Overall size of homes seems to be softening

% of respondents reporting “increasing” minus % reporting “decreasing”; data from Q1 2015-2019

Source: The American Institute of Architects Home Design Trends Survey
Easing in home sizes coming from lower end of market

% of respondents indicating that square footage of homes in category is “increasing” minus % reporting “decreasing”; data from Q1 2019

Source: The American Institute of Architects Home Design Trends Survey
FIGURE 3  Rental units/accessory dwellings continue to remain popular but see a decrease from last year

% of firms reporting “increasing” minus % reporting “decreasing”; data from Q1 2019 compared to data from Q1 2018

Source: The American Institute of Architects Home Design Trends Survey
FIGURE 4  Accessibility remains popular for home layout design

% of firms reporting “increasing” minus % reporting “decreasing”; data from Q1 2019 compared to data from Q1 2018

- Easier accessibility within home: 61% - 58% = 3%
- Easier accessibility into and out of home: 50% - 52% = -2%
- Single-floor design: 43% - 47% = -4%
- Finishing unfinished spaces (e.g., basements, attics, garages): 40% - 46% = -6%
- Open space layout/flexible floor plans: 56% - 45% = 11%

Source: The American Institute of Architects Home Design Trends Survey
Emphasis on outdoor improvements and outdoor living space continues to increase

% of firms reporting “increasing” minus % reporting “decreasing”; data from Q1 2019 compared to data from Q1 2018

Source: The American Institute of Architects Home Design Trends Survey
FIGURE 6  Properties that pose design and lot preparation challenges continue to be popular while green fencing options grow in popularity

% of firms reporting “increasing” minus % reporting “decreasing”; data from Q1 2019 compared to data from Q1 2018

- Difficult lot preparation: 49% - 54% (5% decrease)
- Low-irrigation landscaping/low-maintenance: 47% - 52% (5% increase)
- Increased building density on lots: 50% - 49% (1% decrease)
- Green fencing options (e.g., bushes): 7% - 17% (10% increase)
- Lot size: 2018 2019 (-33% -28%)

Source: The American Institute of Architects Home Design Trends Survey
FIGURE 7  Project billings and inquiries see bounce in Q1 at residential firms
Diffusion index: 50 = no change from previous quarter; data is seasonally adjusted

Source: The American Institute of Architects Home Design Trends Survey
FIGURE 8  Project backlogs increase in the first quarter

Number of months of project backlogs, averages across all firms; data are not seasonally adjusted

Source: The American Institute of Architects Home Design Trends Survey
Strong spike in billings at firms in the Northeast and Midwest, while billings in the West bounce back

Diffusion index for billings: 50 = no change from previous quarter; data is seasonally adjusted

Source: The American Institute of Architects Home Design Trends Survey
First time buyer and second/vacation homes report weakness while all other sectors report slower growth

% of respondents reporting sector “improving” minus % reporting “weakening”; data from Q1 2019 compared to data from Q1 2018

- Remodeling: additions/alterations
  - 2019: 46%
  - 2018: 52%

- Remodeling: kitchen/bath
  - 2019: 40%
  - 2018: 46%

- First-time buyer/affordable homes
  - 2019: -13%
  - 2018: 14%

- Move-up homes
  - 2019: 2%
  - 2018: 26%

- Custom/luxury homes
  - 2019: 6%
  - 2018: 24%

- Townhouse/condo
  - 2019: 12%
  - 2018: 19%

- Second/vacation homes
  - 2019: -13%
  - 2018: 4%

Source: The American Institute of Architects Home Design Trends Survey