Report Impression
European Architectural Barometer Q4 2024

Smart materials and technologies
February 2025

a product by USP Marketing Consultancy

Index

About European Architectural Barometer

THE GOAL

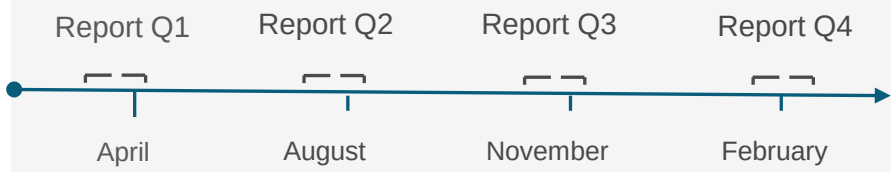
The objective of the European Architectural Barometer of USP Marketing Consultancy is to offer profound insight into the current economic situation and trends among architectural firms in the Netherlands, Germany, the UK, France, Spain, Italy, Belgium and Poland. The European Architectural Barometer 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 2024:
Q1: Trends in Material Usage
Q2: Future in Construction
Q3: Decision Making Process
Q4: Smart Materials and Buildings

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

Jeroen de Gruijl
Consultant

+31 6 83979041
deGruijl@usp-mc.nl

Matko Jurkovic
Research Analyst

jurkovic@usp-mc.nl

Dirk Hoogenboom
Research Consultant

+31 652098924
hoogenboom@usp-mc.nl

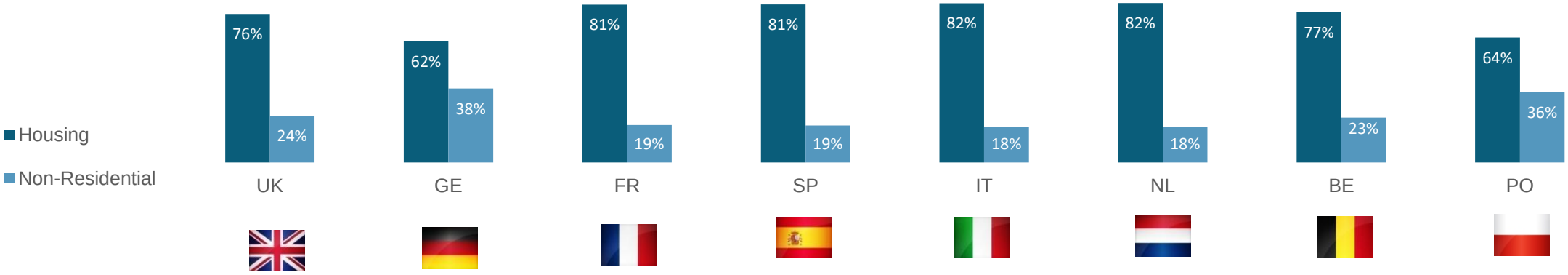
Background of the architects

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	**6.6**	**7.3**	**4.5**	**7.1**	**3.4**	**8.6**	**4.7**	**6.2**
2 – 4 FTE	52%	48%	69%	37%	83%	47%	53%	54%
5 – 9 FTE	32%	28%	23%	40%	11%	23%	18%	24%
10 – 19 FTE	10%	18%	7%	20%	5%	9%	13%	18%
20 – 39 FTE	4%	4%	2%	2%	1%	6%	2%	3%
> 40 FTE	2%	2%	0%	1%	0%	6%	0%	1%

Segment mostly active



Index

Research questions **Economic development**

THE METHODOLOGY TO PREDICT FUTURE BUILING VOLUMES

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. More information can be found in the appendix

THE RESEARCH QUESTIONS

- *Do you expect your order book will be empty in the coming 12 months?*
- *How many projects have been cancelled in the past quarter?*
- *How did your order book develop compared to the same quarter last year?*
- *Do you have postponed projects?*

(125)

OTHER USED AND REPORTED ECONOMIC INDICATORS

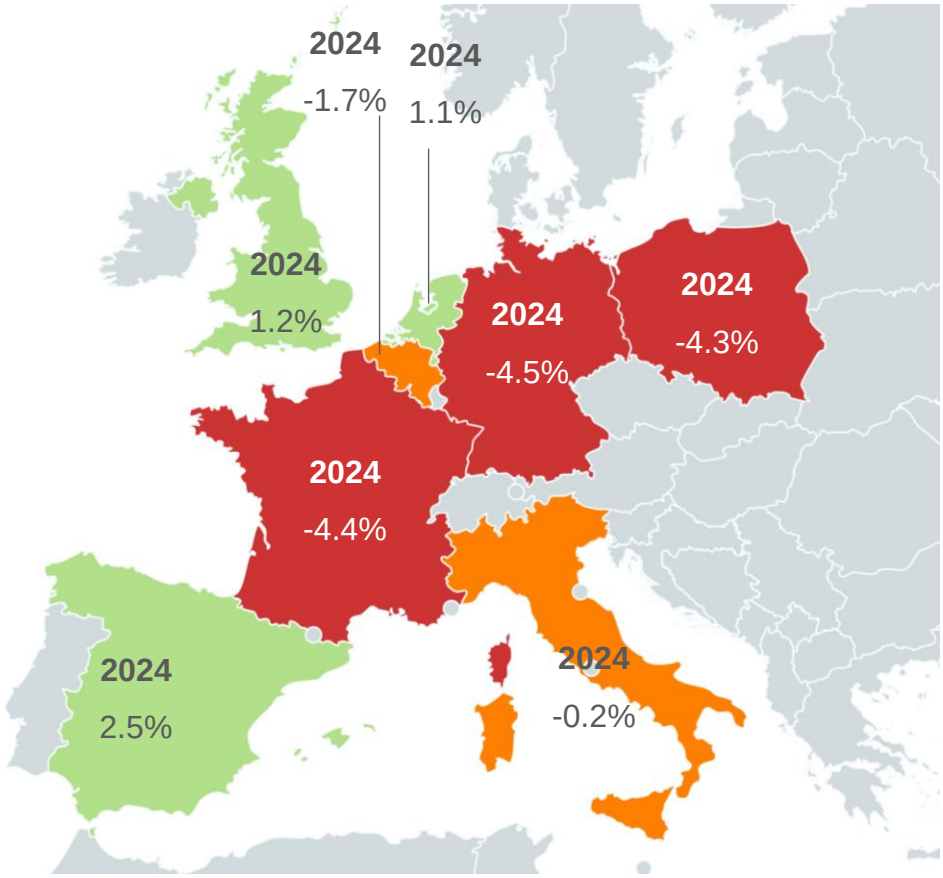
- GDP (quarterly growth rate) (%)
- Consumer confidence indicator
- Industrial confidence indicator
- Construction confidence indicator
- Production value buildings
- Building permits residential
- Building permits non-residential

An increasing number of Italian and French architects are expecting empty order books in the next twelve months.

Construction volumes 2024 European overview

- The developments in 2024 leads to a decline in building volumes in five out of eight countries. For three countries 2024 proved to be a positive year.

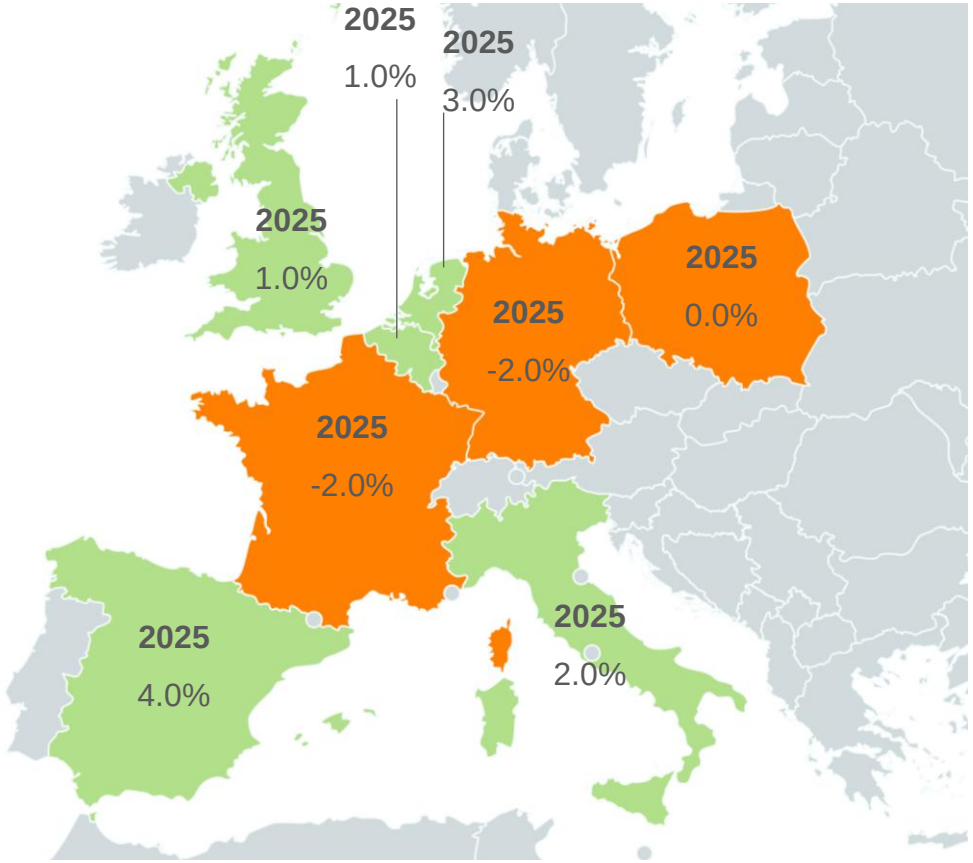
- This is mostly due to the negative development of long-term indicators such as the development of building permits. In many countries, this negative development has been going on for a longer period.



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

Construction volumes 2025 European overview

- Contrary to the expectations of three to four months ago, the growth figures are expected to be modest or even negative in 2025 as well.
- Many long-term indicators have worsened, leading to a more conservative prediction of the growth volumes for 2025.

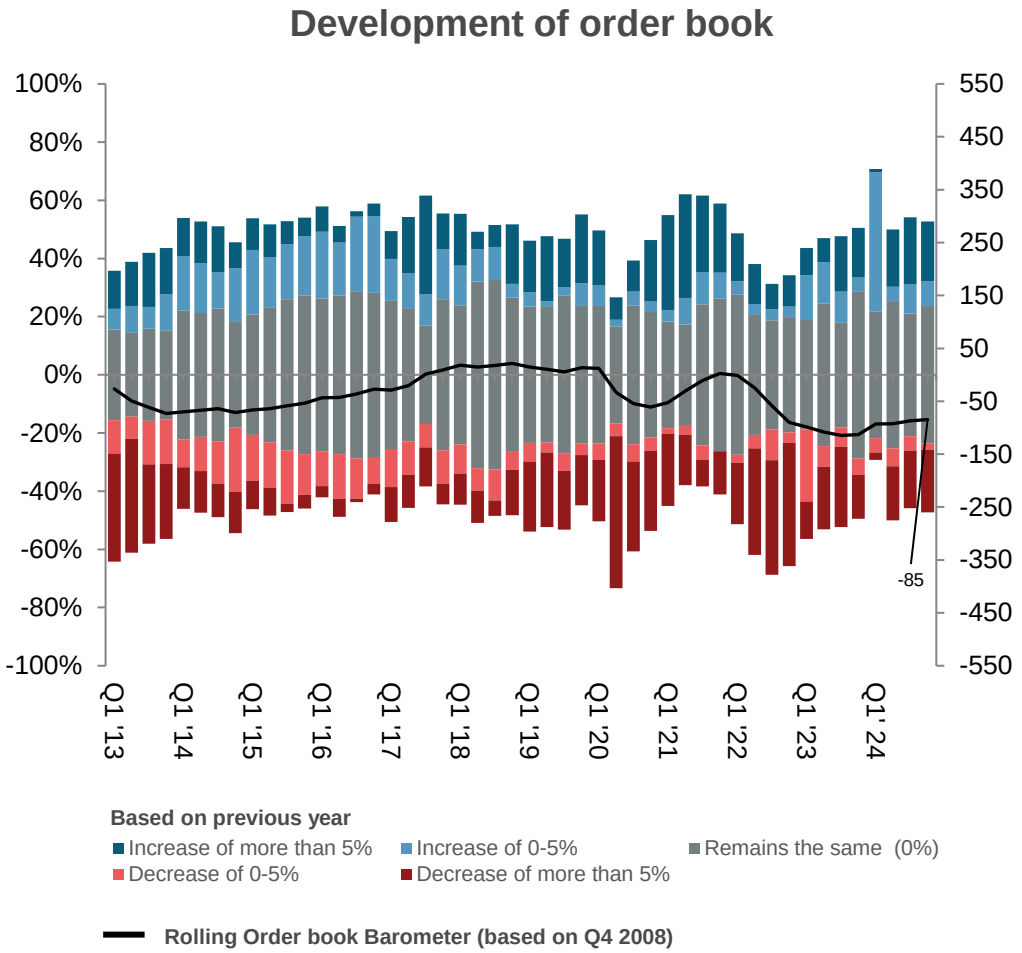


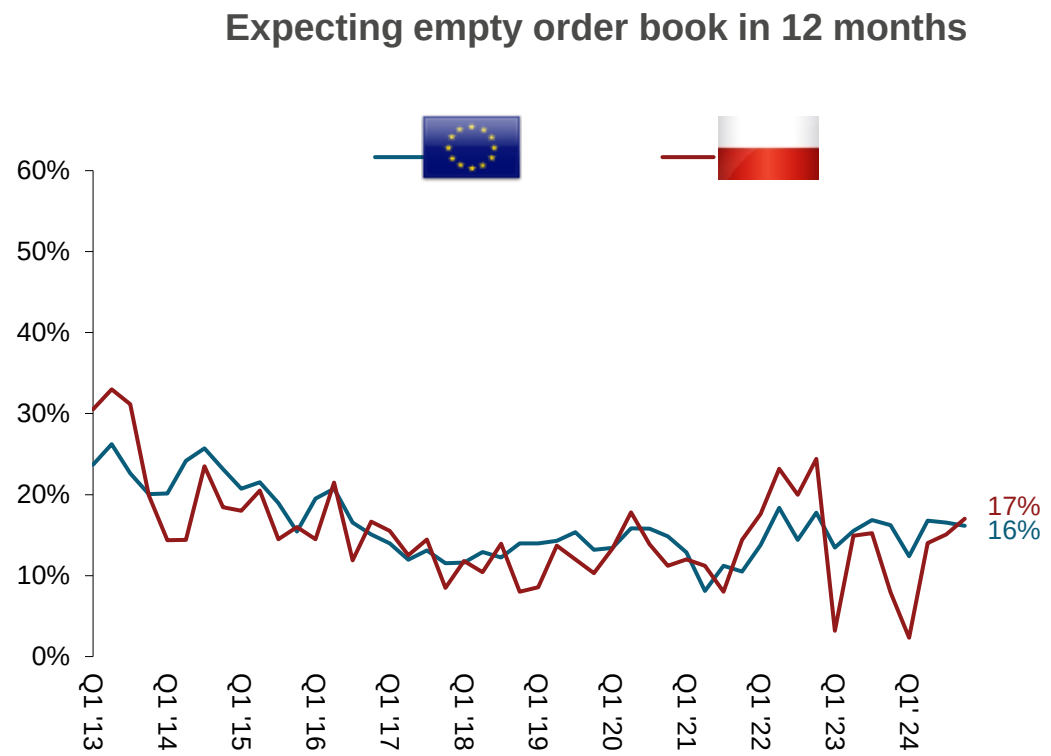
•See the country slides for more detailed information on the developments per construction segment.

•Volumes are in billion euros at 2013 prices.

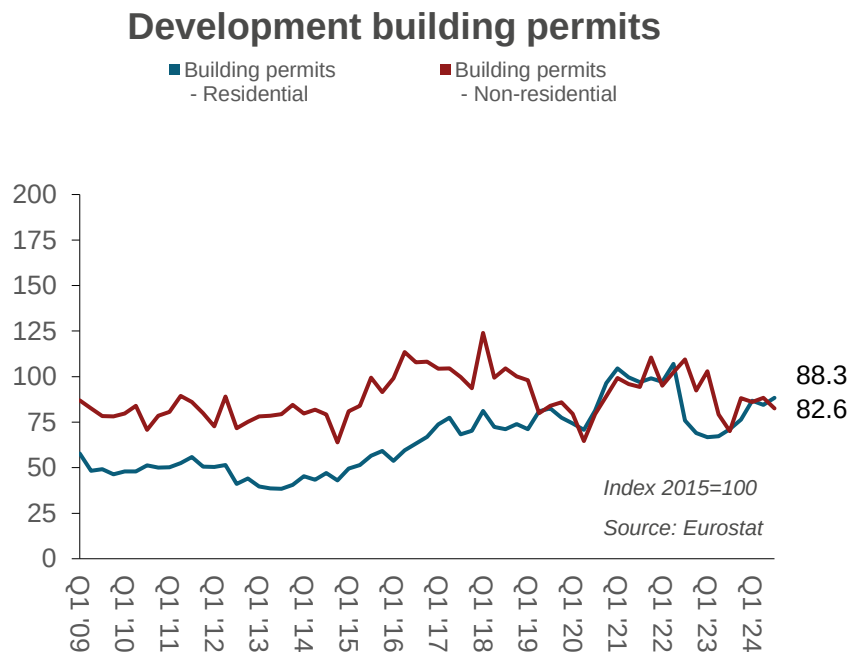
Index

Polish order books are volatile, an increasing number of architects report an empty order book expectation for the coming twelve months





The Polish building permits look more stable after many quarters, which is a positive sign for the Polish construction industry

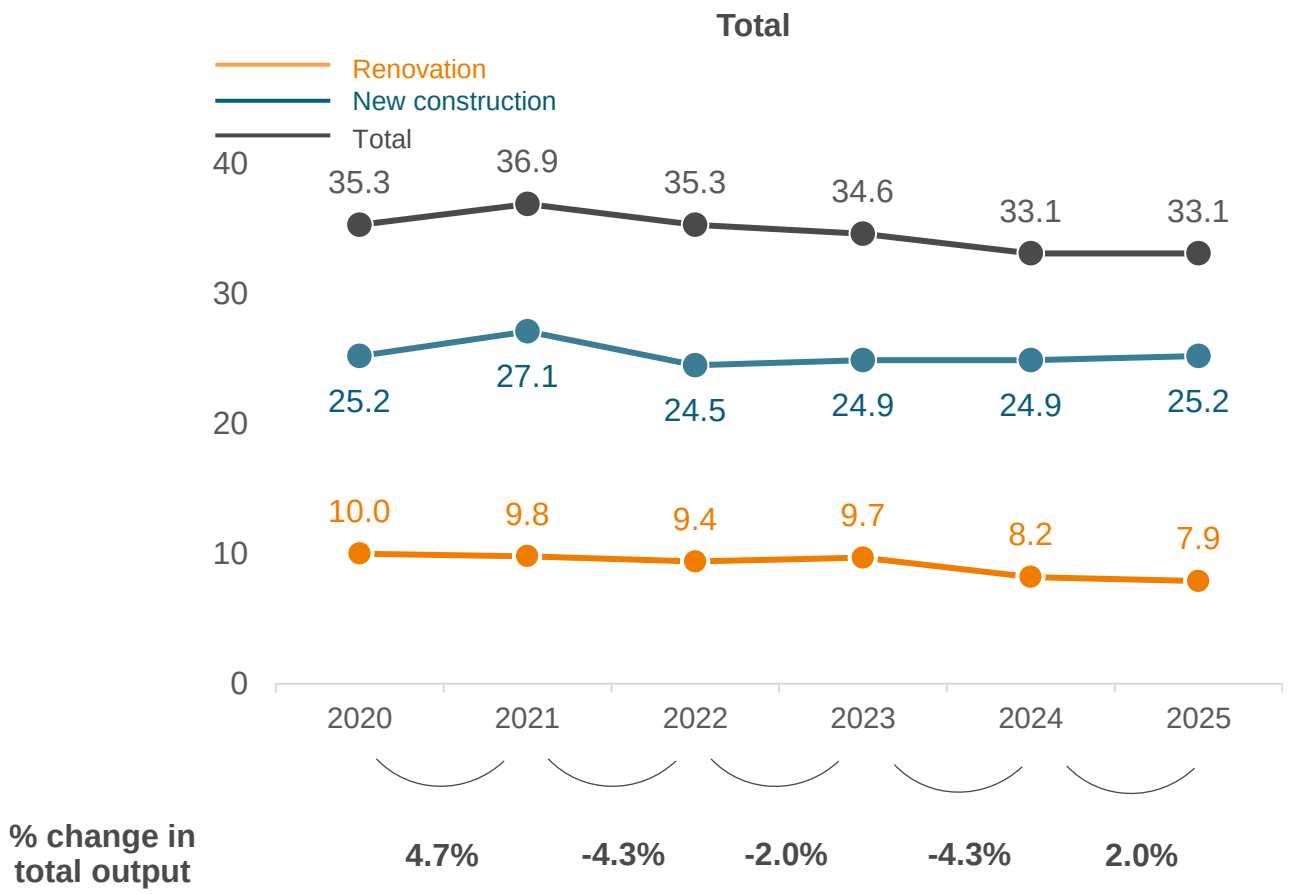


Economic and construction related indicators	Value Q4 2023	Value Q3 2024	Value Q4 2024	Q-2-Q development
GDP (quarterly growth rate) (%)*	0.0	1.3	-0.1	Negative
Consumer confidence indicator**	-3.0	-0.2	-2.1	Negative
Industrial confidence indicator**	-17.2	-16.7	-17.4	Negative
Construction confidence indicator**	-18.0	-16.6	-16.3	Neutral
Production value buildings (index 2015=100)**	125.0	102.2	96.6	Negative
Architects with postponed projects (%)***	47	46	48	Neutral
Architects with cancelled projects (%)***	24	33	37	Negative
Building permits residential (index 2015=100)**	76.4	88.3	n/a	Neutral
Building permits non-residential (index 2015=100)**	88.2	82.6	n/a	Neutral

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

Forecast of building volumes in billion euros

(% change year over year)



Index

Research questions **TREND part of this study (DMU)**

WHY SMART MATERIALS AND TECHNOLOGIES AS KEY TRENDS TOPIC

Smart materials and technologies are transforming architecture by enhancing sustainability, efficiency, and adaptability in building design. As the construction industry faces increasing demands for energy efficiency, resilience, and environmental responsibility, architects must integrate these innovations to improve performance, reduce waste, and create smarter, more future-proof structures. Embracing these advancements ensures the industry stays at the forefront of sustainable and intelligent design.

THE RESEARCH QUESTIONS

- *How familiar are you with the concepts of smart materials and smart home/building technologies?*
- *What comes to your mind first when hearing the term smart materials?*
- *What comes to your mind first when hearing the term smart home/smart building technologies?*
- *In what share of your projects are smart materials applied?*
- *In what share of your projects are smart home or smart building technologies applied?*
- *How strong of a growing demand do you notice among principals of your projects for smart materials and smart home and building technologies?*
- *And what do you think will be the share of your projects where smart home or smart building technologies are applied in five years from now?*
- *What do you consider the biggest challenges when it comes to integrating smart materials and smart home or building technologies into your designs?*
- *What do you consider the biggest benefits of smart materials and smart home or building techologies in your designs?*
- *Which smart materials have been applied in your projects so far?*
- *Which smart home/smart building technologies have been applied in your projects so far?*
- *Which stakeholders in the value chain are driving the demand for smart materials and smart buildings the most?*
- *In which building segments do you see the demand for smart materials and smart buildings being the strongest?*

Key insights

1

Awareness gap: Smart materials lag behind smart technologies

…

Adoption & Market Demand

…

Barriers to Adoption

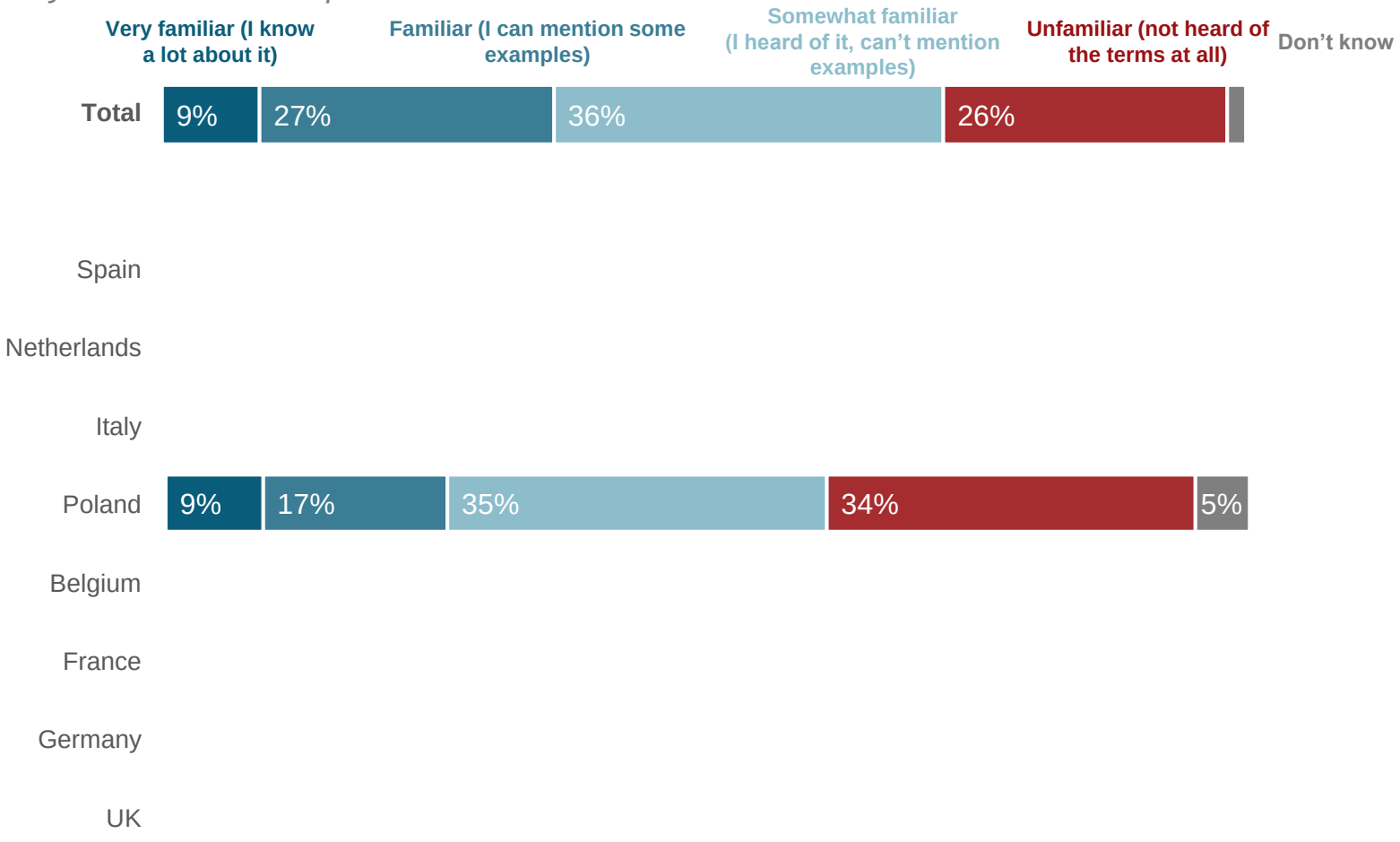
…

Majority of European architects are at least somewhat familiar with smart materials.

...

General familiarity of architects with smart materials

How familiar are you with the concepts of smart materials?



European architects generally see application of smart materials and technologies growing in the future

Prediction for 5 years from now

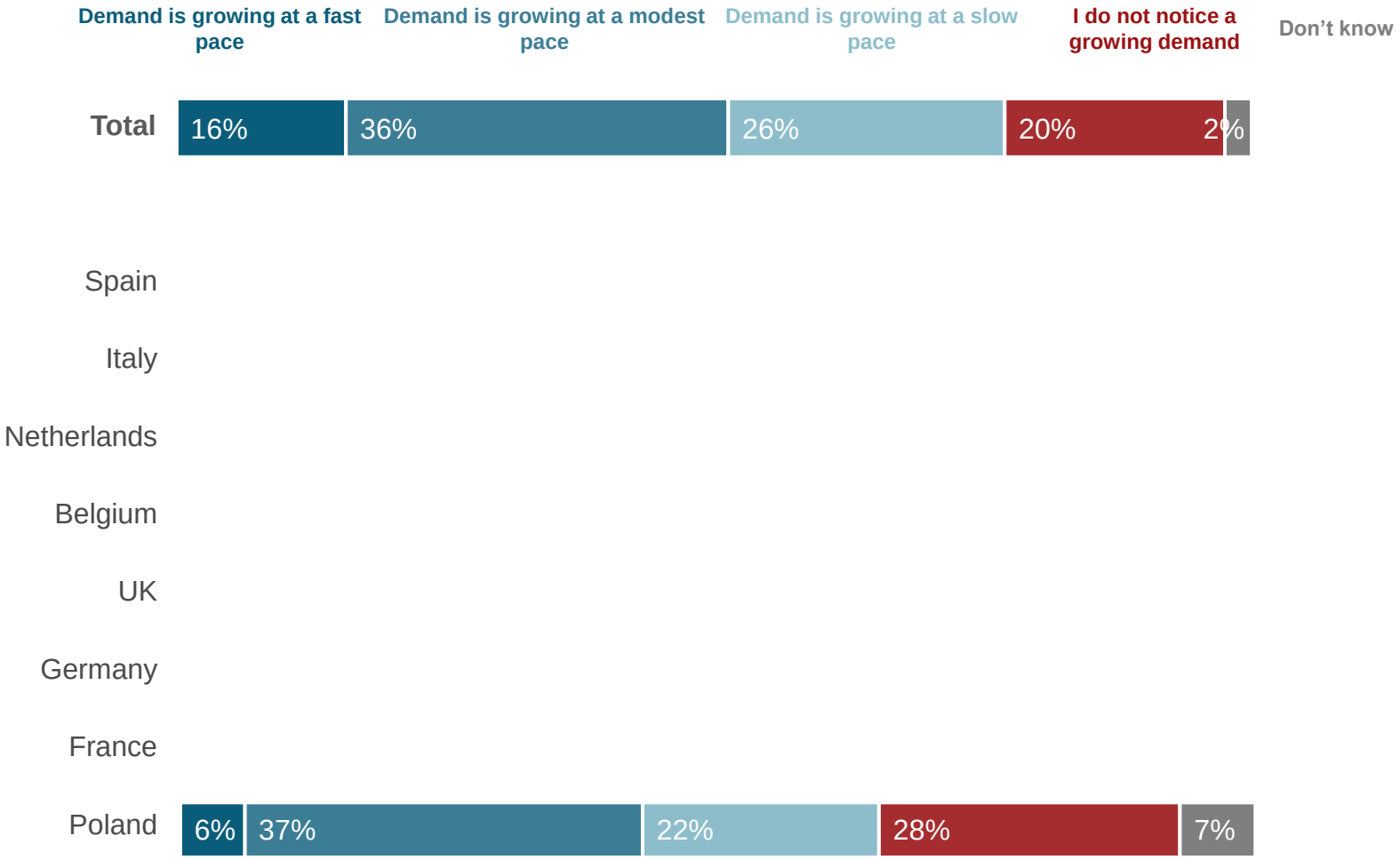
And what do you think will be the share of your projects where smart home or smart building technologies are applied in five years from now?

	TOTAL	Germany	UK	France	Italy	Spain	Netherlands	Belgium	Poland
	n=803								n=78
Share of projects where smart home or smart building technologies are applied **in five years from now**	**53%**								45%

Spanish and Italian architects also see more growth in demand for smart technologies than other countries.

Growth prediction – smart home/smart building technologies

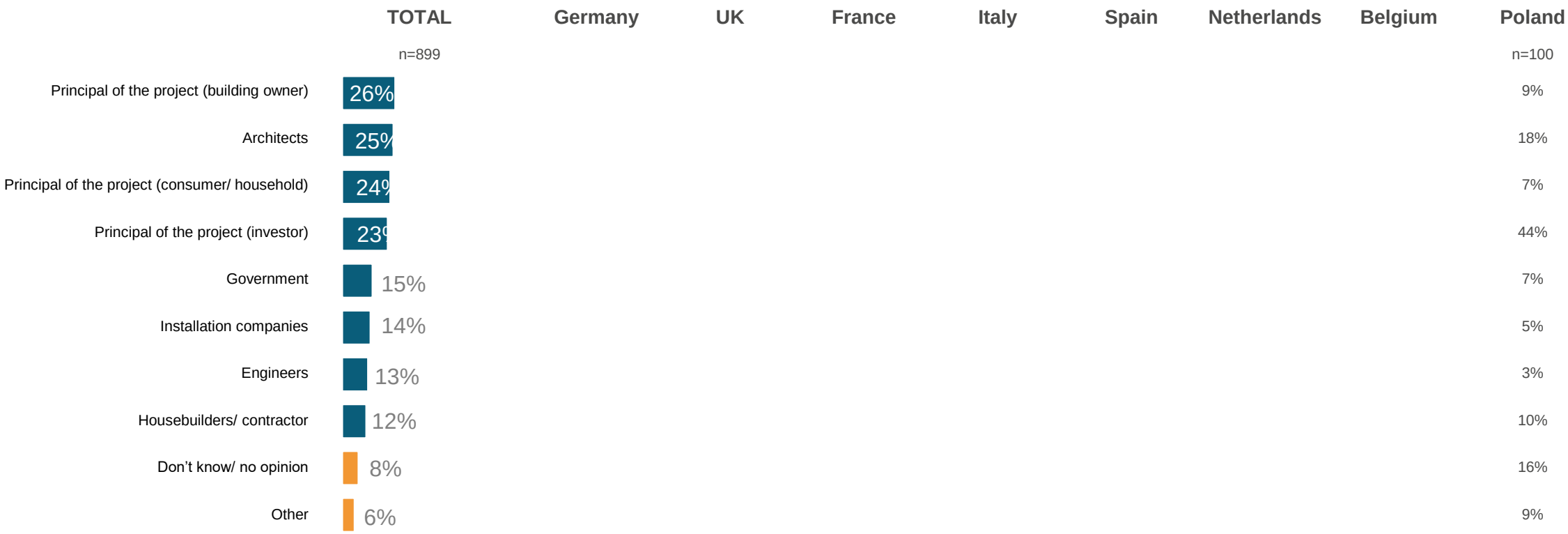
How strong of a growing demand do you notice among principals of your projects for smart home and building technologies?



Project principals and architects are the strongest drivers of demand for smart materials and smart home technologies.

Stakeholders that drive the demand

Which stakeholders in the value chain are driving the demand for smart materials and smart buildings the most?

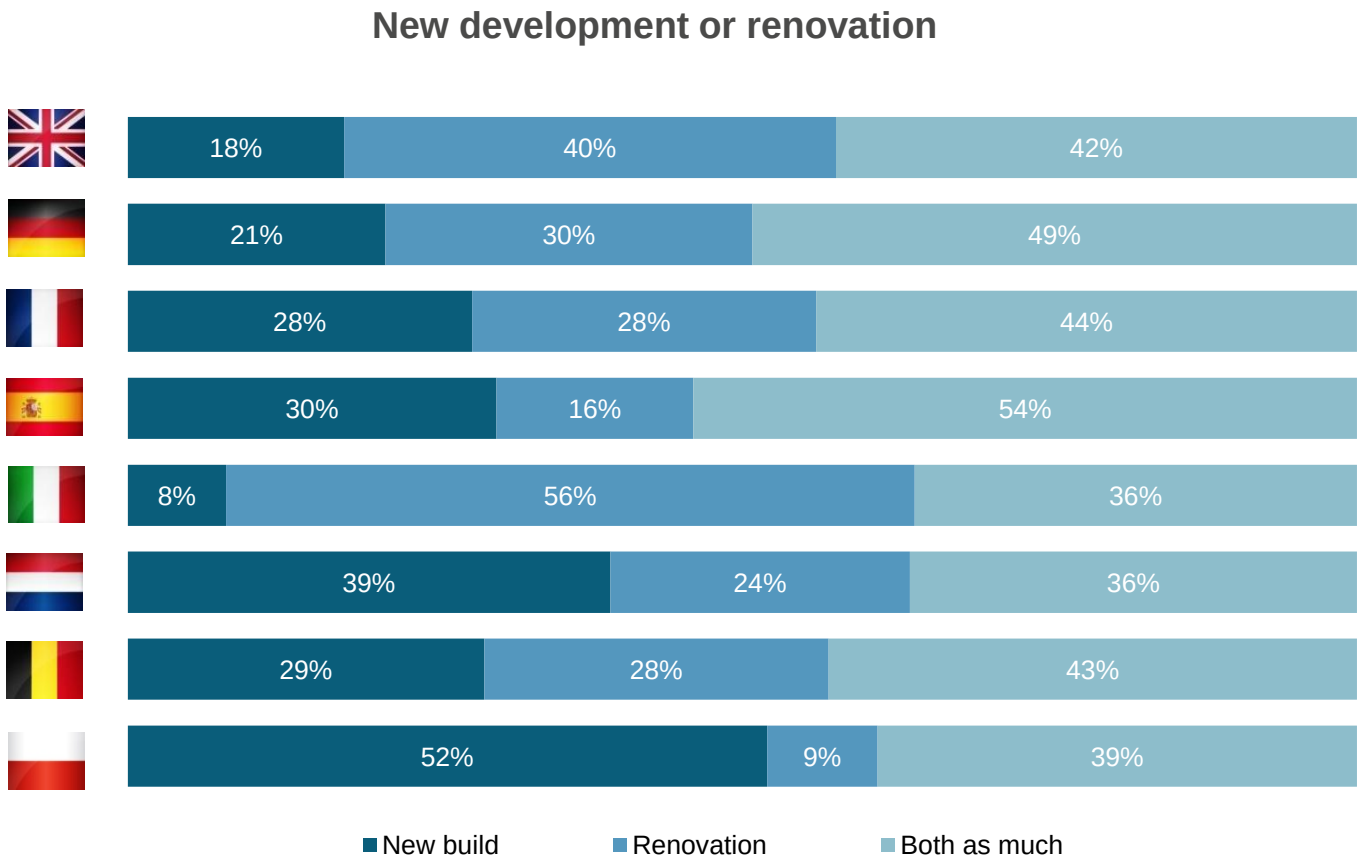


*showing results down to 5%, results smaller than 5% are added to 'Other'

Index

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.



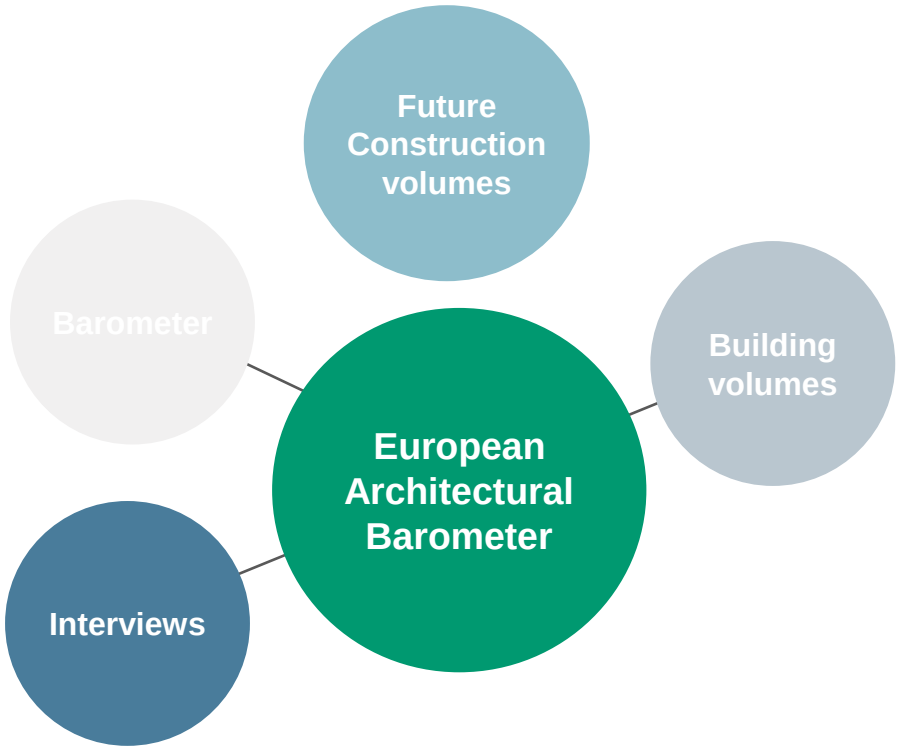
About European Architectural Barometer

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

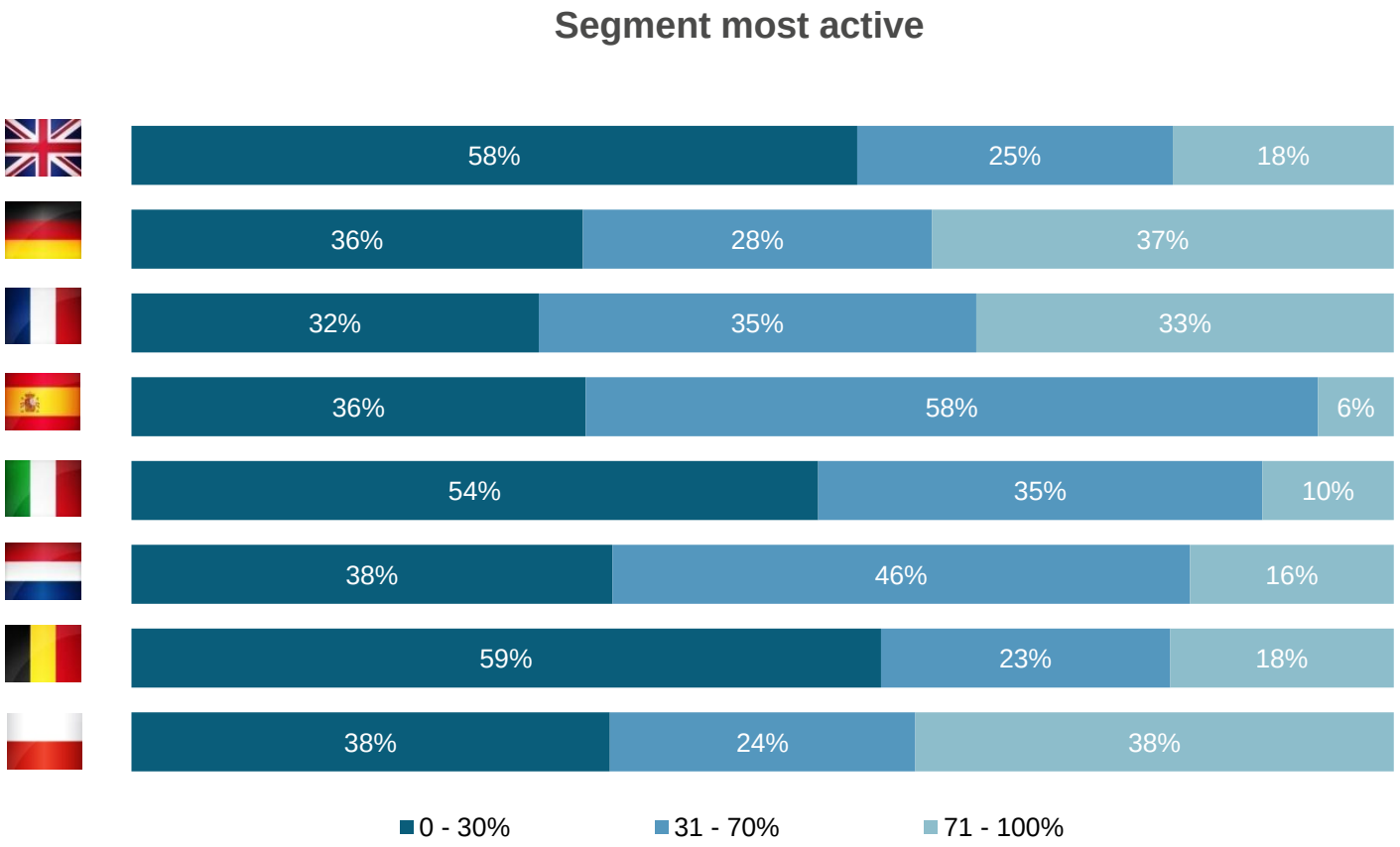
For decision makers charged with considerations of company resources, staffing and marketing strategy, a clear insight into future construction volumes is essential. However, economic indicators seldom provide an adequate picture of these volumes.

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

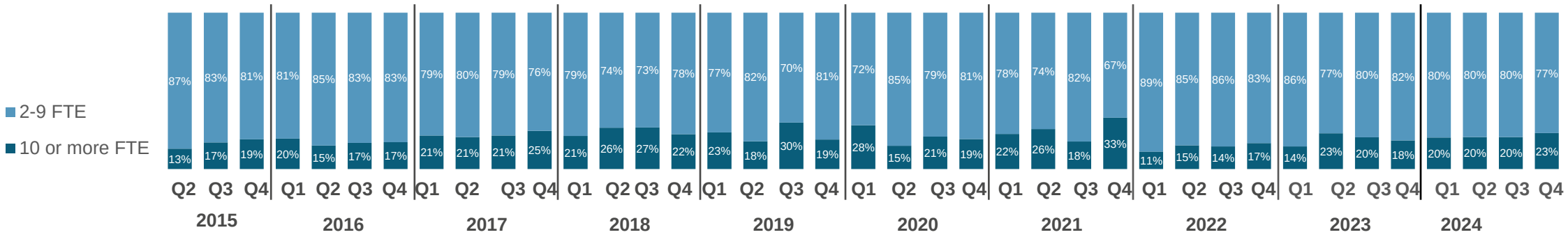
For three key questions from the current measurement of the European Architectural Barometer, the results are divided by architects that realise most of their sales in the residential segment (0% – 30% non-residential), by architects that realise sales in both segments (31% - 70% non-residential), and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

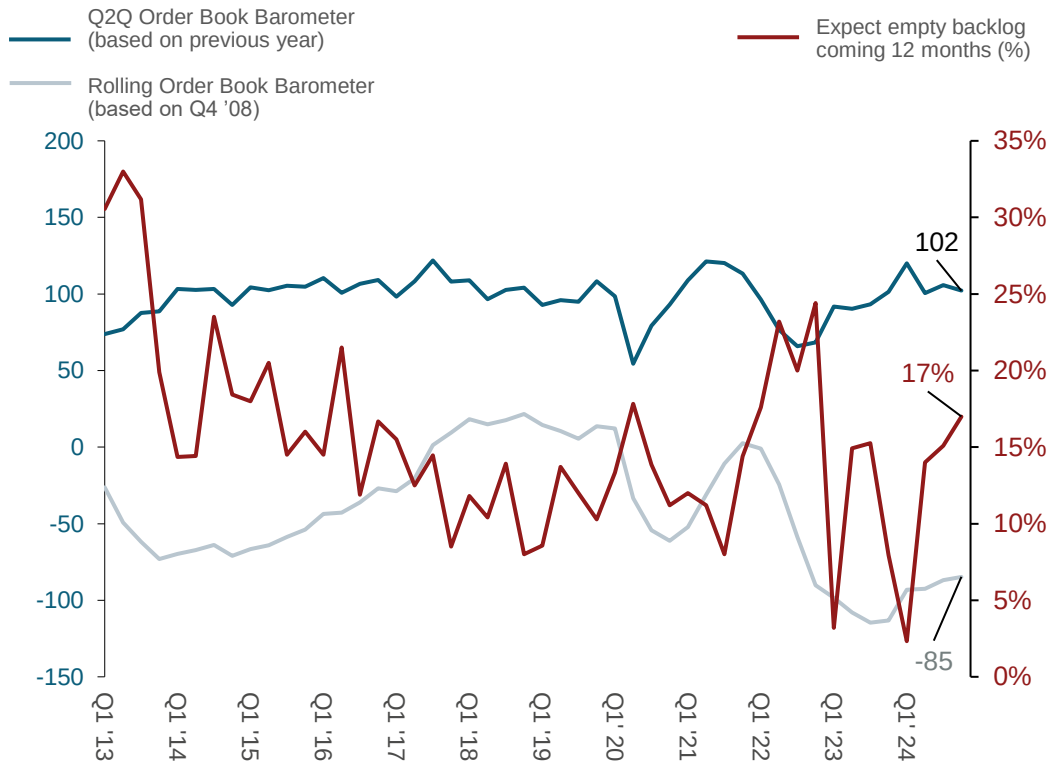


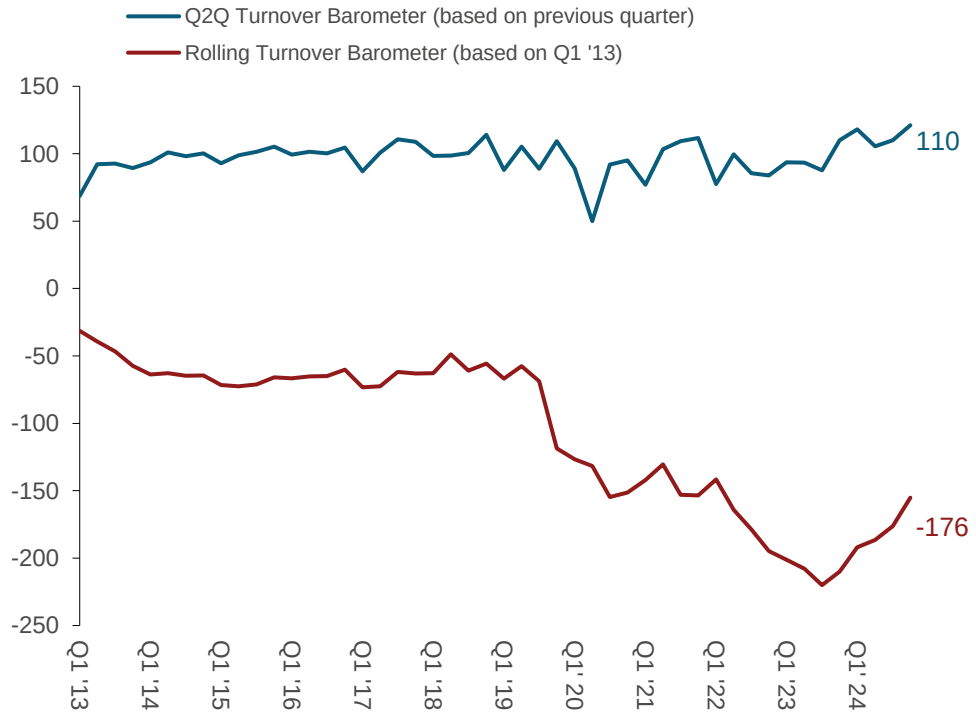
The tables on the following pages show the above-mentioned split with regard to the following questions:

- **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 Polish architects







Development turnover and order book

Development turnover
(based on previous quarter)

% sales in non-residential	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100	0 - 30	31 - 70	71 - 100
Strongly increased (>5%)																						29%	14%	39%
Slightly increased (0-5%)																						15%	19%	9%
Stayed the same (0%)																						38%	52%	36%
Slightly decreased (0-5%)																						3%	5%	3%
Strongly decreased (>5%)																						15%	10%	12%
Barometer turnover																						**121**	**112**	**130**

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%)																						26%	5%	25%
Slightly increased (0-5%)																						15%	10%	3%
Stayed the same (0%)																						38%	65%	42%
Slightly decreased (0-5%)																						0%	5%	3%
Strongly decreased (>5%)																						21%	15%	28%
Barometer order book																						**113**	**93**	**97**

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)	1771	2371	1657	2003	1513	1080	1625	-
Net sample (all approached respondents)	657	720	299	901	479	704	604	-
Completed interviews	125	125	125	100	125	100	100	100
Response percentage (interviews/ net sample)	19%	17%	42%	11%	26%	14%	17%	-

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.

Questionnaire – Standard

These questions are asked every measurement

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

Questionnaire – Theme questions

Smart materials and technologies

A1. How familiar are you with the concepts of smart materials and smart home/building technologies?

- Smart materials
- Smart homes or buildings

- Very familiar (I know a lot about it)
- Familiar (I can mention some examples)
- Somewhat familiar (I heard of it, but can't mention examples)
- Unfamiliar (I have not heard of the terms at all)
- Don't know/ no opinion

A2. What comes to your mind first when hearing the term smart materials?

- Adaptive to the environmental changes
- Energy-efficient materials (focus on energy use)
- Technology-integrated materials
- Responsive to stimuli (thermal, light, humidity, motion changes)
- Embedded smart sensors
- Multifunctional substances
- Eco-friendly solutions (focus on sustainability and environmental impact)
- Intelligent insulation
- Futuristic building materials
- Other, namely:
- Don't know/ no opinion

A3. What comes to your mind first when hearing the term smart home/smart building technologies?

- Internet-Of-Things enabled devices (e.g., connected appliances, sensors, and systems)
- Adaptive lighting systems
- Adaptive HVAC systems
- Automatic windows
- Renewable energy integration
- Smart security systems
- Smart home automation hubs (e.g., Amazon Echo, Google Nest Hub)
- Smart appliances
- Voice-controlled systems (e.g., Alexa, Google Assistant)
- Other, namely:
- Don't know/ no opinion

Questionnaire – Theme questions

A4. In what share of your projects are smart materials applied?
A5. In what share of your projects are smart home or smart building technologies applied?
A6. Can you divide your projects where smart home or smart building technologies are applied by residential and non-residential buildings?
A7. How strong of a growing demand do you notice among principals of your projects for smart materials and smart home and building technologies?

- Smart materials
- Smart home and building technologies

- Demand is growing at a fast pace
- Demand is growing at a modest pace
- Demand is growing at a slow pace
- I do not notice a growing demand
- Don’t know/ no opinion

A7a. And what do you think will be the share of your projects where smart home or smart building technologies are applied in five years from now?
A8. What do you consider the biggest challenges when it comes to integrating smart materials and smart home orbuilding technologies into your designs?

- Limited availability of smart materials
- Lack of proven long-term performance data
- Difficulty in sourcing compatible materials
- Technical integration with traditional materials
- Complex installation or construction processes
- Limited adaptability to diverse climates
- High initial costs of smart materials
- Unclear cost-benefit analysis for clients
- Expensive maintenance or replacement parts
- Lack of expertise among contractors
- Limited access to technical training or support
- Insufficient guidance from suppliers
- Difficulties in integrating into design workflows
- Smart materials restricting creative freedom
- Delays due to custom manufacturing timelines
- Client resistance to unfamiliar technologies
- Concerns about the aesthetic impact of smart materials
- Perceived unreliability by stakeholders
- Compliance with local building codes
- Lack of standardized testing or certifications
- Regulatory uncertainty around emerging technologies
- Other, namely:
- Don’t know/ no opinion

Questionnaire – Theme questions

A9. What do you consider the biggest benefits of smart materials and smart home or building techologies in your designs?
- Enhanced energy efficiency
- Reduced carbon footprint
- Improved thermal insulation
- Adaptability to the environment
- Real-time responsiveness
- Innovative design possibilities
- Dynamic building aesthetics
- Reduced operational costs
- Increased property value
- Future-proofing designs
- Other, namely:
- Don’t know/ no opinion

A10. Which smart materials have been applied in your projects so far?
- Self-healing concrete
- Smart insulation materials
- Electrochromic glass on windows (Windows that change tint in response to light, temperature, or electrical stimulus)
- Photovoltaic surfaces (Surfaces that capture solar energy, e.g., solar panels integrated into building facades)
- Phase-change materials (Materials that absorb or release heat as they change phases, improving thermal regulation)
- Hydrogel moisture control (Materials that manage moisture, often used in controlling humidity within building materials)
- Embedded smart sensors
- 3D-printed materials
- Energy-storing coatings
- Other, namely:
- Don’t know/ no opinion

A10a. Which smart home/smart building technologies have been applied in your projects so far?
- Internet of Things (IoT)-enabled devices (connected appliances, sensors, and systems)
- Adaptive lighting systems
- Smart HVAC systems (automated heating, ventilation, and air conditioning)
- Smart security systems
- Smart home automation hubs (e.g., Amazon Alexa, Google Nest Hub)
- Energy management and monitoring systems (smart meters, energy tracking)
- Automated windows
- Renewable energy integration (solar panels, wind turbines, energy storage)
- Automated home security systems (e.g., smoke detectors, water leak sensors)
- Other, namely:
- Don’t know/ no opinion

Questionnaire – Theme questions

A11. Which stakeholders in the value chain are driving the demand for smart materials and smart buildings the most?

- Architects
- Engineers
- Housebuilders/ contractor
- Installation companies
- Principal of the project (building owner)
- Principal of the project (consumer/ household)
- Principal of the project (investor)
- Government
- Other, namely:
- Don’t know/ no opinion

A12. In which building segments do you see the demand for smart materials and smart buildings being the strongest?

- Housing segment
- Industrial buildings
- Healthcare buildings
- Educational buildings
- Sports facilities
- Hotels
- Public buildings
- Other, namely:
- Don’t know/ no opinion

About USP Marketing Consultancy

Over 30 years internationally operating market research and consultancy agency specialized in the construction, DIY, installation and real estate market.

Dedicated research and market reports.

Active in more than 30 countries per year.

Head Office

NL - Rotterdam

Branch Office

HR - Zagreb

Subsidiary

DE - Dusseldorf

Our Services

USP

DEDICATED MARKET RESEARCH

Our main business area is conducting dedicated, ad-hoc market research worldwide for key stakeholders supplying the construction, installation, home improvement and real estate

MARKET REPORTS

Benefit from a wide variety of ready-made market reports covering a range of topics like BIM, prefab, sustainability, buying behavior and much more, trough the eyes of key stakeholders in the value chain

OUR ADDED VALUE

With our 30 years of experience in the industry, USP can do more then just deliver data. Our mission is to provide insights and advice you van build on. We are a sparring partner, instead of a data provider.

OUR GEOGRAPHIC SCOPE

Our reports cover multiple key markets worldwide and in multiple countries at the same time, ensuring comparability and reliability.

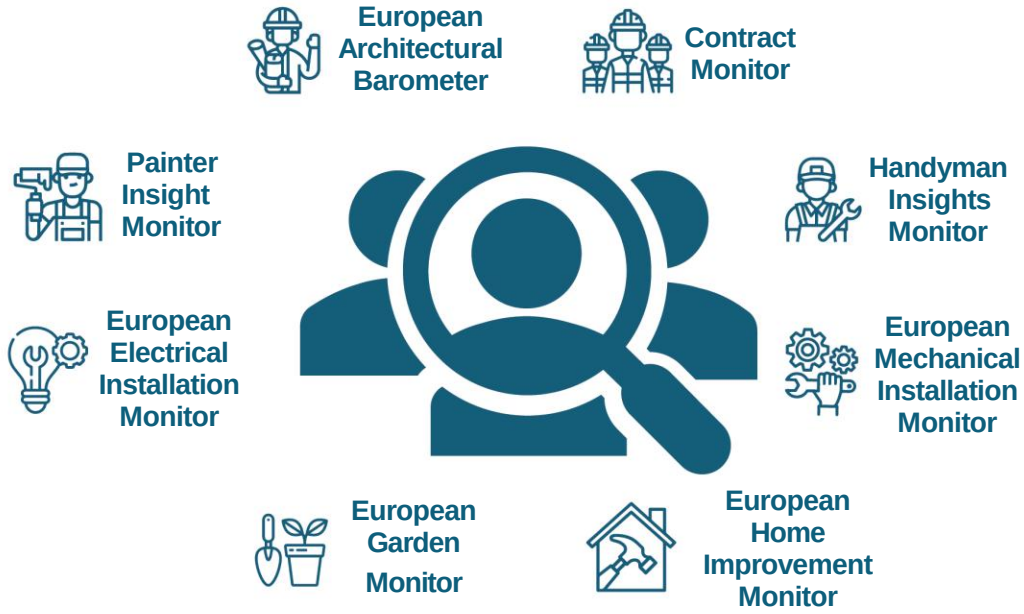
Our Services

USP

Dedicated Market Research

56.750	66.400	78	1.778	1.778
Phone interviews	Online interviews	Group discussions	In-depth interviews	Number of projects

Market Reports



13.600	26.400	82	78
Phone interviews	Online interviews	Customers	Number of market reports

USP

Branding

The more distinct your brand is, the more valuable it will be.
Especially in the construction, installation and home improvement market segments, as product differentiation is decreasing and the stakeholders are traditional and relatively brand loyal. USP has 30+ years of experience conducting branding researches in the construction, installation and home improvement markets, both B2B and B2C.

Customer Satisfaction

USP has been conducting many customer journey studies annually, both B2B and B2C, qualitative and quantitative, in the construction, installation and DIY segments.
Understanding your customers journey from orientation & inspiration all the way to services and retention are vital to increase your sales and marketing effectiveness.

Customer Journey

Understanding your target groups and being able to use a good segmentation & persona's can greatly increase marketing and sales effectiveness. USP frequently conducts segmentation studies for key stakeholders in the construction, installation and home improvement markets, both B2B and B2C, qualitative and quantitative.

Product Development

As product development plays a vital part in the growth of any business, it's not a surprise that USP frequently gets request to conduct product development studies, both B2B and B2C. Whether it's a concept test or a evaluation of a pre-production product, you can rely on our 30+ years of experience conducting these types of studies in the construction, installation and DIY markets.

Segmentation

Understanding your target groups and being able to use a good segmentation & persona's can greatly increase marketing and sales effectiveness. USP frequently conducts segmentation studies for key stakeholders in the construction, installation and home improvement markets, both B2B and B2C, qualitative and quantitative.

Market Size

To know if further growth is possible and whether your sales are developing in line with market volume, it is important for your business or organisation to understand the total market size and the share of your brand(s). With our track record of 30+ years in conducting market size studies in the construction, installation and home improvement industries, we can assist you in the entire process.

Market Exploration

Perhaps you plan to enter a new market with your product or service? In that case, you need to understand exactly what is going on in that market. We use a range of methods to identify the market characteristics and combined with our three decades of experience conducting market research in the construction, installation and DIY industry, we can deliver insights and advice to build on.

Pricing

USP can lean on 30+ years of market expertise in the construction, installation and home improvement markets to assist you with any kind of pricing studies. Whether it's how to maximize revenue and ROI or what price levels are best suited for a new product launch, USP can provide the insights and advice.

Driver Analysis

Driver analysis can provide insights into the relevance and most important drivers for all of the relevant stakeholders in the construction, installation and home improvement business value chain. Our customers often use this information to develop new products and services. USP has over three decades of experience conducting driver analysis, providing insights and advice to our customers, both B2B and B2C

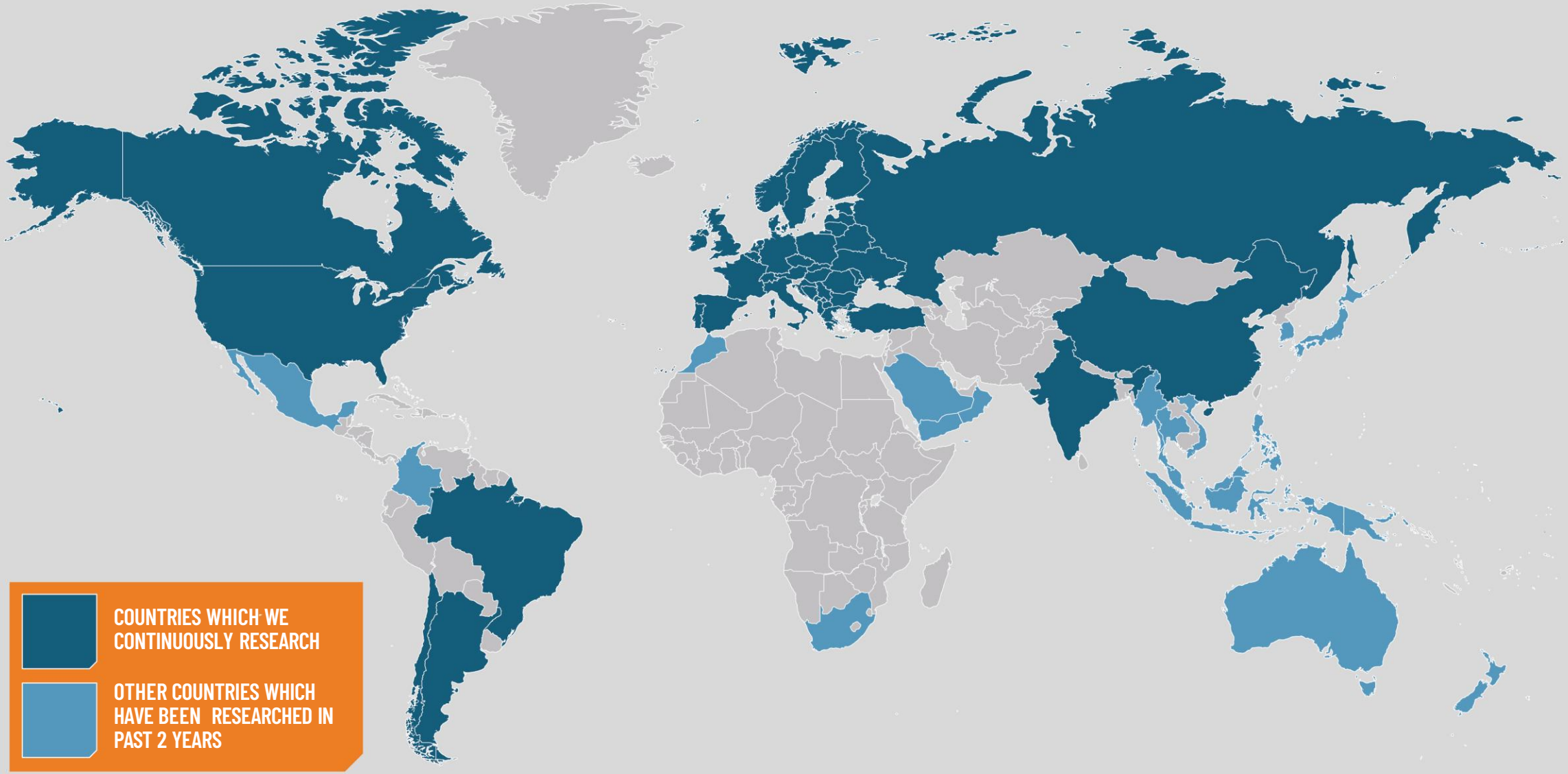
- 304 dedicated project in 2023/2024
- Tailor-made projects, driven by your information needs
- More then just a data provider, advice & insights based on facts and over 30 years of experience in the industry
- Worldwide coverage
- B2B, B2C, qualitative and quantitive research or a combination of both
- Within our market specialism, all types of researches can be conducted
- Targeting the right audience, with the right questions at the right time

Market reports

USP

	Target group	Methodology	Total interviews	Countries	Frequency	Themes 2024
European Architectural Barometer	Architects	Phone interviews	3,400		Quarterly	Sustainability, Trends in material usage, Decision making, Brand Health Scan
European Contract Monitor	Contractors	Phone interviews	2,050		Bi-annually	Prefabrication, Digitalisation and BIM
European Mechanical Installation Monitor	HVAC Installers	Phone interviews	2,600		Quarterly	Digitalisation and BIM, Prefabrication, Smart buildings and products, Media orientation
European Electrical Installation Monitor	Electrical installers	Phone interviews	3,000		Quarterly	Sustainability, Smart buildings and products, Services in the installation market
European Painter Insight Monitor	Professional painters	Phone interviews	2,300		Annually	Trend tracking, Sustainability, Labour shortage, Online buying, Media orientation
European Home Improvement Monitor	Consumers	Online interviews	26,400		Quarterly	Orientation; rise of digital natives, Purchase Channels; online leaders Brand health check, DIY vs DIFM; outsourcing jobs
European Handyman Monitor	Handymen	Phone interviews	3.400		Quarterly	Trend tracking, Activities and product usage, Purchase and decision behaviour, Brand performance scans
European Garden Monitor	Consumers	Online interviews	6.400		Annually	Smart Garden, Sustainable Garden, City Gardening, Health Gardening, Outdoor living

Our scope


COUNTRIES WHICH WE CONTINUOUSLY RESEARCH
OTHER COUNTRIES WHICH HAVE BEEN RESEARCHED IN PAST 2 YEARS

A selection of USP Marketing Consultancy's clients

USP

Construction

ASSA ABLOY | 3M | FLEX Das Original
Kingspan | VELUX | TOOLSTATION
BMI | FESTOOL | fischer
KNAUF | DAW | amtico flooring
forbo | ROCKWOOL | covestro
REYNAERS aluminium | WD-40 | PPG
BOLTON | AkzoNobel | SIG
Wienerberger | SAINT-GOBAIN | Sika

Installation

ABB | BOSCH | GIRA
DORN BRACHT | GRUNDFOS | hager
sonepar | Schneider Electric | LG
PIPELIFE | KALDEWEI | MITSUBISHI ELECTRIC
legrand | TRILUX | SAMSUNG
VIESSMANN | Vaillant | REHAU
EMERSON | wavin | GEBERIT
DAIKIN | signify | ROTHENBERGER

Home Improvement

adeo | Orkla House Care UK | Dulux
tesa | 3M | GROHE
Villeroy & Boch | MTD | Bostik
KÄRCHER | hansgrohe | UNILIN
AkzoNobel | NEWAGE | StanleyBlack&Decker
maxeda DIY Group | DELI HOME | BRIGGS & STRATTON
cromology | Ideal | ShurTech Brands
Yale | BOLTON ADHESIVES | PPG

USP

CATRIN KLEIN
Head of Customer & Market Insights at Hilti

The Contractor monitor reports that we receive from USP provide insights that are fact-based and highly relevant. The reports are easy to assimilate with out internal audience and set foundation for deeper discussions.

DANIEL ANGELOVSKI
Group Insights Manager at Velux

The specialized insights in the Home Improvement Monitor are a great source of input for our industry analysis.

MIRYAM SALVADOR
Global Channel Director at Schneider Electric

Their specialized insights on construction and installation markets allow us to make go-to-market decisions based on factual data. Their customer-centric approach helps us put customer needs at the centre of our decisions.

DALIA GONCIAUSKAITE
Marketing Manager Architectural at Covestro

USP is professional, responsive, didactic, and voluntary. It was easy to exchange my thoughts with them.

HARDY JAESCHKE
Senior Manager Market Research, Market Intelligence at Vaillant Group

The USP reports help us better understand different B2B target groups, better assess their business situations and enrich our range of knowledge enormously.

ARMIN DIPPING
Senior Manager strategic and international Marketing at Gira

With the Electrical installation monitor reports we receive from USP we get an overview and first insights on behaviour, relevant topics and trend in the electrical installation industry.

CAROLINE ROQUE
EMEA Consumer and Market Insights Manager at 3M Consumer Business Group

The USP team has very strong expertise in the construction and home improvement markets. We are using their detailed home improvement monitor reports very extensively.

JUSTYNA GUDOWSKA-POHLING
AC EMEA Customer Insights Manager at PPG

USP delivered the company good, useful business recommendations and insights, which have accelerated business growth.

*For more testimonials you can visit our website!

Client's testimonials on dedicated research

USP

GORDON MURRAY-SMITH
Market Intelligence and Insight Manager at BMI

USP is a trusted supplier of BMI as they understand our business, are professionals, and are pleasant to communicate with.

PAUL O'DWEYER
Global Consumer Market Development Manager at Bostik

Good working relationship between the project team, strong knowledge of the insights and findings from the fieldwork, presented and communicated very clearly in the report.

JOOST MAARSE
Global Lead Circular Economy at Grundfos

Delievered as promised and great regular communication towards us as a client.

HENDRIKJE BUDENBERG
Responsible Marketing & Communication BU Technical Insulation at Saint-Gobain Technical Insulation

With USP there is always a good personal contact and the research results were great.

FEDERICO ITRI
Associate Commercial Excellence Manager EMEIA at ASSA ABLOY Opening Soultions

We have a really good cooperation with USP, always great to do research projects together.

SUZANNA LAMMERTS VAN BUEREN
Director Business Development Nothern Europe at Somfy

USP thinks along and were able to, besides delivering the insights, brainstorm about the business opportunities.

OLGA KOLOS
Electrician Program Director, Global at Schneider Electric

We work with USP regularly, they are flexible and provide us with good results.

KATERINE BRUUN NIELSEN
Group insights Manager at Velux

USP always works very structurally and professionally, and we always feel in good hands.

*For more testimonials you can visit our website!

USP Marketing Consultancy