

ARCHITECT SENTIMENT — 2026

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ABOUT EBOSS

Established in 2006, EBOSS connects building product suppliers with New Zealand's architectural, design and construction community through their significant online product library, electronic publications, and industry events. EBOSS keeps the industry informed through their regular research programme, which includes past reports into BIM use in NZ and the Building Industry Supply Chain, Industry Sentiment Reports, and the EBOSS Pulse report which summarises demand indicators for residential and commercial construction.

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THE SURVEY

The data for this report was gathered in July 2026.

Note: Due to rounding, figures in some charts may not add to 100%.

BRANZ

This research was funded by BRANZ through the Building Research Levy. The EBOSS Sentiment Reports are one of a range of indicators contributing to [BRANZ Build Insights](#), helping provide a broader picture of activity, confidence and change across New Zealand's building and construction sector.

SUMMARY

This year's sentiment research indicates that the specifier pipeline is slowly filling. This is welcome news for the industry, though it tends to be within pockets at this point. National net sentiment on new project starts has moved into positive territory at +8, and leads are at +2. This is a significant improvement on the respective -21 and -13 of 2025. Project cancellations are trending downward and project holds have plateaued.

While we're seeing the pipeline return, margins and cashflow remain tight for specifiers. 58% of specifiers say it's harder to maintain profit and margin requirements in 2026 than it was in 2025. As a result, specifiers are trying to do more with less, likely accelerating the adoption of AI tools as they look to automate and improve cost efficiency. That said, market conditions vary widely by factors including focus of work (commercial or residential), geographic location, and business scale. Specifiers in large and commercially focused practices are reporting the largest increases in forward work, alongside the most positive outlook for new starts and leads. Similarly, the South Island is leading the country from a specifier perspective, with renewed confidence in Waikato, the Bay of Plenty and Auckland, while Wellington lags.

In general, practice workloads have increased to 78% capacity. In 2026, a third of practices are operating at 100% capacity, and only 6% have less than three months' work ahead. However, with a continued reduction in the design workforce over the last 24 months, we need to assess capacity carefully. A smaller staffing base is a confounding variable. Specifiers surveyed reduced their workforce by an average of 6% between 2025 and 2026, following a 17% reduction between 2024 and 2025.

That said, even with lower staffing levels, the overall picture this year highlights a market that is more positive and recalibrating rather than declining, although this improvement has yet to flow through fully to builders. In June 2025, specifiers forecast a slight improvement in their outlook for the next 12 months. The 5% they predicted has played out, and it is reassuring to see net sentiment rise to +18 for the next 12 months into 2027.

Note: We will be using the term Specifier throughout the report. Registered architects make up a large and valuable part of the designer industry, however architectural designers, architectural graduates and draughtspeople are also heavily involved in the design of residential and some commercial construction. To cover this mix of professions, we commonly use the term Specifier.

WHO WE SURVEYED

Of the 744 design professionals who responded*

- 36% are architects
- 30% are architectural designers
- 14% are architectural graduates
- 10% are technicians or draughtspeople
- 9% are in other roles

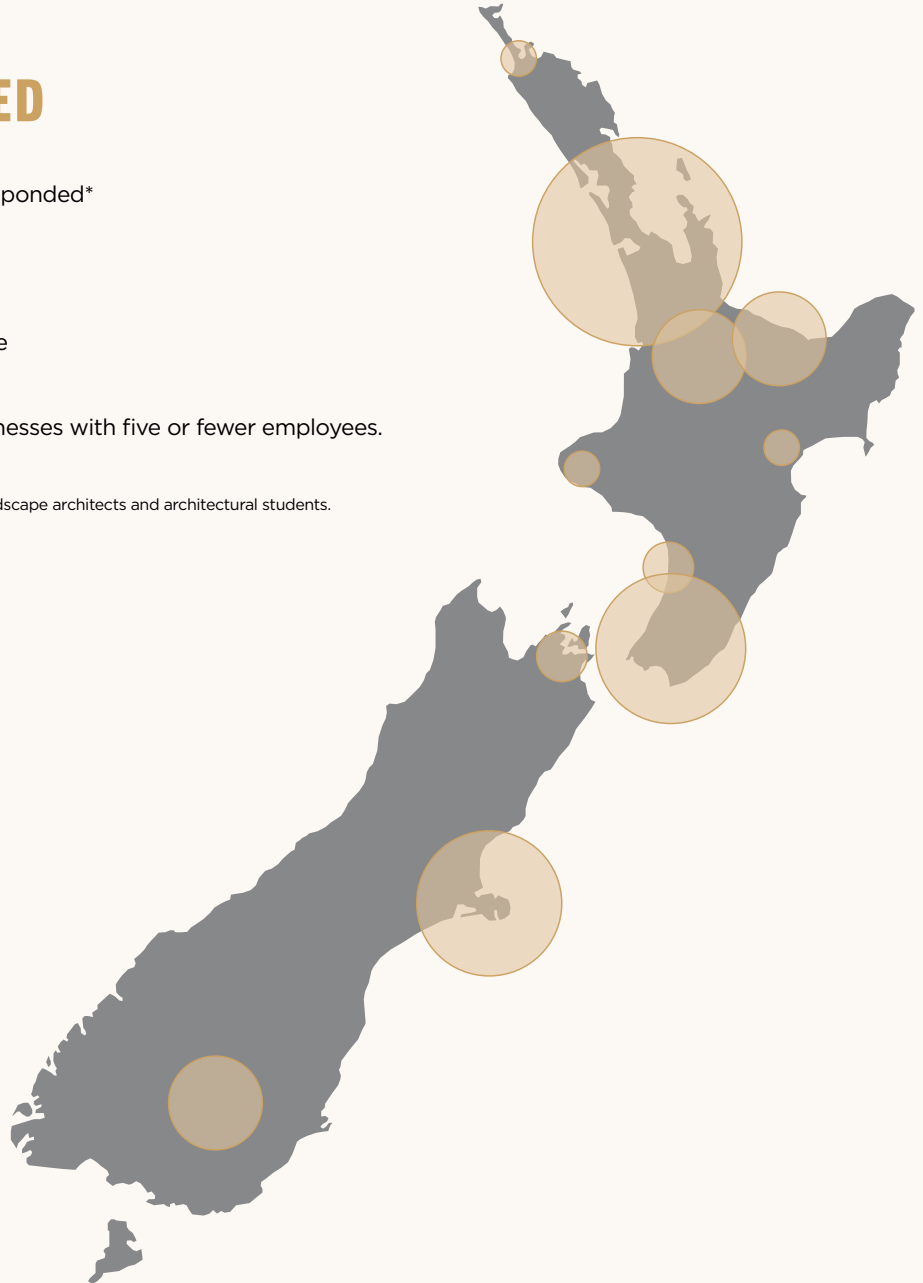
Four in ten specifiers work in small businesses with five or fewer employees.

*The remaining include interior designers, engineers, landscape architects and architectural students.

HOW THE SAMPLE WAS GEOGRAPHICALLY SPREAD

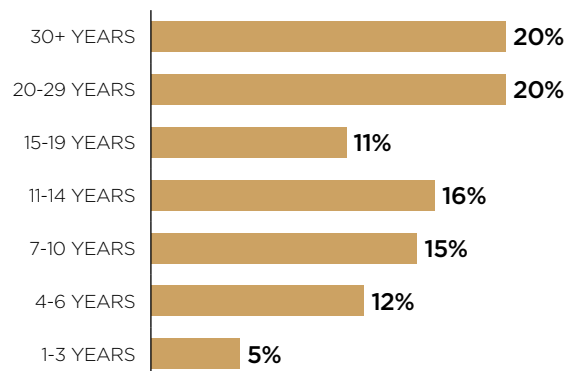
BASE: 744

NORTHLAND	1%
AUCKLAND	35%
WAIKATO	7%
BAY OF PLENTY	7%
GISBORNE	0%
HAWKES BAY	1%
TARANAKI	1%
MANAWATU - WHANGANUI	2%
WELLINGTON	18%
TASMAN, NELSON & MARLBOROUGH	2%
CANTERBURY	17%
OTAGO - SOUTHLAND	7%
MULTIPLE LOCATIONS	2%



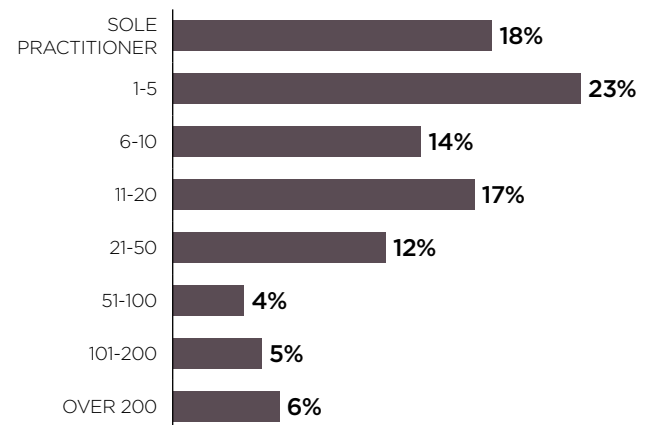
NUMBER OF YEARS IN BUSINESS

BASE: 744



NUMBER OF EMPLOYEES

BASE: 744

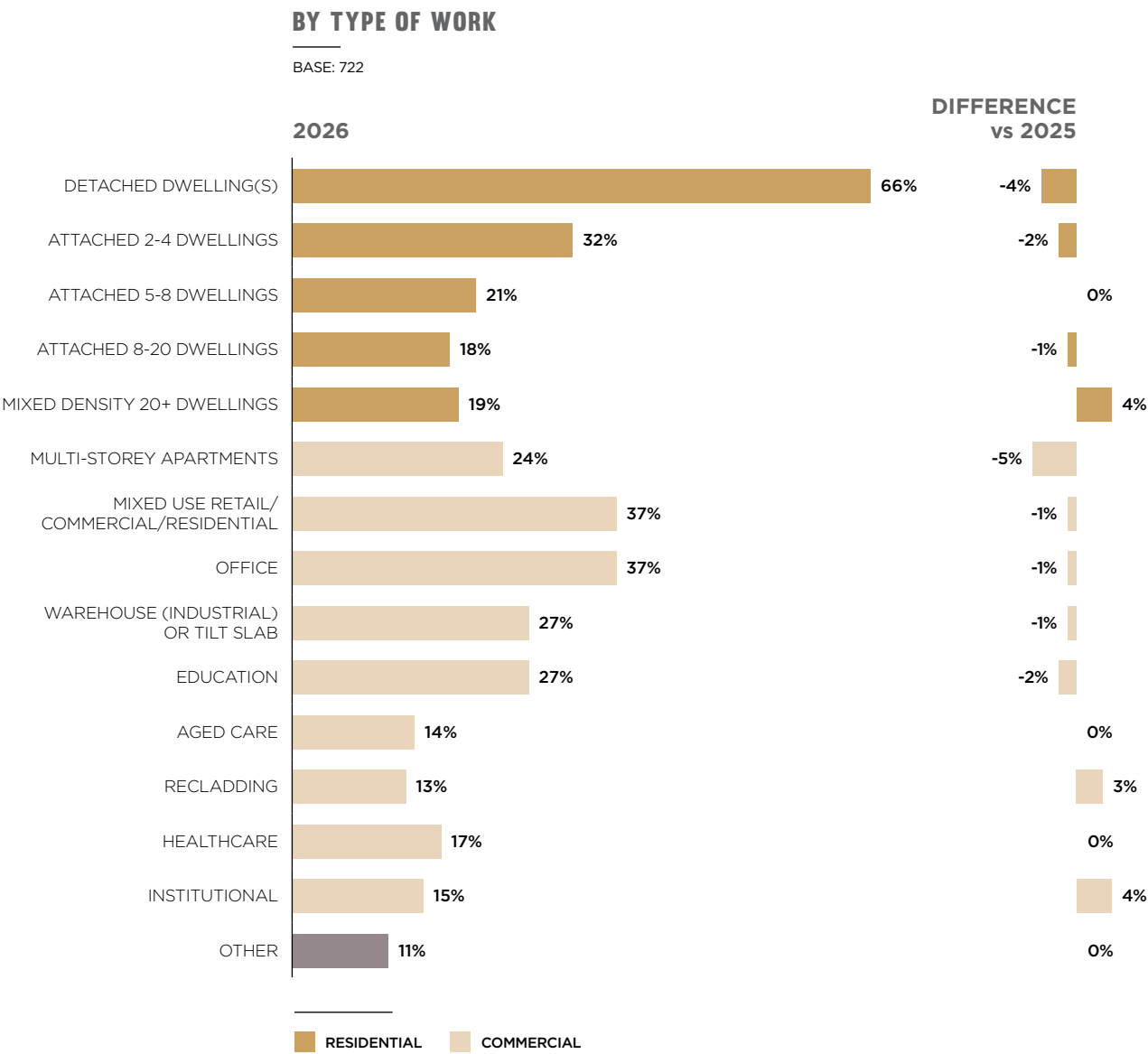


TYPE OF PROJECTS

Just under half (47%) of all specifiers surveyed are involved in both residential and commercial construction projects. This is down from the 51% who worked on both in 2025.

In 2026, the overall breadth of projects worked on has narrowed, with specifiers now working across an average of 3.8 project types, unchanged from 2025 and down from 4.1 in 2024.

While some practices report trying to cast a wider net to maintain pipeline volume, this is primarily happening within their established categories rather than jumping into unfamiliar sectors. However, converting these projects into work remains a challenge.



Q: "WHICH OF THE FOLLOWING BEST DESCRIBES THE TYPE OF WORK THAT YOUR COMPANY TYPICALLY WORKS ON?"

CURRENT CAPACITY ARCHITECTS ARE WORKING AT

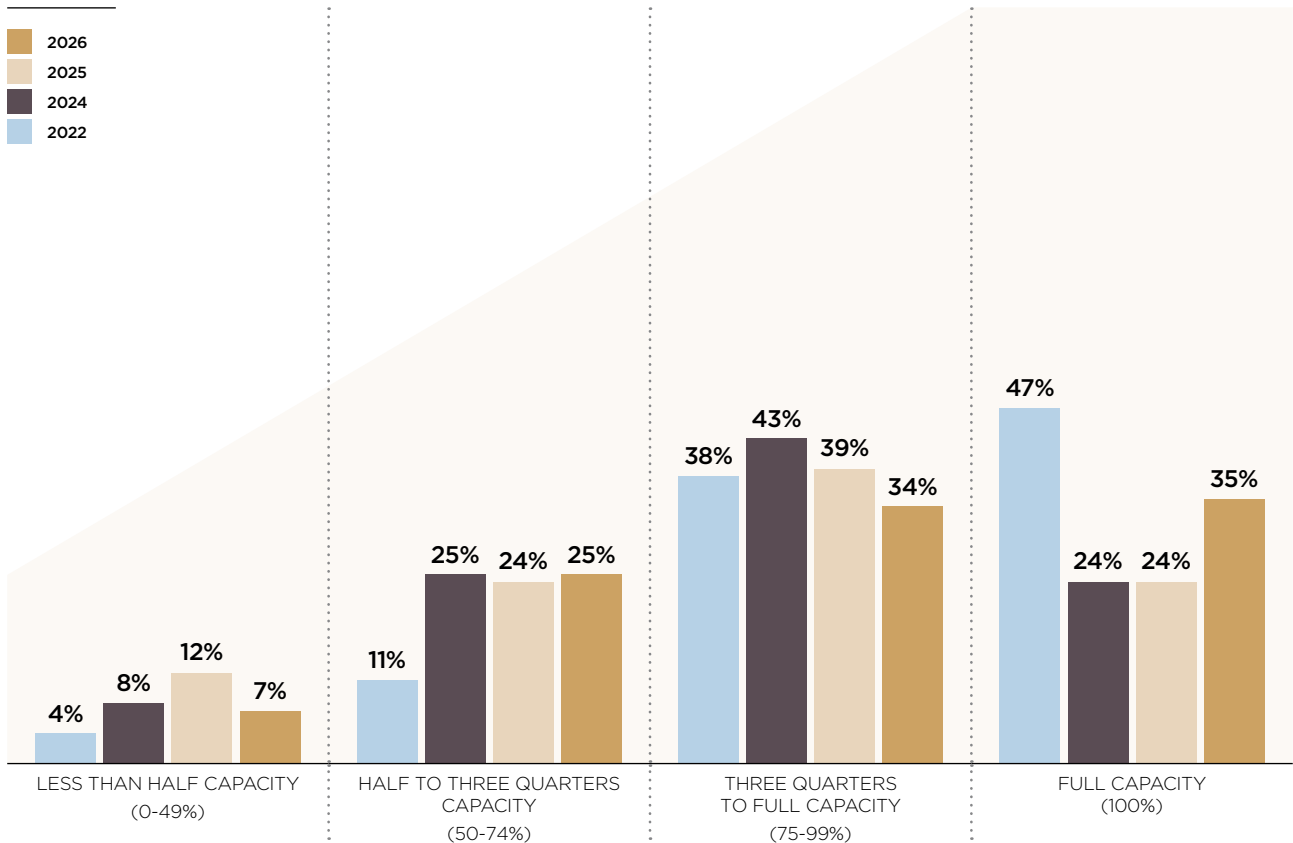
Each year since 2022, we have asked designers to report their business's operating capacity given their current staffing and resources.

Workload has begun to recover from a low of 74% average capacity in 2025. In particular, the proportion of designers operating at low capacity (0-49%) dropped from 12% in 2025 to 7% in 2026. At the same time, the share of practices operating at full capacity grew from a quarter to a third.

When asked if they had changed staffing levels over the last 12 months, a clear pattern on capacity emerges. Those who increased staff are working at a higher level of capacity (90%), those who decreased staff sit right on the average (78%), and those who kept staffing levels the same average 74% capacity.

CAPACITY ON AVERAGE

BASE: 501

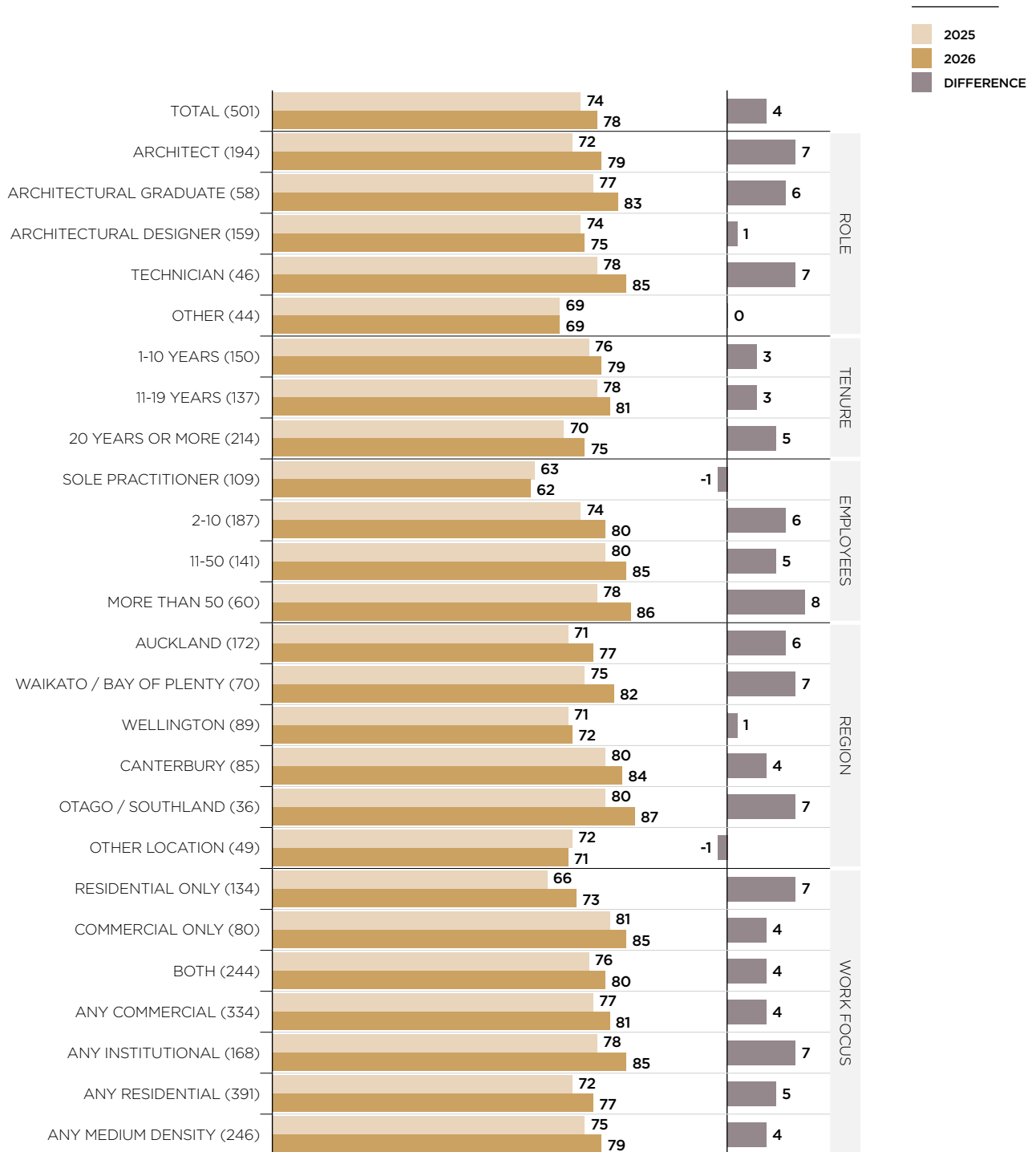


Q: "CONSIDERING THE RESOURCES AVAILABLE WITHIN YOUR BUSINESS RIGHT NOW, PLEASE ESTIMATE YOUR PRACTICE WORKLOAD AT PRESENT."

AVERAGE CAPACITY %

Workloads have lifted across all practice sizes except for sole practitioners, though the largest gain is among the largest practices. Wellington and areas outside the main

centres have yet to feel an increase in activity, while Otago/Southland leads the industry, sitting at 87% capacity at present.



Q: "CONSIDERING THE RESOURCES AVAILABLE WITHIN YOUR BUSINESS RIGHT NOW, PLEASE ESTIMATE YOUR PRACTICE WORKLOAD AT PRESENT."

DESIGN PIPELINE

The number of projects being put on hold has largely reached a plateau for specifiers, while project cancellations have turned a corner. Cancellations are now trending downward, with fewer reported in the 12 months to July 2026 than in the year prior.

HIGHER RATING = TOUGHER CONDITIONS

2026 2025

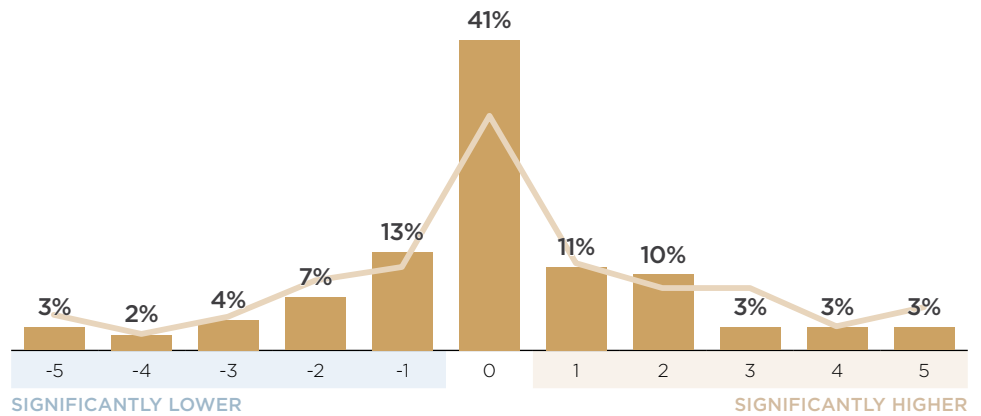
PROJECTS BEING PUT ON HOLD

BASE: 449

2026
Net +0

2025
Net +5
(CALCULATED SCORE)

THE NUMBER OF PROJECTS BEING PUT ON HOLD COMPARED TO 12 MONTHS AGO.



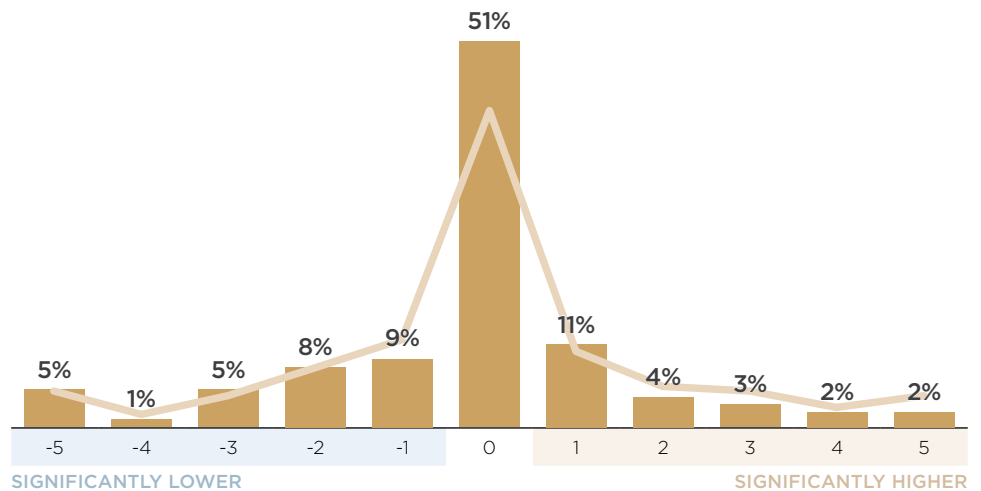
PROJECTS BEING CANCELLED

BASE: 449

2026
Net -6

2025
Net -3
(CALCULATED SCORE)

THE NUMBER OF PROJECTS BEING CANCELLED COMPARED TO 12 MONTHS AGO.

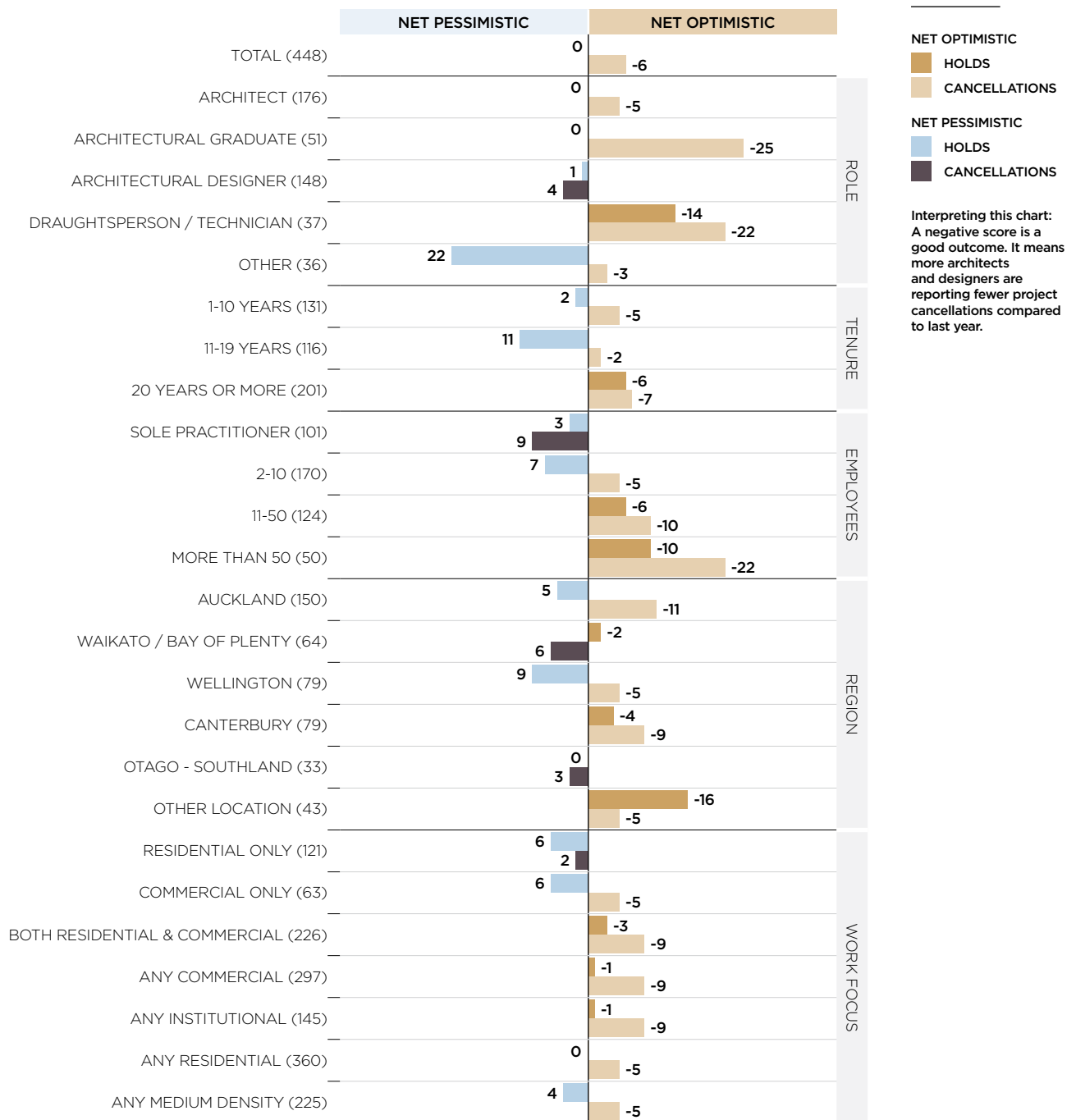


Q: "PLEASE RATE THE CURRENT STATUS OF YOUR BUSINESS IN EACH OF THE FOLLOWING CATEGORIES."

SPECIFIER PIPELINE: PROJECT HOLDS & CANCELLATIONS BY SEGMENT

Small businesses (up to 10 staff) are still seeing an increase in project cancellations and holds year on year, while larger businesses are now turning the corner and

seeing a reduction in both. Auckland and Wellington-based practices are seeing cancellations slow, but holds continue to be an issue.



Q: "PLEASE RATE THE CURRENT STATUS OF YOUR BUSINESS IN EACH OF THE FOLLOWING CATEGORIES:
THE NUMBER OF PROJECTS BEING PUT ON HOLD COMPARED TO 12 MONTHS AGO.
THE NUMBER OF PROJECTS BEING CANCELLED COMPARED TO 12 MONTHS AGO."

SPECIFIER PIPELINE: PROJECT HOLDS & CANCELLATIONS

Fewer designers overall are experiencing project holds or cancellations in 2026. However, among those who are still affected, the volume of impacted projects has increased.

Firms hit by these higher numbers of holds and cancellations tend to be mid-sized (11-50 employees), located in Wellington or the Waikato/Bay of Plenty regions, and operating within the multi-residential or aged care sectors.

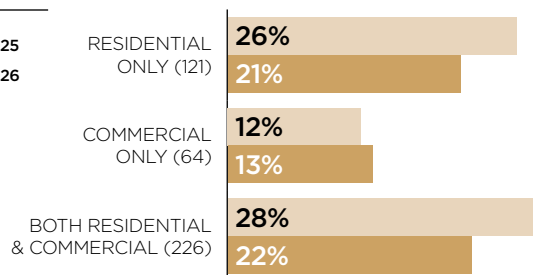
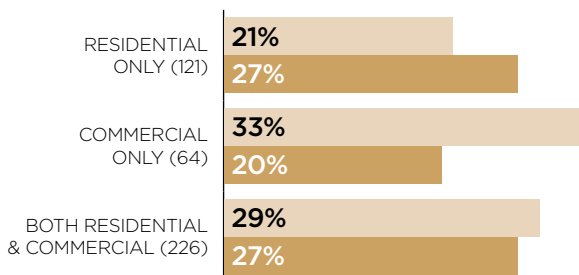
BASE: 189

25% **DOWN 2%**

HAVE HAD AT LEAST ONE PROJECT **DOWNSCALED** SIGNIFICANTLY POST-CONSENT

19% **DOWN 6%**

HAVE HAD AT LEAST ONE PROJECT WHERE **CONSENT HAS LAPSED** AFTER BEING PUT ON HOLD



AMONG THOSE:

6.2 **UP 0.9%**

THE AVERAGE NUMBER OF PROJECTS **DOWNSCALED** SIGNIFICANTLY POST-CONSENT

AMONG THOSE:

3.6 **UP 0.5%**

THE AVERAGE NUMBER OF PROJECTS WHERE **CONSENT HAS LAPSED** AFTER BEING PUT ON HOLD

Q: "PLEASE RATE THE CURRENT STATUS OF YOUR BUSINESS IN EACH OF THE FOLLOWING CATEGORIES:

THE NUMBER OF PROJECTS BEING PUT ON HOLD COMPARED TO 12 MONTHS AGO.

THE NUMBER OF PROJECTS BEING CANCELLED COMPARED TO 12 MONTHS AGO."

CHANGING THE MIX OF WORK

We asked designers how their mix of work was changing in response to shifting demand. Findings are broadly similar to 2025, with 28% stating they have made no changes to their project mix.

In general, firms are following a three-pronged approach: taking on smaller projects, diversifying the types of projects they bid for, and taking on more alterations and additions.

BASE: 491

#1

MORE RENOVATIONS & ALTERATIONS

"Typically we swing into renovations, reworks, and updates."

"Our mix of projects has moved away from multi-unit residential toward standalone builds, alterations, and Certificate of Acceptance (CoA) work."

"We're taking on a wider range of projects, including much smaller remedial works instead of full-scale renovations."

#2

TAKING ON A WIDER RANGE OF PROJECTS

"We're targeting a larger work scope: more minor projects, renovations, DSA, etc."

"We have targeted a wider range of work to fill the gap created by projects currently on hold."

#3

TAKING ON SMALLER PROJECTS

"There's a shift toward smaller packages of work. We're increasingly targeting non-residential developments, such as education refurbishments."

"We are targeting smaller internal renovations rather than larger ones."

"There's more demand for work that can be done under Schedule 1 building exemptions to bypass council processing."

Q: "HOW HAS YOUR MIX OF WORK CHANGED IN THE LAST 12 MONTHS COMPARED TO THE PREVIOUS YEAR?"

HOW ARE SPECIFIERS RESPONDING TO DEMAND CHANGES?

In 2025, staff reduction was the top change designers made in response to shifting demand. In 2026, just 6% of designers mention this.

The focus now is rebuilding project pipelines. Practices are actively investing in marketing, networking, project mix diversification, and workflow efficiencies across systems and standardisation.

BASE: 382

#1

WORKFLOW EFFICIENCIES

This includes:

- improving documentation and processes
- integrating AI tools
- reconsidering core project delivery methods

"We are improving efficiency through greater use of digital tools and BIM workflows, strengthening collaboration across disciplines, and focusing on early risk identification and quality reviews."

"We've focused on streamlining our internal workflows, improving documentation quality, and ensuring that project information is issued clearly and consistently."

#2

NETWORKING AND RELATIONSHIP DEVELOPMENT

This includes:

- in-person networking
- client outreach

"More work with developers on multi-unit builds, and collaborative work with contractors where we are doing design/documentation work for their existing clients."

"Trying to meet as many potential new clients as possible through local events (Chamber of Commerce, local council presentations, etc.)."

#3

DIVERSIFYING FOCUS

This includes:

- exploring different types of work
- securing overseas work
- increasing engagement with developers and contractors

"30% of our team are on secondments with our overseas offices, working remotely on commercial projects in Canada & the UK."

"Managing risk while engaging with the wider community, as well as previous and existing clients. We are also exploring more tendering opportunities."

#4

MORE FOCUS ON MARKETING

This includes:

- business development
- website updates
- developing case studies

"Marketing has become much more important, we're focusing on RFPs and maintenance projects rather than new builds or major alterations and additions."

"We are increasing our marketing efforts and re-connecting with past consultants and clients to see if they can refer people looking for services like ours."

Q: "WHAT, IF ANYTHING, IS YOUR PRACTICE DOING IN RESPONSE TO CHANGES IN DEMAND?"

PROJECT PIPELINE

The net position on new projects and leads has moved into positive territory in 2026, signalling an uptick in early-stage activity.

Compared to builders, the outlook among specifiers is significantly more optimistic, suggesting that the increased activity hasn't yet flowed through to construction.

However while the overall picture is positive, firms still face a struggle to get work confirmed alongside high competition for available projects — it will take time to fully refill the pipeline.

In 2025, designers had an average of 38 projects on the books. This dropped to 30 in 2026.

However, the median number of projects remains at 15 in both years — suggesting that larger practices have a shorter pipeline than in 2025 as projects finish and new leads take longer to convert.

HIGHER RATING = EASIER CONDITIONS

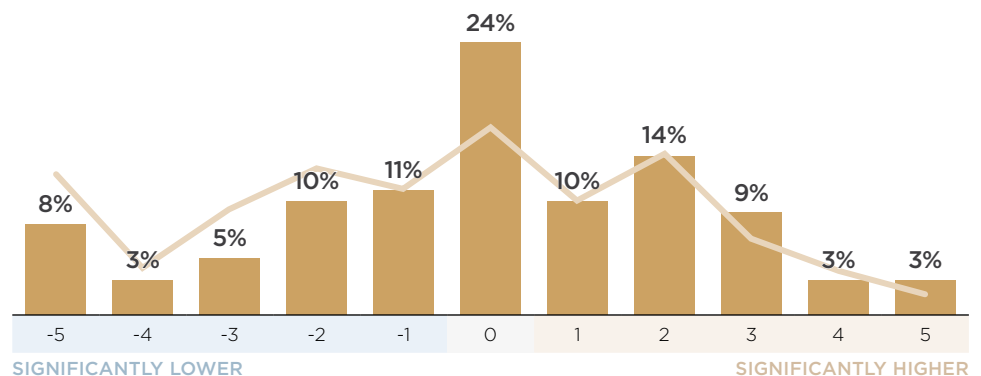
LEADS & ENQUIRIES

BASE: 449

2026
Net +2

2025
Net -13
(CALCULATED SCORE)

THE NUMBER OF NEW LEADS AND ENQUIRIES COMPARED TO 12 MONTHS AGO.



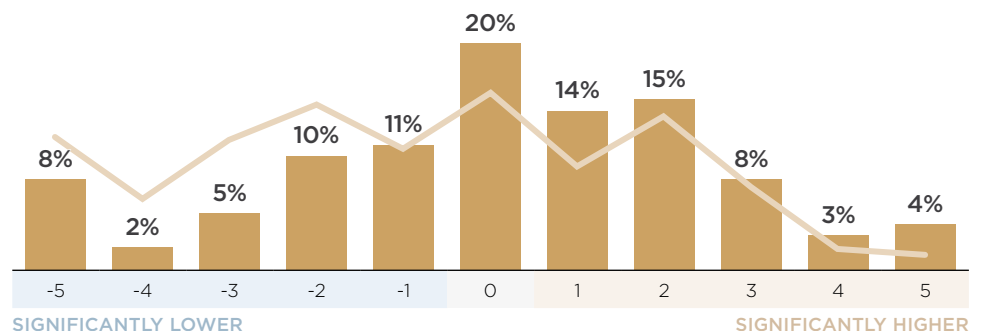
PROJECTS STARTING

BASE: 449

2026
Net +8

2025
Net -21
(CALCULATED SCORE)

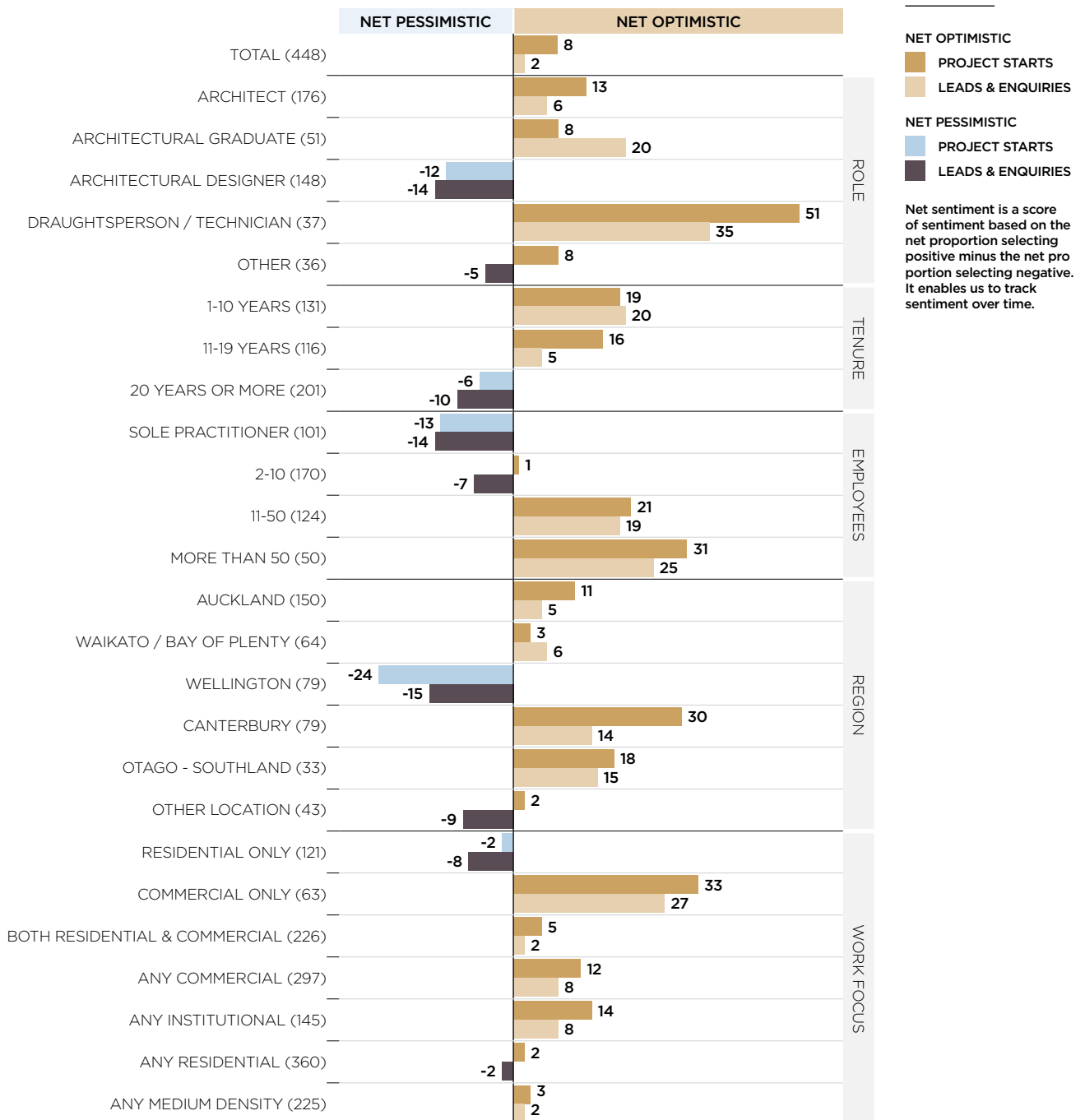
THE NUMBER OF NEW PROJECTS STARTING COMPARED TO 12 MONTHS AGO.



Q: "PLEASE RATE THE CURRENT STATUS OF YOUR BUSINESS IN EACH OF THE FOLLOWING CATEGORIES."

SPECIFIER PIPELINE: PROJECT STARTS & LEADS

Mid-sized through to large practices are seeing an increase in enquiries and new project starts, while sole practitioners are still struggling with a net decrease in their pipelines. As in 2025, Wellington-based practices continue to see declining leads and project starts, as do those focused wholly on residential work.



Q: "PLEASE RATE THE CURRENT STATUS OF YOUR BUSINESS IN EACH OF THE FOLLOWING CATEGORIES:
THE NUMBER OF NEW LEADS AND ENQUIRIES COMPARED TO 12 MONTHS AGO
THE NUMBER OF NEW PROJECTS STARTING COMPARED TO 12 MONTHS AGO."

AMOUNT OF FORWARD WORK

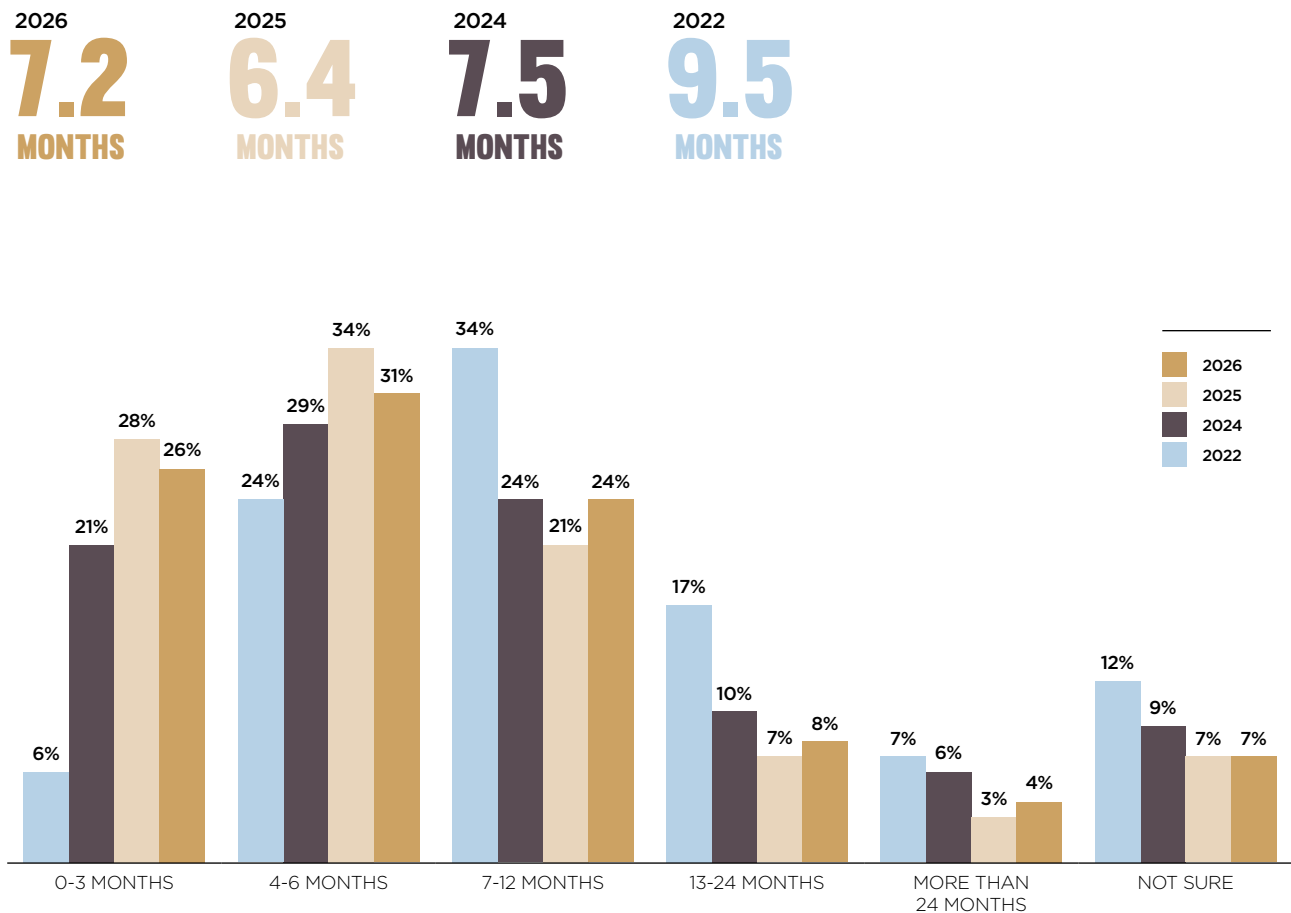
While current workloads are lifting, forward pipelines have yet to fully backfill. Average forward work sits just above 2025 levels at 7.2 months.

A quarter of designers still have three months or less ahead of them; architectural designers, sole practitioners, and those focused on residential work are particularly over-indexed on short pipelines.

By contrast, those in larger firms, focused on commercial work, and in Auckland and Otago/Southland have longer pipelines ahead.

AVERAGE FORWARD WORKLOAD

BASE: 490

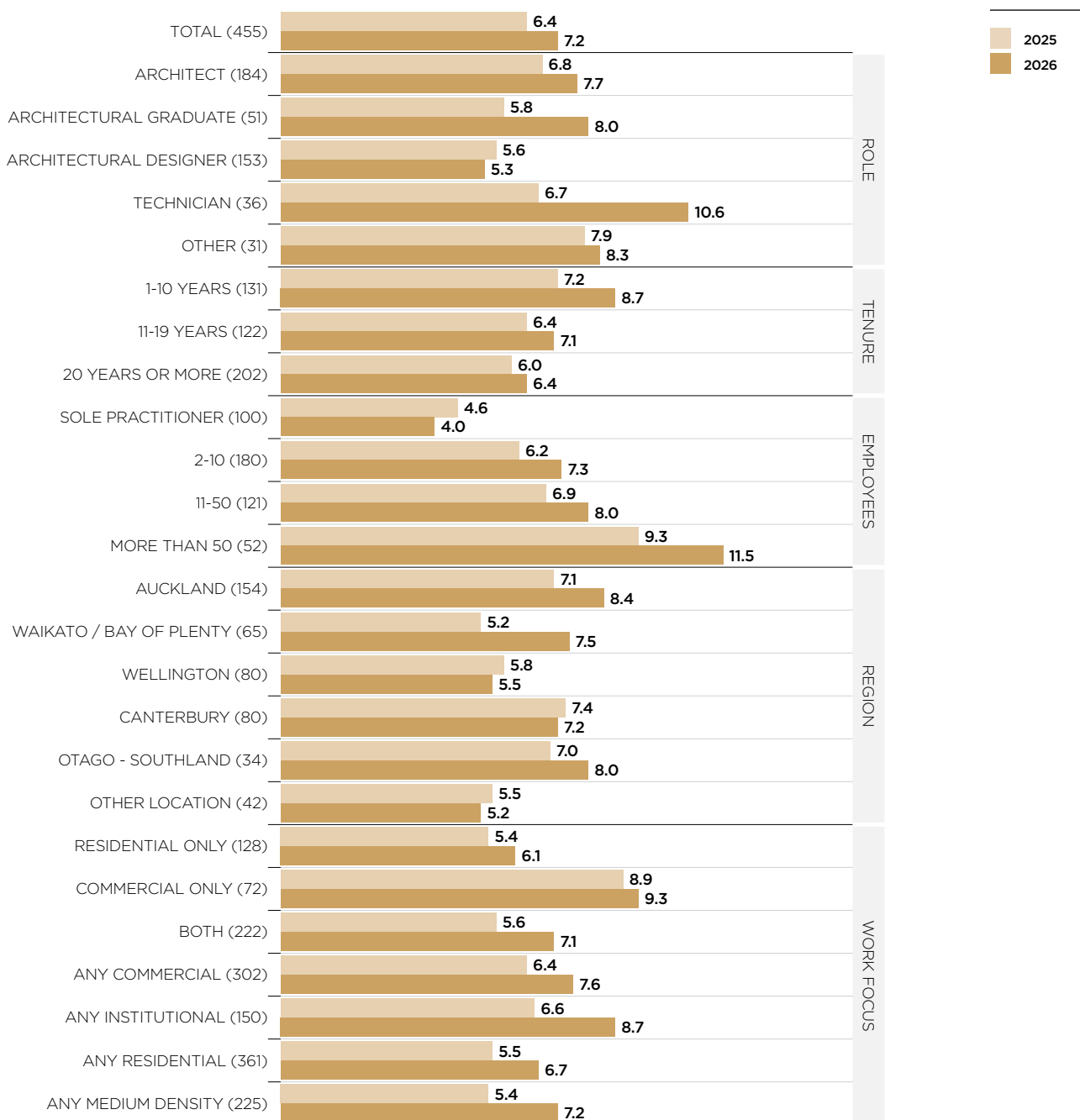


Q: "HOW MUCH FORWARD WORK DOES YOUR PRACTICE HAVE ON ITS BOOKS?"

AMOUNT OF FORWARD WORK BY SEGMENT

The largest practices (50+ employees) report the strongest gain in forward work, now averaging just under a year of secured pipeline. Demand for architectural technicians also appears high, with several respondents noting an uptick in Schedule 1 exemption work as a contributing factor.

AVERAGE FORWARD WORK (MONTHS)



Q: "HOW MUCH FORWARD WORK DOES YOUR PRACTICE HAVE ON ITS BOOKS?"

INDUSTRY OUTLOOK

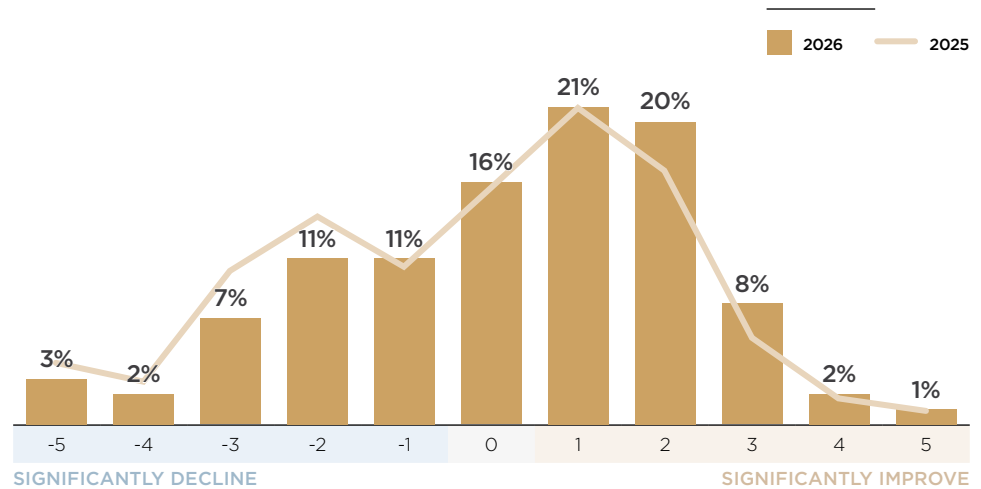
The sentiment for the future is increasingly positive. However, as in 2025, specifiers anticipate only moderate improvement over the next 12 months at best (and some do still expect things to get a little worse).

Once again, those in larger firms and working on commercial projects express more optimism about the industry outlook, while smaller and residentially focused practices remain cautiously positive.

BASE: 366

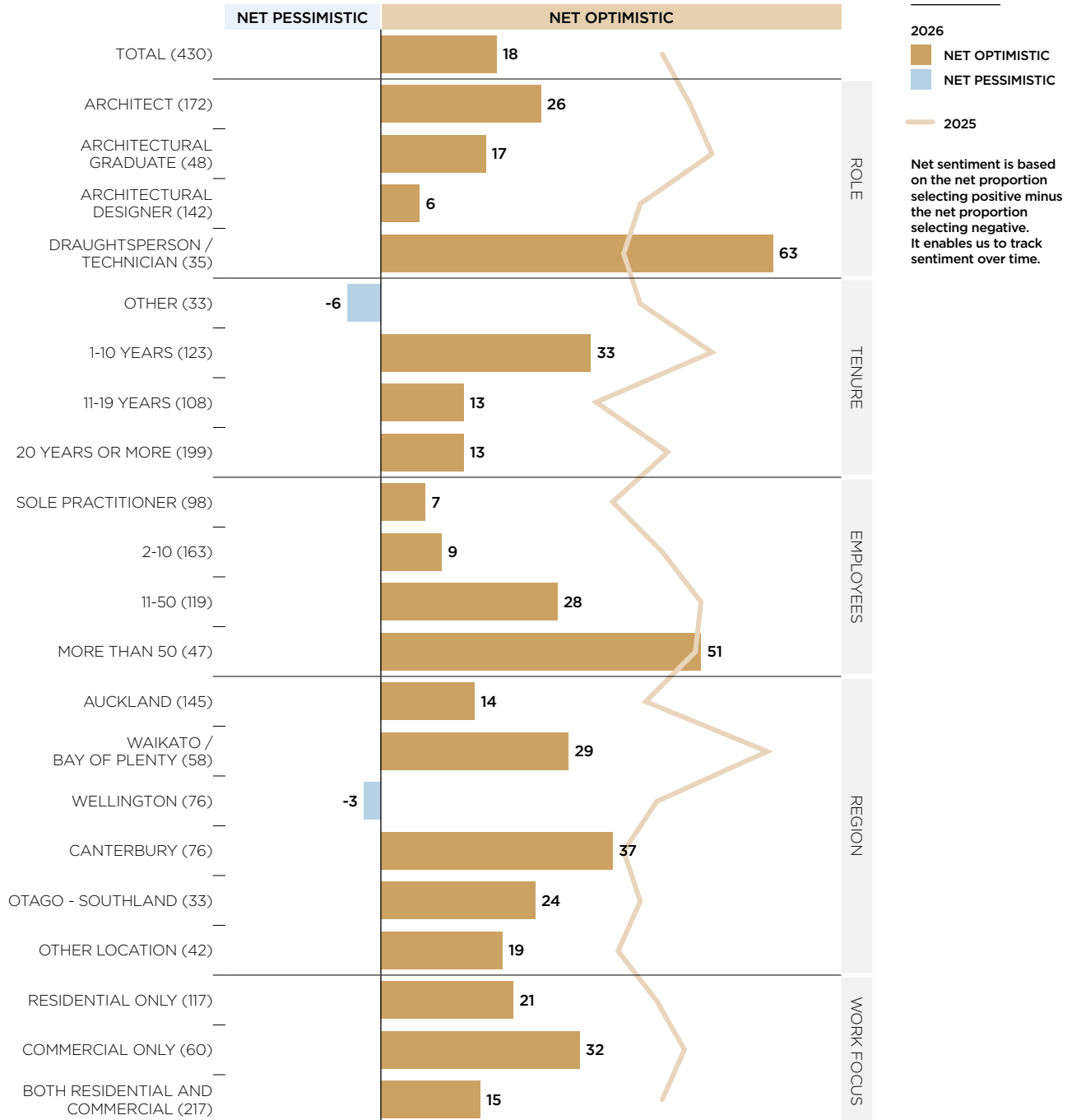
2026
Net +18

2025
Net +5
(CALCULATED SCORE)



Q: "HOW DO YOU ANTICIPATE THE OVERALL CONDITION OF NEW ZEALAND'S CONSTRUCTION INDUSTRY WILL CHANGE IN THE NEXT 12 MONTHS?"

NET SENTIMENT: INDUSTRY OUTLOOK

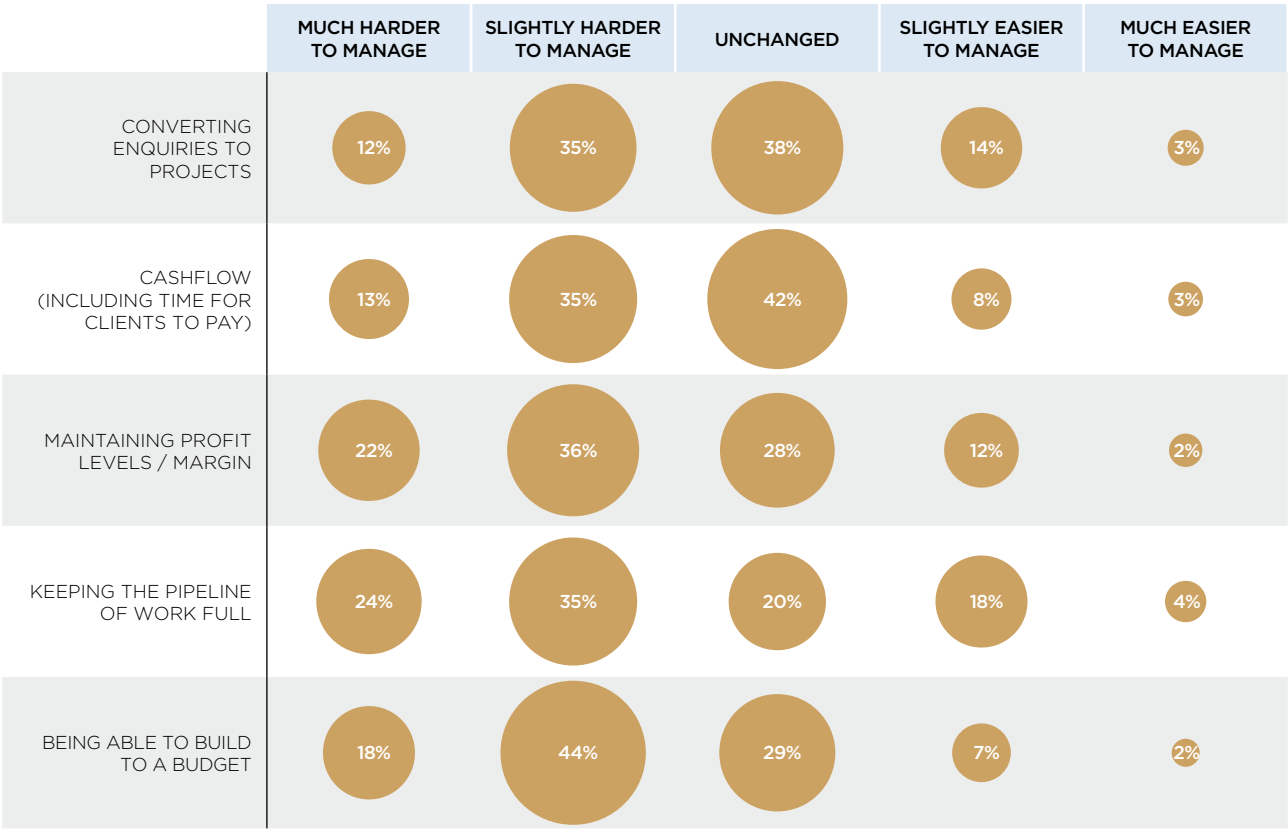


MANAGING THE BUSINESS

Across all aspects, managing the business tends to be harder this year compared to 2025. It is heartening to see around four in ten saying managing cashflow and converting enquiries to projects has stayed the same rather than continuing to worsen. With 22% saying it is easier to keep the pipeline full, there are indicators for improvement in the industry.

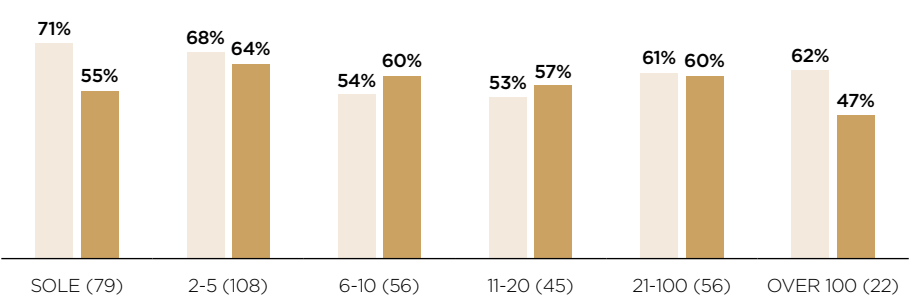
Sole practitioners and larger businesses both show an easing in maintaining profit margin, while mid-sized firms are finding the going even tougher than last year.

BASE: 378



MARGIN PRESSURE: % FINDING IT HARDER (MUCH / SLIGHTLY)

2025
2026



Q: "FOR EACH OF THE AREAS LISTED, PLEASE ASSESS WHETHER THEY ARE EASIER OR MORE DIFFICULT TO MANAGE NOW COMPARED TO 12 MONTHS AGO."

STAFFING LEVELS

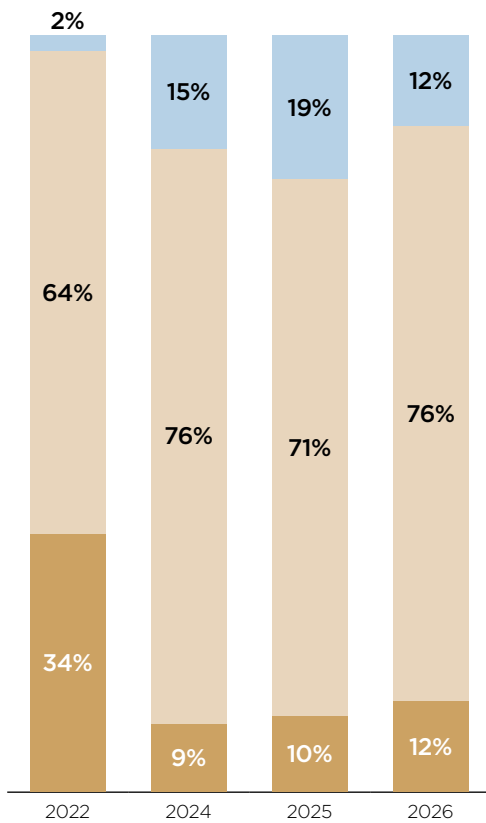
Staffing levels are more appropriately matched to current workloads in 2026 than in 2025 when one in five practices reported having too many staff.

The outlook for future demand tips slightly toward growth, with a net 5% of practices likely needing additional staff. In fact, 36% of large practices (50+ staff)

say they lack sufficient staff for anticipated demand. That pressure is concentrated in the commercial sector, where 28% of commercial-only firms report being understaffed for future work.

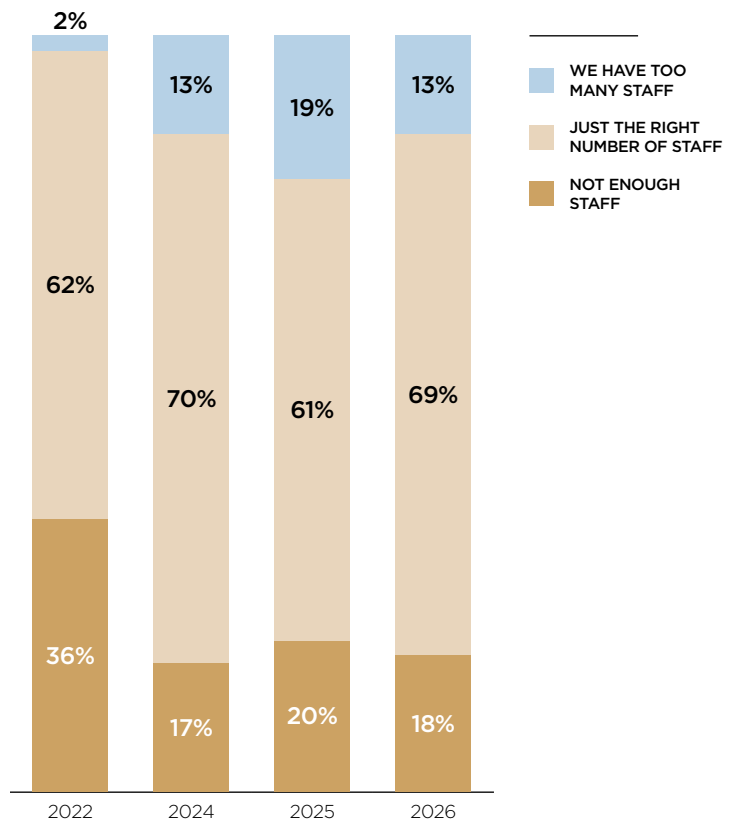
TO MEET CURRENT DEMAND

BASE: 378



TO MEET FUTURE DEMAND

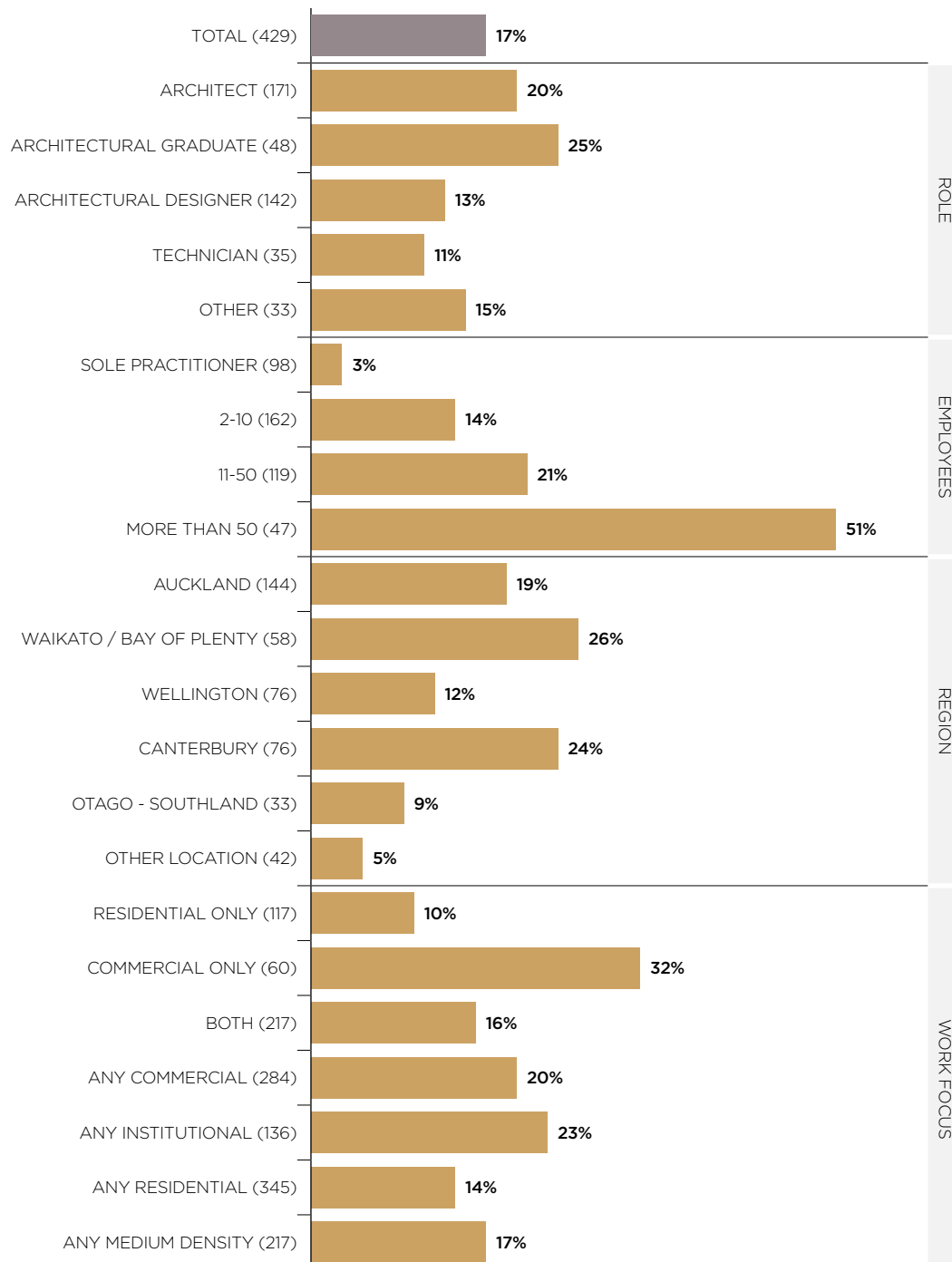
BASE: 378



Q: "WHICH OF THE FOLLOWING BEST DESCRIBES YOUR STAFF SITUATION WITH REGARDS TO BOTH CURRENT AND FORWARD WORK DEMANDS?"

FUTURE HIRING INTENTIONS

Across all practices, 17% are looking to hire staff in the next 12 months, rising to 51% for those with more than 50 staff. In particular, commercial-focused practices show a stronger intention to hire.



Q: "ARE YOU LOOKING TO HIRE STAFF IN THE NEXT 12 MONTHS?"

