



# European Architectural Barometer Q2 2025

Sustainability – report impression  
August 2025

a product by **USP** Marketing Consultancy

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Background of the research

Economic developments

Sustainability

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# About European Architectural Barometer

## THE GOAL

The objective of the European Architectural Barometer of USP Marketing Consultancy 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 2025:**

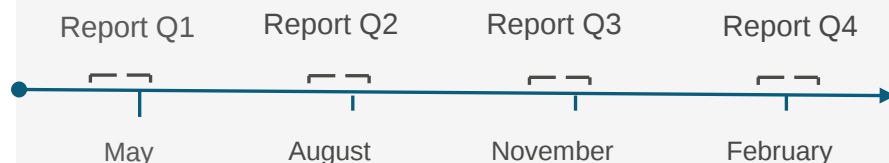
Q1: Media orientation

**Q2: Sustainability**

Q3: Prefab & industrialisation

Q4: BIM & new digital tools

## 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.



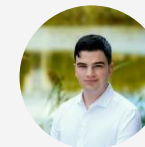
## PROJECT TEAM



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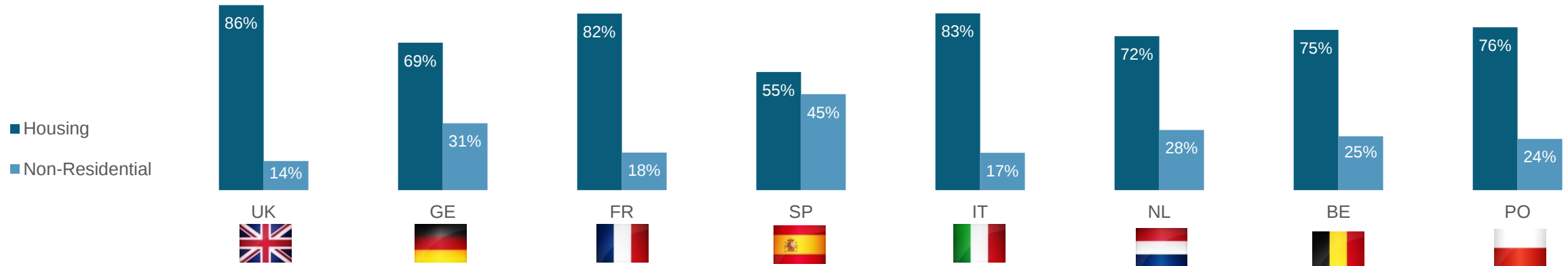
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# Background of the architects

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       | 6.5                                                                                   | 6.9                                                                                   | 4.0                                                                                    | 5.4                                                                                     | 3.7                                                                                     | 8.9                                                                                     | 5.2                                                                                     | 7.5                                                                                     |
| 2 – 4 FTE     |  53% |  46% |  81% |  51% |  78% |  44% |  62% |  54% |
| 5 – 9 FTE     |  33% |  30% |  12%  |  40% |  17% |  16% |  16% |  22% |
| 10 – 19 FTE   |  7%  |  18% |  3%   |  7%  |  3%  |  17% |  11% |  17% |
| 20 – 39 FTE   |  6%  |  6%  |  2%   |  1%  |  2%  |  9%  |  6%  |  5%  |
| > 40 FTE      |  1%  | 0%                                                                                    |  1%   |  1%  | 0%                                                                                      |  3%  | 0%                                                                                      |  2%  |

## Segment mostly active



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# Research questions **Economic development**

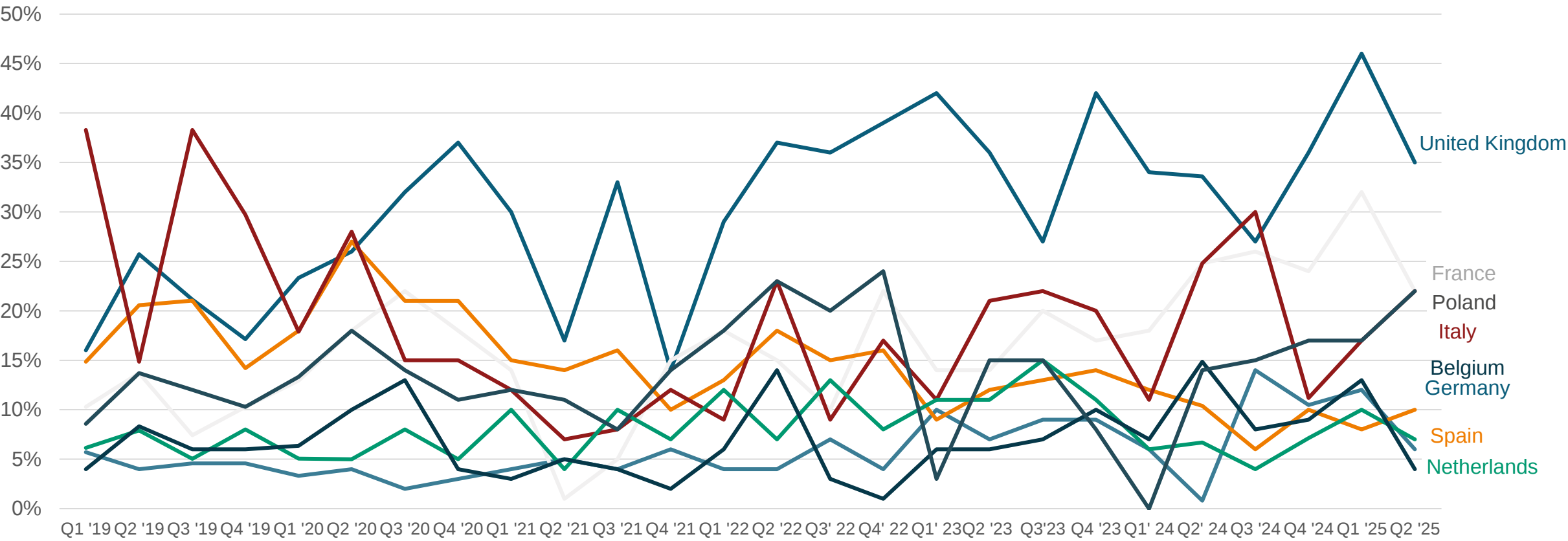
These questions are asked every measurement

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 2023?
5. How many employees in FTE did your company have at the end of 2022?
6. How many employees in FTE did your company have at the end of 2021?
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?

There is strong increase in the share of architects in UK and France that expect an empty order book in the coming 12 months.

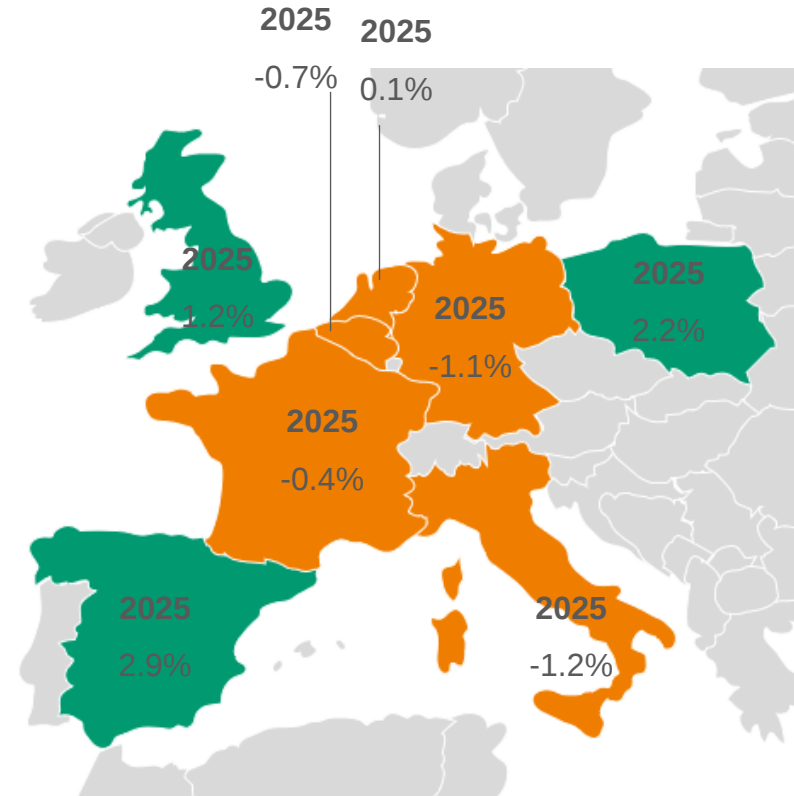
% of architects expecting empty order book in the coming 12 months

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



# Construction volumes 2025 European overview

- The developments in 2025...



• See the country slides for more detailed information on the developments per construction segment.

# Index

Economic developments

Italy

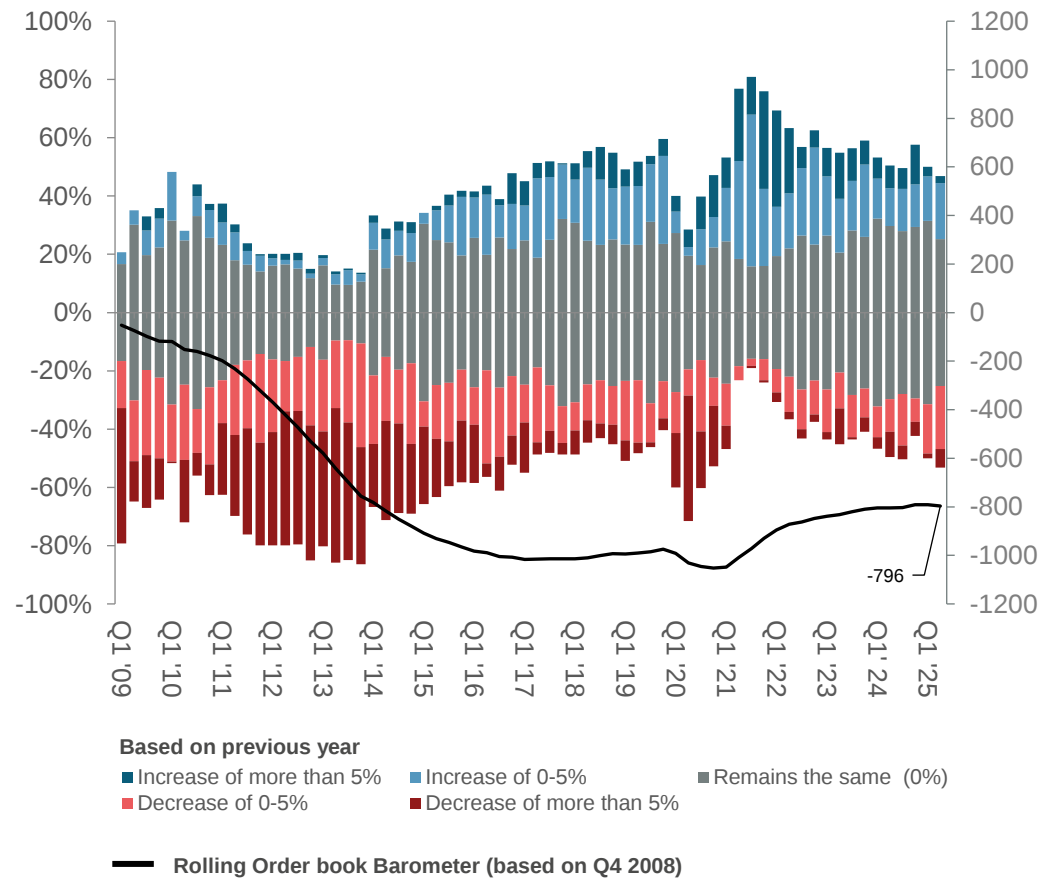
Sustainability

Research Background and Appendix

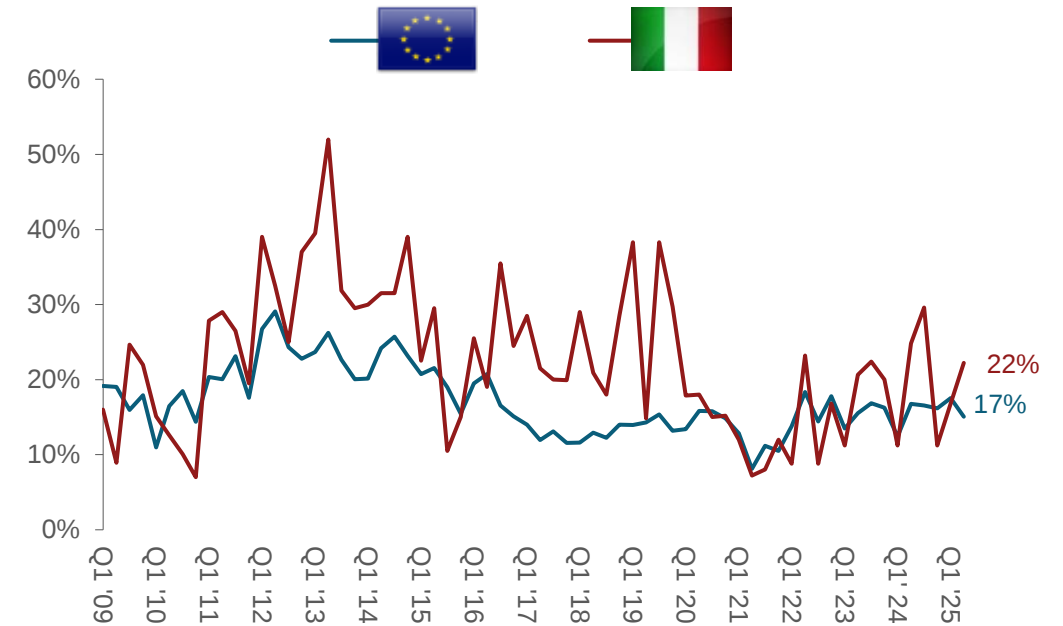


After stable developments, Q2 results show slightly more Italian architects experiencing decreasing order books.

Development of order book

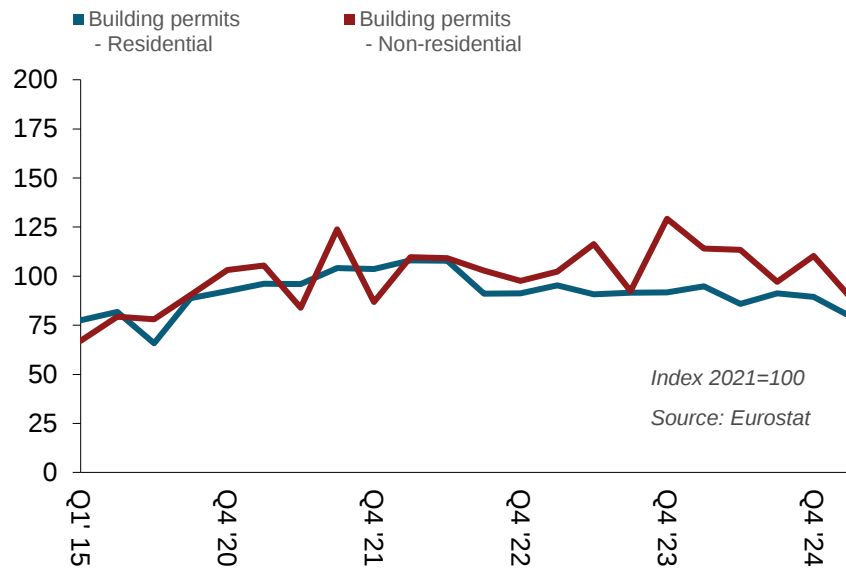


Expecting empty order book in 12 months



Italian indicators show a mixed image, but building permit development declined again.

### Development building permits



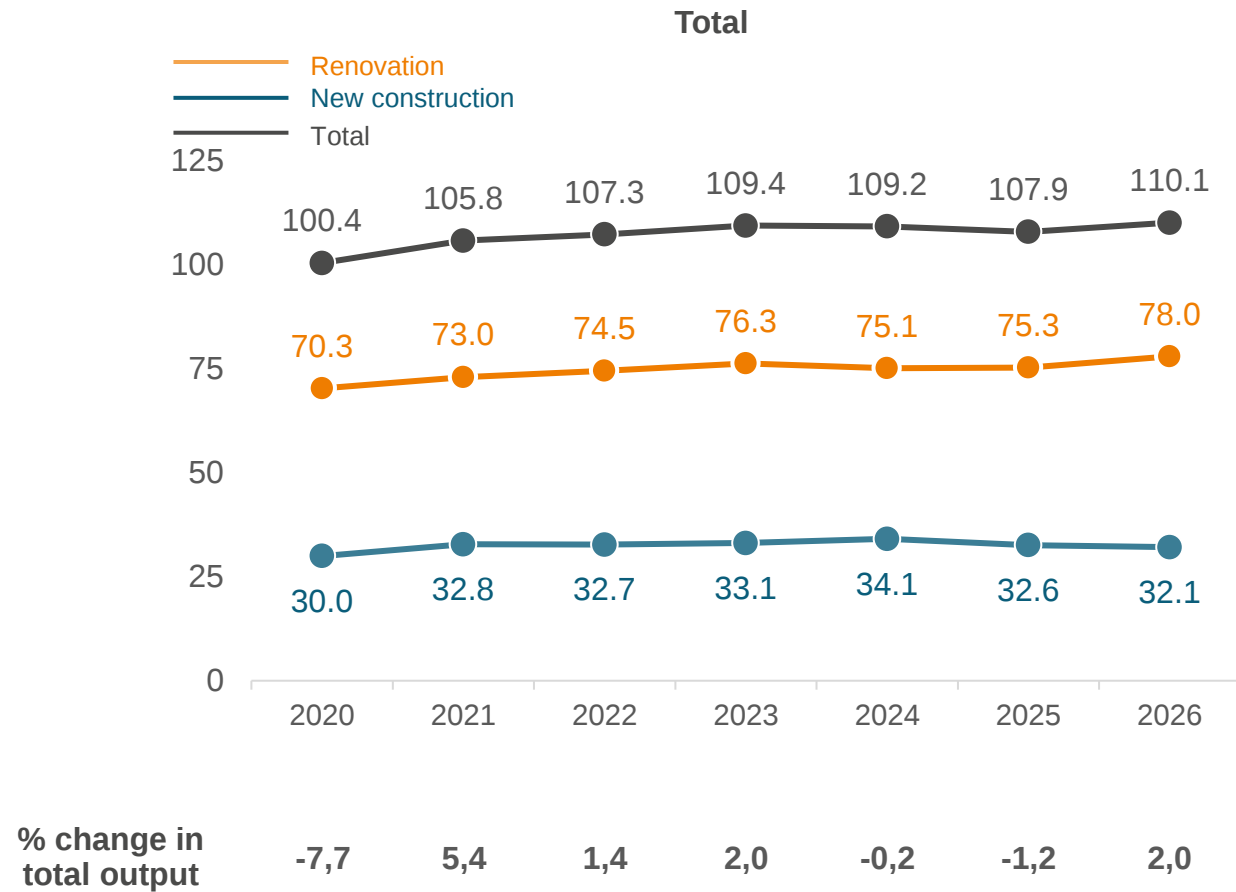
| Economic and construction related indicators        | Value Q2 2024 | Value Q1 2025 | Value Q2 2025 | Q-2-Q development |
|-----------------------------------------------------|---------------|---------------|---------------|-------------------|
| GDP (quarterly growth rate) (%)*                    | 0.2           | 0.0           | 0.3           | Positive          |
| Consumer confidence indicator**                     | -18.3         | -15.1         | -17.6         | Negative          |
| Industrial confidence indicator**                   | -7.0          | -8.3          | -8.2          | Neutral           |
| Construction confidence indicator**                 | 2.9           | 2.3           | 2.7           | Positive          |
| Production value buildings (index 2021=100)**       | 137.7         | 140.5         | 142.8         | Positive          |
| Architects with postponed projects (%)***           | 48            | 26            | 35            | Negative          |
| Architects with cancelled projects (%)***           | 30            | 10            | 18            | Negative          |
| Building permits residential (index 2021=100)**     | 85.8          | 79.6          | n/a           |                   |
| Building permits non-residential (index 2021=100)** | 113.4         | 89.1          | n/a           |                   |

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.

# Forecast of building volumes in billion euros

(% change year over year)



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Key insights and recommendations

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Appendix



# Questionnaire – Theme questions

## Sustainability

1. What describes sustainable construction best according to you?
2. To what extent do your clients ask for sustainability, and are they willing to invest more in it?
3. How much more are clients willing to invest when presented with sustainable products or solutions?
4. What would be approximately the share of your projects where sustainability is taken into account?
5. To what extent do you see the following as a problem for the transition to a sustainable construction sector?
6. What actions do you take as a company to create a more sustainable building project?
7. Are you familiar with the terms ...?
8. Does your organization make use of /consider...?
  - Material passport
  - EPD (Environmental Product Declaration)
  - Urban mining
  - C2C certified products (C2C = Cradle to Cradle)
  - Refurbished building components
  - Embodied carbon footprint
9. When selecting materials or products for a building project, how often is sustainability a deciding factor?
10. How important are the following aspects in your own construction projects when it comes to sustainability and circularity?
11. Which types of digital tools do you use when making sustainability-related product or material decisions?
12. In your opinion, which sustainability aspects will become significantly more important in architectural design over the next 5 years?

# Key insights



Insight 1



Insight 2



Insight 3

# Key insights

**4** Insight 4

**5** Insight 5

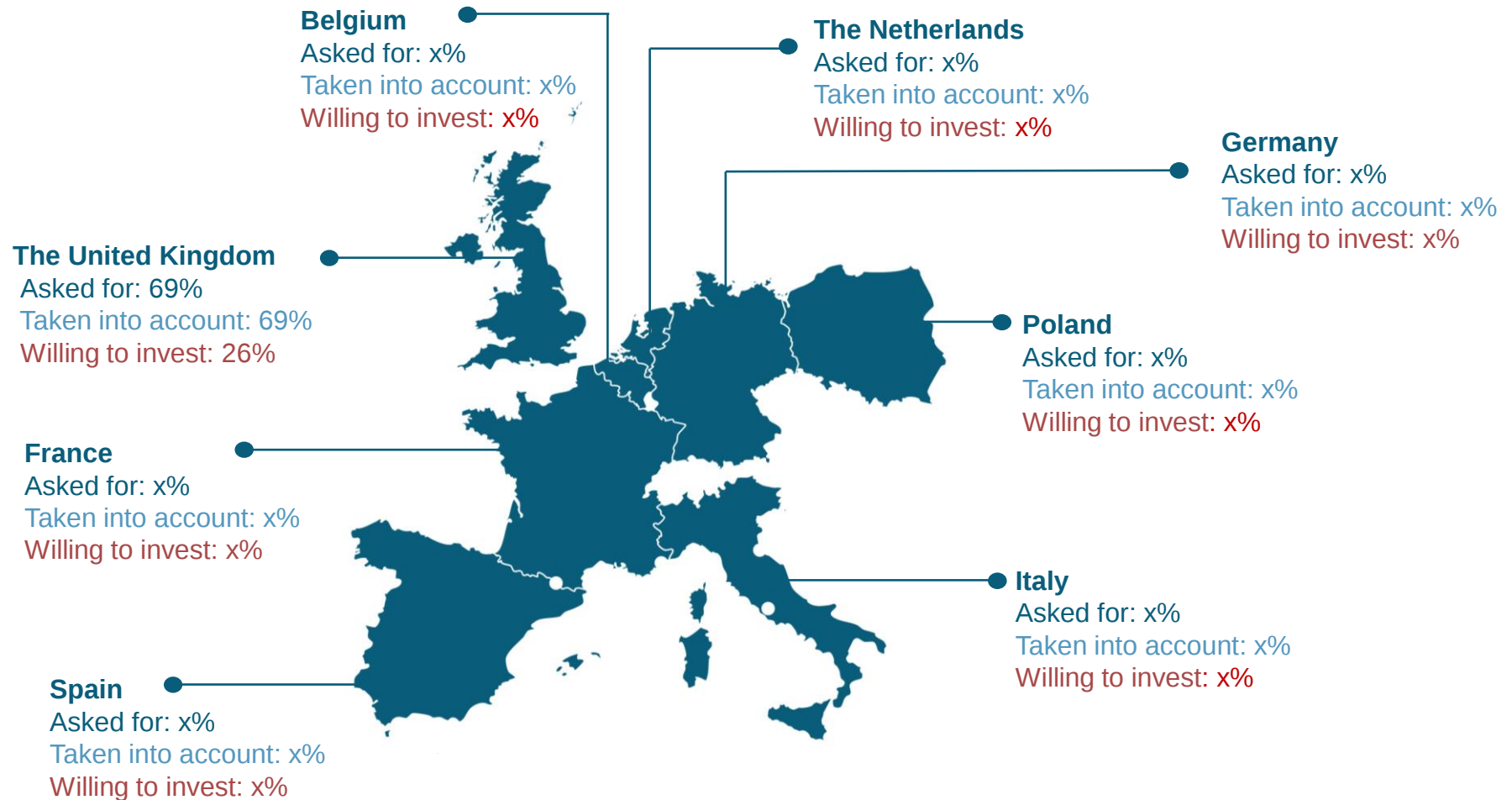
**6** Insight 6

# Sustainability is generally highly sought after...

Overview of views towards sustainability per country

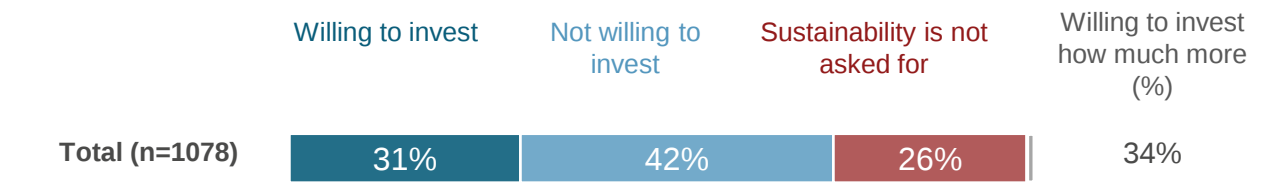
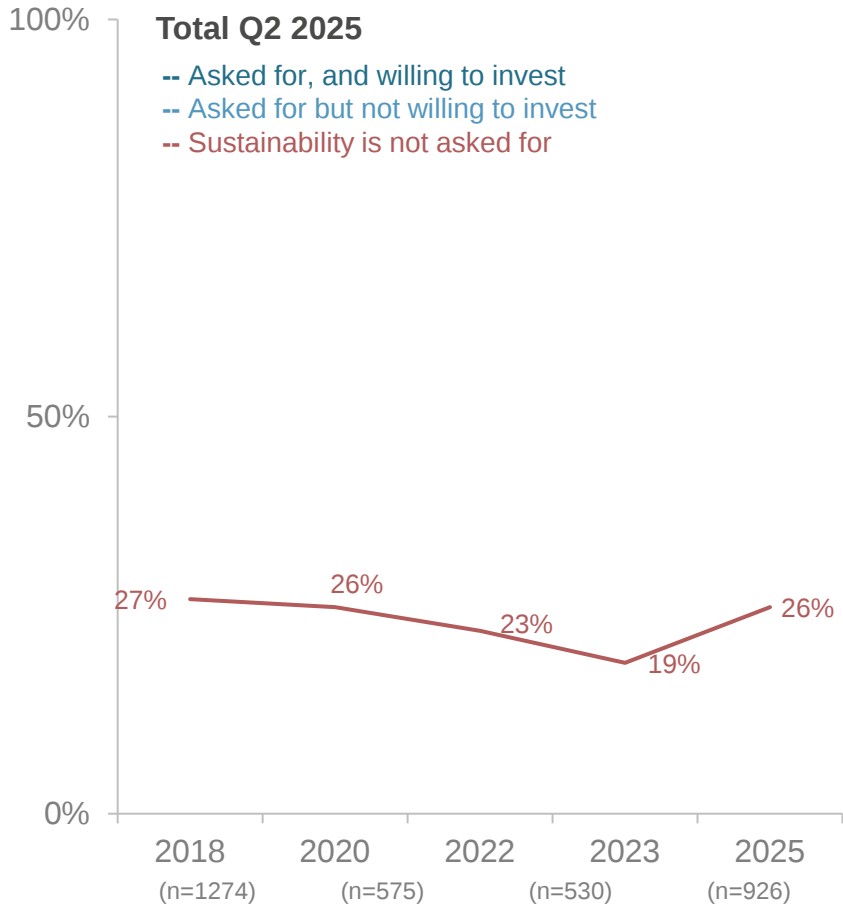
*To what extent do your clients ask for sustainability, and are they willing to invest more in it?*

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



# There is no stark increase on the European level in willingness to invest in sustainable solutions. The Netherlands is the leader.

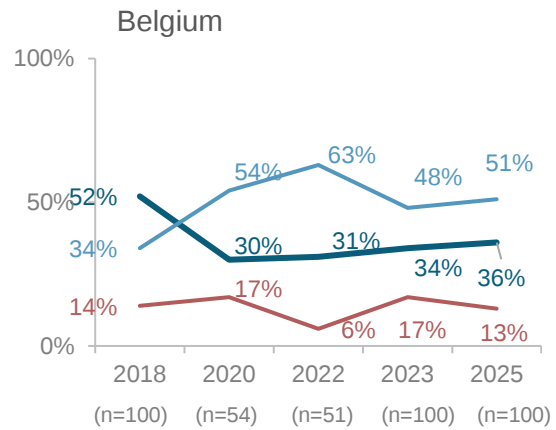
Willingness to invest in sustainability  
 To what extent do your clients ask for sustainability and are they willing to invest more in it?  
 How much more are clients willing to invest when presented with sustainable products or solutions%?



## Willingness to invest in sustainability - trend

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

- Asked for, and willing to invest
- Asked for but not willing to invest
- Sustainability is not asked for



# European architects are generally ...

## Perception of sustainable construction

*What describes sustainable construction best according to you?*

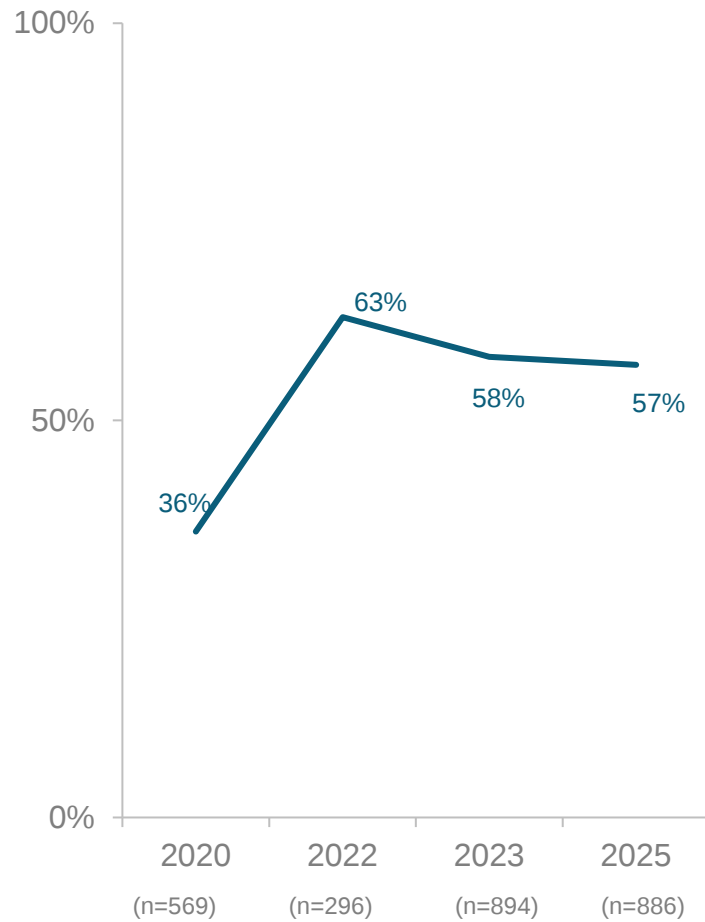
|                                                    | Total Q2 2025 | Total Q2 2023 | Belgium | France | Germany | Italy | Netherlands | Poland | Spain | United Kingdom |
|----------------------------------------------------|---------------|---------------|---------|--------|---------|-------|-------------|--------|-------|----------------|
|                                                    | n=463         | n=941         | n=50    | n=62   | n=62    | n=63  | n=51        | n=50   | n=62  | n=63           |
| Energy and resource efficient buildings            | 30%           | 37%           | x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
| Environmentally friendly materials or products     |               |               | x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
| Renewable materials                                |               |               | x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
| Long-lasting materials or products                 |               |               | x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
| Recyclable materials                               |               |               | x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
| Low impact on ecosystem                            |               |               | x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
| Environmentally friendly production or fabrication |               |               | x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
| Circularity                                        |               |               | x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
| Materials or products with certificates            |               |               | x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
| Materials with recycled content                    |               |               | x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |

\*No data available

# Sustainability in projects has ...

Share of projects where sustainability is taken into account

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



# Sustainability strategies are ...

## Creating sustainable building project

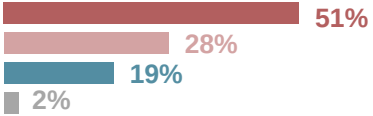
*What actions do you take as a company to create a sustainable building project? – Top 10*

|                                               | Total 2025 | Belgium | France | Germany | Italy | Netherlands | Poland | Spain | United Kingdom |
|-----------------------------------------------|------------|---------|--------|---------|-------|-------------|--------|-------|----------------|
|                                               | n=460      | n=50    | n=60   | n=63    | n=63  | n=49        | n=50   | n=63  | n=62           |
| Use natural and renewable materials           | 41%        | x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
| Use renewable energy sources                  |            | x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
| Use recyclable materials                      |            | x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
| Other                                         |            | x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
| Use building parts that are easy to dismantle |            | x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
| Awareness and education                       |            | x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
| Separate/ minimise waste                      |            | x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
| Work with local suppliers                     |            | x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
| Don't know/no opinion                         |            | x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
| Regulations and Compliance                    |            | x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |

# The transition to a sustainable construction sector is held back primarily by the high costs of sustainable alternatives and regulations that restrict rather than incentivize progress.

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?

|                                                                                  | Total 2025<br>n=926                                                                                                                                            | Belgium<br>n=100 | France<br>n=125 | Germany<br>n=125 | Italy<br>n=126 | Netherlands<br>n=100 | Poland<br>n=100 | Spain<br>n=125 | United Kingdom<br>n=125 |
|----------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|-----------------|------------------|----------------|----------------------|-----------------|----------------|-------------------------|
| Legislation and regulations that inhibit but do not stimulate                    | <br>51% (Big problem), 28% (Small problem), 19% (No problem), 2% (Don't know) | x%               | x%              | x%               | x%             | x%                   | x%              | x%             | x%                      |
| Insufficient knowledge and awareness                                             |                                                                                                                                                                | x%               | x%              | x%               | x%             | x%                   | x%              | x%             | x%                      |
| The lack of a uniform yardstick for measuring sustainability and/ or circularity |                                                                                                                                                                | x%               | x%              | x%               | x%             | x%                   | x%              | x%             | x%                      |
| Insufficient demand in the market                                                |                                                                                                                                                                | x%               | x%              | x%               | x%             | x%                   | x%              | x%             | x%                      |
| Insufficient supply in the market                                                |                                                                                                                                                                | x%               | x%              | x%               | x%             | x%                   | x%              | x%             | x%                      |
| High costs of sustainable alternatives                                           |                                                                                                                                                                | x%               | x%              | x%               | x%             | x%                   | x%              | x%             | x%                      |

## C2C certified products (C2C = Cradle to Cradle)

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

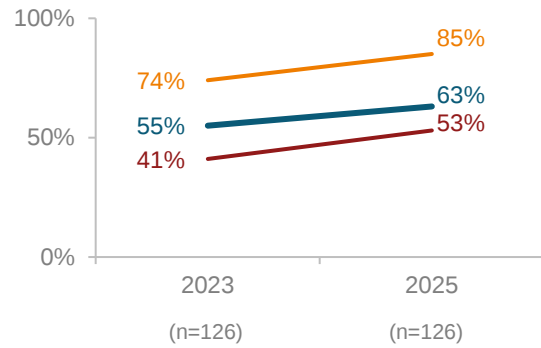


| Belgium | France | Germany | Italy | Netherlands | Poland | Spain | United Kingdom |
|---------|--------|---------|-------|-------------|--------|-------|----------------|
| n=100   | n=125  | n=125   | n=126 | n=100       | n=100  | n=125 | n=125          |
| x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
| n=76    | n=83   | n=65    | n=79  | n=79        | n=43   | n=58  | n=81           |
| x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
| x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |

# Most countries...

C2C certified products (C2C = Cradle to Cradle)

Italy

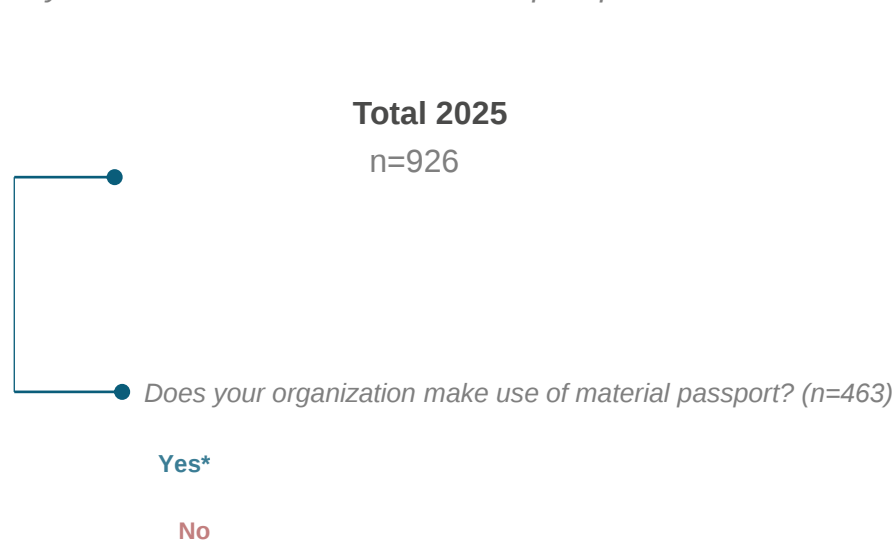


- Familiar
- Usage (based on those who are familiar)
- Usage (based on total population)

Material passports are still in an early adoption phase, with less than half of the market familiar with the concept and a majority not yet applying it in practice.

## Material passport

*Are you familiar with the term material passport?*



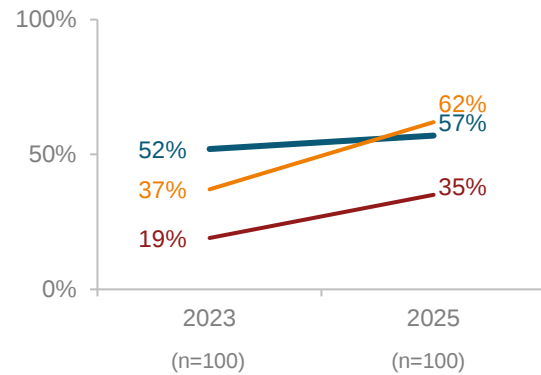
|  | Belgium | France | Germany | Italy | Netherlands | Poland | Spain | United Kingdom |
|--|---------|--------|---------|-------|-------------|--------|-------|----------------|
|  | n=100   | n=125  | n=125   | n=126 | n=100       | n=100  | n=125 | n=125          |
|  | x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
|  | n=57    | n=30   | n=68    | n=63  | n=84        | n=47   | n=47  | n=67           |
|  | x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
|  | x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |

# Material passport usage is ...

## Material Passport

- Familiar
- Usage (based on those who are familiar)
- Usage (based on total population)

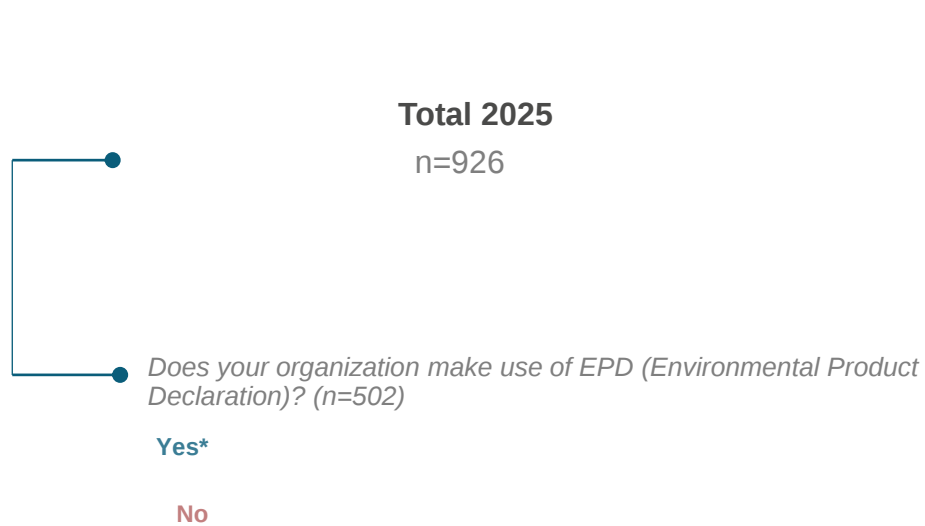
### Belgium



# EPDs are ...

EPD (Environmental Product Declaration)

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

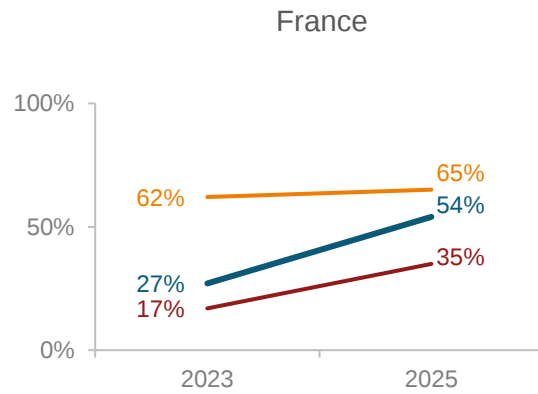


| Belgium | France | Germany | Italy | Netherlands | Poland | Spain | United Kingdom |
|---------|--------|---------|-------|-------------|--------|-------|----------------|
| n=100   | n=125  | n=125   | n=126 | n=100       | n=100  | n=125 | n=125          |
| x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
| n=54    | n=68   | n=51    | n=98  | n=40        | n=62   | n=55  | n=73           |
| x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
| x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |

# Across markets...

EPD (Environmental Product Declaration)

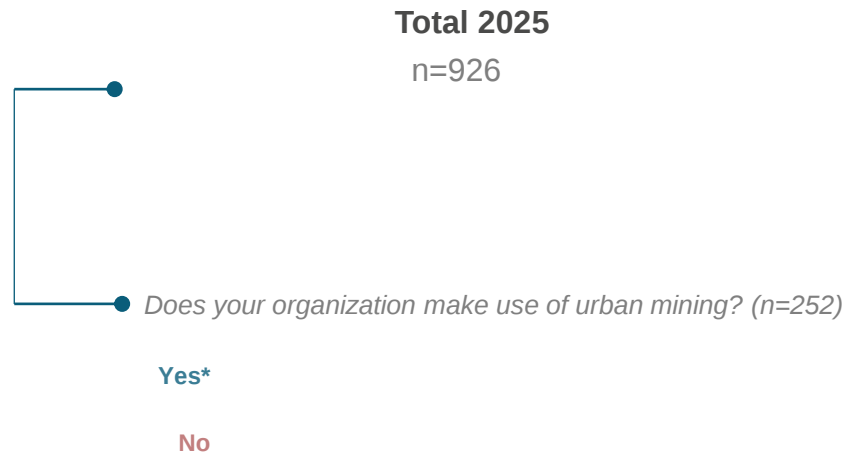
- Familiar
- Usage (based on those who are familiar)
- Usage (based on total population)



# Urban mining remains ...

## Urban mining

*Are you familiar with the term urban mining?*



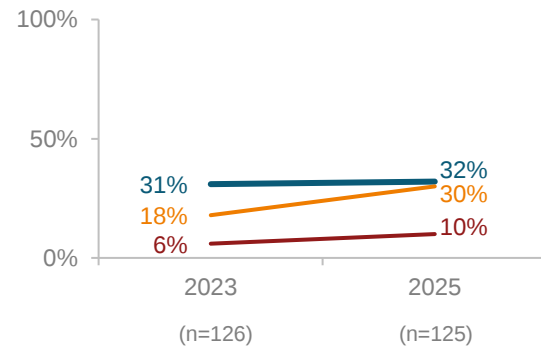
| Belgium | France | Germany | Italy | Netherlands | Poland | Spain | United Kingdom |
|---------|--------|---------|-------|-------------|--------|-------|----------------|
| n=100   | n=125  | n=125   | n=126 | n=100       | n=100  | n=125 | n=125          |
| x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
| n=36    | n=35   | n=40    | n=21  | n=49        | n=13   | n=29  | n=30           |
| x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
| x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |

# Urban mining remains ...

## Urban mining

- Familiar
- Usage (based on those who are familiar)
- Usage (based on total population)

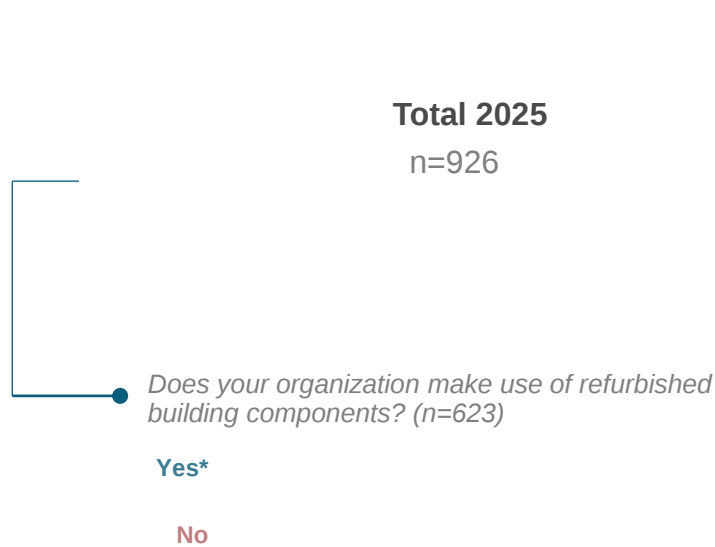
### Germany



Refurbished building components stand out as one of the most established sustainability practices, with strong awareness across Europe and very high usage where known.

## Refurbished building components

*Are you familiar with the term refurbished building components?*

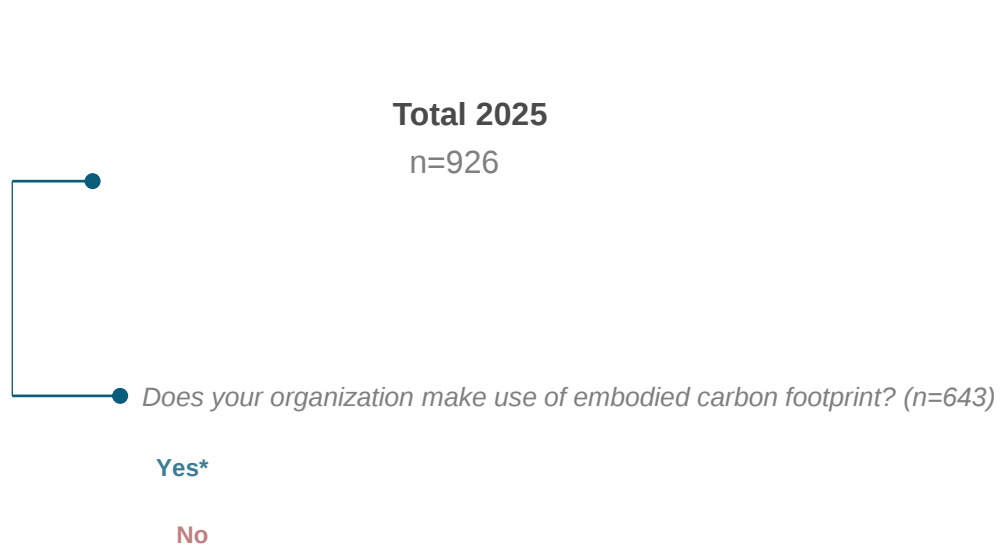


| Belgium | France | Germany | Italy | Netherlands | Poland | Spain | United Kingdom |
|---------|--------|---------|-------|-------------|--------|-------|----------------|
| n=100   | n=125  | n=125   | n=126 | n=100       | n=100  | n=125 | n=125          |
| x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
| n=67    | n=103  | n=56    | n=116 | n=66        | n=74   | n=60  | n=81           |
| x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
| x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |

# Embodied carbon footprinting is ...

## Embodied carbon footprint

Are you familiar with the term embodied carbon footprint?

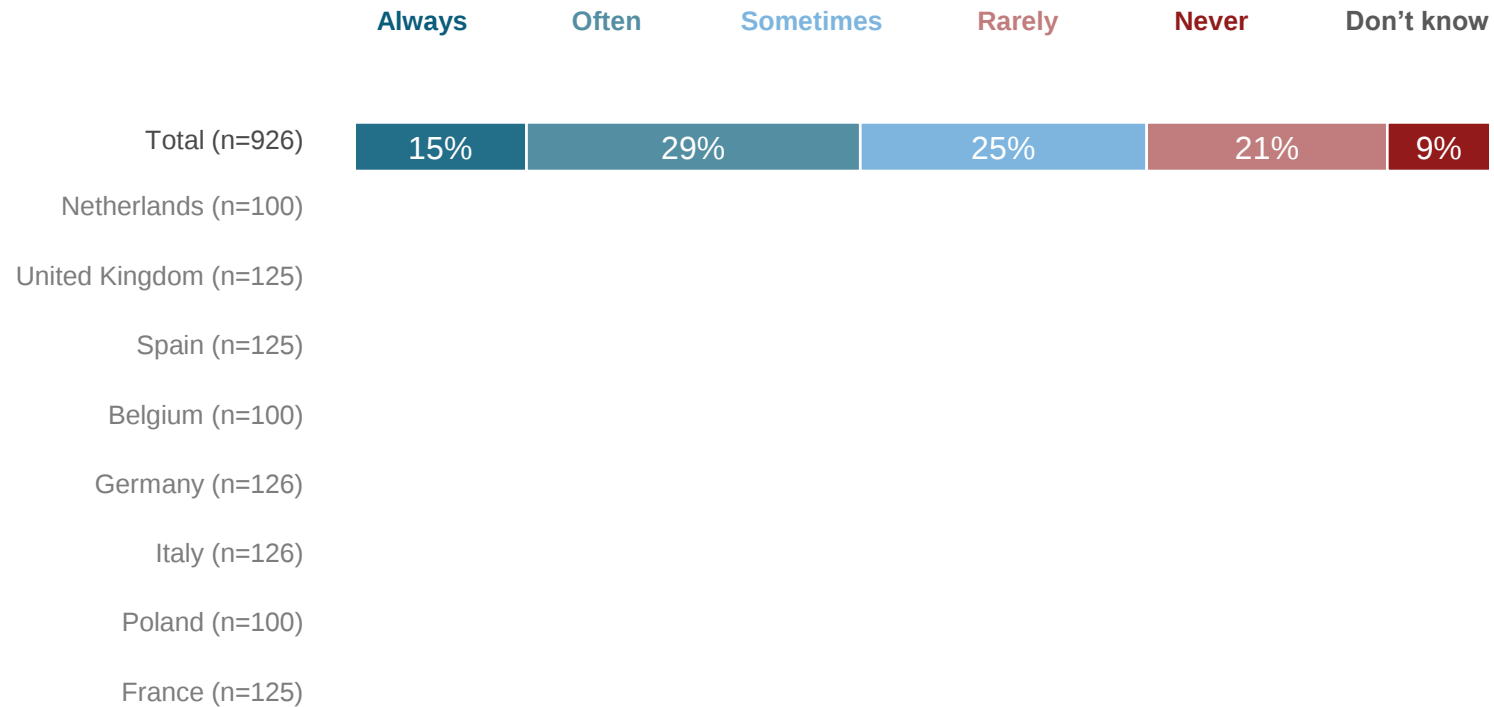


| Belgium | France | Germany | Italy | Netherlands | Poland | Spain | United Kingdom |
|---------|--------|---------|-------|-------------|--------|-------|----------------|
| n=100   | n=125  | n=125   | n=126 | n=100       | n=100  | n=125 | n=125          |
| x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
| n=35    | n=102  | n=88    | n=68  | n=68        | n=75   | n=87  | n=120          |
| x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |
| x%      | x%     | x%      | x%    | x%          | x%     | x%    | x%             |

# Sustainability ...

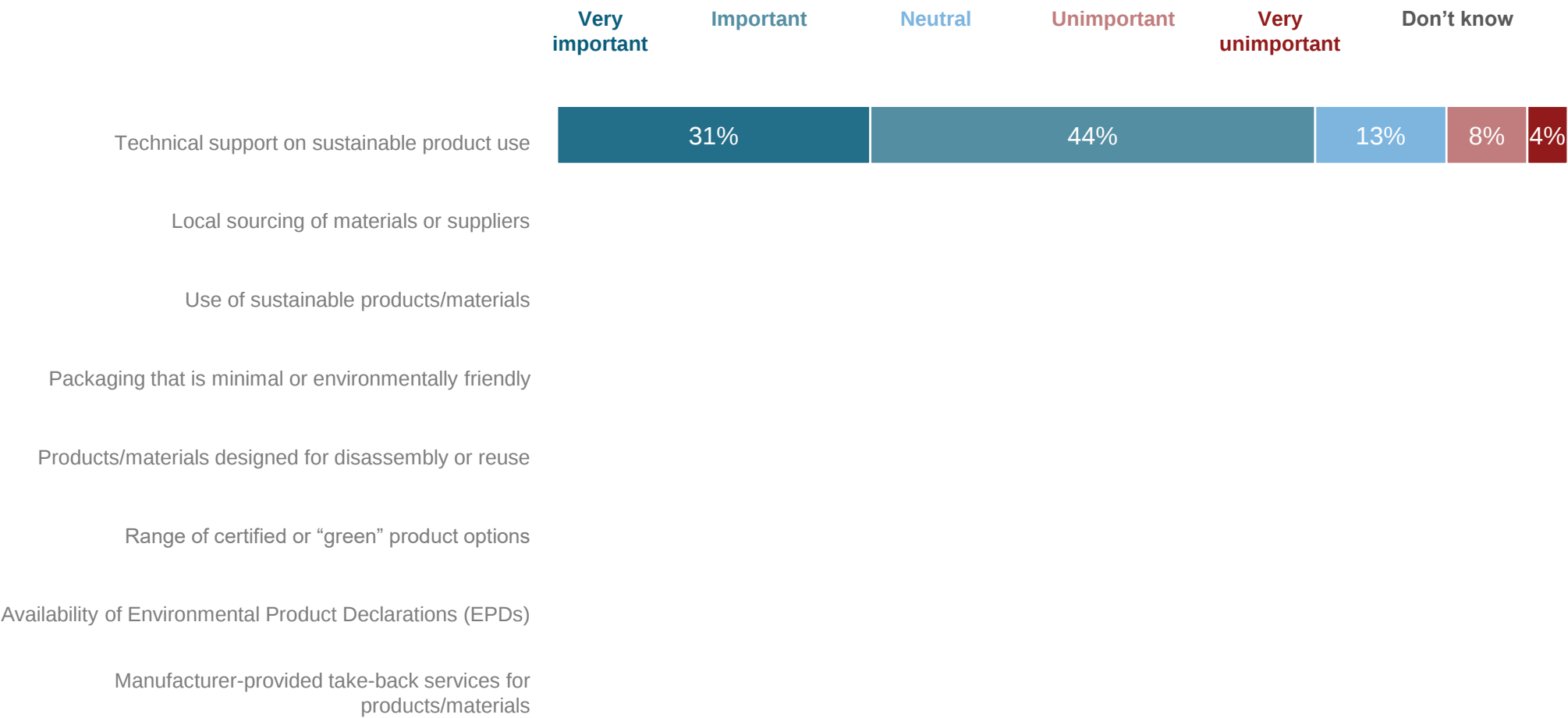
## Product/material selection

*When selecting materials or products for a building project, how often is sustainability a deciding factor?*



# When it comes to sustainability...

Importance of aspects  
*How important are the following aspects in your own construction projects when it comes to sustainability and circularity? (1=Very unimportant...5=very important)?*



# Digital tools for sustainability are ...

## Digital tools for sustainability – Top 10

*Which types of digital tools do you use when making sustainability-related product or material decisions?*

|                                                            | TOTAL                                                                                 | UK    | Germany | France | Spain | Italy | Netherlands | Belgium | Poland |
|------------------------------------------------------------|---------------------------------------------------------------------------------------|-------|---------|--------|-------|-------|-------------|---------|--------|
|                                                            | n=926                                                                                 | n=125 | n=125   | n=125  | n=125 | n=126 | n=100       | n=100   | n=100  |
| Don't know                                                 |  23% | x0%   | x0%     | x0%    | x0%   | x0%   | x0%         | x0%     | x0%    |
| No digital tools                                           |                                                                                       | x0%   | x0%     | x0%    | x0%   | x0%   | x0%         | x0%     | x0%    |
| BIM software with sustainability filters                   |                                                                                       | x0%   | x0%     | x0%    | x0%   | x0%   | x0%         | x0%     | x0%    |
| Manufacturer-specific configurators or specification tools |                                                                                       | x0%   | x0%     | x0%    | x0%   | x0%   | x0%         | x0%     | x0%    |
| General internet/search engines                            |                                                                                       | x0%   | x0%     | x0%    | x0%   | x0%   | x0%         | x0%     | x0%    |
| Building energy simulation tools                           |                                                                                       | x0%   | x0%     | x0%    | x0%   | x0%   | x0%         | x0%     | x0%    |
| Lifecycle assessment tools                                 |                                                                                       | x0%   | x0%     | x0%    | x0%   | x0%   | x0%         | x0%     | x0%    |
| Embodied carbon calculators                                |                                                                                       | x0%   | x0%     | x0%    | x0%   | x0%   | x0%         | x0%     | x0%    |
| Product databases with EPD filters                         |                                                                                       | x0%   | x0%     | x0%    | x0%   | x0%   | x0%         | x0%     | x0%    |
| Certification support platforms                            |                                                                                       | x0%   | x0%     | x0%    | x0%   | x0%   | x0%         | x0%     | x0%    |

# Architects see ...

## Future outlook – Top 10

*Which sustainability aspects will become significantly more important in architectural design over the next 5 years?*

|                                 | TOTAL | UK    | Germany | France | Spain | Italy | Netherlands | Belgium | Poland |
|---------------------------------|-------|-------|---------|--------|-------|-------|-------------|---------|--------|
|                                 | n=916 | n=125 | n=125   | n=125  | n=125 | n=126 | n=97        | n=99    | n=95   |
| Biobased materials              | 30%   | x%    | x%      | x%     | x%    | x%    | x%          | x%      | x%     |
| Reuse of building components    |       | x%    | x%      | x%     | x%    | x%    | x%          | x%      | x%     |
| Smart energy systems            |       | x%    | x%      | x%     | x%    | x%    | x%          | x%      | x%     |
| Embodied carbon                 |       | x%    | x%      | x%     | x%    | x%    | x%          | x%      | x%     |
| Low-impact building operations  |       | x%    | x%      | x%     | x%    | x%    | x%          | x%      | x%     |
| Don't know                      |       | x%    | x%      | x%     | x%    | x%    | x%          | x%      | x%     |
| Design for disassembly          |       | x%    | x%      | x%     | x%    | x%    | x%          | x%      | x%     |
| Circular material passports     |       | x%    | x%      | x%     | x%    | x%    | x%          | x%      | x%     |
| Economical aspects              |       | x%    | x%      | x%     | x%    | x%    | x%          | x%      | x%     |
| Innovative and durable building |       | x%    | x%      | x%     | x%    | x%    | x%          | x%      | x%     |

# Index

Background of the research

Economic developments

Sustainability

Research Background Appendix



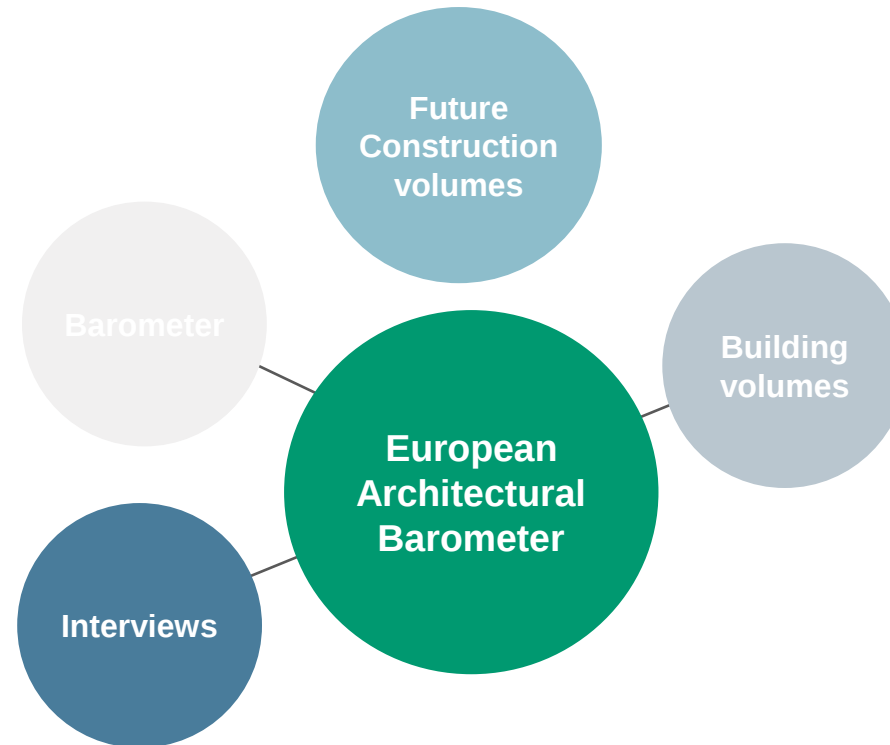
# About European Architectural Barometer

## 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.



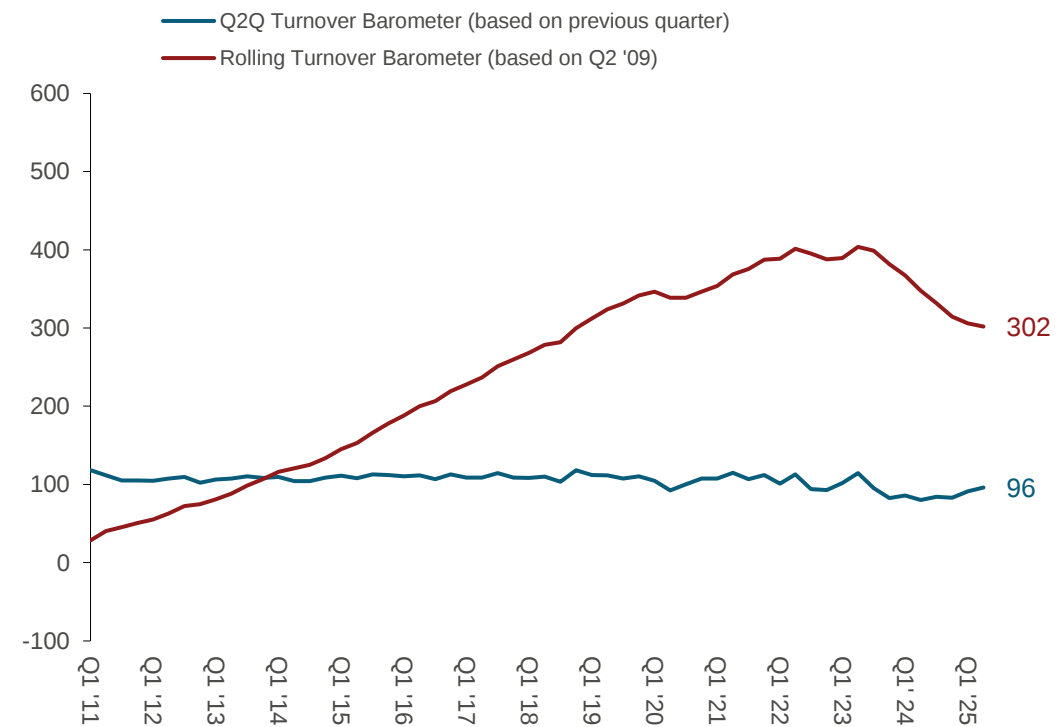
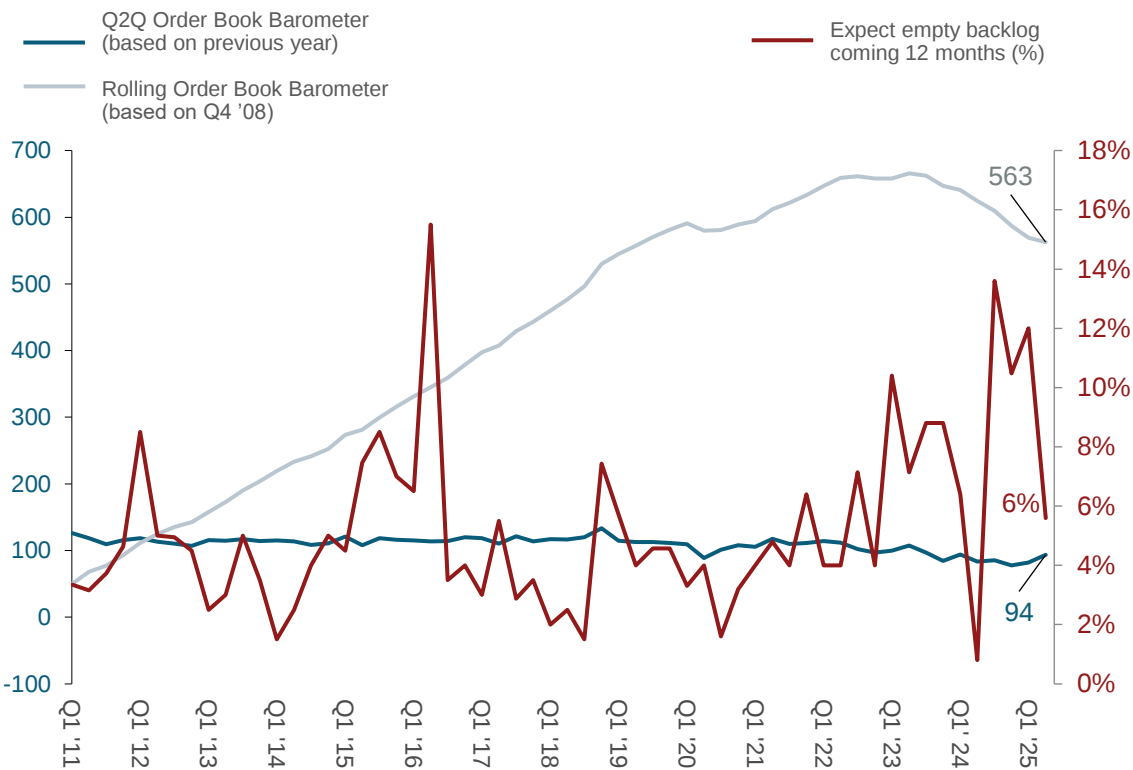
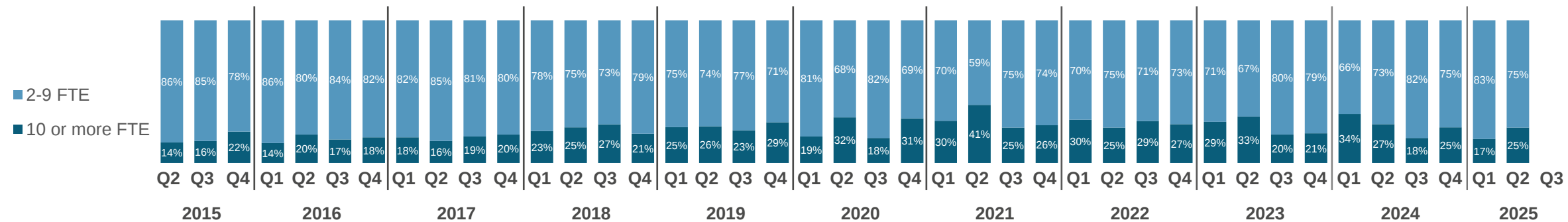
## Future construction volumes

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.

# Short-term outlook among German 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%)   |                                                                                   |         |          |                                                                                   |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |
| Slightly increased (0-5%)  |                                                                                   |         |          |                                                                                   |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |
| Stayed the same (0%)       |                                                                                   |         |          |                                                                                   |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |
| Slightly decreased (0-5%)  |                                                                                   |         |          |                                                                                   |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |
| Strongly decreased (>5%)   |                                                                                   |         |          |                                                                                   |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |
| Barometer turnover         |                                                                                   |         |          |                                                                                   |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |

## 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%)   |                                                                                   |         |          |                                                                                   |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |
| Slightly increased (0-5%)  |                                                                                   |         |          |                                                                                   |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |
| Stayed the same (0%)       |                                                                                   |         |          |                                                                                   |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |
| Slightly decreased (0-5%)  |                                                                                   |         |          |                                                                                   |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |
| Strongly decreased (>5%)   |                                                                                   |         |          |                                                                                   |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |
| Barometer order book       |                                                                                   |         |          |                                                                                   |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |

# 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                        |                                                                                   |         |          |                                                                                   |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |
| No                         |                                                                                   |         |          |                                                                                   |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |
| Do not know                |                                                                                   |         |          |                                                                                   |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |                                                                                     |         |          |

# 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

|                                                            |  |  |  |  |  |  |  |  |
|------------------------------------------------------------|-----------------------------------------------------------------------------------|------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| <b>Gross sample</b> (all attempts to approach respondents) | 2112                                                                              | 1651                                                                               | 2107                                                                                | 1956                                                                                | 1541                                                                                | 699                                                                                 | 1067                                                                                | -                                                                                   |
| <b>Net sample</b> (all approached respondents)             | 583                                                                               | 553                                                                                | 345                                                                                 | 291                                                                                 | 517                                                                                 | 445                                                                                 | 475                                                                                 | -                                                                                   |
| <b>Completed interviews</b>                                | 125                                                                               | 125                                                                                | 125                                                                                 | 100                                                                                 | 126                                                                                 | 100                                                                                 | 100                                                                                 | 100                                                                                 |
| <b>Response percentage</b> (interviews/ net sample)        | 21%                                                                               | 23%                                                                                | 36%                                                                                 | 43%                                                                                 | 24%                                                                                 | 22%                                                                                 | 21%                                                                                 | -                                                                                   |

# 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<br>Turnover Spain | Q2 '15 |        | Calculated<br>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                 |

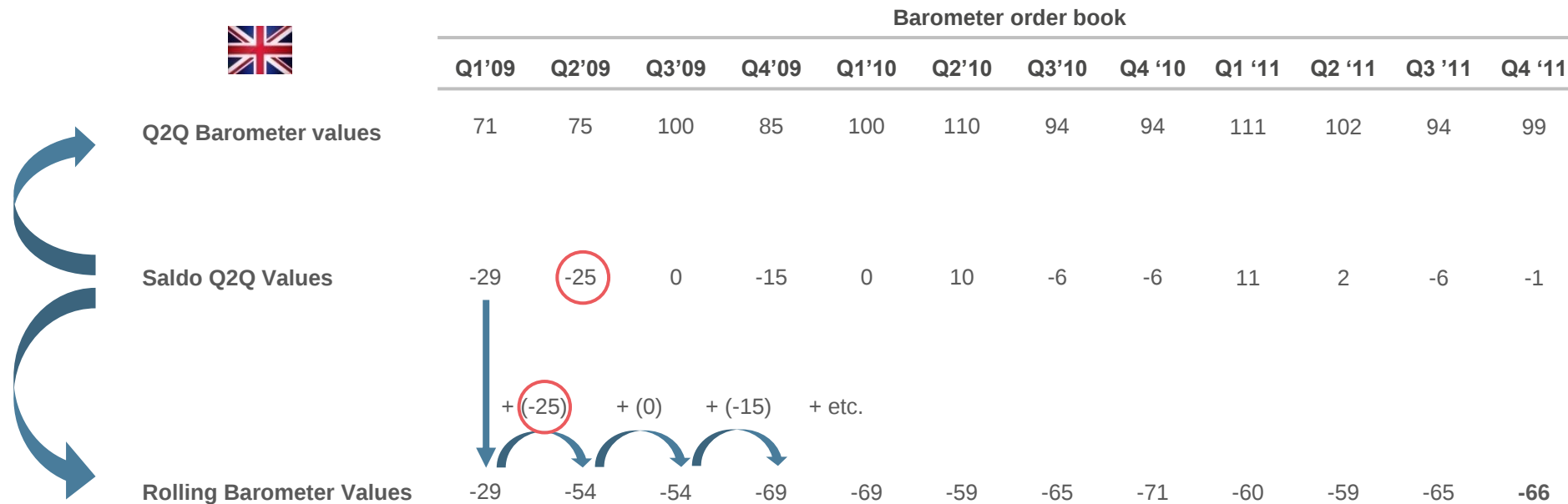
$$\text{Q2Q Saldo} = (2500 + 1400 - 150 - 800) / 100 = 30$$

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

# 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, USP 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.

## 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.

## 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.

## 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 – m<sup>2</sup> 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.

# What we do

## Examples



**Segmentation**



**Customer  
journey**



**Branding**



**Concept/  
product  
research**



**Customer  
satisfaction**



**Trends**



**Distribution  
research**



**Market  
exploration**



**Pricing**



**Market  
size**



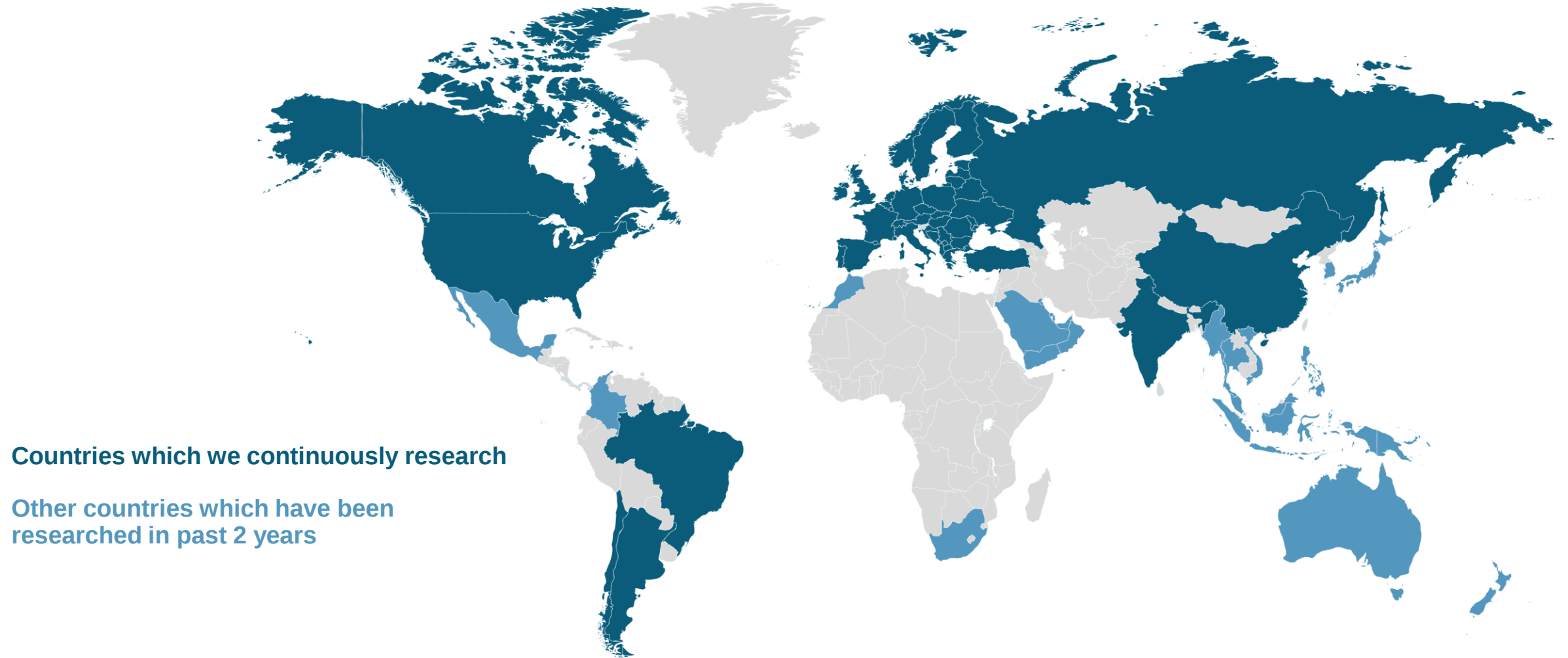
## Dedicated market research

- 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<br>Architectural<br>Barometer                                                                                                                                                       | European<br>Contractor<br>Monitor                                                                                                                                                            | European<br>Mechanical<br>Installation<br>Monitor                                                                                                                                 | European<br>Electrical<br>Installation<br>Monitor                                                                                                                                                 | European<br>Painter Insight<br>Monitor                                                                                                                                                                                          | European<br>Home Improvement<br>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"><li>• Germany</li><li>• United Kingdom</li><li>• France</li><li>• Netherlands</li><li>• Belgium</li><li>• Poland</li><li>• Spain</li><li>• Italy</li></ul> | <ul style="list-style-type: none"><li>• Germany</li><li>• United Kingdom</li><li>• France</li><li>• Netherlands</li><li>• Belgium</li><li>• Poland</li><li>• Spain</li><li>• Italy</li></ul> | <ul style="list-style-type: none"><li>• Germany</li><li>• United Kingdom</li><li>• France</li><li>• Netherlands</li><li>• Belgium</li><li>• Poland</li></ul>                      | <ul style="list-style-type: none"><li>• Germany</li><li>• United Kingdom</li><li>• France</li><li>• Netherlands</li><li>• Belgium</li><li>• Poland</li><li>• Spain</li></ul>                      | <ul style="list-style-type: none"><li>• Germany</li><li>• United Kingdom</li><li>• France</li><li>• Netherlands</li><li>• Belgium</li><li>• Poland</li><li>• Spain</li><li>• Italy</li><li>• Denmark</li><li>• Sweden</li></ul> | <ul style="list-style-type: none"><li>• Germany</li><li>• United Kingdom</li><li>• France</li><li>• Netherlands</li><li>• Belgium</li><li>• Poland</li><li>• Spain</li><li>• Italy</li><li>• Denmark</li><li>• Sweden</li><li>• Austria</li></ul> |
| Way of reporting   | Quarterly                                                                                                                                                                                    | Bi-annually                                                                                                                                                                                  | Quarterly                                                                                                                                                                         | Quarterly                                                                                                                                                                                         | Annually                                                                                                                                                                                                                        | Quarterly                                                                                                                                                                                                                                         |
| 2022 Theme topics  | <ul style="list-style-type: none"><li>• Q1: Sustainability</li><li>• Q2: Trends in material usage</li><li>• Q3: Decision making</li><li>• Q4: Brand health scan</li></ul>                    | <ul style="list-style-type: none"><li>• H1: Prefabrication</li><li>• H2: Digitalisation and BIM</li></ul>                                                                                    | <ul style="list-style-type: none"><li>• Q1: Digitalisation and BIM</li><li>• Q2: Prefabrication</li><li>• Q3: Smart buildings and products</li><li>• Q4: Sustainability</li></ul> | <ul style="list-style-type: none"><li>• Q1: Sustainability</li><li>• Q2: Smart buildings and products</li><li>• Q3: Services in the installation market</li><li>• Q4: Brand health scan</li></ul> | <ul style="list-style-type: none"><li>• Trend tracking</li><li>• Sustainability</li><li>• Labour shortage</li><li>• Online buying</li><li>• Sustainability</li></ul>                                                            | <ul style="list-style-type: none"><li>• Q1: Orientation; rise of digital natives</li><li>• Q2: Purchase Channels; online leaders</li><li>• Q3: Brand health check</li><li>• Q4: DIY vs DIFM; outsourcing jobs</li></ul>                           |

## We are active globally



# Principals of USP

| Construction                     |                                  |                            |                                 | DIY               |                     | Installation           |                    |
|----------------------------------|----------------------------------|----------------------------|---------------------------------|-------------------|---------------------|------------------------|--------------------|
| ASSA ABLOY                       | AkzoNobel                        | Wienerberger               | HILTI                           | OBI               | adeo                | ABB                    | BOSCH              |
| ArcelorMittal                    | DAW                              | 3M                         | SAINT-GOBAIN                    | ALLEGION          | maxeda<br>DIY Group | GRUNDFOS               | hager              |
| etex<br>inspiring ways of living | FESTOOL                          | Villeroy & Boch<br>1748    | DSM                             | 3V3               | ideal<br>STANDARD   | Schneider<br>Electric  | LG<br>Life's Good  |
| icopal                           | Interface®                       | WD-40                      | fischer<br>innovative solutions | BRIGGS & STRATTON | KOHLER              | MITSUBISHI<br>ELECTRIC | Panasonic®         |
| KNAUF                            | OWENS<br>CORNING®                | UNILIN<br>FOR SMART LIVING | PPG                             | Dulux             | K'ARCHER            | VIESSMANN              | Vaillant           |
| ROCKWOOL                         | sto<br>Building with conscience. | VELUX®                     | stiho                           | WAGNER            | GROHE               | signify                | ShurTech<br>Brands |
| Tarkett                          | TRE SPA®                         | tesa                       | DÖRKEN                          | Intergamma        | Yale                | sonepar                | TTI                |

# USP Marketing Consultancy

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