European Architectural Barometer Q4 2022

Love Brands

January-2022

ARCHVISION a product by USP Marketing Consultancy

About European Architectural Barometer

THE GOAL

The objective of the European Architectural Barometer of Arch-Vision 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

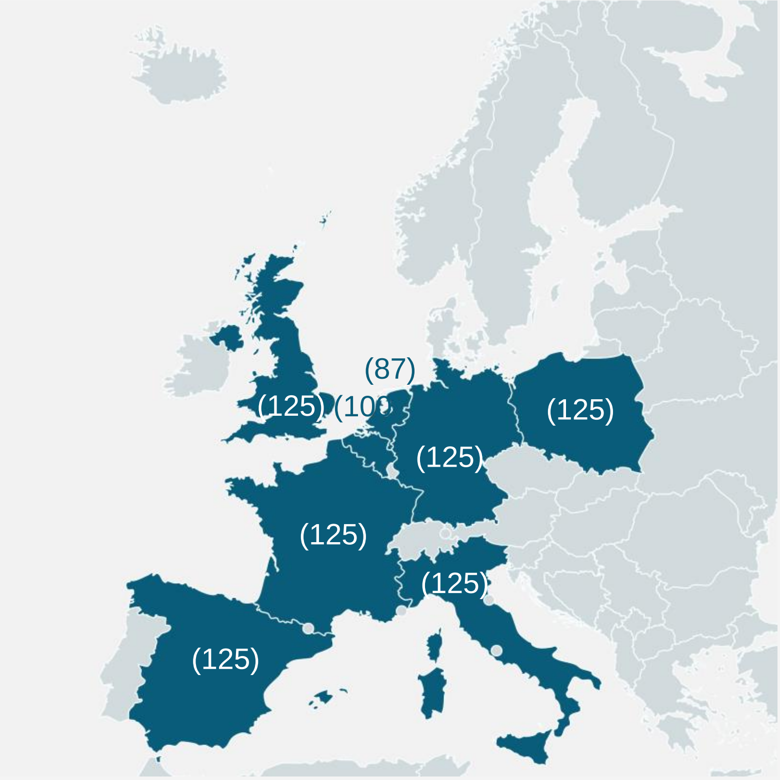
Recurring topic: Economic developments of architectural companies in Europe (order book and turnover development)

Quarterly theme topics in 2022:
Q1: Sustainability and Circularity
Q2: Trends in Material Usage
Q3: Decision Making in the Construction Industry
Q4: Love Brands

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.



THE TIMELINE

Report Q4	Report Q1	Report Q2	Report Q3
January	April	July	November

PROJECT TEAM

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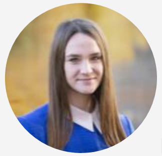

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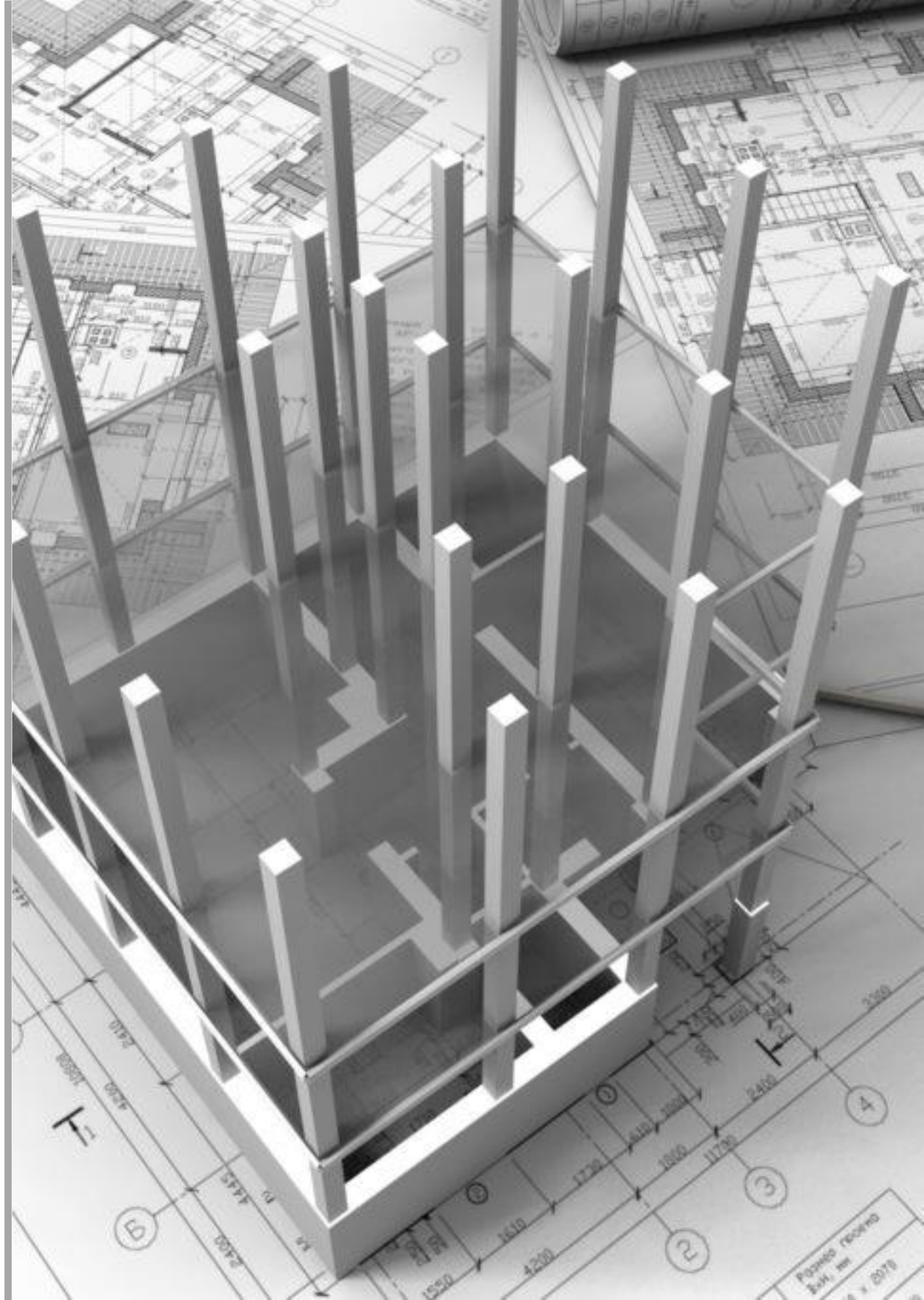
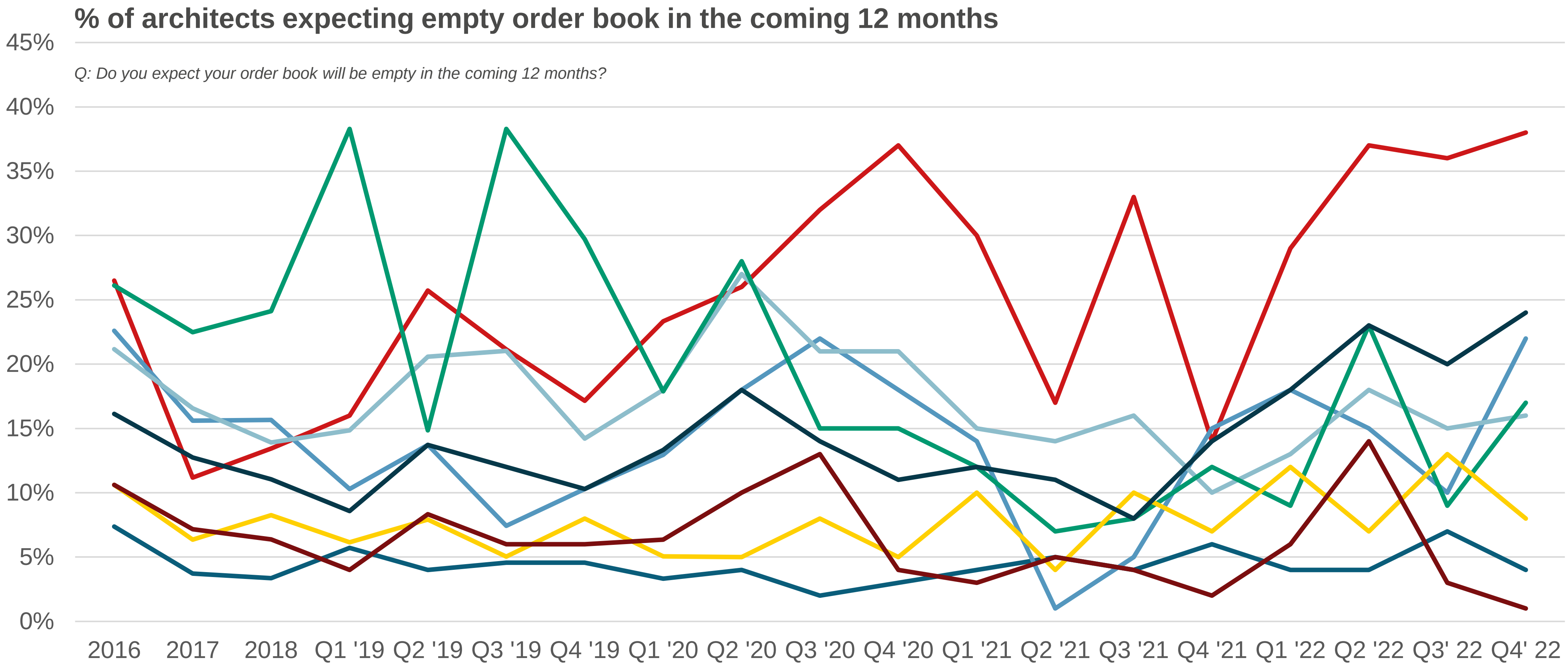


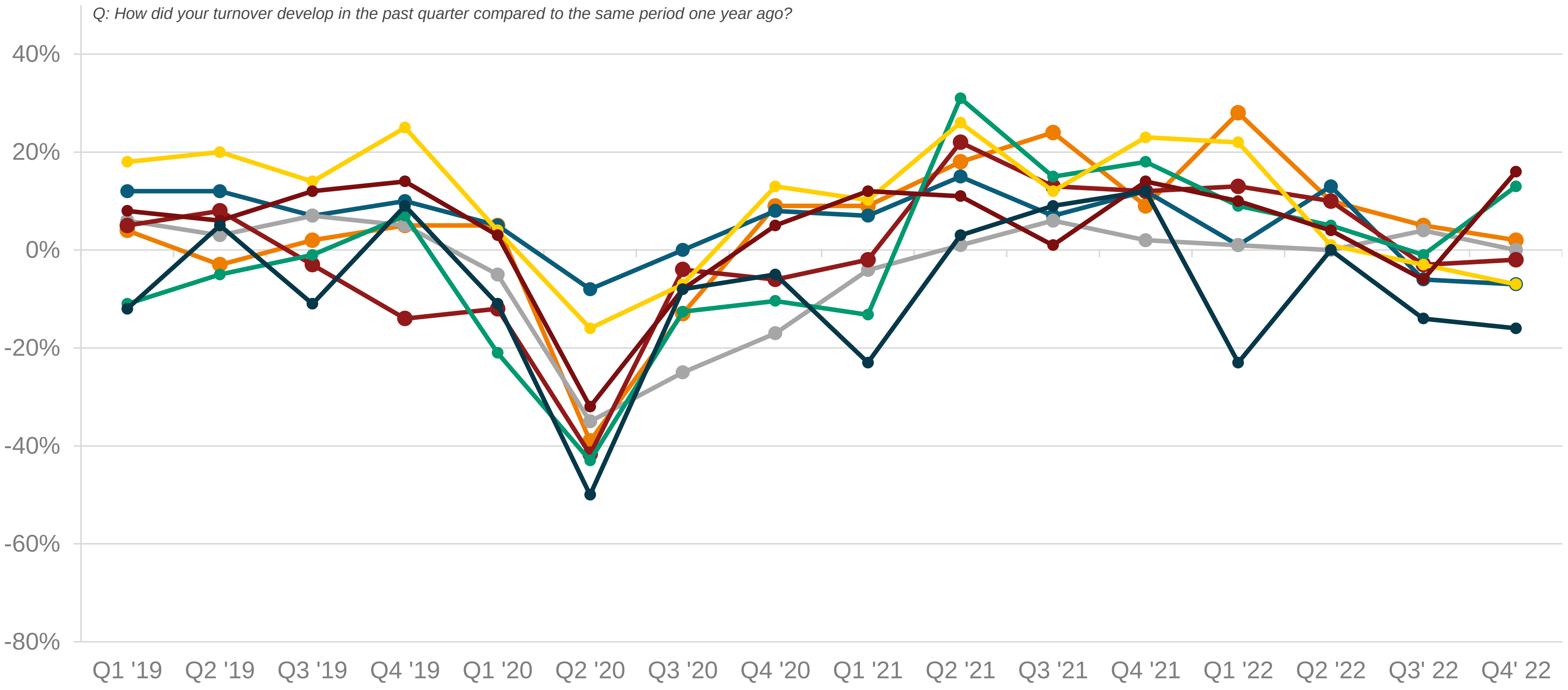
conclusion



% 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?
45%
40%
35%
30%
25%
20%
15%
10%
5%
0%
2016
2017
2018
Q1 '19
Q2 '19
Q3 '19
Q4 '19
Q1 '20
Q2 '20
Q3 '20
Q4 '20
Q1 '21
Q2 '21
Q3 '21
Q4 '21
Q1 '22
Q2 '22
Q3' 22
Q4' 22

conclusion

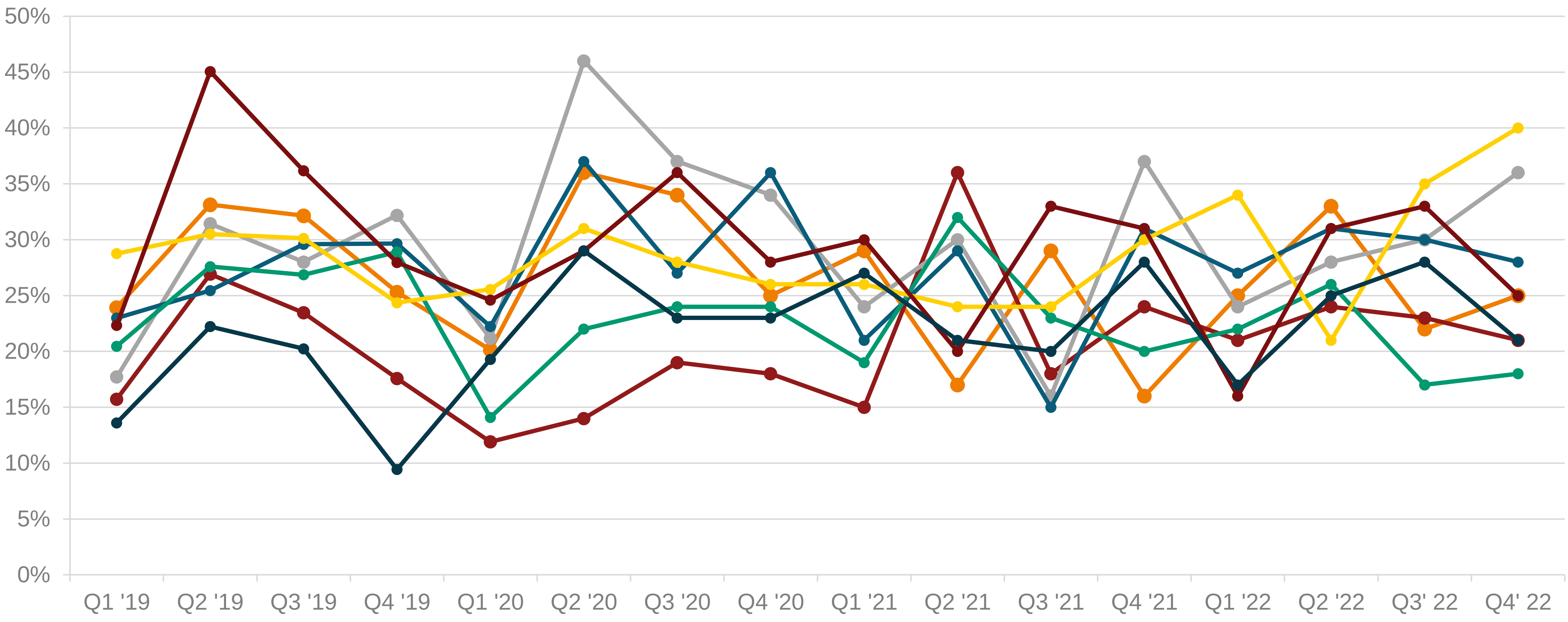
Architects' experience regarding their turnover
(saldo of architects reporting increase minus architects reporting a decrease)



conclusion

% of architects experiencing cancelled projects

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

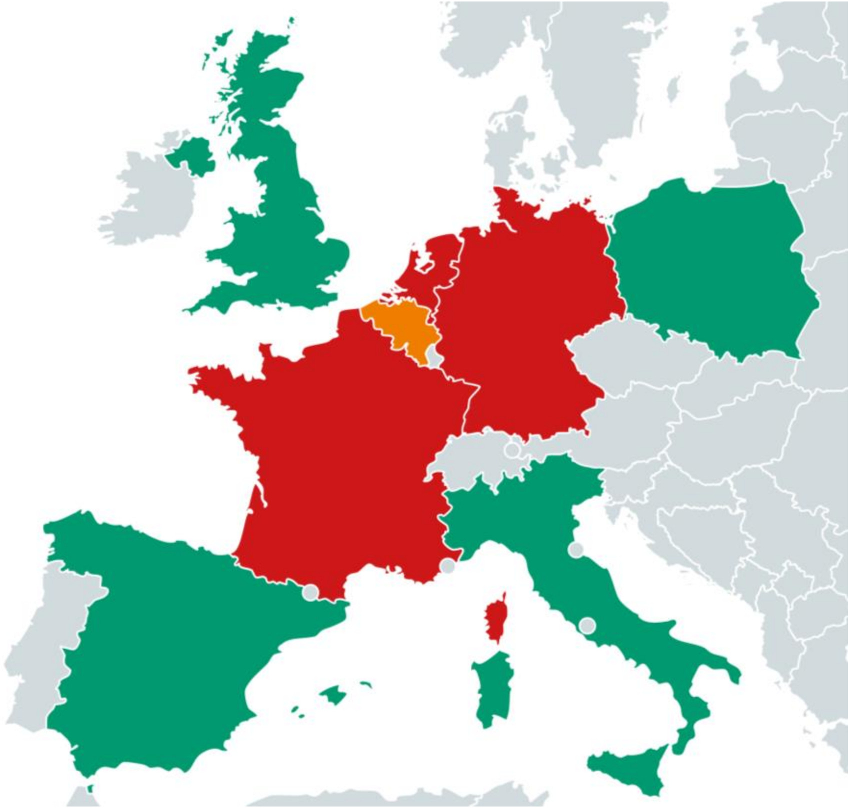


conclusion

•*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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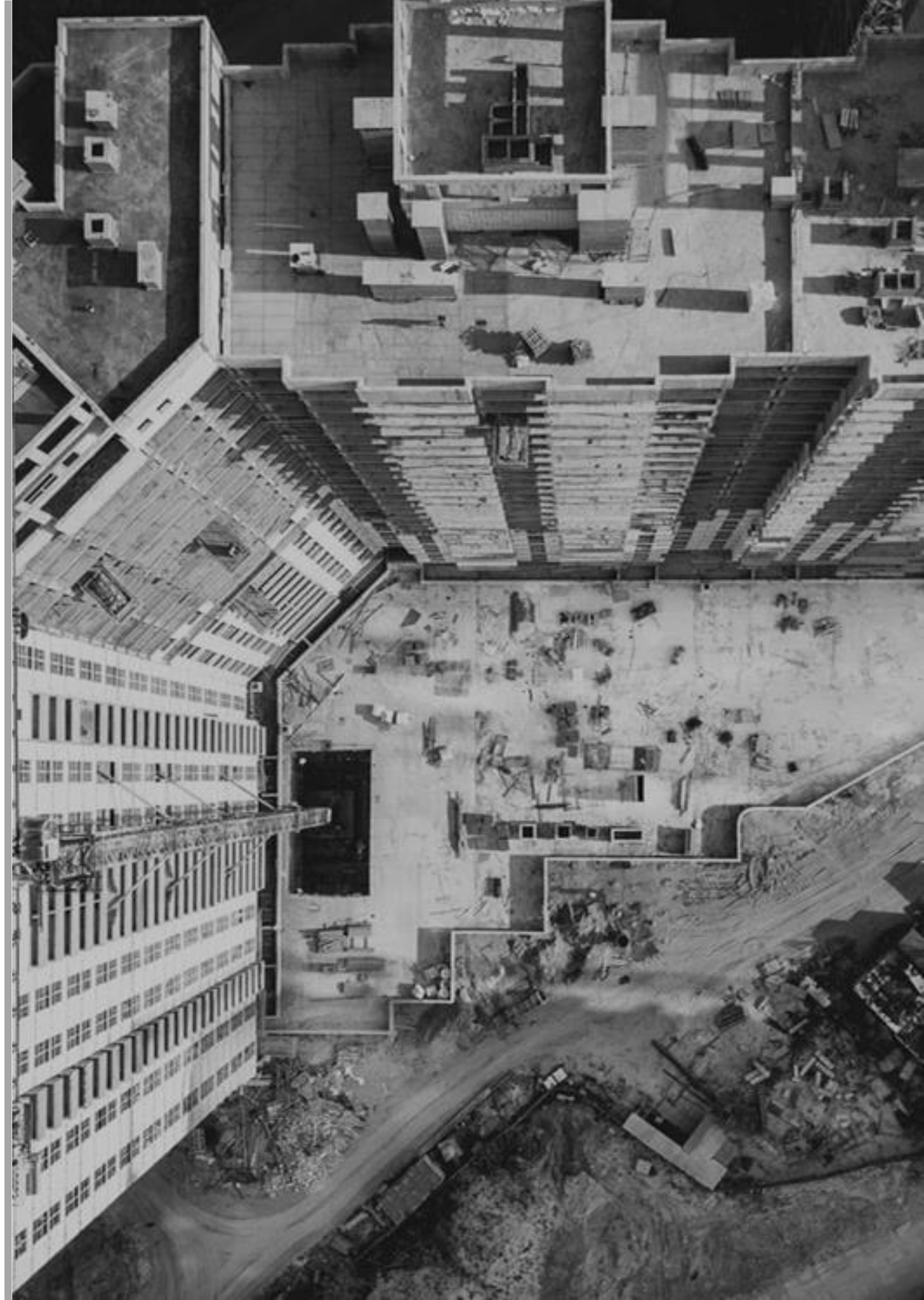

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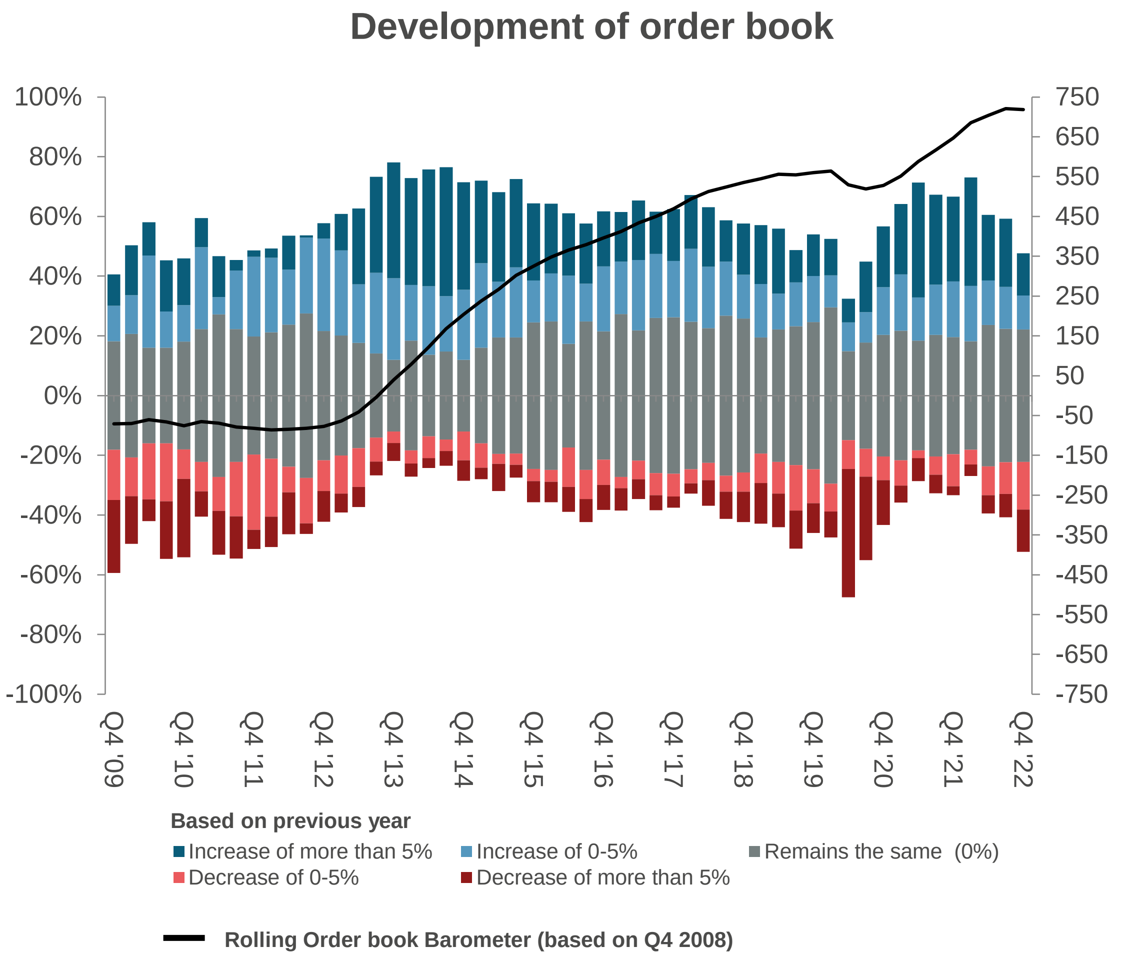
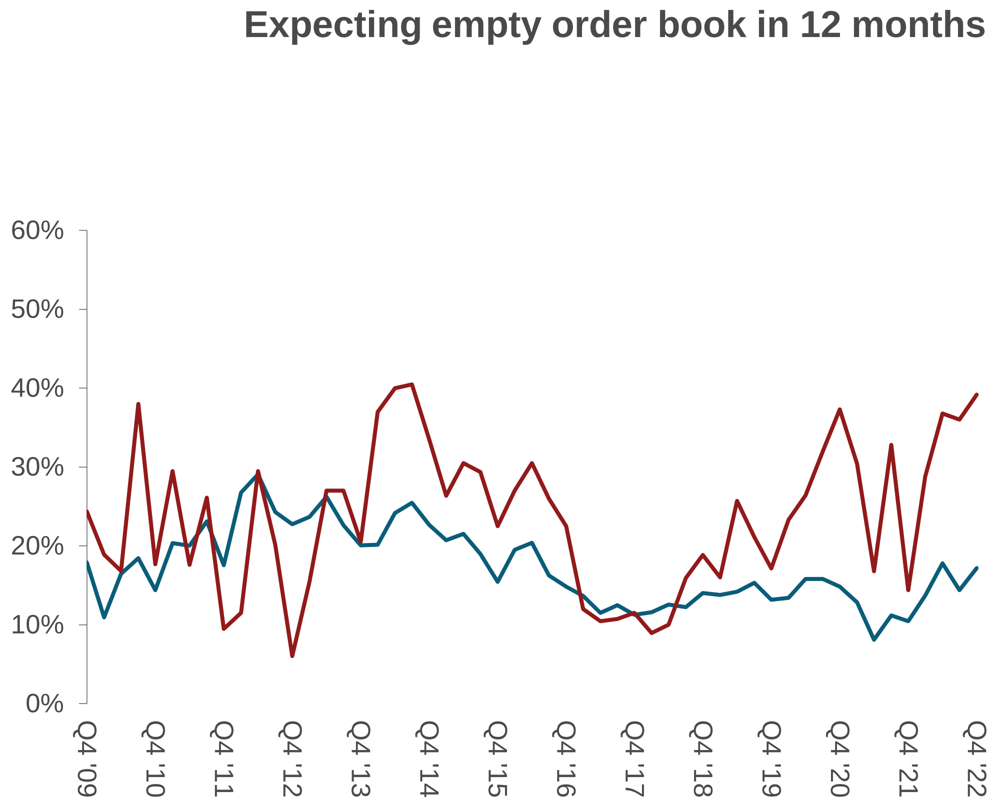
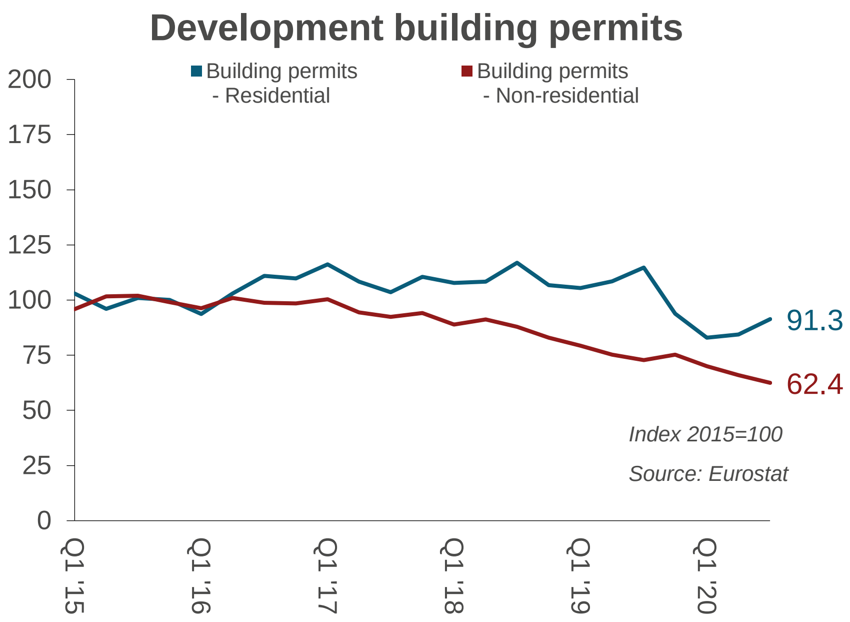
conclusion


Development of order book
100%
80%
60%
40%
20%
0%
-20%
-40%
-60%
-80%
-100%
750
650
550
450
350
250
150
50
-50
-150
-250
-350
-450
-550
-650
-750
Q4 '09
Q4 '10
Q4 '11
Q4 '12
Q4 '13
Q4 '14
Q4 '15
Q4 '16
Q4 '17
Q4 '18
Q4 '19
Q4 '20
Q4 '21
Q4 '22
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
60%
50%
40%
30%
20%
10%
0%
Q4 '09
Q4 '10
Q4 '11
Q4 '12
Q4 '13
Q4 '14
Q4 '15
Q4 '16
Q4 '17
Q4 '18
Q4 '19
Q4 '20
Q4 '21
Q4 '22

conclusion



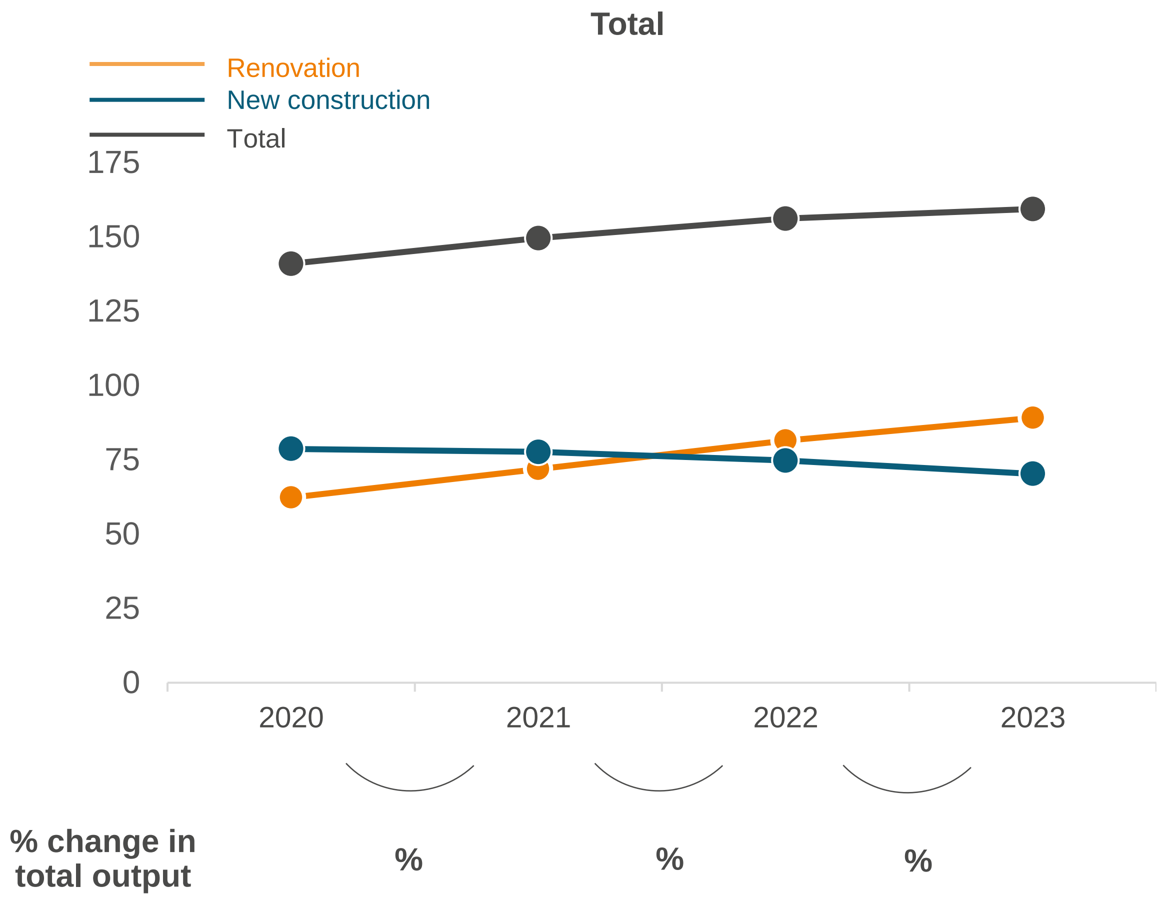
Economic and construction related indicators	**Value Q4 2021**	**Value Q3 2022**	**Value Q4 2022**	**Q-2-Q development**
GDP (quarterly growth rate) (%)*	5.4	0.2	n/a	Negative
Consumer confidence indicator**	n/a	n/a	n/a	
Industrial confidence indicator**	n/a	n/a	n/a	
Construction confidence indicator**	n/a	n/a	n/a	
Production value buildings (index 2015=100)**	100.0	n/a	n/a	
Architects with postponed projects (%)***	39	50	43	Positive
Architects with cancelled projects (%)***	29	34	22	Positive
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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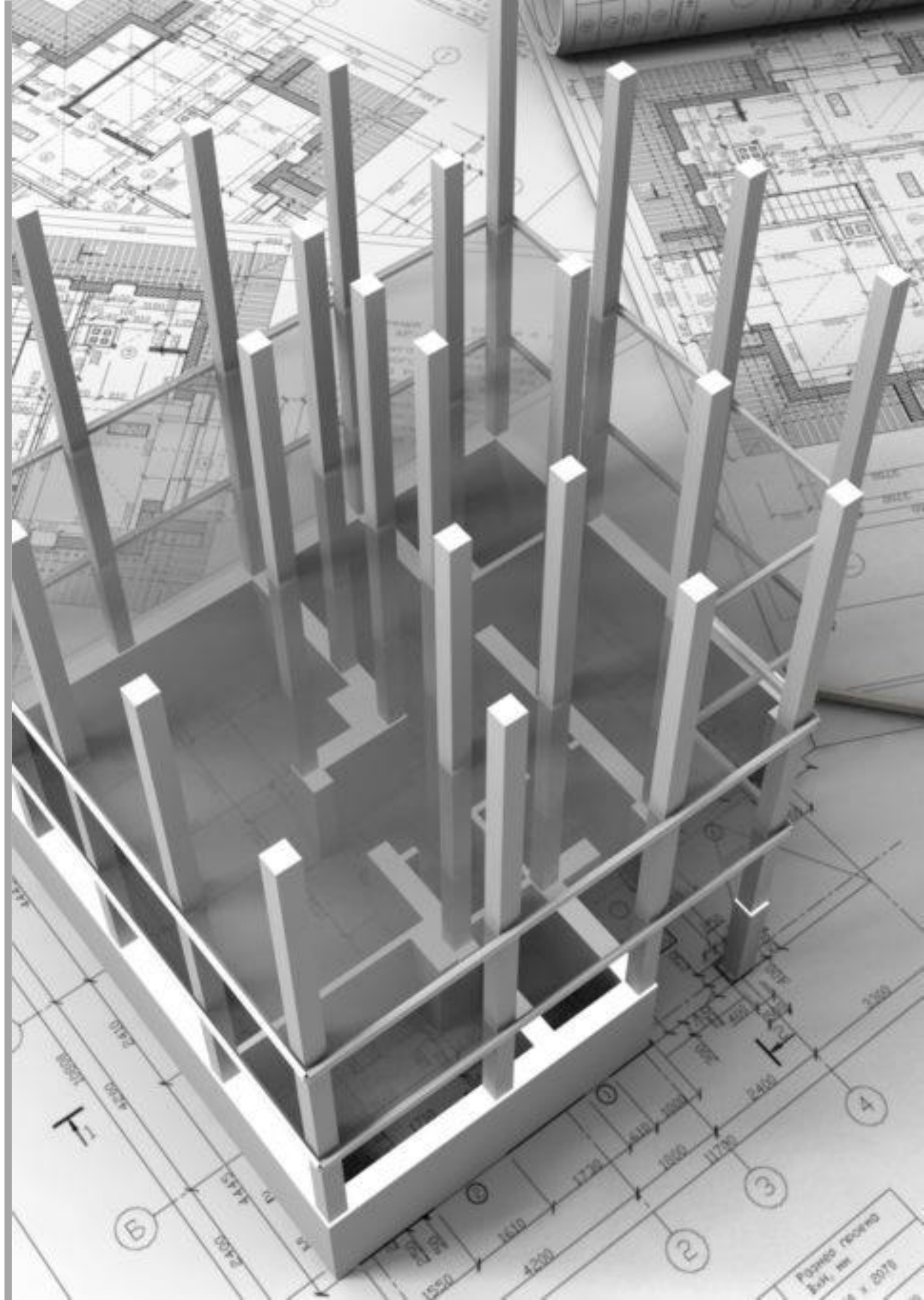

Measured product groups	
Floor and wall tiles	Sun cladding
Insulation materials	Waterproofing solutions
Floor covering products	Paint
Facade cladding	Ventilation and indoor climate solution
Bathroom products	Ceiling tiles
Daylight solutions	Masonry products
Lighting systems	Smart home systems

Note: product groups were randomised for all awareness and usage questions

USP

Explanation – **The brand awareness/usage combination**

Spontaneous Awareness →	**Usage →**

Spontaneous Awareness

- Which manufacturers of *floor and wall tiles* do you **know**?

[Spontaneous, multiple answers]

Usage

- Which manufacturers *of floor and wall tiles* do you **most commonly prescribe**?

[Asked for all the suppliers the respondent is familiar with]

Key insights: Love Brands

1

Conclusion

Conclusion

Key insights: Love Brands

2

Conclusion

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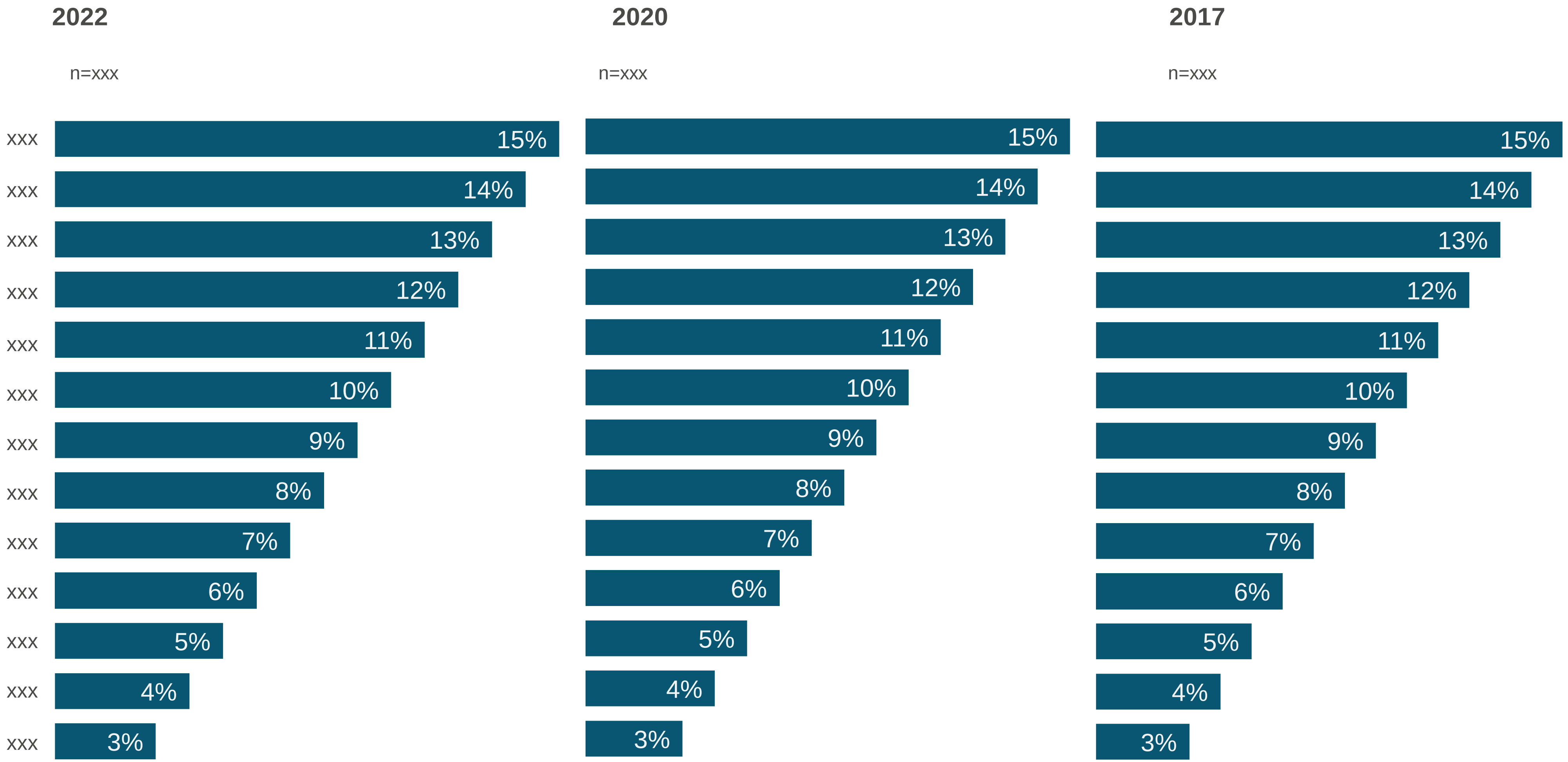
Conclusion

Leaders in construction industry

Which manufacturers do you consider to be leaders in the construction industry in your country?



Conclusion

Leaders in construction industry

Which manufacturers do you consider to be leaders in the construction industry in your country?

	Total	Germany	United Kingdom	France	Italy	Spain	Netherlands	Belgium	Poland
	n=xxx	n=xxx	n=xxx	n=xxx	n=xxx	n=xxx	n=xxx	n=xxx	n=xxx
xxx	12%	10%	10%	10%	10%	10%	10%	10%	10%
xxx	11%	10%	10%	10%	10%	10%	10%	10%	10%
xxx	10%	10%	10%	10%	10%	10%	10%	10%	10%
xxx	9%	10%	10%	10%	10%	10%	10%	10%	10%
xxx	8%	10%	10%	10%	10%	10%	10%	10%	10%
xxx	7%	10%	10%	10%	10%	10%	10%	10%	10%
xxx	6%	10%	10%	10%	10%	10%	10%	10%	10%
xxx	5%	10%	10%	10%	10%	10%	10%	10%	10%
xxx	4%	10%	10%	10%	10%	10%	10%	10%	10%
xxx	3%	10%	10%	10%	10%	10%	10%	10%	10%
xxx	2%	10%	10%	10%	10%	10%	10%	10%	10%
xxx	2%	10%	10%	10%	10%	10%	10%	10%	10%
xxx	1%	10%	10%	10%	10%	10%	10%	10%	10%

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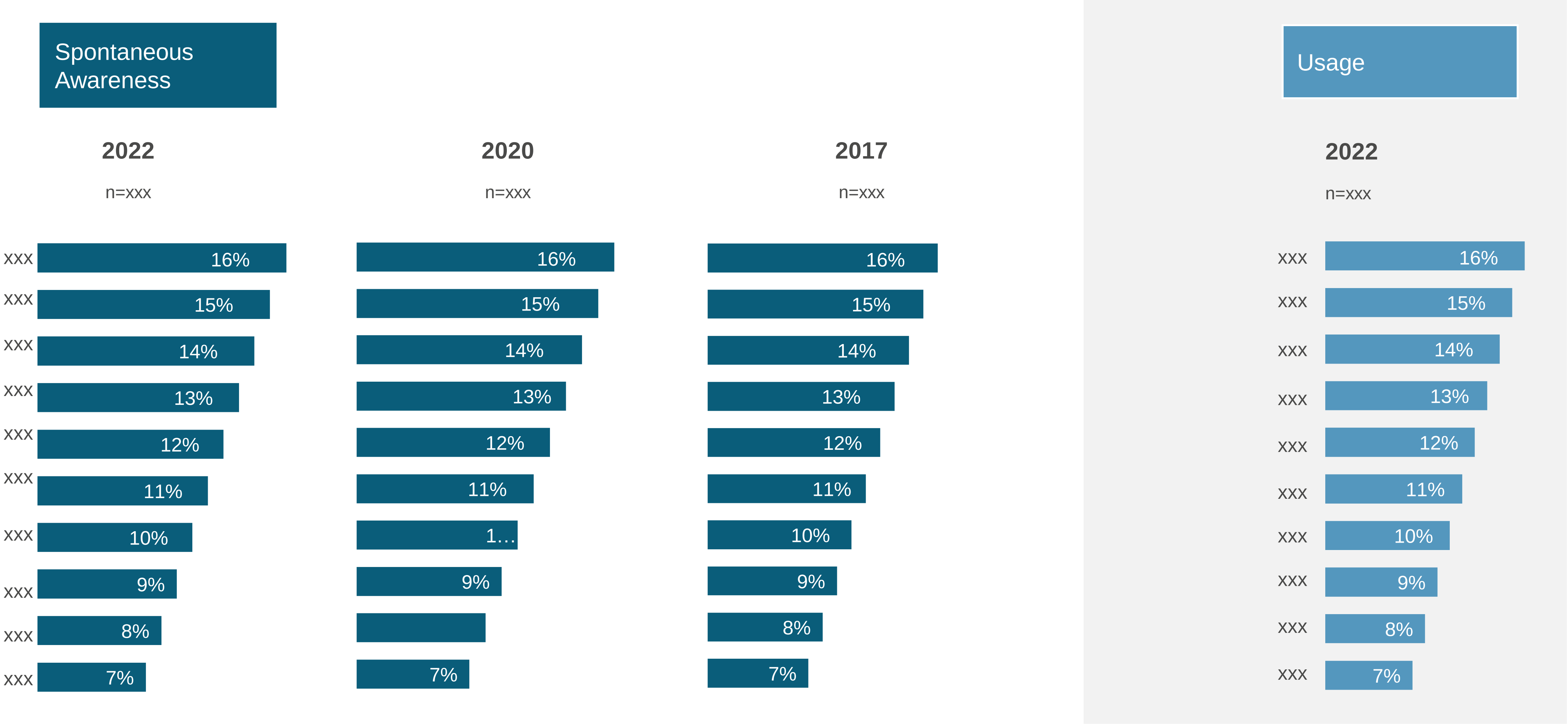
*for each product group the set up is the same

USP

Conclusion

Floor and wall tiles
Spontaneous awareness and usage

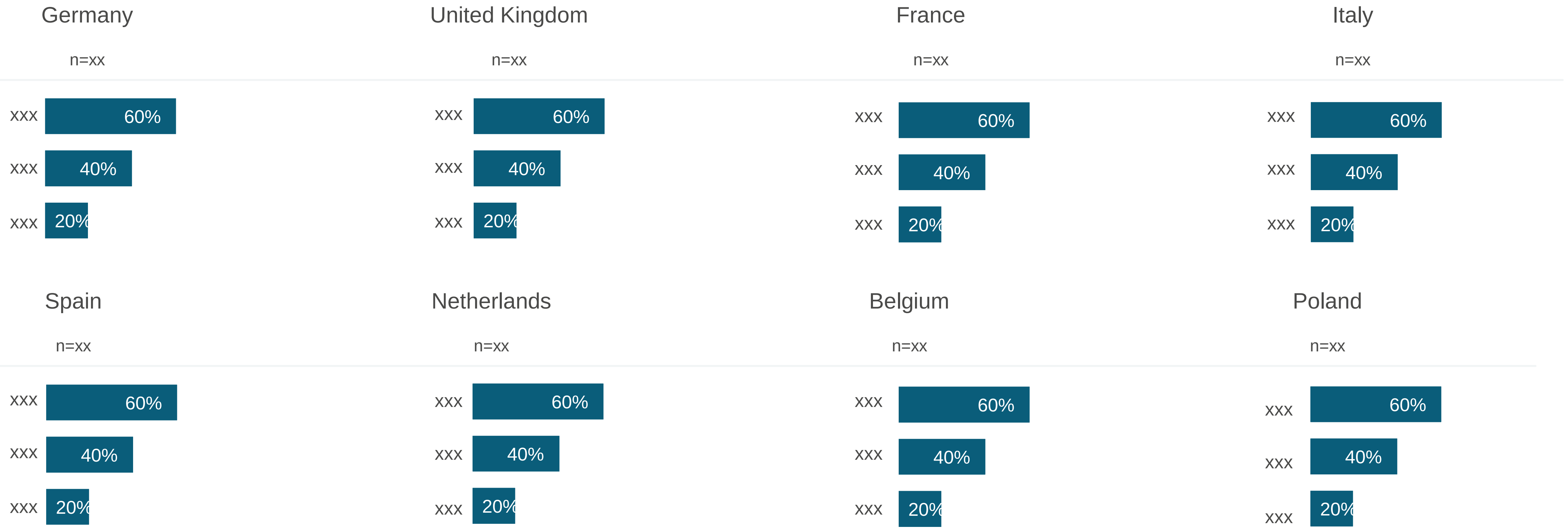


Product groups were randomised for all awareness and usage questions

Conclusion

Floor and wall tiles: spontaneous awareness

Which manufacturers of floor and wall tiles do you know?



2022

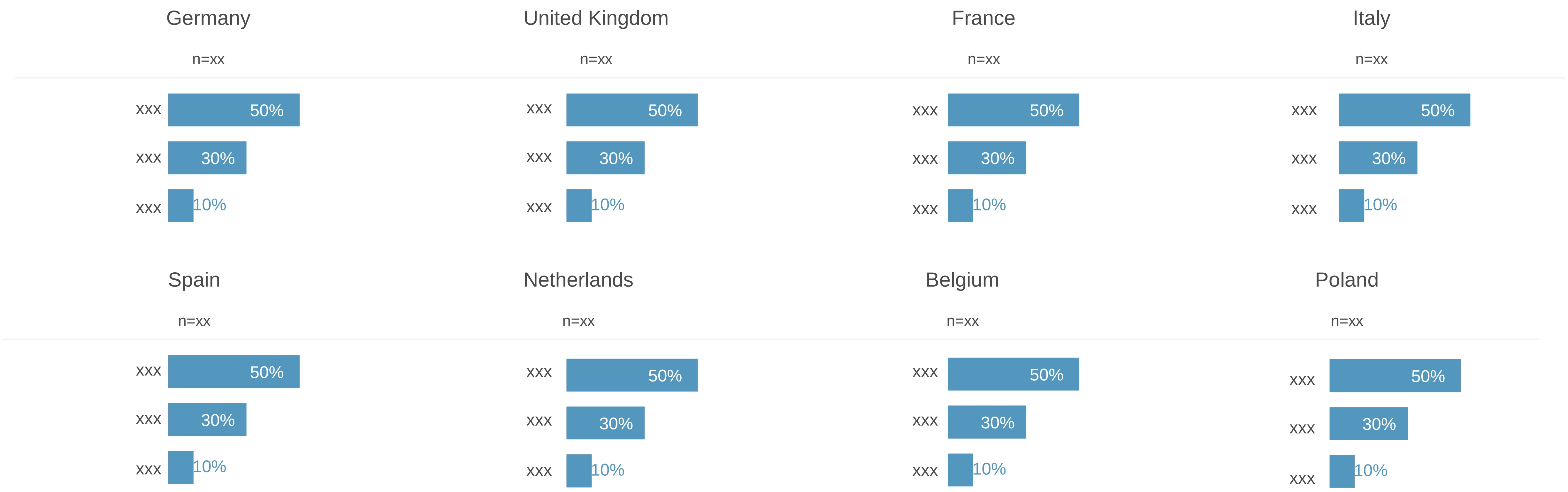
Product groups were randomised for all awareness and usage questions

USP

Conclusion

Floor and wall tiles: usage

Which manufacturers of floor and wall tiles do you most commonly prescribe?



2022

Product groups were randomised for all awareness and usage questions

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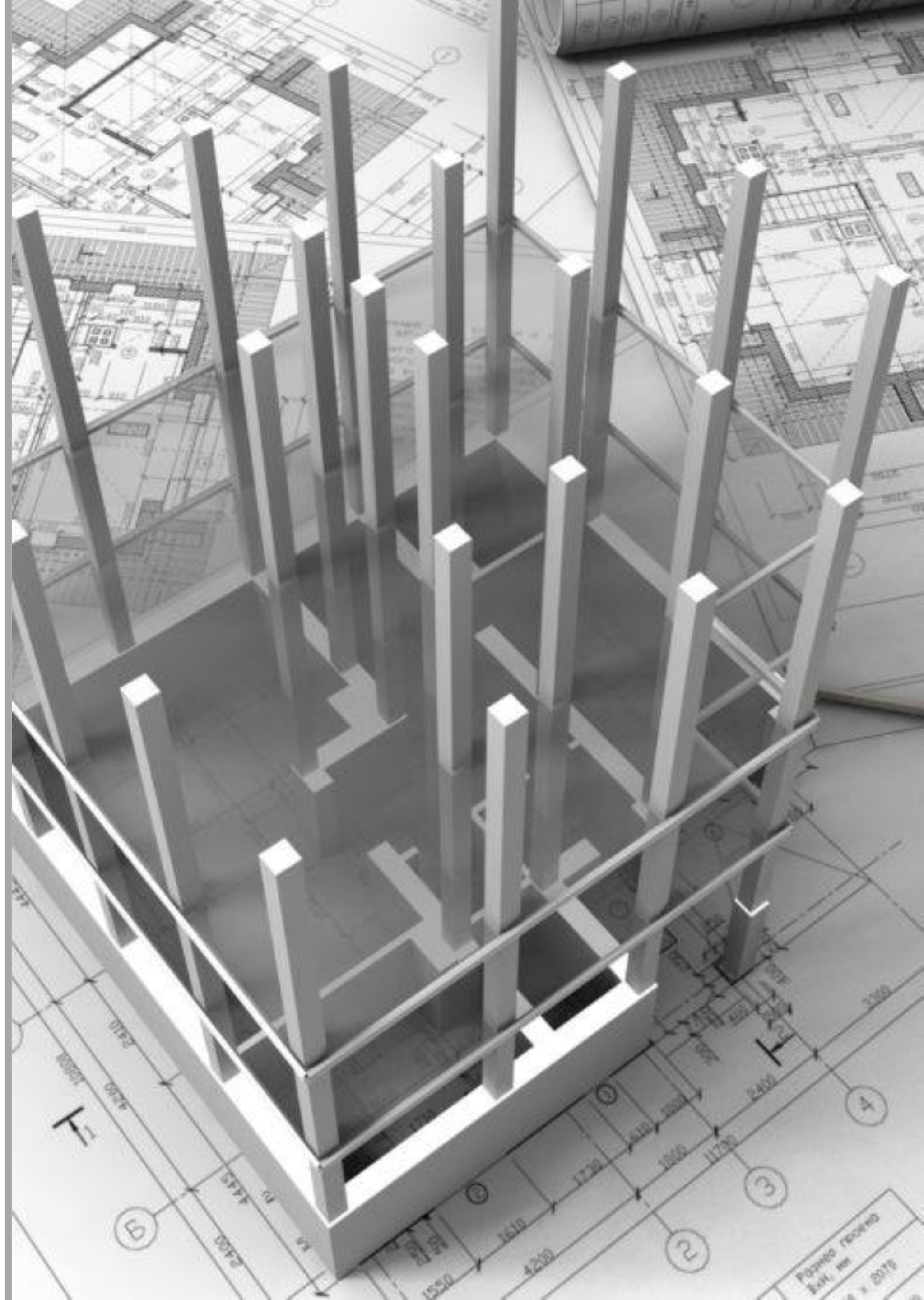


Sample and methodology of the research

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)	1000	1000	1000	1000	1000	1000	1000	1000

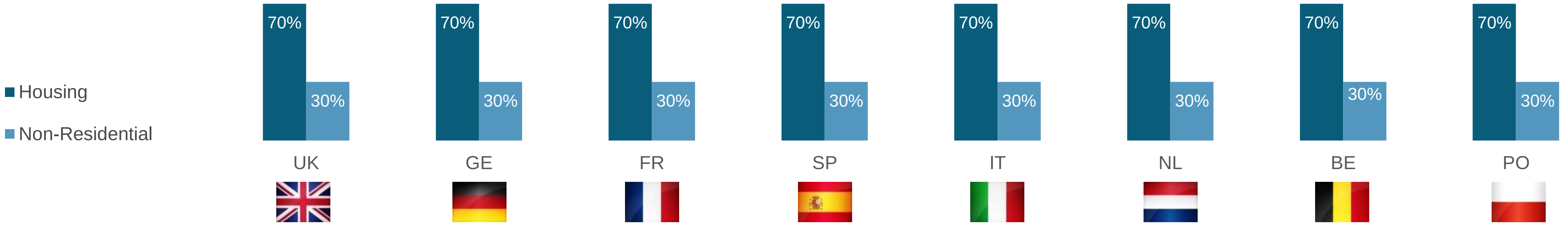
Background of the architects

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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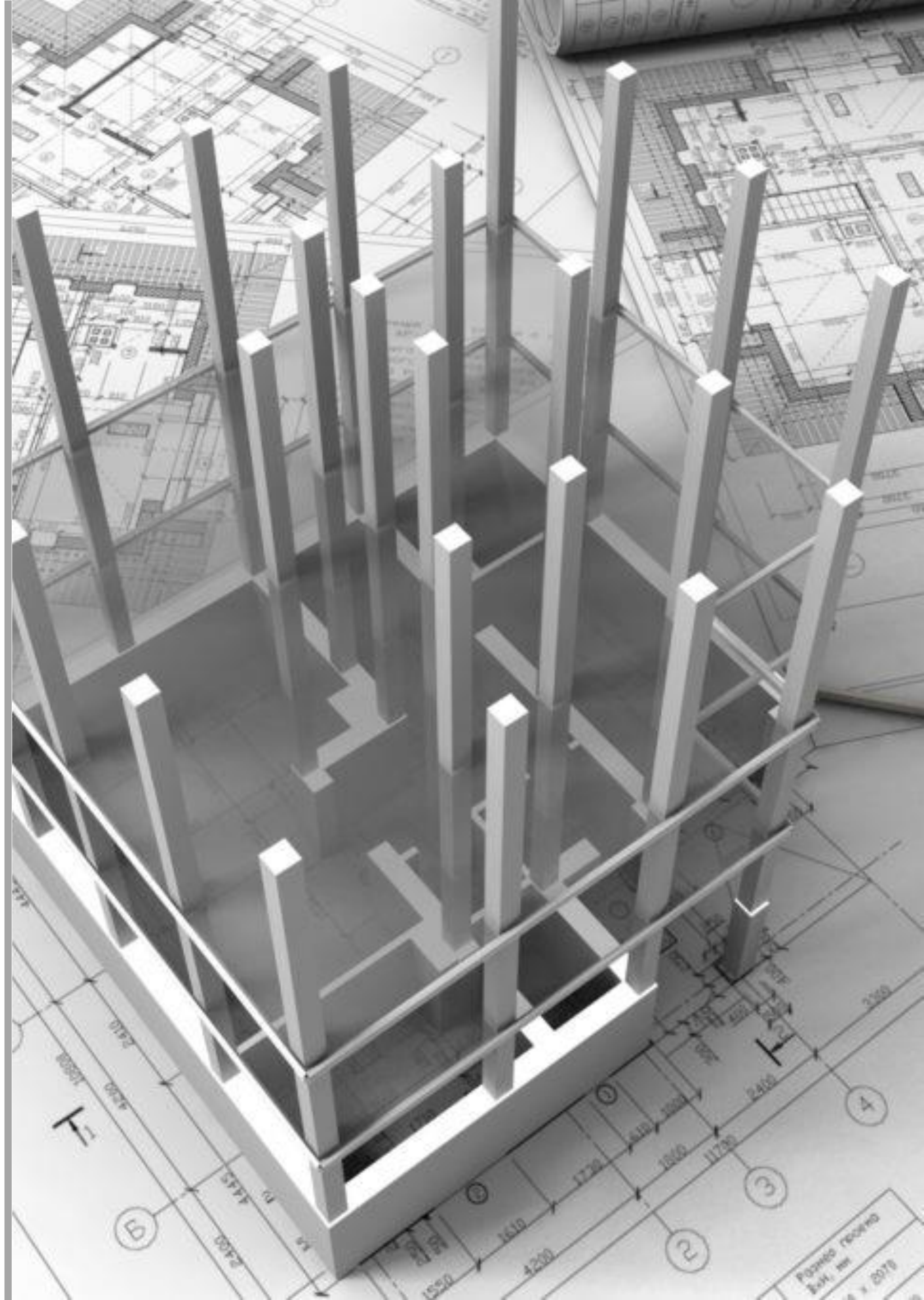
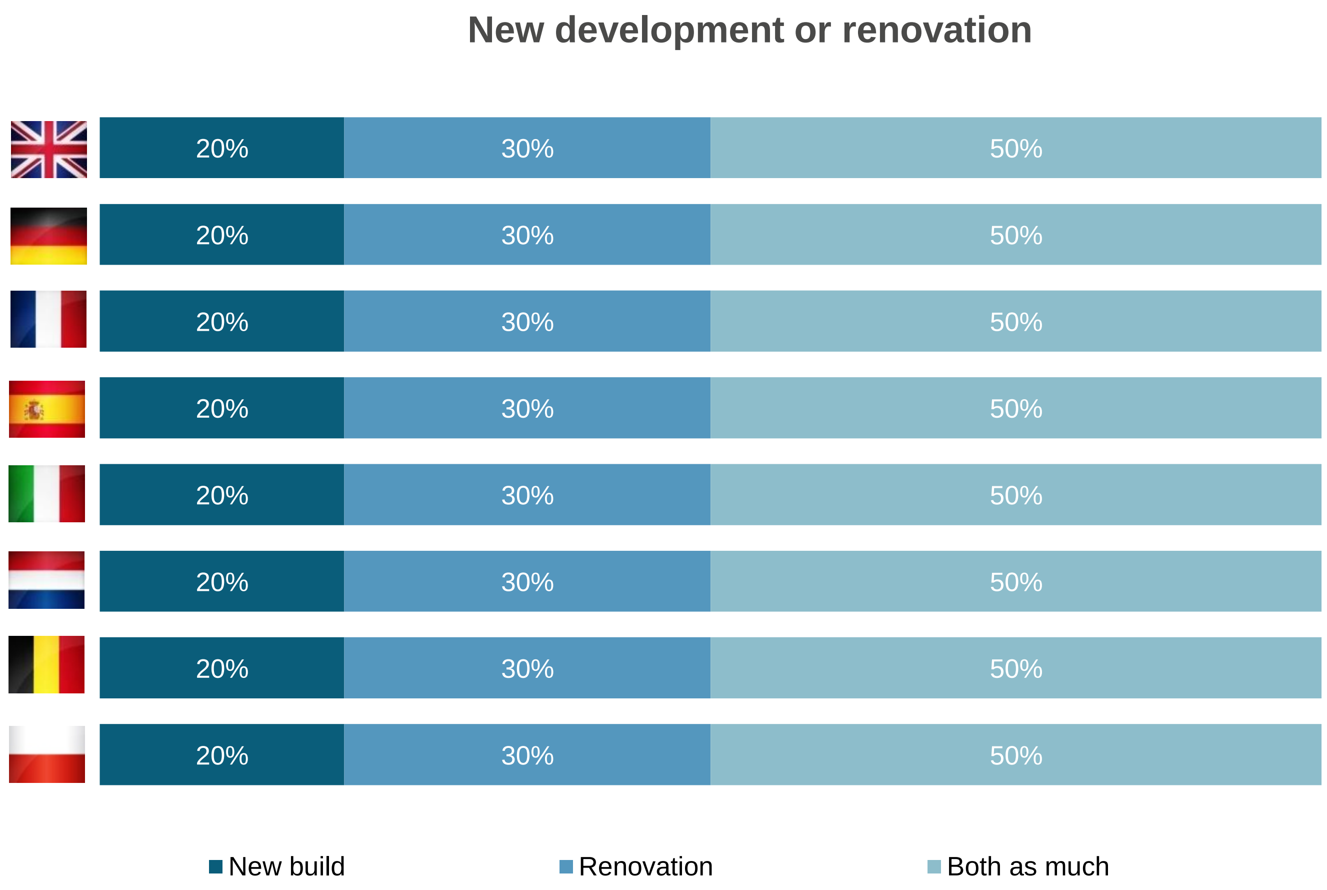


Background of the architects

The figure below shows the split in activities in new build and renovation. Italy has the smallest new build market with merely 12% claiming to be mainly active in new build. You can clearly see that most architects are active in the renovation segment. Almost half of the Polish architects do more new build, which is more than their colleagues from other European countries.



About Arch-Vision

European Architectural Barometer

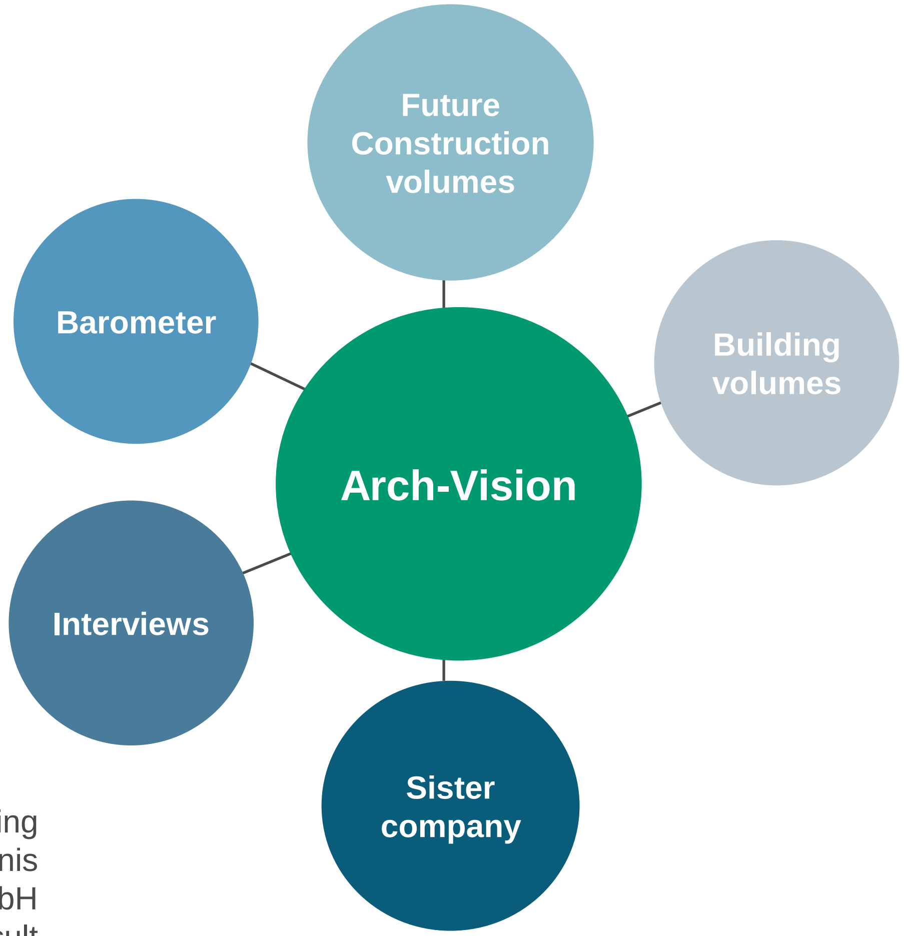
Architects have already been monitored by several institutes in quite diverging ways in the different countries. Arch-Vision launched this European Architectural Barometer for a more cohesive view. The European Architectural Barometer is extremely useful for organisations with a focus on Europe that 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.

Sister company

Arch-Vision is a sister company of USP Marketing Consultancy (www.usp-mc.eu), BouwKennis (www.bouwkennis.nl), BauInfoConsult GmbH (www.bauinfoconsult.de) and BuildInfoConsult (www.buildinfoconsult.com). These are major agencies each providing full-service research support and specialised in the construction and real estate markets.



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.

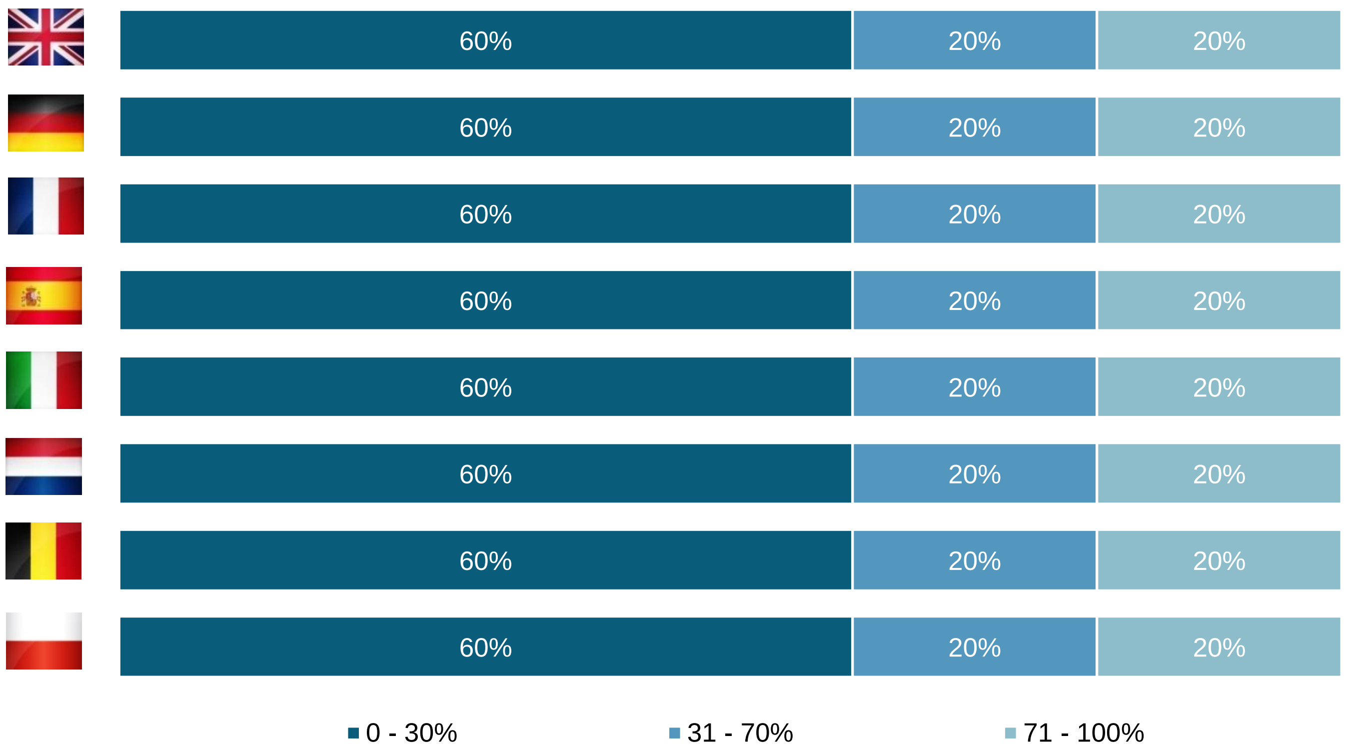
Building volumes

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).

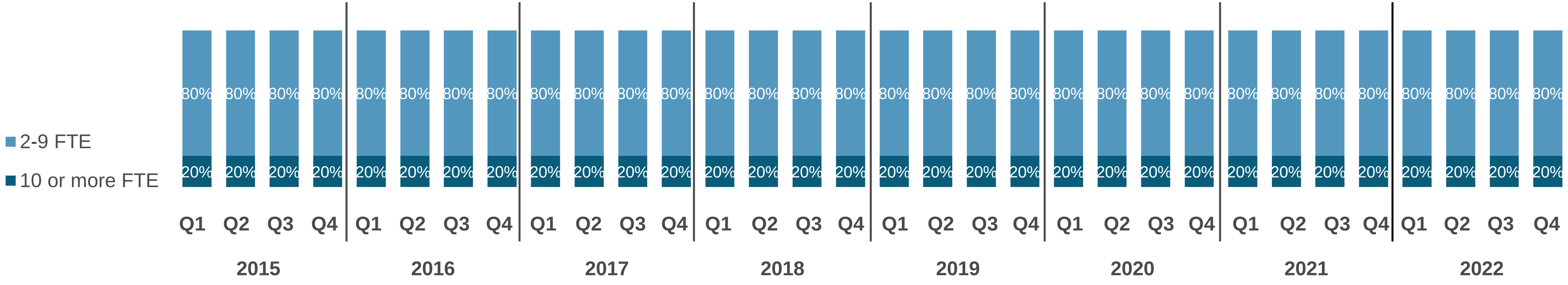
Segment most active

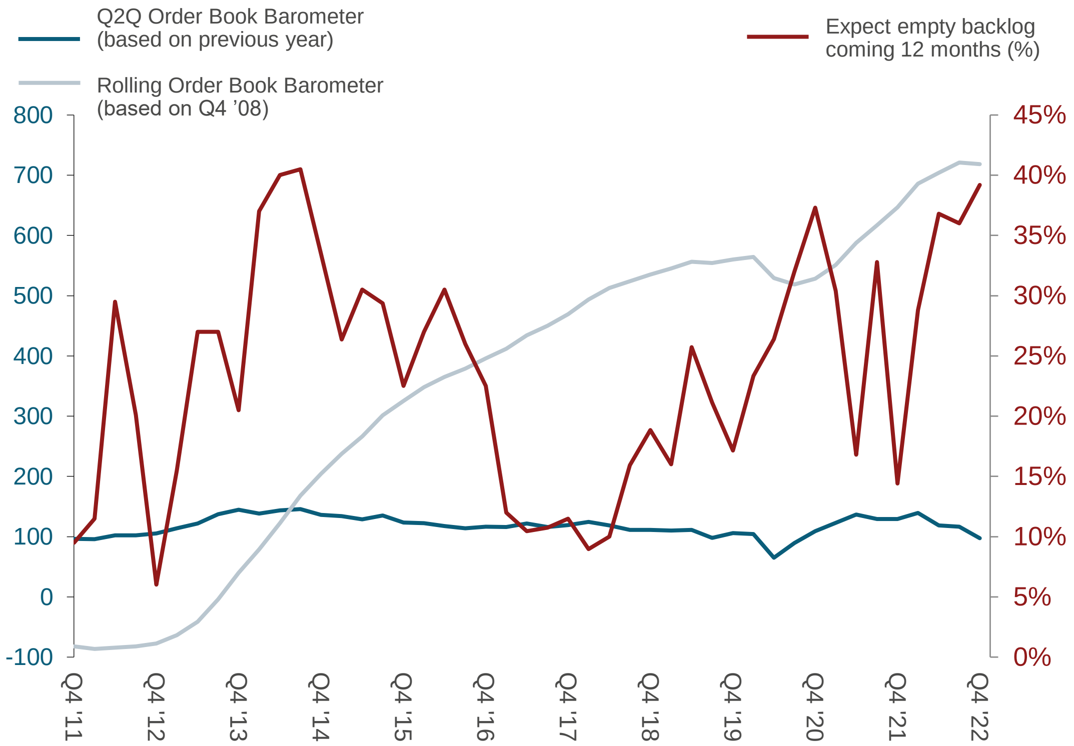


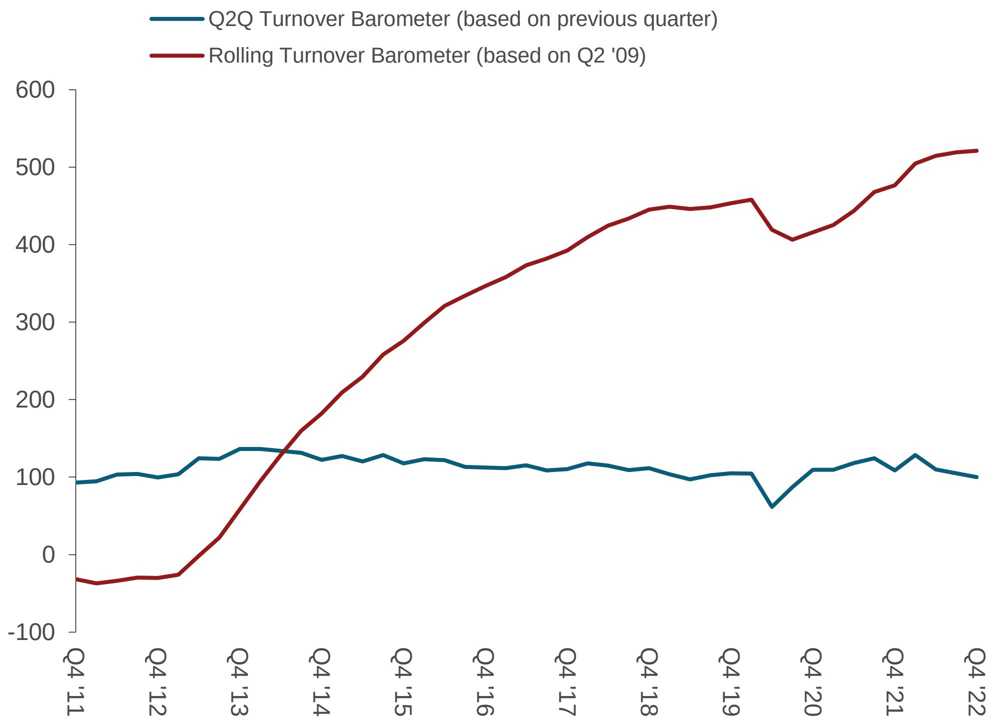
The tables on the following pages show the abovementioned split with regard to the following questions:

- **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







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%
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%
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%
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%
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%
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

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%
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%
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%
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%
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%
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

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	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%	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%	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%	9%	9%

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

Q2Q Saldo = (2500 + 1400 – 150 – 800) / 100 = 30

Q2Q Barometer value = 100 + 30 = **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.

Barometer order book

	Q1'09	Q2'09	Q3'09	Q4'09	Q1'10	Q2'10	Q3'10	Q4 '10	Q1 '11	Q2 '11	Q3 '11	Q4 '11
Q2Q Barometer values	71	75	100	85	100	110	94	94	111	102	94	99
Saldo Q2Q Values	-29	-25	0	-15	0	10	-6	-6	11	2	-6	-1
		+ (-25)	+ (0)	+ (-15)	+ etc.							
Rolling Barometer Values	-29	-54	-54	-69	-69	-59	-65	-71	-60	-59	-65	**-66**

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. Arch-Vision publishes its predictions for the building volumes based on the developments experienced by architects.

The model

Arch-Vision uses a model based on eleven market indicators and Arch-Vision'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 Arch-Vision 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 Arch-Visions' 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 – m^2 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. Which manufacturers do you consider to be leaders in the construction industry in your country?

**For each product group awareness and usage questions were asked:*

2. Which manufacturers of ... (product group) do you know?

3. Which manufacturers of ... (product group) do you most commonly prescribe?

Product groups:

Floor and wall tiles

Insulation materials

Floor covering products

Facade cladding

Bathroom products

Daylight solutions

Lighting systems

Sun cladding

Waterproofing solutions

Paint

Ventilation and indoor climate solution

Ceiling tiles

Masonry products

Smart home systems

About USP

USP Marketing Consultancy

Head office — **Rotterdam**

Subsidiaries — **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

USP

What we do

Examples

Segmentation	**Customer journey**	**Branding**	**Concept/ product research**	**Customer satisfaction**
Trends	**Distribution research**	**Market exploration**	**Pricing**	**Market size**

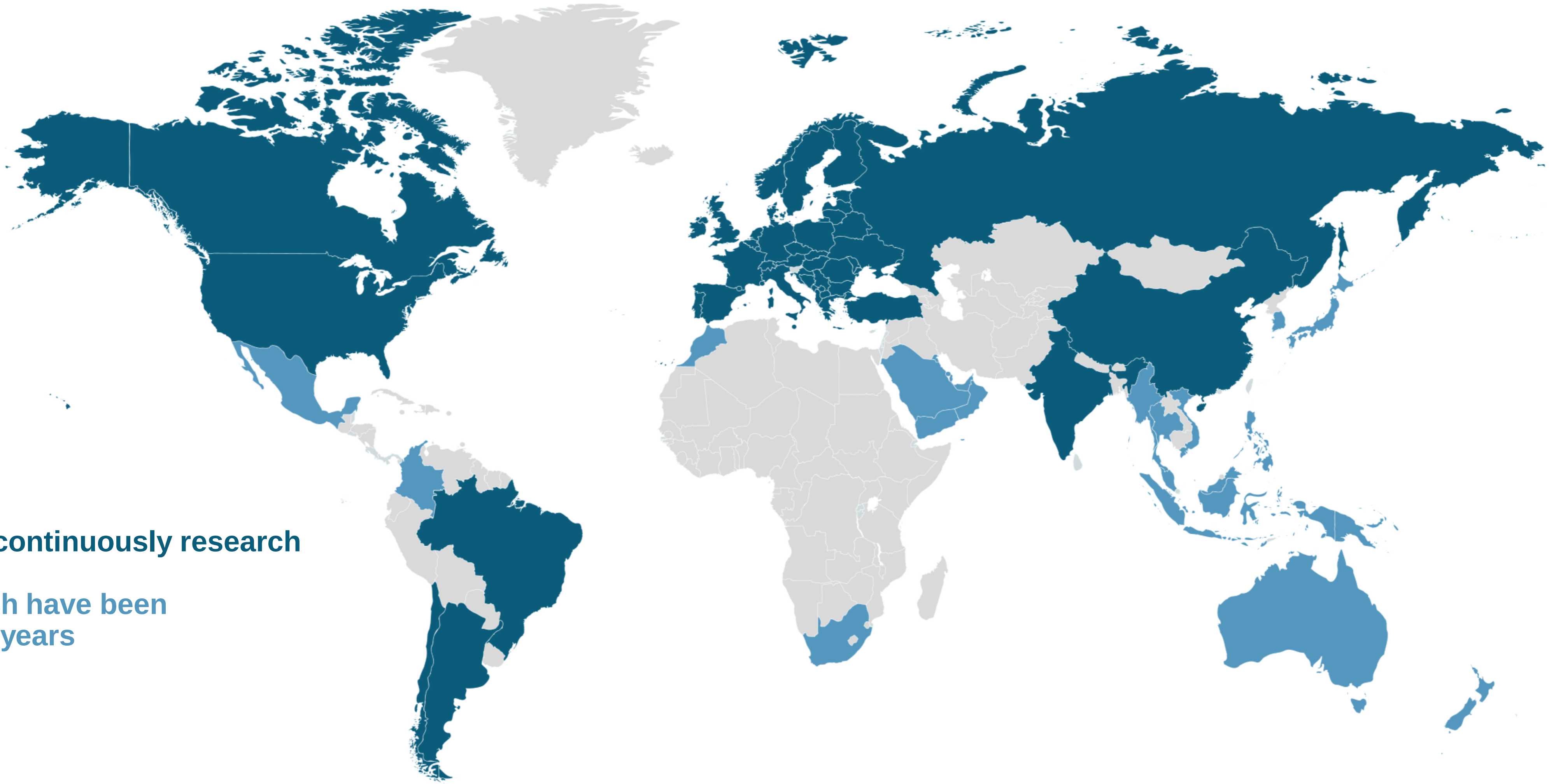
Dedicated market research

- 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 quantitive 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	• Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy	• Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy	• Germany • United Kingdom • France • Netherlands • Belgium • Poland	• Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain	• Germany • United Kingdom • France • Netherlands • Belgium • Poland • Spain • Italy • Denmark • Sweden	• 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	• Q1: Sustainability • Q2: Trends in material usage • Q3: Decision making • Q4: Brand health scan	• H1: Prefabrication • H2: Digitalisation and BIM	• Q1: Digitalisation and BIM • Q2: Prefabrication • Q3: Smart buildings and products • Q4: Media orientation	• Q1: Sustainability • Q2: Smart buildings and products • Q3: Services in the installation market • Q4: Brand health scan	• Trend tracking • Sustainability • Labour shortage • Online buying • Media orientation	• 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	
ASSA ABLOY	AkzoNobel	Wienerberger	HILTI	OBI	adeo	ABB	BOSCH
ArcelorMittal	DAW	3M	SAINT-GOBAIN	ALLEGION	maxeda DIY Group	GRUNDFOS	hager
etex inspiring ways of living	FESTOOL	Villeroy & Boch 1748	DSM	3V3	Ideal Standard	Schneider Electric	LG Life's Good
icopal	Interface	WD-40	fischer innovative solutions	BRIGGS & STRATTON	KOHLER	MITSUBISHI ELECTRIC	Panasonic
KNAUF	Owens Corning	UNILIN for smart living	PPG	Dulux	KÄRCHER	VIESSMANN	Vaillant
ROCKWOOL	sto Building with conscience.	VELUX	stiho	WAGNER	GROHE	signify	ShurTech Brands
Tarkett	TRESPA	tesa	DÖRKEN	Intergamma	Yale	sonepar	TTi

USP Marketing Consultancy