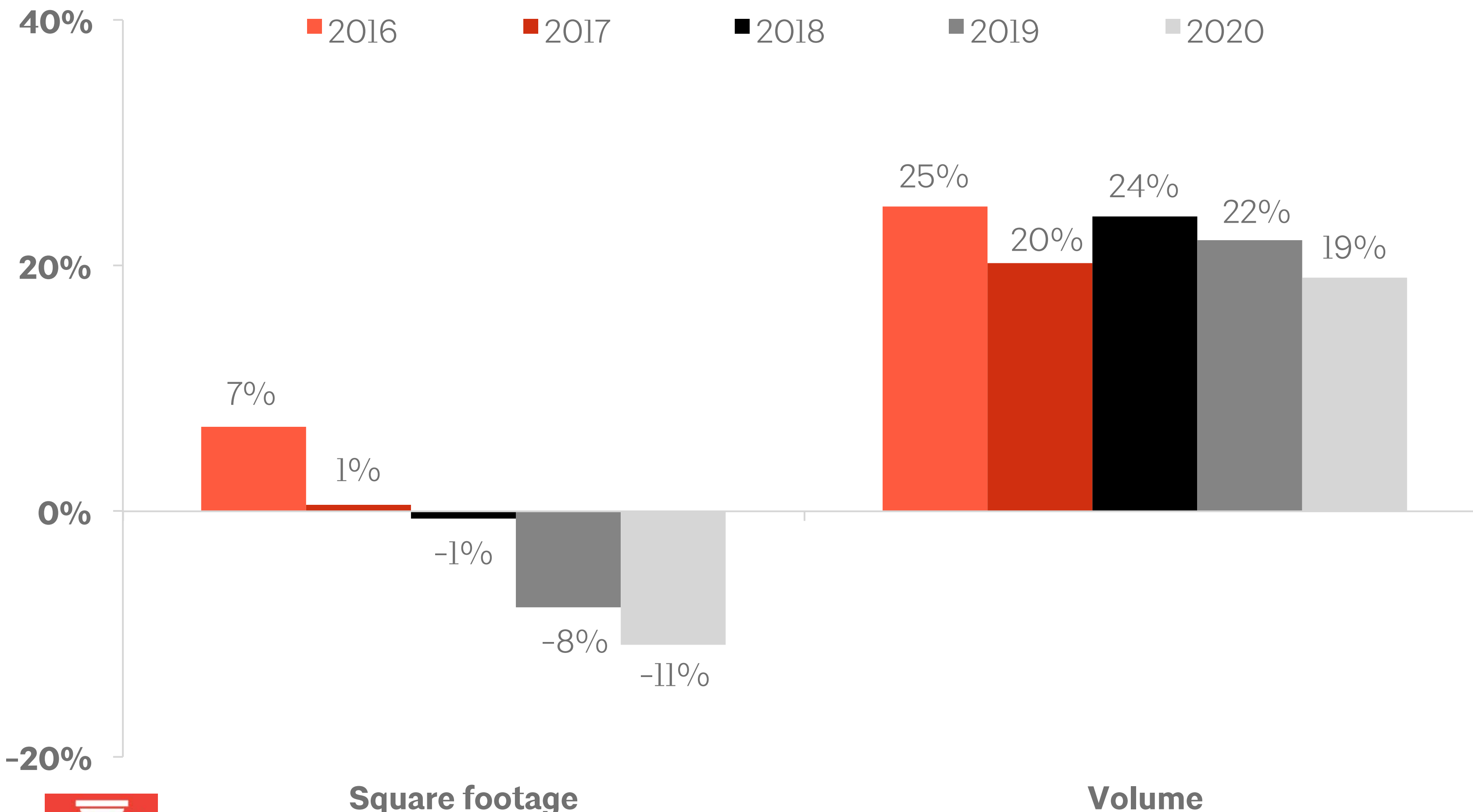
FIGURE 1 Overall size of homes continues to soften

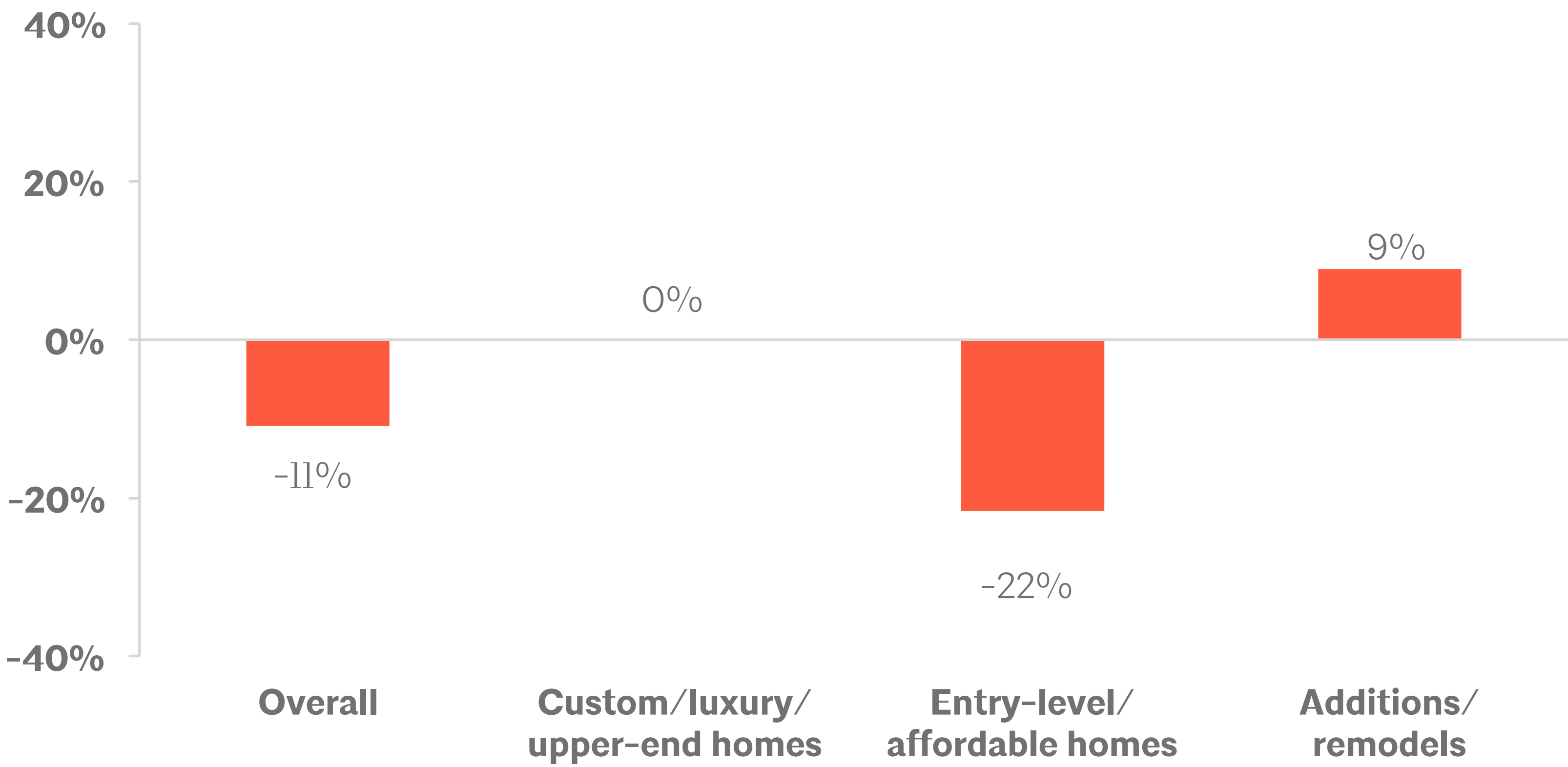
% of respondents reporting “increasing” minus % reporting “decreasing”; data from Q1 2016-2020



Source: The American Institute of Architects Home Design Trends Survey

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

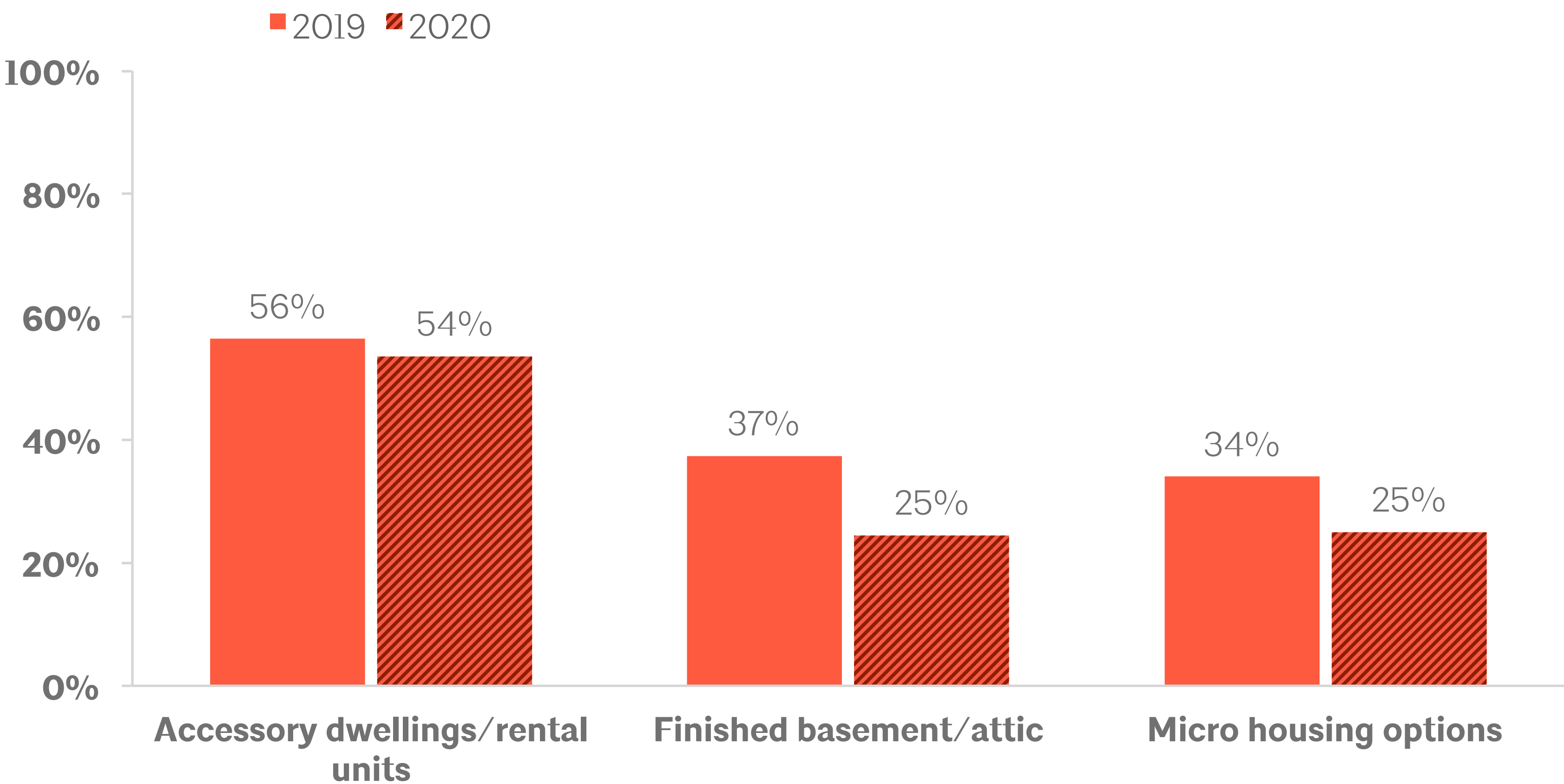
% of respondents indicating that square footage of homes in category is "increasing" minus % reporting "decreasing"; data from Q1 2020



Source: The American Institute of Architects Home Design Trends Survey

FIGURE 3 Rental units/accessory dwellings remain popular while finished basement/attic and micro housing options decrease

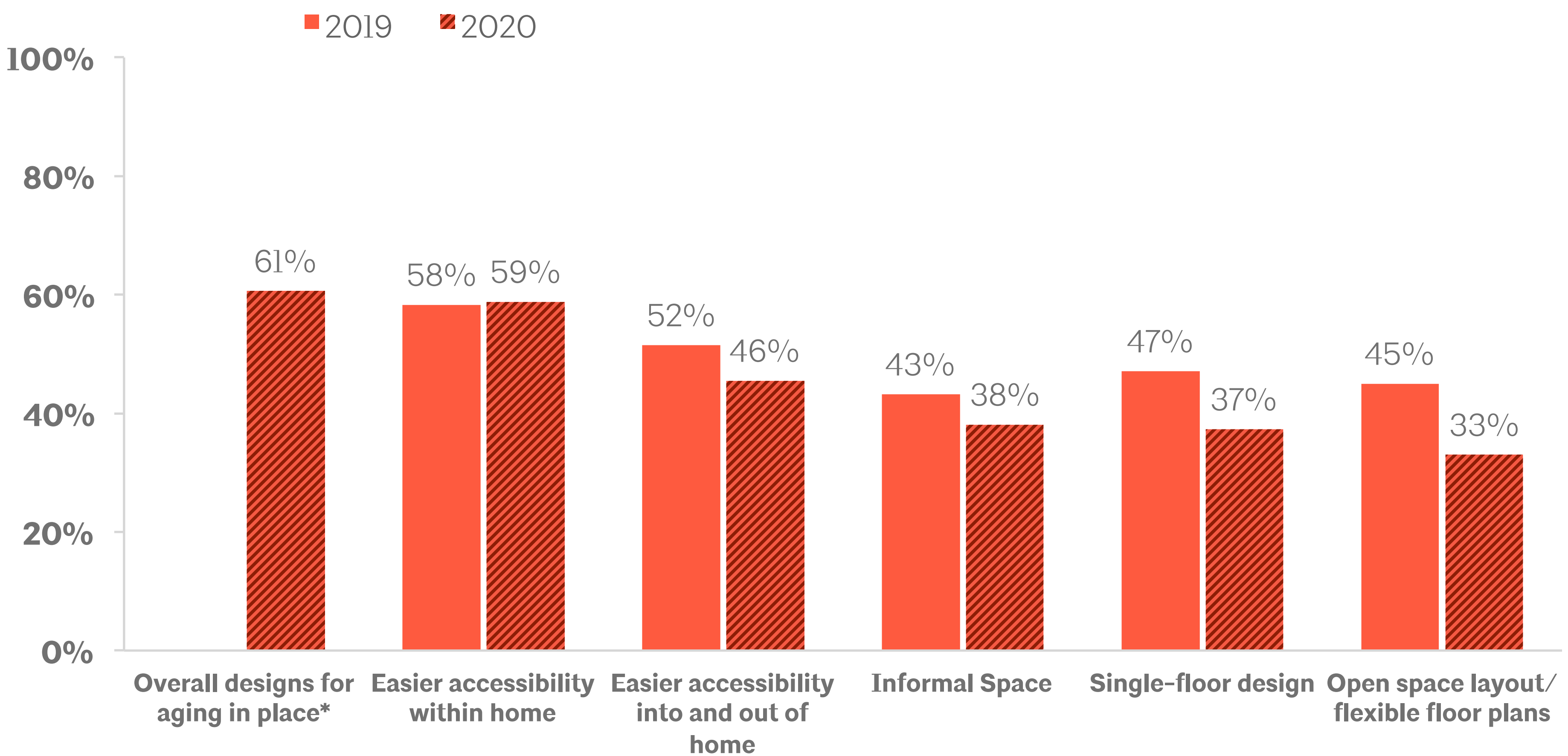
% of firms reporting "increasing" minus % reporting "decreasing"; data from Q1 2020 compared to data from Q1 2019



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

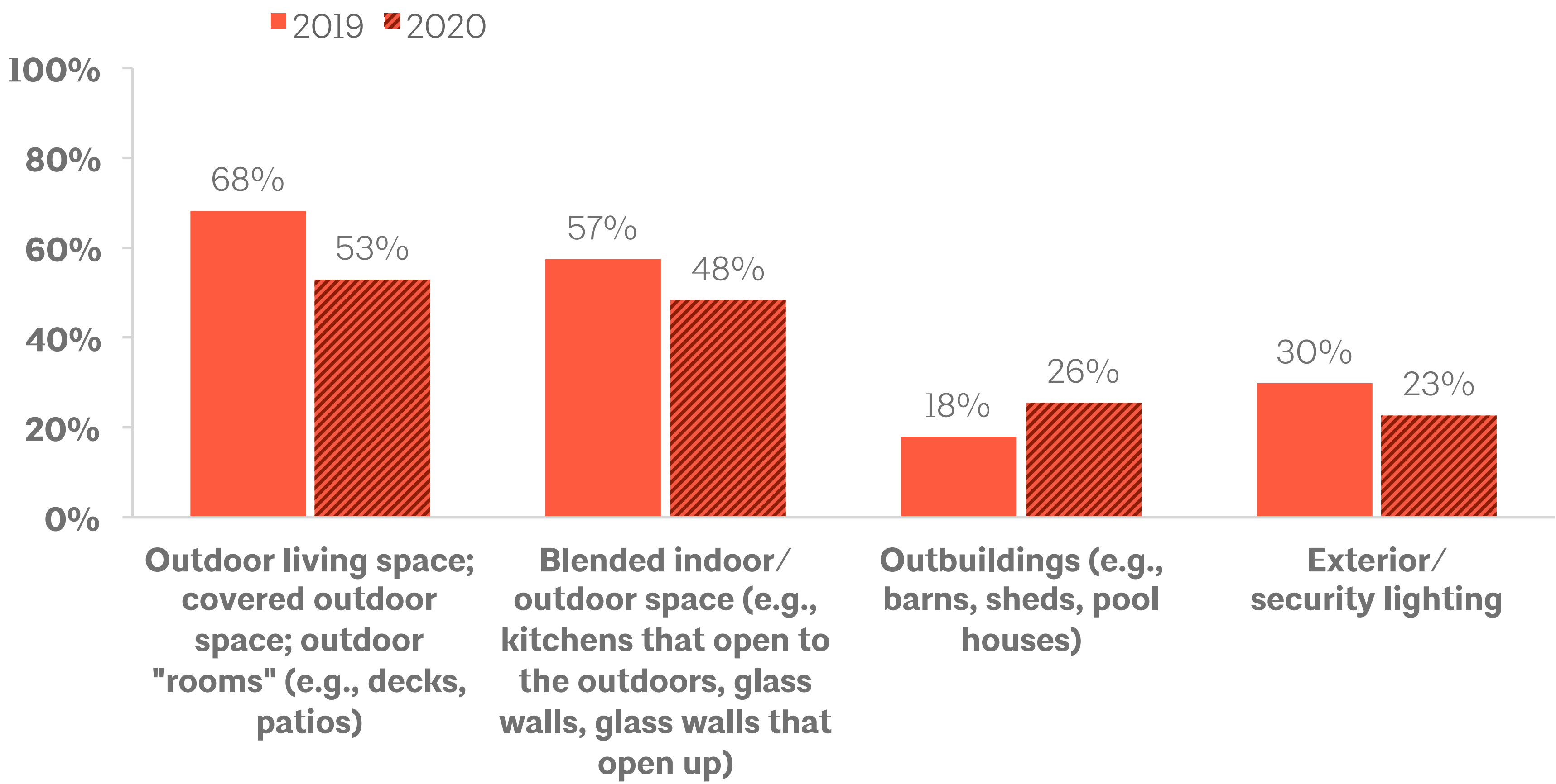
% of firms reporting “increasing” minus % reporting “decreasing”; data from Q1 2020 compared to data from Q1 2019



*Overall designs for aging in place not asked in 2019
Source: The American Institute of Architects Home Design Trends Survey

FIGURE 5 **Emphasis on outdoors and outdoor living spaces continue to remain popular but showed an easing in popularity**

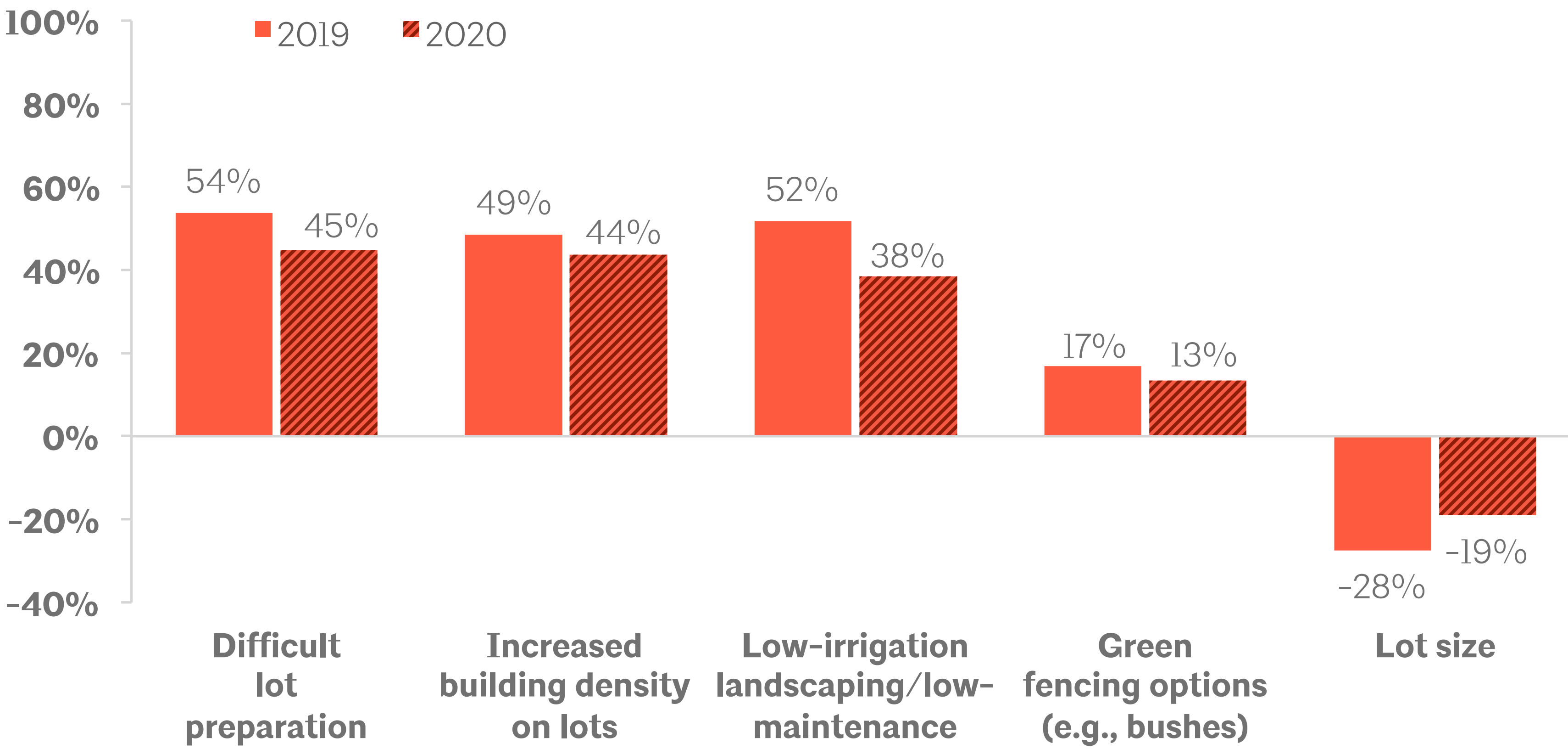
% of firms reporting "increasing" minus % reporting "decreasing"; data from Q1 2020 compared to data from Q1 2019



Source: The American Institute of Architects Home Design Trends Survey

FIGURE 6 Properties that pose design and lot preparation challenges continue to be popular

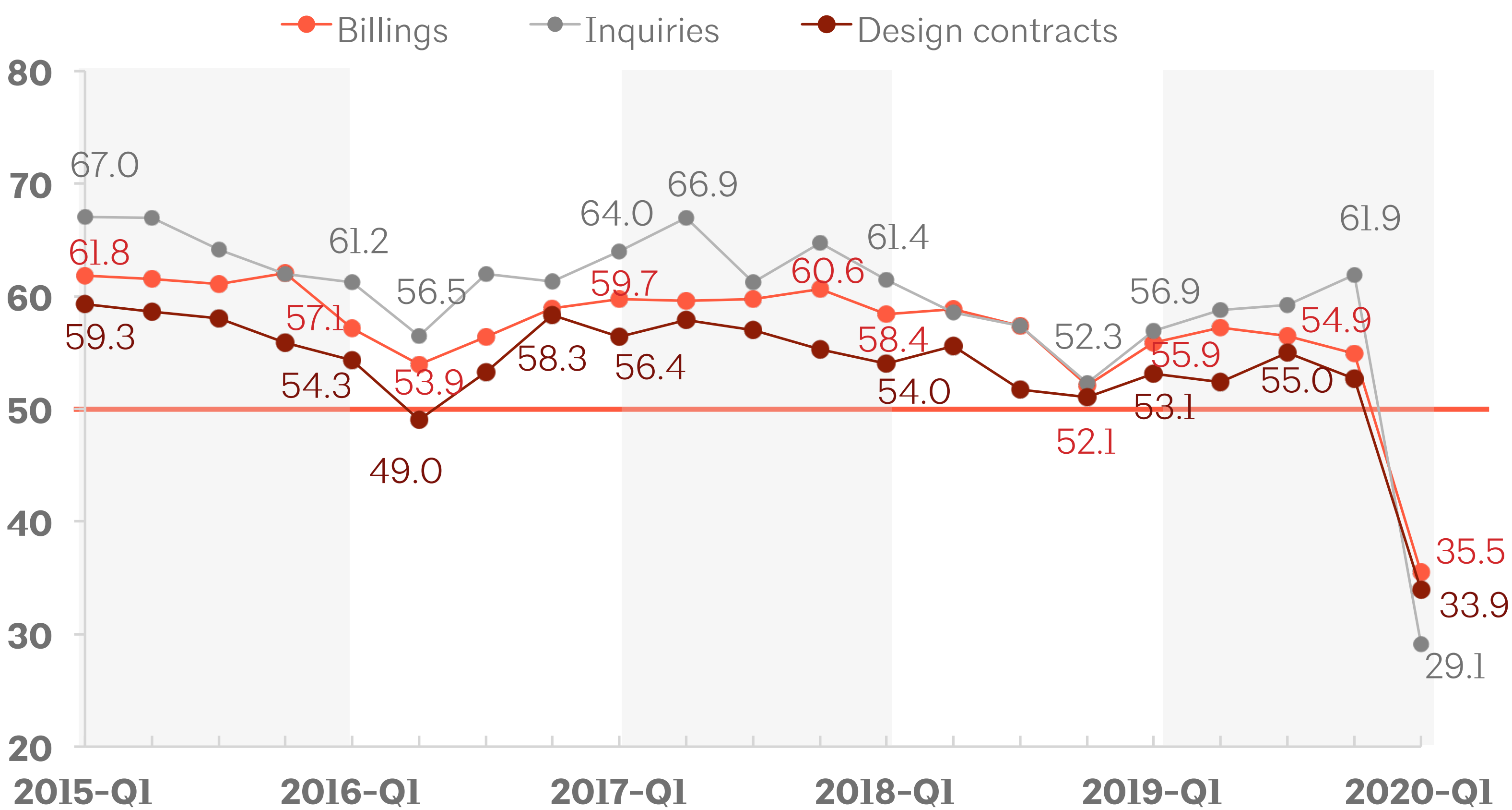
% of firms reporting “increasing” minus % reporting “decreasing”; data from Q1 2020 compared to data from Q1 2019



Source: The American Institute of Architects Home Design Trends Survey

FIGURE 7 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

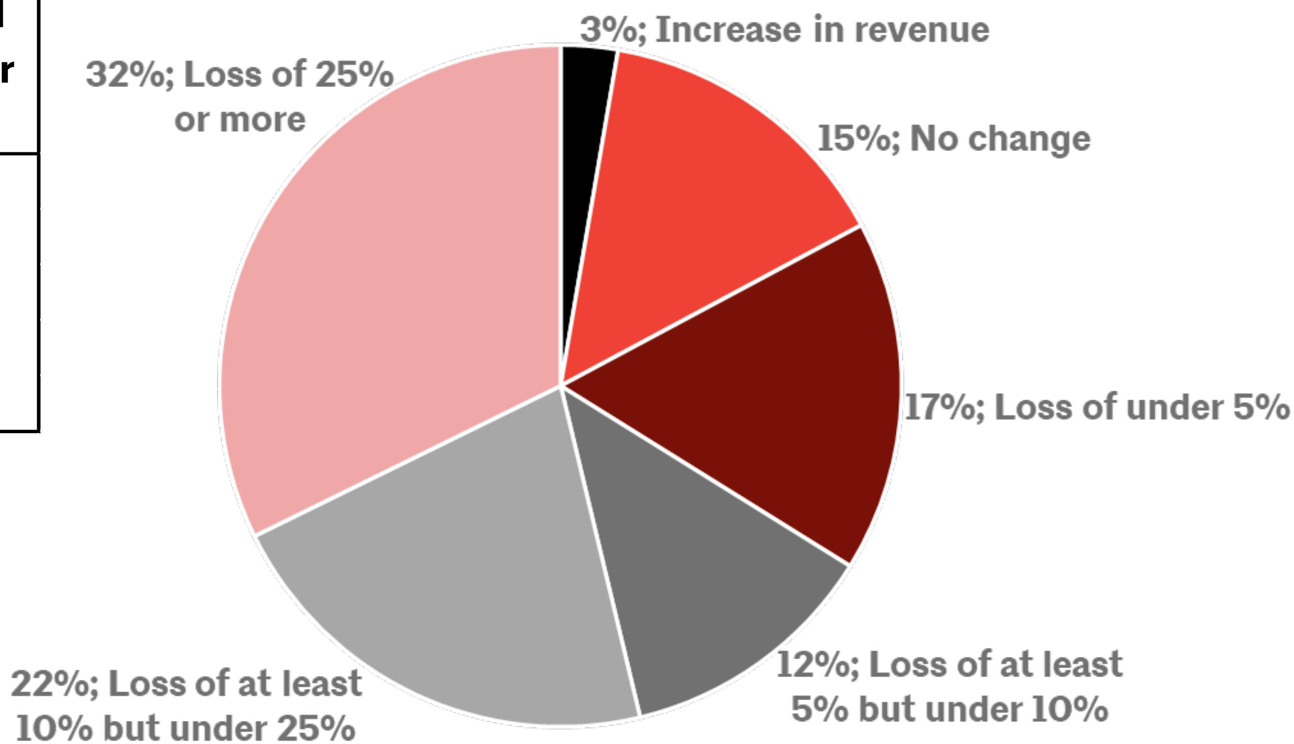
FIGURE 8

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

Regional estimated revenue changes for Q2 2020	
-14%	National
-19%	Northeast
-15%	Midwest
-10%	South
-15%	West

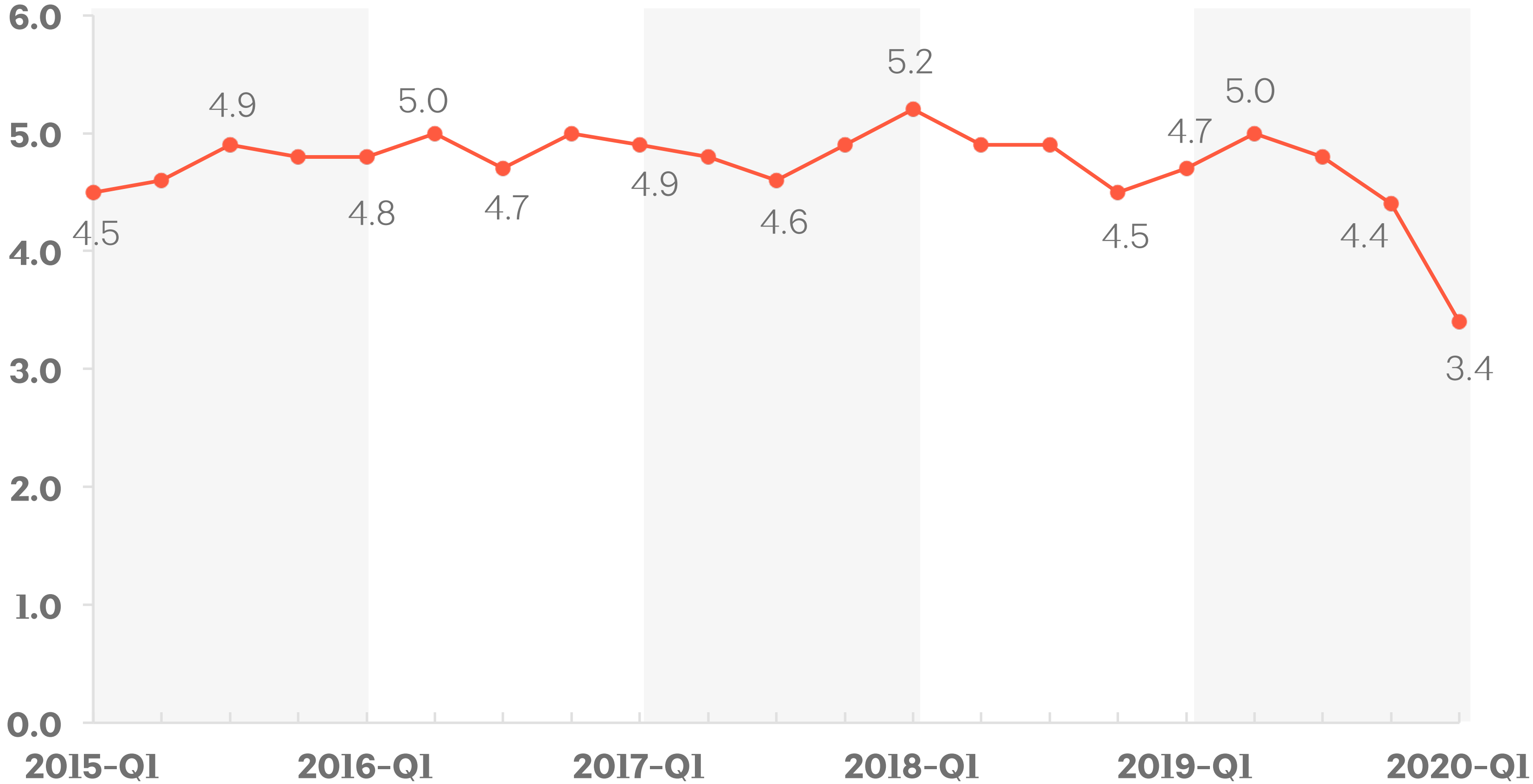
National



Source: The American Institute of Architects Home Design Trends Survey

FIGURE 9 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

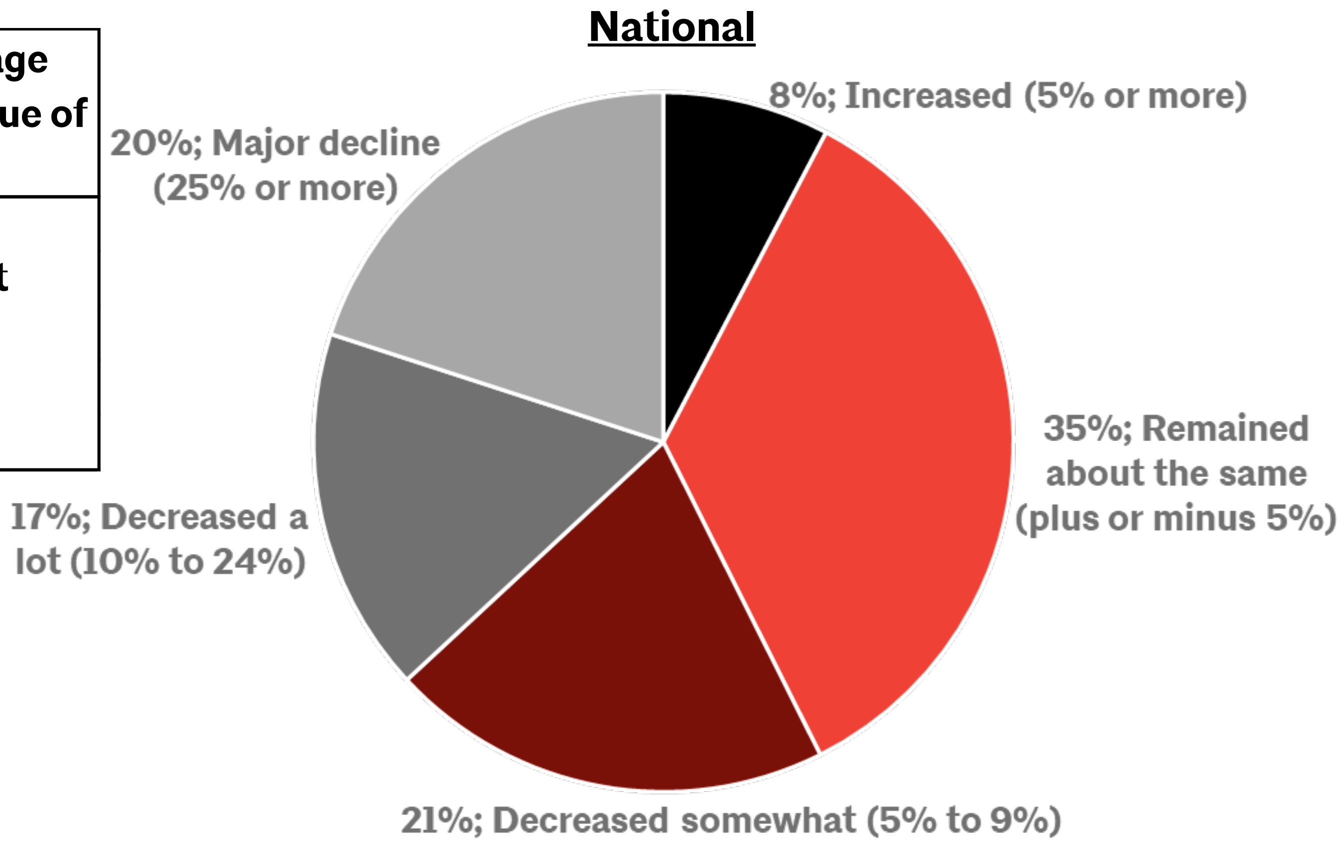


Source: The American Institute of Architects Home Design Trends Survey

FIGURE 10 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

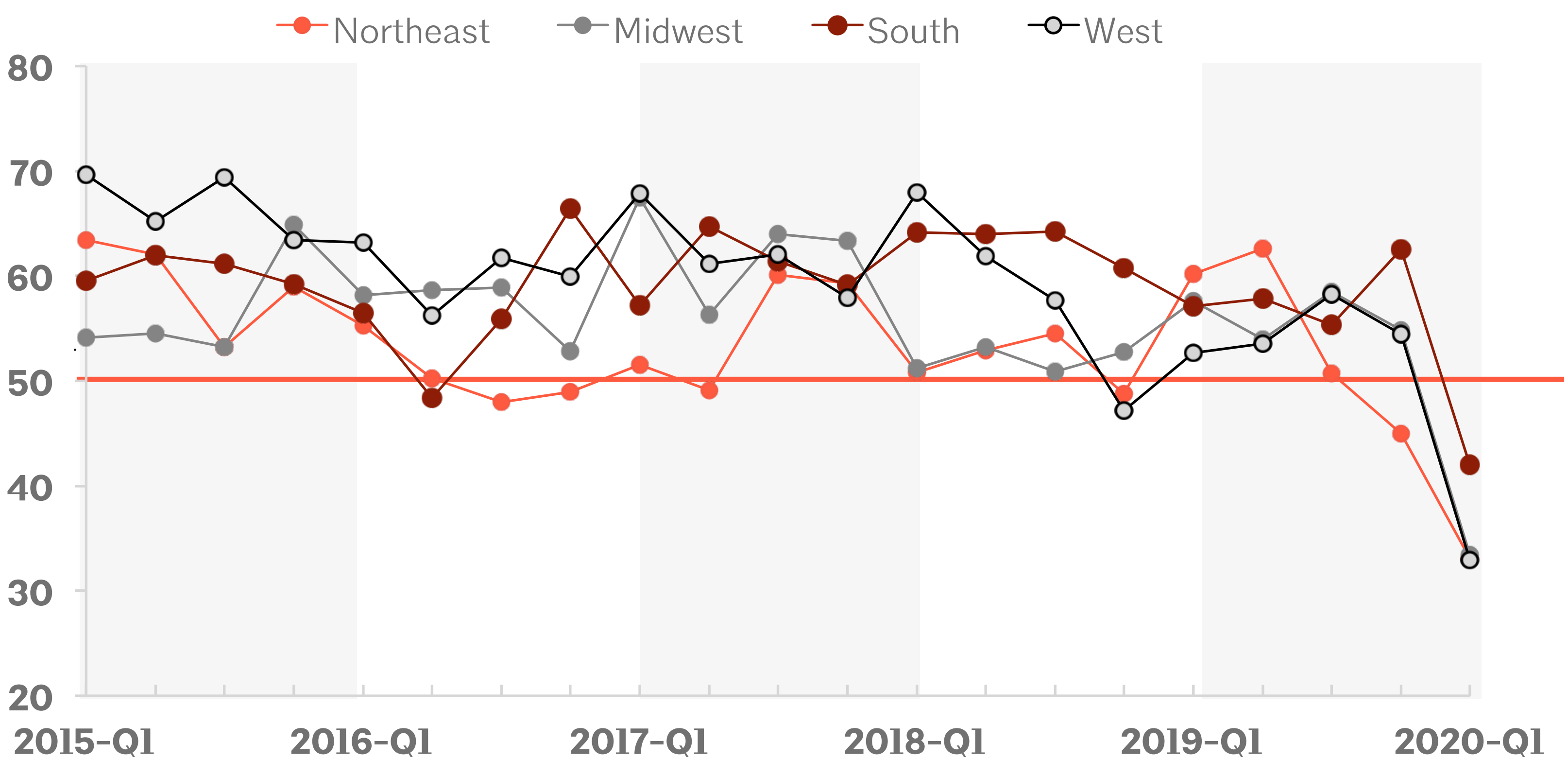
Regional average change in the value of backlogs	
-10%	National
-13%	Northeast
-10%	Midwest
-6%	South
-10%	West



Source: The American Institute of Architects Home Design Trends Survey

FIGURE 11 All regions report declines in billings for the first quarter due to COVID-19

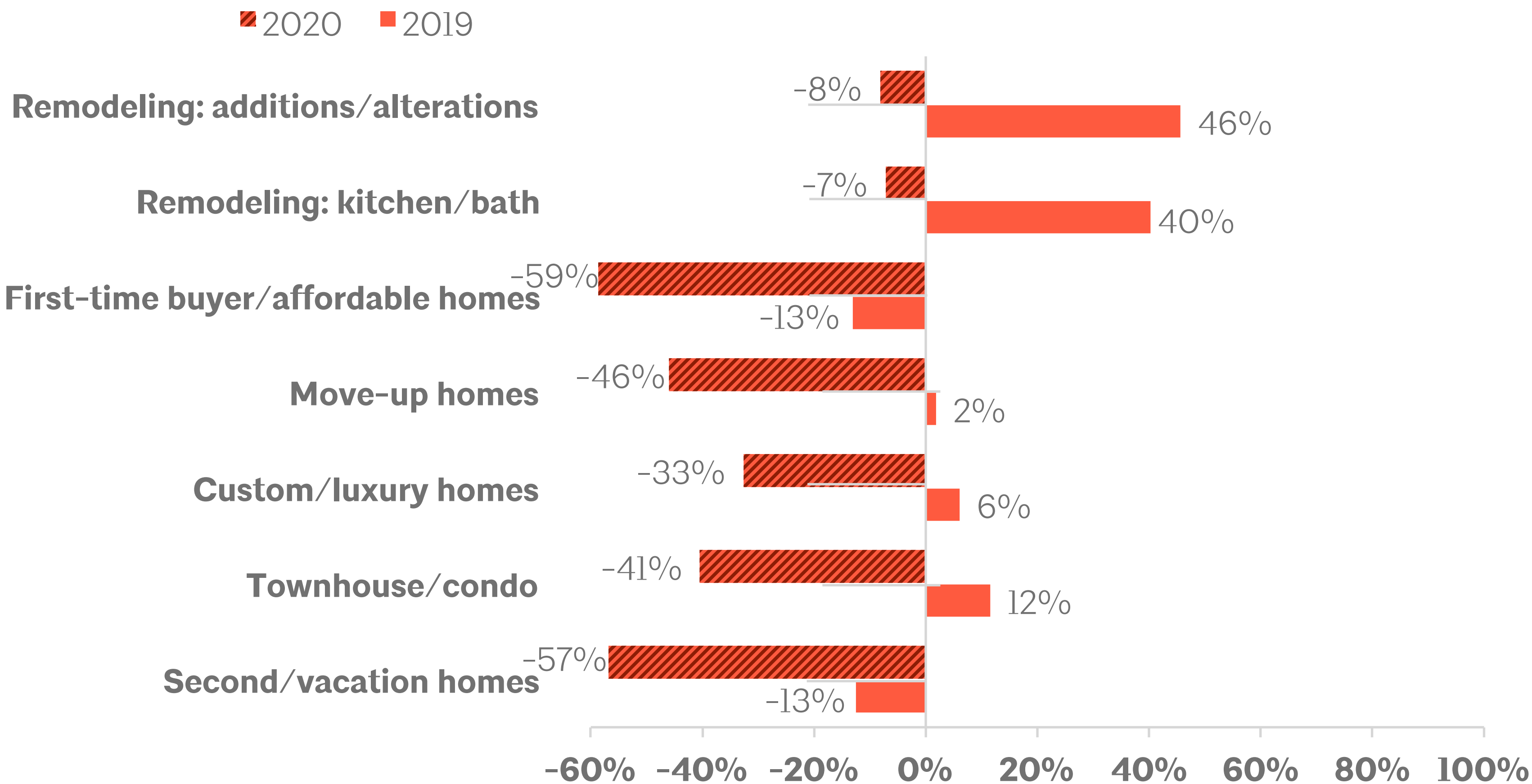
Diffusion index for billings: 50 = no change from previous quarter; data is seasonally adjusted; data from Q1 2015-Q1 2020



Source: The American Institute of Architects Home Design Trends Survey

FIGURE 12 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