0	1
<b>TOTAL</b>	<b>2047</b>	<b>4106</b>	<b>3323</b>	<b>3591</b>	<b>3753</b>	<b>3363</b>

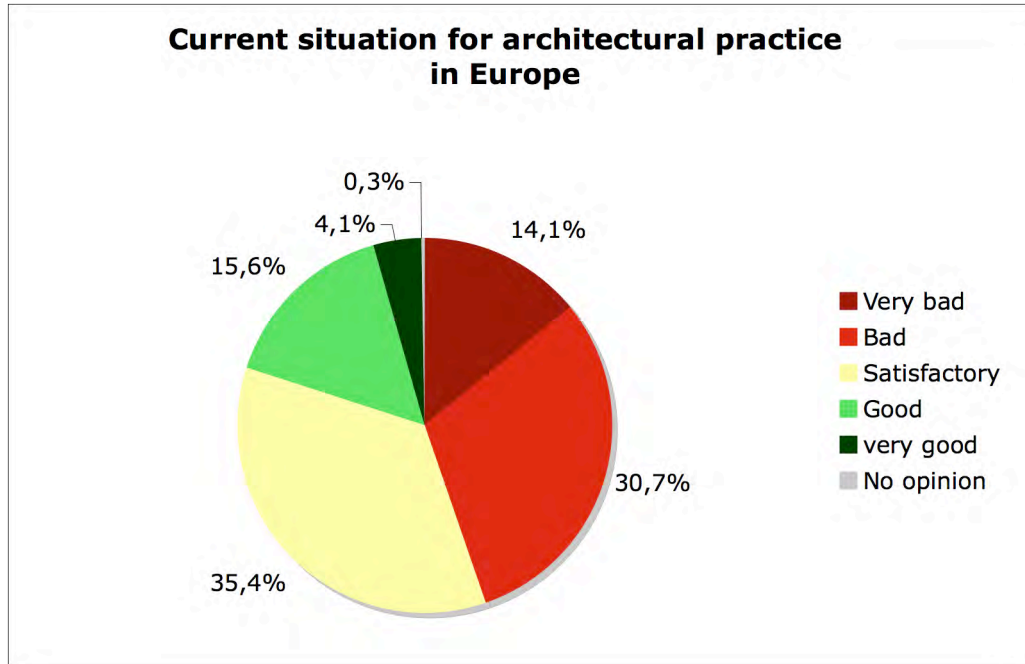
## Profile of Respondents:



**Good Representation  
from all sizes of  
Architectural Practice**

**Spread Reflects  
Sector Study Profile  
well**

**No Other Information  
About Respondents  
was Sought**

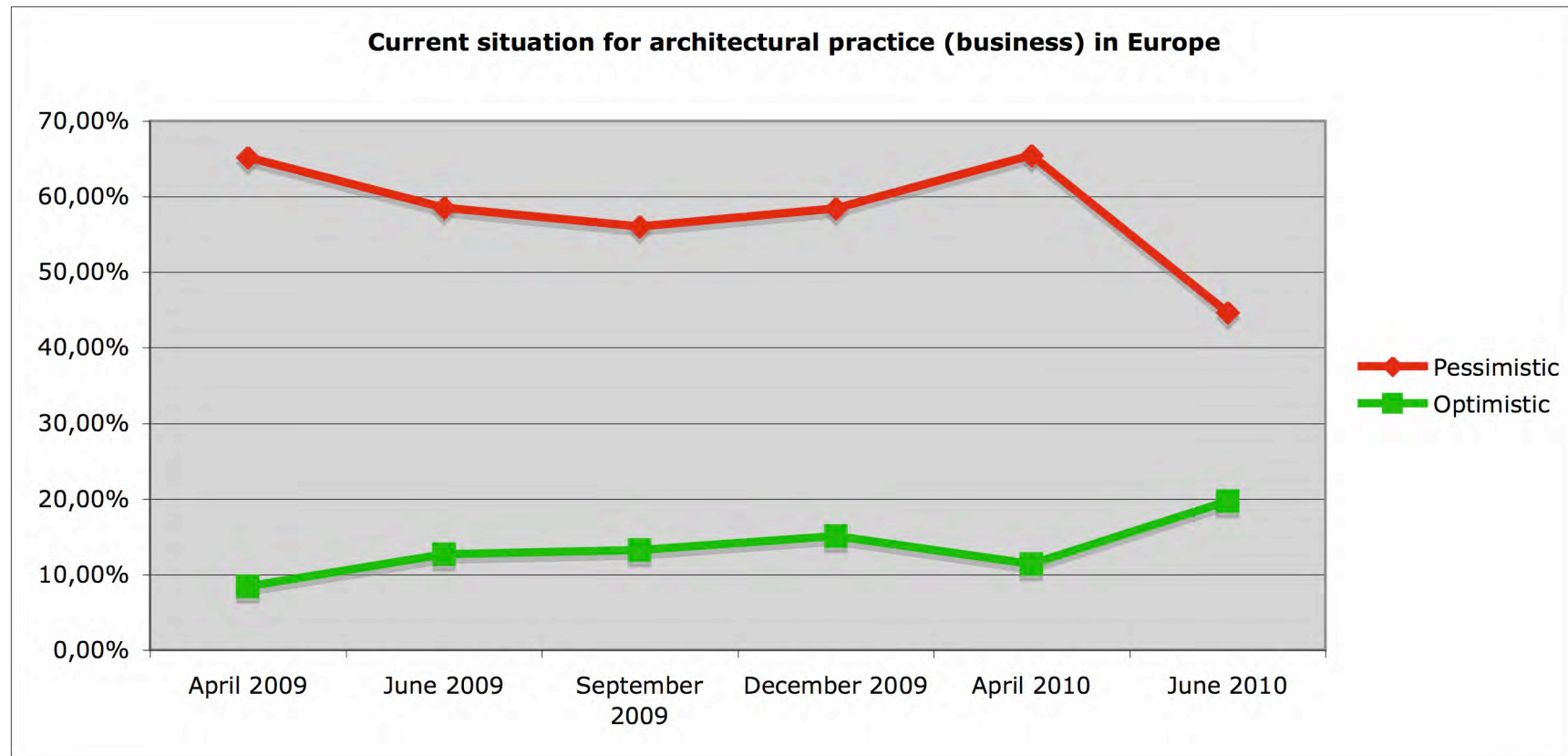


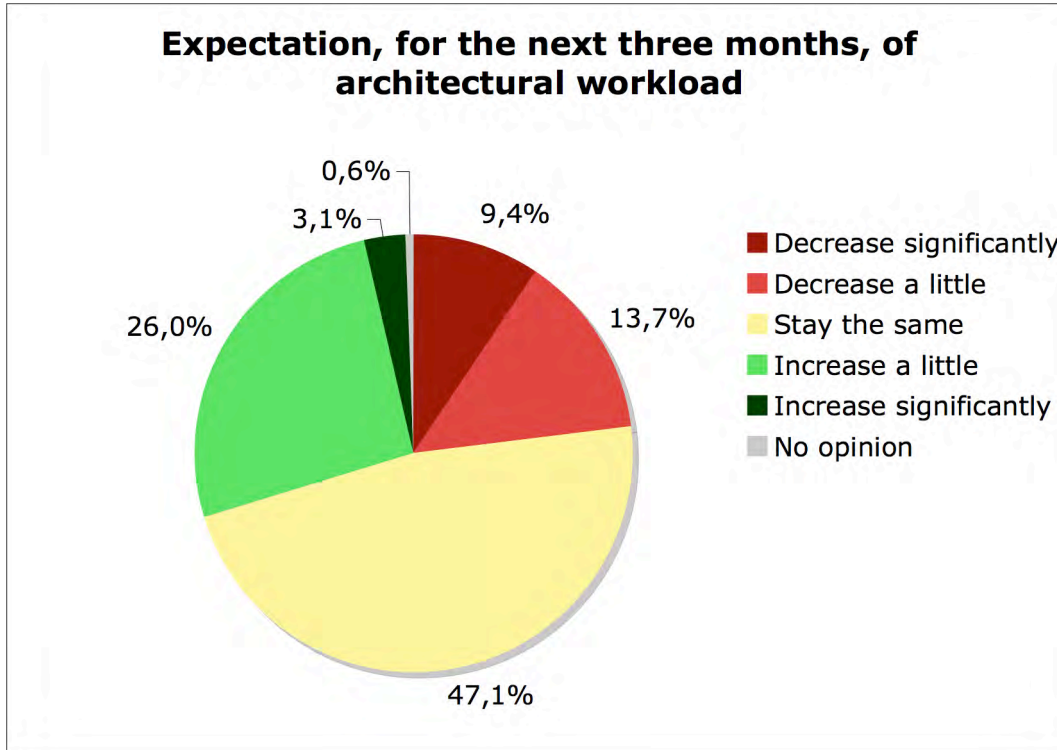
**Level of Optimism has increased and is the highest since the beginning of the crisis even if there is still 44,70 % of pessimist**

	<b>Pessimistic</b>	<b>Optimistic</b>
April 2009	65,16%	8,41%
June 2009	58,55%	12,67%
September 2009	56,03%	13,21%
December 2009	58,40%	15,10%
April 2010	65,50%	11,40%
June 2010	44,70%	19,70%

**Survey to be Repeated Throughout 2010 to Extend Trend Analysis**

## Current Situation for Architectural Practice in Europe





**Breakdown by Building Type Comes Later in the Presentation**

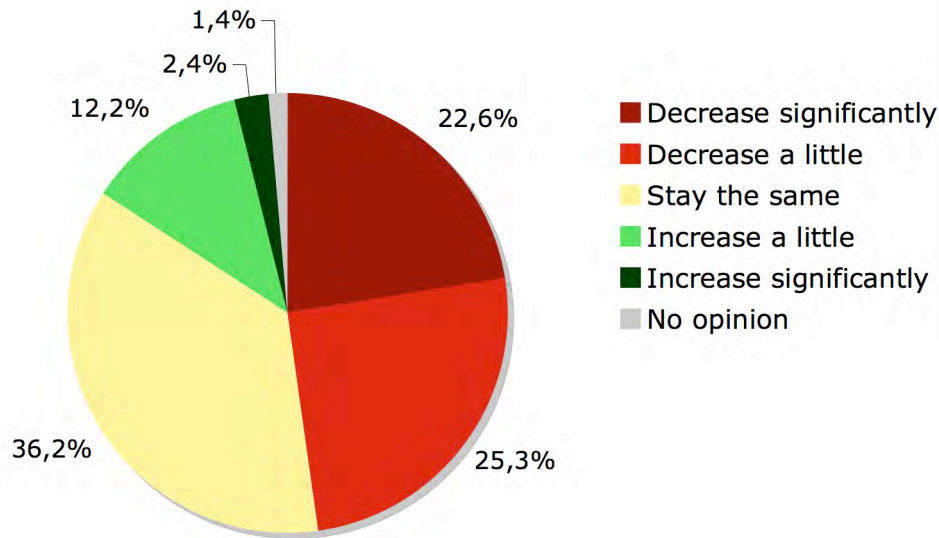
**Expectations for an Increase have fallen despite the high expectations in April**

	<b>Decrease</b>	<b>increase</b>
April 2009	48,47%	13,09%
June 2009	39,60%	20,11%
September 2009	32,30%	24,49%
December 2009	32,80%	22,40%
April 2010	21,10%	46,10%
June 2010	23,20%	29,20%

## Expectation, for the next three months, of Architecture Workload



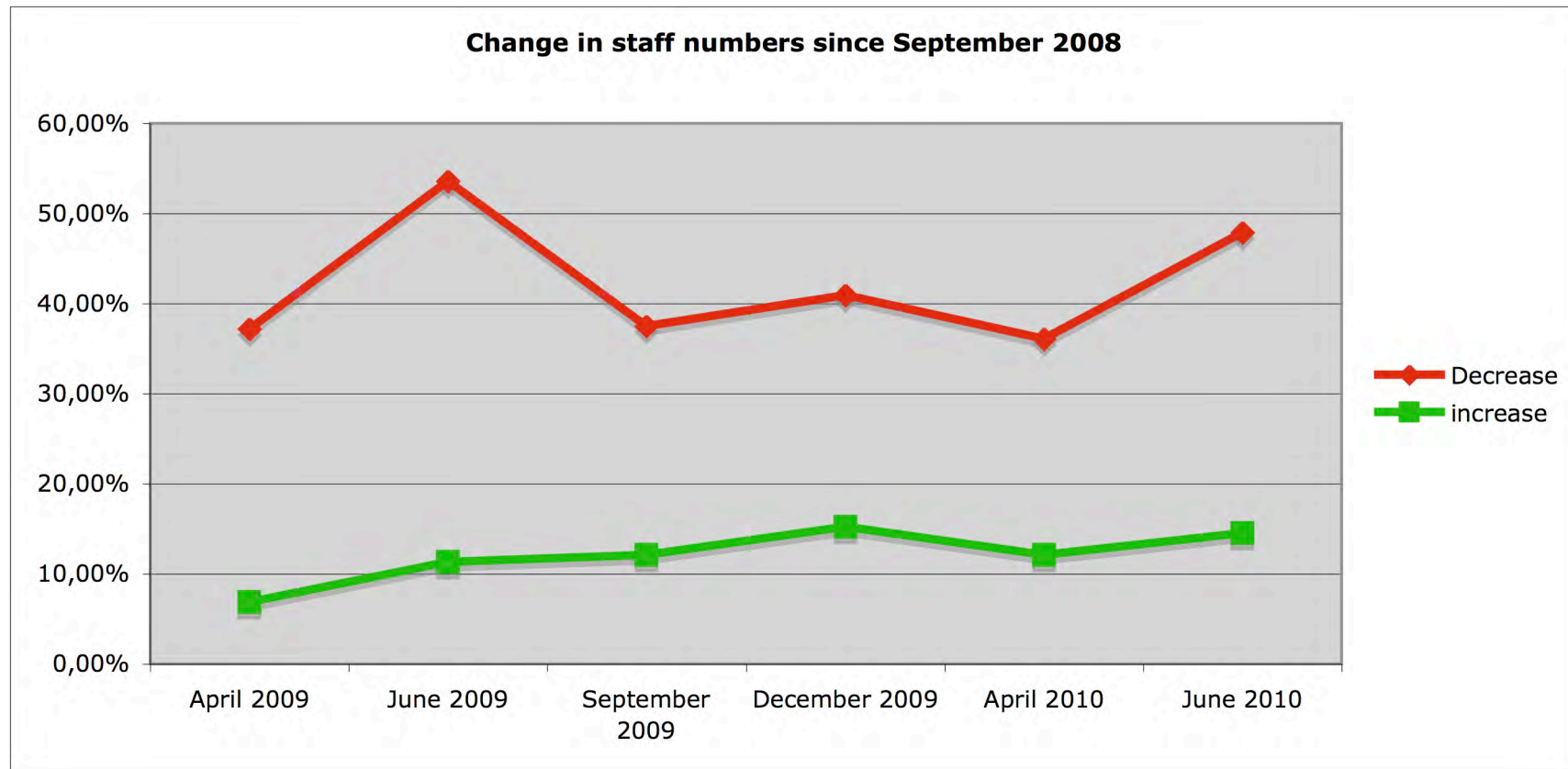
**Change in staff numbers since September 2008**

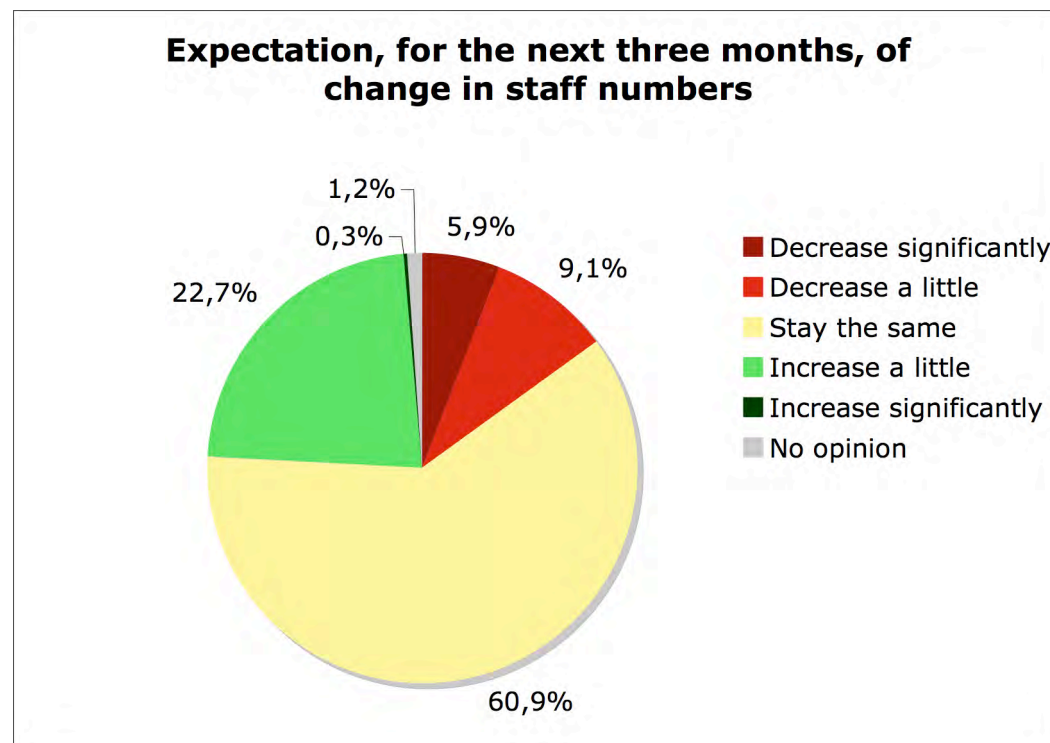


This result indicates that 1 in 3 offices have seen a decrease in staff numbers since the start of the crisis

	<b>Decrease</b>	<b>increase</b>
April 2009	37,18%	6,85%
June 2009	53,60%	11,36%
September 2009	37,49%	12,12%
December 2009	40,90%	15,20%
April 2010	36,10%	12,10%
June 2010	47,90%	14,50%

## Change in Staff Numbers since September 2008

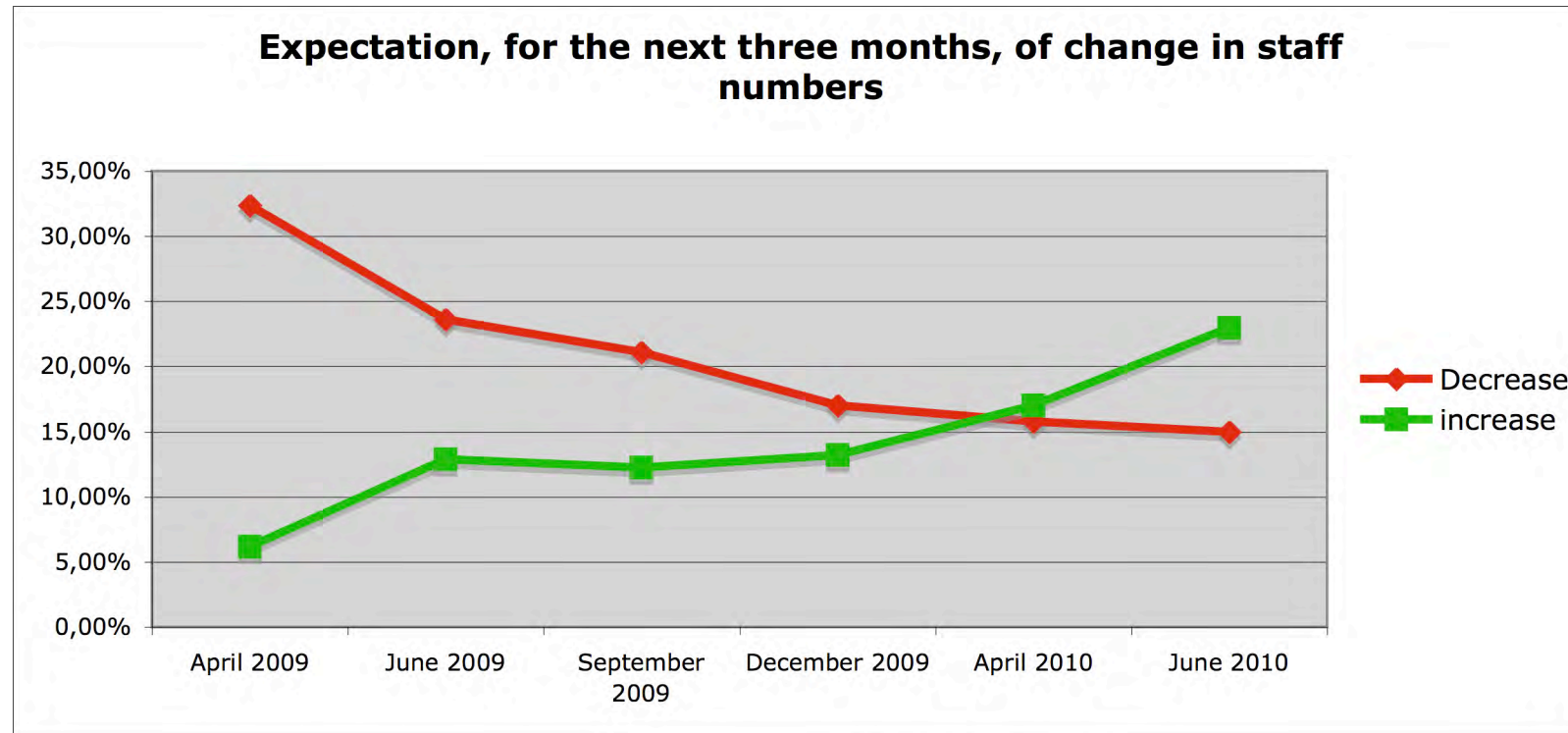




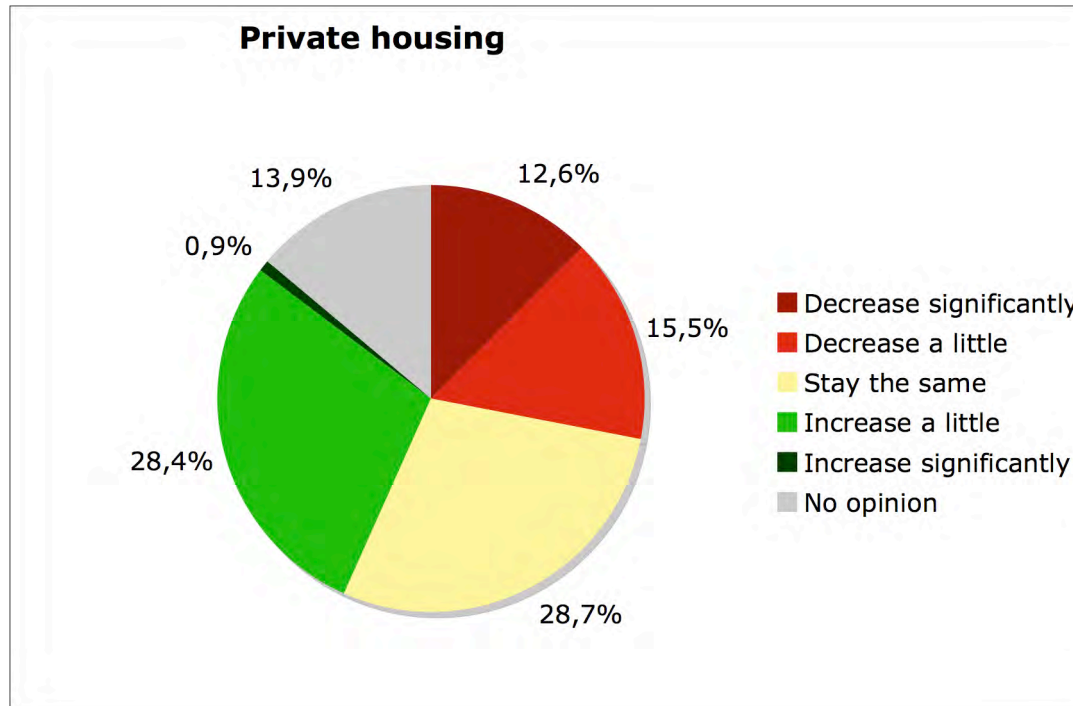
**For the second time we see that the number of offices expecting to see an increase in staff numbers is greater than the number expecting a decrease.**

	<b>Decrease</b>	<b>increase</b>
April 2009	32,35%	6,15%
June 2009	23,60%	12,90%
September 2009	21,07%	12,25%
December 2009	17,00%	13,20%
April 2010	15,80%	17,00%
June 2010	15,00%	23,00%

## Expectation, for the next three months, of Change in Staff Numbers



## Expected Change in Workload Over Next 3 Months: Private Housing

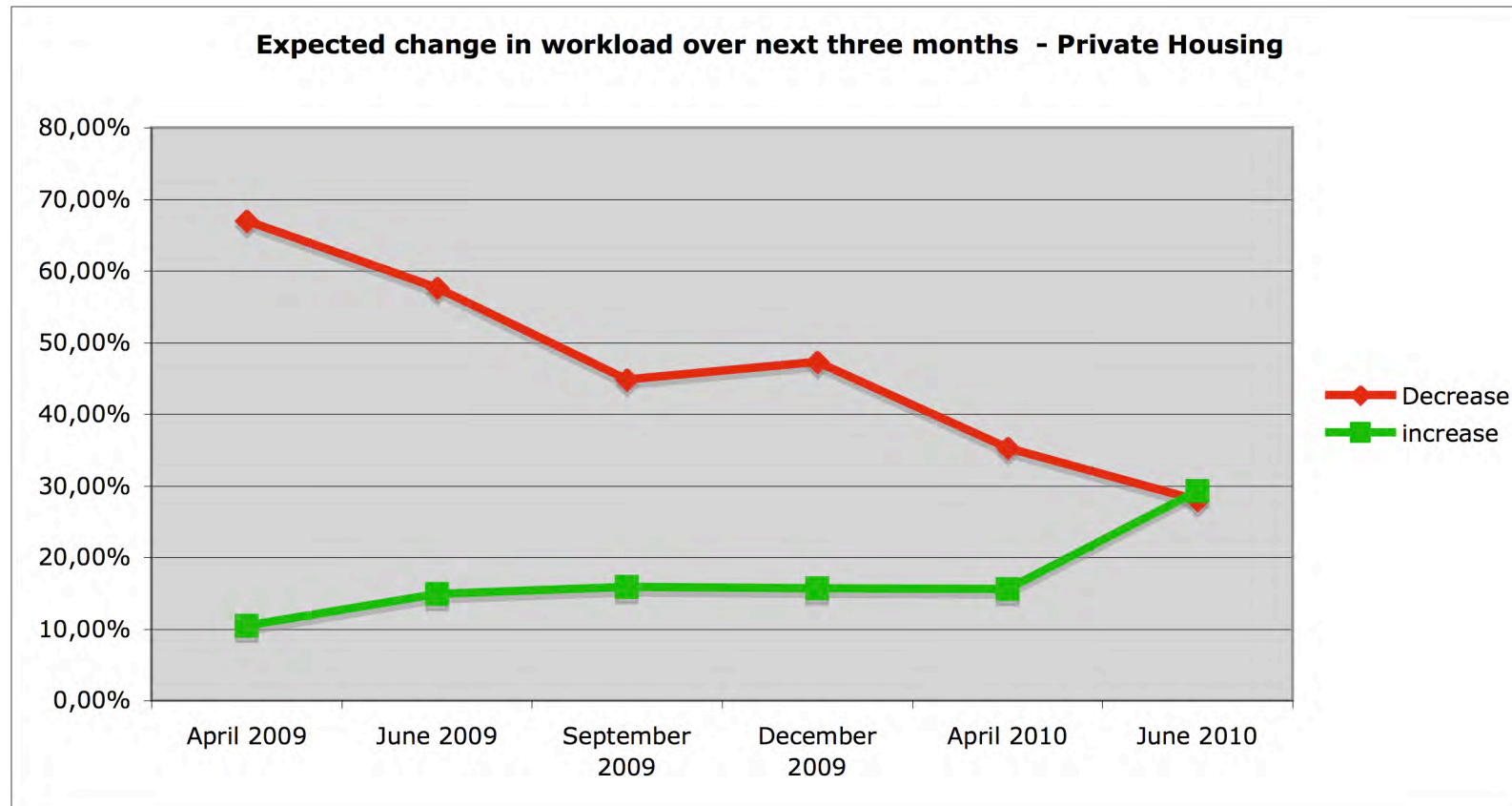


Readers are reminded that “private housing” accounts for 45% of the market for architects in Europe

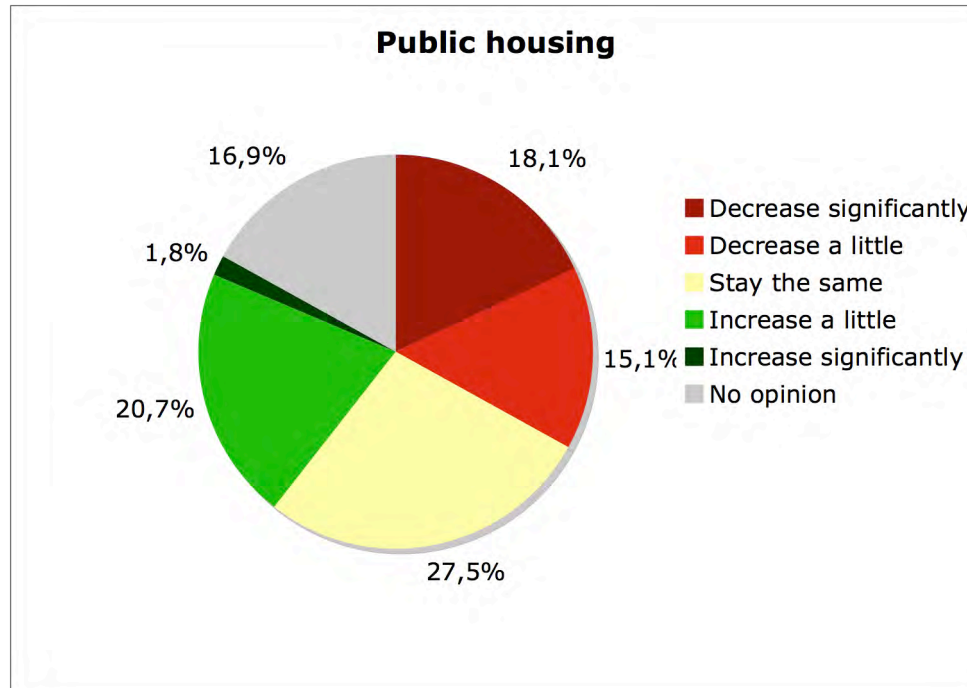
It is the first time we see that the number of architects expecting to see an increase in workload for private housing is greater than the number expecting a decrease

	Decrease	increase
April 2009	67,04%	10,44%
June 2009	57,60%	14,87%
September 2009	44,84%	15,88%
December 2009	47,30%	15,70%
April 2010	35,30%	15,60%
June 2010	28,00%	29,30%

## Expected Change in Workload Over Next 3 Months: Private Housing



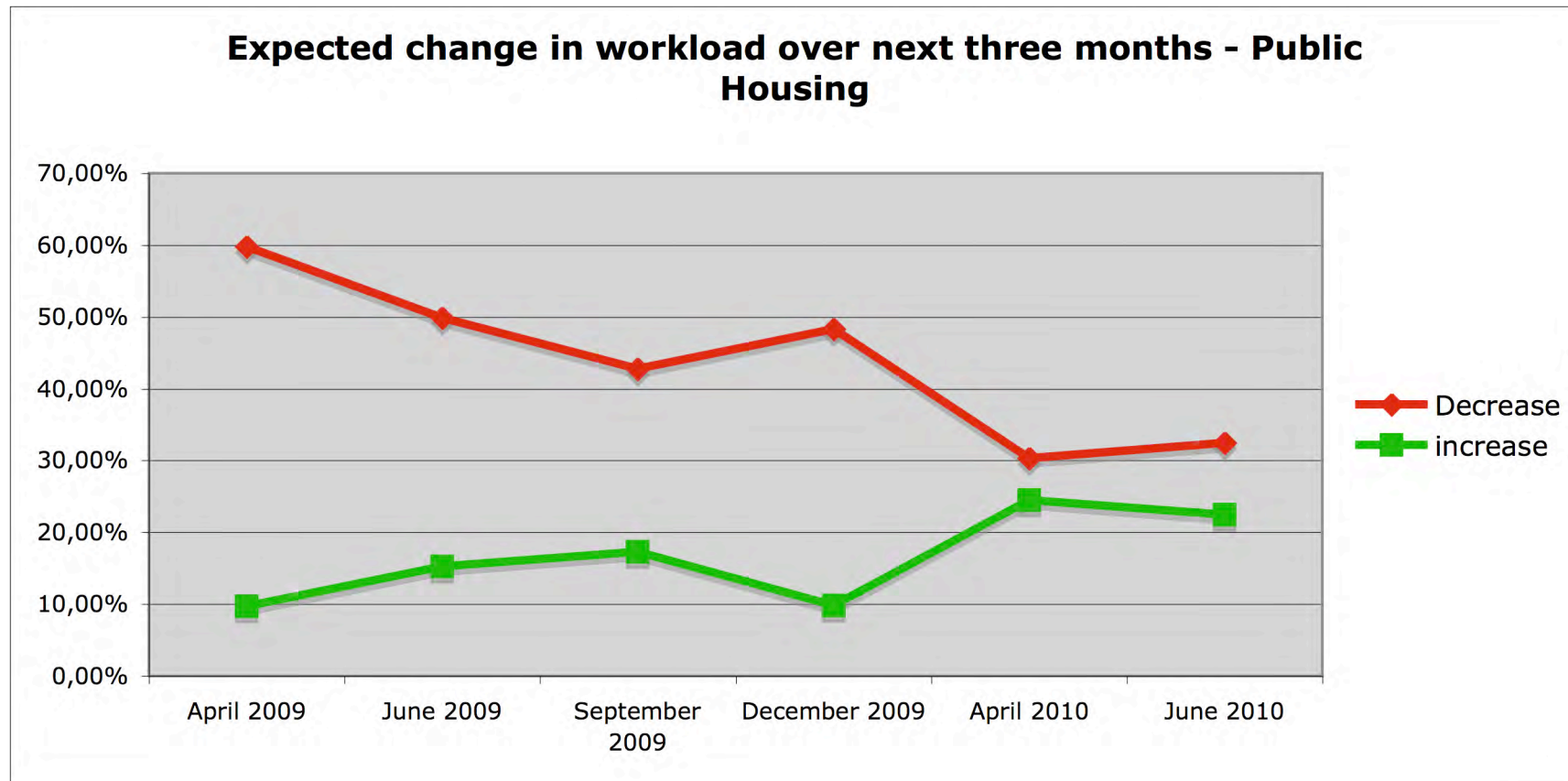
## Expected Change in Workload Over Next 3 Months: Public Housing



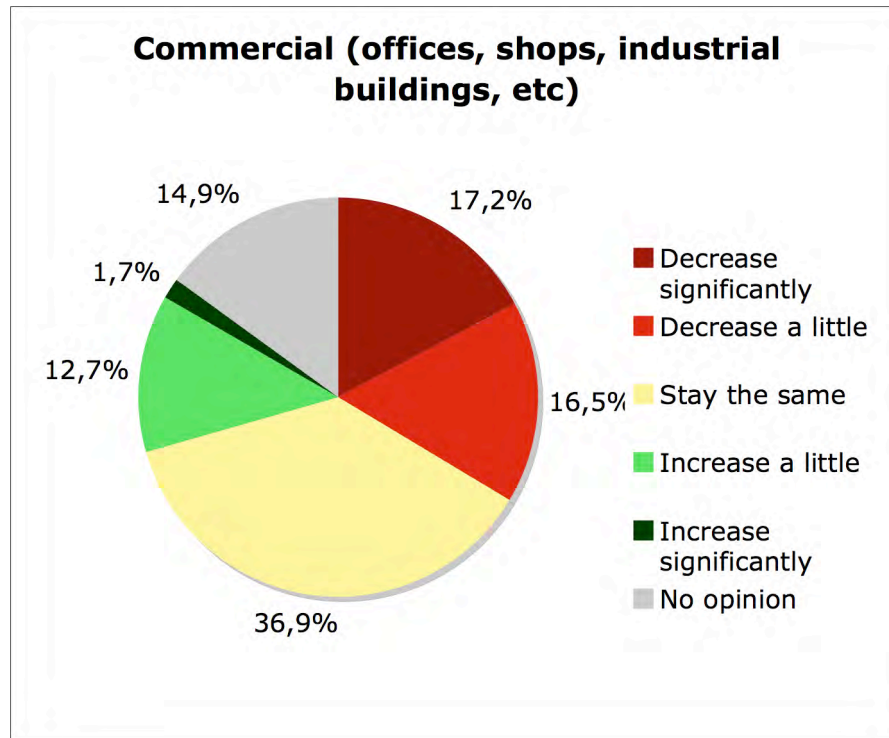
Readers are reminded that “public housing” accounts for 4% of the market for architects in Europe

	Decrease	increase
April 2009	59,78%	9,73%
June 2009	49,90%	15,31%
September 2009	42,75%	17,31%
December 2009	48,30%	9,80%
April 2010	30,30%	24,50%
June 2010	32,50%	22,50%

## Expected Change in Workload Over Next 3 Months: Public Housing



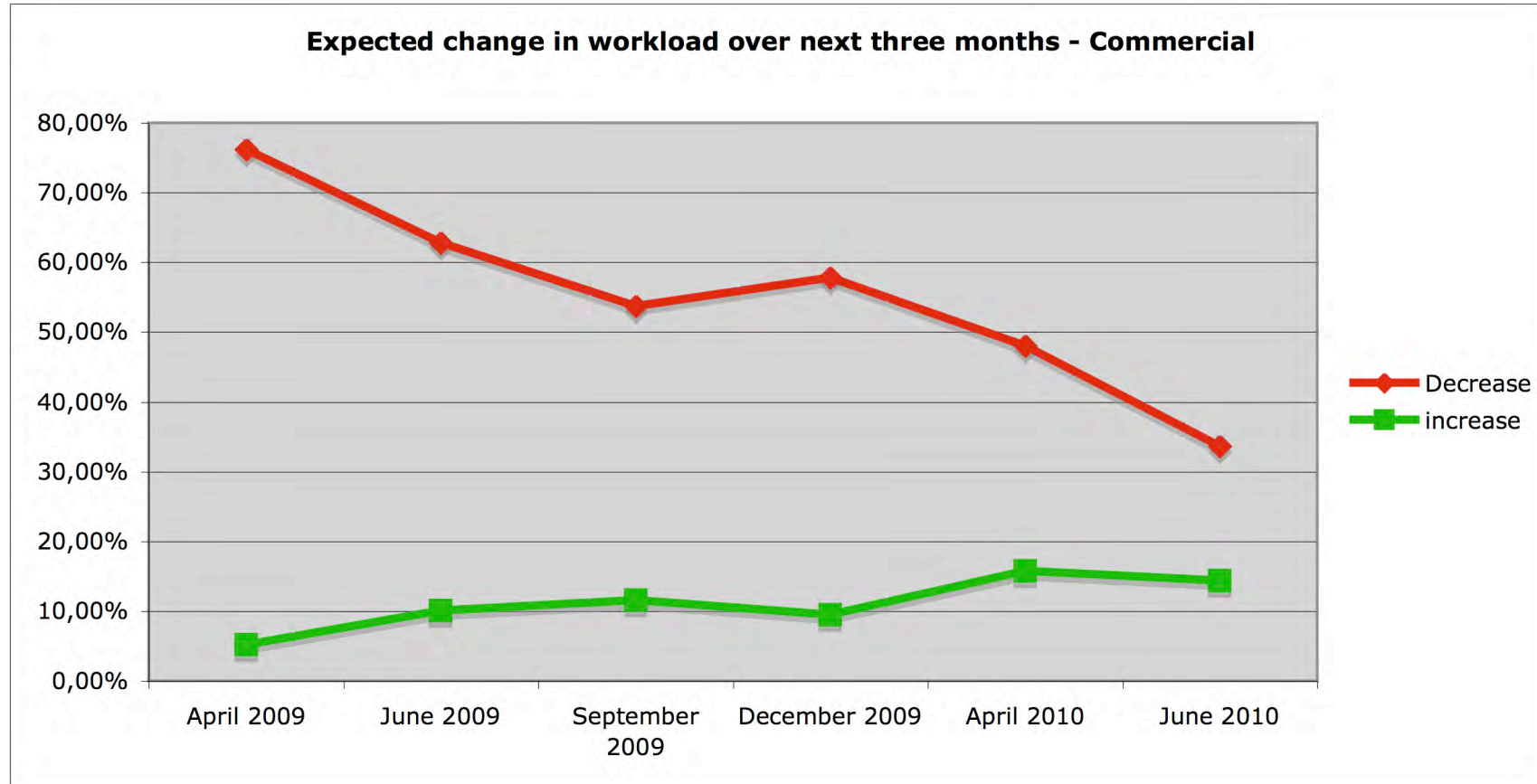
## Expected Change in Workload Over Next 3 Months: Commercial



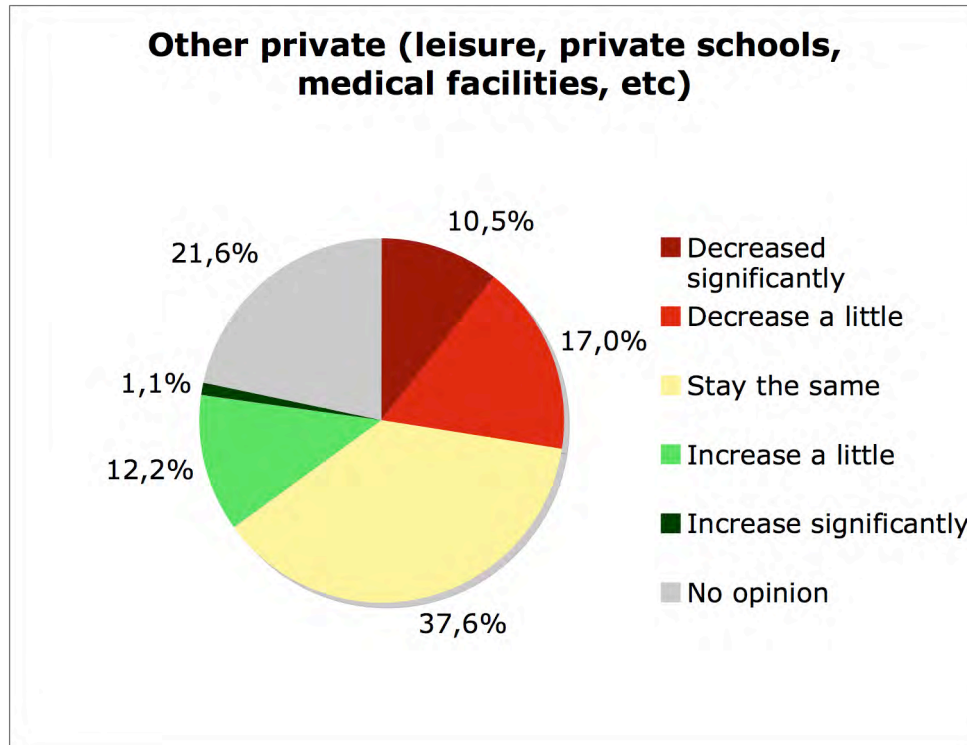
Readers are reminded that “commercial” projects account for 23% of the market for architects in Europe

	Decrease	increase
April 2009	76,19%	5,18%
June 2009	62,87%	10,08%
September 2009	53,71%	11,56%
December 2009	57,80%	9,50%
April 2010	48,00%	15,80%
June 2010	33,70%	14,40%

## Expected Change in Workload Over Next 3 Months: Commercial



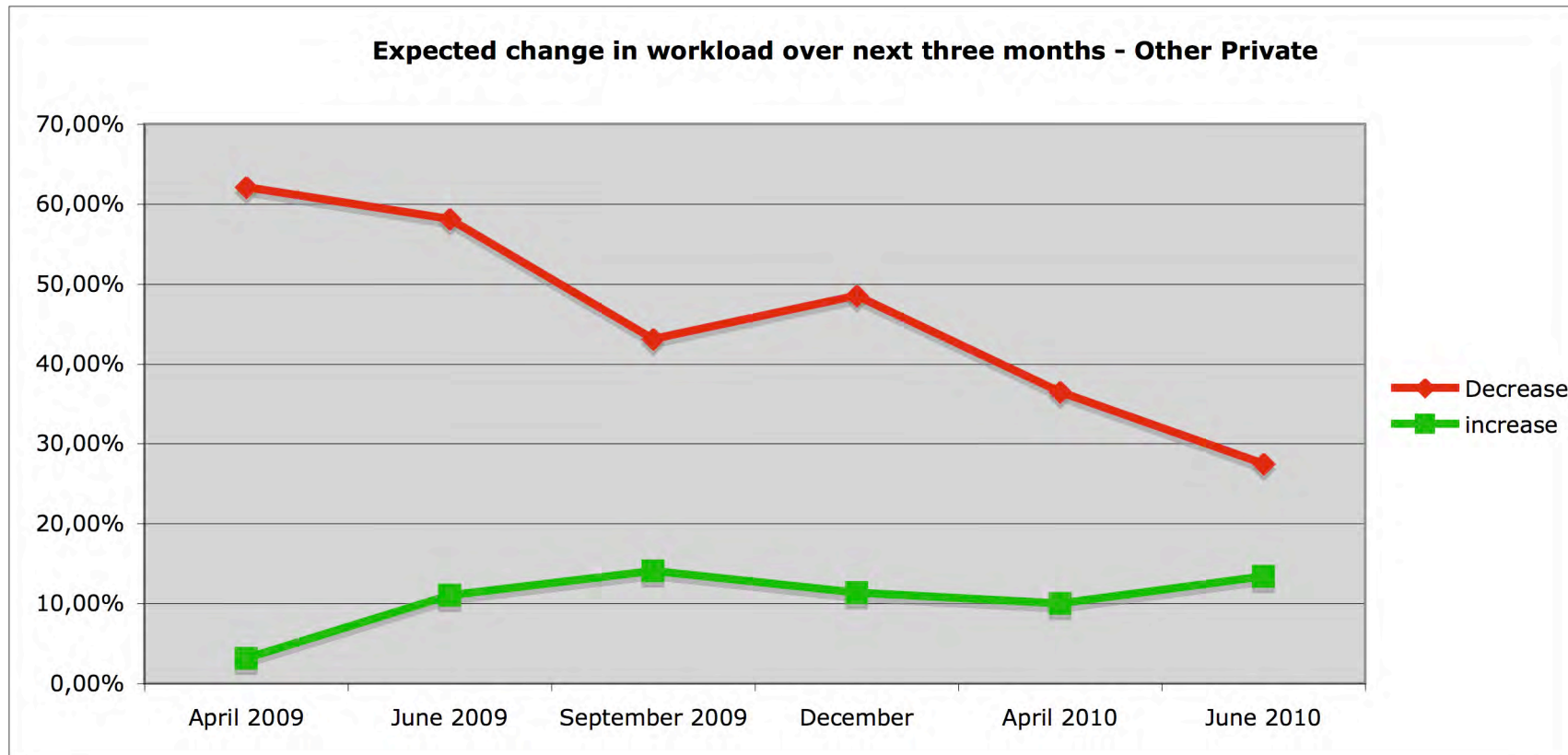
## Expected Change in Workload Over Next 3 Months: Other Private



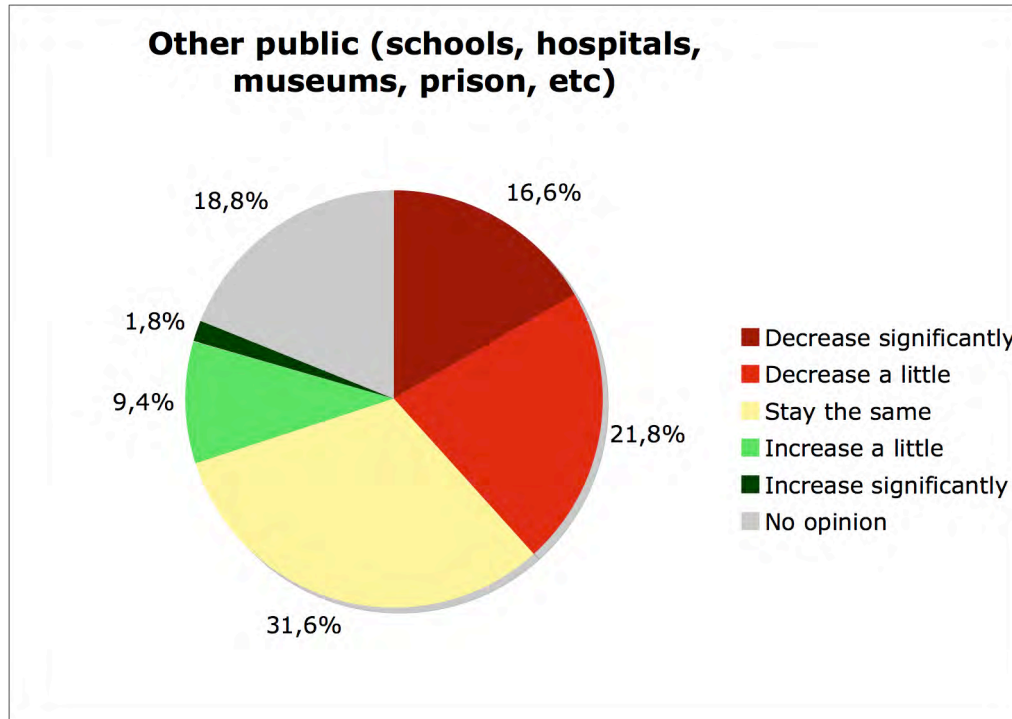
Readers are reminded that “other private” projects account for 10% of the market for architects in Europe

	Decrease	Increase
April 2009	62,07%	3,12%
June 2009	58,16%	11,05%
September 2009	43,12%	14,06%
December	48,50%	11,40%
April 2010	36,50%	10,00%
June 2010	27,50%	13,40%

## Expected Change in Workload Over Next 3 Months: Other Private



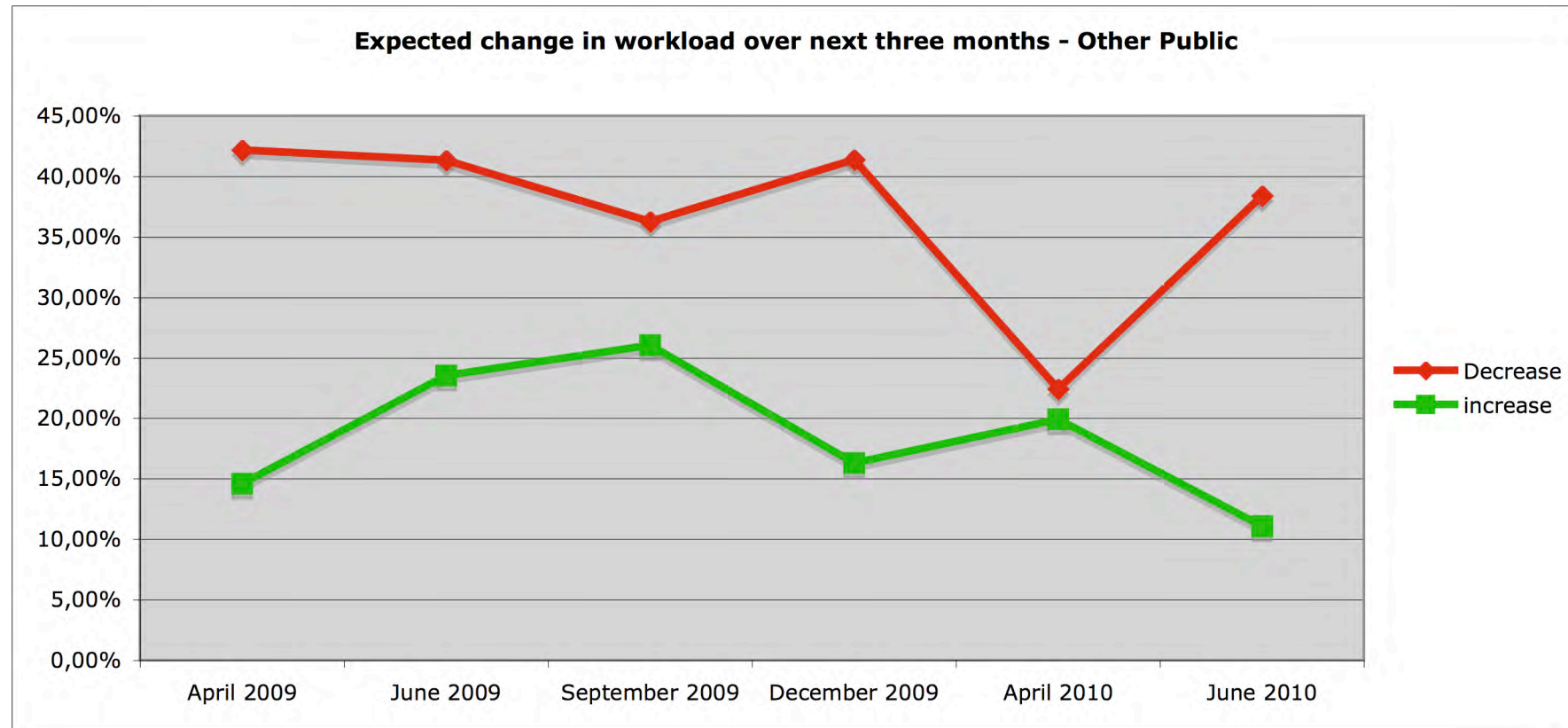
## Expected Change in Workload Over Next 3 Months: Other Public



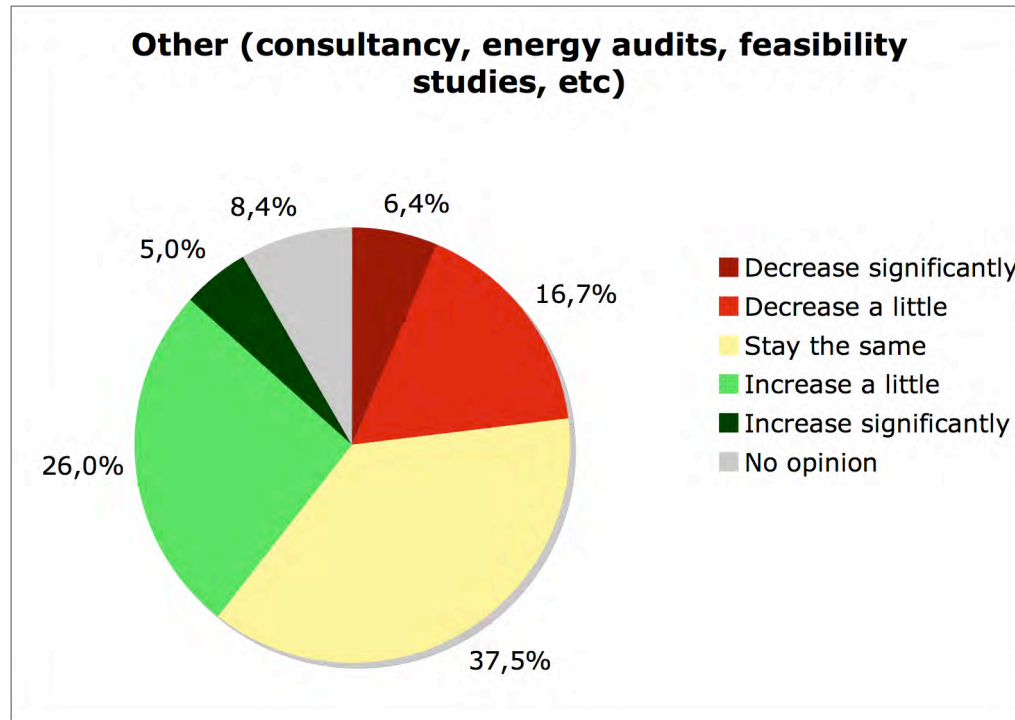
Readers are reminded that “other public” projects account for 20% of the market for architects in Europe

	Decrease	increase
April 2009	42,18%	14,58%
June 2009	41,34%	23,56%
September 2009	36,29%	26,02%
December 2009	41,40%	16,30%
April 2010	22,40%	19,90%
June 2010	38,40%	11,10%

## Expected Change in Workload Over Next 3 Months: Other Public



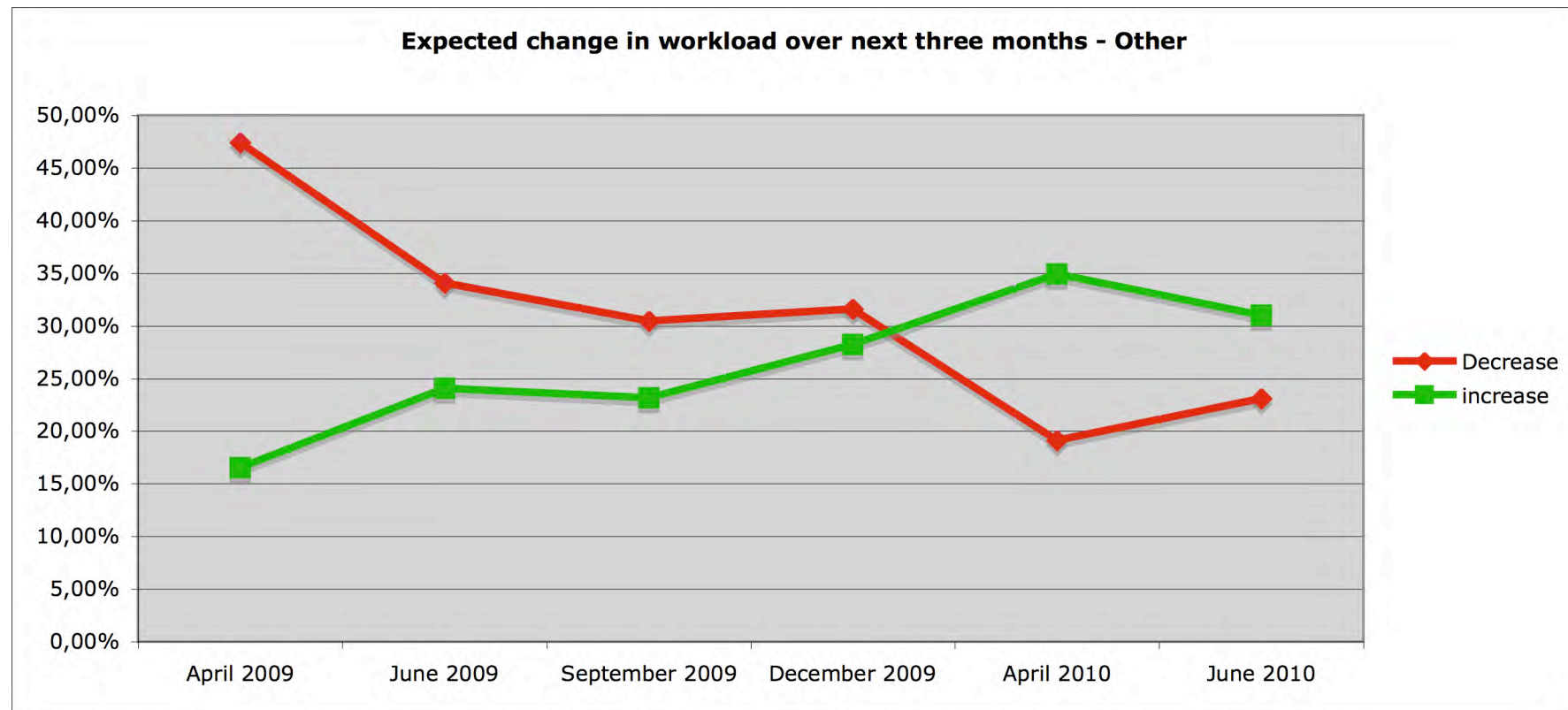
## Expected Change in Workload Over Next 3 Months: Other



It is not known what the percentage of the market for architects these tasks represent, but it remains the area that represents the least pessimism about future workloads

	Decrease	Increase
April 2009	47,38%	16,51%
June 2009	34,05%	24,07%
September 2009	30,47%	23,14%
December 2009	31,60%	28,20%
April 2010	19,10%	34,90%
June 2010	23,10%	31,00%

## Expected Change in Workload Over Next 3 Months: Other



## Conclusions:

- Important to continue to repeat the survey every 3 months
- The architectural profession continues to be badly affected by the economic downturn
- There is an increasing sense of optimism but a continued lack of confidence in the public sector
- A small recovery in terms of employment for architects is noted and seems to be strengthening.
- Architects expect to see increases in workload from the private sector over the next three months.

