European Architectural Barometer Q1 2026 – report impression

Decision Making Unit (DMU)

April 2026

a product by USP Marketing Consultancy

Index

USP

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 2026:
Q1: Decision Making Unit (DMU)

THE TIMELINE

Report Q1	Report Q2	Report Q3	Report Q4
May	August	November	February

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
Project manager

jurkovic@usp-mc.nl

Dirk Hoogenboom
Research Consultant

+31 652098924
hoogenboom@usp-mc.nl

USP

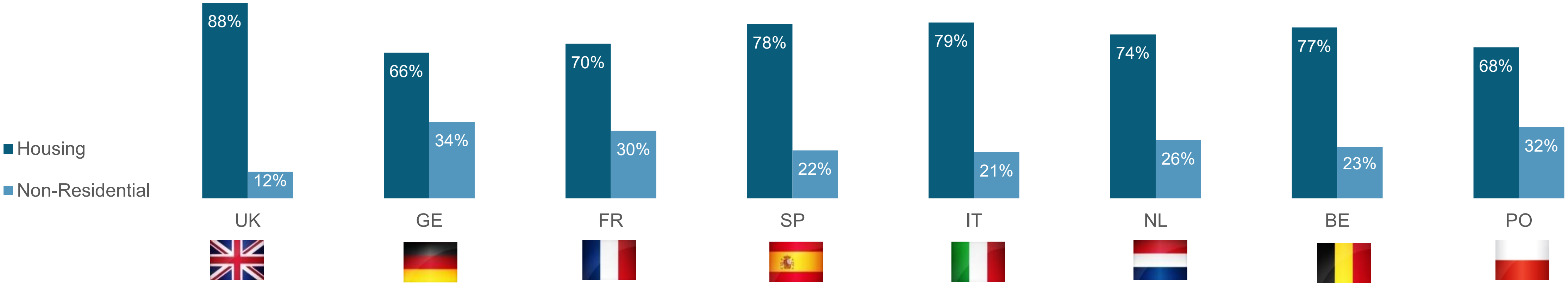
Background of the architects

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	**6,9**	**7,3**	**4,9**	**5,2**	**4,4**	**8,9**	**6,9**	**6,9**
2 – 4 FTE	54%	50%	62%	58%	74%	34%	49%	52%
5 – 9 FTE	28%	31%	23%	30%	17%	31%	32%	27%
10 – 19 FTE	11%	9%	14%	12%	6%	13%	6%	16%
20 – 39 FTE	6%	9%	1%	1%	2%	9%	6%	4%
> 40 FTE	2%	1%	0%	0%	0%	3%	1%	1%

Segment mostly active



Index

Key insights – economic developments

1 **Insight 1**

2 **Insight 2**

3 **Insight 3**

Key insights - DMU

1

Insight 1

2

Insight 2

3

Insight 3

Key insights - DMU

4 Insight 4

5 Insight 5

6 Insight 6

Strategic implication

Described here...

Index

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?

16. To what extent do you expect rising energy prices and geopolitical instability to influence construction projects in the next 12 months?
17. What are these negative effects on the construction sector in your country?

Geopolitical instability ...

Views on current geopolitical situation

To what extent do you expect rising energy prices and geopolitical instability to influence construction projects in the next 12 months?
*- Countries are ranked by total expected decline in construction activity (**slight** + **strong decrease**).*

Total N=925; Belgium N=100; France N=125; Germany N=125; Italy N=125; Netherlands N=100; Poland N=100; Spain N=125; UK N=125.

Geopolitical instability ...

Negative effects on the construction sector caused by geopolitical instability
What are these negative effects on the construction sector in your country?

	Total								
Rising material costs	X%	x%	x%	x%	x%	x%	x%	x%	x%

Total N=663; Belgium N=85; France N=100; Germany N=91; Italy N=89; Netherlands N=71; Poland N=49; Spain N=83; UK N=95.

Construction market forecast 2026

Bullet point 1

Bullet point 2

Bullet point 3

Bullet point 4

Construction market forecast 2027

Bullet point 1

Bullet point 2

Bullet point 3

Bullet point 4

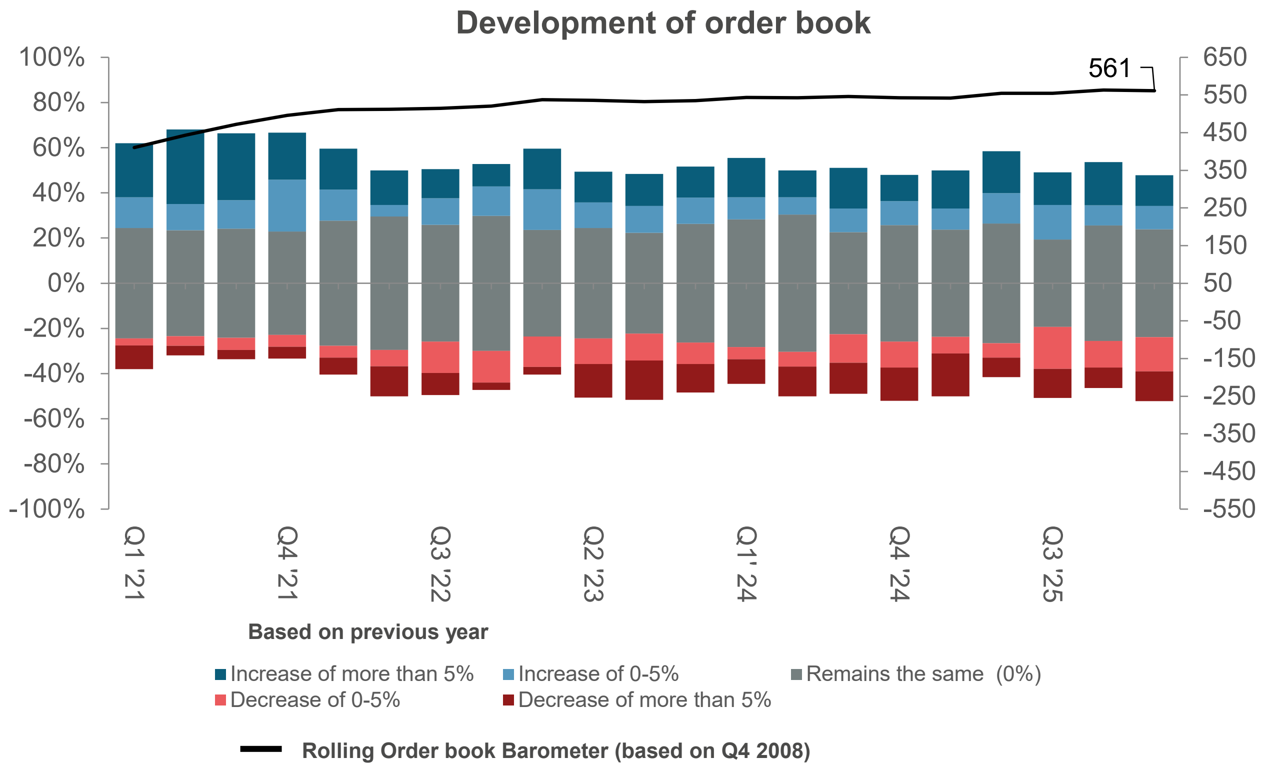
USP

Index

Belgian order books remain relatively stable

Belgian architects continue to report largely stable order book developments, with only limited fluctuations compared to previous quarters. The balance between increasing and decreasing order books remains relatively even.

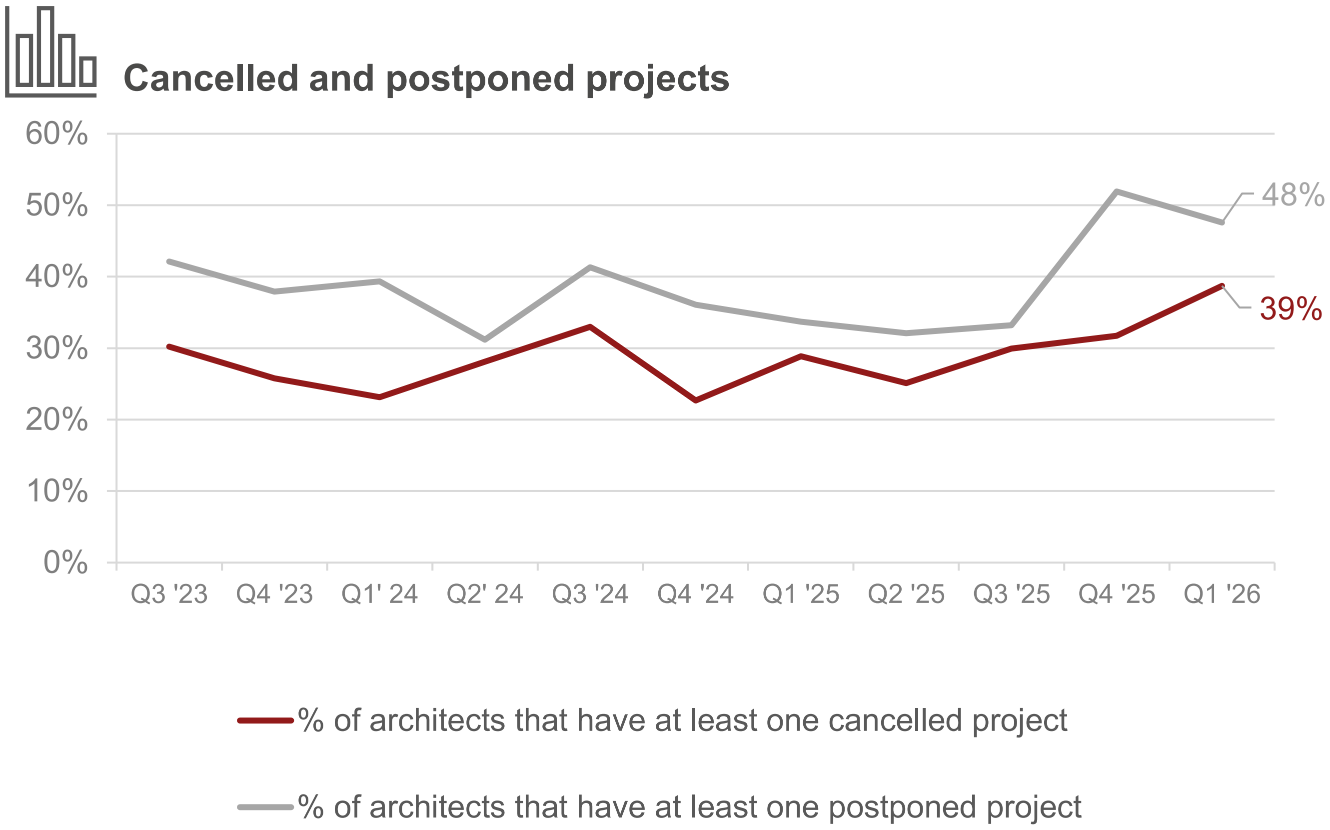
The share of architects expecting empty order books increased slightly but still remains below more pessimistic European markets.



Project pressure increases slightly in Belgium

The share of Belgian architects reporting cancelled and postponed projects increased in Q1 ’26. Especially cancellations rose compared to earlier quarters, indicating somewhat higher pressure on project continuity.

Nevertheless, postponed projects still occur more frequently than outright cancellations, suggesting that many projects are delayed rather than abandoned.

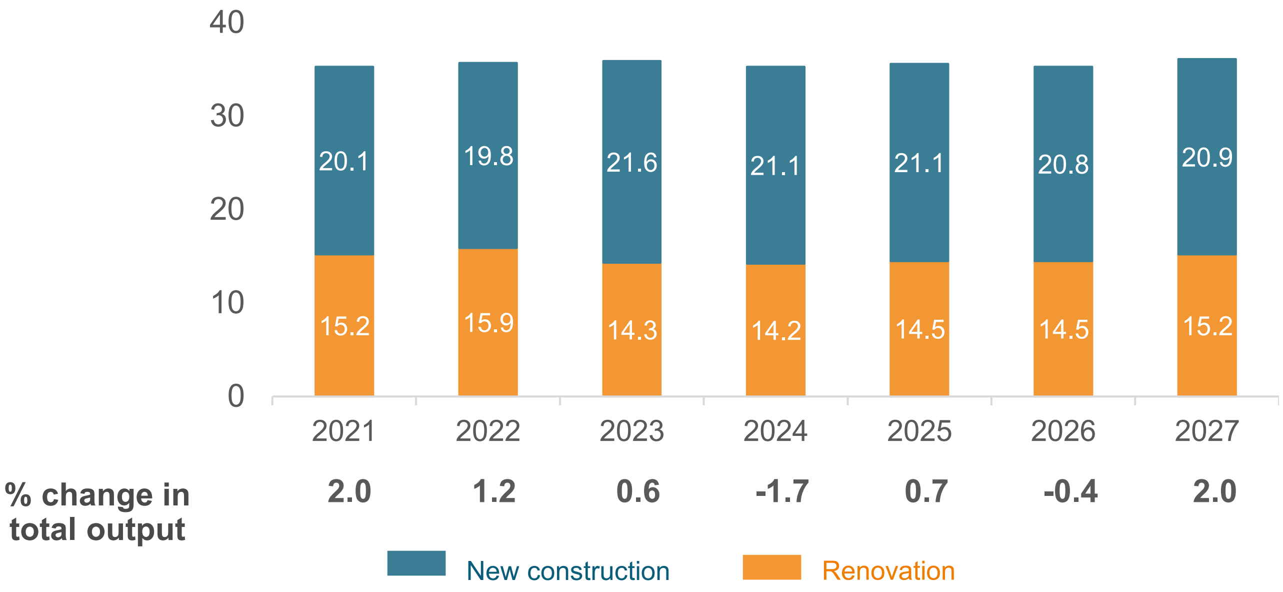


Belgian construction market expected to recover gradually

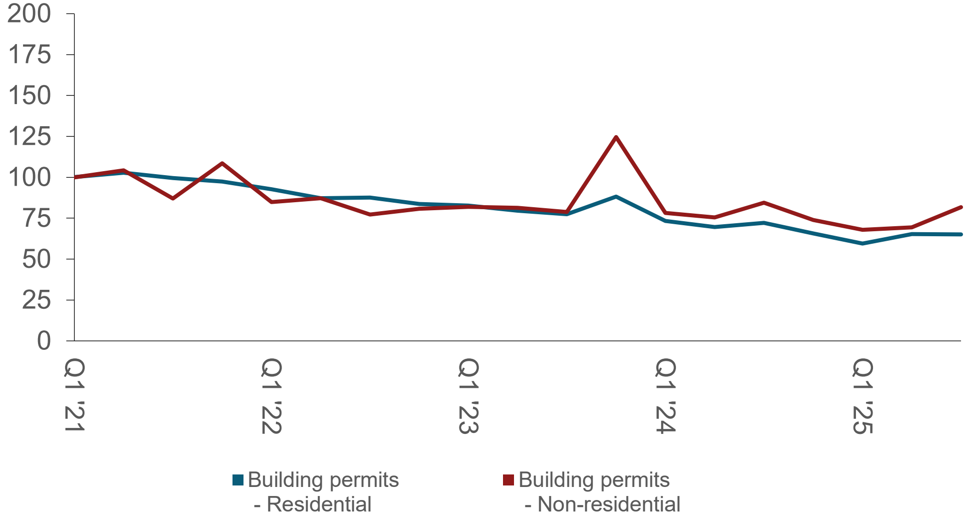
The Belgian construction market is expected to remain relatively flat in 2026 before returning to growth in 2027. Renovation activity remains stable, while non-residential construction shows only modest fluctuations.

Building permit developments remain weak overall, but market indicators suggest that the sector continues to stabilise gradually.

Forecast of building volumes in billion euros



Development building permits



Index 2021=100

Source: Eurostat

Index

Questionnaire – Theme questions

Decision-making unit

1. What do you think will happen to your role on the following aspects in the coming two years? (Managing budgets, Managing planning of process, Monitoring actual construction as designed, Specialist on laws and regulations, Aesthetical design, Design of the structure of the building, Technical specifications, Manufacturer/Brand selection)
2. Architects play an important role in the construction process. Which other parties do you consider to be important influencers of the building process?
3. I will read a number of statements about decision-making on products and brands in construction. Please indicate to what extent you agree or disagree. You can answer on a scale of 1 to 5. Where 1 =Completely disagree, 2= Disagree , 3 = Neutral, 4 = Agree and 5 = Completely agree.

- The architect’s role in the product and brand selection process is becoming less important.
- Due to their increasing size, construction firms are gaining influence in product and brand selection.
- The architect can bring more added value in renovation projects than in new build projects.
- I like to work with specialized offices when it comes to quite technical topics like HVAC or Smart Home.
- The European building regulations will lead to a more holistic approach in the design of the buildings (integrated buildings).
- Due to price increases a cheaper alternative is often proposed and chosen by contractors and clients to stay within budget.
- Contractors are increasingly involved earlier in the design phase.
- Manufacturers increasingly influence product choices through technical support and expertise.

4. For each project many choices have to be made. For some of these topics we are interested to what extent you are involved in the decision process or what your influence is. Can you indicate what your role is on the following parts of the process: Are you 1 = End decision maker; 2 = Co-decision maker; or 3 = Not involved. **Aesthetical design, Structural design, Building material/ product specification, Brand choice, Technical specifications.**

5. Which other stakeholders are mainly involved in the building material / product choice?

6. If we talk about brand choice for building material/ product, which other stakeholders are mainly involved ?

7. How often are the materials or brands specified by architects changed or replaced during construction?

8. When materials or brands specified by the architect are changed during construction, who usually initiates these changes?

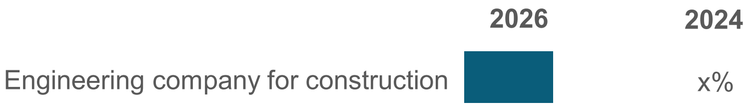
9. What are the main reasons why materials or brands specified by the architect are changed?

Insight
Explanation

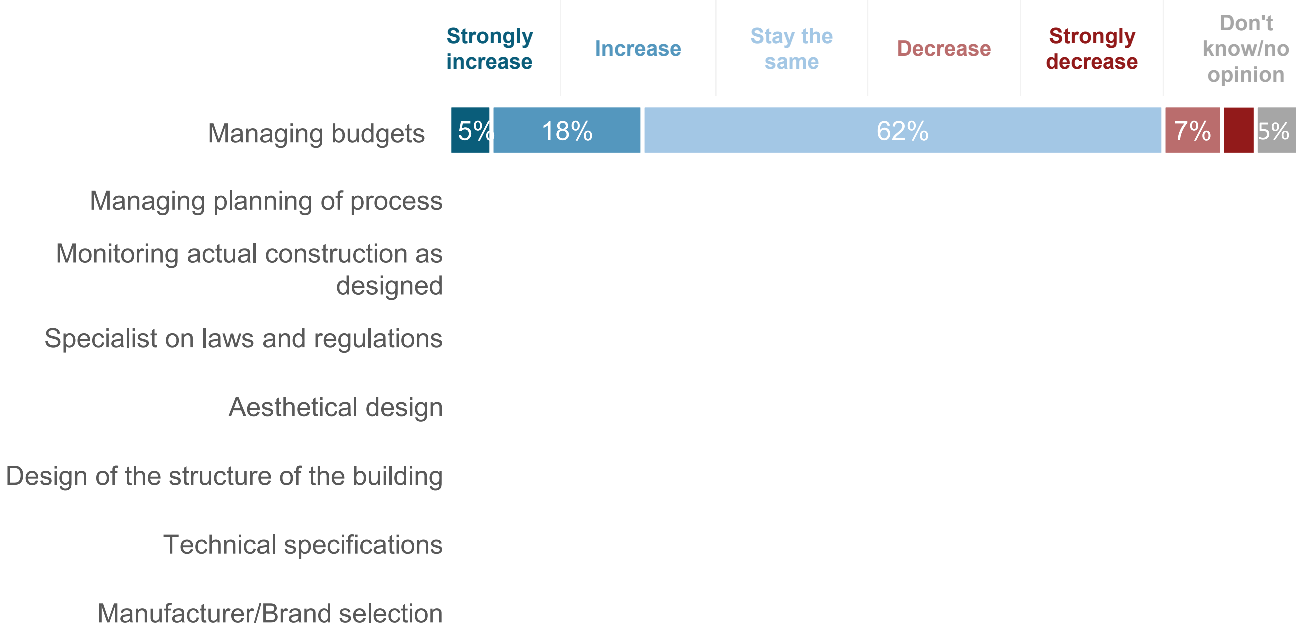
Insight
Explanation

Insight
Explanation

Key influencers in the building process (besides architects) – top 5



Expected evolution of architects' roles over the next two years

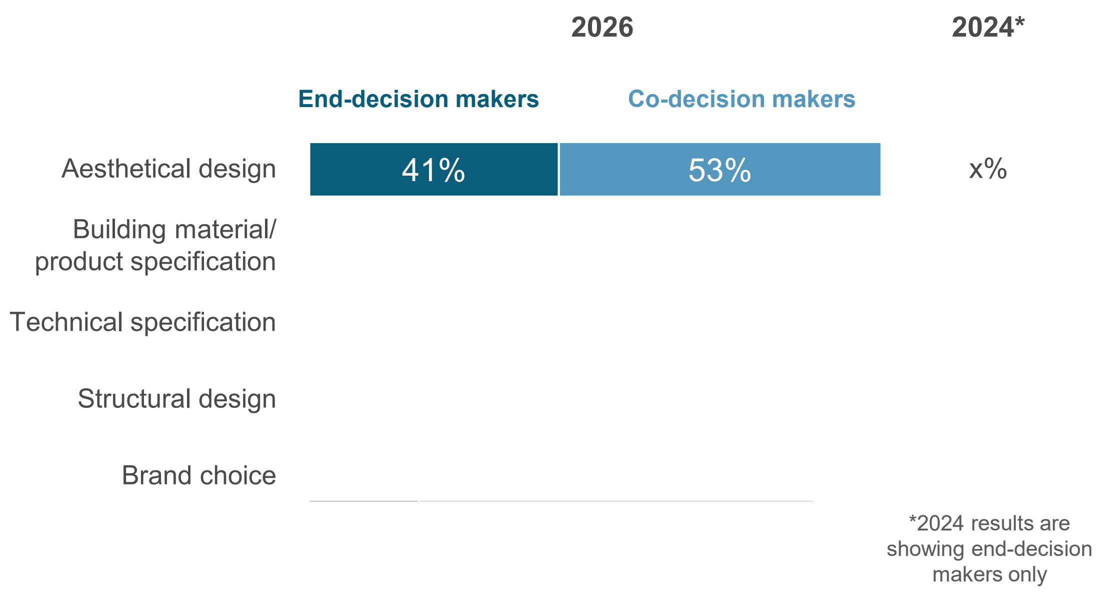


Insight
Explanation

Insight
Explanation

Insight
Explanation

Architects' role in decision-making across key project stages



Insight
Explanation

Insight
Explanation

Insight
Explanation

Key stakeholders involved in material and brand selection

Building material choice – top 5

Brand choice – top 5

Insight
Explanation

Insight
Explanation

Insight
Explanation

Shifting roles and influence in the building decision-making process

	2026	2024
Due to price increases a cheaper alternative is often proposed and chosen by contractors and clients to stay within budget.	80%	x%
I like to work with specialized offices when it comes to quite technical topics like HVAC or Smart Home.		
Manufacturers increasingly influence product choices through technical support and expertise.		
Due to their increase size, construction firms are gaining influence in product and brand selection		
The architect can bring more added value in renovation projects than in new build projects		
Contractors are increasingly involved earlier in the design phase		
The architect’s role in the product and brand selection process is becoming less important.		
The European building regulations will lead to a more holistic approach in the design of the buildings (integrated buildings).		

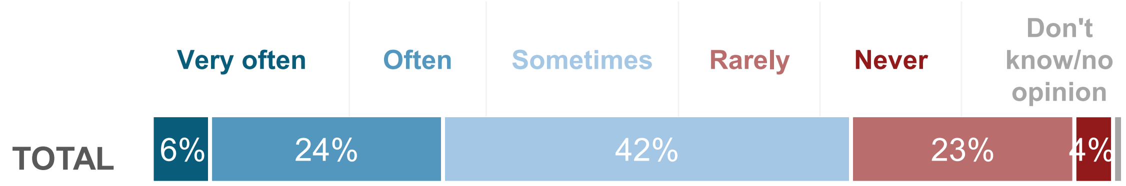
Completely agree + Agree

Insight
Explanation

Insight
Explanation

Insight
Explanation

Frequency of changes to architect-specified materials and brands during construction



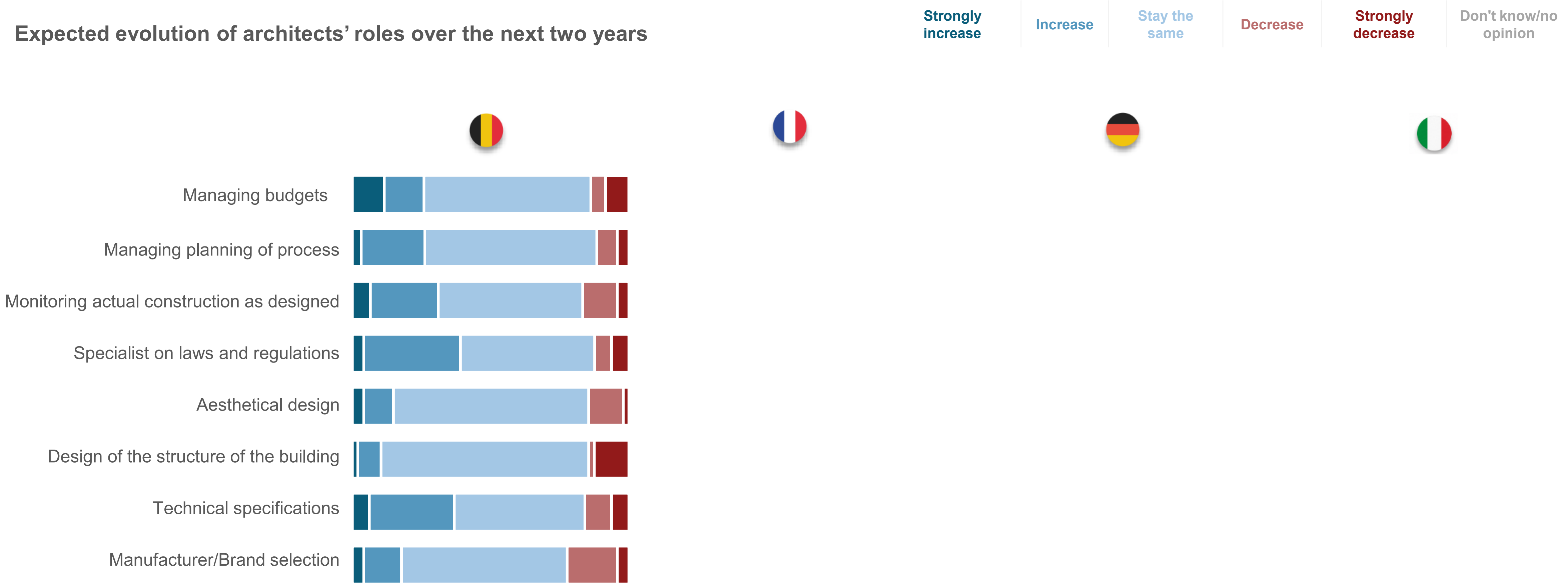
Who initiates changes to architect-specified materials and brands during construction – top 5

Reasons why materials or brands specified by the architect are changed – top 5

Index

Explanation

Expected evolution of architects' roles over the next two years



Total N=464; Belgium N=50; France N=62; Germany N=63; Italy N=63; Netherlands N=50; Poland N=50; Spain N=63; UK N=63;.

Explanation

Expected evolution of architects' roles over the next two years

Strongly increase | Increase | Stay the same | Decrease | Strongly decrease | Don't know/no opinion

Managing budgets

Managing planning of process

Monitoring actual construction as designed

Specialist on laws and regulations

Aesthetical design

Design of the structure of the building

Technical specifications

Manufacturer/Brand selection

Total N=464; Belgium N=50; France N=62; Germany N=63; Italy N=63; Netherlands N=50; Poland N=50; Spain N=63; UK N=63;.

Explanation

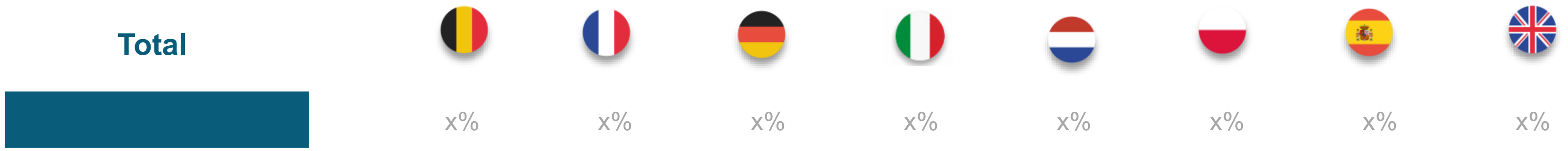
Key influencers in the building process (besides architects) – top 10

	Total								
Engineering company for construction	X%	x%	x%	x%	x%	x%	x%	x%	x%
Building owner/ end user									
Main contractor									
Engineering company for installations									
Municipality/government									
Quantity surveyor									
Home Builder/Home developer									
Client investors & Financial stakeholders									
Electrical installation company									
Principal									

Total N=461; Belgium N=50; France N=63; Germany N=62; Italy N=62; Netherlands N=50; Poland N=50; Spain N=62; UK N=62;

Explanation

Shifting roles and influence in the building decision-making process



Due to price increases a cheaper alternative is often proposed and chosen by contractors and clients to stay within budget.

I like to work with specialized offices when it comes to quite technical topics like HVAC or Smart Home.

Manufacturers increasingly influence product choices through technical support and expertise.

Due to their increase size, construction firms are gaining influence in product and brand selection

The architect can bring more added value in renovation projects than in new build projects

Contractors are increasingly involved earlier in the design phase

The architect's role in the product and brand selection process is becoming less important.

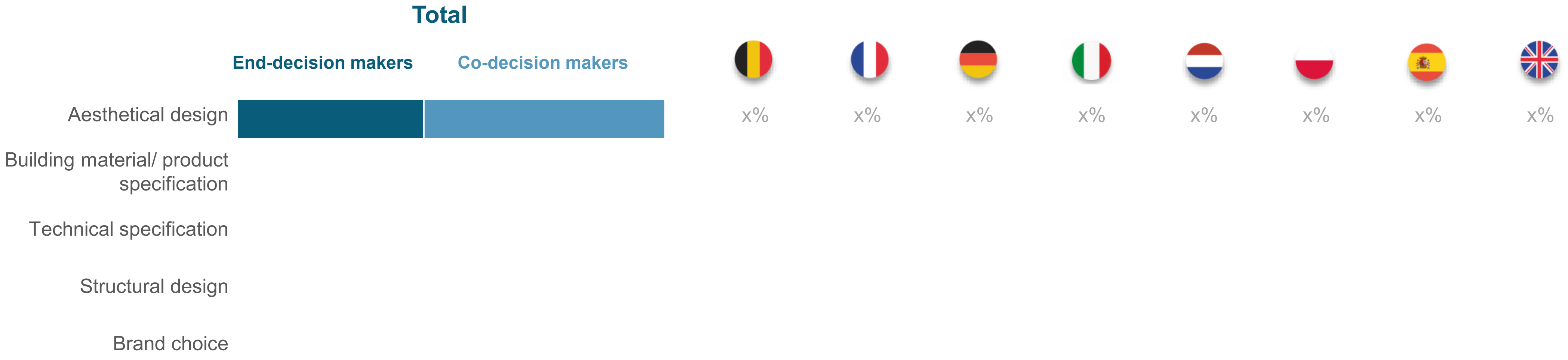
The European building regulations will lead to a more holistic approach in the design of the buildings (integrated buildings).

Completely agree + **Agree**

Total N=464; Belgium N=50; France N=62; Germany N=63; Italy N=63; Netherlands N=50; Poland N=50; Spain N=63; UK N=63;

Explanation

Architects' role in decision-making across key project stages



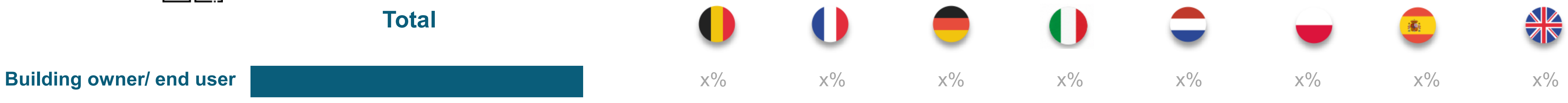
Country results are showing end-decision makers only.

Total N=925; Belgium N=100; France N=125; Germany N=125; Italy N=126; Netherlands N=100; Poland N=100; Spain N=125; UK N=125;

Explanation

Stakeholders involved in material and brand selection (other than architects)

Building material choice

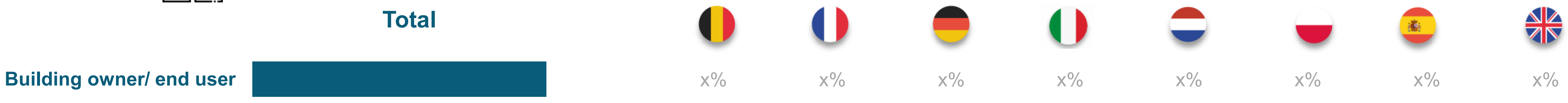


Total N=925; Belgium N=100; France N=125; Germany N=125; Italy N=125; Netherlands N=100; Poland N=100; Spain N=125; UK N=125;.

Explanation

Stakeholders involved in material and brand selection (other than architects)

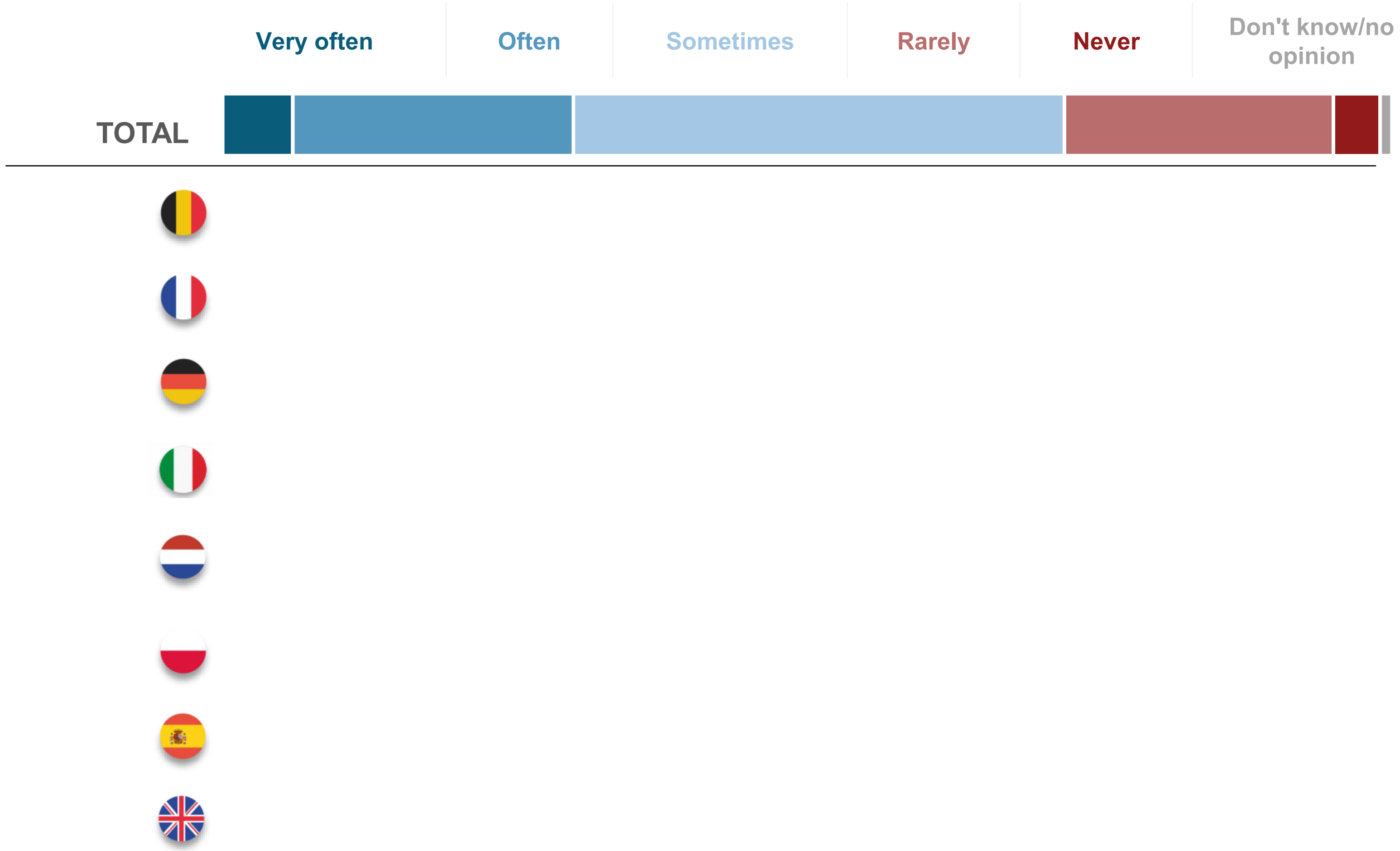
Brand choice



Total N=925; Belgium N=100; France N=125; Germany N=125; Italy N=125; Netherlands N=100; Poland N=100; Spain N=125; UK N=125;.

Explanation

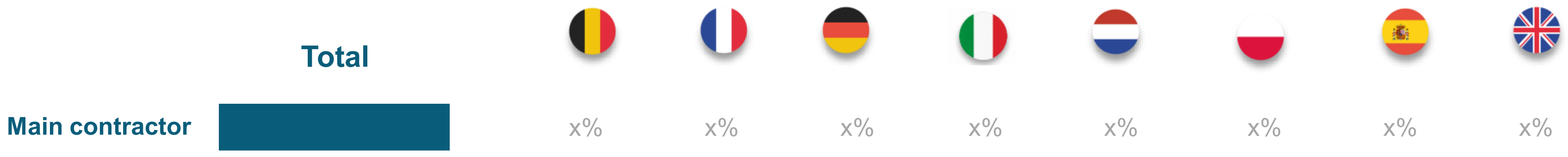
Frequency of changes to architect-specified materials and brands during construction



Total N=925; Belgium N=100; France N=125; Germany N=125 Italy N=125; Netherlands N=100; Poland N=100; Spain N=125; UK N=125;.

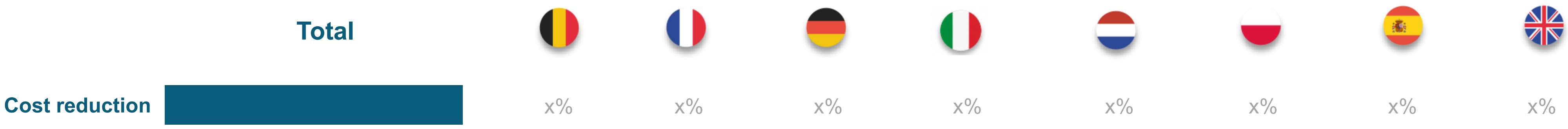
Explanation

Who initiates changes to architect-specified materials and brands during construction – top 10



Total N=884; Belgium N=96; France N=117; Germany N=115; Italy N=115; Netherlands N=97; Poland N=99; Spain N=121; UK N=124

Explanation



Total N=884; Belgium N=96; France N=117; Germany N=115; Italy N=115; Netherlands N=97; Poland N=99; Spain N=121; UK N=124

Index

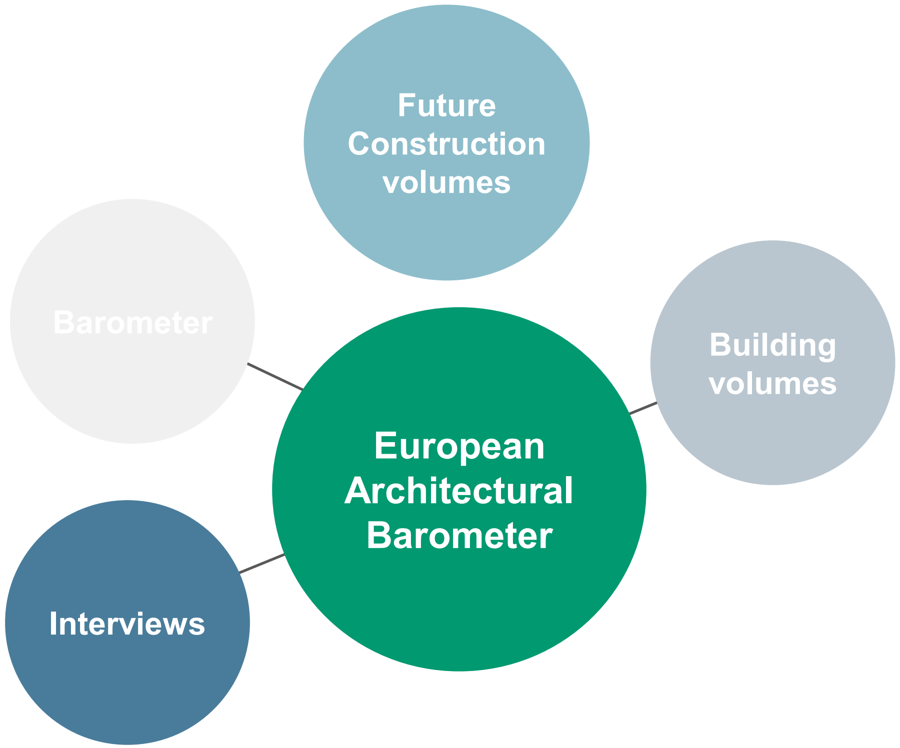
About European Architectural Barometer

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.



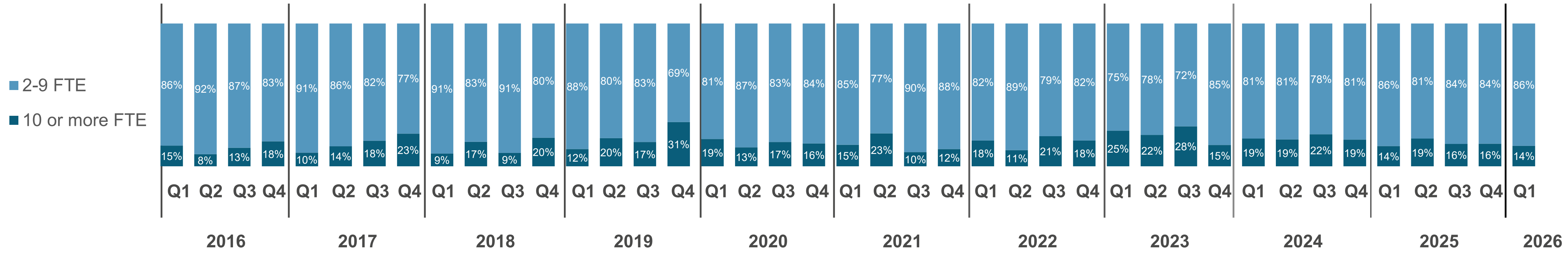
Future construction volumes

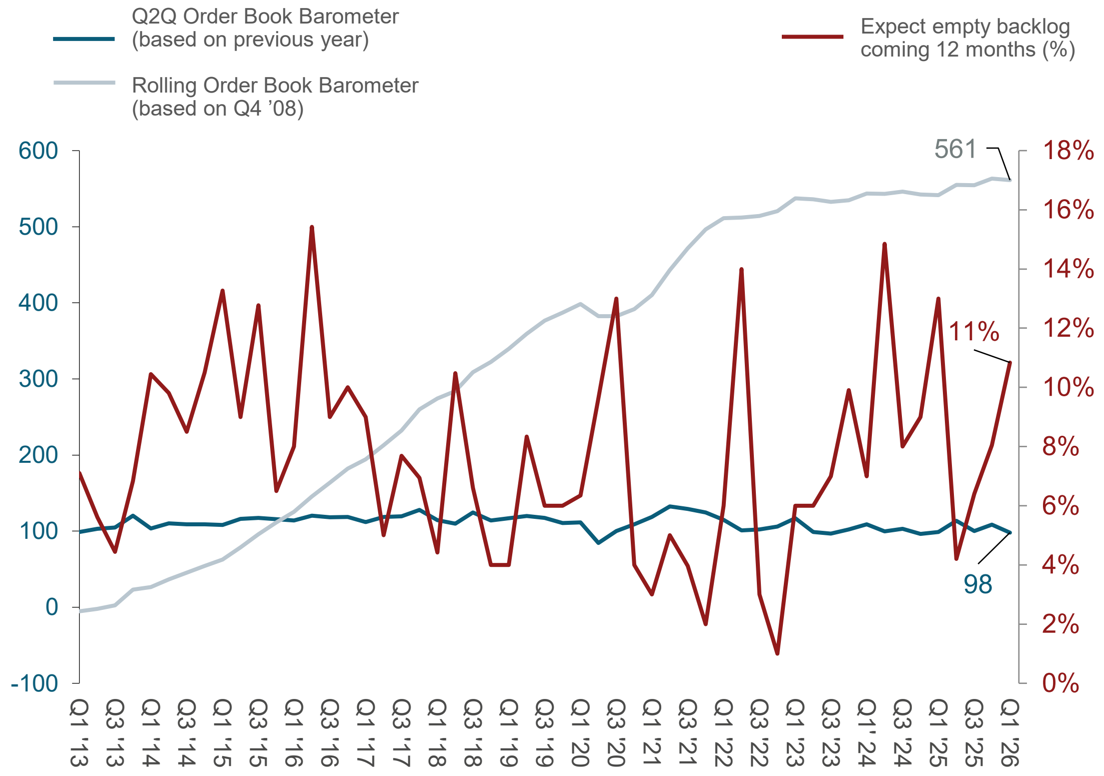
For decision makers charged with considerations of company resources, staffing and marketing strategy, a clear insight into future construction volumes is essential. However, economic indicators seldom provide an adequate picture of these volumes.

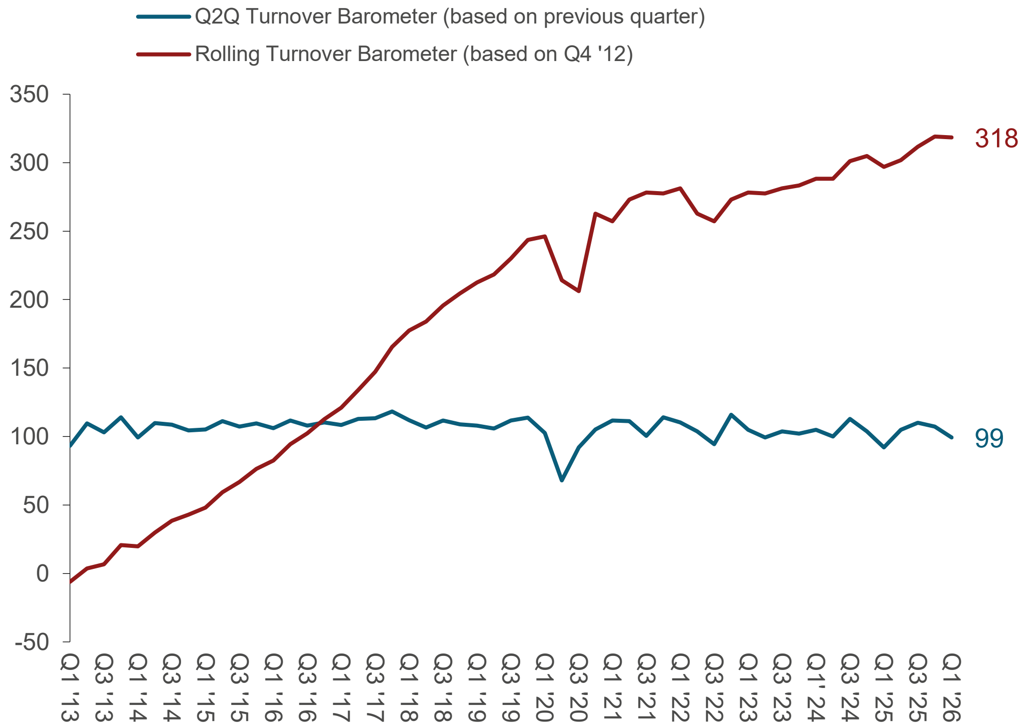
Building volumes

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.

Short-term outlook among Belgian architects







USP

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%)																			11%	6%	20%			
Slightly increased (0-5%)																			7%	0%	20%			
Stayed the same (0%)																			69%	61%	36%			
Slightly decreased (0-5%)																			4%	0%	7%			
Strongly decreased (>5%)																			9%	33%	17%			
Barometer turnover																			**103**	**72**	**110**			

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%)																			13%	8%	20%			
Slightly increased (0-5%)																			10%	8%	4%			
Stayed the same (0%)																			54%	47%	27%			
Slightly decreased (0-5%)																			9%	26%	26%			
Strongly decreased (>5%)																			13%	10%	23%			
Barometer order book																			**101**	**89**	**85**			

Expectation empty order book in the next 12 months

Expectation empty order book in the next 12 months

% 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
Yes																			11%	16%	12%			
No																			86%	84%	78%			
Do not know																			3%	0%	10%			

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)	2310	1759	2080	1400	957	743	1078	1781
Net sample (all approached respondents)	1076	408	422	658	430	455	383	567
Completed interviews	125	125	125	125	125	100	100	100
Response percentage (interviews/ net sample)	12%	31%	30%	19%	29%	22%	26%	18%

USP

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
		+ (-25)	+ (0)	+ (-15)	+ etc.							
Rolling Barometer Values	-29	-54	-54	-69	-69	-59	-65	-71	-60	-59	-65	**-66**

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.

USP

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?

16. To what extent do you expect rising energy prices and geopolitical instability to influence construction projects in the next 12 months?
17. What are these negative effects on the construction sector in your country?

Questionnaire – Theme questions

Decision-making unit

1. What do you think will happen to your role on the following aspects in the coming two years? (Managing budgets, Managing planning of process, Monitoring actual construction as designed, Specialist on laws and regulations, Aesthetical design, Design of the structure of the building, Technical specifications, Manufacturer/Brand selection)
2. Architects play an important role in the construction process. Which other parties do you consider to be important influencers of the building process?
3. I will read a number of statements about decision-making on products and brands in construction. Please indicate to what extent you agree or disagree. You can answer on a scale of 1 to 5. Where 1 =Completely disagree, 2= Disagree , 3 = Neutral, 4 = Agree and 5 = Completely agree.

- The architect’s role in the product and brand selection process is becoming less important.
- Due to their increasing size, construction firms are gaining influence in product and brand selection.
- The architect can bring more added value in renovation projects than in new build projects.
- I like to work with specialized offices when it comes to quite technical topics like HVAC or Smart Home.
- The European building regulations will lead to a more holistic approach in the design of the buildings (integrated buildings).
- Due to price increases a cheaper alternative is often proposed and chosen by contractors and clients to stay within budget.
- Contractors are increasingly involved earlier in the design phase.
- Manufacturers increasingly influence product choices through technical support and expertise.

4. For each project many choices have to be made. For some of these topics we are interested to what extent you are involved in the decision process or what your influence is. Can you indicate what your role is on the following parts of the process: Are you 1 = End decision maker; 2 = Co-decision maker; or 3 = Not involved. **Aesthetical design, Structural design, Building material/ product specification, Brand choice, Technical specifications.**

5. Which other stakeholders are mainly involved in the building material / product choice?

6. If we talk about brand choice for building material/ product, which other stakeholders are mainly involved ?

7. How often are the materials or brands specified by architects changed or replaced during construction?

8. When materials or brands specified by the architect are changed during construction, who usually initiates these changes?

9. What are the main reasons why materials or brands specified by the architect are changed?

USP Marketing Consultancy