ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

JUNE 2009

Second Snapshot Survey Of Impact of Economic Crisis

JUIN 2009

Second Economic Impact Survey June-09

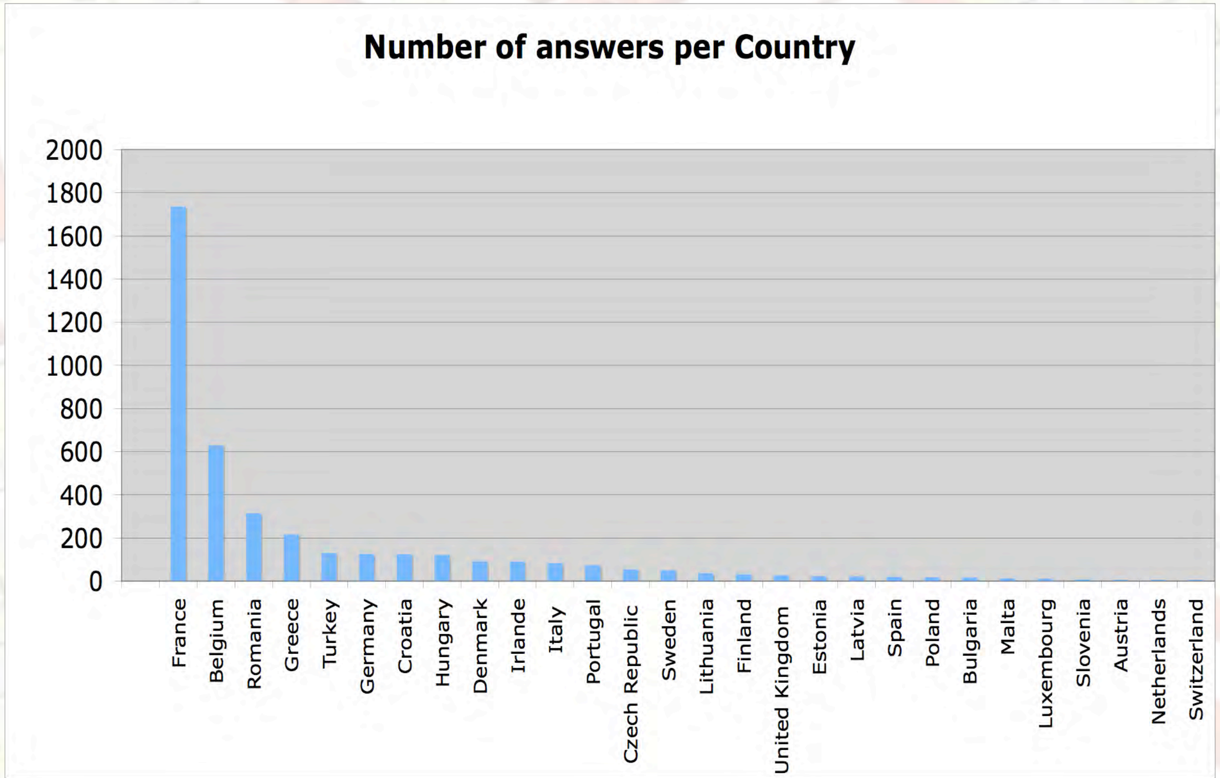
Methodology:

- Secretariat Used the Same Questions as the 1st Survey and the ACE Internet Service Provider Created the Online Questionnaire
- Questions Translated into 14 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 29th June)
- 4,219 Responses Received in Total
- 4,106 Responses from ACE Member Countries

Second Economic Impact Survey June-09

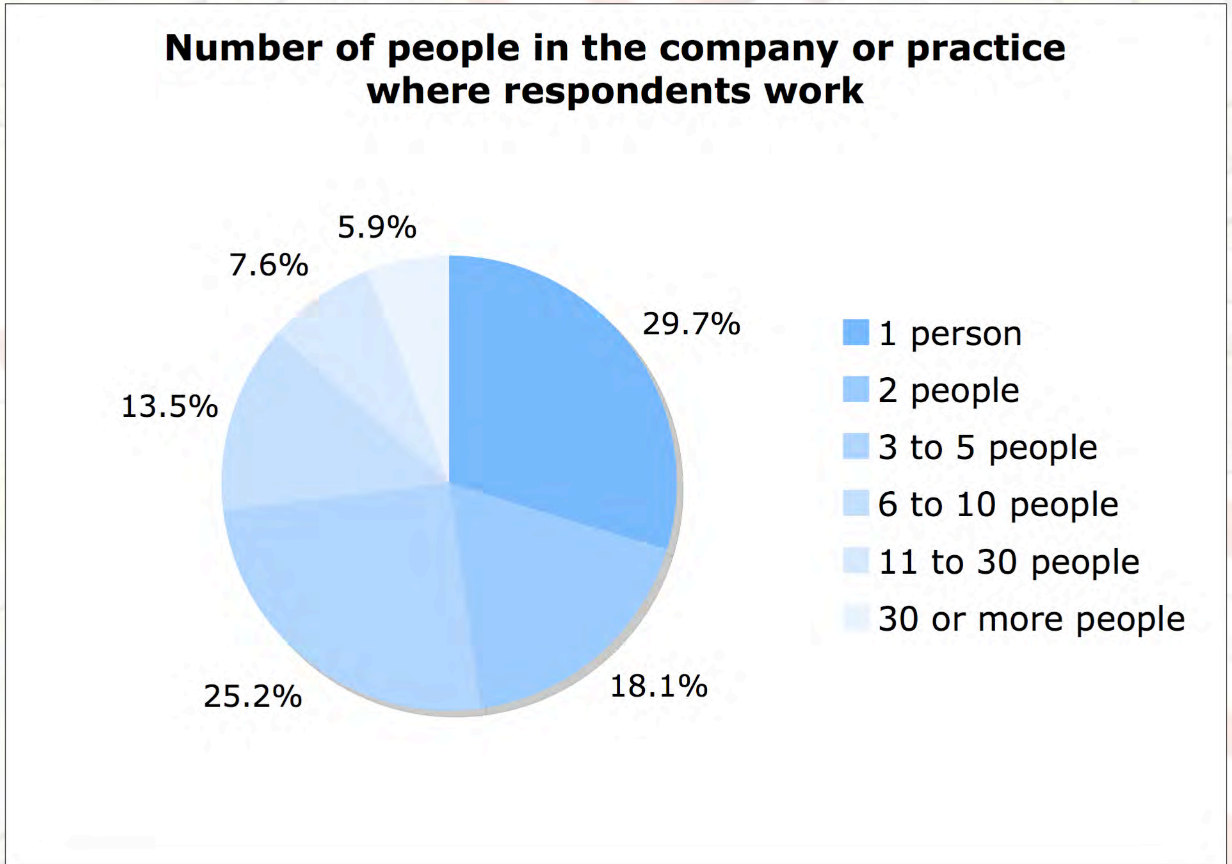
Breakdown of Responses:

Note: This represents twice as many responses as for the first survey in April 2009



Countries	Number of answers
France	1736
Belgium	630
Romania	315
Greece	216
Turkey	130
Germany	127
Croatia	126
Hungary	121
Denmark	92
Irlande	91
Italy	83
Portugal	75
Czech Republic	55
Sweden	51
Lithuania	37
Finland	32
United Kingdom	27
Estonia	23
Latvia	22
Spain	21
Poland	18
Bulgaria	17
Malta	13
Luxembourg	12
Slovenia	9
Austria	7
Netherlands	7
Switzerland	6
Cyprus	3
Norway	2
Bosnie & Herzegovina	2
FYROM	0
Slovakia	0
TOTAL	4106

Profile of Respondents:

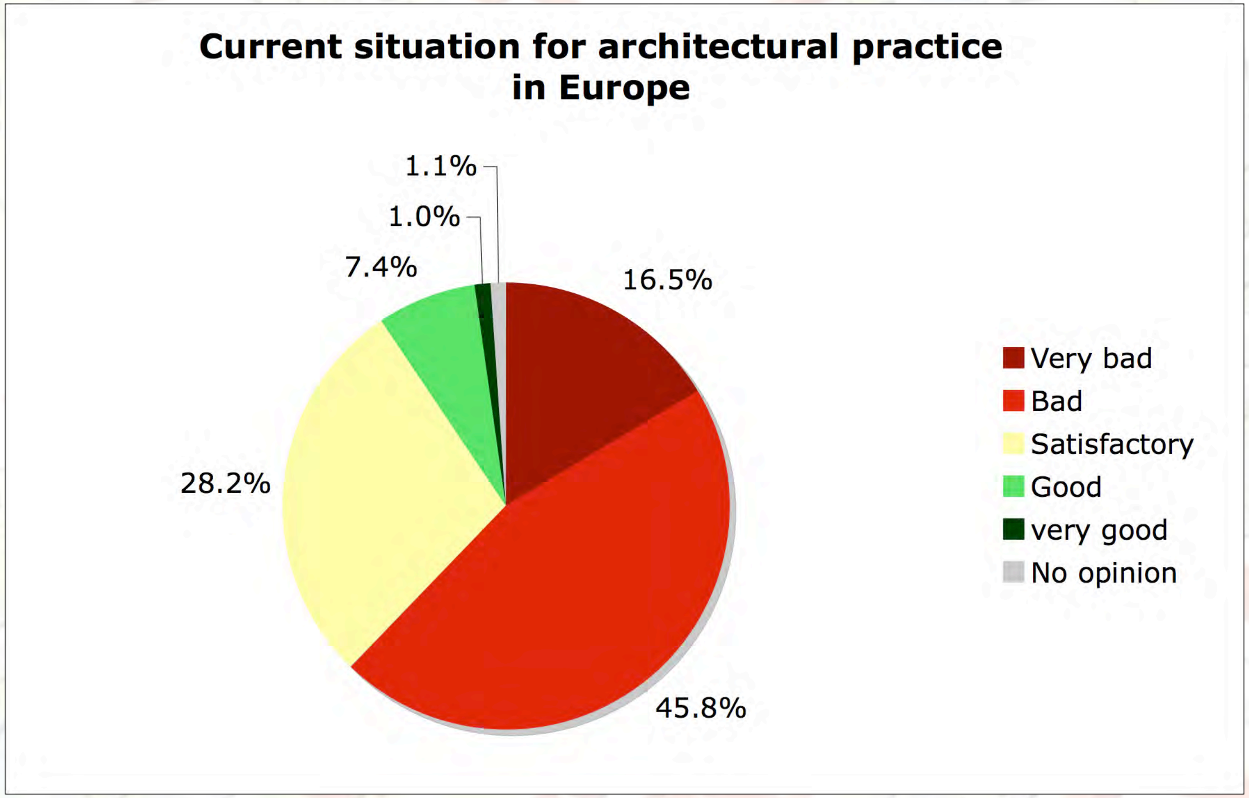


Good Representation from all sizes of Architectural Practice

Spread Reflects Sector Study Profile well

No Other Information About Respondents was Sought

Second Economic Impact Survey June-09



Overall a Significantly More Pessimistic Outlook than in April 2009

Survey to be Repeated in September 2009 to Permit a Trend Analysis

JUNE:	Pessimistic	62.3%	8.4%	Optimistic
April:	Pessimistic	46.5%	14.9%	Optimistic

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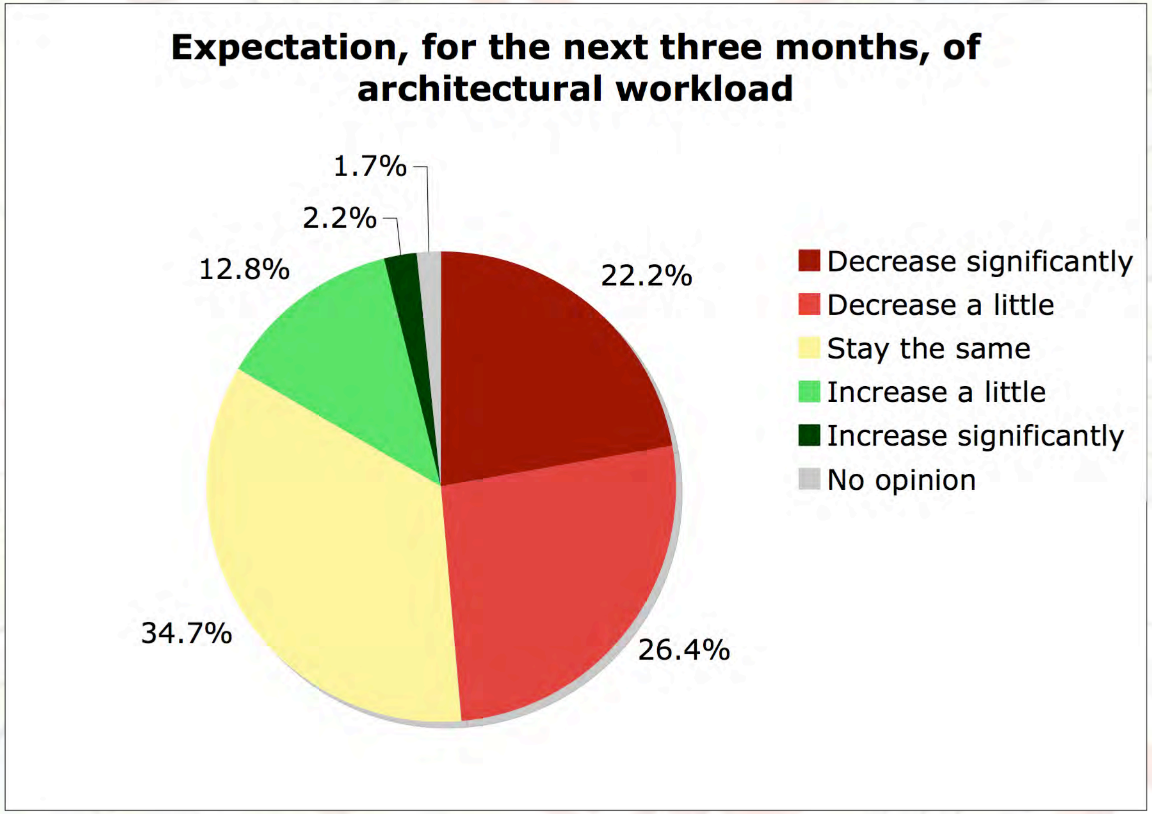

Breakdown by Building Type Comes Later in the Presentation

JUNE:	Pessimistic	48.6%	15.0%	Optimistic
April:	Pessimistic	43.3%	15.0%	Optimistic

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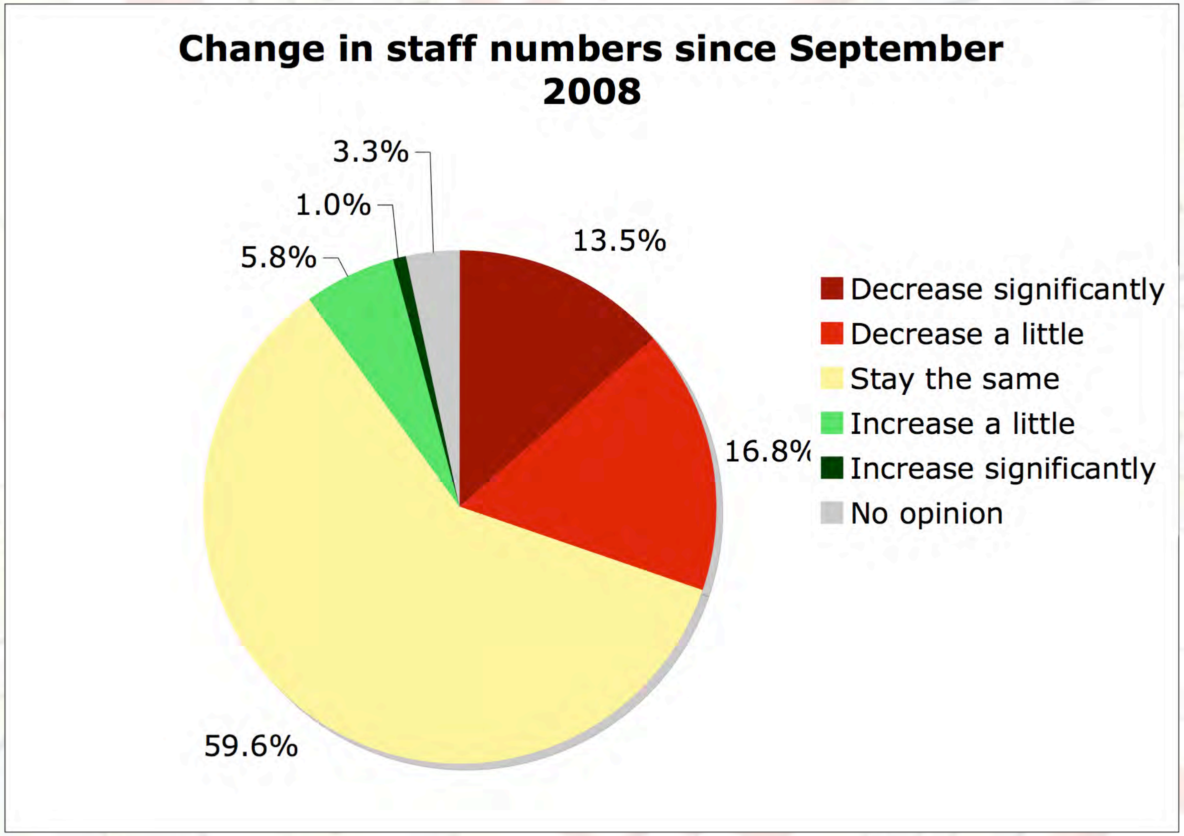

The assumption behind this question is that the economic crisis started to be felt in September 2008

From these answers we can see that 30% of architects offices have seen a decrease in staff numbers since September 2008

JUNE:	**Decreased**	**30.3%**	**6.8%**	**Increased**
April:	**Decreased**	**24.6%**	**10.0%**	**Increased**

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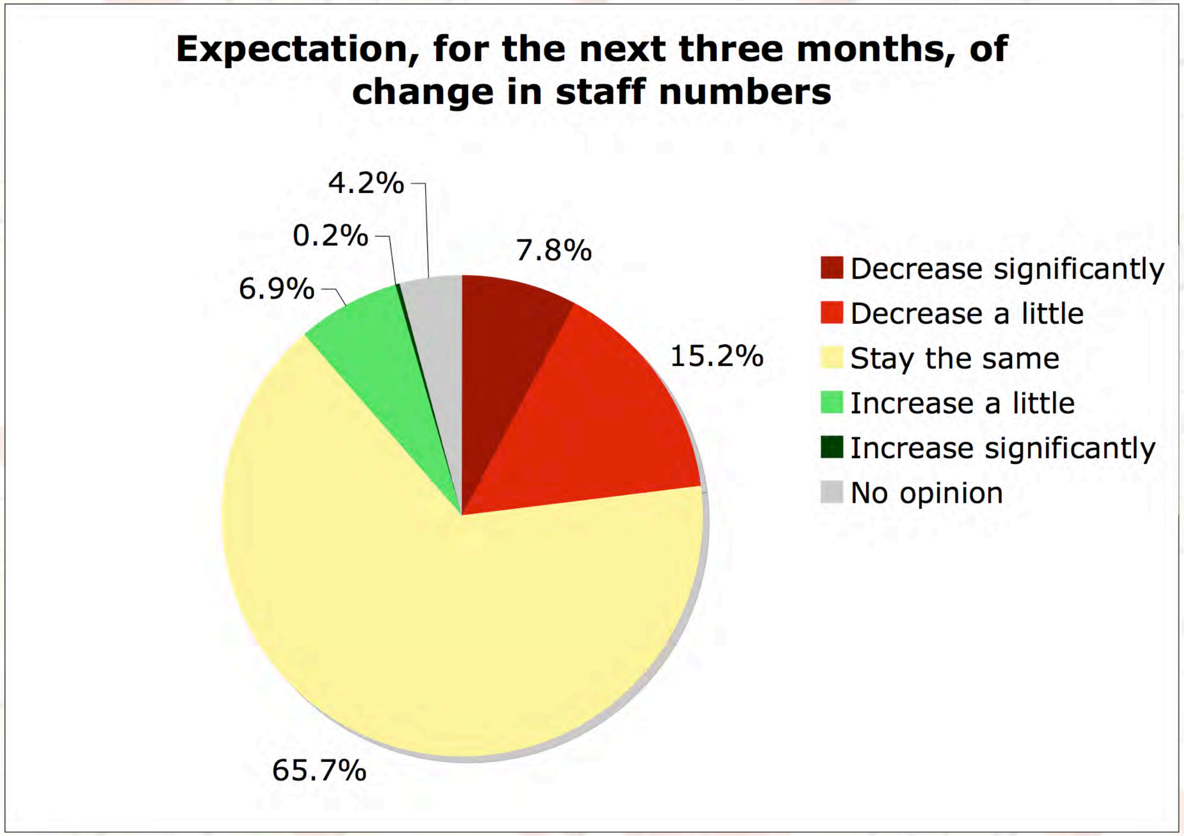

From this pie chart we can see that 23% of architects offices expect that staff numbers will decrease in the coming three months.

If linked to decreases reported in the previous slide, we can see that optimism about a recovery for the sector is low. This is reflected in the expectations about workload shown in the next slides

JUNE:

Pessimistic	23.0%	7.1%	Optimistic

April:

Pessimistic	21.3%	8.7%	Optimistic

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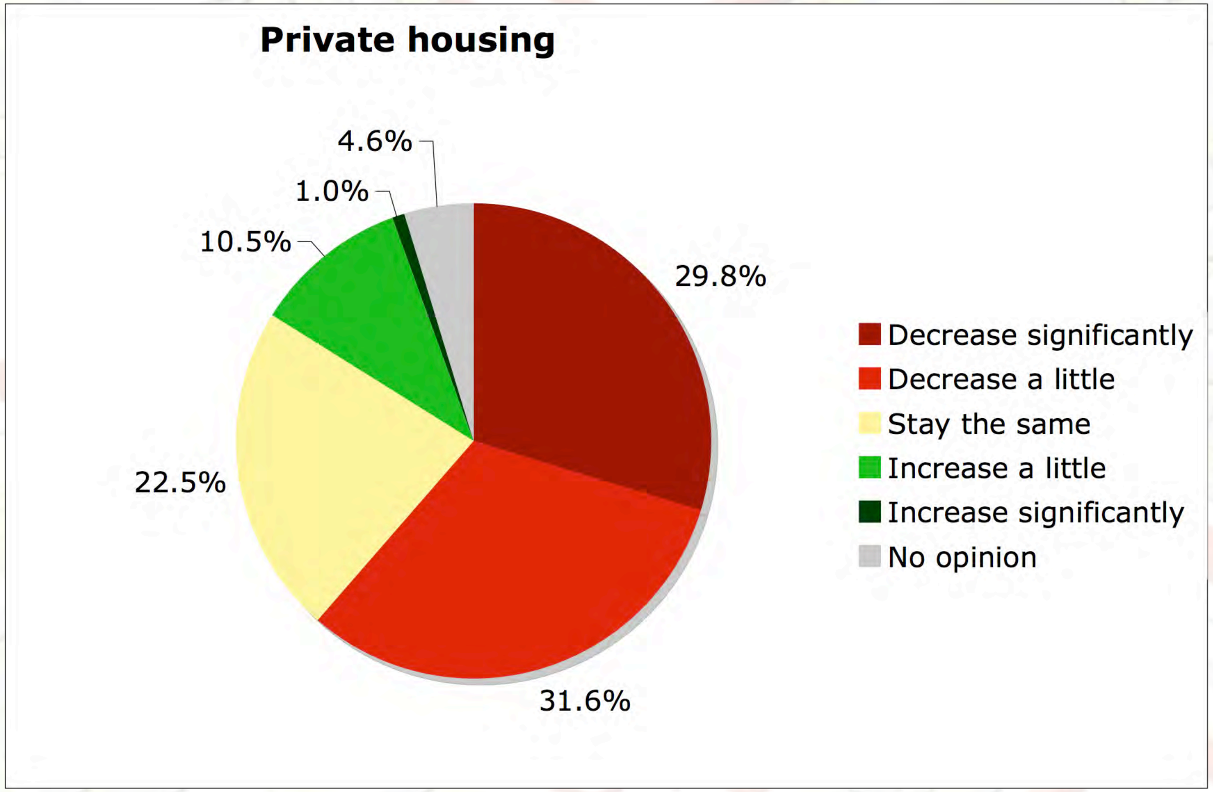
Expected Change in Workload Over Next 3 Months:



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

JUNE:

Pessimistic	61.4%	11.5%	Optimistic

April:

Pessimistic	57.9%	11.8%	Optimistic

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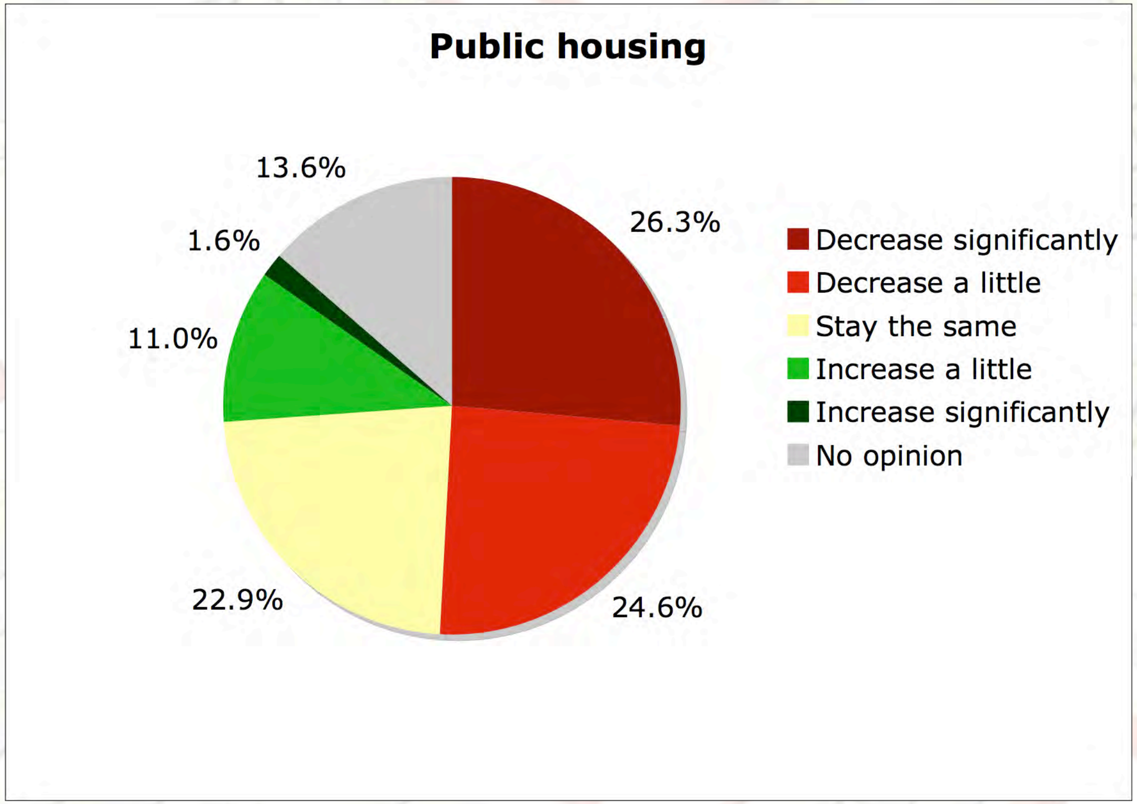
Expected Change in Workload Over Next 3 Months:



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

JUNE:	**Pessimistic**	**50.9%**	**12.6%**	**Optimistic**
April:	**Pessimistic**	**44.6%**	**12.5%**	**Optimistic**

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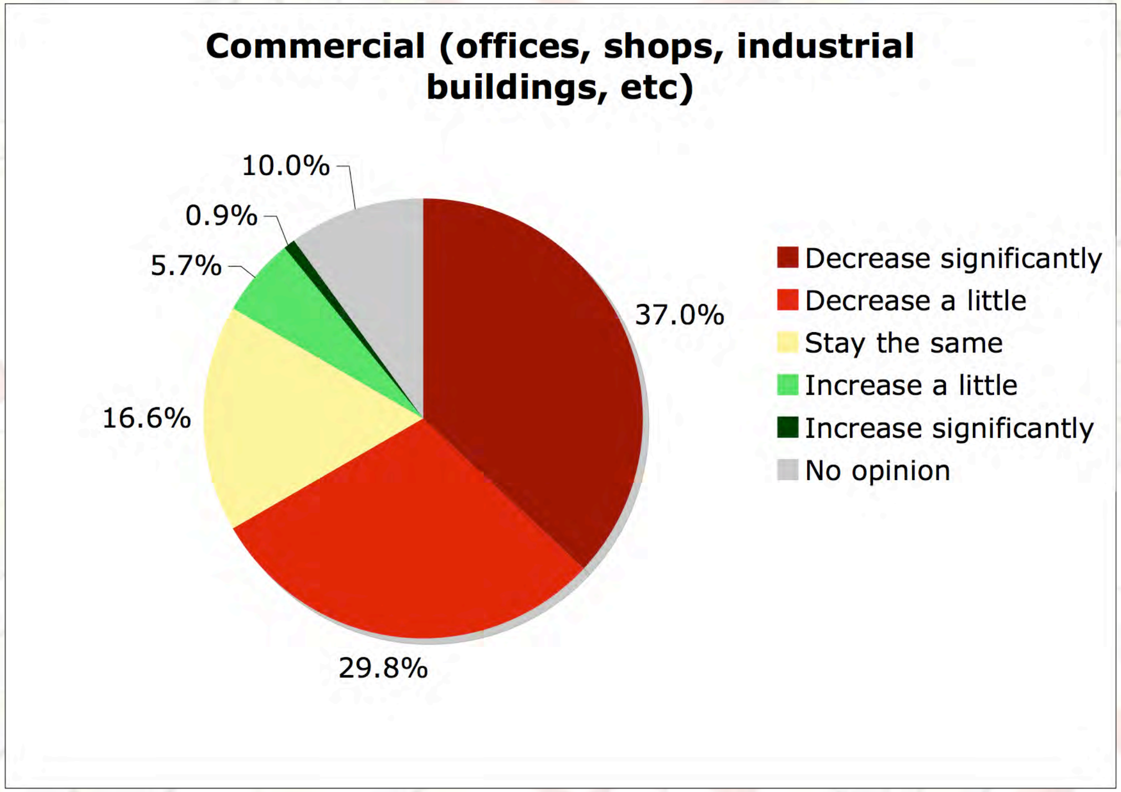
Expected Change in Workload Over Next 3 Months:



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

JUNE:	Pessimistic	66.8%	6.6%	Optimistic
April:	Pessimistic	67.3%	5.8%	Optimistic

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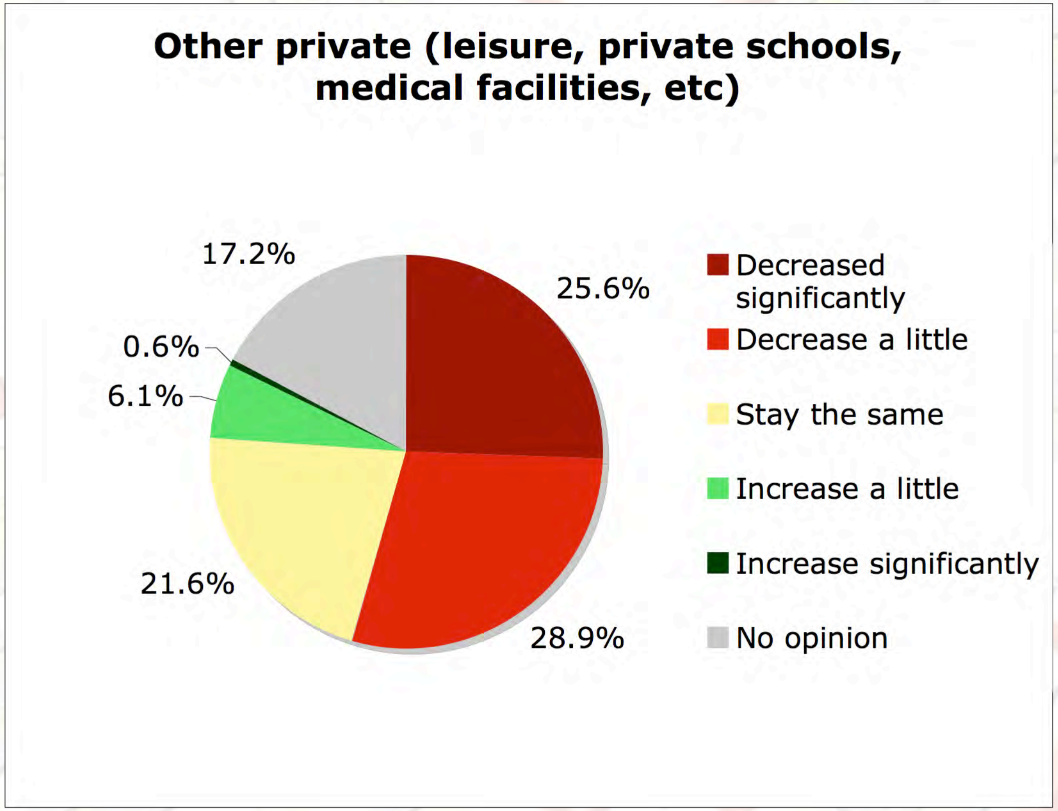
Expected Change in Workload Over Next 3 Months:



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

JUNE:

Pessimistic	54.5%	6.7%	Optimistic

April:

Pessimistic	50.9%	5.6%	Optimistic

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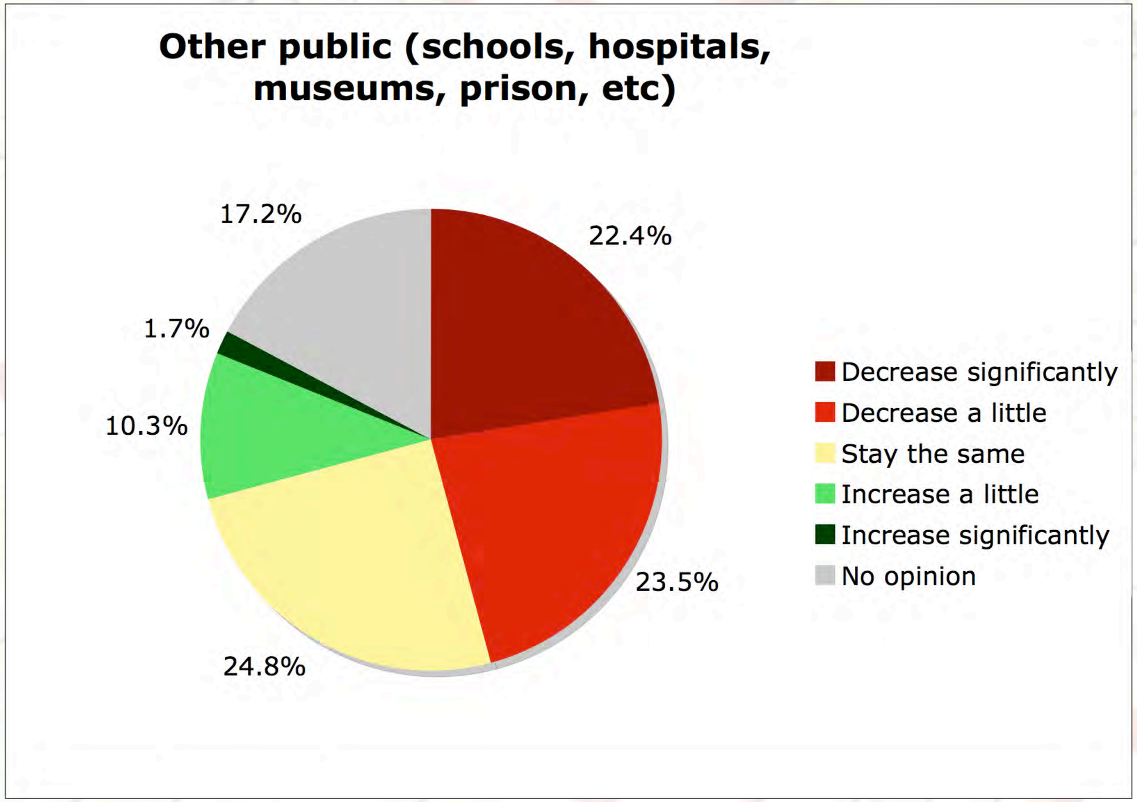
Expected Change in Workload Over Next 3 Months:



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

JUNE:	Pessimistic	45.9%	12.0%	Optimistic
April:	Pessimistic	35.0%	15.4%	Optimistic

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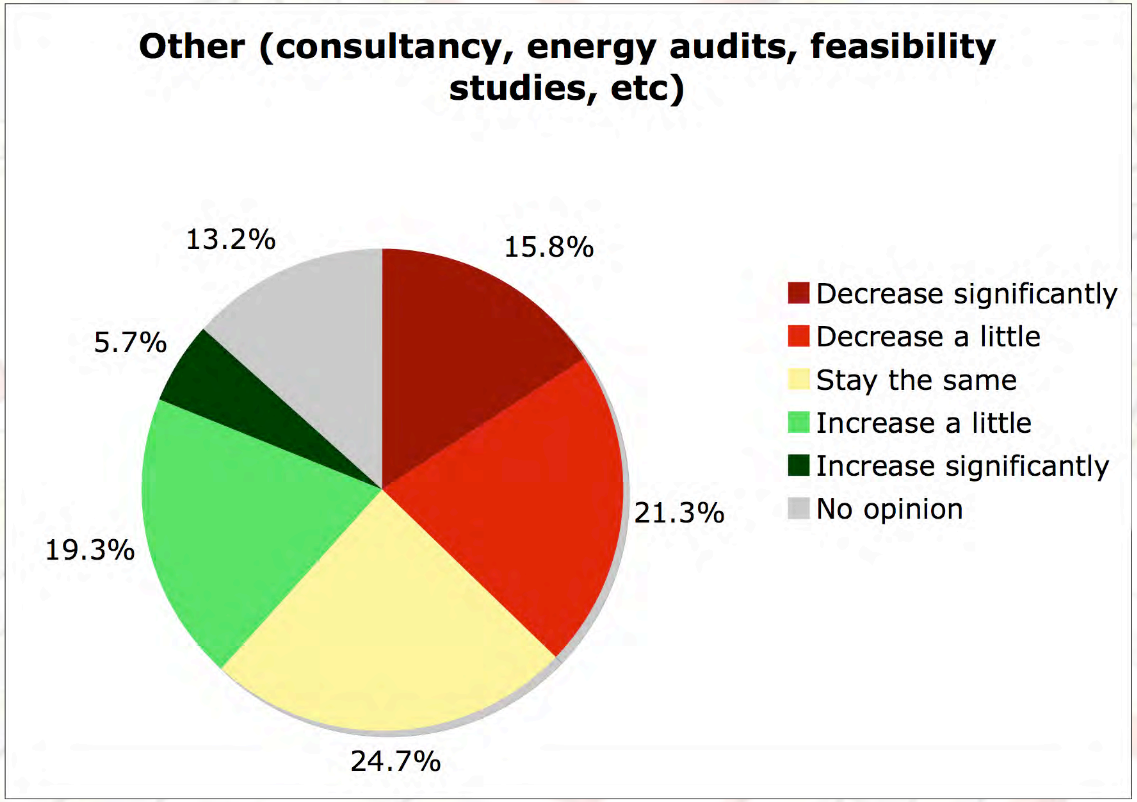
Expected Change in Workload Over Next 3 Months:



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

JUNE:	Pessimistic	37.1%	25.0%	Optimistic
April:	Pessimistic	29.8%	27.0%	Optimistic

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 worsened in the last three months

- After the next survey (to be run from the 14th to 28th September 2009), a trend analysis of all surveys should be carried out