ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

11th Economic Trends Survey of the Impact of Economic Downturn

August 2013

11th Economic Trends Survey – August 2013

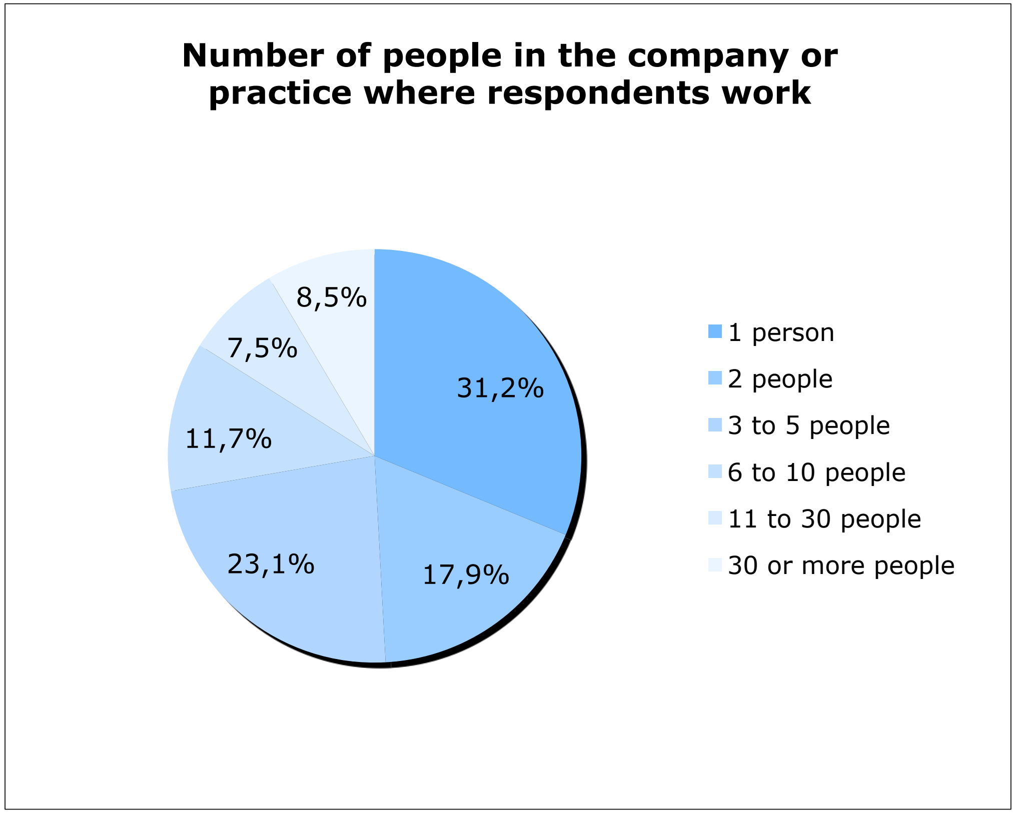
Breakdown of responses

COUNTRY	ANSWERS
Austria	155
Belgium	133
Bulgaria	192
Croatia	185
Cyprus	1
Czech Republic	29
Denmark	29
Estonia	32
Finland	14
France	908
FYROM	1
Germany	30
Greece	191
Hungary	8
Irlande	48
Italy	272
Latvia	44
Lithuania	1
Luxembourg	9
Malta	21
Netherlands	24
Norway	5
Poland	9
Portugal	162
Romania	108
Slovakia	1
Slovenia	10
Spain	55
Sweden	46
Switzerland	7
Turkey	412
United Kingdom	89

3.231 architects have responded to the questionnaire.

Warning: Some of these answers were not included in the overall results due to the fact that they were not sufficiently representative in relation to the number of architects (see countries are highlighted in grey).

Profile of respondents



All sizes of architectural practice are well represented.

The distribution is similar to the previous surveys.

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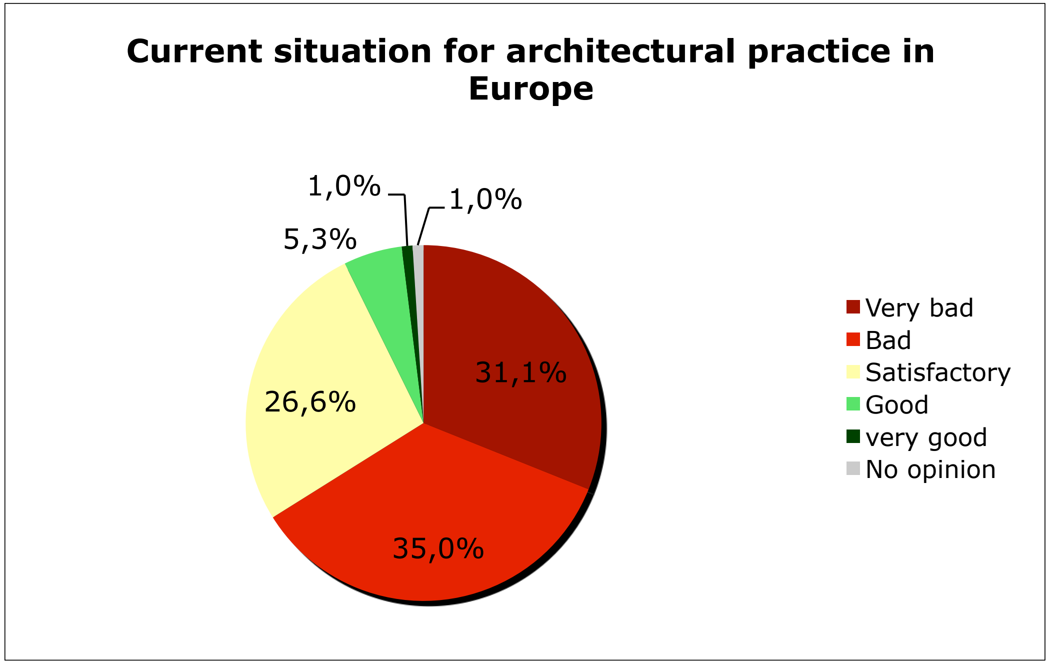

As in previous surveys, global levels of optimism remain very low: only 6.3% of respondents declared themselves optimistic, compared with 66% declaring themselves pessimistic.

	Pessimistic	Optimistic
April 2009	65,16%	8,41%
January 2010	58,40%	15,10%
January 2011	53,70%	14,00%
January 2012	51,40%	13,70%
January 2013	62,60%	9,10%
August 2013	66,10%	6,30%

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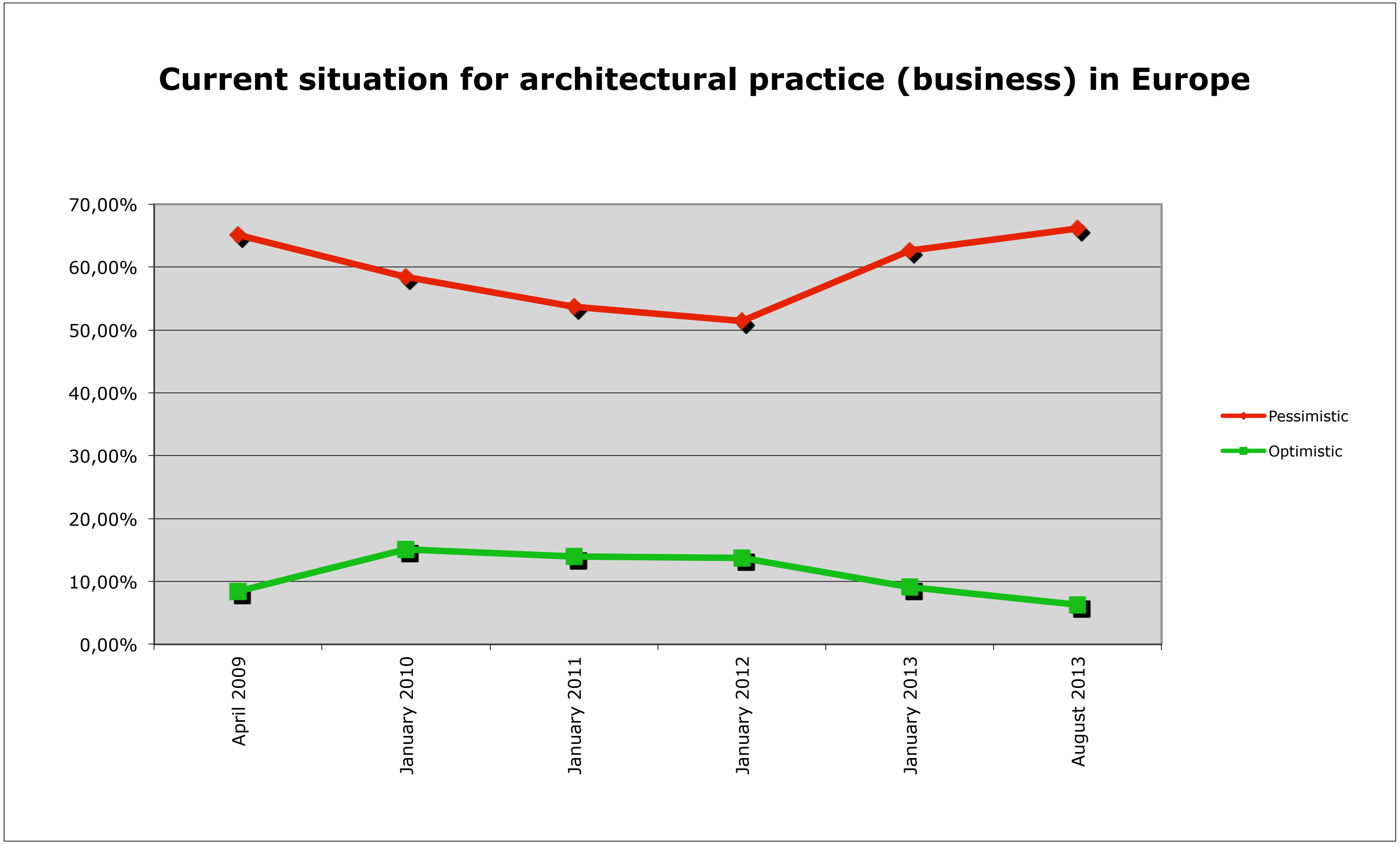

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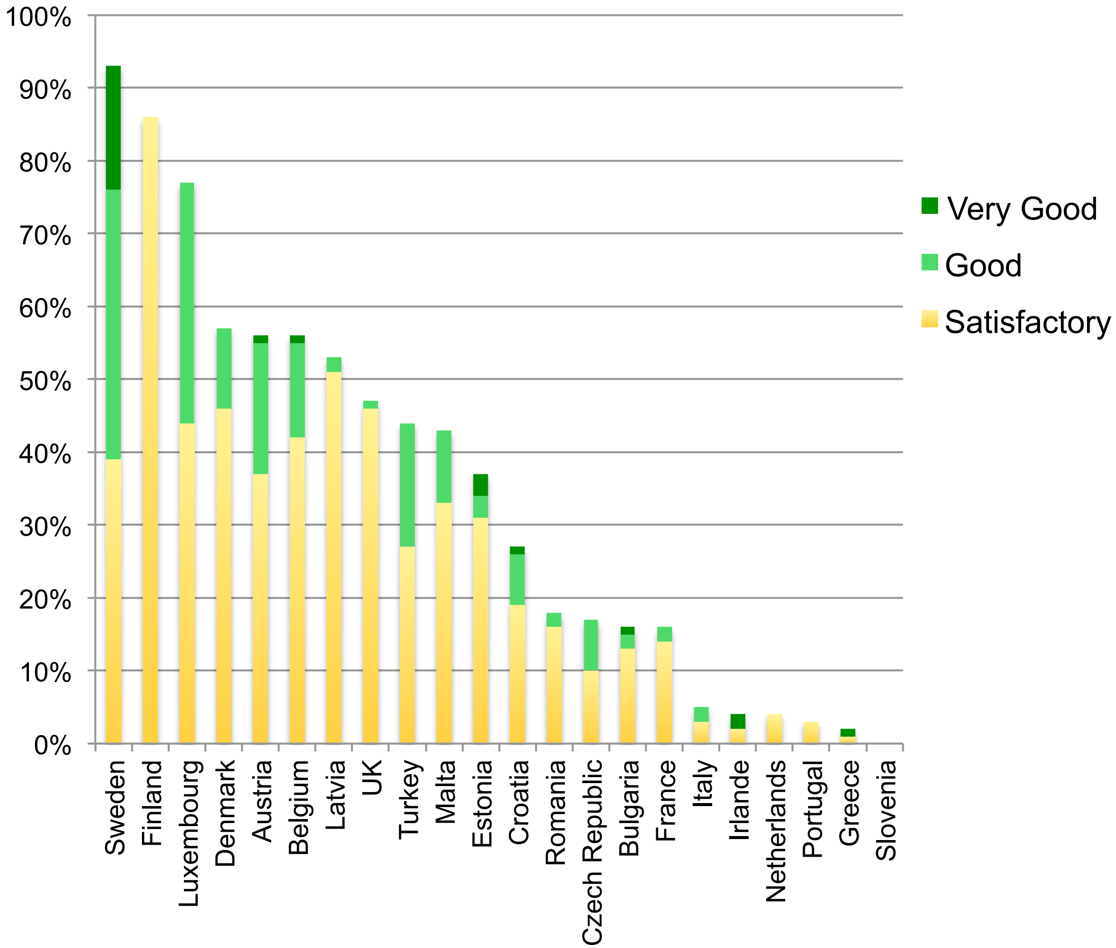
Persons judging the architectural market in their country to be satisfactory, good or very good



The breakdown by country reveals that the appraisal of the situation differs significantly from one country to another.

Northern Europe, headed by Sweden and Finland, is clearly more confident and satisfied than the rest of Europe.

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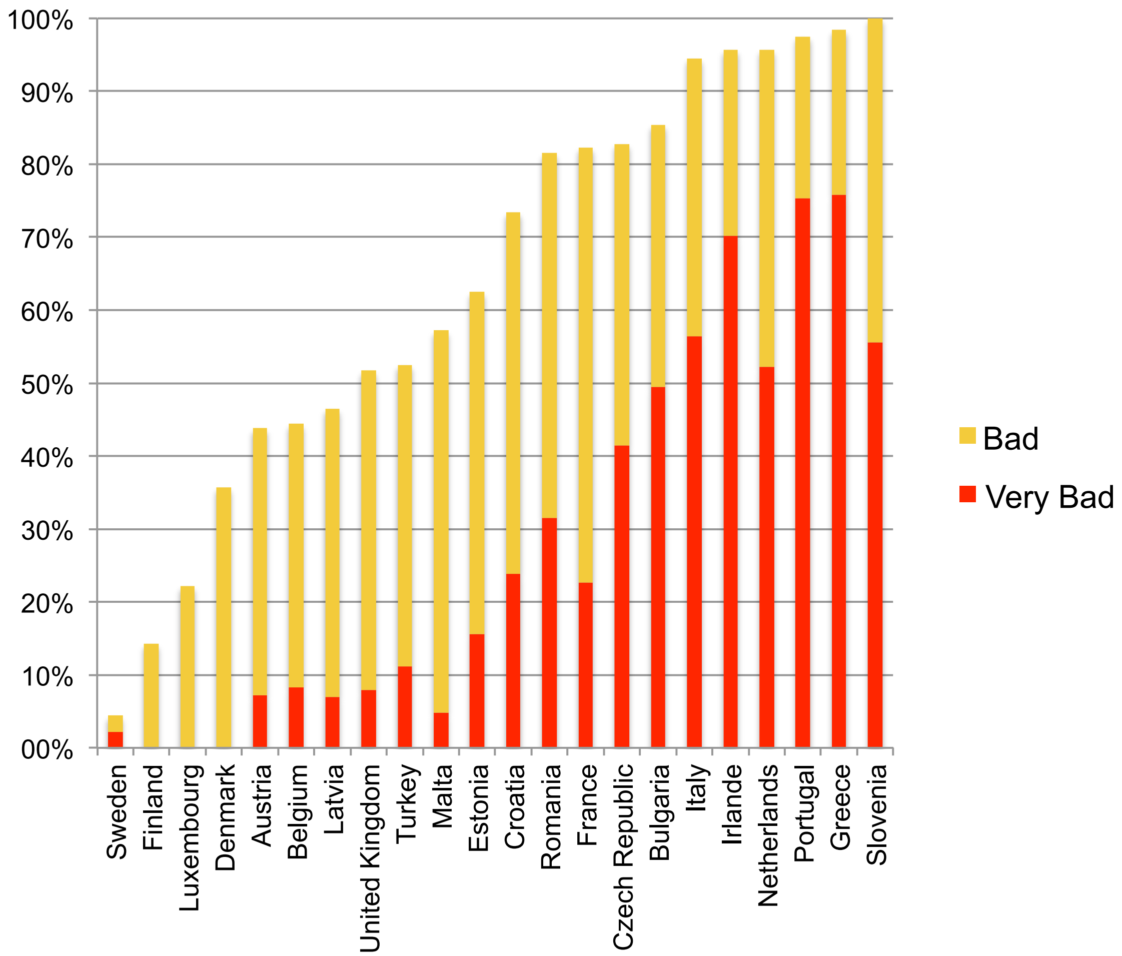
Persons judging the architectural market in their country to be bad or very bad



On the other hand, the situation seems to remain at an impasse in Southern and Central Europe, where a majority of respondents judged the situation bad or very bad.

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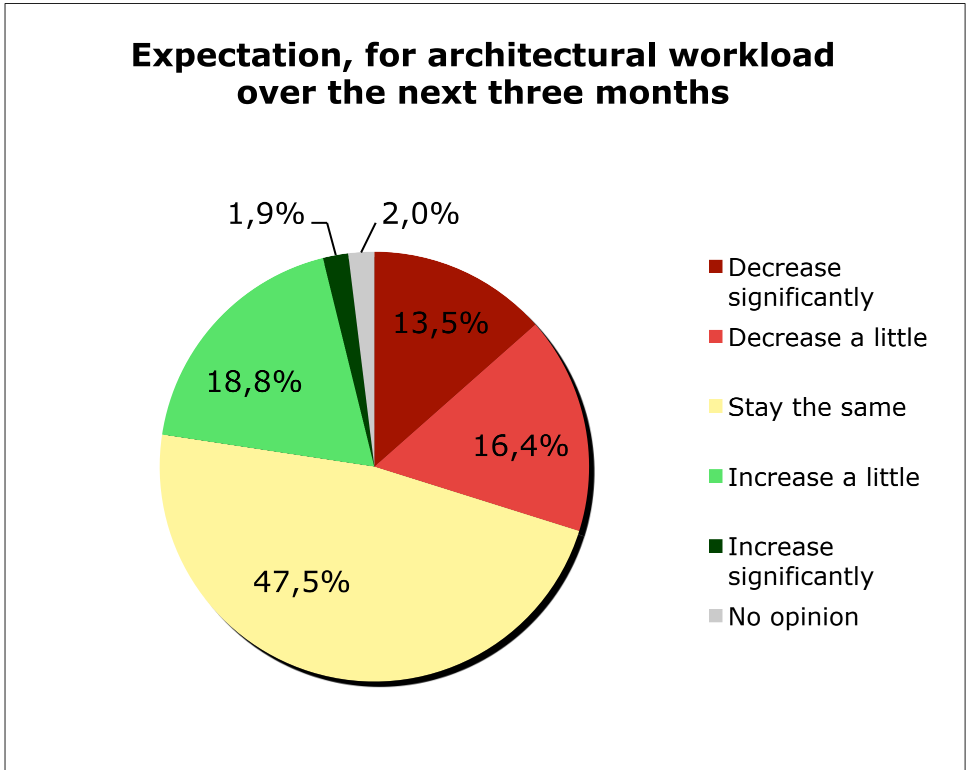

	Decrease	Increase
April 2009	48,47%	13,09%
January 2010	32,80%	22,40%
January 2011	32,80%	27,60%
January 2012	35,20%	22,10%
January 2013	34,10%	22,10%
August 2013	29,80%	20,70%

Workload forecasts for the next three months are stable: almost half of the respondents did not expect a change while one fifth even expected an increase.

Compared with the beginning of the year, respondents expecting a decrease in their workload have reduced from 34,1% to 29,8%.

The breakdown by building type comes later in the presentation.

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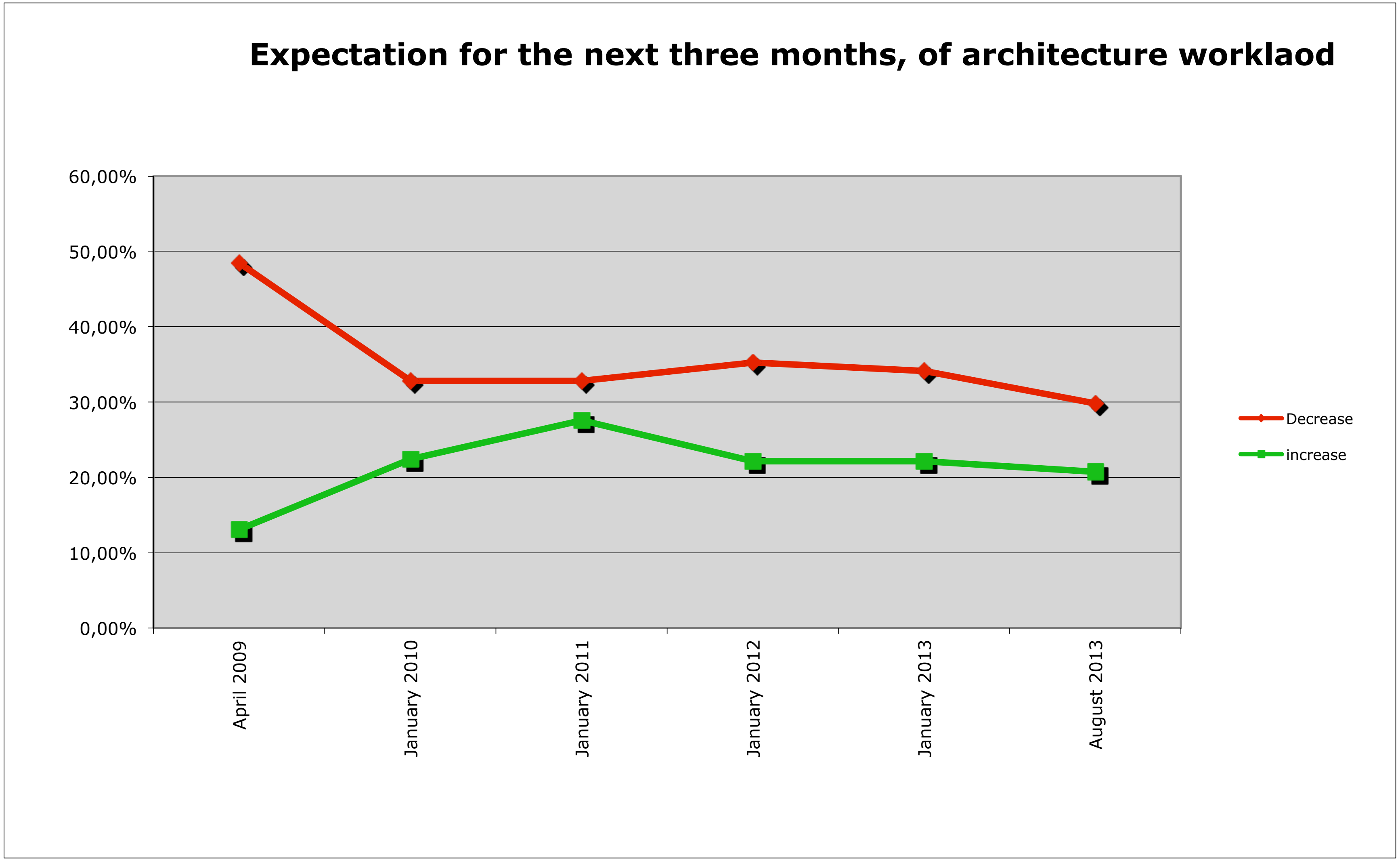

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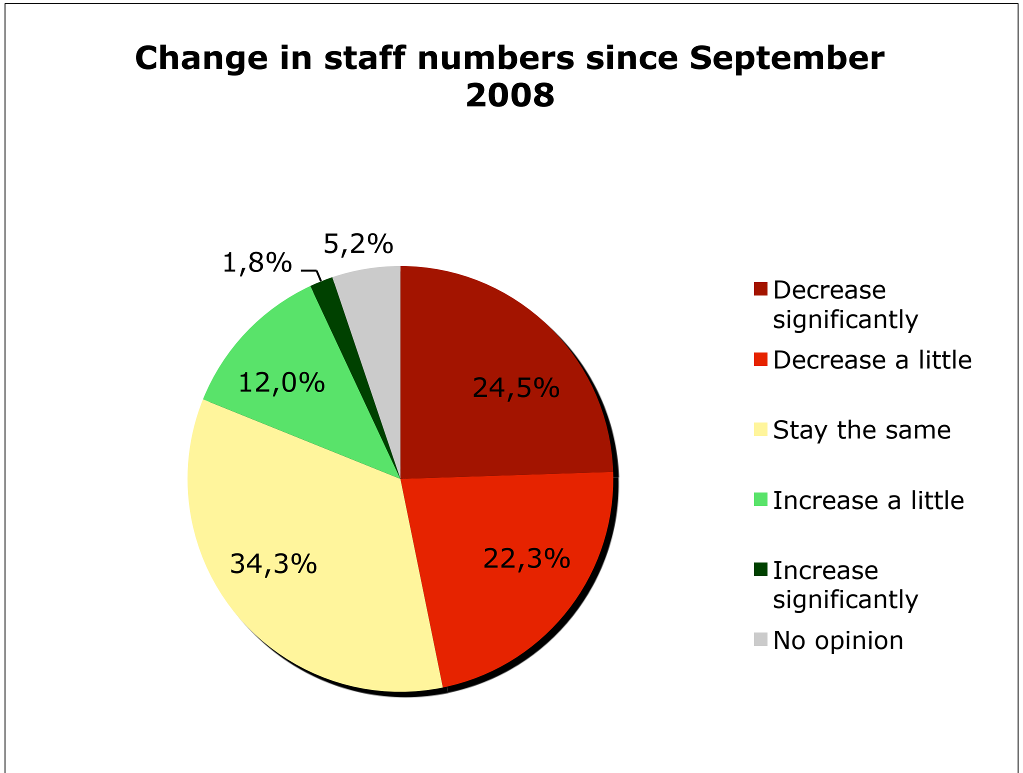
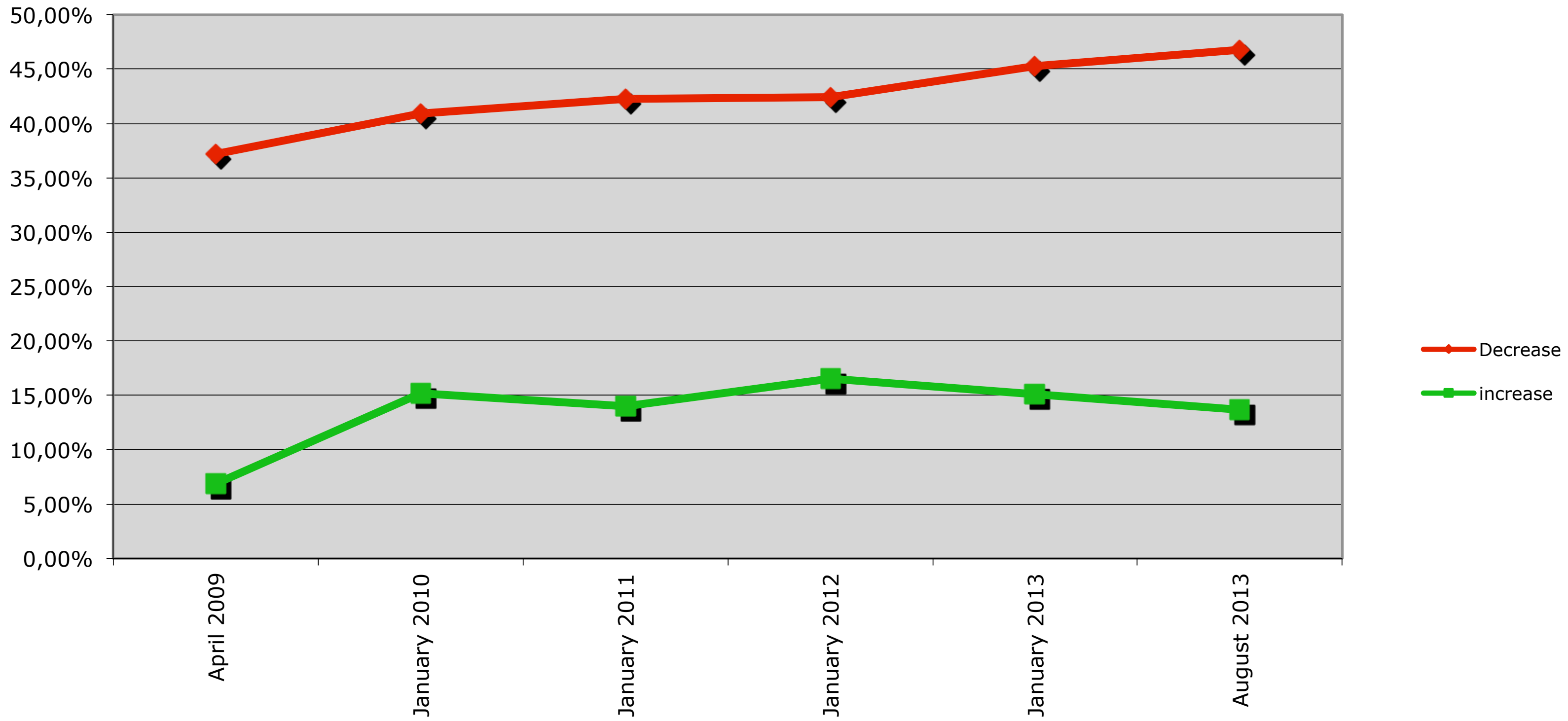


This result indicates that almost 1 in 2 offices has seen a decrease in staff numbers since the start of the downturn.

	Decrease	Increase
April 2009	37,18%	6,85%
January 2010	40,90%	15,20%
January 2011	42,30%	14,00%
January 2012	42,40%	16,50%
January 2013	45,30%	15,10%
August 2013	46,80%	13,70%

Change in staff numbers since September 2008



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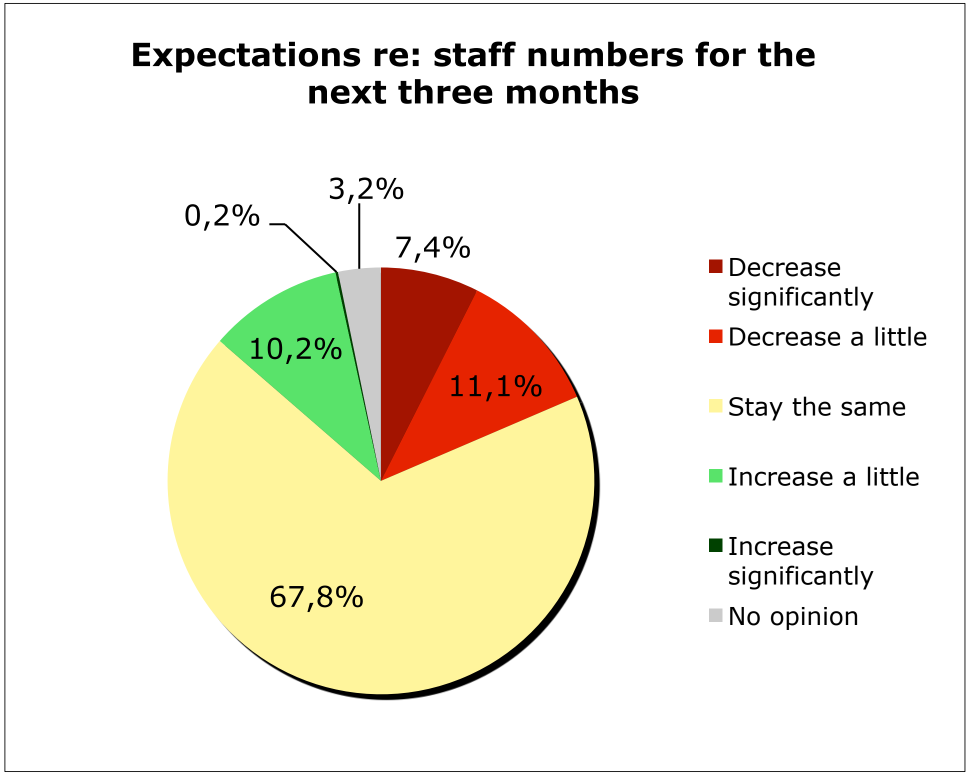

	Decrease	Increase
April 2009	32,35%	6,15%
January 2010	17,00%	13,20%
January 2011	15,00%	17,80%
January 2012	16,20%	10,10%
January 2013	20,80%	12,60%
August 2013	18,60%	10,40%

As in the previous surveys, a large majority of respondents did not expect any change in staff numbers for next three months (67,8%).

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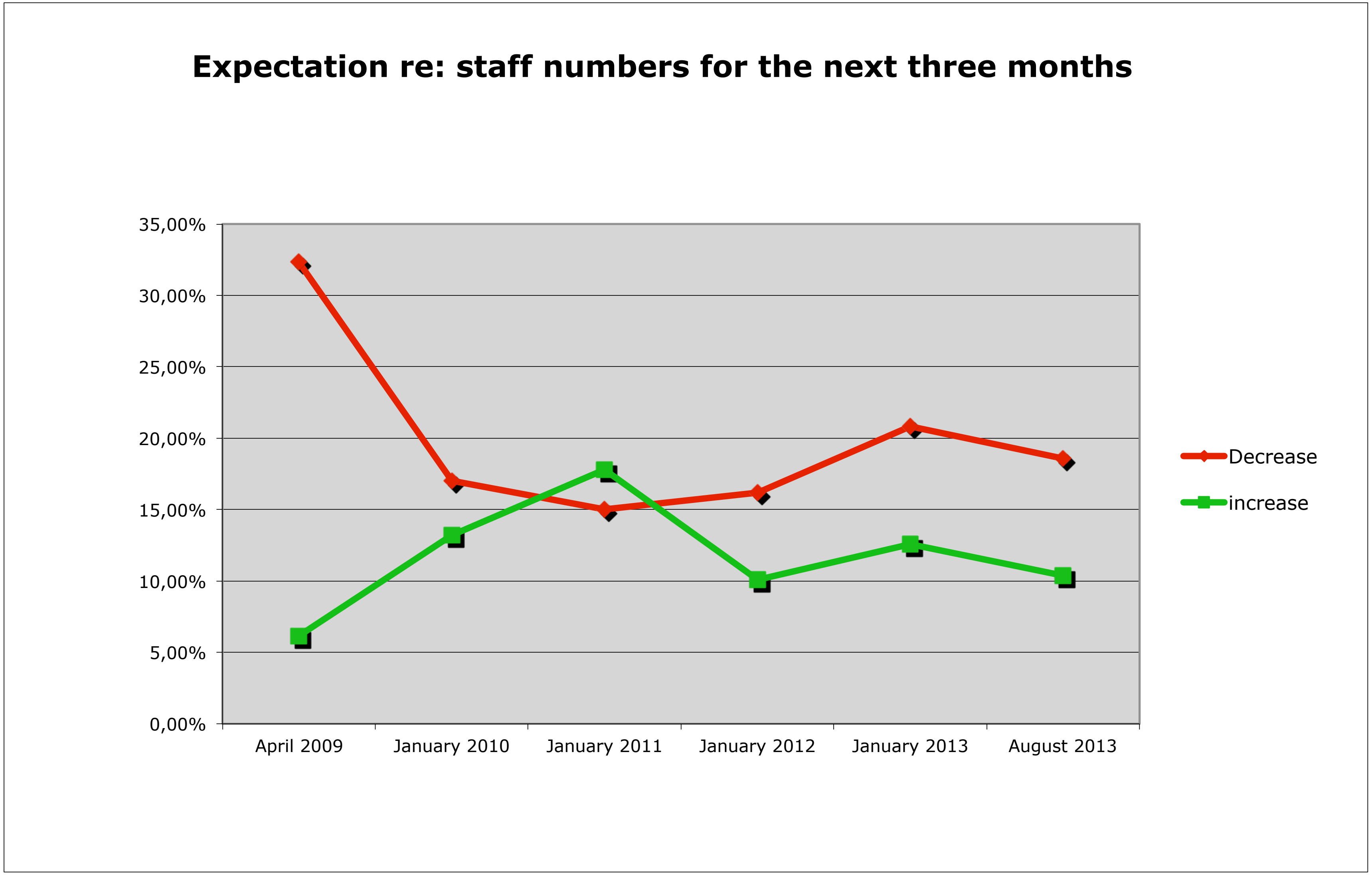

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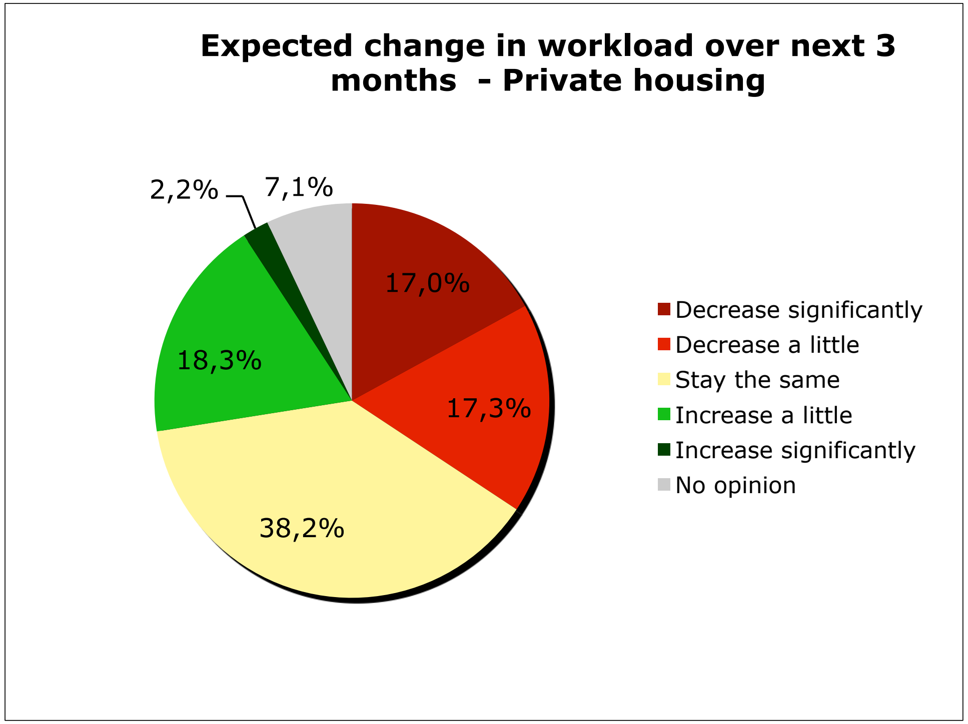

	Decrease	Increase
April 2009	67,04%	10,44%
January 2010	47,30%	15,70%
January 2011	34,00%	26,20%
January 2012	35,10%	20,10%
January 2013	43,00%	16,10%
August 2013	34,30%	20,50%

In comparison with the beginning of the year, the number of respondents expecting a decrease in workload for private housing declined significantly (34% in August as compared with 43% in January). In August 2013, one fifth is now even expecting an increase in workload for private housing.

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

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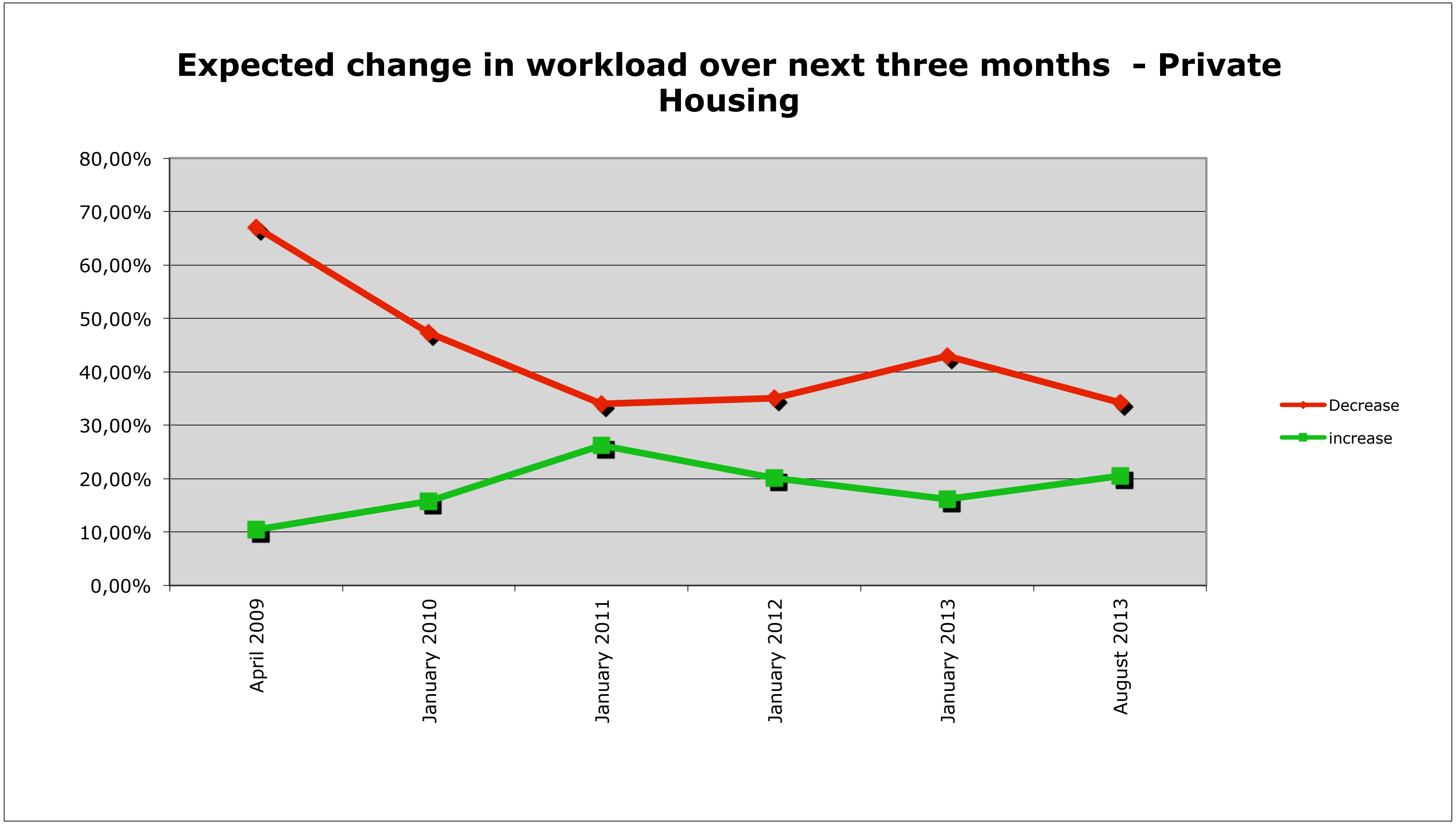

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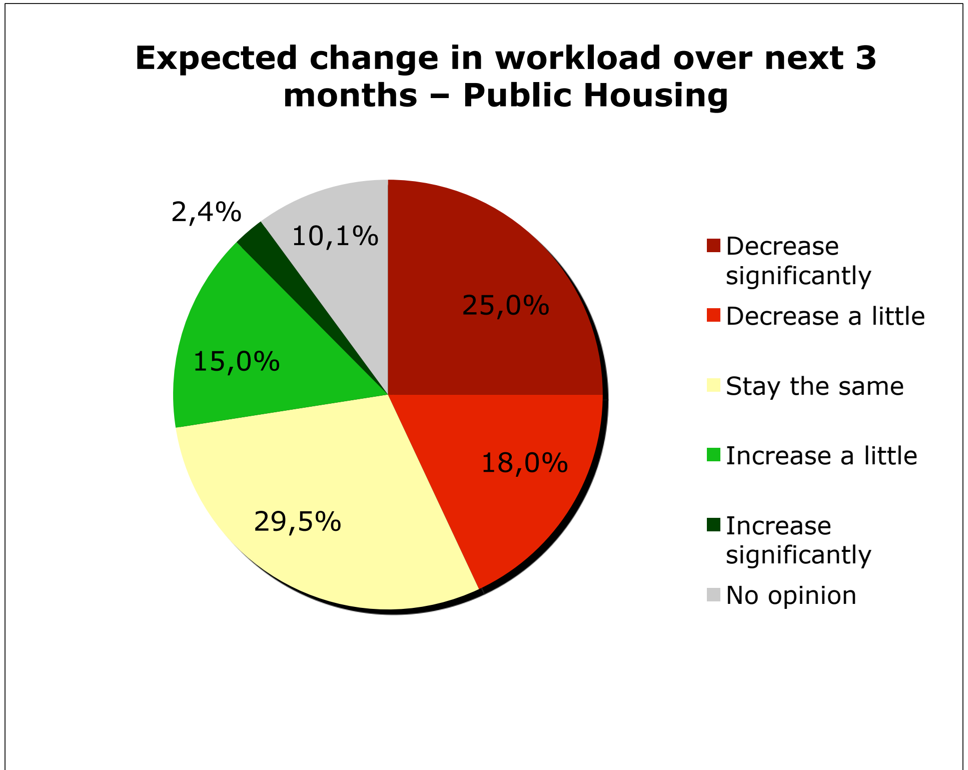

	Decrease	Increase
April 2009	59,78%	9,73%
January 2010	48,30%	9,80%
January 2011	43,00%	20,30%
January 2012	43,80%	10,20%
January 2013	41,90%	16,80%
August 2013	43,00%	17,40%

Compared with the beginning of the year, workload forecasts for public housing remain stable: almost 30% expect no change, whereas more than 40% expect a decrease in workload.

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

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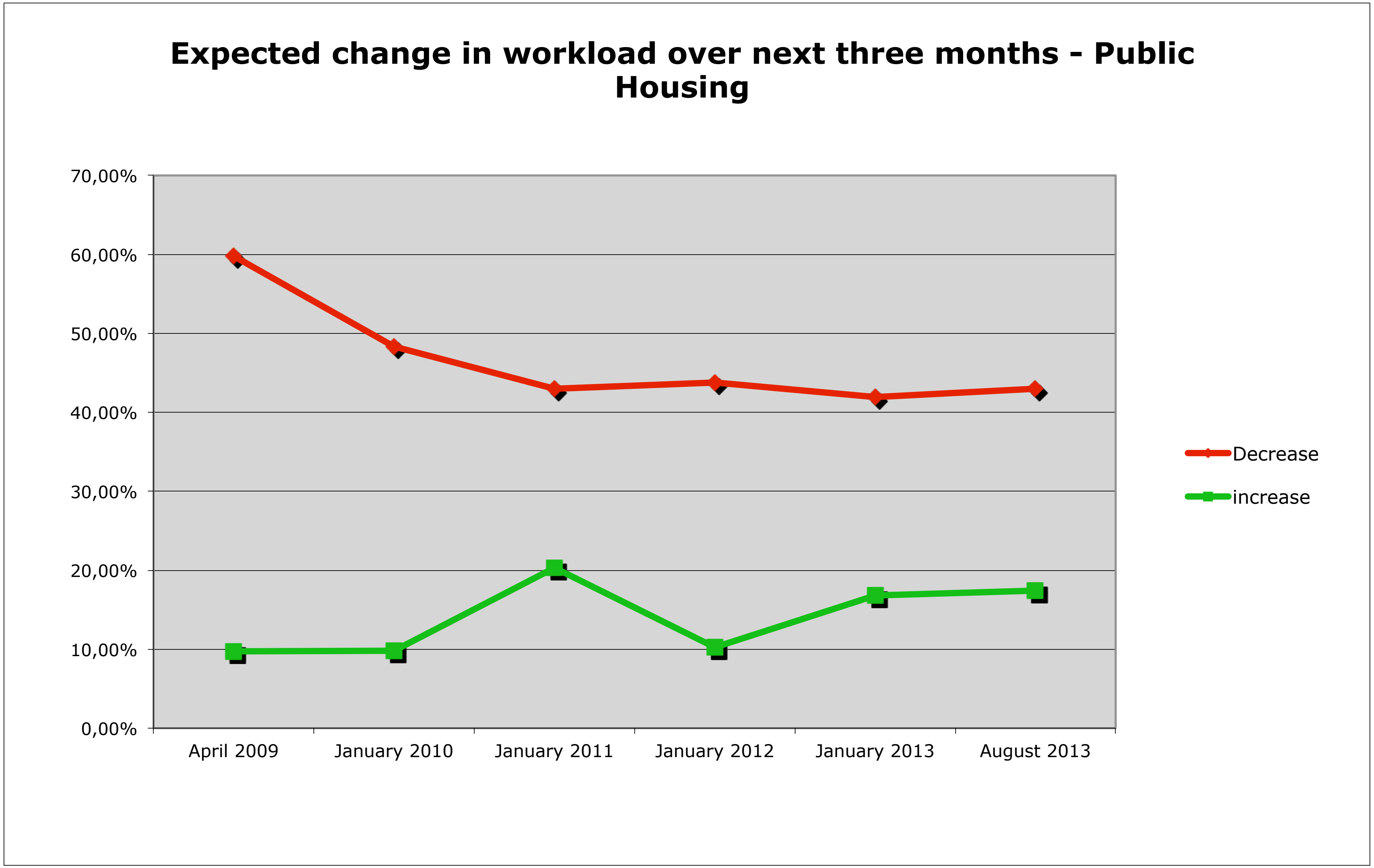

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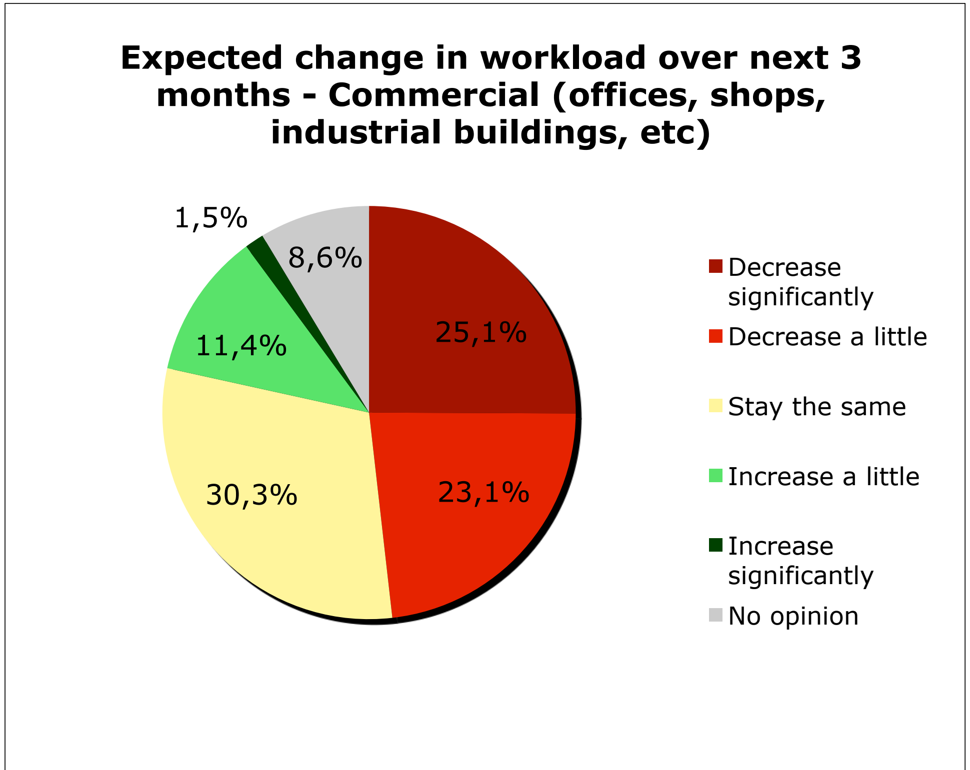

	Decrease	Increase
April 2009	76,19%	5,18%
January 2010	57,80%	9,50%
January 2011	40,10%	20,60%
January 2012	50,80%	10,20%
January 2013	49,40%	13,30%
August 2013	48,20%	12,90%

Compared with January 2013, workload forecasts for commercial projects remain stable: almost half of respondents expect a decrease in workload, compared with 13% expecting to see an increase.

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

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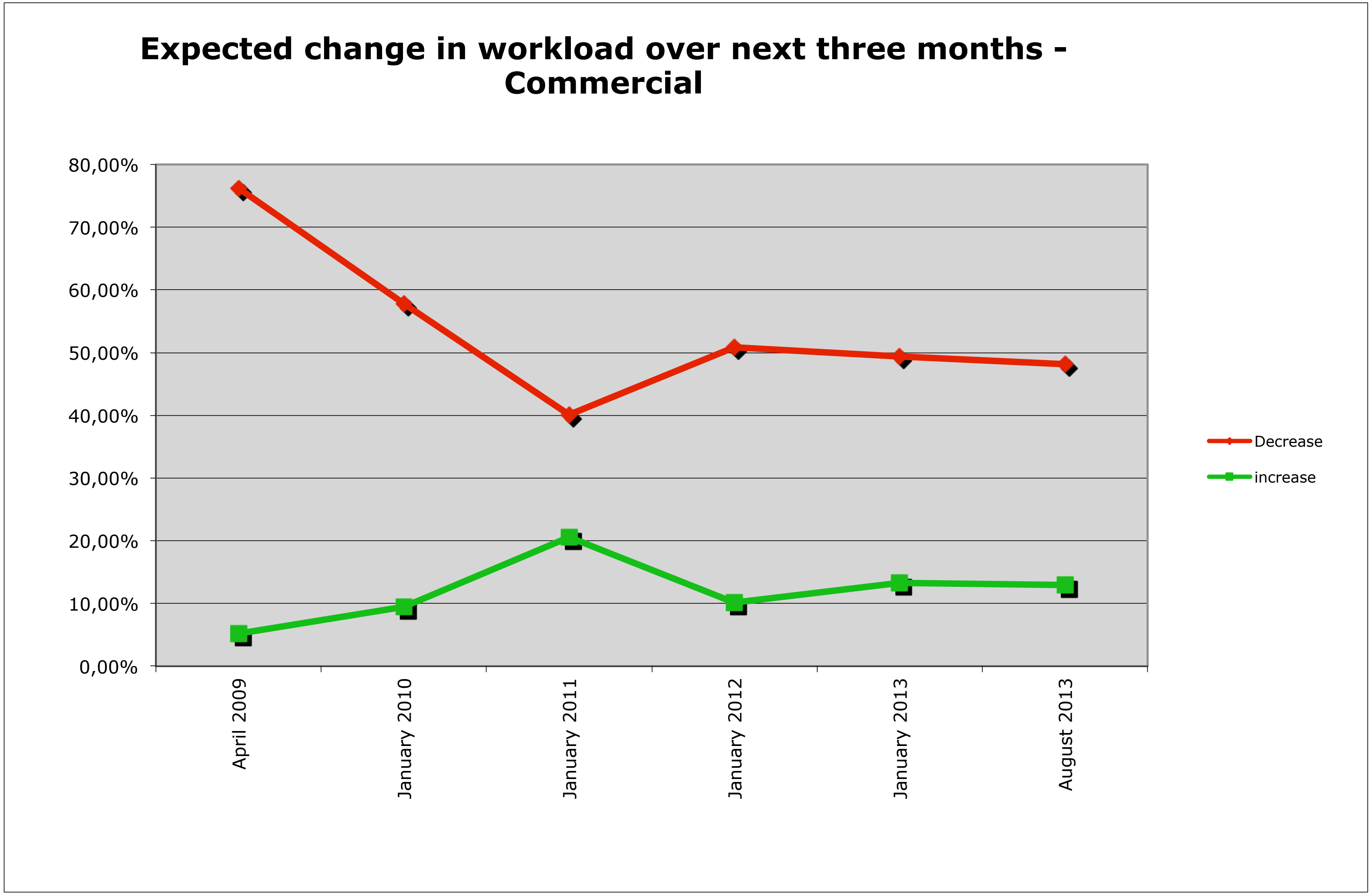

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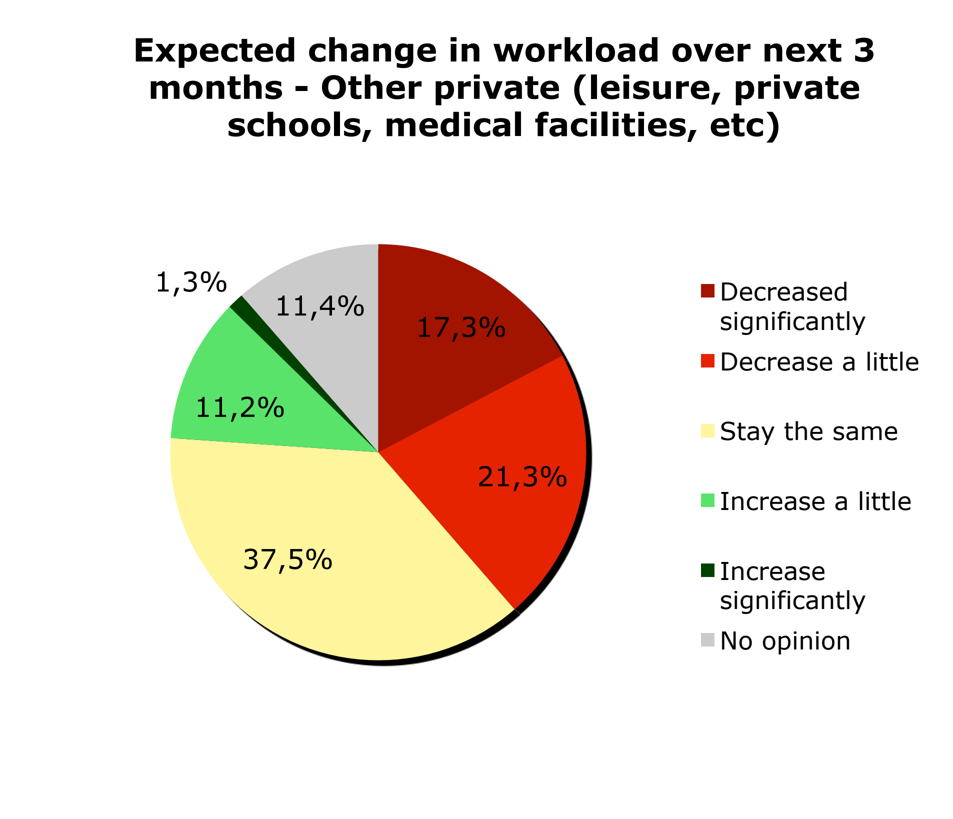

	Decrease	Increase
April 2009	62,07%	3,12%
January 2010	48,50%	11,40%
January 2011	35,40%	13,90%
January 2012	40,50%	10,30%
January 2013	42,90%	10,00%
August 2013	38,60%	12,50%

Results show a slight improvement in the workload forecasts for other private projects: 38,6% of respondents expect a decrease in workload (compared with 43% in January), and 12,5% expecting to see an increase (compared with 10% in January).

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

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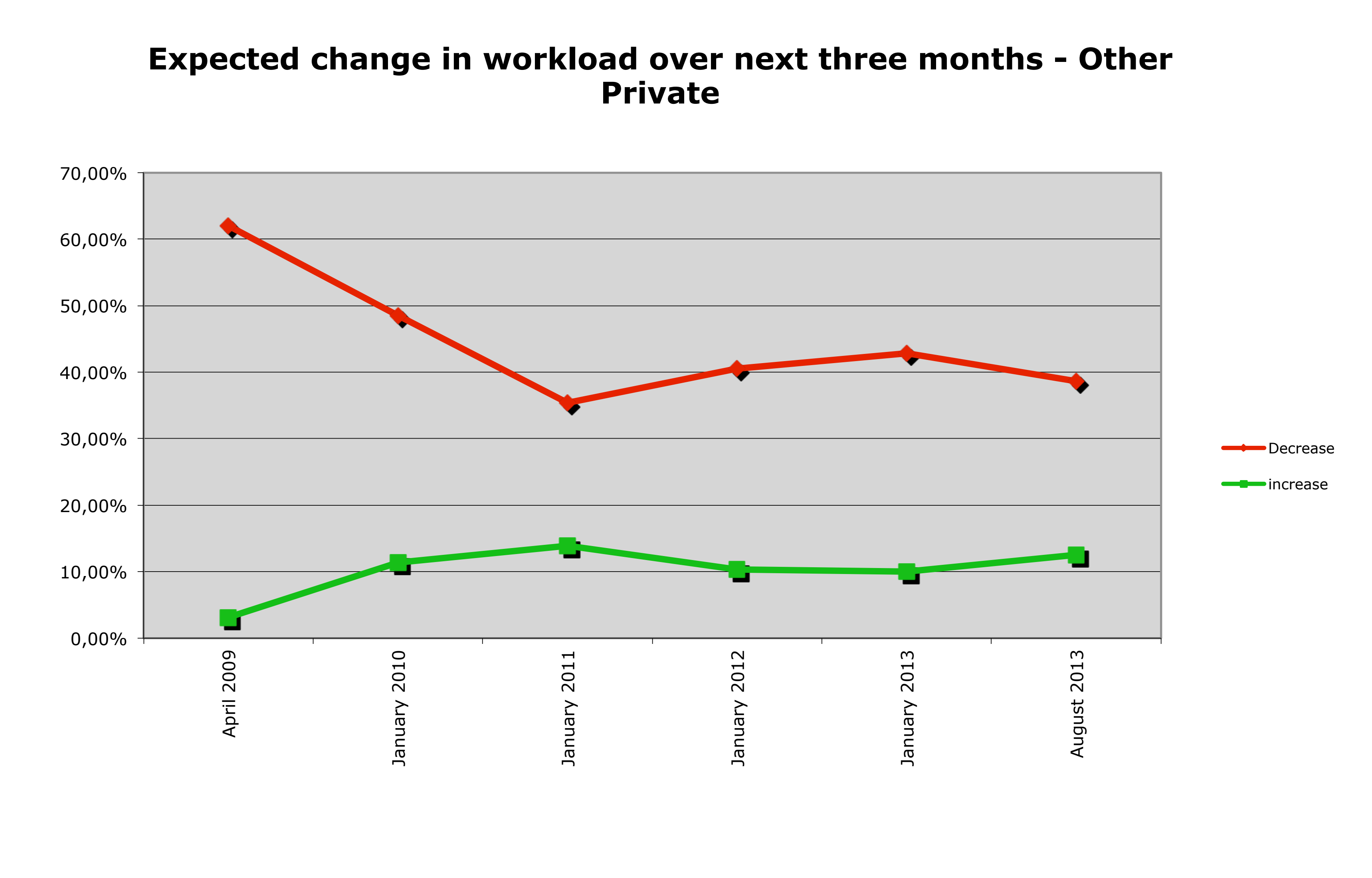

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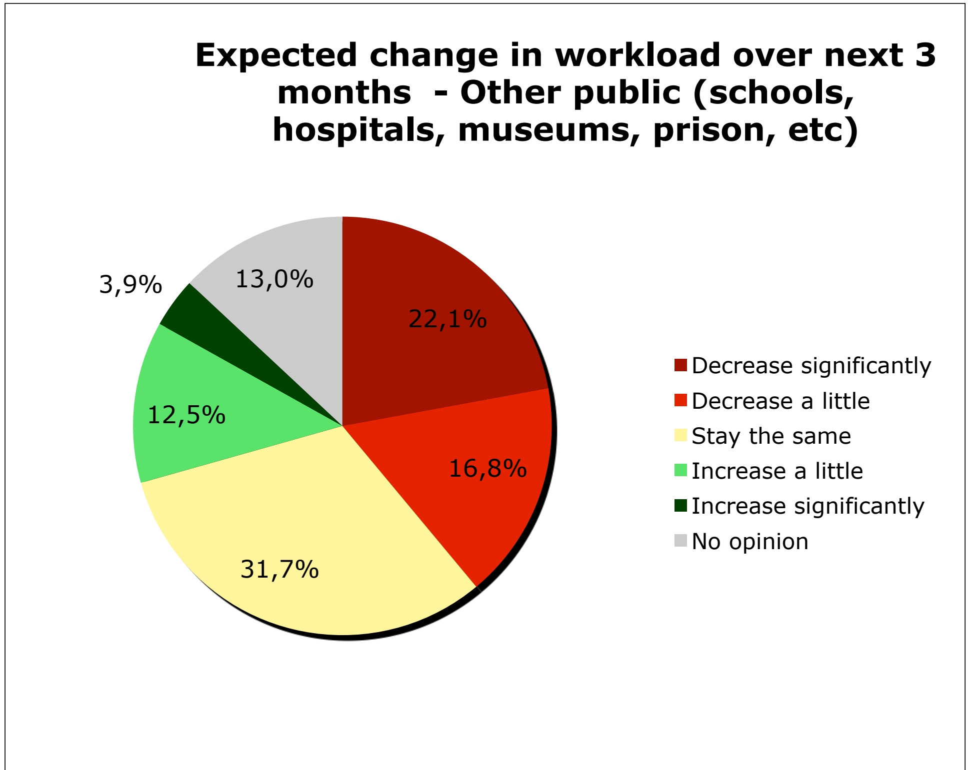

Results show a slight improvement in the workload forecasts for other public projects: 39% of respondents expect a decrease in workload (compared with 46,5% in January) and 16,3% now expect to see an increase.

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

	Decrease	Increase
April 2009	42,18%	14,58%
January 2010	41,40%	16,30%
January 2011	38,10%	20,10%
January 2012	44,30%	14,90%
January 2013	46,50%	17,10%
August 2013	39,00%	16,30%

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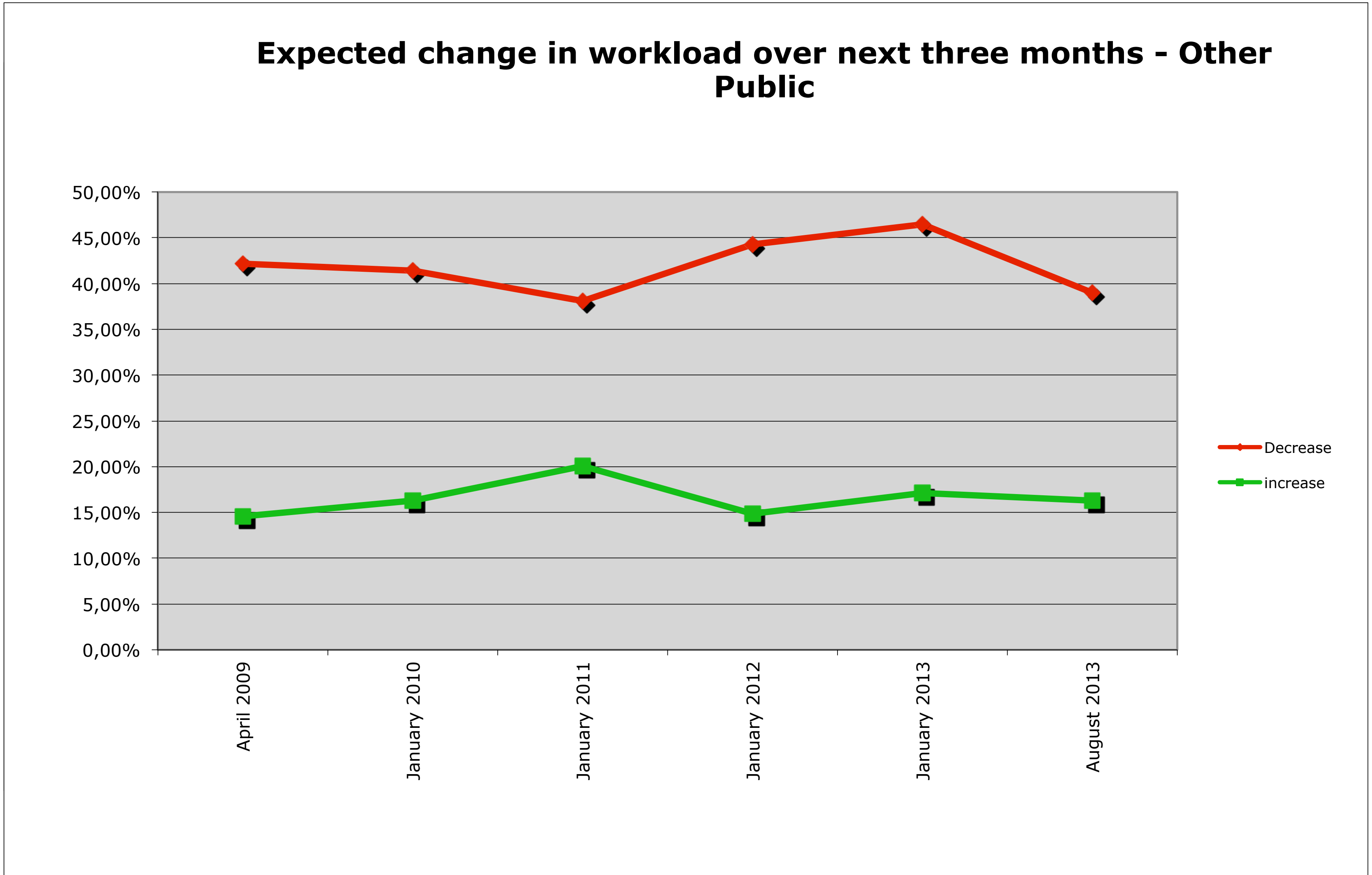

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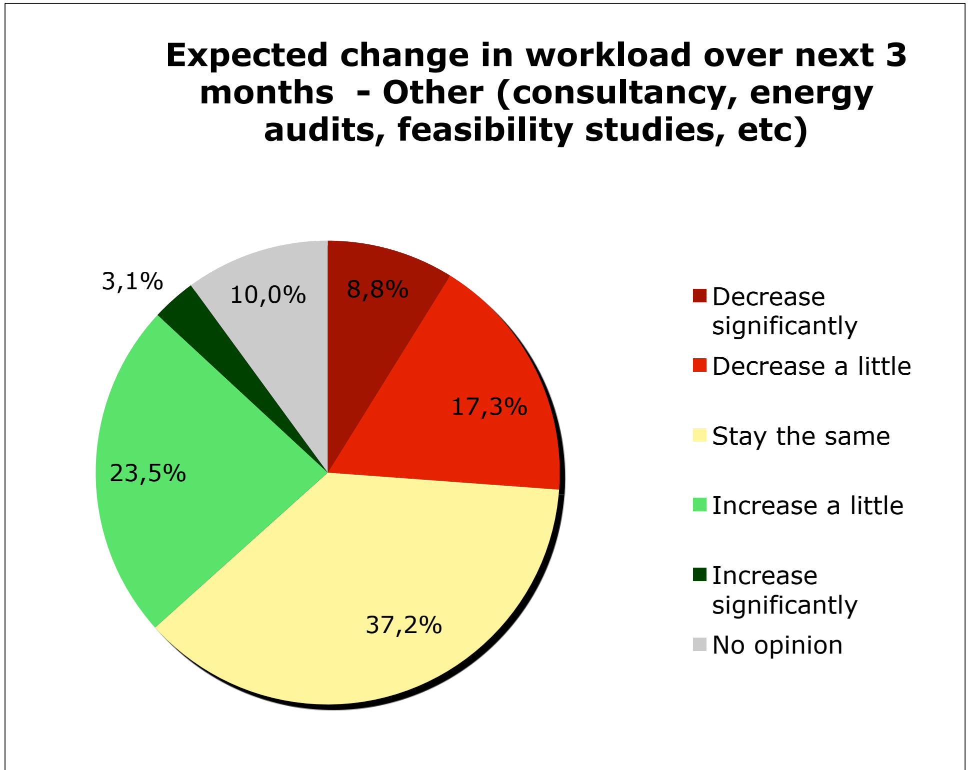

	Decrease	Increase
April 2009	47,38%	16,51%
January 2010	31,60%	28,20%
January 2011	26,00%	36,10%
January 2012	23,90%	31,30%
January 2013	23,30%	31,40%
August 2013	26,20%	26,60%

It is not known what the percentage of the market these tasks represent for architects, but it remains the area that is the least pessimistic about future workload.

In August 2013, approximately the same number of respondents expect an increase as those expecting a decrease (around one quarter).

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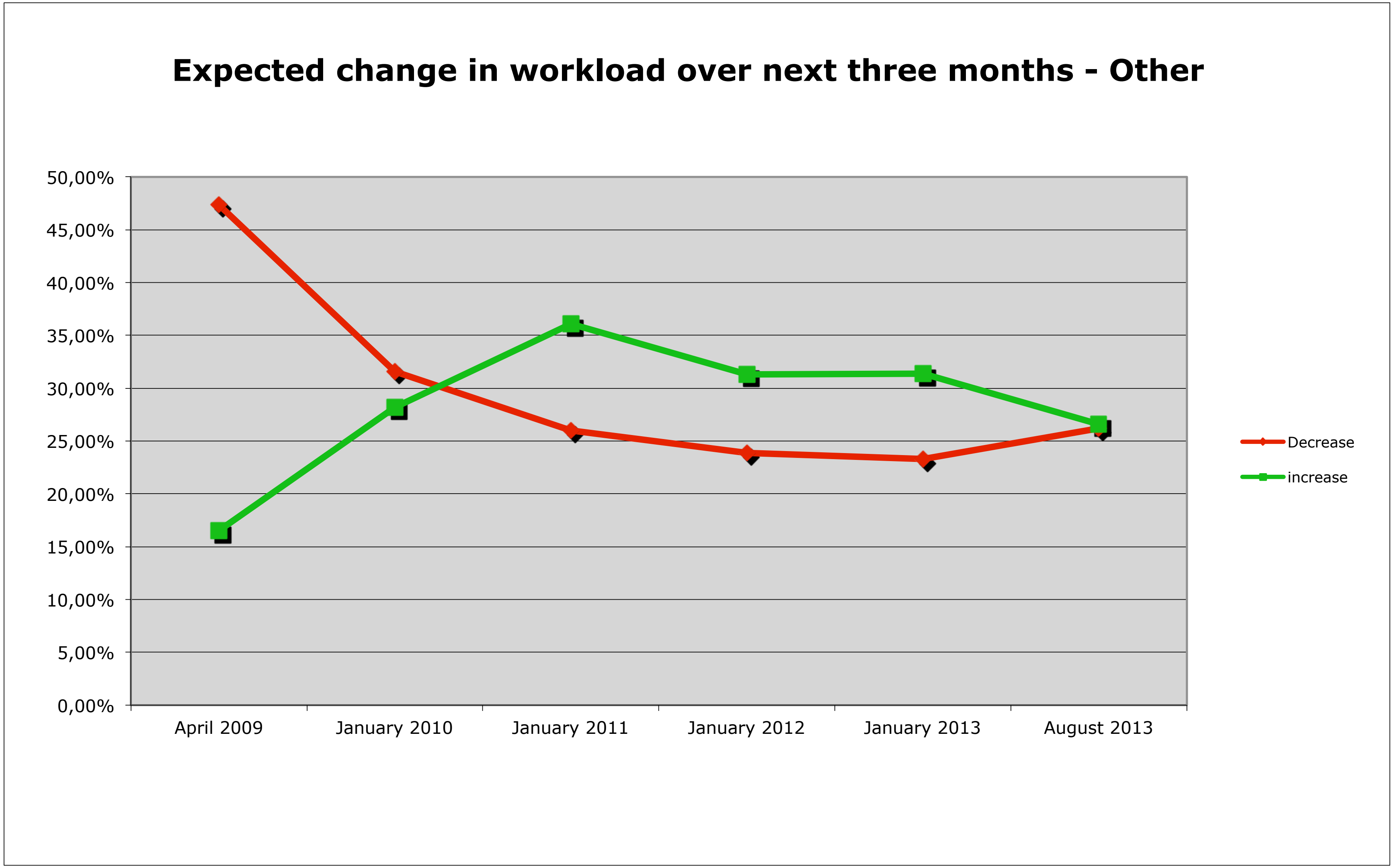

CONCLUSIONS

- **The general mood among the profession remains pessimistic, while the architectural market is likely to remain at a standstill in the coming months.**

- **However, the situation differs from one country to another: countries of Northern Europe are more confident than those of Southern and Central Europe.**

- **Moreover, the situation seems to have stabilised and there are some positive trends suggesting possible improvements in the not too distant future: a large majority of respondents expects no change in staff numbers in the short term and a positive trend in the private housing sector is observed.**