State of Design & Make

Engineering service providers

INSIGHT 1 Digital transformation efforts have an overwhelmingly positive impact

digital transformation 1. **Improved** productivity 33% 2. 36% **Reduced cost** 26% 3. 34% **Improved** collaboration 30%

10%

Digital transformation benefits the entire organization Digitally mature companies are

more likely than their peers to...

+26%

have experienced "above

average" or "exceptional" performance +30%

have "increased" or "strongly increased"

investment in the past 3 years

"agree" they are prepared for the future

+39%

+30% have kept up

"very well" with change in the industry

INSIGHT 2 Sustainability transitions from pressure to profitability Stakeholder influence is in decline

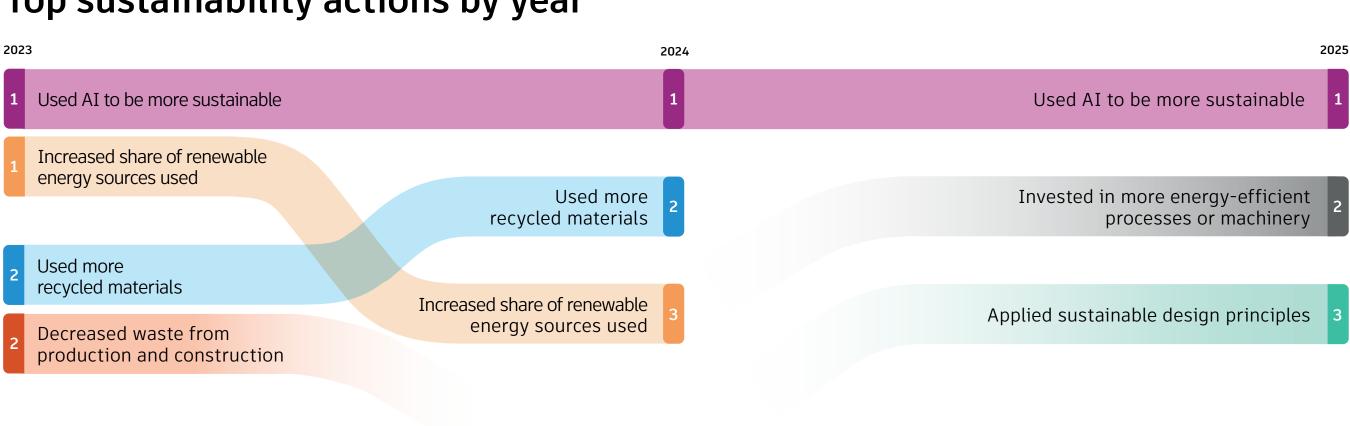
20%



Top 3 benefits of

2024 80% 2025 70% 60% 50% 40% Customers **Employees** Investors **Policymakers INSIGHT 3** AI solidifies its place as the top sustainability enabler

Top sustainability actions by year



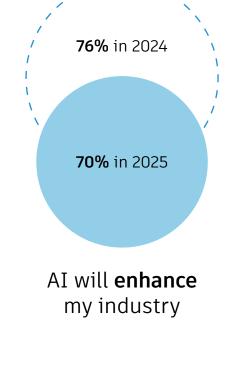
Digitally mature companies report using AI technology for

sustainability more than less digitally mature organizations

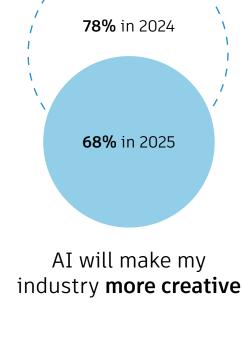
40% vs. 36%

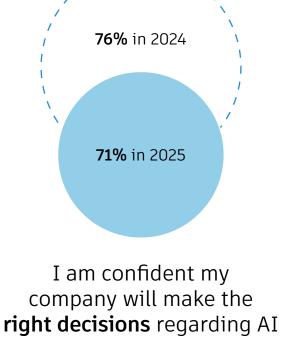
AI sentiment is down across engineering service providers

INSIGHT 4 The AI hype cycle meets reality

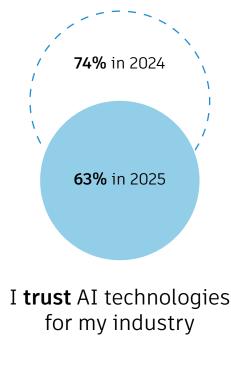


75%





of leaders at digitally mature organizations say they will increase investment in AI, compared to 65% at less digitally mature companies



INSIGHT 5 Tech, cost and talent are top concerns

challenges for engineering service providers

Top organizational

39% technological advancements including AI **31%** in AECO 31% globally Digitally mature organizations were

cost control and cost management **34%** in AECO 33% globally 2 more likely to diversify their supply chains—giving them a significant edge when it comes to resilience

The future global landscape feels

more uncertain now than 3 years ago

34%

attracting, training, and retaining talent 27% in AECO 26% globally 3

31%

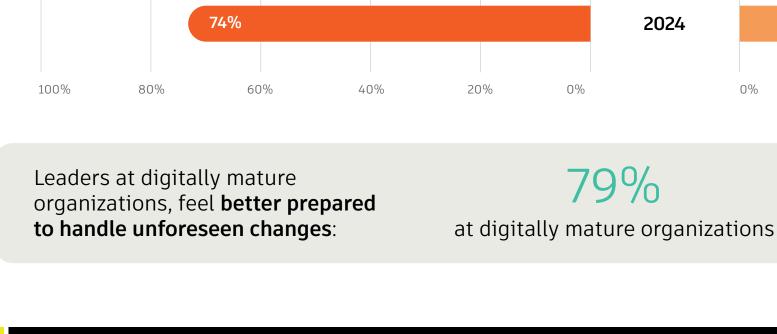
Leaders are more optimistic about the future, but feel less prepared My company is well prepared to handle unforeseen

INSIGHT 6 Leaders are cautious in the near term

future macroeconomic and geopolitical changes

60% 63% 2025

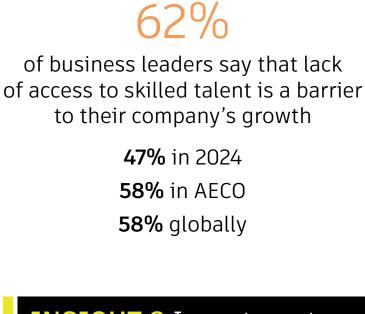
2024



INSIGHT 7 The search for talent intensifies, with a focus on AI skills Lack of skilled talent is hindering growth

40% 20% 60% 80% 100% 40% at **less** digitally mature organizations

64%



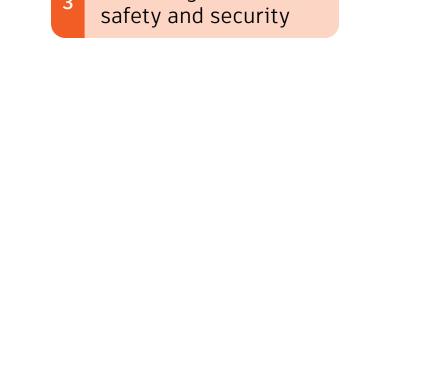
26% of digitally mature companies report improved talent acquisition and retention as a benefit of digital transformation 19% of less digitally mature companies **INSIGHT 8** Investments remain strong but reflect uncertainty

Software development/ programming Knowledge of data

Ability to implement/

work with AI

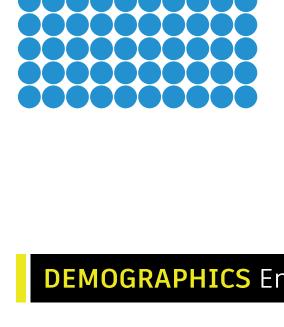
Future hiring priorities



digitally

mature

of business leaders say their organizations will increase or strongly increase their investments over the next three years



373

67% globally

81% in 2024

64% in AECO

66%

DEMOGRAPHICS Engineering service providers

informed, strategic decisions about how to prioritize and invest for the future. This is the third longitudinal year of

Considering entering new markets 72% vs. 50% less digitally digitally mature mature

Planning to increase future investments

79% vs. 53%

less digitally

mature

The State of Design & Make report is a global, annual, longitudinal study for leaders who design and make places objects, and experiences. It identifies the most pressing issues shaping today's businesses and helps leaders make

this report series with data comparisons from the previous two reports. 12% **AMER** survey respondents in 2025

49%

APAC

288 survey respondents in 2024 **279** survey respondents in 2023

191 number of respondents classified as digitally mature in 2025

39% **EMEA** Composition of the engineering service providers subset

Access the full **2025 State of Design & Make** report including all glossary terms and research insights

Source: Autodesk, 2025 State of Design & Make report and study data