State of
Design & Make

AUTODESK

AMER REGION REPORT
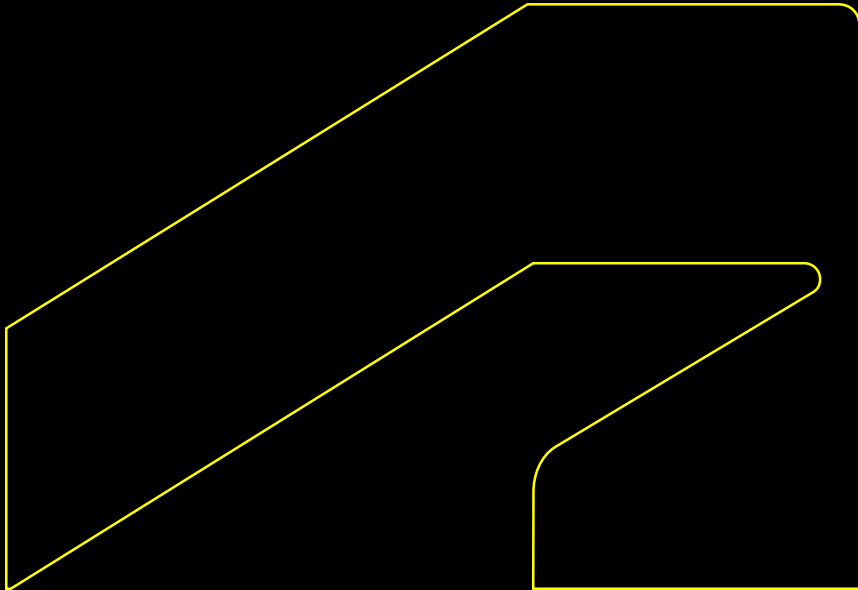
2024
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About the
AMER report

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 informed, strategic decisions about how to prioritize and invest for the future.

For the *2025 State of Design & Make AMER region* report, Autodesk surveyed and interviewed 937 industry leaders, futurists, and experts across Design and Make industries: architecture, engineering, construction, and operations (AECO); design and manufacturing (D&M); and media and entertainment (M&E) located in the Americas region (AMER) including Brazil, Canada, Mexico, and the United States. This is the third longitudinal year of this report series with data comparisons from the previous two reports.

What is Design and Make?

A convergence of technologies and methodologies in industries that produce digital and built assets over the past 40-plus years has resulted in a distinct category of work: Design and Make. Design and Make shapes the surrounding world, translating complex ideas into powerful experiences, whether it's transforming a sketch into a school, turning a concept into a car, or making a myth into a movie.

Globally, Design and Make employs, conservatively, 295.7 million people.[1]

Before digitalization, much of this work took place in discrete, siloed phases, handed off from specialist to specialist. With the advent of digital workspaces and modeling tools, these phases have converged into a centralized way of working informed by data-driven insights. Today, teams collaborating on Design and Make projects see their work as part of a larger, interconnected process. Digital tools and standards make it easier to map interdependencies, refine processes, and democratize solutions.

For the professionals immersed in it every day, Design and Make is more than a way of working—it's a philosophy and a mindset. It represents a deep belief that every challenge and complexity can be overcome with the right tools and the right skill set. Designers and makers are optimists united by a shared drive to make a better world for all.

[1] World Economic Forum, 2023

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Introduction

Leaders in the AMER region report that they are confronting daunting headwinds, from increased geopolitical uncertainty and inflation to talent gaps and challenges implementing emerging technologies like artificial intelligence (AI). But for the third year, digital transformation has proven to help M&E organizations identify opportunity amid disruption, providing benefits nearly across the board.

2025 State of Design & Make key findings for AMER

Leaders were clear on the challenges they are facing.

Cost control and technological advancements are top of mind for Design and Make organizations amid continued inflation, increasing supply-chain fragility, and ongoing implementation challenges. Talent remains a perennial problem, with 28% of AMER organizations experiencing a skills gap and the majority saying lack of skilled talent is hindering growth.

Optimism about AI is down, and concern about its destabilizing effects is up among leaders in AMER as organizations struggle with finding practical use cases for the new technology. And, finally, global uncertainty is depleting organizational confidence and increasing feelings of unpreparedness.

Despite this uncertainty, business leaders in AMER are still feeling bullish in some areas as they identify opportunity amid disruption.

- Although overall investments are down year-over-year, 71% of leaders say they will increase overall future investments.
- Sustainability is experiencing a surge of optimism, with nearly all leaders saying their organizations are taking steps to be more sustainable. Sustainability also continues to be a key differentiator in talent acquisition.
- This year, AI solidified its place as the top sustainability enabler for Design and Make organizations in AMER, with applications from natural-disaster mitigation to project lifecycle management.

One standout finding this year is that most AMER leaders surveyed say digital transformation efforts led to improvements at their organizations. Digitally mature companies tend to invest more heavily in technology, and those investments are now paying outsize dividends during the current period of caution.

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The digital maturity difference

In this report, "digitally mature" companies are defined as those that are approaching or have achieved the goal of their digital transformation journey. "Less digitally mature" companies are defined as those that are in the early stages or right in the middle of their digital transformation journey.

- Digitally mature organizations in AMER are 23% more likely to diversify their supply chains, and leaders at these organizations feel more prepared to handle unforeseen changes compared to less digitally mature companies, giving them an advantage when it comes to resilience.

- These organizations are also more likely to leverage internal data to gain a competitive edge, more quickly develop products and services, and complete projects faster than other companies.

- Digital maturity eases talent concerns, with a 11-point improvement in talent acquisition and retention from their technological advancement over less digitally mature organizations.

- Organizations that are digitally mature are more likely to enter new markets and increase investments into acquisitions, allowing them to expand while others are contracting.

There's no question that leaders in AMER are confronting a challenging geopolitical and macroeconomic environment. But given the findings of the *2025 State of Design & Make* survey, a resilience agenda centered on digital transformation can provide strong protection against uncertainty.

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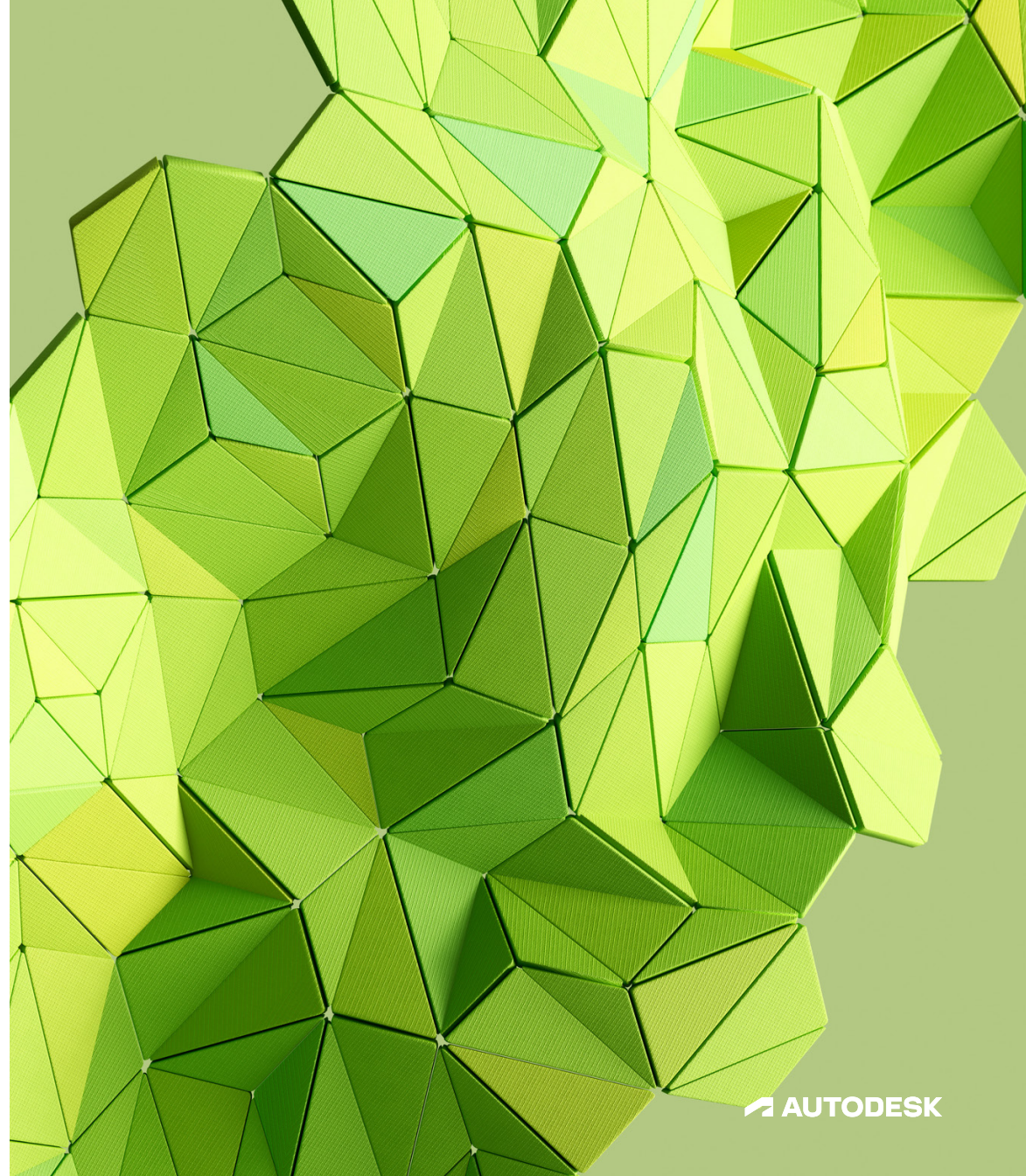
Digital transformation efforts have an overwhelmingly positive impact

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"I'm deeply engaged with Foth's digital delivery initiative. Early in my career, I witnessed the transition from 2D to 3D designs, and now we're seeing that again with 3D design to actual digital delivery of BIM and the removal of traditional plans. I think we're in the midst of the most substantial technological change of my career. While there is still considerable work ahead, we are making significant progress."

BLAINE BUENGER
Technology Director, Infrastructure Solutions, Foth, a science, engineering, and technology company headquartered in the United States

Digital maturity benefits the entire organization

In this report, "digitally mature" companies are defined as those that are approaching the goal or have achieved the goal of their digital transformation journey. "Less digitally mature" companies are defined as those that are in the early stages or right in the middle of their digital transformation journey.

In AMER, respondents from digitally mature companies report they are …

+24%
… more likely to have experienced "above average" or "exceptional" **performance**

+21%
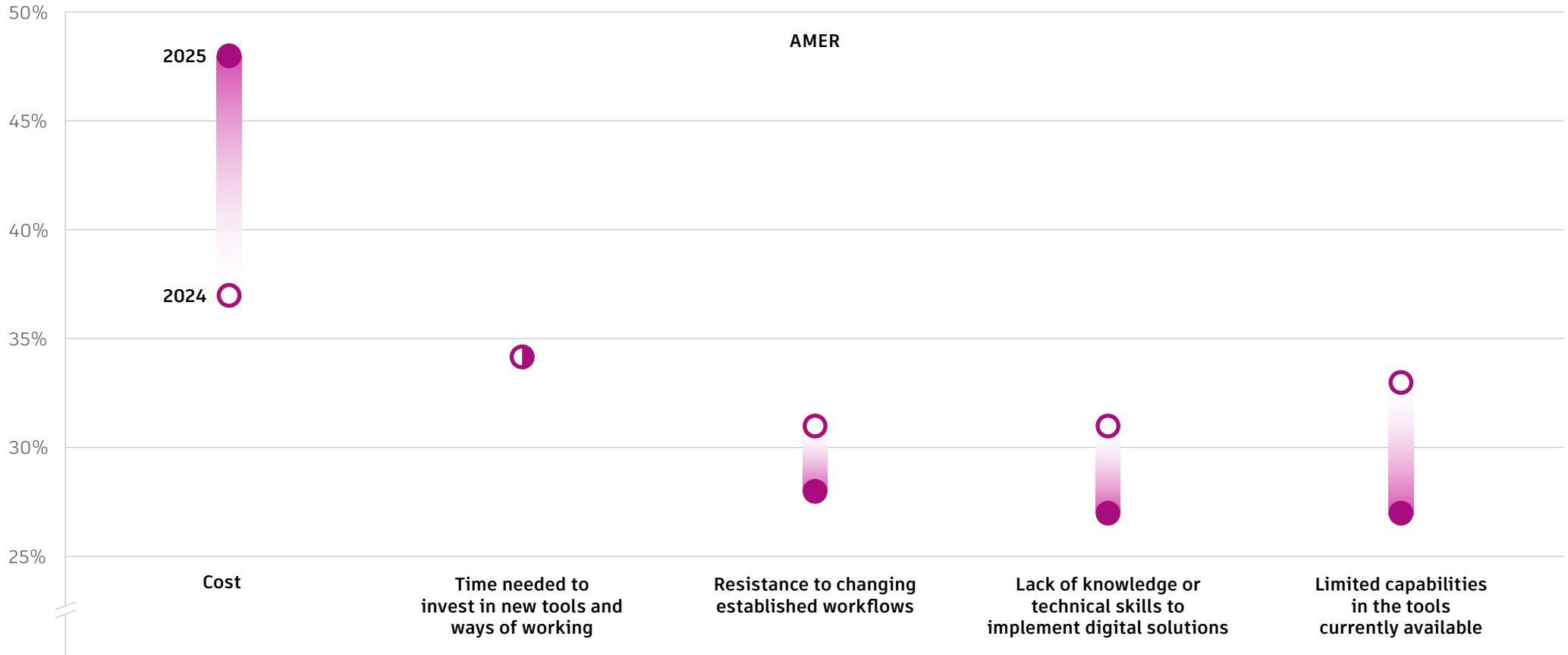… more likely to "agree" they **are prepared** for the future

+34%
… more likely to have "increased" or "strongly increased" **investment** in the past 3 years

+25%
… more likely to have kept up "very well" with **change in the industry**

With results like these, less digitally mature organizations thinking about reducing their digital transformation investments in the next few years should reconsider. The benefits of digitalization are clear, and the longer organizations take to get up to speed, the greater the drag on their performance will be. While sometimes challenging, the long-term benefits of digital transformation far outweigh short-term struggles.

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Cost, time, and talent are the biggest barriers to digital transformation

AMER

2025

2024

50%

45%

40%

35%

30%

25%

Cost

Time needed to
invest in new tools and
ways of working

Resistance to changing
established workflows

Lack of knowledge or
technical skills to
implement digital solutions

Limited capabilities
in the tools
currently available

Survey question: What are the barriers to digital transformation in your company or organization?
Select all that apply.

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"I think our biggest issues now are cost and also the new processes that we are trying to implement at the company. So that's the biggest challenge for the next five years is transitioning completely to digital. For example, we still have power plants on paper and we must bring them to a 3D model."

VINICIUS PRATA
Leader of the Power Generation BIM Committee, Eletrobras,
an electric power generation and transmission company headquartered in Brazil

The cost of digital transformation is a growing challenge for many organizations in AMER, with 48% of leaders saying it's their main barrier, up from 37% last year and reflecting a global increase in concern about cost control. But given the outsize returns organizations are seeing from their digital transformation investments, cost-cutting measures could have equally outsize negative effects if they impact technology initiatives. Talent and time follow as most-cited obstacles as organizations struggle to meet implementation goals while also trying to do more with fewer resources.

The more digitally mature an organization, the less concerned they are with cost and talent and the more concerned they are with the actual technology. Digitally mature companies in AMER less often cite cost (46% compared to 49%) as a barrier. These organizations also have an advantage when it comes to talent, with 78% of leaders saying digital transformation has improved talent acquisition and retention compared to 60% at less digitally mature companies.

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Sustainability transitions from pressure to profitability

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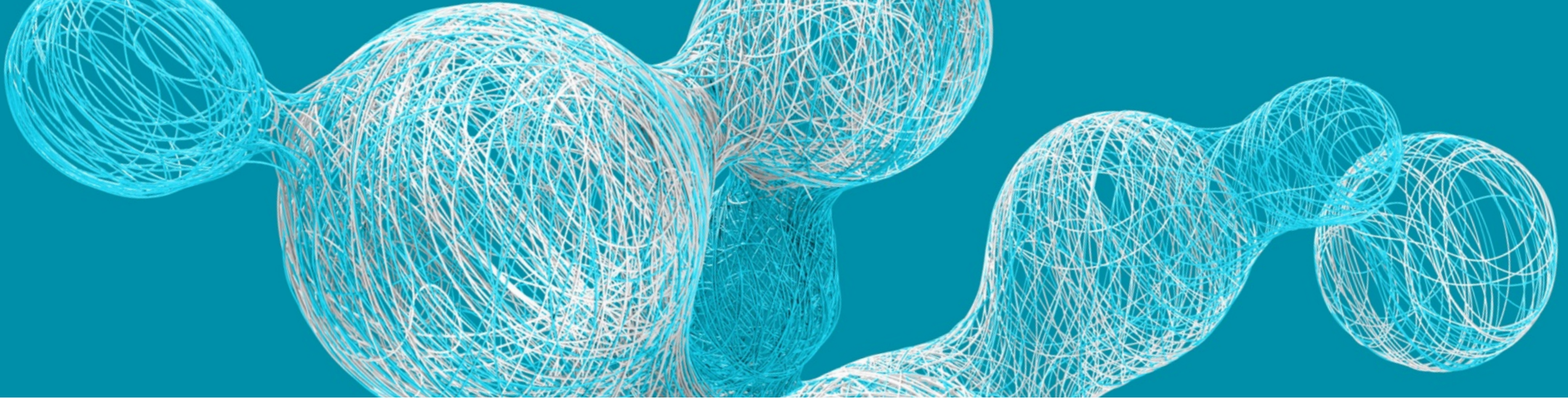
INSIGHT 2: AMER

Increasing awareness of the business value of sustainability has many leaders changing their perspective, seeing sustainability initiatives less as an obligation and more as an opportunity for greater performance. The number of executives globally who understand the business case for sustainability tripled between 2022 and 2023,[2] and the majority of *2025 State of Design & Make* survey respondents say that sustainability is crucial for future business growth in the next three years.

This signals a shift in sentiment and priorities, driven by both the short- and long-term opportunities that sustainability can provide. In AMER, 72% of business leaders believe that sustainability measures can generate in excess of 5% of their annual revenue.

While organizations across Design and Make industries are still influenced by stakeholders to become more sustainable, that influence appears to be waning. For instance, this year 75% of leaders in AMER say their sustainability initiatives were influenced by customers, compared to 87% in 2024.

> *"I am optimistic about the future. We have technology that will help us build new infrastructure, consuming less resources. We're becoming better and are investing in better, and greener, solutions."*
>
> **MARCELO PILLER**
> Director of Engineering and Innovation, OEC Engenharia, an engineering and construction firm headquartered in Brazil

[2] World Economic Forum, 2023

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At the heart of this perspective shift is the growing understanding that, while historically seen as a long-term revenue play, improving sustainability is also a good near-term strategy. This year in AMER, the gap between leaders who see sustainability as a short-term versus long-term strategy has narrowed to just 11%, signaling that sustainability is seen as good for business overall.

Digitally mature companies appear to be at an advantage when it comes to reaping sustainability benefits. Eighty-seven percent of digitally mature organizations in AMER see long-term benefits from sustainability and 76% see short-term benefits, compared to just 75% and 63% respectively at less digitally mature organizations.

Sustainability efforts are also easing talent struggles at digitally mature companies, with 75% of leaders reporting their sustainability efforts help attract and retain talent, compared to 61% at less digitally mature companies. Industry interviews reinforce these findings, with leaders saying younger skilled workers want to join organizations that are both technologically advanced and committed to building a better future.

Leaders at digitally mature companies appear to be seeing the transformational potential of sustainability across their organizations—and are likely increasing their budgets to match. In AMER, 75% of leaders say they will increase their investments in environmental sustainability, compared to just 52% at less digitally mature companies.

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Brazil and the United States are most influenced by customers
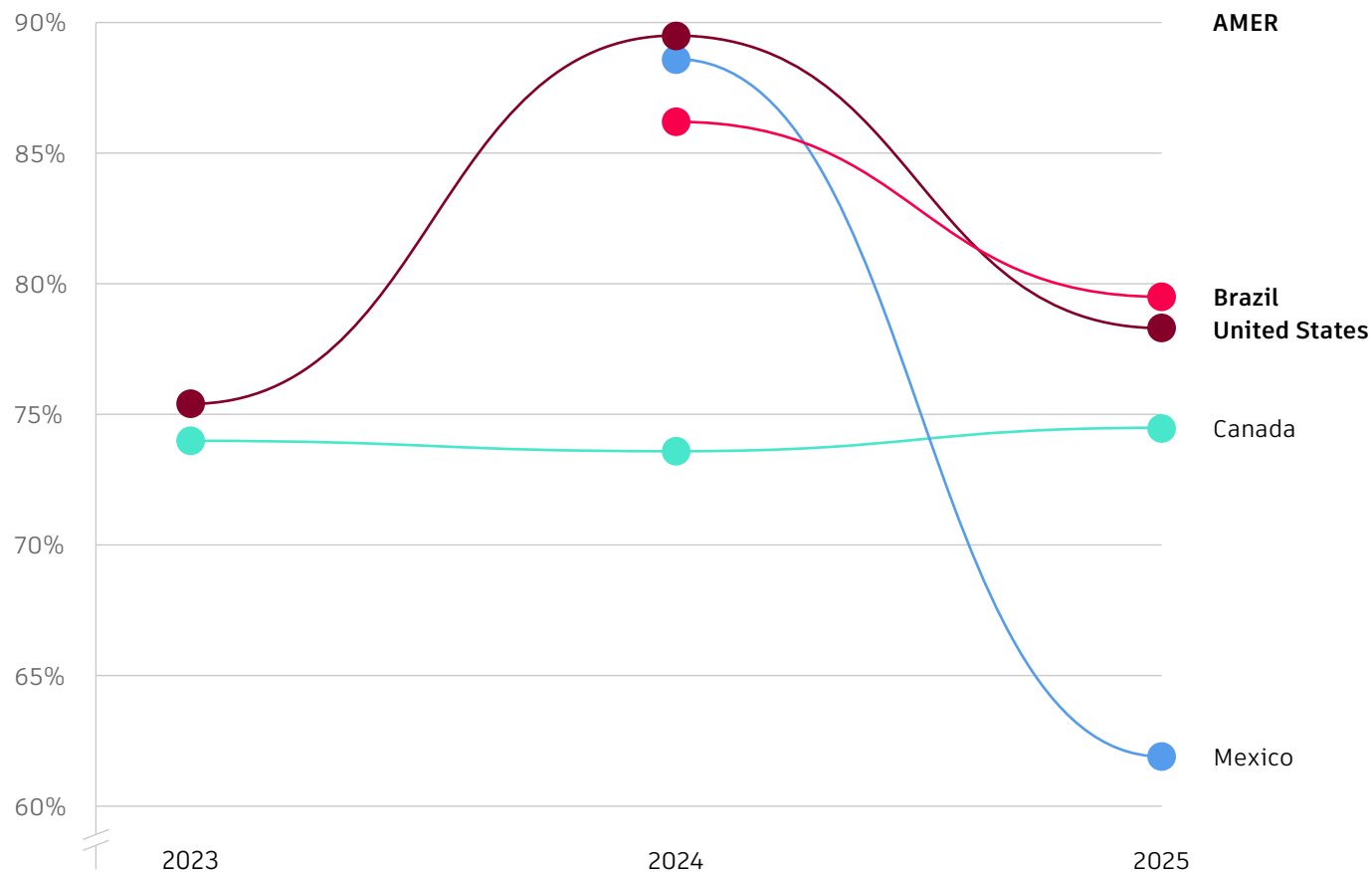
Percentage of respondents who agree that customers are influential when it comes to their sustainability goals. Survey question: How influential are the following groups in motivating your company or organization to create and meet sustainability goals? 5-point scale. Top two = influential.

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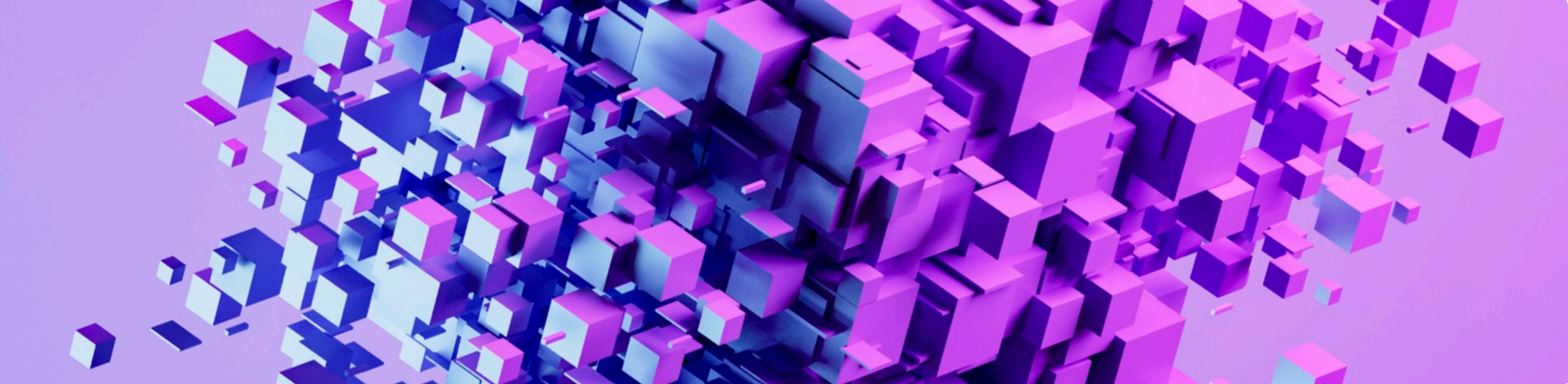
In the Americas, Brazil is where the largest percentage of business leaders surveyed (80%) say customers are influential in motivating companies to be more sustainable. The United States is close behind, with 78% of respondents citing customers as influential. However, both countries show declines compared to the previous survey. In 2024, 86% of respondents in Brazil and 90% of US respondents considered customers to be influential in motivating companies to create and meet sustainability goals.

The influence of customers dropped most significantly in Mexico, with a year-over-year decrease from 89% to 62%, making Mexico the Americas country where the lowest percentage of business leaders consider customers to be influential in motivating sustainability efforts.

"I think about 95% of our matrix are clean energy. So it's hydropower power plants; it's solar grids and all those technologies. I'm very proud to say, yes, we are very, very, very busy on the work and sustainability point."

VINICIUS PRATA
Leader of the Power Generation BIM Committee, Eletrobras, an electric power generation and transmission company headquartered in Brazil

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AI solidifies its place as the top sustainability enabler

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For the second year running, AI is the top sustainability enabler for Design and Make industries in AMER, with 42% of leaders saying they use AI to be more sustainable, up from 35% last year and 20% in 2023.

With nearly all organizations taking steps to be more sustainable, many are turning to AI technology to help enable sustainable outcomes. For instance, in the design and manufacturing industries, where 80% of a product's environmental impact is influenced by decisions made at the design stage,[3] AI is helping leaders think about sustainability from conception through production.

42%
of businesses in AMER have used AI to be more sustainable

[3] Ellen MacArthur Foundation

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The integration of AI into sustainability efforts is having an impact across Design and Make industries in AMER. Among other things, AI helps to mitigate the impact of natural disasters by visualizing flood impacts; reduce carbon footprint by optimizing building energy use and preventing material waste; and assess product lifecycles, providing a detailed view of environmental impact from materials sourcing through disposal.

Not surprisingly, digitally mature companies in AMER report using the technology for sustainability more than less digitally mature organizations (47% and 37%, respectively). At data-effective organizations—organizations at which leaders said they are "very effective" at leveraging data—the divide is more pronounced, with 50% of leaders using AI to enable sustainability compared to 40% of other organizations. These numbers highlight an AI implementation gap—one that may widen as technology advances,

providing a competitive advantage for digitally mature organizations.

Ironically, the AI technology enabling more sustainable outcomes is also increasingly taxing on the environment. Data centers require a large amount of water and energy to run and cool and produce electronic waste that is difficult to dispose of. Design and Make organizations are exploring solutions to this problem to offset the impact of data centers, including carbon removal technology or carbon offset programs.

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AMER sees the largest increase in AI adoption for sustainability

AMER

United States
Brazil
Canada

45%
40%
35%
30%
25%
20%
15%

2023 2024 2025
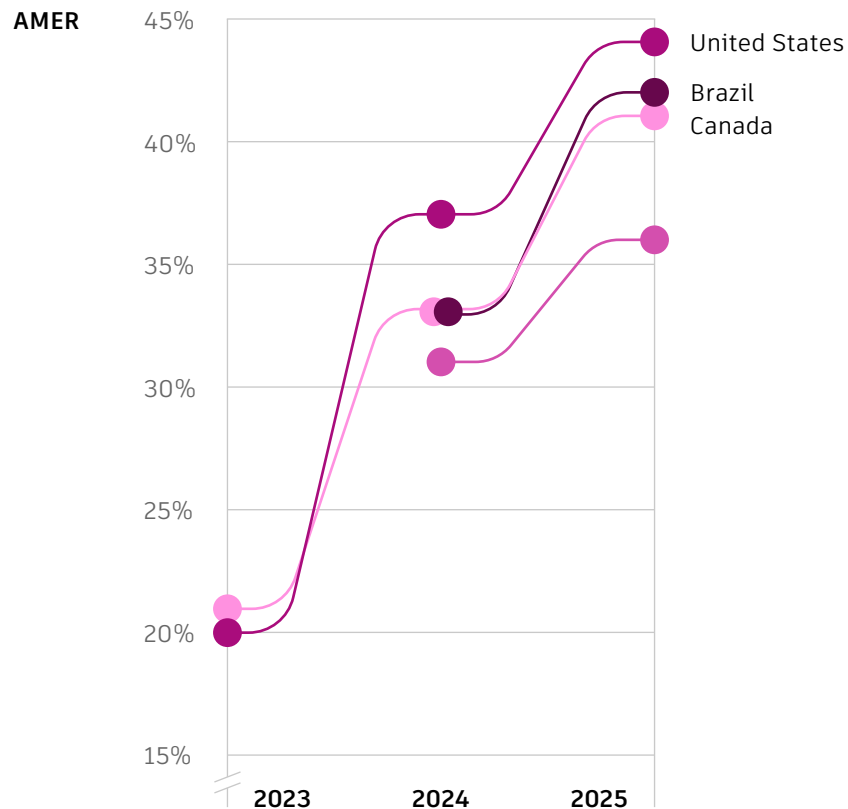
"I'm excited about the sustainability efforts the industry has been working towards. We're just beginning to develop the tools that can support where we want to be, and it's exciting to see technology get to the point where we can start to meet sustainability goals."

BRIAN ALTING
Principal and Director of Technology, Moody Nolan,
an architecture design firm headquartered in the United States

Percentage of respondents who selected "Used AI to be more sustainable." Survey question: What changes has your company or organization already made to be more sustainable? Select all that apply. 12 response options.

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The AI hype cycle meets reality

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Since the introduction of ChatGPT in late 2022, businesses have been racing to tap the potential of AI, making it a strategic priority across industries. *2024 State of Design & Make* survey results underscored this enthusiasm, with 81% of leaders in AMER saying that AI would enhance their industry.

But the reality of AI hasn't yet lived up to the hype, according to leaders in Design and Make industries. Sentiment toward AI and other emerging technologies is down significantly year over year, with just 73% of business leaders in AMER saying AI will enhance their industry—representing a 10% drop from 2024. Industry disruption from AI is also a major concern, with nearly half of leaders now agreeing that AI will destabilize their industry.

This global drop in sentiment across industries signifies that AI is following the classic tech hype cycle, as leaders face the reality of implementation, an ongoing technical skills shortage, and the limitations of the current technology.

In AMER,
47%
agree AI will destabilize their industry

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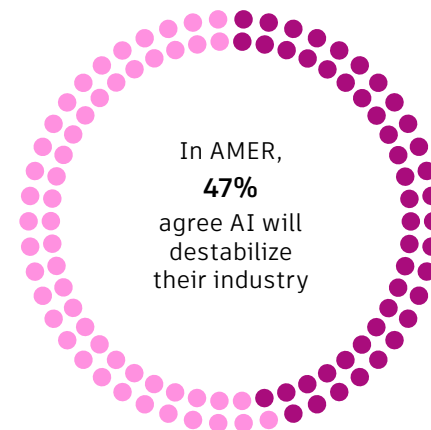
> *"Certainly, there are AI tools that help with creativity, but I don't think AI will ever take over an engineer or a scientist or a designer's job. I think AI will be a fantastic assistant and boost efficiency and productivity."*

BLAINE BUENGER
Technology Director, Infrastructure Solutions, Foth, a science, engineering, and technology company headquartered in the United States

Nearly half (47%) of leaders and experts in AMER agree AI will destabilize their industry, up from 41% in 2024, and representing a 15% year-over-year increase. This indicates leaders are becoming more concerned about AI and emerging technology as its implementation in their industry, and at their organizations, grows.

From the standpoint of digital maturity, there is a stark difference in perceptions of disruption. Digitally mature companies are more likely to say that AI will destabilize their industry (50%) compared to less digitally mature companies (44%). This makes sense when considering that digitally mature organizations will have more processes, systems, and workers impacted by AI implementation.

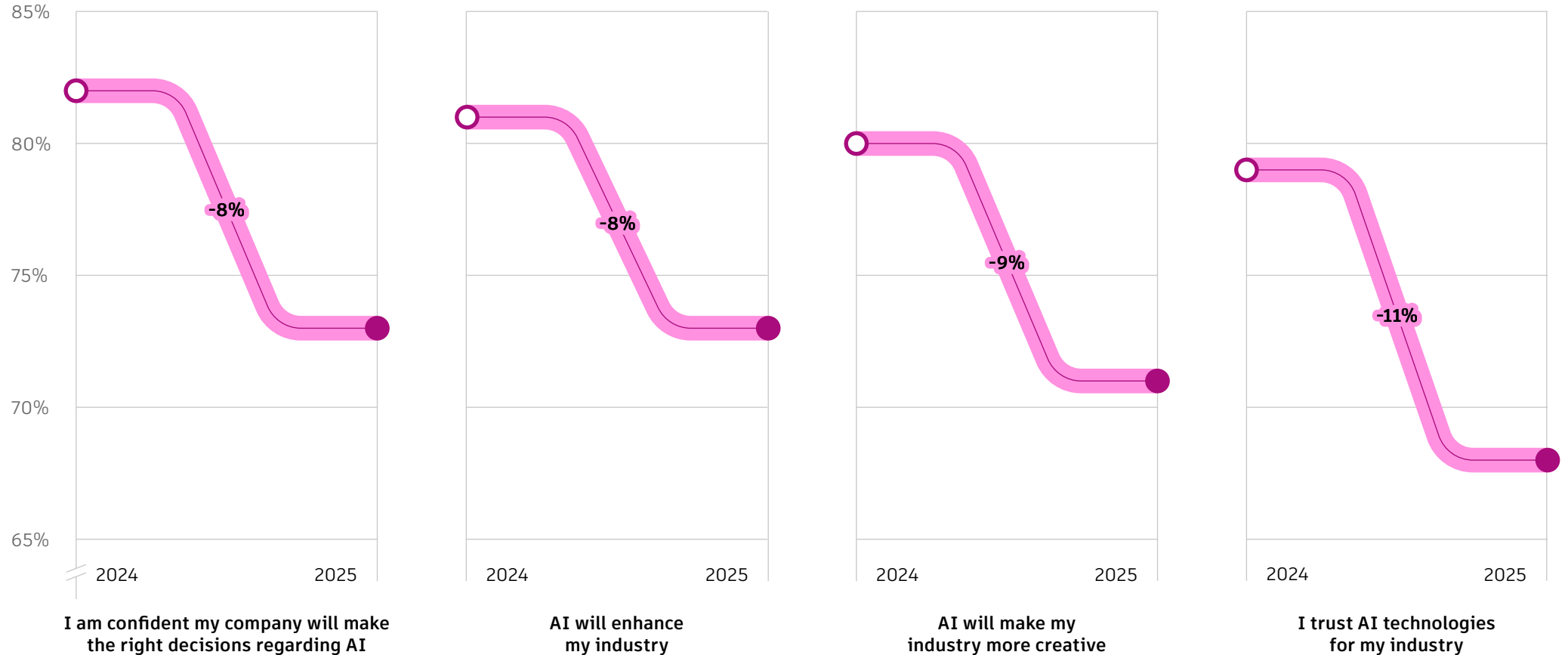# Concern about AI-related industry disruption is up

Nearly half of business leaders agree AI will be destabilizing
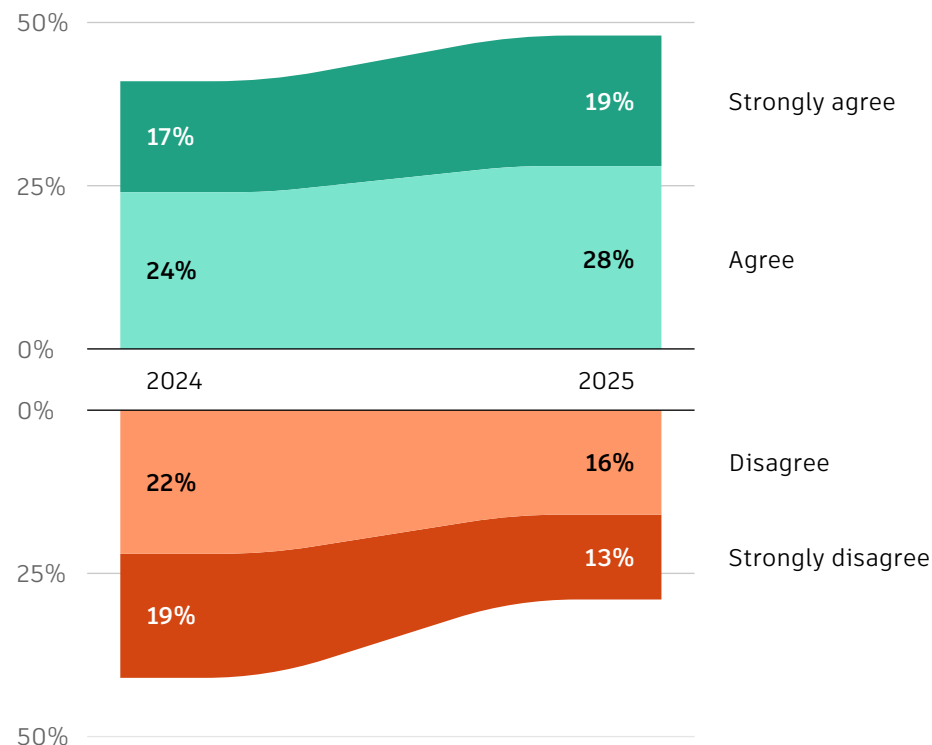
AMER respondents. Survey question: When you think about artificial intelligence (AI) in your industry and company, to what extent do you agree or disagree with the following? 5-point scale. Data for "neither agree or disagree" not shown.

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AI sentiment is down across the board

I am confident my company will make the right decisions regarding AI — -8%

AI will enhance my industry — -8%

AI will make my industry more creative — -9%

I trust AI technologies for my industry — -11%

AMER respondents. Percentage of respondents who agree to statements: 1. AI will enhance my industry. 2. AI will make my industry more creative. 3. I am confident my company will make the right decisions regarding AI. 4. I trust AI technologies for my industry. Survey question: When you think about artificial intelligence (AI) in your industry and company, to what extent do you agree or disagree with the following? 5-point scale. Top two = agree.

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Concern about disruption is up and overall positivity about AI has dropped significantly from 2024. Notably, trust in AI technology for Design and Make industries in AMER has decreased 11 percentage points year-over-year, representing a 14% change in sentiment.

One of the many reasons for this sharp decline is concern about cybersecurity incidents; privacy issues; biased or harmful outcomes; and limited control over how, where, and when their data is used. For example, organizations struggle to manage how to use third-party AI tools without exposing their sensitive data or sensitive customer data. Also challenging is the implementation of AI solutions across the organization, both in terms of time and money. In interviews, leaders said that in some industries or regions, AI regulations are lagging behind the pace of technology, leaving businesses in a difficult position when it comes to implementation, limitations on use, and liability.

> *"AI presents exciting opportunities but also raises challenges, such as ensuring originality, privacy and accountability. As we integrate AI into construction, we must prioritize transparency, creativity and ethical use to harness its full potential responsibly, with a focus on augmenting and not displacing people. Where I see limitations in AI is the mediocrity in the results it produces and the lack of transparency to the underlying data and therefore trust. If I also start to think about the growing number of sole purposes bots, agents and models that are starting to emerge, I see a similar pattern to the tech bubble of sole-focused websites that rapidly emerged at the dawn of e-commerce. My prediction is that AI will be most disruptive to existing search engine and SaaS business models."*

MICHAEL ZEPPIERI
Vice President, Emerging Technology, Skanska, a global project development and construction

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AI journeys adjust to reflect implementation realities

● Not started　　● Early stage　　● Middle of the effort　　● Approaching goal　　● Achieved goal

AMER:

2024

| 4% | 13% | 22% | 52% | 9% |

2025

| 6% | 23% | 31% | 31% | 9% |
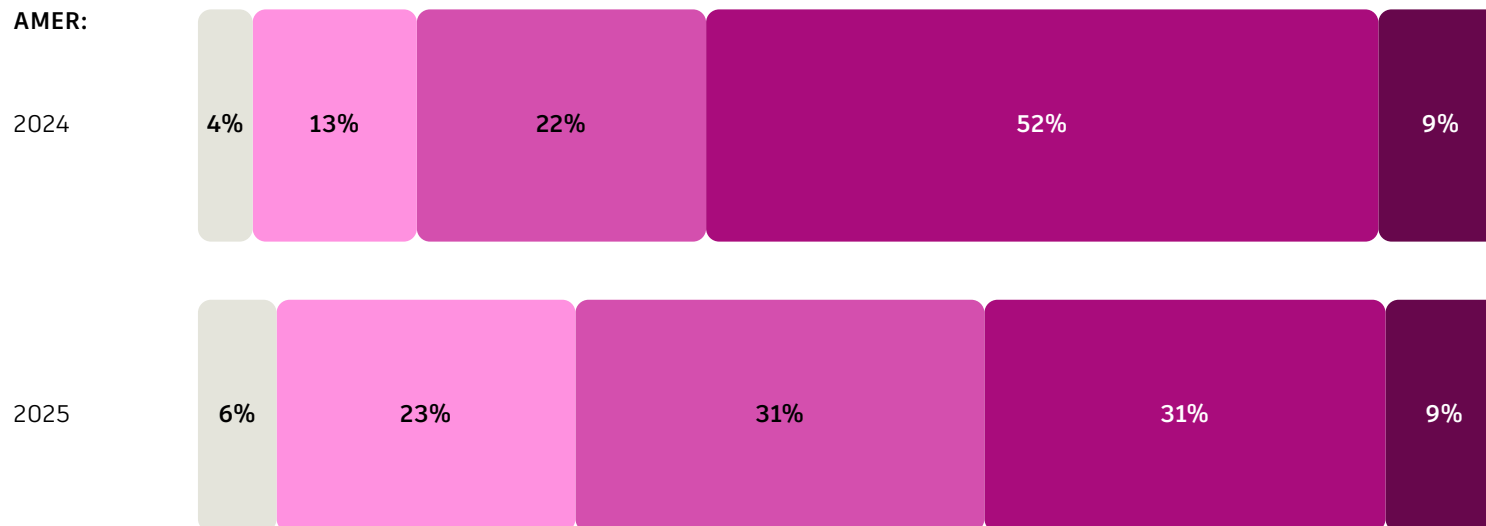
Survey question: Where is your company or organization in incorporating artificial intelligence (AI) technology?
5 point scale.

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In 2024, leaders in AMER were confident about progress toward reaching their AI goals, with 61% saying they were approaching or had already achieved their goals. This year, as leaders are faced with the complexities of implementing AI solutions across their organizations, they are rethinking where they are on their AI roadmaps.

Only 40% of leaders in AMER say they are approaching or have achieved their AI goals, a 21-point decrease that represents a 34% decline year-over-year. Leaders are more conservative this year when es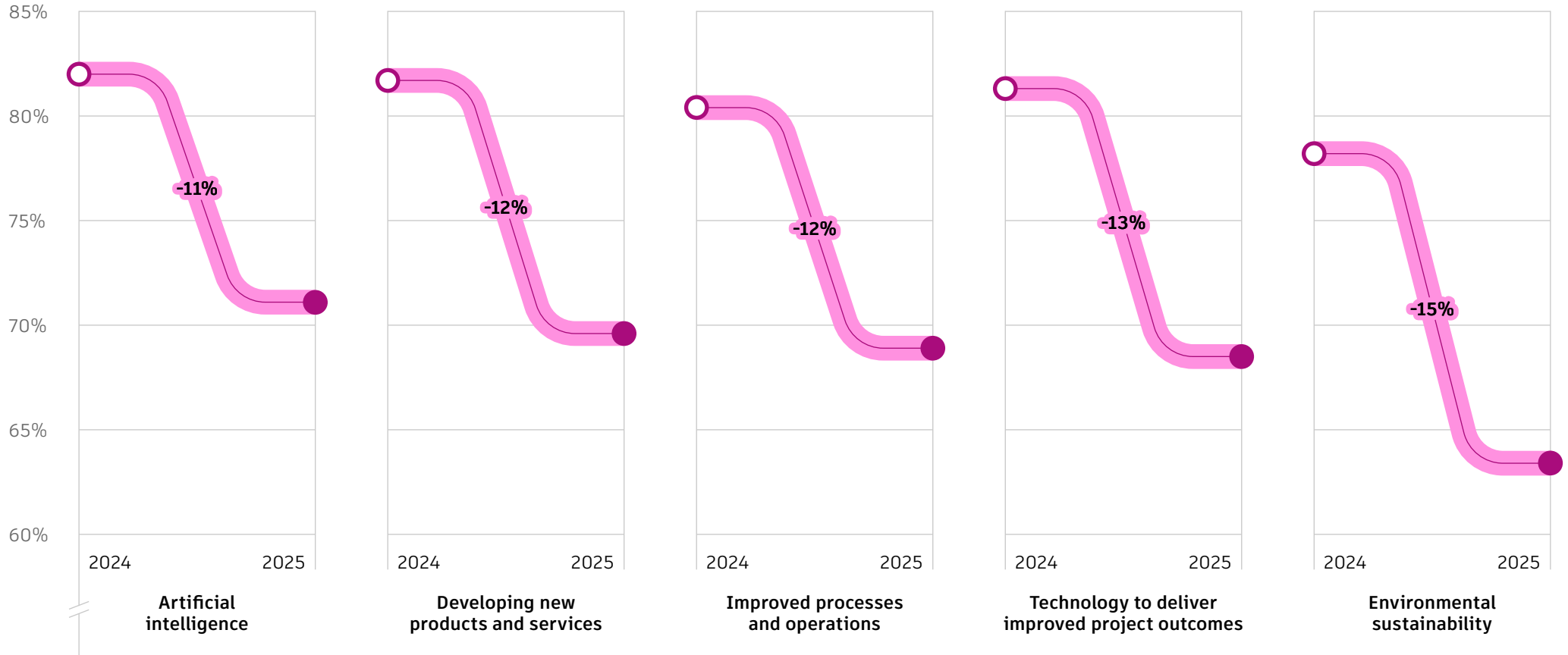timating their progress, with a 54% increase in leaders who say they are in the early or middle stages of their AI journey. Along with other survey results, this finding suggests that leaders could be struggling to progress with AI as they encounter a confluence of cost, talent, and time concerns, and that the technology is not quite mature enough to easily implement across organizations as leaders hoped.

Their response is to invest, but there is a stark divide in who is betting big on AI. Eighty percent of leaders at digitally mature organizations in AMER say they will increase investment in AI, compared to 63% at less digitally mature companies. These increased investments could lead to outsize benefits for more digitally mature organizations who are already seeing benefits in hiring, productivity, and innovation from digital transformation efforts.

Despite implementation challenges and a dip in sentiment, Design and Make leaders in AMER are still optimistic about AI's potential. When asked how their organization's investments will shift over the next few years, 71% of respondents say their investments in AI will increase.

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Investments dip overall but remain high in AI

85%

80%

75%

70%

65%

60%

-11%
2024 — 2025
**Artificial
intelligence**

-12%
2024 — 2025
**Developing new
products and services**

-12%
2024 — 2025
**Improved processes
and operations**

-13%
2024 — 2025
**Technology to deliver
improved project outcomes**

-15%
2024 — 2025
**Environmental
sustainability**

AMER respondents. Survey question: How do you think your company or organization's investment in the following will shift in the next 3 years?
5-point scale. Top two = increase. Drop = Increase for 2024 minus 2025.

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Cost, tech, and talent are top concerns

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In the wake of a year of geopolitical and economic turmoil, continued inflation, and supply-chain fragility, it's not surprising that cost control is top of mind for leaders in Design and Make industries, with 34% in AMER citing it as their main business challenge.

Spending is down in nearly all categories, from technology to talent, as leaders hope to mitigate the continued challenges of a post-pandemic economy. This dip in future investments could compound both talent and technology troubles, as organizations will struggle to do more with less.

Cost control is the top global challenge

AI and other emerging technologies a close second
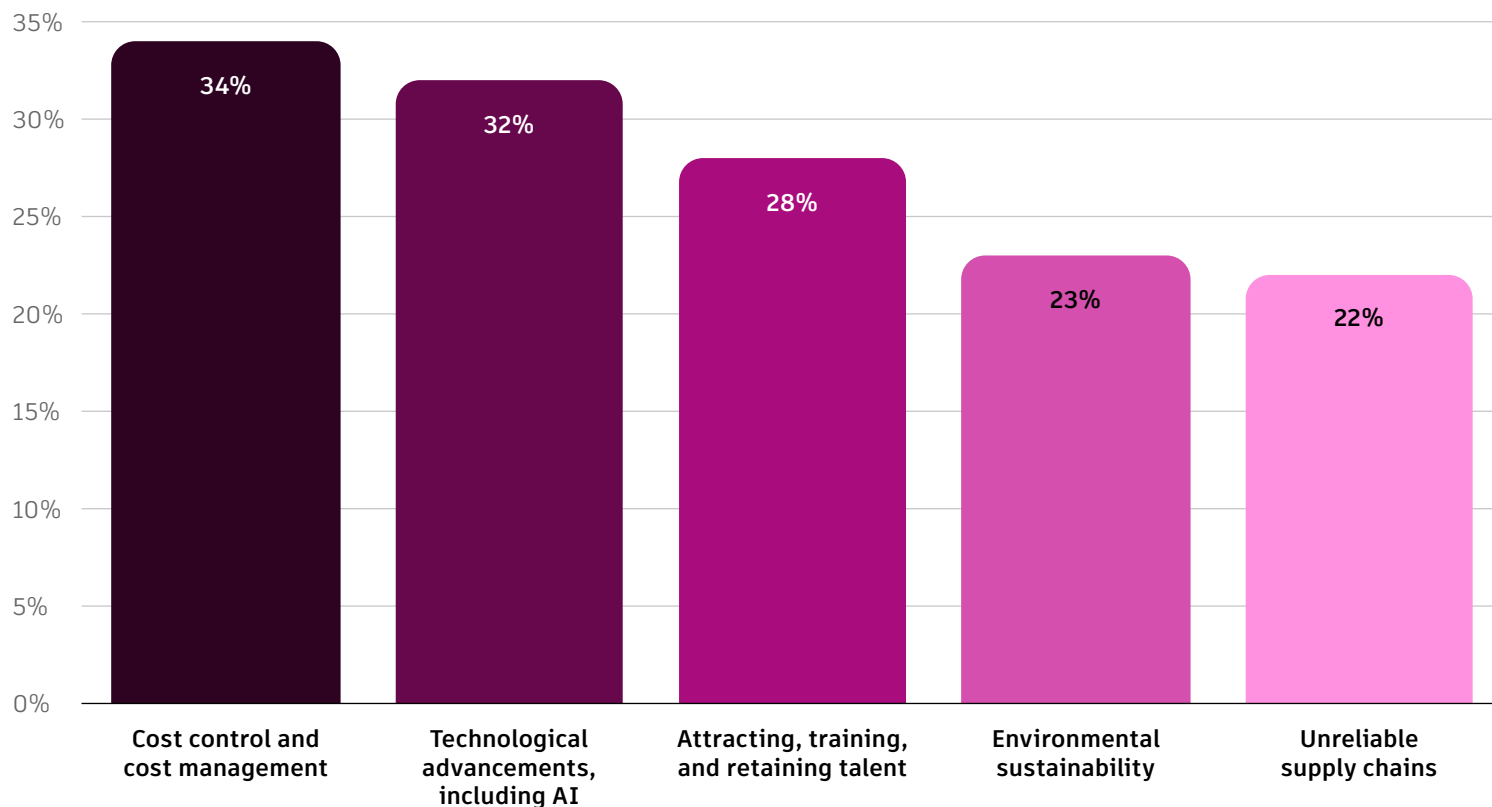
AMER respondents. Survey question: What are the top three challenges your company or organization faces today? Select up to three. 12 response options.

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Thirty-two percent of leaders in AMER identify technological advances (including AI) as a top challenge as their organizations struggle to implement new and emerging technologies. Cost-control measures will likely have a downstream impact here and could affect how quickly companies are able to reach their technology and digital transformation goals.

Ironically, cutting investment in technology can have a negative impact on budgets because new tools and processes can often lead to greater efficiencies across the organization. For instance, leaders at data-effective organizations see cost as less of a challenge—just 27% identify it as a top concern compared to 35% at other organizations.

Talent remains a perennial struggle, identified by 28% of leaders as a top challenge at their organization. The search for skilled talent is especially difficult, with nearly two-thirds of leaders saying they struggle to find the skills they need. Exacerbating the talent crunch is the growing number of organizations that are letting people go because they lack the right technical skills, further widening their talent gap.

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"I think our biggest issues now are cost and the new processes that we are trying to implement at the company."

VINICIUS PRATA
Leader of the Power Generation BIM Committee, Eletrobras, an electric power generation and transmission company headquartered in Brazil

In contrast with global results this year, the Americas are split on their view of top challenges.

While cost control is the concern most likely to be listed as a top challenge among respondents in the United States (36%) and Canada (41%), respondents in both Brazil and Mexico are more concerned about AI implementation than cost.

Americas split on top organizational challenge

AMER: ● Cost control and cost management ● Technological advancements, including AI

Canada — 41% / 30%
United States — 36% / 26%
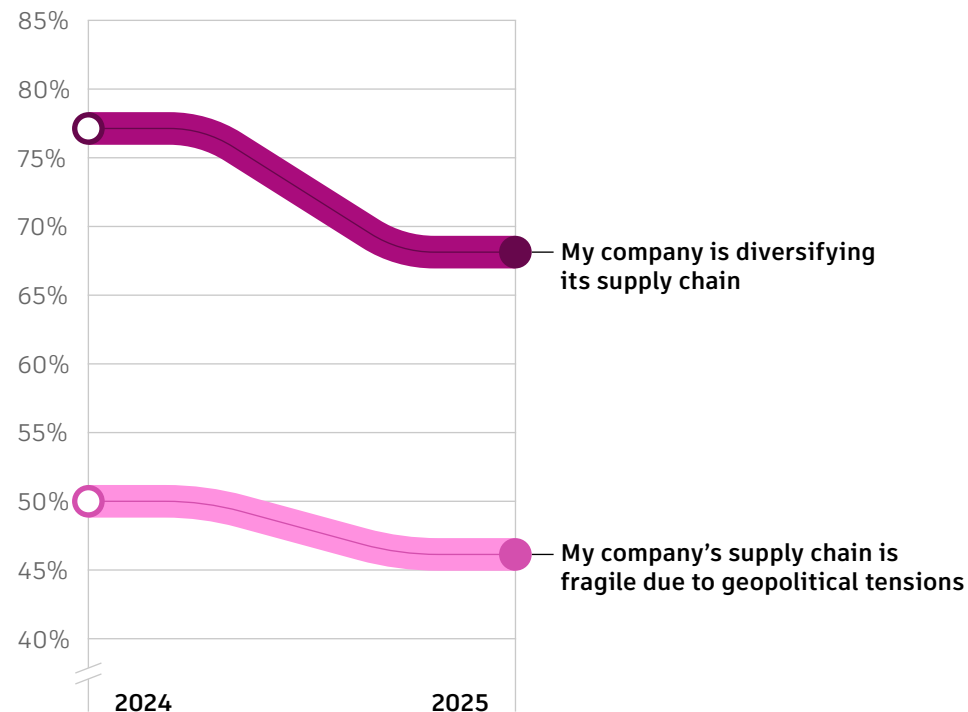Mexico — 27% / 37%
Brazil — 26% / 42%
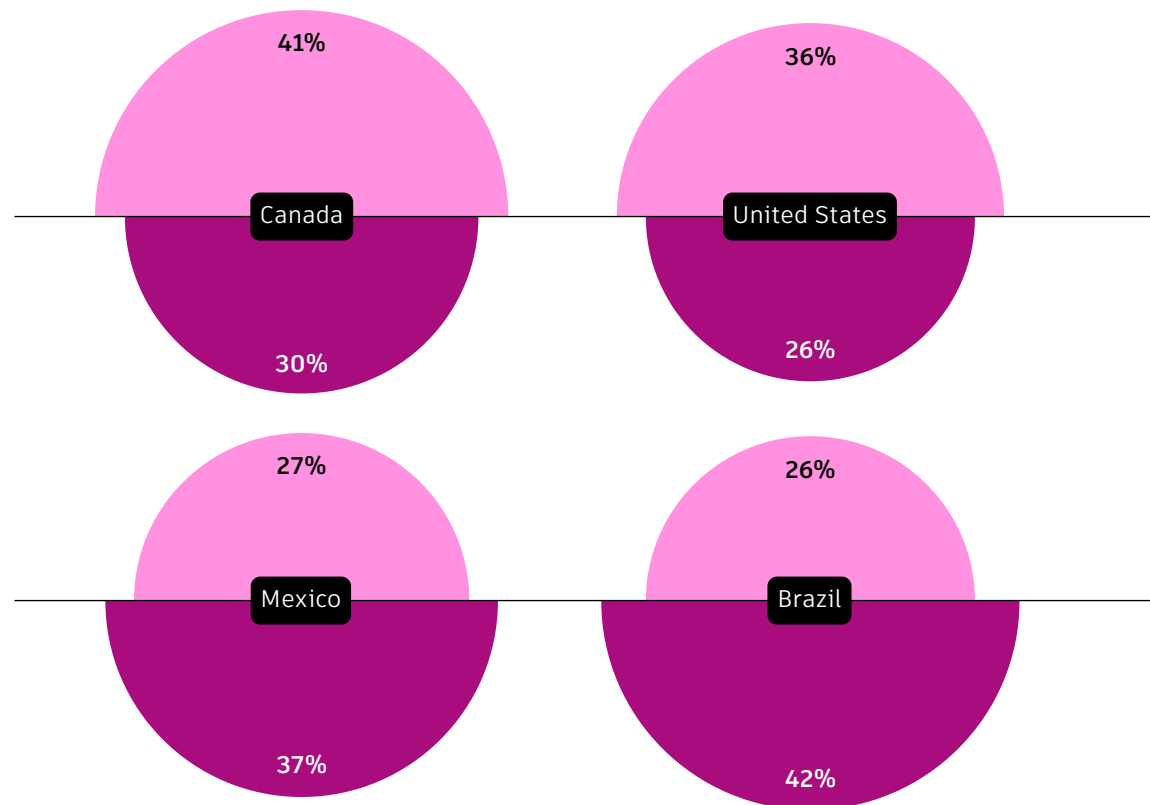
Percentage of respondents who selected "cost control and cost management" and "technological advancements, including AI" as their top challenge.
Survey question: What are the top three challenges your company or organization faces today? 13 response options.

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Supply chains remain fragile and undiversified

Supply-chain diversification is down despite increased global uncertainty

My company is diversifying its supply chain

My company's supply chain is fragile due to geopolitical tensions

AMER respondents. Percentage of respondents who agree to the statements: 1. My company's supply chain is fragile due to geopolitical tensions. 2. ...to be more resilient... My company is diversifying its supply chain. 5-point scale. Top two = agree.

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Digitally mature companies 23% more likely to diversify their supply chains

90%

80%

70%

60%

50%

2024

2025

Digitally mature companies

Less digitally mature companies
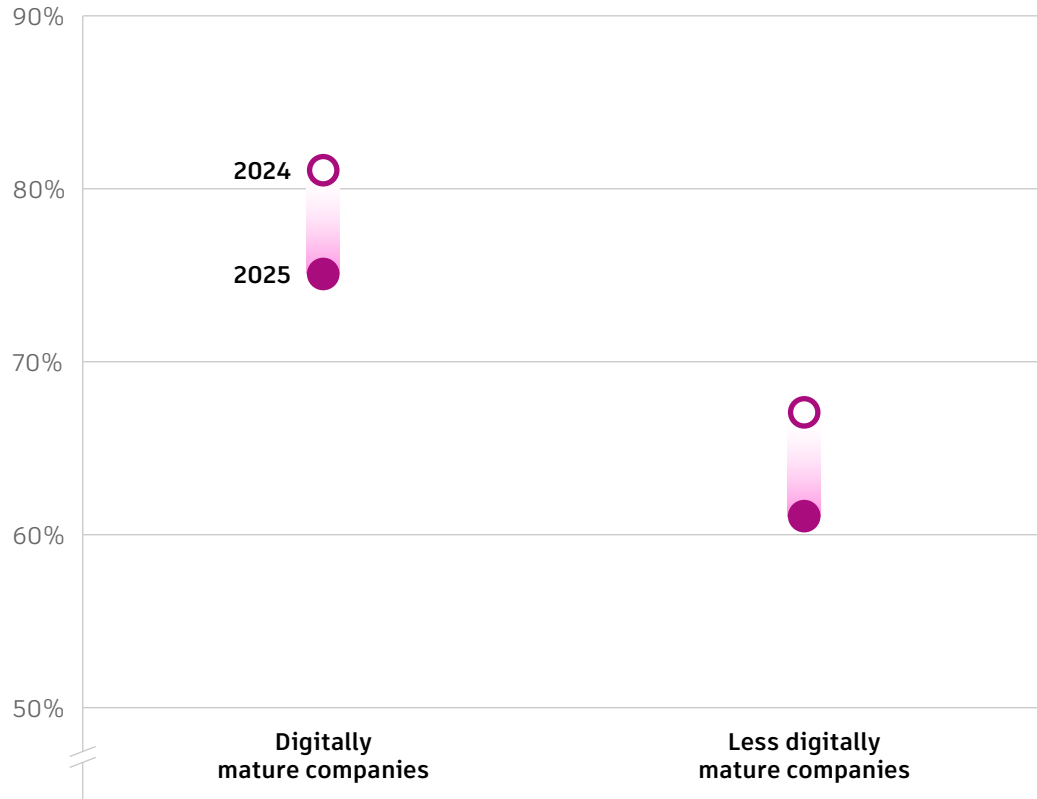
AMER respondents. Percentage of respondents who agree to the statements: ...to be more resilient... My company is diversifying its supply chain. 5-point scale. Top two = agree. For the definition of digital maturity, see glossary.

Supply-chain reliability continues to be a concern, with 46% of business leaders in AMER saying their supply chain is fragile due to geopolitical tensions.

Despite this fragility, there is an industrywide decline in the percentage of leaders who say their organizations are diversifying their supply chains. This year saw a 9-point drop (to 68%) in the number of leaders saying their company is diversifying their supply chains.

During interviews, leaders cited the cost of diversification, competing demands within the organization, and the lack of alternative options to their current supply chain as ongoing struggles with supply-chain resilience.

But one additional and critical factor companies need to consider when it comes to supply-chain stability is digital maturity. Survey results this year revealed that digitally mature organizations in AMER were 23% more likely to diversify their supply chains—giving them a significant edge when it comes to resilience.

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Leaders are cautious in the near term

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This year saw a general cooling of sentiment across Design and Make industries, with the majority of business leaders feeling both more uncertain about the future and less prepared to handle unforeseen changes.

In AMER, 63% of leaders surveyed for this year's report agree that the global landscape is now more uncertain, a 5-point jump that represents a 9% increase year over year. Leaders are also less confident in their organization's ability to weather unforeseen obstacles, with just 67% saying they are well prepared, down from 76% in 2024.

This conflation of uncertainty and unpreparedness is having far-reaching impact across Design and Make industries. From a general reduction in spending to decreased enthusiasm for new technologies, leaders are experiencing a lack of organizational confidence.

Leaders feel the future global landscape is <u>more uncertain</u>

+5 points
from 2024

Leaders feel <u>less prepared</u> to handle unforeseen future changes

−9 points
from 2024

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The United States and Brazil both saw roughly 10-point increases in the number of respondents who agree that the future global landscape feels more uncertain. And the United States is also feeling less prepared than the previous year, with 69% of leaders saying they feel prepared to handle unforeseen changes, a decrease of 11 points.

In Mexico and Canada, the trend was reversed. In Mexico, slightly fewer (56%) agree that uncertainty is greater now compared to the survey a year earlier (59%). In Canada, the difference was more significant. In 2024, 72% of survey respondents in Canada agreed that the future felt more uncertain; in this year's survey, only 60% agree, signaling that Canada is one of the few regions optimistic about the current global landscape.

The United States sees the biggest decrease in preparedness, Canada the largest decrease in uncertainty

AMER: ● My company is well prepared to handle unforeseen future changes ○○ 2024
● The future global landscape feels more uncertain now than 3 years ago ●● 2025
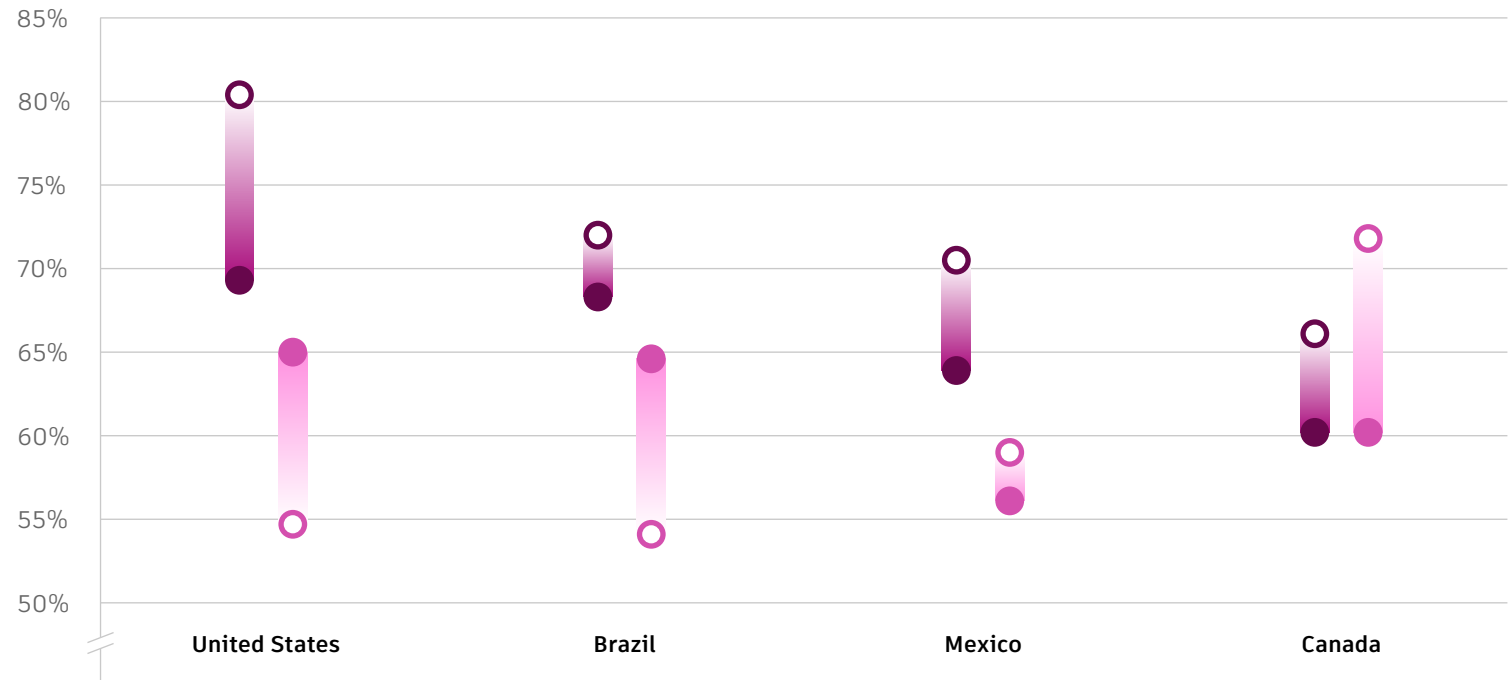
Percentage of respondents who agree to statements: 1. My company is well prepared to handle unforeseen future macroeconomic and geopolitical changes. 2. The future global landscape feels more uncertain now than 3 years ago. 5-point scale. Top two = agree.

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# The search for talent intensifies, with a focus on AI skills

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Design and Make industries have struggled in recent years to find skilled talent, and this year that struggle has become acute enough to hinder growth. In AMER, 56% of business leaders say that lack of access to skilled talent is a barrier to their company's growth, up from 46% in 2024.

When it comes to bridging and filling the skills gap, digitally mature companies are at a distinct advantage. Eighty percent of digitally mature companies in AMER will invest more in digital training, compared to 64% of less digitally mature companies. They are also more likely to implement continuous learning programs than less digitally mature companies, at 76% and 61% respectively. Digitally mature companies also see a boost when it comes to talent. In AMER, 29% of digitally mature companies report improved talent acquisition and retention as a benefit of digital transformation compared to only 18% of less digitally mature companies.

61% in AMER say they have difficulty finding employees with the right skills
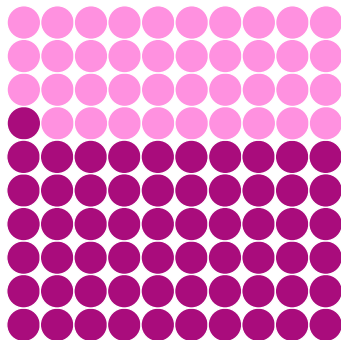
Sixty-one percent of business leaders in AMER agree that new employees with the right technical skills are difficult to find, up from 51% the previous year. Moreover, the number of leaders who say they have had to let people go because they lack technical skills has jumped to 50%, up from 41%, compounding labor shortage problems.
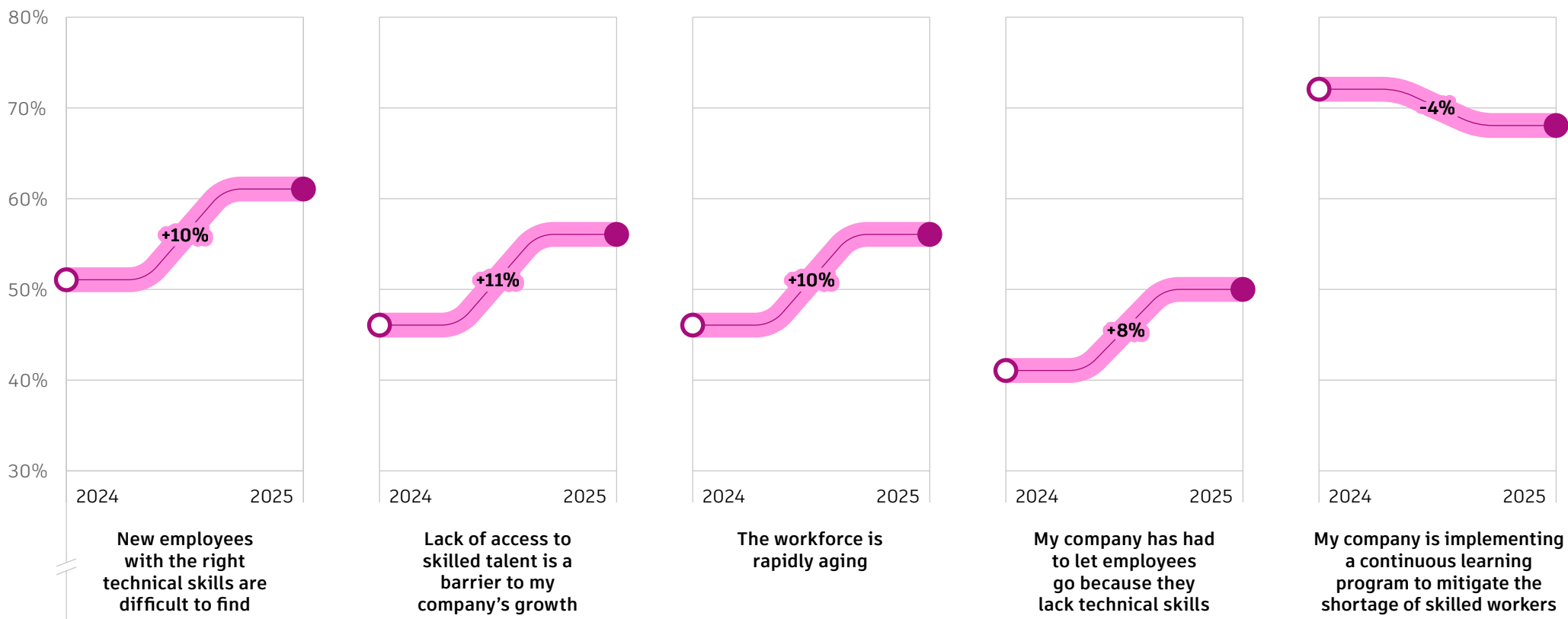
"We do a lot of work with universities, and this has been a great pipeline for new and emerging talent. We have a robust internship program—500 just last year—and we look at the interns as future employees. It ensures they have the technical skills we need, and also that they will already fit into our culture."

JEFF SIEGEL
Digital Infrastructure Solutions Delivery and Organizational Growth Officer, Senior Vice President, and HNTB Fellow, HNTB, a transportation infrastructure design firm headquartered in the United States
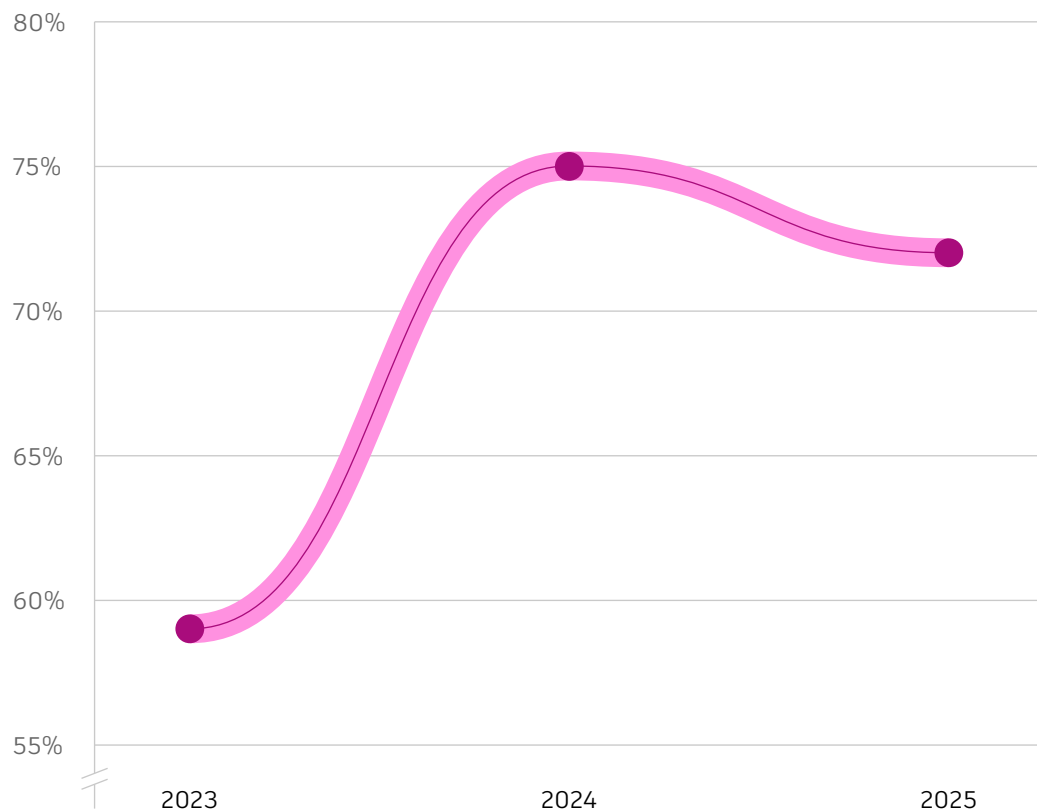
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Nearly two-thirds of organizations are confronting a skills gap

36% year-over-year increase in leaders who say they struggle to find candidates with the right technical skills

New employees with the right technical skills are difficult to find — +10%

Lack of access to skilled talent is a barrier to my company's growth — +11%

The workforce is rapidly aging — +10%

My company has had to let employees go because they lack technical skills — +8%

My company is implementing a continuous learning program to mitigate the shortage of skilled workers — -4%

AMER respondents. Percentage of respondents who agree to statements: 1. New employees with the right technical skills are difficult to find. 2. My company has had to let employees go because they lack technical skills. 3. Lack of access to skilled talent is a barrier to my company's growth. 4. The workforce is rapidly aging. 5. My company is implementing a continuous learning program to mitigate the shortage of skilled workers. 5 point scale. Top two = agree.

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Despite the skills gap, investment in training is down

One way to bridge the skills gap is to invest more in workforce training through continuous learning programs, but implementation of continuous learning programs has declined to 68%, down from 72% in 2024.

Budget aside, training holds other challenges. In AMER, 44% of respondents say they do not have the resources to design internal training programs, up 8 points over last year, indicating that the tight labor market is impacting initiatives across organizations.

Confronted by multiple implementation obstacles, some organizations are turning to third parties to train their employees. While external training programs seem like an ideal solution for those organizations tight on resources, their efficacy remains in doubt, with 50% of leaders saying these do not meet the needs of their organization.

AMER respondents. Percentage of respondents who agree to the statement: In the next 3 years, my company is planning to invest more in digital skills training. 5 point scale. Top two = agree.

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Investments remain strong but reflect uncertainty

08

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Future investment projections have fallen this year but are still robust—71% of business leaders in AMER say their organizations will increase or strongly increase their investments over the next three years. While this reflects confidence in the future, this number is down from 86% last year, indicating that leaders are being more conservative in an uncertain geopolitical and macroeconomic environment.

However, digitally mature organizations are significantly more bullish on the future, with 81% of leaders planning to increase future investments, compared to 61% at less digitally mature companies.

Further, future investments are higher at data-effective companies, where 87% of leaders say they will increase future investments. This indicates that organizations are seeing outsize benefits from their investments and that digital transformation efforts may have eased implementation challenges, resulting in long-term cost savings and productivity gains.
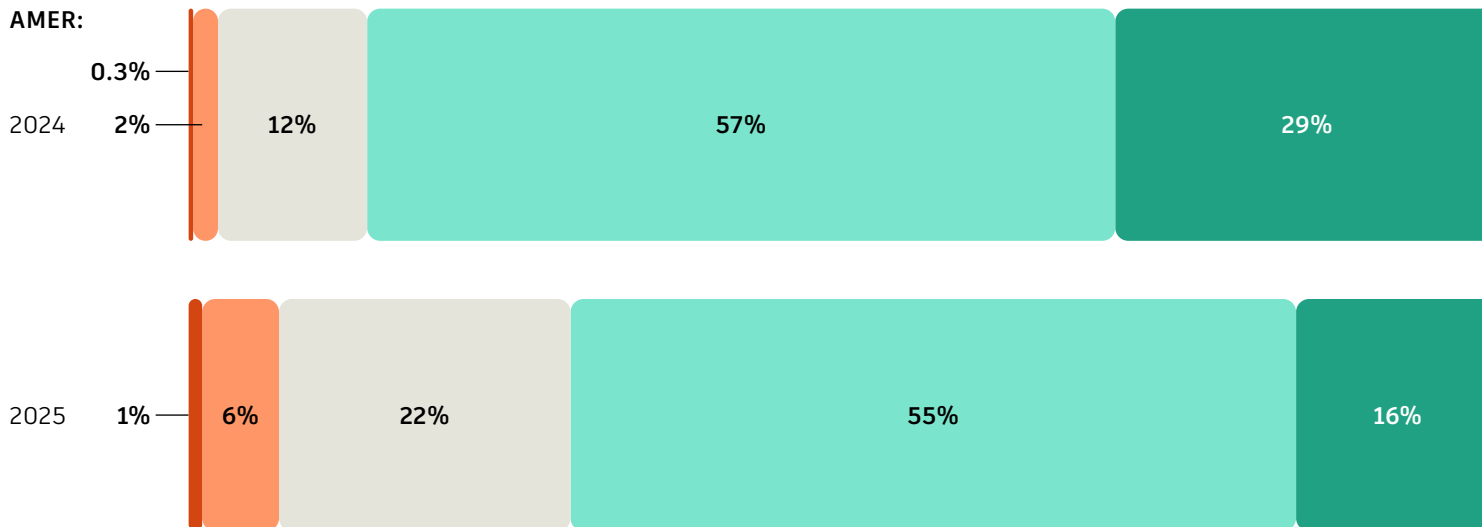
AMER businesses scale back investment plans

86%
2024

71%
2025

Increase or strongly increase investment

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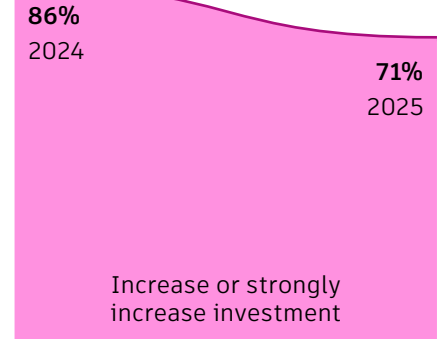
Future investments still robust

Two-thirds of organizations will increase their investments, down from 2024

● Strongly decrease   ● Decrease   ● Stay roughly the same   ● Increase   ● Strongly increase

AMER:

2024 — 0.3% — 2%

| 12% | 57% | 29% |

2025 — 1%

| 6% | 22% | 55% | 16% |

Survey question: How do you think your company or organization's level of investment will shift over the next 3 years?
5-point scale. Values do not add up to 100% due to rounding.

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In the *2024 State of Design & Make* report, the United States was especially positive, with 90% of survey respondents saying that their company's level of investment would increase over the next three years.

One year later—driven by high interest rates, among other factors—that figure is down to 73%, representing a 19% decline. Canada is similarly cautious this year, with just 58% of survey respondents saying their companies will increase or strongly increase their investments in the next three years—a 21% year-over-year decline.

"I think reduction in spending is due to the uncertainty of the economy. We want to focus on the things that we know we do well and not increase or introduce any new risk."

BLAINE BUENGER
Technology Director,
Infrastructure Solutions, Foth,
a science, engineering,
and technology company
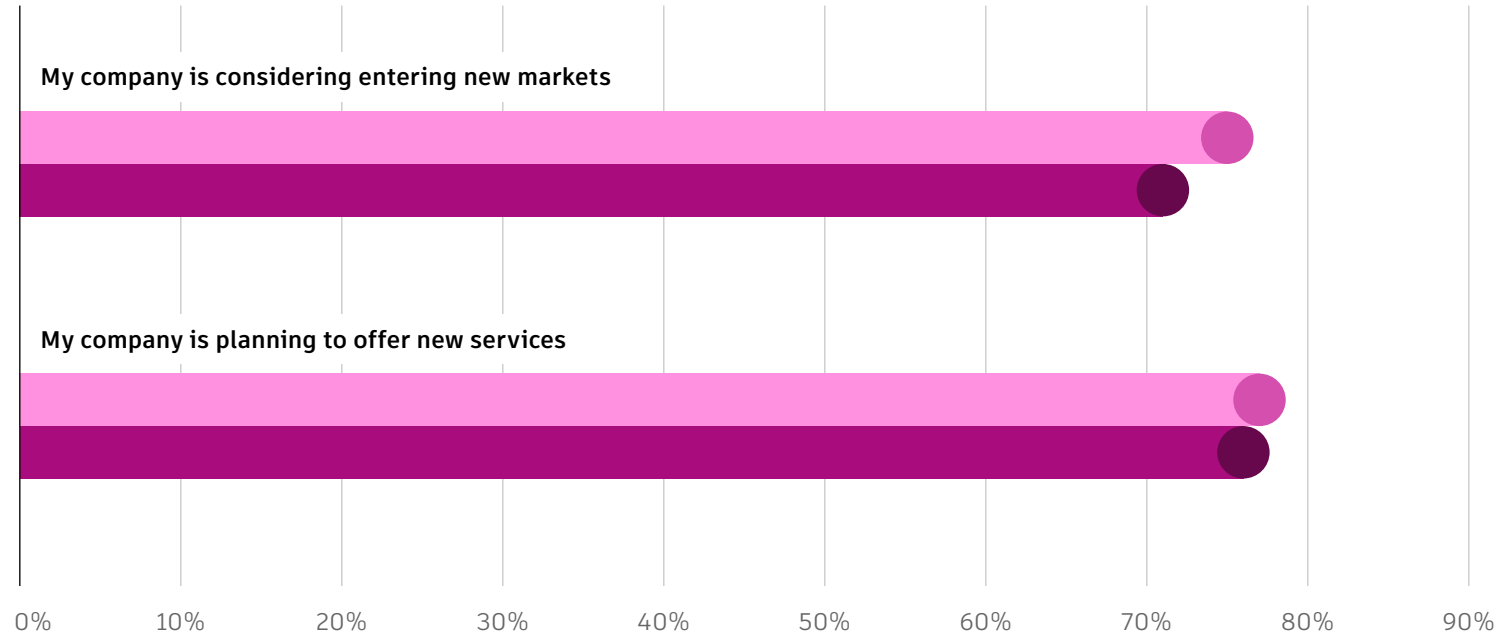headquartered in the United States

Canada and the United States see the largest decline in future investments
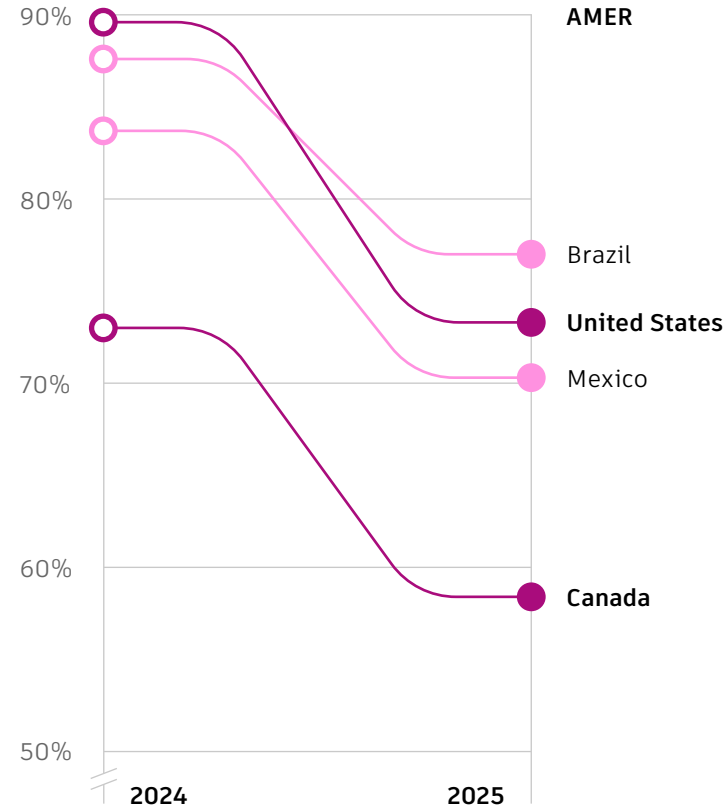
AMER

- Brazil
- United States
- Mexico
- Canada

Survey question: How do you think your company or organization's level of investment will shift over the next 3 years? 5-point scale. Top two = increase.

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Companies are pulling back on expansion efforts

AMER: ● 2024 ● 2025

My company is considering entering new markets

My company is planning to offer new services

0% 10% 20% 30% 40% 50% 60% 70% 80% 90%

Percentage of respondents who agree to statements: 1. My company is considering entering new markets. 2. My company is planning to offer new services.
Survey question: To what extent do you agree or disagree that your company or organization is doing the following to be more resilient? 5-point scale. Top two = agree.

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Most leaders in AMER surveyed for the *2025 State of Design & Make* report say their companies continue to invest in entering new markets and in offering new products and services, but at a lower rate than last year—71% say they will enter new markets this year, compared to 75% in 2024.

These findings echo the global drop in sentiment seen this year and align with efforts to control costs in the near term.

But as with so many aspects concerning Design and Make industries, digitally mature organizations are much less likely be affected by this general belt-tightening. In AMER, 79% of digitally mature companies say they are considering entering new markets, compared with 64% of less digitally mature companies. They are also more likely (84%) to offer new products and services than their counterparts (69%), and to increase investments into acquisitions (69% compared to 48%). These actions give digitally mature organizations a competitive advantage, allowing them to expand while others contract under market pressures.

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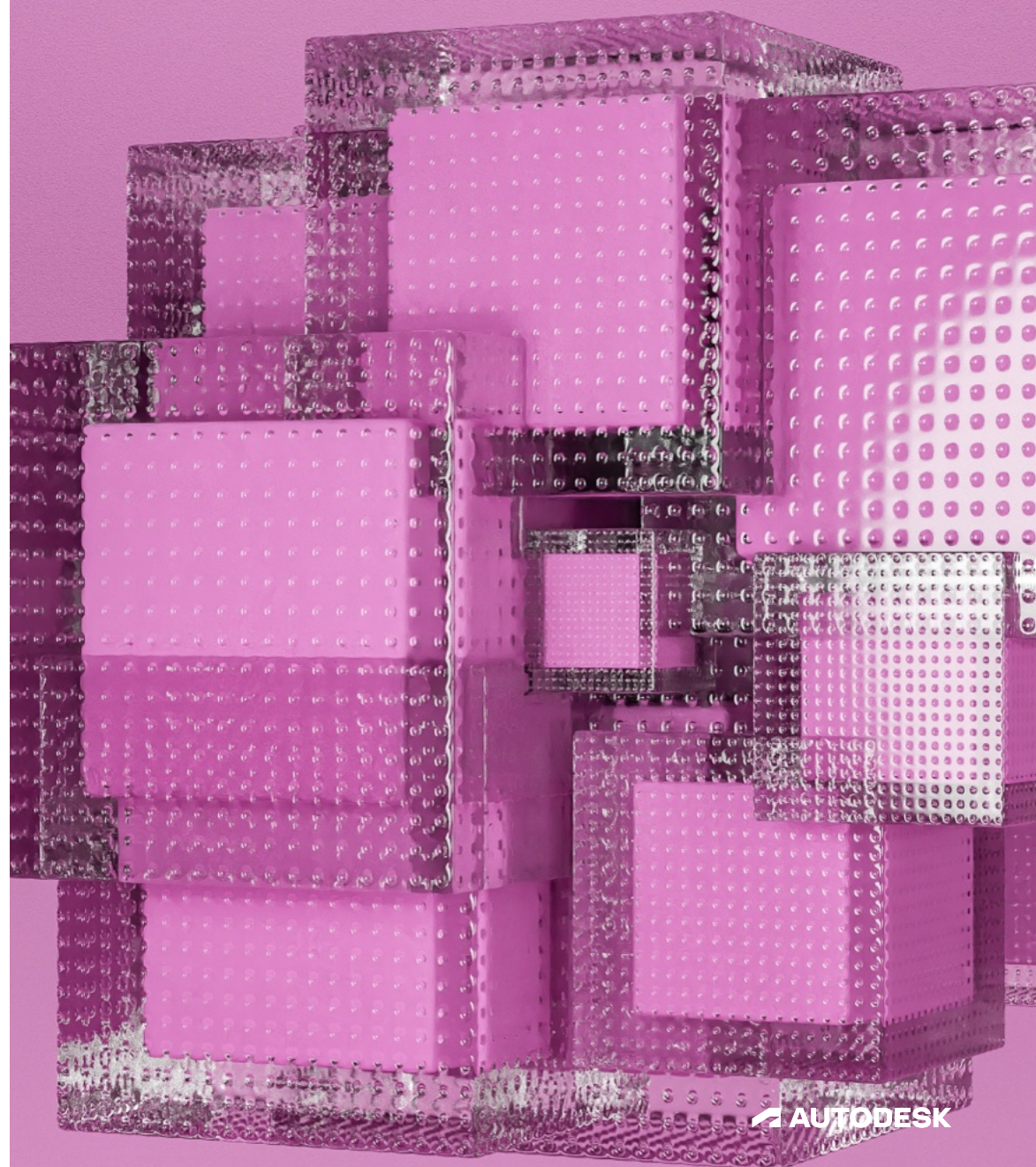
Conclusion

Regardless of recent headwinds, leaders in AMER are focused on solving today's problems with an eye toward future opportunity. While cautious in the near term, leaders that want to gain a competitive edge need to think about the long-term benefits of investing in digital transformation now—and the implications that falling behind could have across the organization.

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Methodology

For the 2025 report, Autodesk surveyed and interviewed 5,594 industry leaders, futurists, and experts in the architecture, engineering, construction, and operations; product design and manufacturing; and media and entertainment industries from countries around the globe. This report contains key findings from this research, including details at the sector and regional level.

The quantitative data in this AMER subsample (n= 937) was collected between May and August 2024 through a 20-minute online survey.[4] Autodesk partnered with Qualtrics for the collection of this data. In addition, 34 qualitative interviews with business leaders and futurists were conducted in October and November 2024.

AMER survey sample:

2025:
937 AMER respondents

2024:
1,291 AMER respondents

2023:
458 AMER respondents

AMER
937 total

- 49% United States
- 17% Brazil
- 17% Canada
- 17% Mexico

- 34% AECO
- 34% D&M
- 31% M&E
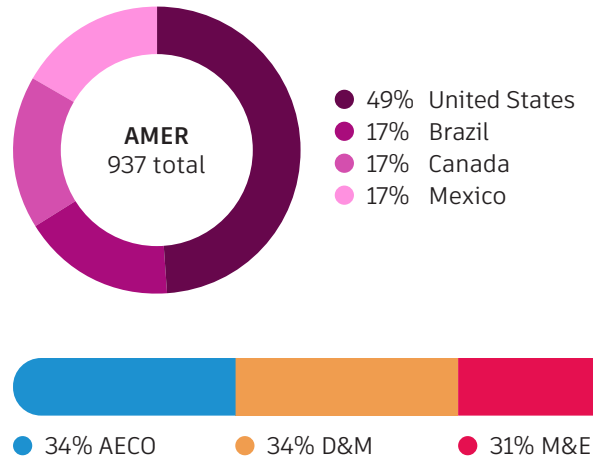
56%
of survey participants are decision-makers in their companies

11 years
is the average time of experience in their industry

35%
of respondents said that they primarily use Autodesk Design and Make software

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Glossary

Data-effective companies:
Respondents were asked, "How effective would you say your company or organization is at leveraging data?" Those who responded with "very effective" on a 4-point scale are referred to as data-effective companies. This is 20% of respondents.

Digital maturity:
Respondents were asked how far their companies were in their transformation journeys. Respondents who described their organization as "early stage" or "right in the middle" of their digital transformation journeys are considered less digitally mature companies. Those who responded "approaching the goal" or having "achieved the goal" of digital transformation are considered more digitally mature companies. Of the APAC respondents, 50% are digitally mature.

Industry:
AECO: Architecture, engineering, construction, and operations
- Architecture services
- Building owners (i.e., developers, real estate companies, governments)
- Civil infrastructure owners (e.g., transportation infrastructure, water infrastructure)
- Construction services
- Engineering service providers
- Mining
- Oil and gas
- Utilities and telecom

D&M: Design and manufacturing
- Aerospace and defense equipment
- Automotive, mobility, and other transportation (including supply chain)
- Building products and fabrication
- Consumer products
- Industrial machinery
- Life sciences manufacturing
- Process manufacturing

M&E: Media and entertainment
- Advertising, publishing, and graphic design
- Film and TV
- Games

Leaders and experts:
- *Leaders:* Fifty-six percent of survey participants are decision-makers in their companies. In this report, this group is referred to as leaders. Job roles for the leaders group include business owners/ entrepreneurs, directors, and VP- and C-level executives.
- *Experts:* The remaining 44% of respondents are referred to as experts. This group includes respondents at the nonmanagerial level and managers.

Region:
APAC: Asia-Pacific
Australia, China, India, Japan, Singapore, South Korea

EMEA: Europe, the Middle East, and Africa
France; Germany; Italy; Middle East (Saudi Arabia, United Arab Emirates); Netherlands; Nordics (Denmark, Finland, Norway, Sweden); Spain; Turkey; United Kingdom

AMER: North, Central, and South America
Brazil, Canada, Mexico, United States

Sustainability:
The survey questions about sustainability, for example, in the list of changes companies are making, focus on environmental sustainability; however, this definition was not explicitly stated.

In one-on-one interviews, a descriptive definition was used incorporating the United Nations definition: "Meeting the needs of the present without compromising the ability of future generations to meet their own needs." Respondents were told this includes efforts related to the environment (mitigating the effect on climate change); the community (social well-being, improving the life of populations); and corporate governance.

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About Autodesk

Autodesk is changing how the world is designed and made. Its technology spans architecture, engineering, construction, operations, product design, manufacturing, and media and entertainment, empowering innovators everywhere to solve challenges big and small. From greener buildings to smarter products to more mesmerizing blockbusters, Autodesk software helps customers design and make a better world for all. For more information, visit autodesk.com or follow @autodesk on social media.

Contact Autodesk at state.of.design.and.make@autodesk.com about this research report or to sign up to participate in future research programs.

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