

European Architectural Barometer Q2 2026

Report impression

Future of construction

August 2026

a product by USP Marketing Consultancy

Index

Background of the research

Management summary

Economic developments

Future of construction

Appendix



About European Architectural Barometer

THE GOAL

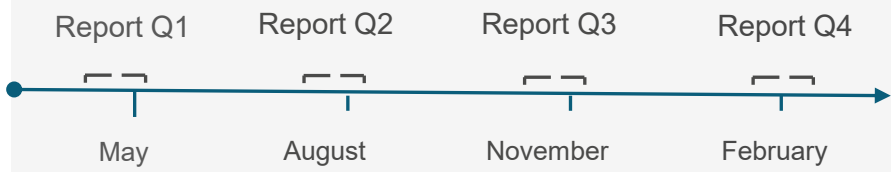
The objective of the European Architectural Barometer of USP Marketing Consultancy is to offer profound insight into the current economic situation and trends among architectural firms in the Netherlands, Germany, the UK, France, Spain, Italy, Belgium and Poland. The European Architectural Barometer 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)
Q2: Future of Construction
Q3: Architects' Brand Perception & Loyalty
Q4: The Role of Service & Support

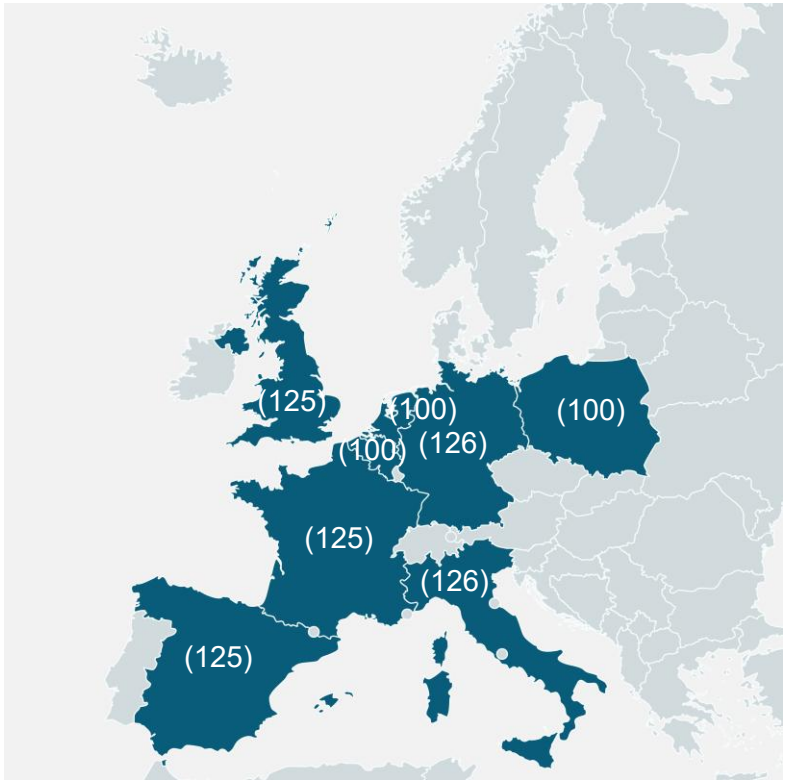
THE TIMELINE



COUNTRY SCOPE

(number of interviews conducted)

Background characteristics of the interviewed respondents can be found in the country-specific profiling, the architect chapter, and in the appendix as a European overview.



PROJECT TEAM



Jeroen de Gruijl
Consultant

+31 6 83979041
deGruijl@usp-mc.nl



Matko Jurkovic
Project manager

jurkovic@usp-mc.nl



Dirk Hoogenboom
Research Consultant

+31 652098924
hoogenboom@usp-mc.nl

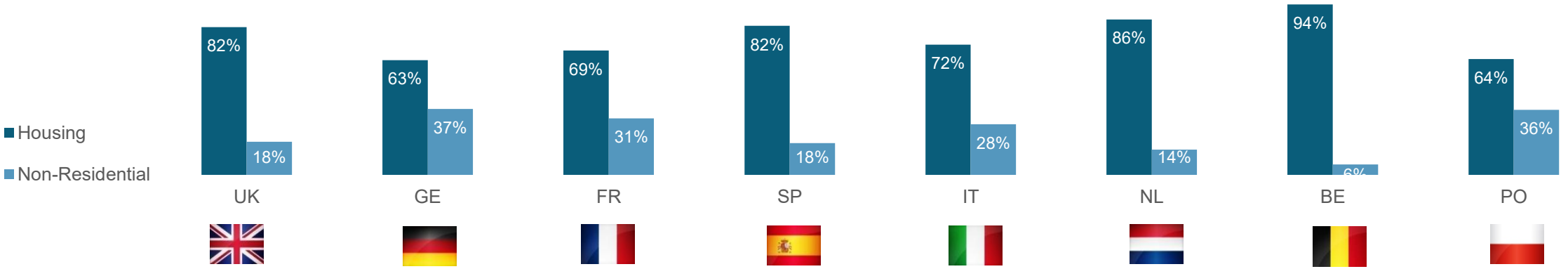
Background of the architects

The table below shows the average number of employees of the architectural firms within the current quarter of this research, divided by country. The architectural firms with one employee were excluded from this research. The second table shows the segments in which architects within this research are mostly active.

Number of FTE

Average	**6,5**	**6,0**	**4,0**	**6,1**	**3,7**	**6,9**	**5,4**	**6,5**
2 – 4 FTE	52%	44%	70%	54%	78%	42%	59%	55%
5 – 9 FTE	33%	40%	23%	33%	14%	24%	27%	24%
10 – 19 FTE	10%	12%	6%	8%	6%	17%	3%	17%
20 – 39 FTE	2%	4%	0%	4%	2%	8%	3%	3%
> 40 FTE	2%	0%	0%	2%	0%	0%	1%	1%

Segment mostly active



Index

Background of the research

Management summary

Economic developments

Future of construction

Appendix



Construction market forecast 2026





Construction market forecast 2027





Key insights – Future of construction

1

2

3

Europe.



Key insights – Future of construction

4

5

6



Strategic implication

T
d
re
m
ir

R
ir
M
s

S
b
s

A
R
c
ro

F
c
w

E
t
c
p

d



Index

Background of the research

Management summary

Economic developments

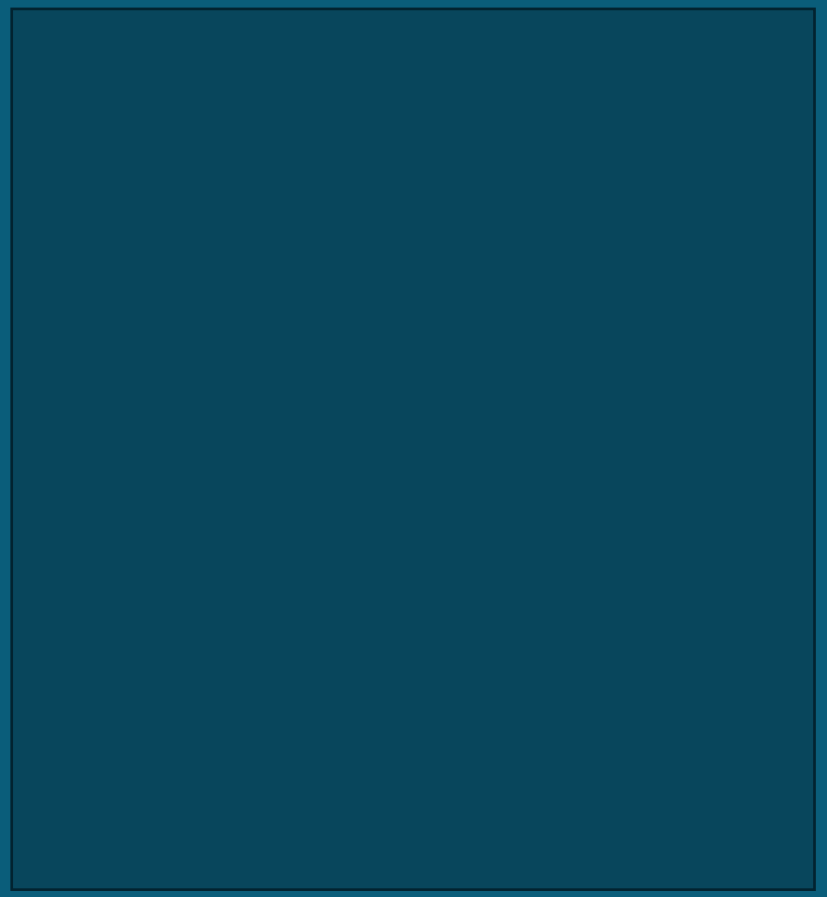
United Kingdom

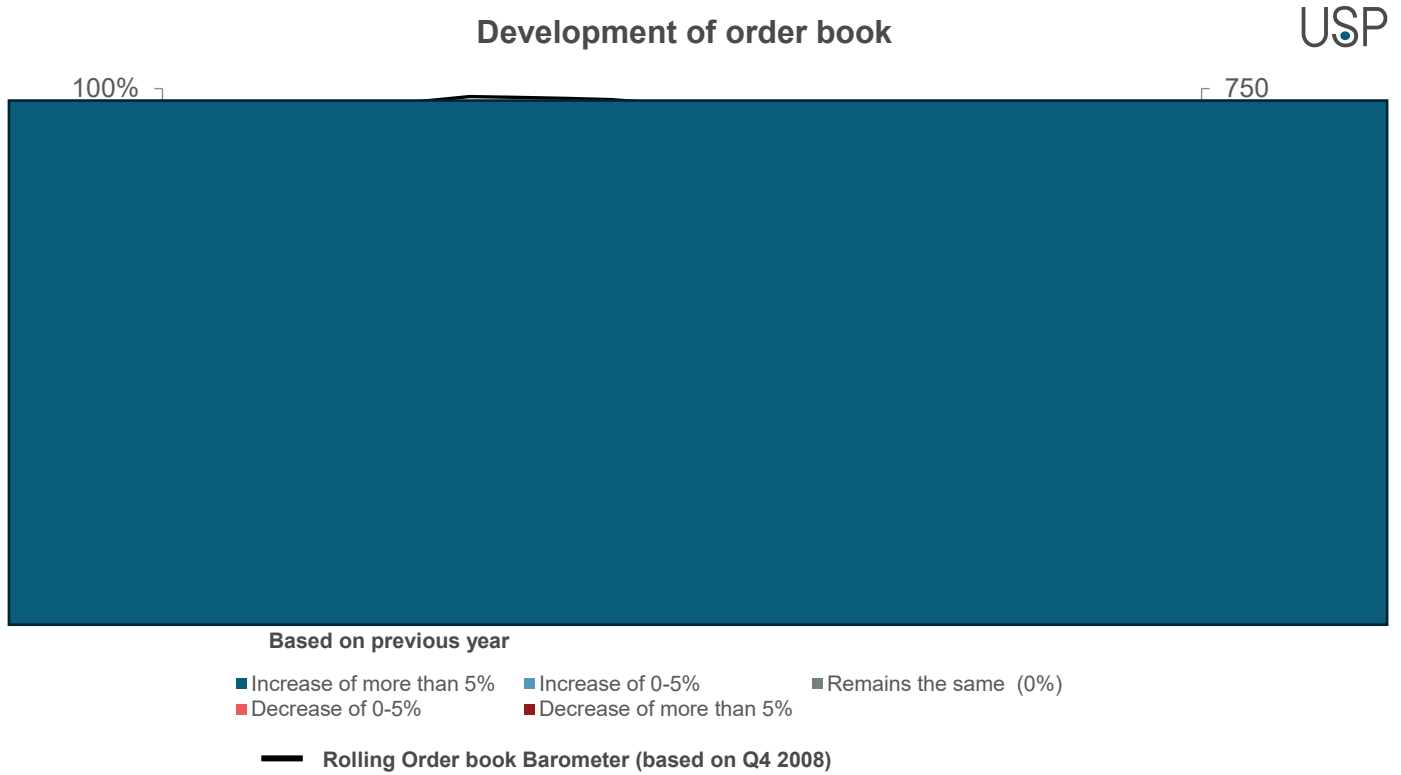
Future of construction

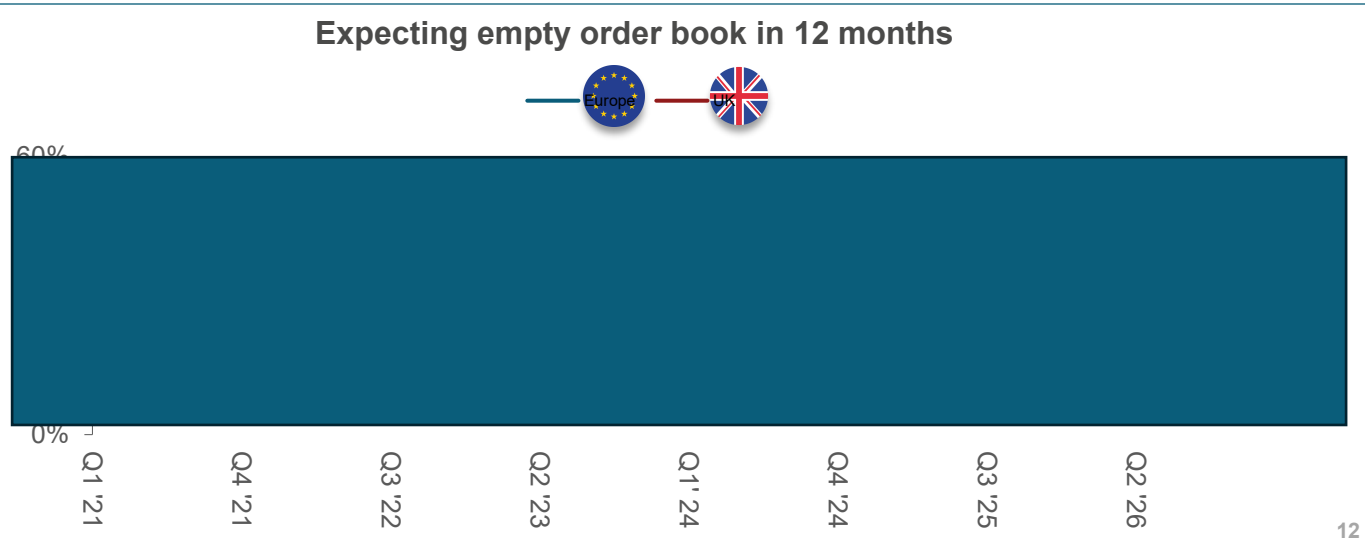
Appendix



Order books remain under pressure

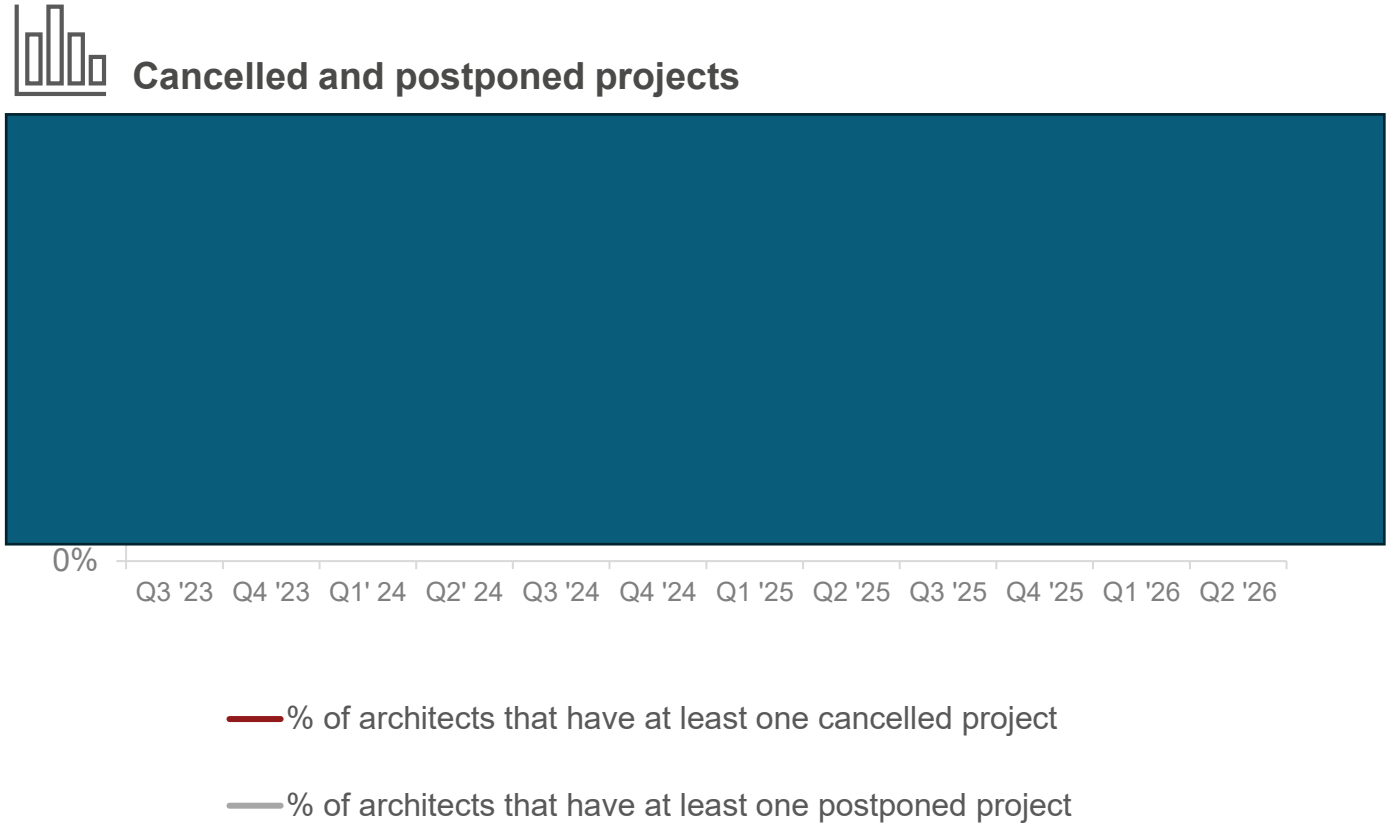




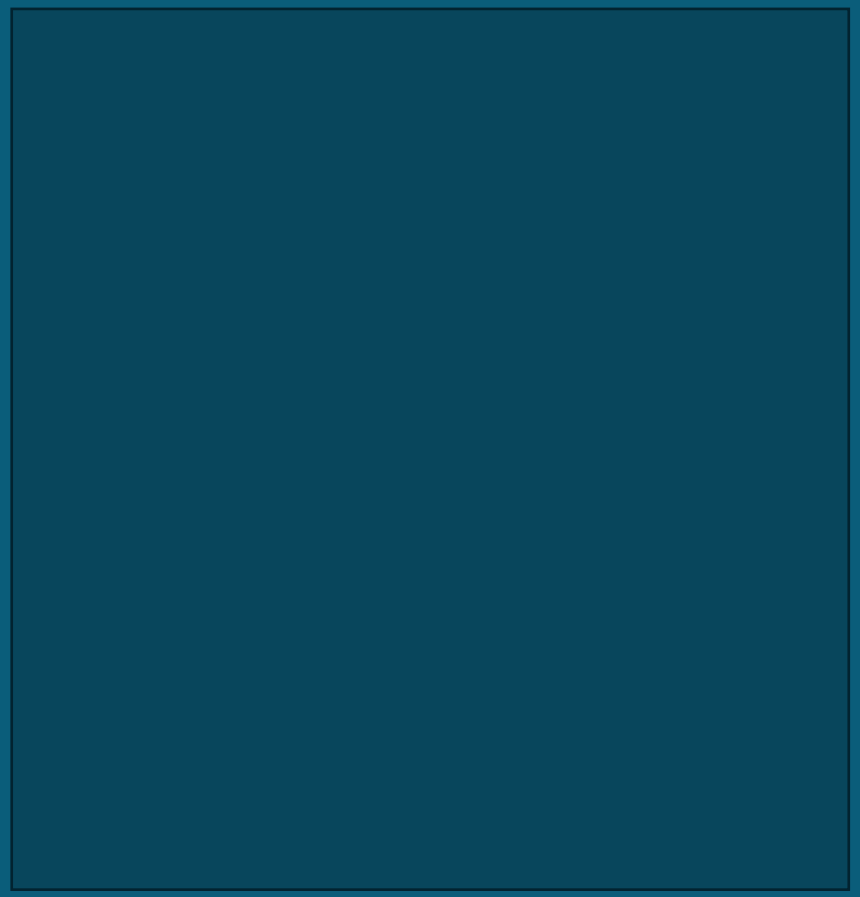


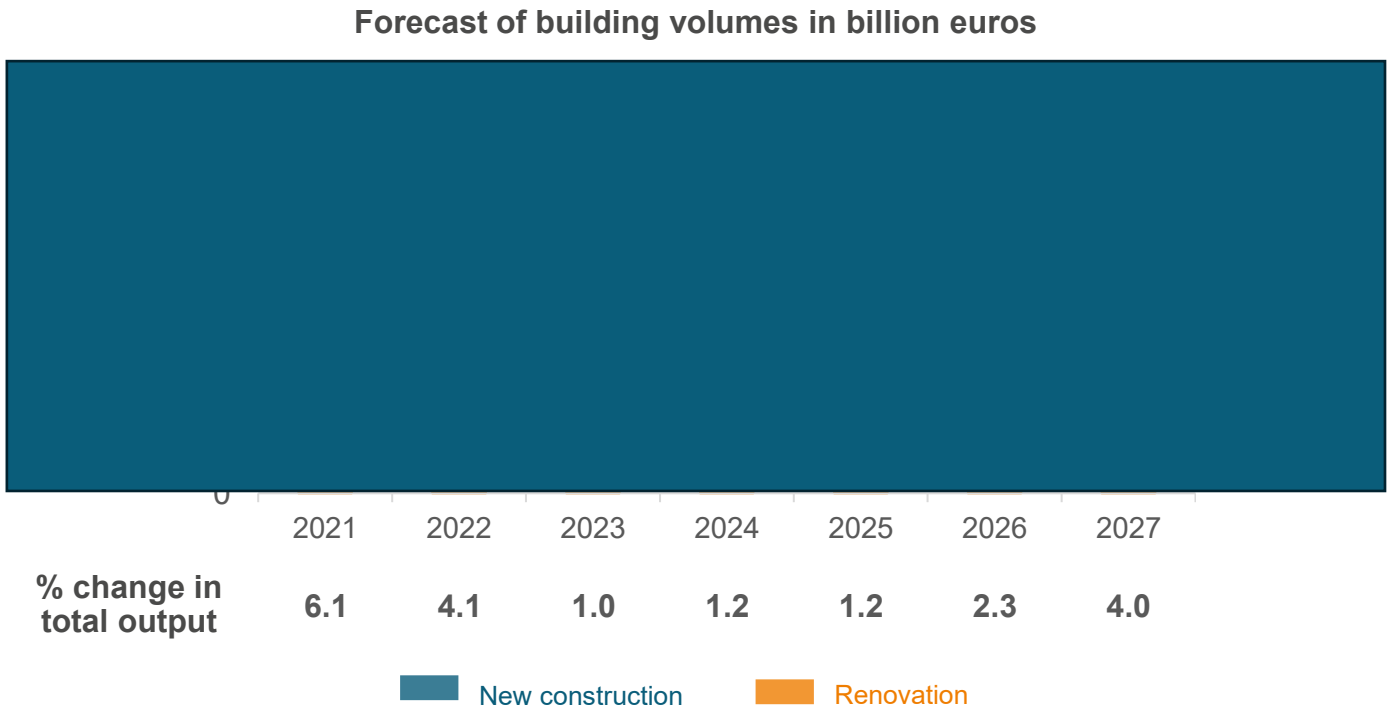
Delays remain common, but cancellations have eased

More than half of British architects report postponed projects. Cancellations increased slightly in Q2 ’26, but remain below the peak recorded at the end of 2025.



Modest growth expected in Great Britain





Index

Background of the research

Management summary

Economic developments

Future of construction

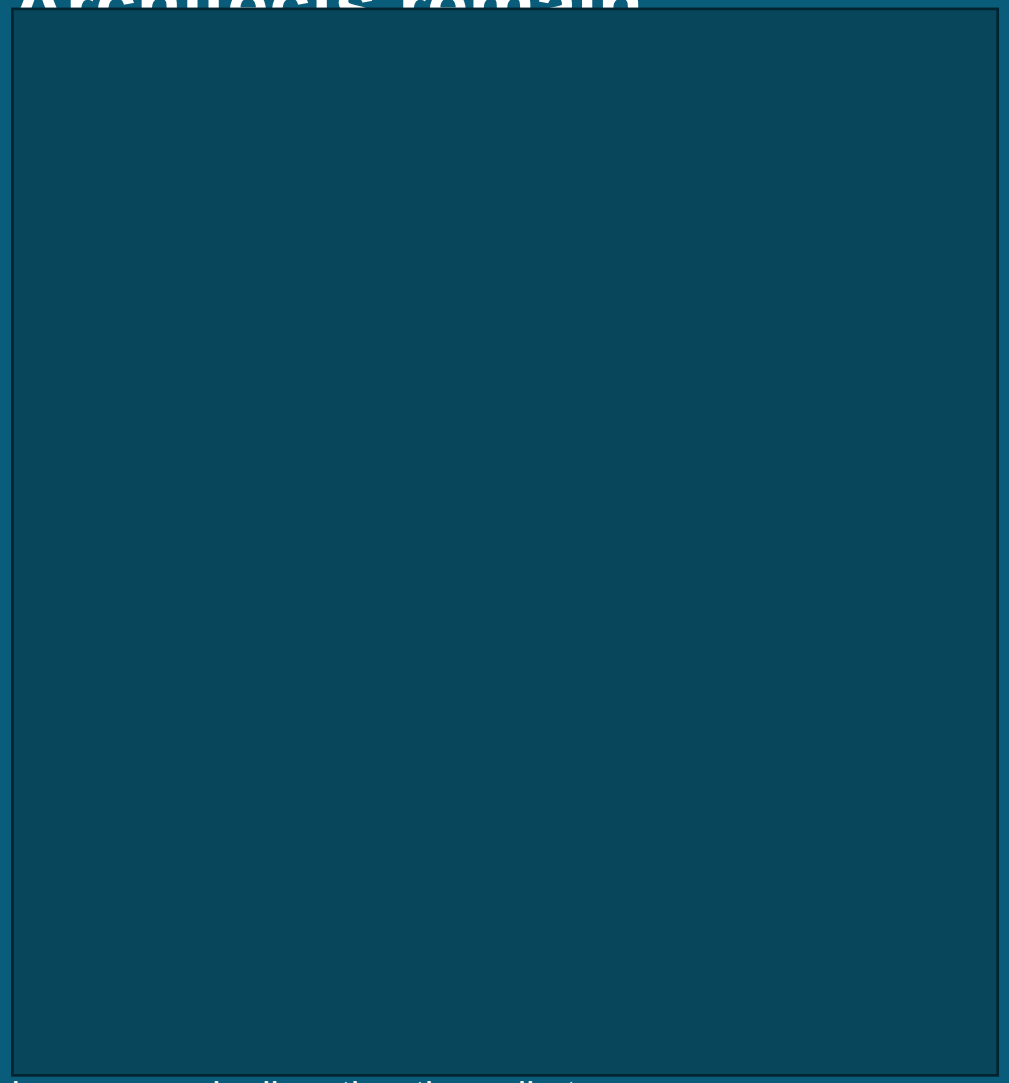
Main insights on a total level

Cross-country overview

Appendix



Architects remain



happen gradually rather than all at once.

23%

Of European architects think

46%

Of European architects are



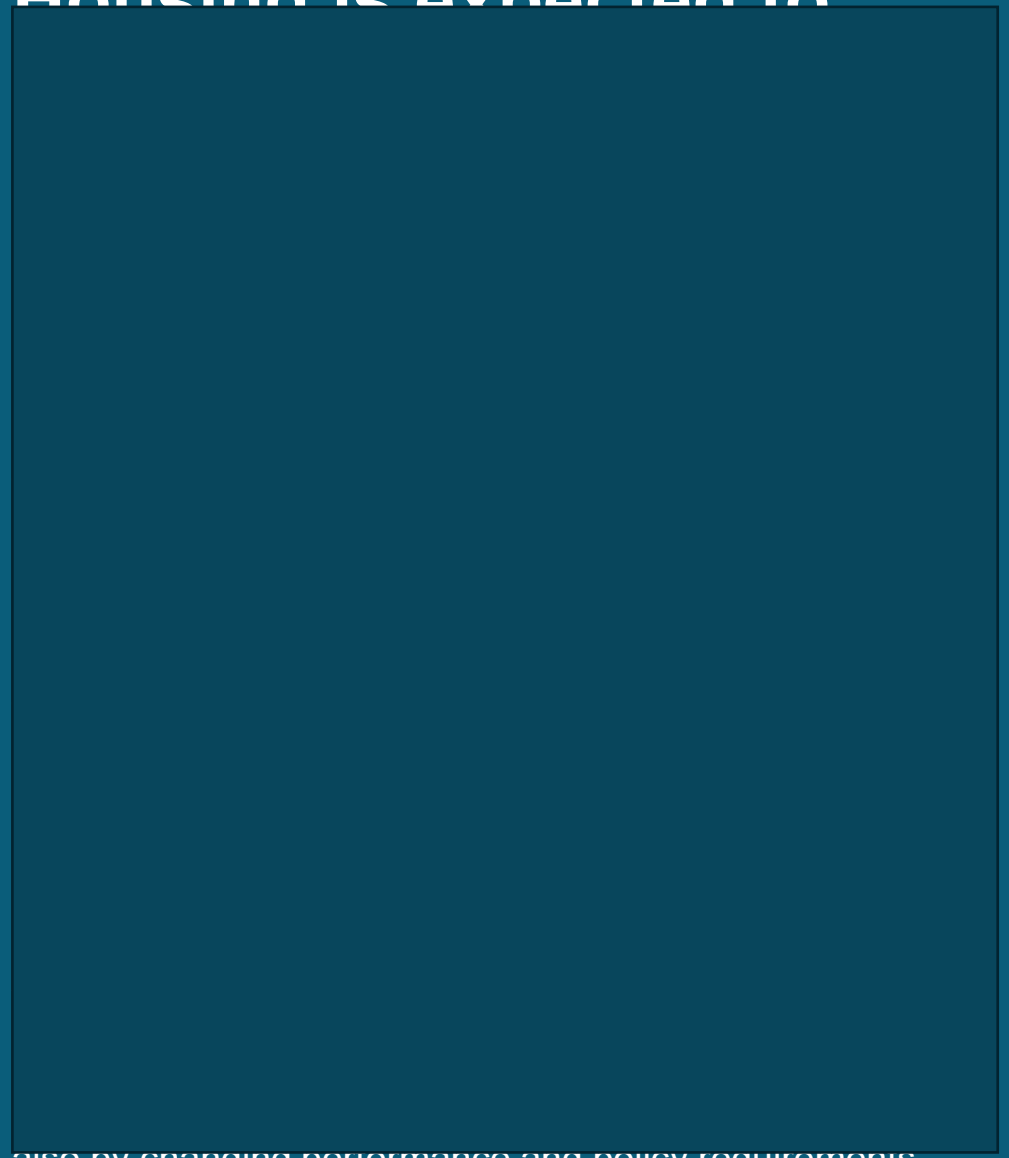
N=927

N=927

Preparation for expected changes in the construction industry – top 5



Housing is expected to



also by changing performance and policy requirements.

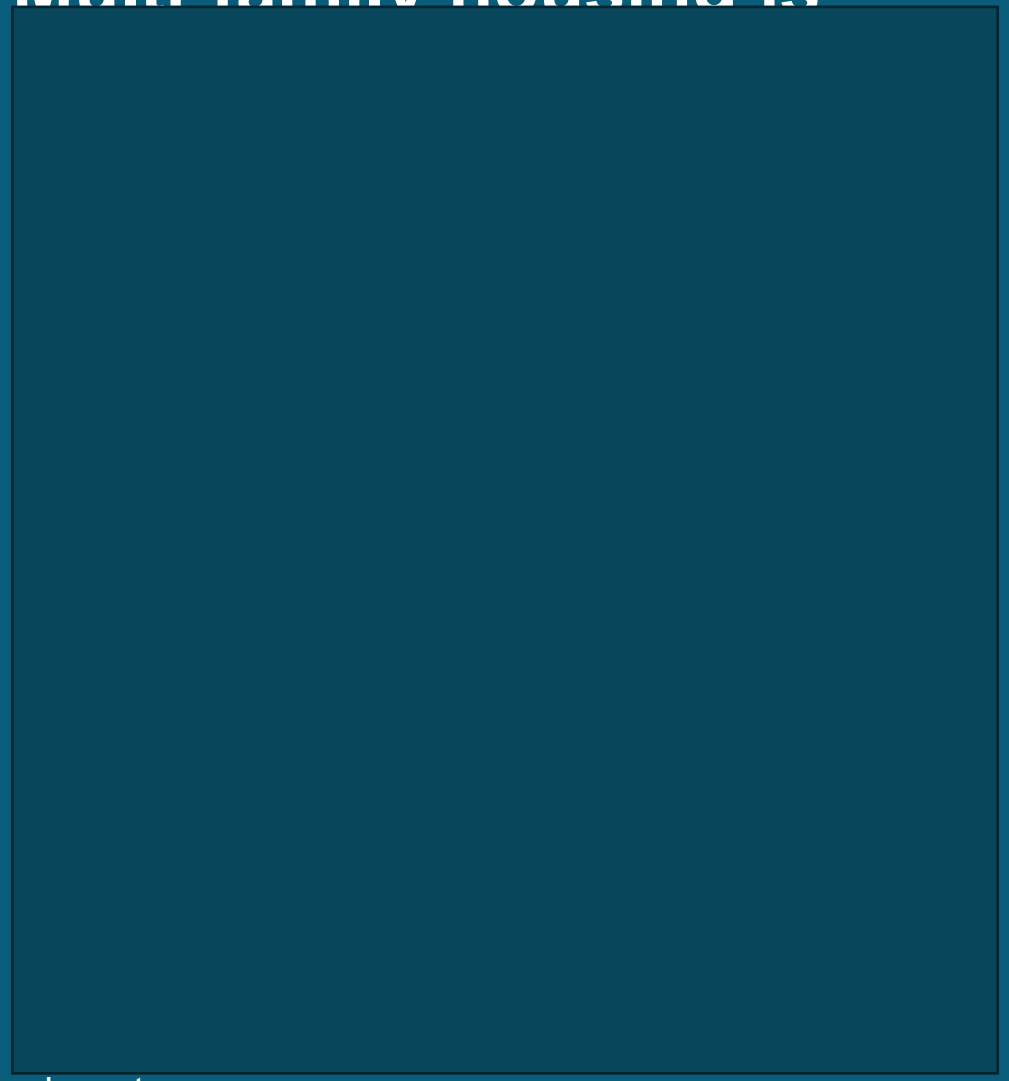
Construction segments expected to drive future growth – Top 5



Key drivers of future construction demand – Top 5



Multi-family housing is



relevant.

Construction segments expected to undergo the greatest transformation – Top 5



Key reasons behind the expected transformation of multi-family residential housing / apartment buildings – Top 5



AI, climate adaptation and regulation are reshaping

Trends shaping the construction industry over the next decade – top 5



Expected impact of key industry developments on architects' work over the next decade



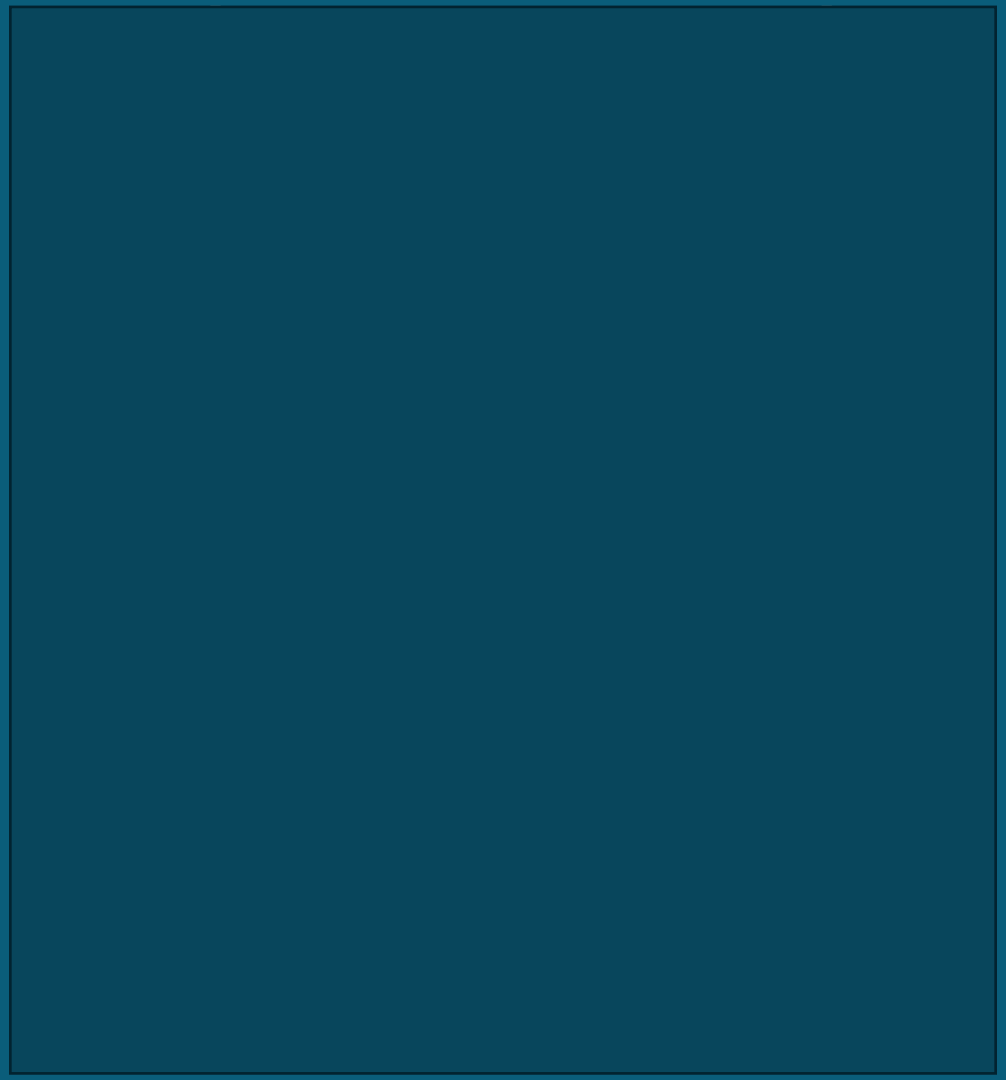
N=927

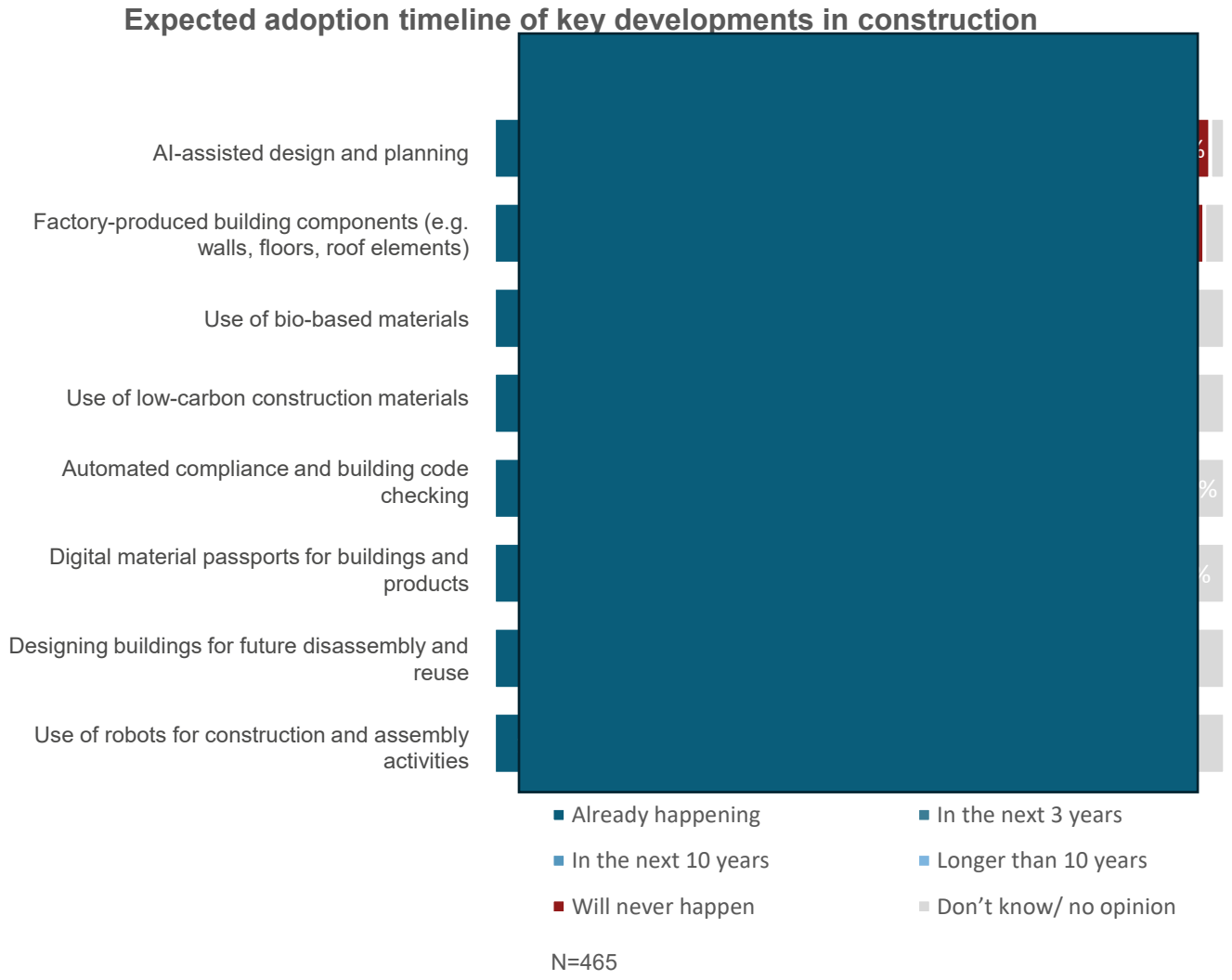
Future material choices

Material characteristics expected to gain importance over the next five years – Top 5



Digital and factory-based





Cost and uncertainty

Key barriers to future construction activity – Top 5

Index

Background of the research

Management summary

Economic developments

Future of construction

Main insights on a total level

Cross-country overview

Appendix



Confidence in the industry's readiness is far from uniform, suggesting that the pace and ease of adapting to future change may differ substantially by market.

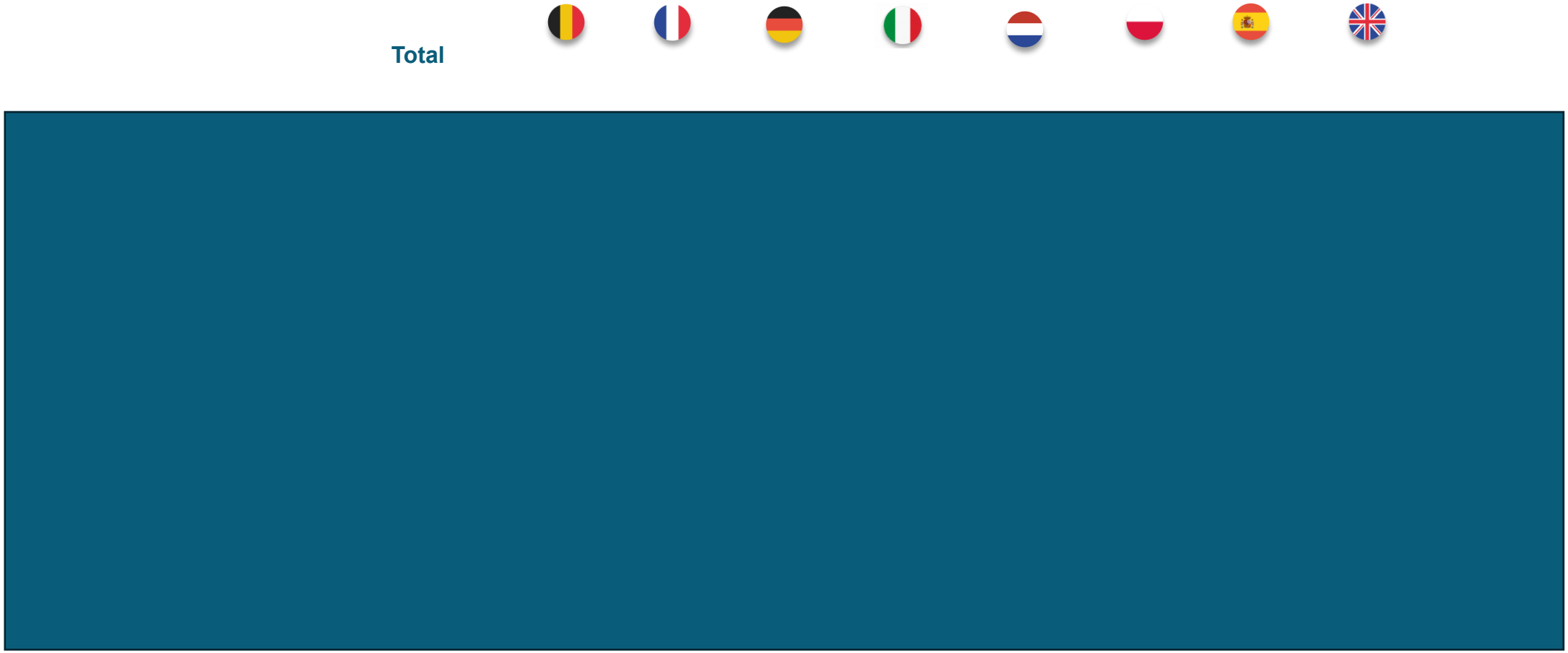
Perceived preparedness of the construction industry for future changes



Total N=927; Belgium N=100; France N=125; Germany N=126; Italy N=125; Netherlands N=100; Poland N=100; Spain N=125; UK N=126;.

Optimism is far from uniform across Europe: most markets lean positive, but the sizeable neutral and pessimistic shares, particularly in France and Belgium, point to continued uncertainty about the industry's longer-term outlook.

Optimism about the future of the construction industry



Total N=927; Belgium N=100; France N=125; Germany N=126; Italy N=125; Netherlands N=100; Poland N=100; Spain N=125; UK N=126;.

Preparation is mainly focused on building internal capabilities, with skills development leading in most markets, while deeper changes such as industrialised construction remain limited.

Preparation for expected changes in the construction industry – top 10



Total N=927; Belgium N=100; France N=125; Germany N=126; Italy N=125; Netherlands N=100; Poland N=100; Spain N=125; UK N=126;.

Growth expectations are concentrated in housing, but the mix differs by market, some lean heavily toward apartments, while others show a broader residential growth pattern across multi-family, single-family and social housing.

Construction segments expected to drive future growth – Top 10



Total N=927; Belgium N=100; France N=125; Germany N=126; Italy N=125; Netherlands N=100; Poland N=100; Spain N=125; UK N=126;.

The drivers of future demand vary across markets: housing pressure is central in several countries, while Italy and France place greater emphasis on climate adaptation and the energy transition.

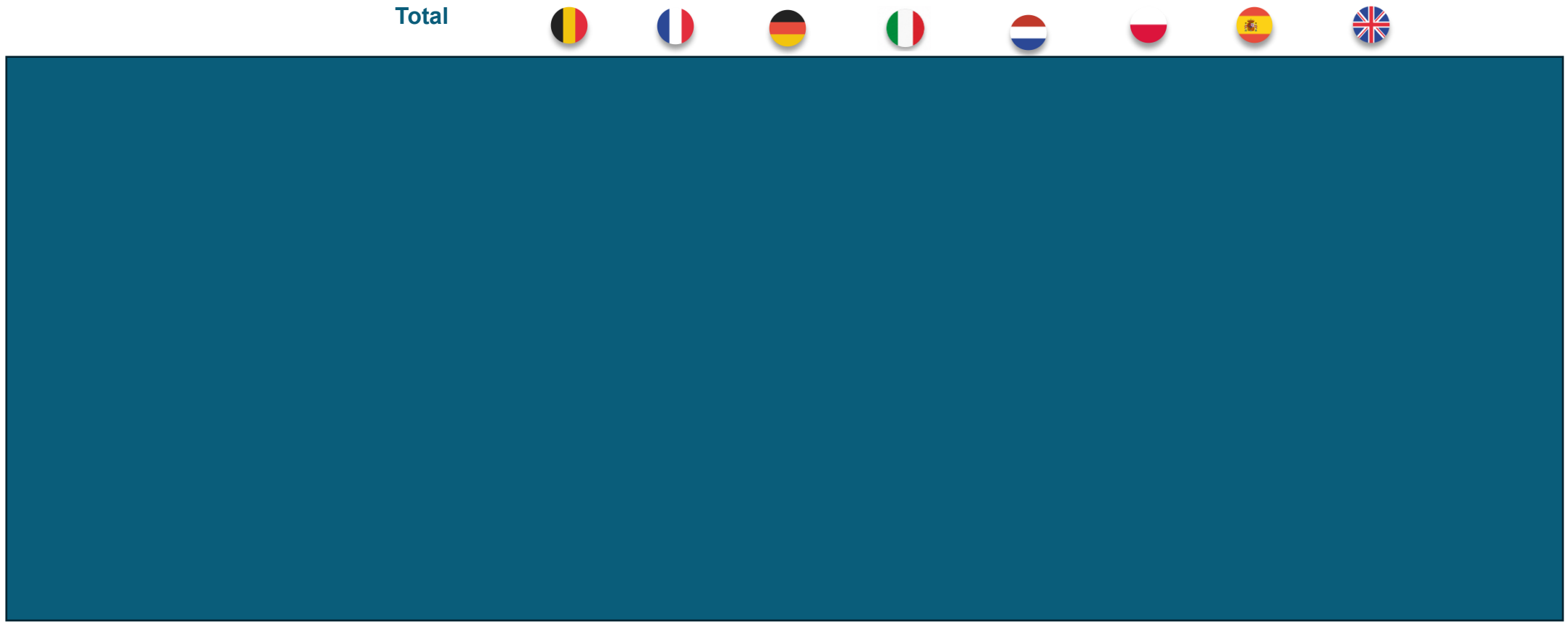
Key drivers of future construction demand – Top 10



Total N=465; Belgium N=51; France N=63; Germany N=63; Italy N=62; Netherlands N=51; Poland N=50; Spain N=63; UK N=63;.

Expected transformation is concentrated in residential construction, reinforcing housing as a key area of future industry change.

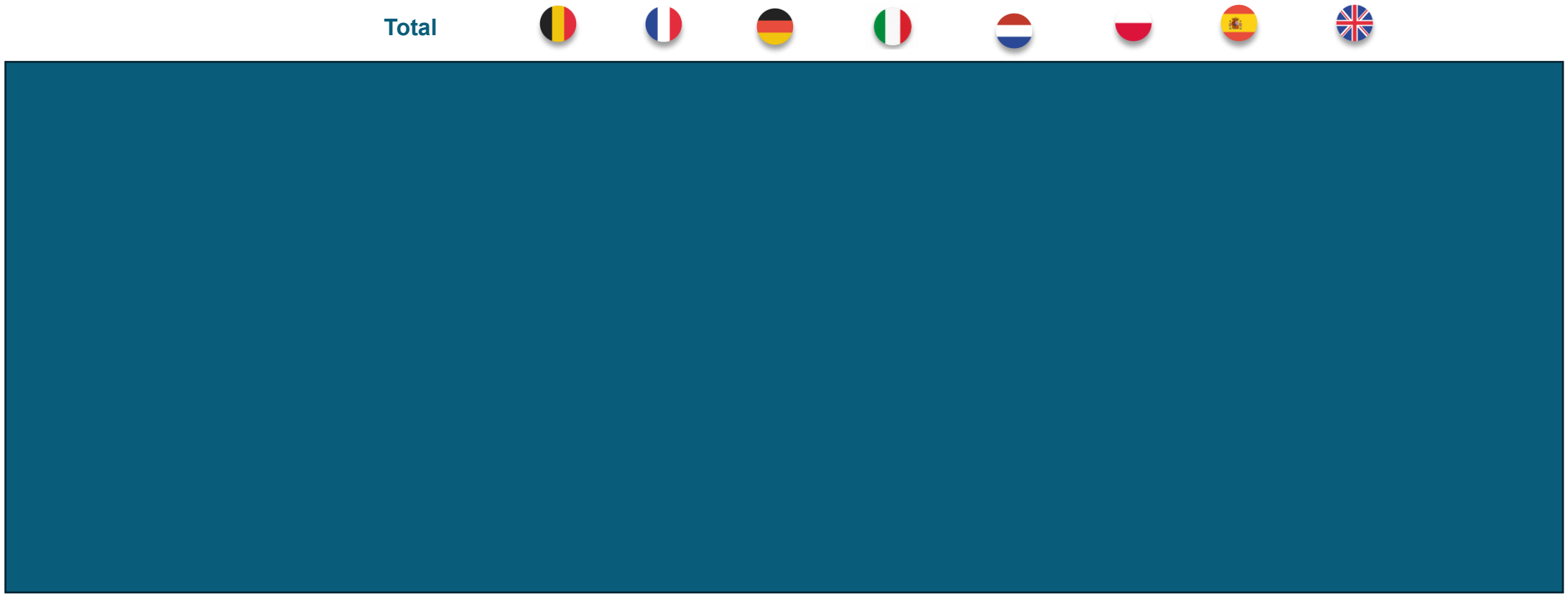
Construction segments expected to undergo the greatest transformation – Top 10



Total N=462; Belgium N=49; France N=62; Germany N=63; Italy N=63; Netherlands N=50; Poland N=50; Spain N=62; UK N=63;.

AI is emerging as the dominant future trend in several markets, while France stands out for climate adaptation and Spain for its stronger focus on off-site construction.

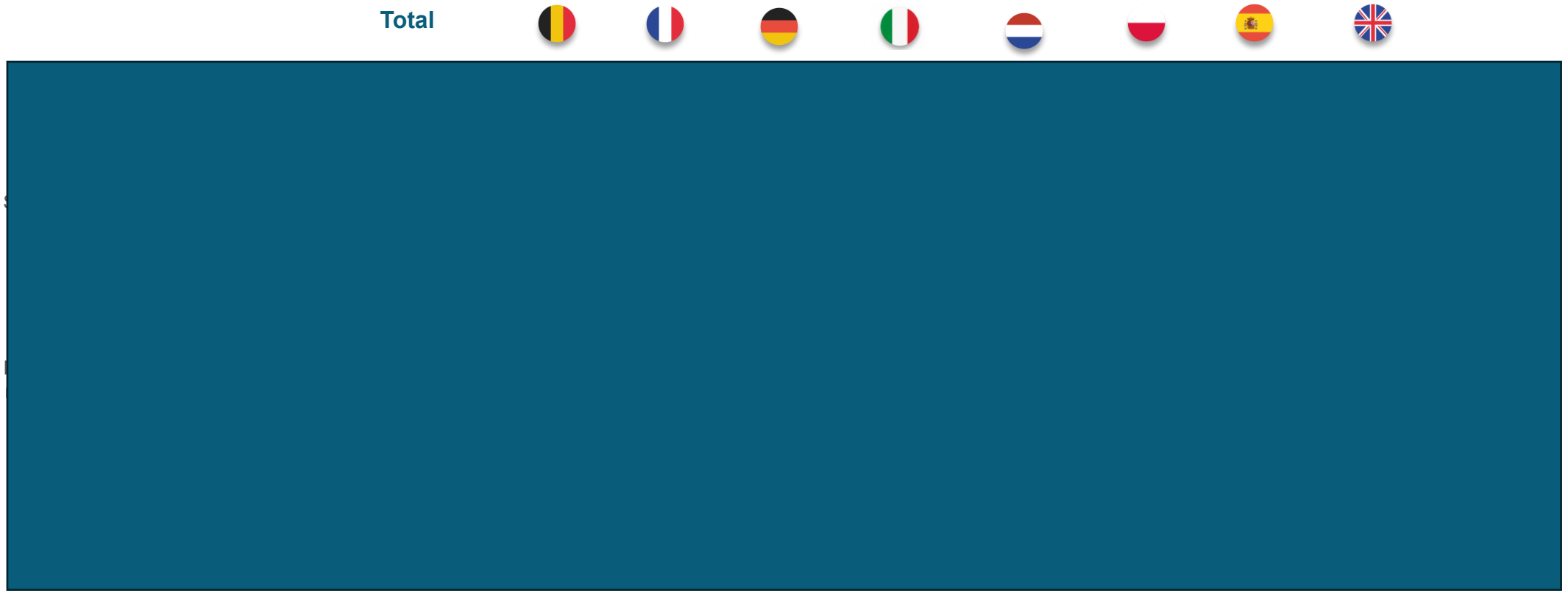
Trends shaping the construction industry over the next decade – top 10



Total N=927; Belgium N=100; France N=125; Germany N=126; Italy N=125; Netherlands N=100; Poland N=100; Spain N=125; UK N=126;.

Climate adaptation and compliance are expected to strongly affect architects across most markets, while the impact of material innovation and industrialised construction varies more between countries.

Expected impact of key industry developments on architects' work over the next decade



*% expecting a **moderate, significant or very large impact** over the next 10 years.*

Total N=918; Belgium N=100; France N=125; Germany N=121; Italy N=125; Netherlands N=100; Poland N=97; Spain N=125; UK N=125;.

Material priorities differ across markets, but most centre on balancing lower carbon impact with durability and cost efficiency rather than sustainability alone.

Material characteristics expected to gain importance over the next five years – Top 10

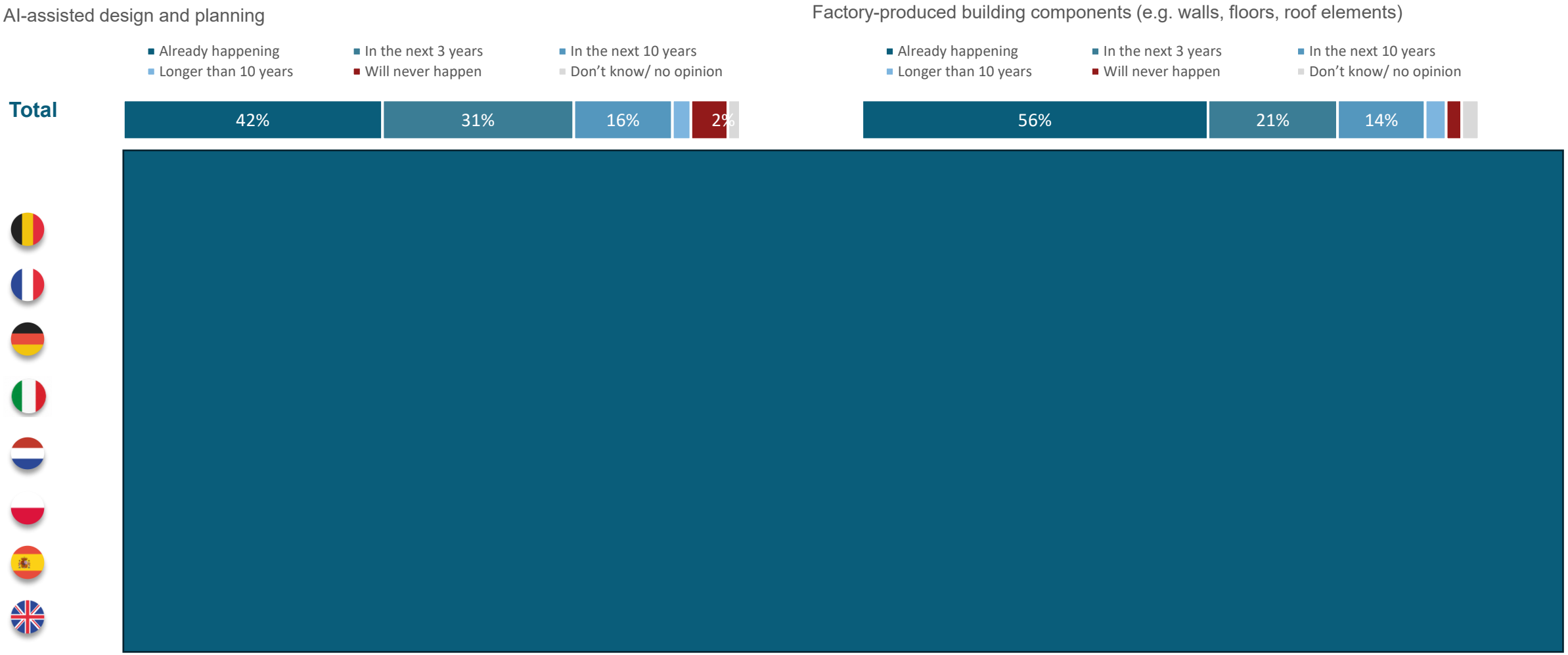


Total N=465; Belgium N=51; France N=63; Germany N=63; Italy N=62; Netherlands N=51; Poland N=50; Spain N=63; UK N=63;.

USP

AI-assisted design and factory-produced components are expected to become mainstream relatively quickly, although adoption is more advanced in some markets than others.

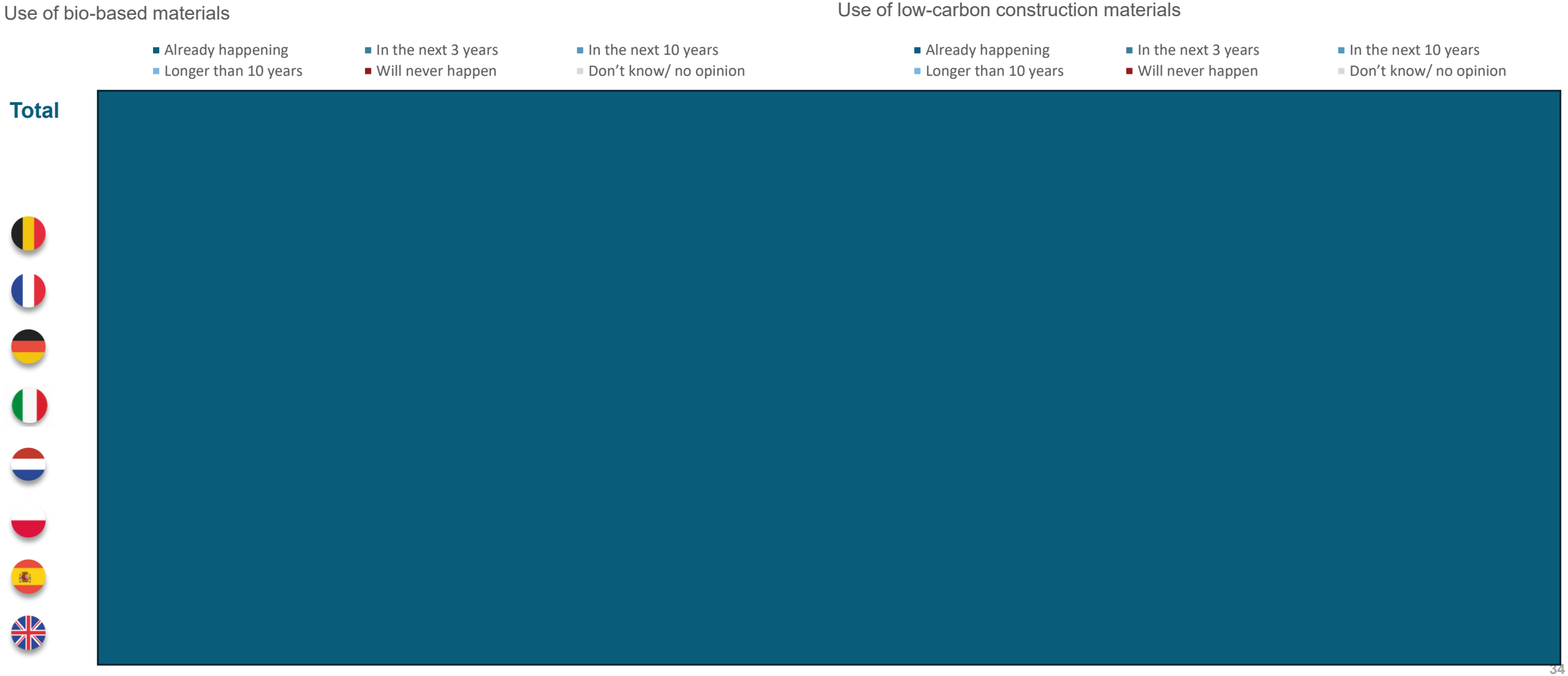
Expected adoption timeline of key developments in construction



Total N=465; Belgium N=51; France N=63; Germany N=63; Italy N=62; Netherlands N=51; Poland N=50; Spain N=63; UK N=63;.

Adoption of sustainable materials is progressing at different speeds, with France already well advanced while several other markets expect bio-based and low-carbon materials to become more established over the coming years.

Expected adoption timeline of key developments in construction



Total N=465; Belgium N=51; France N=63; Germany N=63; Italy N=62; Netherlands N=51; Poland N=50; Spain N=63; UK N=63;.

Digital compliance tools are expected to develop more gradually, with most markets seeing automated checks and material passports becoming standard over the coming years rather than being widespread today.

Expected adoption timeline of key developments in construction



Total N=465; Belgium N=51; France N=63; Germany N=63; Italy N=62; Netherlands N=51; Poland N=50; Spain N=63; UK N=63;.

Design for disassembly is already gaining some traction in several markets, while robotics is clearly a longer-term shift, with most architects expecting broader adoption only further into the future.

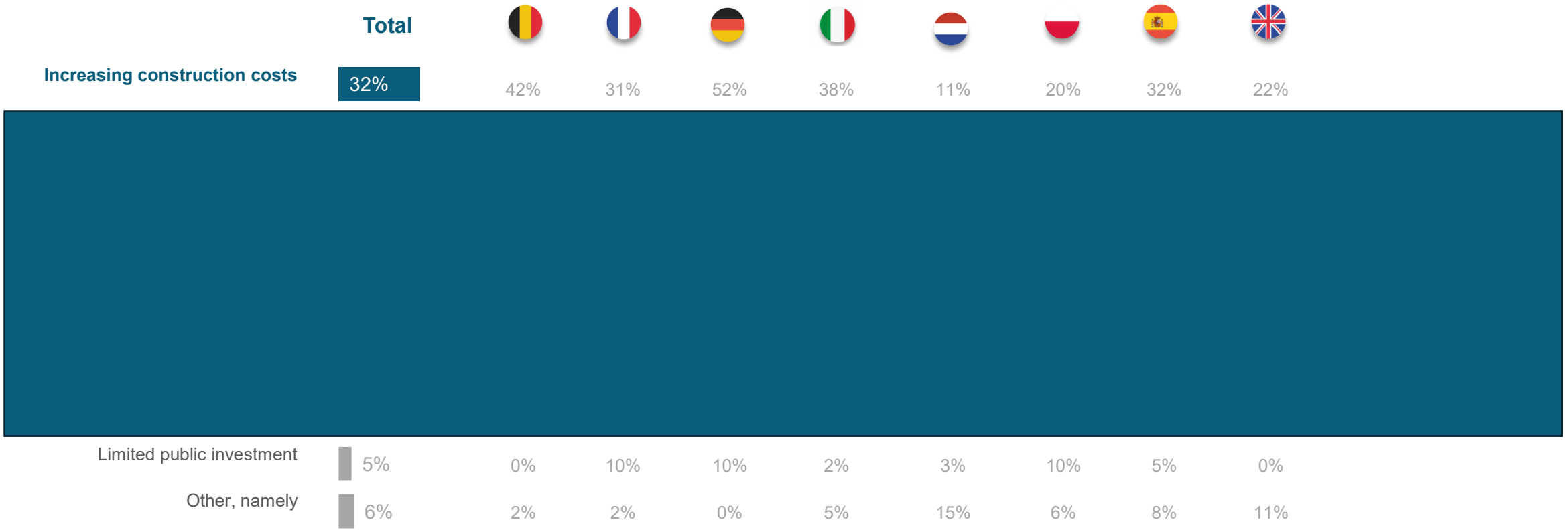
Expected adoption timeline of key developments in construction



Total N=465; Belgium N=51; France N=63; Germany N=63; Italy N=62; Netherlands N=51; Poland N=50; Spain N=63; UK N=63;.

The barriers differ strongly by market: costs dominate in Germany and Belgium, regulation is the key concern in the Netherlands, while the UK stands out for economic uncertainty.

Key barriers to future construction activity – Top 10



Total N=462; Belgium N=49; France N=62; Germany N=63; Italy N=63; Netherlands N=49; Poland N=50; Spain N=62; UK N=63;.

Architects are rarely the sole decision maker for bathroom brands, but they often have a seat at the table: around half are involved as co-decision makers, particularly in Germany, Italy and the UK. This suggests manufacturers need to influence architects as part of a broader decision-making unit, rather than treating them as the final brand selector.

Role in brand choice for bathroom products



Total N=927; Belgium N=100; France N=125; Germany N=126; Italy N=125; Netherlands N=100; Poland N=100; Spain N=125; UK N=126;.

Index

Background of the research

Management summary

Economic developments

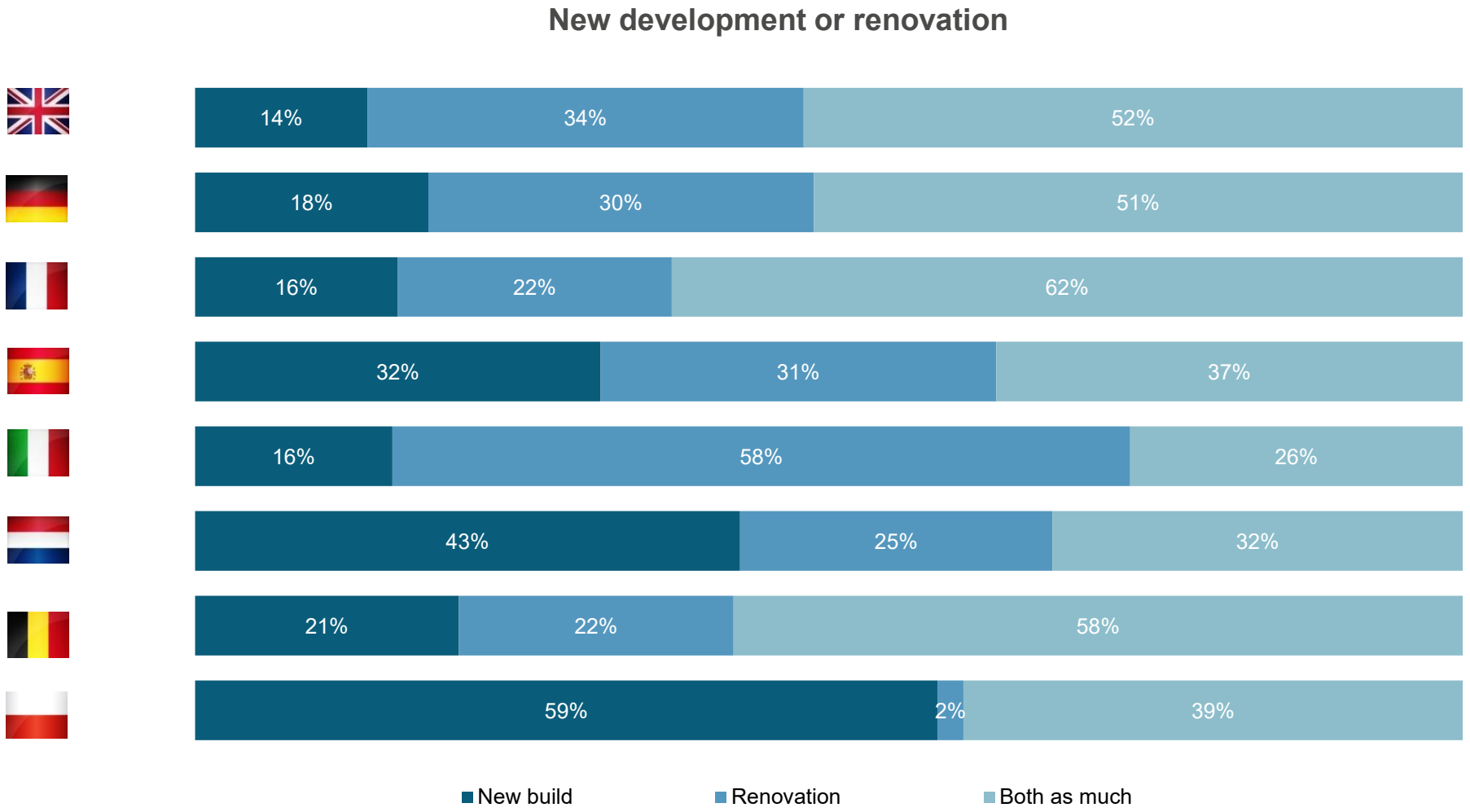
Future of construction

Appendix



Background of the architects

The figure below shows the split in activities in new build and renovation. Italy has the smallest new build. You can clearly see that most architects are active in the renovation segment and new-build segment. Almost half of the Polish architects do more new build, which is more than their colleagues from other European countries.



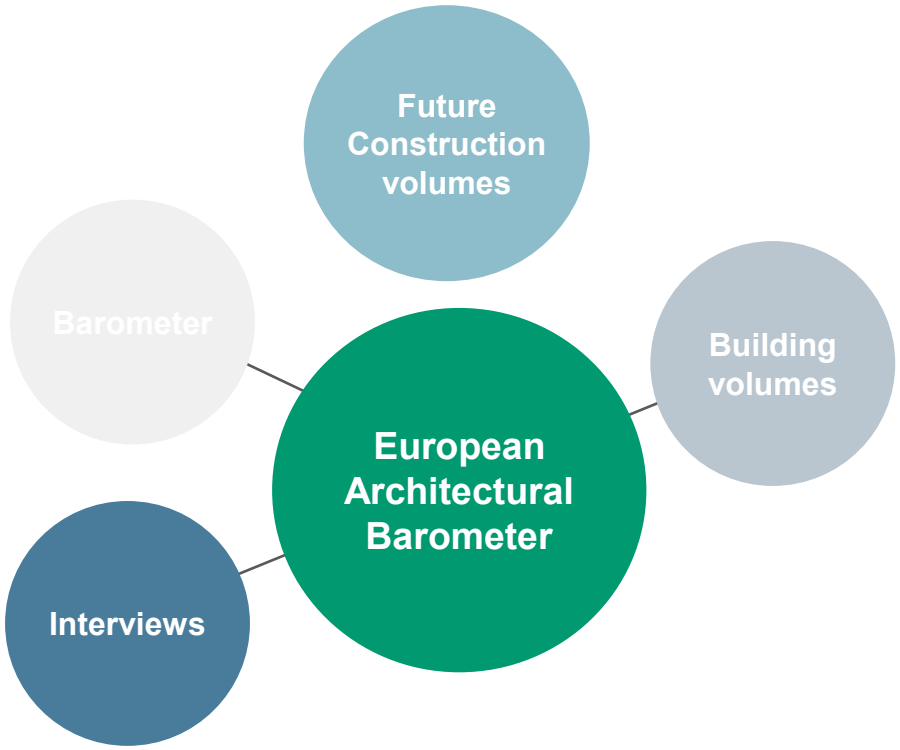
About European Architectural Barometer

European Architectural Barometer

Architects have already been monitored by several institutes in quite diverging ways in the different countries. USP launched this European Architectural Barometer for a more cohesive view. The European Architectural Barometer is extremely useful for organisations with a focus on Europe that also want to compare the activities of architects in different countries.

Interviews

All interviews are conducted by native speakers. From the third measurement onwards, two hundred interviews per country have been completed per measurement. The first two measurements were based on one hundred interviews per country. Later, for the Netherlands and Belgium, the measurements returned to one hundred interviews.



Future construction volumes

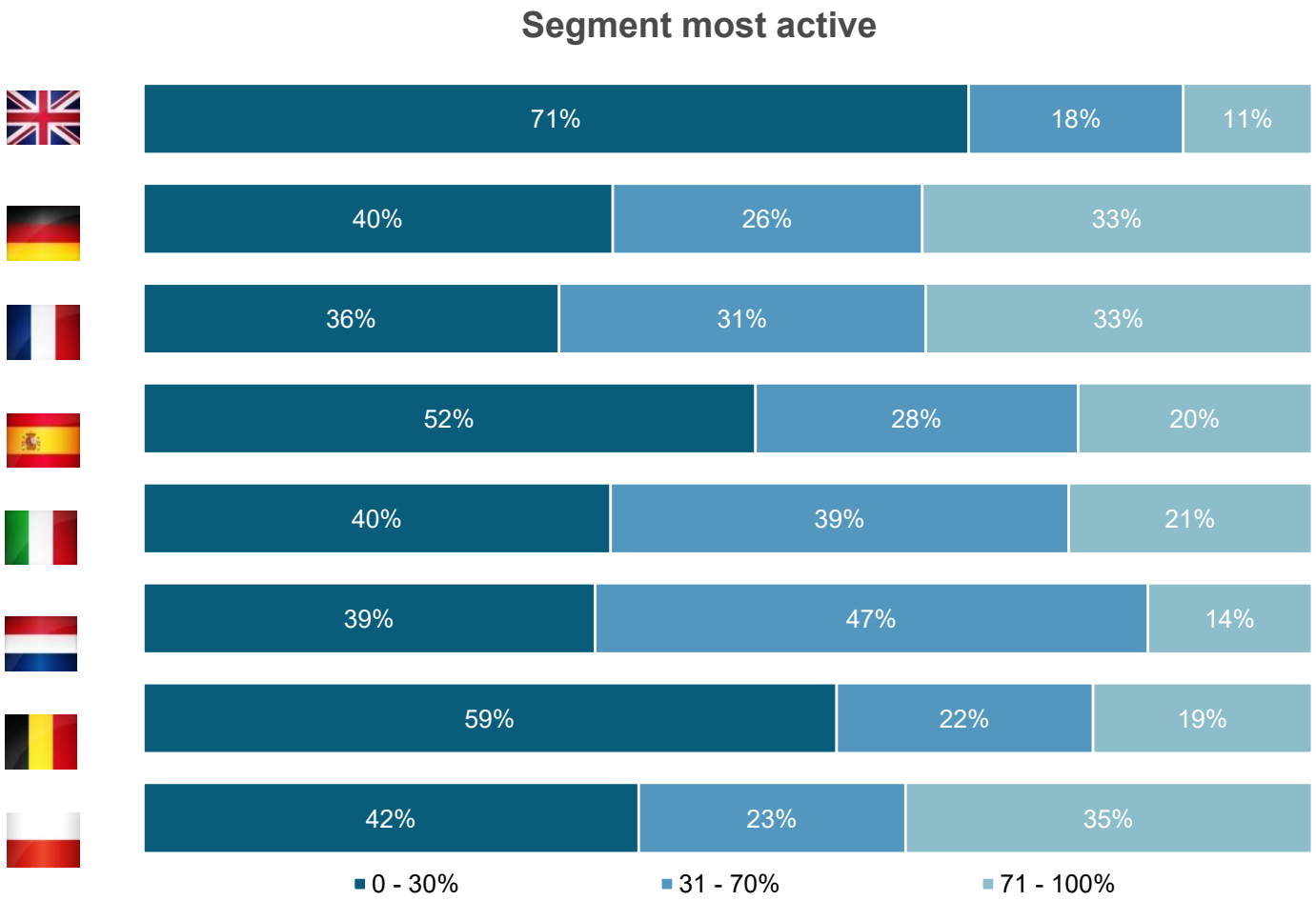
For decision makers charged with considerations of company resources, staffing and marketing strategy, a clear insight into future construction volumes is essential. However, economic indicators seldom provide an adequate picture of these volumes.

Building volumes

The construction industry operates in a delayed cyclical market, which means that buildings designed today will not be ready until at least two years from now. The economic activities of architectural firms provide a strong indication of the direction in which the construction sector will develop in terms of both building volumes and the way in which building volumes will be realised.

Results per segment

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



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

- **How did the turnover develop in this quarter compared to the previous quarter?**
- **How did your order book develop in this quarter compared to the same quarter last year?**
- **Do you expect that your order book might be empty these coming 12 months?**

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%

Methodology calculation of the Q2Q Saldo and Barometer

The European Architectural Barometer for the order book development and turnover development is calculated in the following way:

1. Respondents with a strong increase (>5%) are multiplied by 100
2. Respondents with a slight increase are multiplied by 50
3. Respondents that remained the same are multiplied by 0
4. Respondents with a slight decrease are multiplied by –50
5. Respondents with a strong decrease (>5%) are multiplied by –100
6. The sum of these values divided by 100, results in the Q2Q saldo.
7. Adding 100 to this saldo results in the Barometer figures, where 0 is the strongest possible decrease, 100 is stabilisation and 200 is the strongest possible increase.

The Barometer values calculated this way are presented in the report as Quarter to Quarter Turnover and Order book Barometer.

Example of calculation Q2Q Barometer value:

Development Turnover Spain	Q2 '15		Calculated Values
Increased by more than 5%	25%	x 100	2500
Slightly increased (0-5%)	28%	x 50	1400
Stayed the same (0%)	36%	x 0	0
Slightly decreased (0-5%)	3%	x -50	-150
Decreased by more than 5%	8%	x -100	-800

Q2Q Saldo = (2500 + 1400 – 150 – 800) / 100 = 30

Q2Q Barometer value = 100 + 30 = **130**

Methodology calculation of the Q2Q Saldo and Barometer

To calculate the developments in the turnover and the order book with regard to the first measurement in 2009, USP has developed the so-called Rolling Barometer. The Rolling Barometer is calculated as the cumulative sum of the Q2Q saldos of every quarter. The Rolling Barometer can drop or rise by 100 points per quarter at maximum.

Example: The Rolling Order Book Barometer is -66 after twelve quarters. In the worst case (all architects reporting a decrease of over 5% every quarter) the Rolling Barometer would be -1200. In the best case it would be 1200. Therefore, a score of -66 in Q4 2011 means a slightly worse situation than in Q4 2008.



Barometer order book

	Q1'09	Q2'09	Q3'09	Q4'09	Q1'10	Q2'10	Q3'10	Q4 '10	Q1 '11	Q2 '11	Q3 '11	Q4 '11
Q2Q Barometer values	71	75	100	85	100	110	94	94	111	102	94	99
Saldo Q2Q Values	-29	-25	0	-15	0	10	-6	-6	11	2	-6	-1
Rolling Barometer Values	-29	-54	-54	-69	-69	-59	-65	-71	-60	-59	-65	**-66**

+ (-25) + (0) + (-15) + etc.

Future building volumes: building a model for prediction

Building volumes

Architects are at the front of the construction sector. They are the first to perceive positive and negative changes. The current developments of architectural firms have a strong predictive impact on the total market. USP publishes its predictions for the building volumes based on the developments experienced by architects.

The model

USP uses a model based on eleven market indicators and USPs own results. The model combines information about the economy, like construction requests and confidence figures, with data about the developments within architects' experience, such as changes in the turnover and the number of active architects. Only information that proved to have a strong correlative value on the building volume is used. Subsequently, every kind of data is weighed based on the predictive value.

High predictive value

To ensure the correctness of the predictive value, the model has been – with retroactive effects – compared to the actual growth and shrinkage of the construction volume since 2003 for the Dutch* market and since Q3 2009 for the remaining countries. The model turns out to possess a very high predictive value. Nevertheless, the forecast has to be interpreted with caution, as it remains a calculation. As with all predictions, the margin of error can be larger, comparable to the weather forecast: sometimes the USP model can be inaccurate.

Calculation predictive value

The predictive value is calculated based on the consistency of the market indicators with construction volumes, for the renovation, maintenance and the new build markets. The correlation is determined by a regression analysis, i.e. a statistical technique for analysing data in which there is a (possible) specific connection, known as regression.

** Since 2003, the developments of architects in the Netherlands have been monitored by USP's sister organisation BouwKennis. Therefore, it is possible for the Netherlands to calculate the connection between the architects and the building volume based on 10 years of data.*

Future building volumes: Calculation

The Dutch market has been taken as a basis. The correlation between market volume regarding new build, maintenance and renovation on the one hand, and possible explanatory factors on the other hand, serves as a starting point.

The correlation with building volumes is tested for a total of eleven market indicators together with two outcomes of the European Architectural Barometer. The correlation of the following four indicators appeared to be strongest:

- Building permits – m² of useful floor area in non-residential buildings
- Building permits, number of dwellings
- Development of Turnover Barometer (European Architectural Barometer figures)
- Number of FTE working at architectural companies (European Architectural Barometer figures)

The predicting value of these indicators is between 54% and 91%. Because a longer history of data was not available for most countries, the development of these four indicators in the last four quarters and the four quarters before served as a guidance for this measurement. The used range of five indicators is not static and can be adjusted for future calculations. With the database becoming more complete, more reliable correlations can adjust the mix of indicators. A longer range of regression measurements shall replace the comparison of the last four quarters with the four quarters before.

The forecast is based on the market knowledge of USP Marketing Consultancy together with the market figures available, such as building permits and the developments among architects who are mainly active in renovation or new build as well as mainly active in residential or non-residential. Due to the limited number of quarters, a forecast based on a statistical model is not possible for now. The model that was used has a lower prediction value for this period. However, USP Marketing Consultancy aims at clarifying the general direction of the construction market development by publishing these data and the predictions will be updated in the coming reports.

Questionnaire – Standard

These questions are asked every measurement

1. How many employees (in FTE) does your company currently have, including yourself? [if less than 2 FTE, end of research]
2. As an architectural firm, are you mostly active in the segment housing, non-residential building, interior, or landscaping? [If interior or landscaping, end of research]
3. What is your position?
4. How many employees in FTE did your company have at the end of 2023?
5. How many employees in FTE did your company have at the end of 2022?
6. How many employees in FTE did your company have at the end of 2021?
7. If your turnover should relate to housing and non-housing, what percentage of your revenue do you get from housing-related jobs?
8. Are you mostly active in new build or renovation?
9. How did the turnover develop this quarter compared to the previous quarter? Decreased by more than 5%; slightly decreased (0-5%); stayed the same (0%); slightly increased (0-5%); strongly increased (more than 5%)
10. What are your expectations for the development of your turnover in the fourth quarter of 2022 in comparison to the turnover in the fourth quarter of 2021? Decreased by more than 5%; slightly decreased (0-5%); stayed the same (0%); slightly increased (0-5%); strongly increased (more than 5%)
11. How did your order book develop in this quarter compared to the same quarter previous year? Decreased by more than 5%; slightly decreased (0-5%); stayed the same (0%); slightly increased (0-5%); strongly increased (more than 5%)
12. How many new projects has your company scored/been commissioned in the past two months?
13. How many projects have been postponed in this quarter?
14. How many projects were not started and cancelled in this quarter?
15. Do you expect that your order book might be empty these coming 12 months?

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

Future of construction

1. Which trends do you believe will change the construction industry in the coming 10 years the most?
2. To what extent do you expect the following developments to impact your work as an architect over the next 10 years?
   - AI-assisted design
   - Stricter regulations and compliance requirements
   - Climate adaptation requirements
   - Material innovation
   - Industrialised and prefabricated construction methods
   - Changing demand across building segment
3. How are you or your organisation preparing for the changes expected in the construction industry over the next 10 years?
4. How well prepared do you believe the construction industry is for the changes expected over the next 10 years?
5. Overall, how optimistic are you about the future of the construction industry over the next 10 years?
6. Which construction segments do you expect to show the strongest growth over the next 5 years?
7. When do you expect the following developments to become standard practice in construction projects?
   - AI-assisted design and planning
   - Factory-produced building components
   - Use of bio-based materials
   - Use of low-carbon construction materials
   - Automated compliance and building code checking
   - Digital material passports for buildings and products
   - Designing buildings for future disassembly and reuse
   - Use of robots for construction and assembly activities
8. Which material characteristics will become most important in construction projects over the next 5 years?
9. Which factors do you believe will drive demand for construction projects the most over the next 5 years?
10. Which construction segment do you expect will undergo the greatest transformation [change the most in terms of design, construction methods and user requirements] over the next 5 years?
11. Why do you expect this segment, which you answered in the previous question, to undergo the greatest transformation over the next 5 years?
12. Which factors do you believe could slow down construction activity the most over the next 5 years?
13. When it comes to brand choice for bathroom products, what is your role?

USP Marketing Consultancy

© 28 October 2026, USP Marketing Consultancy B.V.

The information in this publication is strictly confidential and all relevant copyrights, database rights and other (intellectual) property rights are explicitly reserved. No part of this publication may be reproduced and/ or published without the prior written permission of USP Marketing Consultancy B.V.