



European Architectural Barometer Q2 2023

Sustainability

July, 2023

A product by **USP** Marketing Consultancy

About European Architectural Barometer

THE GOAL

The objective of the European Architectural Barometer is to offer profound insight into the current economic situation and trends among architectural firms in the Netherlands, Germany, the UK, France, Spain, Italy, Belgium and Poland. The European Architectural Barometer provides knowledge about the future building volumes and the way in which these building volumes will be realised (trends).

THE RESEARCH TOPICS

Recurring topic: Economic developments of architectural companies in Europe (order book and turnover development)

Quarterly theme topics in 2023:

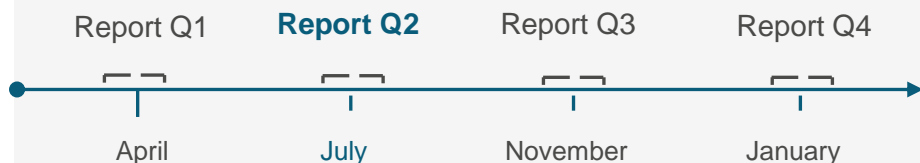
Q1: Media Orientation

Q2: Sustainability

Q3: Prefab

Q4: BIM

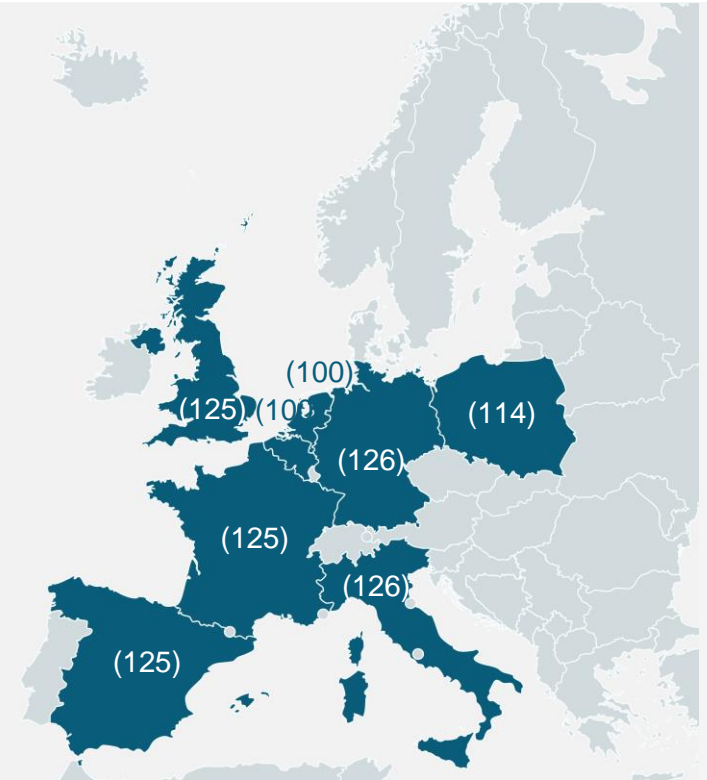
THE TIMELINE



COUNTRY SCOPE

(number of interviews conducted)

Background characteristics of the interviewed respondents can be found in [the country-specific profiling](#), [the architect chapter](#), and in [the appendix as a European overview](#).



PROJECT TEAM



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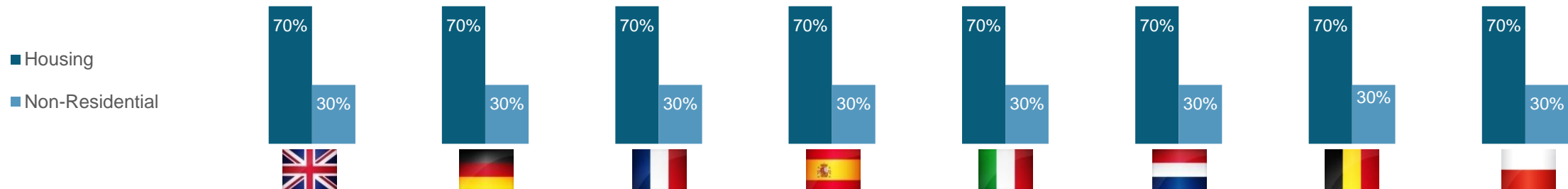
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Background of the architects

The table below shows the average number of employees of the architectural firms within the current quarter of this research, divided by country. The architectural firms with one employee were excluded from this research. The second table shows the segments in which architects within this research are mostly active.

Number of FTE								
Average	8.0	8.0	8.0	8.0	8.0	8.0	8.0	8.0
2 – 4 FTE	60%	60%	60%	60%	60%	60%	60%	60%
5 – 9 FTE	40%	40%	40%	40%	40%	40%	40%	40%
10 – 19 FTE	20%	20%	20%	20%	20%	20%	20%	20%
20 – 39 FTE	10%	10%	10%	10%	10%	10%	10%	10%
> 40 FTE	5%	5%	5%	5%	5%	5%	5%	5%

Segment mostly active



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Key insights and recommendations

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Summary of key topic

Economic developments

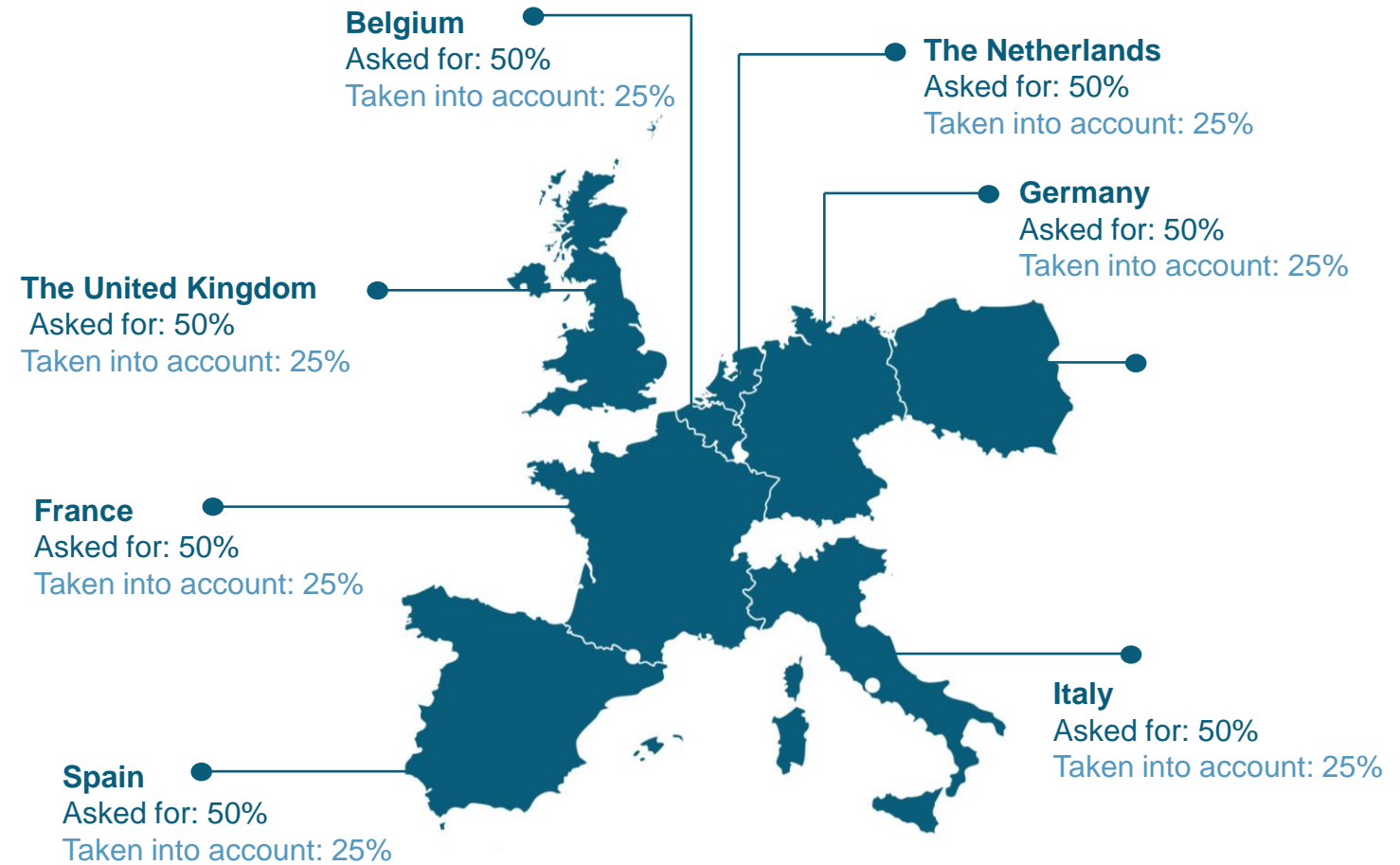
Sustainability

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...conclusion

- Sustainability is a hot topic already for years, and since investigating this topic, results show that in most projects throughout Europe sustainability in some form is at least discussed by different stakeholders in the project.
- And in many countries, especially the Netherlands and Belgium, building in a more sustainable way is considered and carried out in a large share of projects already.



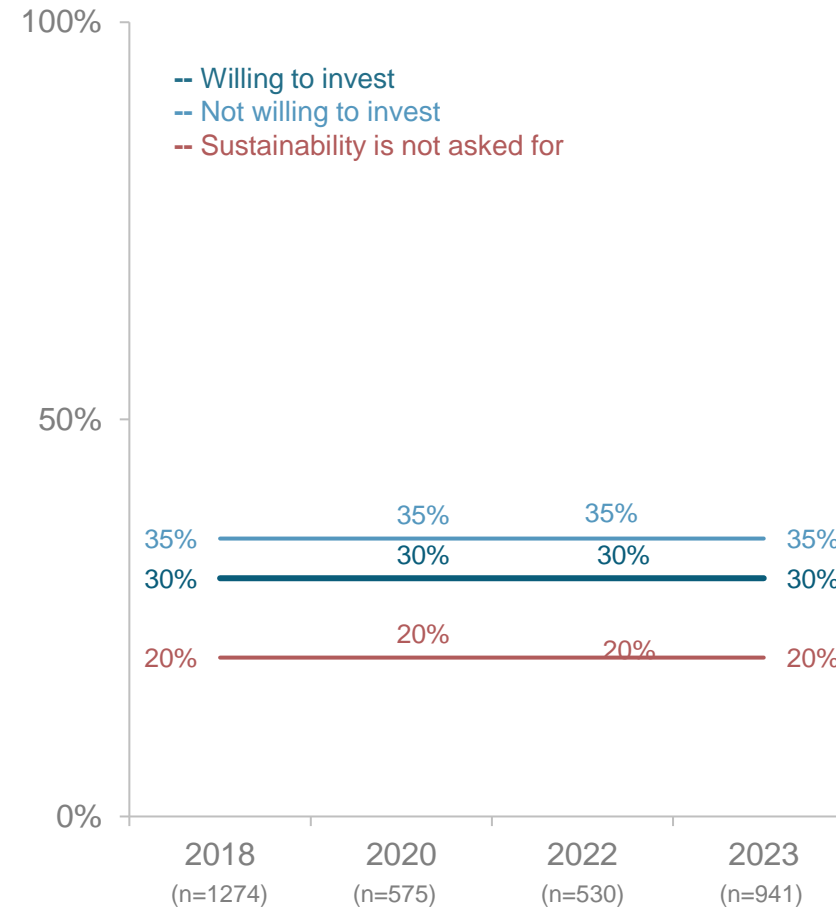
Total N = 941

...conclusion

- ...conclusion
- ...conclusion

Willingness to invest in **sustainability**

To what extent do your clients ask for sustainability and are they willing to invest more in it?

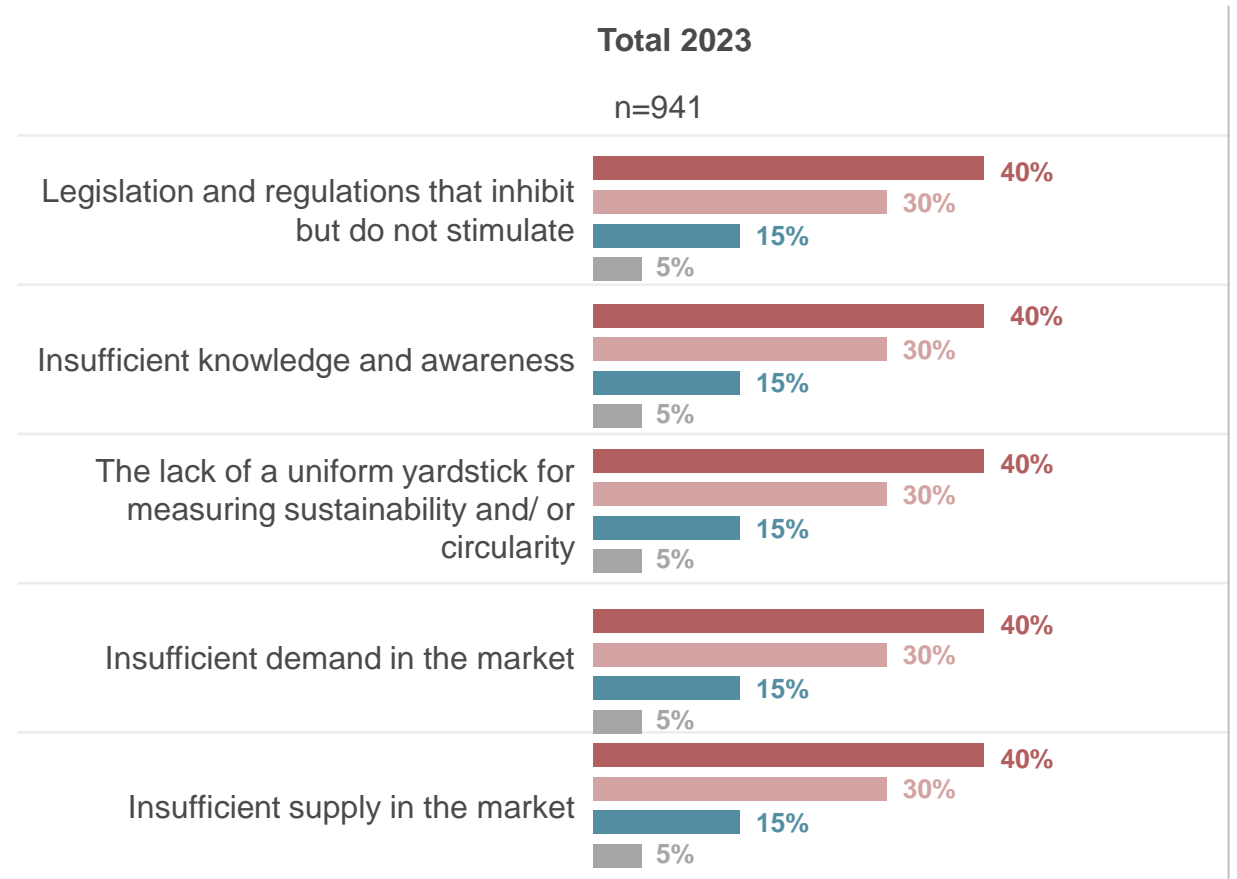


...conclusion

Obstacles for a sustainable and circular construction sector

To what extent do you see the following issues as a problem for the transition to a sustainable and circular construction sector?

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- ...conclusion



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Summary of key topic

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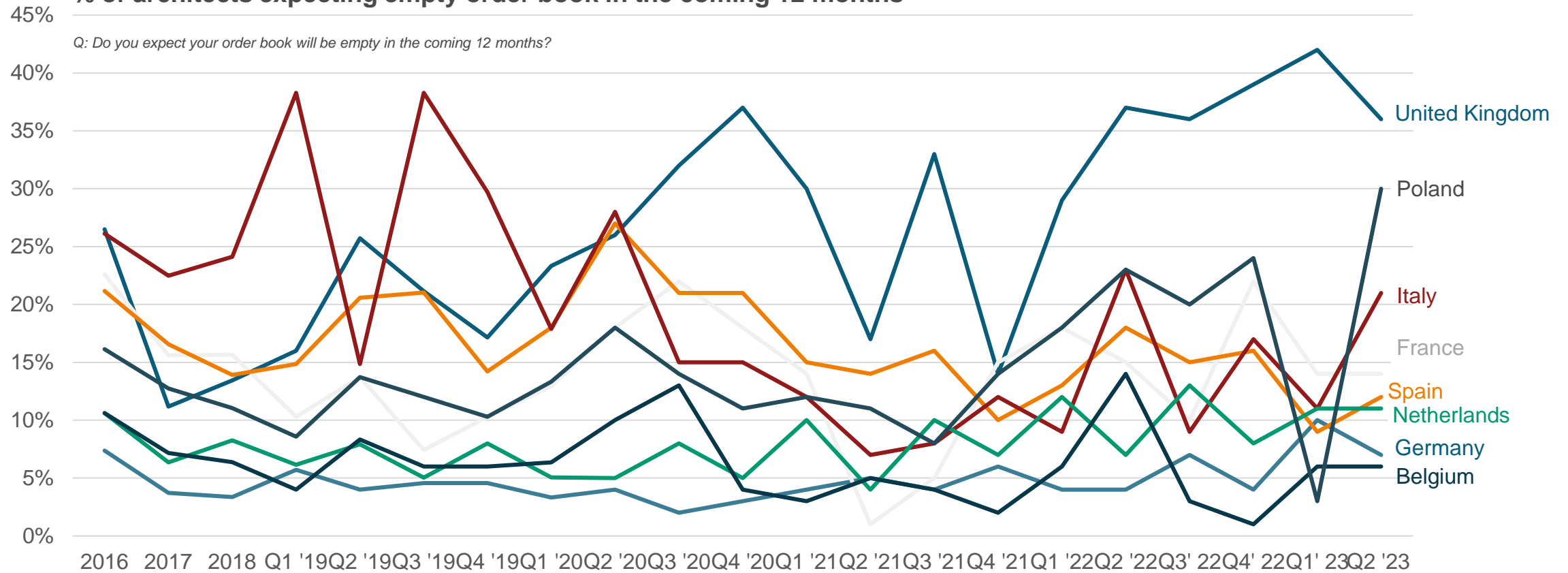
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...conclusion

% of architects expecting empty order book in the coming 12 months

Q: Do you expect your order book will be empty in the coming 12 months?

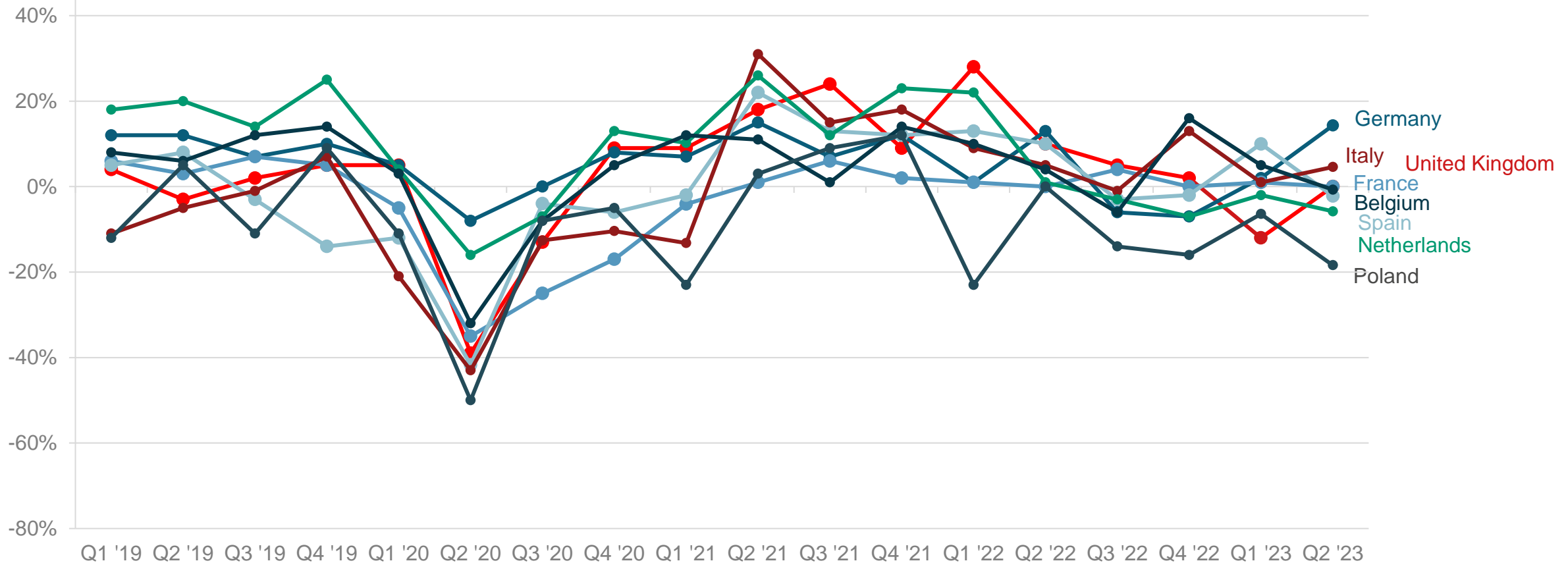


...conclusion

Architects' experience regarding their turnover

(saldo of architects reporting increase minus architects reporting a decrease)

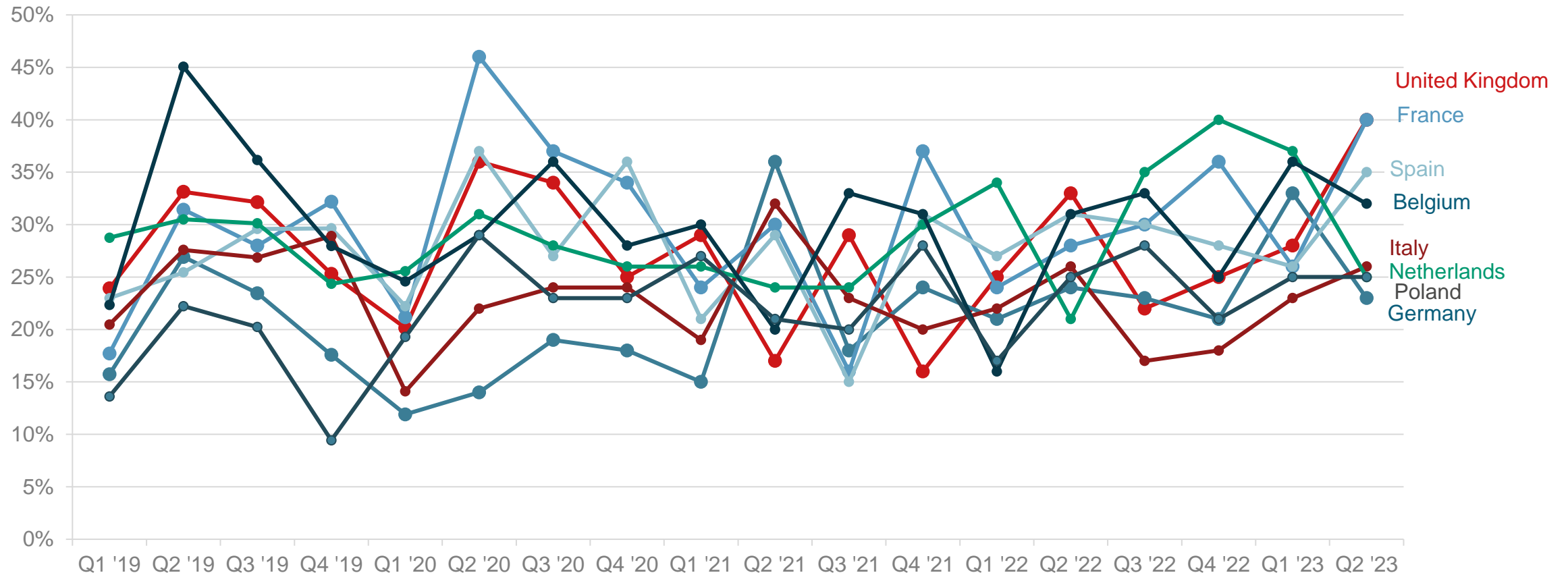
Q: How did your turnover develop in the past quarter compared to the same period one year ago?



...conclusion

% of architects experiencing cancelled projects

Q: How many projects have been cancelled in the past quarter?

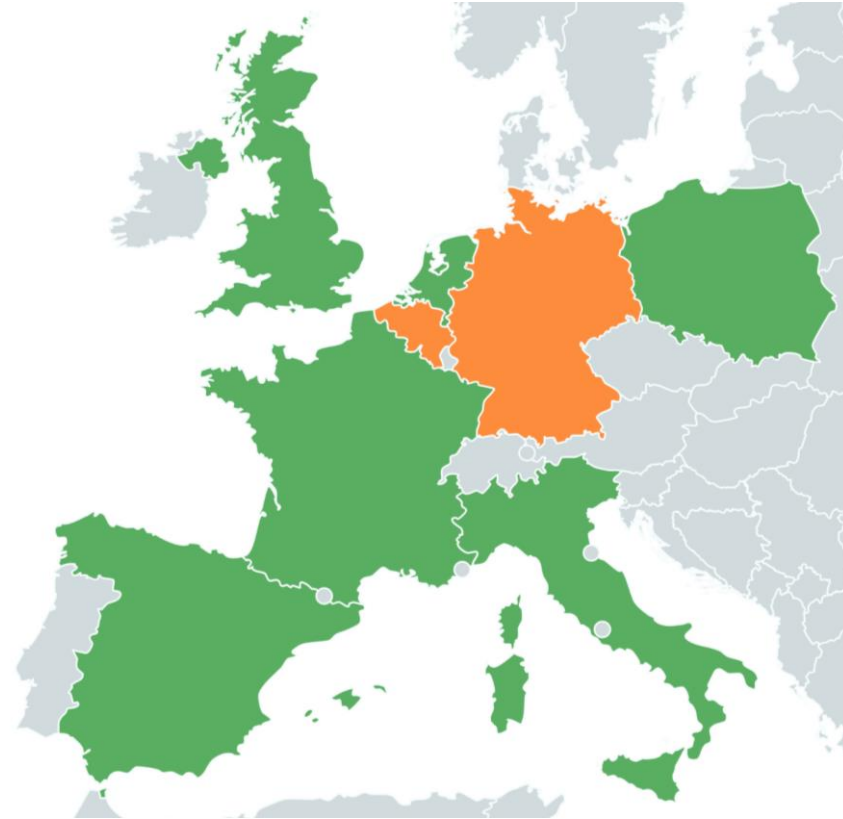


...conclusion



- See the country slides for more detailed information on the developments per construction segment.
- Volumes are in billion euros at 2013 prices.

...conclusion



- See the country slides for more detailed information on the developments per construction segment.
- Volumes are in billion euros at 2013 prices.

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Key insights and recommendations

Economic developments

United Kingdom

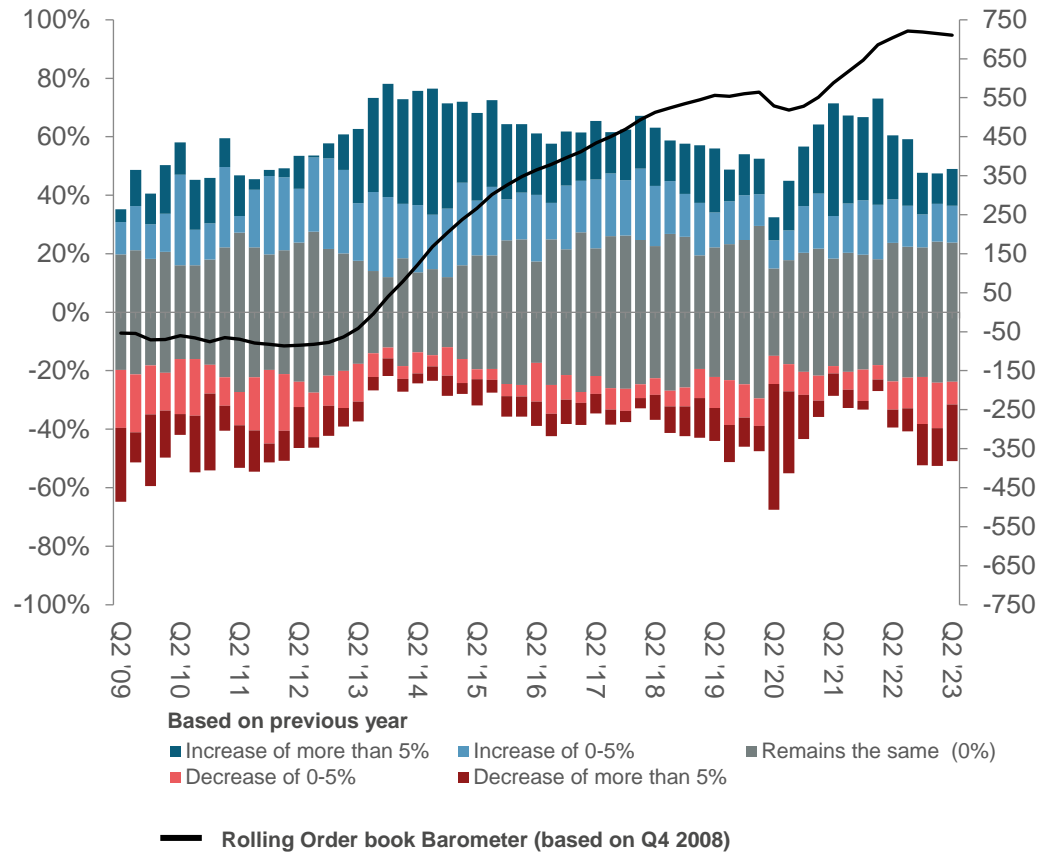
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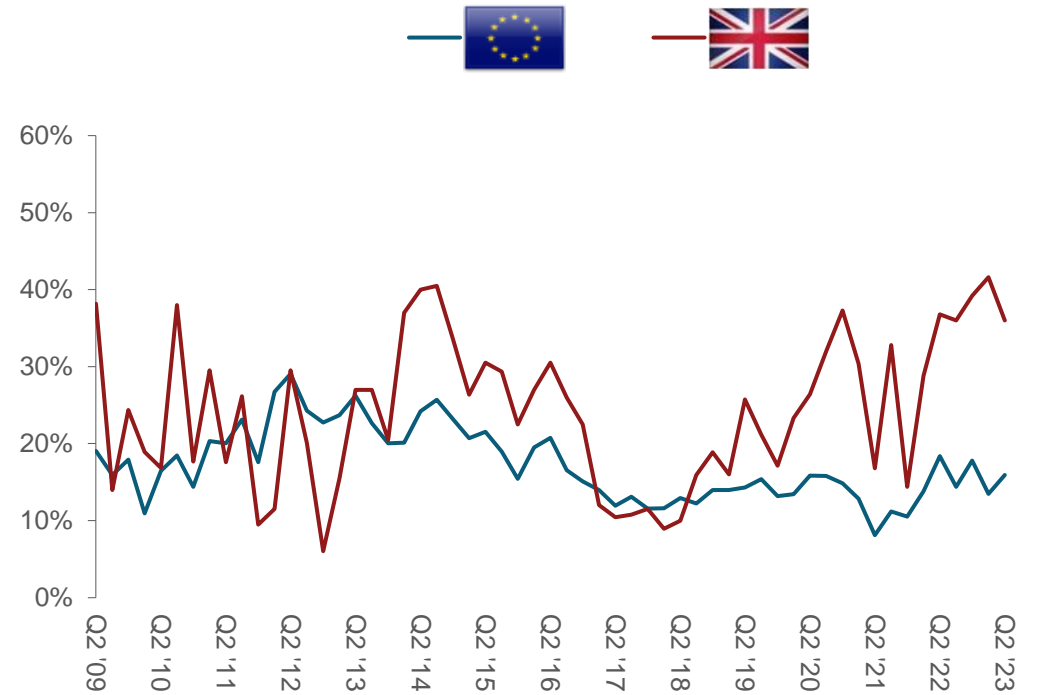


...conclusion

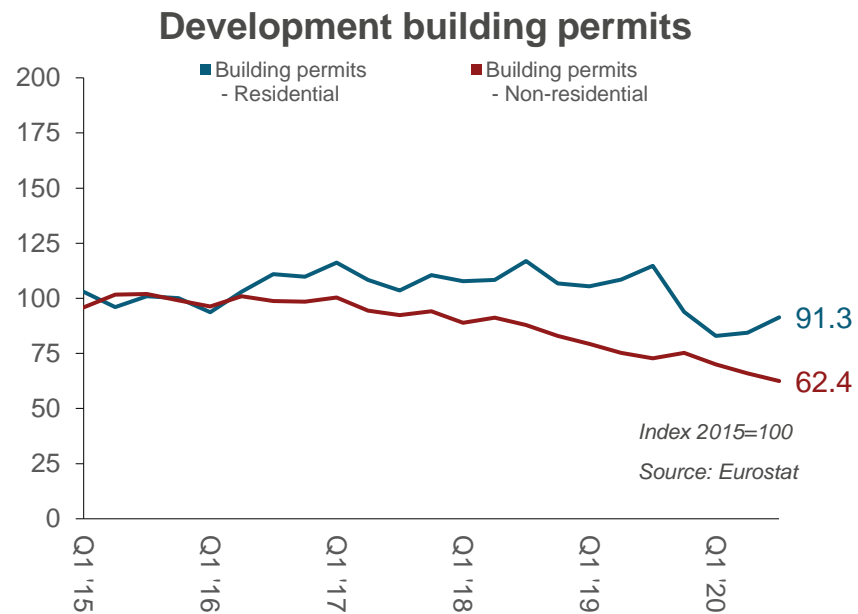
Development of order book



Expecting empty order book in 12 months



...conclusion



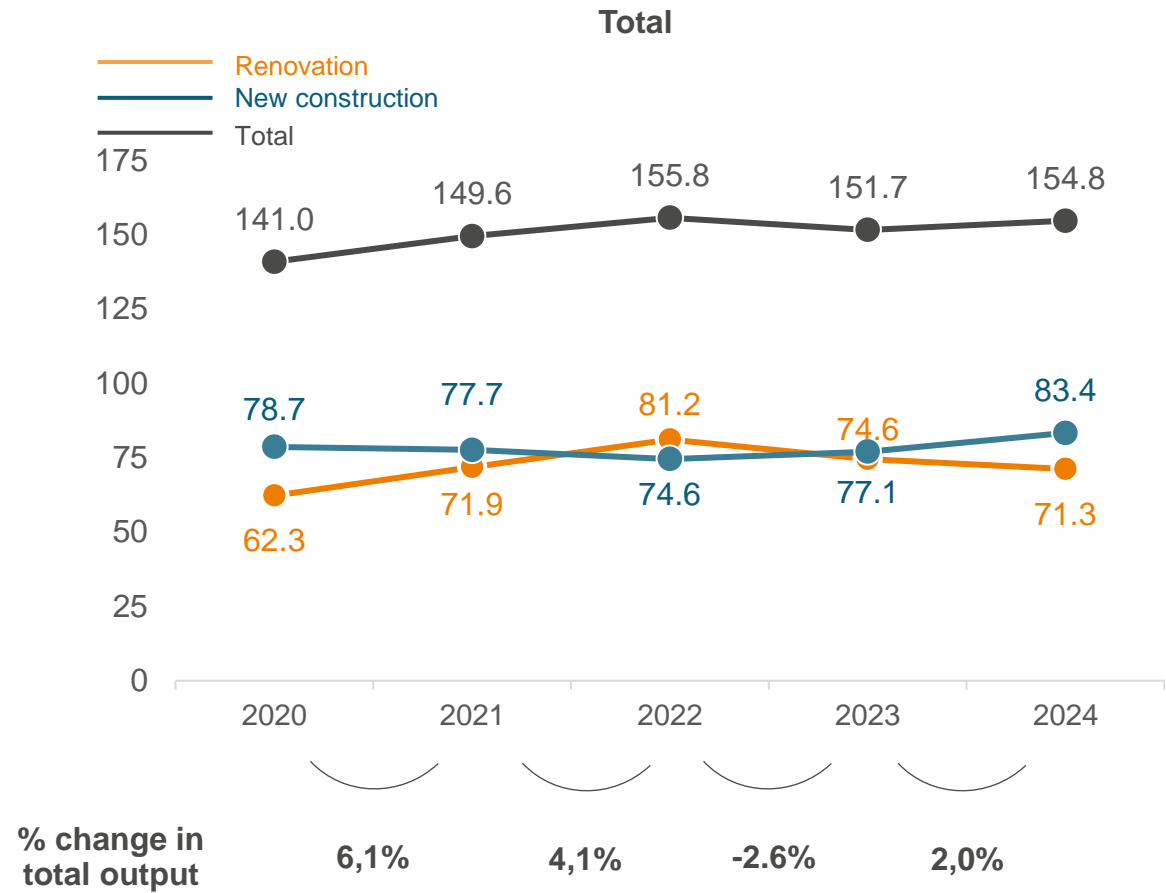
Economic and construction related indicators	Value Q2 2022	Value Q1 2023	Value Q2 2023	Q-2-Q development
GDP (quarterly growth rate) (%)*	0.2	0.1	0.2	Positive
Consumer confidence indicator**	n/a	n/a	n/a	
Industrial confidence indicator**	n/a	n/a	n/a	
Construction confidence indicator**	n/a	n/a	n/a	
Production value buildings (index 2015=100)**	n/a	n/a	n/a	
Architects with postponed projects (%)***	50	50	54	Negative
Architects with cancelled projects (%)***	34	28	40	Negative
Building permits residential (index 2015=100)**	n/a	n/a	n/a	
Building permits non-residential (index 2015=100)**	n/a	n/a	n/a	

Source: * Country statistical office; ** Eurostat, *** Arch-Vision

*Since the end of 2020 UK data has not been published anymore. The data previously provided to Eurostat was an amalgamation of several administrative data sources used as a proxy. The series was discontinued in 2020 when most of the data sources used to produce the estimate were discontinued due to the COVID-19 pandemic and resources were diverted elsewhere.

...conclusion

(% change year over year)



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Germany

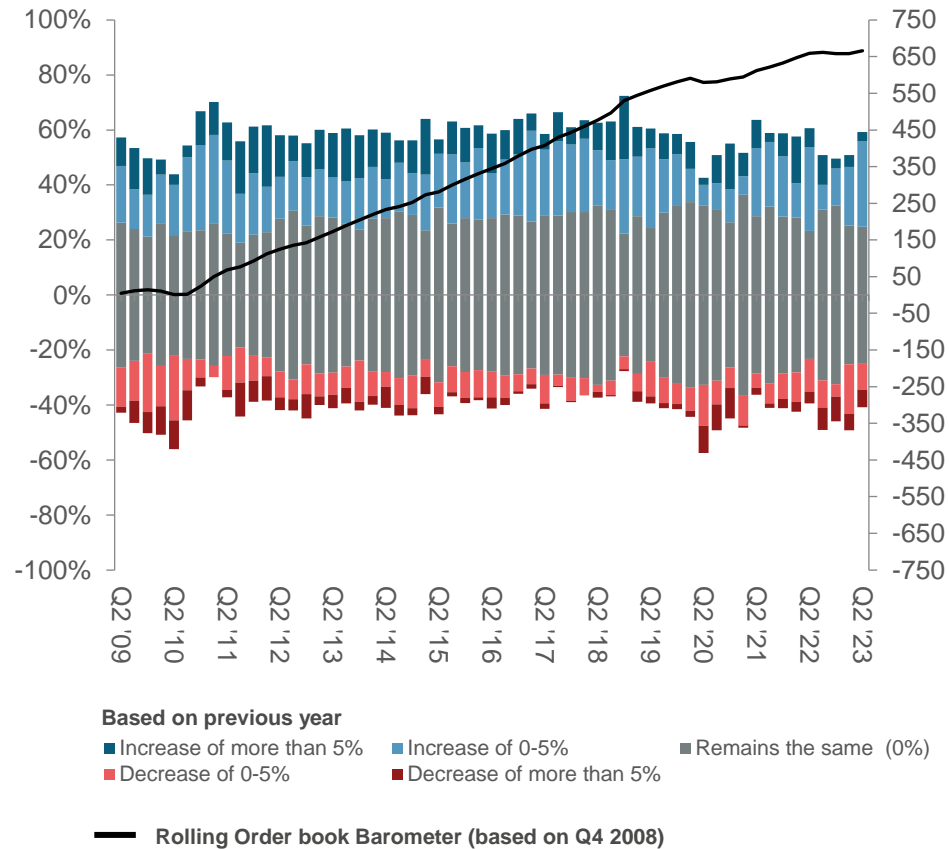
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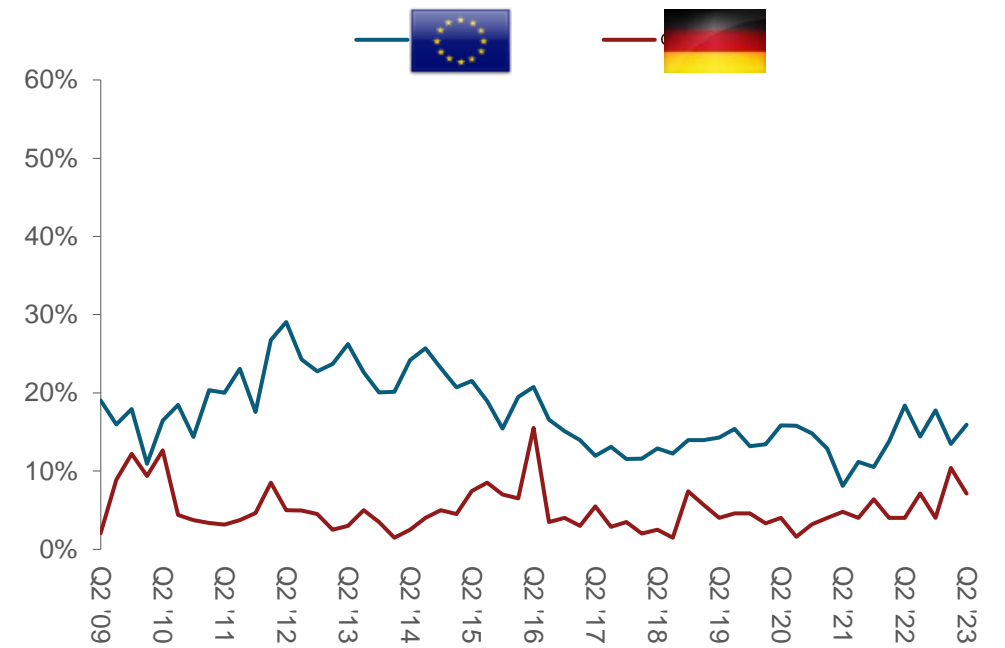


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Development of order book

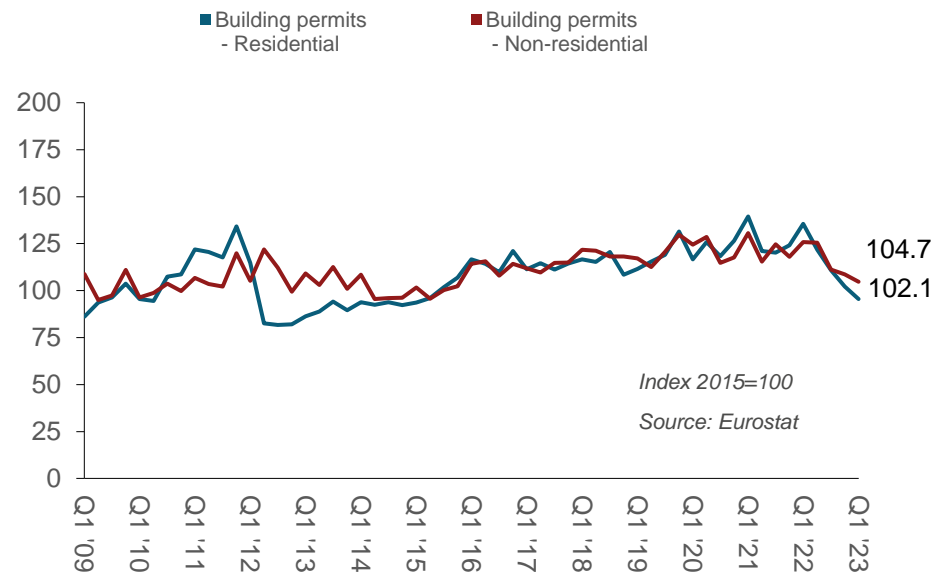


Expecting empty order book in 12 months



...conclusion

Development building permits

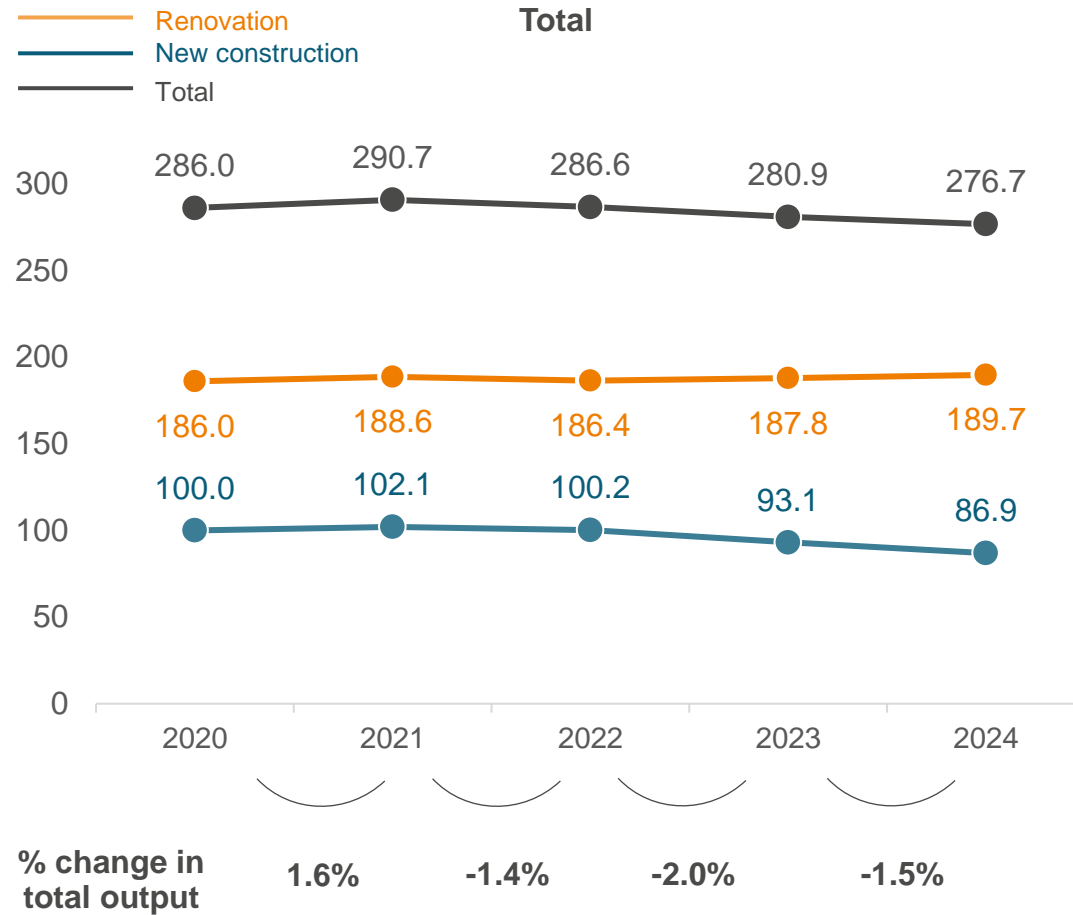


Economic and construction related indicators	Value Q2 2022	Value Q1 2023	Value Q2 2023	Q-2-Q development
GDP (quarterly growth rate) (%)*	0.1	-0.1	0.0	Positive
Consumer confidence indicator**	-19.0	-17.4	-13.3	Positive
Industrial confidence indicator**	15.7	2.1	-5.2	Negative
Construction confidence indicator**	5.7	-3.2	-8.9	Negative
Production value buildings (index 2015=100)**	110.8	114.9	108.7	Negative
Architects with postponed projects (%)***	49	45	39	Positive
Architects with cancelled projects (%)***	24	33	23	Positive
Building permits residential (index 2015=100)**	122.7	102.3	102.1	Equal
Building permits non-residential (index 2015=100)**	125.4	110.0	104.7	Negative

Source: * Country statistical office; ** Eurostat, *** Arch-Vision

...conclusion

(% change year over year)



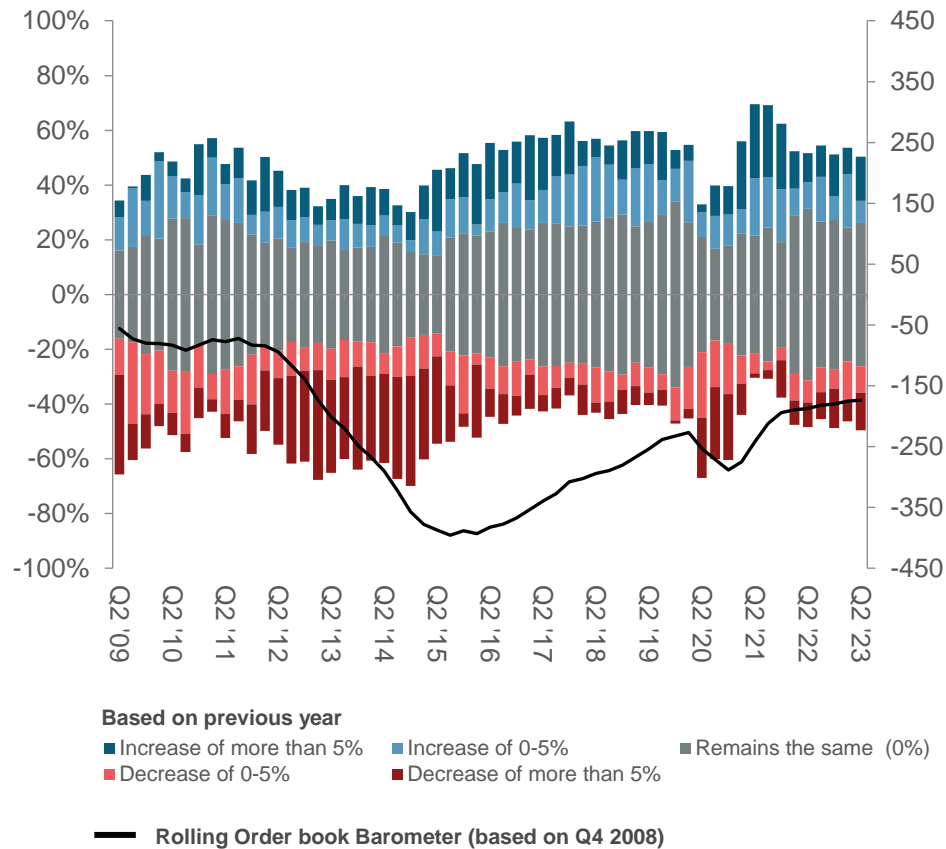
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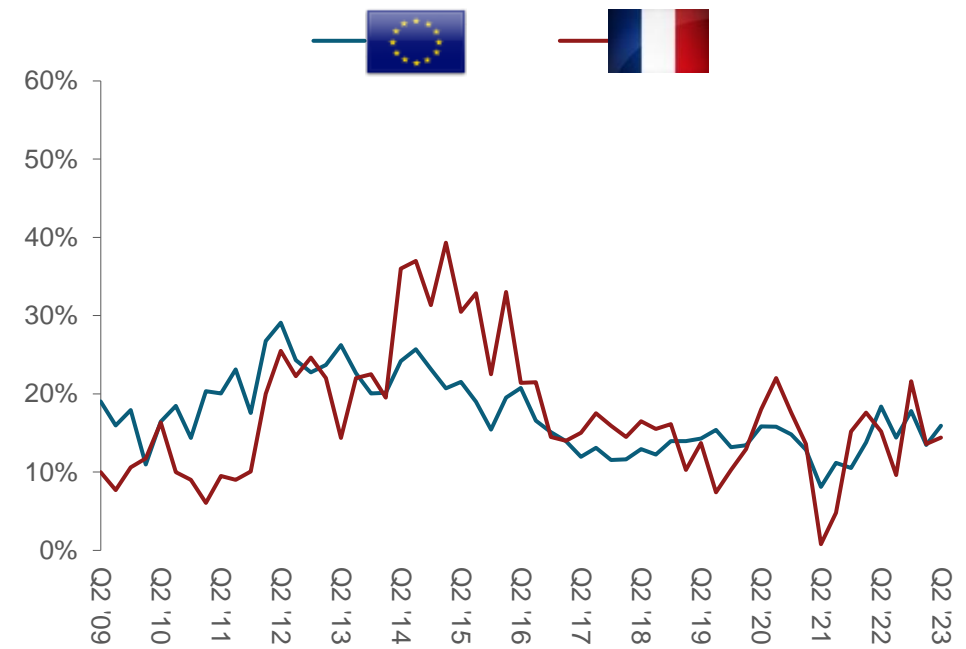


...conclusion

Development of order book

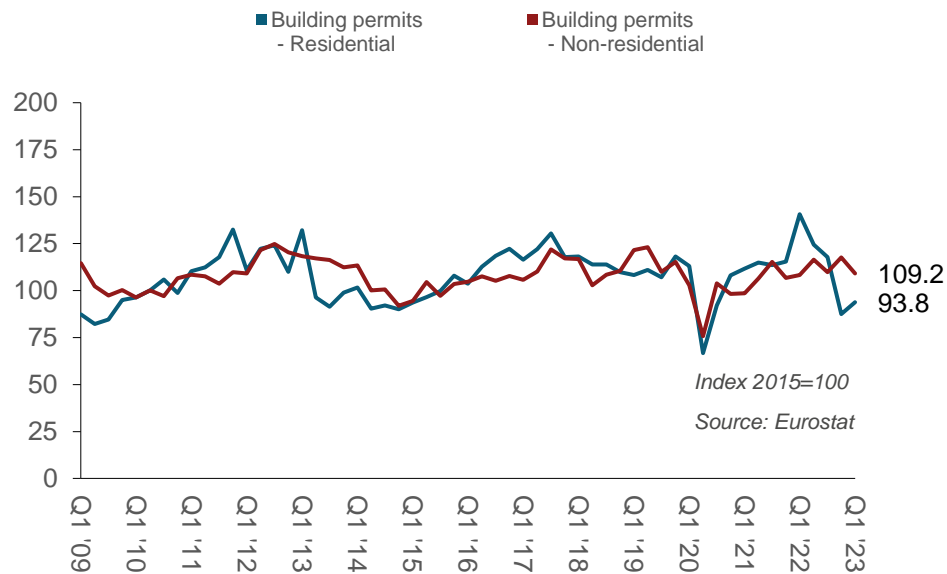


Expecting empty order book in 12 months



...conclusion

Development building permits

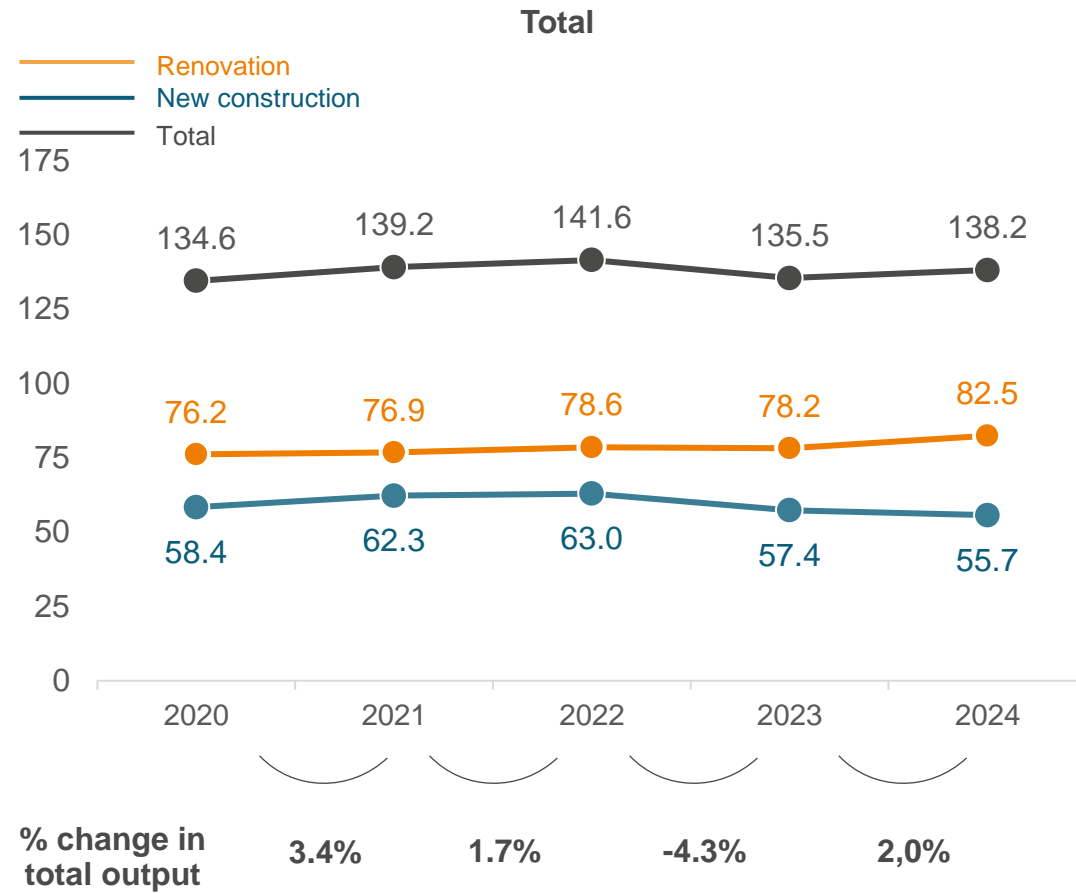


Economic and construction related indicators	Value Q2 2022	Value Q1 2023	Value Q2 2023	Q-2-Q development
GDP (quarterly growth rate) (%)*	0.5	0.1	0.5	Positive
Consumer confidence indicator**	-19.7	-20.8	-17.0	Positive
Industrial confidence indicator**	-0.1	-5.7	-9.3	Negative
Construction confidence indicator**	5.2	0.9	-1.6	Negative
Production value buildings (index 2015=100)**	96.9	104.2	104.9	Equal
Architects with postponed projects (%)***	46	44	45	Equal
Architects with cancelled projects (%)***	28	26	40	Negative
Building permits residential (index 2015=100)**	123.3	86.1	93.8	Positive
Building permits non-residential (index 2015=100)**	117.2	117.9	109.2	Negative

Source: * Country statistical office; ** Eurostat, *** Arch-Vision

...conclusion

(% change year over year)



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Spain

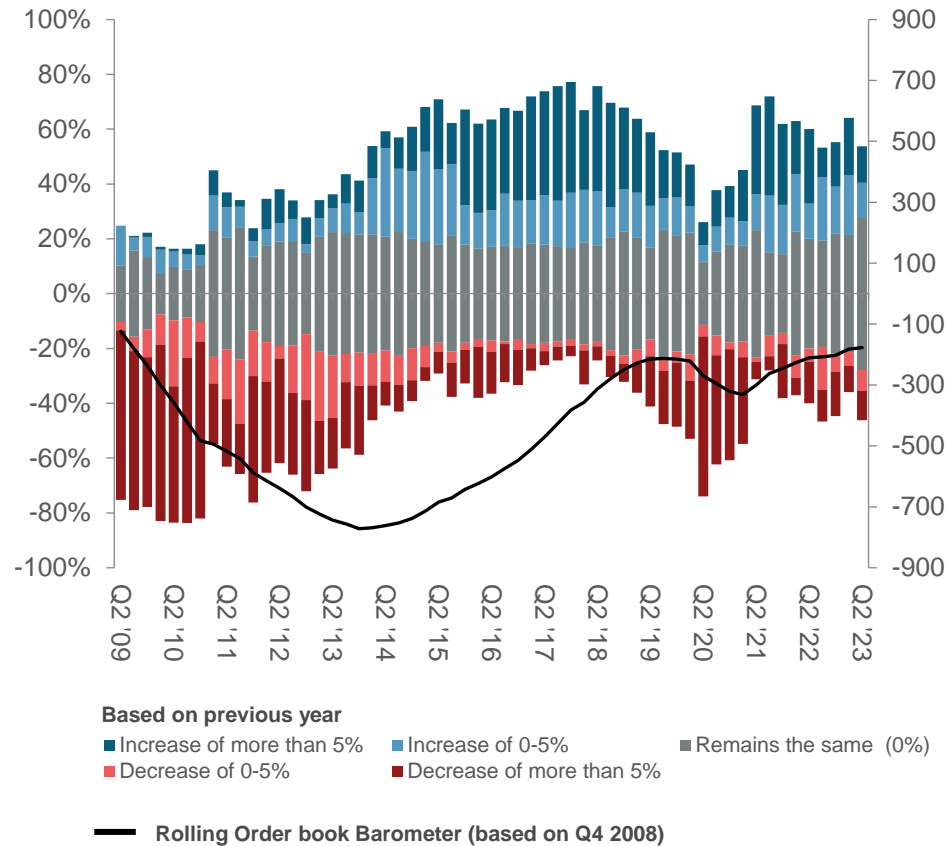
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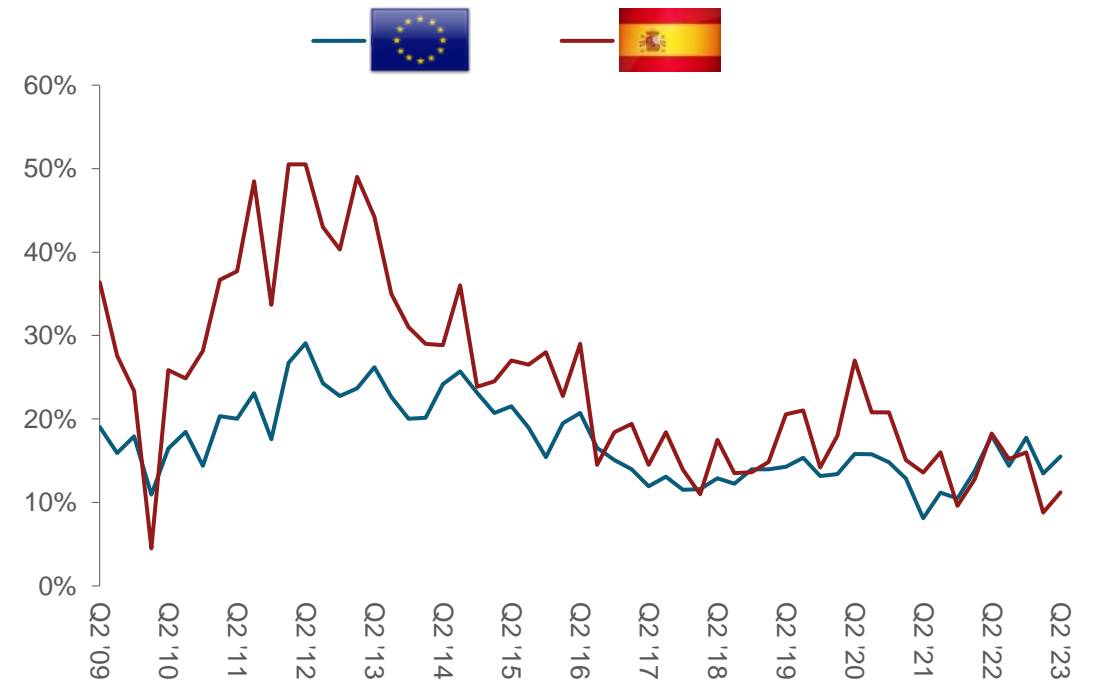


...conclusion

Development of order book

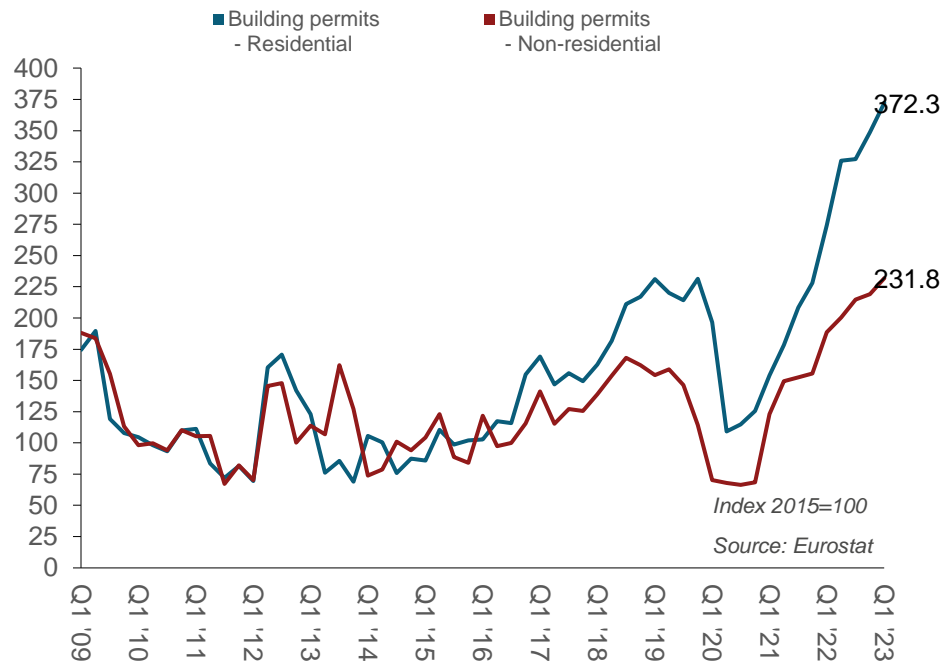


Expecting empty order book in 12 months



...conclusion

Development building permits

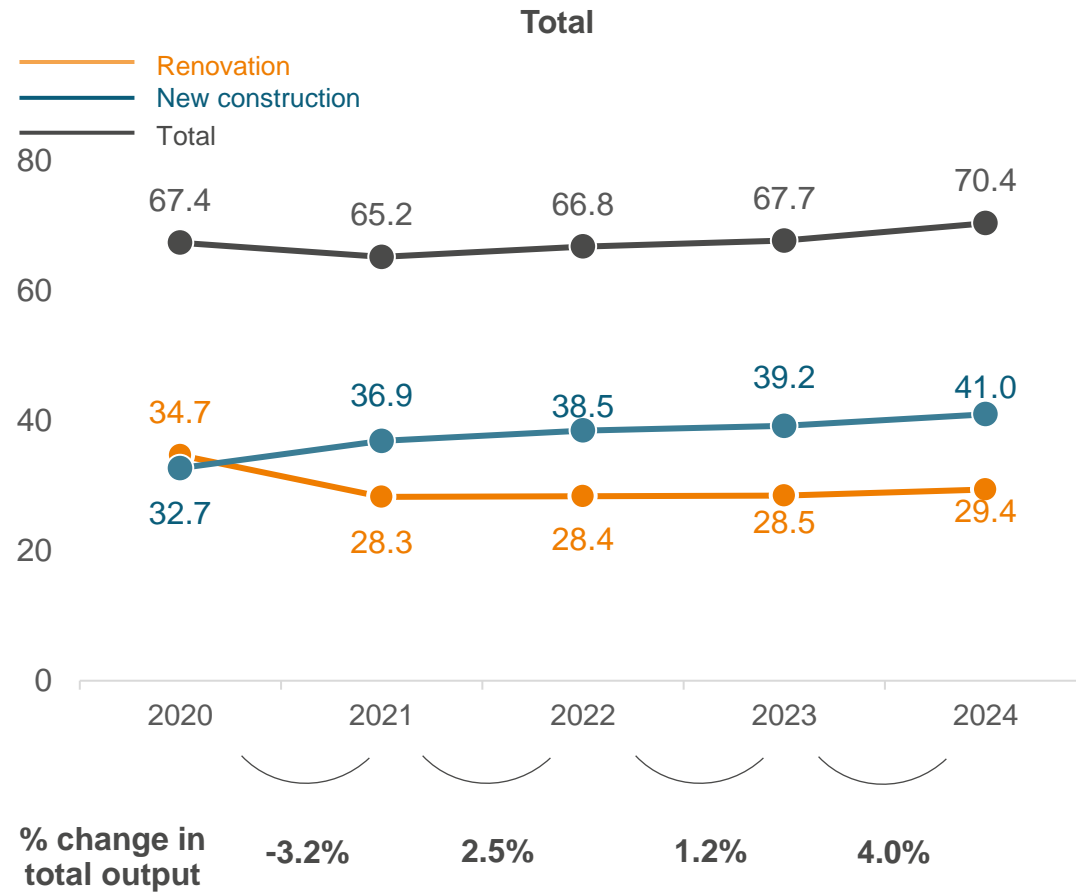


Economic and construction related indicators ³⁷	Value Q2 2022	Value Q1 2023	Value Q2 2023	Q-2-Q development
GDP (quarterly growth rate) (%) [*]	1.5	0.5	0.4	Negative
Consumer confidence indicator ^{**}	-26.2	-23.0	-18.8	Positive
Industrial confidence indicator ^{**}	0.8	-4.2	-5.3	Negative
Construction confidence indicator ^{**}	10.9	3.1	13.3	Positive
Production value buildings (index 2015=100) ^{**}	79.2	78.1	83.4	Positive
Architects with postponed projects (%) ^{***}	41	38	40	Negative
Architects with cancelled projects (%) ^{***}	31	26	34	Negative
Building permits residential (index 2015=100) ^{**}	325.9	348.7	372.3	Positive
Building permits non-residential (index 2015=100) ^{**}	200.4	219.0	231.8	Positive

Source: ^{*} Country statistical office; ^{**} Eurostat, ^{***} Arch-Vision

...conclusion

(% change year over year)



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Italy

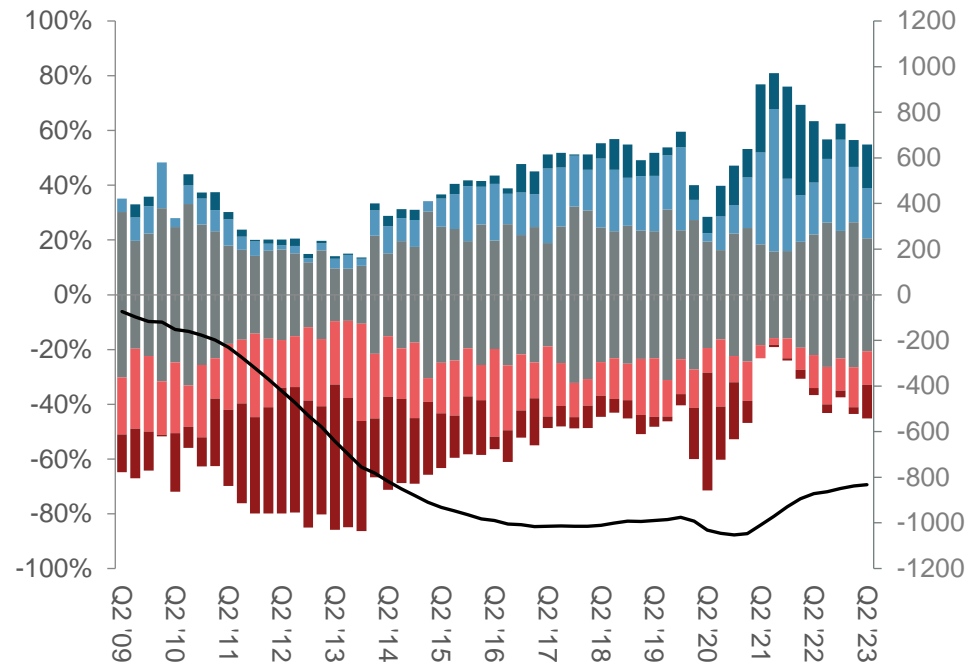
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Development of order book

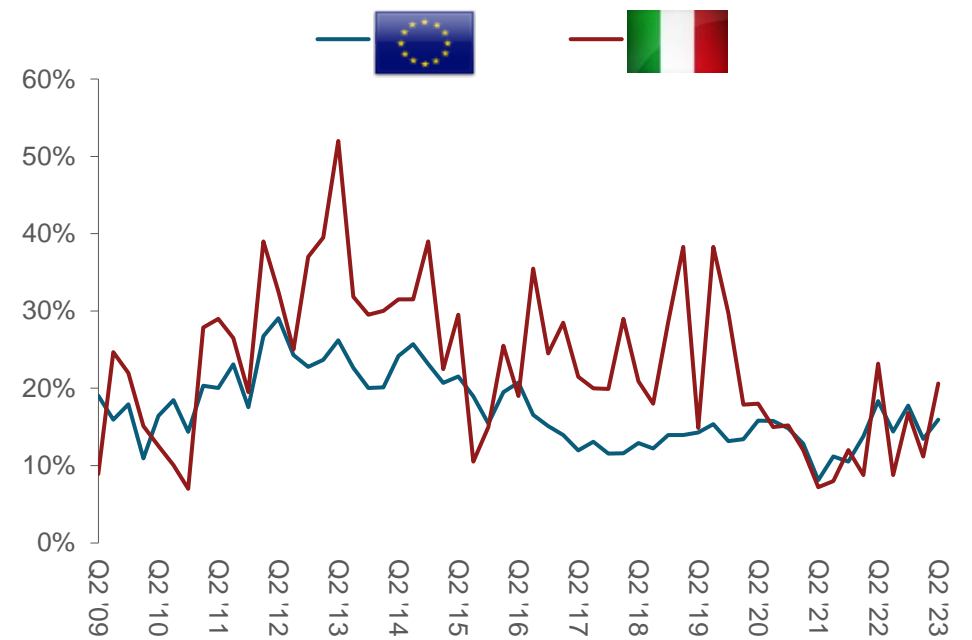


Based on previous year

- Increase of more than 5%
- Increase of 0-5%
- Remains the same (0%)
- Decrease of 0-5%
- Decrease of more than 5%

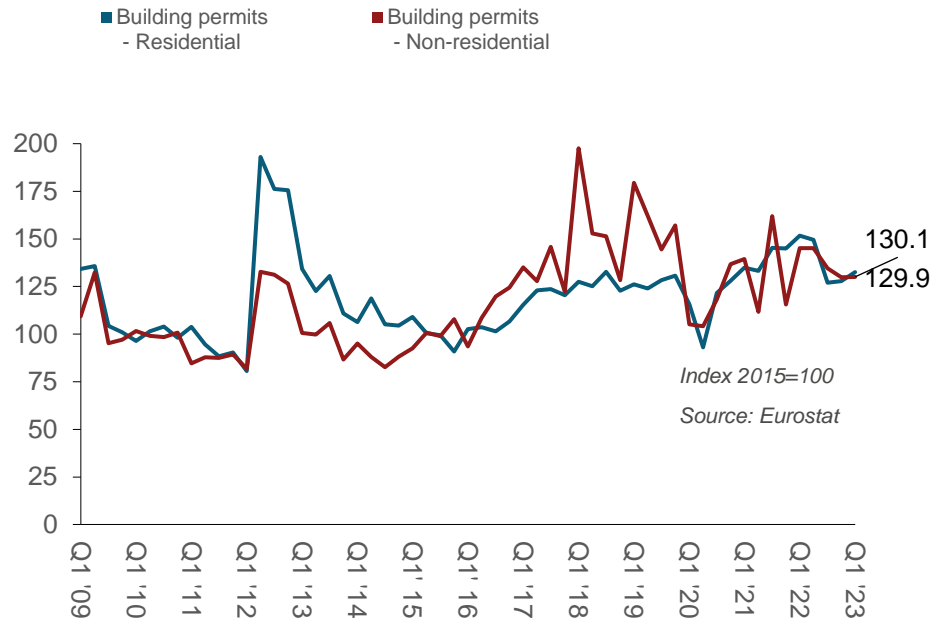
— Rolling Order book Barometer (based on Q4 2008)

Expecting empty order book in 12 months



...conclusion

Development building permits



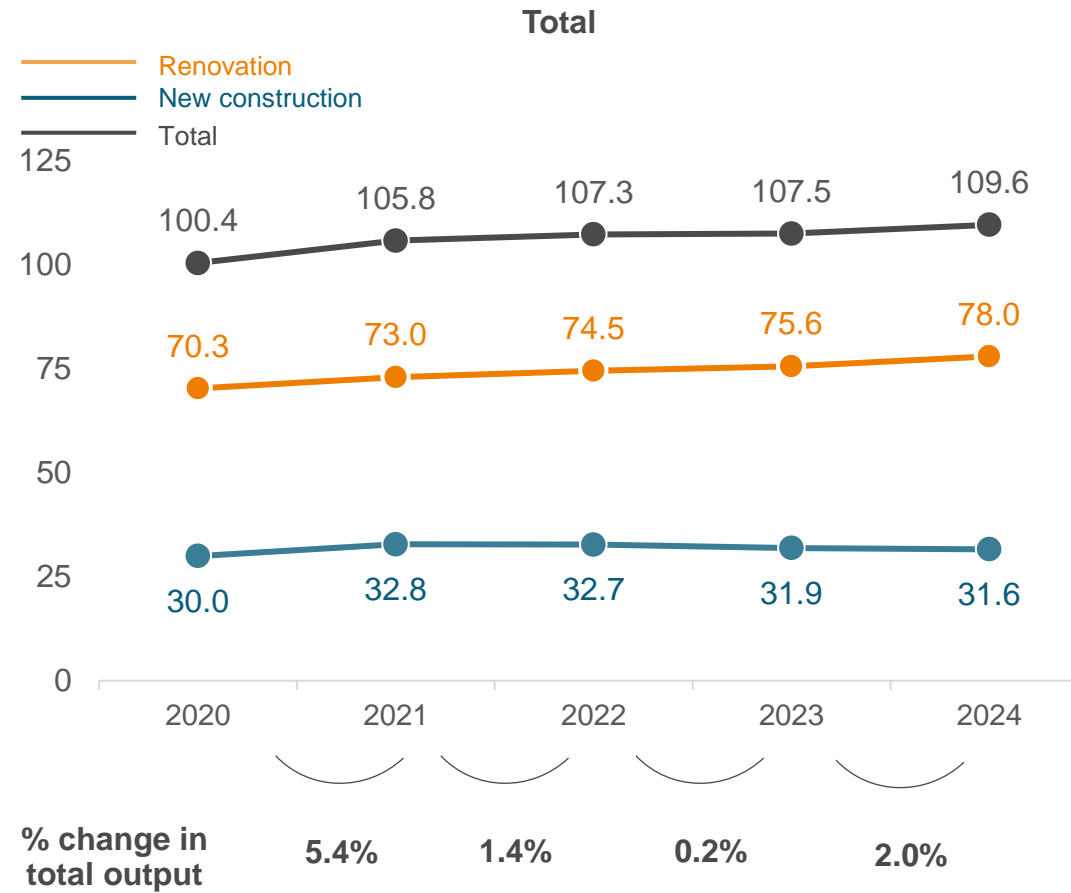
Economic and construction related indicators	Value Q2 2022	Value Q1 2023	Value Q2 2023	Q-2-Q development
GDP (quarterly growth rate) (%)*	1.1	0.6	-0.3	Negative
Consumer confidence indicator**	-22.6	-16.3	-15.7	Positive
Industrial confidence indicator**	4.0	-1.4	-3.9	Negative
Construction confidence indicator**	5.0	4.1	6.7	Positive
Production value buildings (index 2015=100)**	135.2	138.6	131.6	Negative
Architects with postponed projects (%)***	46	42	44	Negative
Architects with cancelled projects (%)***	27	23	26	Negative
Building permits residential (index 2015=100)**	155.1	129.3	130.1	Equal
Building permits non-residential (index 2015=100)**	149.2	139.3	129.9	Negative

Source: * Country statistical office; ** Eurostat, *** Arch-Vision

Note: No data about the production of buildings in Italy. Only aggregated data for the construction sector as a whole (buildings & civil engineering works) available.

...conclusion

(% change year over year)



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Netherlands

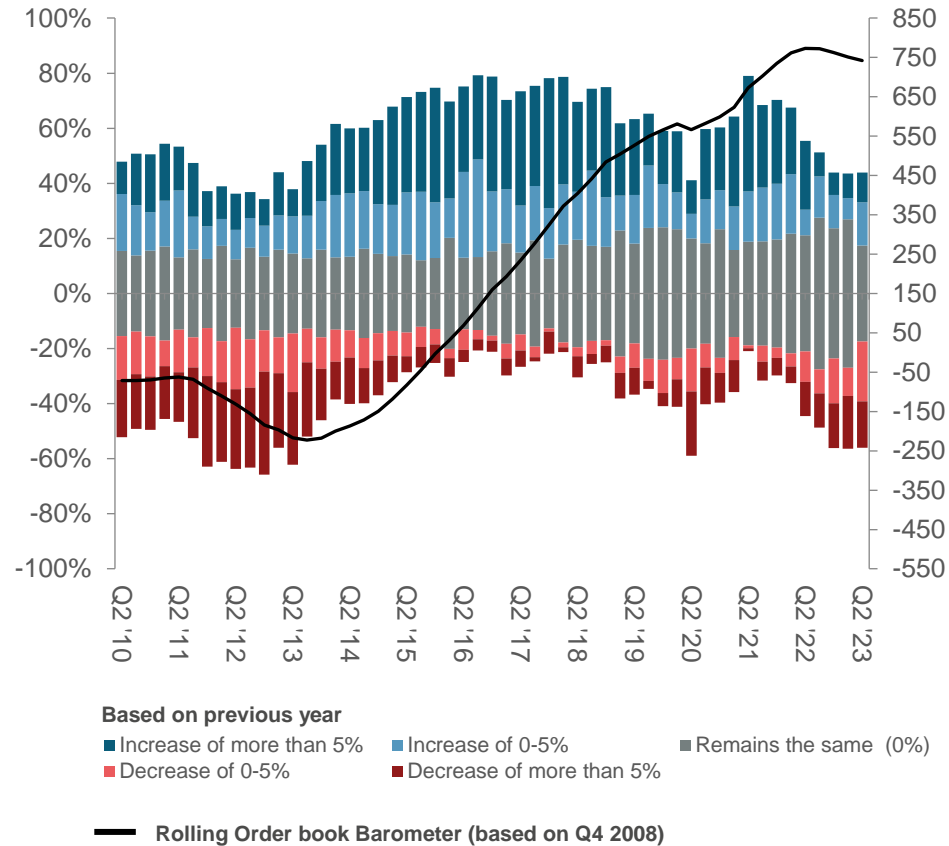
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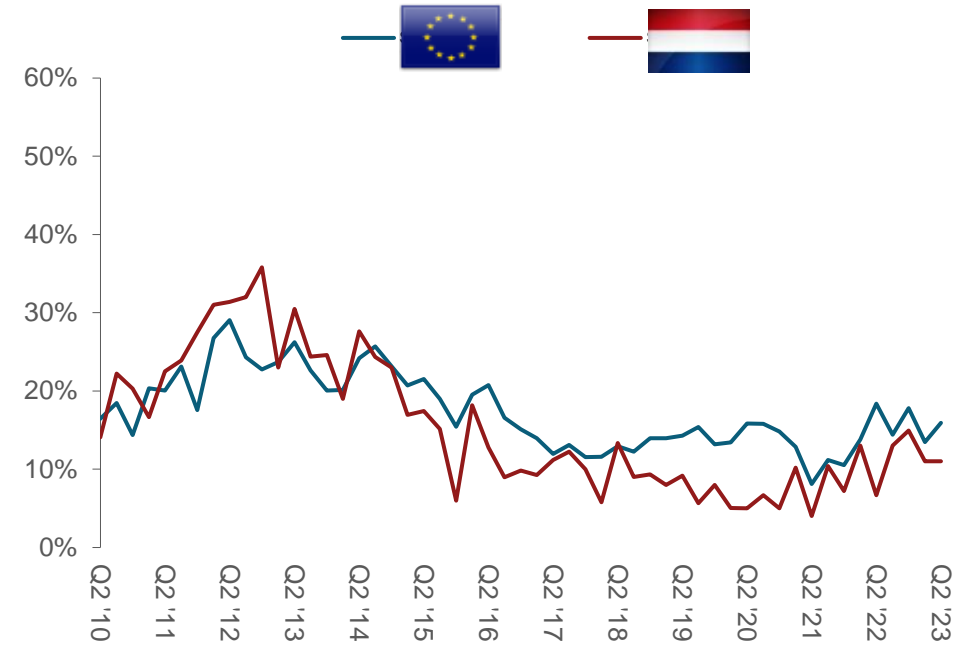


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Development of order book

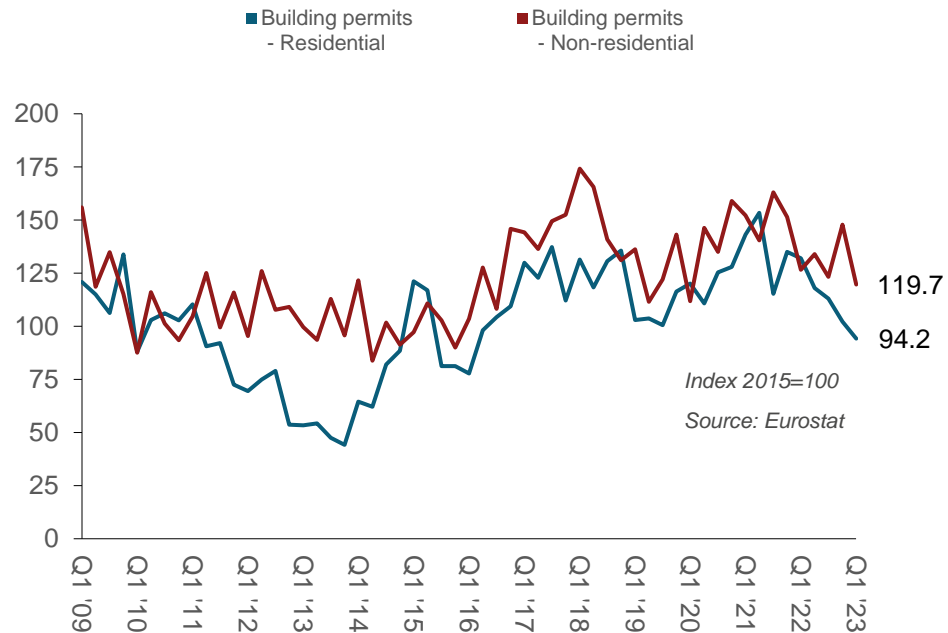


Expecting empty order book in 12 months



...conclusion

Development building permits



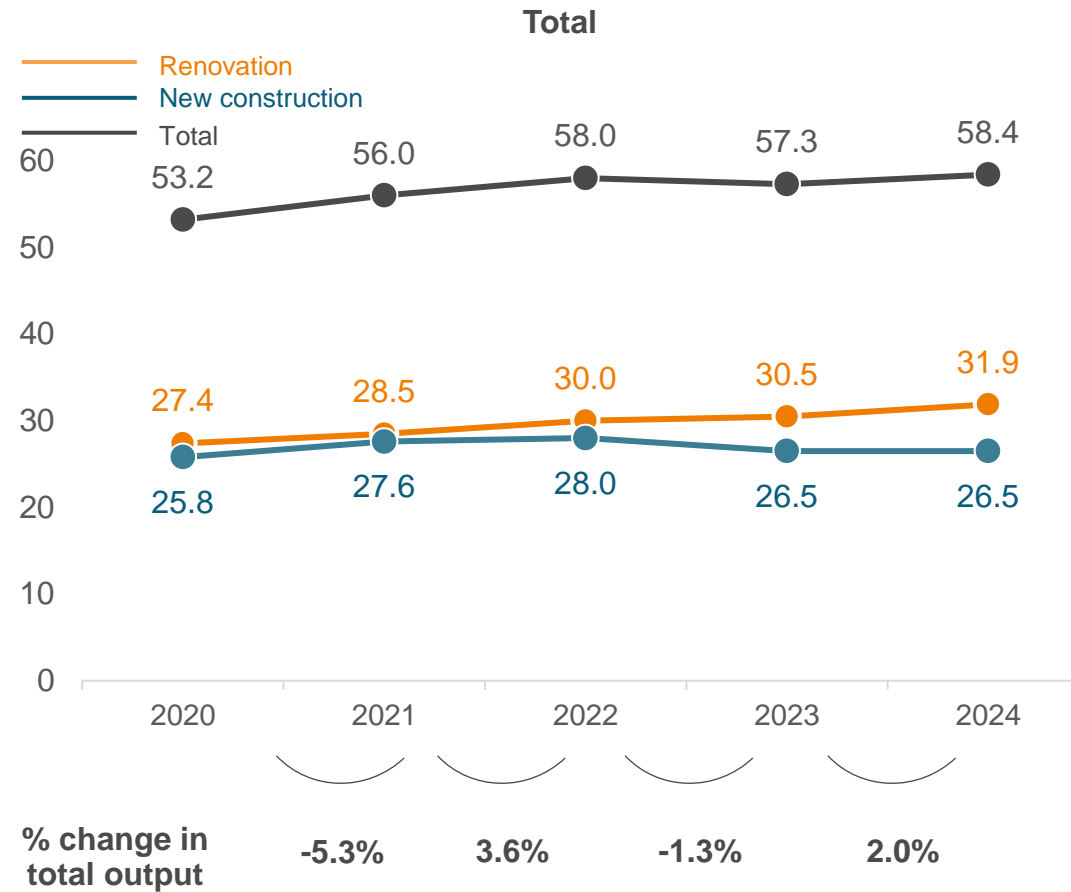
Economic and construction related indicators	Value Q2 2022	Value Q1 2023	Value Q2 2023	Q-2-Q development
GDP (quarterly growth rate) (%)*	2.6	-0.4	-0.3	Positive
Consumer confidence indicator**	-25.8	-20.0	-18.7	Positive
Industrial confidence indicator**	6.4	1.2	-1.0	Negative
Construction confidence indicator**	14.1	10.2	5.2	Negative
Production value buildings (index 2015=100)**	134.8	141.6	146.6	Positive
Architects with postponed projects (%)***	45	41	44	Negative
Architects with cancelled projects (%)***	21	37	25	Positive
Building permits residential (index 2015=100)**	112.4	129.3	94.2	Negative
Building permits non-residential (index 2015=100)**	130.3	152.9	119.7	Negative

Source: * Country statistical office; ** Eurostat, *** Arch-Vision

Note: No data about the production of buildings in the Netherlands. Only aggregated data for the construction sector as a whole (buildings & civil engineering works) available.

...conclusion

(% change year over year)



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Belgium

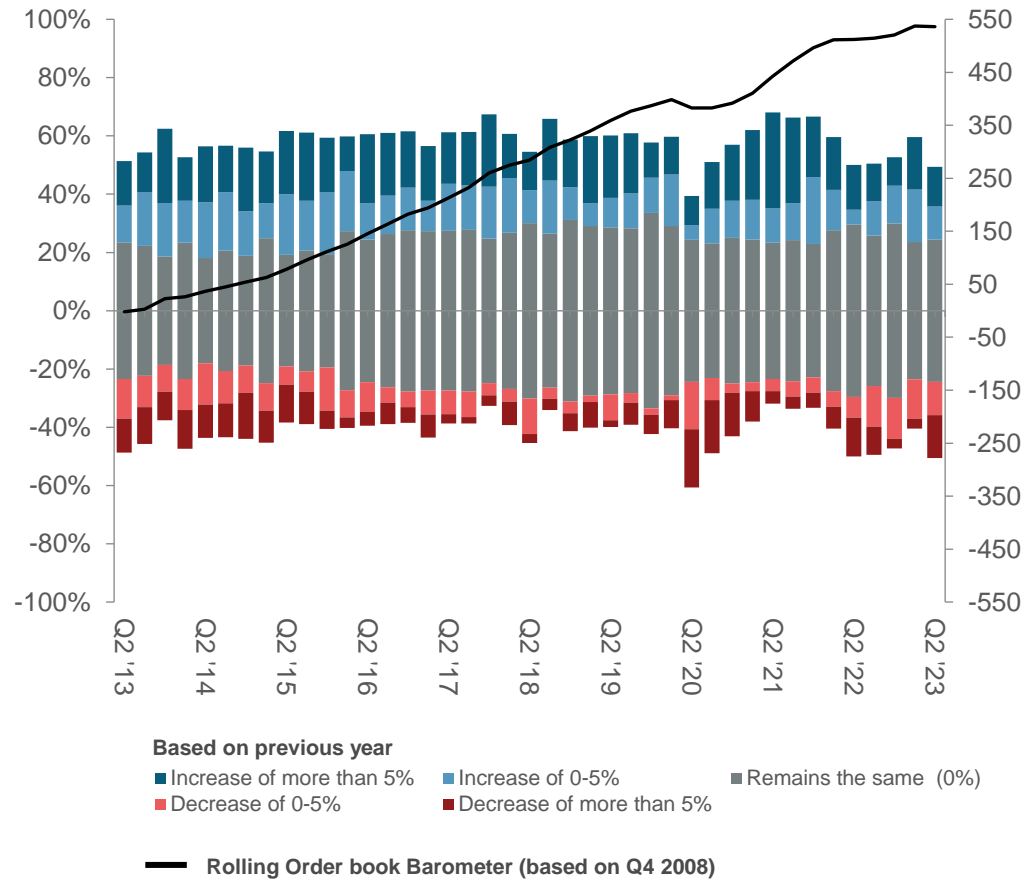
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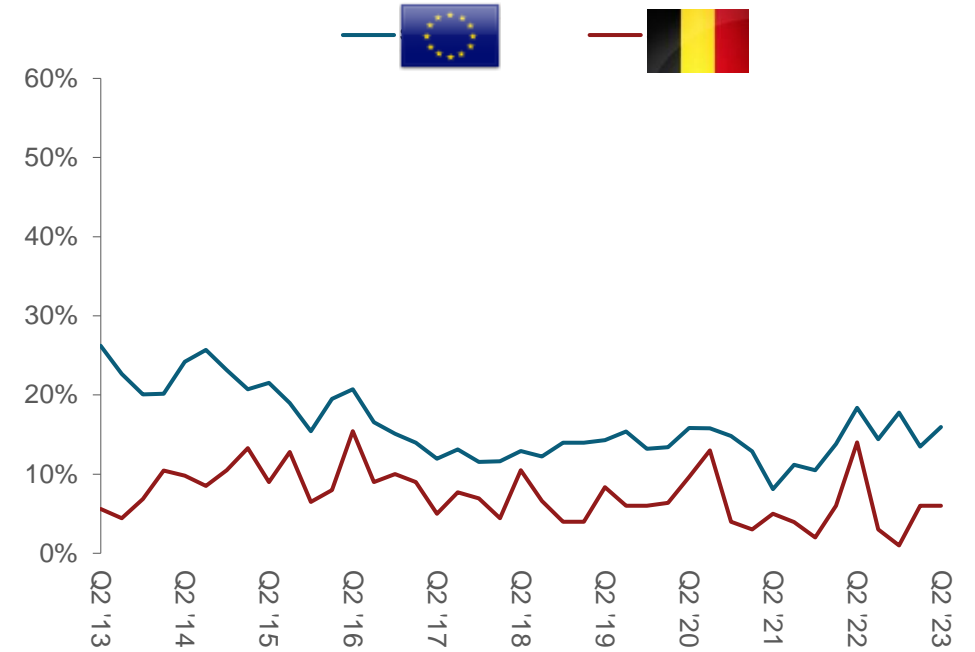


...conclusion

Development of order book

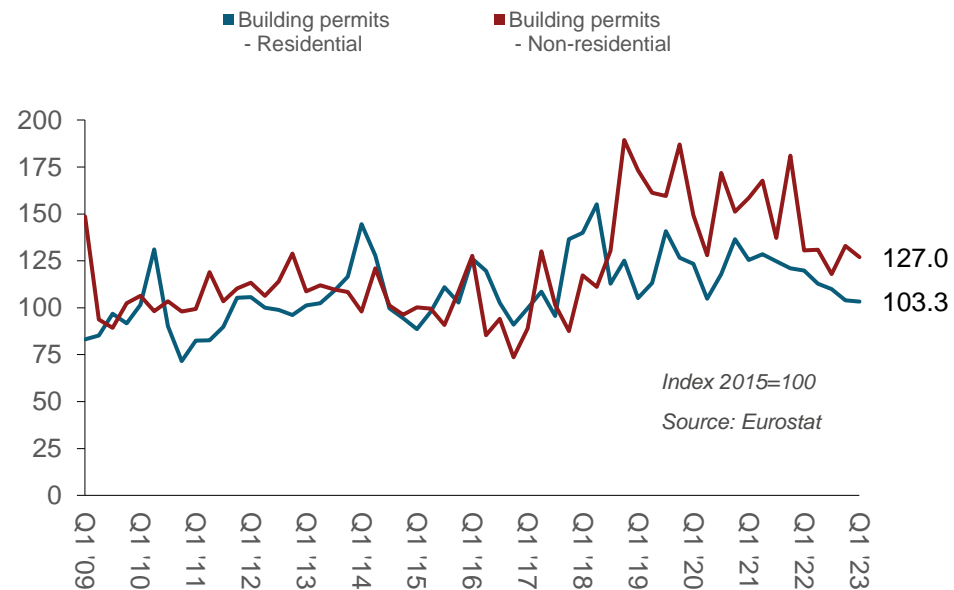


Expecting empty order book in 12 months



...conclusion

Development building permits

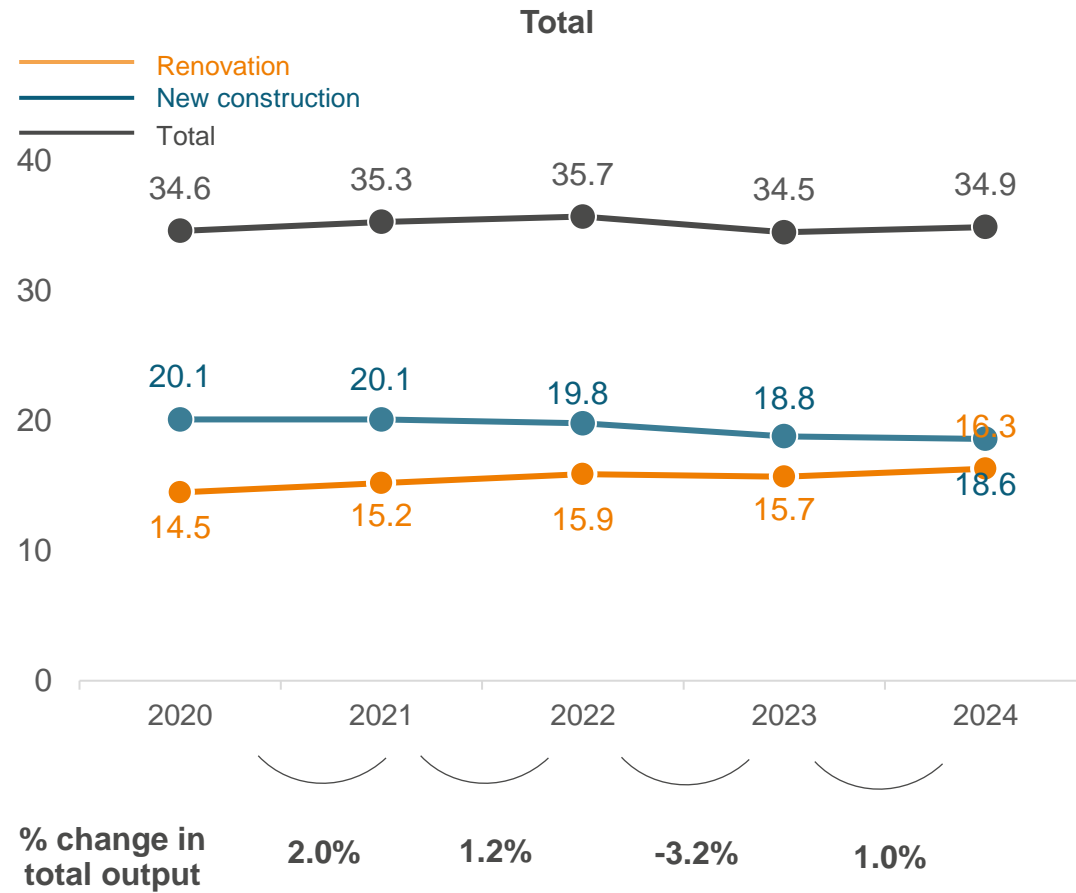


Economic and construction related indicators	Value Q2 2022	Value Q1 2023	Value Q2 2023	Q-2-Q development
GDP (quarterly growth rate) (%)*	0.2	0.4	0.2	Negative
Consumer confidence indicator**	-18.7	-14.5	-13.7	Positive
Industrial confidence indicator**	-4.2	-14.7	-17.7	Negative
Construction confidence indicator**	5.7	0.8	0.2	Negative
Production value buildings (index 2015=100)**	95.6	95.3	96.7	Positive
Architects with postponed projects (%)***	48	43	47	Negative
Architects with cancelled projects (%)***	31	36	32	Positive
Building permits residential (index 2015=100)**	115.2	104.8	103.3	Negative
Building permits non-residential (index 2015=100)**	131.9	133.3	127.0	Negative

Source: * Country statistical office; ** Eurostat, *** Arch-Vision

...conclusion

(% change year over year)



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Poland

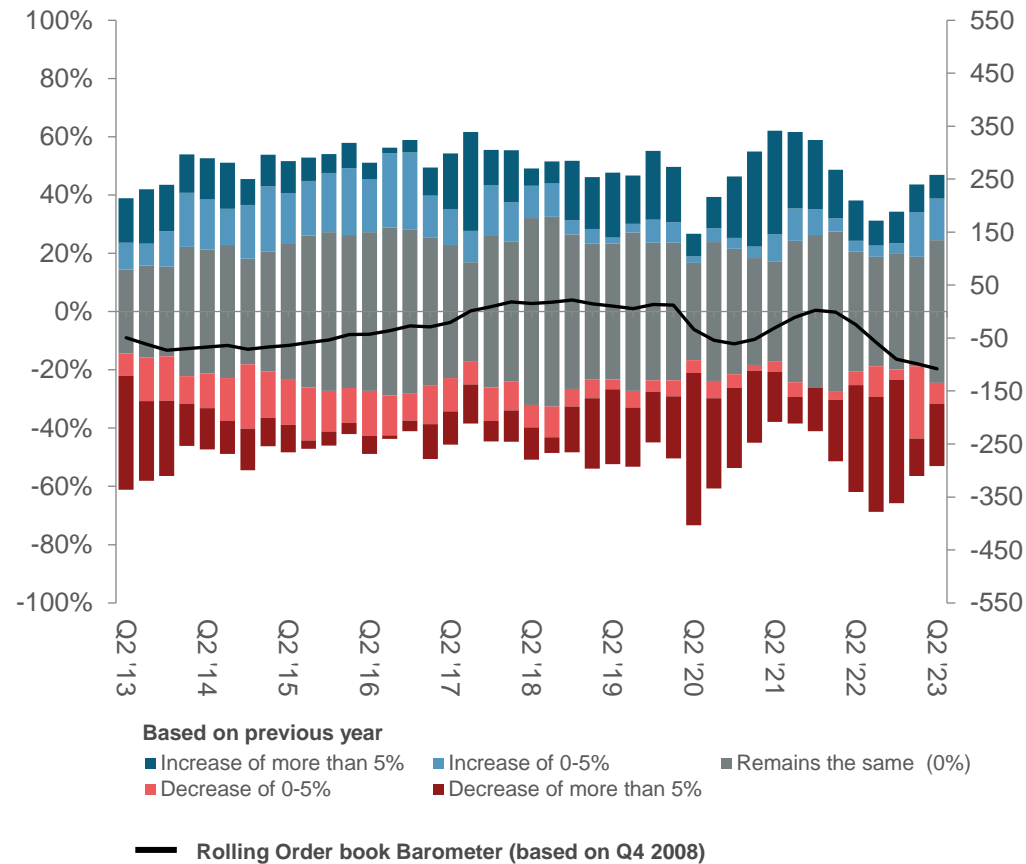
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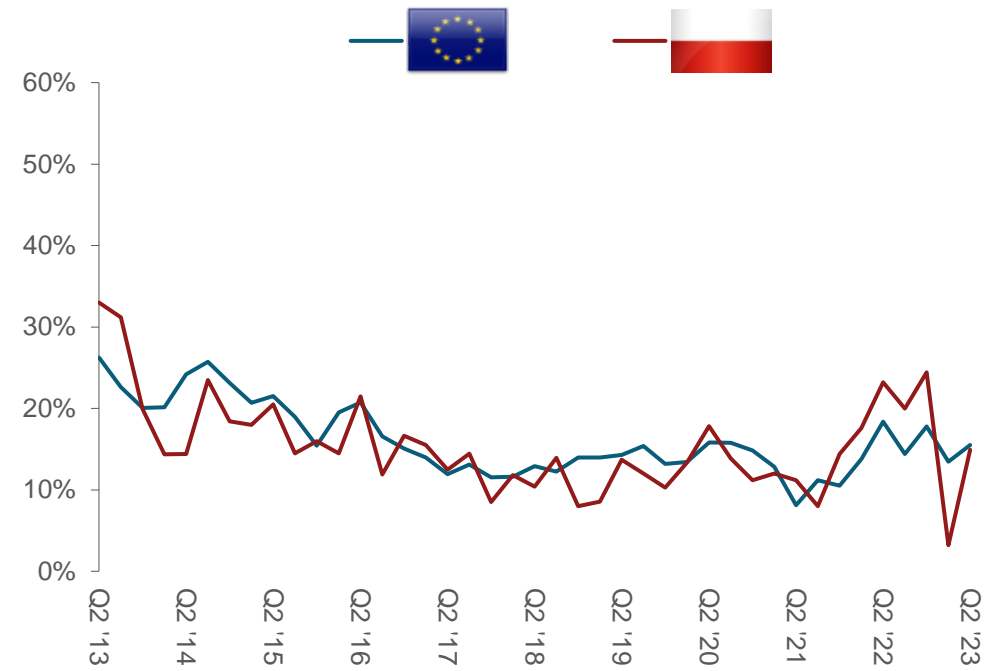


...conclusion

Development of order book

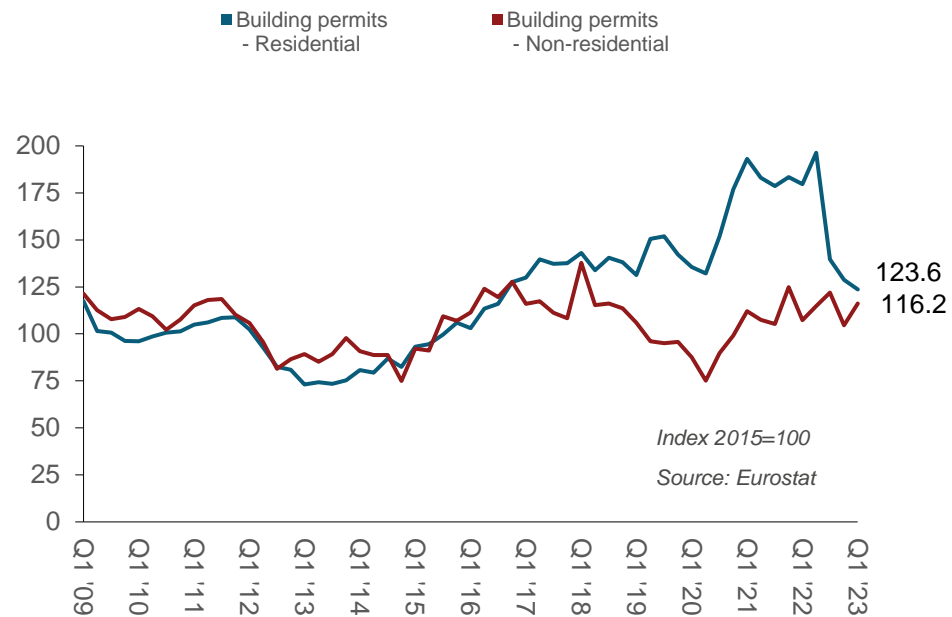


Expecting empty order book in 12 months



...conclusion

Development building permits

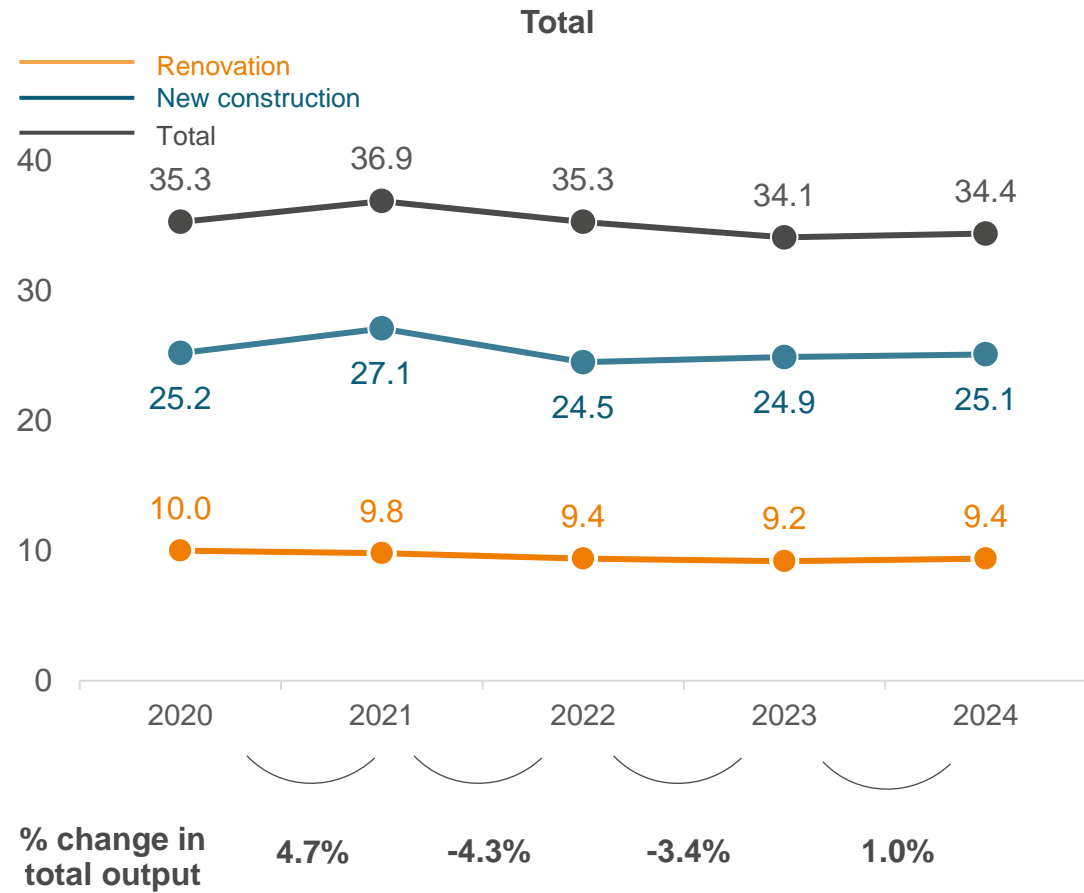


Economic and construction related indicators	Value Q2 2022	Value Q1 2023	Value Q2 2023	Q-2-Q development
GDP (quarterly growth rate) (%)*	-2.1	3.8	-3.7	Negative
Consumer confidence indicator**	-14.3	-16.0	-8.4	Positive
Industrial confidence indicator**	-16.0	-18.6	-20.4	Negative
Construction confidence indicator**	-20.5	-23.7	-22.4	Positive
Production value buildings (index 2015=100)**	127.5	121.2	123.7	Positive
Architects with postponed projects (%)***	25	44	29	Positive
Architects with cancelled projects (%)***	25	25	25	Equal
Building permits residential (index 2015=100)**	196.9	127.3	123.6	Negative
Building permits non-residential (index 2015=100)**	116.9	104.2	116.2	Positive

Source: * Country statistical office; ** Eurostat, *** Arch-Vision

...conclusion

(% change year over year)



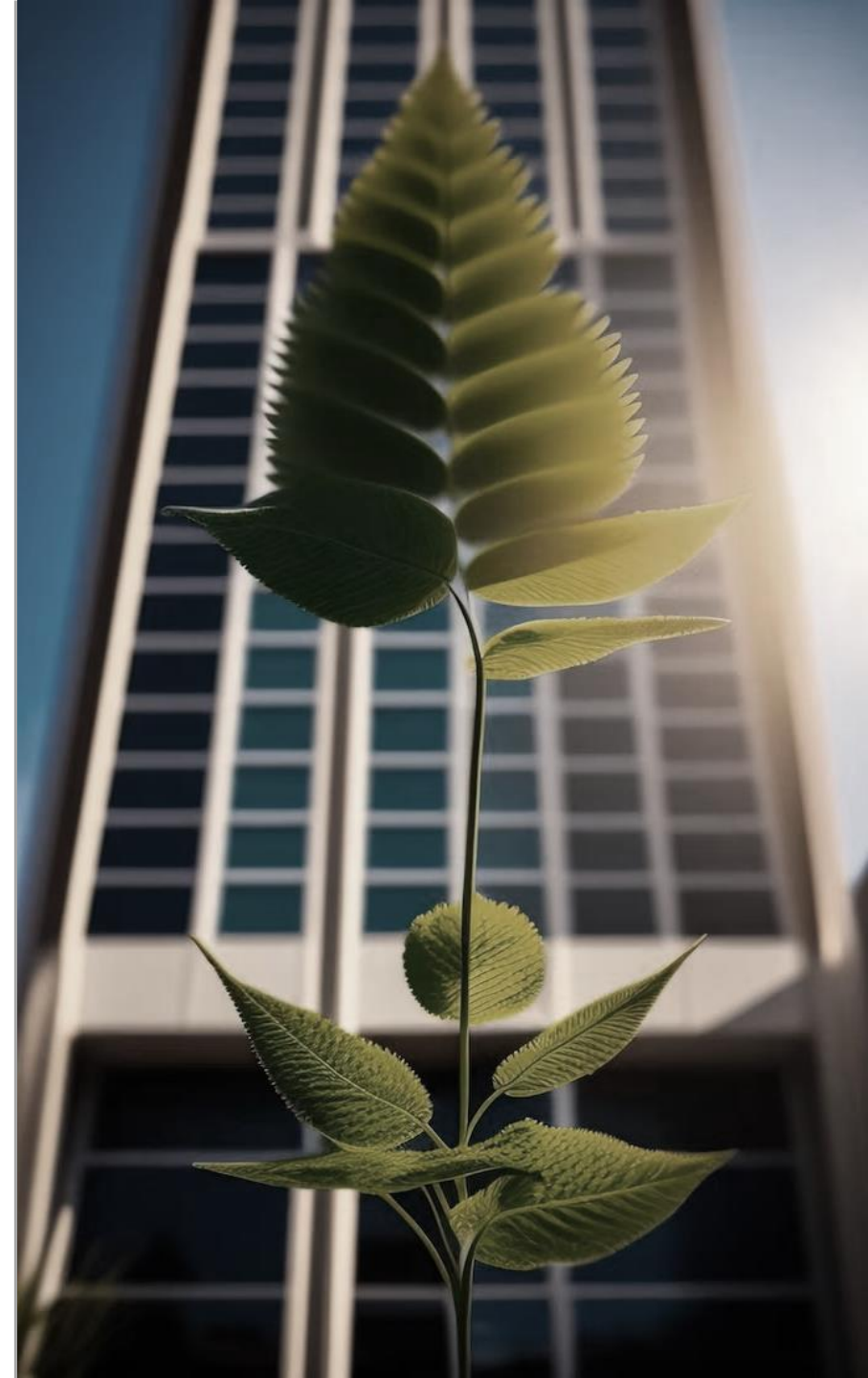
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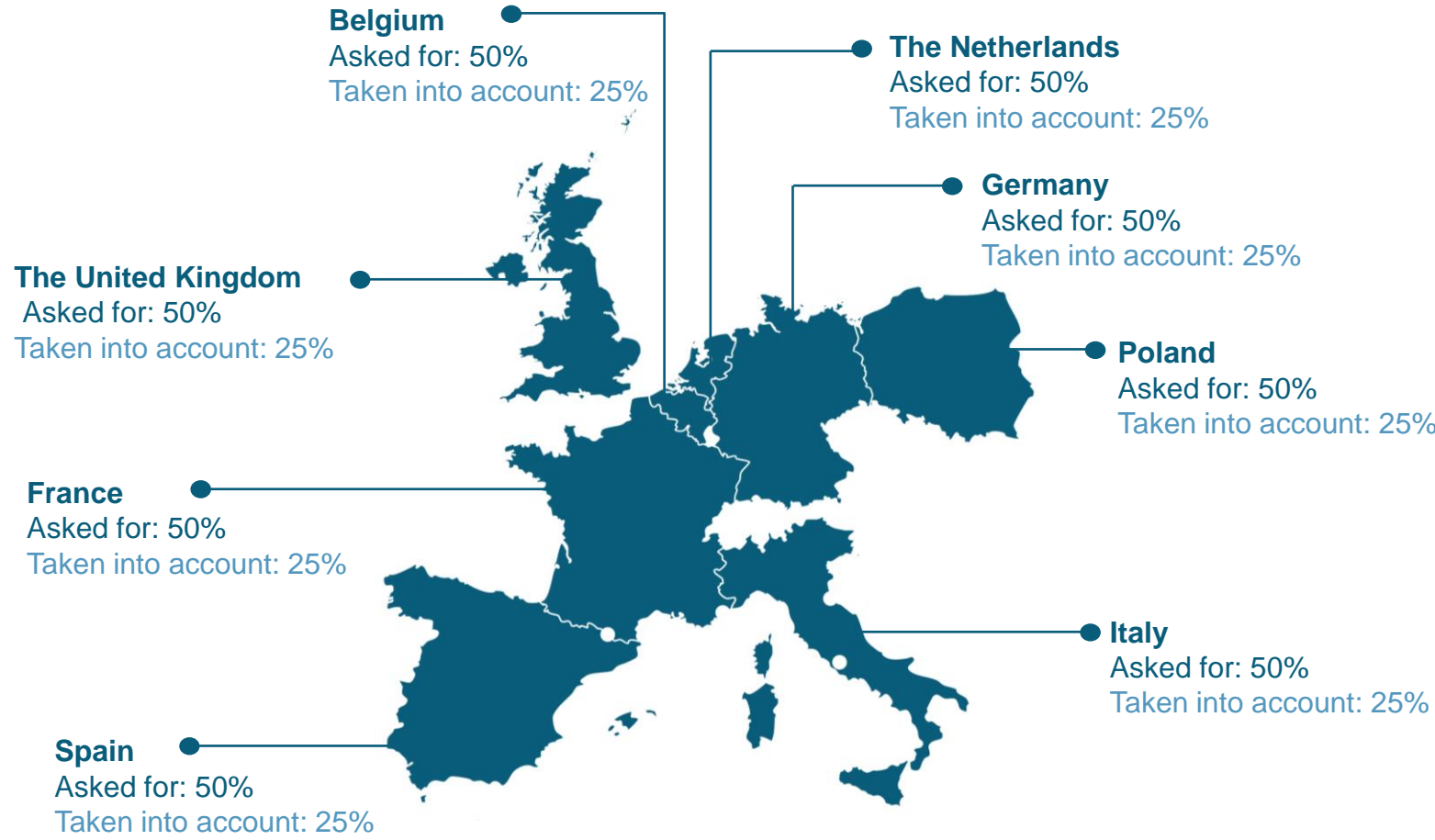


...conclusion

Sustainable/ circular construction

To what extent do your *clients* ask for sustainability...?

What would be approximately the share of your *projects* where sustainability is taken into account?

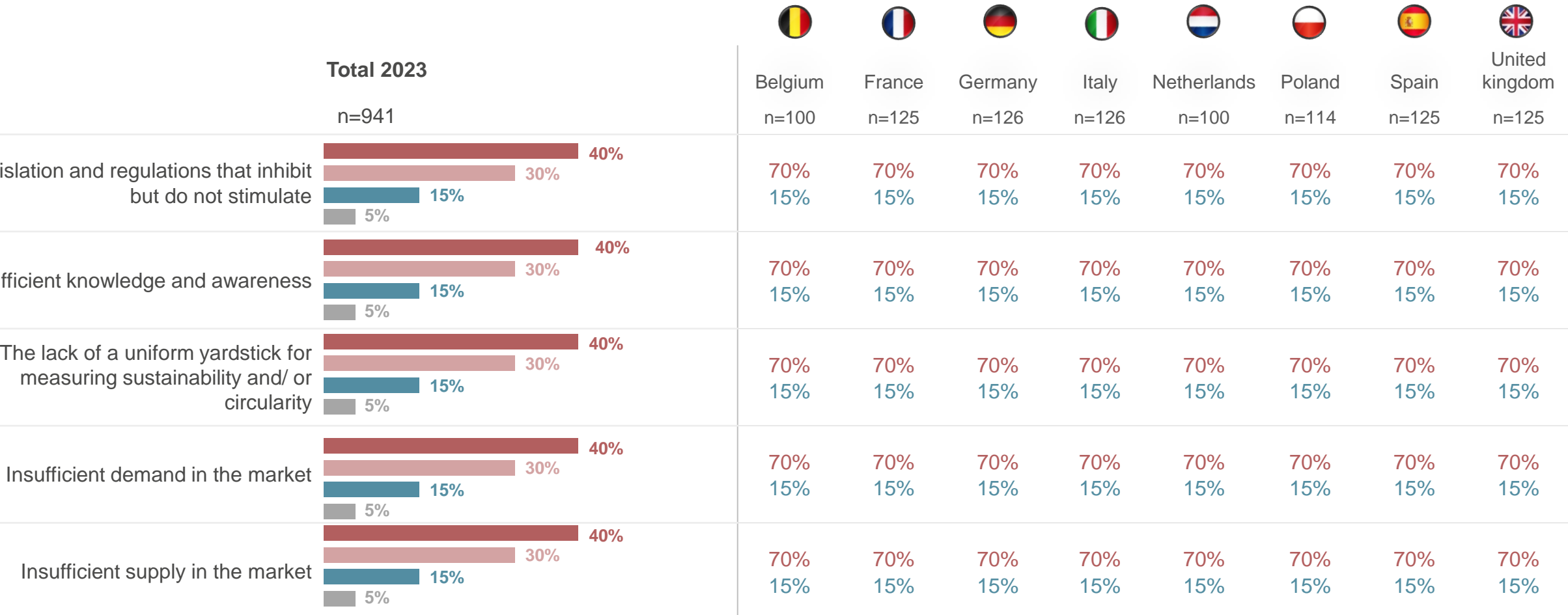


Country	Sustainability asked for 2022	Sustainability taken into account 2022
 Belgium	50%	25%
 Netherlands	50%	25%
 France	50%	25%
 Germany	50%	25%
 United Kingdom	50%	25%
 Spain	50%	25%
 Italy	50%	25%
 Poland	50%	25%

...conclusion

Obstacles for a sustainable and circular construction sector

To what extent do you see the following issues as a problem for the transition to a sustainable and circular construction sector?











Big problem, **Small problem**, **No problem**, **Don't know**

Problem (big + small), No problem

...conclusion

Driving forces























Which other stakeholders other than architects are influential when it comes to promoting sustainable construction? – Top 10

	Total 2023 n=941	Total 2022 n=xx	 Belgium n=100	 France n=125	 Germany n=126	 Italy n=126	 Netherlands n=100	 Poland n=114	 Spain n=125	 United Kingdom n=125
xx	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
xx	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%
xx	15%	25%	15%	15%	15%	15%	15%	15%	15%	15%
xx	10%	25%	10%	10%	10%	10%	10%	10%	10%	10%
xx	10%	*	10%	10%	10%	10%	10%	10%	10%	10%
xx	10%	25%	10%	10%	10%	10%	10%	10%	10%	10%
xx	10%	25%	10%	10%	10%	10%	10%	10%	10%	10%
xx	5%	*	5%	5%	5%	5%	5%	5%	5%	5%
xx	5%	25%	5%	5%	5%	5%	5%	5%	5%	5%
xx	5%	25%	5%	5%	5%	5%	5%	5%	5%	5%

*Data not available























...conclusion

Perception of sustainable construction
*What describes **sustainable construction** best according to you?*

		 Belgium	 France	 Germany	 Italy	 Netherlands	 Poland	 Spain	 United Kingdom
	Total Q2 2023	n=100	n=125	n=126	n=126	n=100	n=114	n=125	n=125
XX	 30%	30%	30%	30%	30%	30%	30%	30%	30%
XX	 25%	25%	25%	25%	25%	25%	25%	25%	25%
XX	 10%	10%	10%	10%	10%	10%	10%	10%	10%
XX	 10%	10%	10%	10%	10%	10%	10%	10%	10%
XX	 10%	10%	10%	10%	10%	10%	10%	10%	10%
XX	 10%	10%	10%	10%	10%	10%	10%	10%	10%
XX	 10%	10%	10%	10%	10%	10%	10%	10%	10%
XX	 10%	10%	10%	10%	10%	10%	10%	10%	10%
XX	 1%	1%	1%	1%	1%	1%	1%	1%	1%
XX	 1%	1%	1%	1%	1%	1%	1%	1%	1%
XX	 1%	1%	1%	1%	1%	1%	1%	1%	1%
XX	 1%	1%	1%	1%	1%	1%	1%	1%	1%
Other	 3%	3%	3%	3%	3%	3%	3%	3%	3%
Don't know/no opinion	 2%	2%	2%	2%	2%	2%	2%	2%	2%

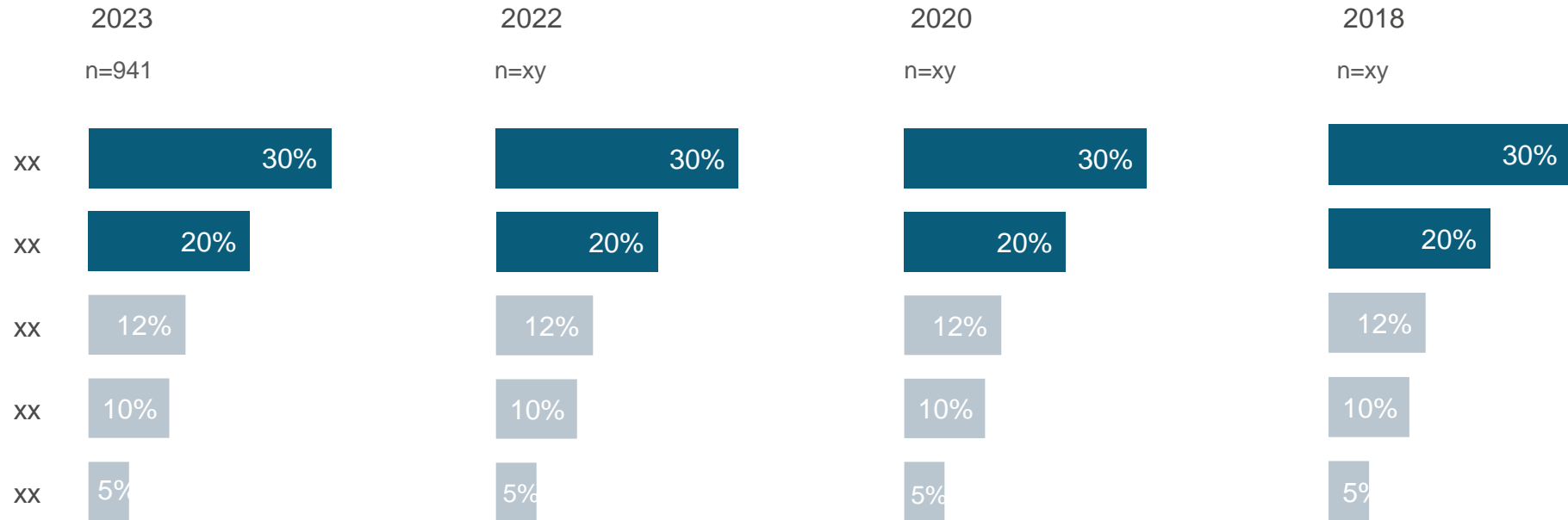
...conclusion

Perception of circular construction
*What describes **circular construction** best according to you?*

								
	Belgium	France	Germany	Italy	Netherlands	Poland	Spain	United Kingdom
Total Q2 2023	n=100	n=125	n=126	n=126	n=100	n=114	n=125	n=125
XX  30%	30%	30%	30%	30%	30%	30%	30%	30%
XX  25%	25%	25%	25%	25%	25%	25%	25%	25%
XX  10%	10%	10%	10%	10%	10%	10%	10%	10%
XX  10%	10%	10%	10%	10%	10%	10%	10%	10%
XX  10%	10%	10%	10%	10%	10%	10%	10%	10%
XX  10%	10%	10%	10%	10%	10%	10%	10%	10%
XX  10%	10%	10%	10%	10%	10%	10%	10%	10%
XX  10%	10%	10%	10%	10%	10%	10%	10%	10%
XX  1%	1%	1%	1%	1%	1%	1%	1%	1%
XX  1%	1%	1%	1%	1%	1%	1%	1%	1%
XX  1%	1%	1%	1%	1%	1%	1%	1%	1%
XX  1%	1%	1%	1%	1%	1%	1%	1%	1%
Other  3%	3%	3%	3%	3%	3%	3%	3%	3%
Don't know/no opinion  2%	2%	2%	2%	2%	2%	2%	2%	2%

...conclusion

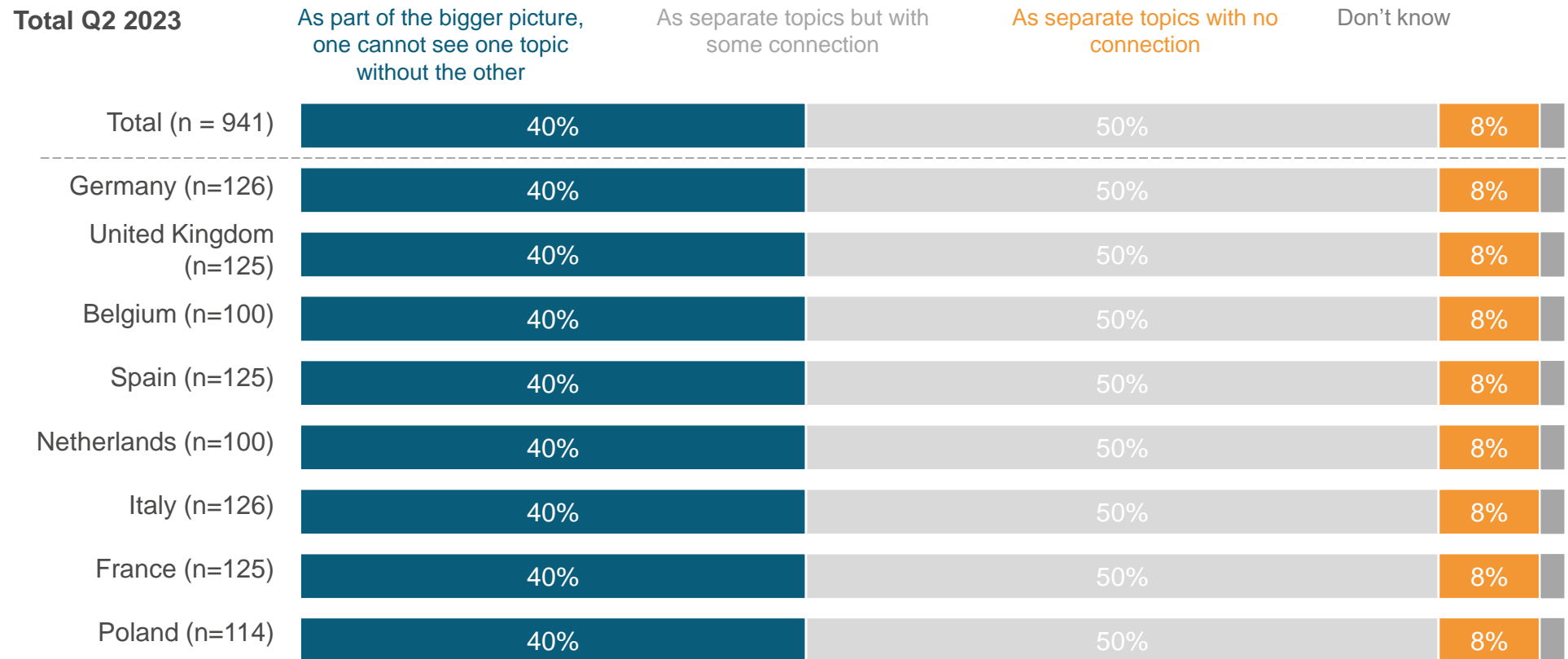
Perception of circular construction
*What describes **circular construction** best according to you?*



...conclusion

Holistic view on sustainability

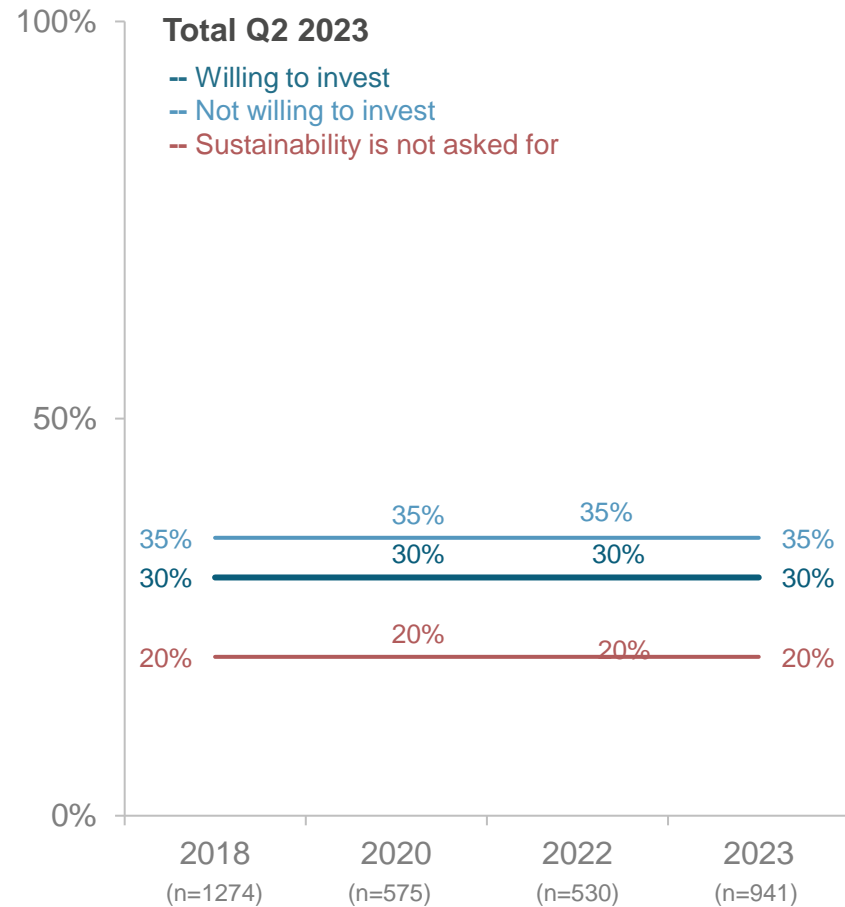
How does your organization see the connection between circular construction, CO2 reduction, energy efficiency and sustainability?



...conclusion

Willingness to invest in **sustainability**

To what extent do your clients ask for sustainability and are they willing to invest more in it?



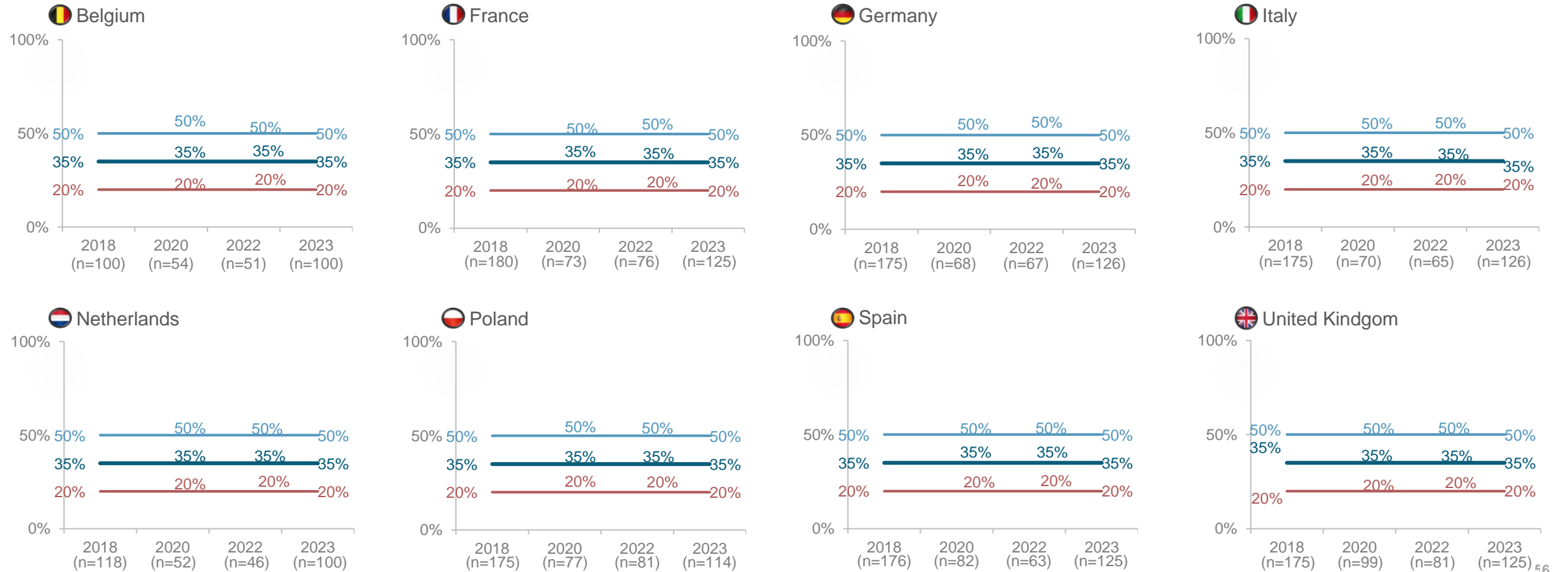
	Willing to invest	Not willing to invest	Sustainability is not asked for	Don't know	willing to invest % more (investors)	willing to invest % more (all)
Total (n=xx)	30%	35%	30%		30,5	15,5
Netherlands (n=100)	30%	35%	30%		30,5	15,5
United Kingdom (n=125)	30%	35%	30%		30,5	15,5
Spain (n=125)	30%	35%	30%		30,5	15,5
Belgium (n=100)	30%	35%	30%		30,5	15,5
Germany (n=126)	30%	35%	30%		30,5	15,5
Italy (n=126)	30%	35%	30%		30,5	15,5
Poland (n=114)	30%	35%	30%		30,5	15,5
France (n=125)	30%	35%	30%		30,5	15,5

...conclusion

Willingness to invest in **sustainability**

To what extent do your clients ask for sustainability and are they willing to invest more in it?

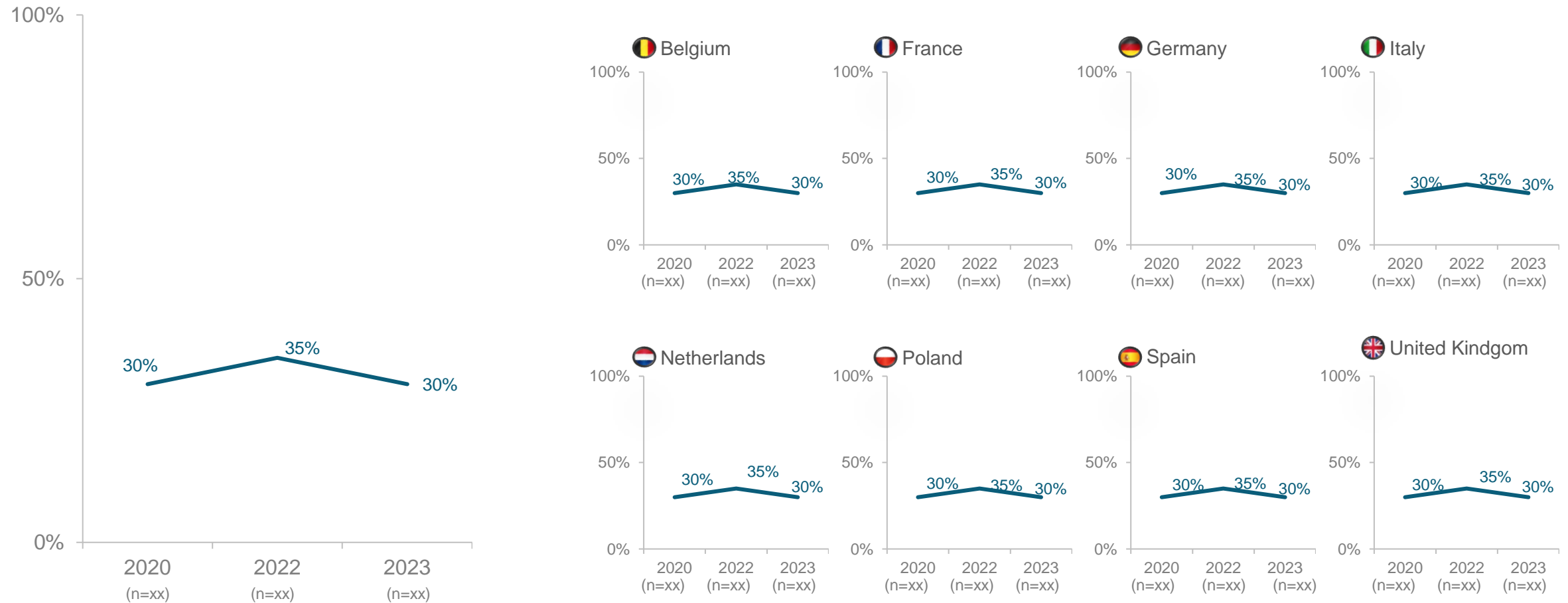
- Willing to invest
- Not willing to invest
- Sustainability is not asked for



...conclusion

Share of projects where sustainability is taken into account









What would be approximately the share of your projects where sustainability is taken into account?



...conclusion

Creating sustainable building project





















What actions do you take as a company to create a sustainable building project? – Top 10

	Total 2023 n=xx	 Belgium n=xx	 France n=xx	 Germany n=xx	 Italy n=xx	 Netherlands n=xx	 Poland n=xx	 Spain n=xx	 United Kingdom n=xx
xx	25%	25%	25%	25%	25%	25%	25%	25%	25%
xx	25%	25%	25%	25%	25%	25%	25%	25%	25%
xx	15%	15%	15%	15%	15%	15%	15%	15%	15%
xx	10%	10%	10%	10%	10%	10%	10%	10%	10%
xx	10%	10%	10%	10%	10%	10%	10%	10%	10%
xx	10%	10%	10%	10%	10%	10%	10%	10%	10%
xx	10%	10%	10%	10%	10%	10%	10%	10%	10%
xx	5%	5%	5%	5%	5%	5%	5%	5%	5%
xx	5%	5%	5%	5%	5%	5%	5%	5%	5%
xx	5%	5%	5%	5%	5%	5%	5%	5%	5%
xx	5%	5%	5%	5%	5%	5%	5%	5%	5%

...conclusion

Certifications

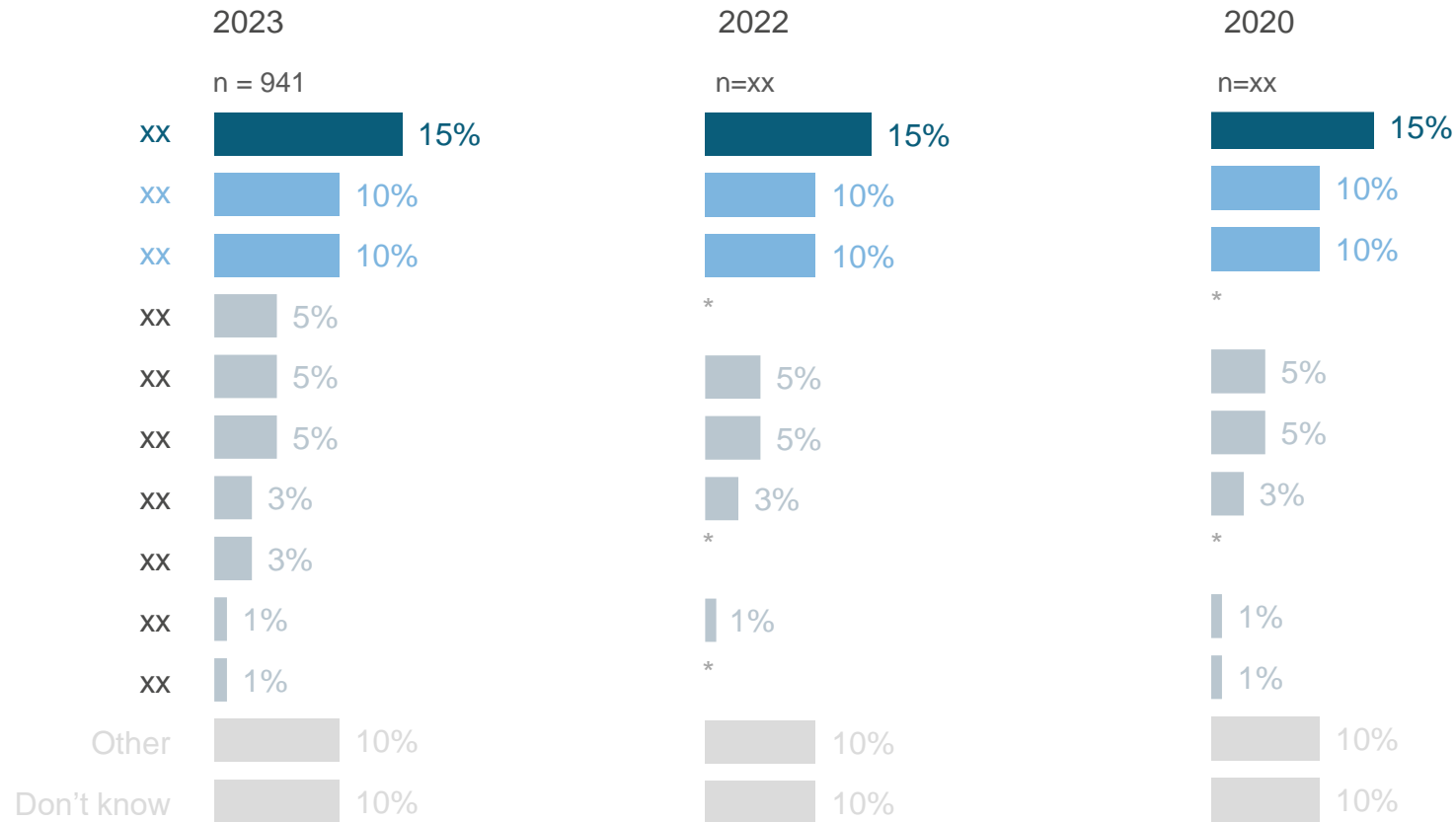
Which sustainability certifications are most important in the construction industry?

Total 2023									
n=941		Belgium n=100	France n=125	Germany n=126	Italy n=126	Netherlands n=100	Poland n=114	Spain n=125	United kingdom n=125
xx	 15%	15%	15%	15%	15%	15%	15%	15%	15%
xx	 10%	10%	10%	10%	10%	10%	10%	10%	10%
xx	 10%	10%	10%	10%	10%	10%	10%	10%	10%
xx	 5%	5%	5%	5%	5%	5%	5%	5%	5%
xx	 5%	5%	5%	5%	5%	5%	5%	5%	5%
xx	 5%	5%	5%	5%	5%	5%	5%	5%	5%
xx	 3%	3%	3%	3%	3%	3%	3%	3%	3%
xx	 3%	3%	3%	3%	3%	3%	3%	3%	3%
xx	 1%	1%	1%	1%	1%	1%	1%	1%	1%
xx	 1%	1%	1%	1%	1%	1%	1%	1%	1%
Other	 10%	10%	10%	10%	10%	10%	10%	10%	10%
Don't know	 10%	10%	10%	10%	10%	10%	10%	10%	10%

...conclusion

Certifications

Which sustainability certifications are most important in the construction industry?



...comment on certificates...

*Data not available

...conclusion

Certifications

Which sustainability certifications are most important in the construction industry?

Total 2023

n=941



Belgium
n=100



France
n=125



Germany
n=126



Italy
n=126



Netherlands
n=100



Poland
n=114



Spain
n=125



United
kingdom
n=125

xx 15%

15% 15% 15% 15% 15% 15% 15% 15%

xx 10%

10% 10% 10% 10% 10% 10% 10% 10%

xx 10%

10% 10% 10% 10% 10% 10% 10% 10%

xx 5%

5% 5% 5% 5% 5% 5% 5% 5%

xx 5%

5% 5% 5% 5% 5% 5% 5% 5%

xx 5%

5% 5% 5% 5% 5% 5% 5% 5%

xx 3%

5% 5% 5% 5% 5% 5% 5% 5%

xx 3%

5% 5% 5% 5% 5% 5% 5% 5%

xx 1%

5% 5% 5% 5% 5% 5% 5% 5%

xx 1%

5% 5% 5% 5% 5% 5% 5% 5%

xx 10%

10% 10% 10% 10% 10% 10% 10% 10%

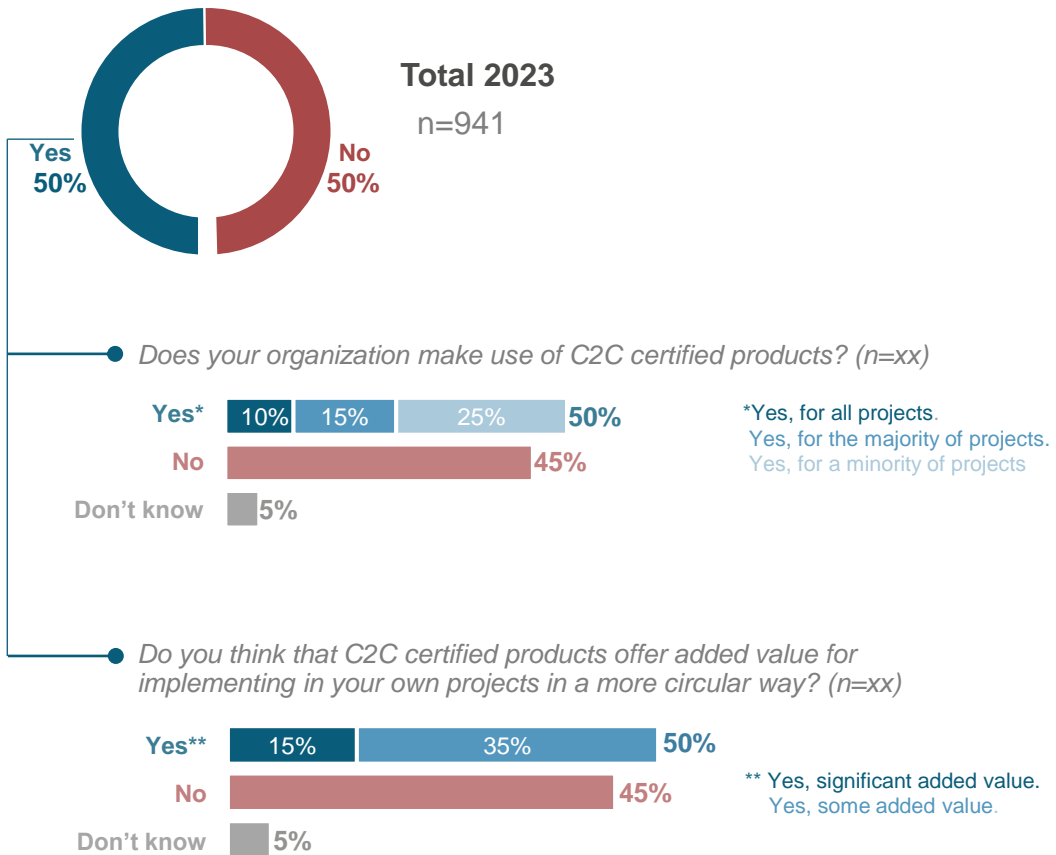
xx 10%

10% 10% 10% 10% 10% 10% 10% 10%

...conclusion

C2C certified products (C2C = Cradle to Cradle)

Are you familiar with the term C2C certified products (C2C = Cradle to Cradle)?

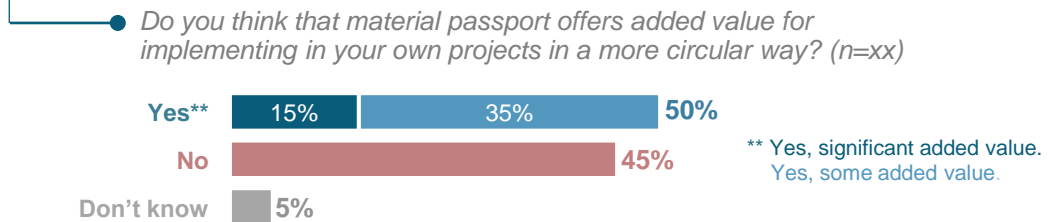
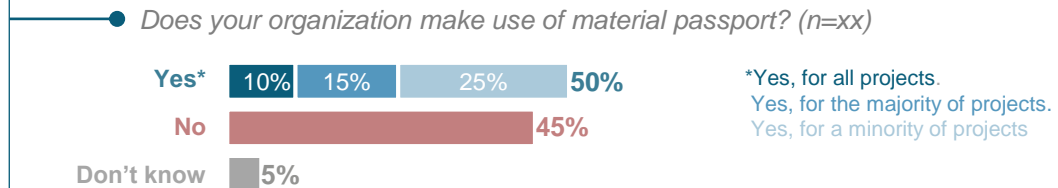
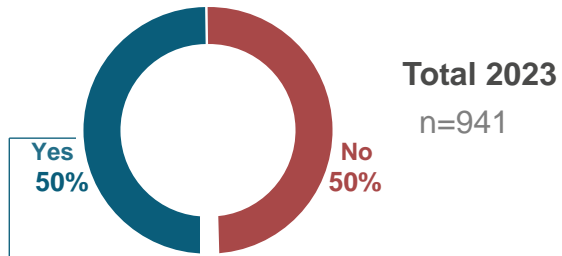


	Belgium	France	Germany	Italy	Netherlands	Poland	Spain	United kingdom
	n=100	n=125	n=126	n=126	n=100	n=114	n=125	n=125
	50%	50%	50%	50%	50%	50%	50%	50%
	n=xx	n=xx	n=xx	n=xx	n=xx	n=xx	n=xx	n=xx
	50%	50%	50%	50%	50%	50%	50%	50%
	45%	45%	45%	45%	45%	45%	45%	45%
	50%	50%	50%	50%	50%	50%	50%	50%
	45%	45%	45%	45%	45%	45%	45%	45%

...conclusion

Material passport

Are you familiar with the term material passport?

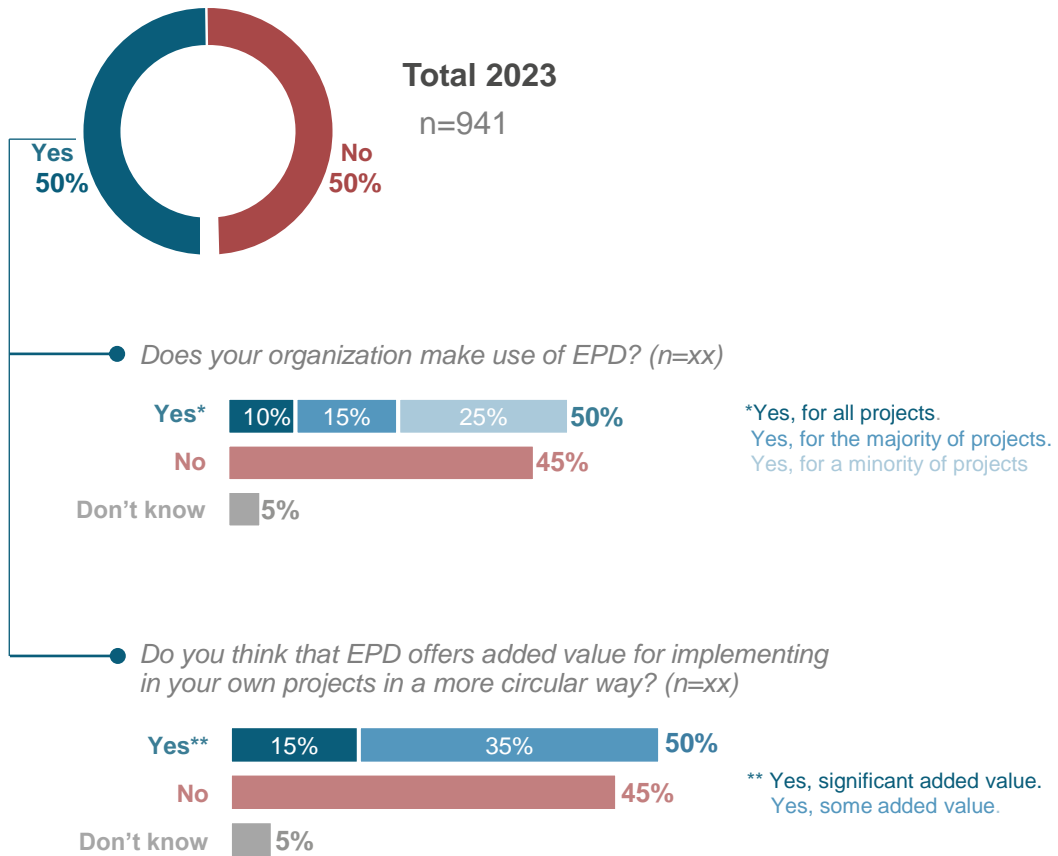


	Belgium	France	Germany	Italy	Netherlands	Poland	Spain	United kingdom
	n=100	n=125	n=126	n=126	n=100	n=114	n=125	n=125
	50%	50%	50%	50%	50%	50%	50%	50%
	n=xx	n=xx	n=xx	n=xx	n=xx	n=xx	n=xx	n=xx
	50%	50%	50%	50%	50%	50%	50%	50%
	45%	45%	45%	45%	45%	45%	45%	45%
	50%	50%	50%	50%	50%	50%	50%	50%
	45%	45%	45%	45%	45%	45%	45%	45%

...conclusion

EPD (Environmental Product Declaration)

Are you familiar with the term EPD (Environmental Product Declaration)?

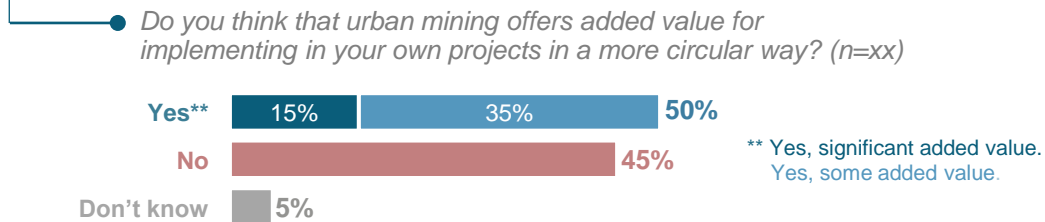
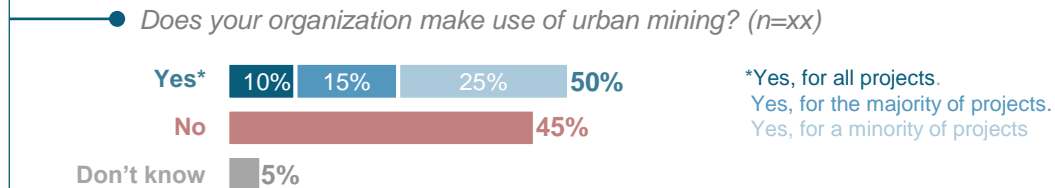
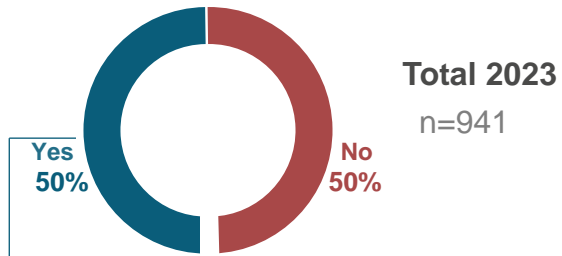


	Belgium	France	Germany	Italy	Netherlands	Poland	Spain	United kingdom
	n=100	n=125	n=126	n=126	n=100	n=114	n=125	n=125
	50%	50%	50%	50%	50%	50%	50%	50%
	n=xx	n=xx	n=xx	n=xx	n=xx	n=xx	n=xx	n=xx
	50%	50%	50%	50%	50%	50%	50%	50%
	45%	45%	45%	45%	45%	45%	45%	45%
	50%	50%	50%	50%	50%	50%	50%	50%
	45%	45%	45%	45%	45%	45%	45%	45%

...conclusion

Urban mining

Are you familiar with the term urban mining?











	Belgium	France	Germany	Italy	Netherlands	Poland	Spain	United kingdom
	n=100	n=125	n=126	n=126	n=100	n=114	n=125	n=125
	50%	50%	50%	50%	50%	50%	50%	50%
	n=xx	n=xx	n=xx	n=xx	n=xx	n=xx	n=xx	n=xx
	50%	50%	50%	50%	50%	50%	50%	50%
	45%	45%	45%	45%	45%	45%	45%	45%
	50%	50%	50%	50%	50%	50%	50%	50%
	45%	45%	45%	45%	45%	45%	45%	45%

...conclusion

Innovative product solutions









What are innovative product solutions with regard to sustainable and circular construction that are already being used? – Top 10

	Total 2023 n=358	 Belgium n=42	 France n=43	 Germany n=48	 Italy n=48	 Netherlands n=41	 Poland n=36	 Spain n=52	 United Kingdom n=48
xx	20%	20%	20%	20%	20%	20%	20%	20%	20%
xx	15%	15%	15%	15%	15%	15%	15%	15%	15%
xx	15%	15%	15%	15%	15%	15%	15%	15%	15%
xx	10%	10%	10%	10%	10%	10%	10%	10%	10%
xx	10%	10%	10%	10%	10%	10%	10%	10%	10%
xx	10%	10%	10%	10%	10%	10%	10%	10%	10%
xx	10%	10%	10%	10%	10%	10%	10%	10%	10%
xx	5%	5%	5%	5%	5%	5%	5%	5%	5%
xx	5%	5%	5%	5%	5%	5%	5%	5%	5%
xx	5%	5%	5%	5%	5%	5%	5%	5%	5%

...conclusion

Building components contributing to a sustainable building









Which building components do you think contribute the most to create a sustainable building? – Top 10

	Total 2023 n=941	 Belgium n=100	 France n=125	 Germany n=126	 Italy n=126	 Netherlands n=100	 Poland n=114	 Spain n=125	 United Kingdom n=125
xx	20%	20%	20%	20%	20%	20%	20%	20%	20%
xx	15%	15%	15%	15%	15%	15%	15%	15%	15%
xx	15%	15%	15%	15%	15%	15%	15%	15%	15%
xx	10%	10%	10%	10%	10%	10%	10%	10%	10%
xx	10%	10%	10%	10%	10%	10%	10%	10%	10%
xx	10%	10%	10%	10%	10%	10%	10%	10%	10%
xx	10%	10%	10%	10%	10%	10%	10%	10%	10%
xx	5%	5%	5%	5%	5%	5%	5%	5%	5%
xx	5%	5%	5%	5%	5%	5%	5%	5%	5%
xx	5%	5%	5%	5%	5%	5%	5%	5%	5%

...conclusion

Manufacturers' contribution to sustainable and circular construction

How can manufacturers of building and installation materials contribute to create a more sustainable and circular construction sector, both generic and at construction site specifically? – Top 10

	Total 2023 n=351	 Belgium n=41	 France n=42	 Germany n=46	 Italy n=48	 Netherlands n=40	 Poland n=38	 Spain n=49	 United Kingdom n=47
xx	20%	20%	20%	20%	20%	20%	20%	20%	20%
xx	15%	15%	15%	15%	15%	15%	15%	15%	15%
xx	15%	15%	15%	15%	15%	15%	15%	15%	15%
xx	10%	10%	10%	10%	10%	10%	10%	10%	10%
xx	10%	10%	10%	10%	10%	10%	10%	10%	10%
xx	10%	10%	10%	10%	10%	10%	10%	10%	10%
xx	10%	10%	10%	10%	10%	10%	10%	10%	10%
xx	5%	5%	5%	5%	5%	5%	5%	5%	5%
xx	5%	5%	5%	5%	5%	5%	5%	5%	5%
xx	5%	5%	5%	5%	5%	5%	5%	5%	5%

Index

Key insights and recommendations

Economic developments

Sustainability

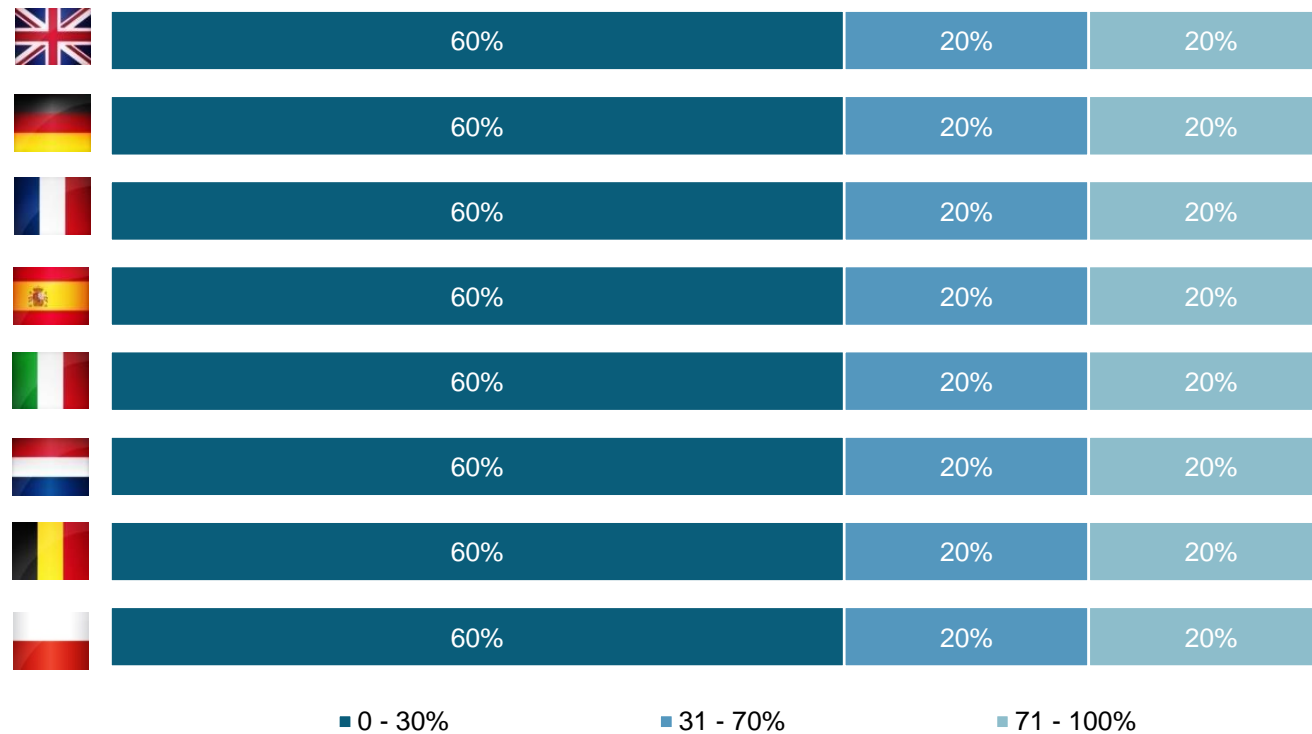
Appendix



Background of the architects

...conclusion

New development or renovation



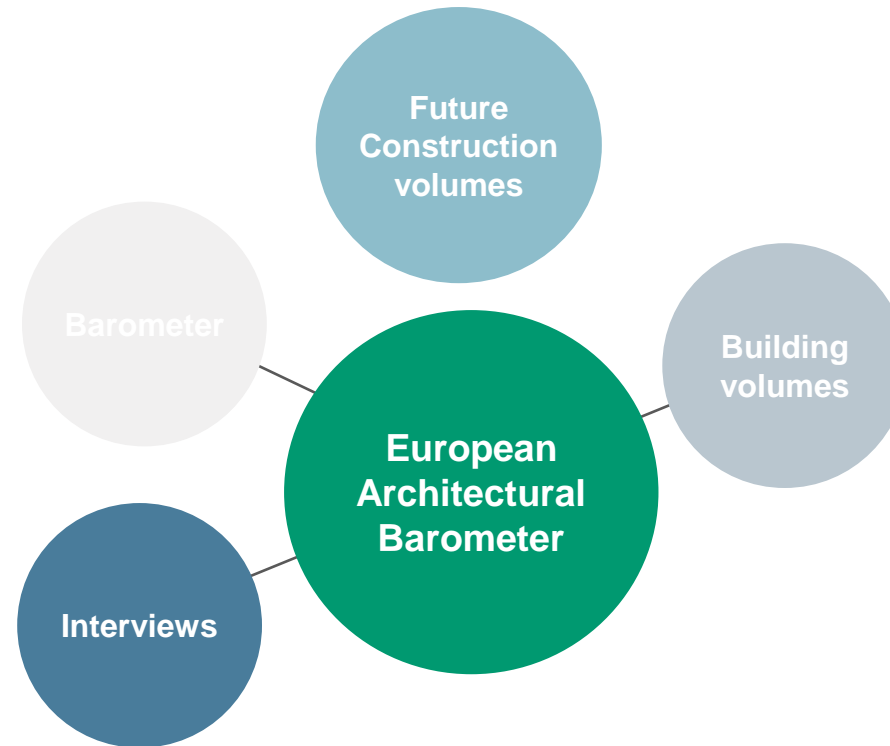
About European Architectural Barometer

European Architectural Barometer

Architects have already been monitored by several institutes in quite diverging ways in the different countries. USP launched this European Architectural Barometer for a more cohesive view. The European Architectural Barometer is extremely useful for organisations with a focus on Europe that also want to compare the activities of architects in different countries.

Interviews

All interviews are conducted by native speakers. From the third measurement onwards, two hundred interviews per country have been completed per measurement. The first two measurements were based on one hundred interviews per country. Later, for the Netherlands and Belgium, the measurements returned to one hundred interviews.



Future construction volumes

For decision makers charged with considerations of company resources, staffing and marketing strategy, a clear insight into future construction volumes is essential. However, economic indicators seldom provide an adequate picture of these volumes.

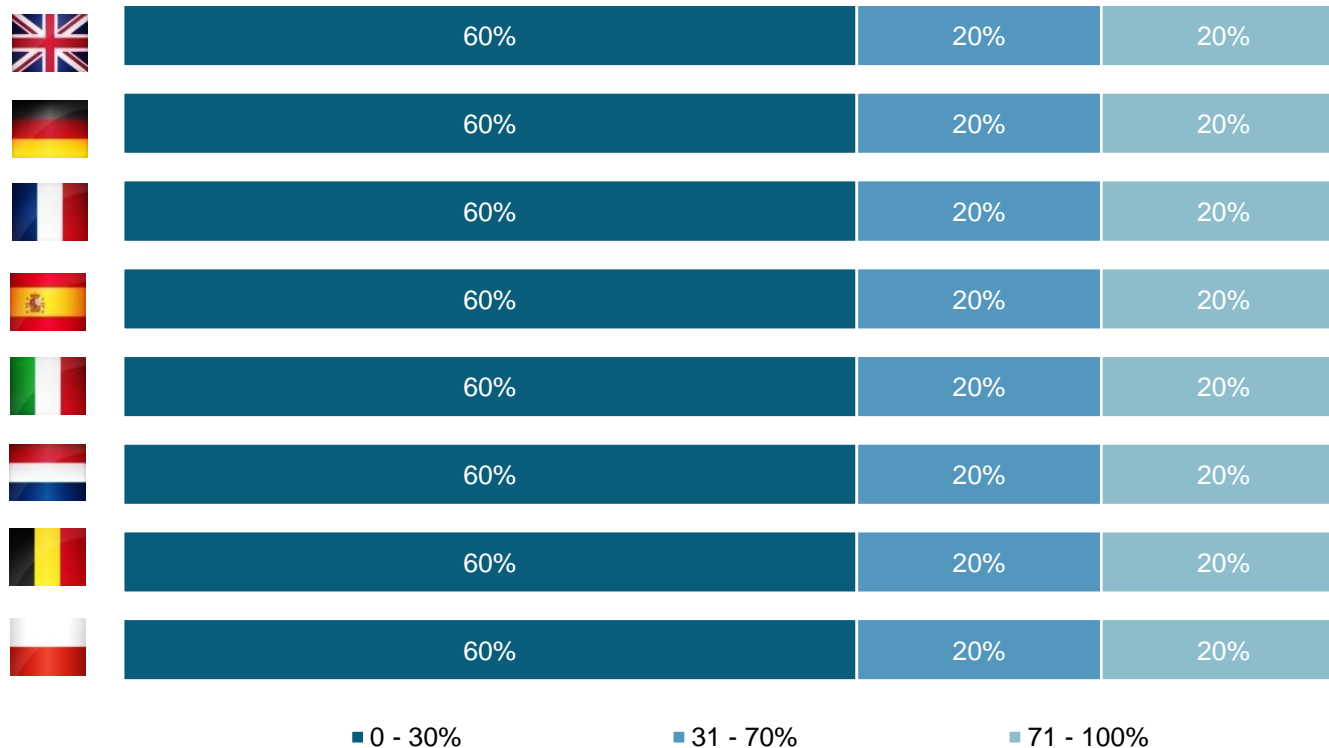
Building volumes

The construction industry operates in a delayed cyclical market, which means that buildings designed today will not be ready until at least two years from now. The economic activities of architectural firms provide a strong indication of the direction in which the construction sector will develop in terms of both building volumes and the way in which building volumes will be realised.

Results per segment

For three key questions from the current measurement of the European Architectural Barometer, the results are divided by architects that realise most of their sales in the residential segment (0% – 30% non-residential), by architects that realise sales in both segments (31% - 70% non-residential), and by architects that realise most of their sales in the non-residential segment (71% - 100% non-residential).

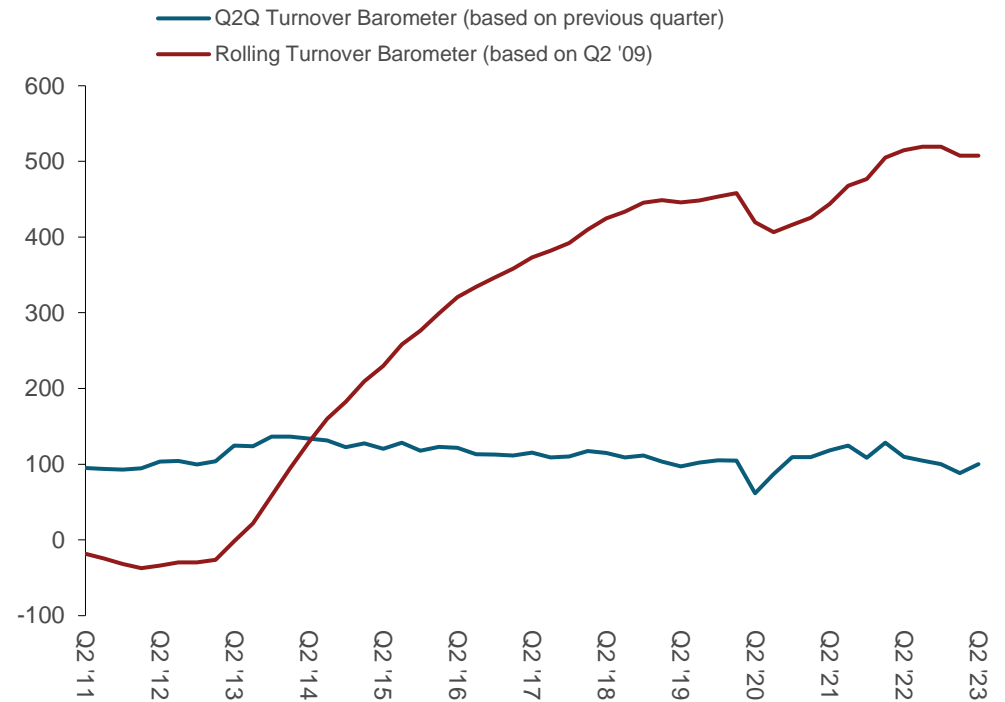
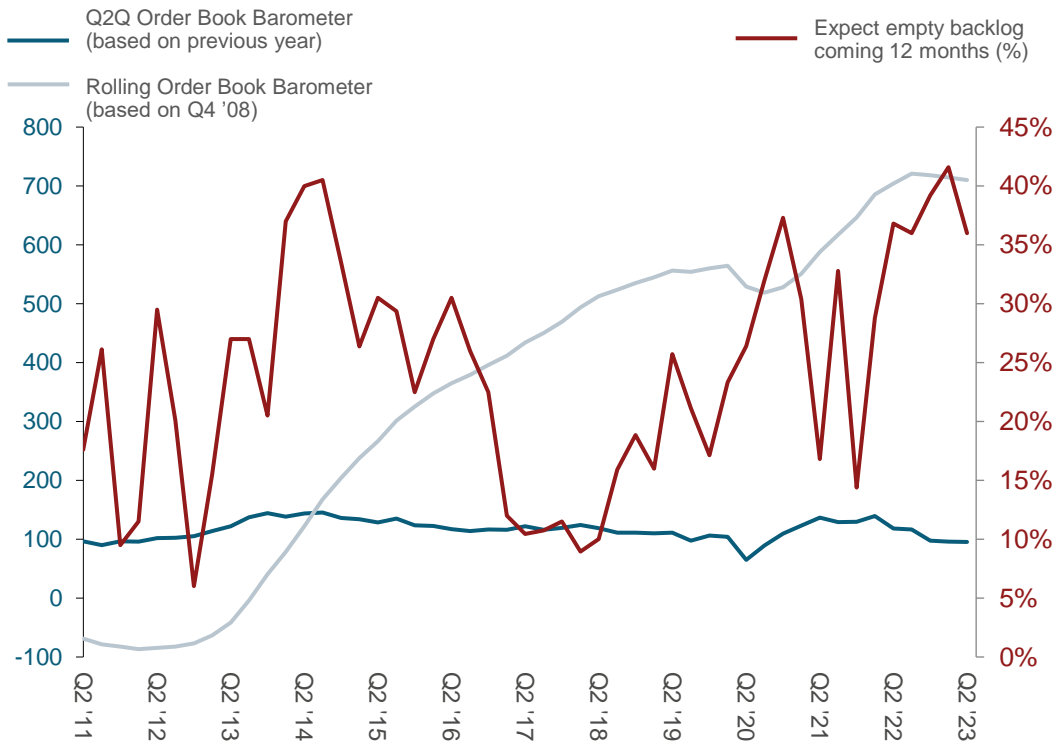
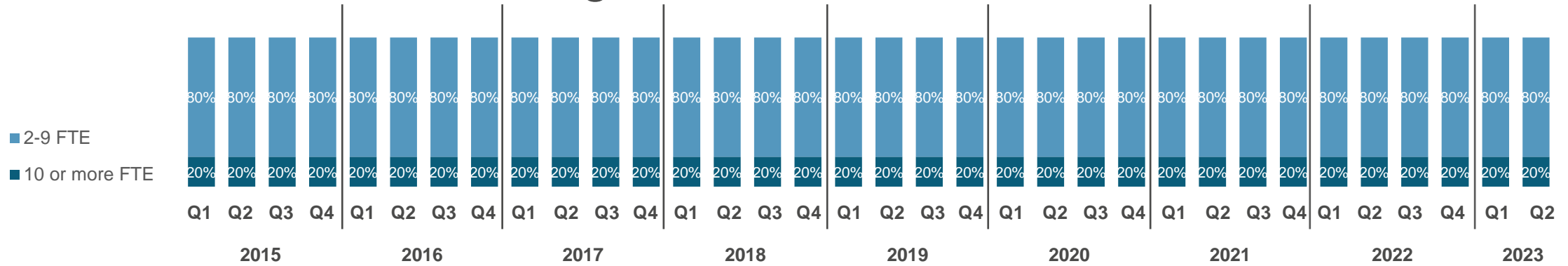
Segment most active



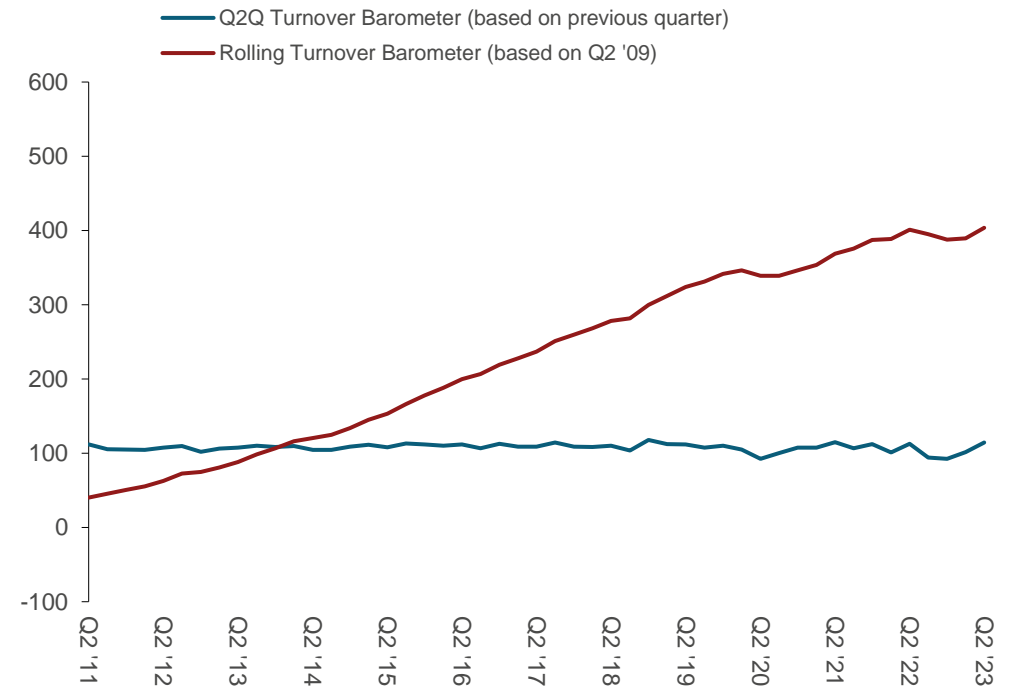
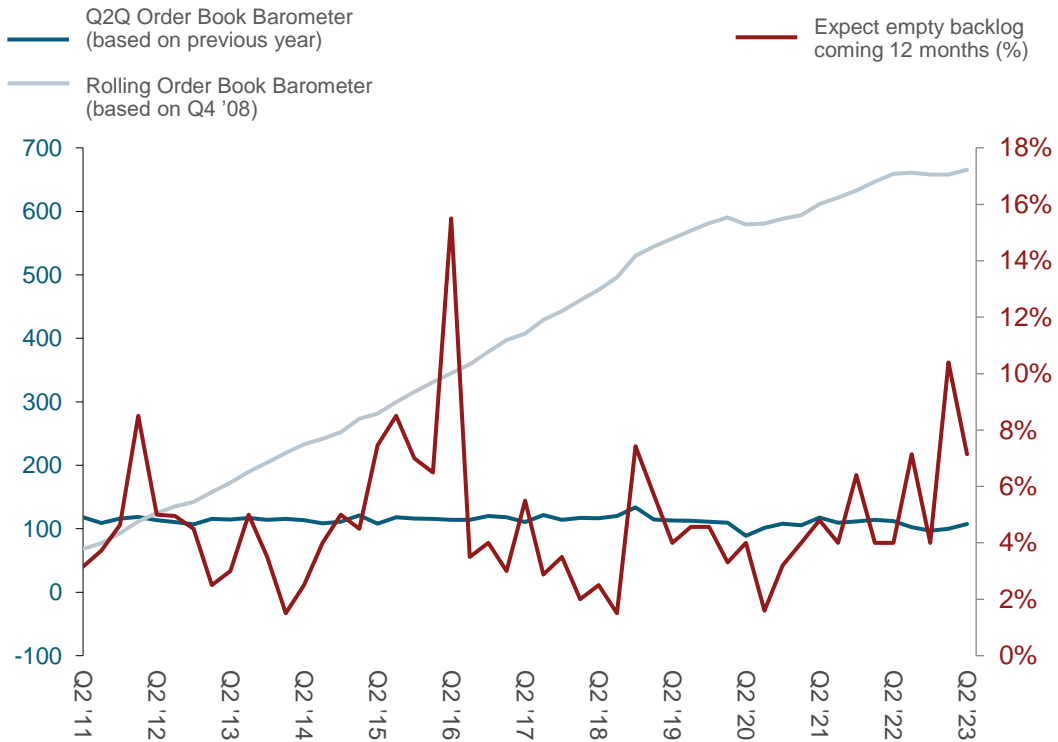
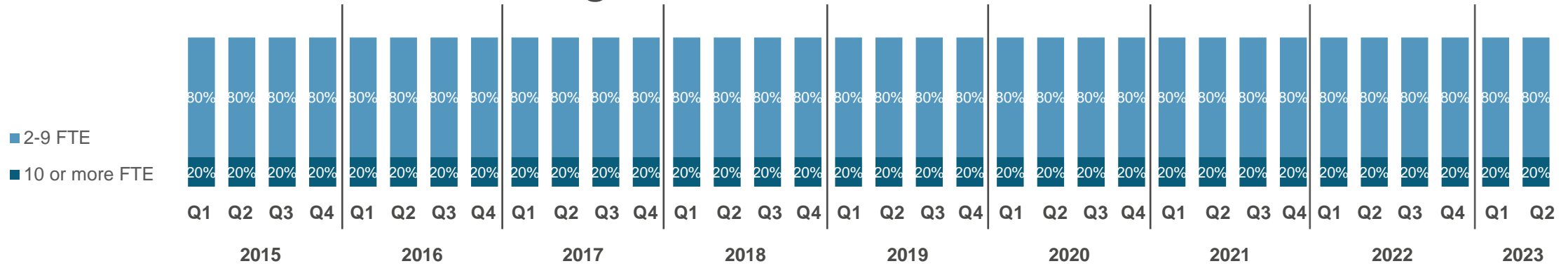
The tables on the following pages show the abovementioned split with regard to the following questions:

- **How did the turnover develop in this quarter compared to the previous quarter?**
- **How did your order book develop in this quarter compared to the same quarter last year?**
- **Do you expect that your order book might be empty these coming 12 months?**

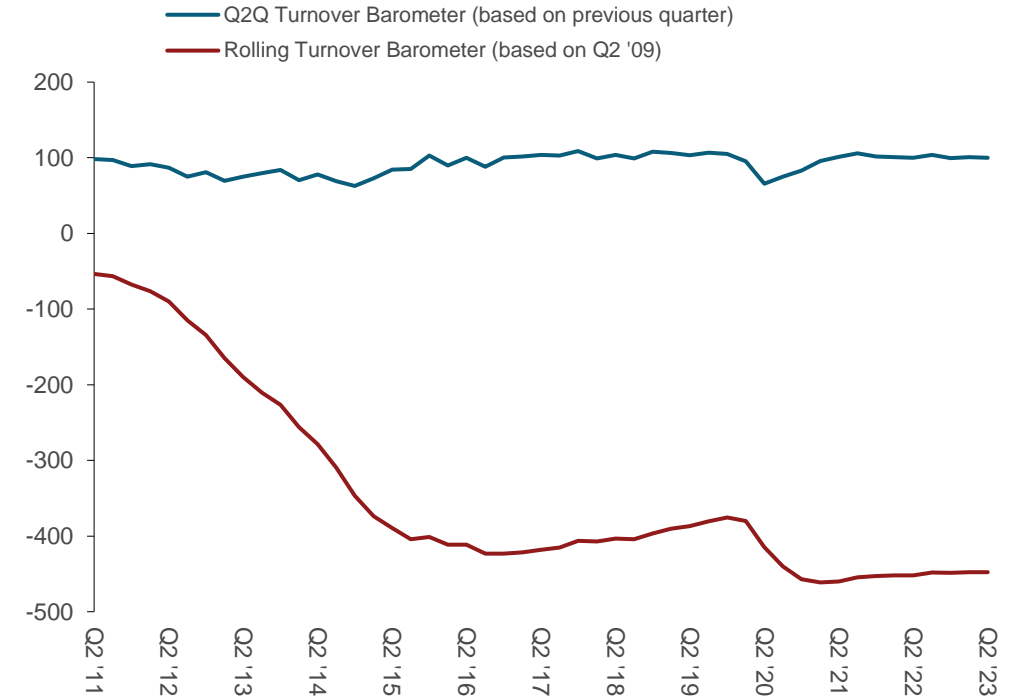
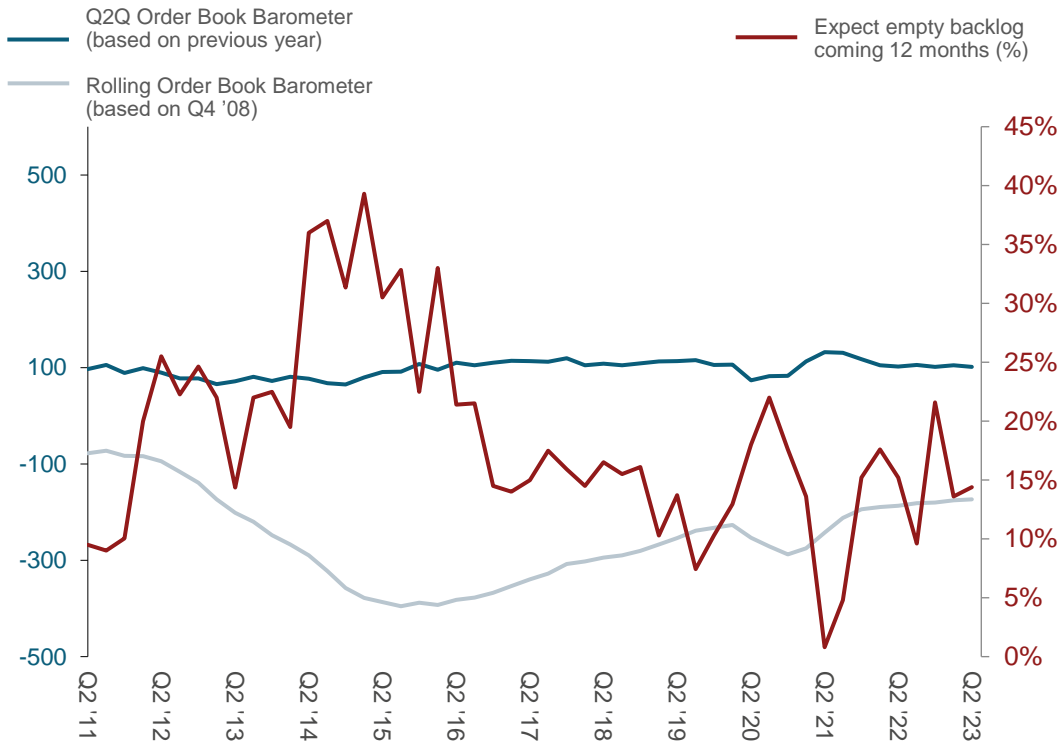
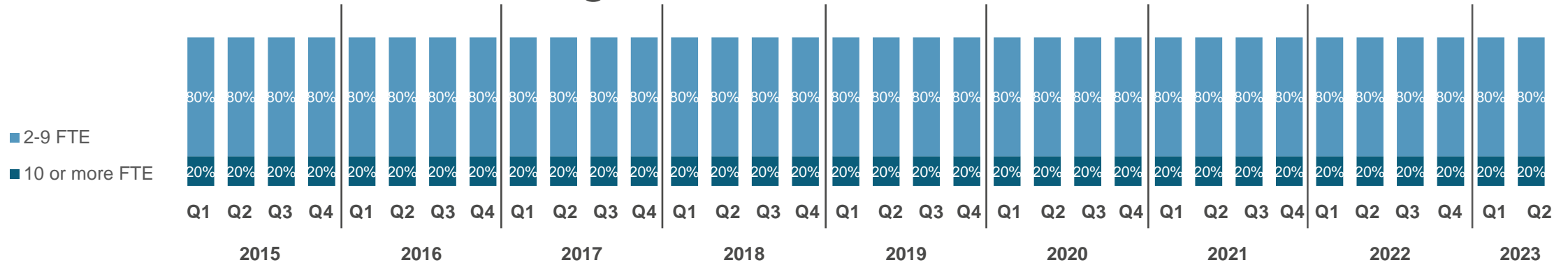
Short-term outlook among British architects



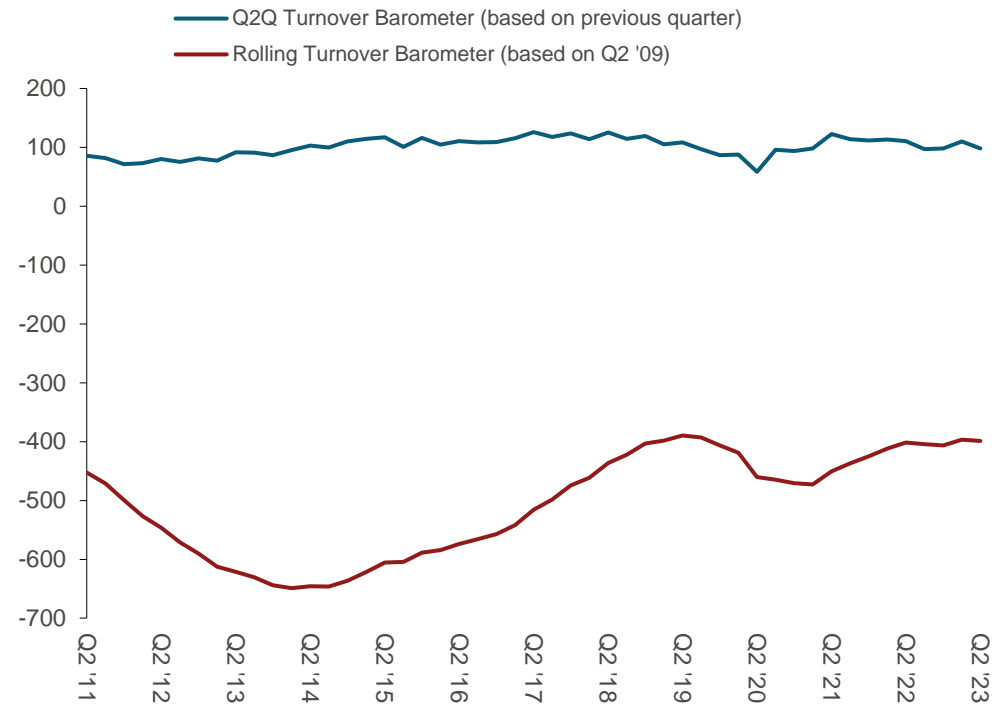
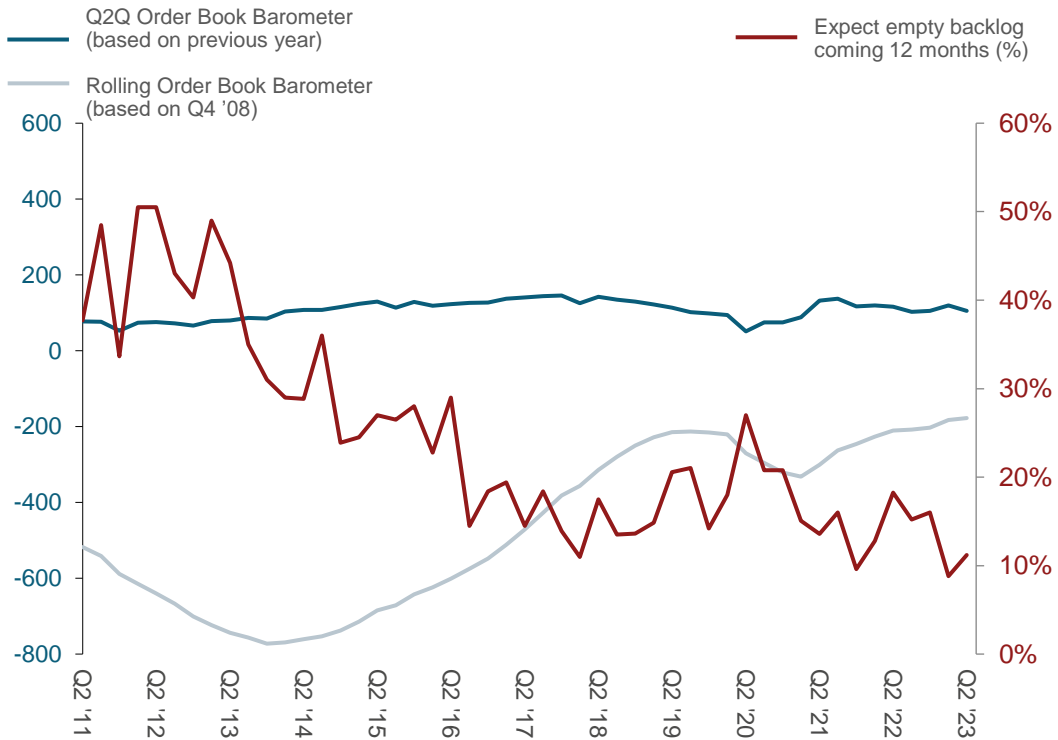
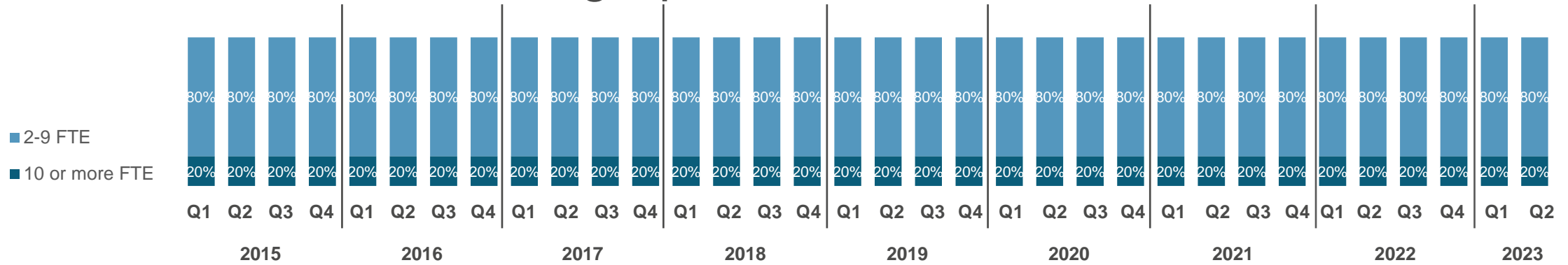
Short-term outlook among German architects



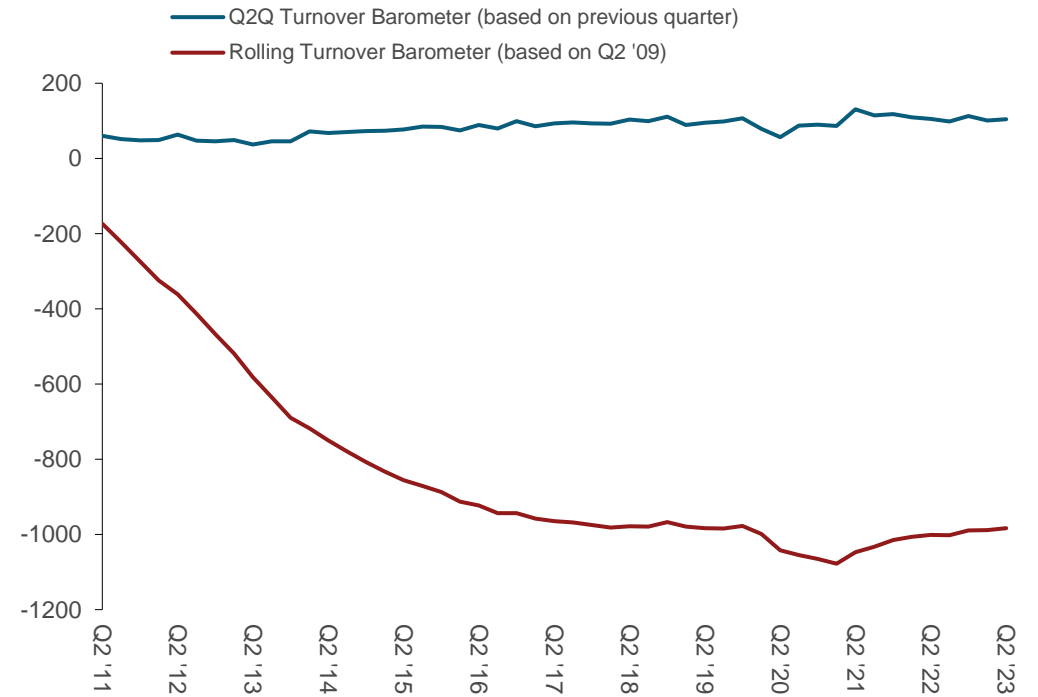
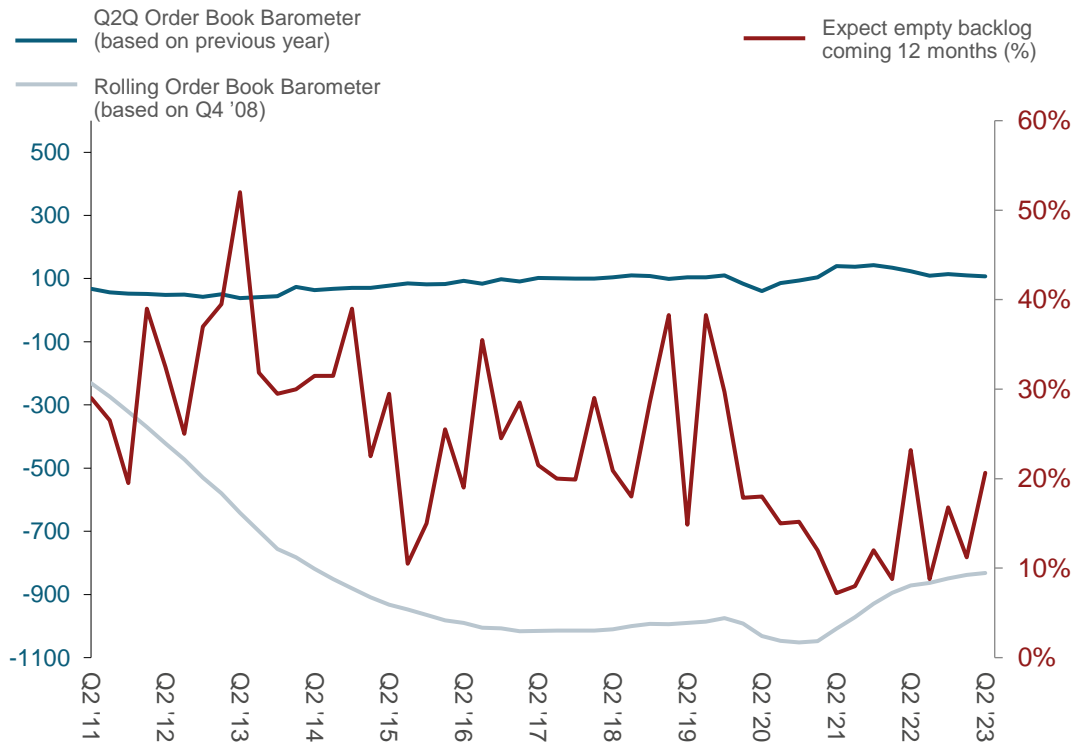
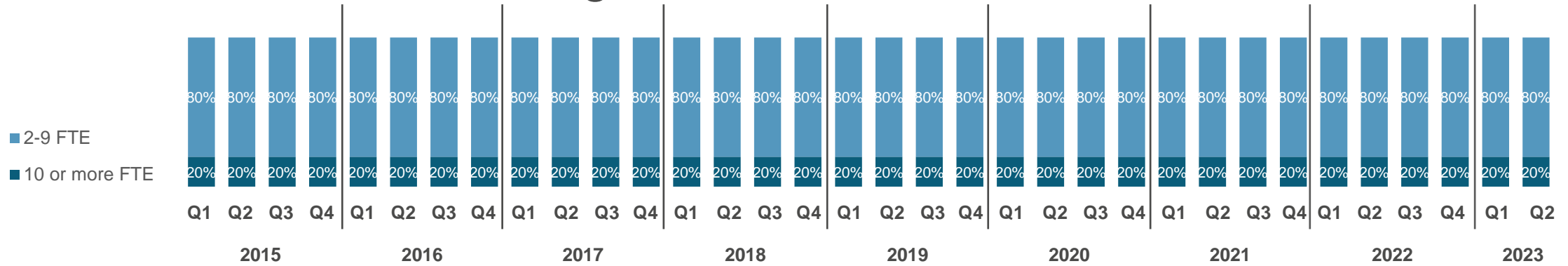
Short-term outlook among French architects



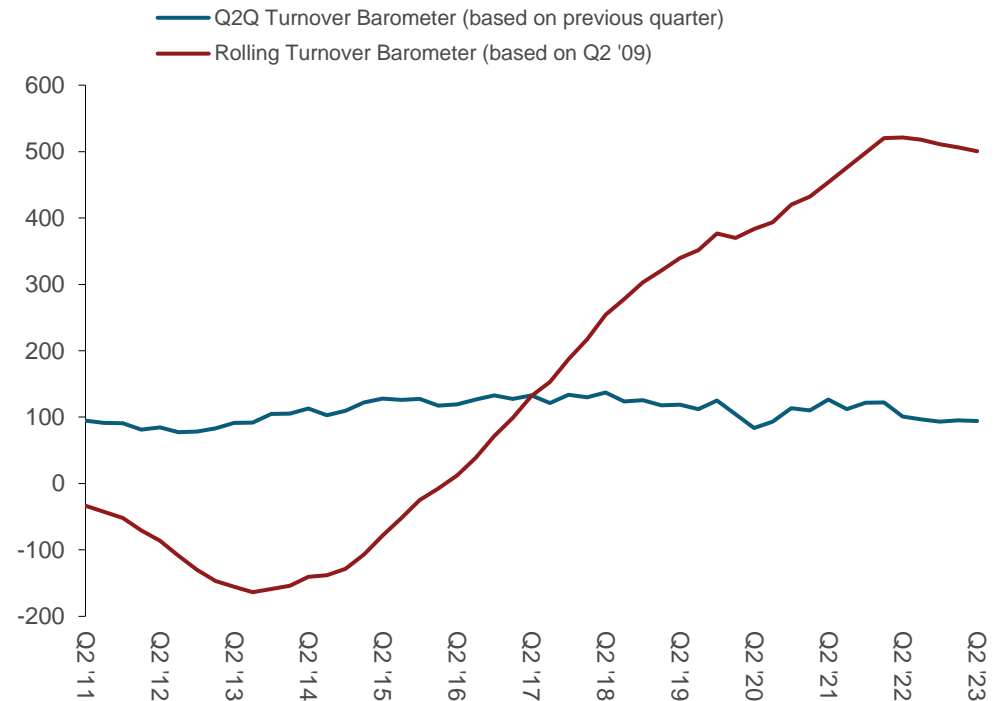
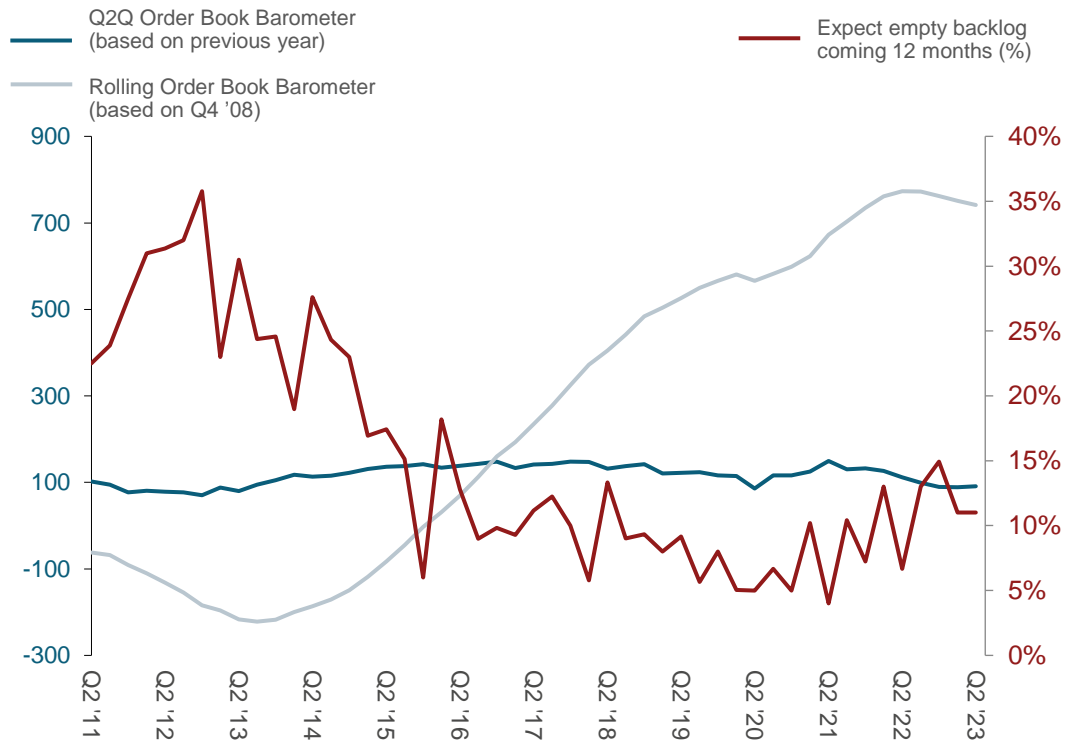
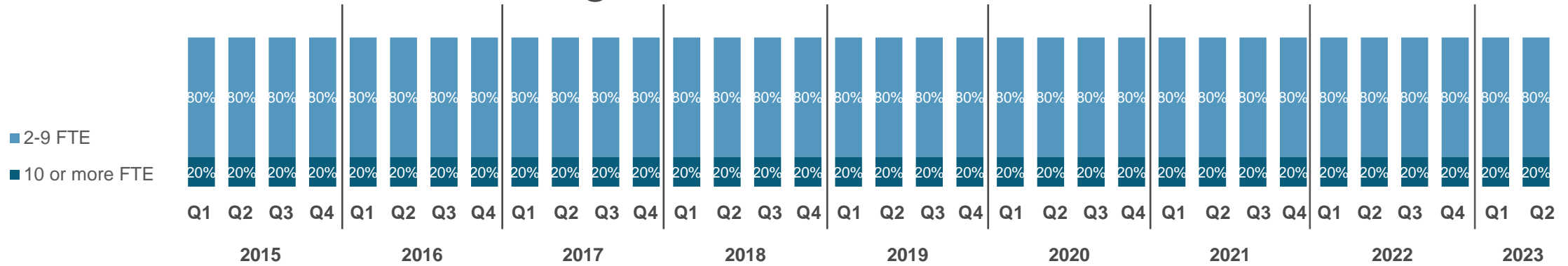
Short-term outlook among Spanish architects



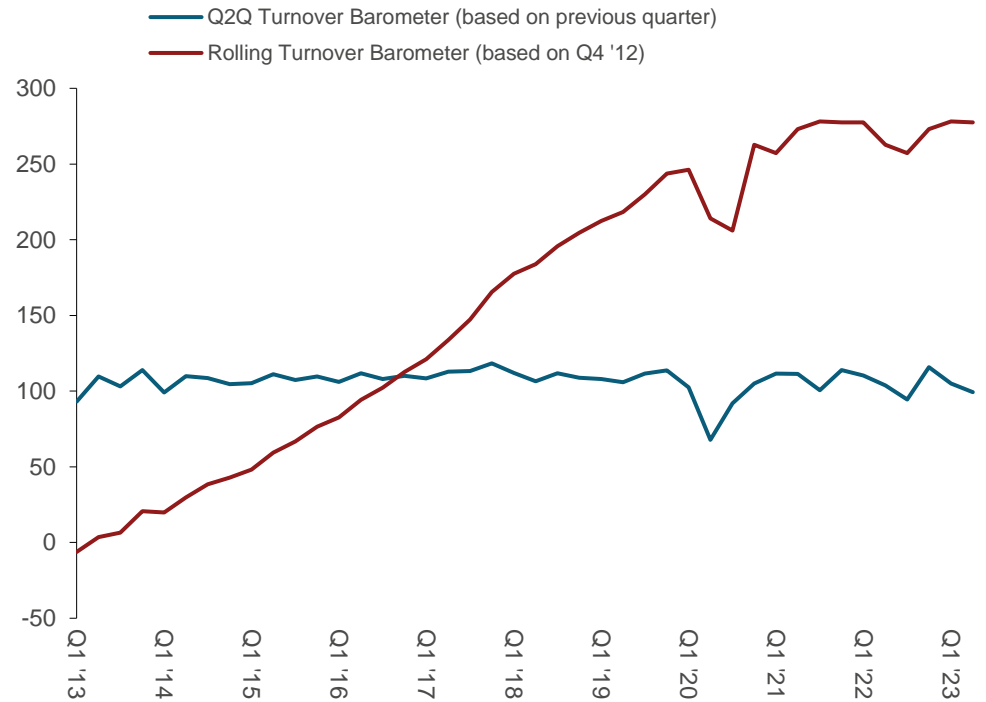
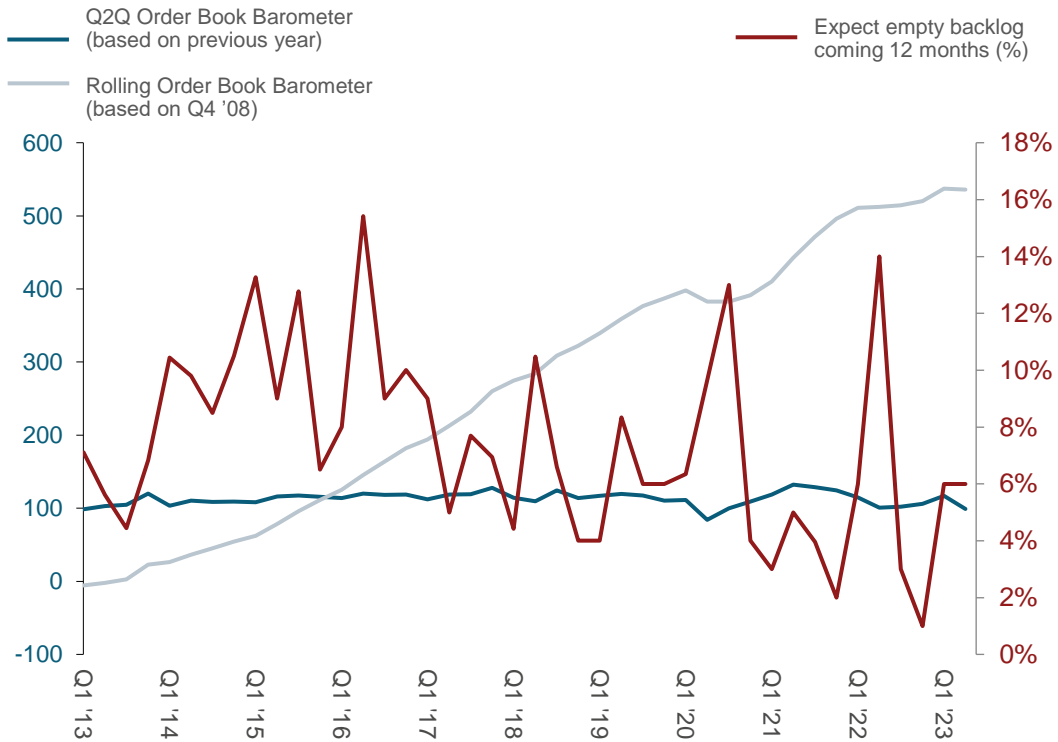
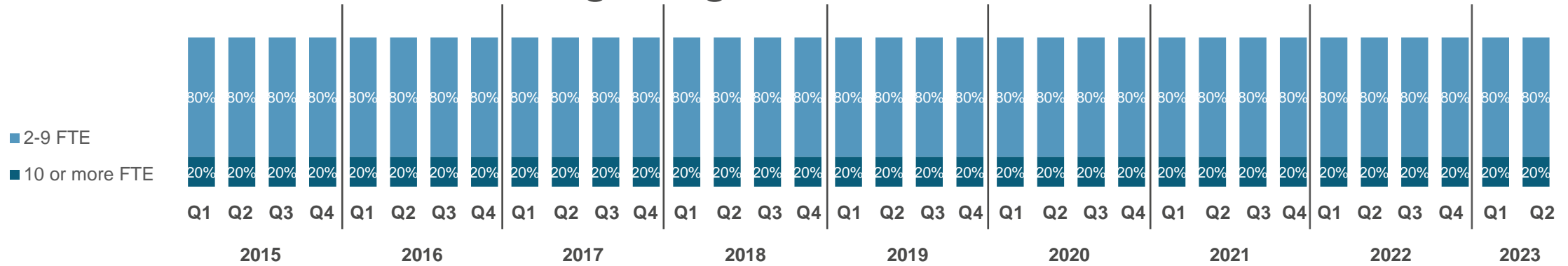
Short-term outlook among Italian architects



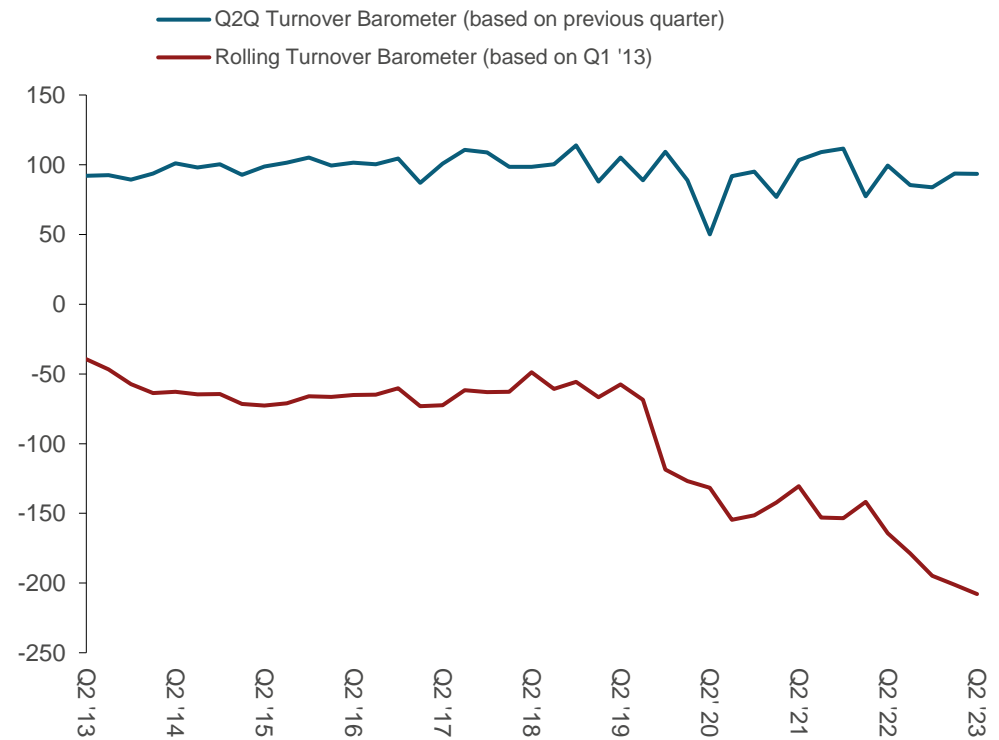
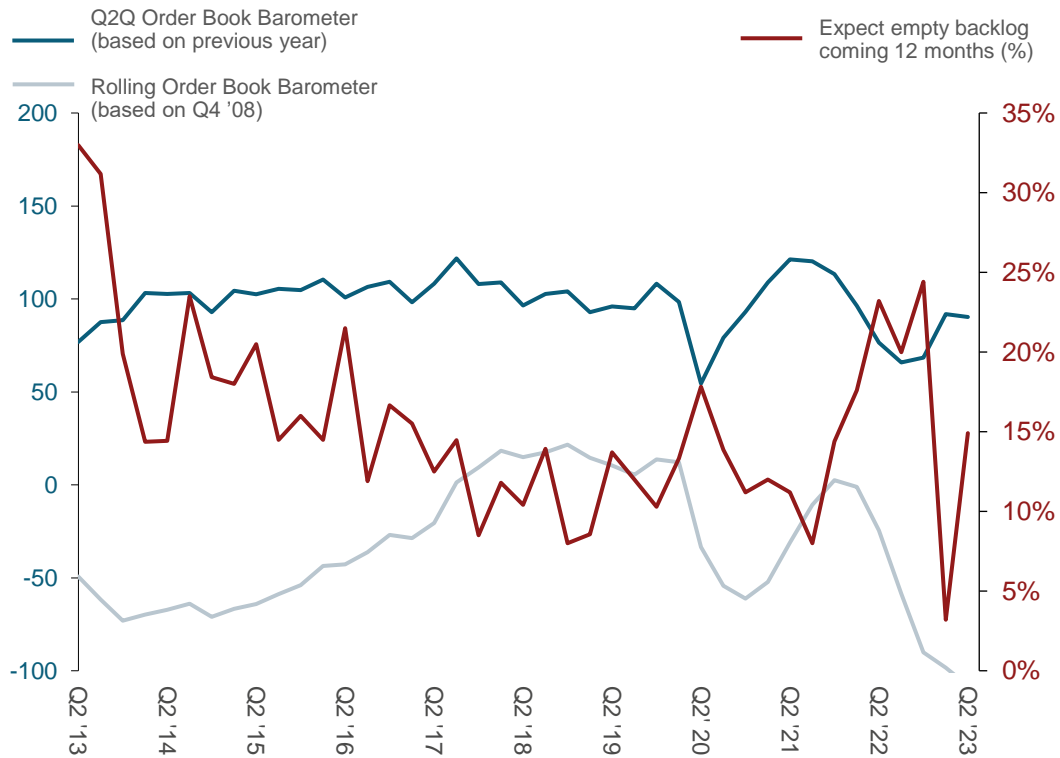
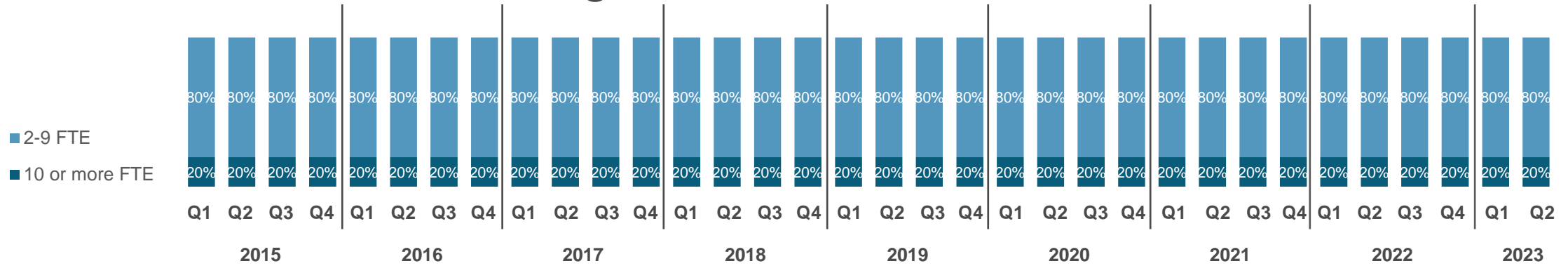
Short-term outlook among Dutch architects



Short-term outlook among Belgian architects











Short-term outlook among Polish architects



Development turnover and order book









Development turnover

(based on previous quarter)

% sales in non-residential																											
	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100			
Strongly increased (>5%)	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%
Slightly increased (0-5%)	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%
Stayed the same (0%)	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%
Slightly decreased (0-5%)	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%
Strongly decreased (>5%)	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%
Barometer turnover	98	98	98	98	98	98	98	98	98	98	98	98	98	98	98	98	98	98	98	98	98	98	98	98	98	98	98









Development order book

(based on previous year)

% sales in non-residential																											
	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100			
Strongly increased (>5%)	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%
Slightly increased (0-5%)	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%
Stayed the same (0%)	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%	52%
Slightly decreased (0-5%)	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%
Strongly decreased (>5%)	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%	13%
Barometer order book	98	98	98	98	98	98	98	98	98	98	98	98	98	98	98	98	98	98	98	98	98	98	98	98	98	98	98

Expectation empty order book in the next 12 months

Expectation empty order book in the next 12 months

% sales in non-residential																								
	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100			
Yes	44%	44%	44%	44%	44%	44%	44%	44%	44%	44%	44%	44%	44%	44%	44%	44%	44%	44%	44%	44%	44%	44%		
No	47%	47%	47%	47%	47%	47%	47%	47%	47%	47%	47%	47%	47%	47%	47%	47%	47%	47%	47%	47%	47%	47%		
Do not know	9%	9%	9%	9%	9%	9%	9%	9%	9%	9%	9%	9%	9%	9%	9%	9%	9%	9%	9%	9%	9%	9%		

Sample and methodology of the research

Most architectural firms have less than two FTE. Nevertheless, the focus of the European Architectural Barometer is on the larger firms. Therefore, the research is only conducted among architectural firms with two FTE and more. As the study is focused on architects active in construction, architects that are solely active in interior or landscaping are excluded from the research.

The table below shows the number of successful interviews in each country. The difference between the gross sample of respondents that were reached (all reached numbers) and the net sample of respondents that were reached, was caused by those architects who could not be contacted or had an incorrect phone number, and those who did not meet the selection criteria (mostly due to the fact that the architectural firms had less than two FTE). The difference between the net sample of respondents reached and the response are the number of architects who refused to participate.

Response

								
Gross sample (all attempts to approach respondents)	1000	1000	1000	1000	1000	1000	1000	1000
Net sample (all approached respondents)	1000	1000	1000	1000	1000	1000	1000	1000
Completed interviews	1000	1000	1000	1000	1000	1000	1000	1000
Response percentage (interviews/ net sample)	100%	100%	100%	100%	100%	100%	100%	100%

Methodology calculation of the Q2Q Saldo and Barometer


The European Architectural Barometer for the order book development and turnover development is calculated in the following way:

1. Respondents with a strong increase (>5%) are multiplied by 100
2. Respondents with a slight increase are multiplied by 50
3. Respondents that remained the same are multiplied by 0
4. Respondents with a slight decrease are multiplied by -50
5. Respondents with a strong decrease (>5%) are multiplied by -100
6. The sum of these values divided by 100, results in the Q2Q saldo.
7. Adding 100 to this saldo results in the Barometer figures, where 0 is the strongest possible decrease, 100 is stabilisation and 200 is the strongest possible increase.

The Barometer values calculated this way are presented in the report as Quarter to Quarter Turnover and Order book Barometer.

Example of calculation Q2Q Barometer value:

Development Turnover Spain	Q2 '15		Calculated Values
Increased by more than 5%	25%	x 100	2500
Slightly increased (0-5%)	28%	x 50	1400
Stayed the same (0%)	36%	x 0	0
Slightly decreased (0-5%)	3%	x -50	-150
Decreased by more than 5%	8%	x -100	-800



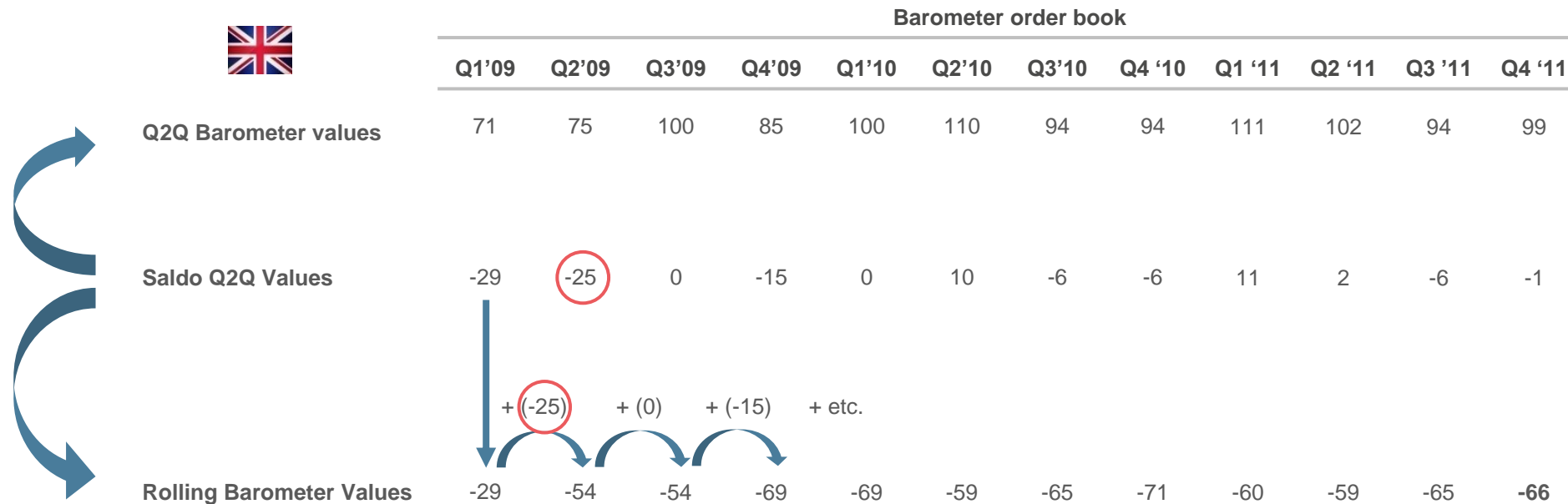
$$\text{Q2Q Saldo} = (2500 + 1400 - 150 - 800) / 100 = 30$$

$$\text{Q2Q Barometer value} = 100 + 30 = \mathbf{130}$$

Methodology calculation of the Q2Q Saldo and Barometer

To calculate the developments in the turnover and the order book with regard to the first measurement in 2009, Arch-Vision has developed the so-called Rolling Barometer. The Rolling Barometer is calculated as the cumulative sum of the Q2Q saldos of every quarter. The Rolling Barometer can drop or rise by 100 points per quarter at maximum.

Example: The Rolling Order Book Barometer is -66 after twelve quarters. In the worst case (all architects reporting a decrease of over 5% every quarter) the Rolling Barometer would be -1200. In the best case it would be 1200. Therefore a score of -66 in Q4 2011 means a slightly worse situation than in Q4 2008.



Future building volumes: building a model for prediction

Building volumes

Architects are at the front of the construction sector. They are the first to perceive positive and negative changes. The current developments of architectural firms have a strong predictive impact on the total market. USP publishes its predictions for the building volumes based on the developments experienced by architects.

The model

USP uses a model based on eleven market indicators and USP's own results. The model combines information about the economy, like construction requests and confidence figures, with data about the developments within architects' experience, such as changes in the turnover and the number of active architects. Only information that proved to have a strong correlative value on the building volume is used. Subsequently, every kind of data is weighed based on the predictive value.

High predictive value

To ensure the correctness of the predictive value, the model has been – with retroactive effects – compared to the actual growth and shrinkage of the construction volume since 2003 for the Dutch* market and since Q3 2009 for the remaining countries. The model turns out to possess a very high predictive value. Nevertheless, the forecast has to be interpreted with caution, as it remains a calculation. As with all predictions, the margin of error can be larger, comparable to the weather forecast: sometimes the USP model can be inaccurate.

Calculation predictive value

The predictive value is calculated based on the consistency of the market indicators with construction volumes, for the renovation, maintenance and the new build markets. The correlation is determined by a regression analysis, i.e. a statistical technique for analysing data in which there is a (possible) specific connection, known as regression.

** Since 2003, the developments of architects in the Netherlands have been monitored by USP's sister organisation BouwKennis. Therefore, it is possible for the Netherlands to calculate the connection between the architects and the building volume based on 10 years of data.*

Future building volumes: Calculation

The Dutch market has been taken as a basis. The correlation between market volume regarding new build, maintenance and renovation on the one hand, and possible explanatory factors on the other hand, serves as a starting point.

The correlation with building volumes is tested for a total of eleven market indicators together with two outcomes of the European Architectural Barometer. The correlation of the following four indicators appeared to be strongest:

- Building permits – m² of useful floor area in non-residential buildings
- Building permits, number of dwellings
- Development of Turnover Barometer (European Architectural Barometer figures)
- Number of FTE working at architectural companies (European Architectural Barometer figures)

The predicting value of these indicators is between 54% and 91%. Because a longer history of data was not available for most countries, the development of these four indicators in the last four quarters and the four quarters before served as a guidance for this measurement. The used range of five indicators is not static and can be adjusted for future calculations. With the database becoming more complete, more reliable correlations can adjust the mix of indicators. A longer range of regression measurements shall replace the comparison of the last four quarters with the four quarters before.

The forecast is based on the market knowledge of USP Marketing Consultancy together with the market figures available, such as building permits and the developments among architects who are mainly active in renovation or new build as well as mainly active in residential or non-residential. Due to the limited number of quarters, a forecast based on a statistical model is not possible for now. The model that was used has a lower prediction value for this period. However, USP Marketing Consultancy aims at clarifying the general direction of the construction market development by publishing these data and the predictions will be updated in the coming reports.

Questionnaire – Standard

These questions are asked every measurement

1. How many employees (in FTE) does your company currently have, including yourself? [if less than 2 FTE, end of research]
2. As an architectural firm, are you mostly active in the segment housing, non-residential building, interior, or landscaping? [If interior or landscaping, end of research]
3. What is your position?
4. How many employees in FTE did your company have at the end of 2021?
5. How many employees in FTE did your company have at the end of 2020?
6. How many employees in FTE did your company have at the end of 2019?
7. If your turnover should relate to housing and non-housing, what percentage of your revenue do you get from housing-related jobs?
8. Are you mostly active in new build or renovation?
9. How did the turnover develop this quarter compared to the previous quarter? Decreased by more than 5%; slightly decreased (0-5%); stayed the same (0%); slightly increased (0-5%); strongly increased (more than 5%)
10. What are your expectations for the development of your turnover in the fourth quarter of 2022 in comparison to the turnover in the fourth quarter of 2021? Decreased by more than 5%; slightly decreased (0-5%); stayed the same (0%); slightly increased (0-5%); strongly increased (more than 5%)
11. How did your order book develop in this quarter compared to the same quarter previous year? Decreased by more than 5%; slightly decreased (0-5%); stayed the same (0%); slightly increased (0-5%); strongly increased (more than 5%)
12. How many new projects has your company scored/been commissioned in the past two months?
13. How many projects have been postponed in this quarter?
14. How many projects were not started and cancelled in this quarter?
15. Do you expect that your order book might be empty these coming 12 months?

Questionnaire – Theme questions

1. What describes sustainable construction best according to you?
2. And what do you think are the most important characteristics of circular economy in the construction sector?
3. How does your organization see the connection between circular construction, CO2 reduction, energy efficiency and sustainability?
 - As separate topics with no connection
 - As separate topics but with some connection
 - As part of the bigger picture, one cannot see one topic without the other
4. To what extent do your clients ask for sustainability and are they willing to invest more in it?
5. How much more are clients willing to invest when presented with sustainable products or solutions?
6. What would be approximately the share of your projects where sustainability is taken into account?
7. Which other stakeholders besides architects are influential when it comes to promoting sustainable construction?
8. To what extent do you see the following issues as a problem for the transition to a sustainable and circular construction sector?
9. What actions do you take as a company to create a sustainable building project?
10. Which sustainability certifications (schemes) are most important in the construction industry?

Questionnaire – Theme questions

11. Are you familiar with the terms ...?

- Material passport
- EPD (Environmental Product Declaration)
- Urban mining
- C2C certified products (C2C = Cradle to Cradle)

12. Does your organization make use of...?

- Material passport
- EPD (Environmental Product Declaration)
- Urban mining
- C2C certified products (C2C = Cradle to Cradle)

13. Why isn't your organisation working (more) with EPD's?

14. Do you think that ... offers added value for implementing in your own projects in a more circular way?

- Material passport
- EPD (Environmental Product Declaration)
- Urban mining
- C2C certified products (C2C = Cradle to Cradle)

15. What are innovative product solutions with regard to sustainable and circular construction that are already being used?

16. Which building components do you think contribute the most to create a sustainable building?

17. How can manufacturers of building and installation materials contribute to create a more sustainable and circular construction sector, both generic as and at a construction site specifically?

About USP

USP Marketing Consultancy



Head office Subsidiaries



Rotterdam Düsseldorf Zagreb




Total **70**



Research Analysts Project managers

Consultants



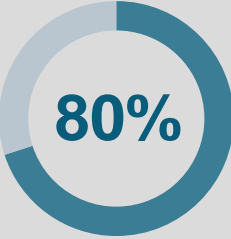
Market specialist
installation, construction, home improvement and real estate

Dedicated and multi-client research

Active in the market for 29 years

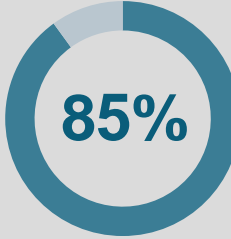
250+ dedicated market research projects annually

Revenue distribution



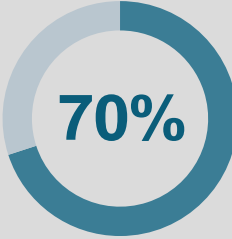
80%

turnover coming from international projects



85%

turnover coming from dedicated market research, 15% from multi client



70%

turnover coming from B2B, 30% B2C

Research in **31** countries in 2021



43
focus groups



1,778
in-depth interviews



63,758
B2B CATI interviews



54,850
B2C online interviews



What we do

Examples



Segmentation



**Customer
journey**



Branding



**Concept/
product
research**



**Customer
satisfaction**



Trends



**Distribution
research**



**Market
exploration**



Pricing









**Market
size**



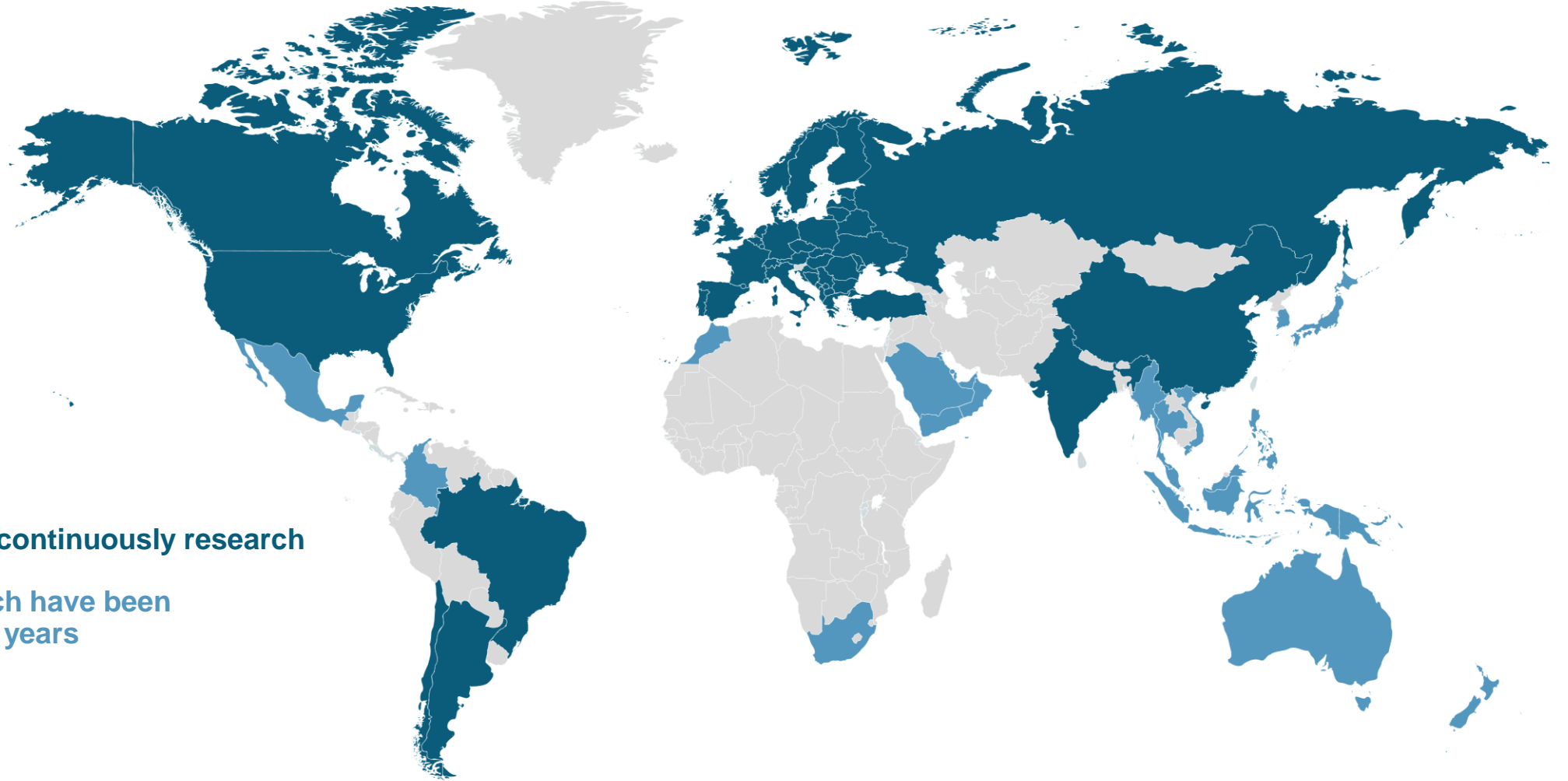
Dedicated market research

- Tailor made
- Driven by your information needs
- Advice & consultancy based on facts and over 25 years of experience in the industry
- Worldwide coverage
- B2B, B2C, qualitative and quantitative research or a combination of both
- Within our market specialism, all types of researches can be conducted
- Targeting the right audience, with the right questions at the right time.

Our multi-client research monitors

	European Architectural Barometer	European Contractor Monitor	European Mechanical Installation Monitor	European Electrical Installation Monitor	European Painter Insight Monitor	European Home Improvement Monitor
Target group	Architects	Building contractors	HVAC installers	Electrical installers	Professional painters	Consumers
Methodology						
Annual sample size	3,400 interviews	2,050 interviews	2,600 interviews	3,000 interviews	2,300 interviews	26,400 interviews
Country scope	<ul style="list-style-type: none"> • Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy 	<ul style="list-style-type: none"> • Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy 	<ul style="list-style-type: none"> • Germany • United Kingdom • France • Netherlands • Belgium • Poland 	<ul style="list-style-type: none"> • Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain 	<ul style="list-style-type: none"> • Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy • Denmark • Sweden 	<ul style="list-style-type: none"> • Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy • Denmark • Sweden • Austria
Way of reporting	Quarterly	Bi-annually	Quarterly	Quarterly	Annually	Quarterly
2022 Theme topics	<ul style="list-style-type: none"> • Q1: Sustainability • Q2: Trends in material usage • Q3: Decision making • Q4: Brand health scan 	<ul style="list-style-type: none"> • H1: Prefabrication • H2: Digitalisation and BIM 	<ul style="list-style-type: none"> • Q1: Digitalisation and BIM • Q2: Prefabrication • Q3: Smart buildings and products • Q4: Media orientation 	<ul style="list-style-type: none"> • Q1: Sustainability • Q2: Smart buildings and products • Q3: Services in the installation market • Q4: Brand health scan 	<ul style="list-style-type: none"> • Trend tracking • Sustainability • Labour shortage • Online buying • Media orientation 	<ul style="list-style-type: none"> • Q1: Orientation; rise of digital natives • Q2: Purchase Channels; online leaders • Q3: Brand health check • Q4: DIY vs DIFM; outsourcing jobs

We are active globally



Countries which we continuously research

Other countries which have been researched in past 2 years

Principals of USP

Construction				DIY		Installation	

USP Marketing Consultancy

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