



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

June 2011

Eight Snapshot Survey Of Impact of Economic Crisis

Eighth Economic Impact Survey

June 2011

Breakdown of Responses:

Country	Answers in June 2009	Answers in September 2009	Answers in December 2009	Answers in March 2010	Answers in June 2010	Answers in December 2010	Answers in June 2011
Austria	7	24	19	18	4	9	12
Belgium	630	31	39	443	336	48	352
Bosnia & Herzegovina	2	0	0	0	1	0	0
Bulgaria	17	170	96	105	75	164	251
Croatia	126	24	5	5	251	28	133
Cyprus	3	0	0	1	4	2	2
Czech Republic	55	151	67	57	134	224	216
Denmark	92	13	14	7	23	14	16
Estonia	23	0	39	26	17	1	2
Finland	32	30	17	5	12	18	22
France	1736	1508	1652	1374	1058	874	1048
FYROM	0	0	3	2	1	1	0
Germany	127	208	87	112	429	90	12
Greece	216	162	180	281	225	321	265
Hungary	121	5	0	3	2	2	1
Ireland	91	354	14	21	216	43	266
Italy	83	8	39	13	16	12	14

Secretariat of the ACE, Brussels

www.ace-cae.eu

June 2011

Eighth Economic Impact Survey

June 2011

Breakdown of Responses:

Country	Answers in June 2009	Answers in September 2009	Answers in December 2009	Answers in March 2010	Answers in June 2010	Answers in December 2010	Answers in June 2011
Latvia	22	12	22	1	12	21	18
Lithuania	37	0	35	2	33	46	25
Luxembourg	12	5	9	6	5	4	60
Malta	13	11	15	3	21	1	0
Netherlands	7	9	14	10	36	16	5
Norway	2	0	2	1	0	75	2
Poland	18	54	53	59	35	312	48
Portugal	75	17	80	14	10	10	2
Romania	315	296	210	198	210	220	149
Slovakia	0	0	28	0	1	2	2
Slovenia	9	11	92	61	4	75	52
Spain	21	18	600	678	12	244	12
Sweden	51	16	12	14	13	38	24
Switzerland	6	7	3	3	6	4	4
Turkey	130	147	123	203	128	838	543
United Kingdom	27	32	22	27	34	25	77
TOTAL	4106	3323	3591	3753	3363	3782	3634

Secretariat of the ACE, Brussels

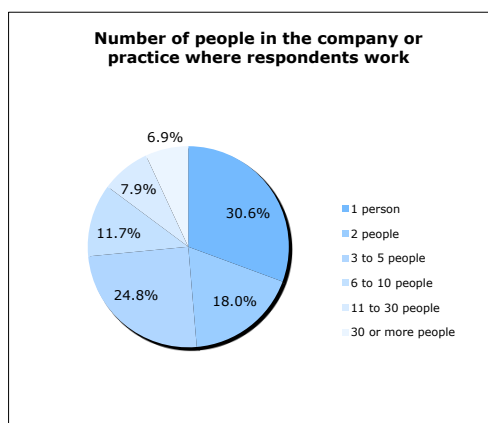
www.ace-cae.eu

June 2011

Eighth Economic Impact Survey

June 2011

Profile of Respondents:



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

**Spread Reflects
Sector Study Profile
well**

**No Other Information
About Respondents
was Sought**

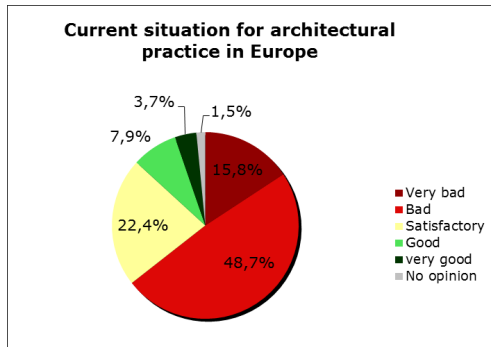
Secretariat of the ACE, Brussels

www.ace-cae.eu

June 2011

Eighth Economic Impact Survey

June 2011



Level of Optimism has decreased again, with a much higher level of pessimism (64,4%) than December 2010

	Pessimistic	Optimistic
June 2011	64,40%	11,70%
December 2010	53,70%	14,00%
June 2010	44,70%	19,70%
April 2010	65,50%	11,40%
December 2009	58,40%	15,10%
September 2009	56,03%	13,21%
June 2009	58,55%	12,67%

Survey to be Repeated in December 2011 to Extend Trend Analysis

Secretariat of the ACE, Brussels

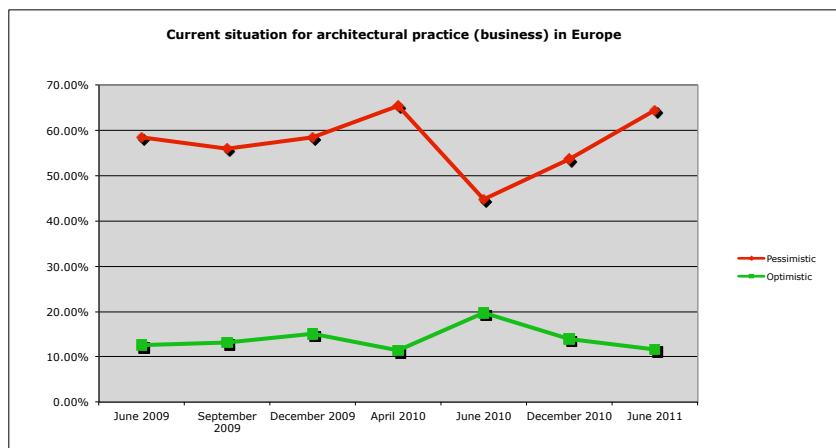
www.ace-cae.eu

June 2011

Eighth Economic Impact Survey

June 2011

Current Situation for Architectural Practice in Europe



Secretariat of the ACE, Brussels

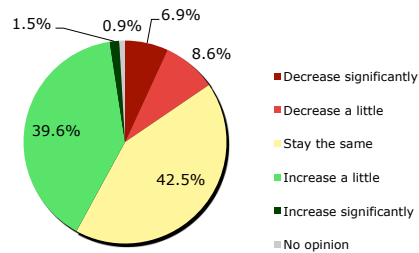
www.ace-cae.eu

June 2011

Eighth Economic Impact Survey

June 2011

Expectation, for the next three months, of architectural workload



Breakdown by Building Type Comes Later in the Presentation

Expectations for an increase in workload have risen for the first time since April 2010 with expectations for a decrease at their lowest ever

A positive sign?

	Decrease	Increase
June 2011	15,50%	41,10%
December 2010	32,80%	27,60%
June 2010	23,20%	29,20%
April 2010	21,10%	46,10%
December 2009	32,80%	22,40%
September 2009	32,30%	24,49%
June 2009	39,60%	20,11%

Secretariat of the ACE, Brussels

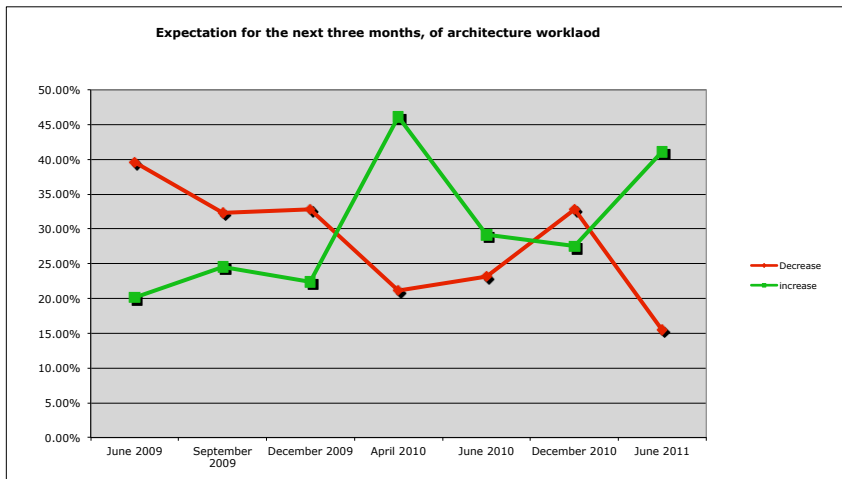
www.ace-cae.eu

June 2011

Eighth Economic Impact Survey

June 2011

Expectation, for the next three months, of Architecture Workload



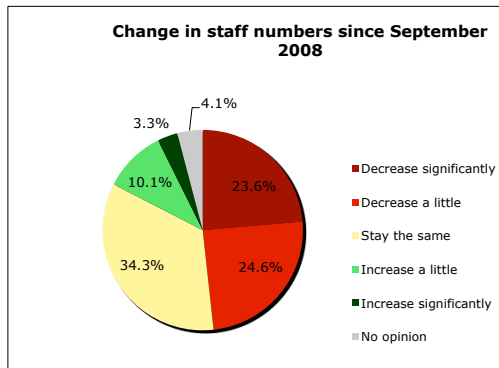
Secretariat of the ACE, Brussels

www.ace-cae.eu

June 2011

Eighth Economic Impact Survey

June 2011



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

	Decrease	Increase
June 2011	48,30%	13,40%
December 2010	42,30%	14,00%
June 2010	47,90%	14,50%
April 2010	36,10%	12,10%
December 2009	40,90%	15,20%
September 2009	37,49%	12,12%
June 2009	53,60%	11,36%

Secretariat of the ACE, Brussels

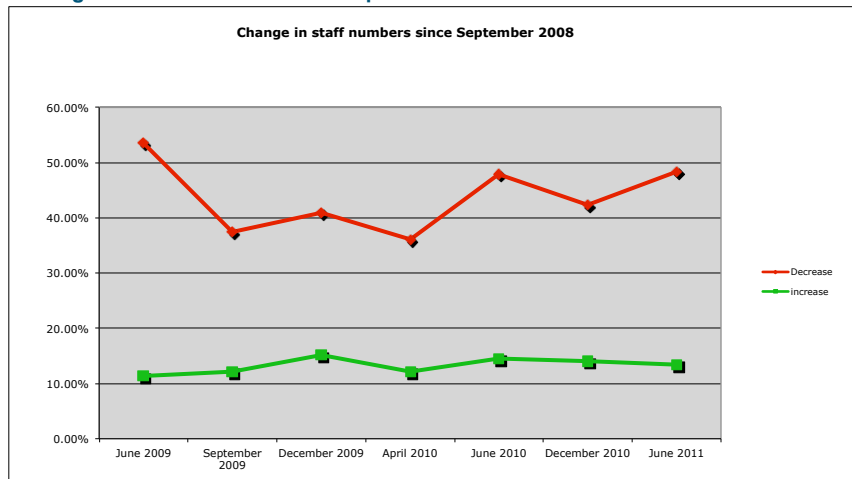
www.ace-cae.eu

June 2011

Eighth Economic Impact Survey

June 2011

Change in Staff Numbers since September 2008



Secretariat of the ACE, Brussels

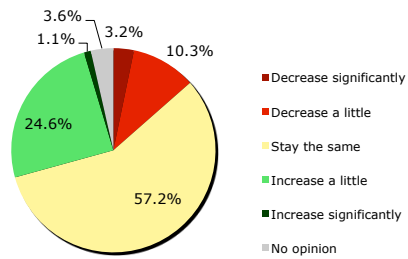
www.ace-cae.eu

June 2011

Eighth Economic Impact Survey

June 2011

Expectation, for the next three months, of change in staff numbers



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

	Decrease	Increase
June 2011	13,50%	25,70%
December 2010	15,00%	17,80%
June 2010	15,00%	23,00%
April 2010	15,80%	17,00%
December 2009	17,00%	13,20%
September 2009	21,07%	12,25%
June 2009	23,60%	12,90%

Secretariat of the ACE, Brussels

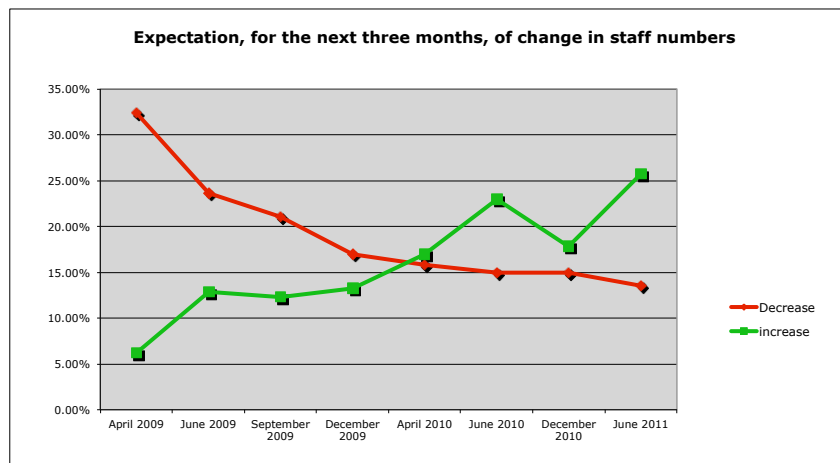
www.ace-cae.eu

June 2011

Eighth Economic Impact Survey

June 2011

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

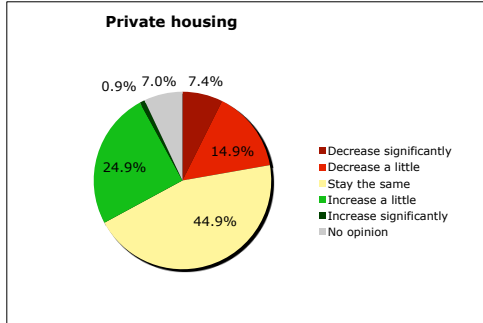


Secretariat of the ACE, Brussels

www.ace-cae.eu

June 2011

Expected Change in Workload Over Next 3 Months: Private Housing

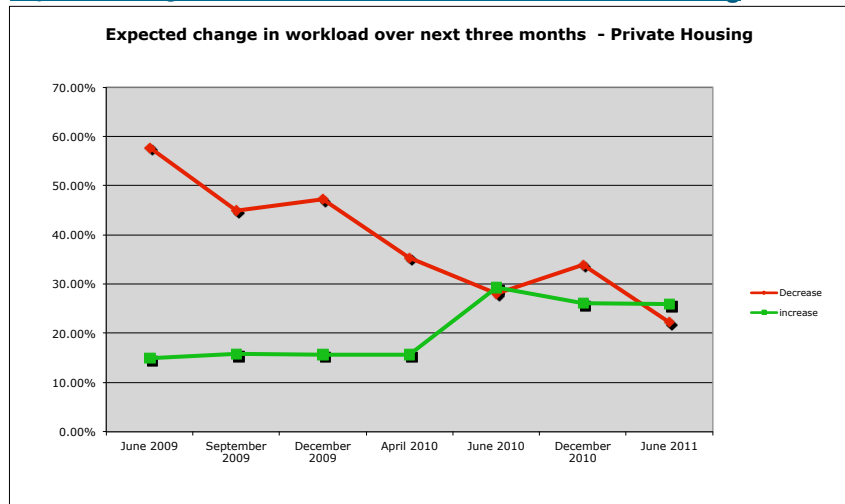


Readers are reminded that "private housing" accounts for 44% of the market for architects in Europe

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

	Decrease	Increase
June 2011	22,20%	25,90%
December 2010	34,00%	26,20%
June 2010	28,00%	29,30%
April 2010	35,30%	15,60%
December 2009	47,30%	15,70%
September 2009	44,84%	15,88%
June 2009	57,60%	14,87%

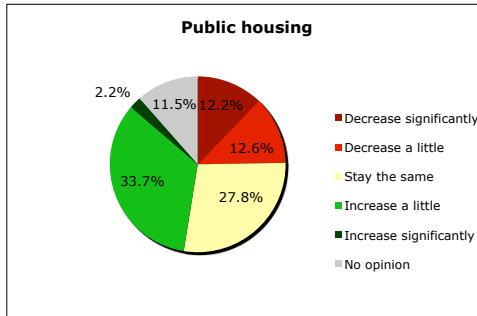
Expected Change in Workload Over Next 3 Months: Private Housing



Eighth Economic Impact Survey

June 2011

Expected Change in Workload Over Next 3 Months: Public Housing



Readers are reminded that "public housing" accounts for 6% of the market for architects in Europe

	Decrease	Increase
June 2011	24,70%	35,90%
December 2010	43,00%	20,30%
June 2010	32,50%	22,50%
April 2010	30,30%	24,50%
December 2009	48,30%	9,80%
September 2009	42,75%	17,31%
June 2009	49,90%	15,31%

Secretariat of the ACE, Brussels

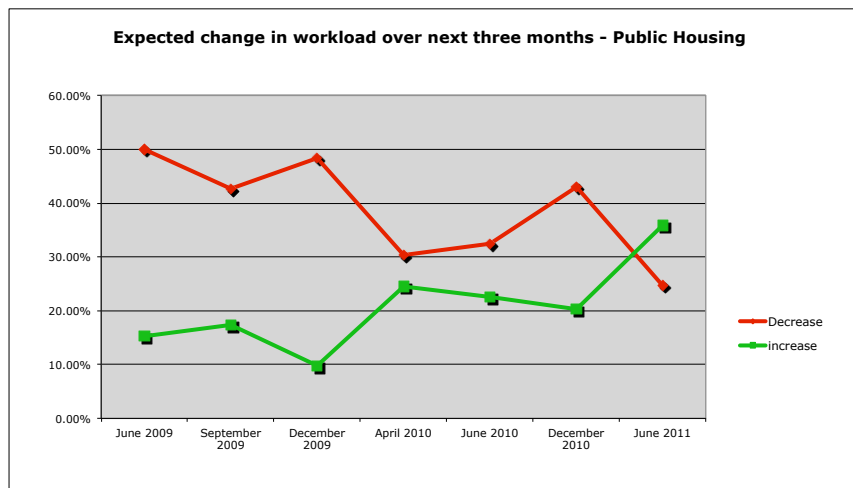
www.ace-cae.eu

June 2011

Eighth Economic Impact Survey

June 2011

Expected Change in Workload Over Next 3 Months: Public Housing



Secretariat of the ACE, Brussels

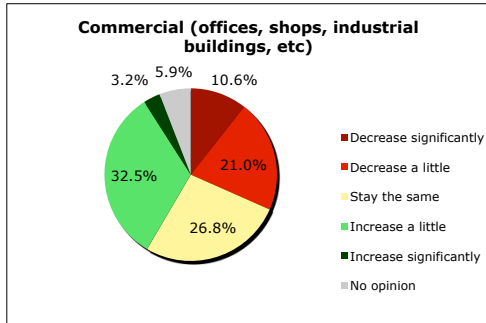
www.ace-cae.eu

June 2011

Eighth Economic Impact Survey

June 2011

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
June 2011	31,60%	35,70%
December 2010	40,10%	20,60%
June 2010	33,70%	14,40%
April 2010	48,00%	15,80%
December 2009	57,80%	9,50%
September 2009	53,71%	11,56%
June 2009	62,87%	10,08%

Secretariat of the ACE, Brussels

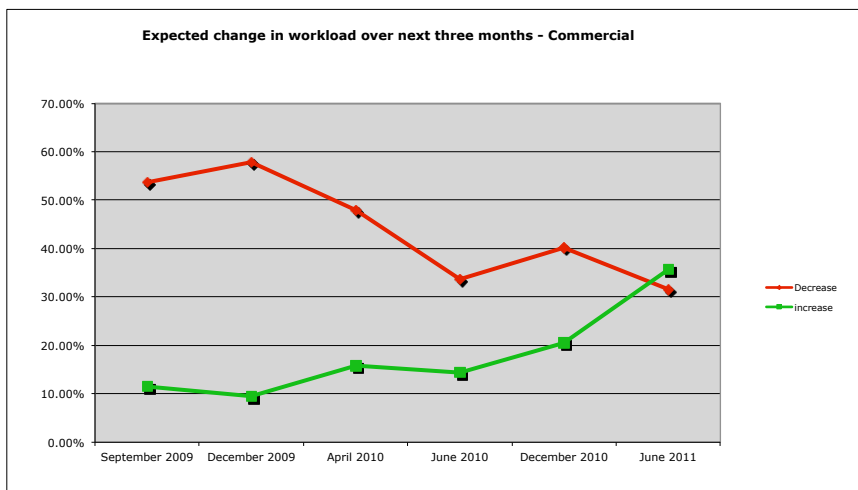
www.ace-cae.eu

June 2011

Eighth Economic Impact Survey

June 2011

Expected Change in Workload Over Next 3 Months: Commercial



Secretariat of the ACE, Brussels

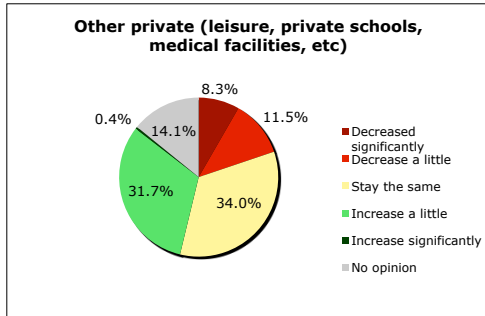
www.ace-cae.eu

June 2011

Eighth Economic Impact Survey

June 2011

Expected Change in Workload Over Next 3 Months: Other Private



Readers are reminded that "other private" projects account for 7% of the market for architects in Europe

	Decrease	Increase
June 2011	19,80%	32,10%
December 2010	35,40%	13,90%
June 2010	27,50%	13,40%
April 2010	36,50%	10,00%
December	48,50%	11,40%
September 2009	43,12%	14,06%
June 2009	58,16%	11,05%

Secretariat of the ACE, Brussels

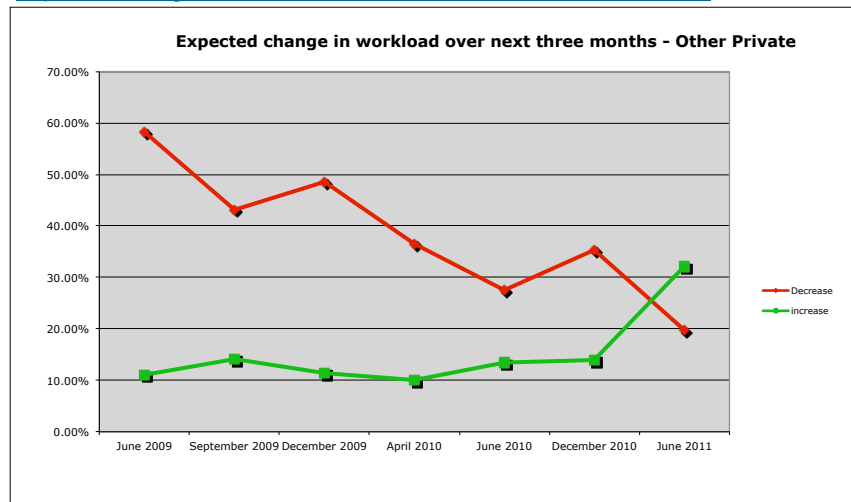
www.ace-cae.eu

June 2011

Eighth Economic Impact Survey

June 2011

Expected Change in Workload Over Next 3 Months: Other Private



Secretariat of the ACE, Brussels

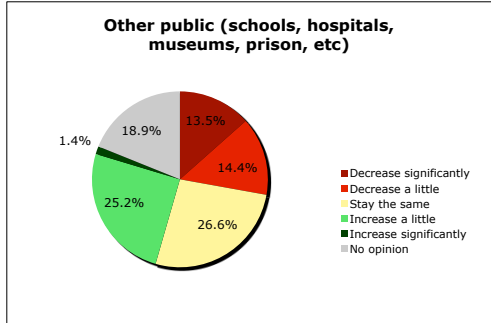
www.ace-cae.eu

June 2011

Eighth Economic Impact Survey

June 2011

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
June 2011	27,80%	26,60%
December 2010	38,10%	20,10%
June 2010	38,40%	11,10%
April 2010	22,40%	19,90%
December 2009	41,40%	16,30%
September 2009	36,29%	26,02%
June 2009	41,34%	23,56%

Secretariat of the ACE, Brussels

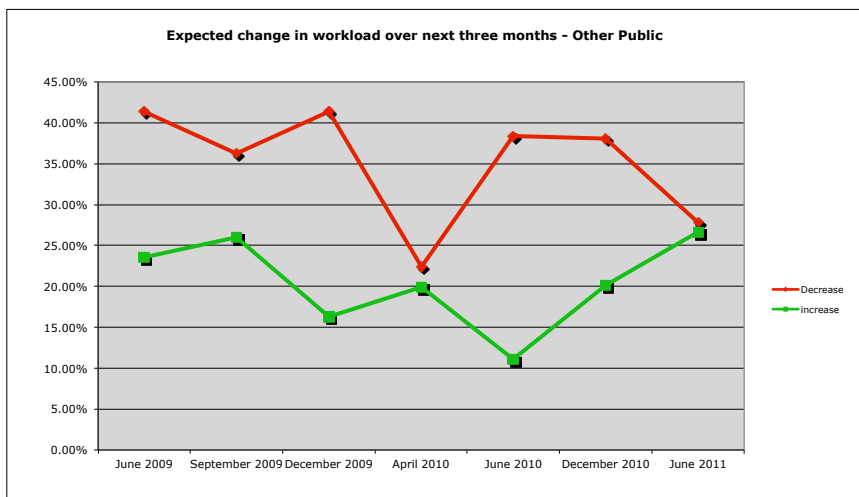
www.ace-cae.eu

June 2011

Eighth Economic Impact Survey

June 2011

Expected Change in Workload Over Next 3 Months: Other Public



Secretariat of the ACE, Brussels

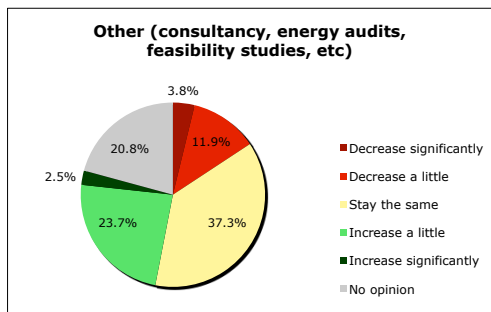
www.ace-cae.eu

June 2011

Eighth Economic Impact Survey

June 2011

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
June 2011	15,70%	26,20%
December 2010	26,00%	36,10%
June 2010	23,10%	31,00%
April 2010	19,10%	34,90%
December 2009	31,60%	28,20%
September 2009	30,47%	23,14%
June 2009	34,05%	24,07%

Secretariat of the ACE, Brussels

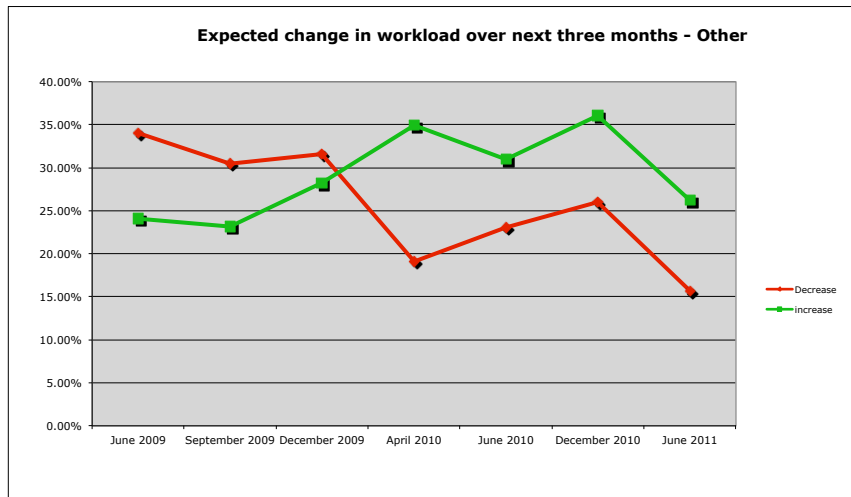
www.ace-cae.eu

June 2011

Eighth Economic Impact Survey

June 2011

Expected Change in Workload Over Next 3 Months: Other



Secretariat of the ACE, Brussels

www.ace-cae.eu

June 2011

Conclusions:

- The profession is regaining some confidence with a significant swing in expectations about future workloads in all work areas
- This survey represents the first time that a glimmer of hope has arisen since September 2011
- The small recovery in terms of employment for architects as noted in December 2010 seems to be getting stronger
- The second dip in the recession that was obvious in December 2010 appears to have been short-lived as is often the case in such economic patterns

