European Architectural Barometer Q4 2025

BIM and new digital tools –report impression

February 2026

a product by USP Marketing Consultancy

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- BIM and new digital tools
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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, Poland, Sweden and Denmark. 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

Report Q1 — May
Report Q2 — August
Report Q3 — November
Report Q4 — February

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

Jeroen de Gruijl
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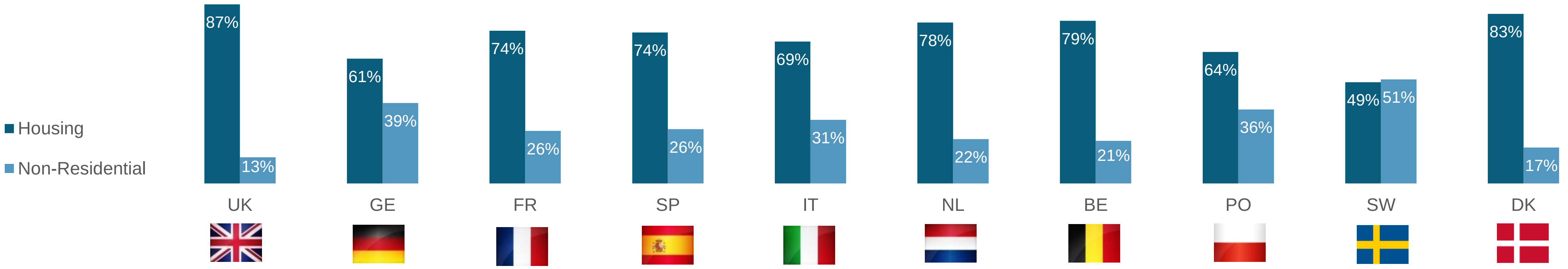
Background of the architects

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	**7,8**	**8,7**	**4,2**	**7,9**	**4,9**	**7,2**	**5,3**	**6,3**	**14,0**	**9,1**
2 – 4 FTE	45%	41%	74%	29%	68%	46%	62%	47%	31%	47%
5 – 9 FTE	36%	30%	19%	49%	20%	26%	19%	37%	25%	22%
10 – 19 FTE	12%	18%	5%	17%	9%	12%	10%	10%	22%	8%
20 – 39 FTE	4%	7%	2%	2%	2%	4%	3%	6%	10%	7%
> 40 FTE	3%	3%	0%	3%	1%	2%	1%	0%	10%	6%

Segment mostly active



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Research questions **Economic development**

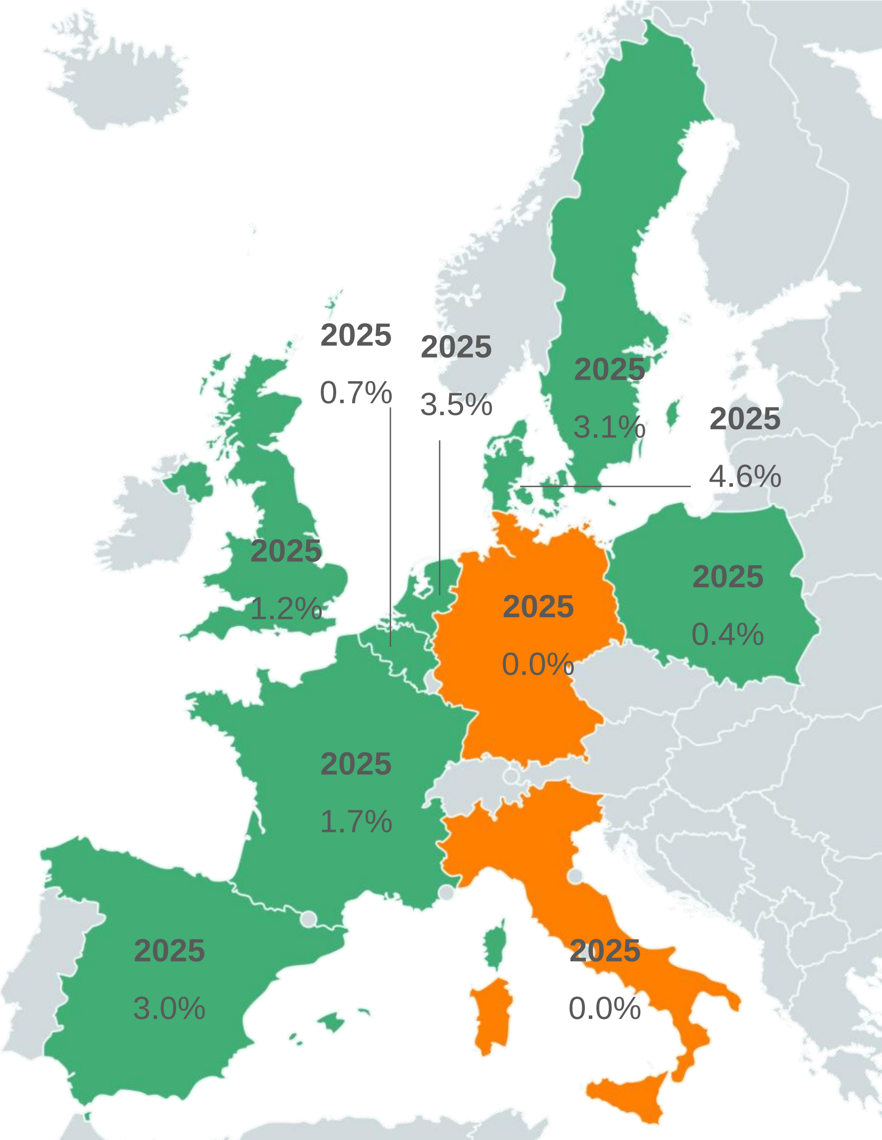
These questions are asked every measurement

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?

The share of architects expecting empty order books in the coming twelve months remains high in the United Kingdom.

Construction volumes 2025 European overview

- The developments in 2025 ...



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

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France

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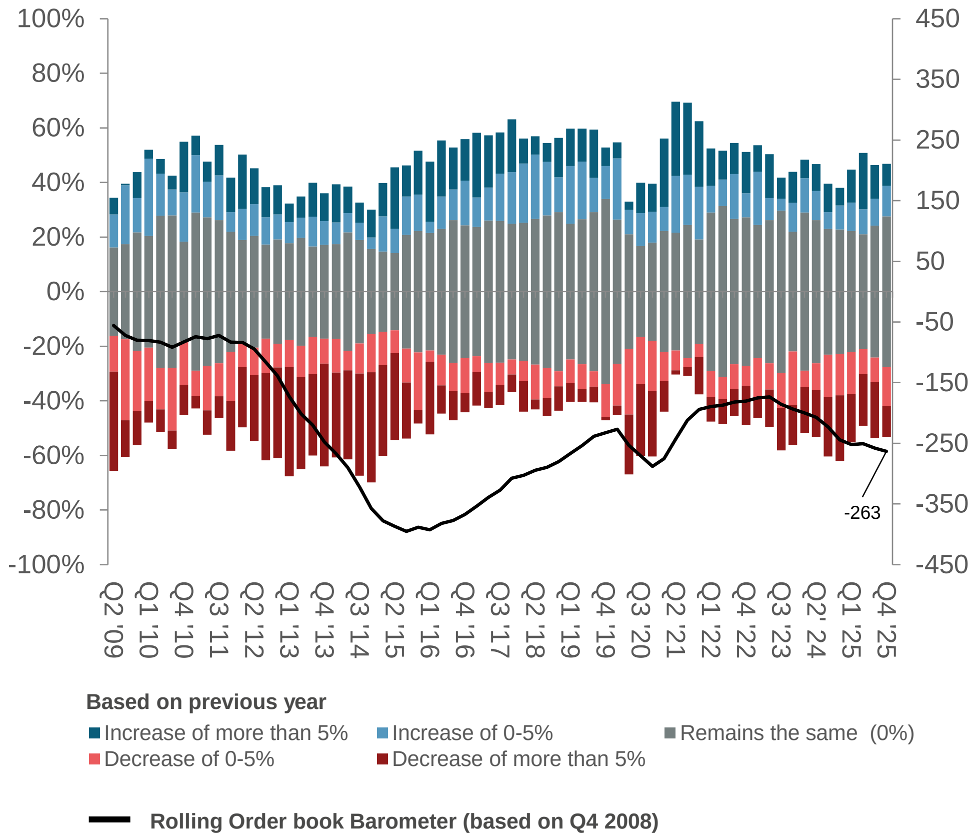
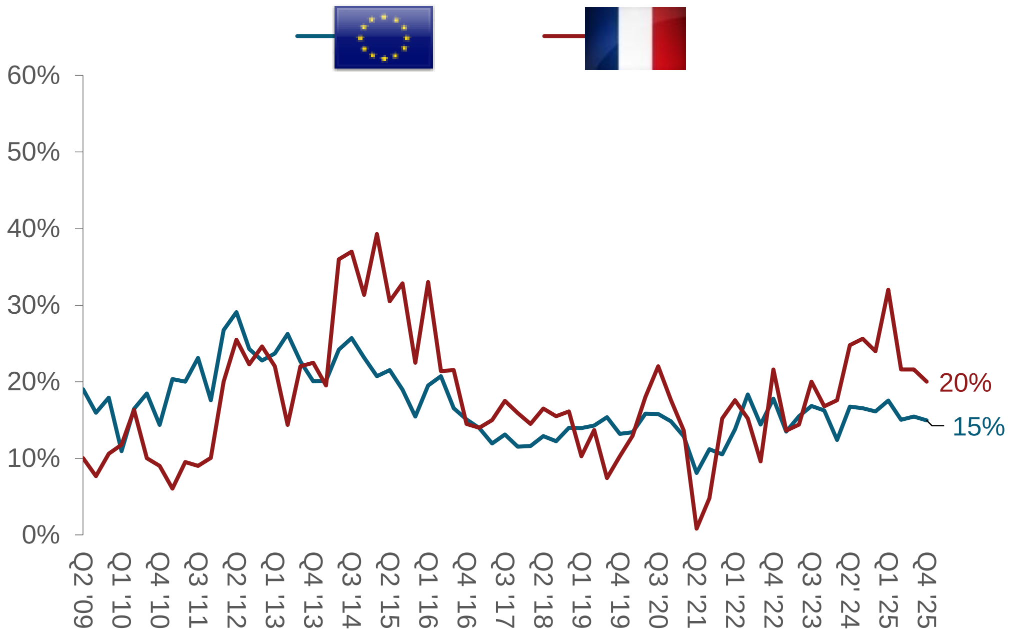
The share of architects who report a declining order book became smaller in 2025. Also, the share of architects expecting an empty order book stabilised.

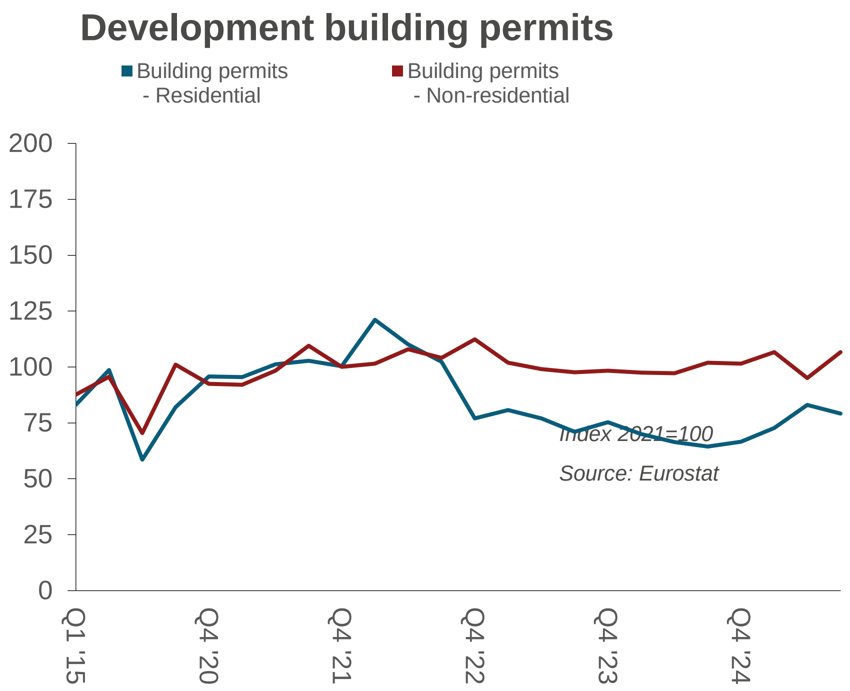
Development of order book



Expecting empty order book in 12 months



Other indicators in the French construction industry show a mixed image.

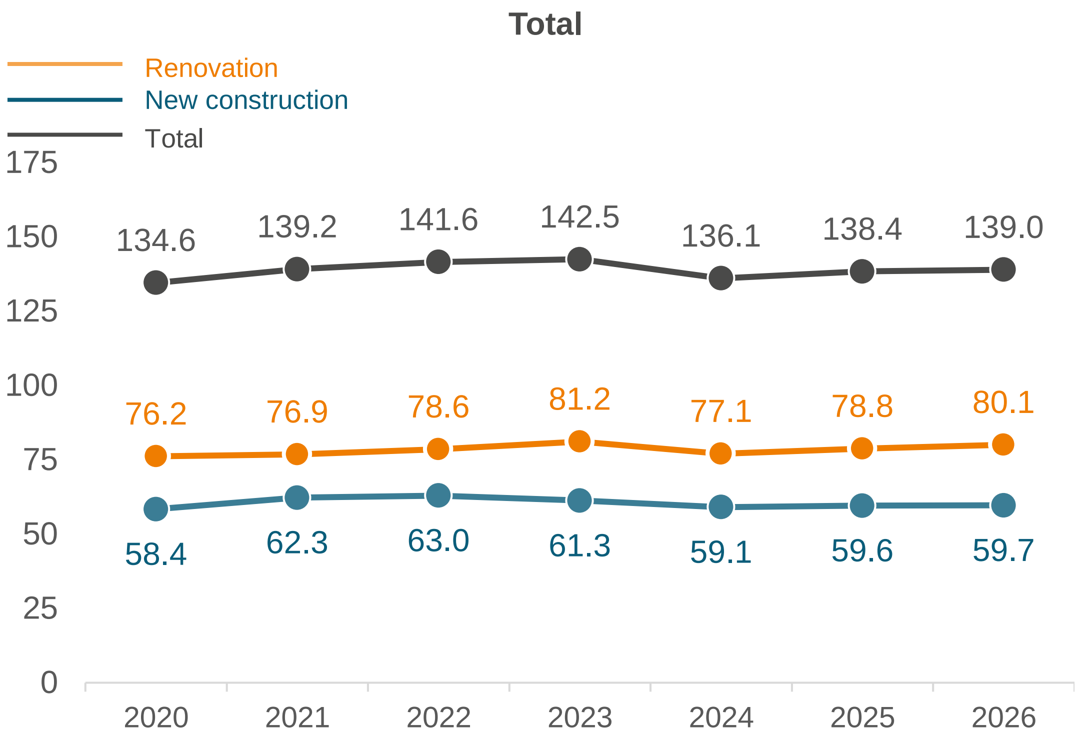


Economic and construction related indicators	Value Q4 2024	Value Q3 2025	Value Q4 2025	Q-2-Q development
GDP (quarterly growth rate) (%)*	0.4	0.5	0.2	Negative
Consumer confidence indicator**	-15.1	-18.3	-15.8	Positive
Industrial confidence indicator**	-11.7	-10.8	-7.8	Positive
Construction confidence indicator**	-11.9	-13.9	-15.7	Negative
Production value buildings (index 2021=100)**	90.1	78.6	84.8	Positive
Architects with postponed projects (%)***	59	52	64	Negative
Architects with cancelled projects (%)***	46	41	47	Negative
Building permits residential (index 2021=100)**	66.6	79.2	n/a	Positive
Building permits non-residential (index 2021=100)**	101.5	106.6	n/a	Negative

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

Forecast of building volumes in billion euros

(% change year over year)



% change in total output	**-11,6**	**3,4**	**1,7**	**0,6**	**-4,4**	**1,7**	**1,0**

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Questionnaire – Theme questions

BIM and new digital tools

1. To what extent have you experimented with any AI-tools in your design in the past 12 months?
2. Which AI tools do you use in your design process?
3. For what tasks have you used any AI-supported tools?
4. To what extent has AI reduced time spent on…. Modeling / Documentation?
5. What are the main reasons your firm does not use AI tools yet in design?
6. Are you familiar with BIM?
7. What is the share of projects in which BIM is used?
8. What percentage of the turnover/ revenue comes from BIM projects?
9. When will your company start developing BIM capability?
10. When did your company started to work with BIM?
11. Why has your organization not (yet) started with using BIM?
12. Which of the following features of BIM do you use?

- Generation of 2D drawings from the 3D model
- Determining quantities of construction materials, equipment and man hours
- Clash detection/ clash control, early warning of design errors
- 5D, coupling/ linkage with the costs
- Extra analysis and simulation capabilities (for for example energy performance, fire resistance, or sustainability)
- Exchange of structured product information via a Common Data Environment

13. Which BIM-related software do you use?
14. Have your clients or the project owners you work for increased their BIM requirements over the past 2 years?
15. Do you work more with open file data or with native file data?
16. How often do you experience problems when exchanging BIM files with other parties?
17. Which file formats cause the most issues in your projects?
18. Can you mention any platform or library where you get your specific BIM information and objects?
19. Which types of sustainability data are most useful to you?
20. When using BIM objects, how important is it to you that they include environmental or sustainability information?

Management summary – AI tools

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Insight 2

Management summary - BIM

1 **Insight 1**

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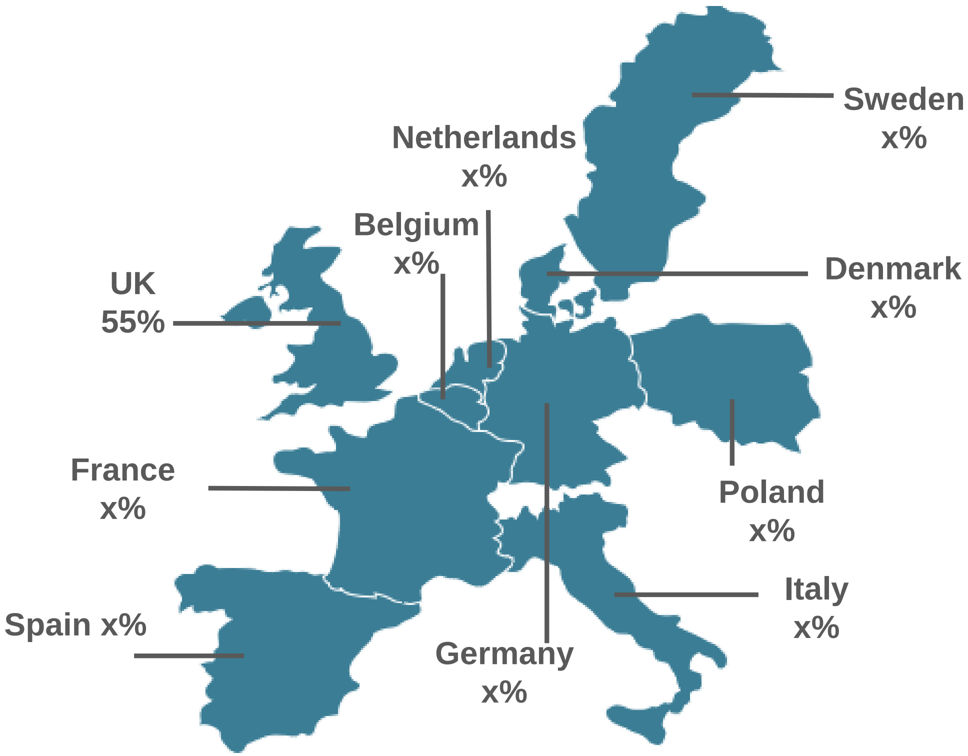
Usage of AI tools in design across Europe *(sum of results for answers <u>regularly</u> and <u>occasionally</u>)*
To what extent have you experimented with any AI-tools in your design in the past 12 months?

Total = x%



Total N=1076; Belgium N=100; France N=125; Germany N=125; Italy N=126; Netherlands N=100; Poland N=100; Spain N=125; UK N=125; Sweden N=75; Denmark N=75.

Conclusion...

AI tools used – Top 10
Which AI tools do you use in your design process?

	Total	Belgium	France	Germany	Italy	Netherlands	Poland	Spain	UK	Sweden	Denmark
ChatGPT	64%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%

Total N=629; Belgium N=49; France N=45; Germany N=69; Italy N=83; Netherlands N=61; Poland N=64; Spain N=87; UK N=69; Sweden N=45; Denmark N=57.

Conclusion...

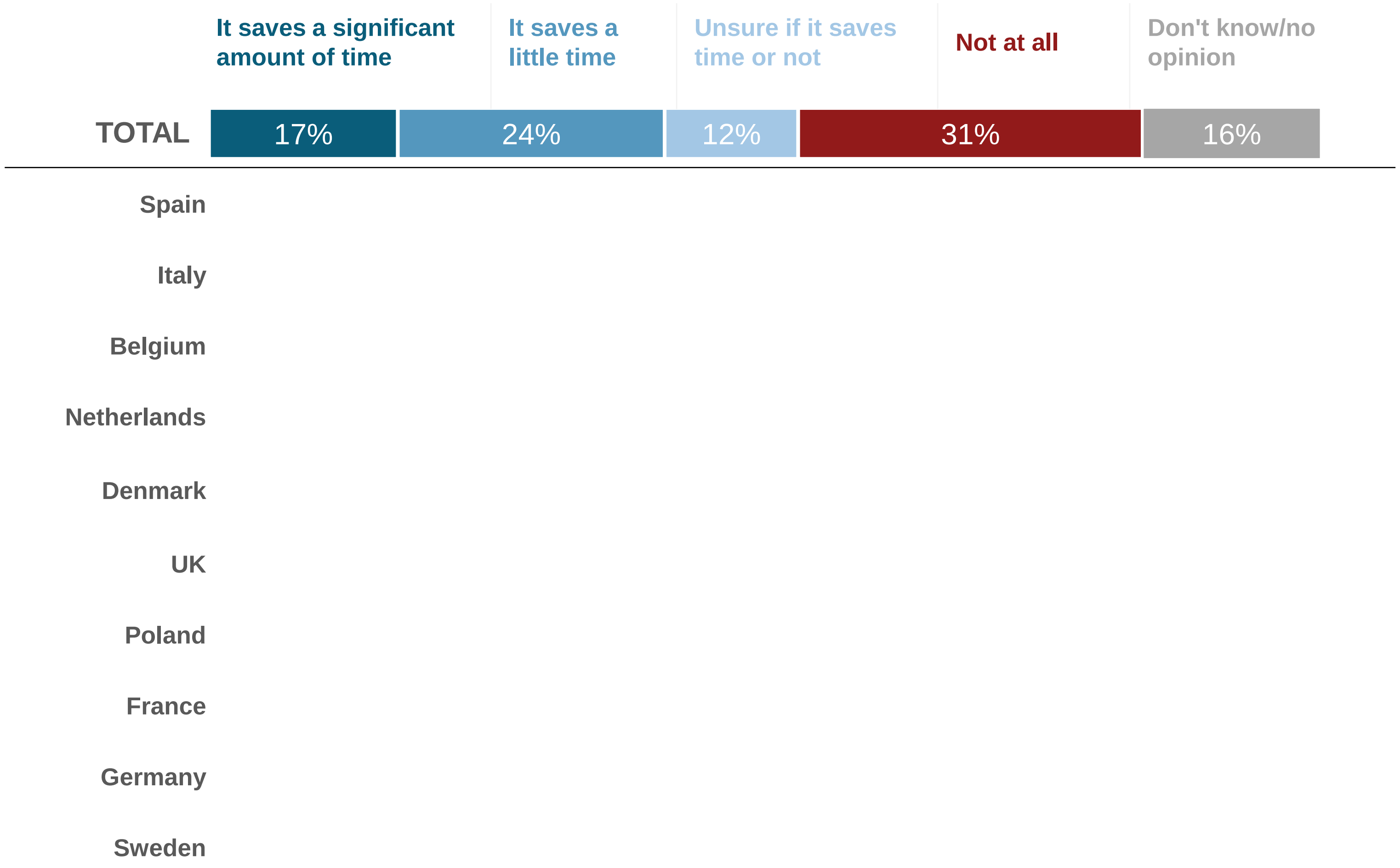
Tasks supported by AI tools – Top 10
For what tasks have you used any AI-supported tools?

	Total	Belgium	France	Germany	Italy	Netherlands	Poland	Spain	UK	Sweden	Denmark
Generating renderings or visualizations	47%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%

Total N=629; Belgium N=49; France N=45; Germany N=69; Italy N=83; Netherlands N=61; Poland N=64; Spain N=87; UK N=69; Sweden N=45; Denmark N=57.

Conclusion...

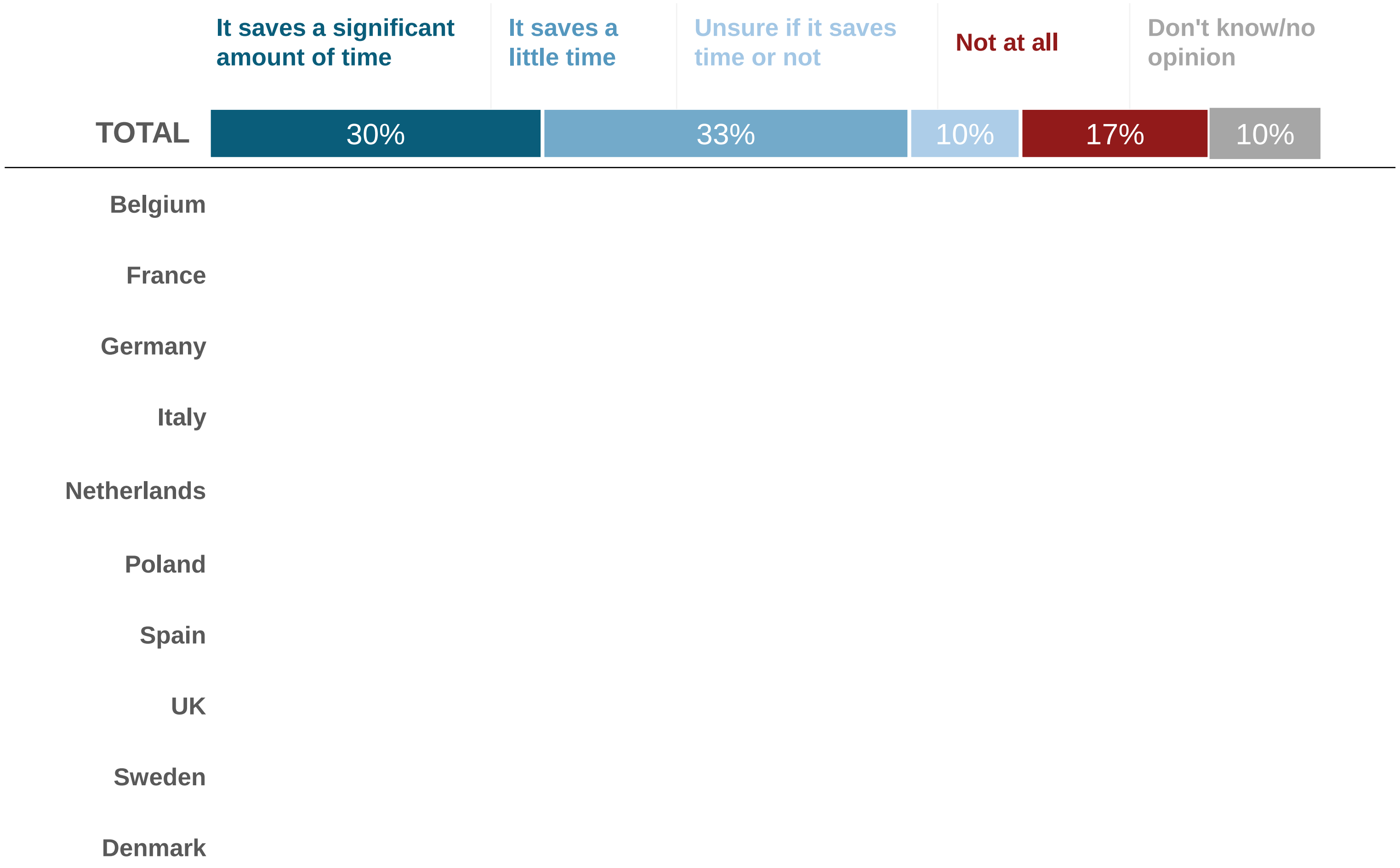
Time savings achieved with AI use - modelling
To what extent has AI reduced time spent on modelling?



Total N=629; Belgium N=49; France N=45; Germany N=69; Italy N=83; Netherlands N=61; Poland N=64; Spain N=87; UK N=69; Sweden N=45; Denmark N=57.

Conclusion...

Time savings achieved with AI use - documentation
To what extent has AI reduced time spent on documentation?



Total N=629; Belgium N=49; France N=45; Germany N=69; Italy N=83; Netherlands N=61; Poland N=64; Spain N=87; UK N=69; Sweden N=45; Denmark N=57.

Conclusion...

Reasons for not using AI tools among non-users – Top 10
What are the main reasons your firm does not use AI tools yet in design?

	Total	Belgium	France	Germany	Italy	Netherlands	Poland	Spain	UK	Sweden	*Denmark
No clear benefit for us	35%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%

Total N=447; Belgium N=51; France N=80; Germany N=57; Italy N=43; Netherlands N=40; Poland N=36; Spain N=37; UK N=56; Sweden N=30; Denmark N=18.
**Note: Due to low amount of measurements (less than 30), results should be taken as indicative.*

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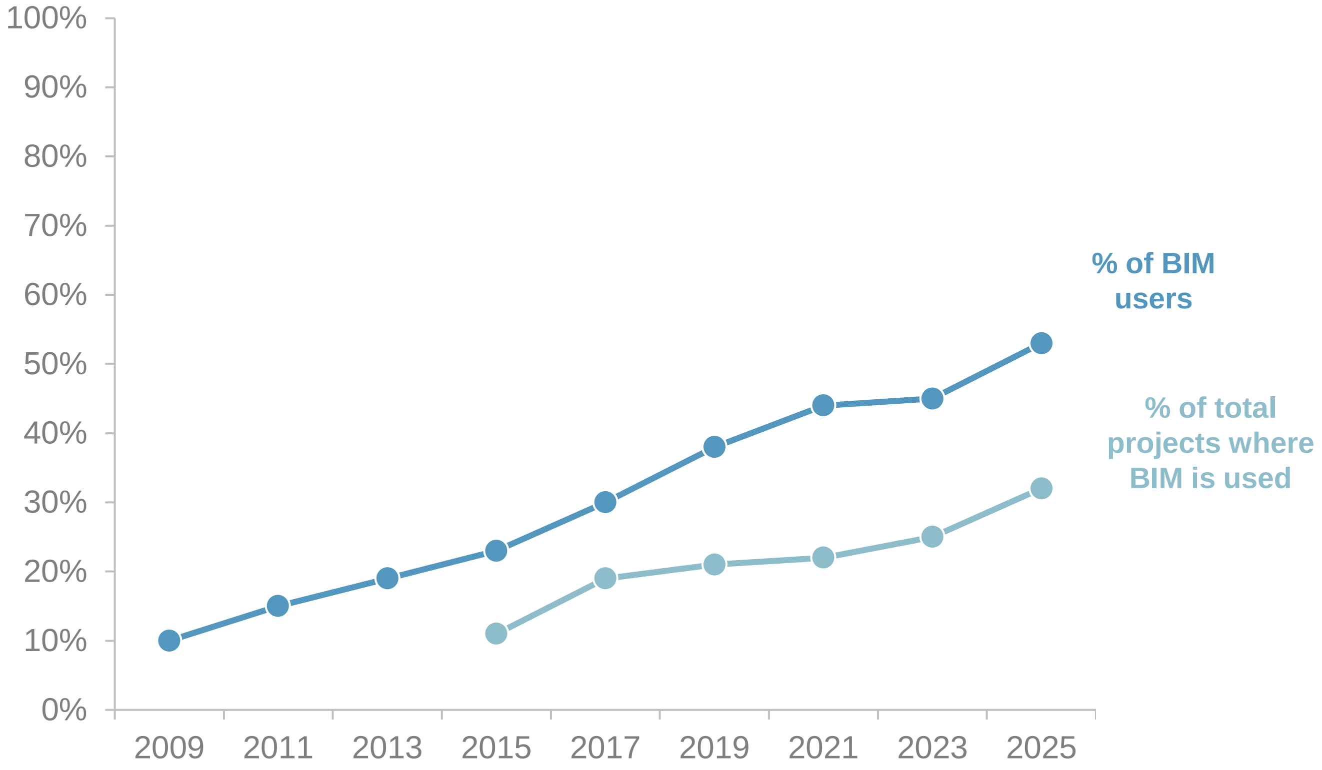
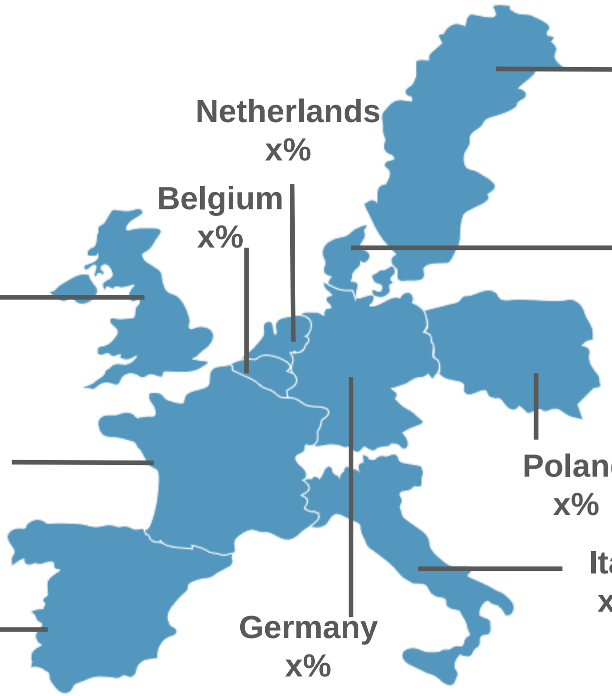
BIM usage over the years
What is the share of projects in which BIM is used?



Total N=926
Note: In order for results to be comparable with previous waves, the 2025 result excludes Denmark and Sweden.

Conclusion...

BIM usage by country



BIM usage – ranking of the countries

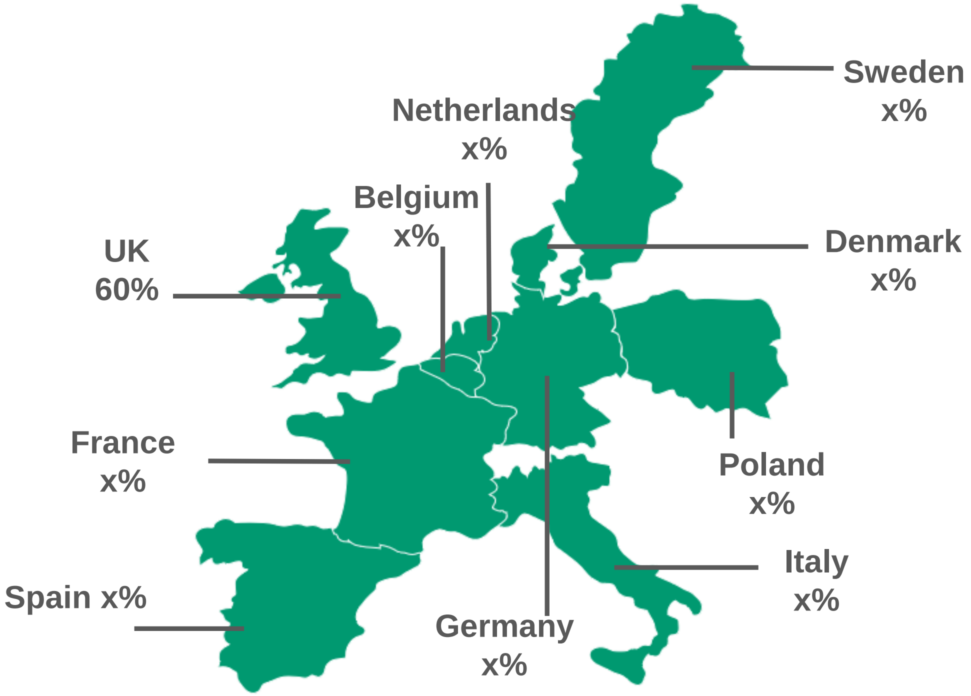
Country	Ranking of BIM Users 2023	Ranking of BIM users 2025
Belgium		
France		
Germany		
Italy		
Netherlands		
Poland		
Spain		
UK		
Sweden		
Denmark		

Belgium N=100; France N=125; Germany N=125; Italy N=126; Netherlands N=100; Poland N=100; Spain N=125; UK N=125; Sweden N=75; Denmark N=75.

Conclusion...

Turnover from BIM projects
What percentage of the turnover/ revenue comes from BIM projects?

	2025	2023	2021	2019
Total	x%	x%	x%	x%



Total N=427; Belgium N=41; France N=59; Germany N=38; Italy N=52; Netherlands N=69; Poland N=49; Spain N=62; UK N=57; Sweden N=65; Denmark N=52.
Note: In order for total results to be comparable with previous waves, the 2025 result excludes Denmark and Sweden.

Conclusion...

Turnover from BIM projects
*When did your company started to work with BIM?**
*When will your company start developing BIM capability?***

Country	Started using BIM (average)*	Plans to start using BIM (average)**
TOTAL	8.5 years ago	In 1.1 years
Belgium	x years ago	In x year(s)
France	x years ago	In x year(s)
Germany	x years ago	In x year(s)
Italy	x years ago	In x year(s)
Netherlands	x years ago	In x year(s)
Poland	x years ago	In x year(s)
Spain	x years ago	In x year(s)
United Kingdom	x years ago	In x year(s)
Sweden	x years ago	In x year(s)
Denmark	x years ago	In x year(s)

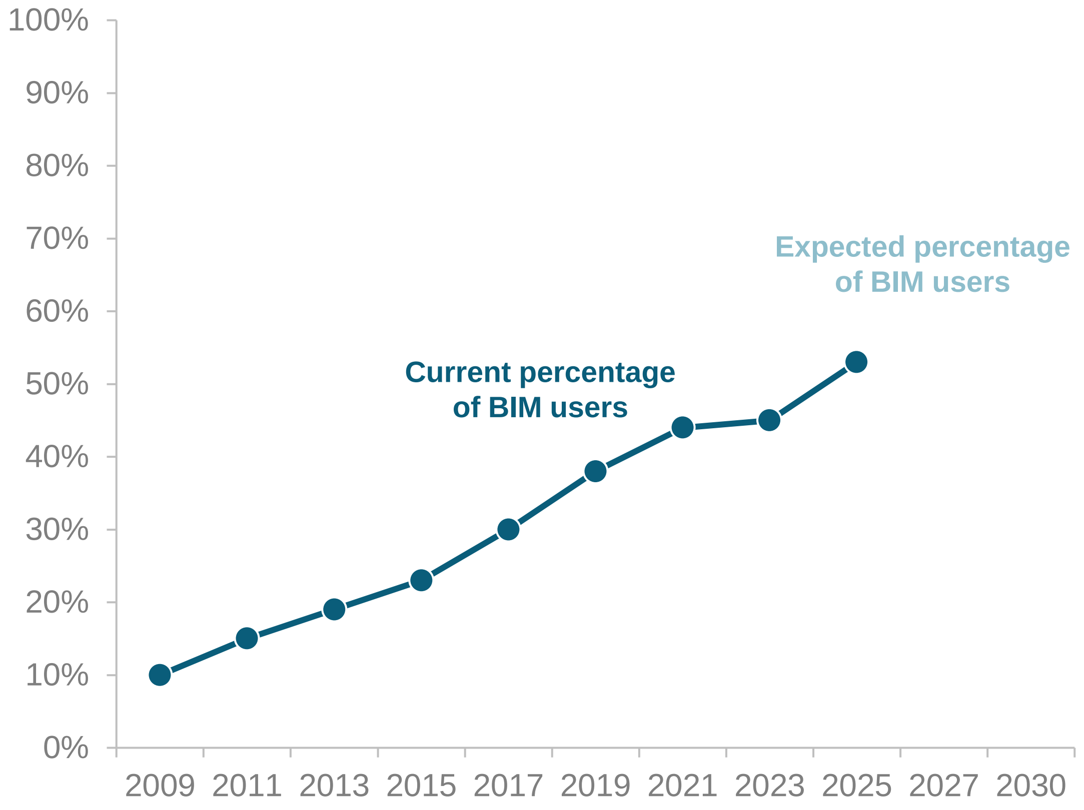
*Question was asked only to respondents who are already using BIM

**Question was asked only to respondents who are not using BIM yet

Started using BIM - Total N=601; Belgium N=48; France N=44; Germany N=47; Italy N=62; Netherlands N=19; Poland N=32; Spain N=62; UK N=53; Sweden N=5; Denmark N=13
Plans to start using BIM - Total N=385; Belgium N=49; France N=71; Germany N=53; Italy N=58; Netherlands N=76; Poland N=51; Spain N=62; UK N=61; Sweden N=66; Denmark N=54
****Note: Due to low amount of measurements (less than 30), results should be taken as indicative.*

Conclusion...

Current and expected share of BIM users
What is the share of projects in which BIM is used?
When will your company start developing BIM capability?



Expected share of BIM users in 2027 and 2030 per country

	2025 (now)	2027	2030
United Kingdom	x%	x%	x%
Germany	x%	x%	x%
France	x%	x%	x%
Spain	x%	x%	x%
Italy	x%	x%	x%
Netherlands	x%	x%	x%
Belgium	x%	x%	x%
Poland	x%	x%	x%
Sweden	x%	x%	x%
Denmark	x%	x%	x%

Total N=926; Belgium N=100; France N=125; Germany N=125; Italy N=126; Netherlands N=100; Poland N=100; Spain N=125; UK N=125; Sweden N=75; Denmark N=75
Note: To ensure results are comparable with previous waves, the 2025 result and 2027 and 2030 projections exclude Denmark and Sweden.
Note: Expected shares for 2027 and 2030 are calculated by adding current BIM users to non-users who indicate plans to adopt within the next 2 years (2027) or 5 years (2030).

Conclusion...

Reasons for not using BIM among non-users – Top 10
Why has your organization not (yet) started with using BIM?

	Total	Belgium	France	Germany	Italy	*Netherlands	Poland	*Spain	UK	*Sweden	*Denmark
BIM offers no benefits for my organization	40%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%

Total N=455; Belgium N=51; France N=54; Germany N=66; Italy N=68; Netherlands N=22; Poland N=47; Spain N=62; UK N=63; Sweden N=5; Denmark N=17.
**Note: Due to low amount of measurements (less than 30), results should be taken as indicative.*

USP

Conclusion...

Most used BIM features – Top 10
Which of the following features of BIM do you use?

	Total	Belgium	France	Germany	Italy	Netherlands	Poland	Spain	UK	Sweden	Denmark
Generation of 2D drawings from the 3D model	87%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%

Total N=620; Belgium N=49; France N=71; Germany N=59; Italy N=58; Netherlands N=78; Poland N=53; Spain N=62; UK N=62; Sweden N=70; Denmark N=58.

Conclusion...

Most used BIM-related software solutions – Top 10
Which BIM-related software do you use?

	Total	Belgium	France	Germany	Italy	Netherlands	Poland	Spain	UK	Sweden	Denmark
Autodesk Revit	47%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%

Total N=620; Belgium N=49; France N=71; Germany N=59; Italy N=58; Netherlands N=78; Poland N=53; Spain N=62; UK N=62; Sweden N=70; Denmark N=58.

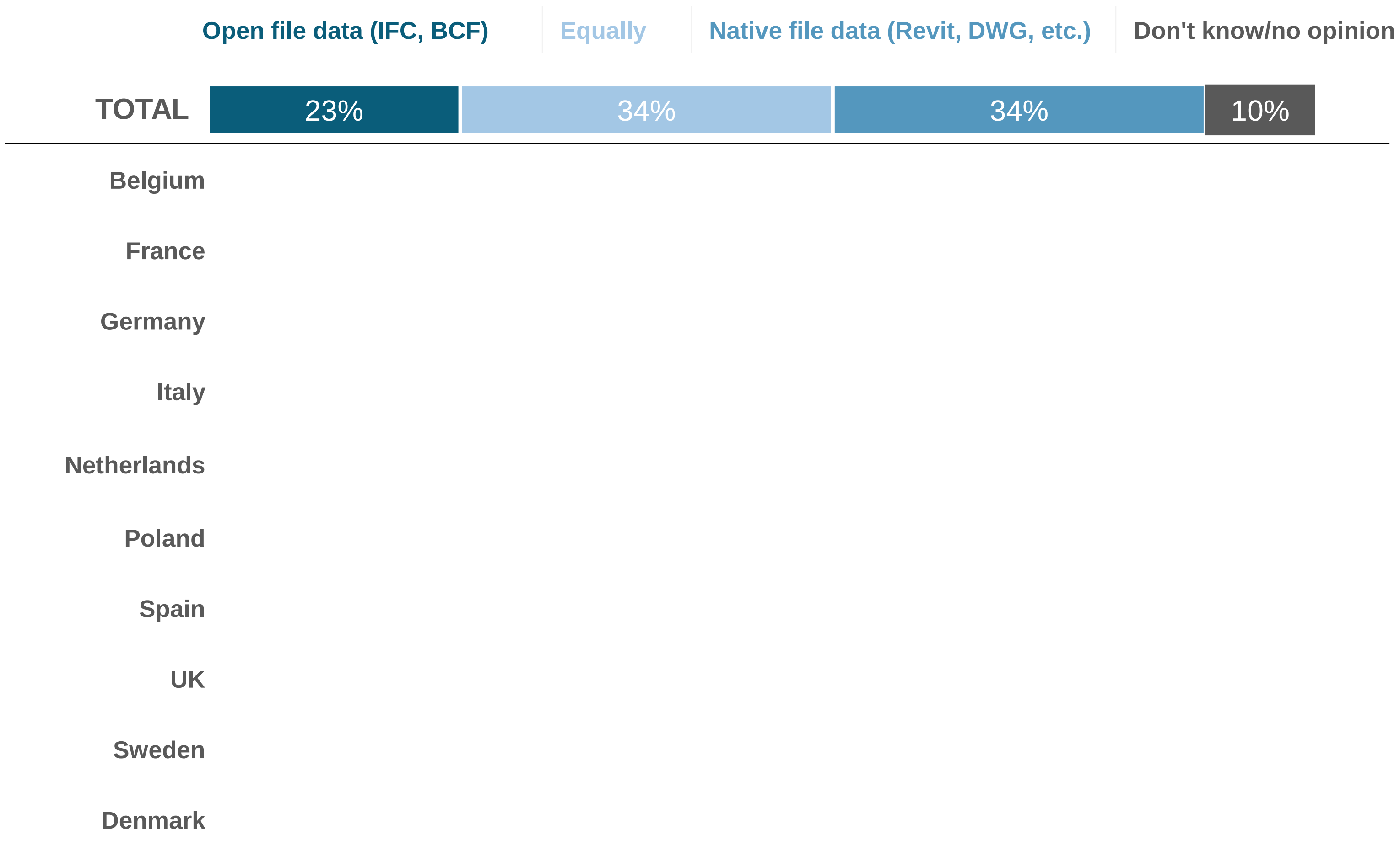
Conclusion...

Client demand for BIM
Have your clients or the project owners you work for increased their BIM requirements over the past 2 years?

Total N=1076; Belgium N=100; France N=125; Germany N=125; Italy N=126; Netherlands N=100; Poland N=100; Spain N=125; UK N=125; Sweden N=75; Denmark N=75.

Conclusion...

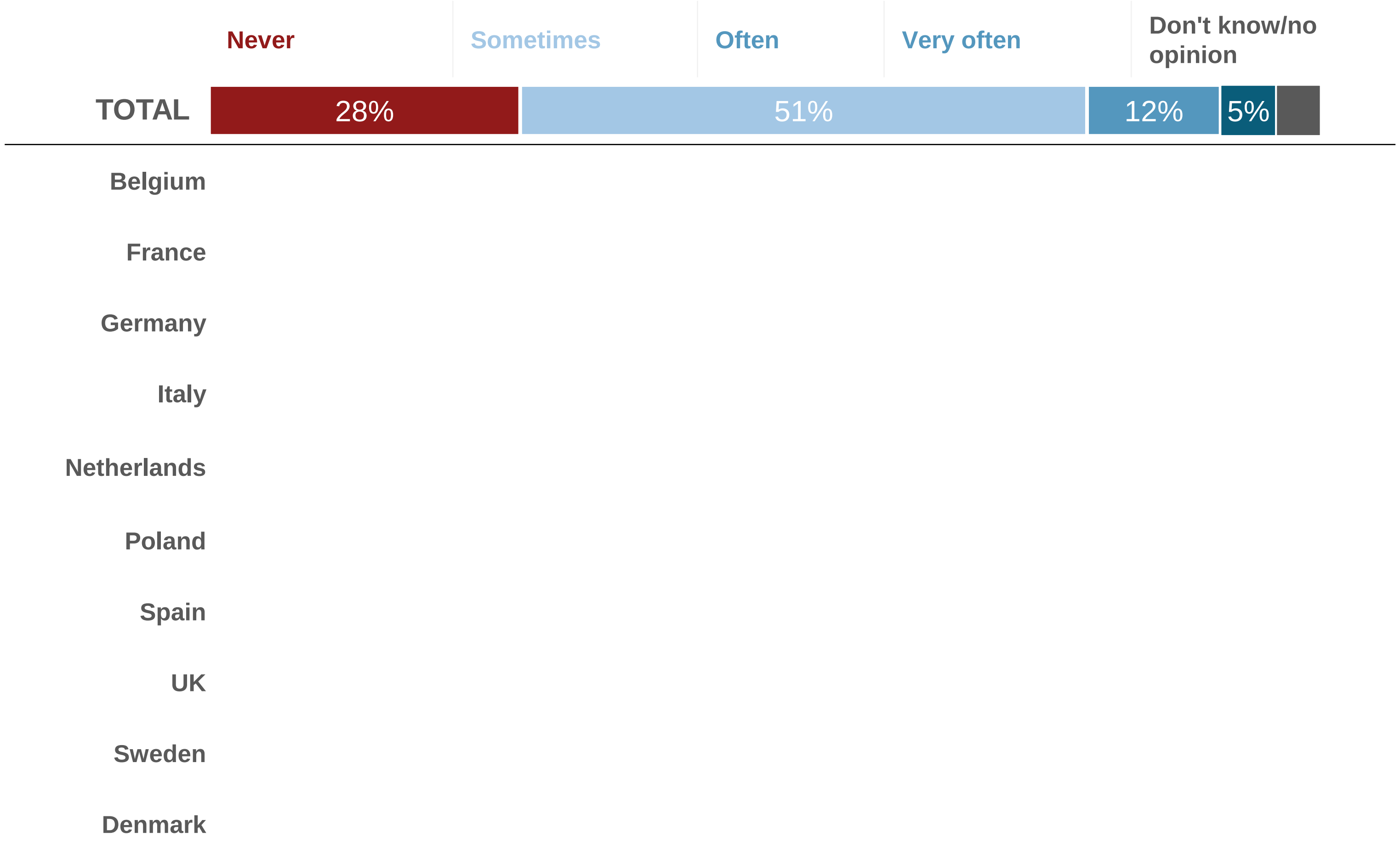
Preferred BIM data types
Do you work more with open file data or with native file data?



Total N=620; Belgium N=49; France N=71; Germany N=59; Italy N=58; Netherlands N=78; Poland N=53; Spain N=62; UK N=62; Sweden N=70; Denmark N=58.

Conclusion...

Exchanging BIM files with other parties
How often do you experience problems when exchanging BIM files with other parties?



Total N=620; Belgium N=49; France N=71; Germany N=59; Italy N=58; Netherlands N=78; Poland N=53; Spain N=62; UK N=62; Sweden N=70; Denmark N=58.

Conclusion...

File formats causing issues
Which file formats cause the most issues in your projects?

	Total	Belgium	France	Germany	*Italy	Netherlands	Poland	Spain	UK	Sweden	Denmark
IFC (.ifc) — Industry Foundation Classes	30%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%

Total N=434; Belgium N=35; France N=38; Germany N=35; Italy N=25; Netherlands N=60; Poland N=45; Spain N=55; UK N=43; Sweden N=61; Denmark N=37.
**Note: Due to low amount of measurements (less than 30), results should be taken as indicative.*

Conclusion...

BIM platforms and libraries
Can you mention any platform or library where you get your specific BIM information and objects?

	Total	Belgium	France	Germany	Italy	Netherlands	Poland	Spain	UK	Sweden	Denmark
BIMobject	23%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%

Total N=620; Belgium N=49; France N=71; Germany N=59; Italy N=58; Netherlands N=78; Poland N=53; Spain N=62; UK N=62; Sweden N=70; Denmark N=58.

Conclusion...

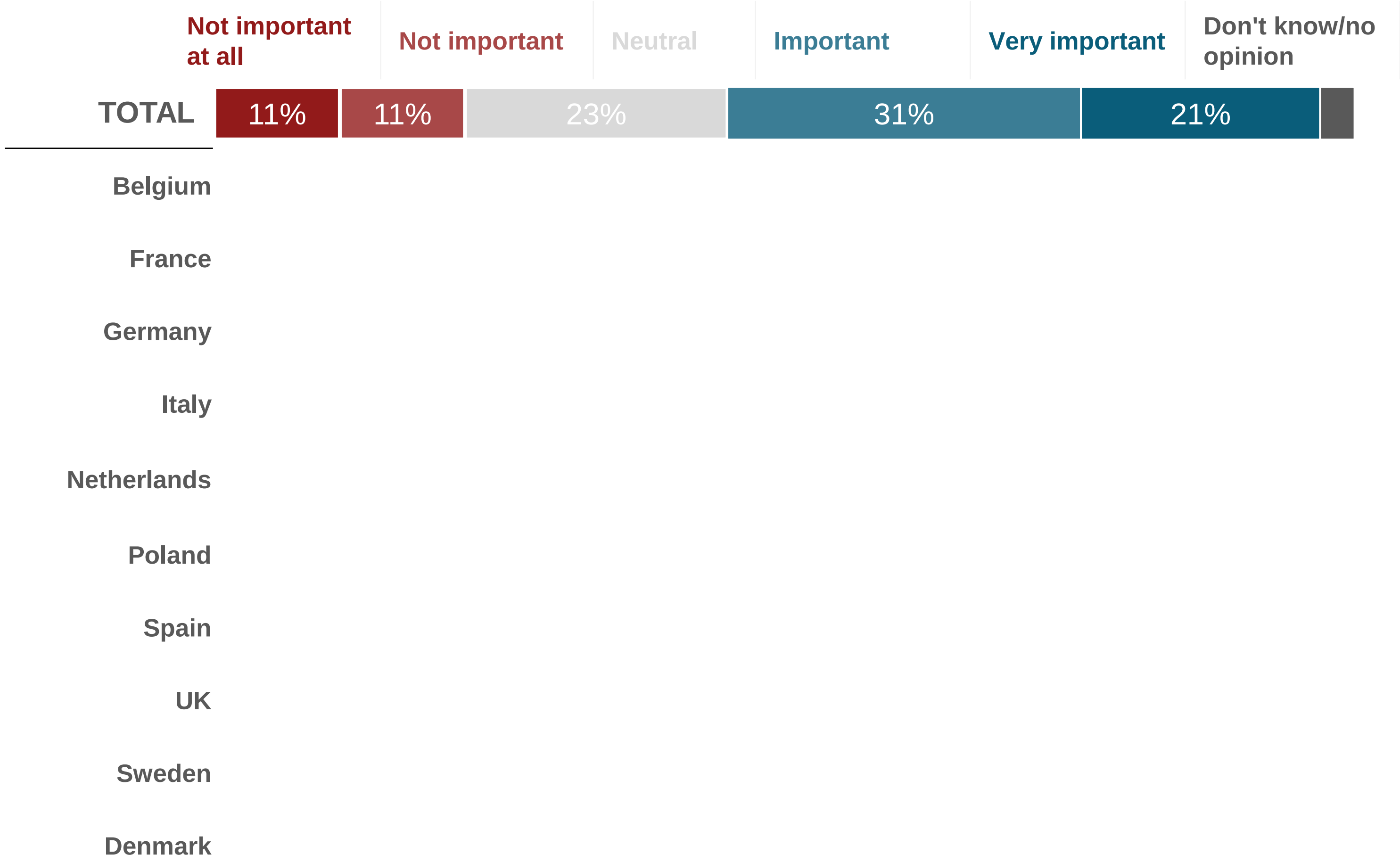
Sustainability data within BIM
Which types of sustainability data are most useful to you?

	Total	Belgium	France	Germany	Italy	Netherlands	Poland	Spain	UK	Sweden	Denmark
Operational energy performance / energy efficiency	20%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%
		x%	x%	x%	x%	x%	x%	x%	x%	x%	x%

Total N=1076; Belgium N=100; France N=125; Germany N=125; Italy N=126; Netherlands N=100; Poland N=100; Spain N=125; UK N=125; Sweden N=75; Denmark N=75.

Conclusion...

Relevance of sustainability information
When using BIM objects, how important is it to you that they include environmental or sustainability information?



Total N=620; Belgium N=49; France N=71; Germany N=59; Italy N=58; Netherlands N=78; Poland N=53; Spain N=62; UK N=62; Sweden N=70; Denmark N=58.

Index

Background of the research

Economic developments

BIM and new digital tools

Research Background Appendix

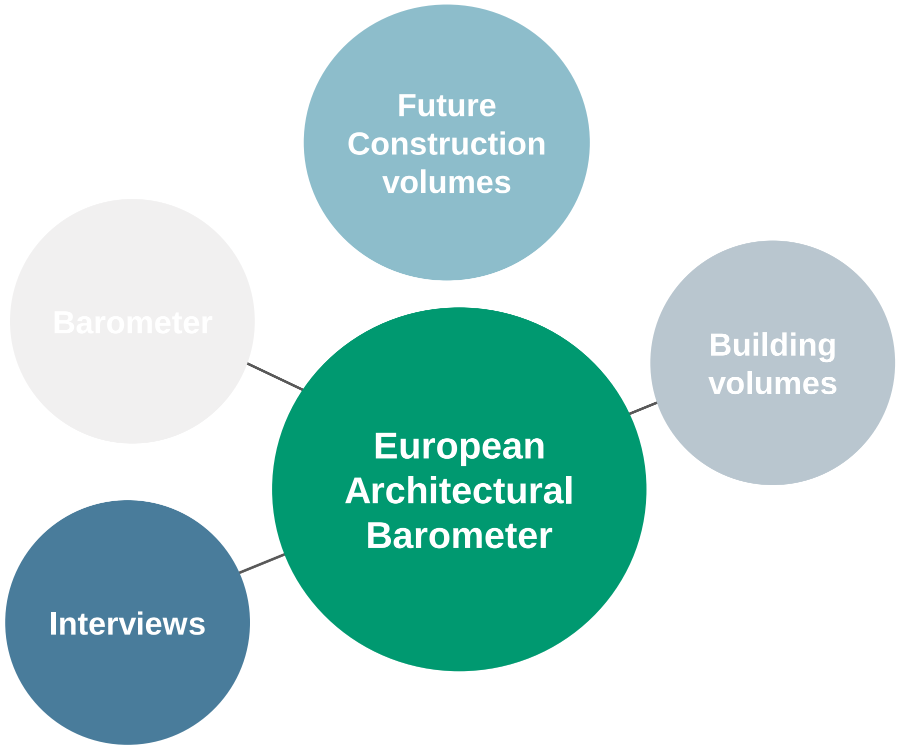
About European Architectural Barometer

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.



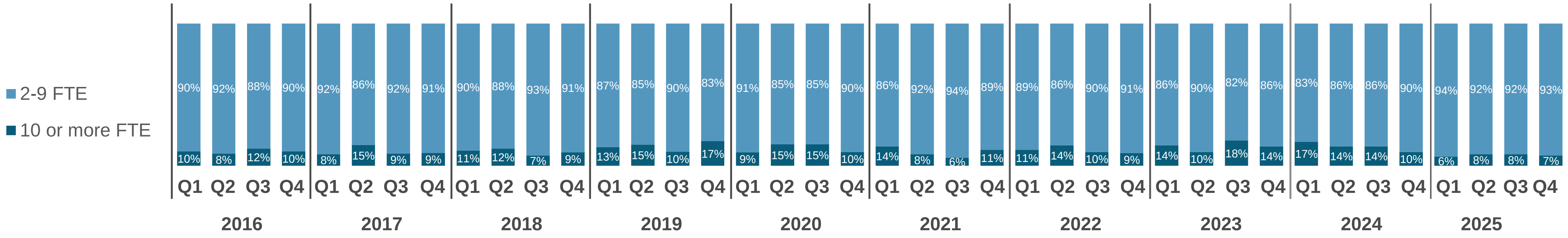
Future construction volumes

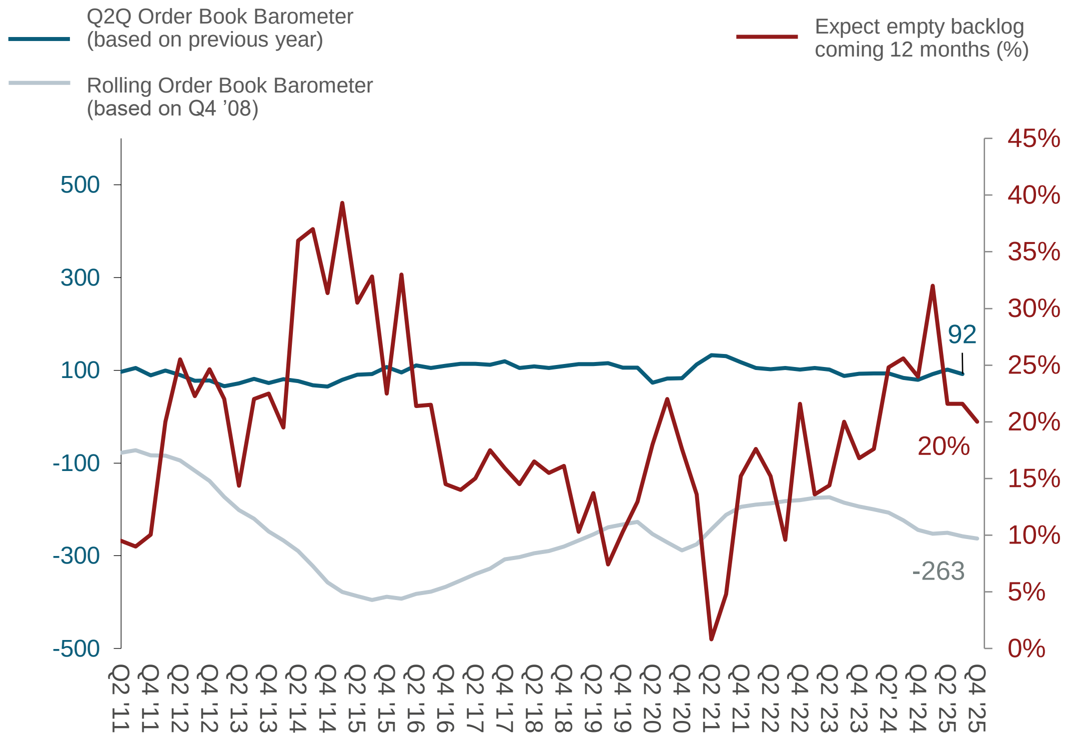
For decision makers charged with considerations of company resources, staffing and marketing strategy, a clear insight into future construction volumes is essential. However, economic indicators seldom provide an adequate picture of these volumes.

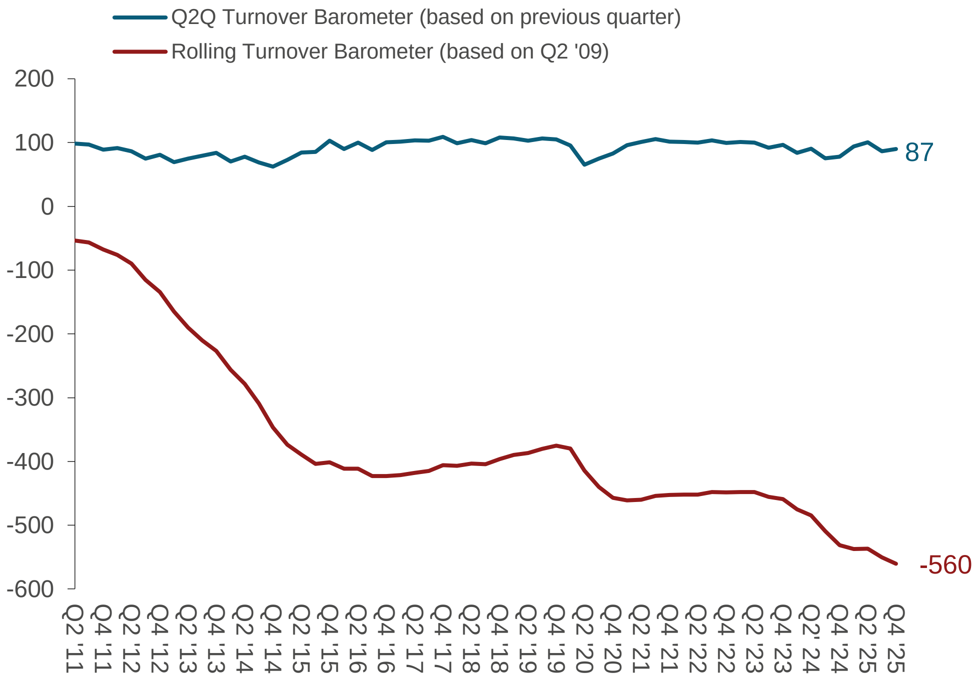
Building volumes

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 French 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
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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**
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**
Strongly increased (>5%)						
Slightly increased (0-5%)						
Stayed the same (0%)						
Slightly decreased (0-5%)						
Strongly decreased (>5%)						
Barometer turnover						

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																								

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**
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										
Gross sample (all attempts to approach respondents)	1951	1915	2439	1894	1379	2439	1252	2512	2281	1470
Net sample (all approached respondents)	643	885	472	434	537	560	450	991	1153	581
Completed interviews	125	125	125	155	126	125	100	100	75	75
Response percentage (interviews/ net sample)	19%	14%	26%	36%	23%	18%	22%	10%	7%	13%

USP

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, 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.

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. USP publishes its predictions for the building volumes based on the developments experienced by architects.

The model

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

High predictive value

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

Calculation predictive value

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

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

Future building volumes: Calculation

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

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

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

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

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

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.

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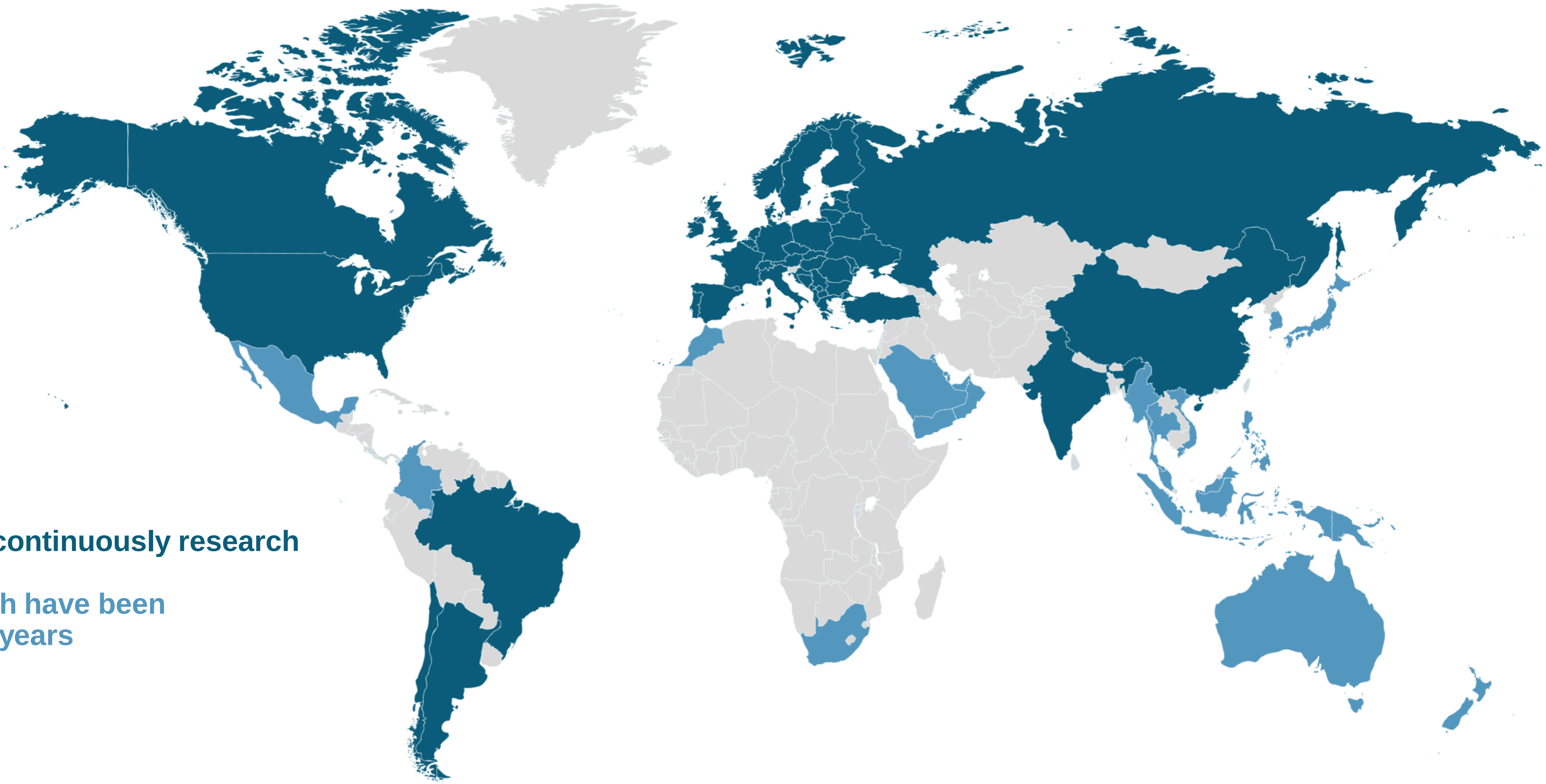
Our multi-client research monitors

USP

	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: Sustainability	• Q1: Sustainability • Q2: Smart buildings and products • Q3: Services in the installation market • Q4: Brand health scan	• Trend tracking • Sustainability • Labour shortage • Online buying • Sustainability	• 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

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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	V33	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