FIGURE 1  Overall size of homes continues to soften

% of respondents reporting “increasing” minus % reporting “decreasing”; data from Q1 2016-2020

Source: The American Institute of Architects Home Design Trends Survey
% of respondents indicating that square footage of homes in category is “increasing” minus % reporting “decreasing”; data from Q1 2020

**FIGURE 2** Easing in home sizes continues in entry-level homes while upper-end homes seem to stabilize

Source: The American Institute of Architects Home Design Trends Survey
Rental units/accessory dwellings remain popular while finished basement/attic and micro housing options decrease

% of firms reporting “increasing” minus % reporting “decreasing”; data from Q1 2020 compared to data from Q1 2019

Source: The American Institute of Architects Home Design Trends Survey
FIGURE 4  Accessibility and overall designs for aging in place top the list of popular home layout designs

% of firms reporting “increasing” minus % reporting “decreasing”; data from Q1 2020 compared to data from Q1 2019

- Overall designs for aging in place*
- Easier accessibility within home
- Easier accessibility into and out of home
- Informal Space
- Single-floor design
- Open space layout/flexible floor plans

*Overall designs for aging in place not asked in 2019
Source: The American Institute of Architects Home Design Trends Survey
Emphasis on outdoors and outdoor living spaces continue to remain popular but showed an easing in popularity

% of firms reporting “increasing” minus % reporting “decreasing”; data from Q1 2020 compared to data from Q1 2019

Source: The American Institute of Architects Home Design Trends Survey
Properties that pose design and lot preparation challenges continue to be popular

% of firms reporting “increasing” minus % reporting “decreasing”; data from Q1 2020 compared to data from Q1 2019

Source: The American Institute of Architects Home Design Trends Survey
Project billings, inquiries, and design contracts see record decline in one quarter due to COVID-19

Diffusion index: 50 = no change from previous quarter; data are seasonally adjusted; data from Q1 2015–Q1 2020

Source: The American Institute of Architects Home Design Trends Survey
FIGURE 8  On average firms estimate they will experience a 14% decrease in revenue in the second quarter of 2020

% of respondents projecting estimated revenue changes for the second quarter of 2020; data from Q1 2020

<table>
<thead>
<tr>
<th>Regional estimated revenue changes for Q2 2020</th>
<th>National 32%; Loss of 25% or more</th>
<th>15%; No change</th>
<th>3%; Increase in revenue</th>
<th>17%; Loss of under 5%</th>
<th>12%; Loss of at least 5% but under 10%</th>
<th>22%; Loss of at least 10% but under 25%</th>
</tr>
</thead>
<tbody>
<tr>
<td>-14% National</td>
<td>32%</td>
<td>15%</td>
<td>3%</td>
<td>17%</td>
<td>12%</td>
<td>22%</td>
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<td>-15% West</td>
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</tbody>
</table>

Source: The American Institute of Architects Home Design Trends Survey
Project backlogs decrease in the first quarter due to COVID-19

Number of months of project backlogs, averages across all firms; data are not seasonally adjusted; data from Q1 2015-Q1 2020

FIGURE 9

Source: The American Institute of Architects Home Design Trends Survey
On average firms reported a 10% decrease in the value of backlogs from the fourth quarter of 2019 to the first quarter of 2020. % of respondents estimated change in the value of backlogs in Q1 2020 from Q4 2019; data from Q1 2020.

Source: The American Institute of Architects Home Design Trends Survey
All regions report declines in billings for the first quarter due to COVID-19

Diffusion index for billings: 50 = no change from previous quarter; data is seasonally adjusted; data from Q1 2015–Q1 2020

Source: The American Institute of Architects Home Design Trends Survey
All sectors saw declines with the affordable homes and second homes seeing the greatest weakness

% of respondents reporting sector “improving” minus % reporting “weakening”; data from Q1 2020 compared to data from Q1 2019

Source: The American Institute of Architects Home Design Trends Survey