

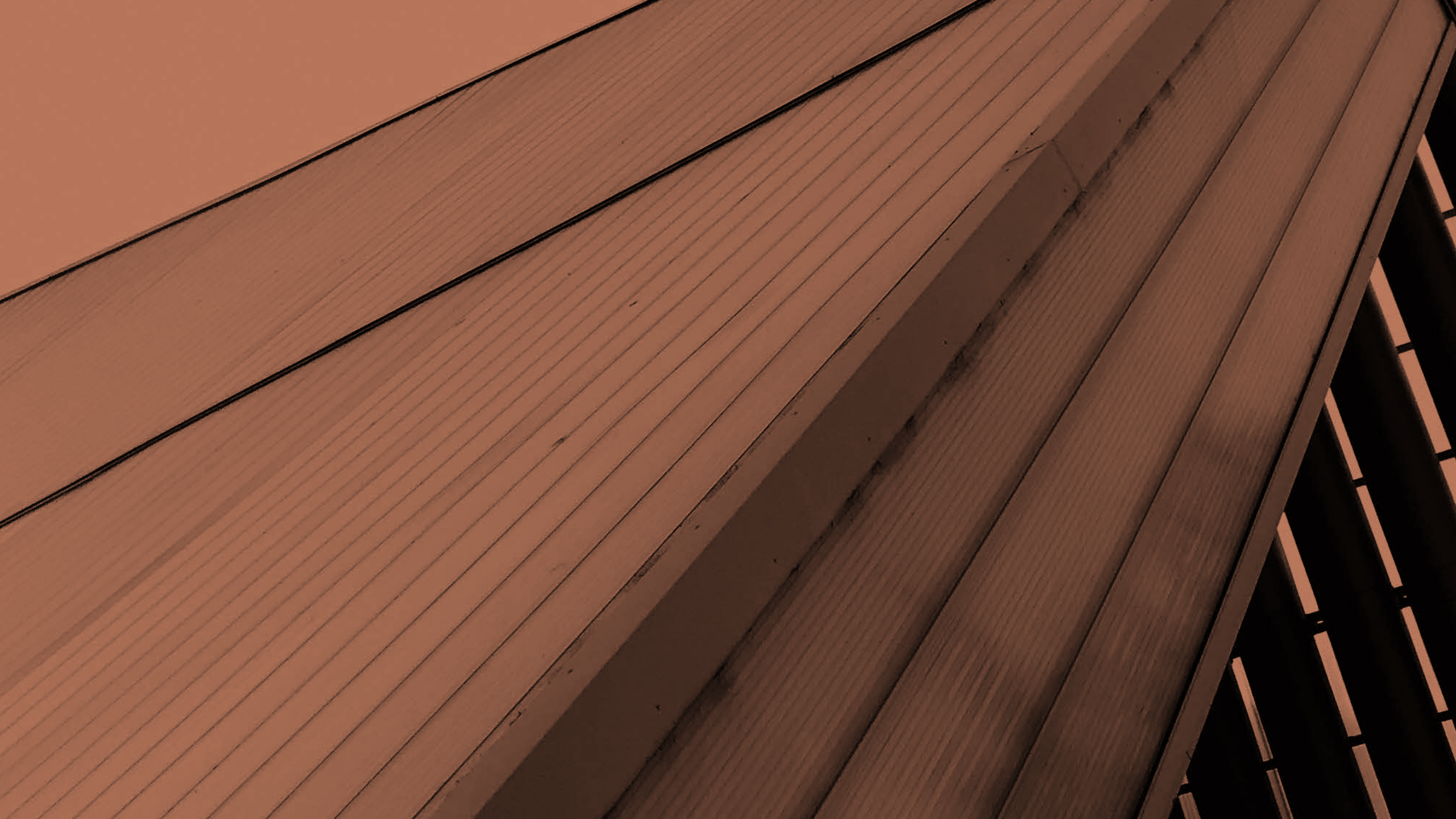


Funded from the
Building Research Levy

2025

ARCHITECT SENTIMENT





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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, biennial 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 June and July 2025.

Note: The ratings in some of the stacked bar charts may not add to 100%. This is due to rounding.

SUMMARY

The construction design industry is currently navigating a challenging landscape, marked by slower demand and a shift in the types of projects being undertaken. This report shows that demand for architects and designers has continued to decrease, with a net demand score of -27 in 2025, indicating a further decline in the market — though this does represent a slowing in the pace of decline. Sole practitioners, those with a residential only focus, and those based in Wellington and Auckland are feeling the slowdown more acutely. Meanwhile, larger businesses with a wider portfolio of work have shown some stabilisation, with net sentiment improving from -57 in 2024 to -4 in 2025.

The pipeline for new projects and leads remains negative, although the rate of decline has slowed compared to the previous year. Architects and designers are working hard to secure new leads, but the mix of projects is often smaller scale

with greater cost pressure. Larger practices are starting to see an increase in enquiries, while sole practitioners continue to struggle with a net decrease in their pipeline. The number of projects being put on hold or cancelled has reached a plateau, with the proportion seeing an increase roughly balanced with those seeing a decrease. However, the overall sentiment remains one of caution and adaption, with many specifiers adapting to the challenging environment by taking on a wider range of projects, including smaller renovations and alterations.

Staffing levels have been significantly impacted, with many practices reducing staff or hours to cope with a decreased demand for their services, and more changes yet to come. Right now, one in five design and architecture practices say they have too many staff to meet current demand, and the same proportion believe they have too many staff to meet future demand. Again there

is evidence of two speeds. 18% of practices are optimistic for the near future, and look to hire staff in the next 12 months. The brain drain is also a concern, with 19% of practices losing staff to overseas, contributing to the difficulty in finding experienced staff.

Looking ahead, there are some positive signs for the industry. The sentiment for the future is more positive than negative, with specifiers anticipating moderate improvement over the next 12 months. Those based in the Waikato/Bay of Plenty and the North Island outside of the main centres are the most optimistic. Financial factors, such as positive changes in interest rates and government incentives, are seen as likely to have a positive impact on the industry over the next two years. Additionally, there is increased interest in adaptive reuse or repurposing of existing buildings, which could provide new design opportunities.

WHO WE SURVEYED

Of the 517 design professionals who responded*

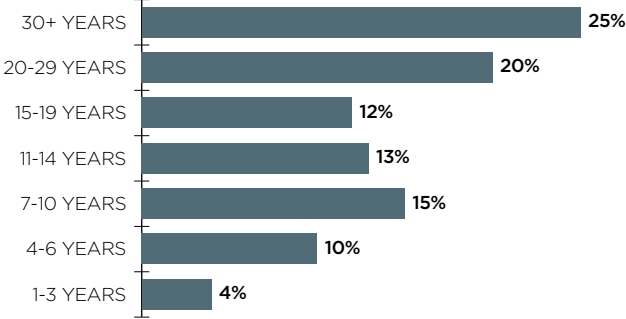
- 34% are architects
- 33% are architectural designers
- 10% are architectural graduates
- 12% are technicians or draughtspeople
- 11% are in other roles

As in 2024, just under half (46%) the specifiers work in small businesses with five or fewer employees.

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

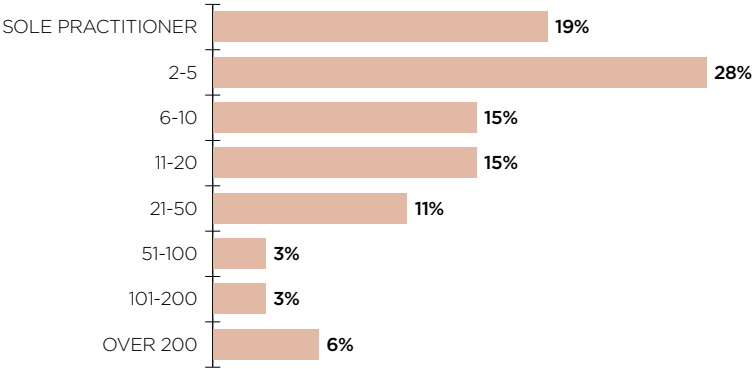
NUMBER OF YEARS IN BUSINESS

BASE: 517



NUMBER OF EMPLOYEES

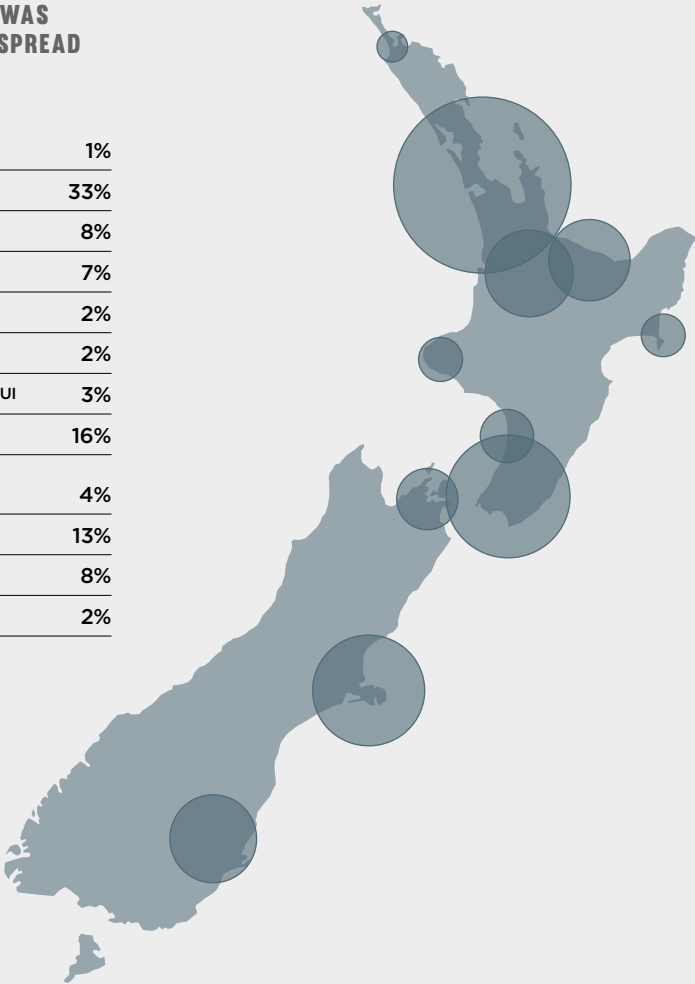
BASE: 515



HOW THE SAMPLE WAS GEOGRAPHICALLY SPREAD

BASE: 516

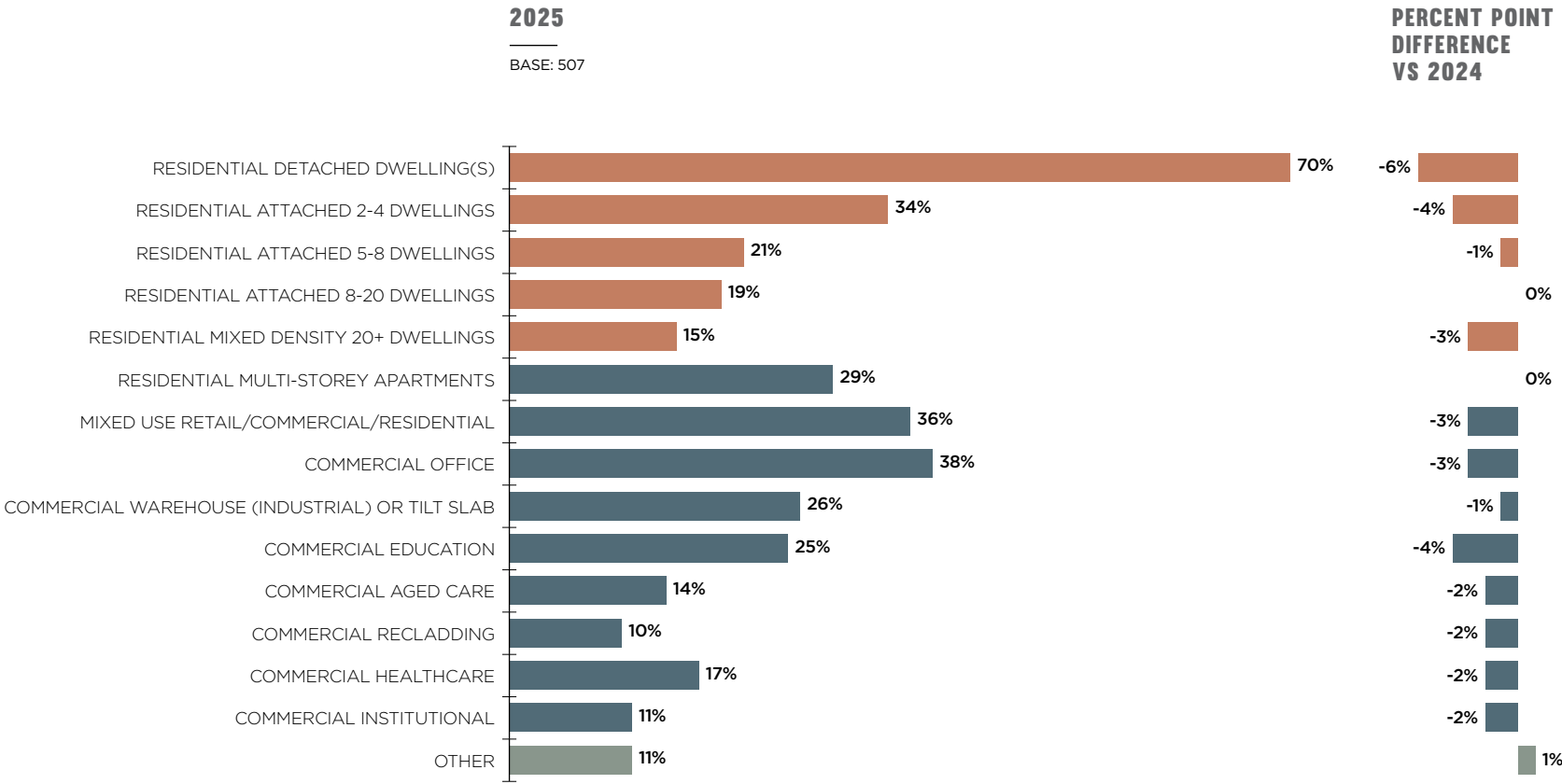
NORTHLAND	1%
AUCKLAND	33%
WAIKATO	8%
BAY OF PLENTY	7%
HAWKES BAY	2%
TARANAKI	2%
MANAWATU - WHANGANUI	3%
WELLINGTON	16%
TASMAN, NELSON AND MARLBOROUGH	4%
CANTERBURY	13%
OTAGO - SOUTHLAND	8%
OTHER	2%



TYPE OF PROJECTS

In 2025, over half (51%) of all specifiers surveyed work on both residential and commercial construction. This represents a gradual decline from 58% in 2022 and 55% in 2024, indicating a narrowing focus among designers over the past three years.

On average, specifiers are now involved in 3.8 different project categories, down from 4.1 in 2024.



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

SHIFTS IN DESIGN DEMAND

Demand for design services remains subdued in 2025. The net-demand index sits at -27, an improvement on 2024 yet still indicating that declines outweigh increases. The proportion describing demand as “significantly lower” has eased slightly.

18% percent of specifiers report demand to be unchanged from 2024, up from 14% last year. By contrast, 55% continue to report lower demand.

The slowdown is felt most acutely by sole practitioners; 17% rate demand as significantly lower than in 2024. Those in Auckland feel that same level of significant slowdown; 17% say that demand is significantly down (rate -5 on the scale).

DEMAND VS 12 MONTHS AGO

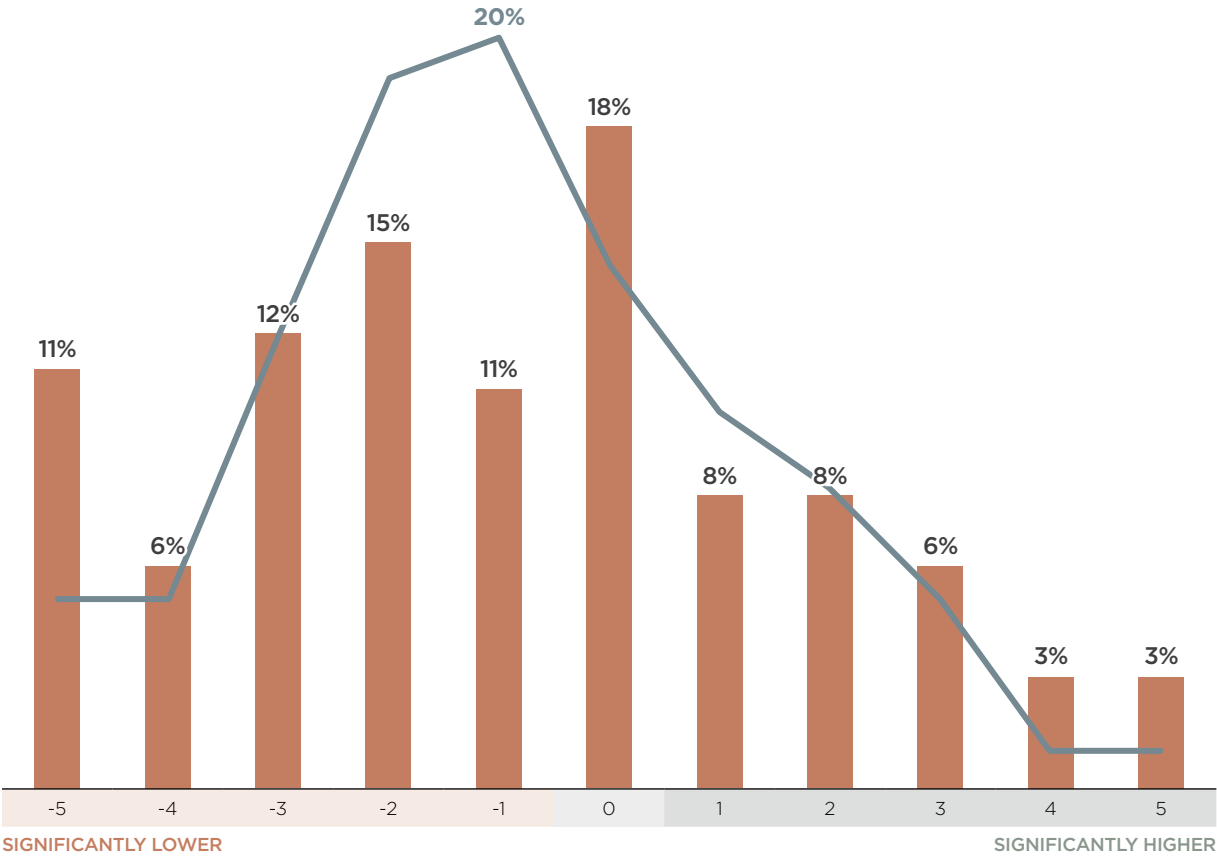
BASE: 412

2025
Net -27

2024
Net -36

(CALCULATED SCORE:
% HIGHER COMBINED
MINUS % LOWER COMBINED)

2025 2024

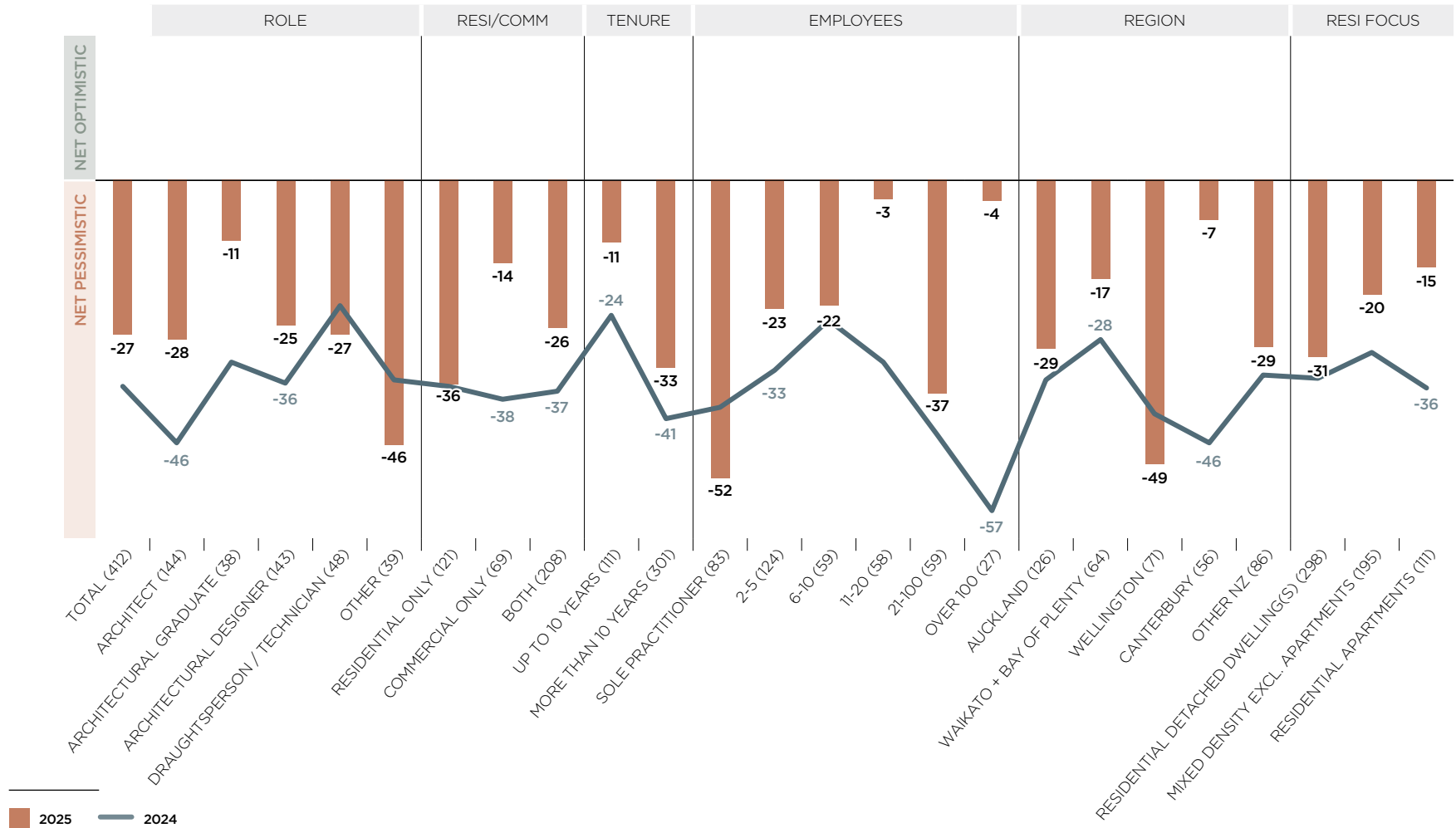


Q: “HOW HAS THE DEMAND FOR WORK AT YOUR BUSINESS CHANGED COMPARED TO THE SAME TIME LAST YEAR?”

NET SENTIMENT: DEMAND VS SAME TIME LAST YEAR

Net sentiment is a score of sentiment based on the net proportion selecting positive minus the net proportion selecting negative. It enables us to track sentiment over time.

Larger practices (100 + employees) show the strongest rebound, with net sentiment climbing from -57 in 2024 to -4 in 2025. In contrast, conditions have softened for sole practitioners (down from -40 to -52) and for Wellington-based specifiers (-41 to -49). Specifiers in Canterbury and the Waikato/Bay of Plenty region show a net improvement and feel more optimistic compared to other regions.



PROJECT PIPELINE

Net demand for new projects and leads remains in negative territory in 2025, but the deficit is smaller than in 2024. Project leads show more promise than new starts, indicating the first signs of increased activity, though this is yet to flow through into projects.

Comments throughout the survey indicate that specifiers are competing hard for every opportunity. Incoming projects are often smaller and more cost-conscious, with clients keeping budgets firmly in mind. This underscores that the market is still challenging even as conditions show tentative improvement.

“Potential clients are shopping around more, not just on proposals but on early stage design; for free too, so it’s to the detriment of the industry.”

ARCHITECT, AUCKLAND,
BOTH RESIDENTIAL &
COMMERCIAL WORK

HIGHER RATING = EASIER CONDITIONS

LEADS & ENQUIRIES

BASE: 399

2025

Net -13

2024

Net -26

(CALCULATED SCORE)

PROJECTS STARTING

BASE: 399

2025

Net -21

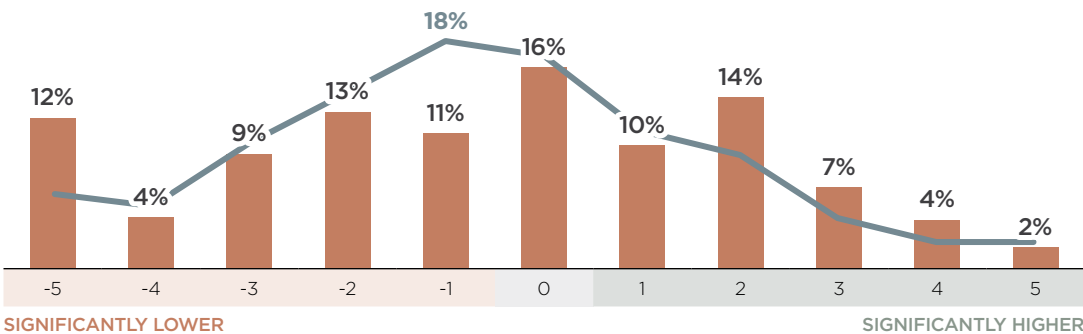
2024

Net -27

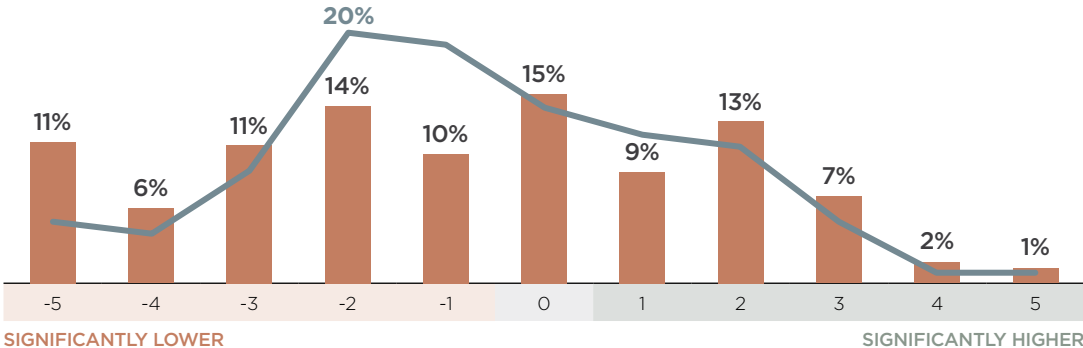
(CALCULATED SCORE)

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.



SPECIFIER PIPELINE: PROJECT STARTS & LEADS

Larger practices are starting to see an increase in enquiries, while sole practitioners are still struggling with a net decrease in pipeline for the near term future. In addition, Wellington-based practices continue to see declining leads and project starts, as do those focused wholly on residential work.

Net sentiment is a score of sentiment based on the net proportion selecting positive minus the net proportion selecting negative. It enables us to track sentiment over time.

NET OPTIMISTIC

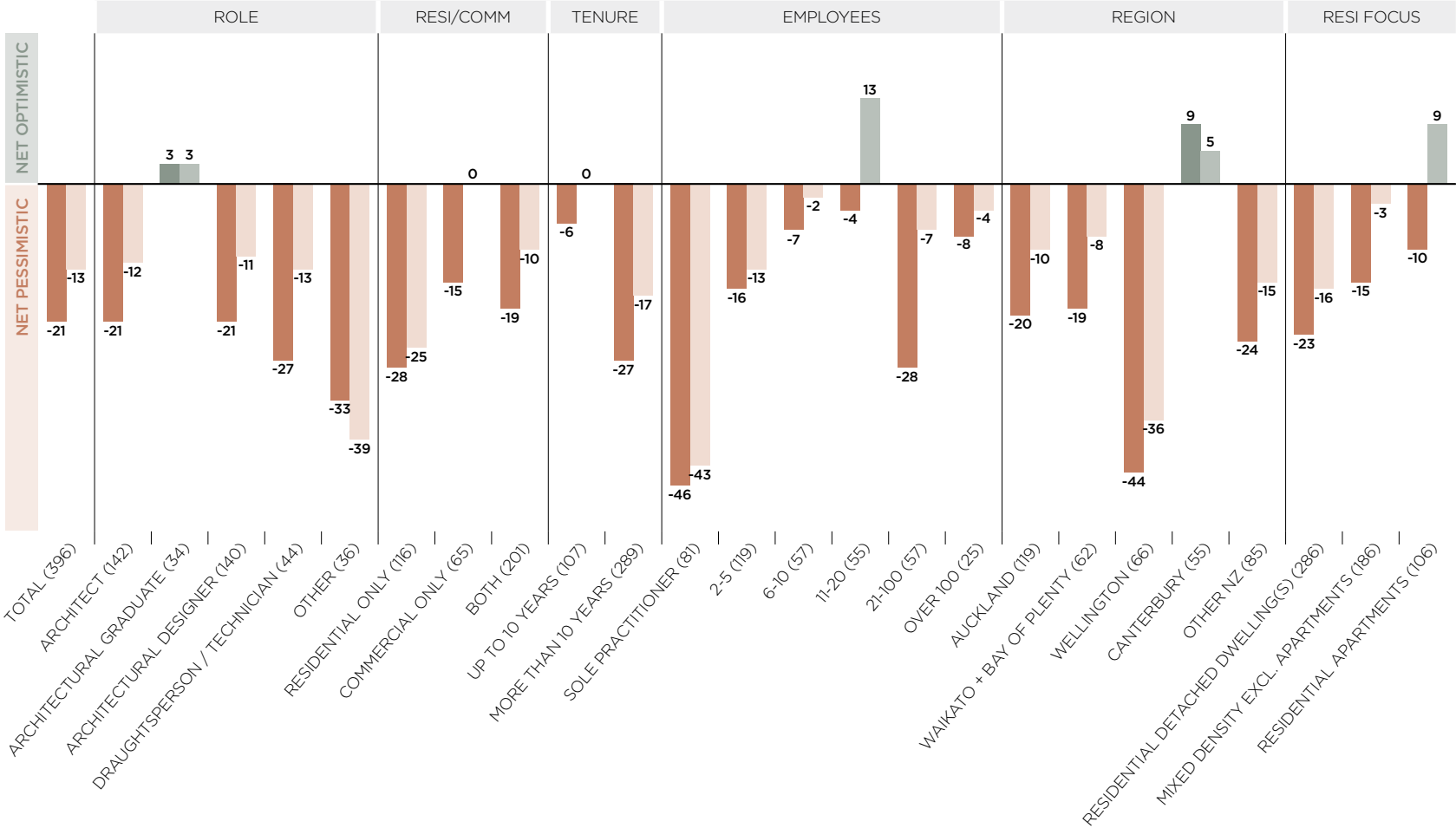
PROJECT STARTS

LEADS & ENQUIRIES

NET PESSIMISTIC

PROJECT STARTS

LEADS & ENQUIRIES



DESIGN PIPELINE

Architects and designers have largely reached a plateau on the number of projects being put on hold and cancelled — the proportion seeing this increase is roughly balanced with the proportion seeing it decrease.

Note that these measures are about how holds and cancellations are changing, not the absolute number of cancellations and holds. A new question later in this document (page 10) addresses total number of cancellations and holds.

HIGHER RATING = TOUGHER CONDITIONS

PROJECTS BEING PUT ON HOLD

BASE: 399

2025
Net +5
2024
Net +32

(CALCULATED SCORE)

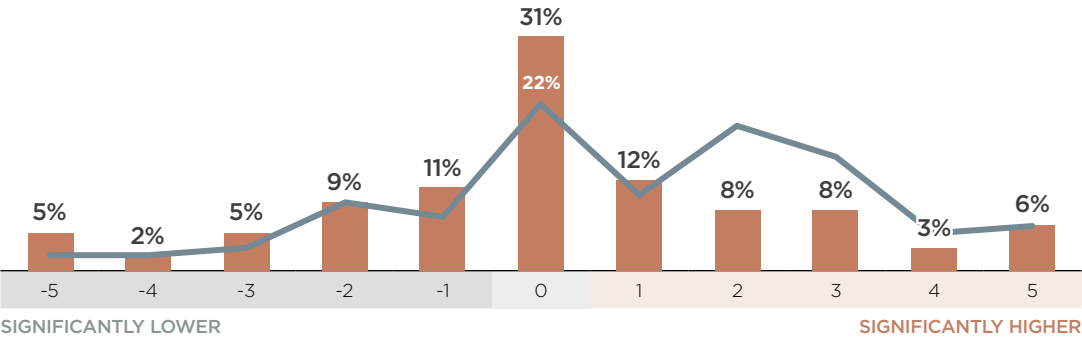
PROJECTS BEING CANCELLED

BASE: 399

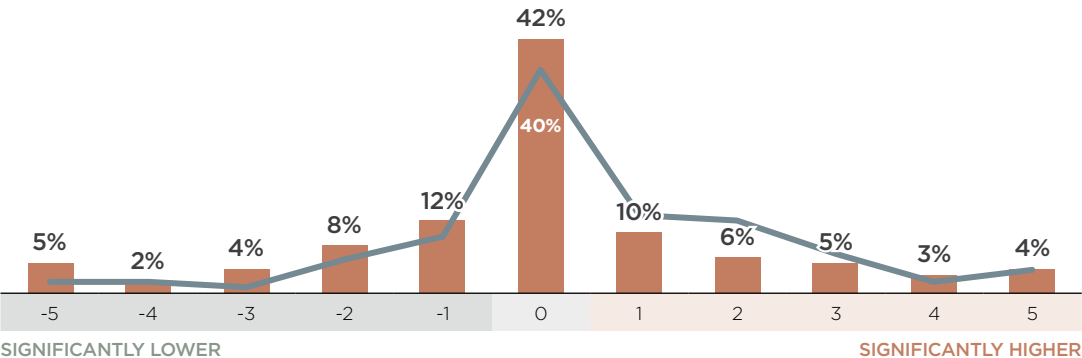
2025
Net -3
2024
Net +20

(CALCULATED SCORE)

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



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



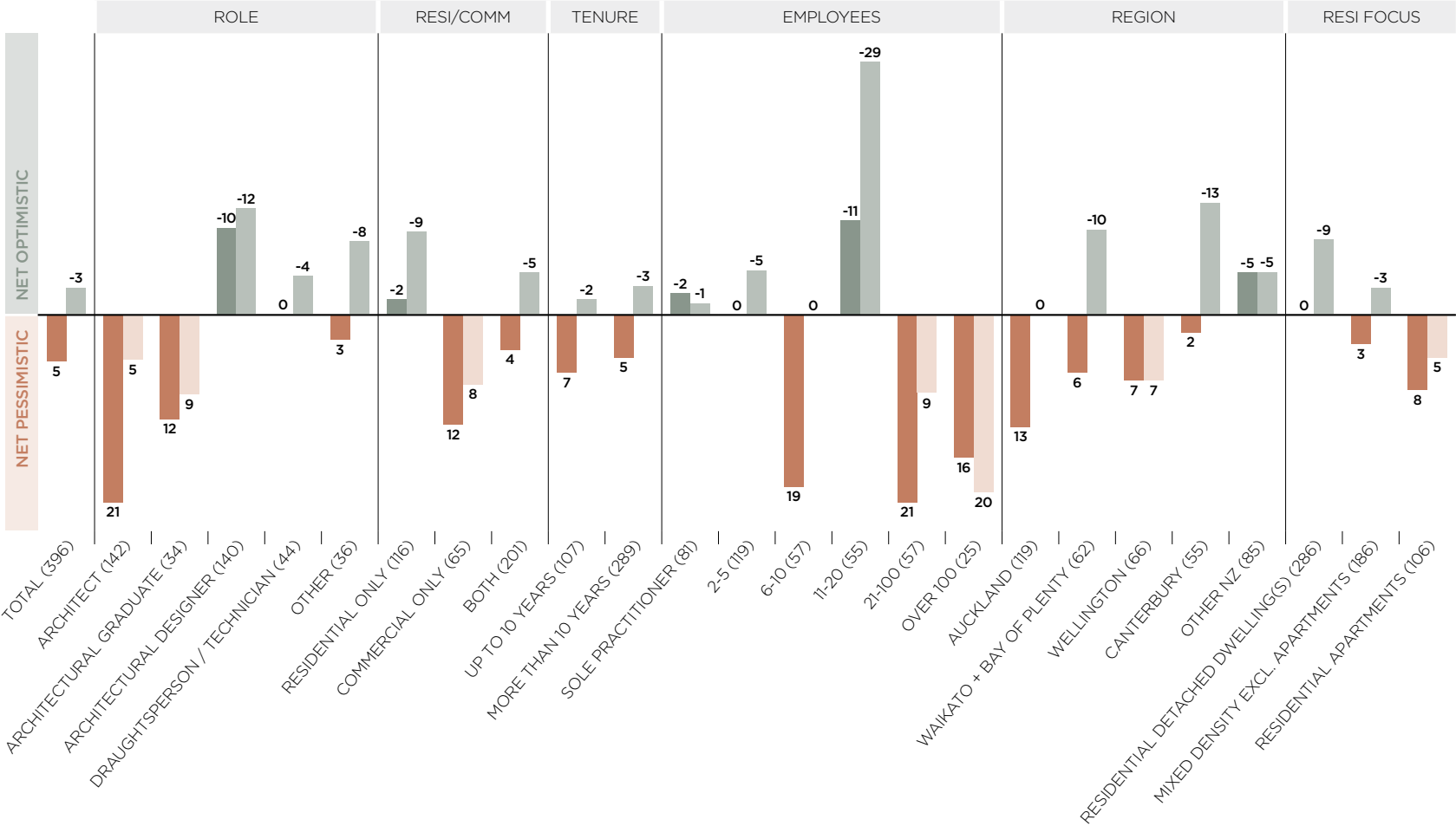
Q: "PLEASE RATE THE CURRENT STATUS OF YOUR BUSINESS IN EACH OF THE FOLLOWING CATEGORIES."

SPECIFIER PIPELINE: HOLDS & CANCELLATIONS

Interpreting this chart: A negative score is a good outcome. It means more architects and designers are reporting fewer project cancellations compared to last year, signalling a healthier market.

Architectural Designers are seeing a net decrease in project holds and cancellations while architectural practices continue to see a year-on-year increase. Similarly, mid sized businesses (11-20 staff) are starting to see the number of project holds and cancellations reduce than compared to 2024, whereas larger practices continue to see these numbers rise.

- NET OPTIMISTIC
- HOLDS
- CANCELLATIONS
- NET PESSIMISTIC
- HOLDS
- CANCELLATIONS



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

SPECIFIER PIPELINE: PROJECT HOLDS & CANCELLATIONS

42% of specifiers have had projects either significantly downscaled or lapsed after consent. The number of projects impacted increases with firm size and is more pronounced in commercial work than in residential.

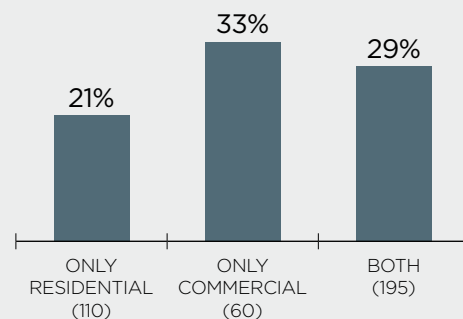
This is a new measure which will enable us to compare critical early indicators of demand and project commencement.

BASE: 379

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

27%

have had at least one project
downscaled significantly post-consent



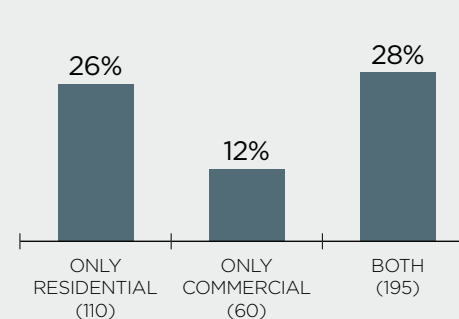
AMONG THOSE:

5.3

The average number of projects
downscaled significantly post-consent

25%

have had at least one project where **consent**
has lapsed after being put on hold



AMONG THOSE:

3.1

The average number of projects where
consent has lapsed after being put on hold

CURRENT CAPACITY ARCHITECTS ARE WORKING AT

Across the 2022, 2024, and 2025 surveys we asked specifiers to gauge what level of capacity they were at given the resources in their business at that time. Many have since streamlined staffing, so today's lower utilisation is measured against a leaner base.

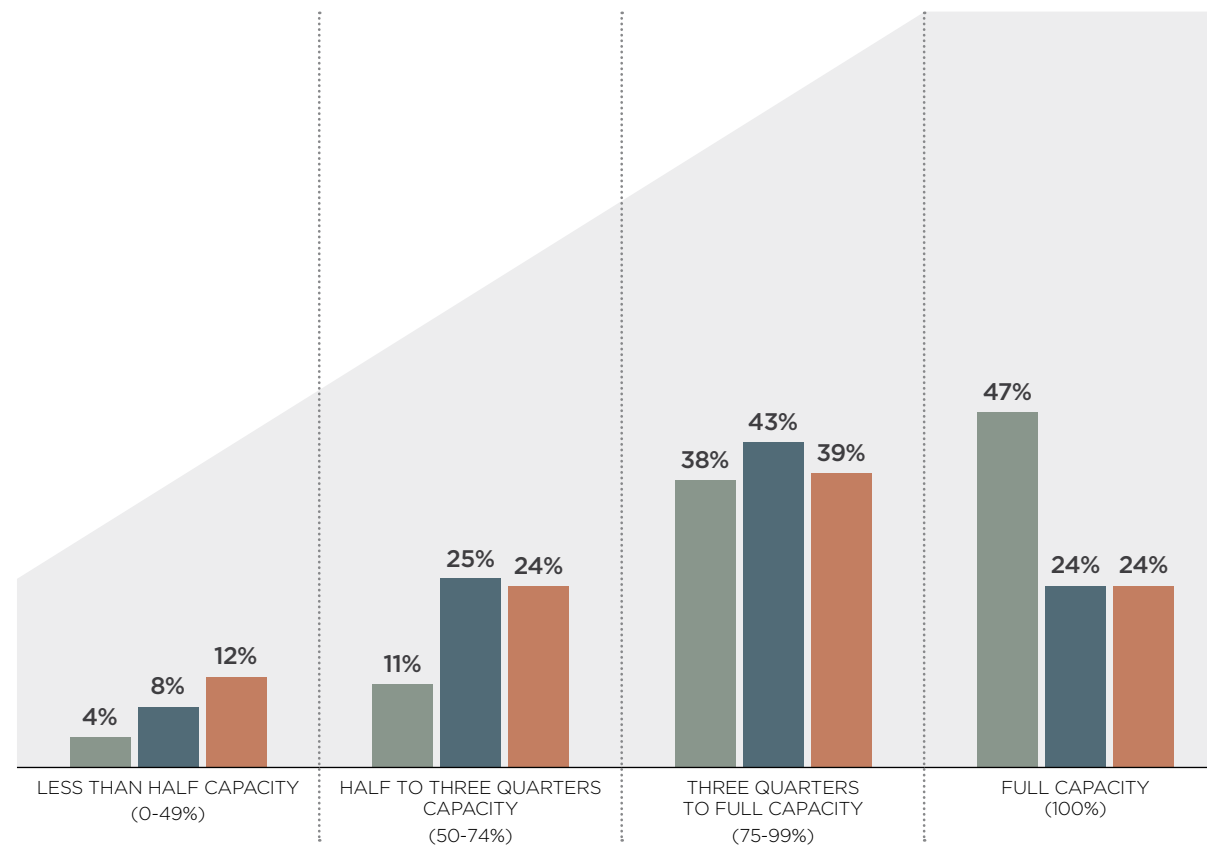
Average workload has eased from 87% at the height of the 2022 boom to 74% in 2025. In particular, the proportion saying they are at 0-49% capacity has tripled from 4% in 2022 to 12% in 2025.

CAPACITY ON AVERAGE

BASE: 412

74%
77%
87%

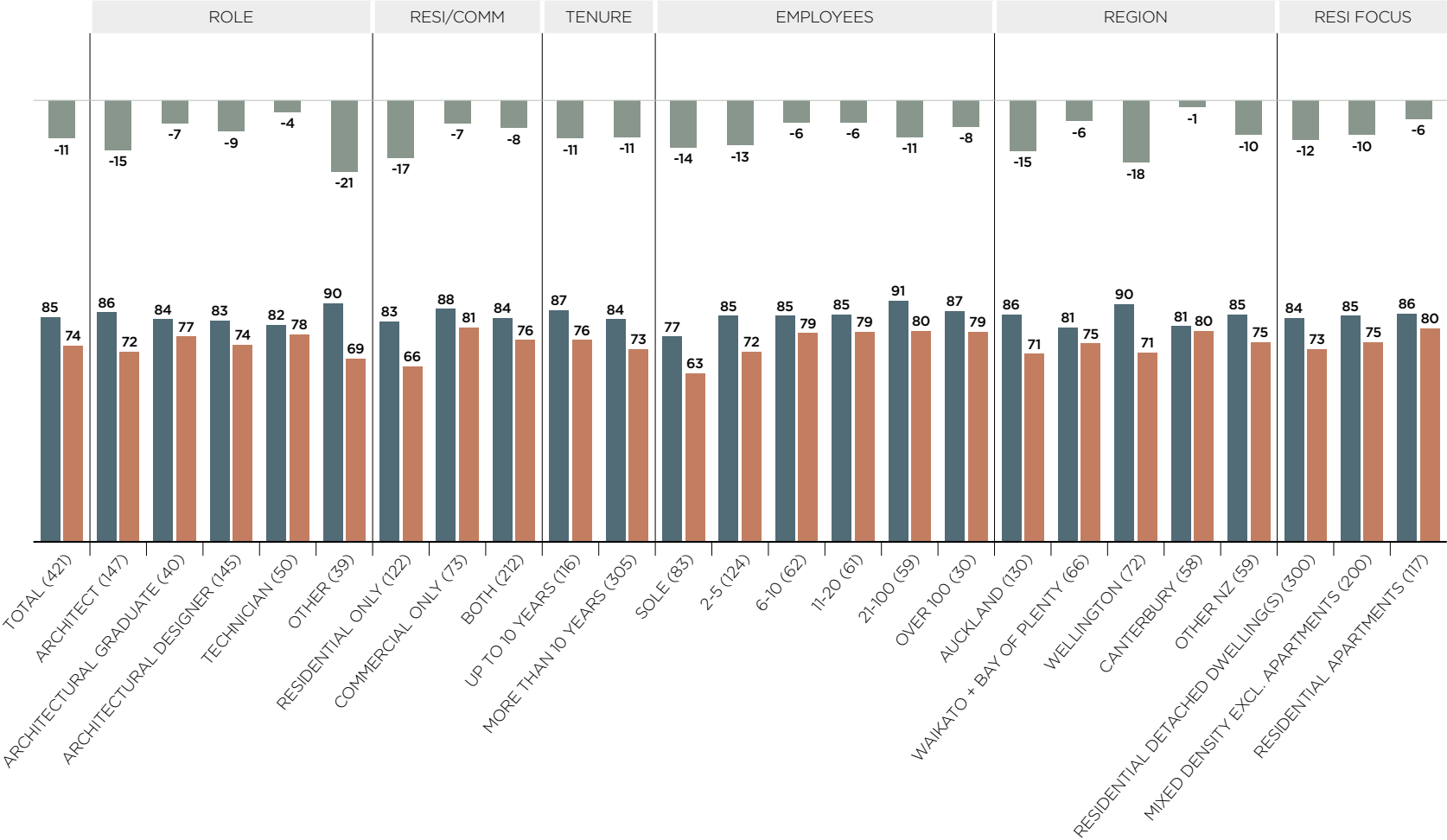
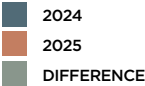
2025
2024
2022



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

SPECIFIER AVERAGE CAPACITY %

Specifiers focused on residential projects, firms with fewer than six staff, and those based in Auckland or Wellington are feeling the slowdown most. Sole practitioners are the hardest hit, operating at just 63% of capacity — the lowest utilisation across all sub-groups.



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

AMOUNT OF FORWARD WORK

The proportion of specifiers with up to three months of work ahead has increased in 2025, now sitting at 28%. 62% have no more than six months of forward work on the books – double the share recorded in 2022.

This tightening pipeline has shaved another month off the average workload ahead, which now stands at 6.4 months.

The shortfall is most pronounced in Wellington and Waikato/Bay of Plenty, where specifiers have, on average, less than six months of confirmed work in hand.

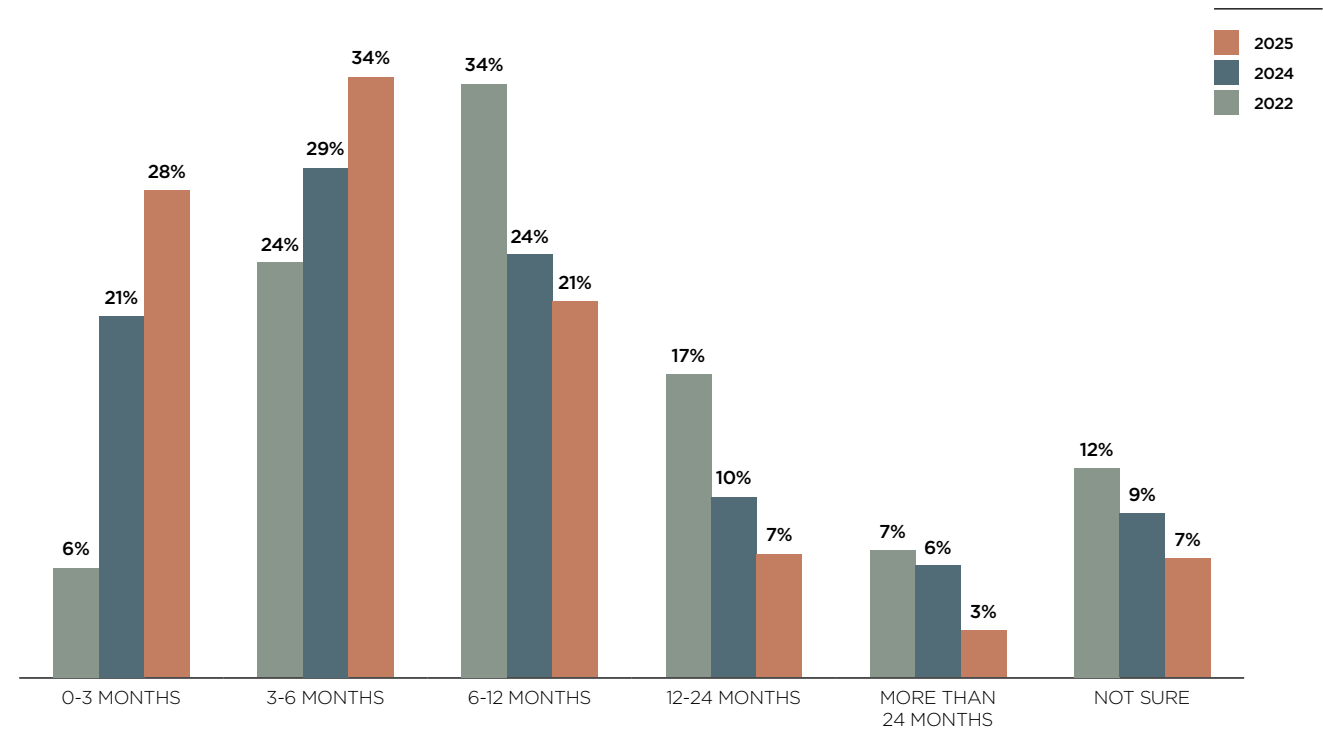
BASE: 412

AVERAGE FORWARD WORKLOAD

6.4 MONTHS

7.5 MONTHS

9.5 MONTHS

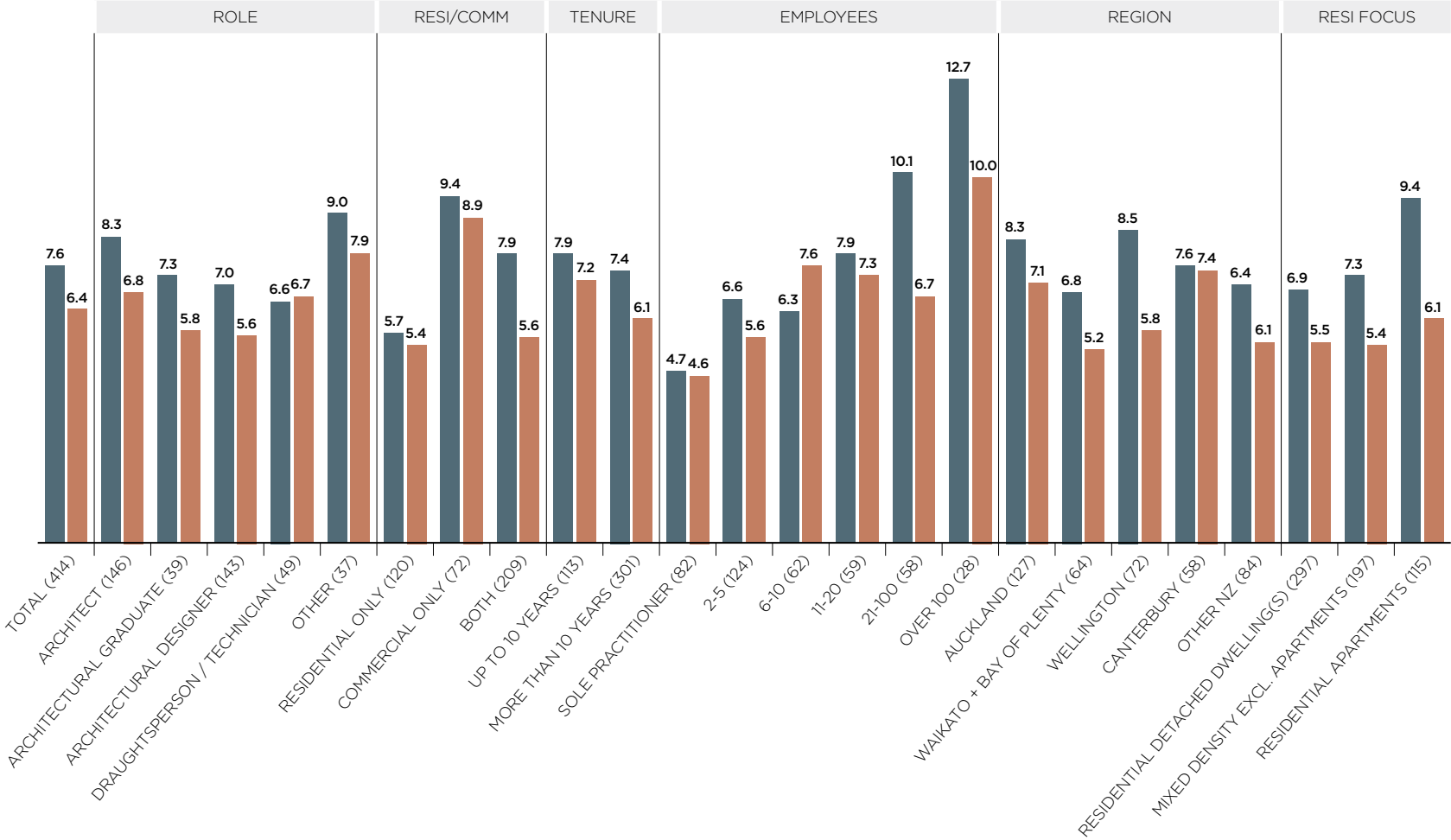


Q: "THINKING ABOUT YOUR PRACTICE, HOW MUCH FORWARD WORK DOES YOUR BUSINESS/PRACTICE HAVE ON ITS BOOKS?"

SPECIFIER AVERAGE AMOUNT OF FORWARD WORK

Scale continues to offer some protection in 2025, though the advantage has narrowed. In 2024, the largest practices held almost three times the forward workload of sole practitioners; this year the gap is smaller. Firms with 21-100 staff still have a solid pipeline – just under seven months of confirmed work – but the difference compared with smaller practices is far less pronounced than it was a year ago.

2024
2025



Q: "THINKING ABOUT YOUR PRACTICE, HOW MUCH FORWARD WORK DOES YOUR BUSINESS/PRACTICE HAVE ON ITS BOOKS?"

CHANGING THE MIX OF WORK

We asked designers how their mix of work is changing in response to softer demand. 31% report no change, but the other seven in ten have adjusted their approach to keep work coming through the door.

This shift is largely about being open to projects they might not have pursued previously; some say they will take anything that comes in, no matter how small. Renovations and alterations now make up 49% of the average workload, increasing to 55% for practices focused solely on residential work.

BASE: 401

#1

MORE RENOVATIONS & ALTERATIONS

“Majority have been renovations, bathrooms, kitchens and one bedroom additions. I’m working on my first new build in over 12 months.”

“High increase in residential renovations. Recognised through the country similar to fight-back from 2009 GFC.”

“We are now willing to take on substantial renovations, and we are registering our interest for more institutional and public work.”

#2

TAKING ON A WIDER RANGE OF PROJECTS

“We are targeting almost any type of work, even projects that we have no expertise in.”

“The last twelve months have been the new constant, prior to the recession I primarily worked in the new residential green building area but now do a bit of everything.”

“Trying to get any work we can at this stage.”

“All areas are down and we are targeting as many as possible currently.”

#3

TAKING ON SMALLER PROJECTS

“We are taking on smaller projects to fill the gaps in time. Typically we would want a whole house project, but will take on a smaller renovation until the bigger jobs come through.”

“Jobs over the last year became smaller and smaller, renovations and building work did not require building consents, leaving me to producing 3D modelling and concept designs for small projects.”

“We are entertaining more piecemeal, scrappy, and drafting-based projects to keep busy.”

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?

The 2025 response closely resembles 2024: firms are sharpening their focus on workforce optimisation, process efficiencies, and targeted marketing. Comments point to a concerted effort to streamline costs and overheads while positioning teams to ramp up output as new work comes through.

BASE: 382

#1

STAFF REDUCTION

This includes:

- Fewer staff
- Reducing specific types of staff
- Reducing staff hours
- Contracting out work
- Not replacing staff

“Most staff are working reduced hours with salary sacrifice. There have also been 2 rounds of restructure where staff have been laid off.”

“Reduce human resources as much as possible and employees are undertaking additional workload, productivity increase by 300 percent. Employees are currently working a 6 day week. No salary increases.”

#2

CLIENT RELATIONSHIP DEVELOPMENT

This includes

- Reaching out to old clients
- Spending more time developing new clients
- Helping clients get cost implications early on

“Working a lot harder to procure work and try and get clients to commit. Design is the easy part, budget and construction costs are the biggest issue.”

“More time with clients trying to progress project through, or even convincing them to start project.”

“Being more front of mind and reaching out to old/new clients.”

#3

MORE FOCUS ON MARKETING

This includes

- Expanding networks
- Personal outreach
- Social media
- Marketing spend

“We are also looking into improving our “marketing” systems as word of mouth is not as good right now.”

“Reviewing sources of new leads, investing more time into marketing, strengthening consultant relationships, reviewing business expenses.”

“Refreshing our brand and relooking at marketing our business out to a wider audience.”

#4

OPERATIONAL EFFICIENCIES

This includes

- Client relationship development
- Engaging and collaborating with trades / consultants
- Supplier relationships

“Enhanced financial planning. Freeze on wage increases.”

“I am looking into our “production” systems so when we get work we are more efficient in delivering them.”

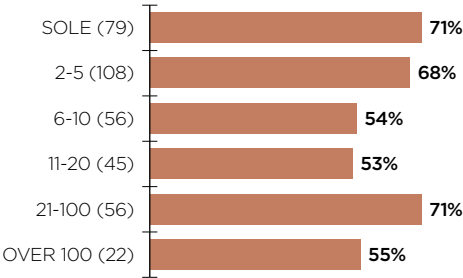
Q: “WHAT, IF ANYTHING, IS YOUR PRACTICE DOING IN RESPONSE TO CHANGES IN DEMAND?”

MANAGING THE BUSINESS

Nearly every facet of running a design practice is tougher than it was 12 months ago. Six in ten firms report that keeping their project pipelines full and protecting profit margins has become more challenging year-on-year.

Maintaining margins is proving particularly difficult for smaller practices and for mid-sized firms employing 21-100 staff.

PROPORTION SAYING MAINTAINING PROFIT MARGIN IS HARDER (MUCH OR SLIGHTLY HARDER)



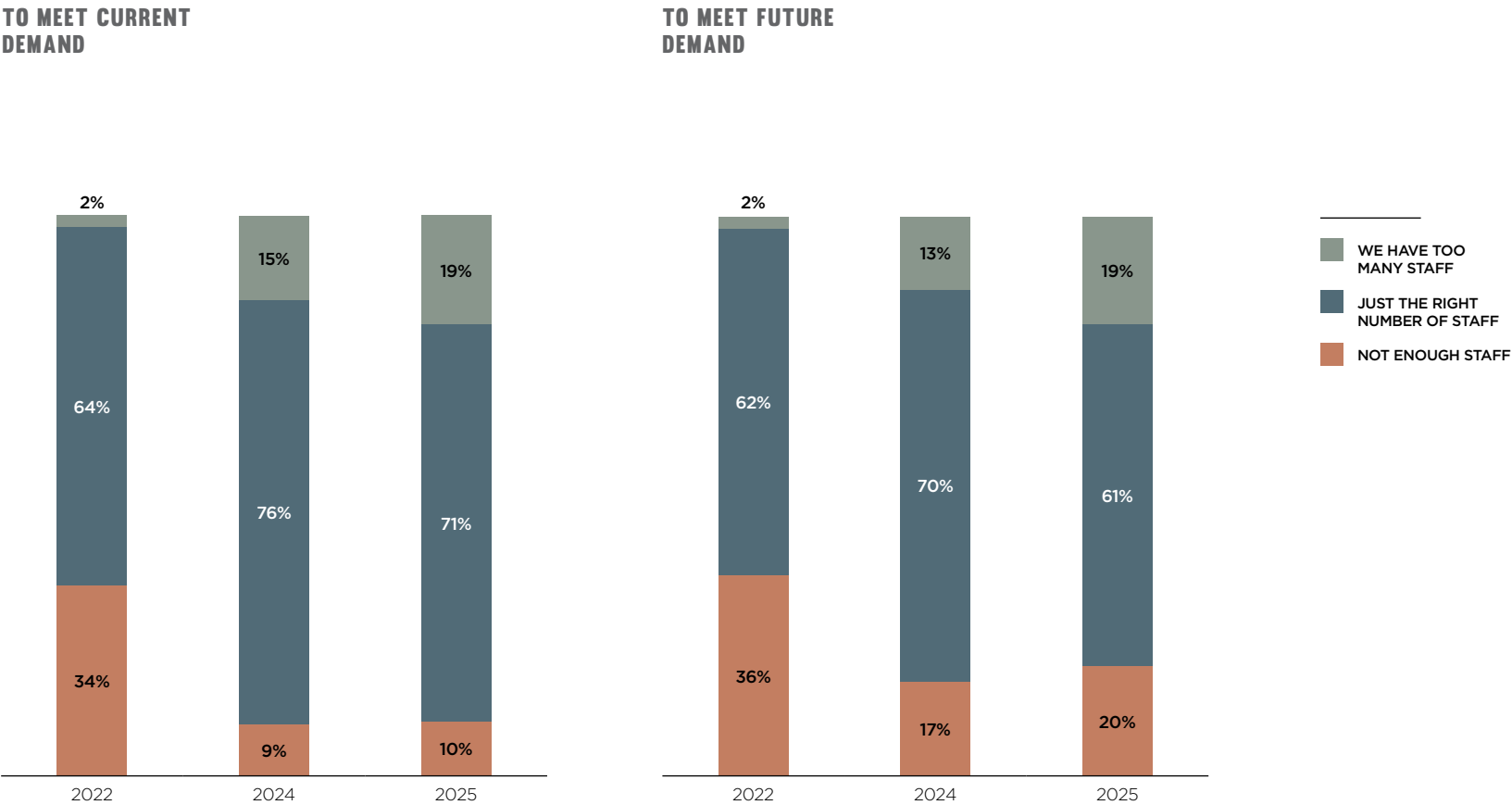
BASE: 368	MUCH HARDER TO MANAGE	SLIGHTLY HARDER TO MANAGE	UNCHANGED	SLIGHTLY EASIER TO MANAGE	MUCH EASIER TO MANAGE	DON'T KNOW
CASHFLOW (INCLUDING TIME FOR CLIENTS TO PAY)	16%	35%	38%	5%	0%	7%
KEEPING THE PIPELINE OF WORK FULL	30%	34%	21%	10%	3%	2%
CONVERTING ENQUIRIES TO PROJECTS	16%	34%	34%	11%	1%	5%
MAINTAINING PROFIT LEVELS / MARGIN	28%	36%	21%	8%	1%	6%
BEING ABLE TO PROVIDE ACCURATE PRICING	12%	29%	41%	11%	2%	5%
BEING ABLE TO DESIGN TO A BUDGET	15%	32%	36%	10%	2%	5%
KEEPING GOOD STAFF	7%	15%	49%	9%	3%	15%
GROWING THE BUSINESS	26%	26%	30%	7%	2%	9%

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

One in five design and architecture practices say they have too many staff to meet current demand, and the same proportion believe they have too many staff for future demand. This will be contributing to some of those concerns about maintaining profit margin, especially given the smaller forward workloads.

However, there is some more positive news on the horizon. One in five say they don't have enough staff for future demand. This is even higher among those focused solely on commercial work (28% say they won't have enough staff), and mid-sized practices with 2-20 staff currently.

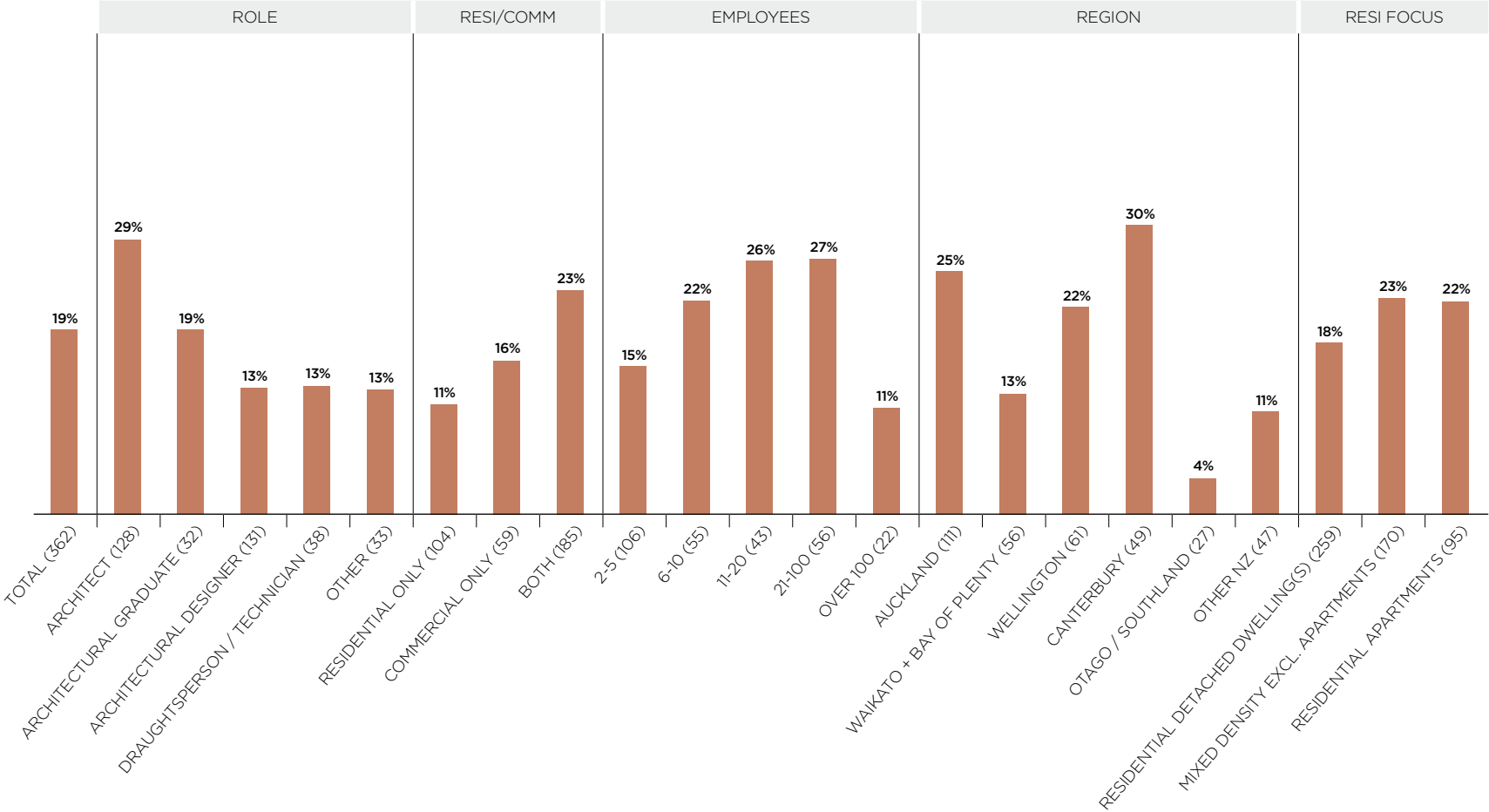


Q: "WHICH OF THE FOLLOWING BEST DESCRIBES YOUR STAFF SITUATION WITH REGARDS TO BOTH CURRENT AND FORWARD WORK DEMANDS?"

TOO MANY STAFF FOR FUTURE DEMAND

19% of practices have too many staff to meet future demand. This is most pronounced in Canterbury and Auckland, and in practices with 20-100 staff.

Provincial New Zealand are less likely to have too many staff, particularly in Otago / Southland where just 4% say they have too many staff and 11% say they don't have enough staff for future demand.



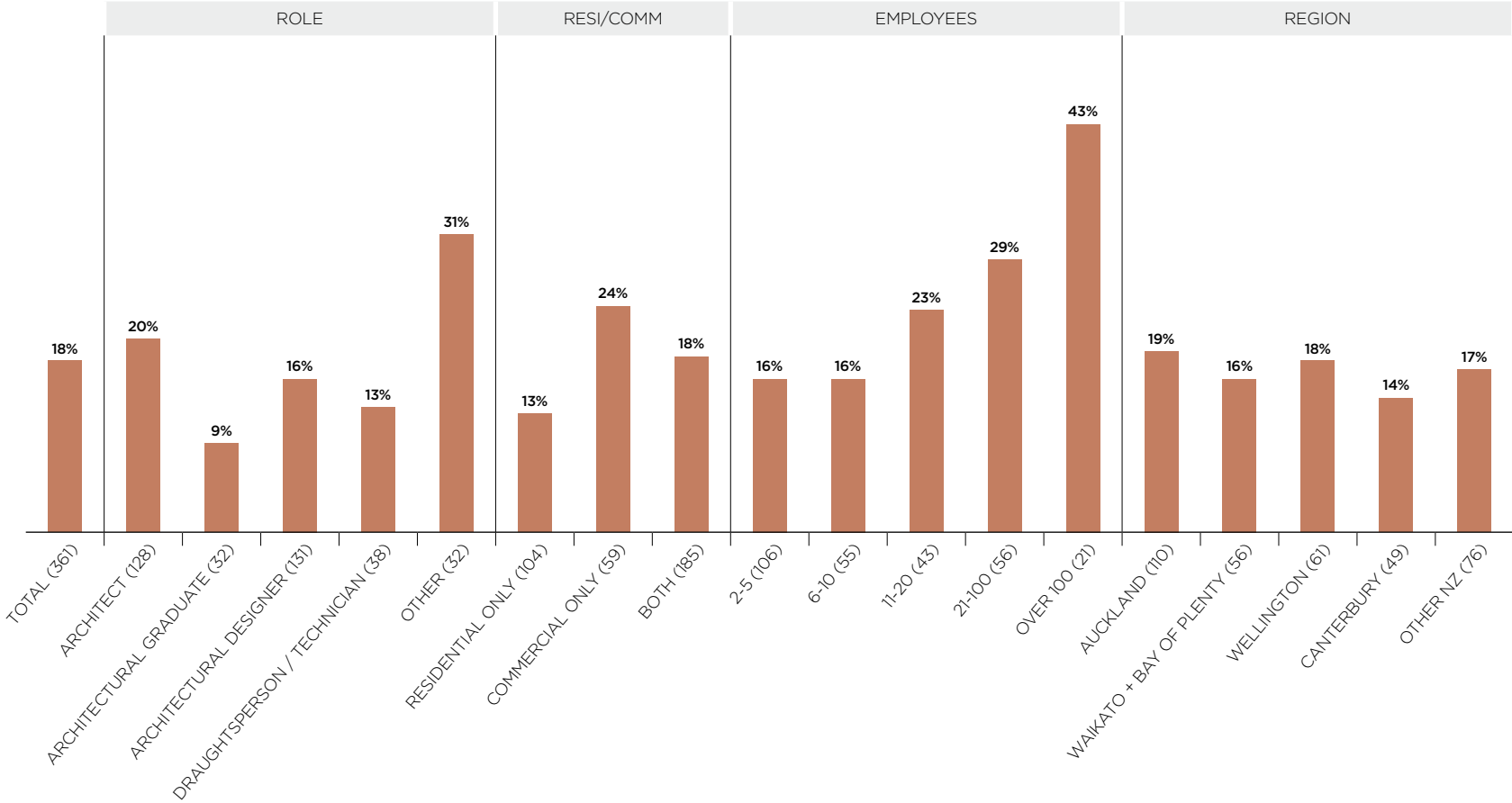
Q: "WHICH OF THE FOLLOWING BEST DESCRIBES YOUR STAFF SITUATION WITH REGARDS TO BOTH CURRENT AND FORWARD WORK DEMANDS?"

FUTURE HIRING

18% of practices are looking to hire staff in the next 12 months, jumping to 43% of those with 100 or more staff now. Those focused on commercial projects have a greater intention of hiring.

Those looking to hire staff are most likely to do hire in the next six months; 49% said they'd hire in this timeframe, 12% said they were looking to hire now, and 29% said they'd hire in 7-12 months (the remainder were unsure). Almost six in ten (58%) looking to hire expect to experience at least some difficulty in finding good staff.

Those hiring staff are most often looking for qualified technicians (74%) or graduates (52%), though 35% are looking for project architects and 14% are looking for admin staff.

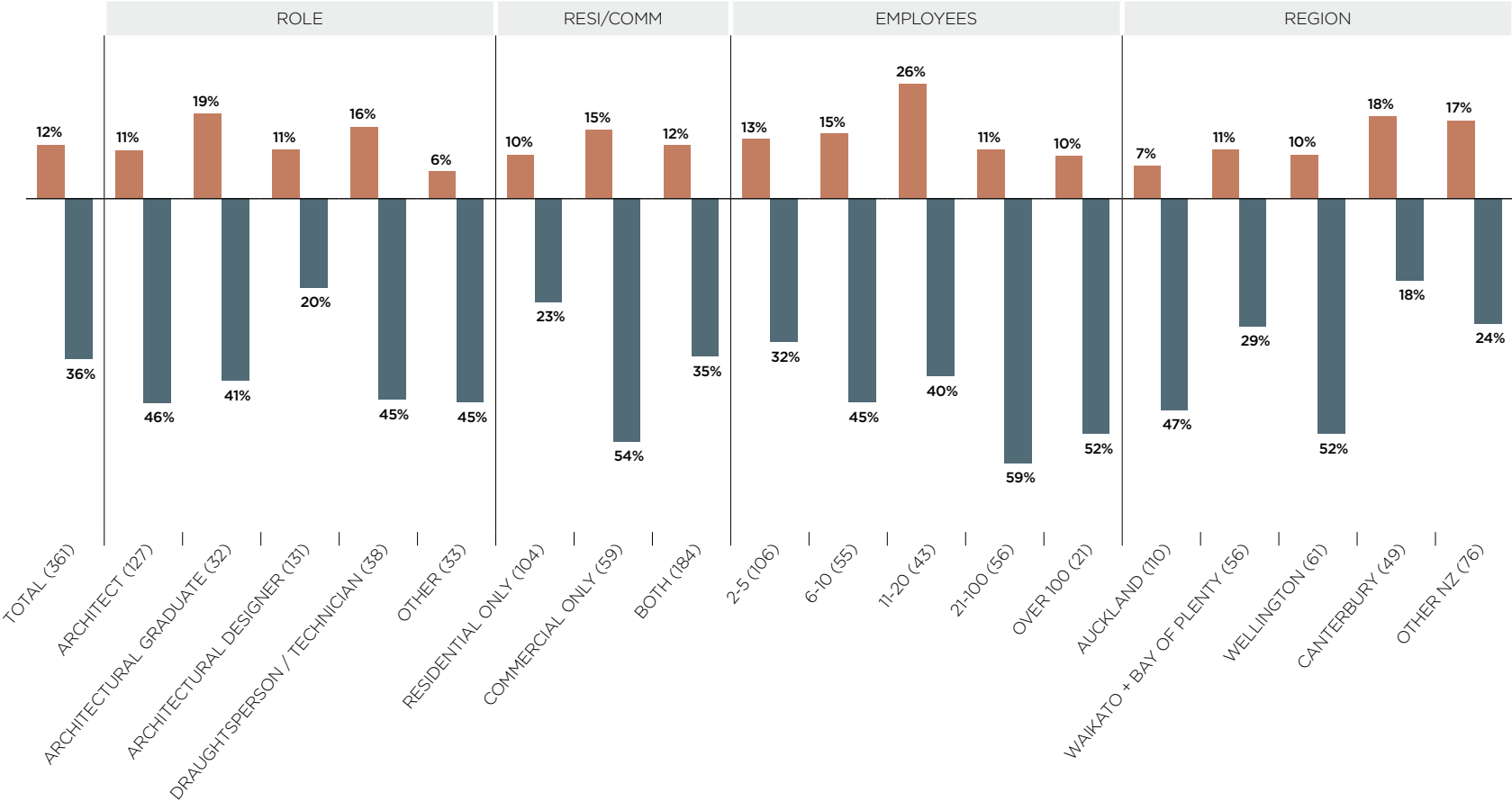


Q: "ARE YOU LOOKING TO HIRE STAFF IN THE NEXT 12 MONTHS?"

EMPLOYEE NUMBERS

More than a third of practices have lost staff in 2025, and just 12% say they have gained staff.

Large businesses are far more likely to have lowered headcount over the last 12 months; more than half of those with 20 or more employees have lost headcount.



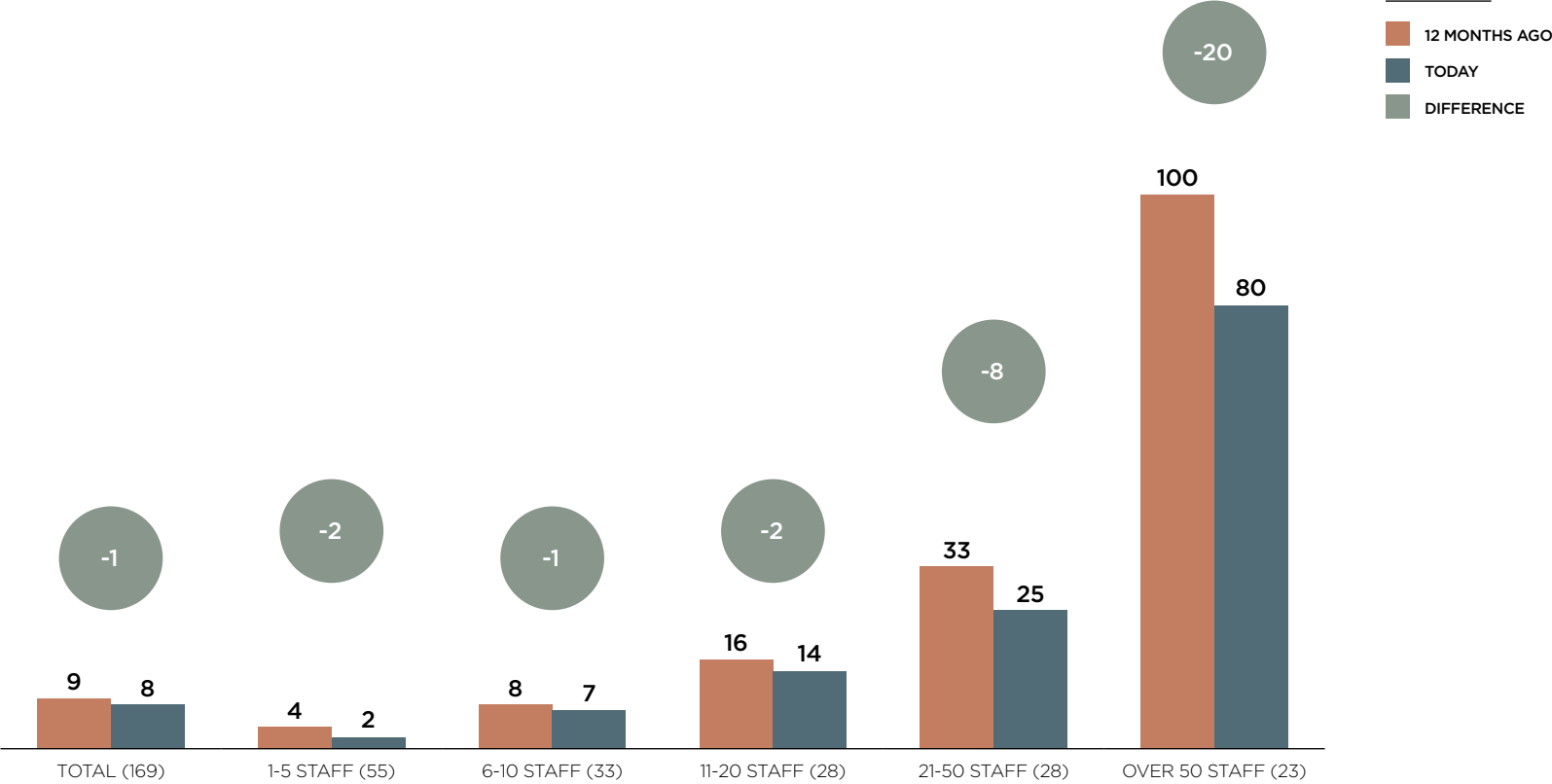
EMPLOYEE NUMBERS HAVE INCREASED
EMPLOYEE NUMBERS HAVE DECREASED

Q: "HAS THE NUMBER OF PEOPLE IN YOUR PRACTICE CHANGED COMPARED TO THIS TIME 12 MONTHS AGO?"

EMPLOYEE NUMBERS: MEDIAN NUMBER OF STAFF BY SIZE OF BUSINESS

Among those who have increased or decreased staff, the net median change in staff numbers is a loss of one person. The larger the business, the more staff they are likely to have lost in the last 12 months.

Smaller firms are most effected, halving staff from four to two employees over the last year.



Q: "HOW MANY STAFF DID YOU HAVE THIS TIME 12 MONTHS AGO, AND HOW MANY DO YOU HAVE TODAY?"

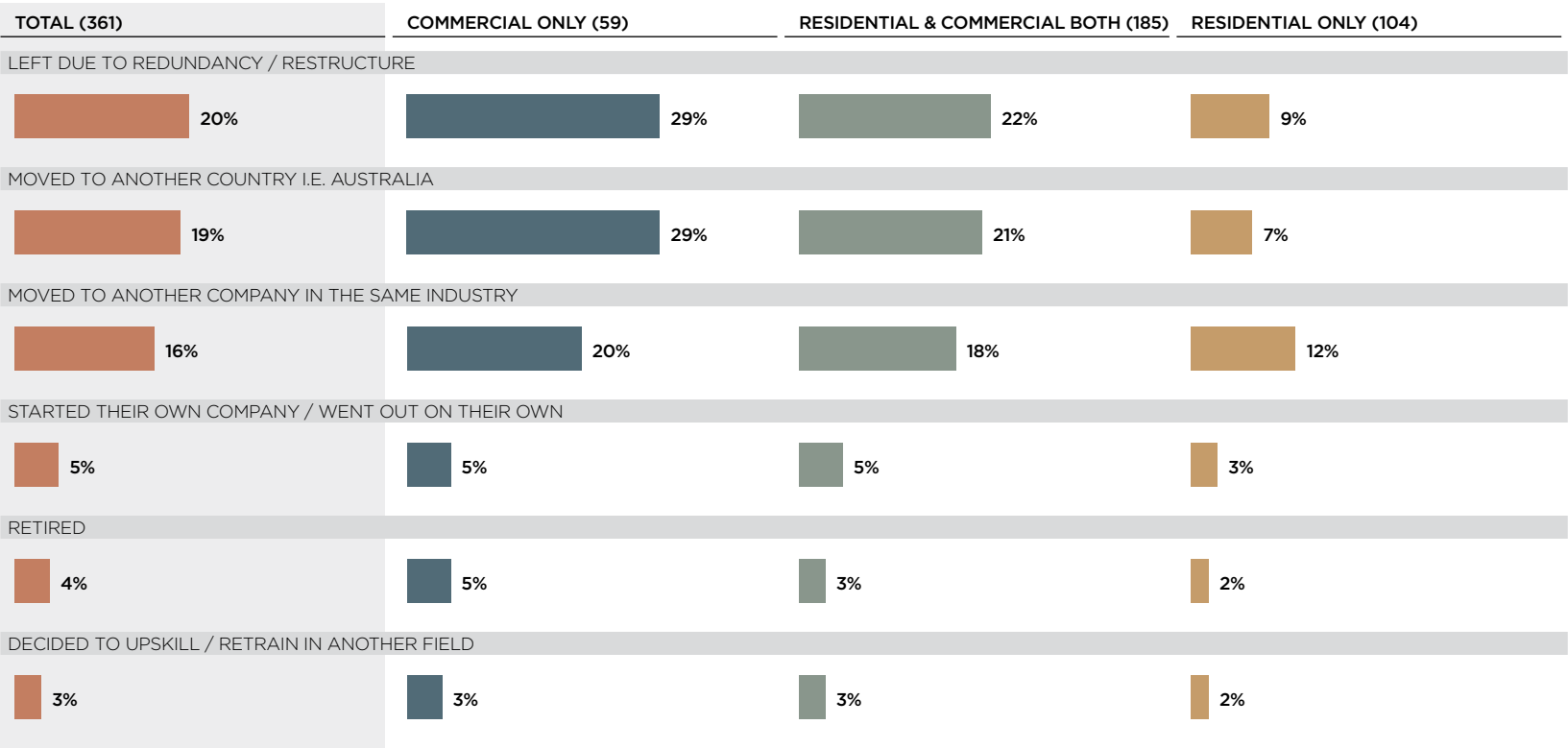
LOSING STAFF

The brain drain is impacting the construction design industry: 19% of those surveyed say their practice has lost staff to overseas.

While losing staff may be necessary given the lower current and forward work, the shift overseas is a contributing factor in why 58% of those looking to hire think it will be difficult to find good staff.

The reason for losing staff is very different in residential vs commercial focused practices. Commercial saw more redundancies and staff moving to another country, whereas residential saw more moving to another company in the same industry.

BASE: Total sample



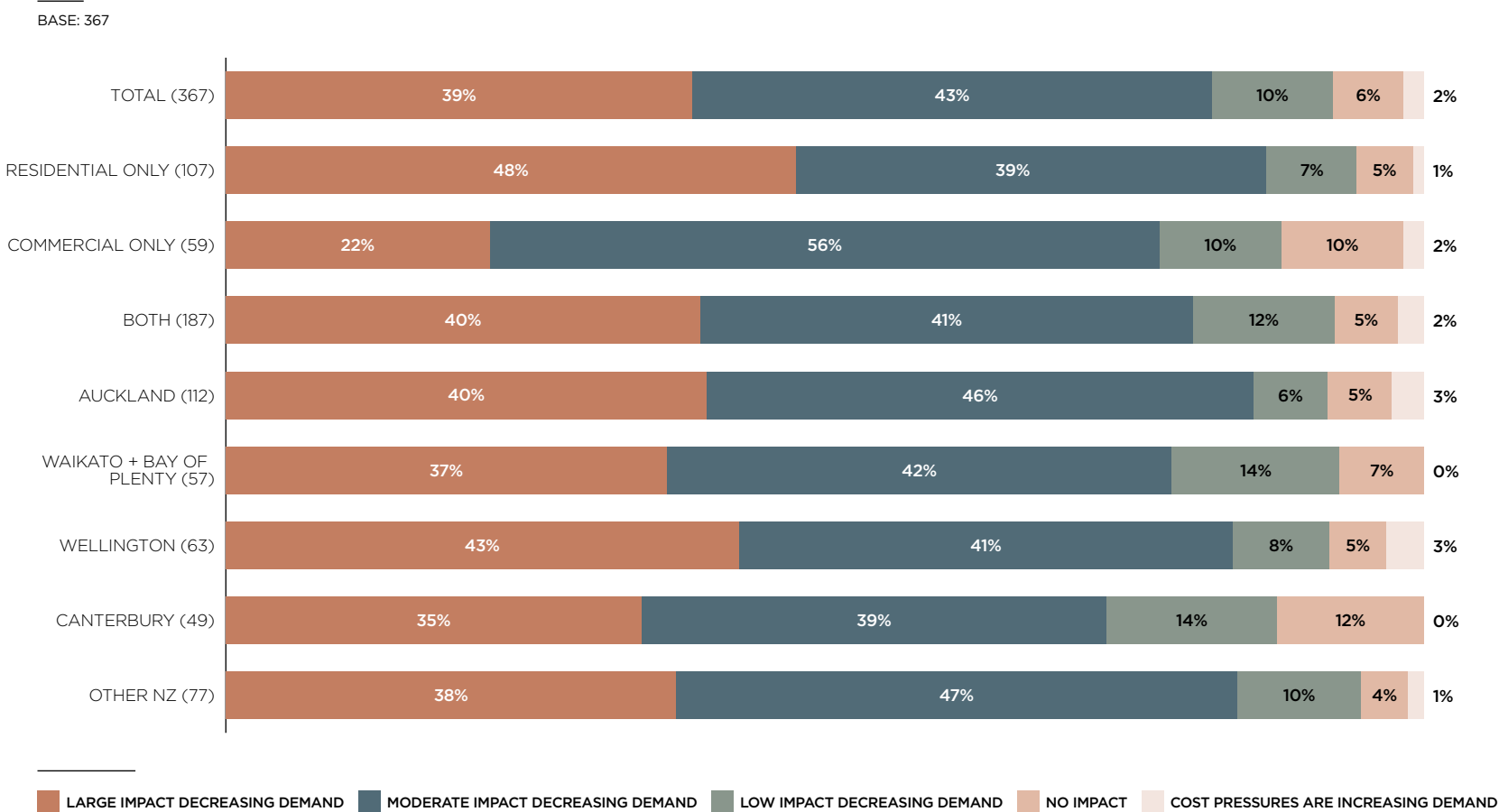
Q: "WHAT WERE THE REASONS FOR THEIR DEPARTURE?"

COST PRESSURES

A new question was added in 2025 focused specifically on the impact of cost pressures on design demand.

Four in ten designers say that cost pressures are having a large impact on design demand, while a further 43% say pressures are having a moderate impact.

Those focused on residential work, in smaller businesses, and based in Wellington are more likely to say that cost pressures are having a large impact decreasing demand.



Q: "TO WHAT EXTENT WOULD YOU SAY COST PRESSURES ARE IMPACTING THE DEMAND FOR WORK?"

INDUSTRY SITUATION

Sentiment for the year ahead is net-positive, with many comments suggesting conditions are unlikely to fall much further and should gradually improve.

However, specifiers expect only modest gains over the next 12 months, and a minority still foresee a slight further decline.

Optimism is strongest in the Waikato/ Bay of Plenty and in North Island regions outside the main centres.

Commercial-focused practices are also more upbeat than those concentrated on residential work.

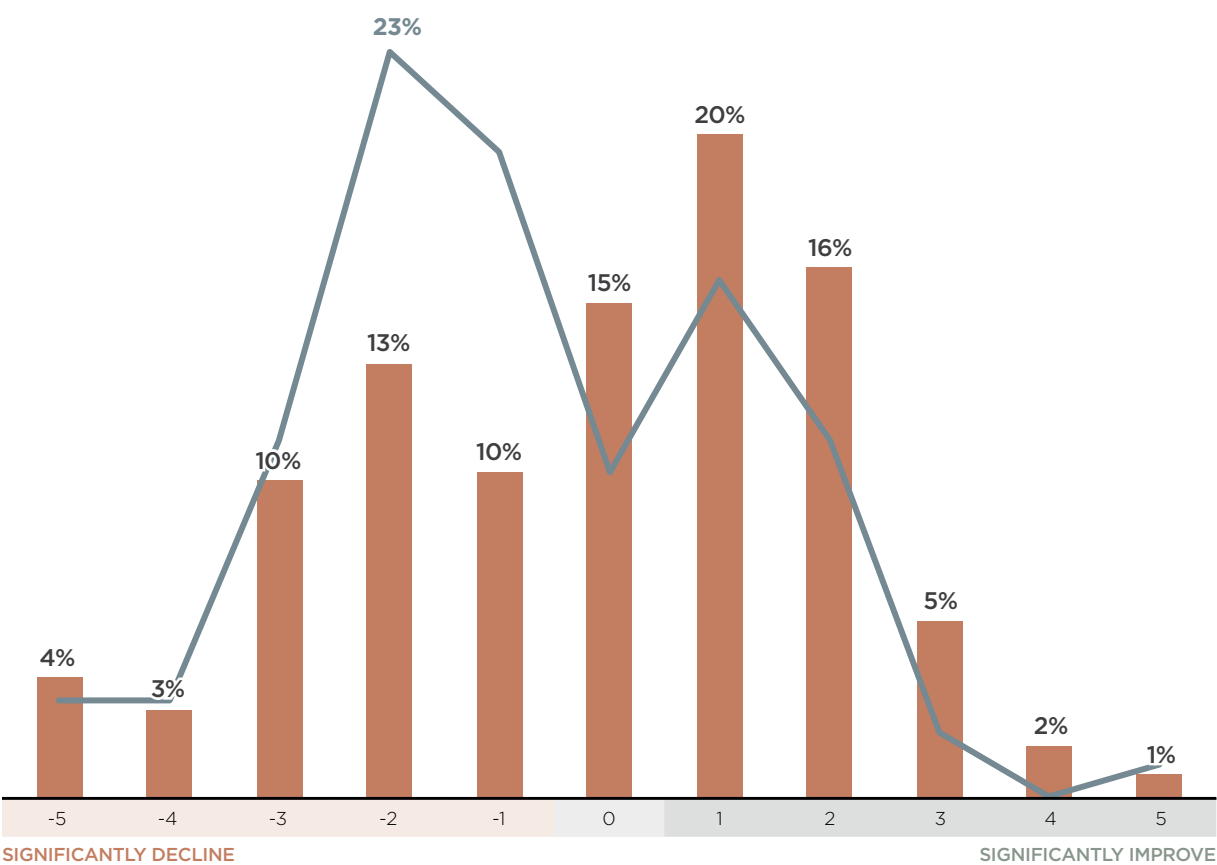
BASE: 366

2025
Net +5

2024
Net -30

(CALCULATED SCORE:
% HIGHER COMBINED
MINUS % LOWER COMBINED)

2025 2024

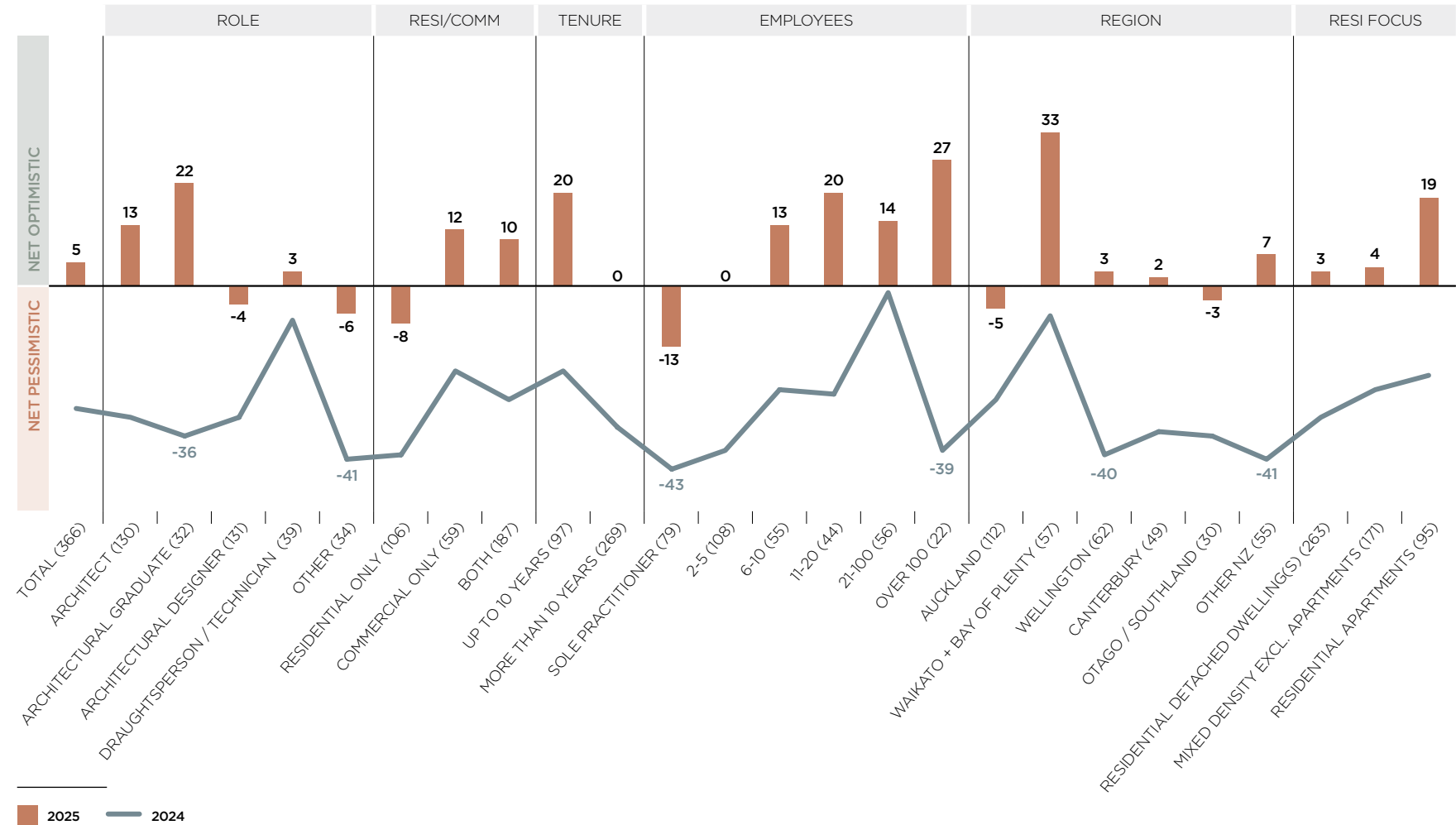


Q: "HOW DO YOU ANTICIPATE THE OVERALL CONDITION OF NEW ZEALAND'S CONSTRUCTION INDUSTRY WILL CHANGE IN THE NEXT 12 MONTHS?"

NET SENTIMENT: INDUSTRY SITUATION

Net industry situation is based on the net proportion selecting positive minus the net proportion selecting negative. It enables us to track sentiment over time.

Sole traders, those focused on only residential work, and specifiers based in Auckland have a net negative sentiment towards the industry situation. Architects based in the Waikato / Bay of Plenty are very optimistic about the next 12 months, as are the largest category of businesses, and those focused on commercial work.



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

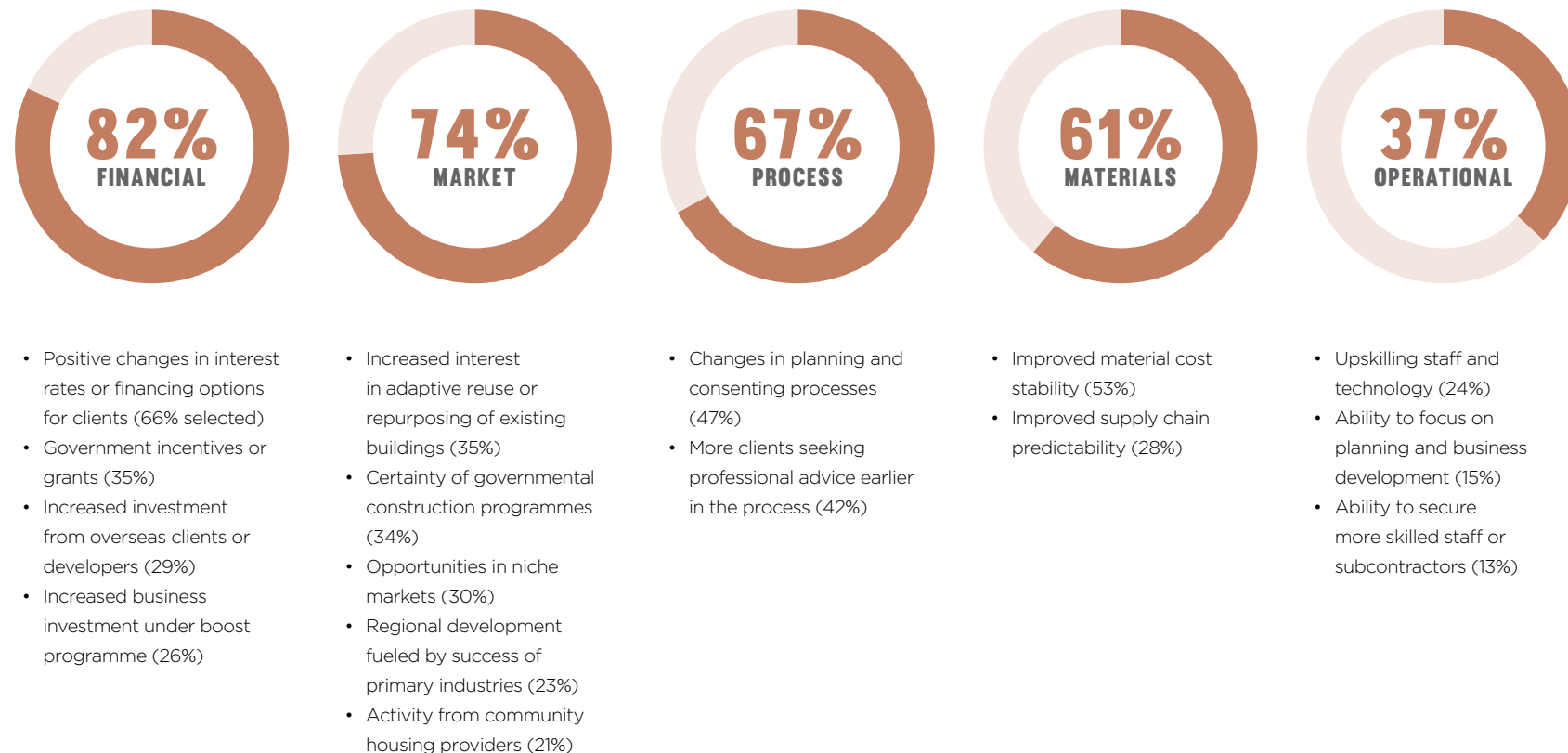
THE POSITIVE NEWS

While conditions remain challenging, respondents do see green shoots. This year, we asked which factors could boost their business over the next two years.

Shifts in interest rates emerged as the single most promising development. Taken together, financial factors form the biggest source of optimism: 82% of specifiers selected at least one financial driver they believe will have a positive impact.

Market-related factors are also viewed favourably, with around three-quarters choosing at least one. The specific market drivers vary by sub-group and will be explored on the next page.

BASE: 359

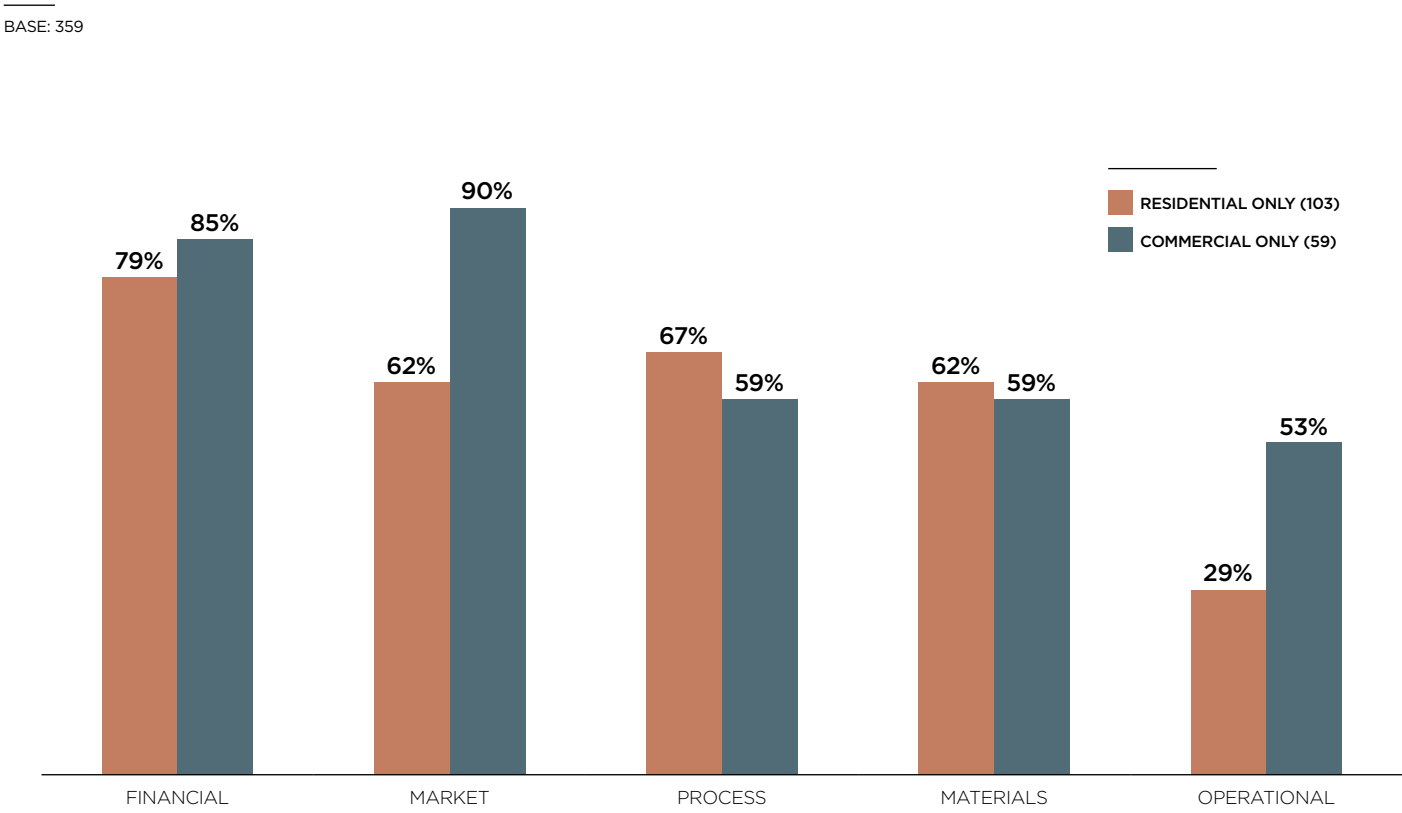


Q: "WHICH (IF ANY) OF THE FOLLOWING ARE LIKELY TO HAVE A POSITIVE IMPACT ON YOUR OWN BUSINESS SITUATION IN THE NEXT 24 MONTHS?"

THE POSITIVE NEWS

Specifiers focused on commercial work see more upside in market and operational drivers than their residential counterparts. More than half (53%) point to government incentives or grants — covering energy efficiency, social housing, and infrastructure — as a future positive, and 46% anticipate gains from the Government's new investment-boost programme.

Residential practices are less buoyed by public-sector activity. 21% view certainty around government construction programmes as a positive (versus 51% of commercial-only firms), and just 12% cite community-housing provider activity, compared with 24% of commercial practices.



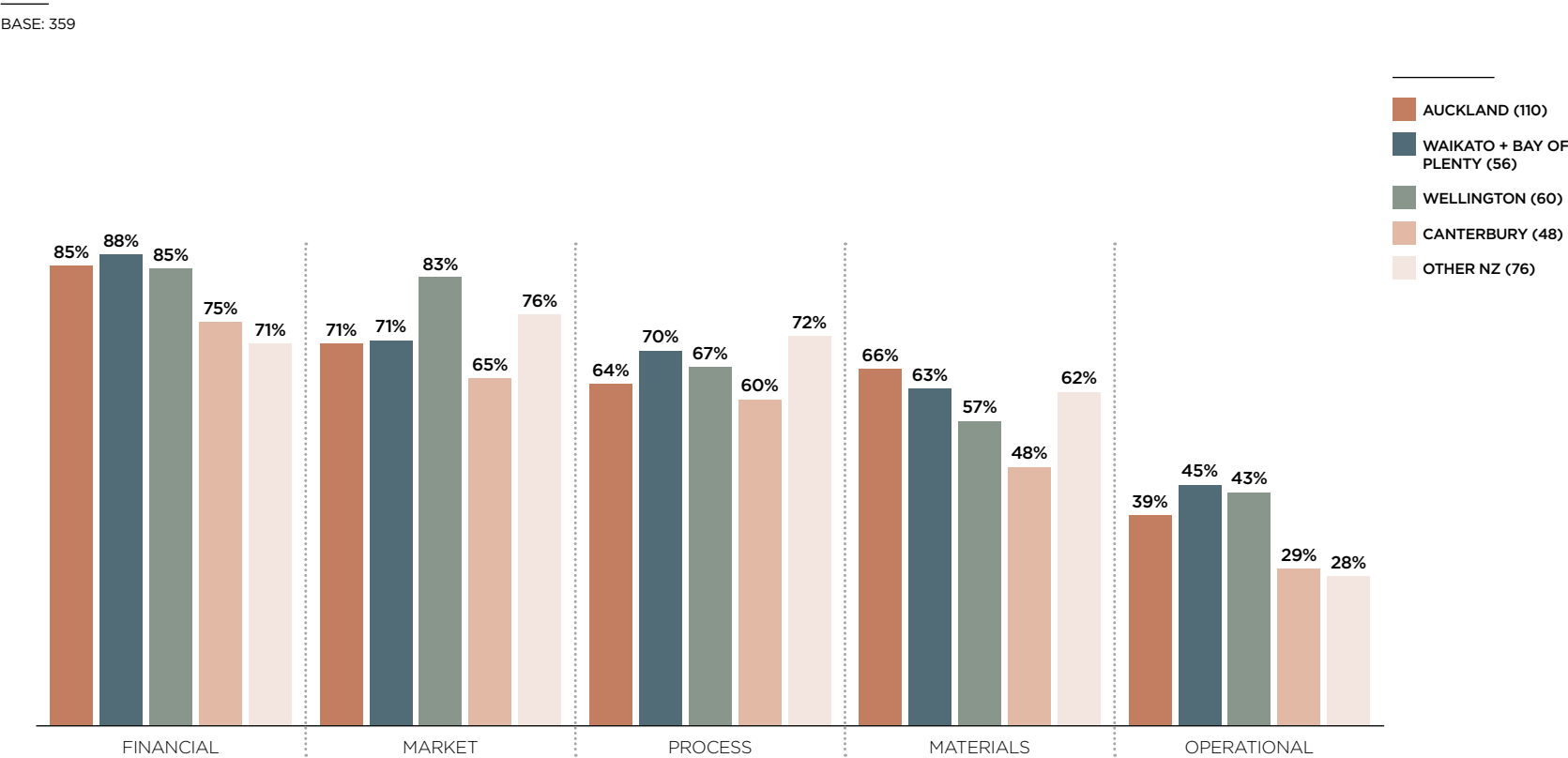
Q: “WHICH (IF ANY) OF THE FOLLOWING ARE LIKELY TO HAVE A POSITIVE IMPACT ON YOUR OWN BUSINESS SITUATION IN THE NEXT 24 MONTHS?”

THE POSITIVE NEWS

Wellington has been identified as an area where practices are struggling more than the New Zealand average. For practices in Wellington, market factors provide something of a light ahead.

In particular for Wellington, increased interest in adaptive reuse or repurposing of existing buildings is selected by 52% compared to 35% on average. In addition, the certainty of governmental construction programmes might help to recover from the downturn — 48% choose this, compared to 34% on average.

Outside of the main centres, market, process and material factors are more likely to be seen as a positive for the future. However, those in regional NZ selected only 4.9 factors on average, compared to 5.8 in Wellington or 5.3 overall. This suggests that while there are reasons to be positive in regional NZ, those reasons are less layered than in main centres.



Q: "WHICH (IF ANY) OF THE FOLLOWING ARE LIKELY TO HAVE A POSITIVE IMPACT ON YOUR OWN BUSINESS SITUATION IN THE NEXT 24 MONTHS?"