European Architectural Barometer Q4 2025

BIM and new digital tools – 10 countries report

February 2026

EXCERPTS – report impression & selected study results

a product by USP Marketing Consultancy

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About European Architectural Barometer

THE GOAL

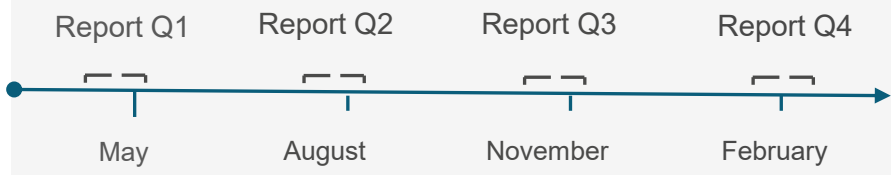
The objective of the European Architectural Barometer of USP Marketing Consultancy is to offer profound insight into the current economic situation and trends among architectural firms in the Netherlands, Germany, the UK, France, Spain, Italy, Belgium, Poland, Sweden and Denmark. The European Architectural 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



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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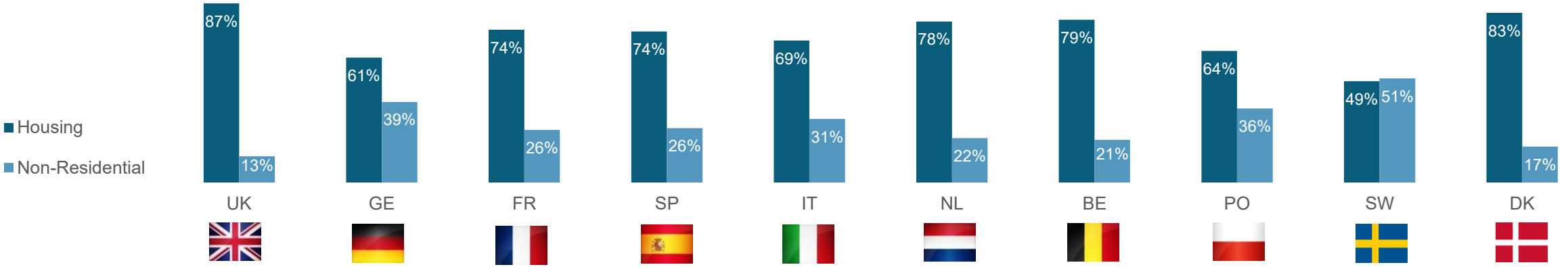
Background of the architects

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

	UK	GE	FR	SP	IT	NL	BE	PO	SW	DK
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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Questionnaire – Economic development

These questions are asked every measurement

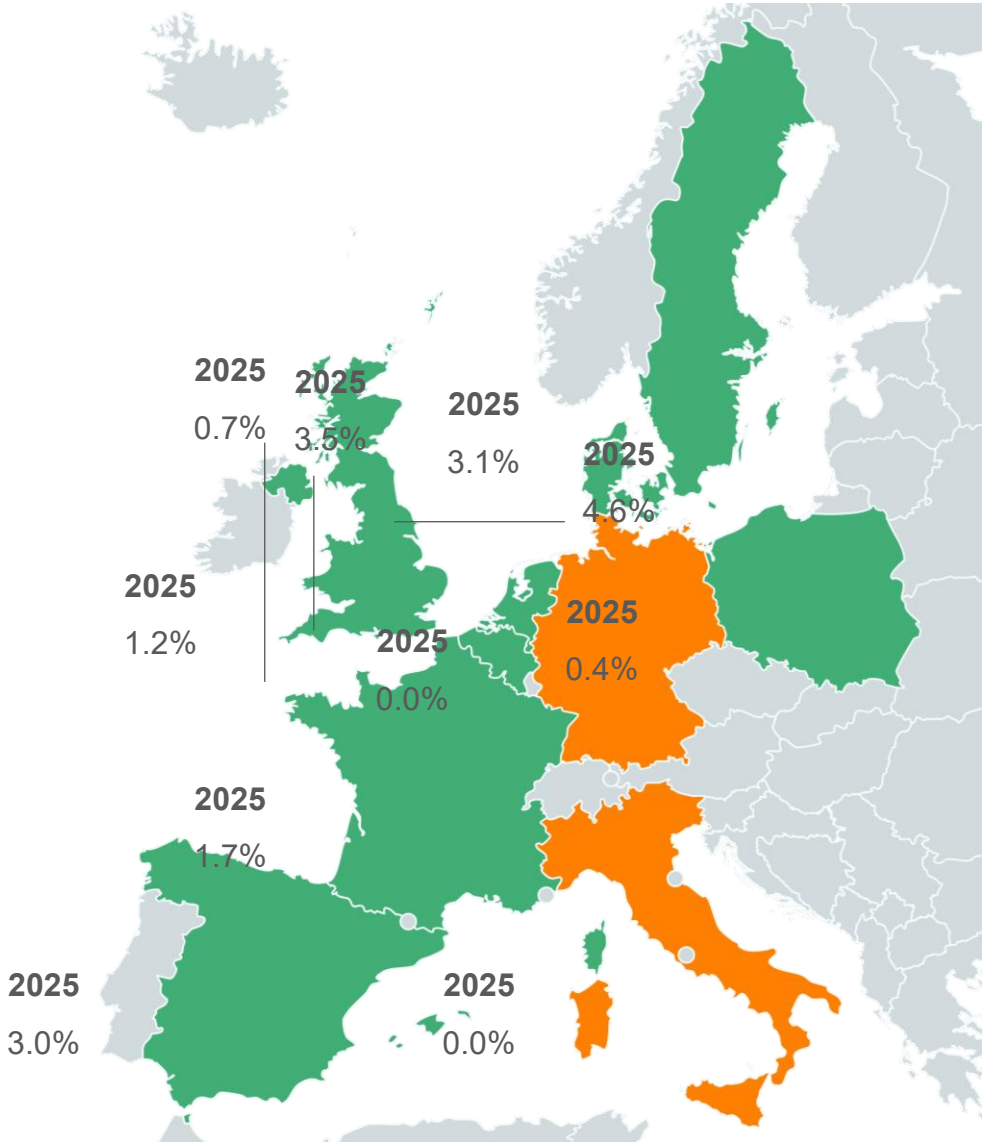
1. How many employees (in FTE) does your company currently have, including yourself? [if less than 2 FTE, end of research]
2. As an architectural firm, are you mostly active in the segment housing, non-residential building, interior, or landscaping? [If interior or landscaping, end of research]
3. What 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.

Also, the share of architects experiencing cancelled projects remains high in the United Kingdom. France has a relatively high share of architects experiencing this as well.

Construction volumes 2025 European overview

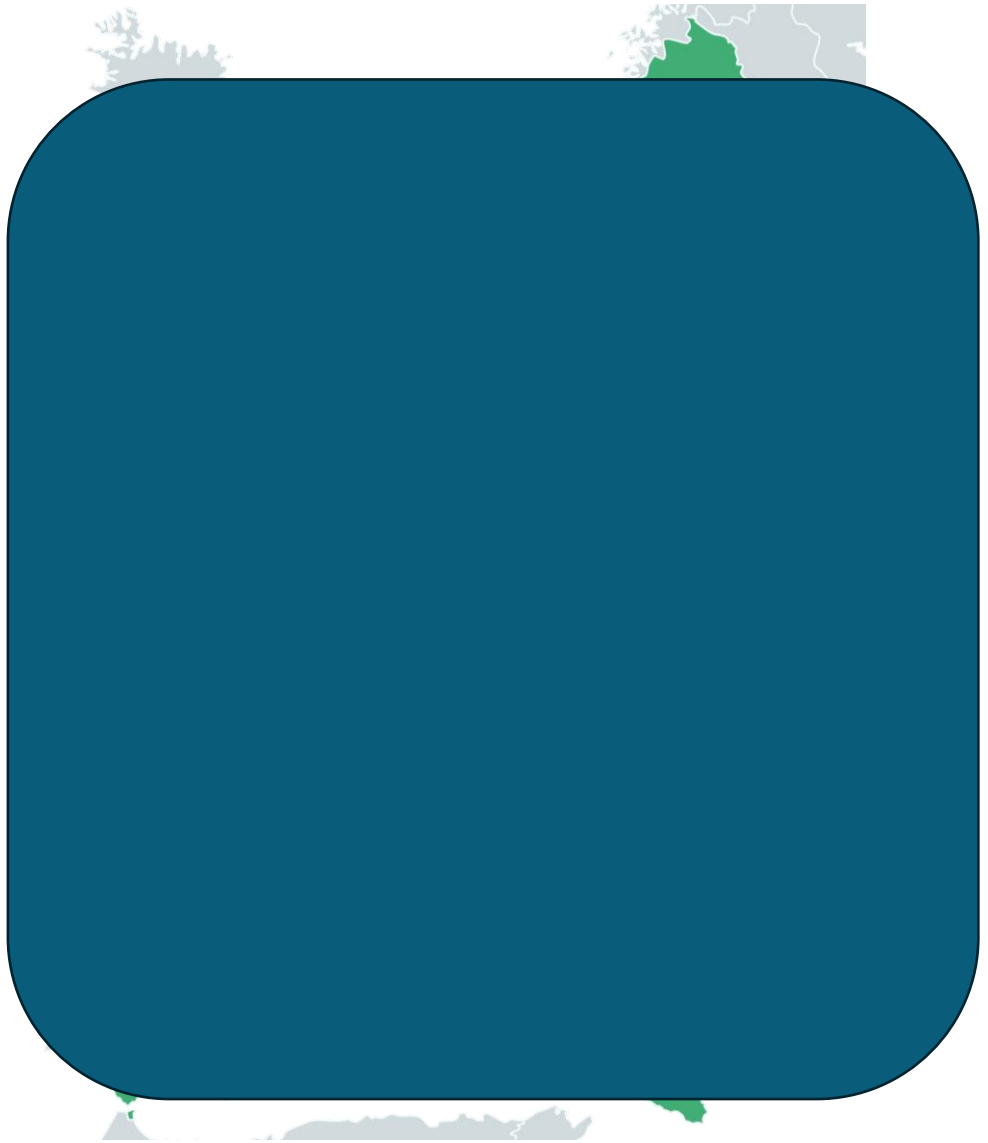
- The developments in 2025 ….



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

Construction volumes 2026 European overview

- Many long-term indicators look promising, and …..



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

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Italy

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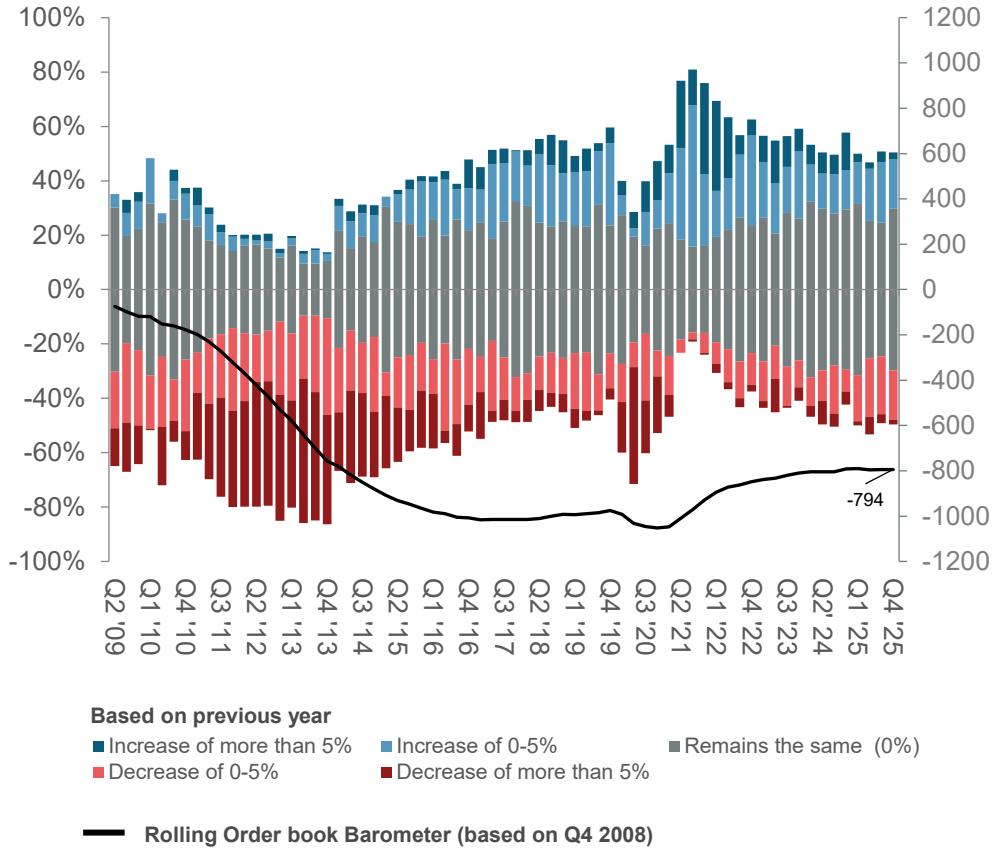
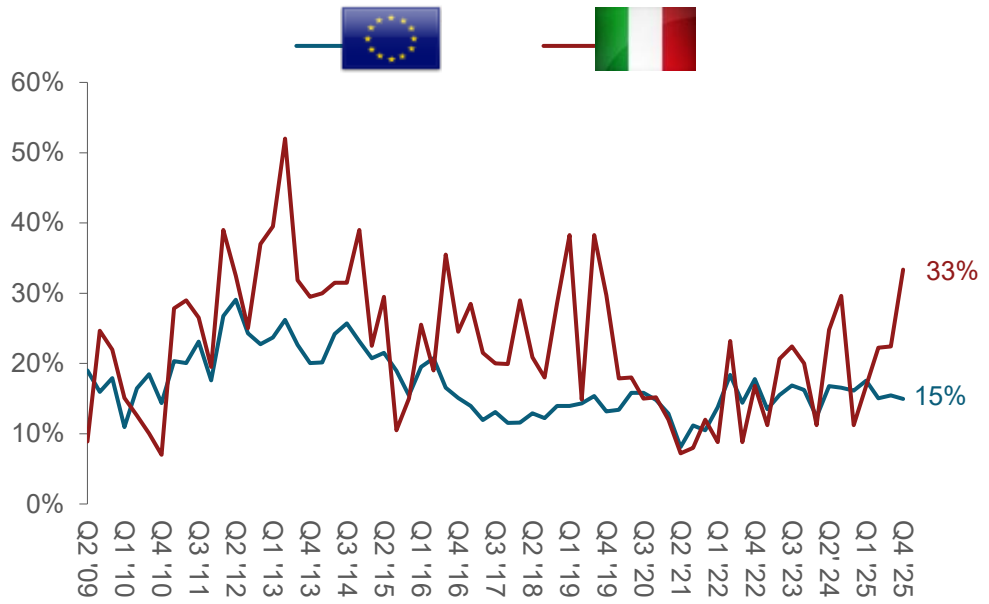
In Q3 2025, more Italian architects expected an empty order book in 12 months than the European average, and this increased further in Q4 ‘25. A third of Italian architects currently expect an empty order book in the next 12 months.

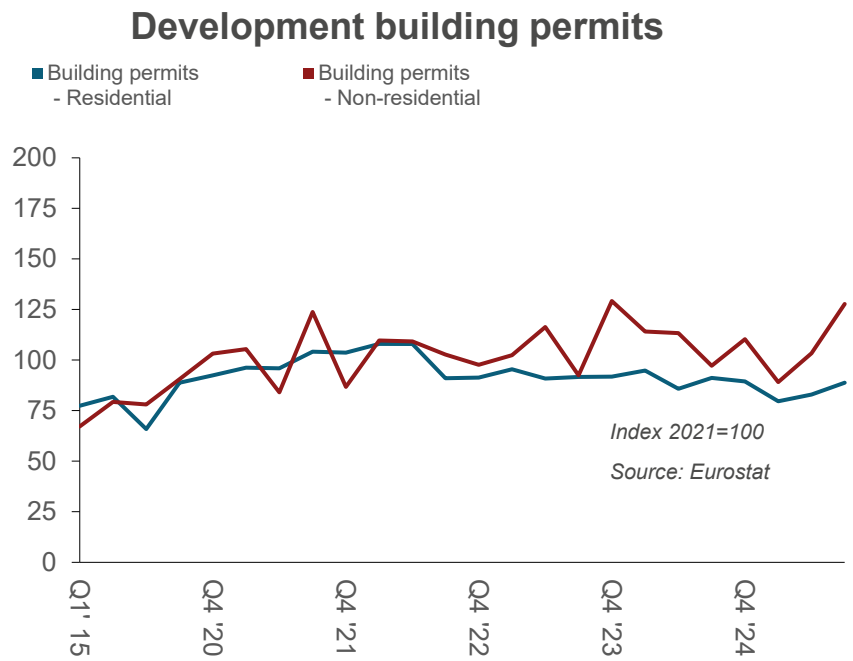
Development of order book



Expecting empty order book in 12 months



Italian indicators show mixed signals, but building permits are showing a positive development again which is a good sign.



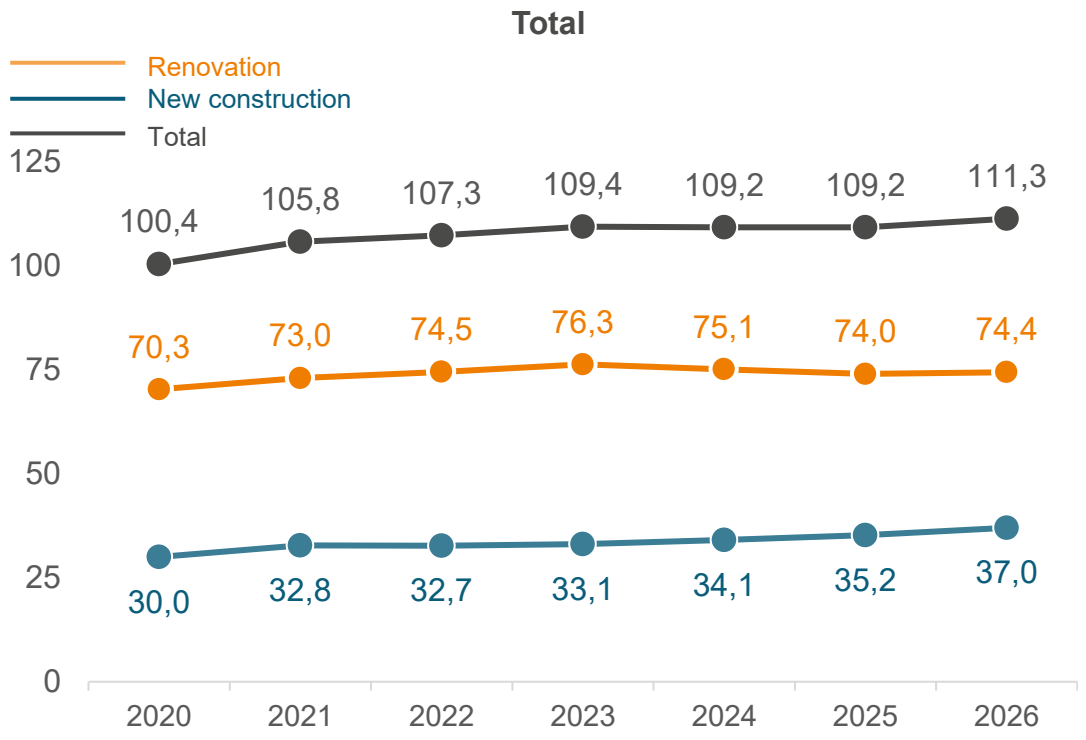
Economic and construction related indicators	Value Q4 2024	Value Q3 2025	Value Q4 2025	Q-2-Q development
GDP (quarterly growth rate) (%)*	0.0	0.1	0.3	Positive
Consumer confidence indicator**	-14.8	-16.5	-16.1	Positive
Industrial confidence indicator**	-9.1	-7.5	-6.2	Positive
Construction confidence indicator**	4.0	2.2	4.1	Neutral
Production value buildings (index 2021=100)**	138.6	134.5	158.1	Positive
Architects with postponed projects (%)***	44	33	47	Positive
Architects with cancelled projects (%)***	19	19	16	Neutral
Building permits residential (index 2021=100)**	89.5	88.8	n/a	Positive
Building permits non-residential (index 2021=100)**	110.4	127.7	n/a	Positive

*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)



% change in total output	**-7,7**	**5,4**	**1,4**	**2,0**	**-0,2**	**0,0**	**2,0**

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New digital tools (AI)

BIM

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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

1

AI is ….

2

Management summary - BIM

1

BIM adoption is structurally expanding, but with clear growth headroom.

BIM

2

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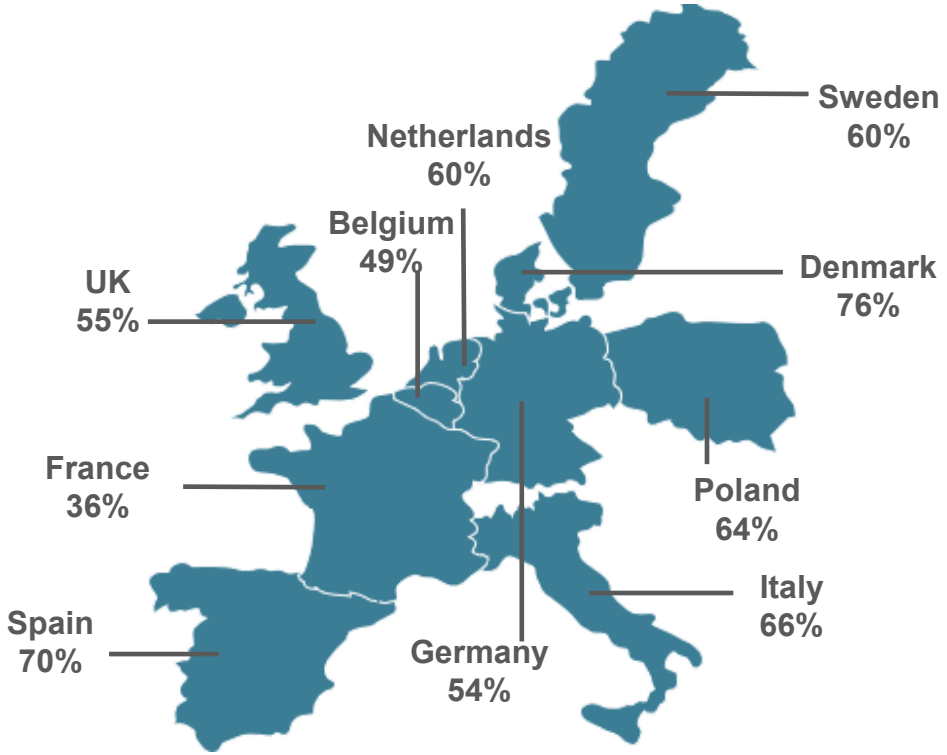
AI experimentation has become mainstream among European architects, but adoption levels differ substantially between countries.

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

Total = 59%



Usage of AI tools is more common among younger architects (18-34 years old).

AI adoption increases with company size, with larger companies showing higher usage levels.

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.

USP

[redacted] clearly dominates AI usage among European architects and has become the default entry point for AI in the design process.

[redacted]

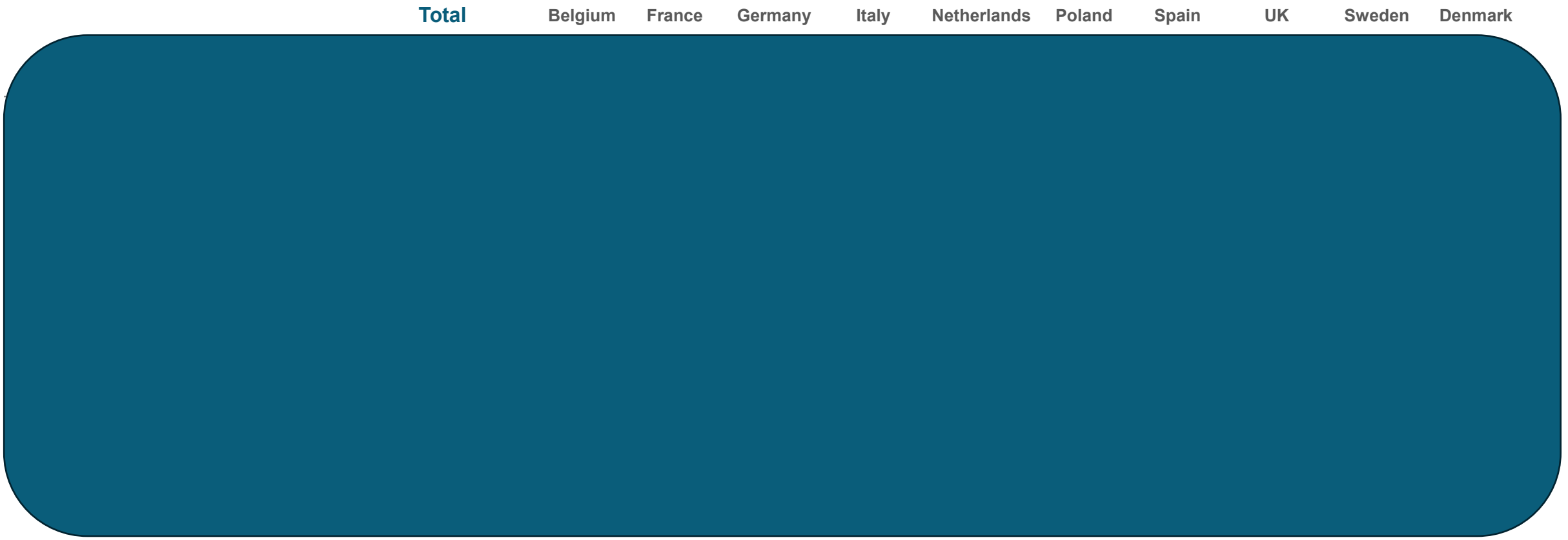
AI tools used – Top 10
Which AI tools do you use in your design process?

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.

Architects primarily apply AI in [redacted] related tasks.

[redacted] are emerging but remain fragmented across countries, [redacted]

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



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.

[redacted] of European architects currently experience tangible time savings in modelling.

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.

AI appears to [redacted], with most architects experiencing [redacted]

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.

The biggest obstacle [redacted] architects remain unc[redacted]

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 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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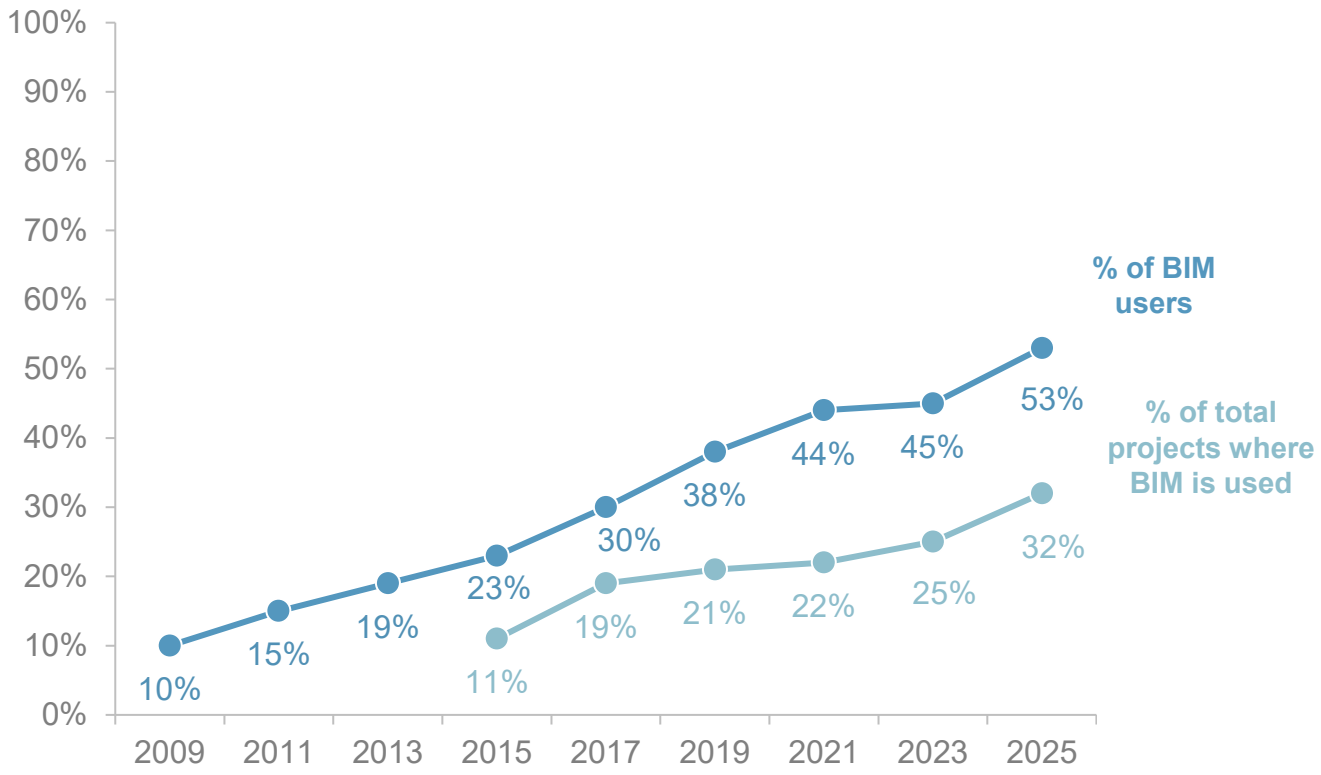
BIM has evolved from a niche methodology into a mainstream standard, with both user penetration and project integration steadily increasing over time.

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



Usage of BIM tools is less common among older architects (55+ years old).

BIM usage follows a similar pattern to AI usage, with larger companies showing higher adoption levels.

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

The BIM landscape is far from uniform: some countries demonstrate near-saturation levels of adoption, whereas others are still in a mid-transition phase.

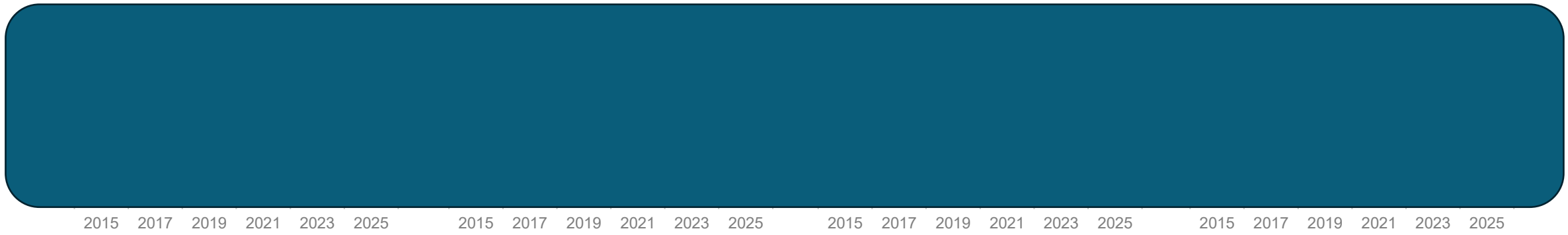
BIM usage by country

BIM usage – ranking of the countries

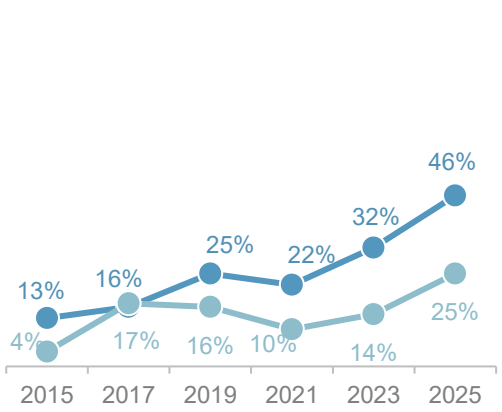
Belgium N=100; France N=125; Germany N=125; Italy N=126; Netherlands N=100; Poland N=100; Spain N=125; UK N=125; Sweden N=75; Denmark N=75.

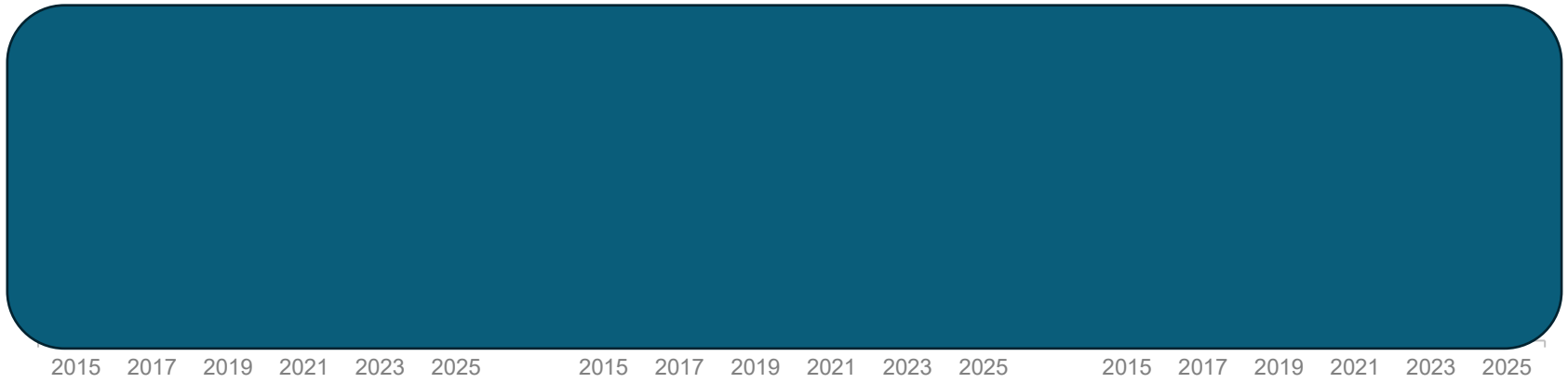
BIM adoption has increased across all major European markets, but at different speeds.

UK	Germany	France	Spain



Italy	Netherlands	Belgium	Poland





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: Denmark and Sweden were measured for the first time in 2025, they do not have historical data available.

USP

BIM is increasingly embedded in architects' business models, with a growing share of turnover now generated through BIM-based projects.

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

	2025	2023	2021	2019
Total	**56%**	**52%**	**49%**	**47%**

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.

BIM implementation among users dates back several years, and with non-users planning to start relatively soon, the methodology continues to expand at a measured pace.

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

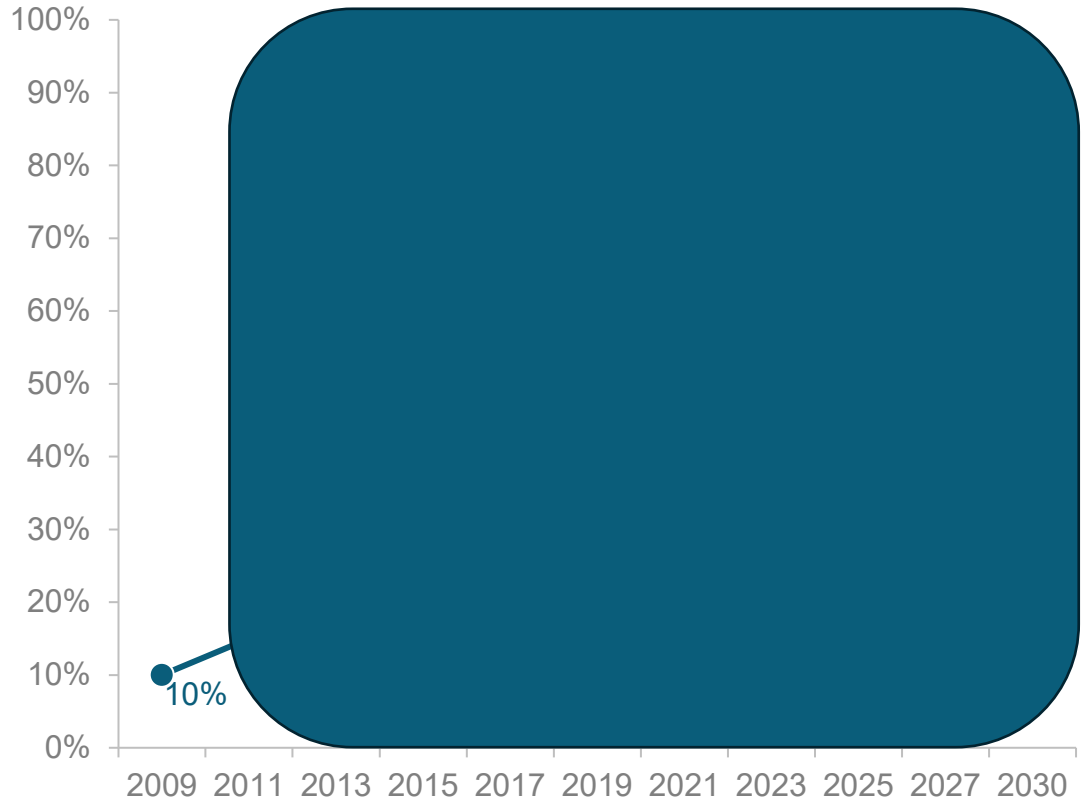
*Question was asked only to respondents who are already using BIM

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

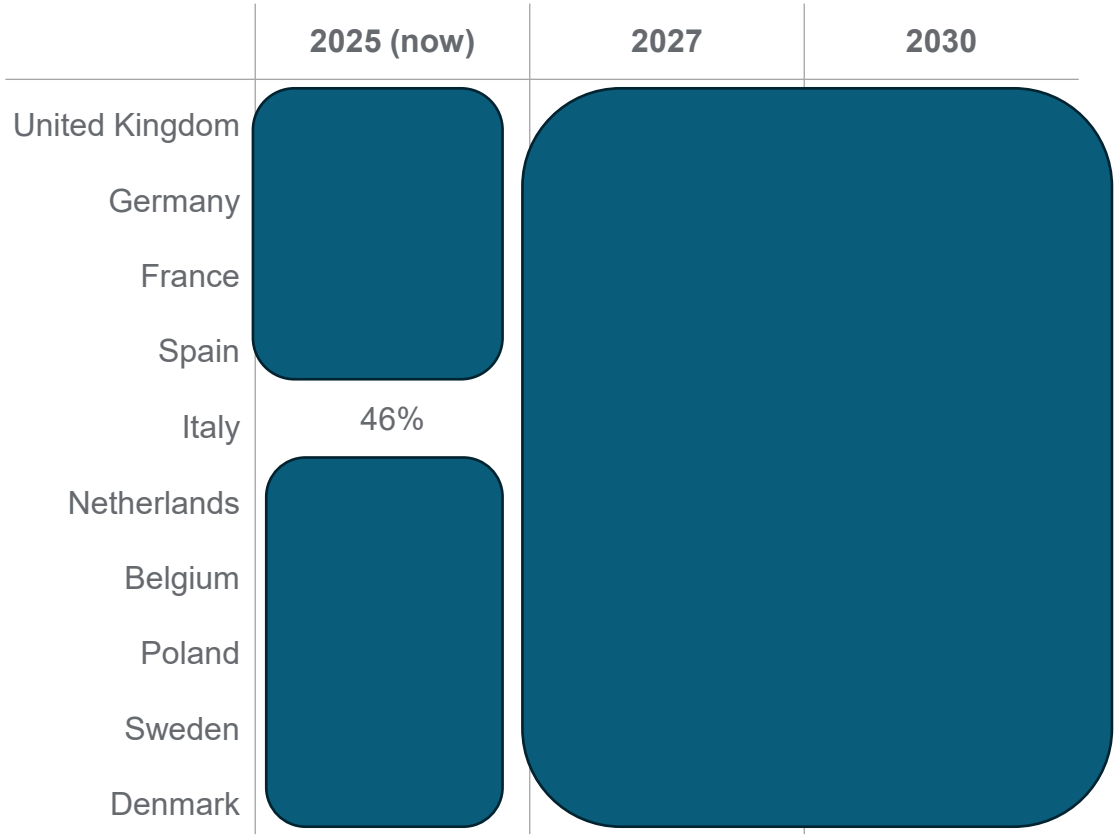
Started using BIM - Total N=601; Belgium N=48; France N=44; Germany N=47; Italy N=62; Netherlands N=19; Poland N=32; Spain N=62; UK N=53; Sweden N=5; Denmark N=13
Plans to start using BIM - Total N=385; Belgium N=49; France N=71; Germany N=53; Italy N=58; Netherlands N=76; Poland N=51; Spain N=62; UK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

Based on stated adoption plans, BIM usage is expected to

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



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).

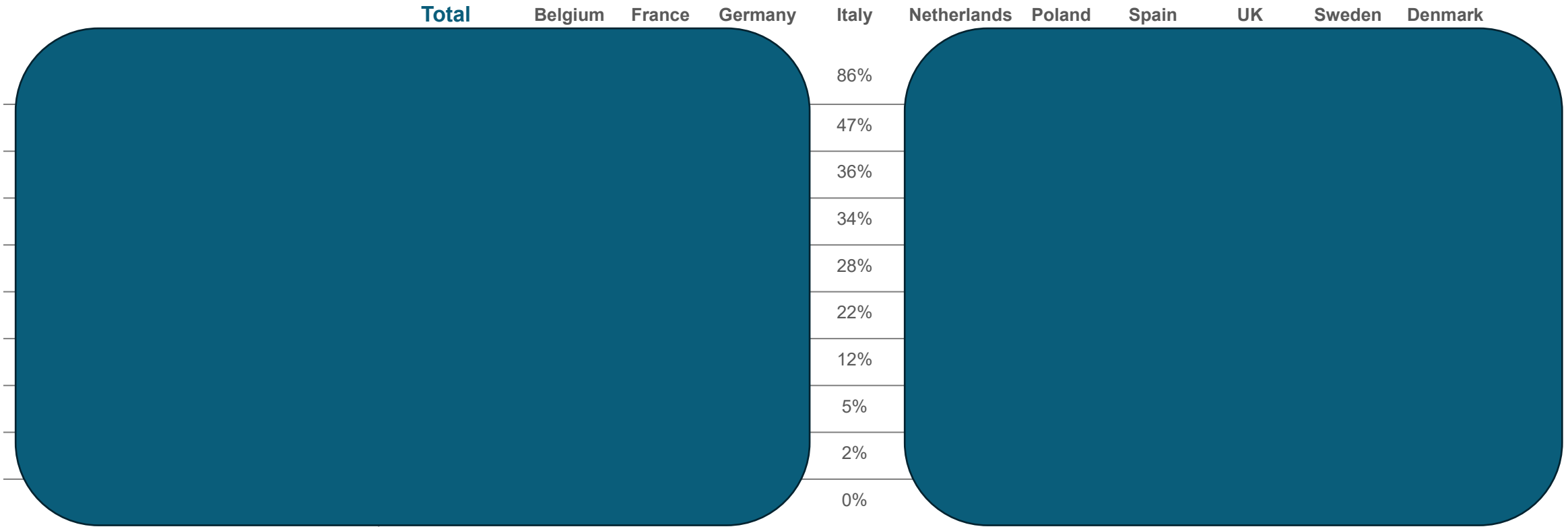
Non-adoption of BIM is primarily driven by scepticism about its benefits rather than by technical limitations, indicating that conviction and demand are key to further uptake.

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

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.*

BIM is primarily used for
materials, equipment an
functionalities are applie

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



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.

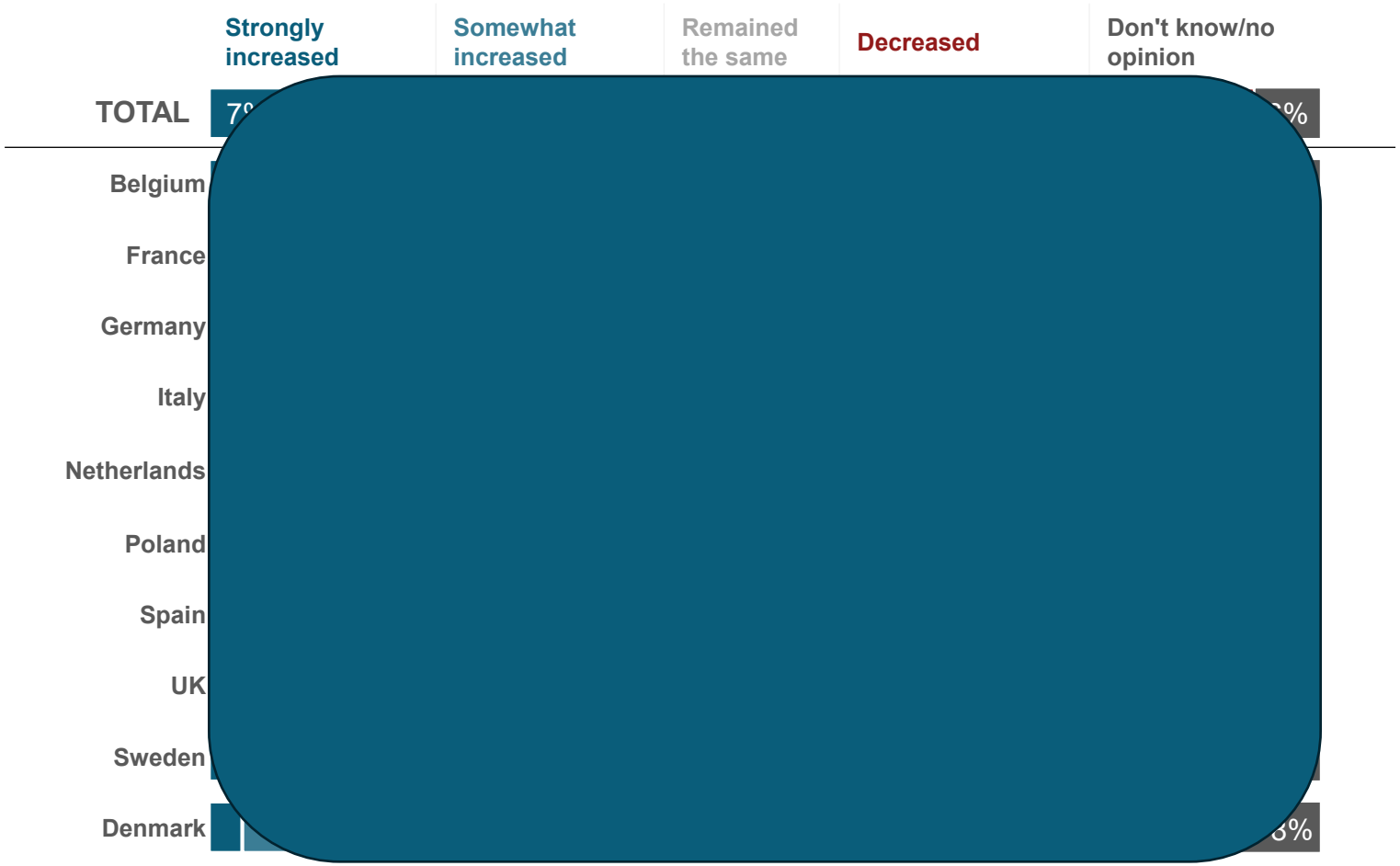
BIM software usage is highly concentrated around [redacted] or country-specific choices.

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

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.

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.

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.

File exchange in BIM projects is rarely completely problem-free, with most architects

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.

The most commonly reported file related issues are associated with seamless collaboration.

File formats causing issues

Which file formats cause the most issues in your projects?

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.*

The BIM object landscape is highly fragmented, with usage spread

BIM platforms and libraries

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

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.

Architects prioritise [redacted] sustainability data in BIM, while [redacted] play a more supporting role.

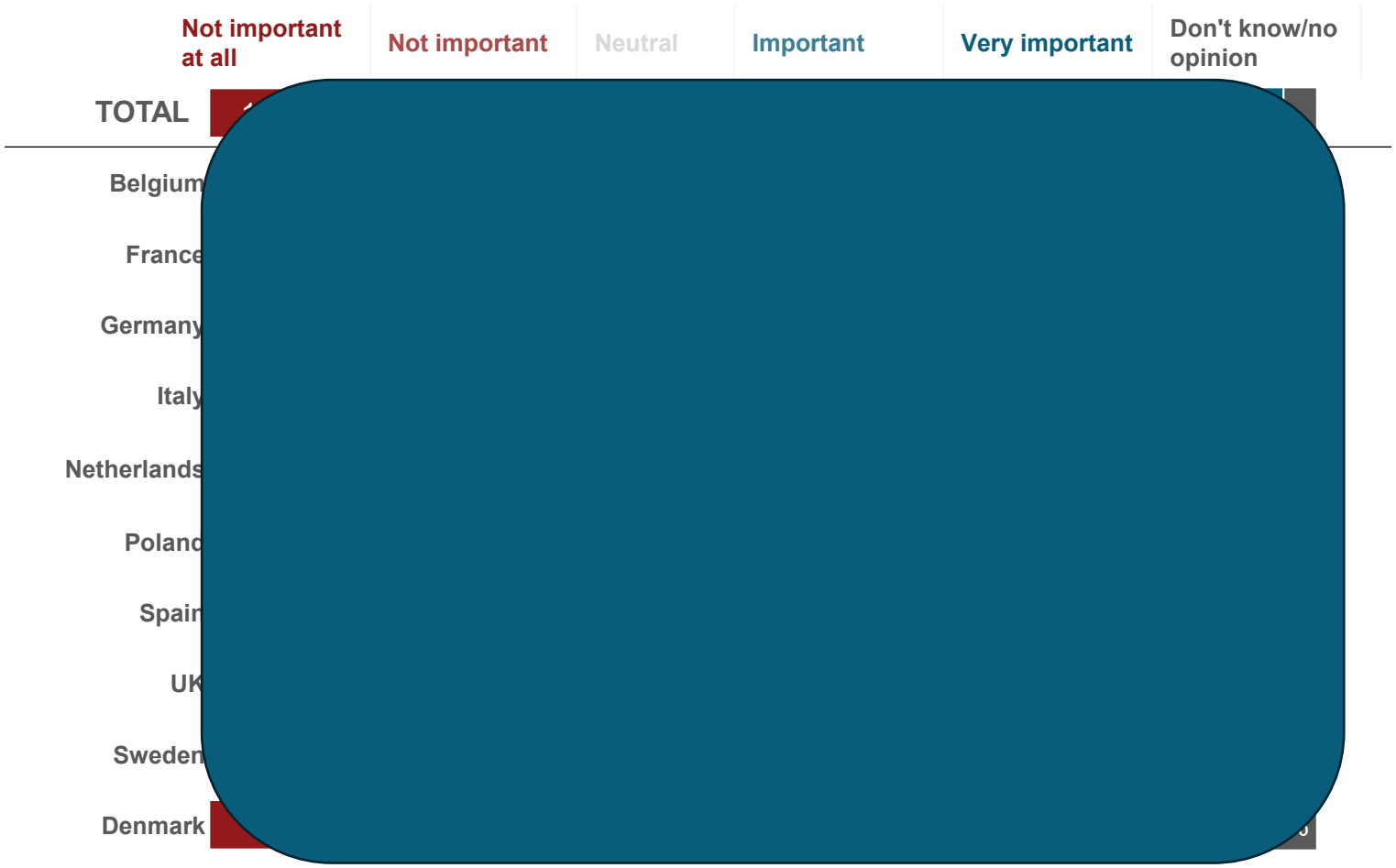
Sustainability data within BIM
Which types of sustainability data are most useful to you?

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.

Environmental data is increasingly valued within BIM objects, suggesting that sustainability attributes are evolving into a standard component of digital product information.

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.

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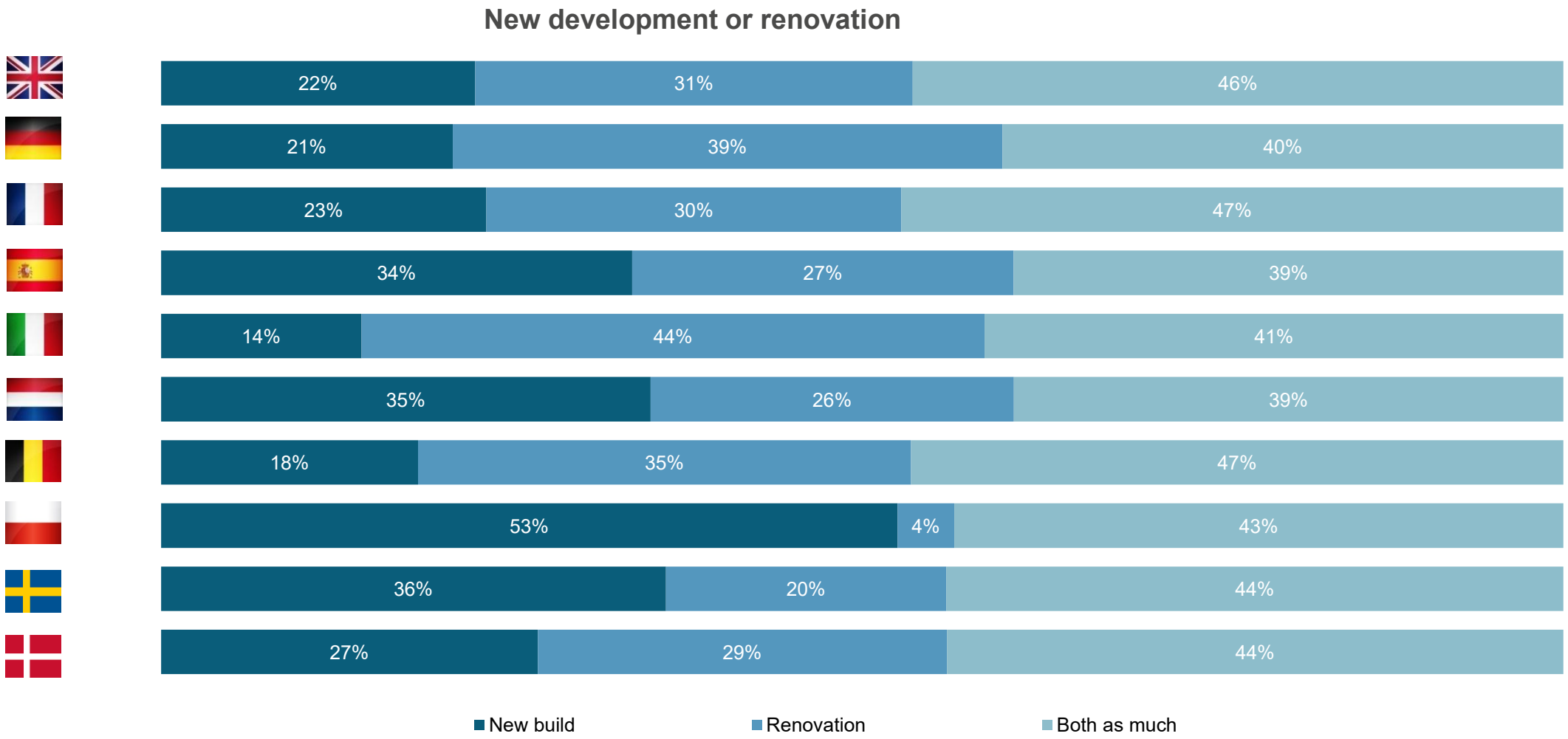
Background of the architects

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



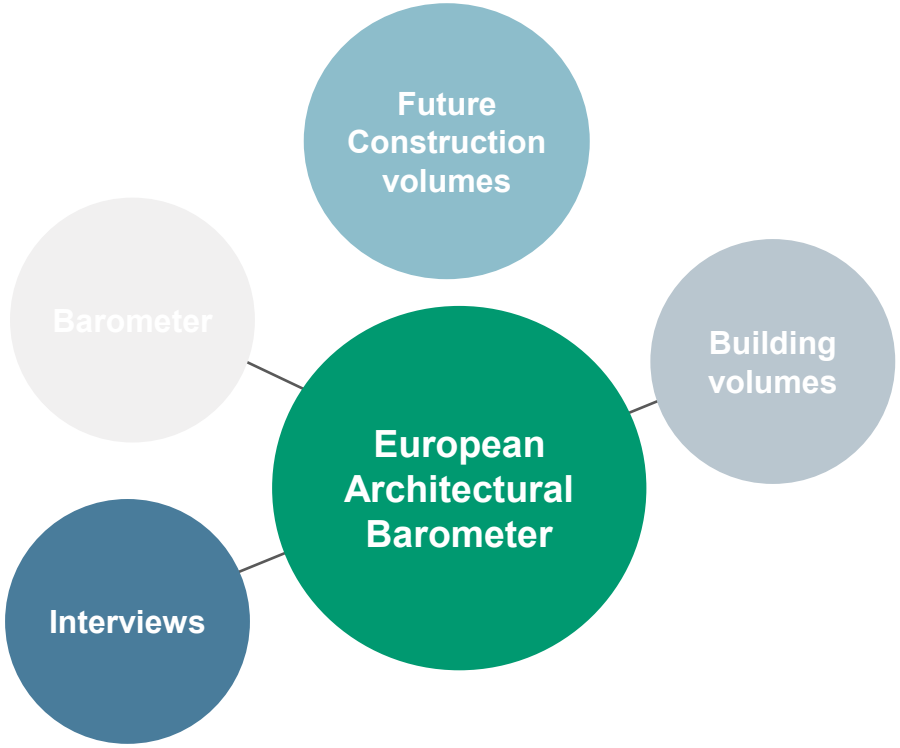
About European Architectural Barometer

European Architectural Barometer

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

Interviews

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



Future construction volumes

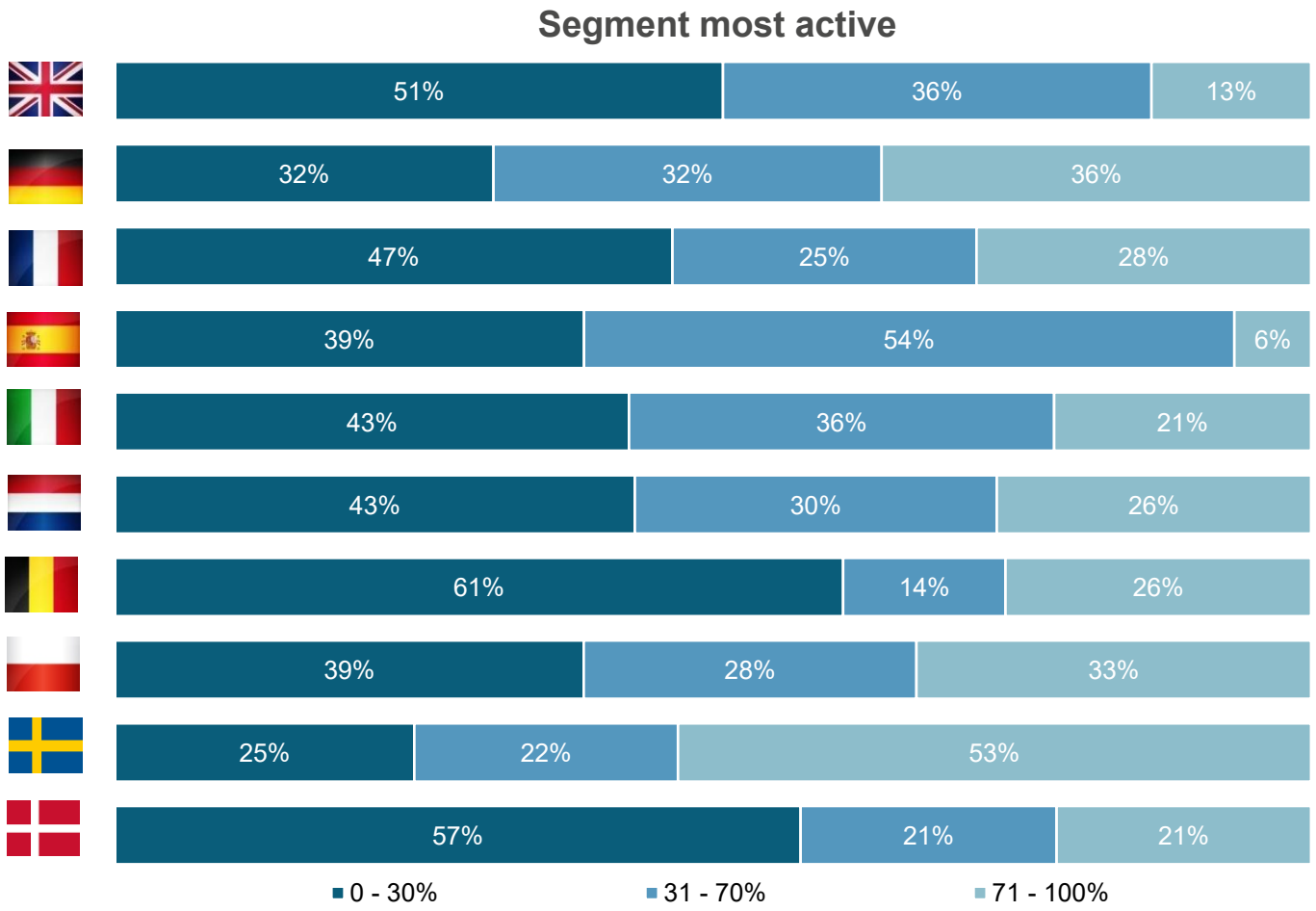
For decision makers charged with considerations of company resources, staffing and marketing strategy, a clear insight into future construction volumes is essential. However, economic indicators seldom provide an adequate picture of these volumes.

Building volumes

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

Results per segment

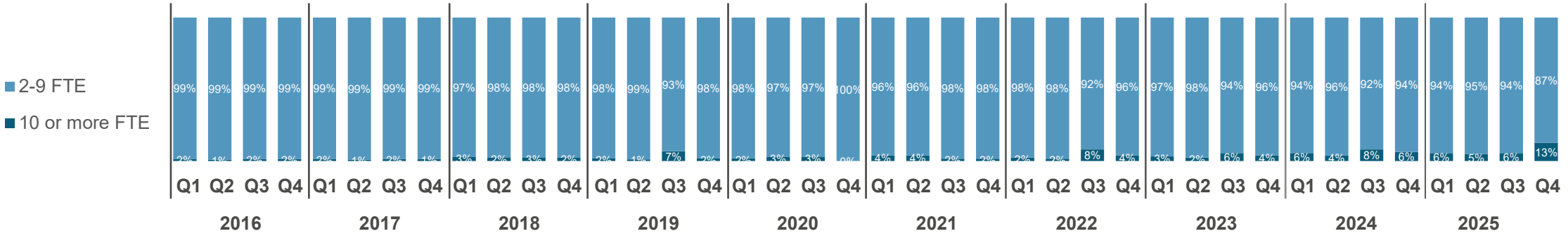
For three key questions from the current measurement of the European Architectural Barometer, the results are divided by architects that realise most of their sales in the residential segment (0% – 30% non-residential), by architects that realise sales in both segments (31% - 70% non-residential), and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

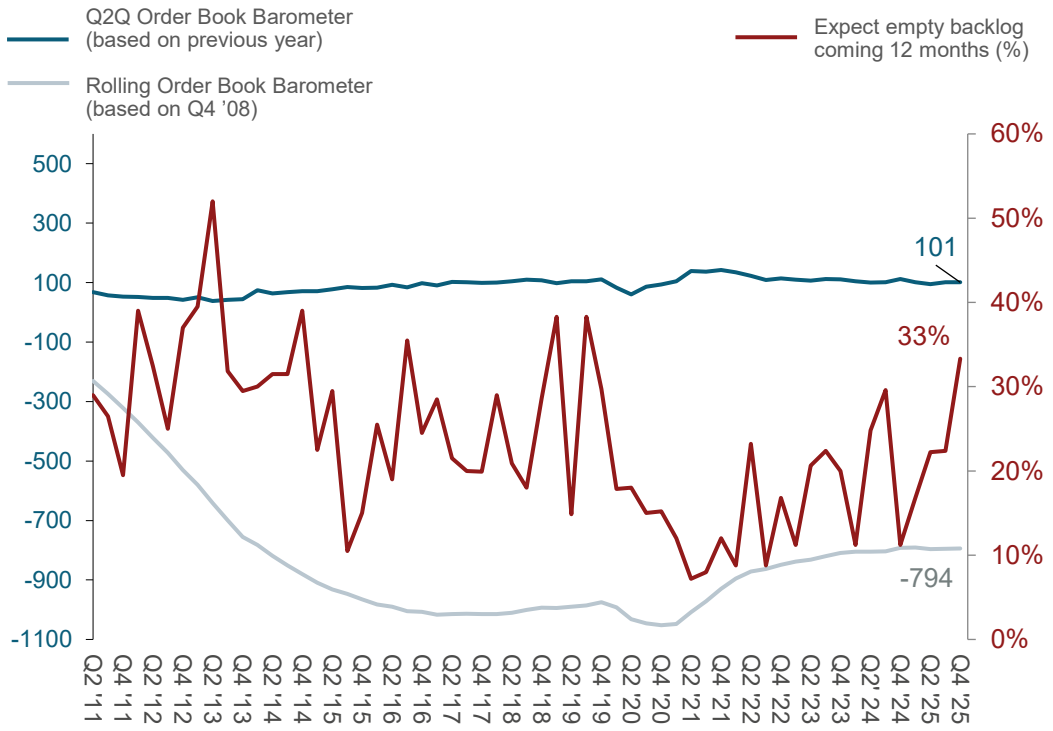


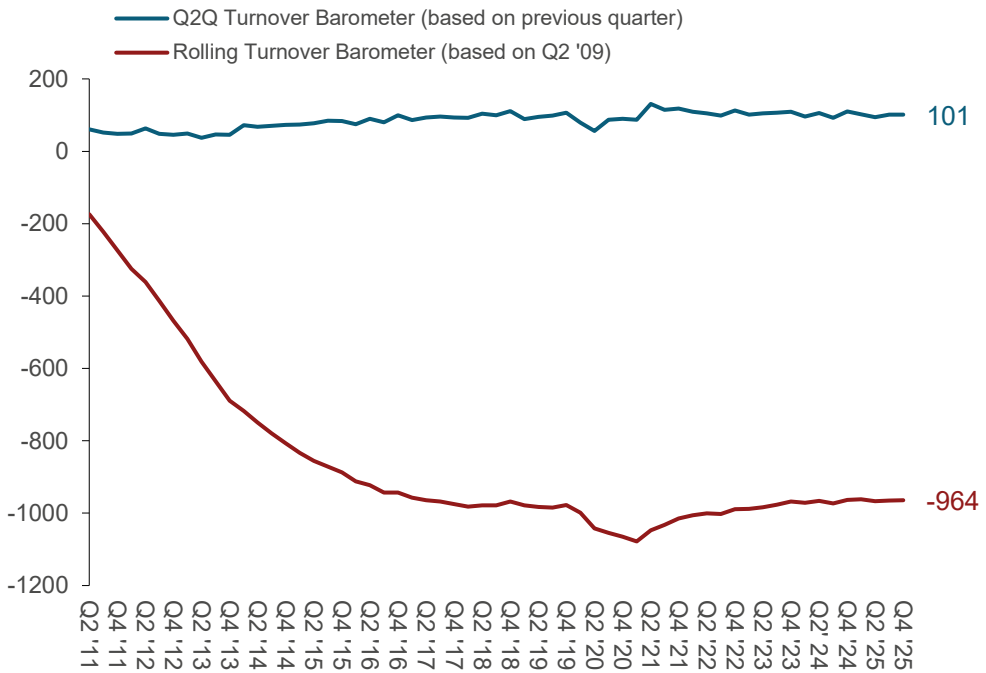
The tables on the following pages show the above-mentioned split with regard to the following questions:

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

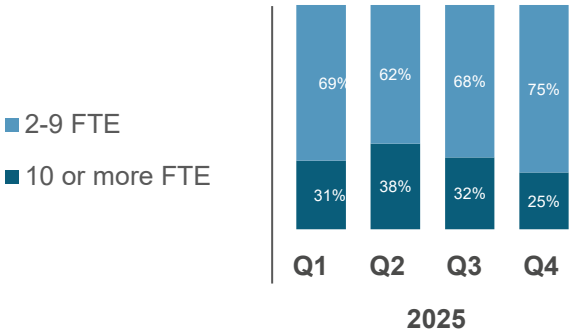
Short-term outlook among Italian architects

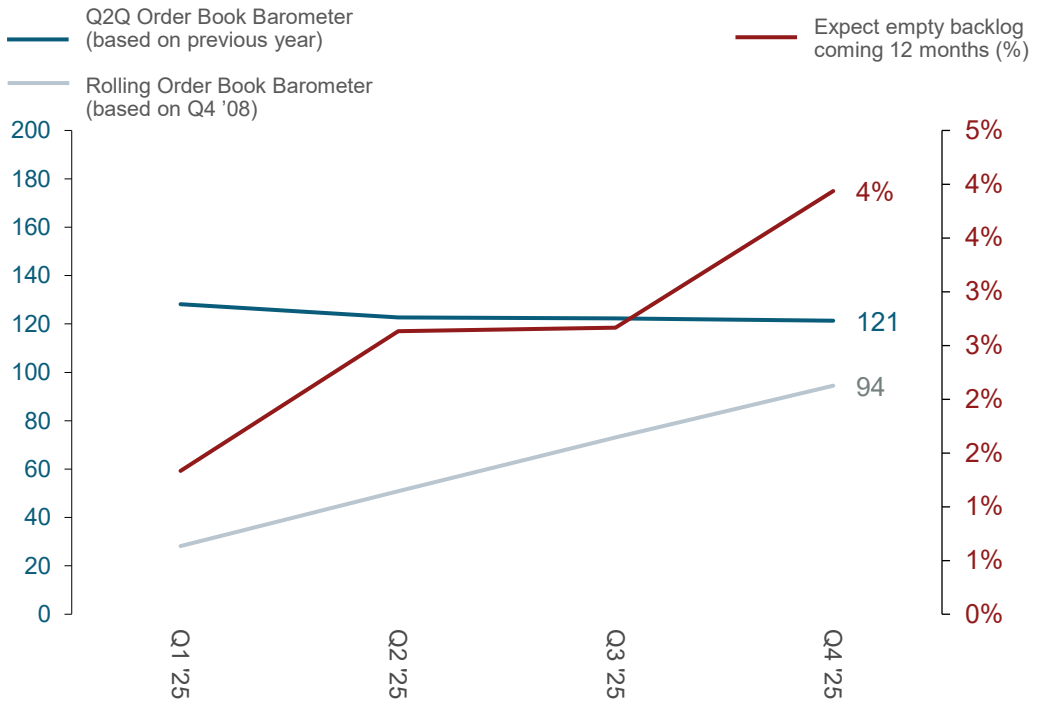


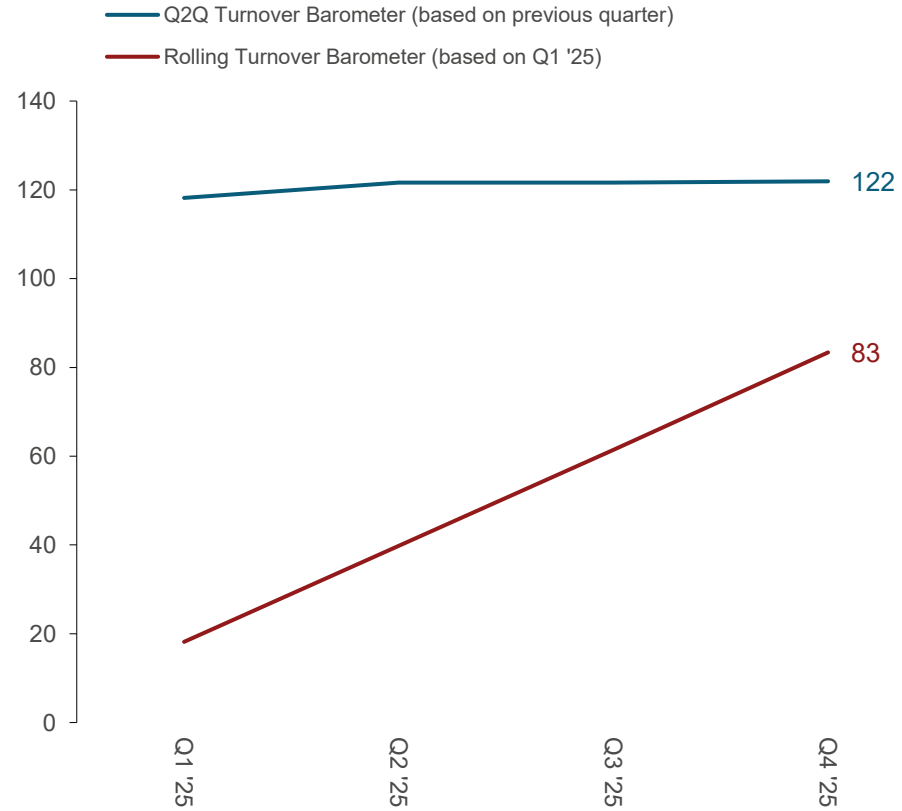




Short-term outlook among Danish architects







Development turnover and order book

Development turnover
(based on previous quarter)

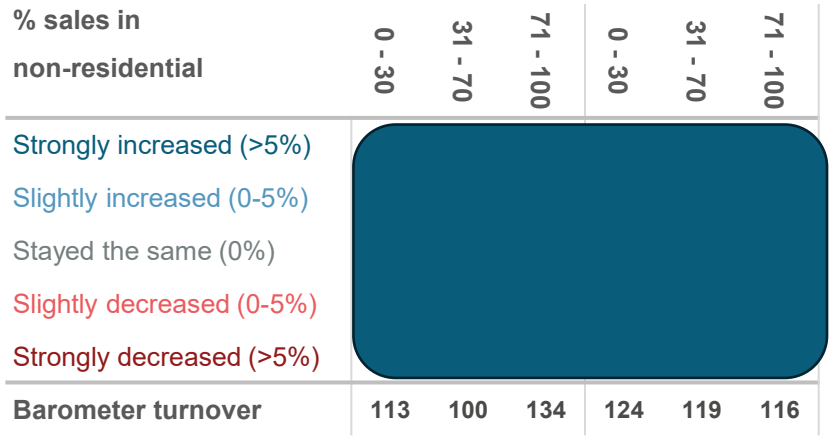
% sales in non-residential	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100
Strongly increased (>5%)																								
Slightly increased (0-5%)																								
Stayed the same (0%)																								
Slightly decreased (0-5%)																								
Strongly decreased (>5%)																								
Barometer turnover	**97**	**90**	**165**	**106**	**110**	**96**	**93**	**95**	**77**	**123**	**118**	**125**	**98**	**98**	**113**	**131**	**117**	**112**	**112**	**109**	**101**	**99**	**98**	**86**

Development order book
(based on previous year)

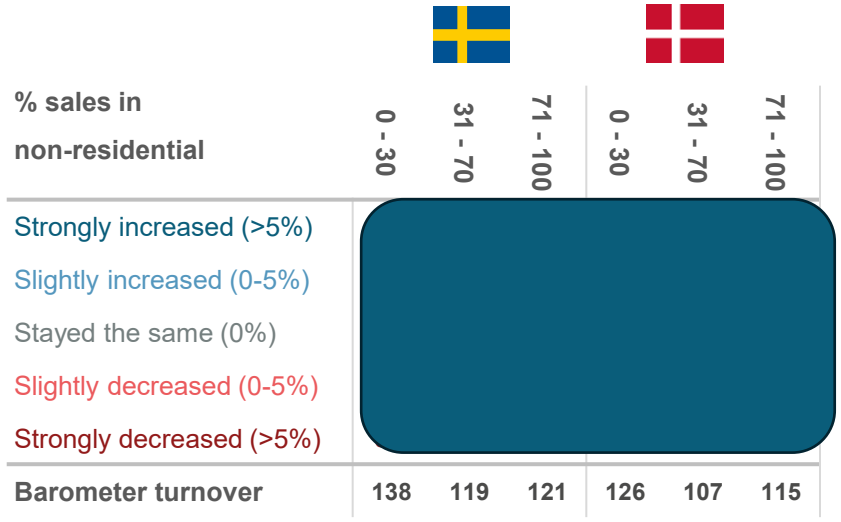
% sales in non-residential	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100
Strongly increased (>5%)													0%	5%	4%									
Slightly increased (0-5%)													16%	12%	32%									
Stayed the same (0%)													61%	61%	56%									
Slightly decreased (0-5%)													22%	17%	8%									
Strongly decreased (>5%)													0%	5%	0%									
Barometer order book	**99**	**77**	**146**	**100**	**93**	**95**	**103**	**92**	**86**	**154**	**143**	**138**	**97**	**98**	**116**	**133**	**122**	**122**	**107**	**111**	**115**	**93**	**106**	**105**

Development turnover and order book

Development turnover
(based on previous quarter)



Development order book
(based on previous year)



Expectation empty order book in the next 12 months

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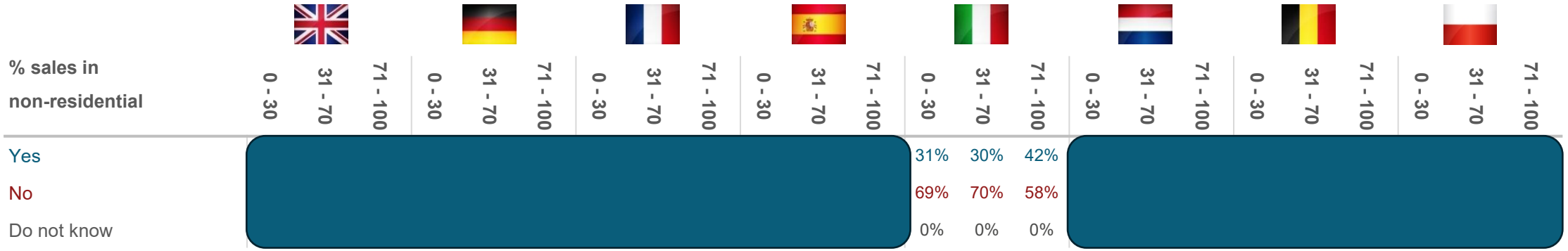
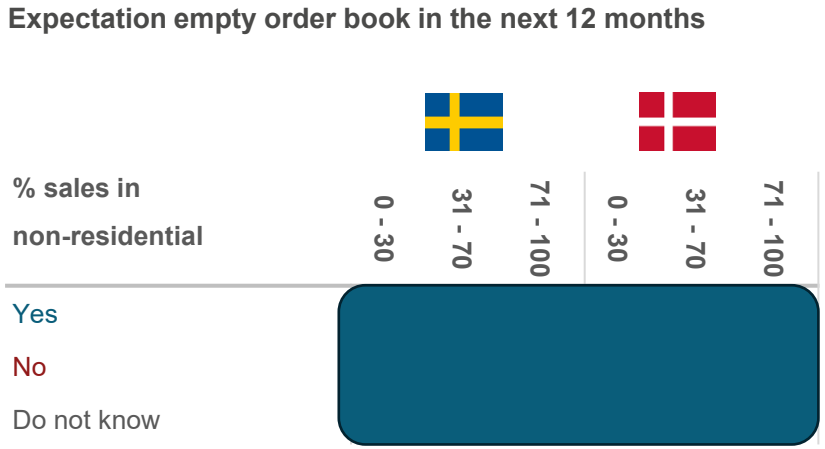


Expectation empty order book in the next 12 months



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%

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
Rolling Barometer Values	-29	-54	-54	-69	-69	-59	-65	-71	-60	-59	-65	**-66**

+ (-25) + (0) + (-15) + etc.

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

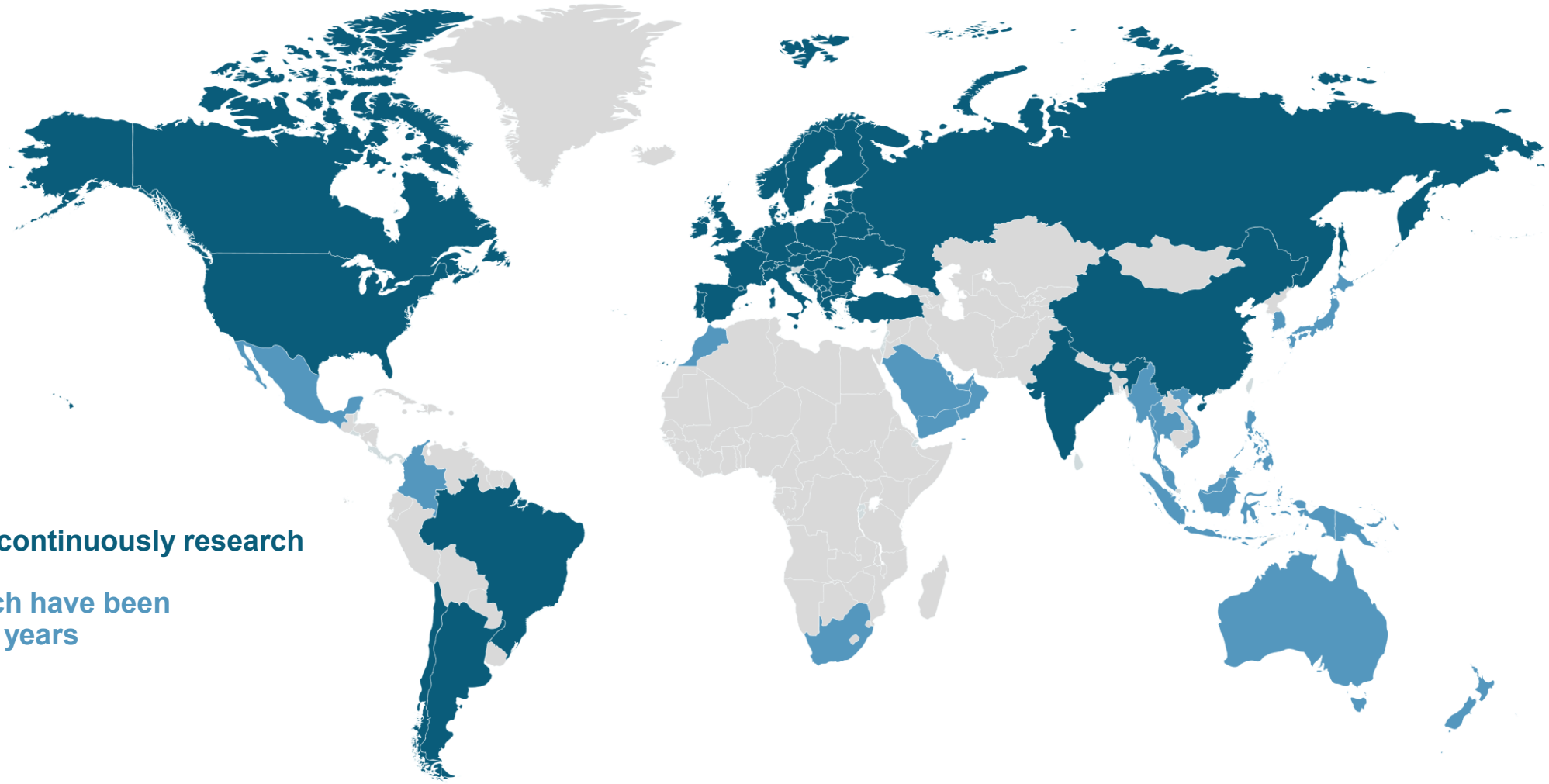
- Tailor made
- Driven by your information needs
- Advice & consultancy based on facts and over 25 years of experience in the industry
- Worldwide coverage
- B2B, B2C, qualitative and quantitive research or a combination of both
- Within our market specialism, all types of researches can be conducted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

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

Principals of USP

USP Marketing Consultancy

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