HOUZZ RESEARCH

2025Q3 U.S. Houzz Renovation Barometer

Architectural & Design

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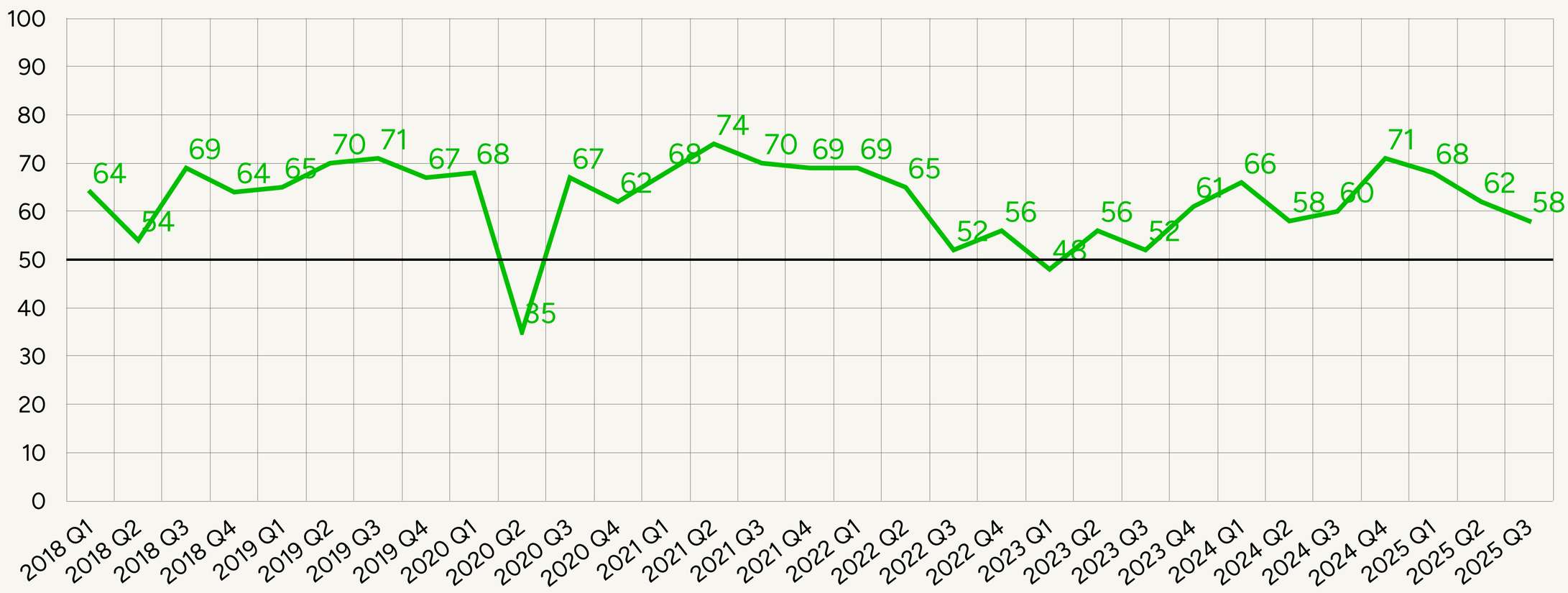
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Expected Business Activity Indicator

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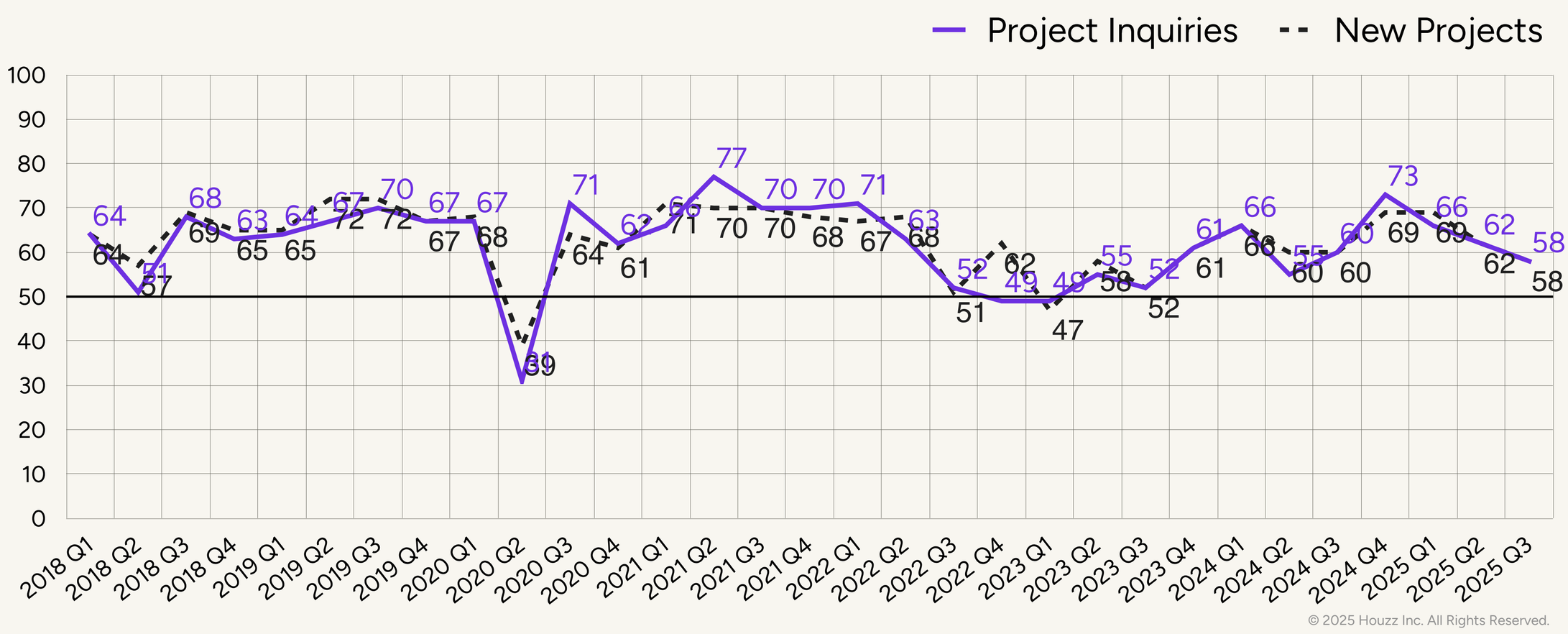
Expected Business Activity Indicator

FIGURE 1: EXPECTED BUSINESS ACTIVITY INDICATOR - NATIONAL



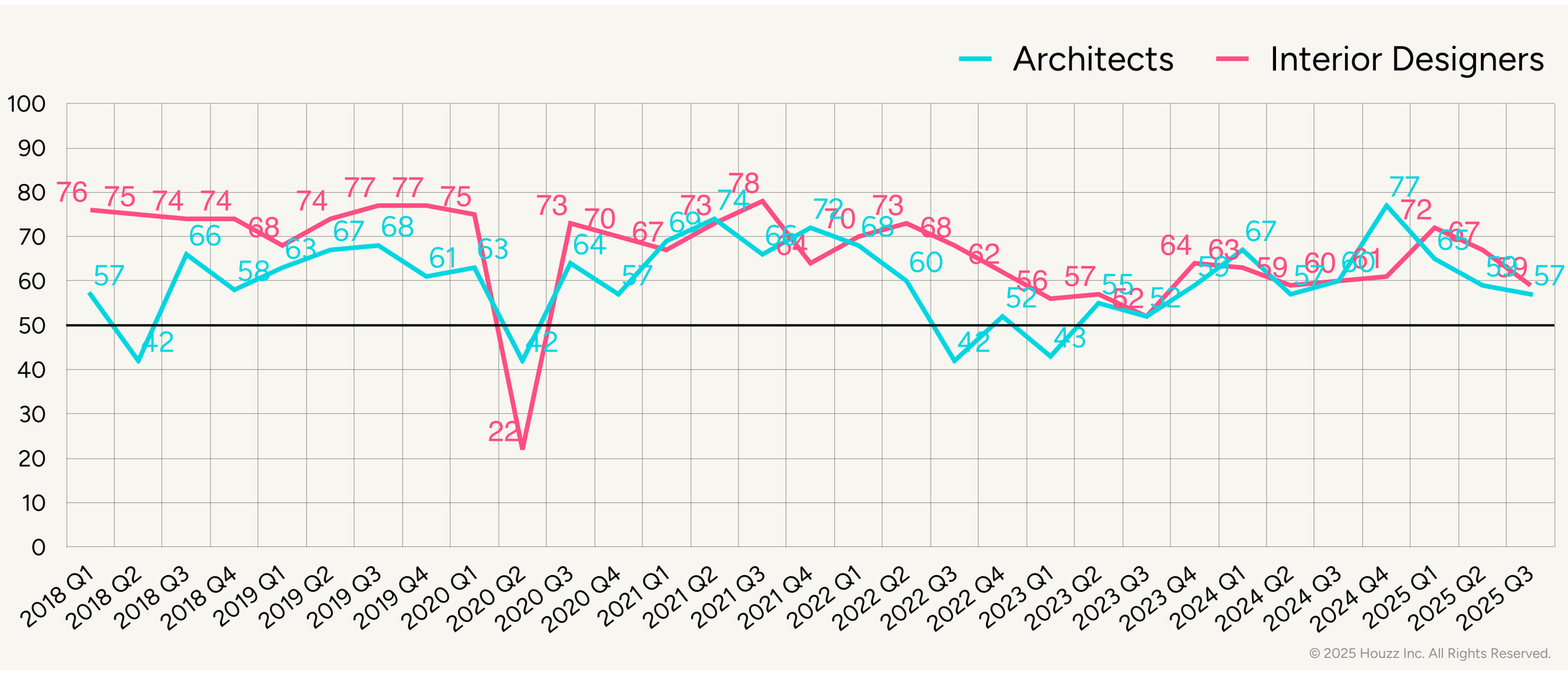
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FIGURE 2: EXPECTED BUSINESS ACTIVITY INDICATOR - COMPONENTS



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FIGURE 3: EXPECTED BUSINESS ACTIVITY INDICATOR – SUBSECTORS



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Expected Business Activity Indicator

TABLE 1: NATIONAL

Quarter	Overall	Project Inquiries	New Projects
2018 Q1	64	64	64
2018 Q2	54	51	57
2018 Q3	69	68	69
2018 Q4	64	63	65
2019 Q1	65	64	65
2019 Q2	70	67	72
2019 Q3	71	70	72
2019 Q4	67	67	67
2020 Q1	68	67	68
2020 Q2	35	31	39
2020 Q3	67	71	64
2020 Q4	62	62	61
2021 Q1	68	66	71
2021 Q2	74	77	70
2021 Q3	70	70	70
2021 Q4	69	70	68
2022 Q1	69	71	67
2022 Q2	65	63	68
2022 Q3	52	52	51
2022 Q4	56	49	62
2023 Q1	48	49	47
2023 Q2	56	55	58
2023 Q3	52	52	52
2023 Q4	61	61	61
2024 Q1	66	66	66
2024 Q2	58	55	60
2024 Q3	60	60	60
2024 Q4	71	73	69
2025 Q1	68	66	69
2025 Q2	62	62	62
2025 Q3	58	58	58

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Expected Business Activity Indicator

TABLE 2: ARCHITECTS

Quarter	Overall	Project Inquiries	New Projects
2018 Q1	57	57	58
2018 Q2	42	37	47
2018 Q3	66	65	66
2018 Q4	58	56	59
2019 Q1	63	62	64
2019 Q2	67	64	70
2019 Q3	68	66	69
2019 Q4	61	61	61
2020 Q1	63	62	64
2020 Q2	42	38	46
2020 Q3	64	69	59
2020 Q4	57	56	57
2021 Q1	69	66	73
2021 Q2	74	80	68
2021 Q3	66	66	66
2021 Q4	72	74	70
2022 Q1	68	70	65
2022 Q2	60	58	63
2022 Q3	42	44	40
2022 Q4	52	44	60
2023 Q1	43	45	41
2023 Q2	55	54	57
2023 Q3	52	54	51
2023 Q4	59	60	58
2024 Q1	67	68	67
2024 Q2	57	54	60
2024 Q3	60	60	60
2024 Q4	77	80	73
2025 Q1	65	63	66
2025 Q2	59	59	58
2025 Q3	57	59	55

TABLE 3: INTERIOR DESIGNERS

Quarter	Overall	Project Inquiries	New Projects
2018 Q1	76	77	75
2018 Q2	75	75	74
2018 Q3	74	74	75
2018 Q4	74	73	75
2019 Q1	68	68	68
2019 Q2	74	73	74
2019 Q3	77	77	76
2019 Q4	77	76	77
2020 Q1	75	75	76
2020 Q2	22	19	26
2020 Q3	73	74	73
2020 Q4	70	72	68
2021 Q1	67	67	68
2021 Q2	73	73	73
2021 Q3	78	78	78
2021 Q4	64	64	64
2022 Q1	70	72	69
2022 Q2	73	71	75
2022 Q3	68	66	70
2022 Q4	62	59	65
2023 Q1	56	56	57
2023 Q2	57	56	59
2023 Q3	52	50	54
2023 Q4	64	63	65
2024 Q1	63	63	63
2024 Q2	59	58	61
2024 Q3	60	59	61
2024 Q4	61	61	62
2025 Q1	72	71	74
2025 Q2	67	66	68
2025 Q3	59	56	62

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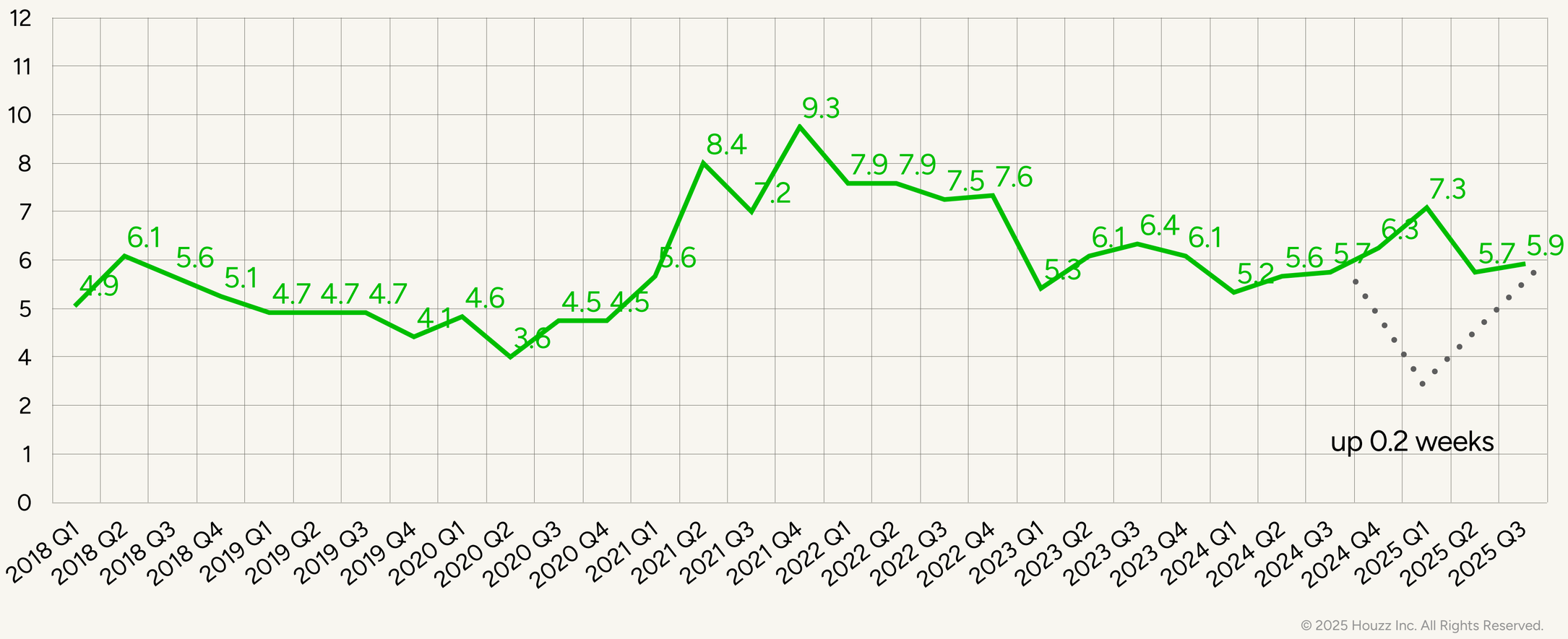
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Project Backlog Indicator

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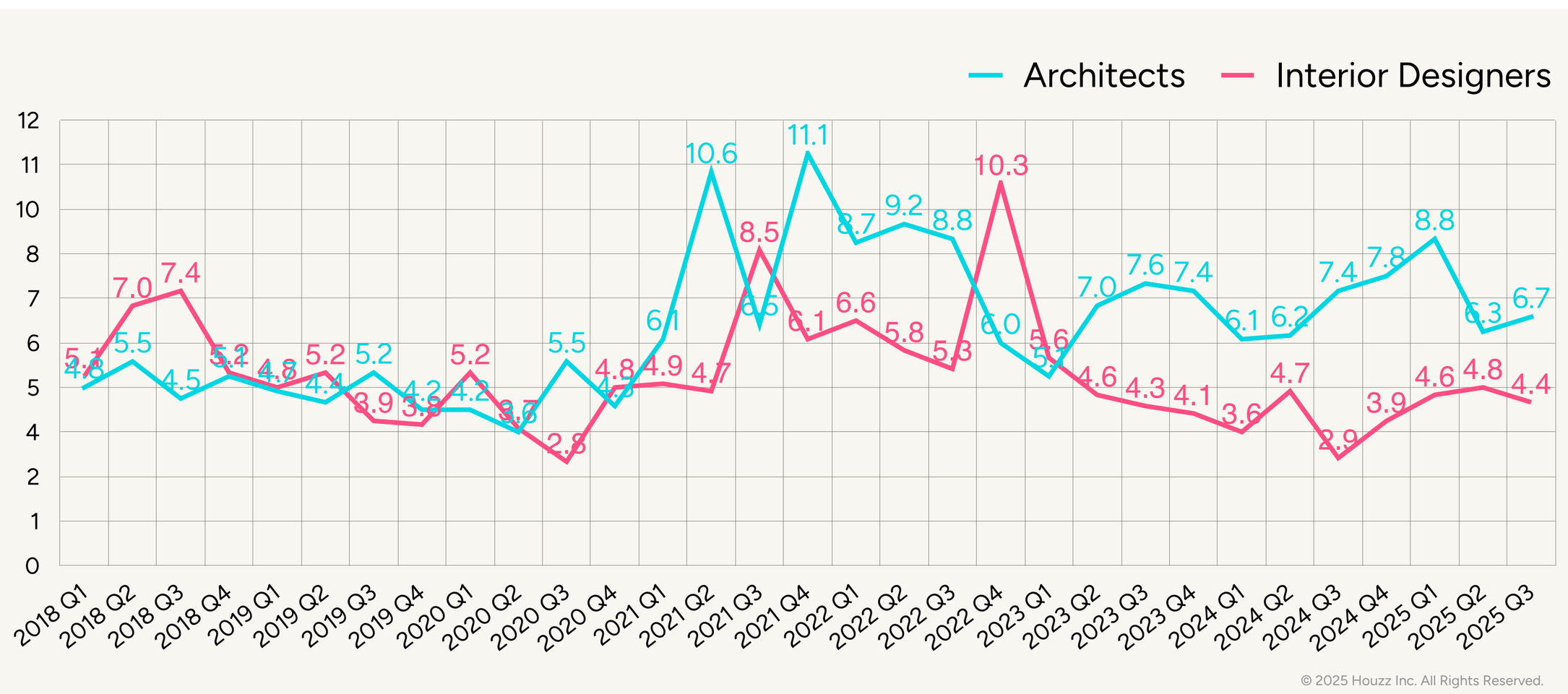
Project Backlog Indicator

FIGURE 1: PROJECT BACKLOG INDICATOR - NATIONAL



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FIGURE 2: PROJECT BACKLOG INDICATOR – SUBSECTORS



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Project Backlog Indicator

TABLE 1: NATIONAL

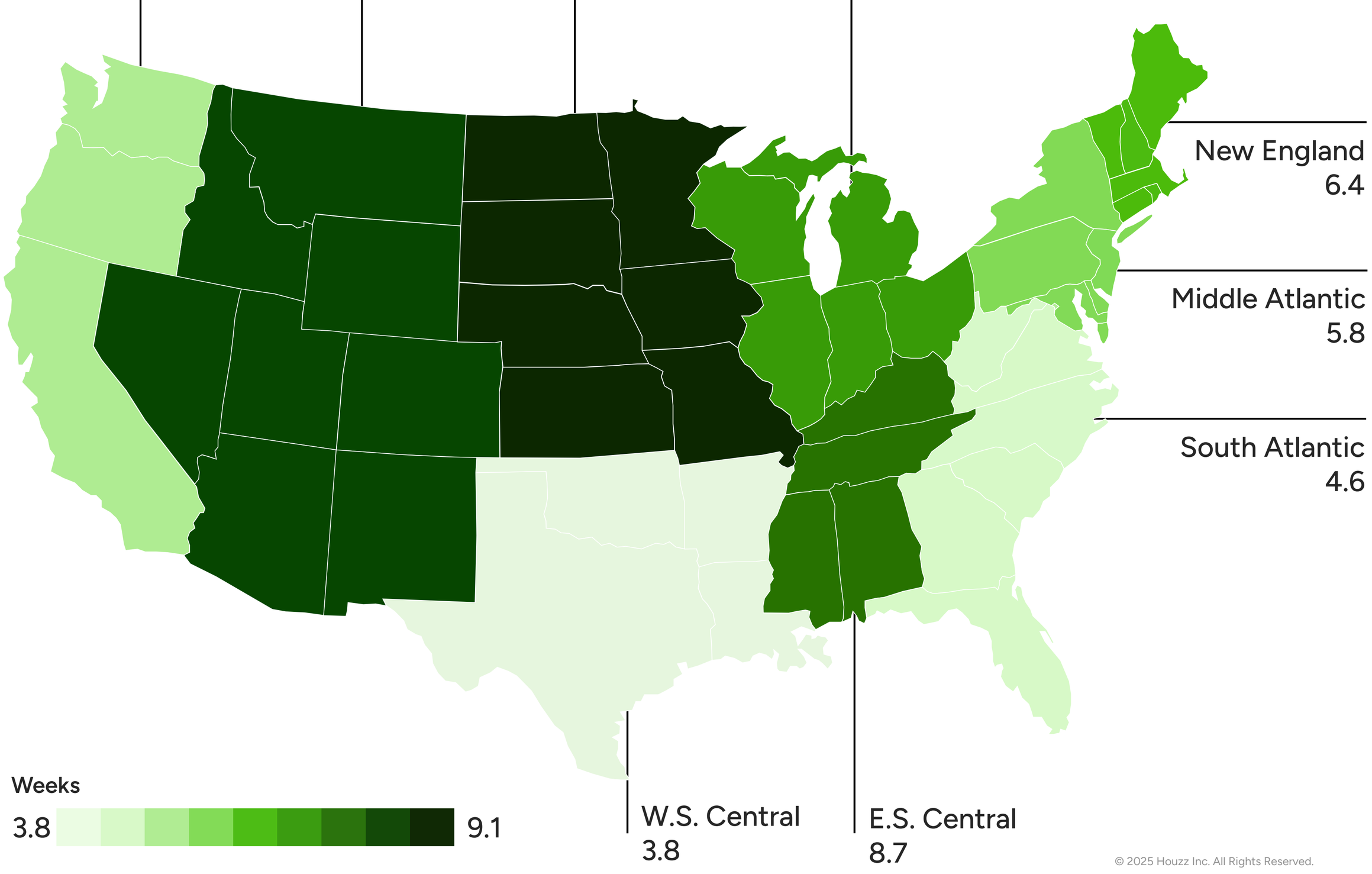
Quarter	Overall	Architects	Interior Designers
2018 Q1	4.9	4.8	5.1
2018 Q2	6.1	5.5	7.0
2018 Q3	5.6	4.5	7.4
2018 Q4	5.1	5.1	5.2
2019 Q1	4.7	4.7	4.8
2019 Q2	4.7	4.4	5.2
2019 Q3	4.7	5.2	3.9
2019 Q4	4.1	4.2	3.8
2020 Q1	4.6	4.2	5.2
2020 Q2	3.6	3.6	3.7
2020 Q3	4.5	5.5	2.8
2020 Q4	4.5	4.3	4.8
2021 Q1	5.6	6.1	4.9
2021 Q2	8.4	10.6	4.7
2021 Q3	7.2	6.5	8.5
2021 Q4	9.3	11.1	6.1
2022 Q1	7.9	8.7	6.6
2022 Q2	7.9	9.2	5.8
2022 Q3	7.5	8.8	5.3
2022 Q4	7.6	6.0	10.3
2023 Q1	5.3	5.1	5.6
2023 Q2	6.1	7.0	4.6
2023 Q3	6.4	7.6	4.3
2023 Q4	6.1	7.4	4.1
2024 Q1	5.2	6.1	3.6
2024 Q2	5.6	6.2	4.7
2024 Q3	5.7	7.4	2.9
2024 Q4	6.3	7.8	3.9
2025 Q1	7.3	8.8	4.6
2025 Q2	5.7	6.3	4.8
2025 Q3	5.9	6.7	4.4

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Project Backlog Indicator

Figure 3: Overall Backlog, by U.S. Census Regional Division (in weeks)



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Project Backlog Indicator

TABLE 2: ALL GROUPS, BY U.S. CENSUS REGIONAL DIVISIONS

Quarter	East North Central Division	East South Central Division	Middle Atlantic Division	Mountain Division	New England Division	Pacific Division	South Atlantic Division	West North Central Division	West South Central Division
2018 Q1	4.4	3.7	5.2	4.8	5.2	6.1	4.1	3.8	5.1
2018 Q2	5.6	5.9	5.4	6.7	6.0	7.1	6.0	5.7	5.6
2018 Q3	5.2	5.1	5.4	5.6	5.0	6.8	5.3	5.4	5.2
2018 Q4	5.0	5.0	5.2	5.3	5.2	5.3	4.8	5.0	5.3
2019 Q1	4.8	4.6	4.6	5.1	5.1	4.8	4.6	4.7	4.7
2019 Q2	4.2	4.6	4.7	4.6	4.5	5.3	4.6	4.3	4.6
2019 Q3	4.2	4.2	5.3	5.3	4.2	4.8	4.7	4.0	4.4
2019 Q4	4.0	4.4	4.0	4.2	3.8	4.4	3.9	3.6	4.0
2020 Q1	4.9	4.9	4.4	5.8	4.5	4.6	4.0	4.4	4.4
2020 Q2	4.0	3.6	3.7	3.8	3.5	3.5	3.5	3.3	3.5
2020 Q3	4.5	4.6	4.5	4.9	4.0	4.4	4.3	4.5	4.7
2020 Q4	5.0	3.7	4.7	4.9	4.0	5.0	4.1	3.4	4.3
2021 Q1	5.7	4.6	6.2	6.6	4.0	6.2	5.3	3.3	5.6
2021 Q2	8.9	8.8	8.7	9.0	7.9	7.7	8.5	9.0	7.9
2021 Q3	7.1	5.6	9.1	6.6	6.6	7.7	6.6	5.8	6.8
2021 Q4	8.3	7.7	10.8	10.1	11.1	9.8	8.7	6.1	8.1
2022 Q1	10.0	4.7	8.4	8.6	6.1	9.0	6.6	6.0	7.4
2022 Q2	9.0	6.7	9.9	8.0	6.8	7.7	6.9	6.2	7.9
2022 Q3	10.4	6.3	8.2	7.6	7.5	7.0	6.5	6.5	6.8
2022 Q4	8.6	7.0	8.2	6.7	8.3	7.3	6.8	6.1	9.0
2023 Q1	5.3	5.0	6.7	5.2	4.4	5.5	4.9	3.5	4.8
2023 Q2	6.8	8.4	6.7	5.5	5.5	6.2	5.8	4.6	5.7
2023 Q3	7.7	9.2	8.2	4.6	5.2	4.4	8.0	2.5	6.1
2023 Q4	5.8	4.9	8.3	5.3	5.2	5.8	7.1	4.9	4.4
2024 Q1	6.6	4.4	8.1	4.7	5.0	4.1	4.3	4.9	3.9
2024 Q2	5.3	2.8	9.3	4.8	5.8	5.2	5.3	4.2	3.7
2024 Q3	5.9	8.4	5.8	3.3	8.1	3.5	6.0	9.4	8.1
2024 Q4	6.3	5.9	9.9	6.7	6.4	4.7	5.9	6.6	4.4
2025 Q1	6.7	8.4	7.0	8.0	7.6	7.6	7.6	3.1	7.9
2025 Q2	6.1	6.5	6.1	4.3	5.7	6.1	5.5	6.3	5.6
2025 Q3	6.7	8.7	5.8	9.0	6.4	4.9	4.6	9.1	3.8

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Project Backlog Indicator

TABLE 3: ARCHITECTS, BY U.S. CENSUS REGIONAL DIVISIONS

Quarter	East North Central Division	East South Central Division	Middle Atlantic Division	Mountain Division	New England Division	Pacific Division	South Atlantic Division	West North Central Division	West South Central Division
2018 Q1	4.2	2.5	5.7	4.1	5.1	6.8	3.4	2.5	4.8
2018 Q2	4.9	4.7	5.2	6.2	4.9	6.7	5.4	4.6	4.9
2018 Q3	3.9	2.9	4.9	4.2	3.0	6.6	4.0	3.4	3.8
2018 Q4	4.8	4.9	5.3	5.2	4.9	5.7	4.6	4.8	5.2
2019 Q1	4.7	4.6	4.9	4.9	5.1	4.5	4.4	4.5	4.6
2019 Q2	3.7	4.1	4.8	3.9	4.0	5.3	4.3	3.5	4.2
2019 Q3	4.6	4.6	6.2	6.1	4.4	5.0	5.1	4.3	4.8
2019 Q4	4.2	4.2	4.3	4.1	3.8	4.6	3.9	3.9	4.3
2020 Q1	4.6	4.3	4.2	5.2	3.4	4.5	3.5	3.4	3.9
2020 Q2	4.2	3.2	3.7	3.4	3.3	3.6	3.4	3.0	3.3
2020 Q3	5.8	6.1	5.2	5.6	4.9	5.5	5.3	5.8	5.9
2020 Q4	4.5	2.9	5.0	4.2	3.0	5.3	3.8	2.4	3.9
2021 Q1	6.1	4.3	7.3	6.7	3.7	7.1	5.7	2.2	6.1
2021 Q2	11.3	11.7	10.9	11.4	10.0	9.6	10.6	11.9	10.0
2021 Q3	7.1	3.1	9.2	4.6	5.0	7.8	5.4	3.3	5.6
2021 Q4	9.8	8.4	13.8	12.0	13.6	11.7	10.4	6.1	9.3
2022 Q1	12.4	3.7	10.1	9.1	5.2	10.1	6.7	5.2	8.0
2022 Q2	10.8	7.4	12.4	8.8	7.1	8.9	7.6	6.7	9.3
2022 Q3	13.7	7.4	9.8	8.2	8.9	7.8	7.4	7.1	7.7
2022 Q4	7.5	3.3	8.2	3.1	5.8	6.6	4.8	2.5	7.2
2023 Q1	5.4	5.0	7.8	4.3	3.8	5.1	4.6	2.7	4.2
2023 Q2	6.6	11.4	7.8	6.6	6.7	7.2	6.6	5.4	7.0
2023 Q3	9.8	12.9	10.4	5.0	5.8	4.6	9.5	1.8	7.9
2023 Q4	7.3	5.8	10.2	5.4	6.2	6.9	8.9	5.9	4.8
2024 Q1	8.8	5.0	9.6	4.9	4.9	4.5	5.2	6.1	4.5
2024 Q2	5.6	1.9	11.9	4.9	6.6	5.7	5.5	3.4	3.2
2024 Q3	8.0	11.9	6.7	4.0	10.1	3.7	8.1	13.0	11.4
2024 Q4	7.7	8.5	13.2	7.7	6.3	5.3	7.4	8.6	5.0
2025 Q1	7.9	10.9	8.3	9.9	9.3	9.5	9.3	2.4	9.8
2025 Q2	6.9	7.1	6.9	3.8	5.9	6.5	6.2	6.9	6.8
2025 Q3	8.9	11.3	6.5	11.5	6.2	5.2	5.3	12.1	1.9

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Project Backlog Indicator

TABLE 4: INTERIOR DESIGNERS, BY U.S. CENSUS REGIONAL DIVISIONS

Quarter	East North Central Division	East South Central Division	Middle Atlantic Division	Mountain Division	New England Division	Pacific Division	South Atlantic Division	West North Central Division	West South Central Division
2018 Q1	4.9	5.9	4.3	5.9	5.4	4.9	5.1	5.8	5.6
2018 Q2	6.8	7.8	5.8	7.6	7.7	7.7	6.9	7.6	6.7
2018 Q3	7.3	9.0	6.3	8.0	8.3	7.1	7.4	8.9	7.7
2018 Q4	5.3	5.1	5.0	5.5	5.8	4.7	5.1	5.4	5.5
2019 Q1	4.9	4.6	4.0	5.4	5.1	5.2	4.9	4.9	4.8
2019 Q2	5.0	5.3	4.7	5.8	5.2	5.3	5.1	5.7	5.3
2019 Q3	3.5	3.5	3.8	4.0	3.8	4.4	3.8	3.6	3.9
2019 Q4	3.6	4.7	3.5	4.3	3.9	4.1	3.8	3.2	3.5
2020 Q1	5.4	6.0	4.7	6.8	6.2	4.7	4.9	6.1	5.3
2020 Q2	3.6	4.1	3.8	4.4	3.8	3.5	3.6	3.7	3.7
2020 Q3	2.4	2.1	3.3	3.7	2.5	2.6	2.7	2.2	2.8
2020 Q4	5.7	5.1	4.0	6.0	5.7	4.5	4.6	5.0	4.9
2021 Q1	4.9	5.1	4.2	6.5	4.7	4.8	4.7	5.2	4.9
2021 Q2	4.9	3.9	4.9	4.9	4.4	4.6	4.9	4.2	4.3
2021 Q3	7.2	9.7	8.8	10.0	9.4	7.4	8.6	10.0	8.9
2021 Q4	5.7	6.5	5.9	7.0	6.9	6.5	5.8	6.0	6.0
2022 Q1	6.1	6.3	5.5	7.8	7.7	7.3	6.4	7.1	6.3
2022 Q2	6.0	5.4	5.7	6.6	6.2	5.8	5.6	5.5	5.4
2022 Q3	4.9	4.3	5.5	6.5	5.2	5.7	5.0	5.3	5.1
2022 Q4	10.5	13.3	8.3	12.7	12.6	8.5	10.2	12.2	12.0
2023 Q1	5.2	4.9	4.9	6.9	5.4	6.4	5.4	4.9	6.0
2023 Q2	7.1	3.3	5.0	3.6	3.6	4.7	4.4	3.4	3.5
2023 Q3	4.1	3.0	4.4	3.9	4.1	4.2	5.4	3.6	3.0
2023 Q4	3.2	3.4	5.1	5.0	3.3	4.1	4.0	3.2	3.7
2024 Q1	2.9	3.4	5.5	4.5	5.3	3.3	2.9	2.9	2.7
2024 Q2	4.6	4.3	4.9	4.5	4.6	4.4	4.9	5.6	4.7
2024 Q3	2.3	2.4	4.3	2.2	4.6	3.1	2.3	3.4	2.5
2024 Q4	4.0	1.5	4.5	5.0	6.5	3.9	3.5	3.3	3.3
2025 Q1	4.6	4.3	4.8	4.8	4.6	4.5	4.6	4.5	4.8
2025 Q2	4.9	5.3	4.9	5.3	5.5	5.4	4.3	5.3	3.6
2025 Q3	3.0	4.3	4.7	4.8	6.6	4.3	3.4	4.0	6.9

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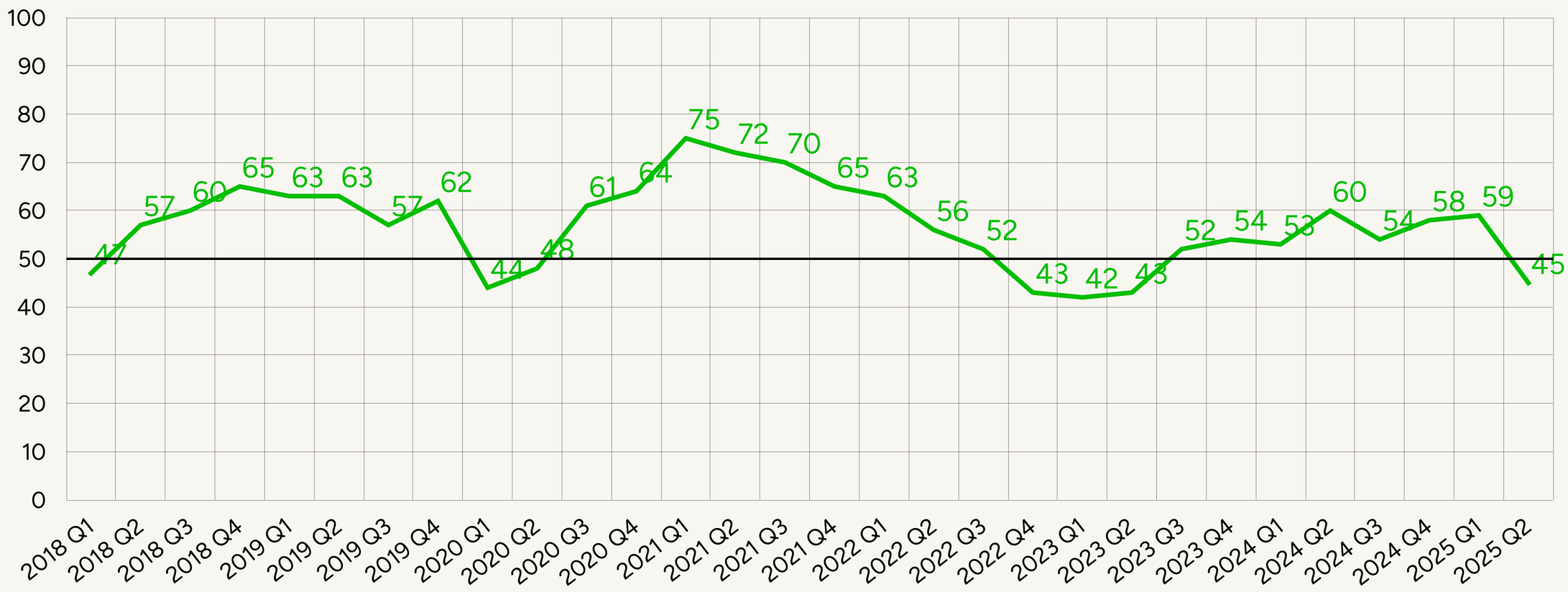
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Recent Business Activity Indicator

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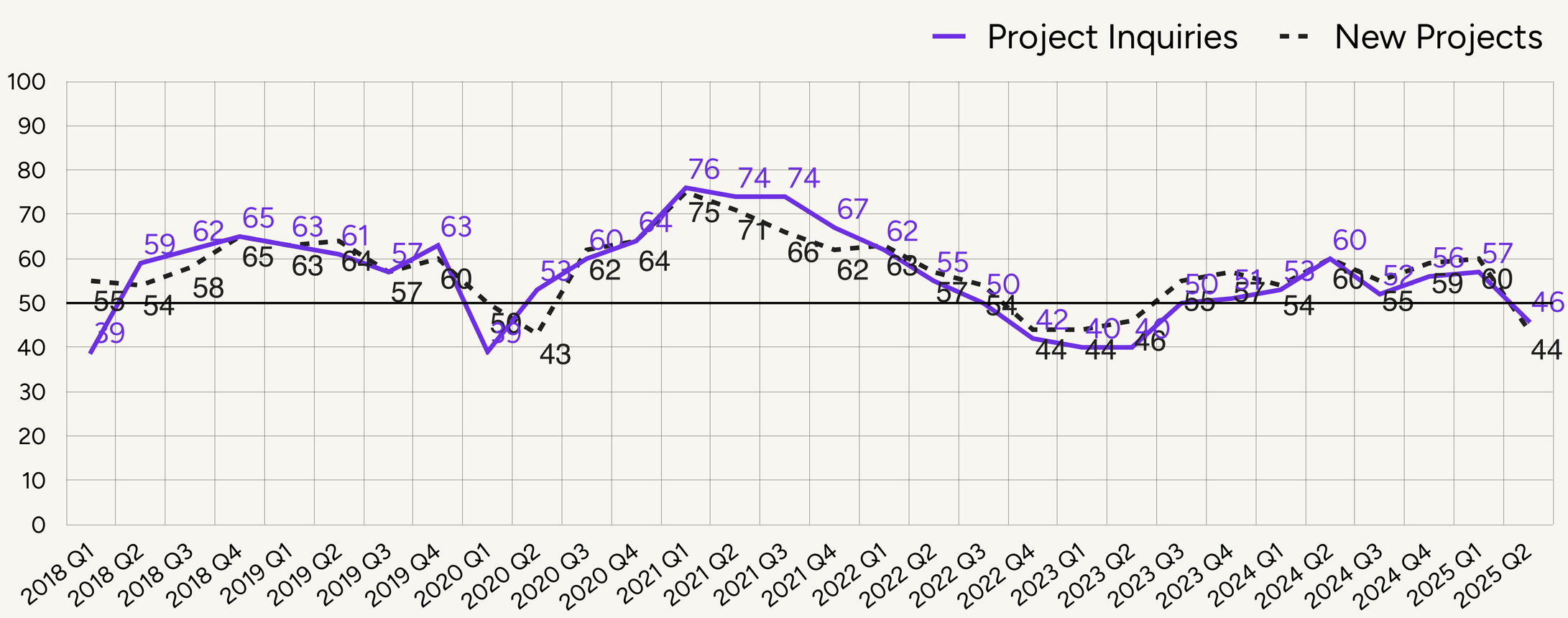
Recent Business Activity Indicator

FIGURE 1: RECENT BUSINESS ACTIVITY INDICATOR - NATIONAL



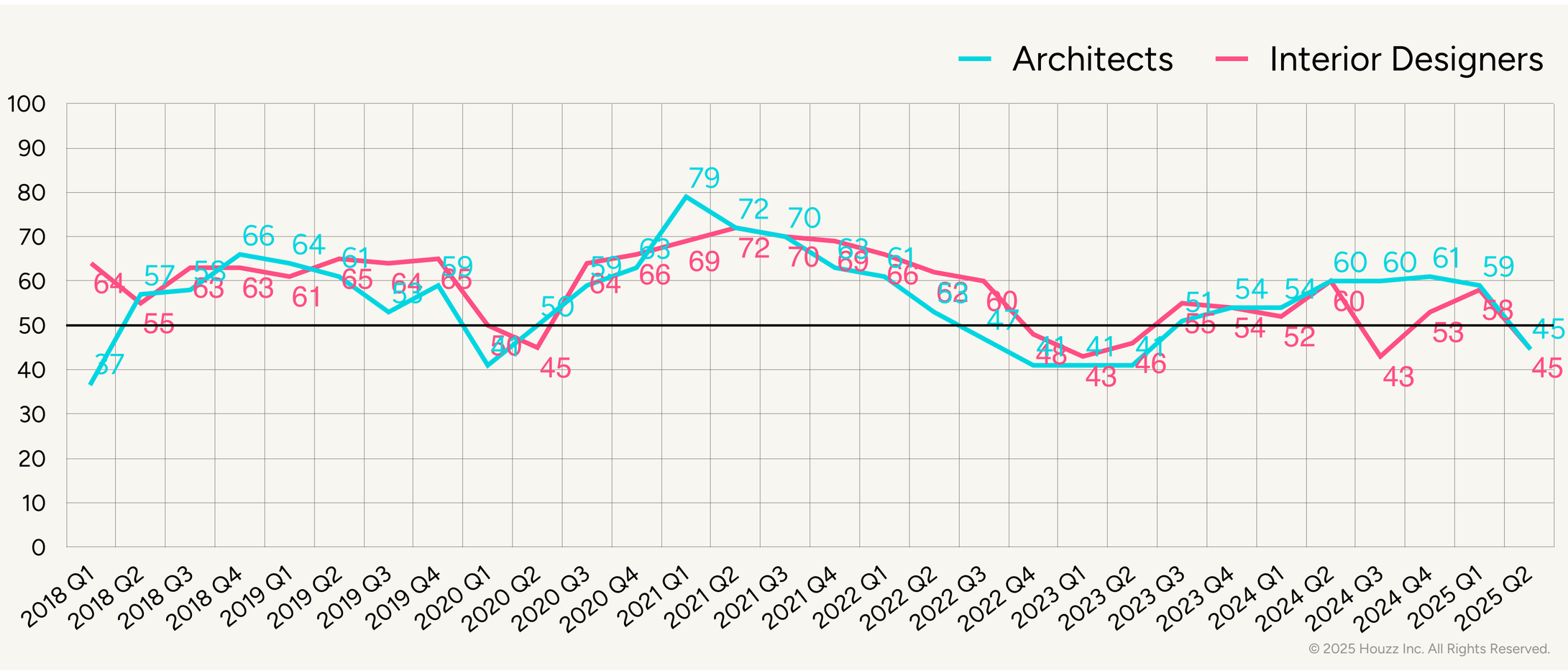
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FIGURE 2: RECENT BUSINESS ACTIVITY INDICATOR - COMPONENTS



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FIGURE 3: RECENT BUSINESS ACTIVITY INDICATOR – SUBSECTORS



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Recent Business Activity Indicator

TABLE 1: NATIONAL

Quarter	Overall	Project Inquiries	New Projects
2018 Q1	47	39	55
2018 Q2	57	59	54
2018 Q3	60	62	58
2018 Q4	65	65	65
2019 Q1	63	63	63
2019 Q2	63	61	64
2019 Q3	57	57	57
2019 Q4	62	63	60
2020 Q1	44	39	50
2020 Q2	48	53	43
2020 Q3	61	60	62
2020 Q4	64	64	64
2021 Q1	75	76	75
2021 Q2	72	74	71
2021 Q3	70	74	66
2021 Q4	65	67	62
2022 Q1	63	62	63
2022 Q2	56	55	57
2022 Q3	52	50	54
2022 Q4	43	42	44
2023 Q1	42	40	44
2023 Q2	43	40	46
2023 Q3	52	50	55
2023 Q4	54	51	57
2024 Q1	53	53	54
2024 Q2	60	60	60
2024 Q3	54	52	55
2024 Q4	58	56	59
2025 Q1	59	57	60
2025 Q2	45	46	44

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Recent Business Activity Indicator

TABLE 2: ARCHITECTS

Quarter	Overall	Project Inquiries	New Projects
2018 Q1	37	26	47
2018 Q2	57	62	53
2018 Q3	58	62	55
2018 Q4	66	67	65
2019 Q1	64	65	62
2019 Q2	61	59	63
2019 Q3	53	54	52
2019 Q4	59	62	57
2020 Q1	41	33	49
2020 Q2	50	54	46
2020 Q3	59	60	57
2020 Q4	63	63	62
2021 Q1	79	78	80
2021 Q2	72	75	70
2021 Q3	70	76	63
2021 Q4	63	68	57
2022 Q1	61	62	59
2022 Q2	53	52	53
2022 Q3	47	44	49
2022 Q4	41	40	41
2023 Q1	41	37	45
2023 Q2	41	40	42
2023 Q3	51	48	53
2023 Q4	54	51	57
2024 Q1	54	54	55
2024 Q2	60	60	60
2024 Q3	60	58	63
2024 Q4	61	60	62
2025 Q1	59	59	59
2025 Q2	45	48	42

TABLE 3: INTERIOR DESIGNERS

Quarter	Overall	Project Inquiries	New Projects
2018 Q1	64	60	68
2018 Q2	55	55	55
2018 Q3	63	63	64
2018 Q4	63	61	65
2019 Q1	61	59	63
2019 Q2	65	64	67
2019 Q3	64	62	65
2019 Q4	65	65	66
2020 Q1	50	47	52
2020 Q2	45	50	39
2020 Q3	64	59	68
2020 Q4	66	65	67
2021 Q1	69	72	66
2021 Q2	72	73	72
2021 Q3	70	69	72
2021 Q4	69	67	71
2022 Q1	66	63	69
2022 Q2	62	61	64
2022 Q3	60	59	61
2022 Q4	48	46	49
2023 Q1	43	45	42
2023 Q2	46	39	53
2023 Q3	55	54	57
2023 Q4	54	51	56
2024 Q1	52	51	53
2024 Q2	60	59	61
2024 Q3	43	43	43
2024 Q4	53	51	55
2025 Q1	58	54	61
2025 Q2	45	44	45

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Methodology

The **Houzz Renovation Barometer** is based on a quarterly online survey sent to a U.S. panel of businesses with an online profile on Houzz. The Barometer keeps a pulse on home renovation market conditions via three distinct indices that track expected, current, and recent business activity in two related industry sectors: the construction sector and the architectural and design services sector.

The Expected Business Activity Indicator is based on survey questions that ask businesses to report whether they expect the number of project inquiries and new projects* to increase, decrease, or remain unchanged in the upcoming quarter relative to the prior quarter. Scores for each component are then computed as seasonally adjusted diffusion indices on a scale of 0 to 100, with index values over 50 indicating that a greater proportion of firms reported quarter-over-quarter increases than decreases. The new projects component includes reported changes to the number of new projects and the size of new projects and uses 80% and 20% weights, respectively, to arrive at the final new projects component.

The Recent Business Activity Indicator is based on survey questions that ask businesses to report whether they observed the actual number of project inquiries and new projects* increasing, decreasing, or remaining unchanged in the most recent quarter relative to the prior quarter. Scores for each component are then computed as seasonally adjusted diffusion indices similar to the Expected Business Activity Indicator.

The Recent Business Activity Indicator scores can be compared with the Expected Business Activity Indicator scores for any given quarter to see whether actual activity met, exceeded, or fell short of expectations.

Finally, **the Project Backlog Indicator** is based on survey questions that ask businesses to report wait times in weeks before a company can start work on a new midsize project at the start of the upcoming quarter. Scores are computed as average wait times without a seasonal adjustment.

The **Houzz Renovation Barometer** is nationally representative of business activity related to work performed on owner-occupied existing homes, as reported by businesses who state that in the last 12 months, at least 20% of their revenues came from residential remodeling services. Each of the three indicators is available for two subsectors in the construction sector (build-only remodelers and design and build remodelers) and for two subsectors in the architectural and design services sector (architects and interior designers), as well as for nine regions that follow the U.S. Census Bureau divisions.

The aggregated national sector-level indices are computed by:

1. Aggregating regional subsector indices to national levels using division-level weights derived from the 2016 U.S. Census County Business Patterns survey, and
2. Aggregating national sector-level indices to sector levels using subsector weights derived from the 2016 U.S. Census County Business Patterns survey and 2016 BLS Current Employment Statistics Peak Trough series.

Final national weights are equally distributed for build-only remodelers and design and build remodelers in the construction sector. The final national weights are 63% and 37% for architects and interior designers, respectively, in the architectural and design services subsector.

The **Houzz Renovation Barometer** survey for the current quarter was fielded June 14 through July 1st, 2025. N=929 (260 design and build remodelers, 135 build-only remodelers, 166 architects, and 368 interior designers).

*The *new projects component* includes reported changes to the *number of new projects* and the *size of new projects* and uses 80% and 20% weights, respectively.

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