



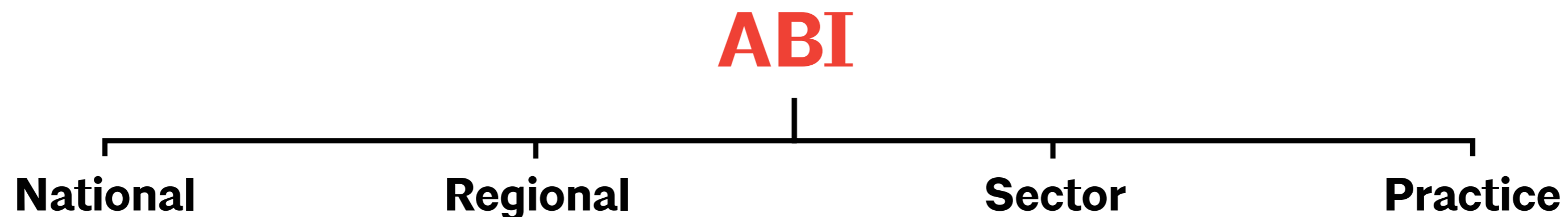
Deltek®

AIA/Deltek Architecture Billings Index (ABI)

November 2025

The AIA/Deltek Architecture Billings Index (ABI) is a diffusion index derived from the monthly Work-on-the-Boards survey, conducted by the AIA Economics & Market Research Group. The ABI serves as a leading economic indicator that leads nonresidential construction activity by approximately 9-12 months. The survey panel asks participants whether their billings increased, decreased, or stayed the same in the month that just ended. According to the proportion of respondents choosing each option, a score is generated, which represents an index value for each month. An index score of 50 represents no change in firm billings from the previous month, a score above 50 indicates an increase in firm billings from the previous month, and a score below 50 indicates a decline in firm billings from the previous month.

*All graphs represent data from November 2024–November 2025.



National

Architecture firm billings remain stagnant.

Graphs represent data from November 2024–November 2025.

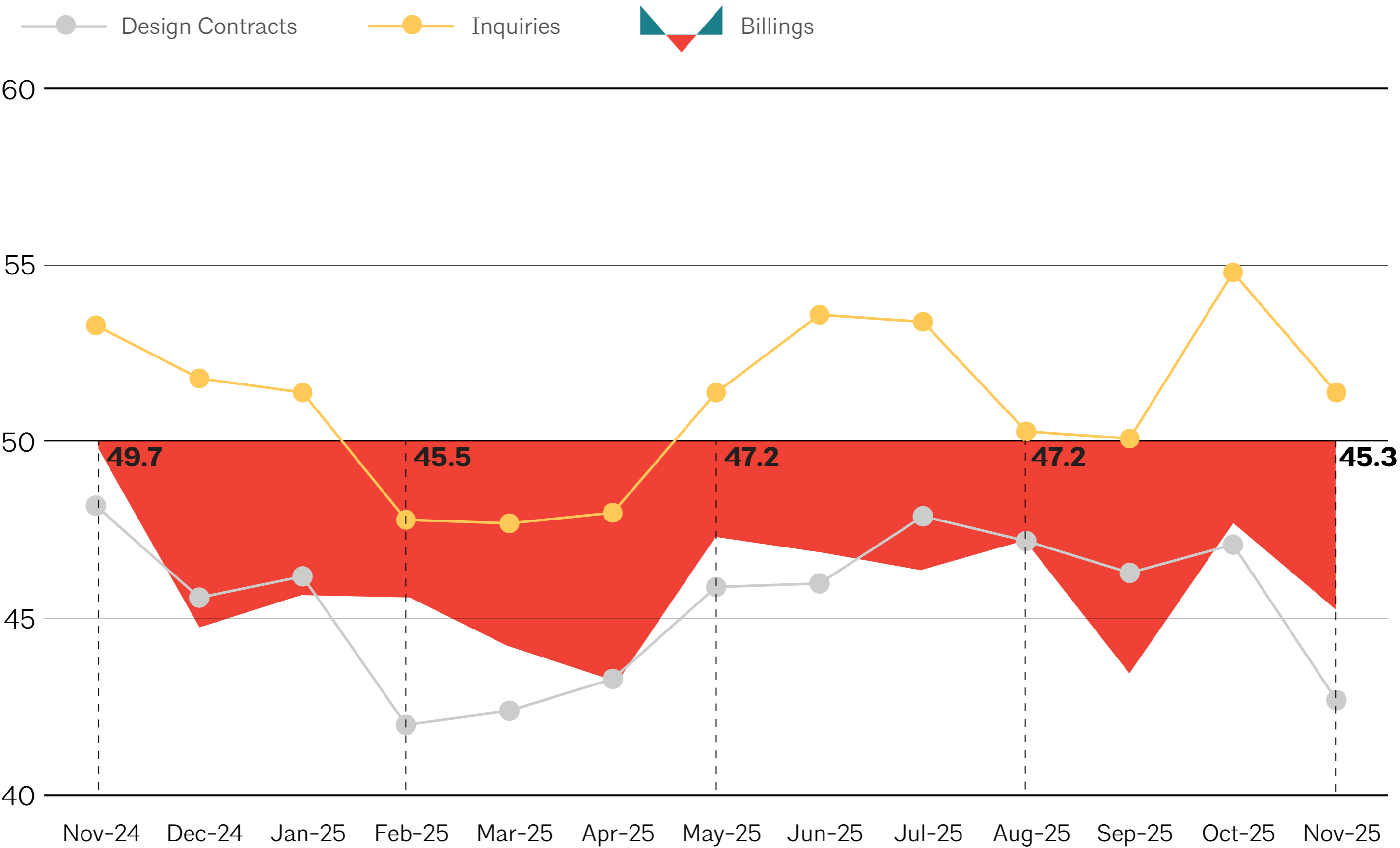


Above 50



Below 50

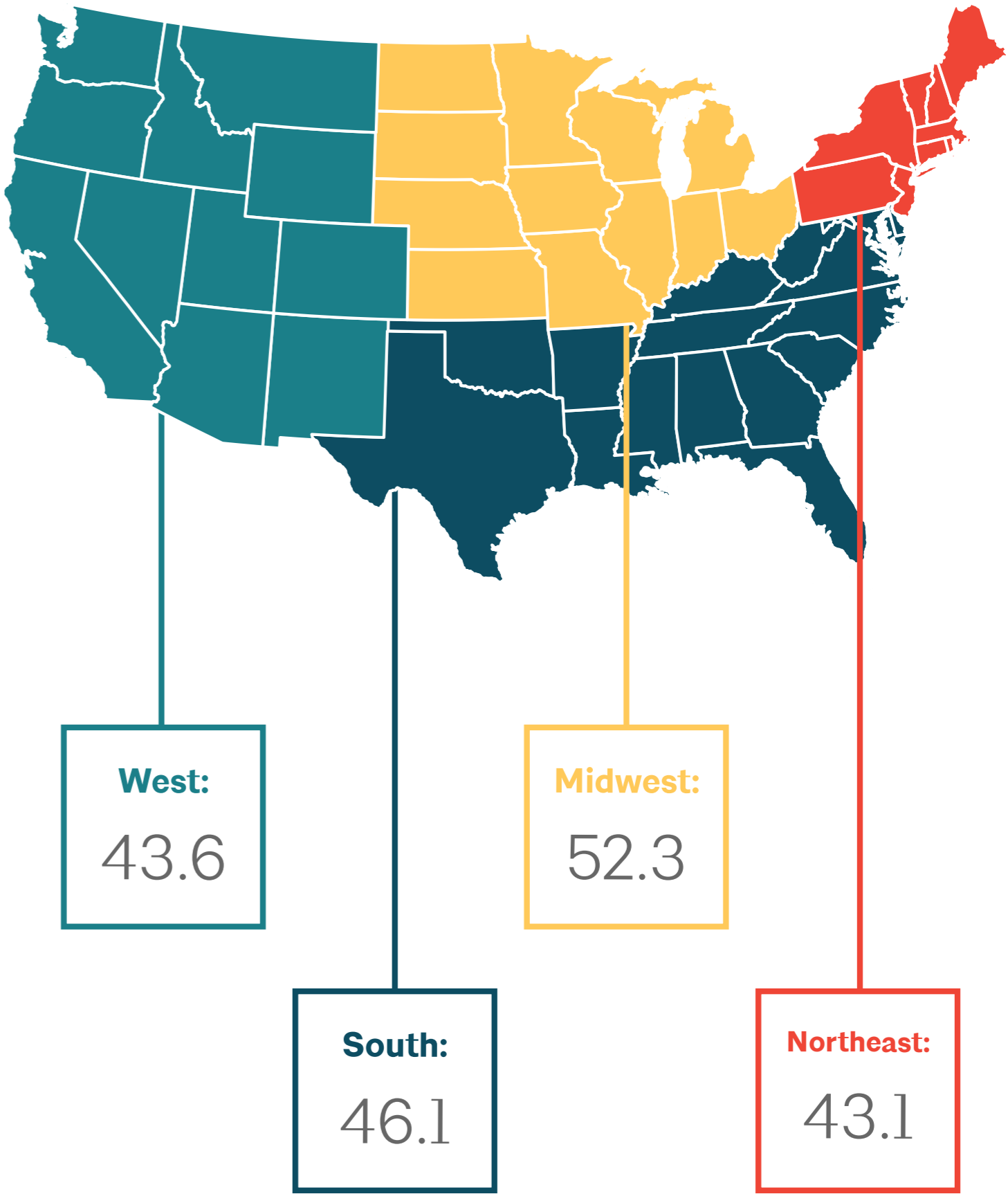
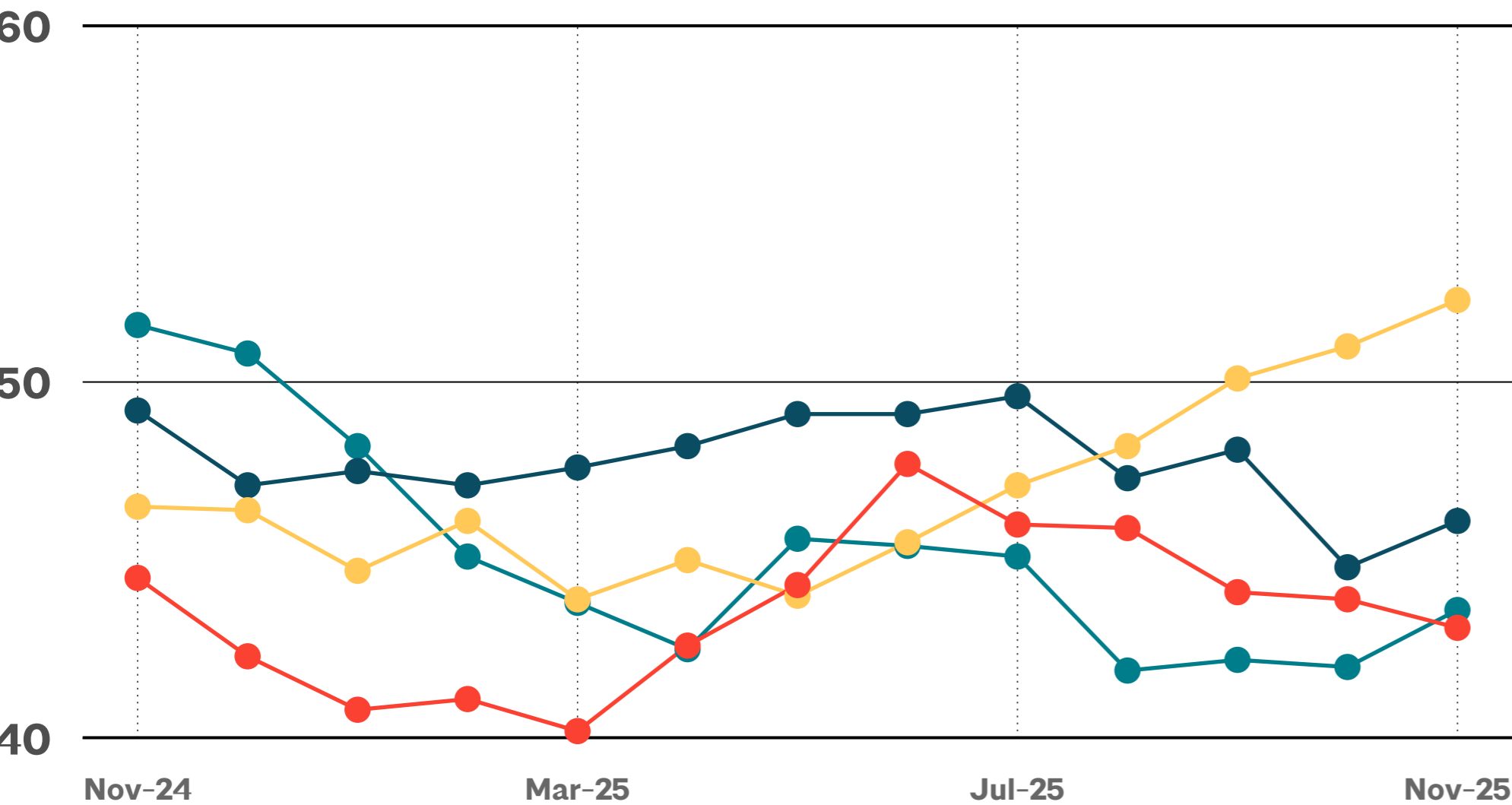
No change from previous period



Regional

Firms located in the Midwest continue to report improving business conditions.

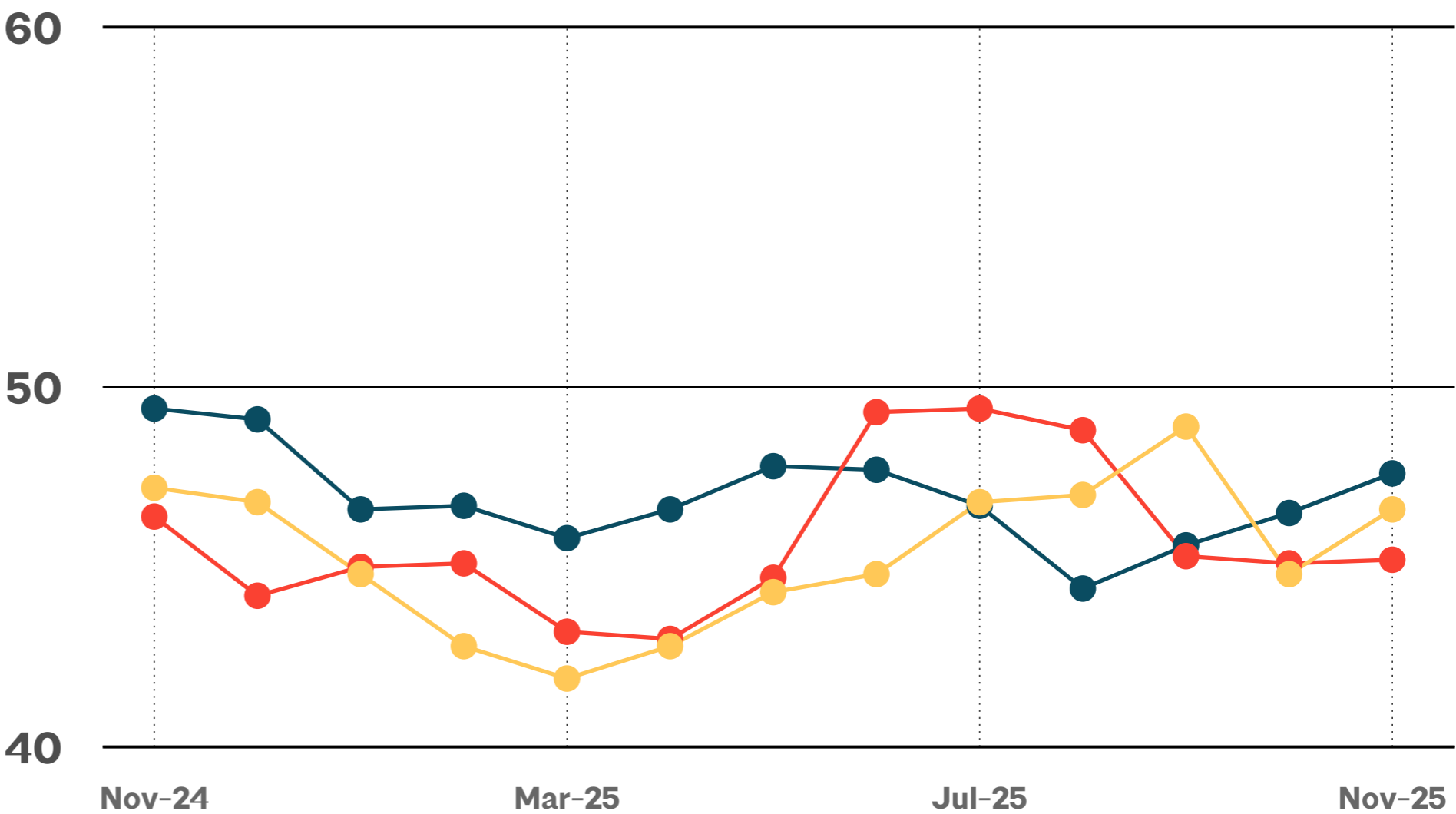
Graphs represent data from November 2024–November 2025 across the four regions. 50 represents the diffusion center. A score of 50 equals no change from the previous month. Above 50 shows increase; Below 50 shows decrease. 3-month moving average.



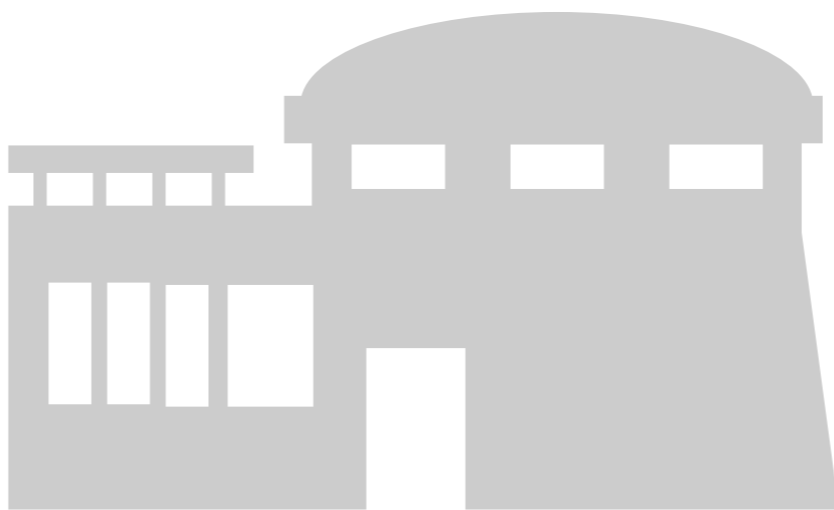
Sector

Billings remain soft at firms of all specializations.

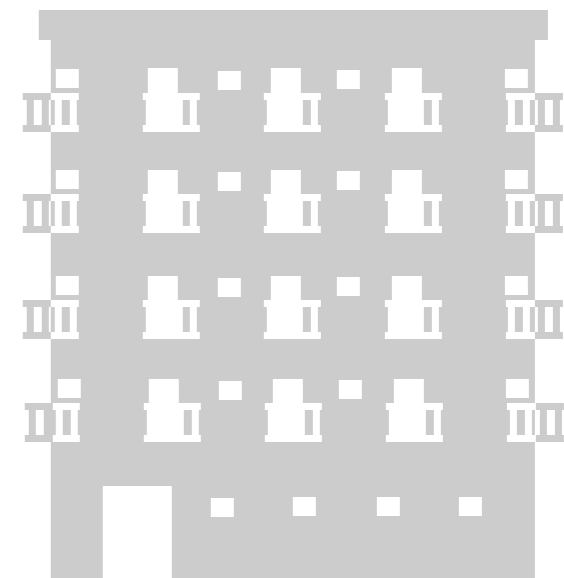
Graphs represent data from November 2024–November 2025 across the three sectors. 50 represents the diffusion center. A score of 50 equals no change from the previous month. Above 50 shows increase; Below 50 shows decrease. 3-month moving average.



Commercial/Industrial: 45.2



Institutional: 47.6



Residential: 46.6

Practice

Profitability remains one of the biggest concerns for 2026 at architecture firms

% of firms selecting issue as one of their top three business-related concerns for 2026, of firms that rated issue as a major concern for the coming year

- Firm management and strategy concerns
- Project management, marketing, development concerns
- Staffing and professional development concerns

