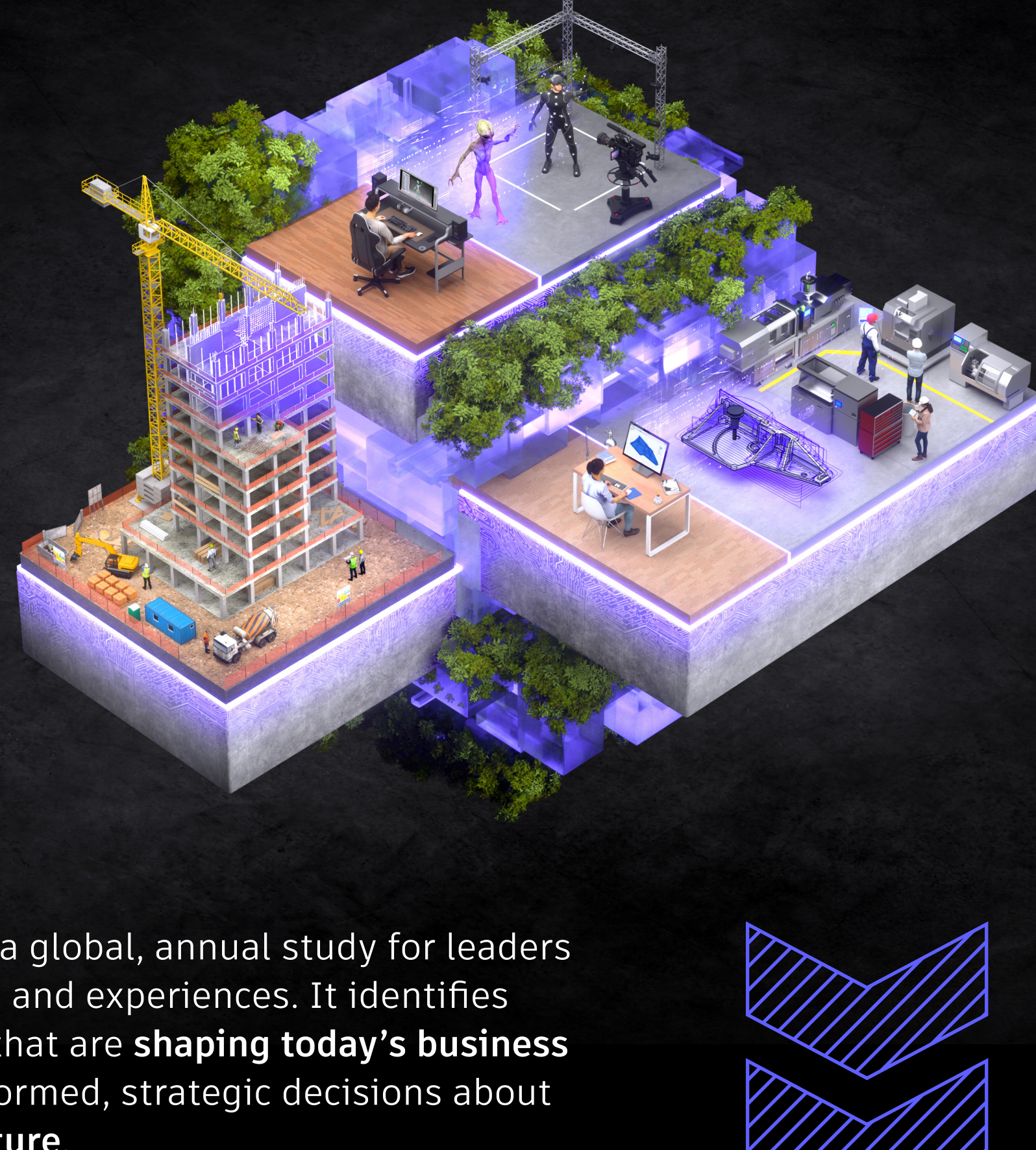


2023 STATE OF DESIGN & MAKE

Executive Summary

Insights from industry leaders on how digital transformation is driving business resilience, sustainability, and talent management.



The *State of Design & Make* report is a global, annual study for leaders who design and make places, objects, and experiences. It identifies the most pressing **drivers of change** that are **shaping today's business decisions** and helps leaders make informed, strategic decisions about how to **prioritize and invest in the future**.

Autodesk partnered with Ipsos, a leader in global research and insights, to **survey and interview 2,565 leaders, futurists, and experts** who shared their approaches and points of view on the obstacles they are facing and opportunities they are identifying.

Respondents data

APAC

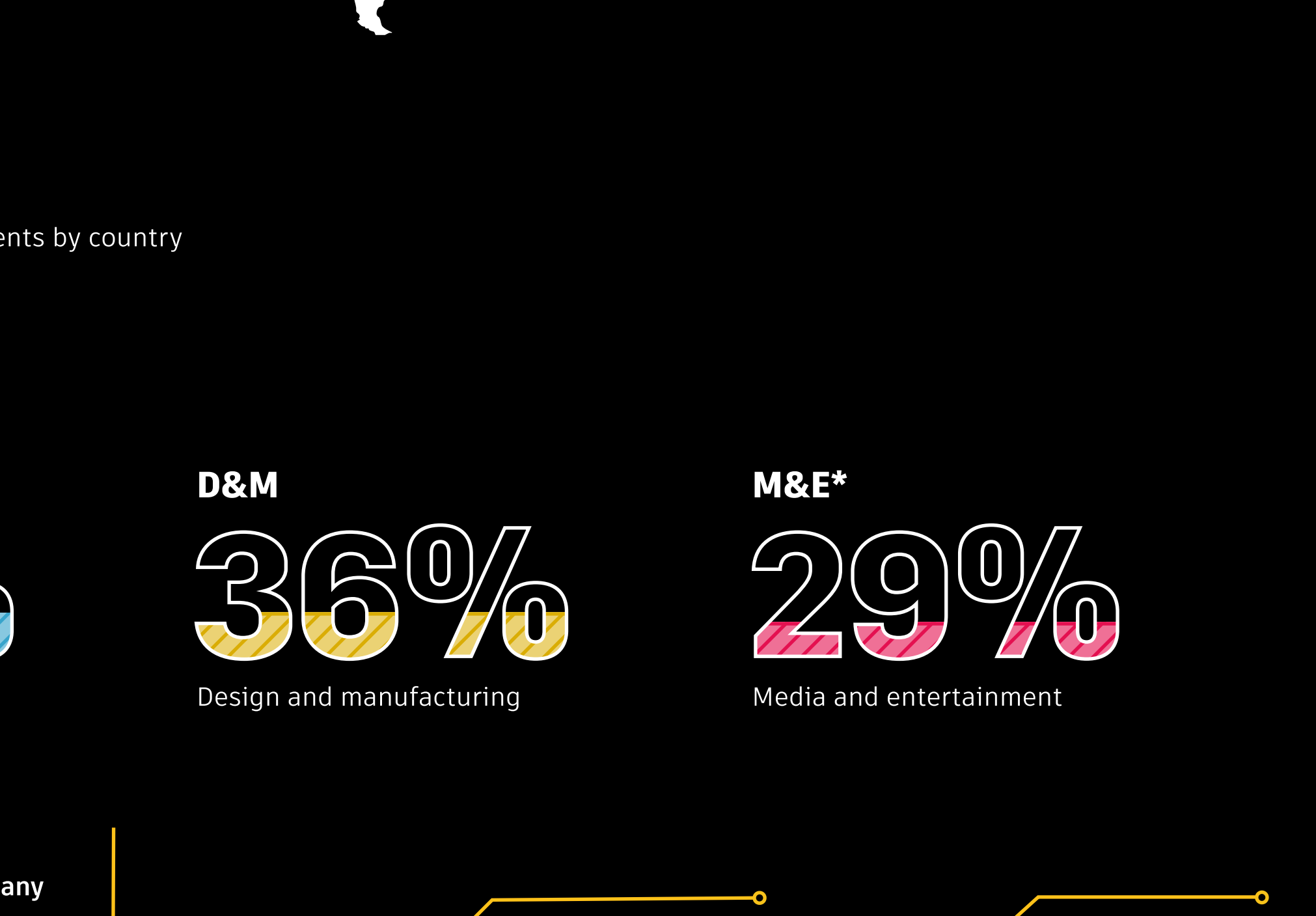
- Australia 262
- China 215
- India 197
- Japan 220
- South Korea 110

Europe

- France 202
- Germany 254
- Italy 109
- Netherlands 101
- Sweden 104
- United Kingdom 257

AMER

- Canada 107
- United States 351



Quantitative survey respondents by country

AEC

36%

Architecture, engineering and construction

D&M

36%

Design and manufacturing

M&E*

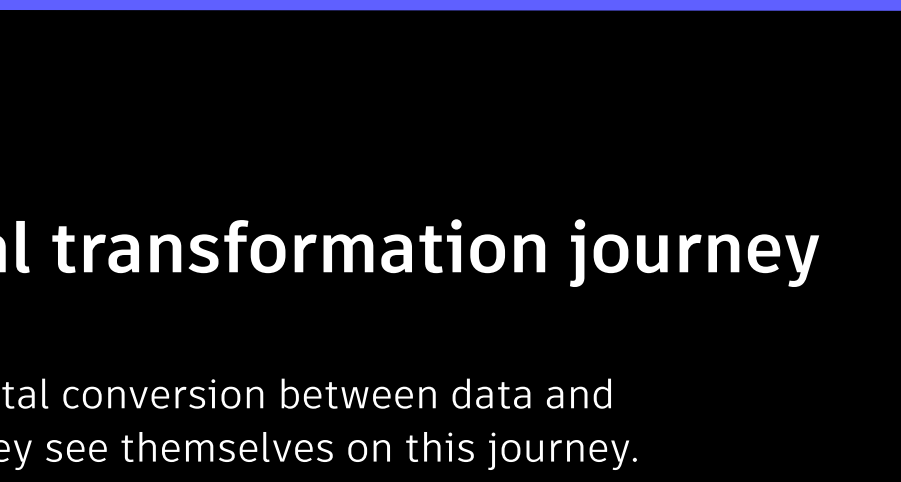
29%

Media and entertainment

27% Small company size, 1-19 employees

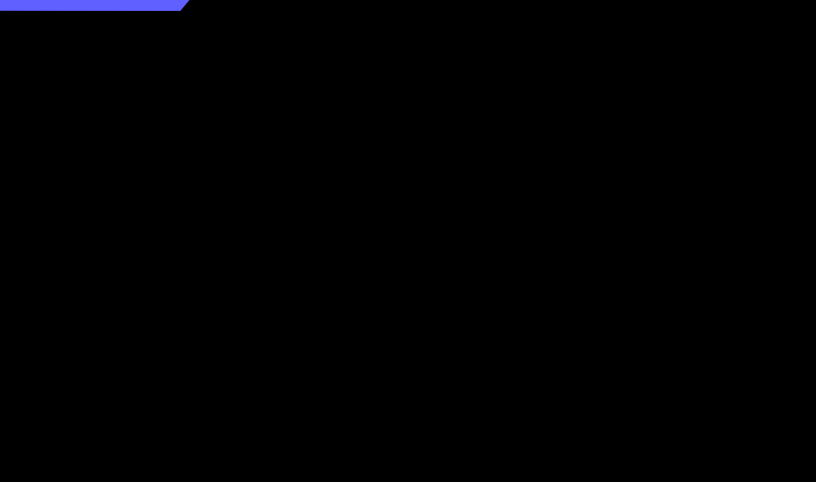
42% Medium company size, 20-4,999 employees

31% Large company size, 5,000+ employees



Experts 31%

Leaders 69%



Autodesk users 59%

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

Companies on their digital transformation journey

Digital transformation is defined as "the digital conversion between data and processes". Companies were asked where they see themselves on this journey.

Less digitally mature

Companies in the early/middle stages of the journey are defined as "less digitally mature"

17% Early stages

47% Right in the middle

More digitally mature

Companies approaching/that have already achieved their transformation are defined as "more digitally mature"

25% Approaching the goal

11% Achieved the goal

More digitally mature companies plan to increase investments in the next three years at higher rates

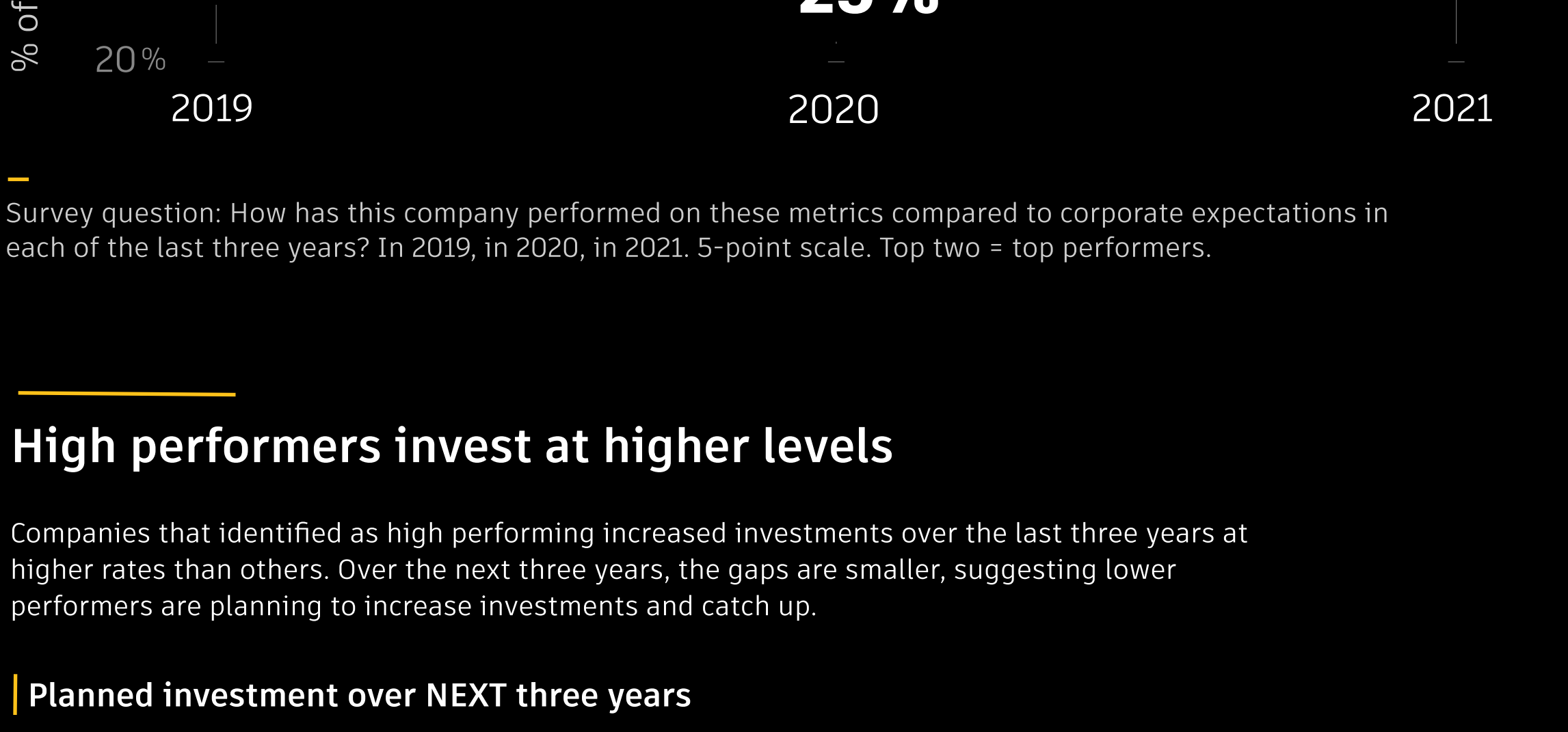
The digital maturity difference

Companies that are more digitally mature outperformed those that are less digitally mature in each of the last three years.

The performance gap between more digitally mature and less digitally mature companies appears to be growing.

Less digitally mature companies

More digitally mature companies



Survey question: How has this company performed on these metrics compared to corporate expectations in each of the last three years? In 2019, in 2020, in 2021. 5-point scale. Top two = top performers.

High performers invest at higher levels

Companies that identified as high performing increased investments over the last three years at higher rates than others. Over the next three years, the gaps are smaller, suggesting lower performers are planning to increase investments and catch up.

Planned investment over NEXT three years

Poor performers 66%

Top performers 75%

Respondents who plan to increase investments

Planned investments are similar across industries

Organizations are planning to invest more over the next three years to overcome the challenges identified below.

Overall

AEC

D&M

M&E

74% Plan to increase investments

Technology to deliver project outcomes

73% Plan to increase investments

Product and service innovation

73% Plan to increase investments

Developing new products and/or services

71%

Improved processes and operations

70%

Data management and analytics

66%

Improved collaboration

62%

Talent acquisition and employee retention

58%

Sustainability (relating to the environment)

52%

Remote work

Businesses face challenges with talent, costs, and global uncertainty

Leaders and experts in the Americas are most likely to cite talent and cost management as their top challenges. After talent, the most cited challenge for European respondents was the global economy.

Overall

APAC

EMEA

AMER

48% Attracting/retaining talent

40% Cost management

35% Global economy

31%

Data automation/technological advancement/digitization

30%

Product/service innovation

26%

Business resiliency/improving the supply chain

28%

Product/services diversification/new business lines

20%

Sustainability (relating to the environment)

21%

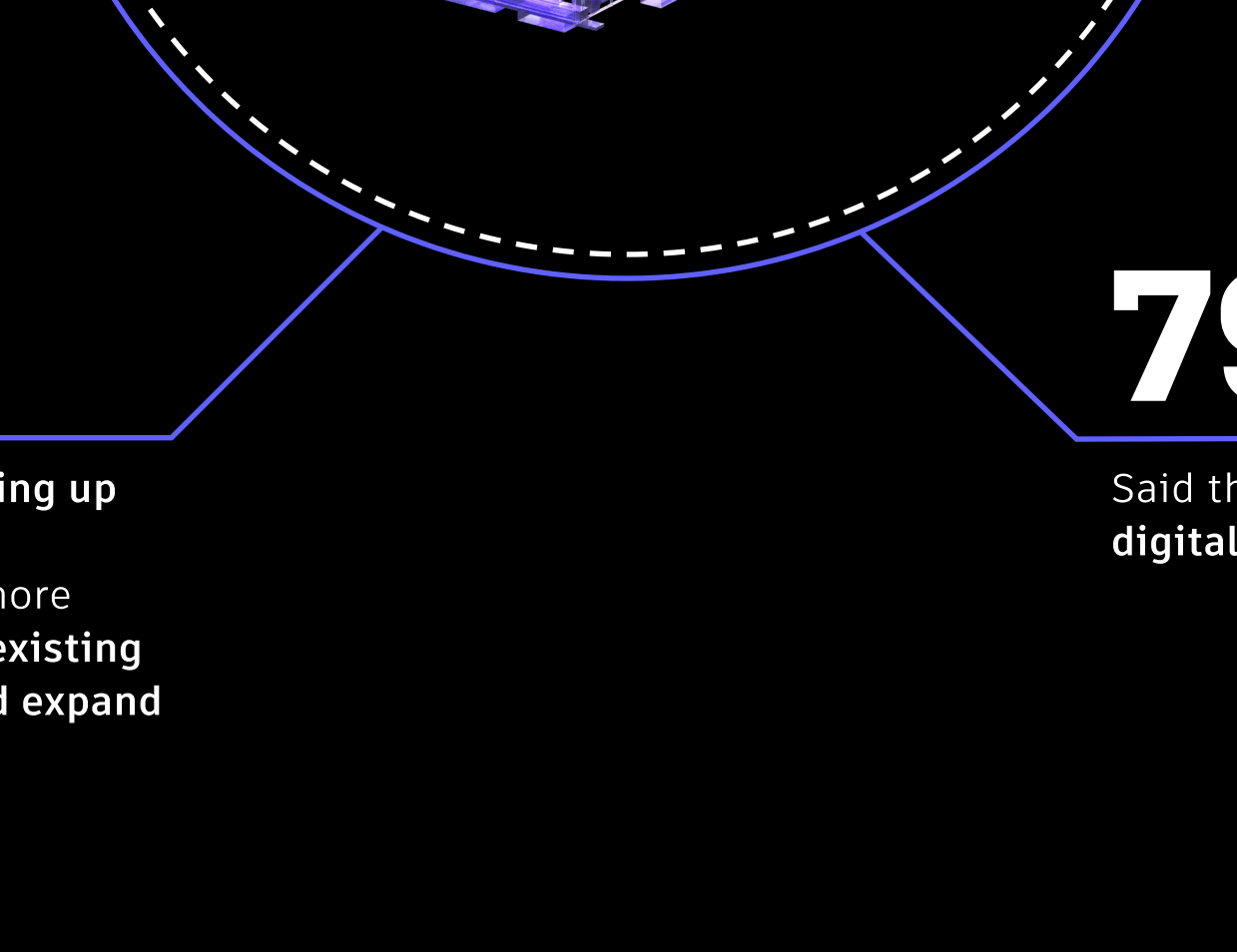
The regulations from government and regulatory bodies

Leaders and experts in industries that design and make the world are finding **powerful ways to adapt to an accelerating rate of change**. The future of the design and make industries relies on the understanding and successful implementation of thoughtful moves where digitization, sustainability, and workforce meet.

Business resilience emerges amid uncertainty

79% Of business leaders and experts say the future global landscape feels more uncertain than it did three years ago

59% Of respondents said their companies are prepared to face this uncertainty. This rate was higher at more digitally mature companies, where 72% of respondents said their firm was prepared to face uncertainty



35% Of companies feel they are keeping up with the pace of change in their industry. These companies are more likely to have plans to increase existing services, offer new services, and expand into new markets

79% Said that future growth will depend on digital tools.

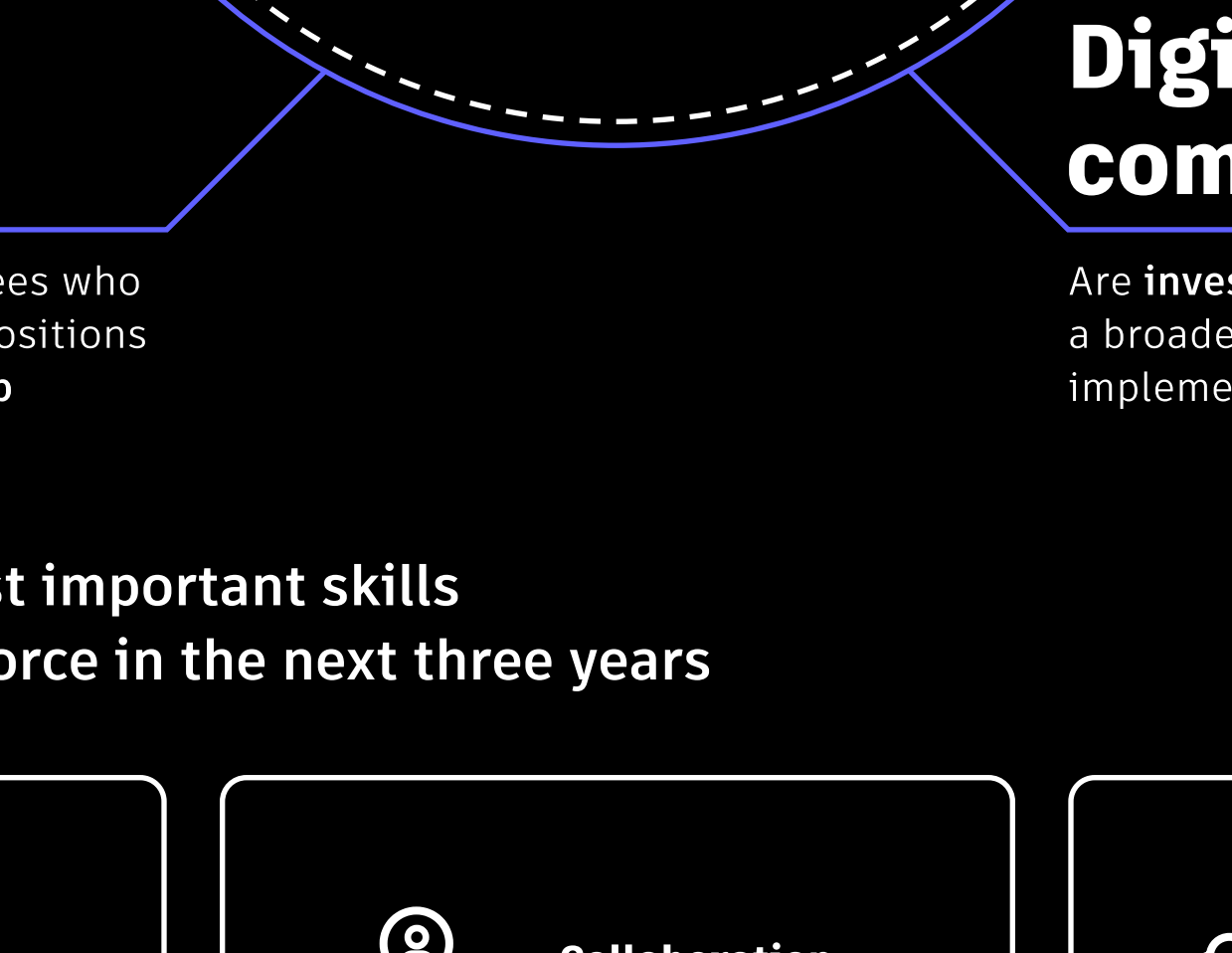
Top benefits of digital transformation include:

- Reduced costs
- Increased innovation and better ideas
- The ability to launch products and services faster

The competition for talent heats up

67% Of companies say they have trouble finding skilled employees

72% Of respondents said that the workforce has evolved more in the past three years than it did in the previous 25



56% Of companies are hiring employees who lack the skills needed for their positions and plan to train them on the job

Digitally mature companies Are investing in technology, hiring from a broader geographical area, and implementing new training programs

Skills of the future: most important skills identified for the workforce in the next three years

- Technology skills
- Collaboration skills
- Regulatory knowledge
- Innovation skills
- Motivation for ongoing learning

Sustainability drives business value

89% Of respondents said that their industry/organization has made changes to improve sustainability

83% Say it's important for their companies to achieve sustainability goals

17% Only 17% strongly agree that they are proud of their company's sustainability initiatives



80% Of respondents said that improving sustainability practices is a good long-term business decision. 55% said it is a good short-term decision

82% Say that customers are influencing their sustainability activities. 72% identified employee pressure as a significant influence

Click here to access the full *State of Design & Make* report—including all glossary terms and research insights

Access full report

* Values do not add up to 100% due to rounding. Sources: Autodesk, 2023 State of Design & Make report—including all glossary terms and research insights