ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

September 2009

Third Snapshot Survey Of Impact of Economic Crisis

Second Economic Impact Survey **Sept-09**

Methodology:

- Secretariat Used the Same Questions as the 1st and 2nd Surveys and the ACE Internet Service Provider Created the Online Questionnaire
- Questions Translated into 15 Languages
- E-mail Invitation sent to 3,100 E-mail Addresses of "Volunteers" from Sector Study
- Member Organisations Invited to Circulate the Invitation to all Architect Members
- Questionnaire Open for 2 Week Period (Ended 27th June)
- 3,323 Responses from ACE Member Countries
- All results weighted to give more Statistical Reliability

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Breakdown of Responses:

Country	Answers in April	Answers in June	Answers in September
France	17	1736	1508
Irlande	13	91	354
Romania	36	315	296
Germany	75	127	208
Bulgaria	0	17	170
Greece	235	216	162
Czech Republic	128	55	151
Turkey	37	130	147
Poland	12	18	54
United Kingdom	21	27	32
Belgium	995	630	31
Finland	210	32	30
Austria	18	7	24
Croatia	0	126	24
Spain	1	21	18
Portugal	17	75	17
Sweden	17	51	16

Country	Answers in April	Answers in June	Answers in September
Denmark	13	92	13
Latvia	25	22	12
Malta	33	13	11
Slovenia	9	9	11
Netherlands	10	7	9
Italy	1	83	8
Switzerland	1	6	7
Hungary	0	121	5
Luxembourg	11	12	5
Cyprus	3	3	0
Estonia	25	23	0
FYROM	1	0	0
Lithuania	0	37	0
Norway	83	2	0
Slovakia	0	0	0
Bosnia & Herzegovina	0	2	0
TOTAL	**215**	**432**	**81**

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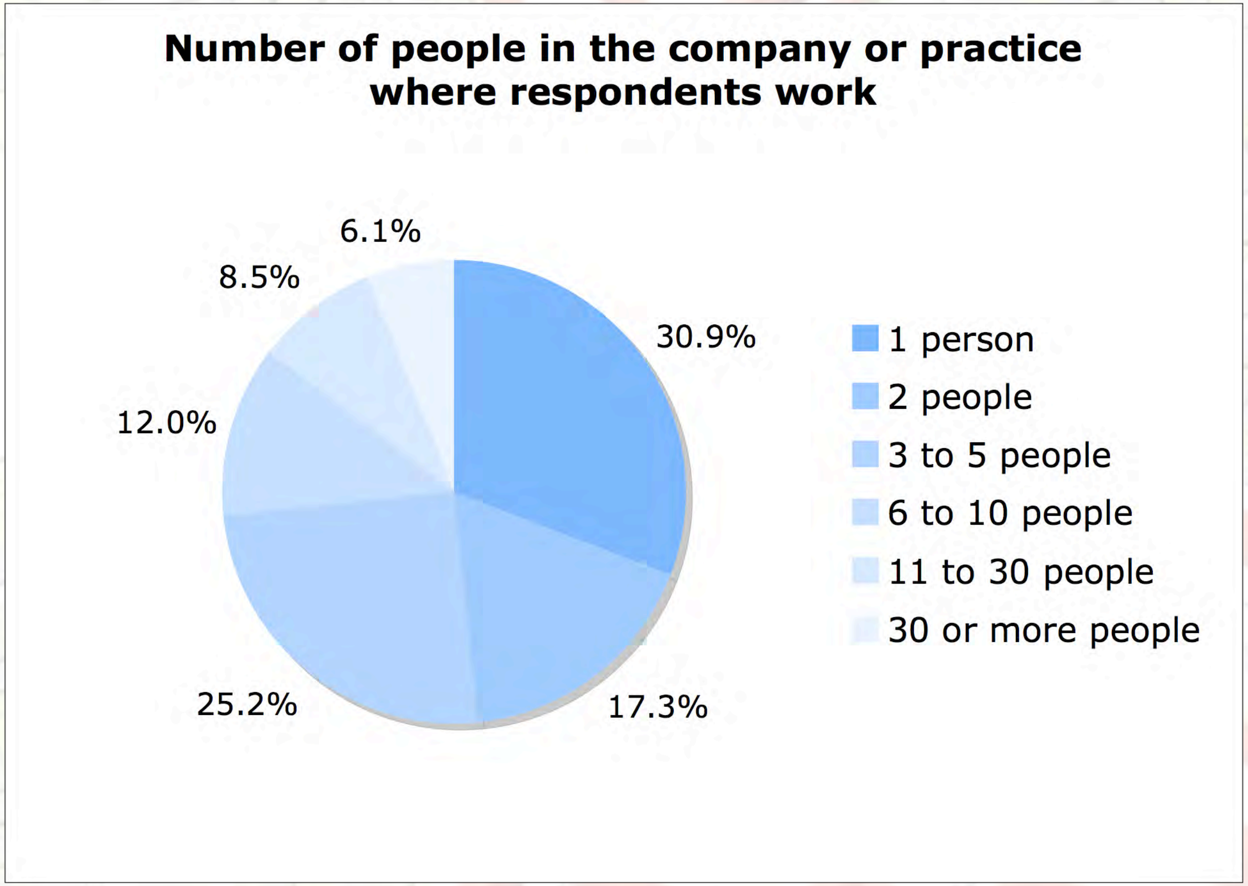
Profile of Respondents:



Good Representation from all sizes of Architectural Practice

Spread Reflects Sector Study Profile well

No Other Information About Respondents was Sought

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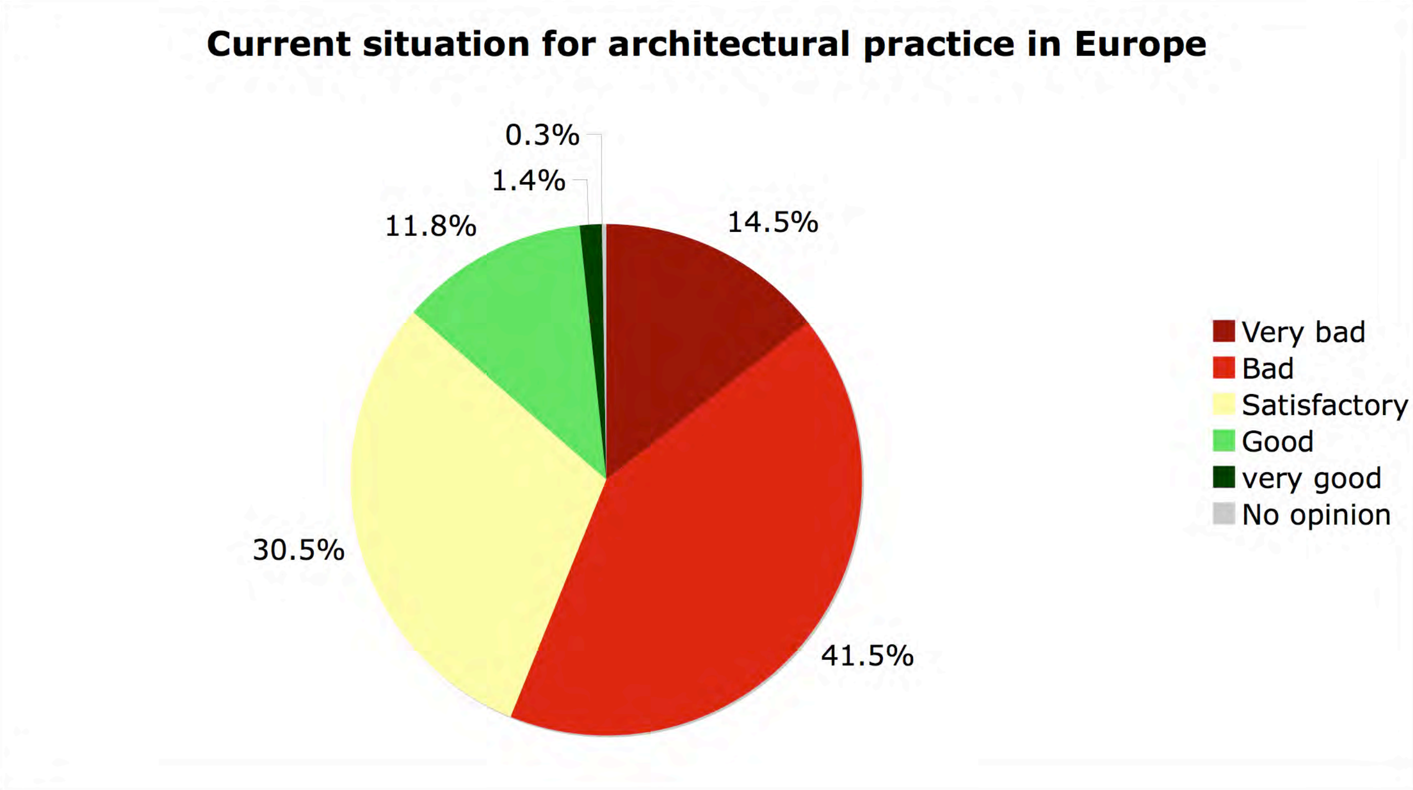

Overall a Trend Towards More Optimism as 2009 Advances

Survey to be Repeated in December 2009 to Extend Trend Analysis

	Pessimistic	Optimistic
April	65.16%	8.41%
June	58.55%	12.67%
September	56.03%	13.21%

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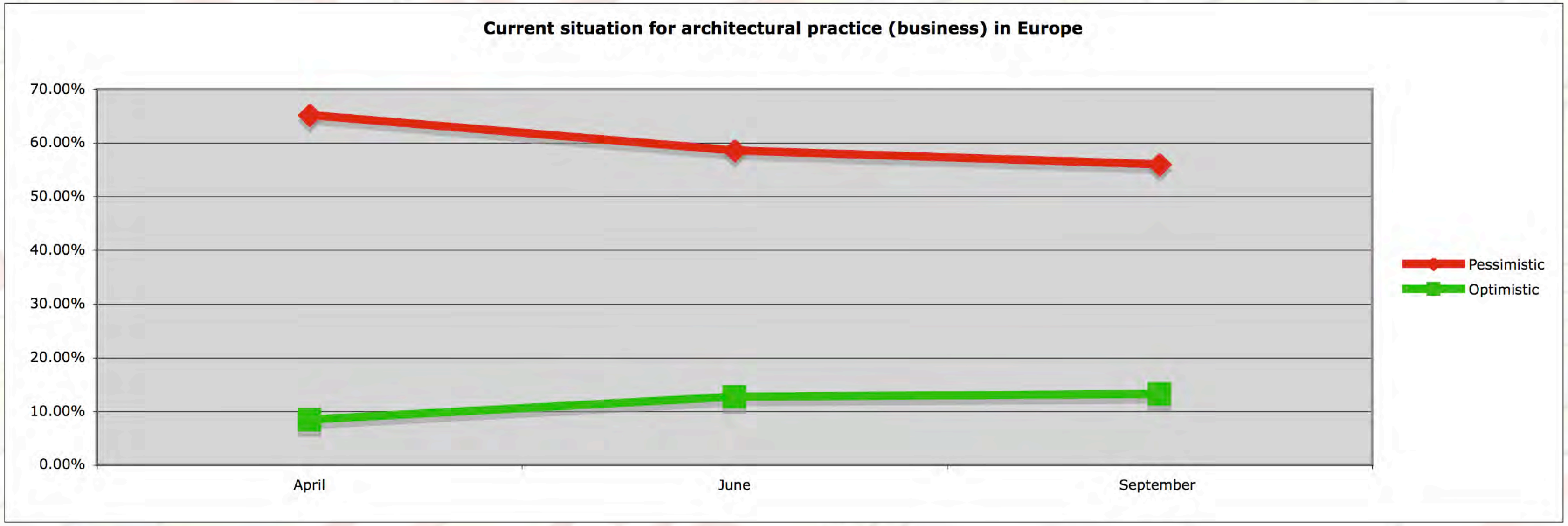
Current Situation for Architectural Practice in Europe



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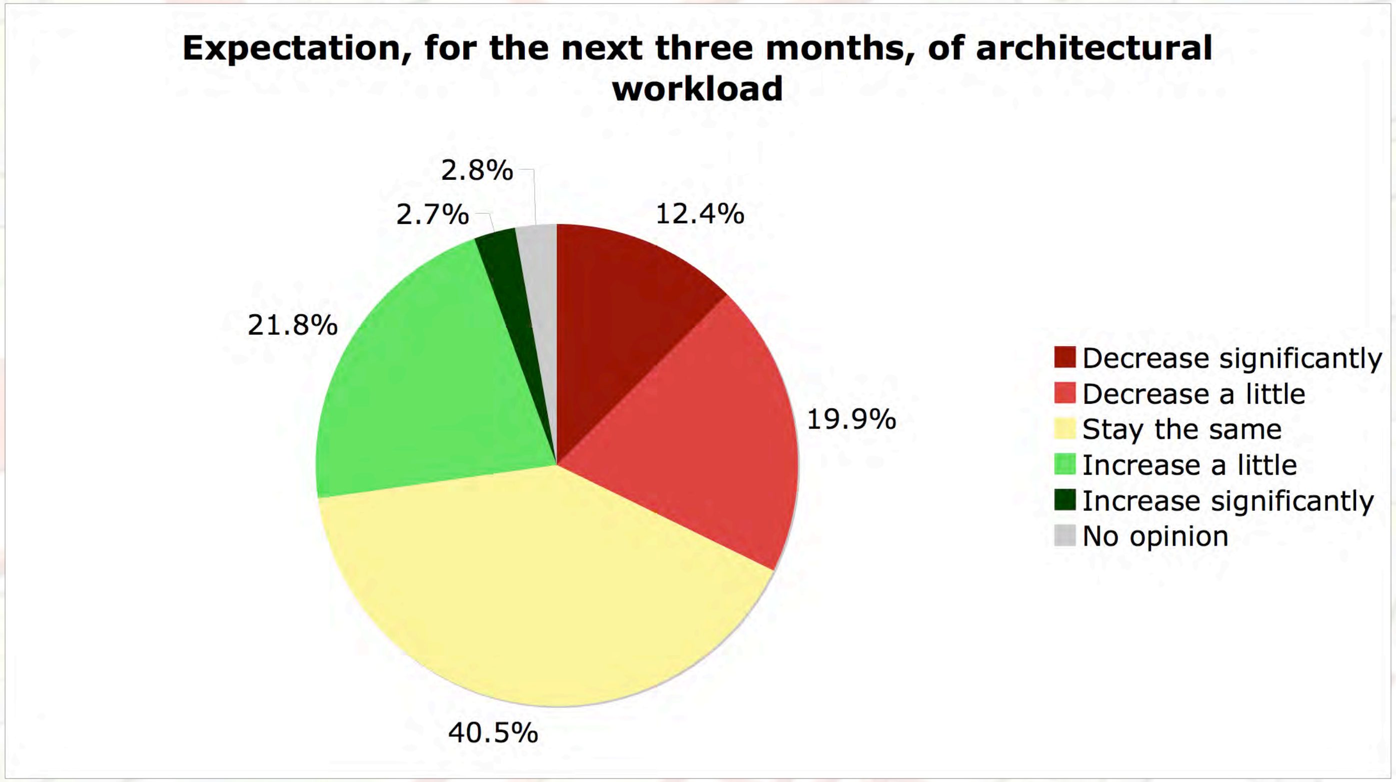

Breakdown by Building Type Comes Later in the Presentation

	Pessimistic	Optimistic
April	48.47%	13.09%
June	39.60%	20.11%
September	32.30%	24.49%

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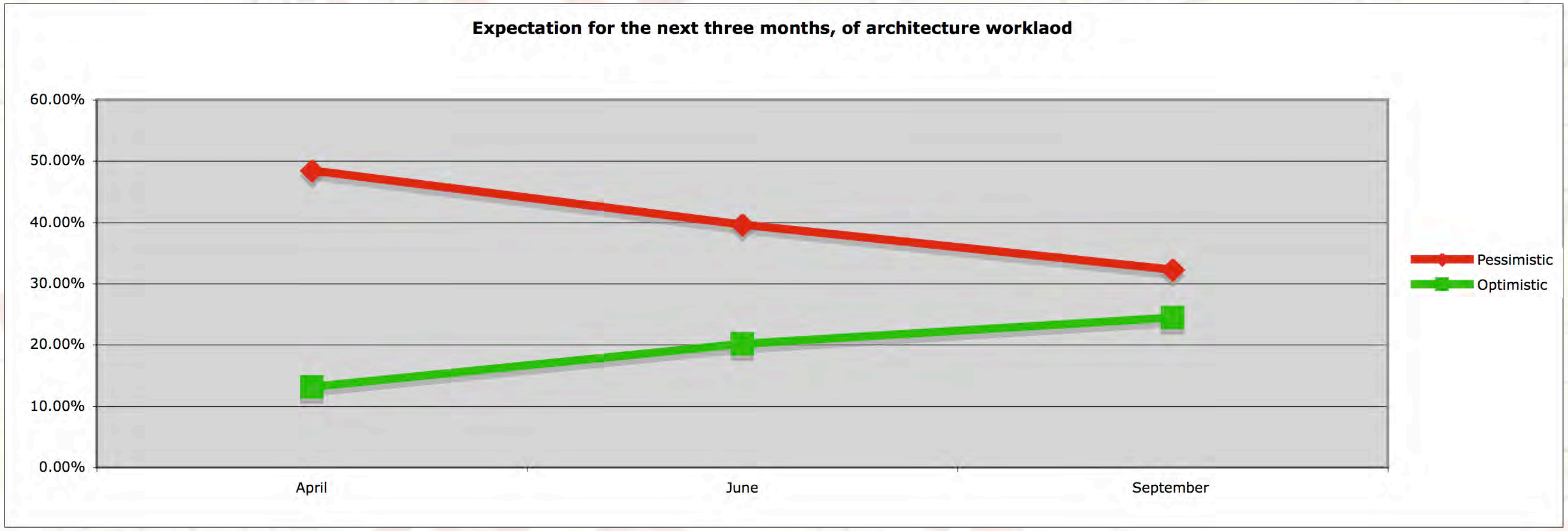
Expectation, for the next three months, of Architecture Workload



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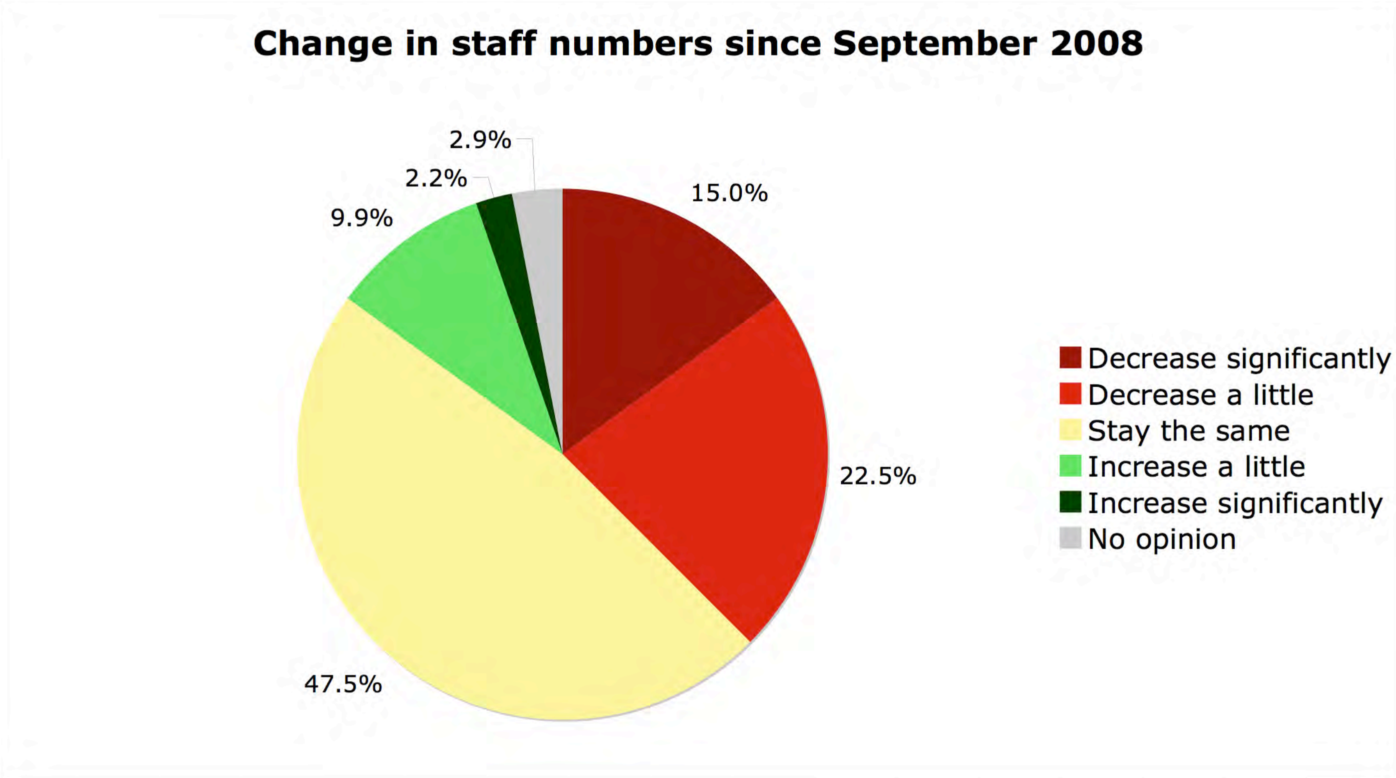

	Pessimistic	Optimistic
April	37.18%	6.85%
June	53.64%	11.36%
September	37.49%	12.12%

The assumption behind this question is that the economic crisis started to be felt in September 2008

From these answers we can see that 37% of architects offices have seen a decrease in staff numbers since September 2008

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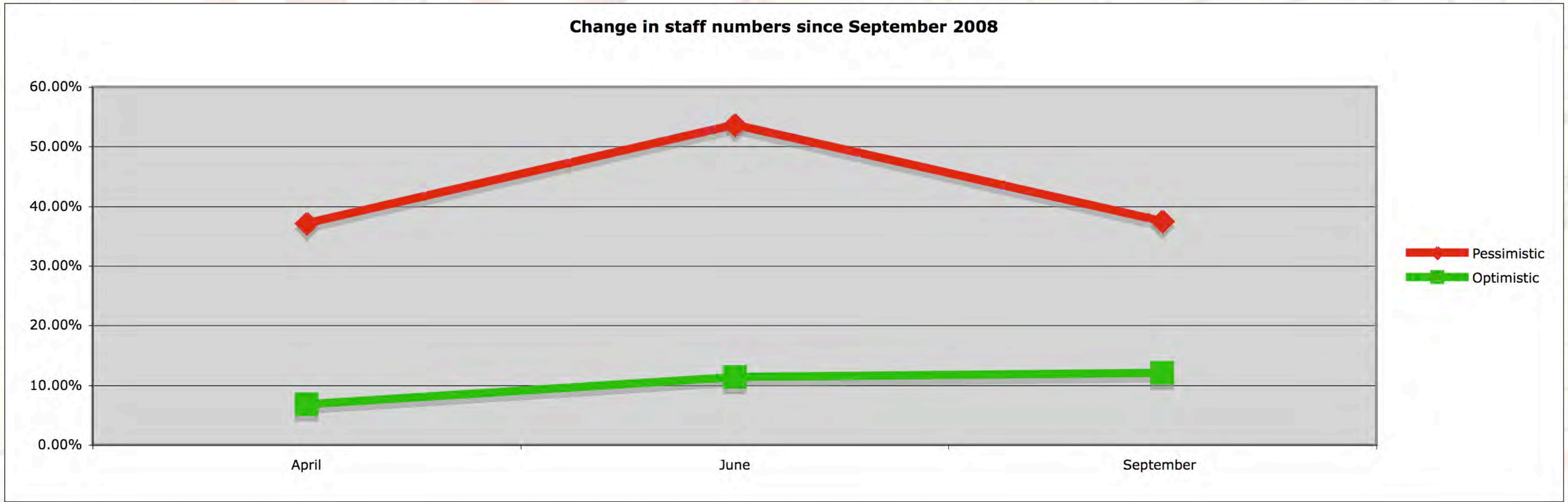
Change in Staff Numbers since September 2008



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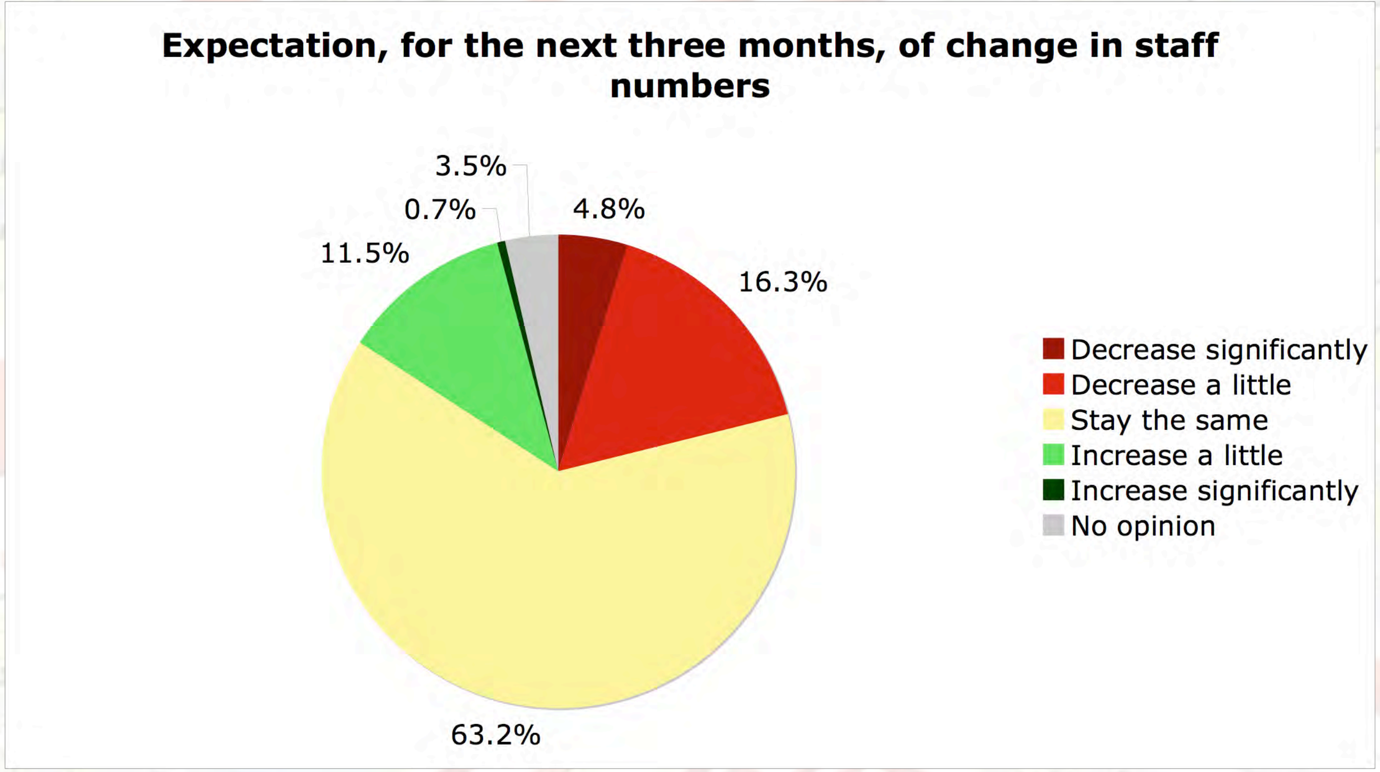

From this pie chart we can see that 21% of architects offices expect that staff numbers will decrease in the coming three months.

If linked to decreases reported in the previous slide, we can see that optimism about a recovery for the sector is still low but things are improving.

	Pessimistic	Optimistic
April	32.35%	6.15%
June	23.60%	12.90%
September	21.07%	12.25%

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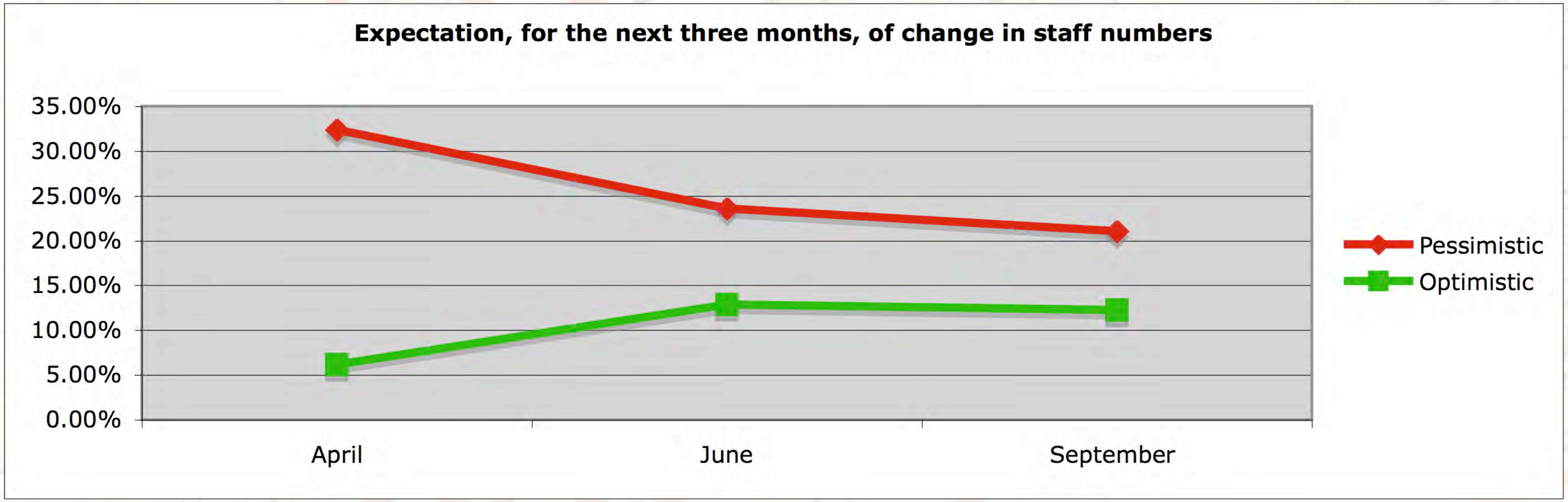
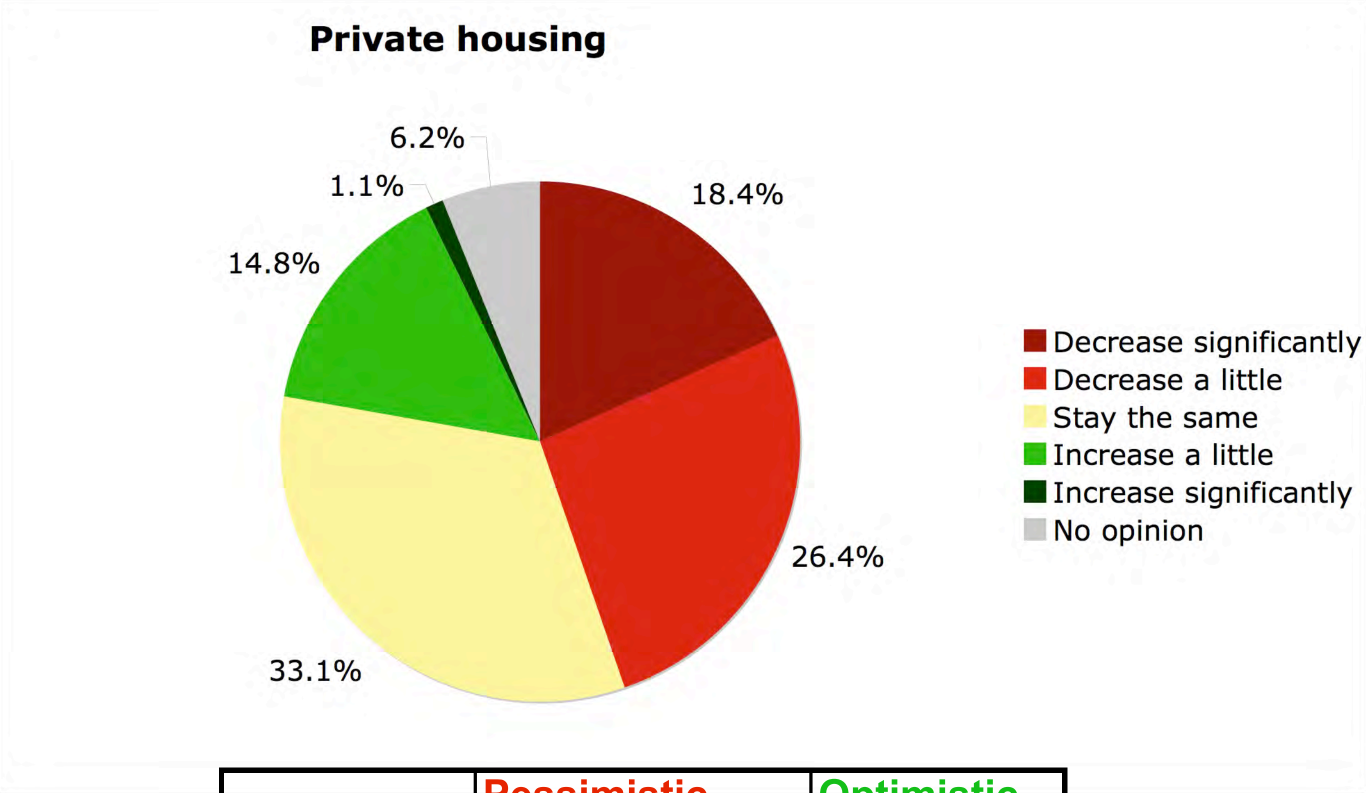
Expectation, for the next three months, for Change in Staff Numbers



Expected Change in Workload Over Next 3 Months:



	Pessimistic	Optimistic
April	67.04%	10.44%
June	57.60%	14.87%
September	44.84%	15.88%

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

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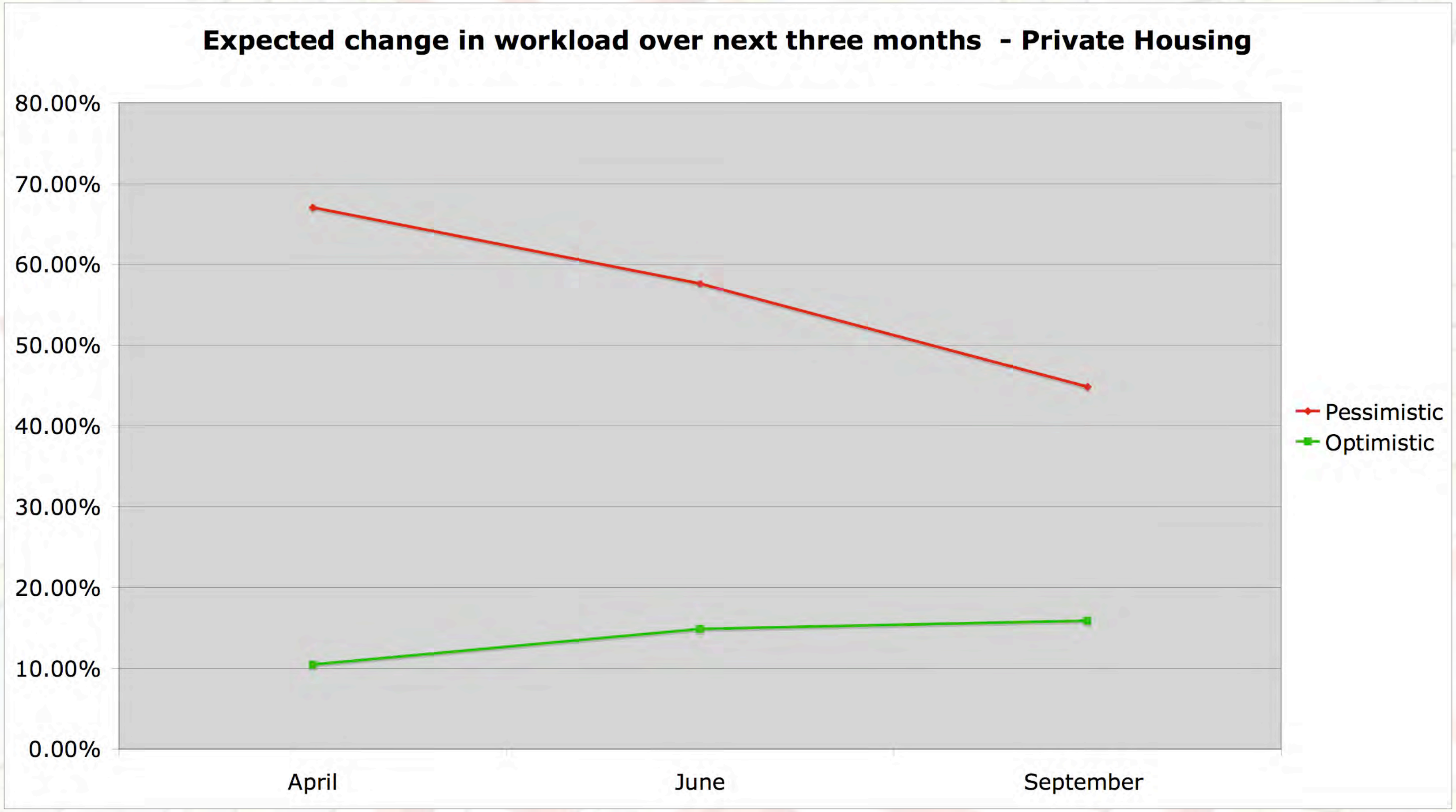
Expected Change in Workload Over Next 3 Months:



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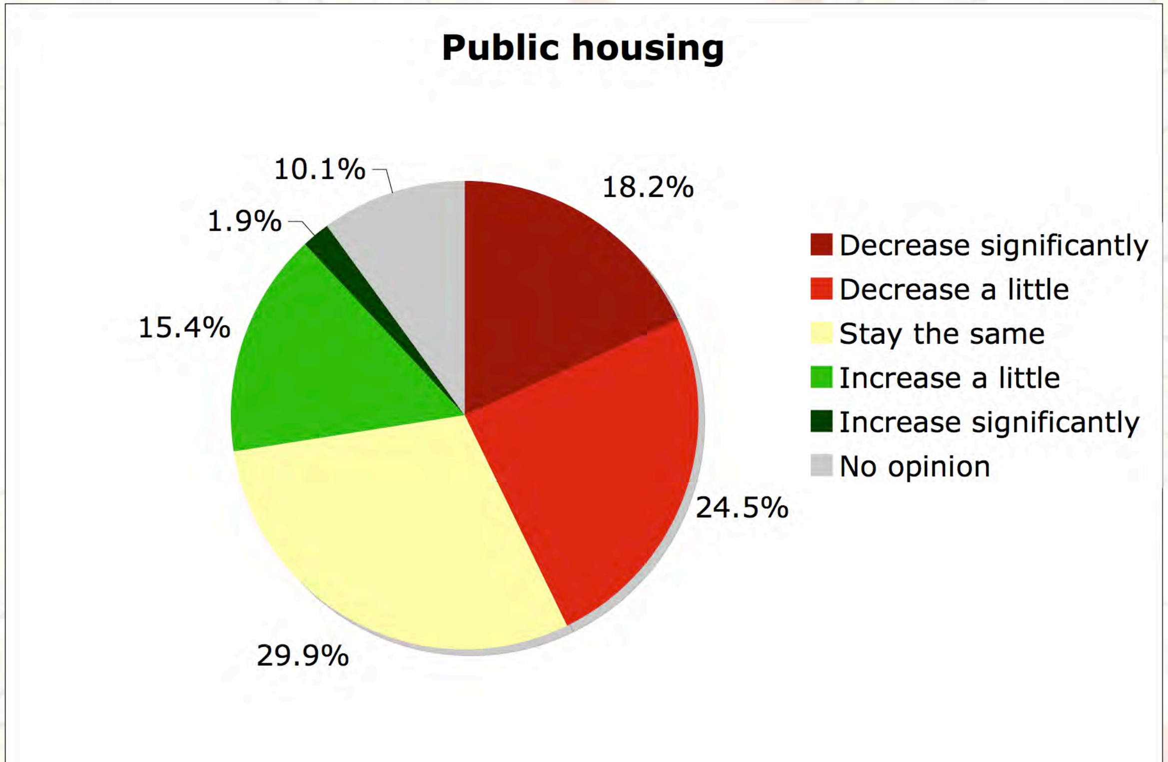
Expected Change in Workload Over Next 3 Months:



	Pessimistic	Optimistic
April	59.78%	9.73%
June	49.90%	15.31%
September	42.75%	17.31%

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

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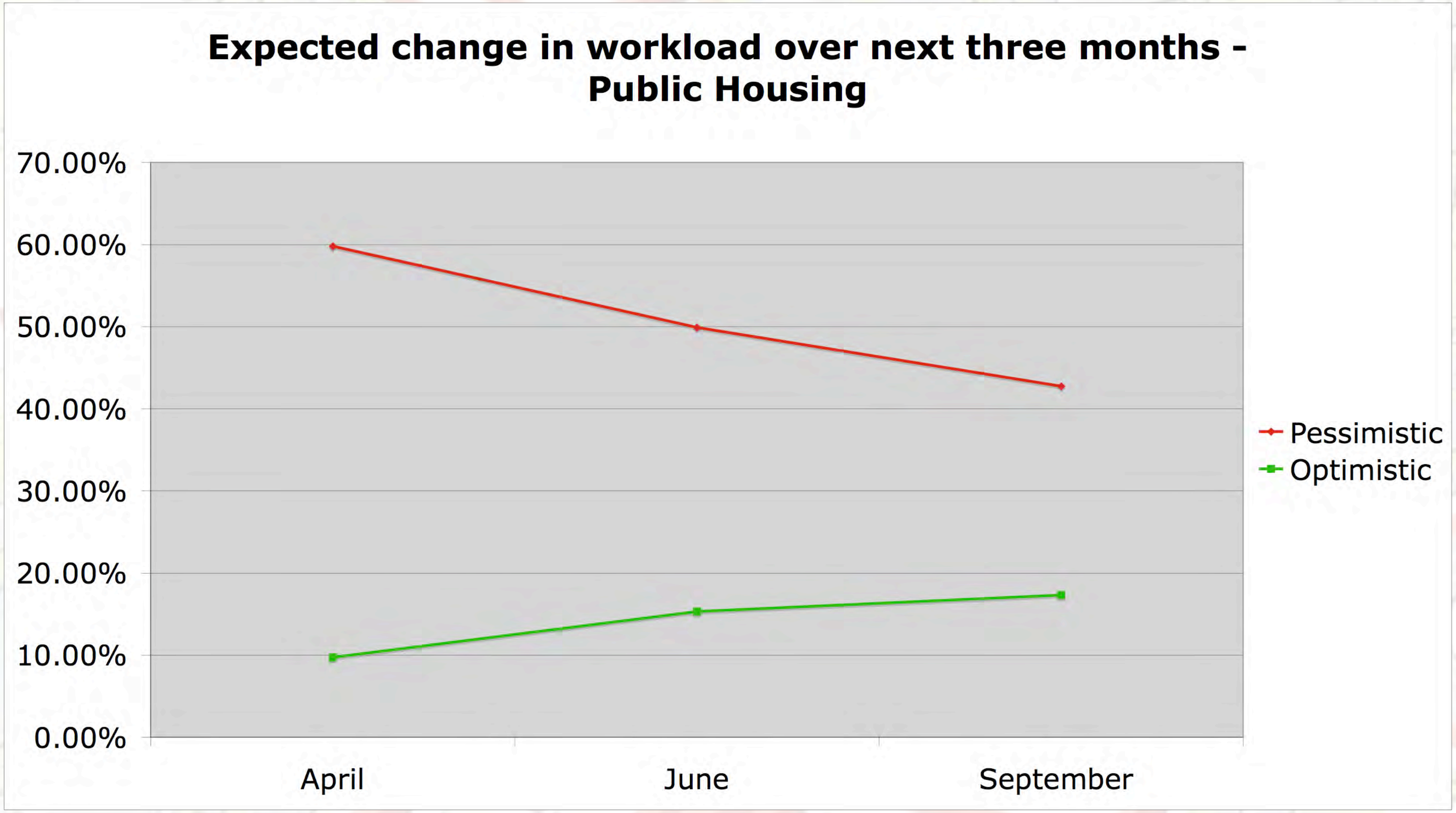
Expected Change in Workload Over Next 3 Months:



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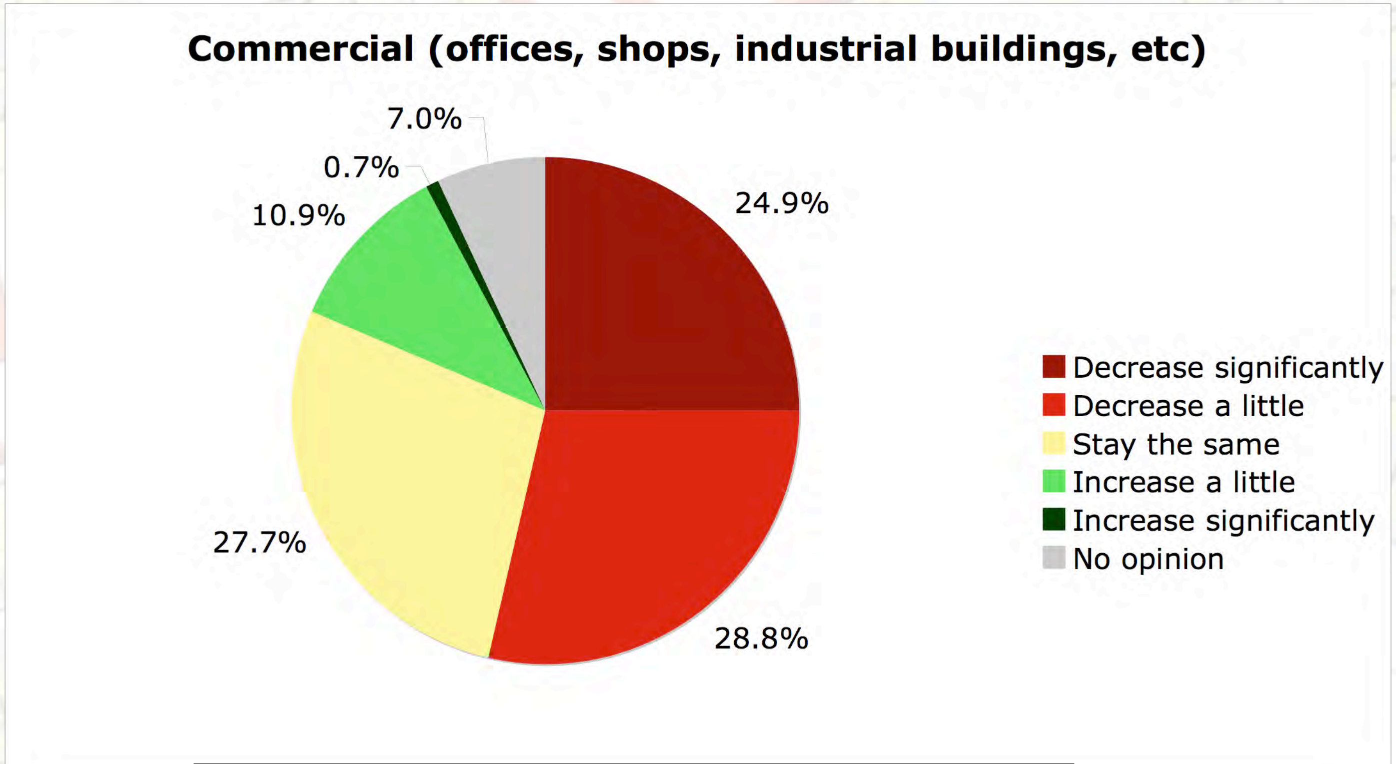
Expected Change in Workload Over Next 3 Months:



	Pessimistic	Optimistic
April	76.19%	5.18%
June	62.87%	10.08%
September	53.71%	11.56%

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

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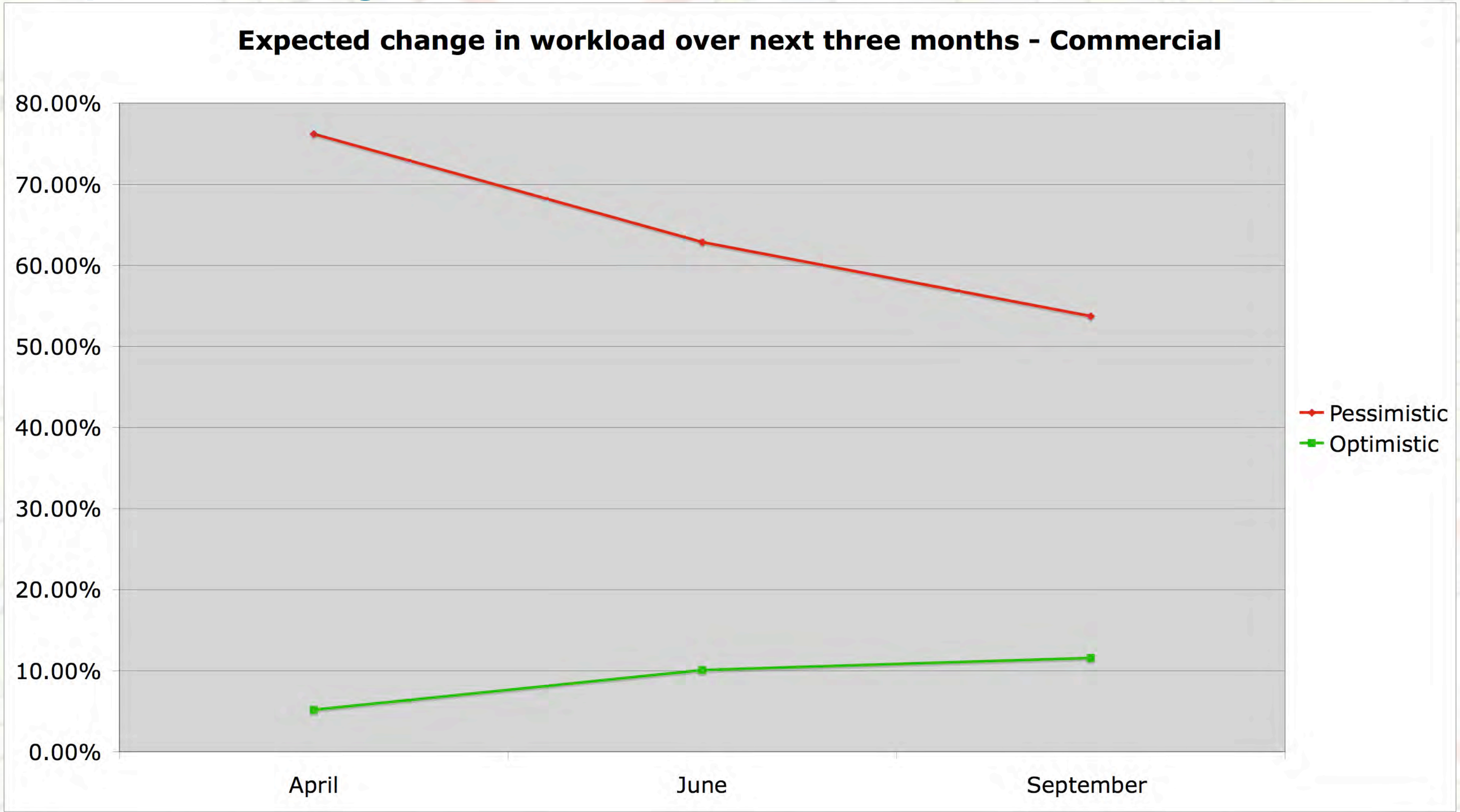
Expected Change in Workload Over Next 3 Months:



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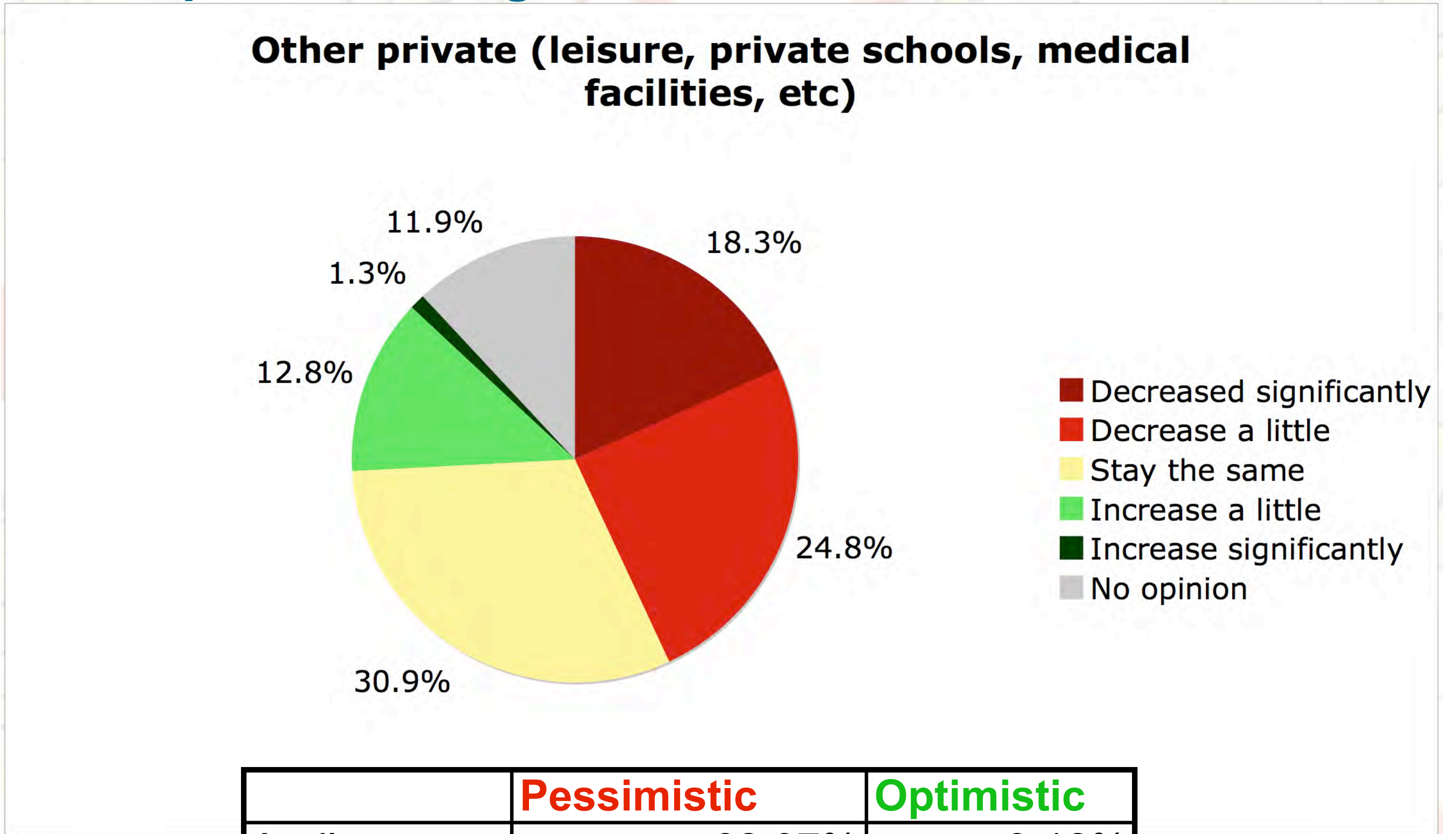
Expected Change in Workload Over Next 3 Months:



	Pessimistic	Optimistic
April	62.07%	3.12%
June	58.16%	11.05%
September	43.12%	14.06%

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

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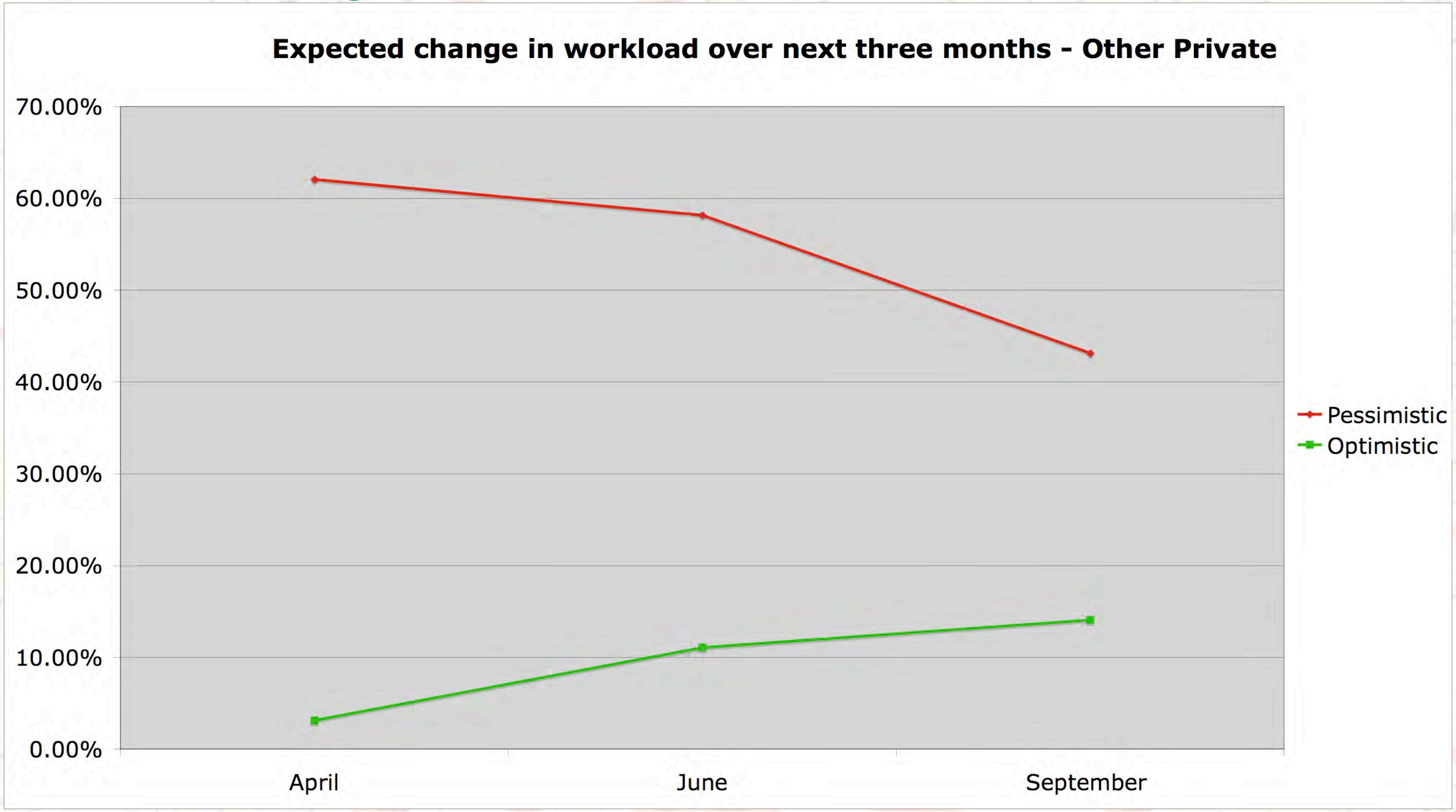
Expected Change in Workload Over Next 3 Months:



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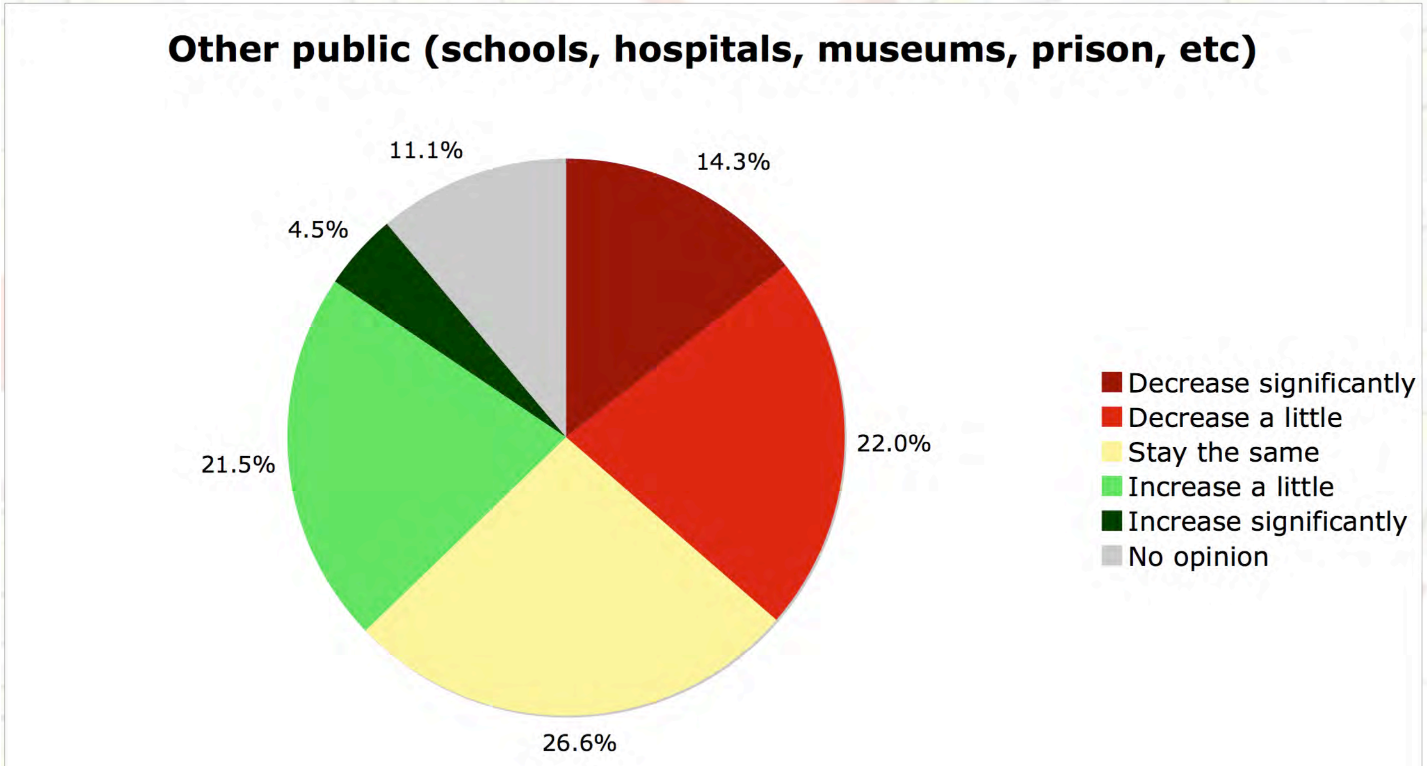

	Pessimistic	Optimistic
April	42.18%	14.58%
June	41.34%	23.56%
September	36.29%	26.02%

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

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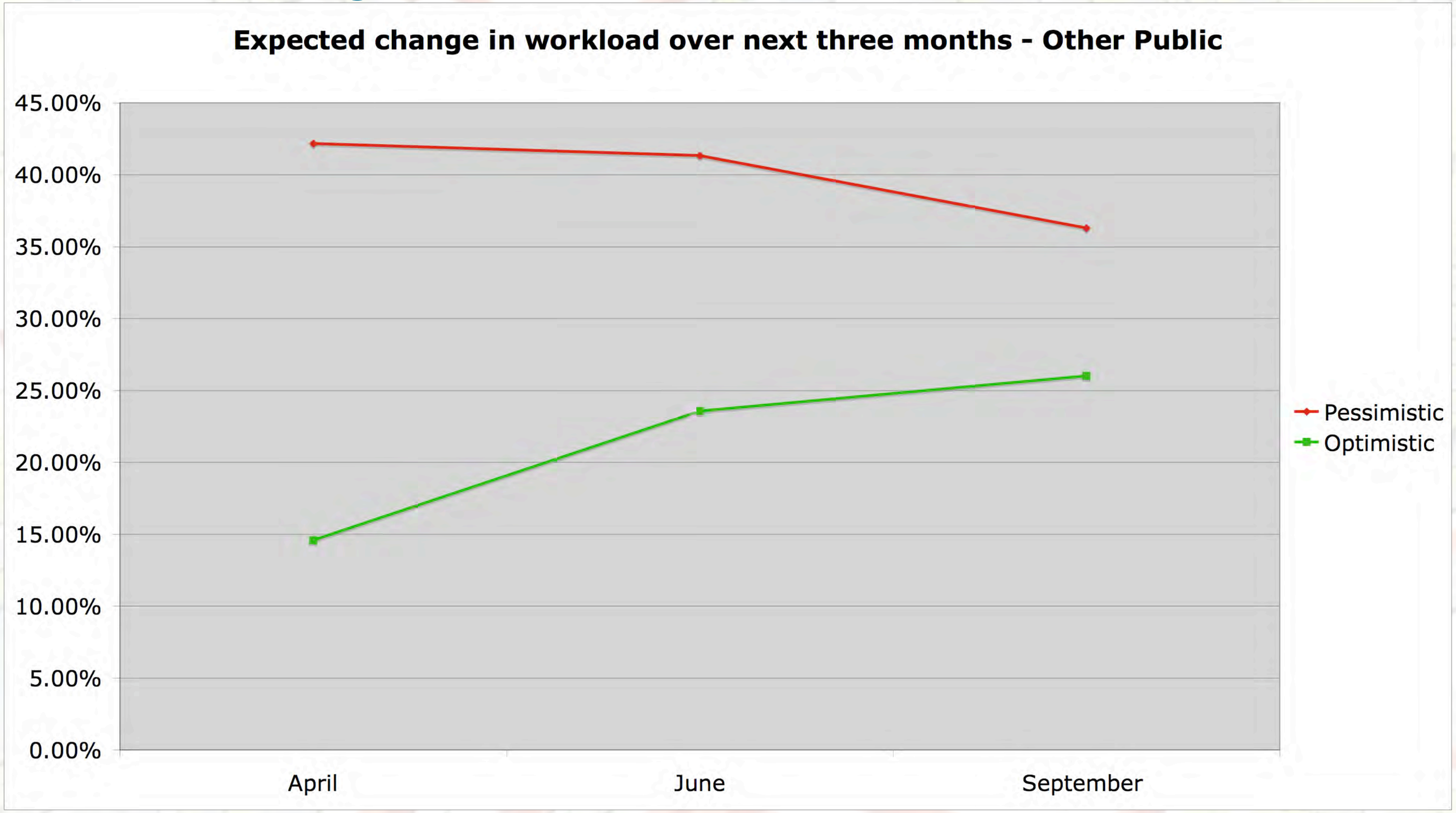
Expected Change in Workload Over Next 3 Months:



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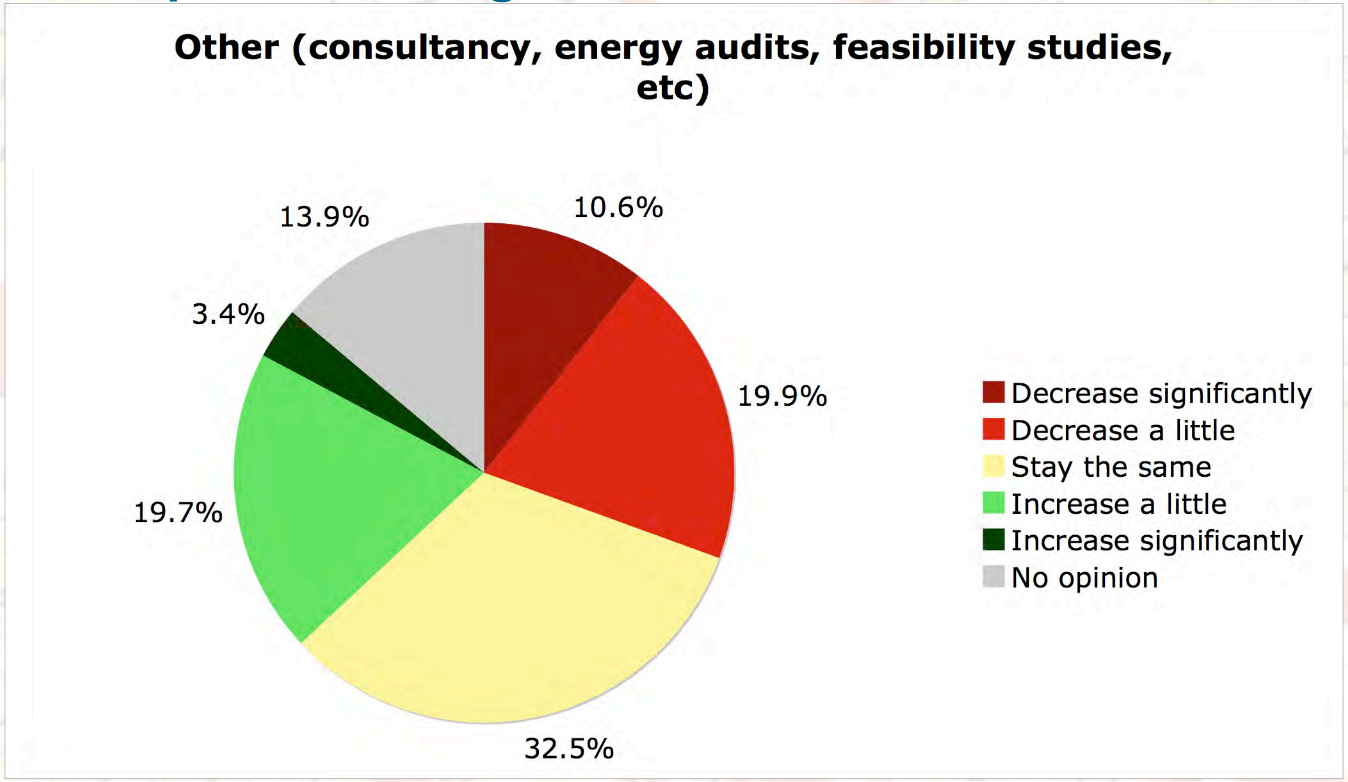

	Pessimistic	Optimistic
April	47.38%	16.51%
June	34.05%	24.07%
September	30.47%	23.14%

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

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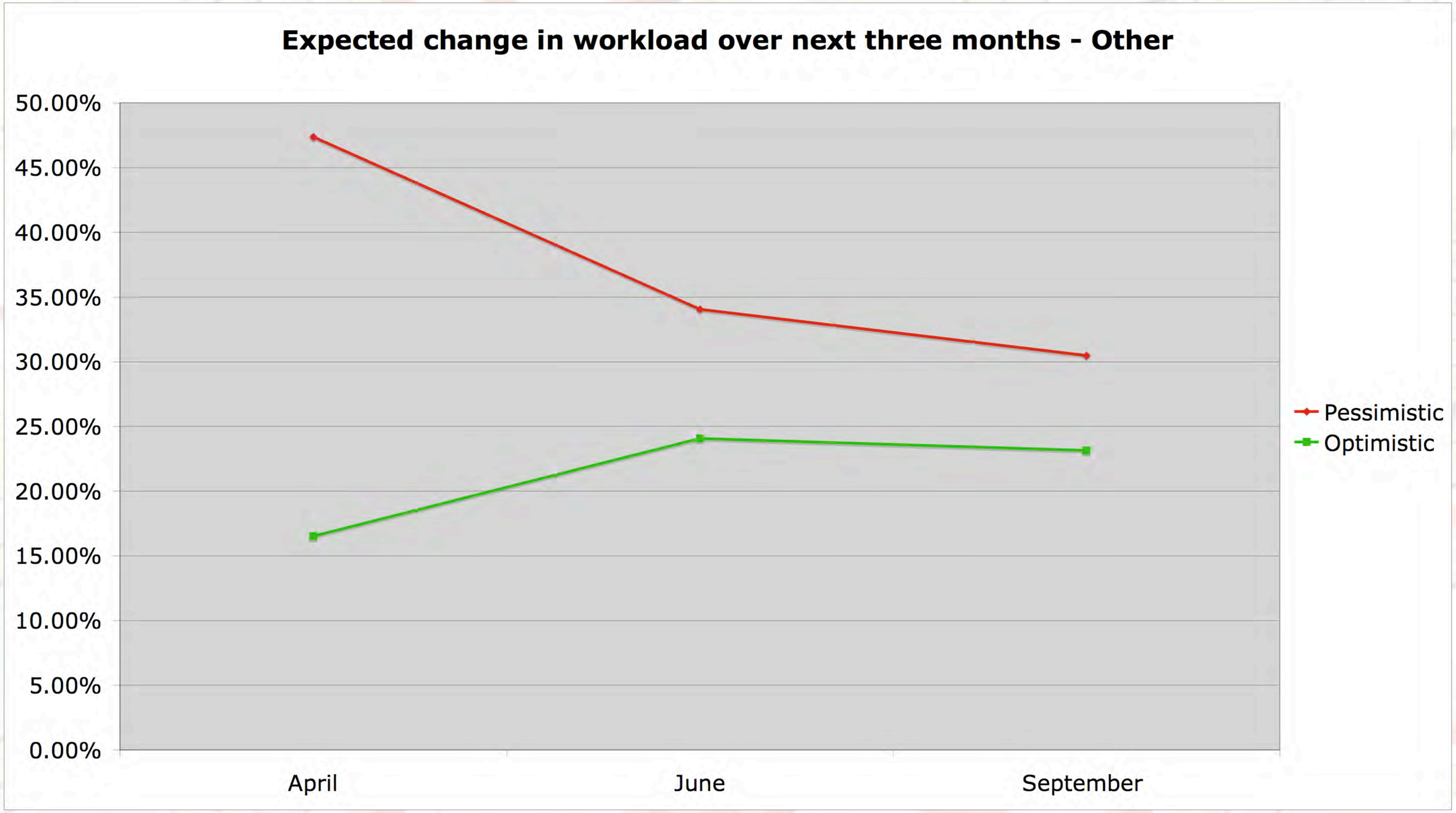
Expected Change in Workload Over Next 3 Months:



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Conclusions:

- Important to continue to repeat the survey every 3 months
- The architectural profession continues to be badly affected by the economic downturn

- The opinions expressed and shown in this presentation indicate that the situation for the architectural profession has not worsened in the three months from June to September 2009
- In fact there is more optimism as the year progresses but, given the time lag for effects to filter through the sector, it may be that the worst is still ahead