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First preliminary evaluation of a short online survey on the effects of the corona pandemic in Germany

The joint survey of the Federal Chamber of German Architects and the Federal Chamber of German Engineers was conducted as an online survey from 6 April to 14 April 2020. All self-employed members of the German federal state chambers of architects and engineers were invited to participate. The present report presents the results for the 6,013 self-employed members of the Chambers of Architects of the Länder who took part in the survey. This represents approximately 4,4 % of all self-employed chamber members. The field of interior architecture is particularly often affected.

Noticeable negative consequences of the corona epidemic:

- 30% of the of the answering persons feel clearly negative effects at the time of the survey.
- 51% feel slight negative effects of the corona epidemic.
- Larger offices, offices with predominantly commercial or private clients are particularly frequently affected.

Nature of the negative effects of the corona epidemic

- The most common problems are cancelled or postponed orders, delays in the approval process due to an understaffed public administration and delays on the construction sites.

Negative economic consequences of the corona epidemic

- 58% of the office owners surveyed are currently experiencing or predict negative economic consequences for their own office.

Nature of the negative economic consequences of the corona epidemic

- 35% of the respondents expect a liquidity squeeze in the second half of 2020. 18% say they have liquidity problems now or will have them soon.
- One fifth of those surveyed are (soon) no longer working to capacity.
- While small offices are confronted with liquidity problems more frequently, larger offices more frequently state that they are no longer working to capacity.

Expected development in the next three months

- 24% of those surveyed expect the economic situation to deteriorate significantly in the next three months, 51% expect a slight deterioration.
- Smaller offices expect the situation to deteriorate less often than larger offices. However, if they expect the situation to deteriorate, they are more likely to anticipate a significant deterioration than large offices.

Measures already taken

- 53% of office owners have not yet taken measures in response to the corona epidemic. 27% have applied for subsidies or are preparing to do so. One fifth have contacted clients to ensure prompt payment of invoices. 12% have applied for short-time working.
- While small offices are more likely to apply for subsidies, larger offices are more likely to ensure that invoices are paid quickly, apply for short-time work or apply for loans.

Required financial support

- Almost two thirds of office owners (63%) do not yet need financial support. 22% each need relief for tax prepayments or subsidies. A good tenth depends on relief for social security contributions or wage costs.
- While larger offices rely more often on relief measures, smaller offices need subsidies more often.

Accuracy of fit and user-friendliness of subsidy programmes

- The majority of office owners are unable to evaluate the support programmes in a meaningful way, as it has not been necessary to apply for them until now (63%). 23% evaluate them positively in terms of content, 14% negatively.
- The user-friendliness of the application is also not evaluated by 63%. 29% give a positive, whereas 8% a negative assessment.
- Large offices more often make a negative judgement regarding the accuracy of the support programmes than small offices.

Home office and data infrastructure

- Two thirds of office owners have (partly) moved their employees to remote work. The larger the office, the higher this proportion is. This can probably be explained by a greater difficulty in implementing hygiene regulations in larger companies.
- 72% of those surveyed consider the existing data infrastructure to be sufficient to ensure a smooth working from the home office.

Special need for advice due to the corona epidemic

- Almost half of the office owners (47%) have a special need for advice due to the corona epidemic. This relates in roughly equal parts to questions of building / architect / contract law, organisational questions, financial support and questions of employment law.

Derivations and demands on politics

- Keep construction sites open.
- Solve corona-related financing problems of private developers so that construction projects are not delayed or cancelled.
- Credit programmes are particularly important when projects are postponed and therefore temporary liquidity problems arise for the architectural firms.
- In general, subsidy programmes and relief of tax prepayments are considered more necessary than credit programmes. It is therefore important to ensure that subsidy programmes are still available in several months' time.