

14th Economic Trends Survey



ARCHITECTS' COUNCIL OF EUROPE
CONSEIL DES ARCHITECTES D'EUROPE

January 2016



14th Economic Trends Survey

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Janvier 2016



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Austria
 Croatia
 Cyprus
 Czech Republic
 Denmark
 Estonia
 France
 Greece
 Latvia
 Luxembourg
 Malta
 Norway
 Romania
 Slovenia
 Turkey
 Belgium
 Bulgaria
 Finland
 Germany
 Hungary
 Italy
 Irlande
 Lithuania
 Netherlands
 Poland
 Portugal
 Slovakia
 Spain
 Sweden
 Switzerland
 United Kingdom

2365 Architects have responded to the questionnaire.

Warning: Some countries 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).

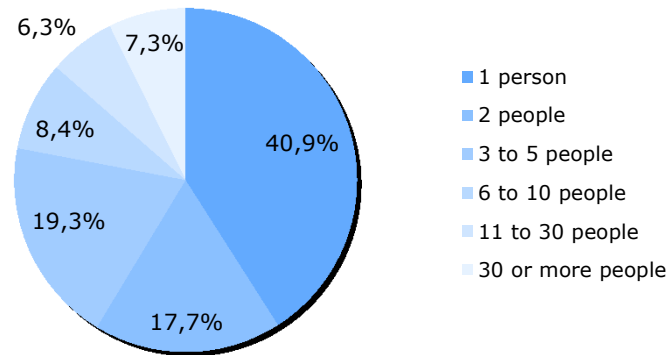
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Profile of respondents

Number of people in the company or practice where respondents work



All sizes of architectural practice are well represented.

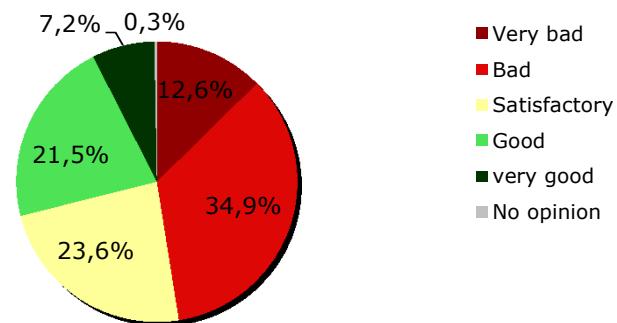
The distribution is similar to the previous surveys

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Current situation for architectural practice in Europe



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.

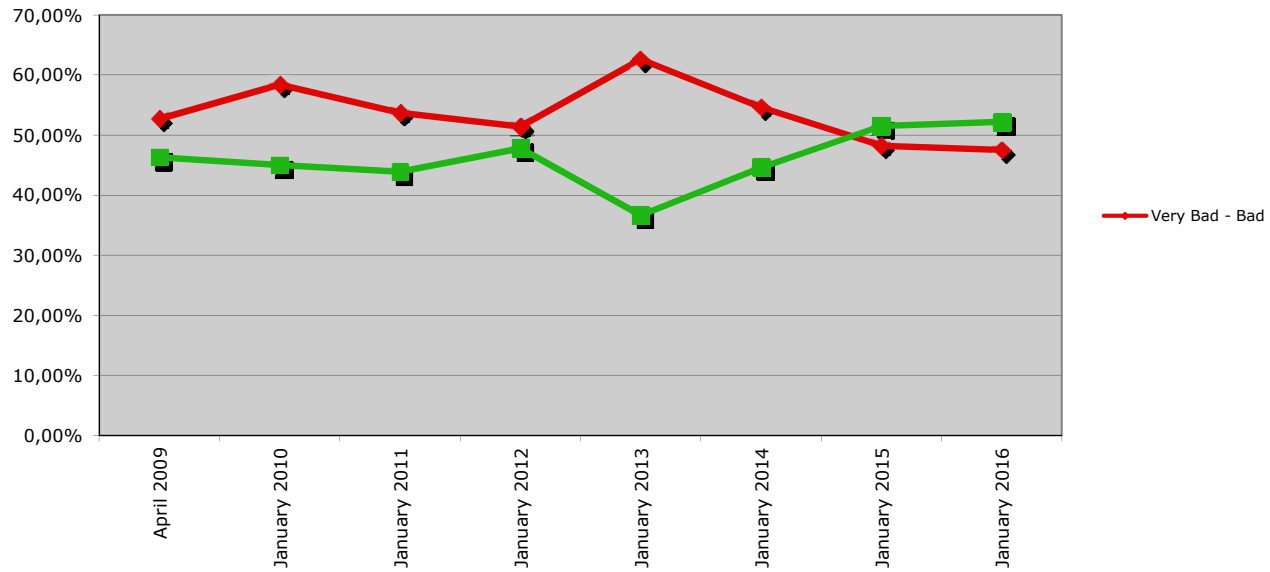
	Very Bad - Bad	Satisfactory- Good- Very Good
April 2009	52,70%	46,30%
January 2010	58,40%	45,00%
January 2011	53,70%	43,90%
January 2012	51,40%	47,80%
January 2013	62,60%	36,63%
January 2014	54,60%	44,60%
January 2015	48,20%	51,50%
January 2016	47,50%	52,20%

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Current situation for architectural practice (business) in Europe

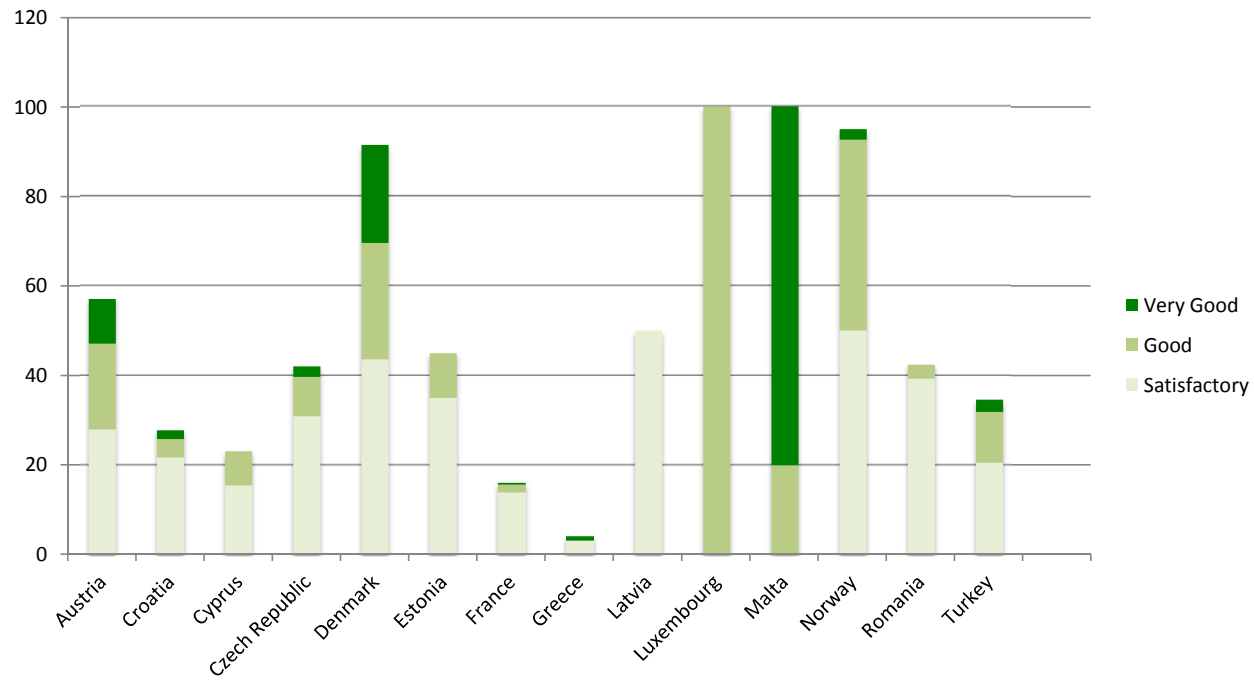


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Persons judging the architectural market in their country to be satisfactory, good or very good

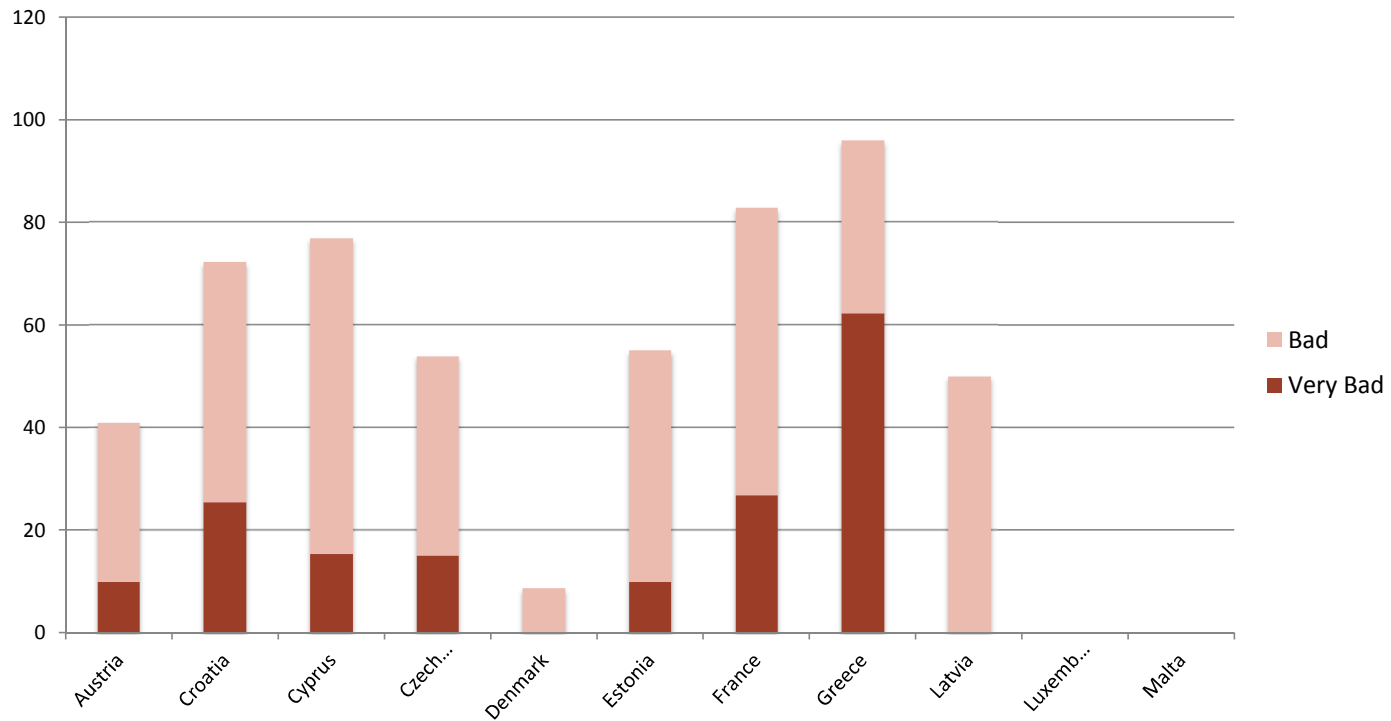


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Persons judging the architectural market in their country to be bad or very bad

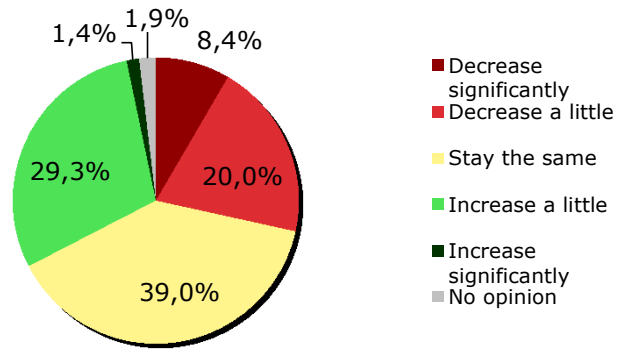


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Expectation, for the next three months, of architectural workload



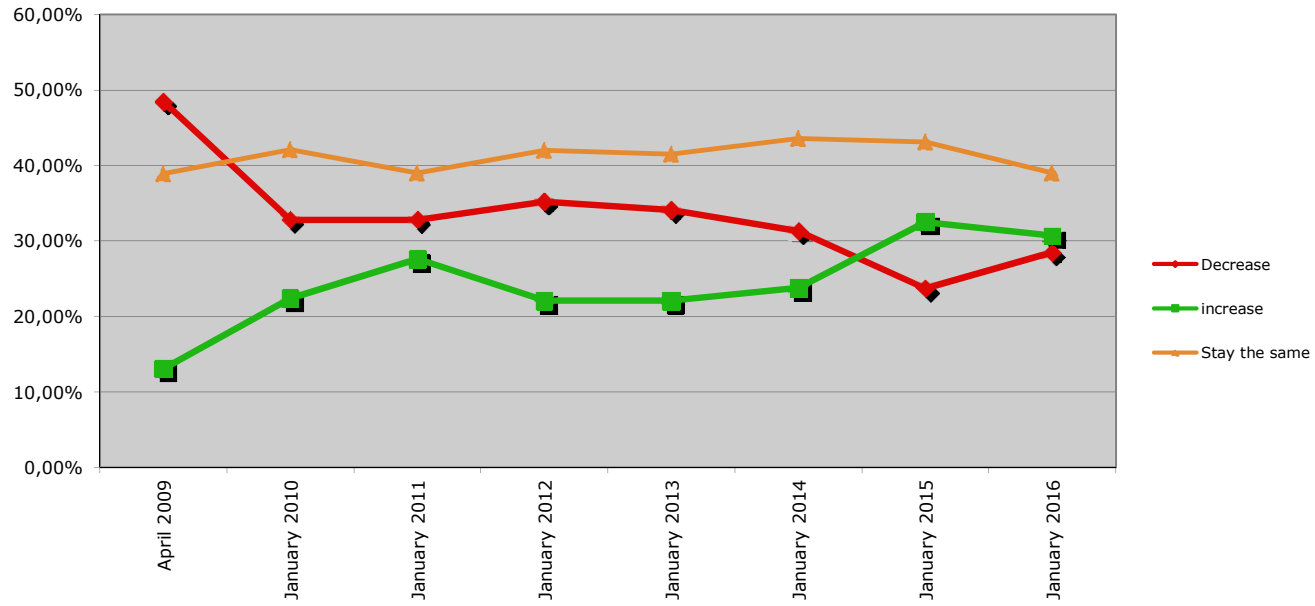
	Decrease	increase	Stay the same
April 2009	48,47%	13,09%	38,90%
January 2010	32,80%	22,40%	42,10%
January 2011	32,80%	27,60%	39,00%
January 2012	35,20%	22,10%	42,00%
January 2013	34,10%	22,10%	41,50%
January 2014	31,30%	23,80%	43,60%
January 2015	23,70%	32,50%	43,10%
January 2016	28,50%	30,70%	39,00%

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Expectation for the next three months, of architecture workload

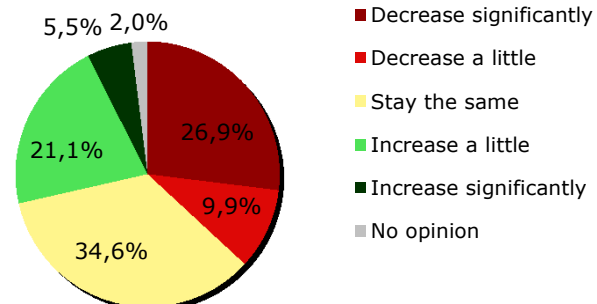


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Change in staff numbers since September 2008



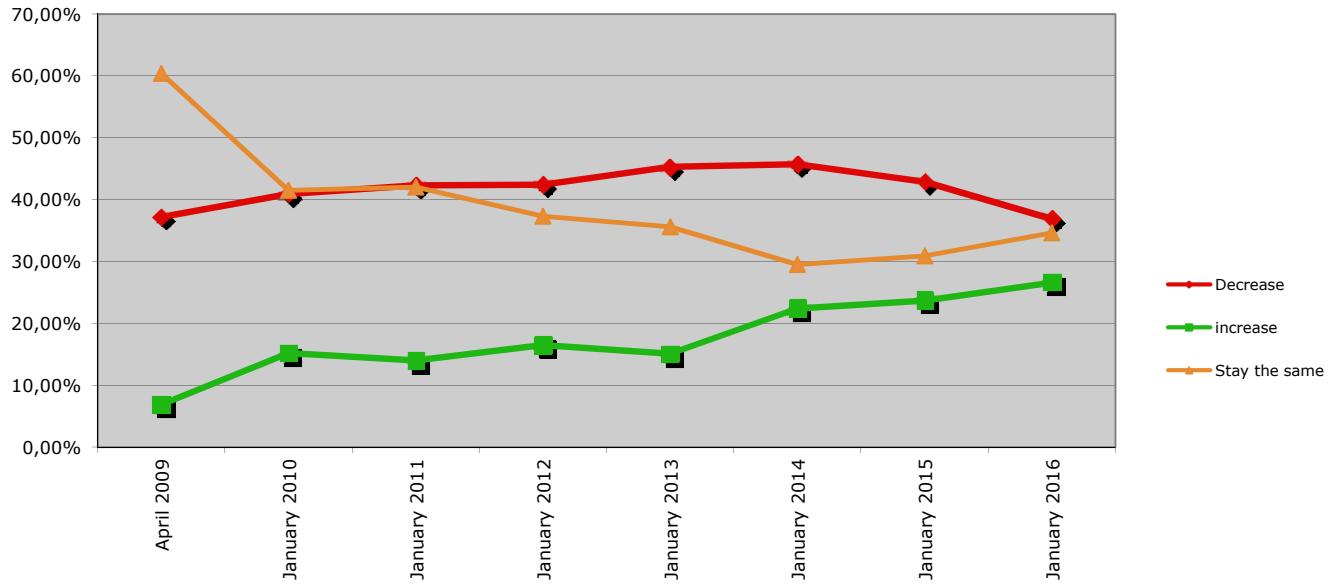
	Decrease	increase	Stay the same
April 2009	37,18%	6,85%	60,40%
January 2010	40,90%	15,20%	41,50%
January 2011	42,30%	14,00%	42,00%
January 2012	42,40%	16,50%	37,30%
January 2013	45,30%	15,10%	35,60%
January 2014	45,70%	22,40%	29,50%
January 2015	42,90%	23,70%	30,90%
January 2016	36,90%	26,60%	34,61%

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Change in staff numbers since September 2008

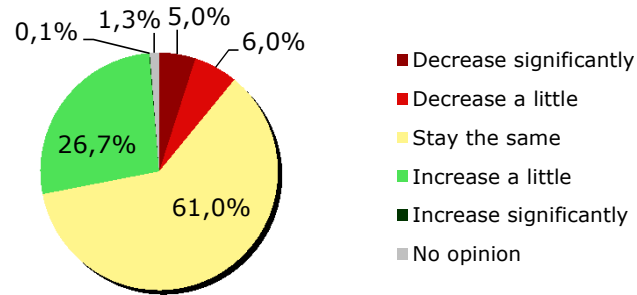


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Expectation, re: staff numbers for the next three months



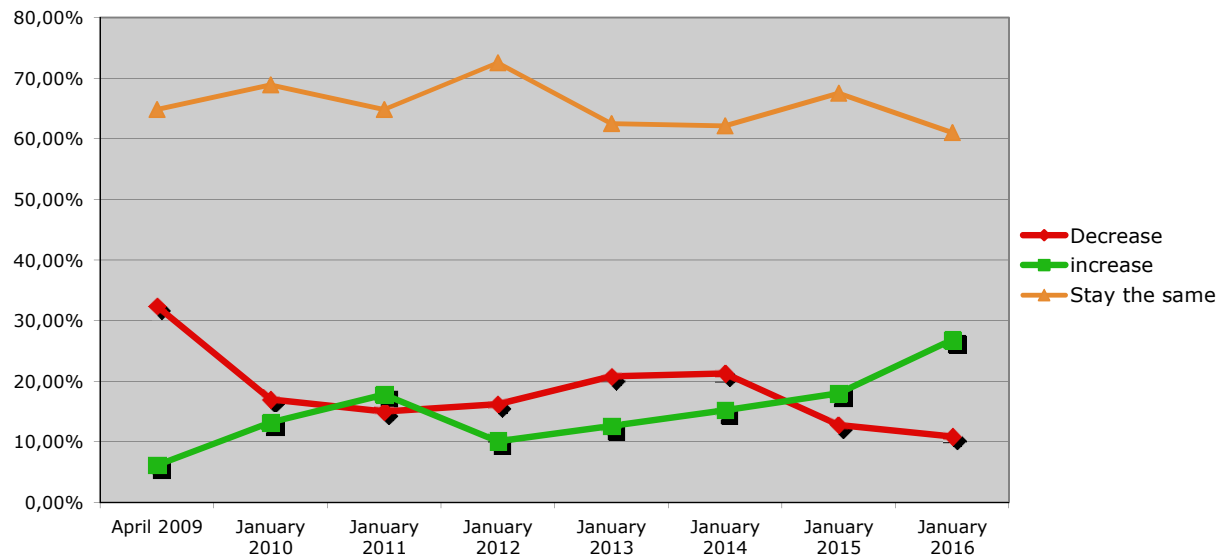
	Decrease	increase	Stay the same
April 2009	32,35%	6,15%	64,80%
January 2010	17,00%	13,20%	68,90%
January 2011	15,00%	17,80%	64,80%
January 2012	16,20%	10,10%	72,50%
January 2013	20,80%	12,60%	62,50%
January 2014	21,30%	15,20%	62,10%
January 2015	12,80%	18,00%	67,50%
January 2016	10,90%	26,80%	61,00%

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Expectation re: staff numbers for the next three months

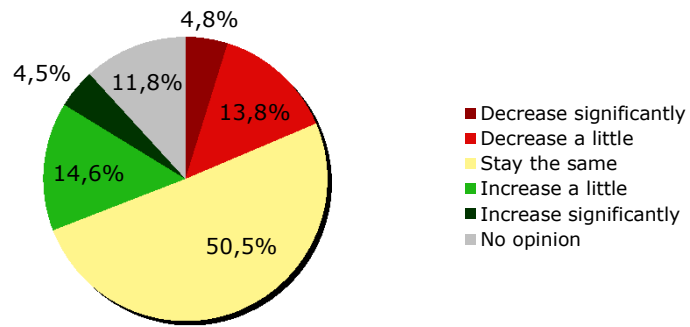


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Expected change in workload over next 3 months - Private housing



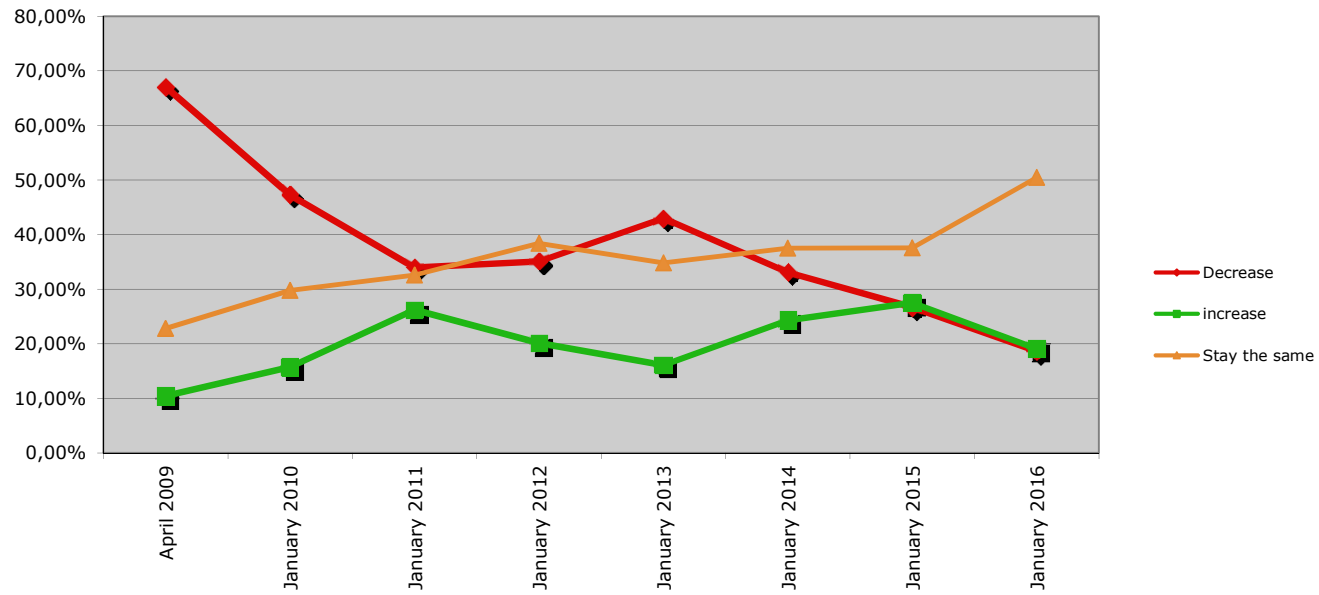
	Decrease	increase	Stay the same
April 2009	67,04%	10,44%	22,80%
January 2010	47,30%	15,70%	29,80%
January 2011	34,00%	26,20%	32,60%
January 2012	35,10%	20,10%	38,40%
January 2013	43,00%	16,10%	34,80%
January 2014	33,10%	24,30%	37,50%
January 2015	26,70%	27,50%	37,60%
January 2016	18,60%	19,10%	50,50%

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Expected change in workload over next three months - Private Housing

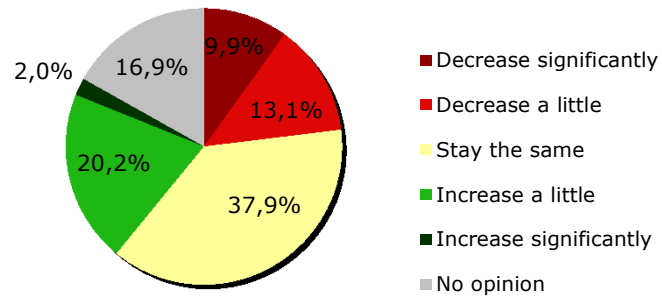


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Expected change in workload over next 3 months - Public housing



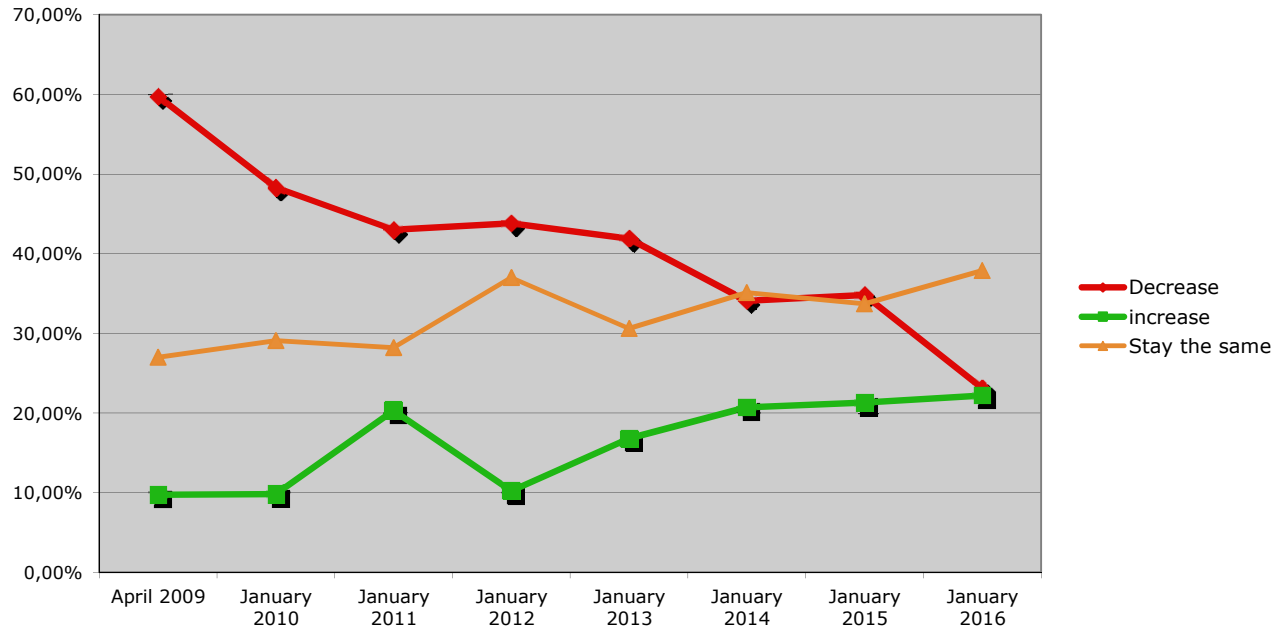
	Decrease	increase	Stay the same
April 2009	59,78%	9,73%	27,00%
January 2010	48,30%	9,80%	29,10%
January 2011	43,00%	20,30%	28,20%
January 2012	43,80%	10,20%	37,00%
January 2013	41,90%	16,80%	30,60%
January 2014	34,10%	20,70%	35,10%
January 2015	34,80%	21,30%	33,70%
January 2016	23,10%	22,20%	37,90%

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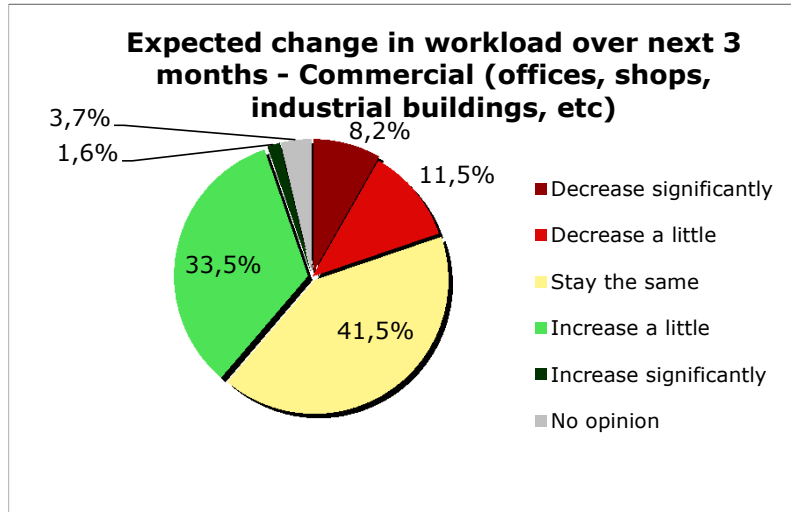
Expected change in workload over next three months - Public Housing



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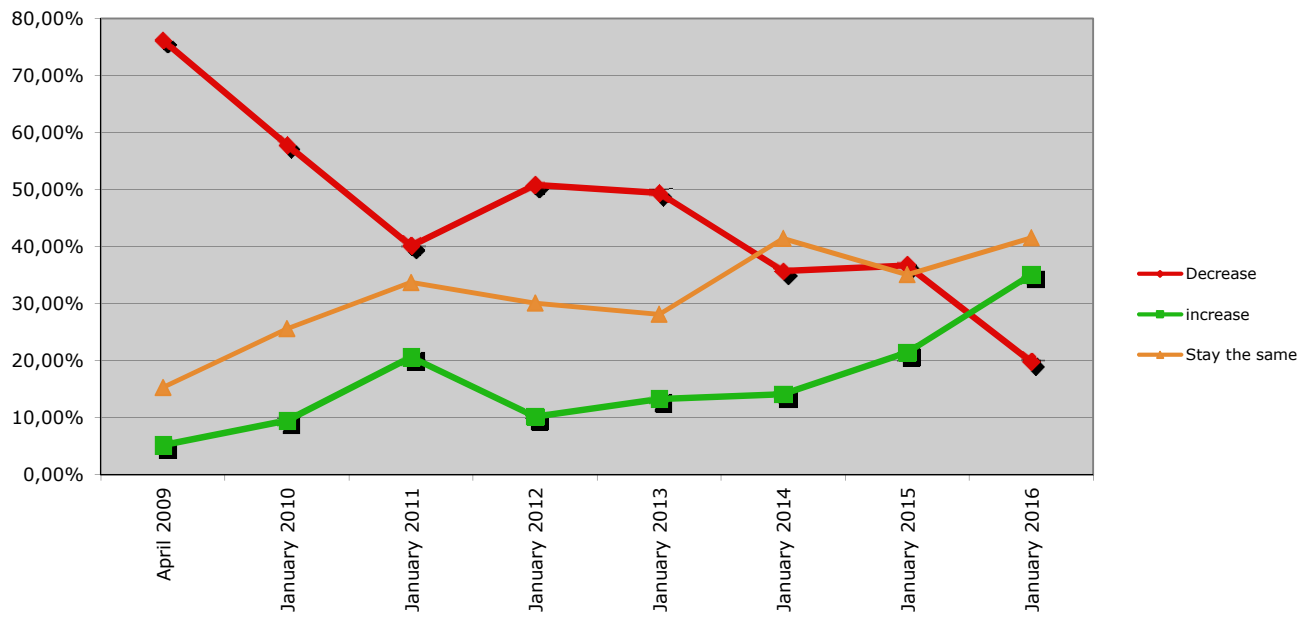
	Decrease	increase	Stay the same
April 2009	76,19%	5,18%	15,30%
January 2010	57,80%	9,50%	25,60%
January 2011	40,10%	20,60%	33,70%
January 2012	50,80%	10,20%	30,10%
January 2013	49,40%	13,30%	28,10%
January 2014	35,70%	14,10%	41,40%
January 2015	36,70%	21,40%	35,10%
January 2016	19,80%	35,10%	41,50%

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Expected change in workload over next three months - Commercial

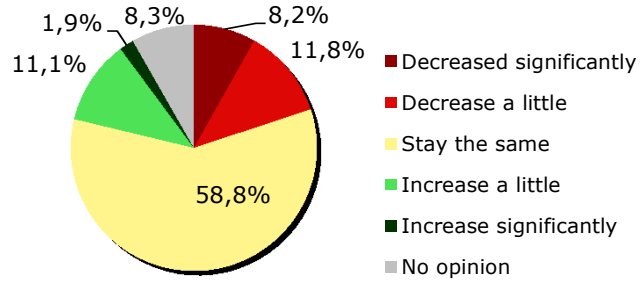


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Expected change in workload over next 3 months - Other private (leisure, private schools, medical facilities, etc)



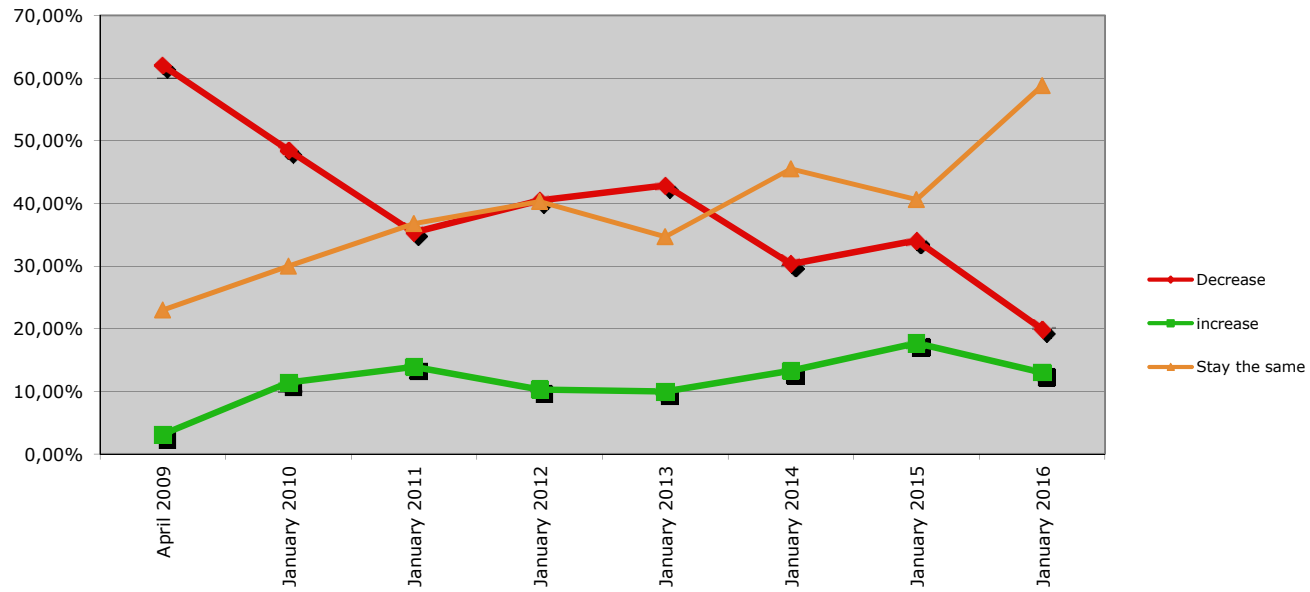
	Decrease	increase	Stay the same
April 2009	62,07%	3,12%	23,00%
January 2010	48,50%	11,40%	30,00%
January 2011	35,40%	13,90%	36,80%
January 2012	40,50%	10,30%	40,30%
January 2013	42,90%	10,00%	34,70%
January 2014	30,30%	13,30%	45,50%
January 2015	34,10%	17,70%	40,60%
January 2016	19,90%	13,00%	58,80%

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Expected change in workload over next three months - Other Private

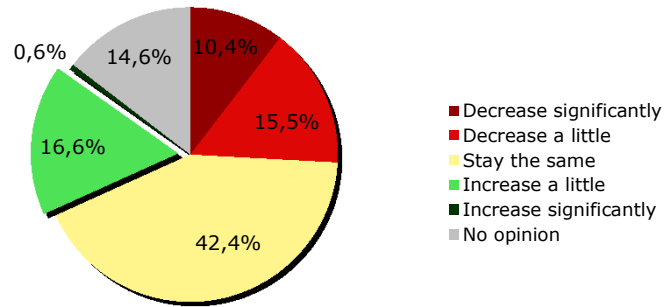


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Expected change in workload over next 3 months - Other public (schools, hospitals, museums, prison, etc)



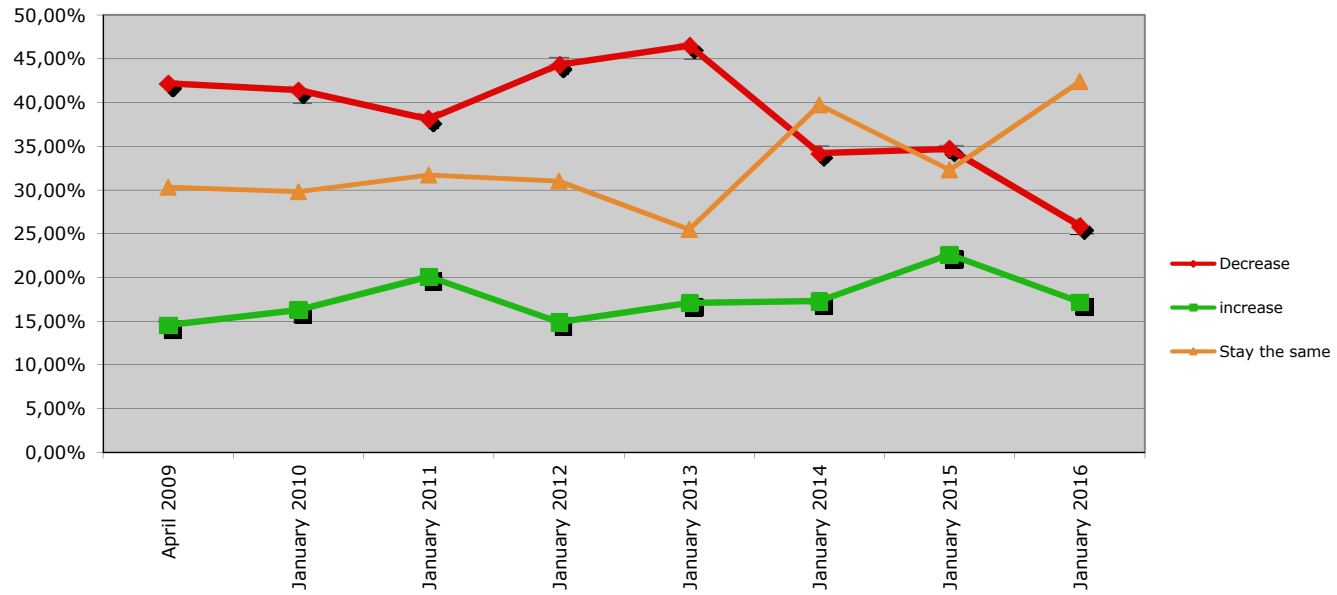
	Decrease	increase	Stay the same
April 2009	42,18%	14,58%	30,30%
January 2010	41,40%	16,30%	29,80%
January 2011	38,10%	20,10%	31,70%
January 2012	44,30%	14,90%	31,00%
January 2013	46,50%	17,10%	25,50%
January 2014	34,20%	17,30%	39,70%
January 2015	34,70%	22,60%	32,30%
January 2016	25,90%	17,20%	42,40%

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Expected change in workload over next three months - Other Public

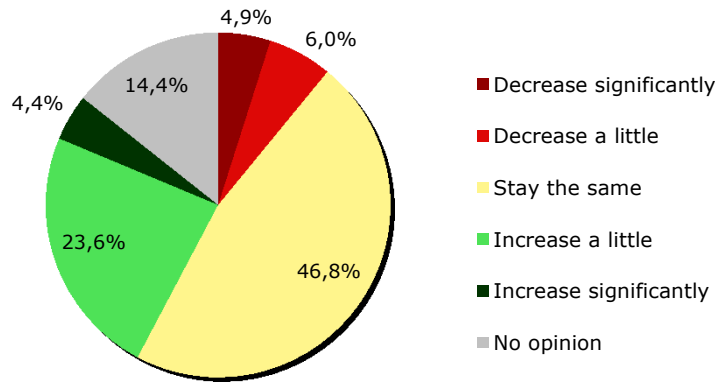


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Expected change in workload over next 3 months - Other (consultancy, energy audits, feasibility studies, etc)



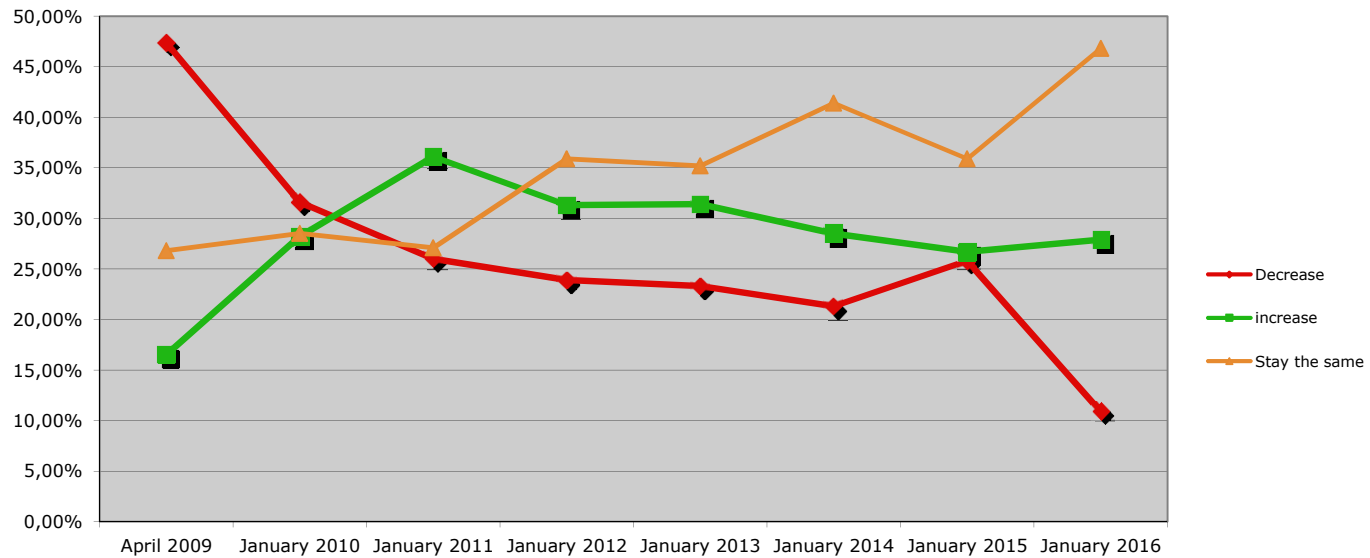
	Decrease	increase	Stay the same
April 2009	47,38%	16,51%	26,80%
January 2010	31,60%	28,20%	28,50%
January 2011	26,00%	36,10%	27,10%
January 2012	23,90%	31,30%	35,90%
January 2013	23,30%	31,40%	35,20%
January 2014	21,30%	28,50%	41,40%
January 2015	25,80%	26,70%	35,90%
January 2016	10,90%	27,90%	46,80%

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Expected change in workload over next three months - Other



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CONCLUSIONS

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Thank you for your attention



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