

SUBSCRIPTION EUROPEAN ARCHITECTURAL BAROMETER

Explanation

A subscription for the European Architectural Barometer contains 4 reports per year, based on the quarterly research among 1.600 architects in 8 European countries. Every quarter the economic development at major architect agencies is presented, which is a major indicator for the future development of the construction industry. Besides the economic development every quarter an important trend is investigated. Current trends covered by the survey are sustainability, love brands of architects, usage of BIM, decision making process & buying criteria, used orientation sources, and technology & design trends. With a subscription on the European Architectural Barometer organizations are well and early informed about major trends which will determine the building industry for the next years.

Key characteristics

Current Countries:	Germany, France, Italy, Spain, The Netherlands, UK
Future Countries:	Q4 2012 Belgium, Q1 2013 Poland
Number of Interviews:	1.600 successful interviews per country (200 per country)
Architects involved:	Bigger agencies (≥ 3 FTE) active in the residential and non residential market
Reliability & false margin:	90% reliability and a false margin between +/- 6 to 7%
Fieldwork period:	week 12/13 (Q1 report), week 25/26 (Q2), week 38/39 (Q3) and week 50/51 (Q4)
Report available:	week 16 (Q1), week 29 (Q2), week 42 (Q3), week 4 (Q4)
Report form:	About 80 pages in Power Point, customer receives digital and printed report
Language:	English
Planned theme's :	Q3-2012: Sustainability Q4-2012: Orientation & media consumption Q1-2013: Love brands Q2-2013: Architectural design & technology trends
Price:	€ 5.800 per year, subscription will be prolonged automatically.
Cancelation:	3 months for subscription date.
Subscribe:	http://www.arch-vision.eu/index.php?pg=form

Questions regarding the economic situation (asked each quarter)

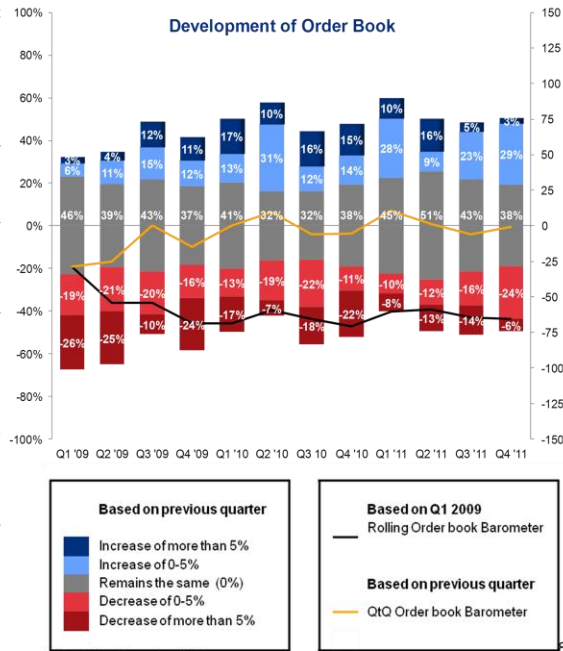
- Order book and turnover development
- Development in the number of projects
- Size of the order book
- Segment affected by the economic circumstances
- Expectation to have an empty order book
- Biggest opportunities and threats this year
- Expected development of the order book

Snap shot key results

KEY FINDINGS — UK (3) ARCH-VISION

UK order book development stabilizing on same low level since the crisis

- As described before, the order books in Q4 2011 are practically at the same level as Q3 2011. The order book development has been measured from the beginning of Arch-Vision (Q1 2009). The graph illustrates that the order book development in the UK was negative in Q1 2009 (and probably also in Q4 2008). The decline lasted until Q4 2009 and after that period, the order books remained stable. So no further decline, but also no recovery (cf. the Rolling Barometer line).
- The new barometer (the Rolling Barometer) provides a better picture than the initial barometer (where results are compared quarter to quarter). If the market improved in a certain period, the old index instantly became positive. In Q2 2010 and Q3 2009, this kind of situation was given. In comparison, the Rolling Barometer stays negative up to the very moment that the situation has improved compared to the starting point of the measurement.
- Looking at the Rolling Order Book Barometer, and comparing it to other countries, the UK (-65) is not performing that badly. Germany has a Rolling Order Book Barometer of +113, France has -81, the Netherlands has -93, Italy has -269, and Spain -584. So the UK has not recovered with respect to the order book development in itself, but the UK decline is still modest in comparison to most other countries.



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KEY FINDINGS — GERMANY (1) ARCH-VISION

Positive development continuing in Germany in Q4 2011

- In Germany, the development of order books has been improving each quarter since mid 2010. The turnover development improved a little later, but since 2011, it has also been improving. In Q4 2011, this positive development continued in Germany and is now also reflected by an improving average number of employees.
- The turnover in Q4 2011 improved for the fourth time in a row. The order books developed positively for the sixth time in a row. Only 4% of the architect agencies in Germany expect an empty order book within one year. The order books are filled for 9.7 months, thus being at the highest level since the European Architectural Barometer was started.
- From a look at the new Rolling Barometers (which compare the current situation with the situation from the beginning of the Architectural Barometer) it can be concluded that the Order Book Barometer has grown by 113 points since Q1 2003 and the Turnover Barometer by 71 points since Q3 2009. So in 2012 and 2013, the German construction market, based on the Architectural Barometer, will be significantly better than in 2010 and 2011.

Short-term outlook among German architects	2009		2010				2011			
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Number of FTE	7.8	8.0	9.4	8.4	9.0	10.3	7.8	6.7	7.1	9.0 ▲
Number of projects per FTE	1.8	1.8	2.0	1.3	1.5	0.8	0.8	1.6	2.1	2.0 ▼
Order book in months	8.0	7.7	7.6	5.0	6.9	5.2	6.7	8.0	9.7	9.7 ►
Barometer Order Book QtQ (compared to previous Quarter)	108	102	99	94	103	124	128	118	113	119 ▲
Barometer Order Book Rolling (compared to Q1 2009)	14	15	14	8	11	35	63	81	94	113 ▲
Barometer Turnover QtQ (compared to previous Quarter)	106	101	100	121	105	93	119	113	106	108 ▲
Barometer Turnover Rolling (compared to Q3 2009)	6	7	7	28	32	25	44	57	63	71 ▲
Expectation empty order book within one year (% yes)	8%	12%	8%	10%	4%	3%	3%	2%	3%	4%

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