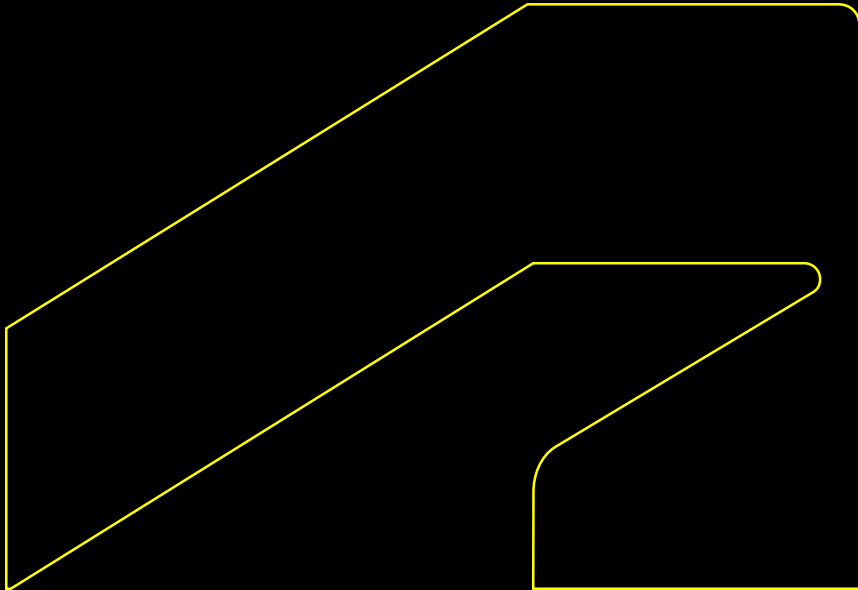


# State of Design & Make

 AUTODESK

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M&E INDUSTRY REPORT



2024  
2025  
2026  
2027

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# About the M&E 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 D&M* industry report, Autodesk surveyed and interviewed 1,670 industry leaders, futurists, and experts across media and entertainment (M&E). Survey data has been broken down by global region: Asia-Pacific (APAC); Europe, Middle East, and Africa (EMEA); and the Americas (AMER). 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.<sup>1</sup>

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.

<sup>1</sup> [World Economic Forum, 2023](#)

# Introduction

Leaders in media and entertainment 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 in M&E

Leaders were clear on the challenges they are facing.

Cost control and technological advancements are top of mind for M&E organizations amid continued inflation, increasing supply-chain fragility, and ongoing implementation challenges. Talent remains a perennial problem, with 28% of M&E 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 M&E 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 M&E are still feeling bullish in some areas as they identify opportunity amid disruption.

- Although overall investments are down year-over-year, more than two-thirds of leaders say they will increase overall future investments.
- Sustainability is experiencing a surge of optimism, with 96% of 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 M&E organizations, with applications from resource optimization to project lifecycle management.

One standout finding this year is that most leaders surveyed say digital transformation efforts led to improvements at their organizations. The majority of M&E organizations benefiting from digital transformation are seeing more than 50% improvements in categories such as customer satisfaction, innovation, and productivity. Digitally mature companies tend to invest more heavily in technology, and those investments are now paying outsize dividends during the current period of caution.



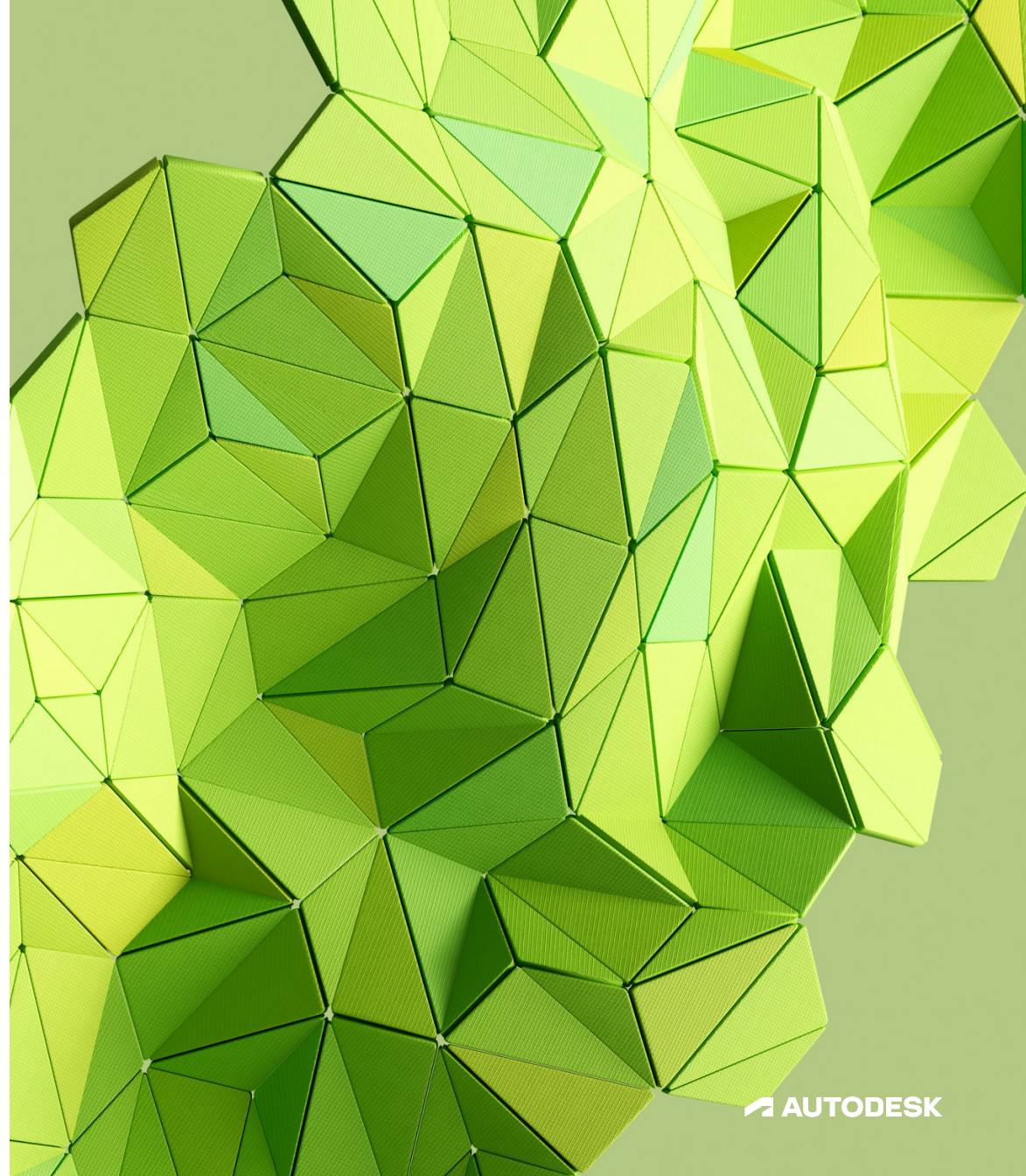
## The digital maturity difference in M&E

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 M&E organizations are 45% 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 5-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 M&E organizations 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.



Digital transformation  
efforts have an  
overwhelmingly  
positive impact

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## INSIGHT 1: M&E

Along with improvements in customer satisfaction, productivity, and innovation, leaders benefitting from digital transformation report it is also having positive effects on company reputation (72%), expansion of products and services (68%), and improved data exchange (67%).

### 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.

Respondents from digitally mature M&E companies report they are ...

**+28%**

... more likely to have experienced “above average” or “exceptional” **performance**

**+30%**

... more likely to “agree” they **are prepared** for the future

**+35%**

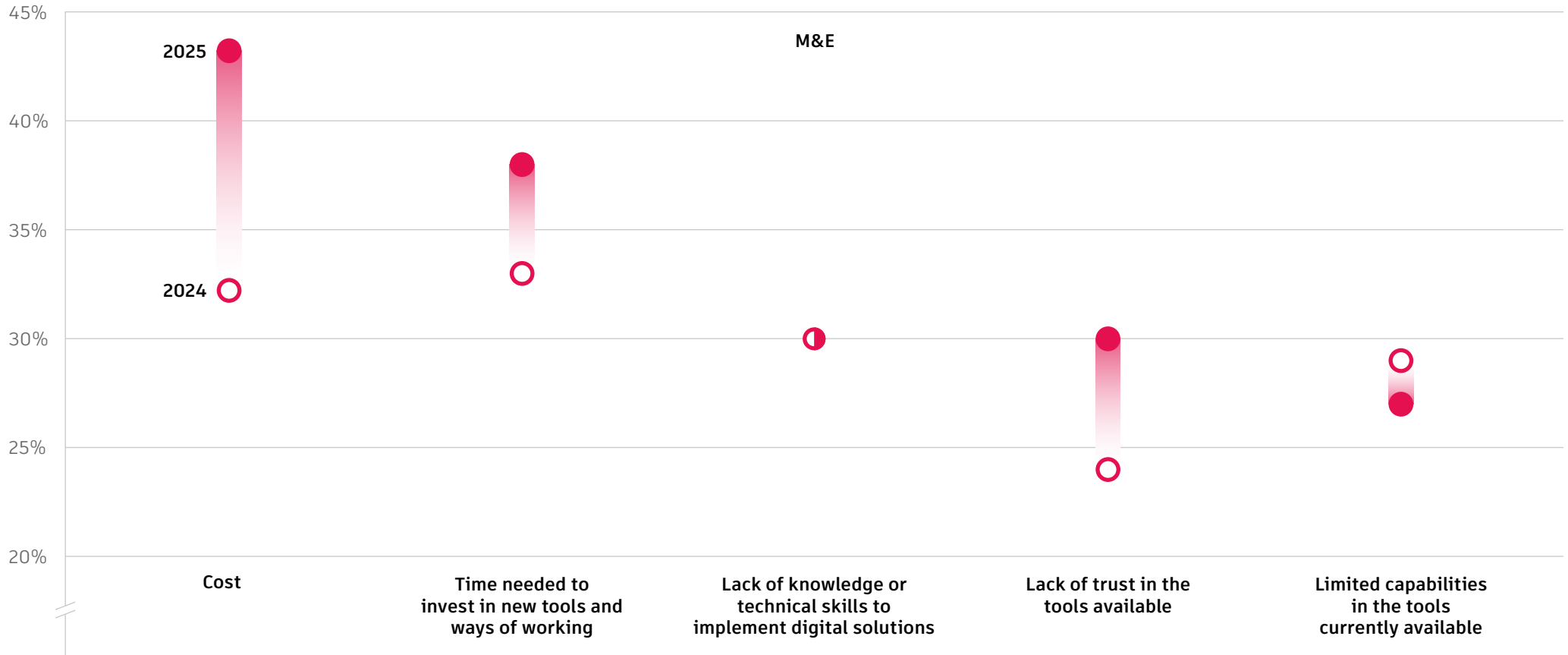
... more likely to have “increased” or “strongly increased” **investment** in the past 3 years

**+28%**

... 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.

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



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



## INSIGHT 1: M&E

The cost of digital transformation is a growing challenge for many M&E organizations, with 43% of leaders saying it's their main barrier, up from 32% last year and reflecting a global increase in concern about cost control. But given the outsized returns organizations are seeing from their digital transformation investments, cost-cutting measures could have equally outsized negative effects if they impact technology initiatives.

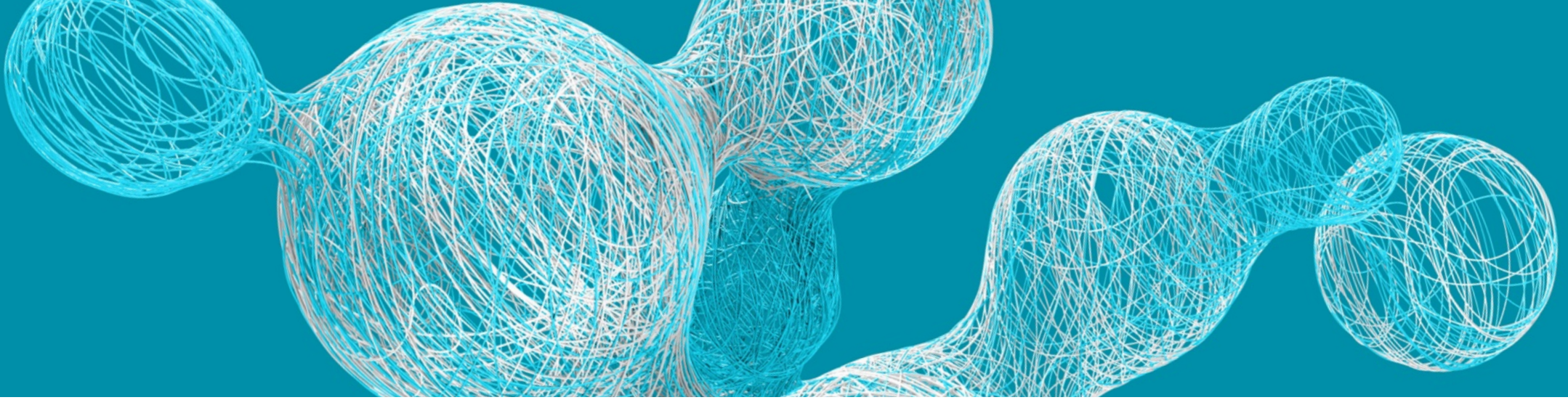
Concerns about cost are followed by the persistent challenges of time and talent, tied for second this year as the most-cited obstacles as organizations struggle to meet implementation goals while also trying to do more with fewer resources.

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. In M&E, digitally mature companies less often cite cost (41% compared to 45%), and more often cite the limited capabilities of the tools (29% compared to 25%) as a barrier. These organizations also have an advantage when it comes to talent, with 76% of leaders saying digital transformation has improved talent acquisition and retention compared to 54% at less digitally mature companies.

# Sustainability transitions from pressure to profitability

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## INSIGHT 2: M&E

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,<sup>2</sup> 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. Seventy-four percent of business leaders in M&E believe that sustainability measures can generate in excess of 5% of their annual revenue, a figure that has remained relatively strong

compared to last year (78%), despite this year's cost concerns.

While M&E organizations are still influenced by stakeholders to become more sustainable, that influence appears to be waning. For instance, this year 72% of leaders say their sustainability initiatives were influenced by customers, compared to 82% in 2024.

<sup>2</sup> [World Economic Forum, 2023](#)







## INSIGHT 2: M&E

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 M&E, the gap between leaders who see sustainability as a short-term versus long-term strategy has narrowed to just 10%, signaling that sustainability is seen as good for business overall.

Digitally mature companies are at an advantage when it comes to reaping sustainability benefits. Eighty-five percent of digitally mature M&E organizations see long-term benefits from sustainability and 76% see short-term benefits, compared to just 66% and 55% 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 57% 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 M&E companies appear to be seeing the transformational potential of sustainability across their organizations—and are likely increasing their budgets to match. Seventy-six percent of leaders say they will increase their investments in environmental sustainability, compared to just 52% at less digitally mature companies.

# AI solidifies its place as the top sustainability enabler

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### INSIGHT 3: M&E

For the second year running, AI is the top sustainability enabler for M&E, with 41% of leaders saying they use AI to be more sustainable, up from 35% last year and 25% in 2023. With nearly all organizations taking steps to be more sustainable, many are turning to AI technology to help enable sustainable outcomes.

**41%**  
of businesses in M&E have used  
AI to be more sustainable



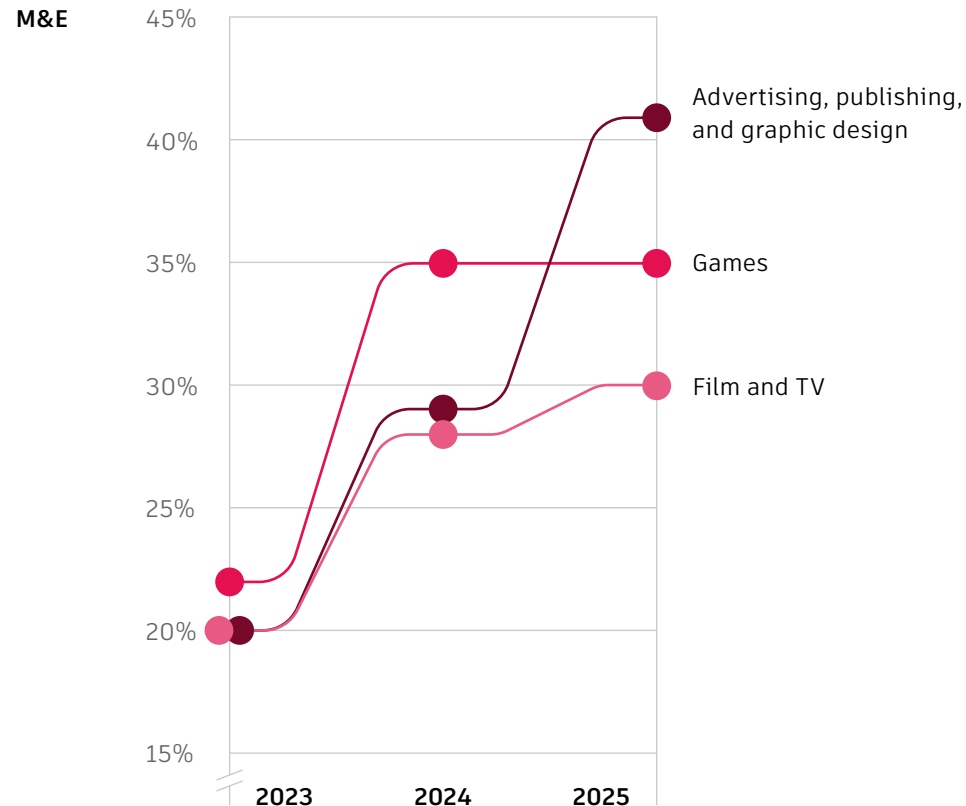


### INSIGHT 3: M&E

Not surprisingly, digitally mature companies in M&E report using the technology for sustainability more than less digitally mature organizations (42% and 39%, respectively). 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. Media and entertainment organizations are exploring solutions to this problem to offset the impact of data centers, including carbon removal technology or carbon offset programs.

## Advertising, publishing, and graphic design leads the way for AI-enabled sustainability efforts



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.

# The AI hype cycle meets reality

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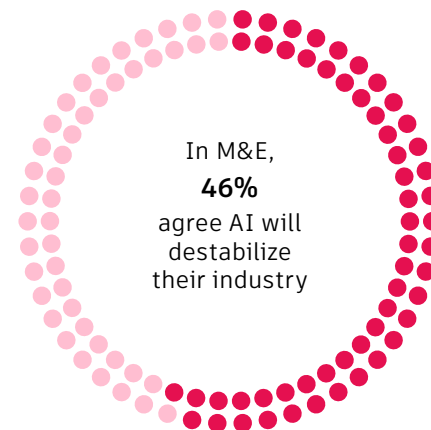
#### INSIGHT 4: M&E

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 76% of leaders in M&E saying that AI would enhance their industry.

But the reality of AI hasn't yet lived up to the hype, according to leaders in media and entertainment. Sentiment toward AI and other emerging technologies is down significantly year-over-year, with

just 71% of business leaders in M&E saying AI will enhance their industry—representing a 7% drop from 2024. Industry disruption from AI is also a major concern, with the majority 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.



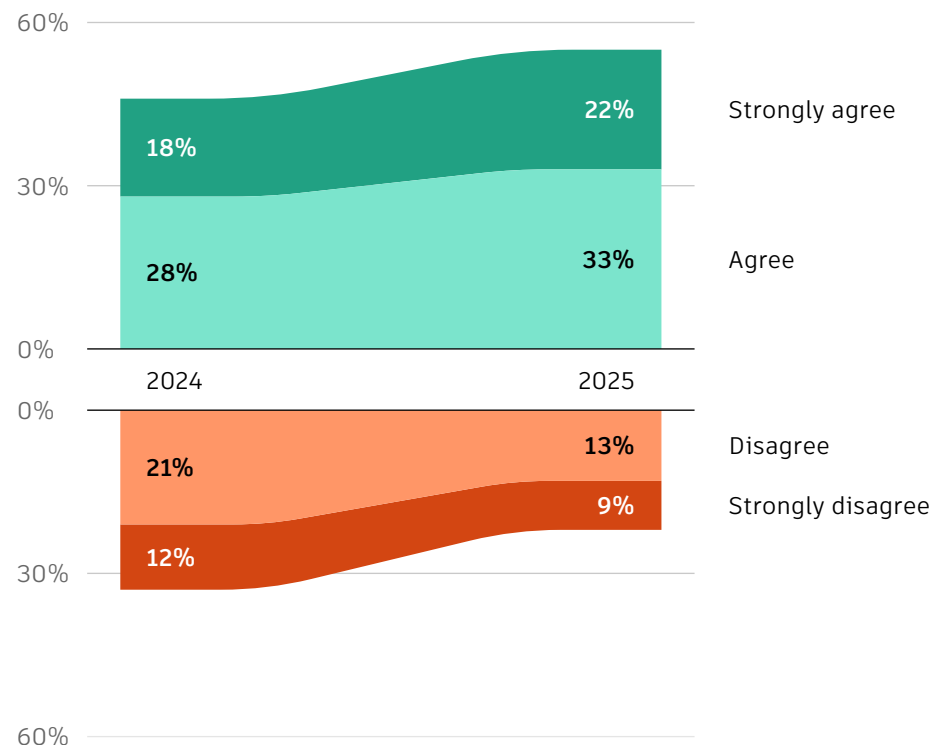
#### INSIGHT 4: M&E

More than half (55%) of leaders and experts in M&E agree AI will destabilize their industry, up from 46% in 2024 and representing a 20% 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 far more likely to say that AI will destabilize their industry (60%) compared to less digitally mature companies (48%). This makes sense when considering that digitally mature organizations will have more processes, systems, and workers impacted by AI implementation.

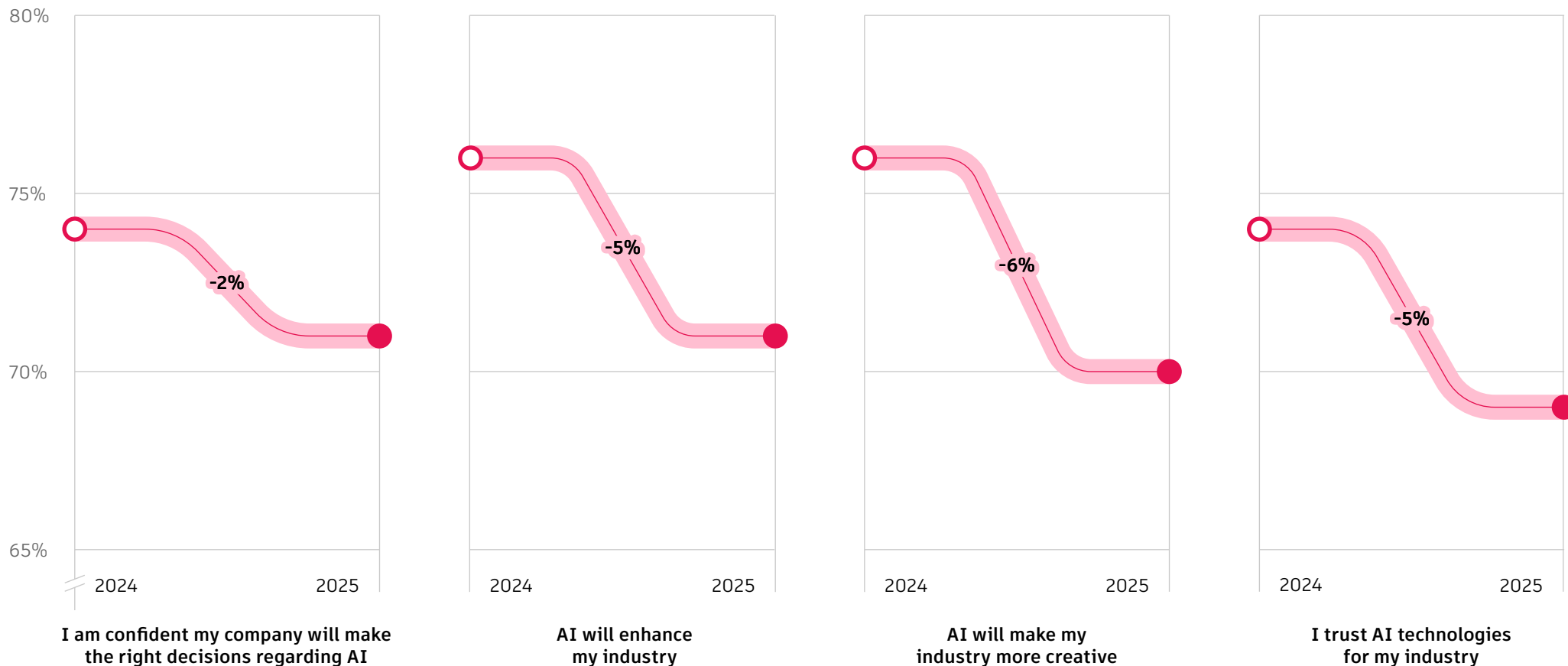
## Concern about AI-related industry disruption is up

More than half of business leaders agree AI will be destabilizing



M&E 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.

## AI sentiment is down across the board

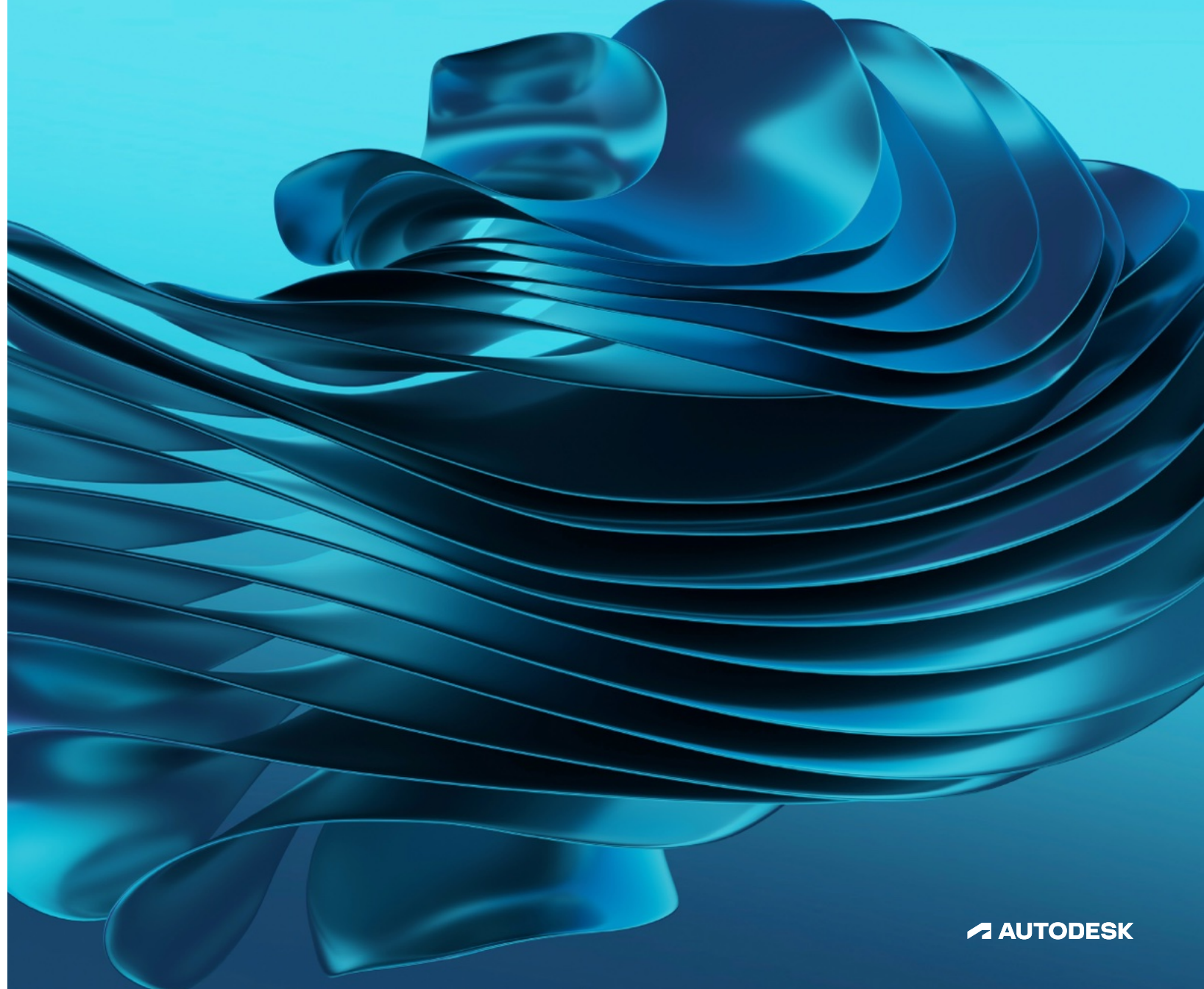


M&E respondents. Percentage of respondents who agree to statements: 1. AI will enhance my industry. 2. AI will make my industry more creative. 3. I am confident my company will make the right decisions regarding AI. 4. I trust AI technologies for my industry. Survey question: When you think about artificial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

#### INSIGHT 4: M&E

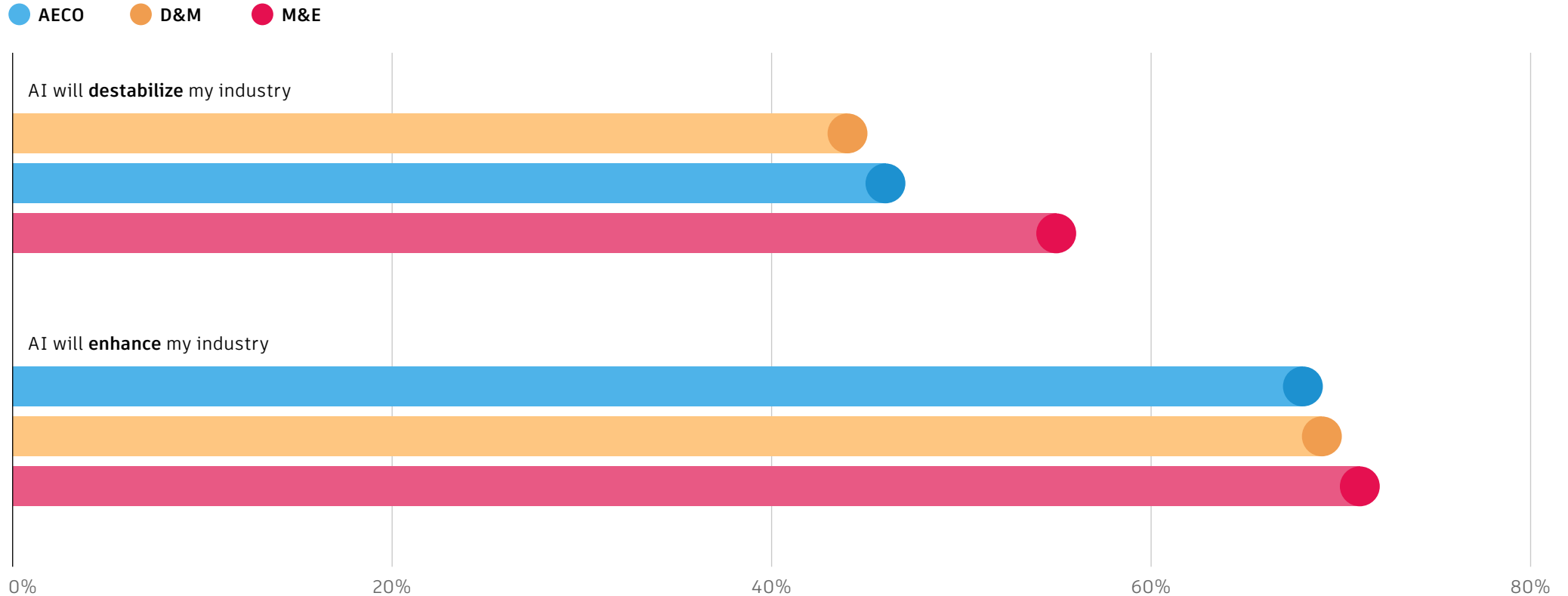
Concern about disruption is up and overall positivity about AI has dropped significantly from 2024. Trust in AI technology in M&E has decreased 5 percentage points year-over-year, representing a 7% change in sentiment.

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.



#### INSIGHT 4: M&E

## Media and entertainment is experiencing the most AI disruption and the most benefit



Percentage of respondents who agree to statements: 1. AI will destabilize my industry. 2. AI will enhance 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.



#### INSIGHT 4: M&E

Leaders in M&E are 25% more likely than leaders in D&M and 20% more likely than AECO leaders to say that AI will destabilize their industry.

In fact, the entertainment industry is already seeing the effects of AI disruption, including strikes from writers and actors protesting the use of AI and game developers seeking

unionization to ensure AI doesn't endanger job security. But amid this concern is an optimism for AI in the future of the industry—71% of M&E leaders think AI will enhance their industry, compared to 69% in product design and manufacturing and 68% in architecture, engineering, construction, and operations.

***“We use AI to ideate for discussions. But there are no big studios that are distributors who touch AI-generated images, because of the legal issues. Who owns the intellectual right to the material, and where did it plagiarize it from? As a company, at this point, we are consciously staying away from using it for more than ideating. We do not create any final images, pixels, or writing with those tools.”***

**VEERENDRA PATIL**

Founder and Creative Director, Zebu Animation Studios,  
an animation studio headquartered in India

***“z-emotion harnesses AI for two key areas: high-fidelity cloth simulation in real time for gaming and feature films and virtual try-on for the fashion industry, leveraging 3D digital fashion technology to generate infinite combinations of synthetic garment data sets.”***

**DONGSOO HAN**

CEO, z-emotion, a 3D fashion technology company headquartered in South Korea



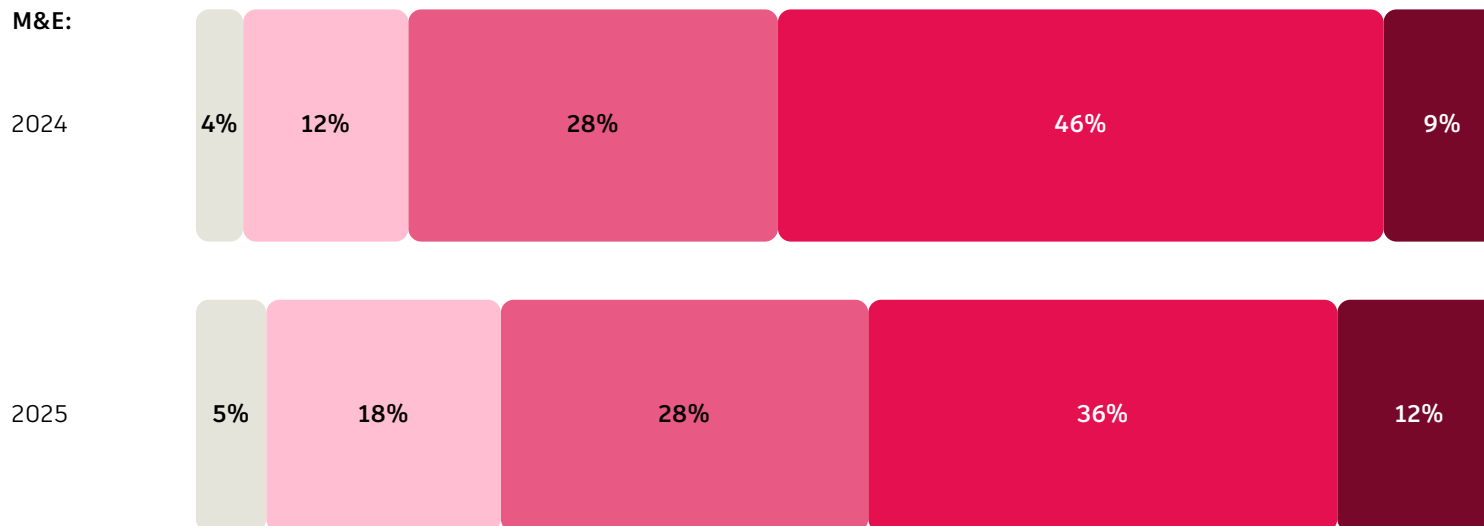
#### Solution spotlight

Since its launch in 2018, Untold Studios—the world's first fully cloud-based creative studio—has leveraged software for scalable collaboration in animation and visual effects across music, film, TV, and advertising. This approach has attracted top global talent, growing the team from 16 to more than 240 in five years and earning it multiple awards nominations, including BAFTA, Emmy, and Grammy. Untold Studios integrates emerging technologies such as universal scene description (USD) into its workflows, allowing the company to scale quickly and manipulate data more precisely.

→ **READ MORE**  
[about](#) Untold Studios

## AI journeys adjust to reflect implementation realities

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



Survey question: Where is your company or organization in incorporating artificial intelligence (AI) technology?  
5 point scale. Values do not add up to 100% due to rounding.



#### INSIGHT 4: M&E

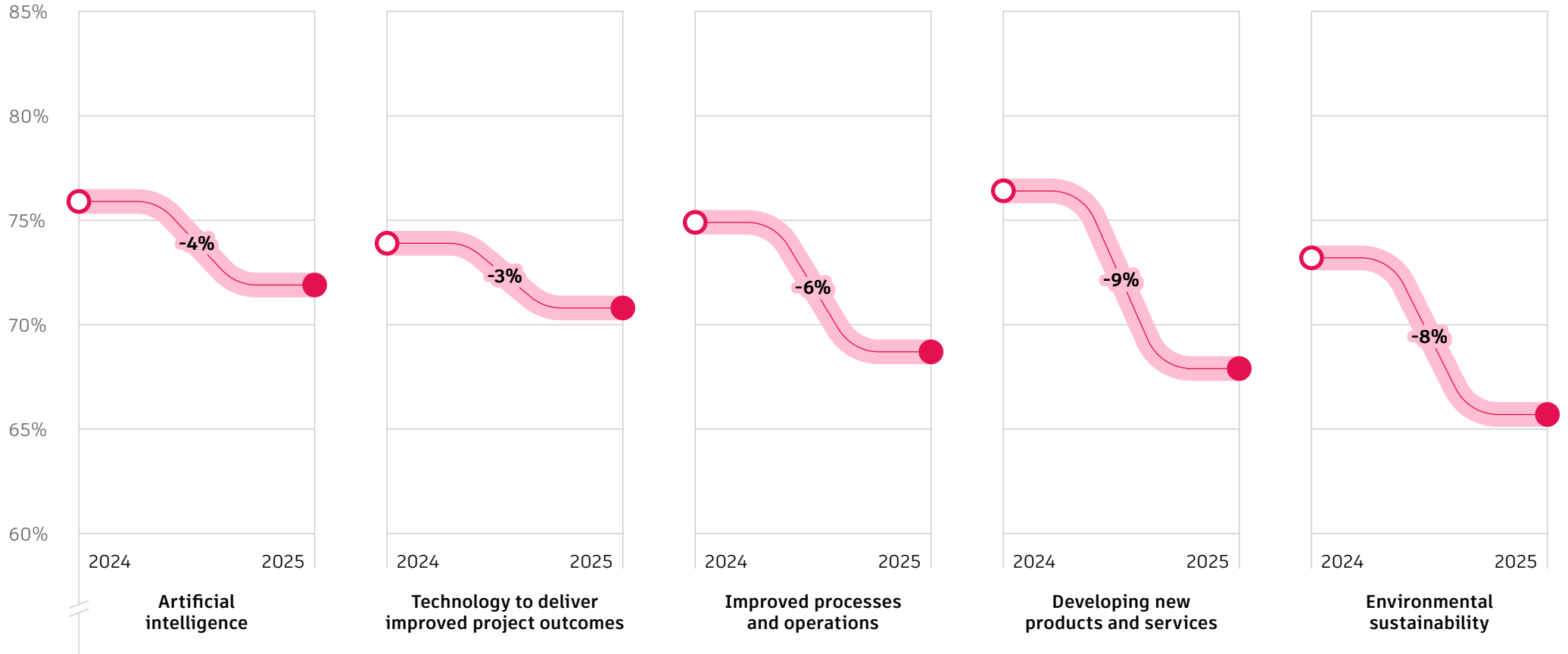
In 2024, leaders in M&E were confident about progress toward reaching their AI goals, with 55% saying they were approaching or had already achieved their goals. This year, as leaders are faced with the complexities of implementing AI solutions across their organizations, they are rethinking where they are on their AI roadmaps.

Only 48% of leaders in M&E say they are approaching or have achieved their AI goals, a 7-point decrease, that represents a 13%

decline year-over-year. Leaders are more conservative this year when estimating their progress, with a 12% year-over-year increase in leaders who say they are in the early or middle stages of their AI journey. This finding suggests that leaders are struggling to progress in their AI journeys 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. In M&E, 78% of leaders at digitally mature organizations say they will increase investment in AI, compared to 63% at less digitally mature companies. These increased investments could lead to outsized benefits for more digitally mature organizations who are already seeing benefits in hiring, productivity, and innovation from digital transformation efforts.

## Investments dip overall but remain high in AI



M&E 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.



#### INSIGHT 4: M&E

Despite implementation challenges and a dip in sentiment, leaders in M&E are still optimistic about AI's potential. When asked how their organization's investments will shift over the next few years, 72% of respondents say their investments in AI will increase.

# Cost, tech, and talent are top concerns

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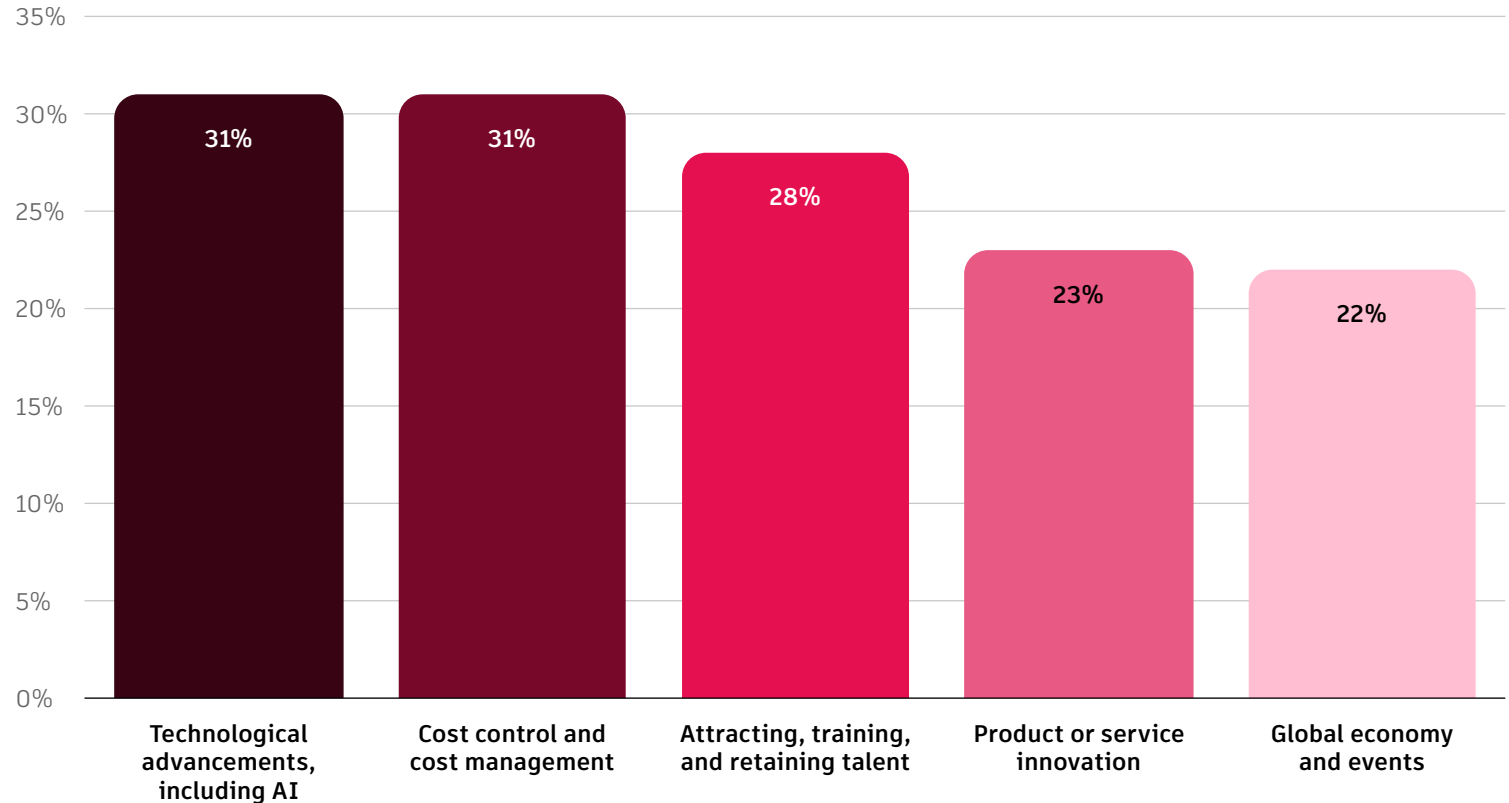
## INSIGHT 5: M&E

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 media and entertainment, with 31% 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



M&E respondents. Survey question: What are the top three challenges your company or organization faces today? Select up to three. 12 response options.





#### INSIGHT 5: M&E

Tied for top challenge this year at 31%, is technological advances (including AI) as 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.

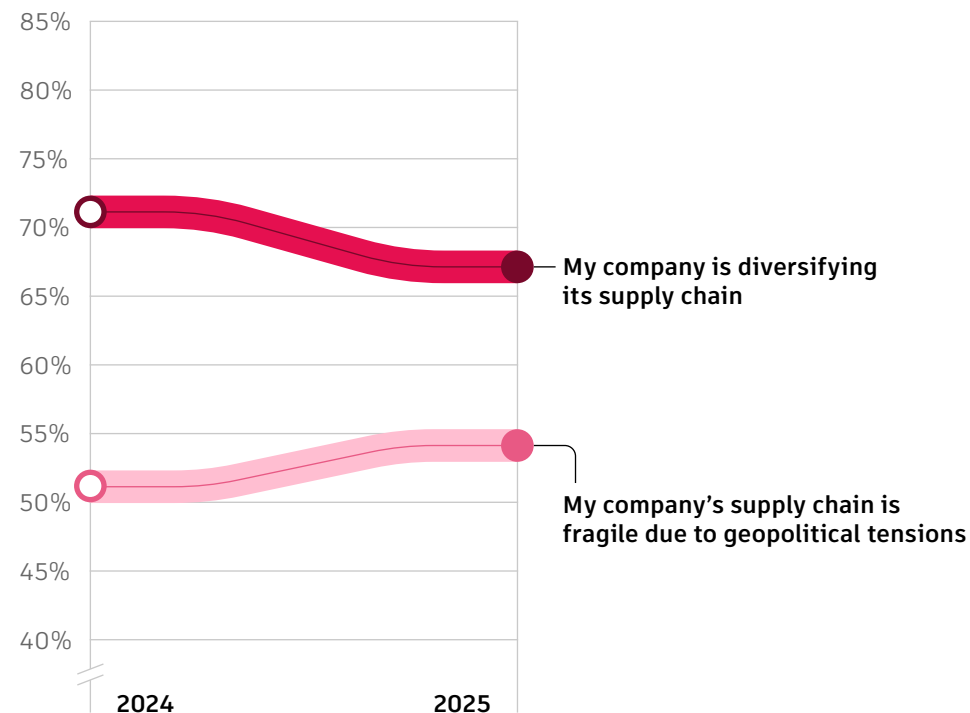
Ironically, cutting investment in technology can have a negative impact on budgets, since new tools and processes can often lead to greater efficiencies across the organization. For instance, leaders at data-effective organizations see cost as less of a challenge—just 25% identify it as a top concern compared to 32% at other organizations. Talent remains a perennial struggle,

identified by 28% of M&E 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.

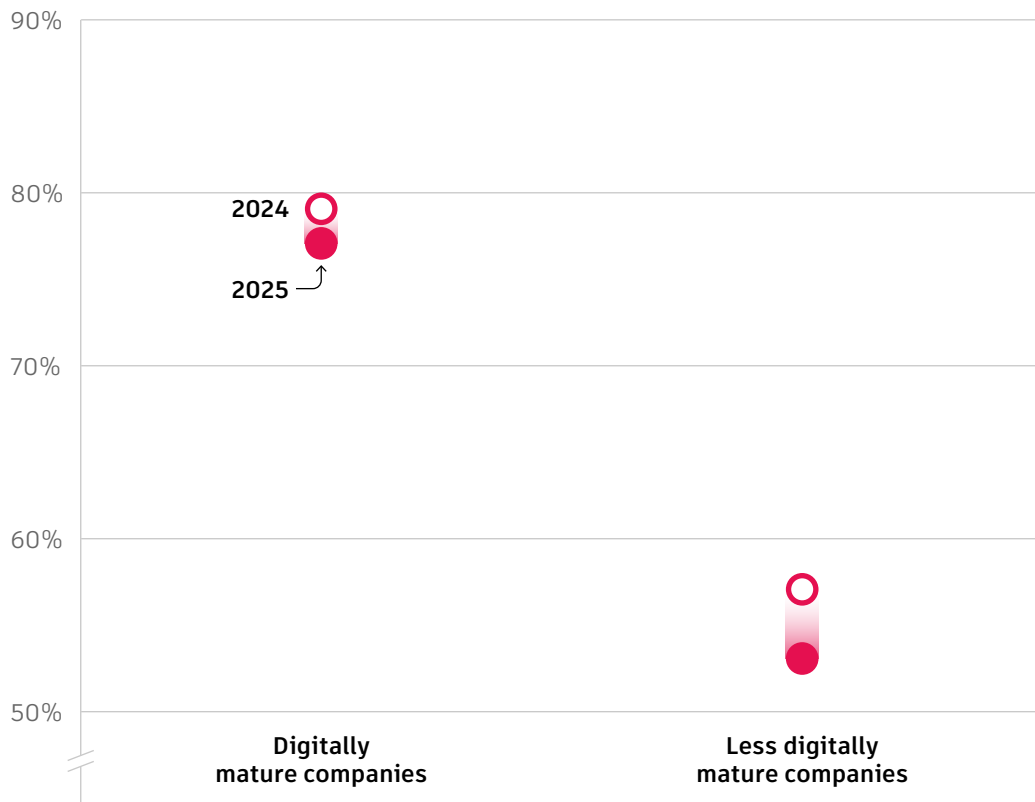
## Supply chains remain fragile and undiversified

Supply-chain diversification is down despite increased global uncertainty



M&E 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.

## Digitally mature companies 45% more likely to diversify their supply chains



M&E 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 in M&E worldwide, with 54% of business leaders saying their supply chain is fragile due to geopolitical tensions, up from 51% last year.

Despite this increased fragility, there is a global decline in the percentage of leaders who say their organizations are diversifying their supply chains. This year saw a 4-point drop (to 67%) 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 M&E organizations were 45% more likely to diversify their supply chains—giving them a significant edge when it comes to resilience.

# Leaders are cautious in the near term

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#### INSIGHT 6: M&E

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

Sixty-nine percent of M&E leaders surveyed for this year's report agree that the global landscape is now more uncertain, a 9-point jump that represents a 15% increase year over year. Leaders are also less confident in their organization's ability to weather unforeseen obstacles with just 64% saying they are well prepared, down from 70% in 2024.

This conflation of uncertainty and unpreparedness is having far-reaching impact across M&E. 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 more uncertain

**+9 points**  
from 2024

Leaders feel less prepared to handle unforeseen future changes

**-6 points**  
from 2024



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

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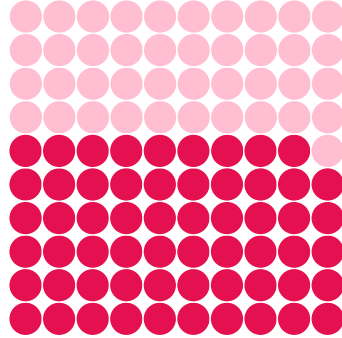


## INSIGHT 7: M&E

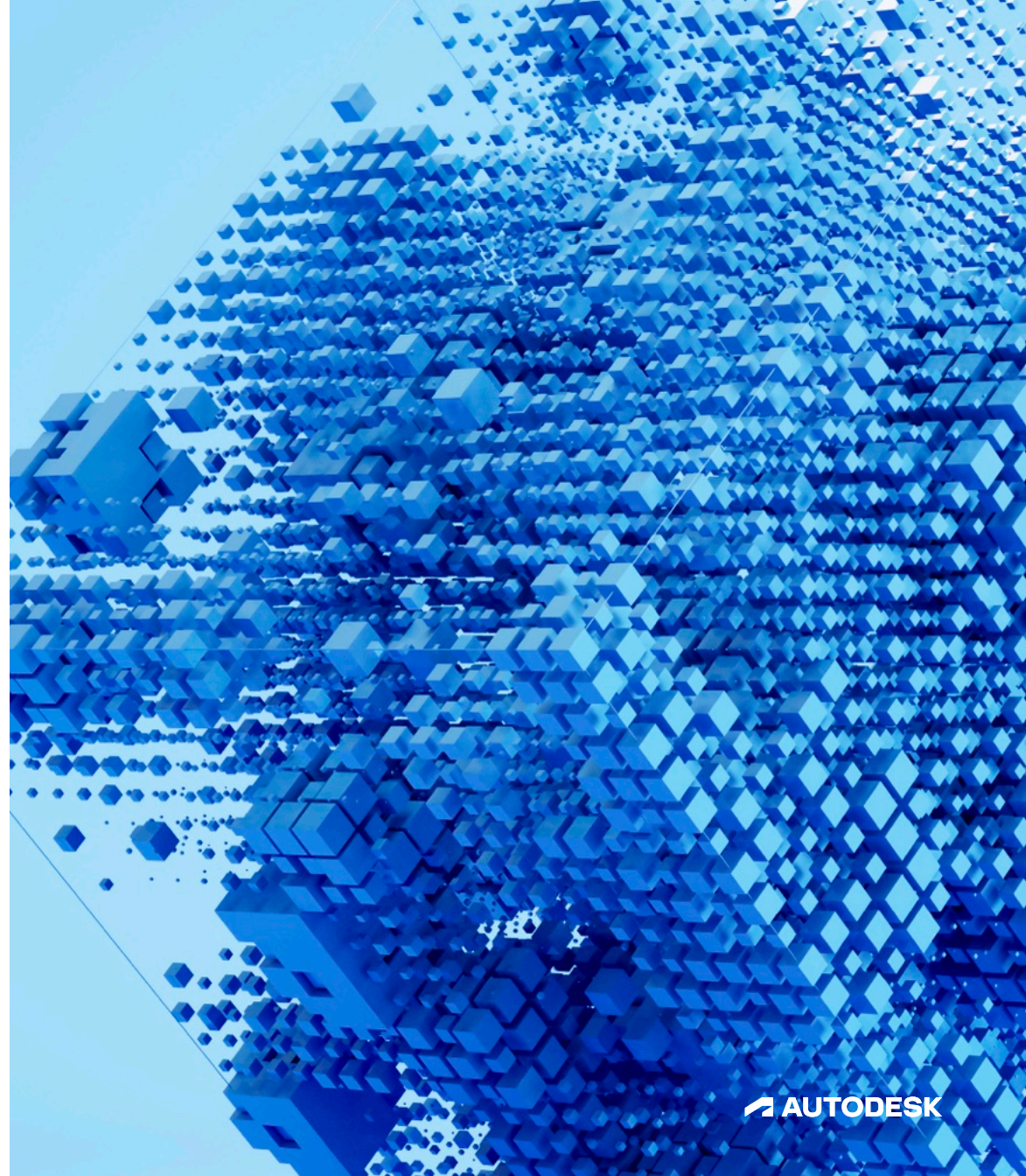
Media and entertainment organizations have struggled in recent years to find skilled talent, and this year that struggle has become acute enough to hinder growth. Fifty-six percent of business leaders in M&E say that lack of access to skilled talent is a barrier to their company's growth, up from 42% from last year.

When it comes to bridging and filling the skills gap, digitally mature companies are at a distinct advantage. In M&E, 79% of digitally mature companies will invest more in digital training, compared to 62% of less digitally mature companies. They are also more likely to implement continuous learning programs than less digitally mature companies, at 75% and 55% respectively. Digitally mature companies also see a boost when it comes to talent. Twenty-five percent of digitally mature companies report improved talent acquisition and retention as a benefit of digital transformation compared to only 20% of less digitally mature companies.

**59% in M&E say  
they have difficulty finding  
employees with the right skills**

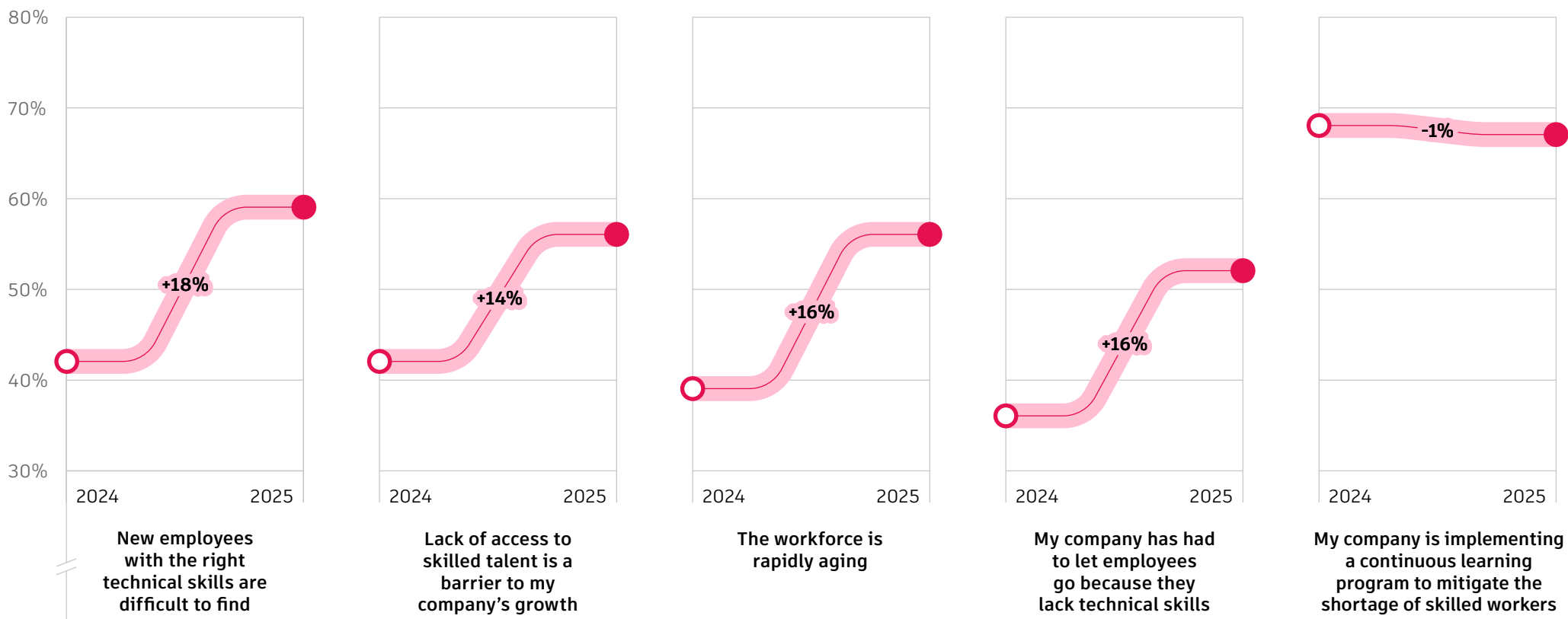


In M&E, 59% of business leaders worldwide agree that new employees with the right technical skills are difficult to find, up from 42% the previous year. Moreover, the number of leaders who say they have had to let people go because they lack technical skills has jumped to 52%, up from 36%, compounding labor shortage problems.



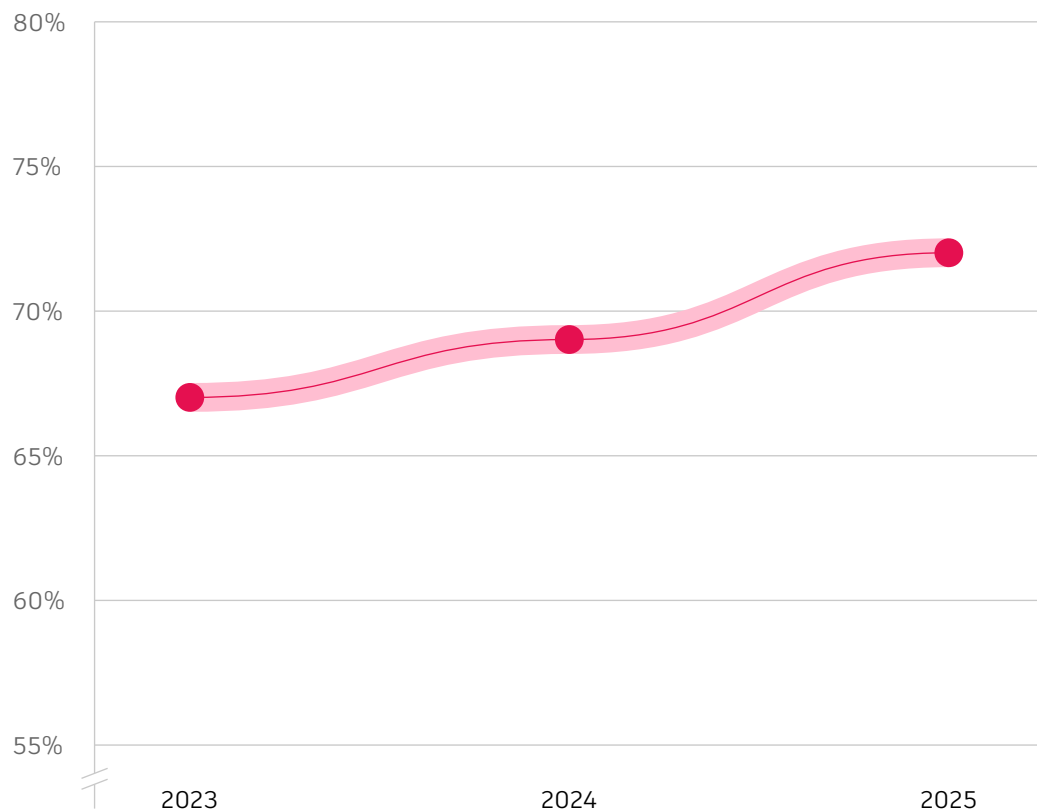
## Nearly two-thirds of organizations are confronting a skills gap

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



M&E 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.

## Despite the skills gap, investment in training is down



M&E 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.

One way to bridge the skills gap is to invest more in workforce training through continuous learning programs, but implementation of continuous learning programs remained stagnant at 67%.

Budget aside, training holds other challenges. The majority (54%) of M&E leaders say they do not have the resources to design internal training programs, up 13 points over last year, indicating that the tight

labor market is impacting initiatives across organizations.

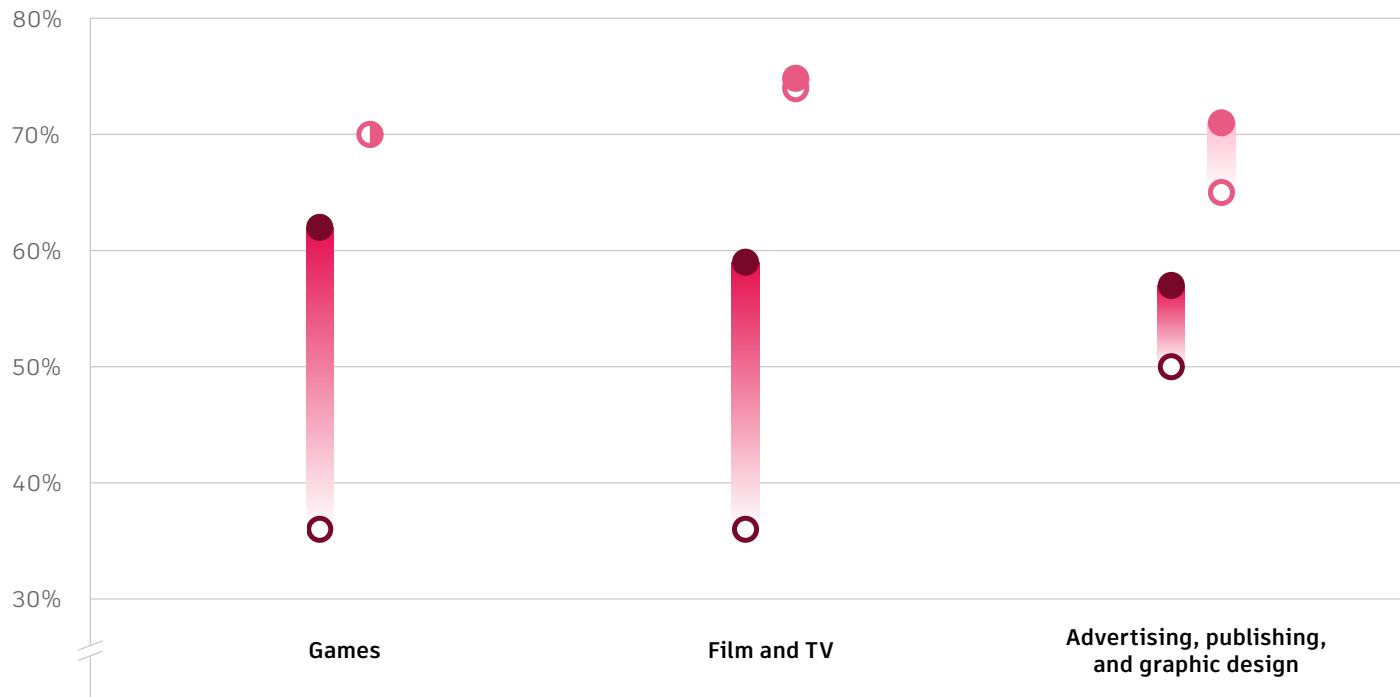
Confronted by multiple implementation obstacles, some organizations are turning to third parties to train their employees. While external training programs seem like an ideal solution for those organizations tight on resources, their efficacy remains in doubt, with 57% of leaders saying these do not meet the needs of their organization.



## Games sector sees biggest challenge with finding skilled talent

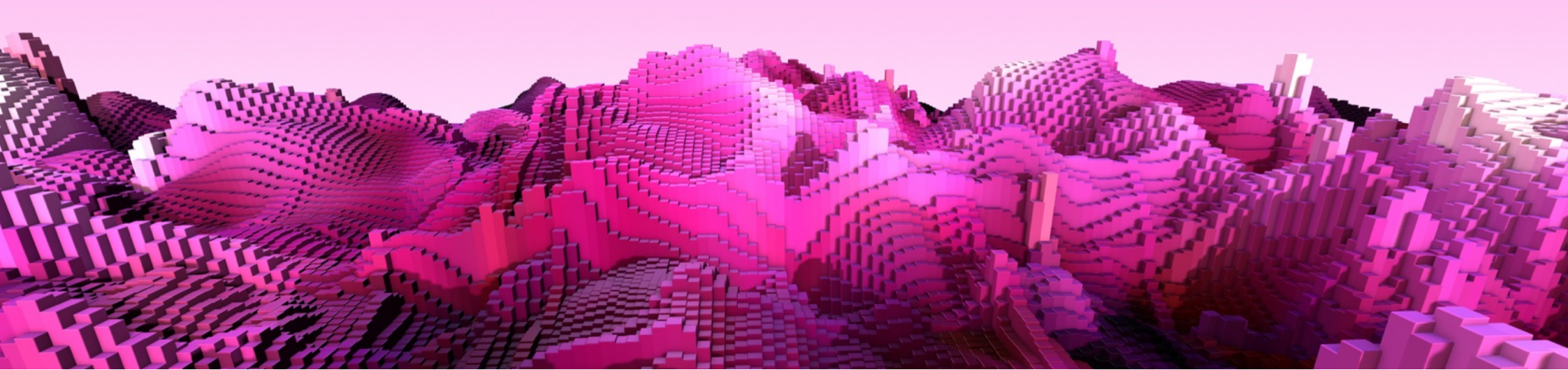
**M&E:** ● New employees with the right technical skills are difficult to find ● In the next 3 years, my company is planning to invest more in digital skills training

○ 2024 ● 2024 and 2025 ● 2025



Percentage of respondents who agree to statements: 1. New employees with the right technical skills are difficult to find. 2. In the next 3 years, my company is planning to invest more in digital skills training. 5-point scale. Top two = agree.





#### INSIGHT 7: M&E

Media and entertainment leaders are no stranger to the talent crunch, with 59% saying they struggle to find the right technical skills.

Driven by recent significant layoffs across the sector, games is seeing the largest talent shortage, with 62% of leaders agreeing that it's difficult to find skilled talent, up from 36% last year, but film and TV (59%) and advertising (57%) are also feeling the talent crunch.

To address this gap, leaders in M&E plan to increase its investment in digital skills training, contrary to the drop in digital investments seen across AECO and D&M. This makes sense when considering the outsize and disruptive impact AI and emerging technologies have had on the industry, from intellectual property concerns to massive writer and actor strikes. It suggests the industry is looking to minimize future disruption and keep pace with rapidly advancing technology in the sector.

***“We created a program called Learn OK Please because tools are changing. Our 2D animation artists are learning how to use 3D software, and our 3D artists are learning how to use illustration. We do a lot of cross-training. The era of superspecialization is over. You need to have multiskilled artists and dependency departments. If you’re doing texturing, you should be able to understand lighting, surfacing, and basic compositing.”***

**VEERENDRA PATIL**

Founder and Creative Director, Zebu Animation Studios,  
an animation studio headquartered in India



# Investments remain strong but reflect uncertainty

06  
07  
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#### INSIGHT 8: M&E

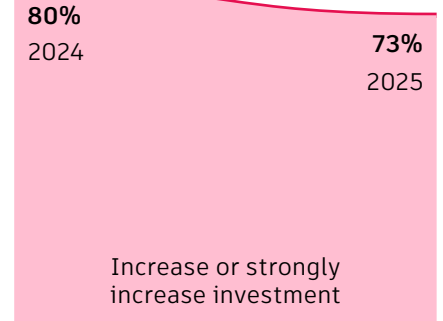
Future investment projections have fallen this year but are still robust—73% of business leaders in M&E say their organizations will increase or strongly increase their investments over the next three years. While this reflects confidence in the future, this number is down from 80% last year, indicating 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 83% of

leaders planning to increase future investments, compared to 59% at less digitally mature companies.

Further, future investments are higher at data-effective companies where 89% of leaders say they will increase future investments. This indicates that organizations are seeing outsized benefits from their investments and that digital transformation efforts may have eased implementation challenges, resulting in long-term cost savings and productivity gains.

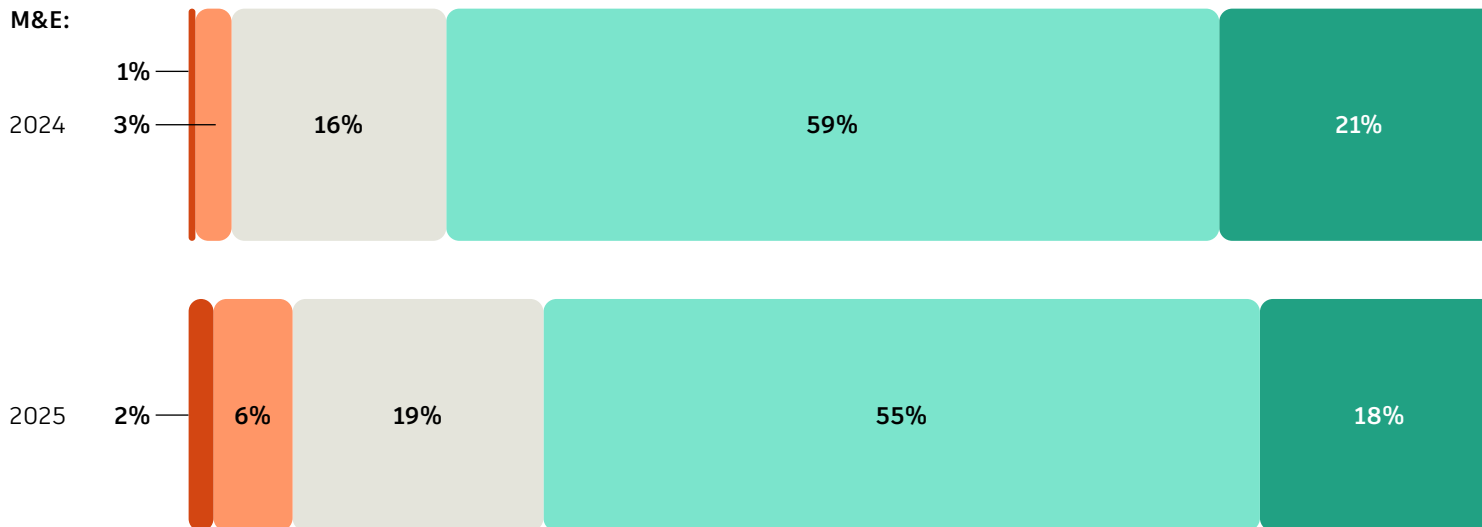
#### M&E businesses scale back investment plans



## Future investments still robust

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

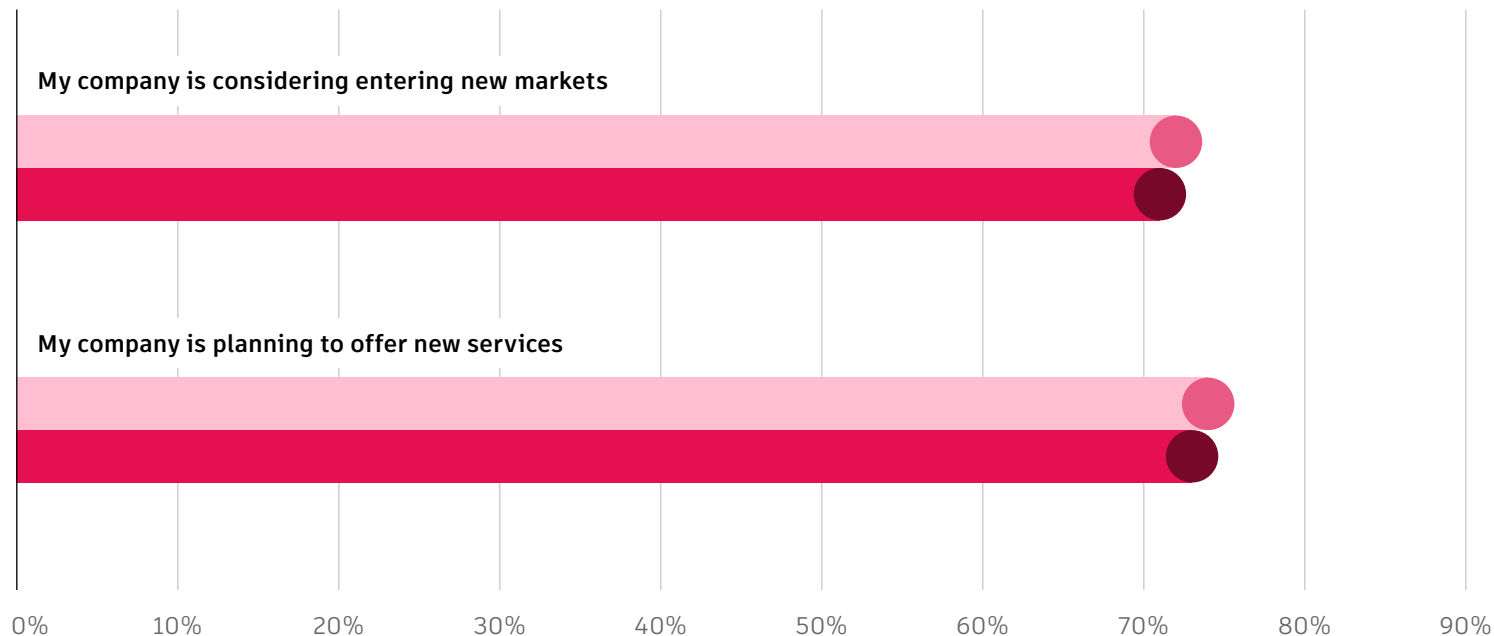
● Strongly decrease   ● Decrease   ● Stay roughly the same   ● Increase   ● Strongly increase



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

## Companies are pulling back on expansion efforts

M&E: ● 2024 ● 2025



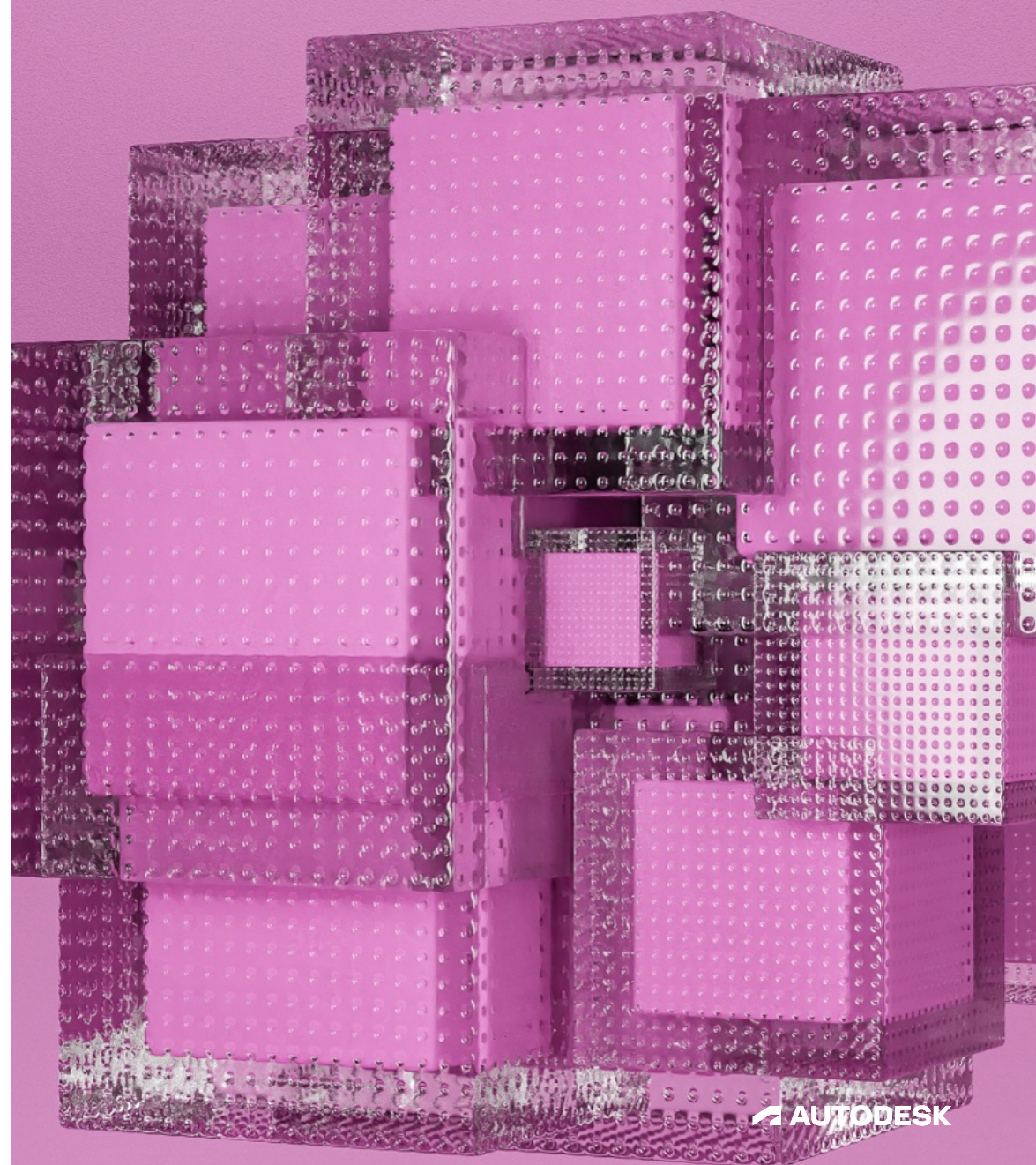
Percentage of respondents who agree to statements: 1. My company is considering entering new markets. 2. My company is planning to offer new services.  
Survey question: To what extent do you agree or disagree that your company or organization is doing the following to be more resilient? 5-point scale.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

## INSIGHT 8: M&E

Most M&E leaders 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 those investments remain flat year-over-year—71% say they will enter new markets this year compared to 72% last year. Enthusiasm for offering new services is also stagnant, with 73% of leaders this year saying they will offer new services compared to 74% last year.

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 of media and entertainment, digitally mature organizations are much less likely to be affected by this general belt-tightening. In M&E, 78% of digitally mature companies say they are considering entering new markets, compared with 61% of less digitally mature companies. They are also more likely (79%) to offer new products and services than their counterparts (65%), and to increase their investments into acquisitions (69% compared to 49%). These actions give digitally mature organizations a competitive advantage, allowing them to expand while others contract under market pressures.







# Conclusion

Regardless of recent headwinds, leaders in media and entertainment 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.



# 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.

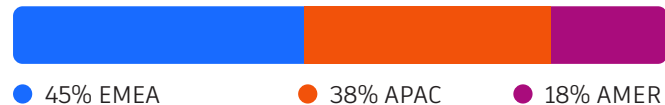
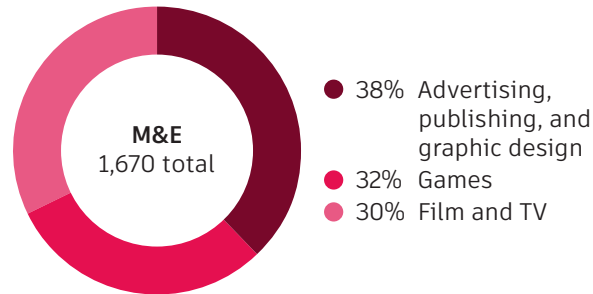
The quantitative data in this M&E subsample (n= 1,670) was collected between May and August 2024 through a 20-minute online survey.<sup>3</sup> Autodesk partnered with Qualtrics for the collection of this data. In addition, 34 qualitative interviews with business leaders and futurists were conducted in October and November 2024.

## M&E survey sample:

**2025:**  
1,670 M&E respondents

**2024:**  
1,579 M&E respondents

**2023:**  
721 M&E respondents



## 73%

of survey participants are decision-makers in their companies

## 10 years

is the average time of experience in their industry

## 31%

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

<sup>3</sup> [2025 State of Design & Make questionnaire](#)

# 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 23% 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 M&E respondents, 57% 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:* Seventy-three percent of survey participants in M&E 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 27% of M&E 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.

# About Autodesk

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Contact Autodesk at [state.of.design.and.make@autodesk.com](mailto: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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