

RICS sustainable real estate survey Europe 2025

Responses across Europe 30 countries most responses coming from

1. Italy
2. Germany
3. Hungary

Majority of responses have a Valuation and Advisory background (60%)



ESG considerations in investment decisions: Drivers vs Barriers

66% Regulation

60% Client and stakeholder demand

47% Rising ESG reporting requirements

VS

49% Lack of evidence of return on investment

47% High initial costs

Top 5 biggest challenges for adopting sustainable construction practices?





Do you measure embodied carbon and consider biodiversity as a key role in your projects?

54.5%

of respondents do not measure embodied carbon, and only **14%** use such data to inform material and design choices

45.5%

consider biodiversity in fewer than half of their projects, and only **7%** consider biodiversity in all projects

Do green buildings achieve a rent or price premium over comparable non-green buildings?



72% of the respondents believe that green buildings achieve higher rents



63% of respondents reported that higher sales prices are achievable

Most important features of a green building for occupiers and investors



Shared Priorities (important to both occupiers and investors)

- High energy efficiency
- Recognised sustainability certifications (e.g. BREEAM, LEED)



Occupiers

- High indoor environmental quality (comfort, air quality, wellbeing)
- Availability of renewable energy sources
- Efficient building performance supporting operational efficiency and reporting requirements



Investors

- Smart technologies and building automation systems
- High adaptability and flexibility of buildings
- Resilience to climate-related risks



Lower Priority for Both Groups

- Green roofs and green walls