

ENGINEERING BUSINESS SENTIMENT

Q2
2026

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EXECUTIVE SUMMARY

Engineering firms continue to operate from a position of strength, supported by durable backlogs and steady firm-level performance. However, the broader environment has become more uncertain this quarter, with a notable decline in confidence in the U.S. economy and a shift toward a more cautious outlook.

Current conditions remain solid. Firms report strong confidence in their own financial performance and the industry overall, even as sentiment toward the broader economy has weakened. Market sentiment continues to be positive across most industry sectors, though some are much stronger than others. Labor constraints persist but are gradually easing, allowing firms more flexibility, though unfilled roles still limit full capacity utilization.

Forward-looking expectations have softened. While firms remain optimistic about their own performance and expect continued growth, confidence in the broader economy has turned negative. Concerns about political uncertainty remain elevated, and issues such as inflation, rising costs, recession risk, and geopolitical tensions have re-emerged as key drivers of caution. As a result, firms are planning for continued expansion, but at a more measured pace.

Operationally, the environment is shifting. Workforce pressures are easing compared to prior periods, with fewer firms turning down work due to staffing shortages and some improvement in recruitment conditions. Firms are responding by becoming more selective in the projects they pursue and placing greater emphasis on higher-value work. At the same time, firms are experiencing significant cost increases with their healthcare insurance premiums.

Strategic themes emerging this quarter:

Economic sentiment weakens: Confidence in the broader economy declines, introducing a more cautious tone.

Growth continues, but moderates: Firms expect expansion, though at a slower and more measured pace.

Labor constraints ease slightly: Hiring challenges persist but are less acute than in prior periods.

Cost pressures are evident: Rising healthcare costs are a significant concern.

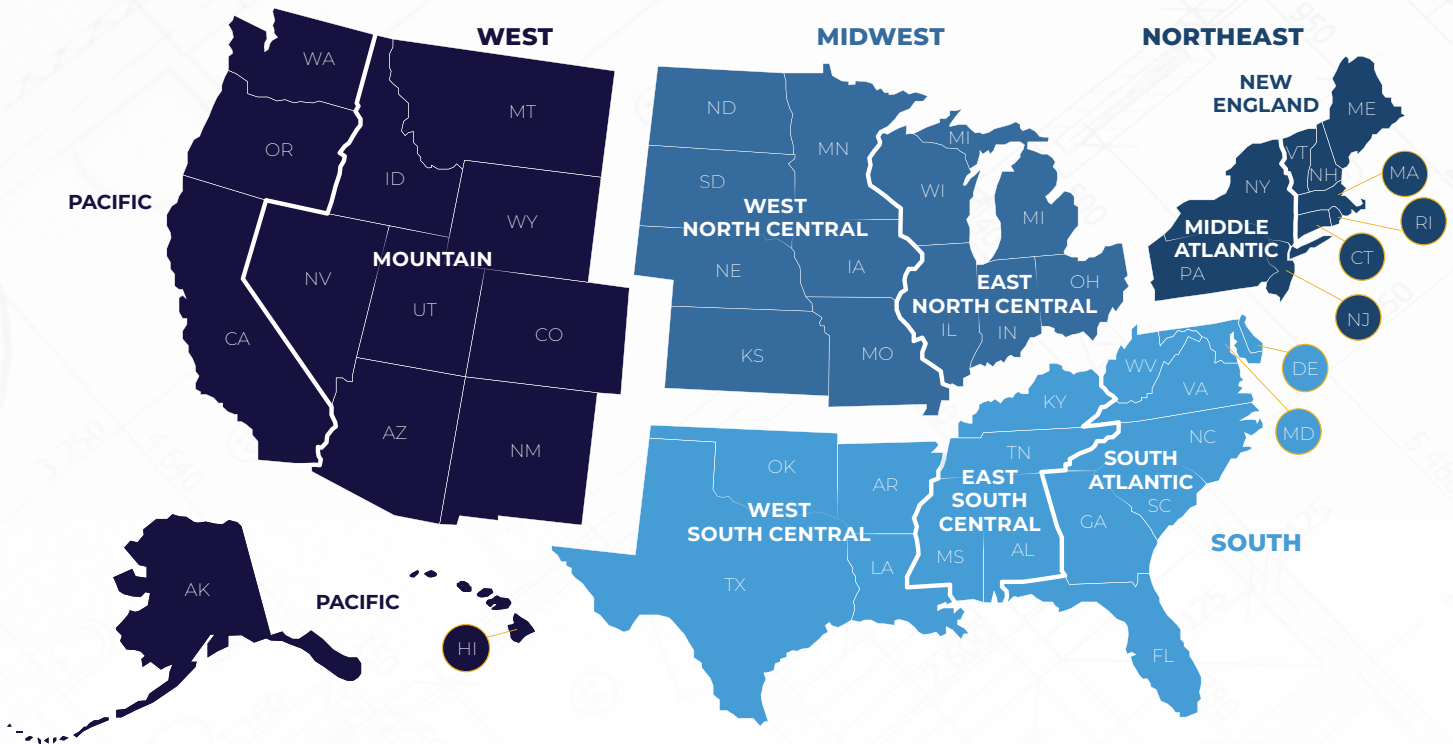
Project selectivity increases: Firms are prioritizing higher-value work and managing capacity more deliberately.

Bottom line: The sector remains fundamentally strong, but the operating environment is becoming more complex. Firms are shifting from a growth posture driven by demand and labor constraints to one defined by cautious expansion, cost management, and strategic selectivity in response to rising uncertainty.

DEMOGRAPHICS

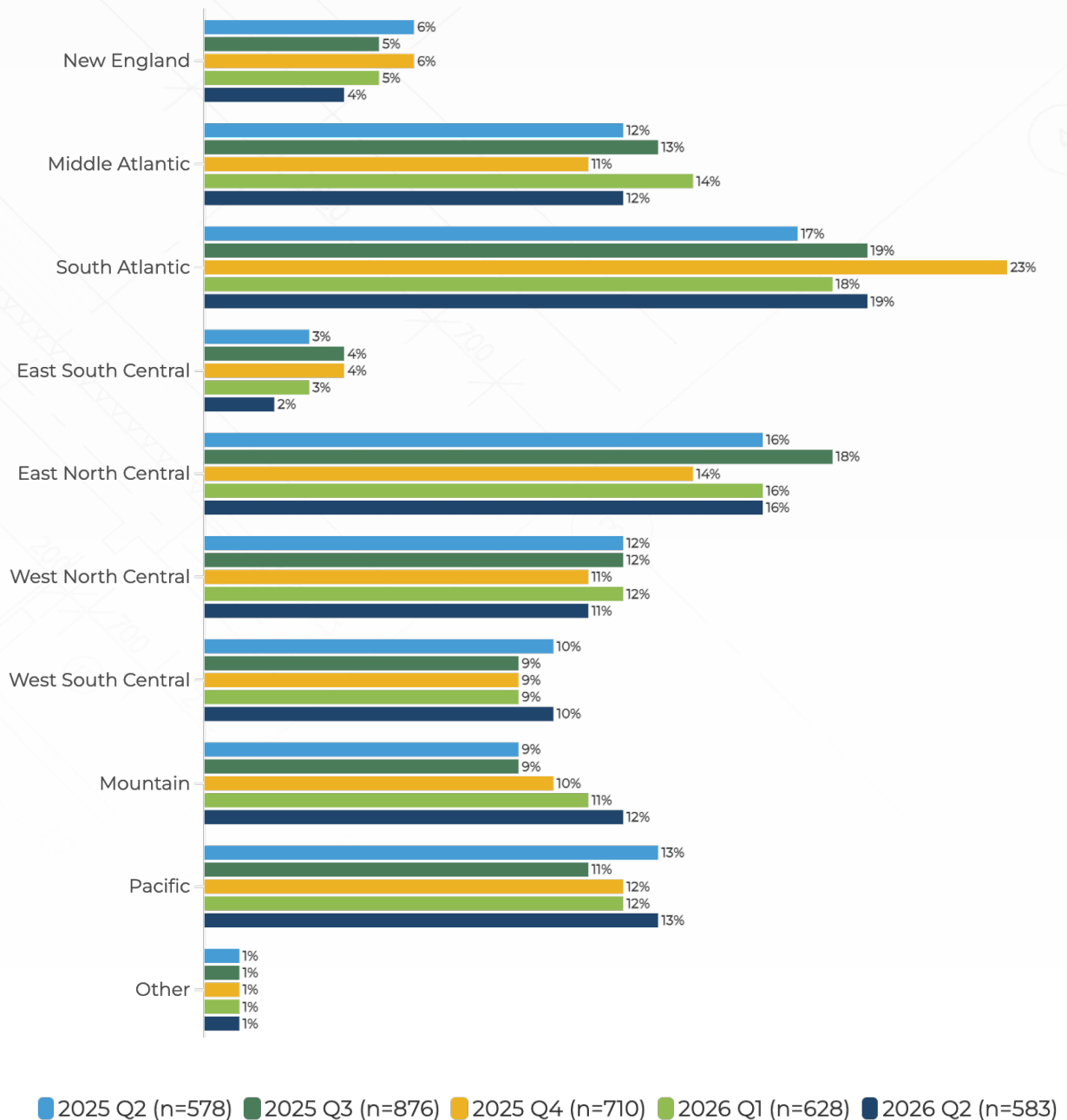
For reference, the ACEC Research Institute uses the U.S. Census Bureau definition of geographic regions seen in Figure 1 below.

FIGURE 1: UNITED STATES CENSUS REGIONS



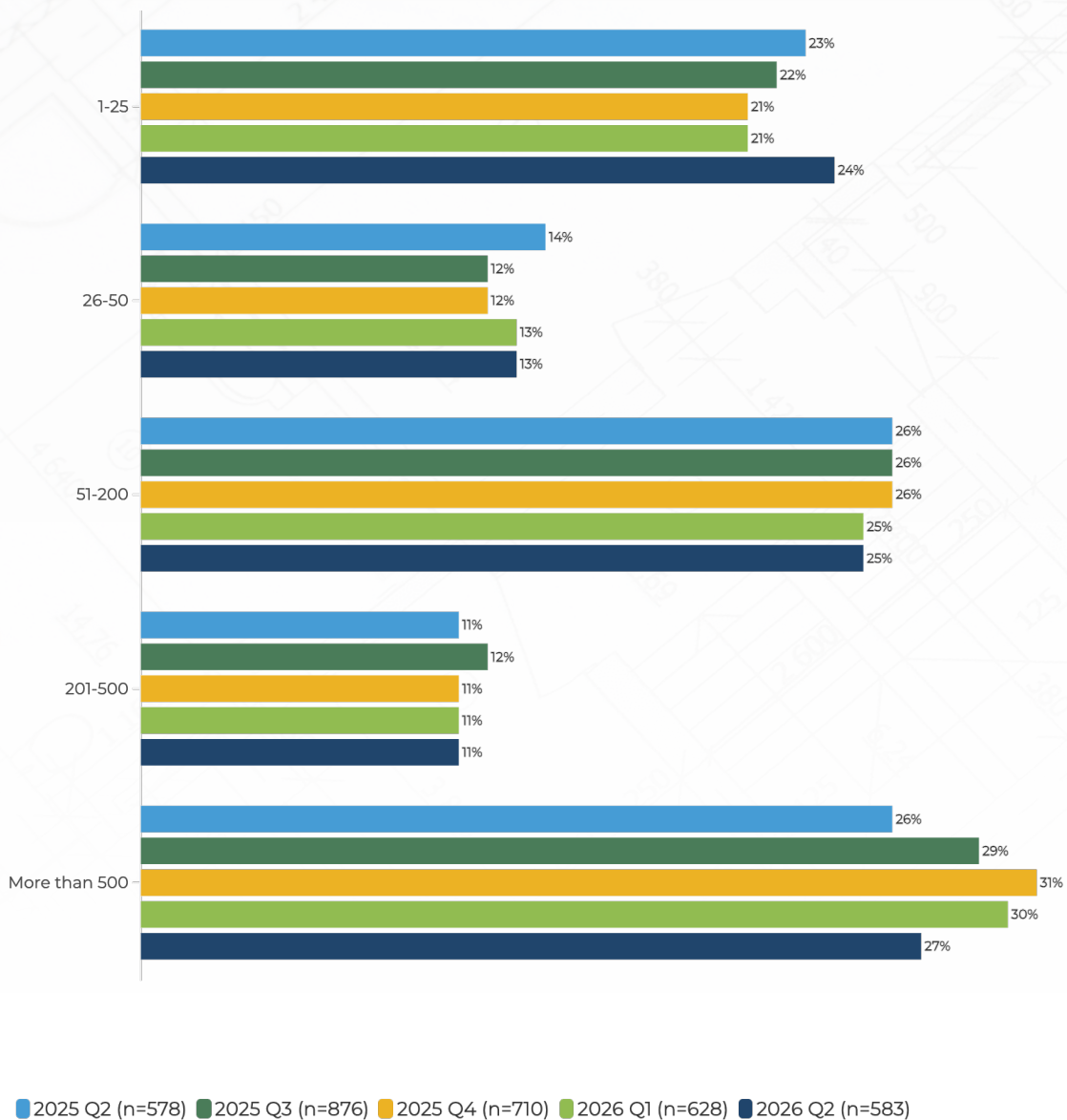
Respondents' firms are widely dispersed across the United States, though a few respondents (Other) indicate their firm is headquartered outside the U.S. These results are statistically similar to previous quarters.

FIGURE 2: LOCATION OF ORGANIZATION HEADQUARTERS



The median number of full-time employees at respondents' firms is 102. Last quarter, the median was 120 full-time employees.

FIGURE 3: NUMBER OF FULL-TIME EQUIVALENTS AT FIRM



CURRENT BUSINESS CONDITIONS

Engineering firms continue to operate from a position of strength, though momentum has softened. Confidence in firm performance and the industry remains high, but sentiment toward the broader U.S. economy has declined notably, introducing a more cautious macro backdrop.

Labor dynamics remain a limiting factor. While hiring conditions have improved at the margins, unfilled roles continue to constrain firms' ability to fully capitalize on demand.

Key shifts this quarter:

Economic confidence has weakened, reversing last quarter's improvement.

Market performance is positive in every sector, though some are much stronger than others.

Backlogs continue to provide a stable operational foundation.

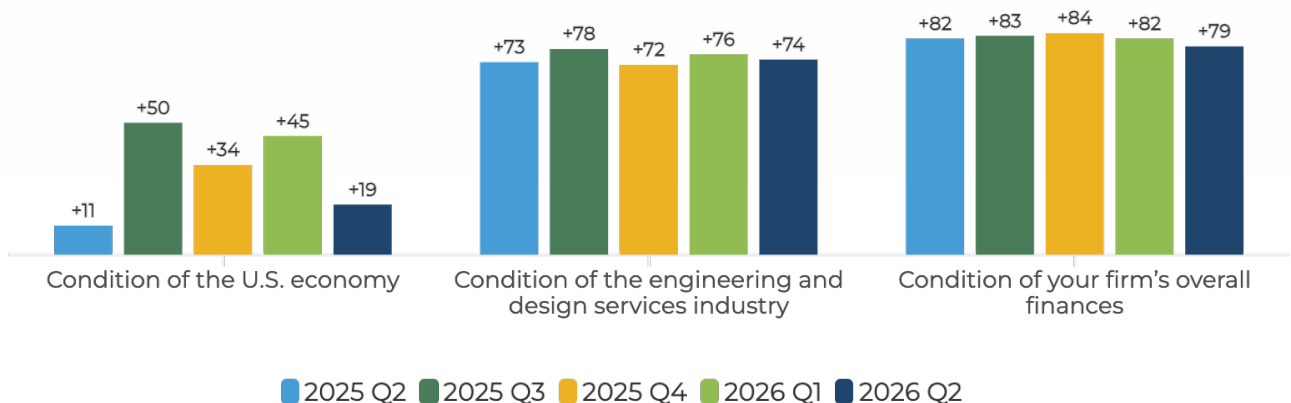
Labor pressures are easing slightly, but capacity constraints persist.

Bottom line: Strong fundamentals remain intact, but declining economic confidence is creating a more cautious tone. Firms are stable but not accelerating.

CURRENT U.S. ECONOMY, INDUSTRY AND FIRM SENTIMENT

Current sentiment is positive. The Net Ratings for firms' finances (+79) and for the industry (+74) are high, while the Net Rating for the U.S. economy is much less positive at +19.

FIGURE 4: CURRENT ECONOMIC SENTIMENT VS. PREVIOUS QUARTERS



Sentiment about the U.S. economy declined compared to the previous quarter, decreasing 26 points to +19. This declining optimism is seen across all segments.

FIGURE 5: CURRENT CONDITION OF U.S. ECONOMY VS. PREVIOUS QUARTERS – BY REGION AND FIRM SIZE

Condition of the U.S. Economy	2025 Q2 (n=565)	2025 Q3 (n=867)	2025 Q4 (n=695)	2026 Q1 (n=617)	2026 Q2 (n=569)	Change vs. Previous Quarter	Change vs. Previous Year
TOTAL	+11	+50	+34	+45	+19	-26	+8
REGION							
Northeast	+9	+61	+34	+51	+25	-26	+16
South	+12	+54	+38	+46	+17	-29	+5
Midwest	+16	+43	+40	+52	+23	-29	+7
West	+5	+43	+23	+30	+13	-17	+8
FIRM SIZE							
1-25	+8	+47	+27	+35	+15	-20	+7
26-50	+7	+42	+15	+33	-2	-35	-9
51-200	+6	+44	+37	+53	+19	-34	+13
201-500	+20	+48	+50	+47	+18	-29	-2
More than 500	+18	+61	+39	+47	+33	-14	+15

CURRENT INDUSTRY SECTOR SENTIMENT

Current sentiment remains very optimistic within most market sectors, with sentiment strongest in Data Centers (+87) and Energy and Utilities (+80). A few sectors declined quarter-over-quarter and year-over-year.

FIGURE 6: CURRENT INDUSTRY SENTIMENT BY SECTOR VS. PREVIOUS QUARTERS

Current Industry Sector Sentiment	2025 Q2 (n=197-444)	2025 Q3 (n=275-678)	2025 Q4 (n=258-551)	2026 Q1 (n=225-484)	2026 Q2 (n=191-444)	Change vs. Previous Quarter	Change vs. Previous Year
Federal/Military, State and Local Government Buildings	+34	+47	+39	+48	+54	+6	+20
Science and Technology	+47	+59	+56	+57	+65	+8	+18
Convention Centers, Sports Facilities, and Cultural Facilities	+32	+40	+41	+42	+46	+4	+14
Education (K-12 and Higher Education)	+37	+42	+41	+39	+49	+10	+12
Justice (Courthouses and Corrections)	+20	+26	+27	+30	+32	+2	+12
Data Centers	+78	+85	+86	+89	+87	-2	+9
Healthcare Facilities	+56	+58	+62	+60	+65	+5	+9
Commercial Real Estate (Office, Hotel, Retail, and Multifamily Residential)	+13	+23	+25	+21	+21	0	+8
Energy and Utilities	+74	+73	+79	+78	+80	+2	+6
Industrial and Manufacturing Facilities	+57	+61	+60	+59	+57	-2	0
Telecommunications	+53	+57	+50	+52	+52	0	-1
Transportation – Airports	+71	+75	+67	+71	+70	-1	-1
Water/Wastewater	+76	+78	+74	+73	+75	+2	-1
Residential – Land Development	+28	+29	+30	+24	+24	0	-4
Transportation – Roads and Bridges	+70	+76	+67	+69	+65	-4	-5
Transportation – Transit (Rail, BRT)	+52	+55	+47	+50	+45	-5	-7

CURRENT BACKLOG

Nearly half of respondents (49%) report current backlogs of one year or more, with the median backlog remaining steady at 11 months. As typical, backlogs increase with firm size.

FIGURE 7: CURRENT BACKLOG VS. PREVIOUS QUARTERS – BY REGION AND FIRM SIZE

Current Backlog	2025 Q2 (n=539)	2025 Q3 (n=788)	2025 Q4 (n=645)	2026 Q1 (n=580)	2026 Q2 (n=552)	Change vs. Previous Quarter	Change vs. Previous Year
TOTAL	10	12	11	11	11	0	+1
REGION							
Northeast	12	12	12	12	12	0	0
South	10	12	12	10	12	+2	+2
Midwest	11	12	11	11	11	0	0
West	10	10	9	9	10	+1	0
FIRM SIZE							
1-25	6	6	6	6	6	0	0
26-50	10	12	10	9	9	0	-1
51-200	11	12	11	10	12	+2	+1
201-500	12	12	12	12	12	0	0
More than 500	12	13	12	13	12	-1	0

CURRENT OPEN POSITIONS

Eighty-four percent of firms still have at least one opening, a slight decrease of four points from last quarter. Last year at this time, it was 87 percent. The median number of open positions remained steady at five.

FIGURE 8: CURRENT NUMBER OF OPEN POSITIONS VS. PREVIOUS QUARTERS

Open Positions	2025 Q2 (n=528)	2025 Q3 (n=767)	2025 Q4 (n=625)	2026 Q1 (n=570)	2026 Q2 (n=551)	Change vs. Previous Quarter	Change vs. Previous Year
TOTAL	5	5	6	5	5	0	0
REGION							
Northeast	12	10	12	12	20	+8	+8
South	4	4	6	5	3	-2	-1
Midwest	9	8	10	7	8	+1	-1
West	2	3	3	2	2	0	0
FIRM SIZE							
1-25	1	1	1	1	1	0	0
26-50	2	2	2	2	2	0	0
51-200	5	5	5	5	5	0	0
201-500	20	20	20	20	20	0	0
More than 500	90	100	100	100	100	0	+10

On average, seven percent of positions remain unfilled, consistent with last quarter and last year at this time. Nineteen percent of firms report that 10 percent or more of positions are unfilled.

FIGURE 9: OPEN POSITIONS AS PERCENTAGE OF OVERALL FTEs

Open Positions	2025 Q2 (n=528)	2025 Q3 (n=767)	2025 Q4 (n=625)	2026 Q1 (n=570)	2026 Q2 (n=551)	Change vs. Previous Quarter	Change vs. Previous Year
TOTAL	7%	8%	7%	7%	7%	0	0
REGION							
Northeast	7%	6%	6%	6%	5%	-1	-2
South	8%	8%	7%	8%	7%	-1	-1
Midwest	9%	7%	8%	7%	7%	0	-2
West	7%	9%	8%	6%	6%	0	-1
FIRM SIZE							
1-25	12%	13%	12%	12%	10%	-2	-2
26-50	6%	7%	7%	6%	5%	-1	-1
51-200	6%	6%	6%	6%	6%	0	0
201-500	7%	6%	5%	5%	6%	+1	-1
More than 500	6%	6%	5%	6%	6%	0	0

FUTURE BUSINESS CONDITIONS

Forward-looking sentiment has weakened and become more uneven. Confidence in firm performance remains solid, and the industry outlook is still positive, but expectations for the broader economy have turned negative.

Despite this, firm-level indicators still point to growth, though at a slower pace. Expectations for backlog expansion and hiring remain positive but have softened, suggesting more measured expansion. Growth expectations continue to be positive in the majority of industry sectors, though most also declined relative to last quarter.

Key shifts this quarter:

U.S. economic outlook has deteriorated, moving back in to negative territory.

Political uncertainty remains the dominant concern.

Inflation and cost pressures have re-emerged.

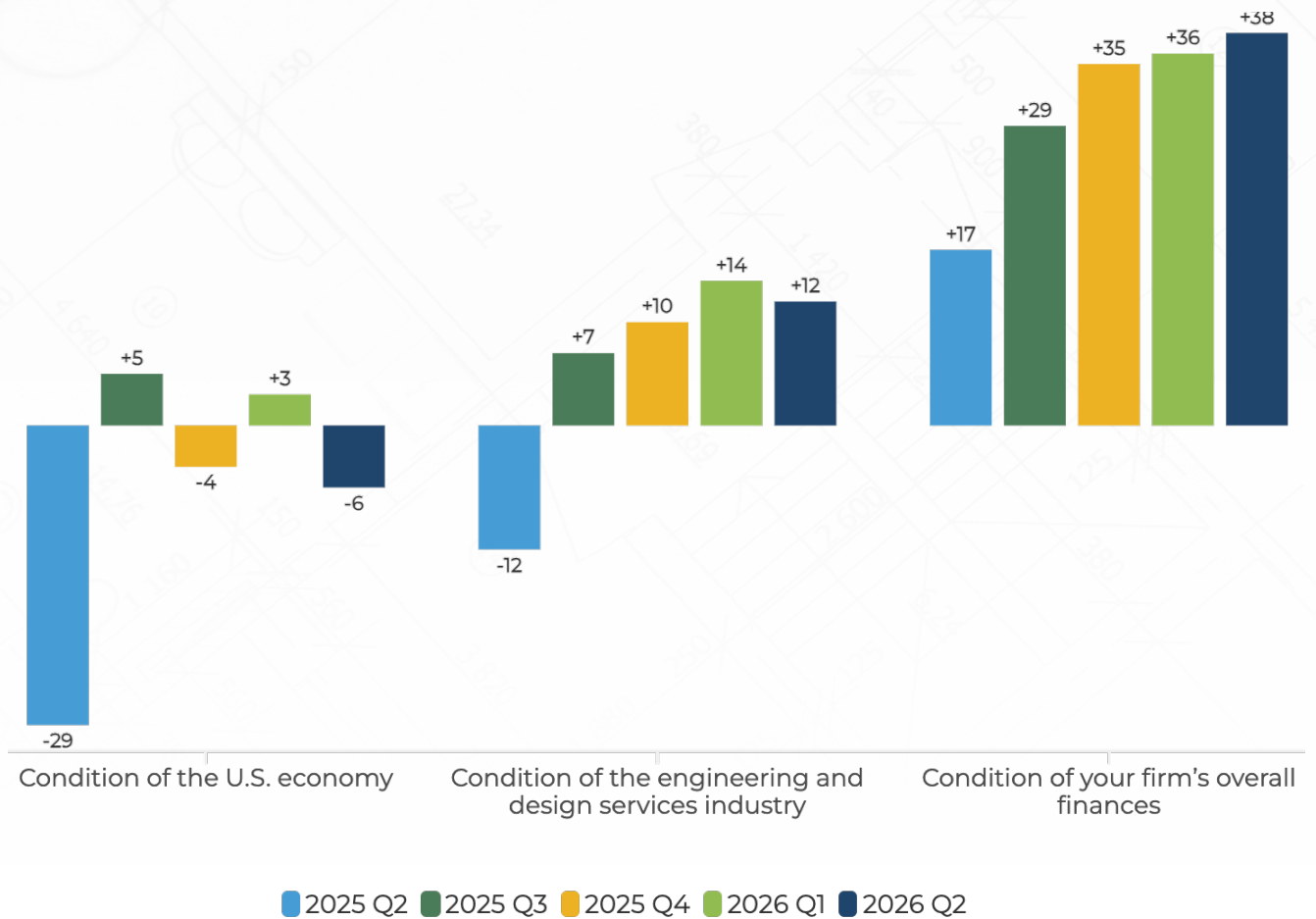
Recession concerns and geopolitical tensions are increasing.

Bottom line: Firms are still planning for growth, but with increased caution. Confidence is shifting away from macro conditions and toward internal performance.

FUTURE U.S. ECONOMY, INDUSTRY AND FIRM SENTIMENT

Future sentiment is mixed. The condition of firms' finances remains the strongest (+38), but the condition of the U.S. economy has fallen into negative territory (-6). The condition of the engineering and design services industry remains positive at +12, down slightly from the last quarter.

FIGURE 10: ECONOMIC SENTIMENT 12 MONTHS FROM NOW VS. PREVIOUS QUARTERS



The outlook of the U.S. economy across most segments fell from the prior quarter. However, all segments have improved by large margins from last year at this time when President Trump had just announced sweeping “reciprocal” tariffs on all foreign imports.

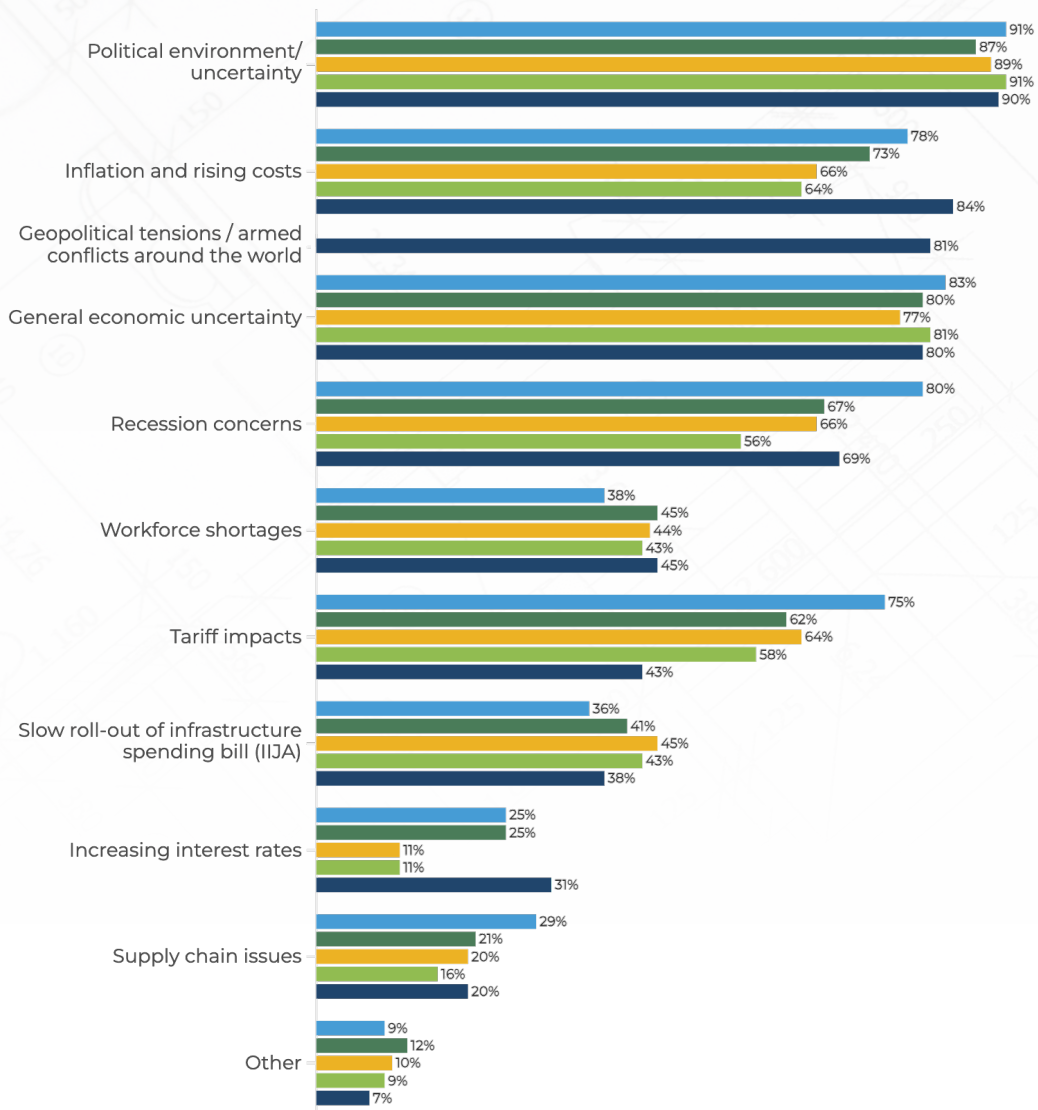
FIGURE 11: CONDITION OF U.S. ECONOMY 12 MONTHS FROM NOW VS. PREVIOUS QUARTERS – BY REGION AND FIRM SIZE

Condition of the U.S. Economy	2025 Q2 (n=521)	2025 Q3 (n=765)	2025 Q4 (n=633)	2026 Q1 (n=566)	2026 Q2 (n=536)	Change vs. Previous Quarter	Change vs. Previous Year
TOTAL	-29	+5	-4	+3	-6	-9	+23
REGION							
Northeast	-33	+8	-9	+12	+3	-9	+36
South	-17	+21	+18	+10	+10	0	+27
Midwest	-32	-9	-19	-5	-16	-11	+16
West	-41	-1	-14	-4	-18	-14	+23
FIRM SIZE							
1-25	-33	+2	-14	+1	-9	-10	+24
26-50	-43	+2	-7	0	+10	+10	+53
51-200	-23	+7	-1	+10	-8	-18	+15
201-500	-19	-3	+1	-1	-3	-2	+16
More than 500	-29	+12	+1	+1	-9	-10	+20

REASONS FOR NEGATIVE ECONOMIC SENTIMENT 12 MONTHS FROM NOW

Political environment/uncertainty (90%) continues to fuel negative future sentiment. Inflation and rising costs (84%) and recession concerns (69%) also re-emerged as top reasons for negative sentiment. Geopolitical tensions (81%), asked for the first time, and general economic uncertainty (80%) are also major factors.

FIGURE 12: REASONS FOR ECONOMIC SENTIMENT 12 MONTHS FROM NOW



■ 2025 Q2 (n=320) ■ 2025 Q3 (n=310) ■ 2025 Q4 (n=262) ■ 2026 Q1 (n=211) ■ 2026 Q2 (n=215)

FUTURE INDUSTRY SECTOR SENTIMENT

Future industry sector sentiment has increased from one year ago across most sectors. Sentiment remains highest in Energy and Utilities (+47) and Data Centers (+33), while it is the weakest in Justice and Convention Centers, Sports Facilities, and Cultural Facilities (both -5). Federal/Military, State and Local Government Buildings has seen a +53 improvement from last year.

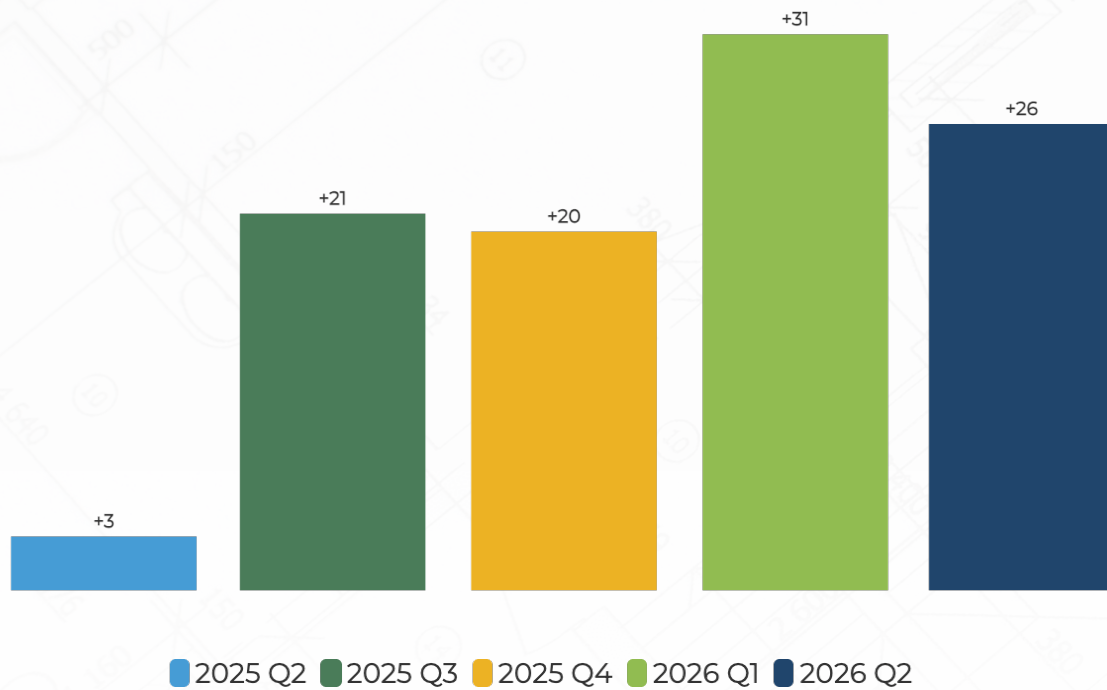
**FIGURE 13: INDUSTRY SENTIMENT BY SECTOR
12 MONTHS FROM NOW VS. PREVIOUS QUARTERS**

Future Industry Sector Sentiment	2025 Q2 (n=228-430)	2025 Q3 (n=311-639)	2025 Q4 (n=277-528)	2026 Q1 (n=252-466)	2026 Q2 (n=225-422)	Change vs. Previous Quarter	Change vs. Previous Year
Federal/Military, State and Local Government Buildings	-29	+7	+10	+18	+24	+6	+53
Healthcare Facilities	-5	+8	+21	+17	+23	+6	+28
Commercial Real Estate (Office, Hotel, Retail, and Multifamily Residential)	-23	-1	+8	+6	0	-6	+23
Convention Centers, Sports Facilities and Cultural Facilities	-28	-3	-3	-1	-5	-4	+23
Education (K-12 and Higher Education)	-22	-10	-1	0	0	0	+22
Justice (Courthouses and Corrections)	-25	-6	-4	-1	-5	-4	+20
Residential – Land Development	-18	+3	+14	+16	+2	-14	+20
Science and Technology	-5	+10	+16	+16	+14	-2	+19
Energy and Utilities	+30	+35	+47	+49	+47	-2	+17
Transportation – Transit (Rail, BRT)	-10	+8	+7	+10	+6	-4	+16
Transportation – Airports	+6	+32	+25	+28	+20	-8	+14
Water/Wastewater	+16	+27	+32	+33	+29	-4	+13
Transportation – Roads and Bridges	+10	+26	+27	+22	+17	-5	+7
Telecommunications	+6	+18	+22	+15	+11	-4	+5
Data Centers	+36	+52	+53	+50	+33	-17	-3
Industrial and Manufacturing Facilities	+24	+27	+31	+27	+18	-9	-6

FUTURE BACKLOG

Forty-four percent believe their firms will see a higher backlog of projects 12 months from now, resulting in a Net Rating of +26, down five points from the previous quarter. Future backlog sentiment is 23 points higher compared to last year at this time.

FIGURE 14: BACKLOG 12 MONTHS FROM NOW – NET RATING TREND



FUTURE HIRING PROJECTIONS

Sixty-four percent predict hiring to increase over the next 12 months, resulting in a Net Rating of +57, down three points from last quarter but up twelve points year-over-year. Most segments show year-over-year improvements.

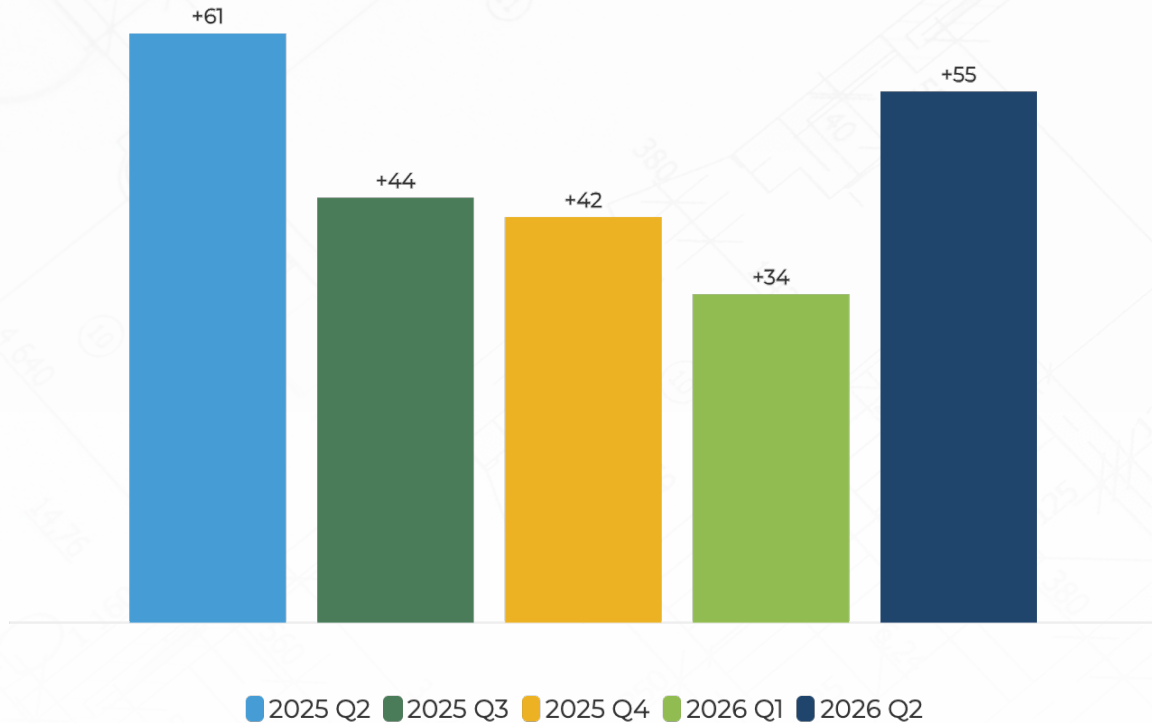
FIGURE 15: EXPECTATIONS FOR HIRING INCREASES OVER THE NEXT 12 MONTHS VS PREVIOUS QUARTERS – BY REGION AND FIRM SIZE

Status of Hiring	2025 Q2 (n=518)	2025 Q3 (n=774)	2025 Q4 (n=641)	2026 Q1 (n=576)	2026 Q2 (n=551)	Change vs. Previous Quarter	Change vs. Previous Year
TOTAL	+45	+52	+57	+60	+57	-3	+12
REGION							
Northeast	+46	+55	+60	+76	+69	-7	+23
South	+41	+55	+57	+56	+60	+4	+19
Midwest	+54	+51	+57	+65	+58	-7	+4
West	+40	+46	+55	+50	+46	-4	+6
FIRM SIZE							
1-25	+23	+29	+30	+31	+39	+8	+16
26-50	+46	+37	+49	+49	+42	-7	-4
51-200	+51	+53	+58	+66	+61	-5	+10
201-500	+54	+67	+61	+76	+73	-3	+19
More than 500	+53	+72	+77	+79	+70	-9	+17

INFLATION

Concerns about the impact of inflation have increased. Seventy percent at least somewhat agree that they are extremely concerned about the impact of inflation, resulting in a Net Rating of +55. The Net Rating increased 21 points from last quarter and is close to what it was last year at this time, likely due to the huge increase in the cost of oil being impacted by the conflict in the Middle East.

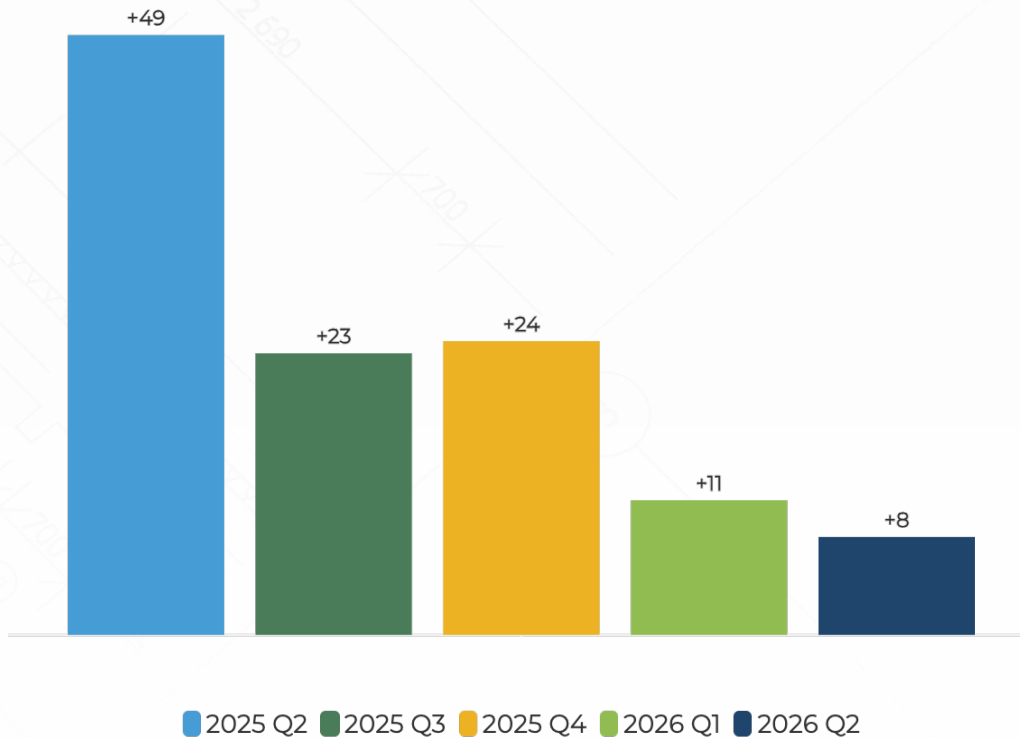
FIGURE 16: INFLATION CONCERNS VS. PREVIOUS QUARTERS



TARIFFS

Concerns over the impact of tariffs have lessened but remain present. Forty percent of respondents at least somewhat agree that they are extremely concerned about the impact of tariffs on their firm in the coming year, yielding a Net Rating of +9, down sharply from its first reading of +49 in Q2 2025.

FIGURE 17: TARIFF CONCERNS VS. PREVIOUS QUARTERS



LIKELIHOOD OF RECESSION IN NEXT SIX MONTHS

Executives placed recession probability at 46 percent over the next six months, up eight points from last quarter but down eight points year-over-year.

FIGURE 18: LIKELIHOOD OF RECESSION IN NEXT SIX MONTHS VS. PREVIOUS QUARTER

Likelihood of Recession	2025 Q2 (n=517)	2025 Q3 (n=739)	2025 Q4 (n=612)	2026 Q1 (n=540)	2026 Q2 (n=528)	Change vs. Previous Quarter	Change vs. Previous Year
TOTAL	54%	41%	45%	38%	46%	+8	-8
REGION							
Northeast	52%	39%	45%	36%	42%	+6	-10
South	55%	40%	43%	36%	44%	+8	-11
Midwest	54%	42%	45%	39%	46%	+7	-8
West	54%	43%	46%	41%	49%	+8	-5
FIRM SIZE							
1-25	55%	45%	49%	40%	47%	+7	-8
26-50	56%	42%	49%	42%	48%	+6	-8
51-200	53%	40%	42%	35%	45%	+10	-8
201-500	51%	39%	42%	34%	43%	+9	-8
More than 500	54%	39%	43%	39%	45%	+6	-9

HOT TOPICS

Firms are navigating a more balanced yet still cost- and labor-sensitive operating environment, with easing labor pressures offset by rising health insurance expenses.

Key shifts this quarter:

Fewer firms are turning down work due to staffing shortages.

Recruitment challenges have eased slightly, though skilled talent remains scarce.

Healthcare costs pressures are significant.

Firms are becoming more selective in the work they pursue.

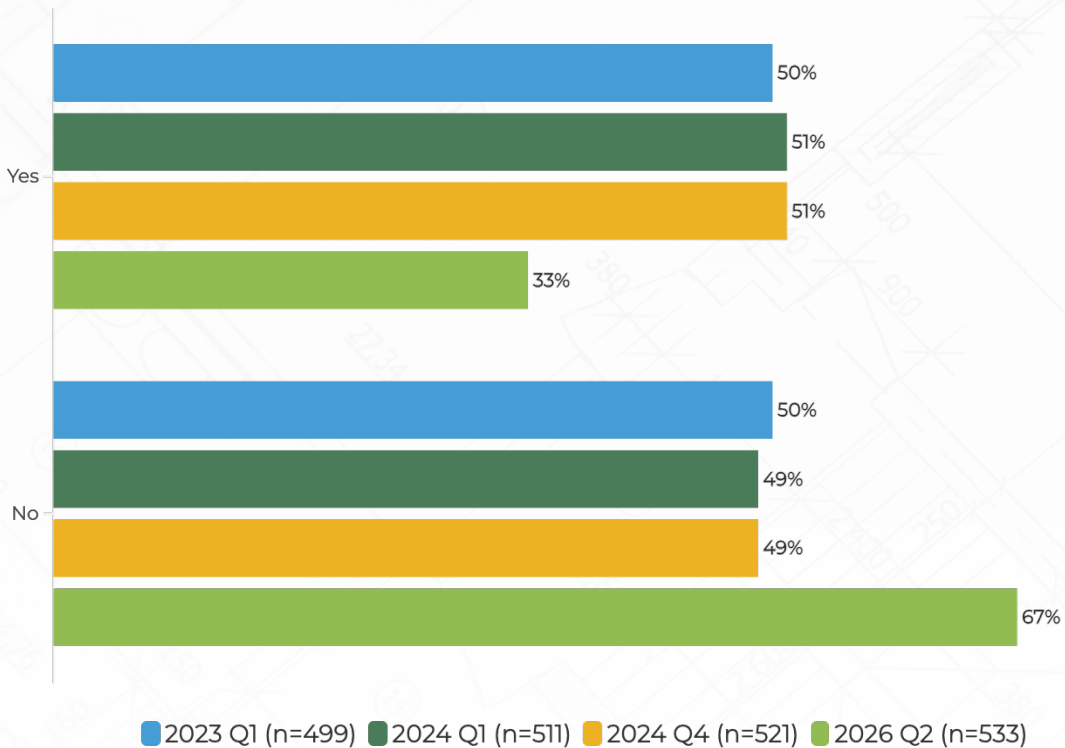
Operationally, firms are balancing improved workforce availability with increasing healthcare expenses. Most have not yet adjusted hiring plans, but cost pressures are becoming more central to decision-making.

Bottom line: Firms are adapting through greater selectivity and tighter operational discipline.

TURNED DOWN WORK DUE TO WORKFORCE SHORTAGE

Fewer firms are turning down work due to a workforce shortage. Only 33 percent turned down work during the prior six months, compared to 51 percent when this question was last asked in 2024 Q4.

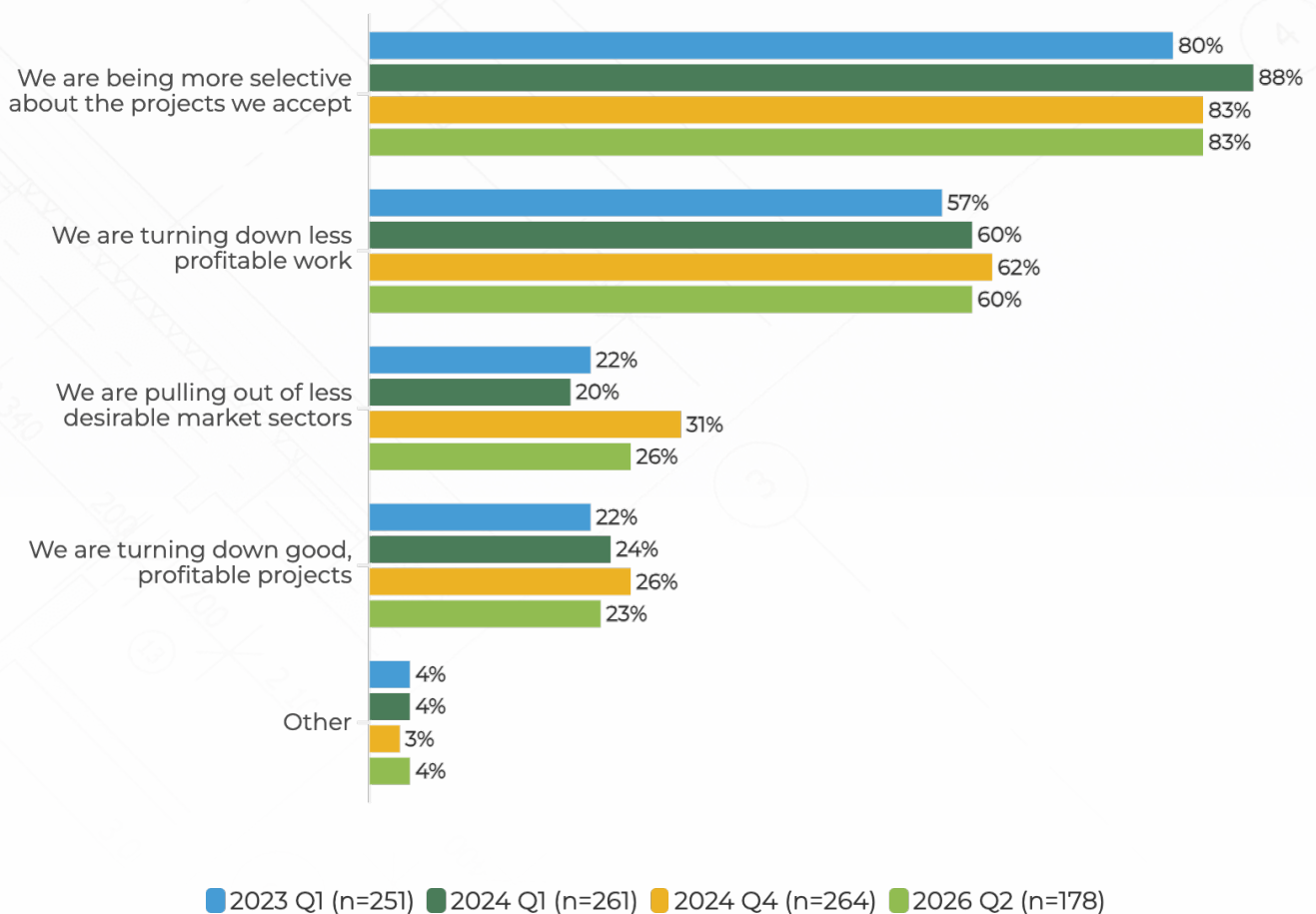
FIGURE 19: TURNED DOWN WORK DUE TO WORKFORCE SHORTAGE



TYPES OF WORK TURNED DOWN

Among those who have turned down work due to a workforce shortage, 83 percent are more selective about the projects they accept, and 60 percent are turning down less profitable work. This is broadly consistent with the other times this question has been asked in recent years.

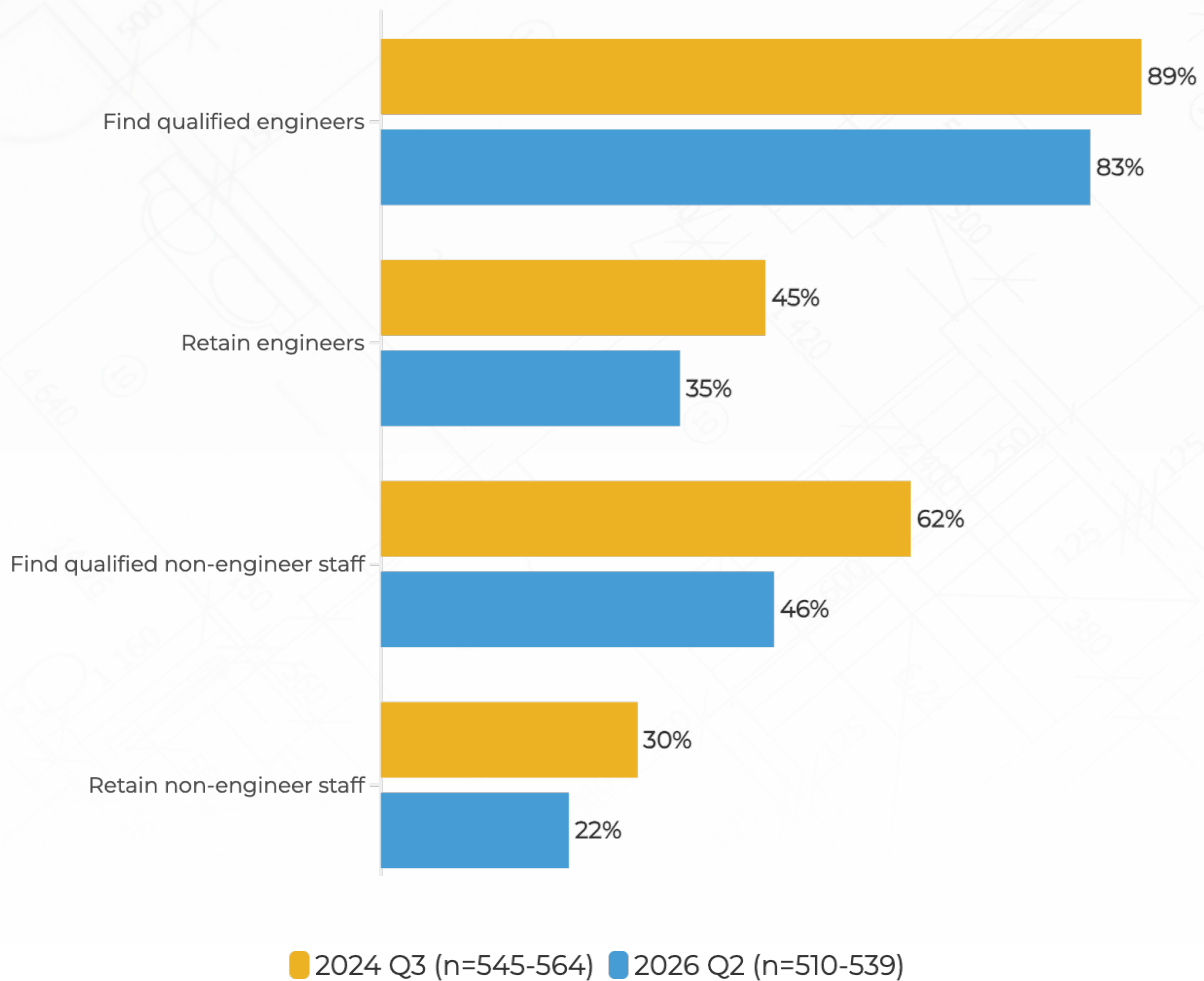
FIGURE 20: TYPES OF WORK TURNED DOWN



WORKFORCE RECRUITMENT

Across all metrics, firms are finding it a little less difficult to recruit employees than they were in 2024 Q3. Finding qualified engineers remains the greatest challenge (83%). The smaller the firm, the more likely it is to be extremely difficult to find qualified engineers. Somewhat counterintuitively, the larger the firm, the more difficult it is for them to retain engineers.

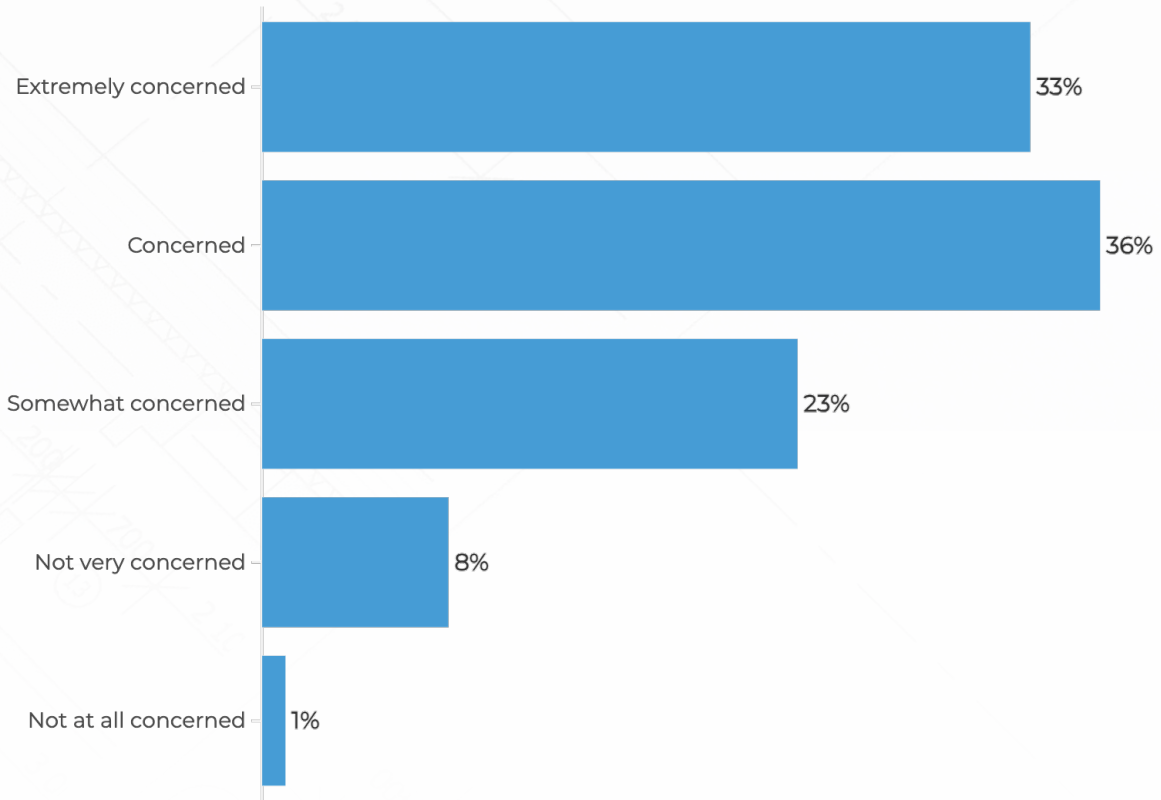
FIGURE 21: WORKFORCE RECRUITMENT (% CITING DIFFICULTY)



COST OF HEALTH INSURANCE PREMIUMS

Sixty-seven percent of respondents are concerned/ extremely concerned about the cost of health insurance premiums and another 23 percent are somewhat concerned. Only nine percent of respondents are not concerned. Healthcare insurance premiums pose more of a concern to smaller firms than to larger firms.

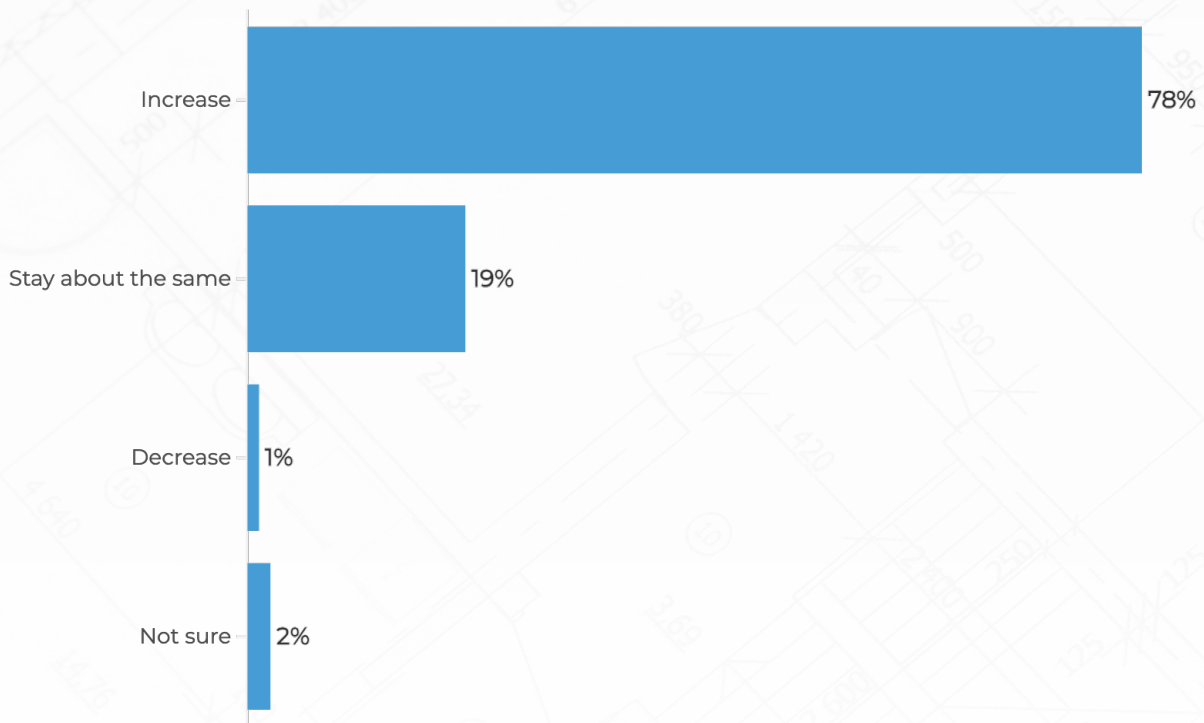
FIGURE 22: COST OF HEALTH INSURANCE PREMIUMS



CHANGE IN INSURANCE PREMIUM

Seventy-eight percent of firms saw an increase in healthcare insurance premiums during their most recent renewal period.

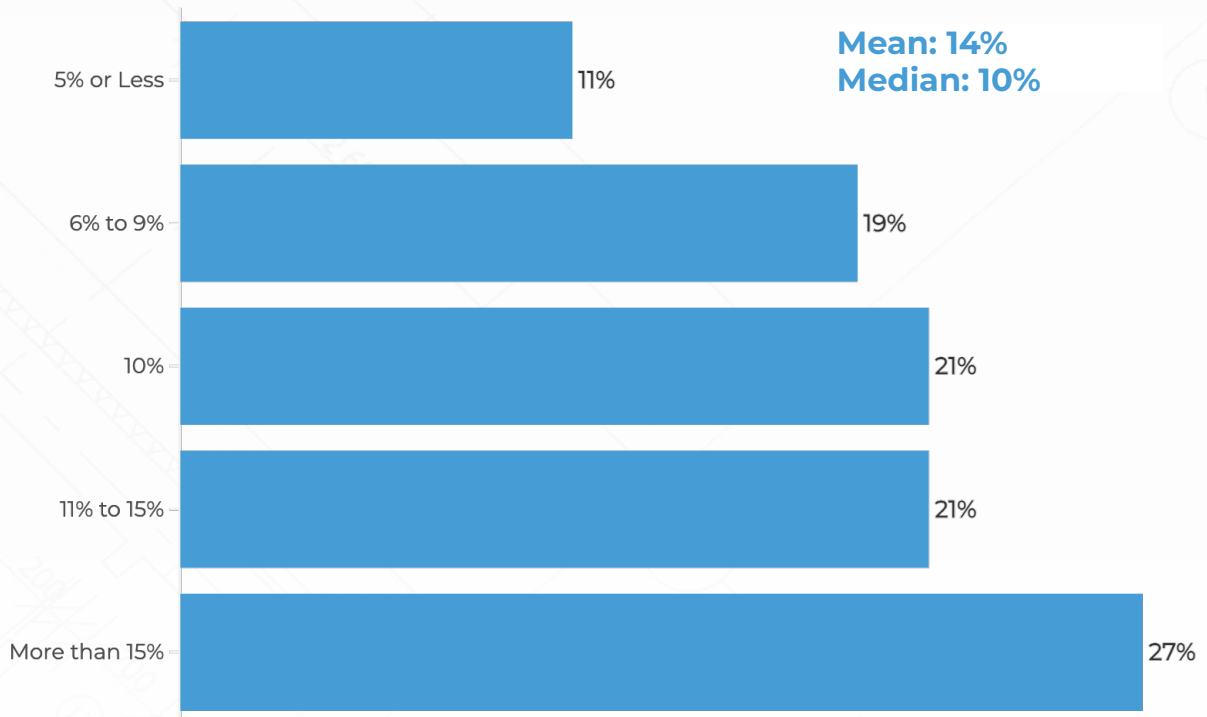
FIGURE 23: CHANGE IN INSURANCE PREMIUMS



PERCENTAGE INCREASE IN INSURANCE PREMIUMS

Forty-eight percent say that their insurance premiums increased more than 10 percent. The average increase was 14 percent.

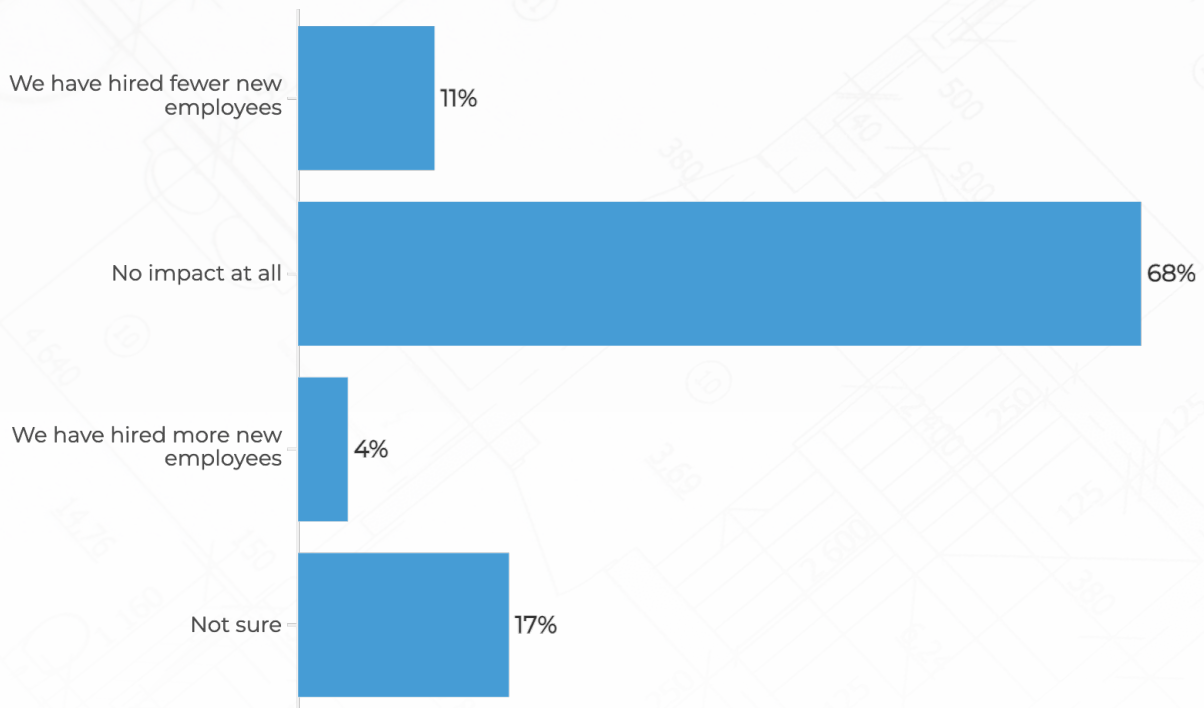
**FIGURE 24: PERCENTAGE INCREASE IN INSURANCE PREMIUMS
(AMONG THOSE CITING AN INCREASE)**



IMPACT OF INSURANCE PREMIUMS ON HIRING

Despite, in many cases, the rising cost of insurance premiums, 68% of firms say this has had no effect on hiring practices. Fifteen percent of the smallest firms (1 to 25 FTEs) said they would hire fewer new employees as a result of increased insurance premiums; only three percent of the largest firms (More than 500 FTEs) said they would hire fewer employees as a result.

FIGURE 25: IMPACT OF INSURANCE PREMIUMS ON HIRING



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 April 7 and April 20, 2026.

A total of 9,655 invitations were emailed, although 2,930 bounced and 40 opted out, resulting in 6,685 potential respondents. Individuals who did not respond to the first email were sent up to three follow-up reminders. Altogether, 583 individuals completed the survey for an overall response rate of nine percent.

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

In addition, “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

THANK YOU TO OUR CONTRIBUTORS

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.

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