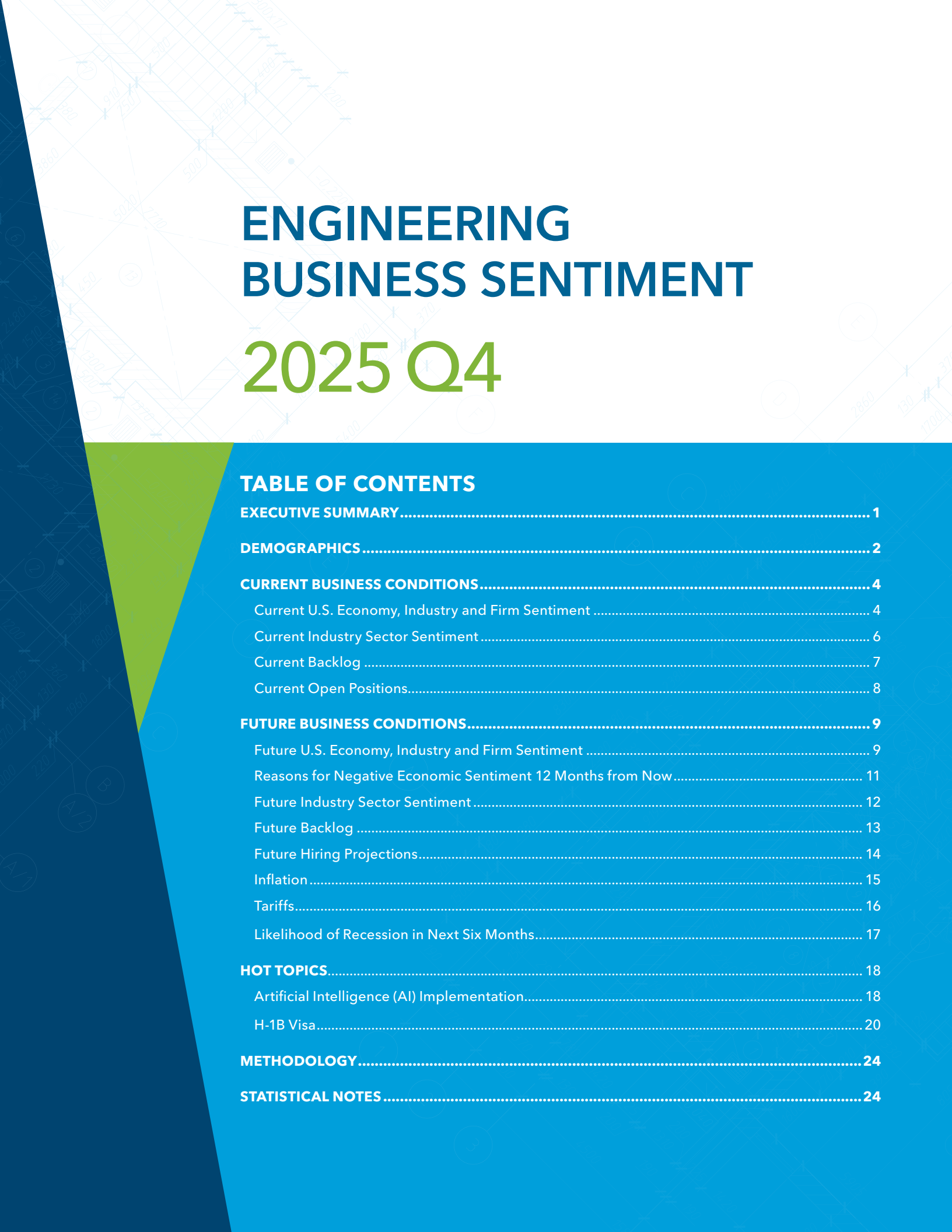


# ENGINEERING BUSINESS SENTIMENT 2025 Q4

**DECEMBER 2025**



# ENGINEERING BUSINESS SENTIMENT

## 2025 Q4

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# EXECUTIVE SUMMARY

The 2025 Q4 Engineering Business Sentiment reveals an industry that continues to demonstrate resilience and optimism despite a shifting economic environment. Current sentiment remains notably strong: firms report high confidence in both their financial position and the engineering and design services industry more broadly, driven in part by sustained demand in top-performing market sectors such as Data Centers and Energy and Utilities. Backlogs remain healthy for many firms, hiring needs persist across the sector, and larger firms in particular express elevated confidence relative to their smaller counterparts. However, optimism regarding the U.S. economy has softened significantly from the previous quarter, reflecting increasing caution as leaders evaluate national conditions.

Looking ahead, future sentiment is more tempered. While firms expect continued strength in their own financial outlook and gradual improvement in industry conditions, expectations for the U.S. economy have dipped into negative territory. Political uncertainty and broader economic unpredictability dominate the concerns shaping this outlook, along with persistent worries about inflation, tariffs, and the possibility of a recession. Even so, firms project modest growth in backlogs and report strong hiring intentions for the coming year, particularly large firms and those located in the Northeast, suggesting that organizations remain prepared to invest in long-term capacity despite near-term volatility.

This quarter's "hot topics" provide important context for the workforce and technology environment shaping the sector's trajectory. Artificial Intelligence (AI) adoption remains early-stage across most firms, characterized largely by limited deployment or exploratory pilot projects rather than full-scale integration. At the same time, leaders express strong support for expanding access to H-1B visas to address ongoing talent shortages, with nearly half of firms already employing visa holders. Yet the near-unanimous negative reaction to a proposed \$100,000 per-hire fee illustrates the tension between workforce needs and potential policy barriers that could restrict access to global engineering talent.

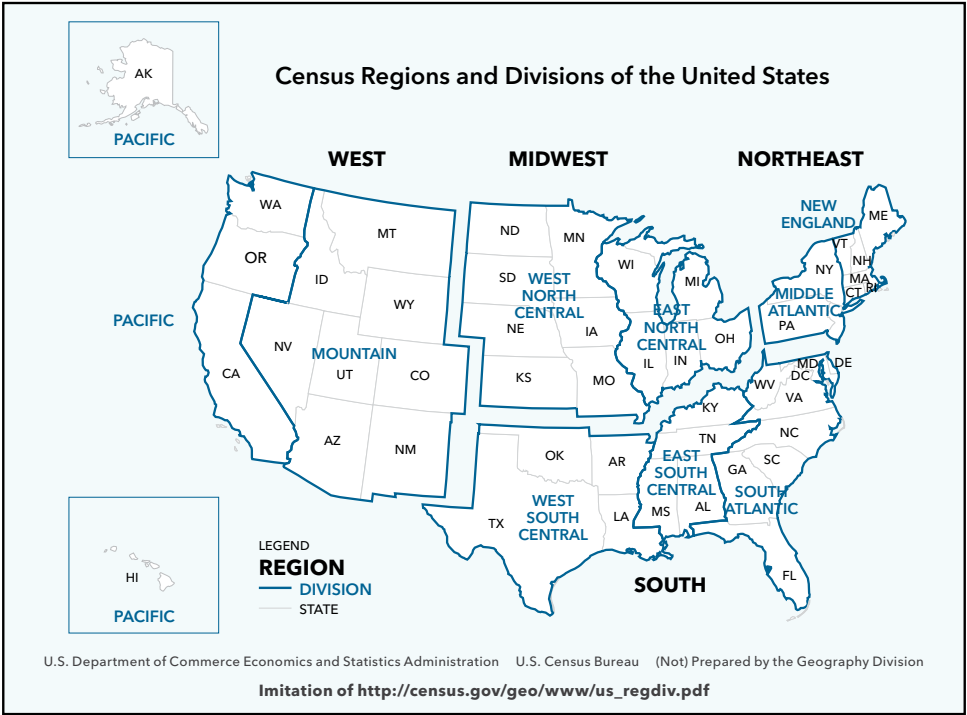
Together, these findings portray an industry that remains confident in its operational strength and strategic direction while simultaneously expressing caution about national economic conditions. Firms appear prepared to navigate uncertainty—continuing to hire, exploring emerging technologies, and sustaining strong sector-level optimism—even as they call attention to structural challenges such as workforce shortages and the broader macroeconomic climate.

Note: This study was conducted between October 28 and November 10, 2025, during which time the U.S. was experiencing a federal government shutdown.

# DEMOGRAPHICS

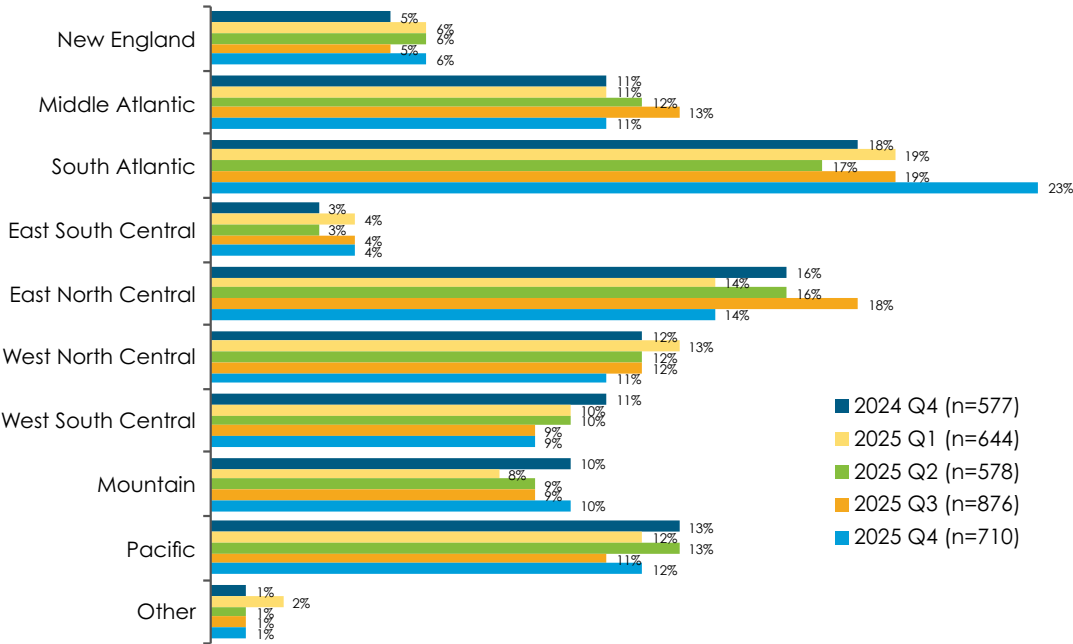
- For reference, the ACEC Research Institute uses the U.S. Census Bureau definition of geographic regions seen in Figure 1 below.

Figure 1: U.S. Census Regions of the United States



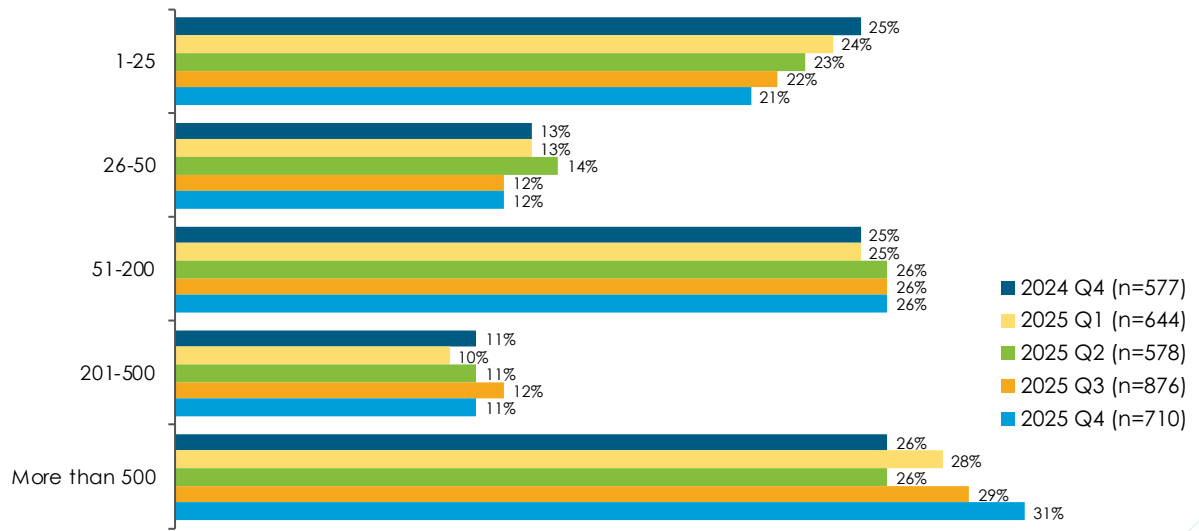
- Respondents' firms are widely dispersed across the United States. A few respondents (Other) indicate their firm is headquartered outside the U.S. These results are statistically similar to previous quarters.

Figure 2: Location of Organization Headquarters



- The median number of full-time employees at respondents' firms is 135 versus 110 last quarter.

**Figure 3: Number of Full-Time Equivalents at Firm**

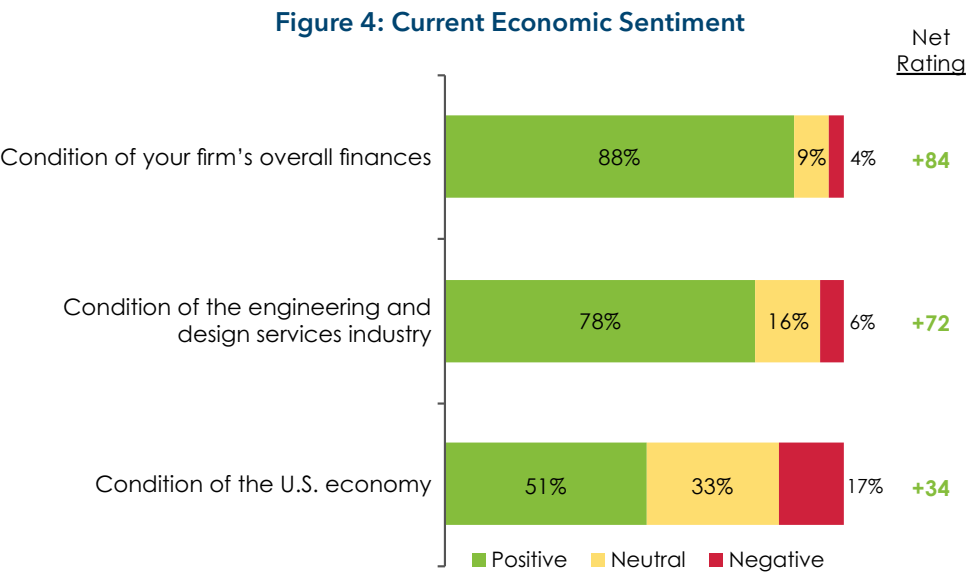


# CURRENT BUSINESS CONDITIONS

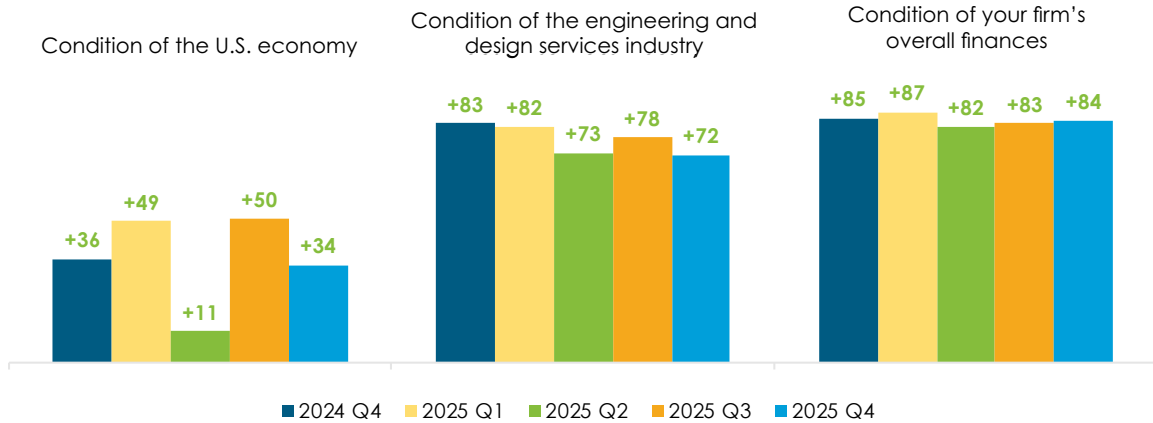
Current business sentiment in the engineering sector remains largely positive, with strong Net Ratings for firm finances (+84) and the industry overall (+72), although optimism about the U.S. economy has weakened significantly, dropping 16 points to +34. Larger firms, especially those with more than 200 FTEs, express the highest confidence in both their own financial condition and the broader industry, and Midwest firms report the strongest economic outlook. Most market sectors continue to show high optimism, particularly Data Centers and Energy and Utilities, though half of all sectors saw declines from the previous quarter. Backlogs remain solid, with nearly half of firms carrying one year or more of work, and hiring pressure persists: 92 percent of firms have open positions, and a notable portion report double-digit percentages of unfilled roles.

## Current U.S. Economy, Industry and Firm Sentiment

- Current sentiment is positive. The Net Ratings for firms’ finances (+84) and for the industry (+72) are high. The Net Rating for the U.S. economy is +34.
- Firms with more than 200 FTEs are the most positive about their firm’s finances (+96).
- Firms with more than 500 FTEs have the highest confidence in the engineering and design services industry (+79).
- Sentiment for the U.S. economy is most positive among firms in the Midwest (+40).



**Figure 5: Current Economic Sentiment vs. Previous Quarters**



- Optimism about the U.S. economy decreased compared to the previous quarter, dropping 16 points to +34.
- Nearly all segments are feeling much less optimistic about the state of the U.S. economy than last quarter.

**Figure 6: Current Condition of U.S. Economy vs. Previous Quarters - By Region and Firm Size**

Condition of the U.S. economy	2024 Q4 (n=569)	2025 Q1 (n=637)	2025 Q2 (n=565)	2025 Q3 (n=867)	2025 Q4 (n=695)	Change vs. Previous Quarter	Change vs. Previous Year
<b>TOTAL</b>	<b>+36</b>	<b>+49</b>	<b>+11</b>	<b>+50</b>	<b>+34</b>	<b>-16</b>	<b>-2</b>
<b>REGION</b>							
Northeast	+45	+50	+9	+61	+34	-27	-11
South	+21	+47	+12	+54	+38	-16	+17
Midwest	+47	+50	+16	+43	+40	-3	-7
West	+36	+53	+5	+43	+23	-20	-13
<b>FIRM SIZE</b>							
1-25	+26	+35	+8	+47	+27	-20	+1
26-50	+23	+44	+7	+42	+15	-27	-8
51-200	+33	+53	+6	+44	+37	-7	+4
201-500	+40	+54	+20	+48	+50	+2	+10
More than 500	+54	+59	+18	+61	+39	-22	-15

# Current Industry Sector Sentiment

- Current sentiment remains very optimistic within most market sectors. Sentiment is strongest in Data Centers (+86) and Energy and Utilities (+79).
- Half of sectors saw declines compared to last quarter and most compared to one year ago.

Figure 7: Current Industry Sentiment by Sector vs. Previous Quarters

Current Industry Sector Sentiment	2024 Q4 (n=187-436)	2025 Q1 (n=211-484)	2025 Q2 (n=197-444)	2025 Q3 (n=275-678)	2025 Q4 (n=258-551)	Change vs. Previous Quarter	Change vs. Previous Year
Commercial Real Estate	+12	+17	+13	+23	+25	+2	+13
Data Centers	+75	+81	+78	+85	+86	+1	+11
Convention Centers, Sports Facilities and Cultural Facilities	+37	+44	+32	+40	+41	+1	+4
Energy and Utilities	+78	+76	+74	+73	+79	+6	+1
Industrial and Manufacturing Facilities	+63	+64	+57	+61	+60	-1	-3
Justice	+31	+32	+20	+26	+27	+1	-4
Residential–Land Development	+34	+24	+28	+29	+30	+1	-4
Telecommunications	+55	+50	+53	+57	+50	-7	-5
Healthcare Facilities	+68	+66	+56	+58	+62	+4	-6
Water/Wastewater	+83	+82	+76	+78	+74	-4	-9
Science and Technology	+66	+69	+47	+59	+56	-3	-10
Transportation–Airports	+79	+76	+71	+75	+67	-8	-12
Transportation–Roads and Bridges	+83	+75	+70	+76	+67	-9	-16
Education	+58	+52	+37	+42	+41	-1	-17
Transportation–Transit	+69	+63	+52	+55	+47	-8	-22
Federal/Military, State and Local Government Buildings	+66	+63	+34	+47	+39	-8	-27



# Current Backlog

- Nearly half of respondents (48%) indicate their firm has a current backlog of one year or more.
- Median backlog for projects declined slightly to 11 months.
- As is typically the case, firms with fewer FTEs have smaller backlogs compared to firms with more than 200 FTEs.

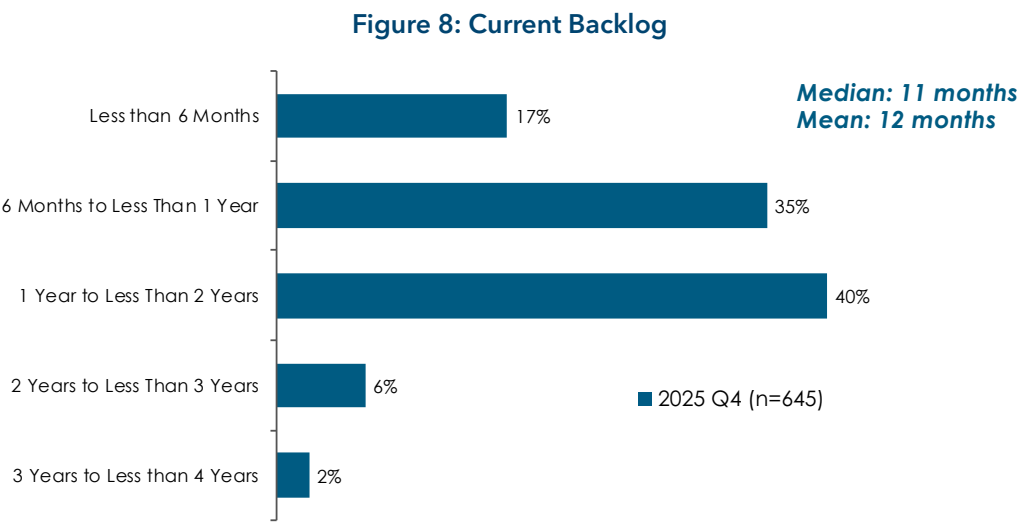


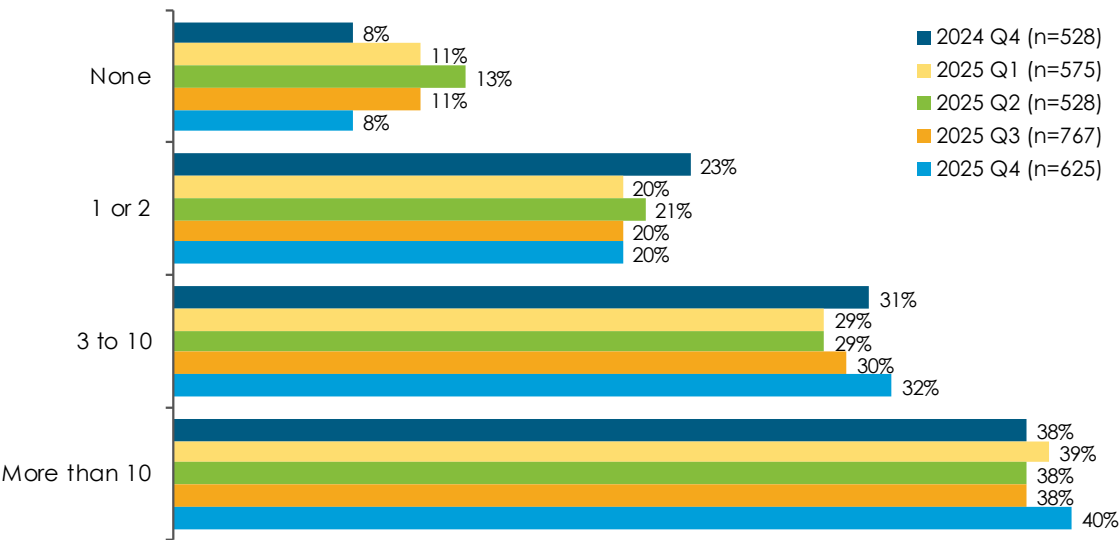
Figure 9: Current Backlog vs. Previous Quarters - By Region and Firm Size

Current Backlog	2024 Q4 (n=537)	2025 Q1 (n=590)	2025 Q2 (n=539)	2025 Q3 (n=788)	2025 Q4 (n=645)	Change vs. Previous Quarter	Change vs. Previous Year
TOTAL	12	11	10	12	11	-1	-1
REGION							
Northeast	12	12	12	12	12	0	0
South	12	10	10	12	12	0	0
Midwest	12	12	11	12	11	-1	-1
West	9	8	10	10	9	-1	0
FIRM SIZE							
1-25	6	6	6	6	6	0	0
26-50	9	9	10	12	10	-2	+1
51-200	12	12	11	12	11	-1	-1
201-500	12	12	12	12	12	0	0
More than 500	14	14	12	13	12	-1	-2

# Current Open Positions

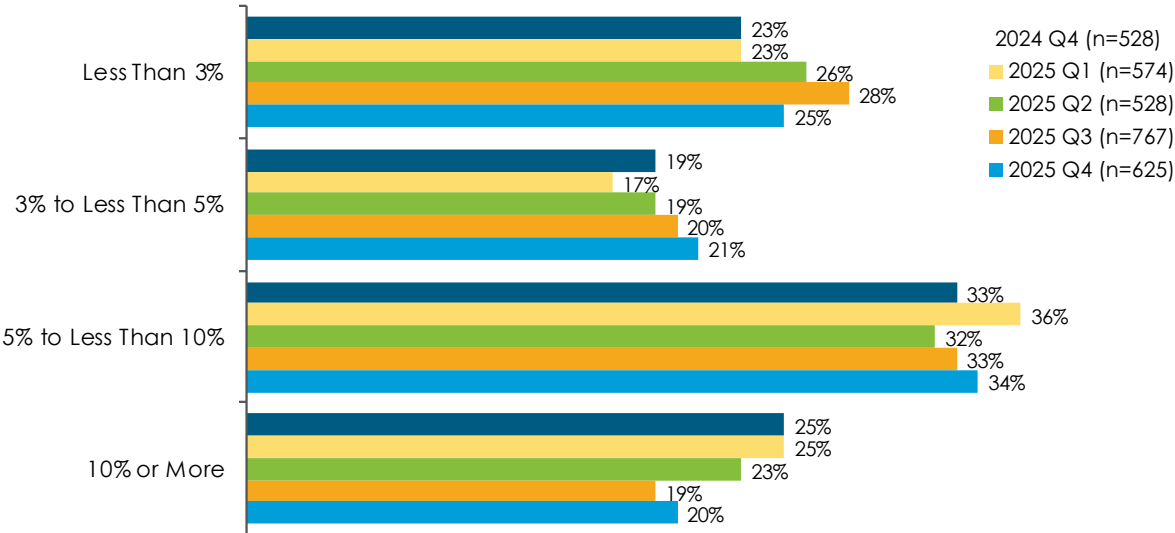
- Ninety-two percent of firms still have at least one opening, a slight increase of three points from last quarter. The median number of open positions increased from five to six.

Figure 10: Current Number of Open Positions vs. Previous Quarters



- On average, seven percent of positions remain unfilled, down from eight percent in the previous quarter and nine percent in the first quarter.
- Twenty percent of firms are reporting 10 percent or more positions are unfilled.

Figure 11: Open Positions as Percentage of Overall FTEs

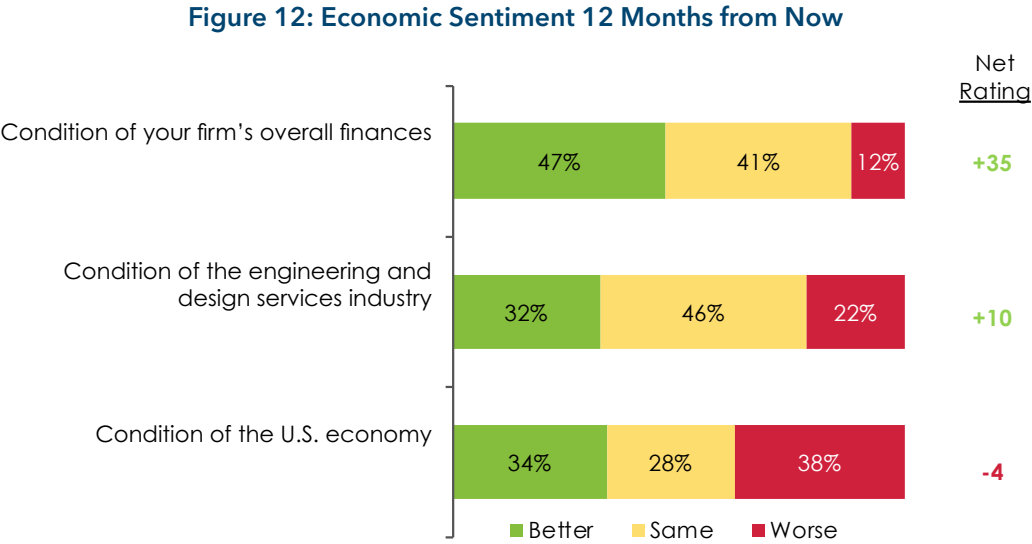


# FUTURE BUSINESS CONDITIONS

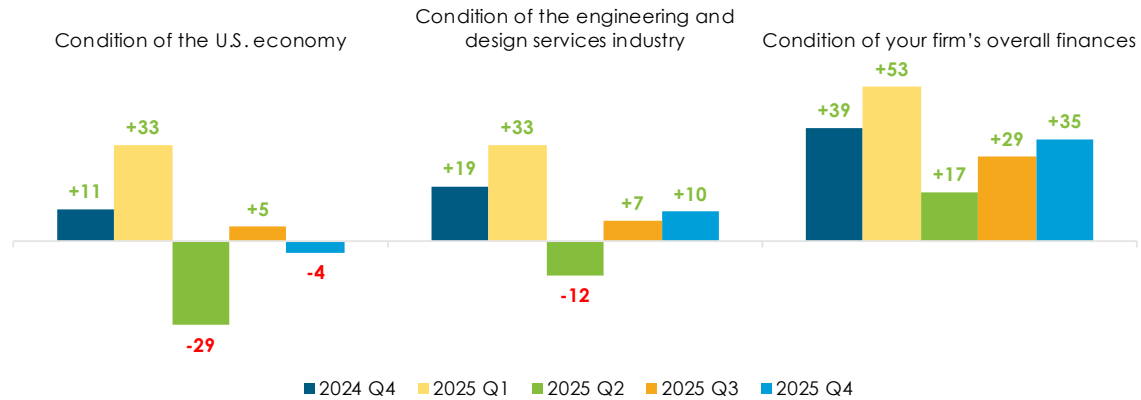
Future sentiment is mixed: while firms remain positive about their own financial conditions (+35) and the industry’s outlook (+10), expectations for the U.S. economy have dipped into negative territory at -4. Future economic optimism continues to fall across nearly all segments and regions compared to both last quarter and last year, driven primarily by Political uncertainty (89%) and General economic uncertainty (77%). Expectations for industry sectors remain mostly positive, with Data Centers and Energy and Utilities again leading, while Justice falls into negative territory. Firms foresee modest growth in backlogs (+21) and strong hiring activity (+57), especially among large firms and those in the Northeast. Concern about inflation and tariffs remains elevated, and leaders estimate a 45 percent chance of recession within the next six months.

## Future U.S. Economy, Industry and Firm Sentiment

- Future sentiment is positive on two of the three metrics, with condition of firms’ finances looking the strongest (+35). The condition of the U.S. economy has slipped into negative territory (-4).
- Future sentiment for the U.S. economy decreased nine points from last quarter, while industry sentiment and firms’ finances increased three and six points, respectively. Levels are still well below their highs in the first quarter of this year.



**Figure 13: Economic Sentiment 12 Months from Now vs. Previous Quarters**



- All but one segment decreased from the prior quarter and from last year when asked about the future of the U.S. economy.

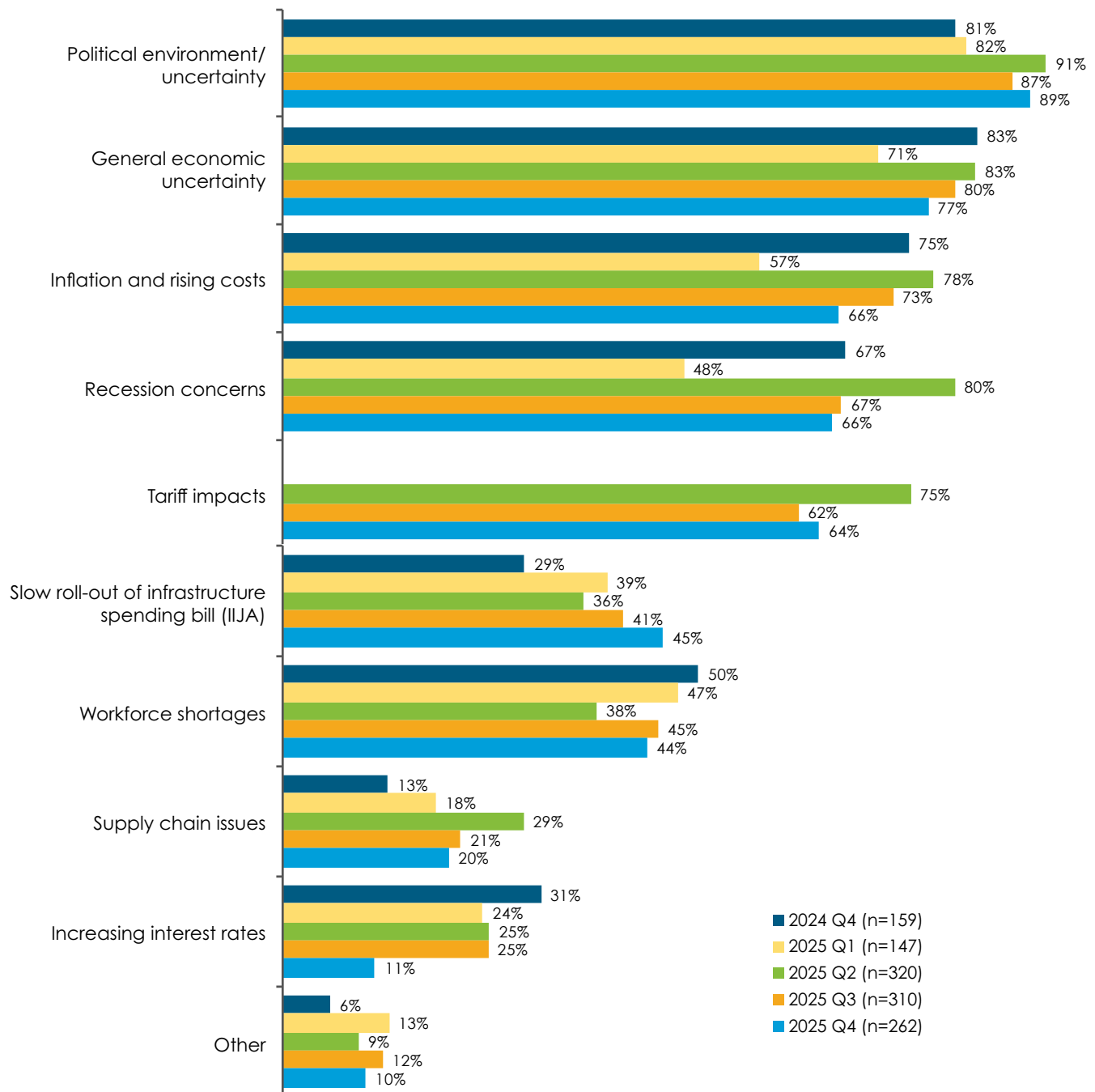
**Figure 14: Condition of U.S. Economy 12 Months from Now vs. Previous Quarters - By Region and Firm Size**

<i>Condition of the U.S. economy</i>	2024 Q4 (n=491)	2025 Q1 (n=571)	2025 Q2 (n=521)	2025 Q3 (n=765)	2025 Q4 (n=633)	Change vs. Previous Quarter	Change vs. Previous Year
<b>TOTAL</b>	+11	+33	-29	+5	-4	-9	-15
<b>REGION</b>							
Northeast	+20	+37	-33	+8	-9	-17	-29
South	+7	+46	-17	+21	+18	-3	+11
Midwest	+9	+24	-32	-9	-19	-10	-28
West	+14	+21	-41	-1	-14	-13	-28
<b>FIRM SIZE</b>							
1-25	0	+28	-33	+2	-14	-16	-14
26-50	+3	+22	-43	+2	-7	-9	-10
51-200	+21	+33	-23	+7	-1	-8	-22
201-500	+15	+43	-19	-3	+1	+4	-14
More than 500	+13	+37	-29	+12	+1	-11	-12

## Reasons for Negative Economic Sentiment 12 Months from Now

- Political environment/uncertainty (89%) and General economic uncertainty (77%) are fueling negative future sentiment.
  - Political environment/uncertainty increased two points from last quarter.
  - General economic uncertainty declined three points.
  - Concerns about inflation declined by seven points.
  - Recession concerns declined one point.
  - Tariff impacts increased two points.

Figure 15: Reasons for Economic Sentiment 12 Months from Now



## Future Industry Sector Sentiment

- Future industry sentiment is positive in most sectors and is highest in Data Centers (+53) and Energy and Utilities (+47).
- Future sentiment is the weakest in Justice (-4).
- Future industry sentiment increased across most sectors from last quarter but remains mostly below levels from one year ago.

Figure 16: Industry Sentiment by Sector 12 Months from Now vs. Previous Quarters

Future Industry Sector Sentiment	2024 Q4 (n=219-421)	2025 Q1 (n=250-470)	2025 Q2 (n=228-430)	2025 Q3 (n=311-639)	2025 Q4 (n=277-528)	Change vs. Previous Quarter	Change vs. Previous Year
Data Centers	+37	+60	+36	+52	+53	+1	+16
Commercial Real Estate	+3	+24	-23	-1	+8	+9	+5
Telecommunications	+17	+36	+6	+18	+22	+4	+5
Energy and Utilities	+47	+56	+30	+35	+47	+12	0
Industrial and Manufacturing Facilities	+31	+50	+24	+27	+31	+4	0
Convention Centers, Sports Facilities and Cultural Facilities	-1	+11	-28	-3	-3	0	-2
Justice	0	+5	-25	-6	-4	+2	-4
Residential—Land Development	+18	+30	-18	+3	+14	+11	-4
Water/Wastewater	+39	+42	+16	+27	+32	+5	-7
Healthcare Facilities	+30	+32	-5	+8	+21	+13	-9
Science and Technology	+25	+37	-5	+10	+16	+6	-9
Transportation—Roads and Bridges	+37	+40	+10	+26	+27	+1	-10
Education	+10	+18	-22	-10	-1	+9	-11
Transportation—Airports	+36	+38	+6	+32	+25	-7	-11
Federal/Military, State and Local Government Buildings	+24	+28	-29	+7	+10	+3	-14
Transportation—Transit	+34	+26	-10	+8	+7	-1	-27

# Future Backlog

- Forty-three percent believe their firms will see a higher backlog of projects 12 months from now, resulting in a Net Rating of +21 (unchanged from last quarter).
- Backlog sentiment has increased in some segments and decreased in others compared to last quarter, but it remains well below levels from one year ago.
- Firms in the South have the highest future backlog Net Rating (+25) compared to other regions.
- Firms with more than 500 FTEs have the highest future backlog Net Rating (+28) compared to other firm sizes.

Figure 17: Backlog 12 Months from Now

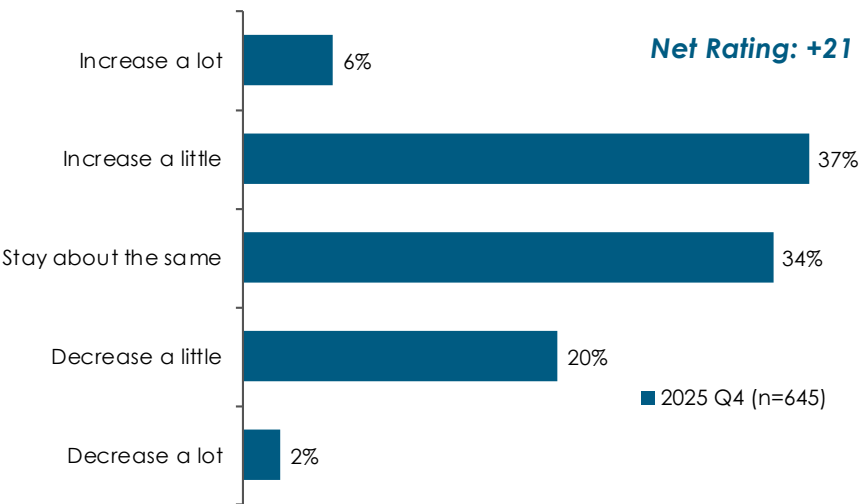


Figure 18: Backlog 12 Months from Now - Net Rating Trend

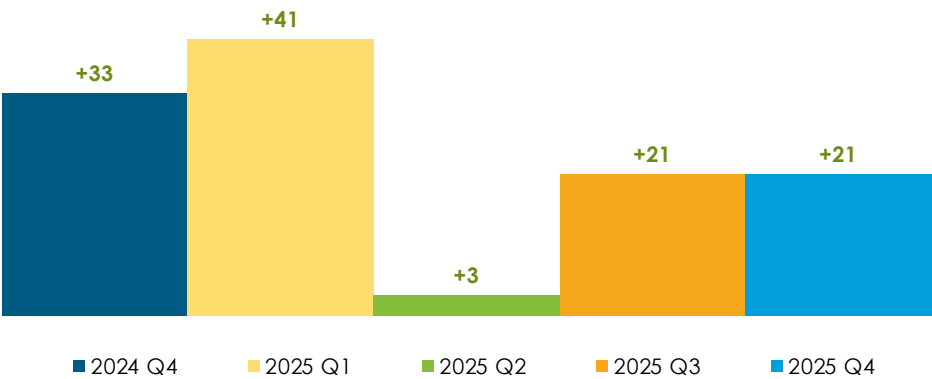


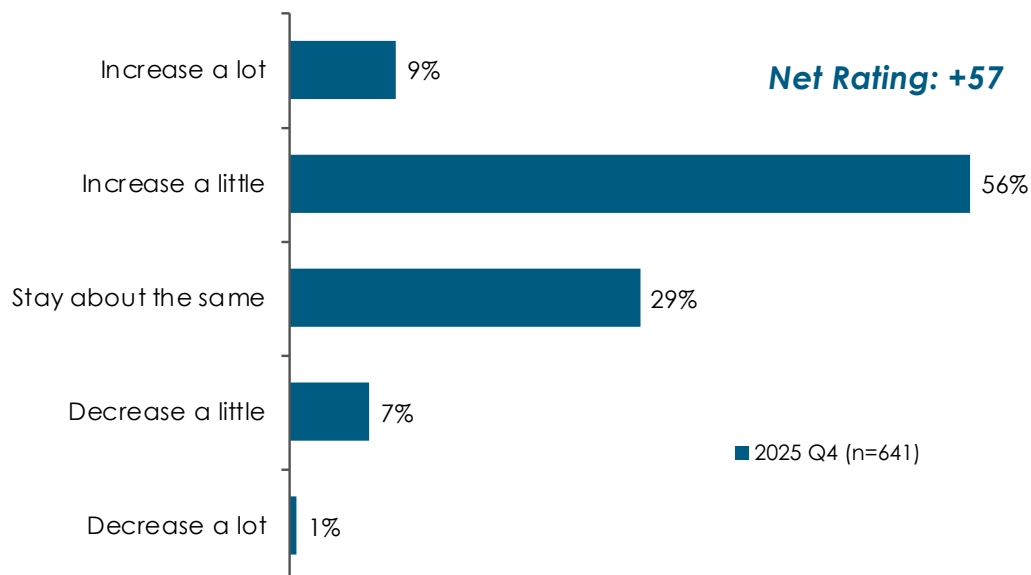
Figure 19: Backlog 12 Months from Now vs. Previous Quarters - By Region and Firm Size

<i>Future Backlog</i>	2024 Q4 (n=525)	2025 Q1 (n=579)	2025 Q2 (n=525)	2025 Q3 (n=786)	2025 Q4 (n=645)	Change vs. Previous Quarter	Change vs. Previous Year
<b>TOTAL</b>	+33	+41	+3	+21	+21	0	-12
<b>REGION</b>							
Northeast	+56	+39	0	+21	+15	-6	-41
South	+42	+45	+8	+29	+25	-4	-17
Midwest	+18	+37	-4	+15	+18	+3	0
West	+24	+42	+8	+16	+17	+1	-7
<b>FIRM SIZE</b>							
1-25	+25	+31	+3	+9	+12	+3	-13
26-50	+20	+39	-1	+16	+5	-11	-15
51-200	+38	+36	-3	+15	+24	+9	-14
201-500	+37	+42	+3	+30	+16	-14	-21
More than 500	+42	+54	+12	+33	+28	-5	-14

## Future Hiring Projections

- Sixty-five percent predict there will be an increase in hiring over the next 12 months at their firms, a Net Rating of +57.
- Future hiring sentiment increased five points from last quarter but is down three points from last year at this time. Most segments have seen decreases over the last year.
- The Northeast is the most optimistic, with a +60 Net Rating.
- Firms with more than 500 FTEs are the most optimistic about future hiring (+77) compared to other firm sizes.

Figure 20: Hiring Over the Next 12 Months





**Figure 21: Expectations for Hiring Increases Over the Next 12 Months vs Previous Quarters - By Region and Firm Size**

Status of Hiring	2024 Q4 (n=517)	2025 Q1 (n=575)	2025 Q2 (n=518)	2025 Q3 (n=774)	2025 Q4 (n=641)	Change vs. Previous Quarter	Change vs. Previous Year
<b>TOTAL</b>	<b>+60</b>	<b>+71</b>	<b>+45</b>	<b>+52</b>	<b>+57</b>	<b>+5</b>	<b>-3</b>
<b>REGION</b>							
Northeast	+69	+75	+46	+55	+60	+5	-9
South	+63	+69	+41	+55	+57	+2	-6
Midwest	+65	+76	+54	+51	+57	+6	-8
West	+46	+67	+40	+46	+55	+9	+9
<b>FIRM SIZE</b>							
1-25	+38	+40	+23	+29	+30	+1	-8
26-50	+43	+75	+46	+37	+49	+12	+6
51-200	+63	+76	+51	+53	+58	+5	-5
201-500	+82	+86	+54	+67	+61	-6	-21
More than 500	+79	+88	+53	+72	+77	+5	-2

## Inflation

- Concern over the impact of inflation remains elevated. Sixty-two percent at least somewhat agree that they are extremely concerned about the impact of inflation.
- The concern about the impact of inflation dropped two points from last quarter but is five points higher than last year at this time.

**Figure 22: Inflation Concerns**

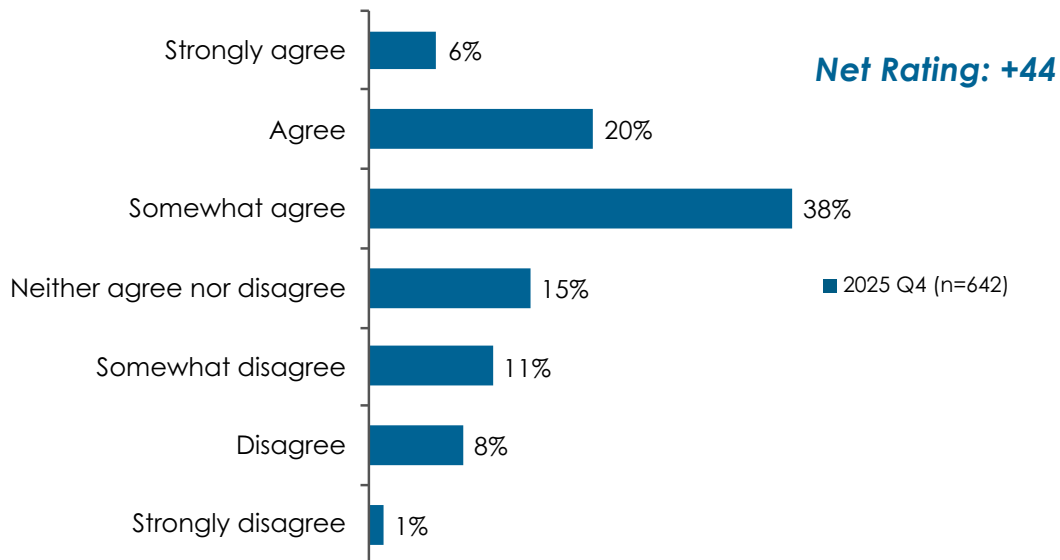
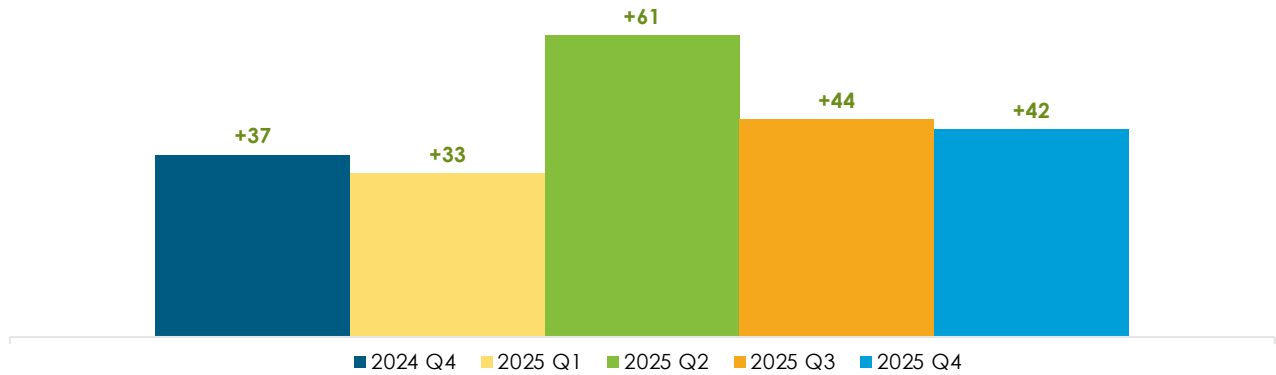


Figure 23: Inflation Concerns vs. Previous Quarters

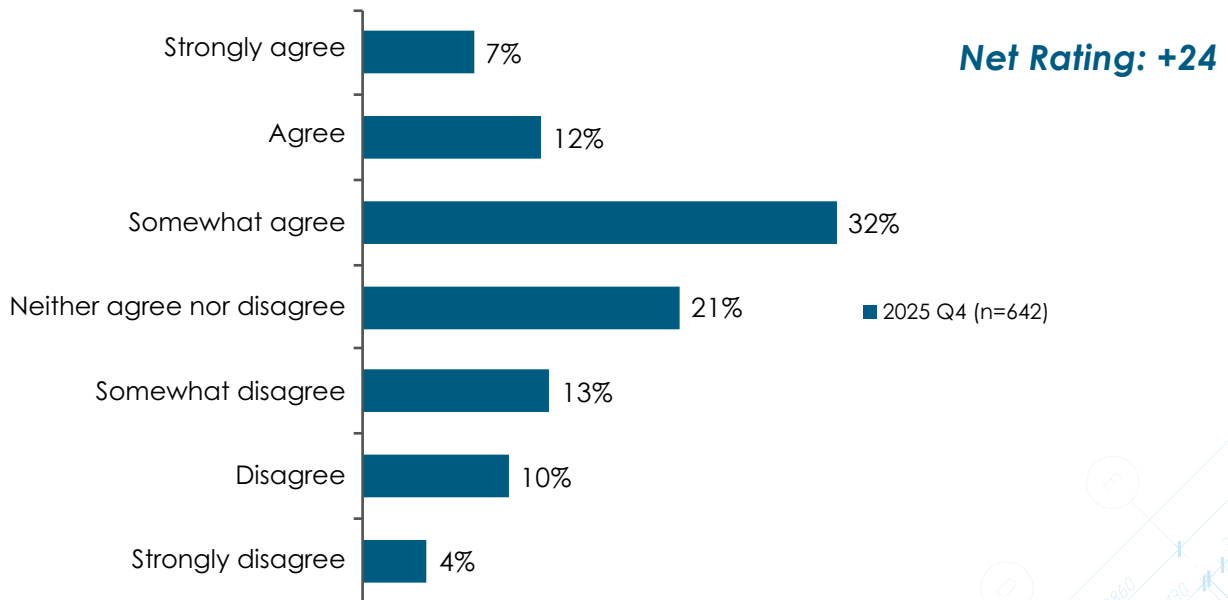
I am extremely concerned about the impact inflation will have on my firm in the coming year.



## Tariffs

- Concern over the impact of tariffs also remains elevated, although not as much as inflation. Fifty-one percent at least somewhat agree that they are extremely concerned about the impact of tariffs on their firm in the coming year, a Net Rating of +24. This is up two points from last quarter.

Figure 24: Tariff Concerns



# Likelihood of Recession in Next Six Months

- Firm leaders anticipate the likelihood of a recession in the next six months to be 45 percent.
- The perceived likelihood of a recession in the next six months increased four points from last quarter and two points from one year ago but is well below its high of 54 percent in the second quarter.

Figure 25: Likelihood of Recession in Next Six Months vs. Previous Quarter

Likelihood of Recession	2024 Q4 (n=505)	2025 Q1 (n=555)	2025 Q2 (n=517)	2025 Q3 (n=739)	2025 Q4 (n=612)	Change vs. Previous Quarter	Change vs. Previous Year
TOTAL	43%	35%	54%	41%	45%	+4	+2
REGION							
Northeast	39%	33%	52%	39%	45%	+6	+6
South	47%	34%	55%	40%	43%	+3	-4
Midwest	40%	34%	54%	42%	45%	+3	+5
West	42%	38%	54%	43%	46%	+3	+4
FIRM SIZE							
1-25	48%	40%	55%	45%	49%	+4	+1
26-50	45%	37%	56%	42%	49%	+7	+4
51-200	41%	33%	53%	40%	42%	+2	+1
201-500	41%	34%	51%	39%	42%	+3	+1
More than 500	38%	32%	54%	39%	43%	+4	+5

# HOT TOPICS

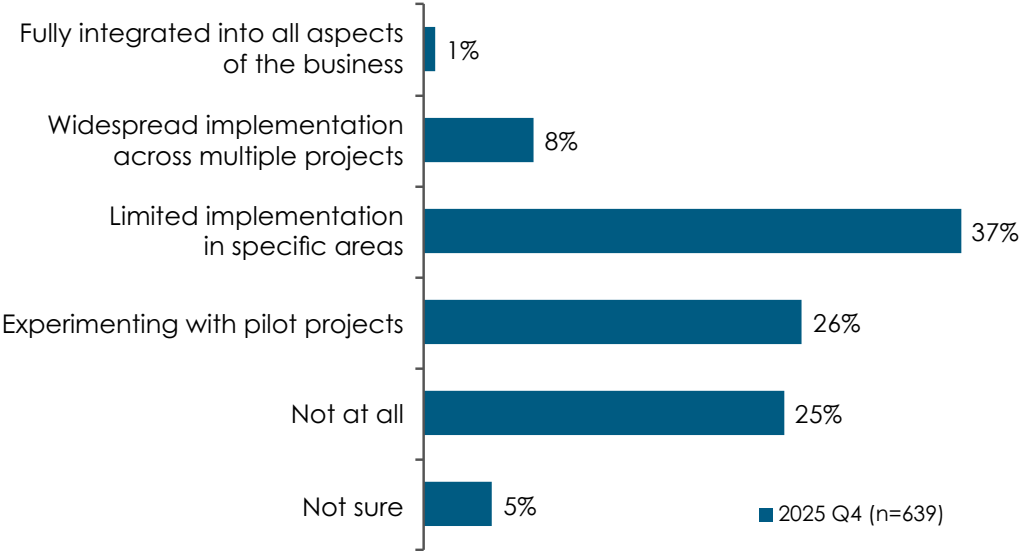
Artificial Intelligence (AI) adoption remains in the early stages across engineering firms, with most organizations experimenting through limited implementation or pilot programs in operations, sales/marketing, and engineering/design functions. Widespread integration is still rare.

The workforce data shows a meaningful reliance on H-1B visa holders: nearly half of firms employ at least one, with an average of 26 H-1B workers per firm. In addition, 62 percent of firms support expanding H-1B availability to help address talent shortages. However, nearly all respondents (96%) say they would be less likely to hire someone requiring an H-1B if faced with a \$100,000 one-time fee, indicating that cost barriers could significantly constrain access to global talent.

## Artificial Intelligence (AI) Implementation

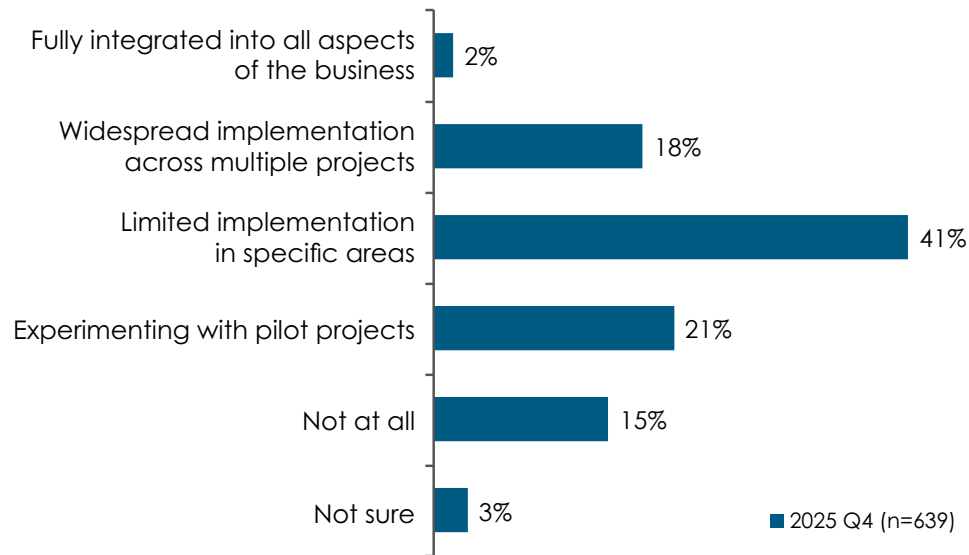
- AI in Operations: 25 percent have not implemented AI at all. Most firms have either limited implementation (37%) or are experimenting with pilot projects (26%). Very few firms have widespread or fully integrated AI.

Figure 26: Area of AI implementation (Operations)



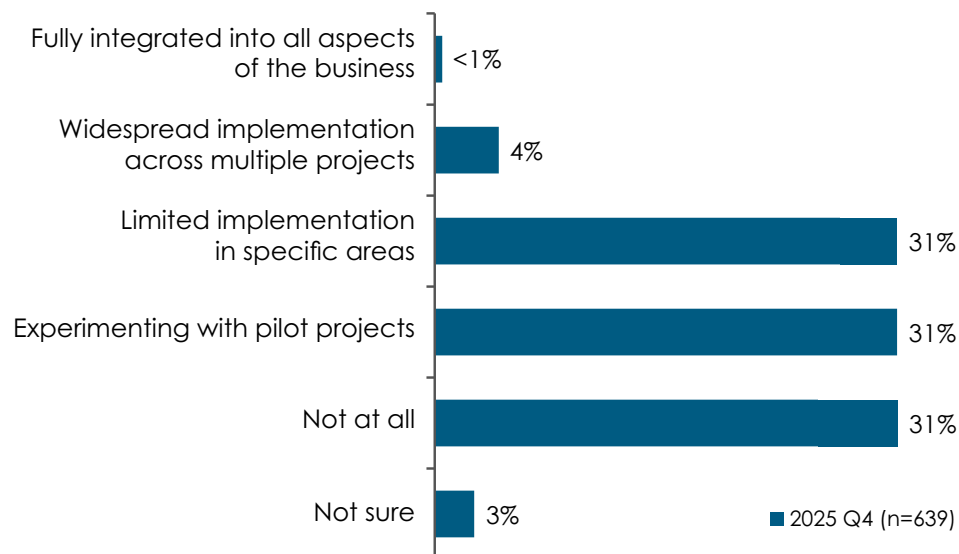
- AI in Sales and Marketing: 15 percent have not implemented AI at all. Most firms have either limited implementation (41%) or are experimenting with pilot projects (21%). Very few firms have widespread or fully integrated AI.

**Figure 27: Area of AI implementation (Sales and Marketing)**



- AI in Design and Consulting: 31 percent have not implemented AI at all. Most firms have either limited implementation (31%) or are experimenting with pilot projects (31%). Very few firms have widespread or fully integrated AI.

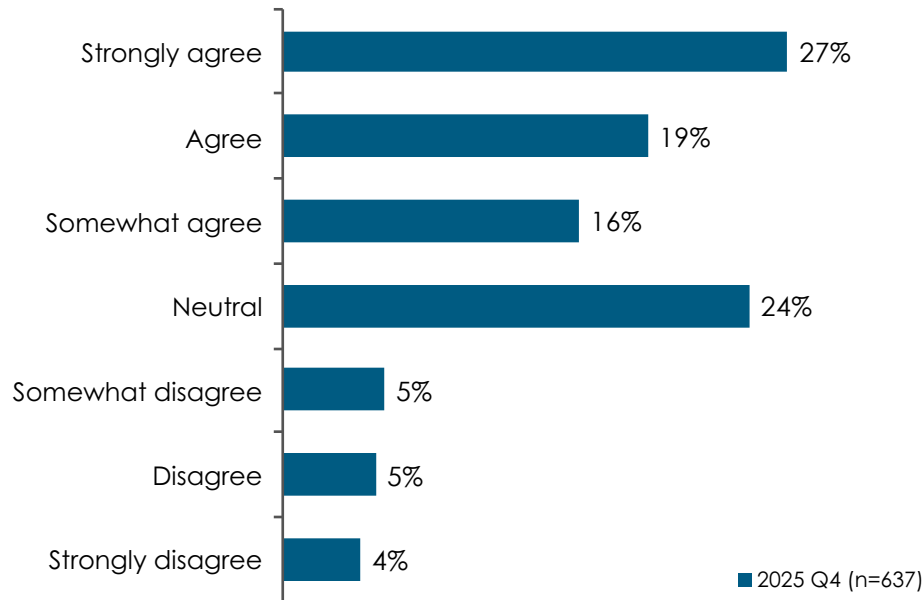
**Figure 28: Area of AI implementation (Engineering Design and Consulting)**



## H-1B Visa

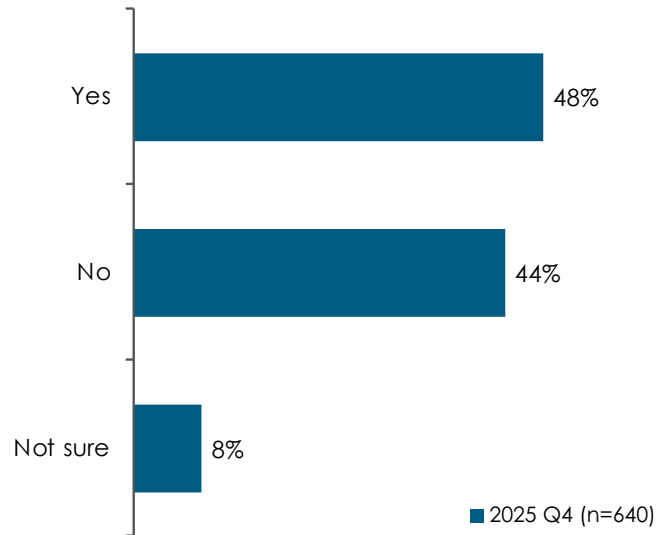
- Sixty-two percent of firm leaders agree that they would like to see the federal government greatly expand the number of H-1B visas for the engineering and design services industry.
- Seventy-one percent of firms with more than 500 FTEs would like to see federal government expand the H-1B program.
- By contrast, 47 percent of the smallest firms (25 or fewer FTEs) agree that the federal government should expand this visa program.

Figure 29: H-1B Expansion



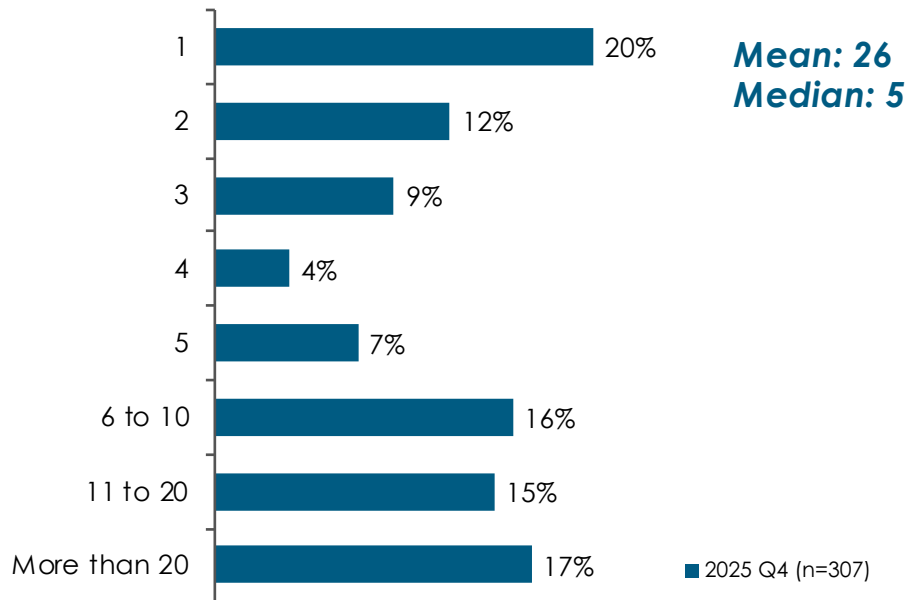
- Nearly half of respondents (48%) say their firm employs someone who holds an H-1B visa.
- Seventy-three percent of respondents at firms with more than 500 FTEs employ at least one individual with an H-1B visa.
- By contrast, only 24 percent of respondents at the smallest firms (25 or fewer) employ any H-1B visa holders.

Figure 30: H-1B Visa Employees



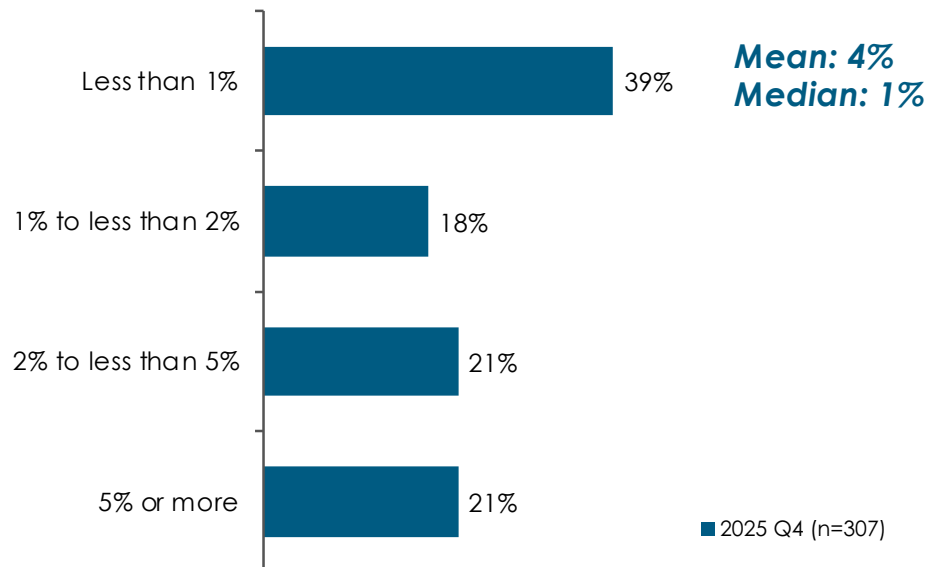
- Respondents indicate their firms employ an average of 26 H-1B visa holders. Not surprisingly, larger firms have more employees with H-1B visas.
- Among the smallest firms (25 or fewer FTEs), the average is two current employees with an H-1B visa.
- Among the largest firms (more than 500 FTEs), the average is 55 employees with an H-1B visa.

Figure 31: H-1B Visa Employees (Total)



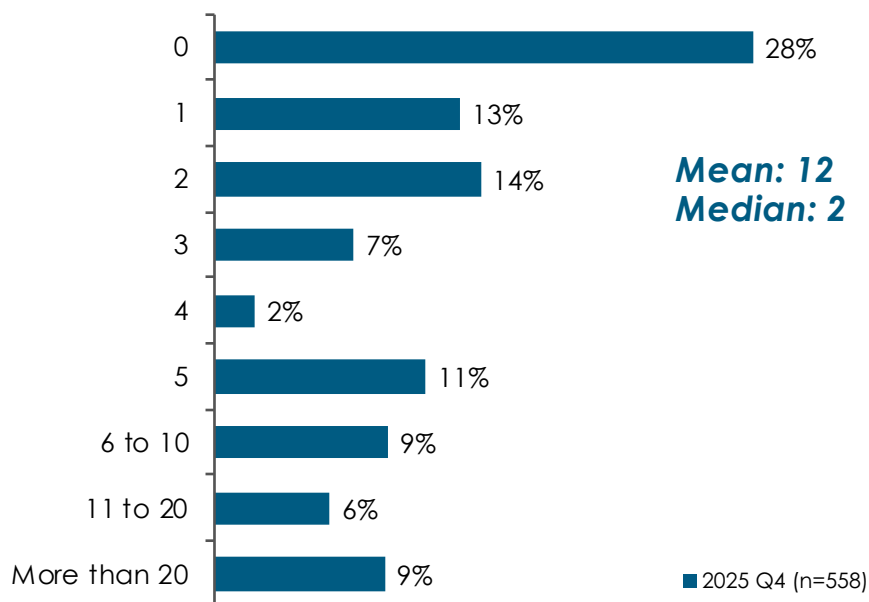
- H-1B visa holders account for an average of four percent of all firm employees.
- Among the smallest firms (25 or fewer FTEs), the average is 15 percent with an H-1B visa.
- Among the largest firms (more than 500 FTEs), the average is one percent with an H-1B visa.

**Figure 32: H1B Visa Holders as a percent of All FTEs**



- All else being equal, respondents say their firms would hire an average of 12 H-1B visa holders to fully staff their firms if there were no restrictions.
- The smallest firms (25 or fewer FTEs) would hire an average of 10 H-1B visa holders.
- The largest firms (more than 500 FTEs) would hire an average of 29 H-1B visa holders.

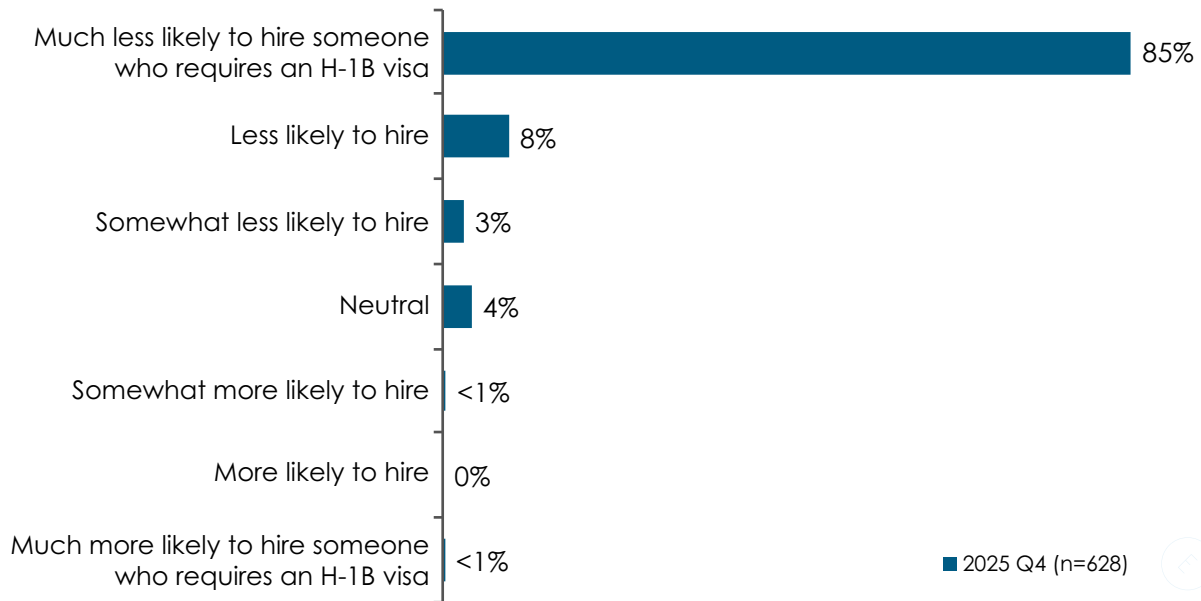
**Figure 33: Potential H-1B Hires**





- Ninety-six percent of respondents say their firms are less likely to hire someone who requires an H-1B visa if it incurs a one-time fee of \$100,000 per individual. This is consistent across all firm sizes.

**Figure 34: Likelihood to Hire Individuals Requiring H-1B Visa**



# METHODOLOGY

The Institute for Association and Nonprofit Research (IFANR) recruited individuals from among the database list of members provided by the ACEC Research Institute. Data collection occurred between October 28 and November 10, 2025. During the fielding period, the U.S. was experiencing a federal government shutdown which ended November 12, 2025.

A total of 9,623 invitations were emailed, although 2,893 bounced and 37 opted out, resulting in a total of 6,693 potential respondents. Individuals who did not respond to the first email were sent up to three follow-up reminders. 710 individuals completed the survey for an overall response rate of 11 percent.

Throughout this report, meaningful statistically significant differences are noted for various subgroups, including geographic region and firm size.

NOTE: Throughout this report, “Net Ratings” are shown on many graphs to quantify the sentiment of respondents. The Net Rating is calculated by subtracting the negative ratings from the positive ratings. Therefore, a positive Net Rating indicates overall sentiment is optimistic while a negative Net Rating indicates an overall pessimistic sentiment. The higher the numeric value the stronger the sentiment (either optimistic or pessimistic).

## STATISTICAL NOTES

Due to rounding, not all graphs total 100 percent.

Statistically significant differences are evaluated at a 95 percent confidence interval.

There is no margin of sampling error as this was a census of all executive-level individuals at member firms in the ACEC database.

Although every effort was taken to minimize survey bias, there is no way to eliminate all sources of potential bias. Sources of potential bias include, but are not limited to, the following:

- Non-response bias
- Confounding bias
- Question wording bias
- Question order bias
- Habituation
- Sponsor bias
- Confirmation bias

The ACEC Research Institute provides the engineering industry with cutting edge research, trend data, and economic analysis to help firm owners make decisions and delivers thought leadership that advances engineering's essential value to society.

**The ACEC Research Institute wishes to extend its sincere appreciation to its generous contributors.**

*As of December 2025*

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