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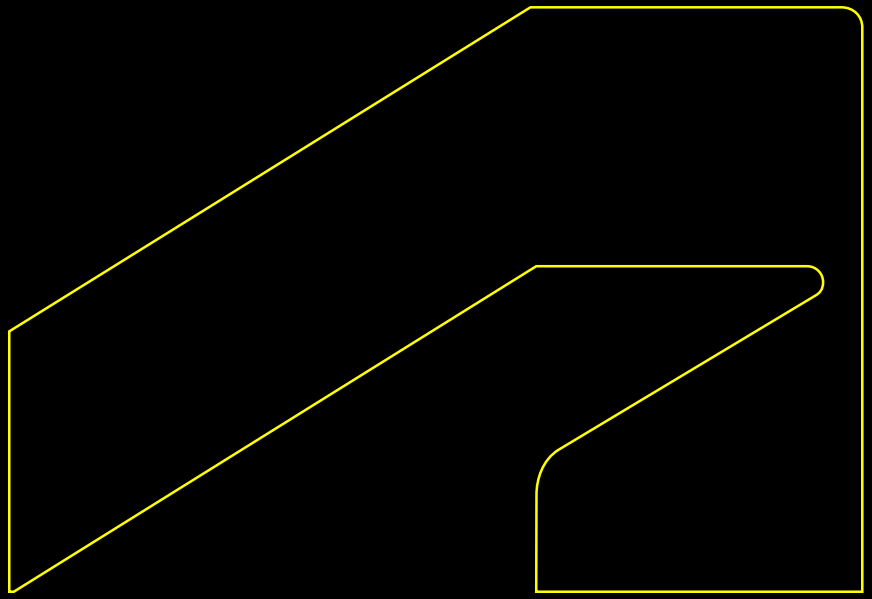
State of Design & Make

APAC REGION REPORT



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About the APAC 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 APAC region* report, Autodesk surveyed and interviewed 2,152 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 Asia-Pacific (APAC) region including Australia, China, India, Japan, Singapore, South Korea. 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

Introduction

Leaders in the APAC 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 APAC

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 29% of APAC 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 APAC 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 APAC are still feeling bullish in some areas as they identify opportunity amid disruption

- Although overall investments are down year-over-year, 68% of leaders say they will increase overall future investments
- Sustainability is experiencing a surge of optimism, with 94% 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 APAC, with applications from natural-disaster mitigation to project lifecycle management.

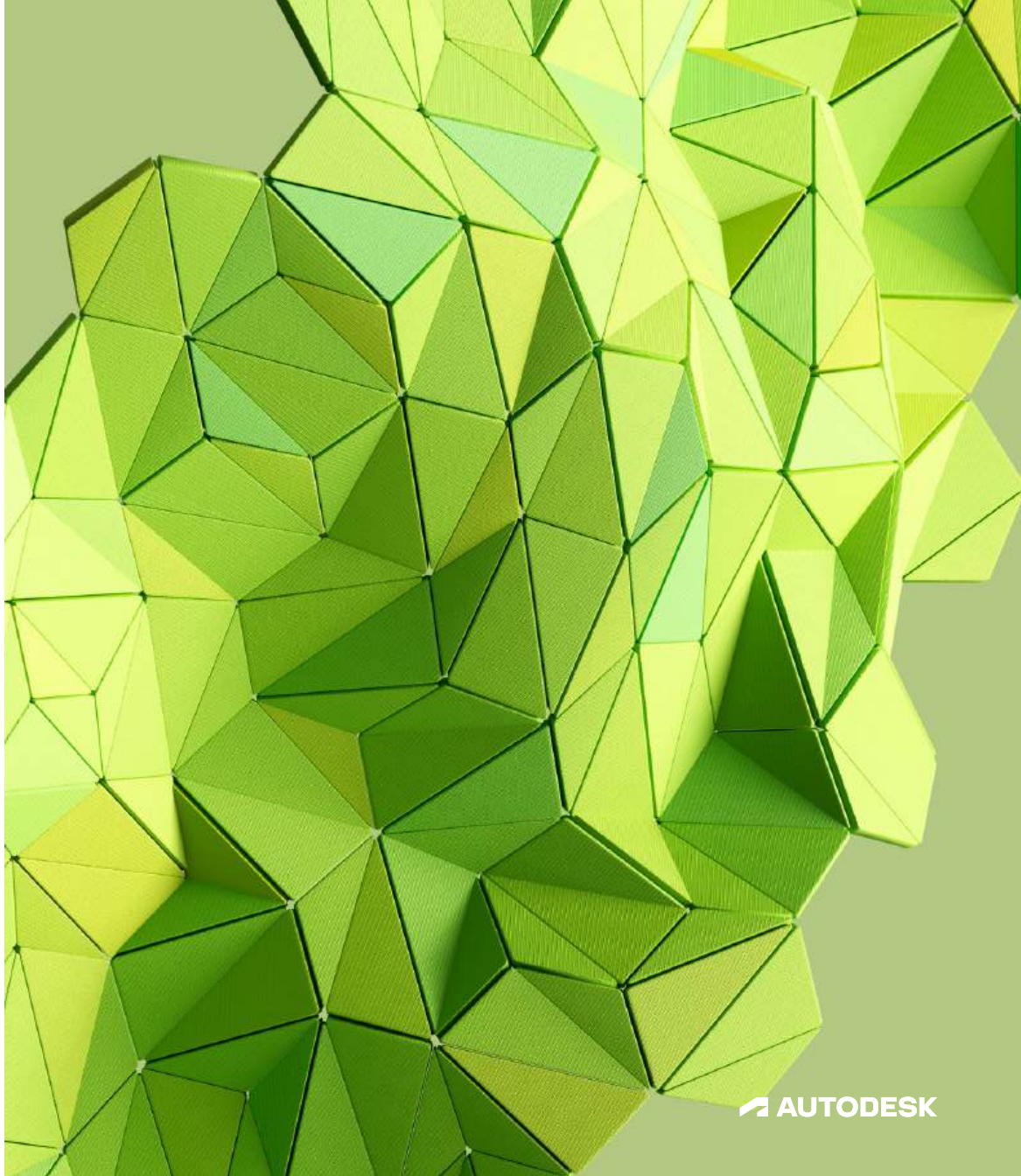
One standout finding this year is that most APAC leaders surveyed say digital transformation efforts led to improvements at their organizations. The majority of organizations benefiting from digital transformation are seeing more than 50% improvements in categories such as customer satisfaction, innovation, 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

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 APAC are 61% 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 9-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 APAC 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.



INSIGHT 1: APAC

Digital transformation efforts have an overwhelmingly positive impact

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INSIGHT 1: APAC

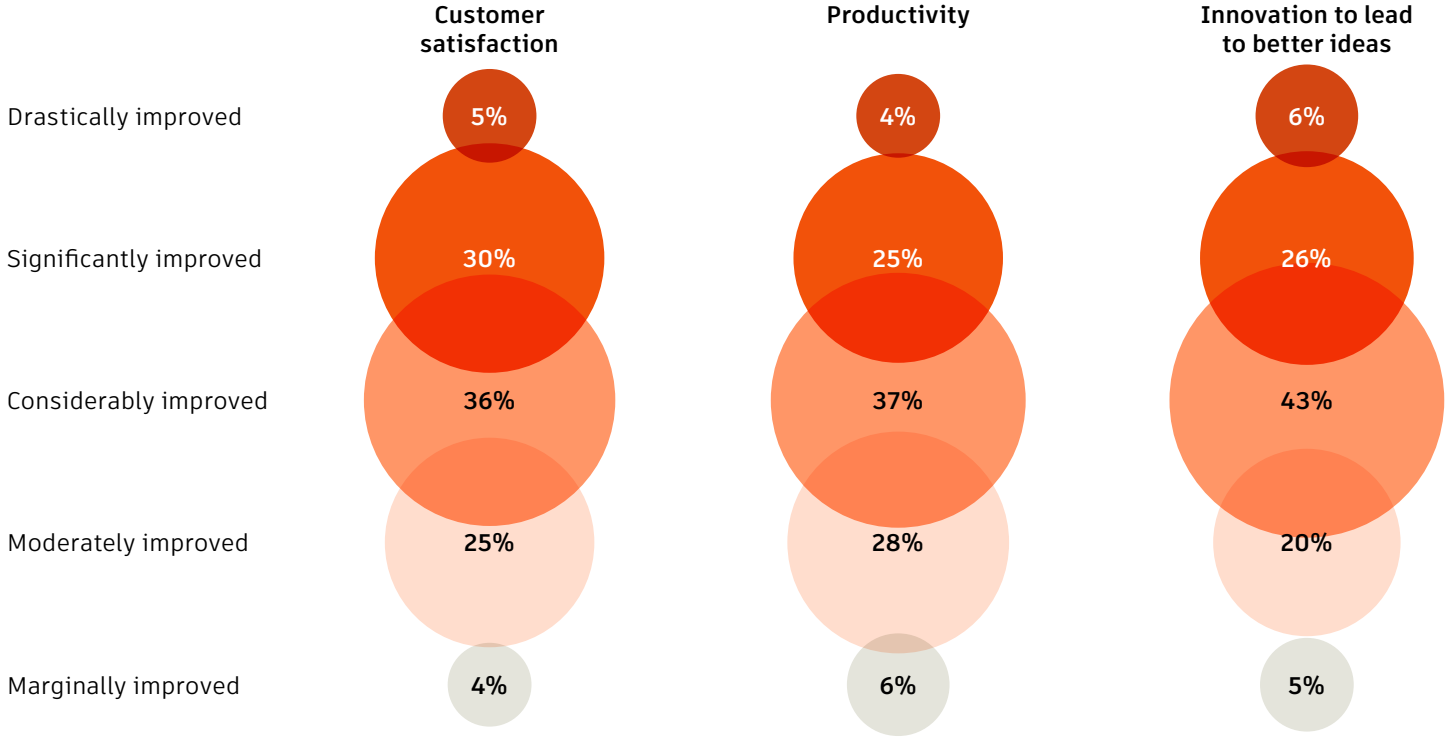
Implementation of new technology is a perennial challenge for leaders in Design and Make industries, but those who tackle the complexities of digital transformation are reaping the rewards of their efforts. In fact, most APAC leaders surveyed for the *2025 State of Design & Make* report have already realized a 50%-plus return on their digital transformation efforts through increases in innovation, productivity, and other categories.

50%+

return on investment from digital transformation

Digital transformation efforts have an overwhelmingly positive impact

Majority of organizations realize more than 50% ROI from digital transformation



APAC respondents. Survey question: Has your company or organization experienced any of the following benefits of digital transformation? Select all that apply. Followed by survey question: You selected [benefit] as a benefit of digital transformation. How much has digital transformation improved [benefit]? Response scale: "Marginally," "Moderately, by 25%," "Considerably, by 50%," "Significantly, by 75%," and "Drastically, by 100%."

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INSIGHT 1: APAC

Along with improvements in customer satisfaction, productivity, and innovation, leaders benefitting from digital transformation report it is also having positive effects on company reputation (73%), expansion of products and services (71%), and improved data exchange (70%).

"Our focus has shifted significantly towards digital transformation. We are integrating advanced digital tools and technologies to streamline the processes, enhance project management, and meet growing client expectations. This includes implementing BIMs in a common data environment, CDE, to enable efficient collaboration and data management."

ANDY YU
Director, Build King Construction Ltd., a construction services company headquartered in Hong Kong

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 APAC, respondents from digitally mature companies report they are ...

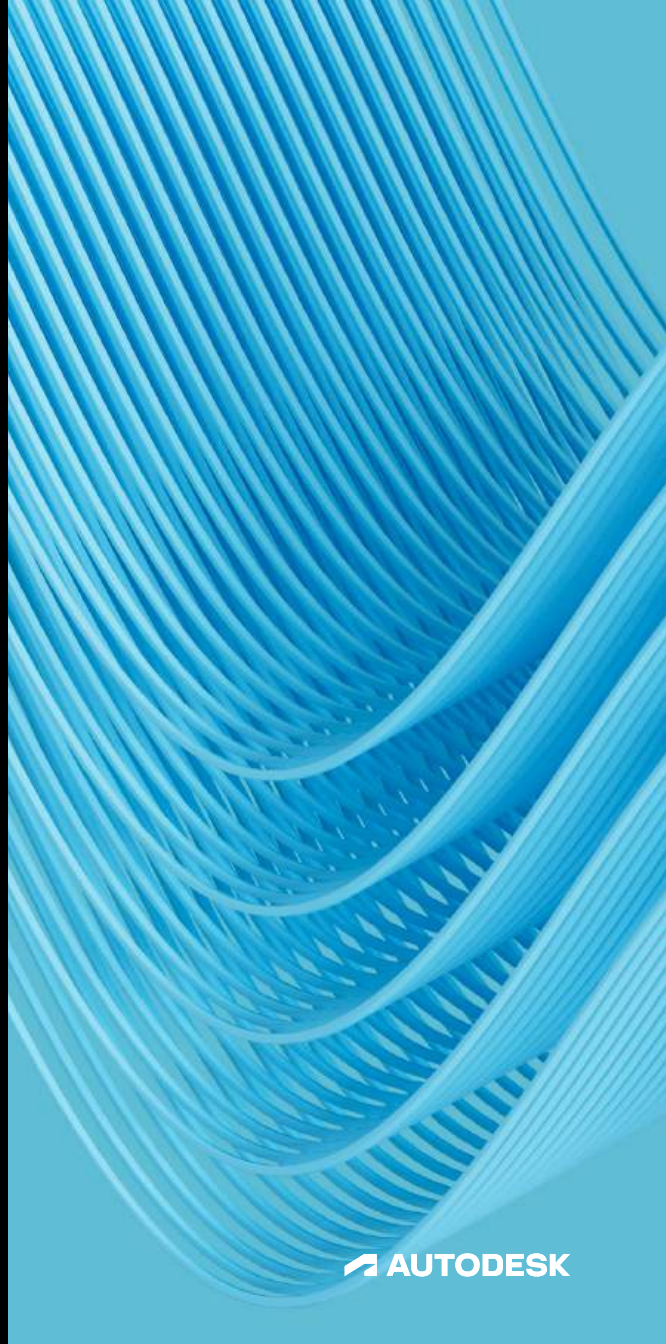
+38%
... more likely to have experienced "above average" or "exceptional" **performance**

+36%
... more likely to "agree" they **are prepared** for the future

+39%
... more likely to have "increased" or "strongly increased" **investment** in the past 3 years

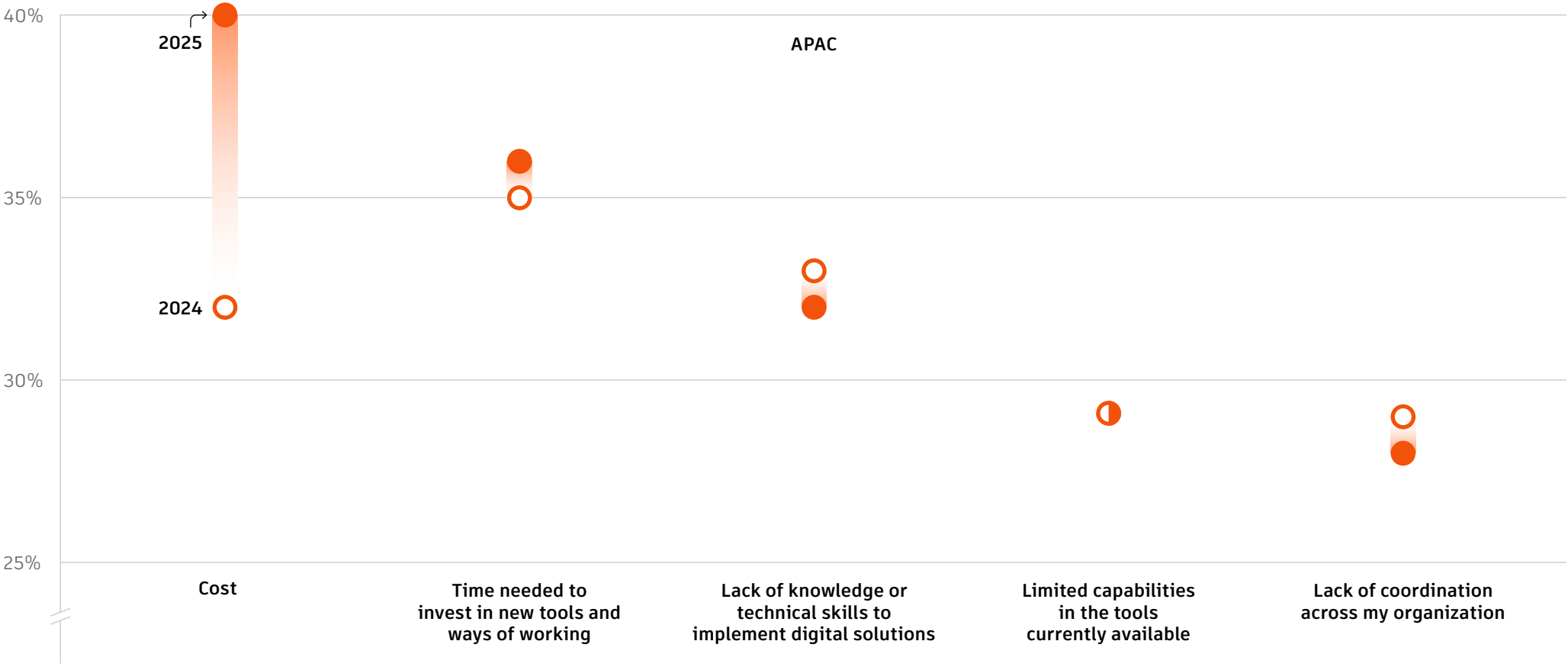
+31%
... more likely to have kept up "very well" with **change in the industry**

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 digitization are clear, and the longer organizations take to get up to speed, the greater the drag on their performance could be. While sometimes challenging, the long-term benefits of digital transformation far outweigh short-term struggles.



INSIGHT 1: APAC

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.

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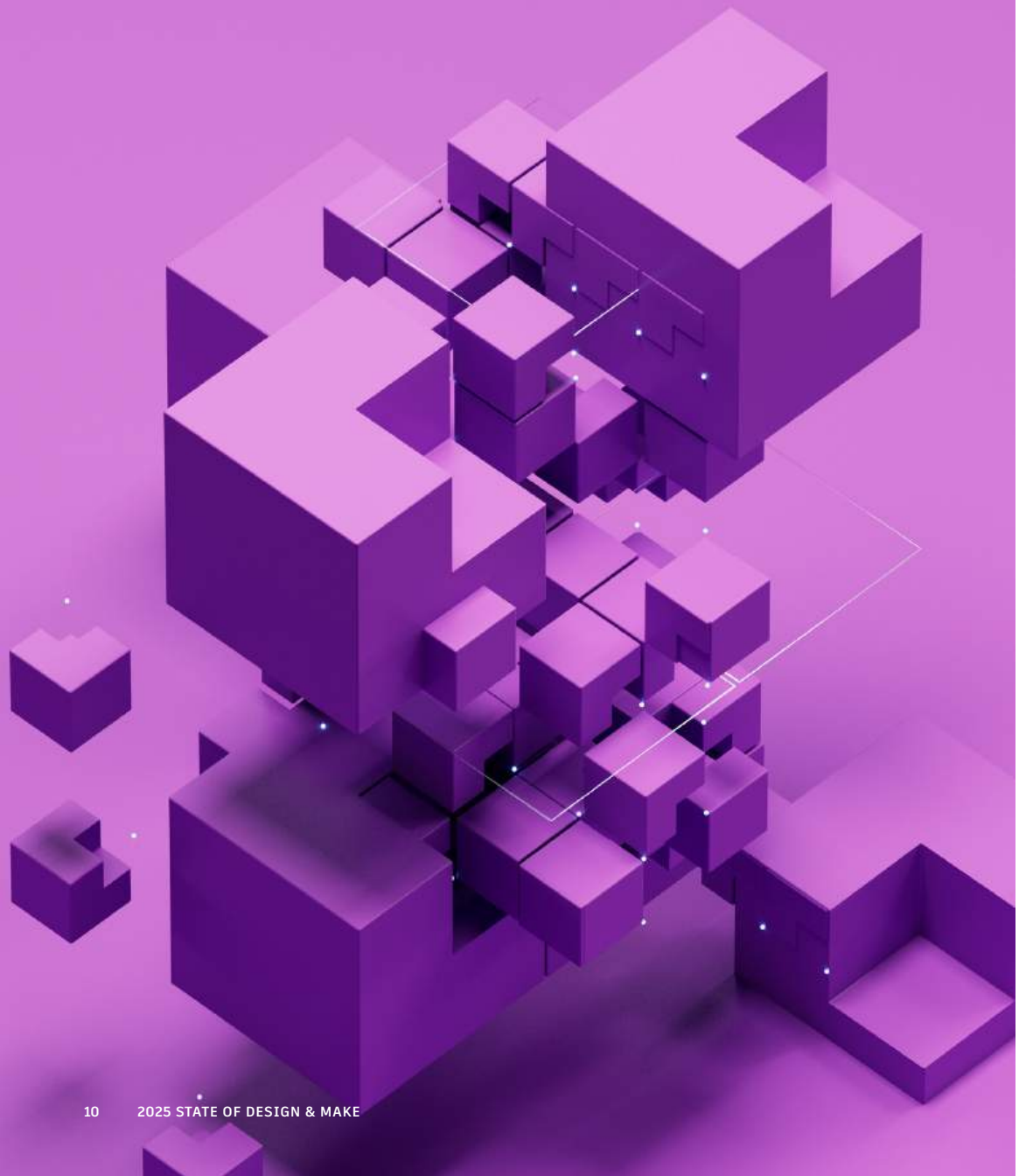

INSIGHT 1: APAC

The cost of digital transformation is a growing challenge for many organizations in APAC, with 40% 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 outsize returns organizations are seeing from their digital transformation investments, cost-cutting measures could have equally outsize negative effects if they impact technology initiatives. Time and talent 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. In APAC, digitally mature companies less often cite cost (36% compared to 44%), and more often cite the limited capabilities of the tools (32% compared to 26%) 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 49% at less digitally mature companies.

INSIGHT 2: APAC

Sustainability transitions from pressure to profitability

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INSIGHT 2: APAC

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 APAC, 71% of business leaders believe that sustainability measures can generate in excess of 5% of their annual revenue, a figure that has remained strong compared to last year (73%) despite this year's cost concerns.

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 in APAC 72% of leaders say their sustainability initiatives were influenced by customers, compared to 78% in 2024.

[2] World Economic Forum, 2023

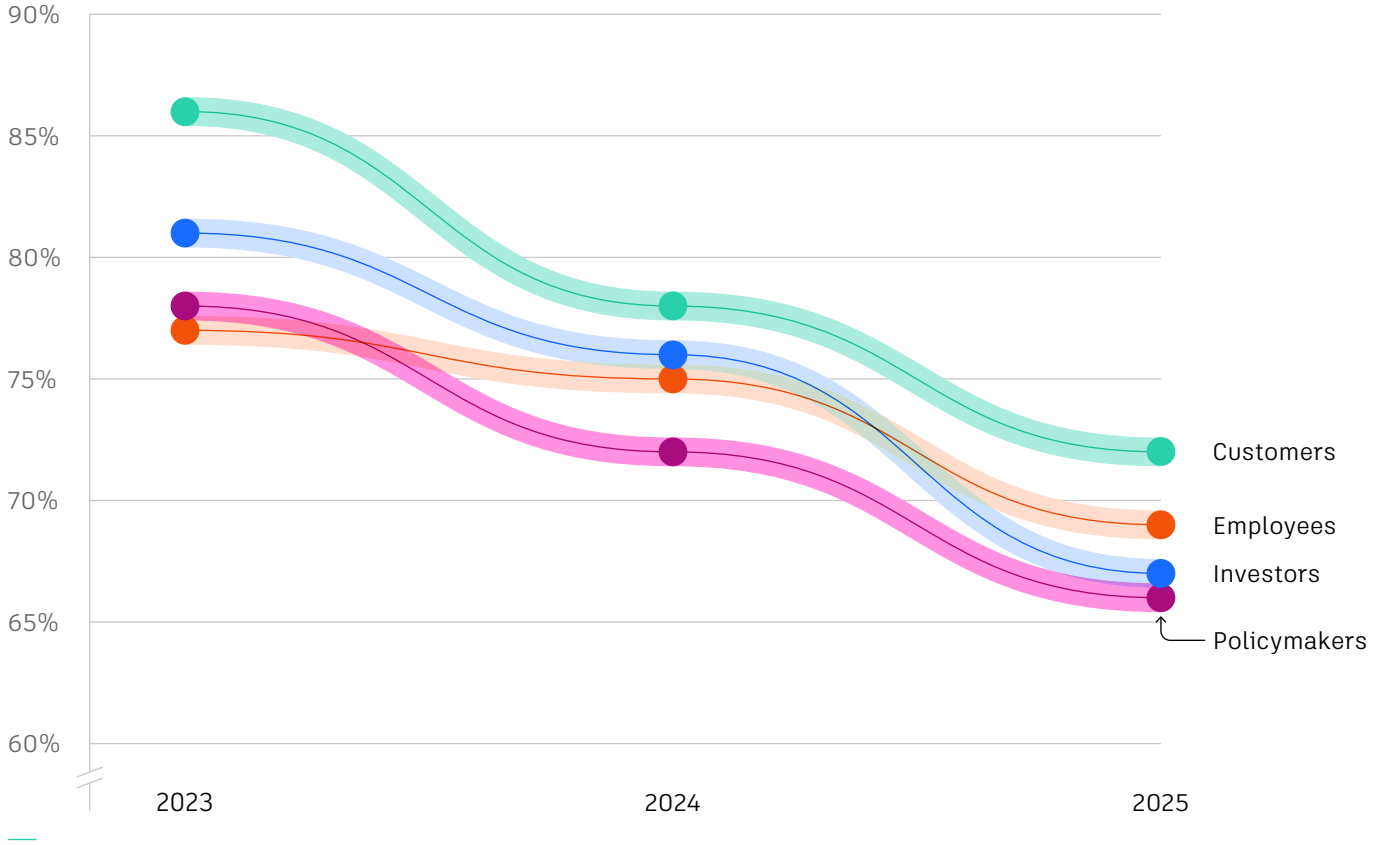
INSIGHT 2: APAC

In APAC, the decline in stakeholder influence is universal across all groups, including customers, employees, investors, and policymakers. New to the survey this year as possible influencers are partners (70%) and suppliers (66%).

While the influence of stakeholder groups is down, sustainability efforts remain steady, with 94% of leaders in APAC reporting their organizations are making changes to be more sustainable. This suggests that organizations are starting to take the reins on sustainability initiatives by incorporating them into long-term strategy rather than allowing external influences to guide decisions.

Stakeholder influence is in decline

Leaders have other reasons for sustainability initiatives



APAC respondents. 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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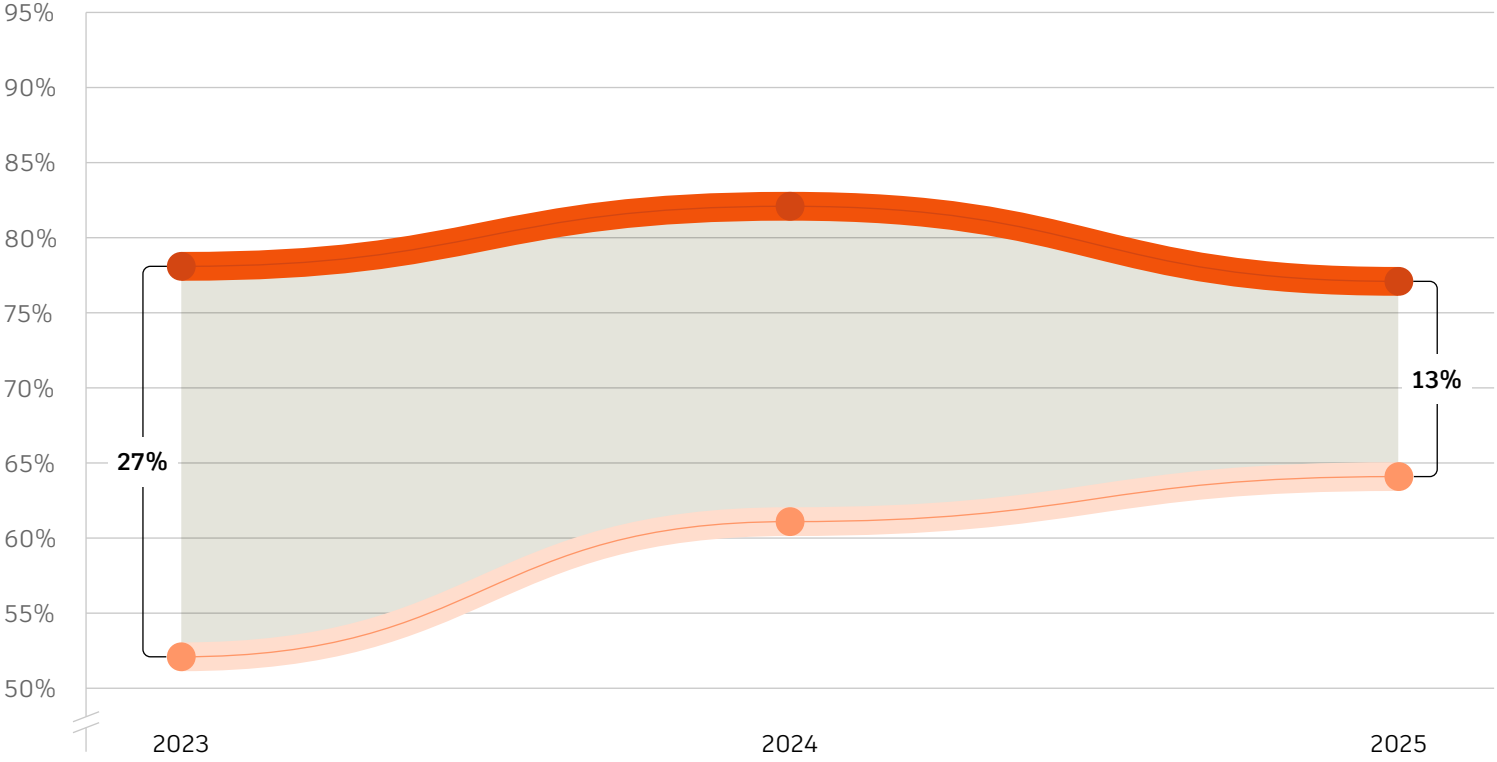
INSIGHT 2: APAC

Closing the gap between long-term and short-term strategy

APAC: Improving sustainability practices is a good **long-term** business decision

Improving sustainability practices is a good **short-term** business decision



Percentage of respondents who agree to statements: 1. Improving sustainability practices is a good long-term business decision. 2. Improving sustainability practices is a good short-term business decision. 5-point scale. Top two = agree. Gap = difference between long-term and short-term for each year.

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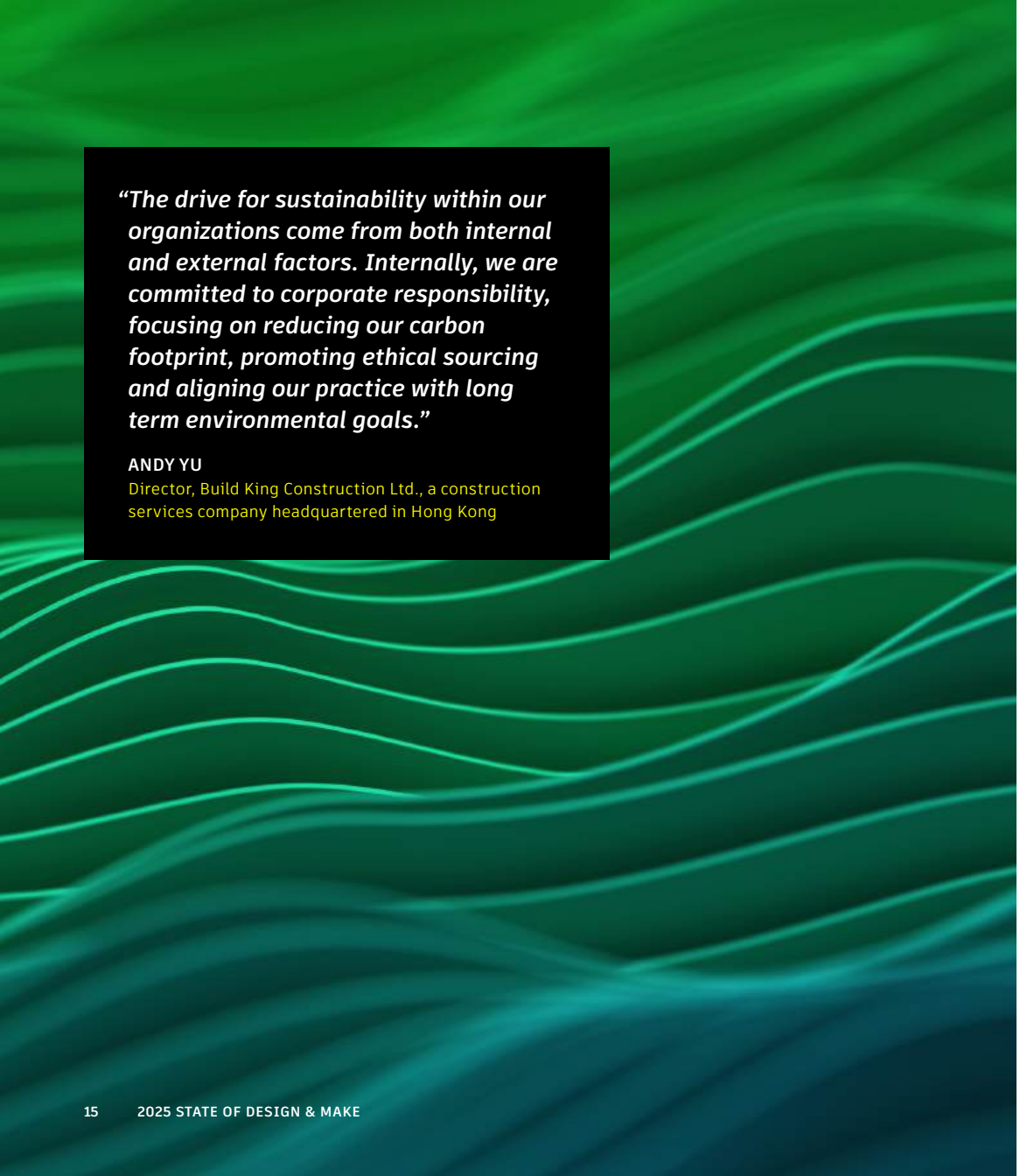


"The drive for sustainability within our organizations come from both internal and external factors. Internally, we are committed to corporate responsibility, focusing on reducing our carbon footprint, promoting ethical sourcing and aligning our practice with long term environmental goals."

ANDY YU
Director, Build King Construction Ltd., a construction services company headquartered in Hong Kong

INSIGHT 2: APAC

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 APAC, the gap between leaders who see sustainability as a short-term versus long-term strategy has narrowed to just 13%, signaling that sustainability is seen as good for business overall.

Digitally mature companies are at an advantage when it comes to reaping sustainability benefits. In APAC, 88% of digitally mature organizations see long-term benefits from sustainability and 77% see short-term benefits, compared to just 66% and 49% respectively at less digitally mature organizations.

Sustainability efforts are also easing talent struggles at digitally mature companies, with 77% of leaders reporting their sustainability efforts help attract and retain talent, compared to 52% 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 APAC, 76% of leaders say they will increase their investments in environmental sustainability, compared to just 49% at less digitally mature companies.

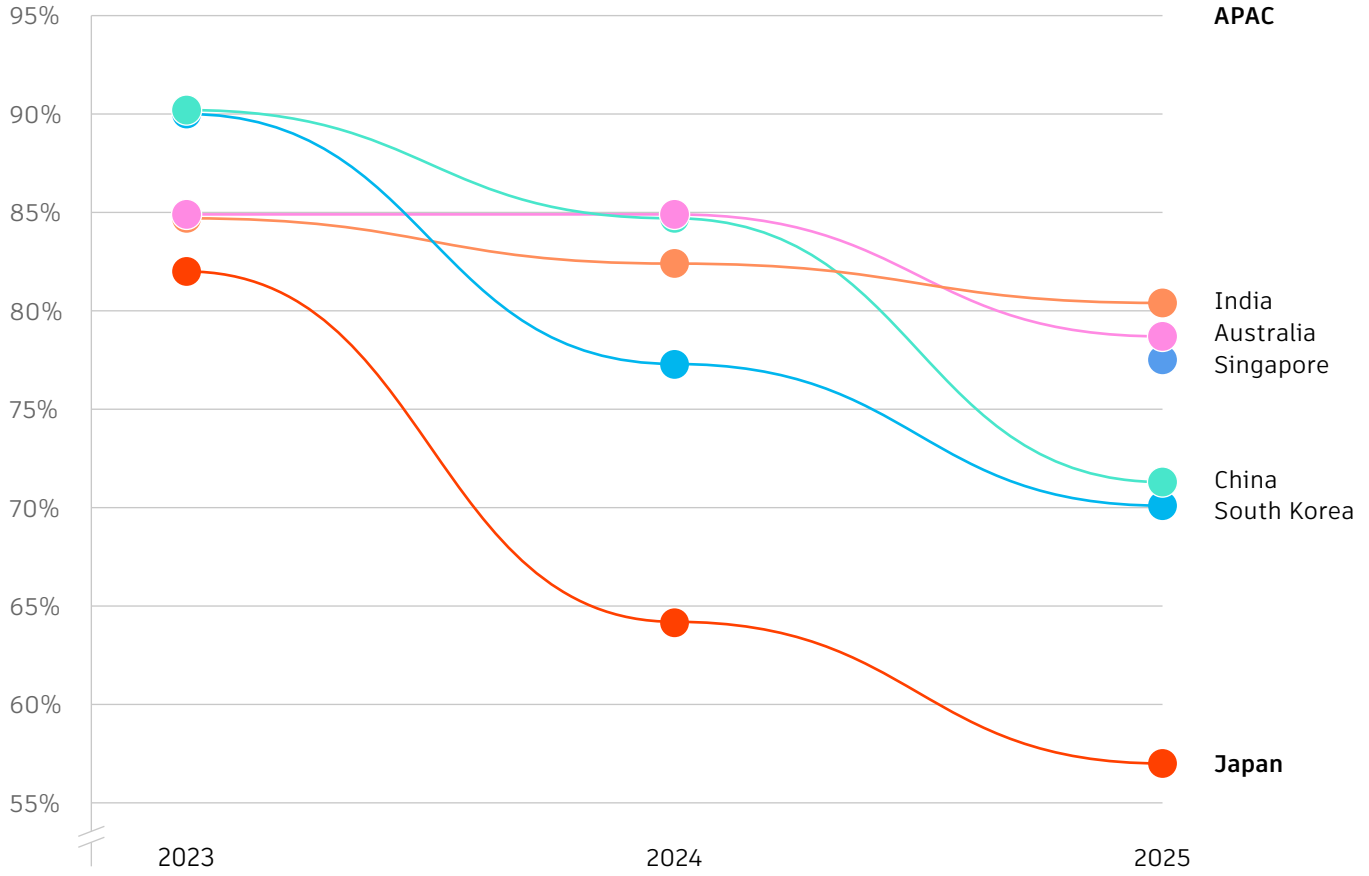
INSIGHT 2: APAC

Today, Japan has the lowest percentage (57%) of business leaders saying that customers are influential in motivating sustainability efforts, trending down from 64% in 2024.

The steepest year-over-year decline in the influence of customers was in China, where the percentage of leaders saying that customer influence drove sustainability efforts fell from 85% to 71%. In Australia, where the percentage of respondents saying customers were influential held steady at 85% for the past two years, that percentage dropped this year to 79%.

> ***"Our company's ultimate goal is to promote social progress. This naturally attracts people with the same values, which are the driving force for our practices."***
>
> **JUN XUE**
> Digital Design Director, Industrial Design, Xiaomi EV, an electric vehicles manufacturer headquartered in China

Japan least 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. Data for Singapore was not gathered for the 2023 and 2024 surveys.

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INSIGHT 3: APAC

AI solidifies its place as the top sustainability enabler

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INSIGHT 3: APAC

For the third year running, AI is the top sustainability enabler for Design and Make industries in APAC with 39% of leaders saying they use AI to be more sustainable, up from 37% last year and 29% 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.

39%

of businesses in APAC have used AI to be more sustainable

[3] Ellen MacArthur Foundation

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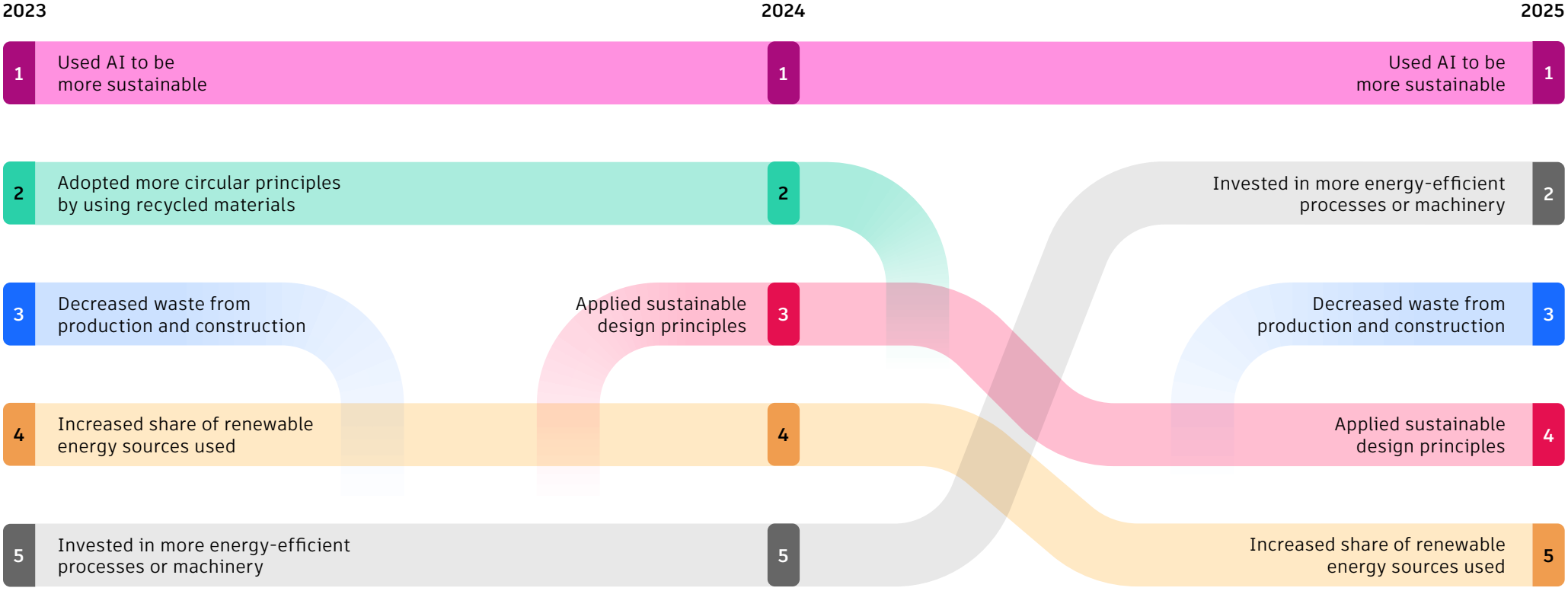
INSIGHT 3: APAC

The continuing integration of AI and sustainability

APAC: AI is the top sustainability enabler for the third year in a row



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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INSIGHT 3: APAC

The integration of AI into sustainability efforts is having an impact across Design and Make industries in APAC. 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 report using the technology for sustainability more than less digitally mature organizations (43% and 35%, 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 they 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.

INSIGHT 3: APAC

In 2024, China was the global leader in using AI for sustainability—but no longer. Then, 53% of leaders in China said their organizations used AI for sustainability efforts. This year, that number dropped to 38%.

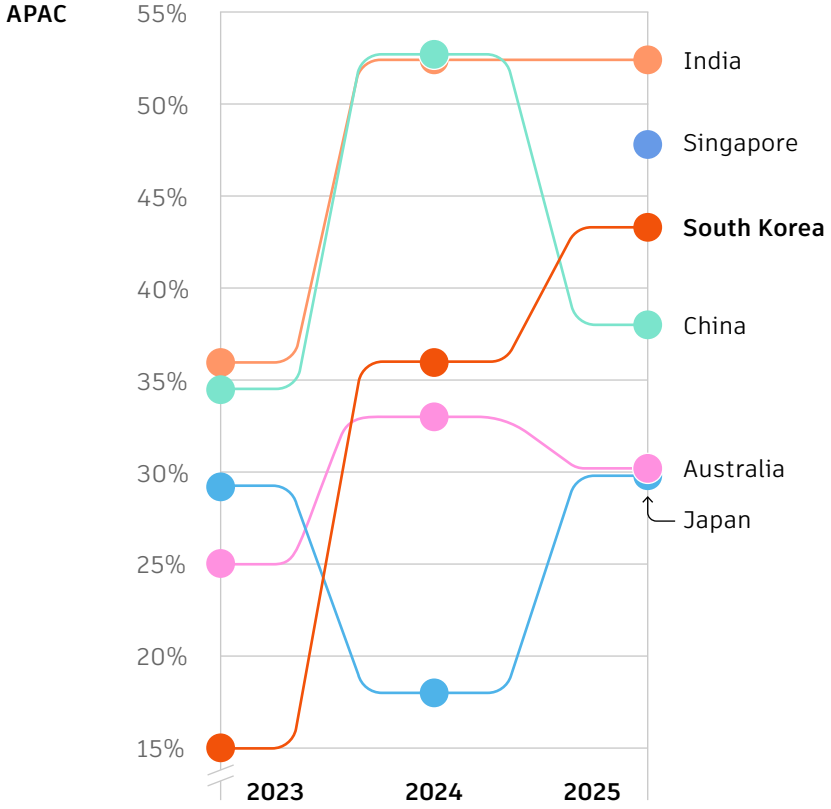
Taking the lead on incorporating AI into sustainability efforts this year is India, with 52% of business leaders using AI as a sustainability enabler. While this number remains flat for the past two years, it suggests a steady commitment to the strategy and is well above the global average of 39%.

The steepest and most consistent increase in AI adoption for sustainability is among business leaders in South Korea, with 43% of leaders saying they use the technology, up from 36% in 2024 and 15% in 2023.

Within APAC, the countries where the lowest percentage of respondents say their companies are using AI to drive sustainability are Japan and Australia (30%).

> ***"We are very interested in increasing work efficiency and productivity for individual employees that we have. An AI-based productivity gain is what we are going after. We try to harness AI and other related tools to improve the efficiency and productivity of every architect so they can do more with their time."***
>
> **YONGSIK JEONG**
> Vice President, Sustainable Design Team, Samoo Architects & Engineers, a global architecture and engineering firm headquartered in South Korea

South Korea sees the largest increase in AI adoption for sustainability



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. Data for Singapore was not gathered for the 2023 and 2024 surveys.

INSIGHT 4: APAC

The AI hype cycle meets reality

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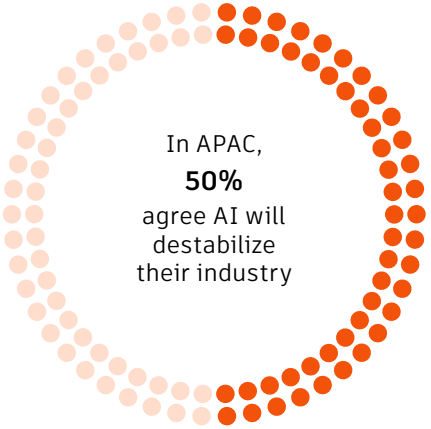
INSIGHT 4: APAC

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. The *2024 State of Design & Make* survey results underscored this enthusiasm, with 72% of leaders saying that AI would enhance their industry.

But the reality of AI hasn't yet lived up to the hype, according to leaders in APAC. Sentiment toward AI and other emerging technologies is down significantly year over year, with just 68% of business leaders saying AI will enhance their industry—representing a 6% drop from 2024. Industry disruption from AI is also a major concern, with 50% 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.



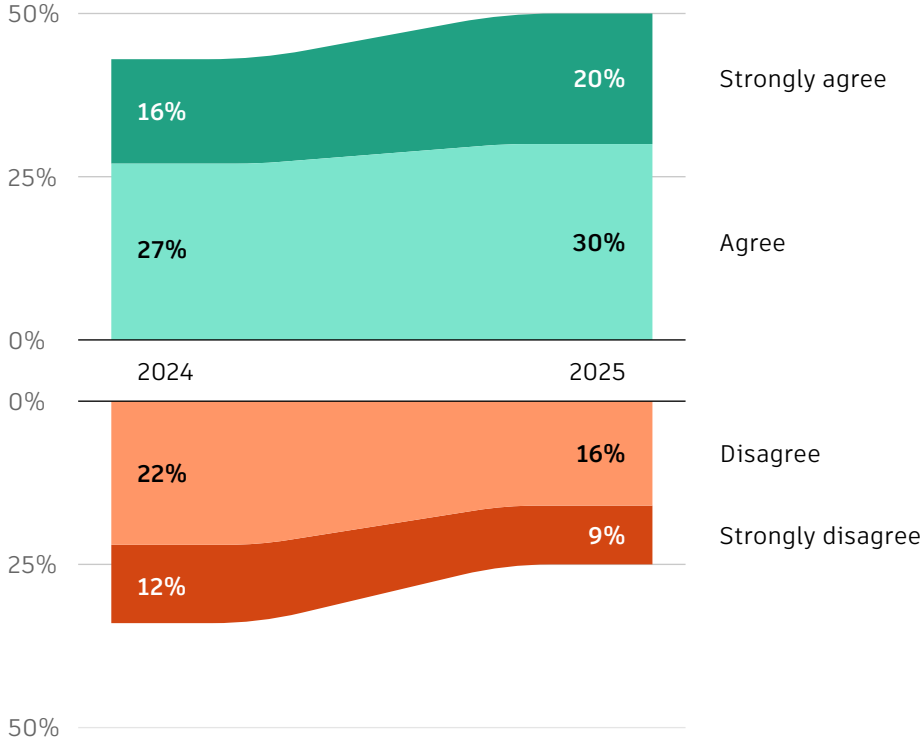
INSIGHT 4: APAC

Half (50%) of leaders and experts in APAC agree AI will destabilize their industry, up from 43% in 2024, and representing a 16% 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 (61%) compared to less digitally mature companies (39%). 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

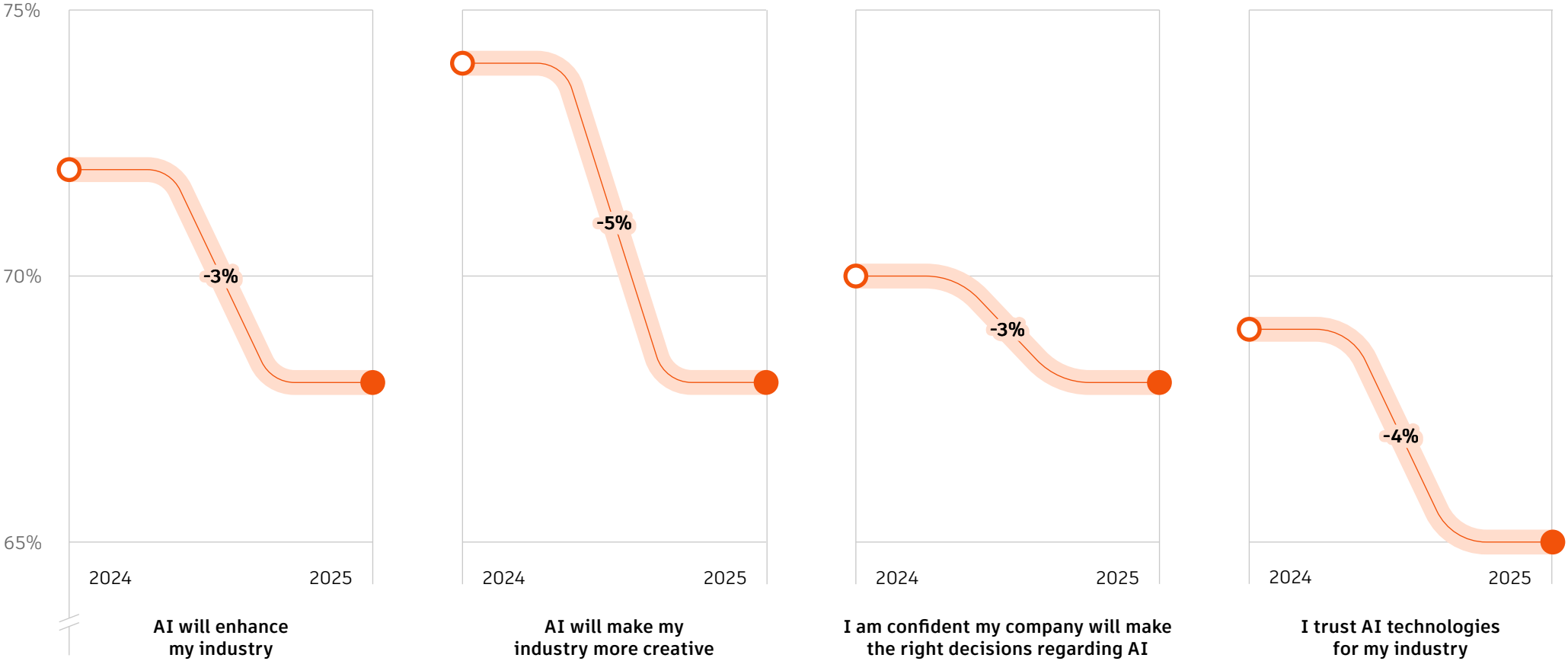
Half of business leaders agree AI will be destabilizing



APAC 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.

INSIGHT 4: APAC

AI sentiment is down across the board



APAC 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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INSIGHT 4: APAC

Concern about disruption is up and overall positivity about AI has dropped significantly from 2024. Trust in AI technology for Design and Make industries in APAC has decreased 4 points year-over-year, representing a 6% 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.

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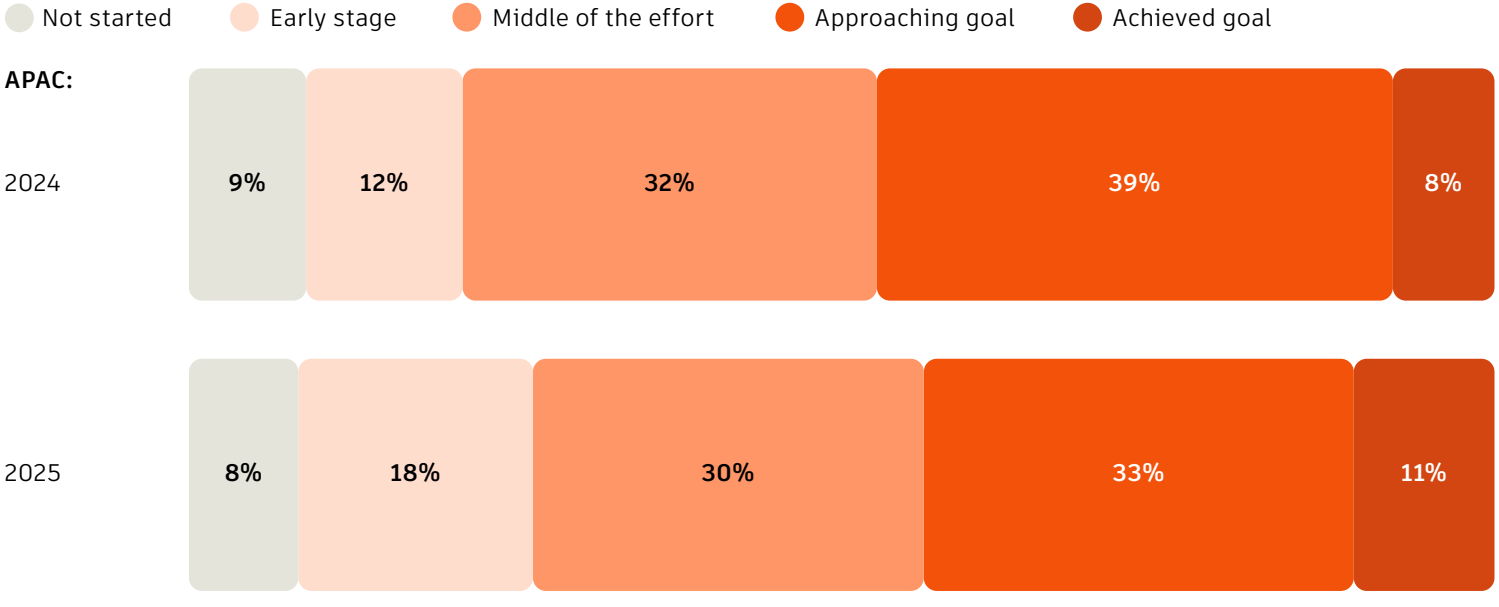
INSIGHT 4: APAC

AI journeys adjust to reflect implementation realities



Survey question: Where is your company or organization in incorporating artificial intelligence (AI) technology?
5 point scale.

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INSIGHT 4: APAC

> *"I think that generative AI is important, but when generative AI first appeared, there was an excessive sense of expectation towards generative AI and AI in general, and I think that we have just passed the peak of that. There was an impression that generative AI could do anything, but in fact there are things that it is suited to and things that it is not suited to, and I think that we have finally come to understand that."*
>
> **FUMIHIRO OJIMA**
> General manager, Digital Innovation Department, Value Creation Office, Tokyu Construction Co. Ltd., a Japanese civil engineering and building construction company

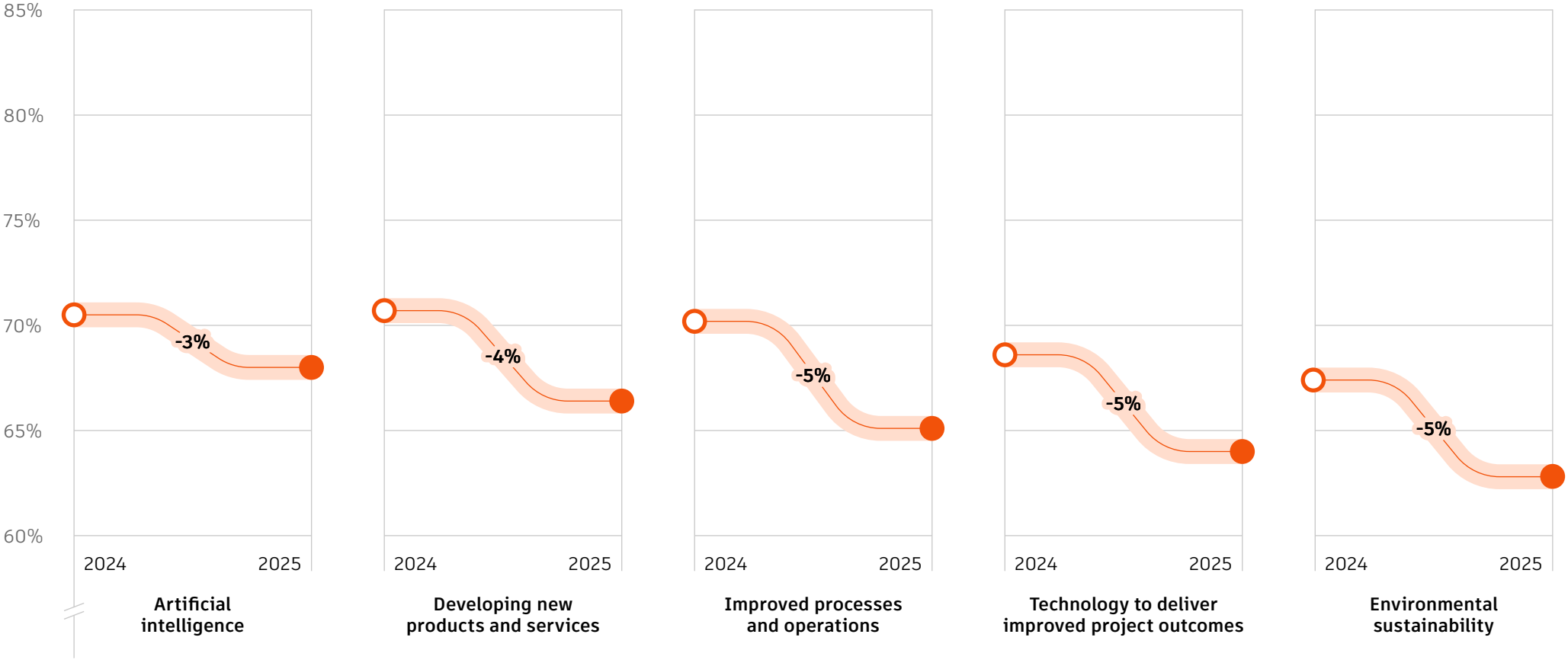
In 2024, leaders in APAC were confident about progress toward reaching their AI goals, with 47% saying they were approaching or had already achieved their goals. This year, as leaders are faced with the complexities of implementing AI solutions across their organizations, they are rethinking where they are on their AI roadmaps.

Only 44% of leaders in APAC say they are approaching or have achieved their AI goals, a 3-point decrease, that represents a 6% decline year-over-year. Leaders are more conservative this year when estimating their progress, with a 9% year-over-year 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. In APAC, 78% of leaders at digitally mature organizations say they will increase investment in AI, compared to 58% 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.

INSIGHT 4: APAC

Investments dip overall but remain high in AI



APAC 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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INSIGHT 4: APAC

Despite implementation challenges and a dip in sentiment, Design and Make leaders in APAC are still optimistic about AI's potential. When asked how their organization's investments will shift over the next few years, 68% of respondents say their investments in AI will increase.

> *"AI requires a much larger investment than we expected. So, there is a bit of a delay moving forward. And, not all things related to AI are positive signals; there are clear limitations. We look at AI in two different ways: we can use AI more practically in our work processes, and our employees can harness AI to effectively increase their efficiency and productivity. We are also exploring new business areas related to AI, which is a longterm effort that requires more time. We see AI developing very fast. The level of technology we looked into last year is completely different, and we clearly believe that we will be able to reach ROI when we invest in AI for new business opportunities and business areas."*
>
> **YONGSIK JEONG**
> Vice President, Sustainable Design Team, Samoo Architects & Engineers, a global architecture and engineering firm headquartered in South Korea

INSIGHT 5: APAC

Cost, tech, and talent are top concerns

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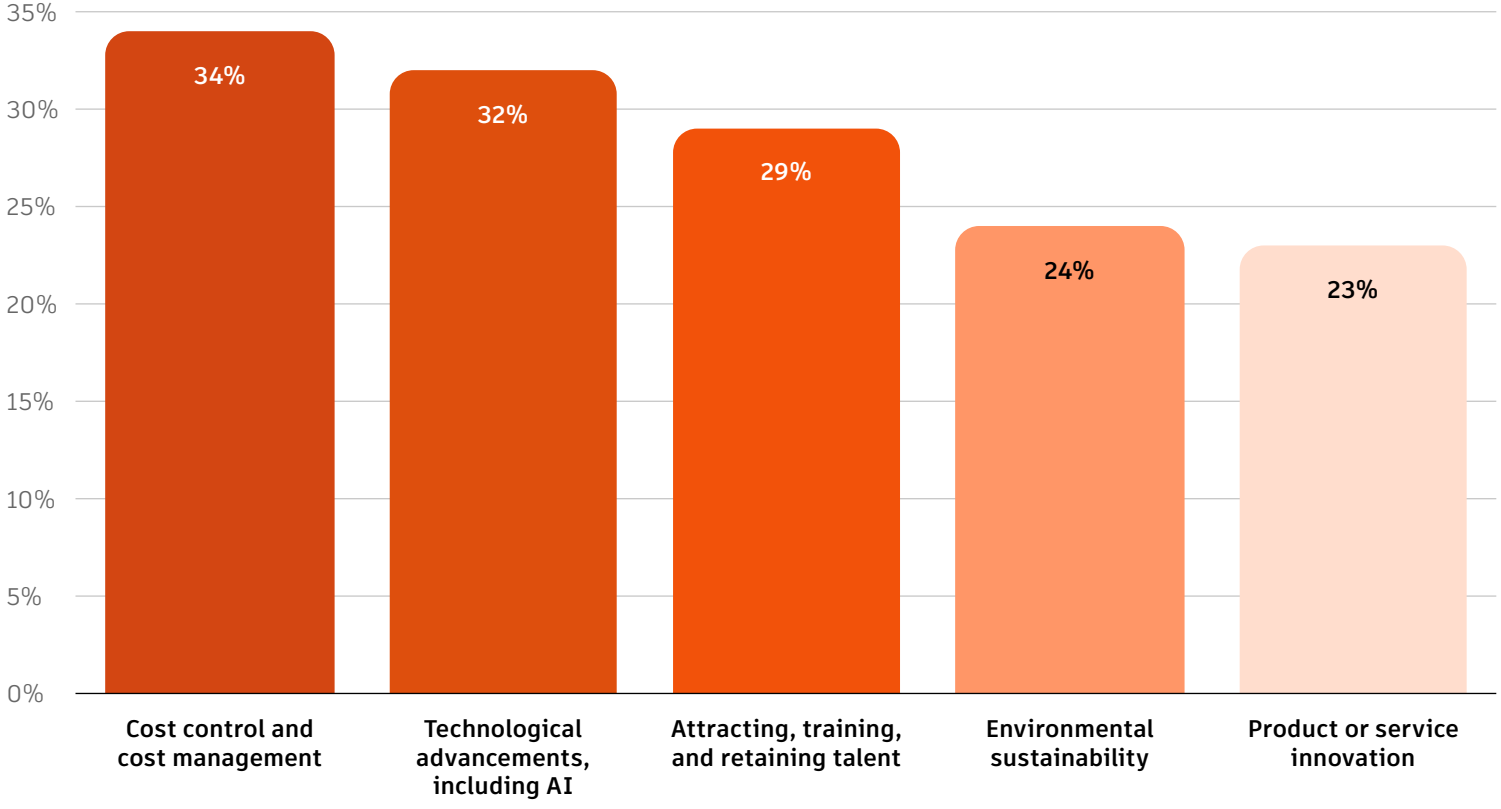
INSIGHT 5: APAC

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 APAC, with 34% 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



APAC 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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INSIGHT 5: APAC

Thirty-two percent of leaders in APAC 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.

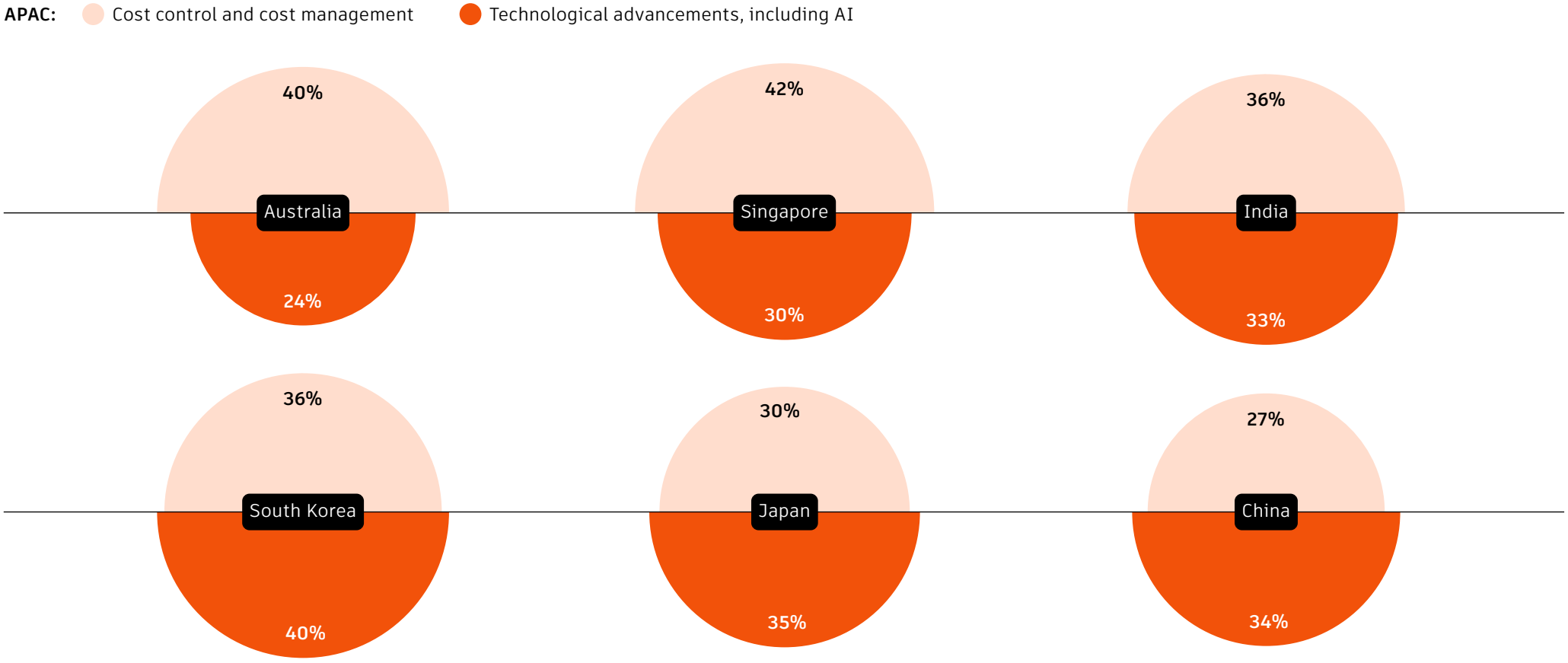
Ironically, cutting investment in technology can have a negative impact on budgets, since new tools and processes can often lead to greater efficiencies across the organization. For instance, leaders at data-effective organizations see cost as less of a challenge—just 24% identify it as a top concern compared to 37% at other organizations.

Talent remains a perennial struggle, identified by 29% 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.

> ***"In contemporary society, de-globalization trends are gaining momentum, posing significant challenges to our global operations. Political and economic changes, such as increased tariffs, directly affect our international trade. Consequently, we must strategically maintain our business layout both domestically and internationally amidst these uncertainties."***
>
> **WEI FENG LU**
> Senior Vice President, Morimatsu International Holdings Company Ltd., a global manufacturing and solutions company headquartered in China

INSIGHT 5: APAC

APAC region split on top challenge



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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INSIGHT 5: APAC

When leaders in APAC were asked about their organization's top three challenges, their answers tended to differ depending on the country.

Japan is the only country surveyed where attracting, training, and retaining talent is the most cited challenge; leaders in Australia, India, and Singapore are more concerned with cost, aligning with global findings.

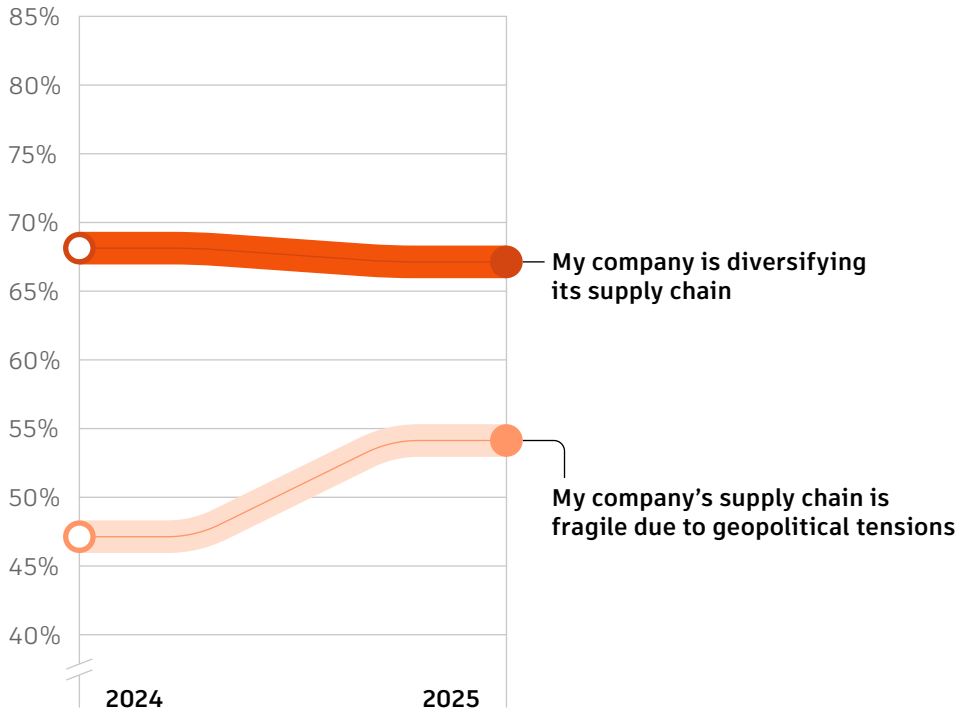
In contrast, respondents in South Korea, Japan, and China say they are more concerned with technology than with costs, signaling that these countries could be encountering significant roadblocks with implementation at their organizations. Leaders in Australia are both the most concerned about costs (40%) and the least concerned about technology and AI (24%), a deviation from global results.

> ***"We are a very old organization with aging infrastructure. There's a certain amount of investment year-over-year that is purely to keep the facilities running."***
>
> **SHARMY FRANCIS**
> Manager – Innovation, InfraBuild, a steel manufacturing company headquartered in Australia

INSIGHT 5: APAC

Supply chains remain fragile and undiversified

Supply-chain diversification is down despite increased global uncertainty



APAC 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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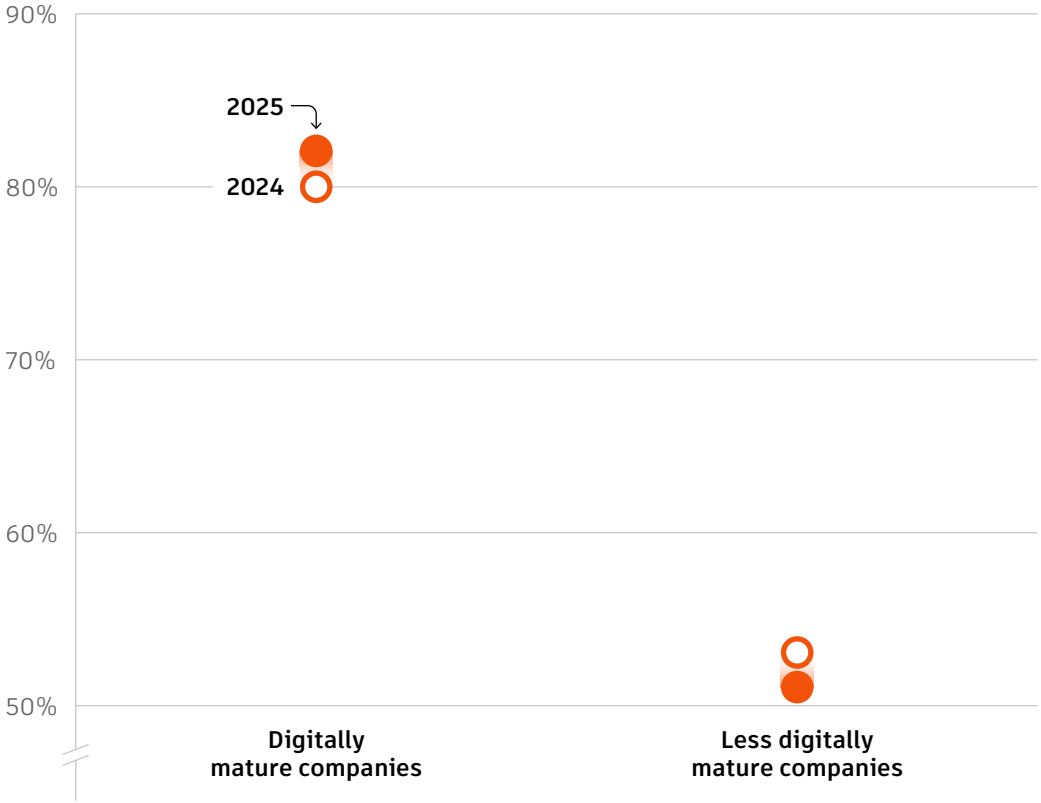
INSIGHT 5: APAC

Digitally mature companies 61% more likely to diversify their supply chains



APAC 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 APAC, with 54% of business leaders saying their supply chain is fragile due to geopolitical tensions, up from 47% last year.

Despite this increased fragility, the percentage of leaders who say they are diversifying their supply chains remained flat year-over-year at 67%. 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 APAC were 61% more likely to diversify their supply chains—giving them a significant edge when it comes to resilience.

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INSIGHT 6: APAC

Leaders are cautious in the near term

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INSIGHT 6: APAC

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 APAC, 68% of 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 61% saying they are well prepared, down from 66% 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 more uncertain

+9 points
from 2024

Leaders feel less prepared to handle unforeseen future changes

−5 points
from 2024

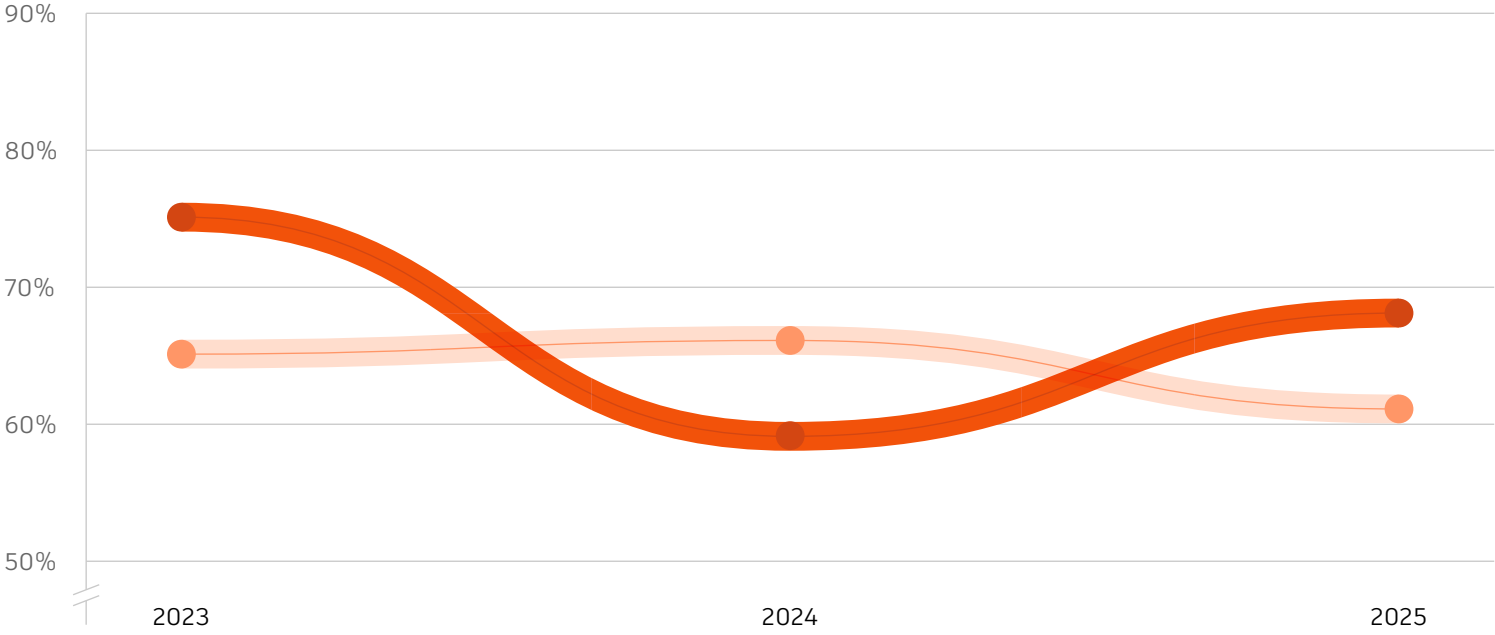
INSIGHT 6: APAC

Leaders feel more uncertain about the future and less prepared to face it

Global uncertainty is affecting organizational confidence

APAC: My company is well prepared to handle unforeseen future change

The future global landscape feels more uncertain now than 3 years ago

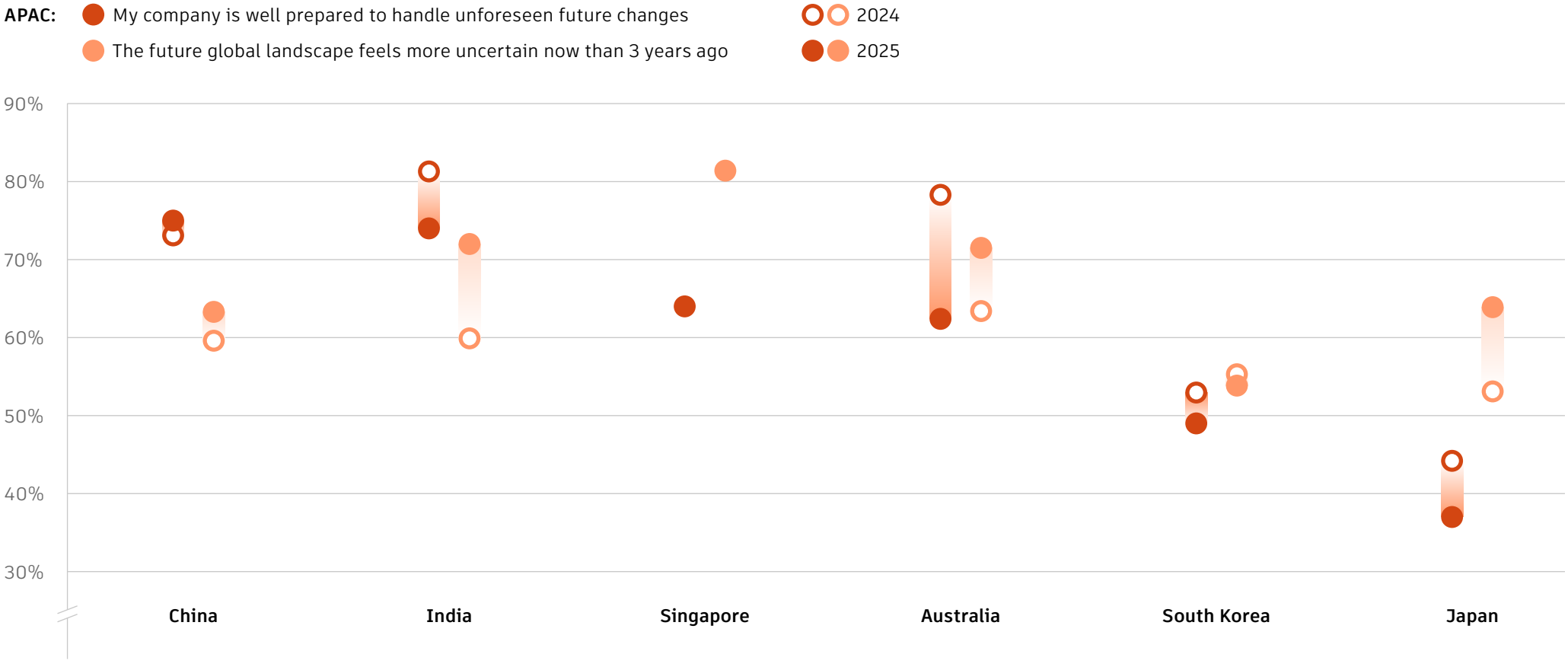


Percentage of respondents who agree to statements: 1. My company is well prepared to handle unforeseen future macroeconomic and geopolitical changes. 2. The future global landscape feels more uncertain now than 3 years ago. 5-point scale. Top two = agree.

But amid uncertainty, some organizations in APAC are faring better than others. Leaders at digitally mature organizations, for example, feel better prepared to handle unforeseen changes—79% of leaders at these companies feel prepared, compared to only 43% at less digitally mature organizations. And data-effective organizations are most confident, with 85% of leaders at those organizations feeling prepared to handle unforeseen changes. This points to yet another advantage of digitalization across Design and Make industries in APAC: increased resilience.

INSIGHT 6: APAC

Japan's leaders feel the least prepared, Singapore's the most uncertain



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. Data for Singapore was not gathered for the 2023 and 2024 surveys.

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INSIGHT 6: APAC

Most APAC business leaders echoed global trends, with an increase in the perception of uncertainty and a decline in feeling well prepared to handle unforeseen changes in the future.

China was the only country that saw an increase, however slight (60% to 63%), in the percentage of respondents agreeing that their companies are well prepared to handle unforeseen changes. Leaders in Japan (37%) and South Korea (49%) feel less prepared to handle unforeseen macroeconomic and geopolitical changes.

Overall, Singapore had the highest percentage of respondents saying that uncertainty is on the rise, with 81% agreeing the future global landscape is more uncertain, while South Korea is feeling the most confident about the global landscape, with a 2-point decline in uncertainty.

> ***"In uncertain times, many businesses prioritize stability over expansion. Issues such as supply chain, rising costs, and market instability lead companies to focus more on efficiency improvement and digital transformation."***
>
> **ANDY YU**
> Director, Build King Construction Ltd., a construction services company headquartered in Hong Kong

INSIGHT 7: APAC

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

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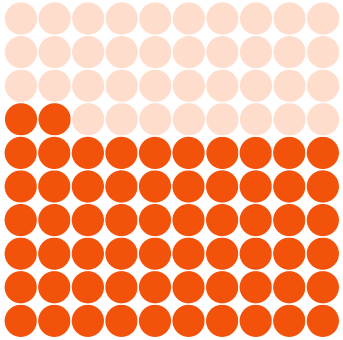
INSIGHT 7: APAC

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 APAC, 62% of business leaders say that lack of access to skilled talent is a barrier to their company's growth, up from 50% in 2024.

When it comes to bridging and filling the skills gap, digitally mature companies are at a distinct advantage. In APAC, 78% of digitally mature companies will invest more in digital training, compared to 55% of less digitally mature companies. They are also more likely to implement continuous learning programs than less digitally mature companies, at 76% and 50% respectively. Digitally mature companies also see a boost when it comes to talent. In APAC, 28% of digitally mature companies report improved talent acquisition and retention as a benefit of digital transformation compared to only 19% of less digitally mature companies.

62% in APAC say they have difficulty finding employees with the right skills



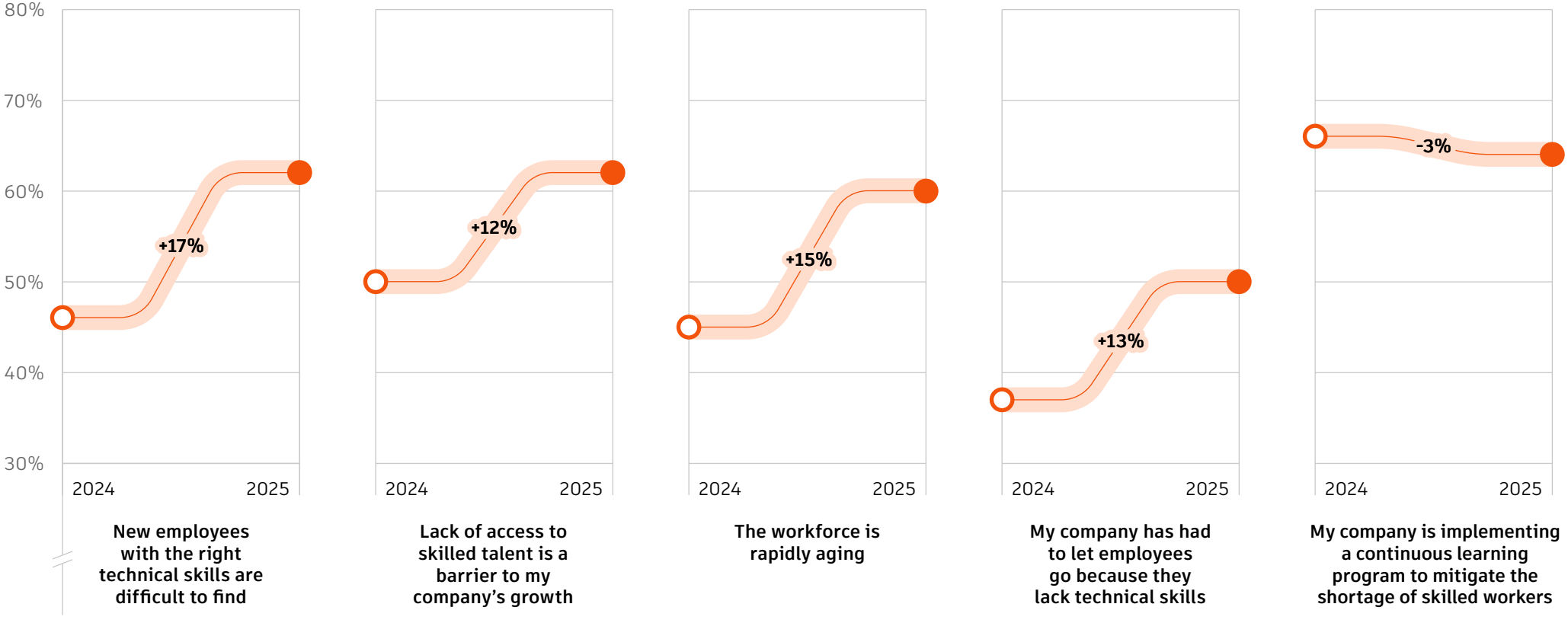
In APAC, 62% of business leaders agree that new employees with the right technical skills are difficult to find, up from 46% the previous year. Moreover, the number of leaders who say they have had to let people go because they lack technical skills has jumped to 50%, up from 37%, compounding labor shortage problems.

> *"This year, our company is reviewing its investment plan and is considering significantly increasing its investment in human capital. We have fallen behind in securing human resources, so we have decided to invest in increasing salaries. We are also planning to invest up to 38 billion yen in digital technology by 2030. The reason for investing in human capital is that if we are simply losing out on salary, people won't come, and if we don't raise the standard as an industry, people won't come to the construction industry. In particular, working for a general contractor means that you can't avoid being transferred to a different location, and this is something that the current generation really dislikes. "*
>
> **FUMIHIRO OJIMA**
> General manager, Digital Innovation Department, Value Creation Office, Tokyu Construction Co. Ltd., a Japanese civil engineering and building construction company

INSIGHT 7: APAC

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



APAC 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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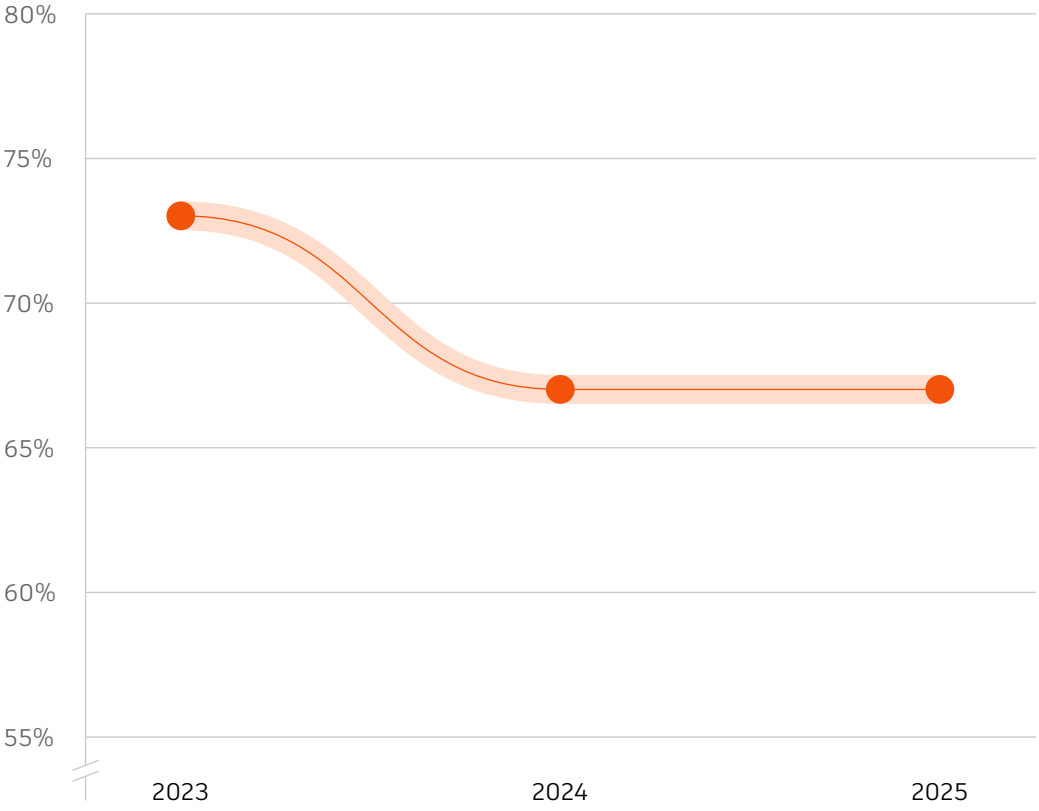
INSIGHT 7: APAC

Despite the skills gap, investment in training is down



APAC 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 has declined to 64%, down from 66% in 2024.

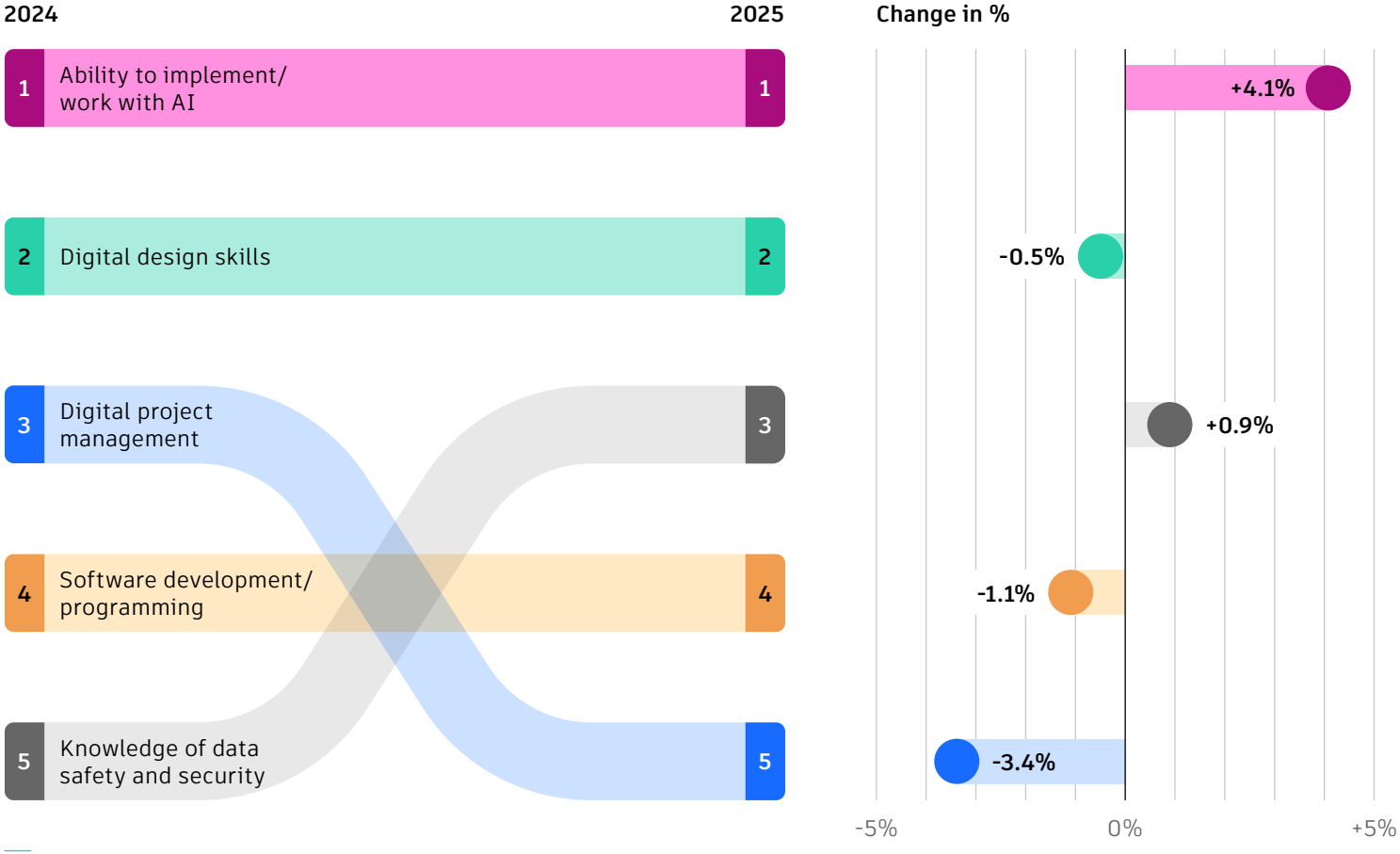
Budget aside, training holds other challenges. In APAC, 52% of respondents say they do not have the resources to design internal training programs, up 8 points over last year, indicating that the tight labor market is impacting initiatives across organizations.

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 the majority (54%) of leaders in APAC saying these do not meet the needs of their organization.

> *"We need people to manage data. In the construction industry, there may not be many of them to begin with. In the future, when the objects we handle shift from drawings and models to data, I think people who manage that data will be quite important."*
>
> **HIDENORI SAITO**
> Department Manager of the DX Strategy Division and BIM Management Office, Takasago Thermal Engineering, an air conditioning equipment company headquartered in Japan

Forty-five percent of leaders in APAC say the ability to work with AI will be their top priority when hiring in the next few years, up from 41% last year. This indicates that, despite a more cautious approach to the technology this year, leaders are still dedicated to integrating AI into their organizations.

AI skills top the list of future hiring priorities



APAC respondents. Survey question: What technical or digital skills do you believe your company or organization will be prioritizing when hiring over the next 3 years? Select all that apply.

INSIGHT 8: APAC

Investments remain strong but reflect uncertainty

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INSIGHT 8: APAC

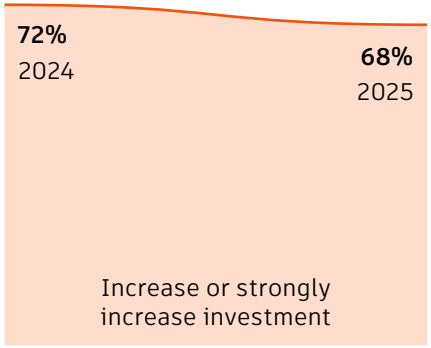
> *"We service the Australian market, and, other than New Zealand, we don't export. We are somewhat of an island, and even our island is seeing the effects of what's going on in the world. Construction is down, investment is down, and available funding is down. That's a reaction to what's going on in the world."*
>
> **SHARMY FRANCIS**
> Manager – Innovation, InfraBuild, a steel manufacturing company headquartered in Australia

Future investment projections have fallen this year but are still robust—68% of business leaders in APAC 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 72% 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 84% of leaders planning to increase future investments, compared to 50% at less digitally mature companies.

Further, future investments are higher at data-effective companies where 90% 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.

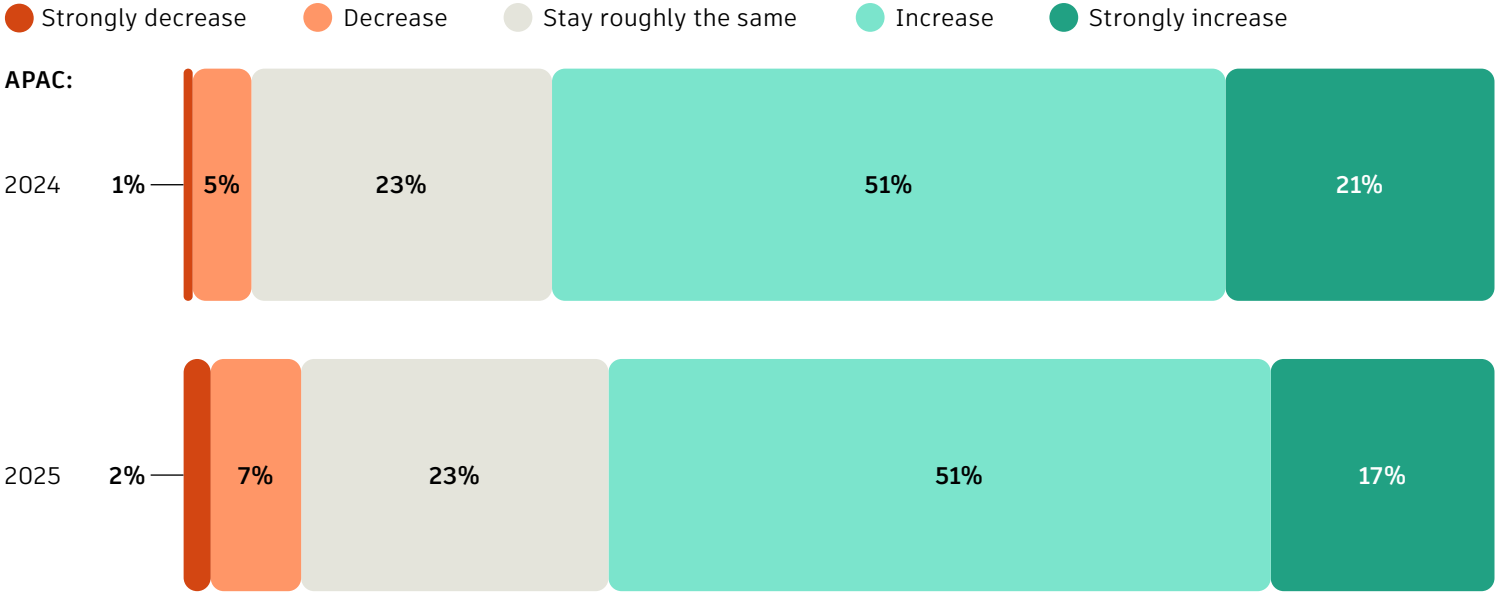
APAC businesses scale back investment plans



INSIGHT 8: APAC

Future investments still robust

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



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.

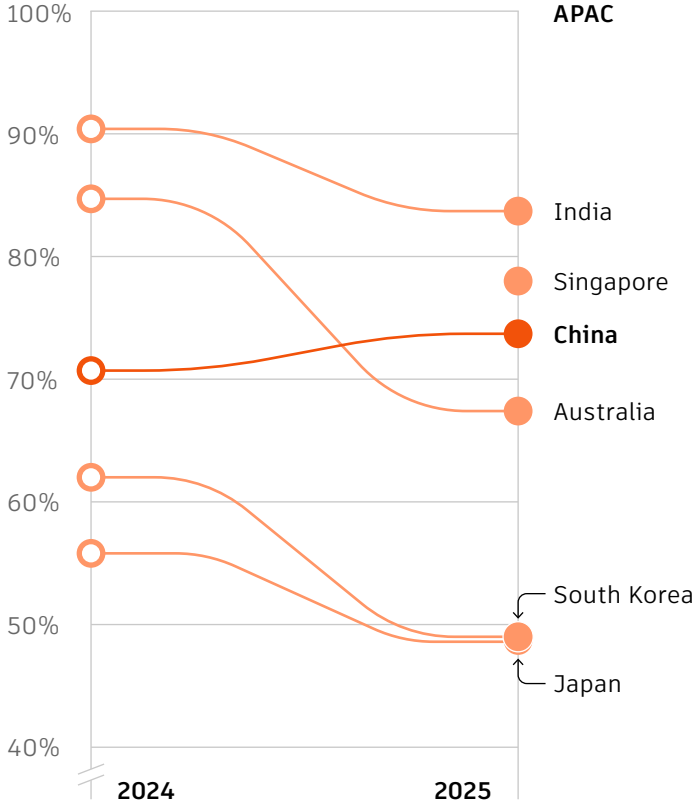
INSIGHT 8: APAC

"Korea is less optimistic. There are large-scale project-financing business divisions. But because of high interest rates, the project-financing businesses are not as active as in the past. And during the past three years, there was a market increase in raw material prices, including reinforced steel, concrete, and labor. These elements hamper the profitability of different initiatives and projects."

YONGSIK JEONG
Vice President, Sustainable Design Team, Samoo Architects & Engineers, a global architecture and engineering firm headquartered in South Korea

In contrast to the rest of the world, China has a greater percentage of leaders who say they will increase investment over the next three years. The APAC region generally saw steep year-over-year declines in the number of leaders who say organizational investments will increase or strongly increase. While China may be the only country where more leaders are saying they will be increasing their investments, India still leads the region, with 84% of leaders saying they will increase investments.

China is the only country increasing future investment



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. Data for Singapore was not gathered for the 2023 and 2024 surveys.

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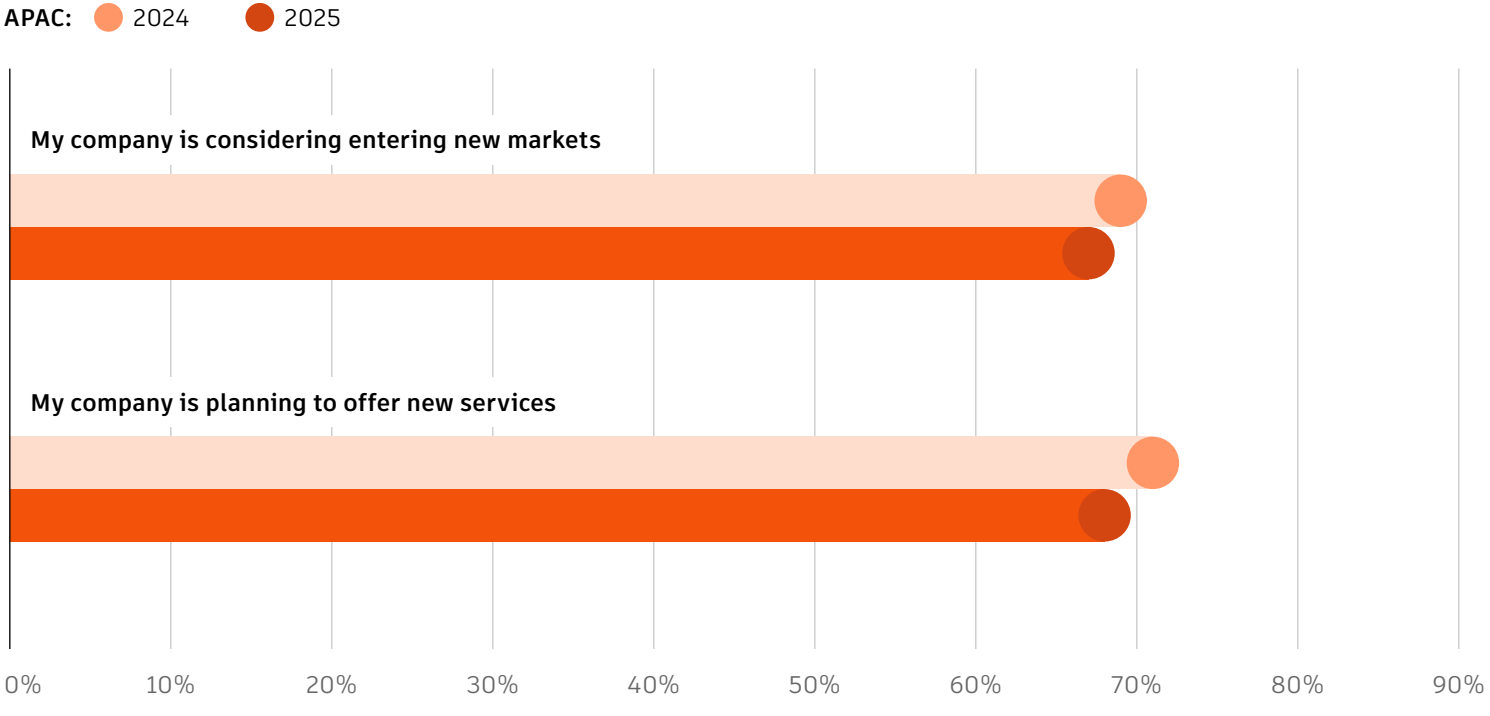
INSIGHT 8: APAC

Companies are pulling back on expansion efforts



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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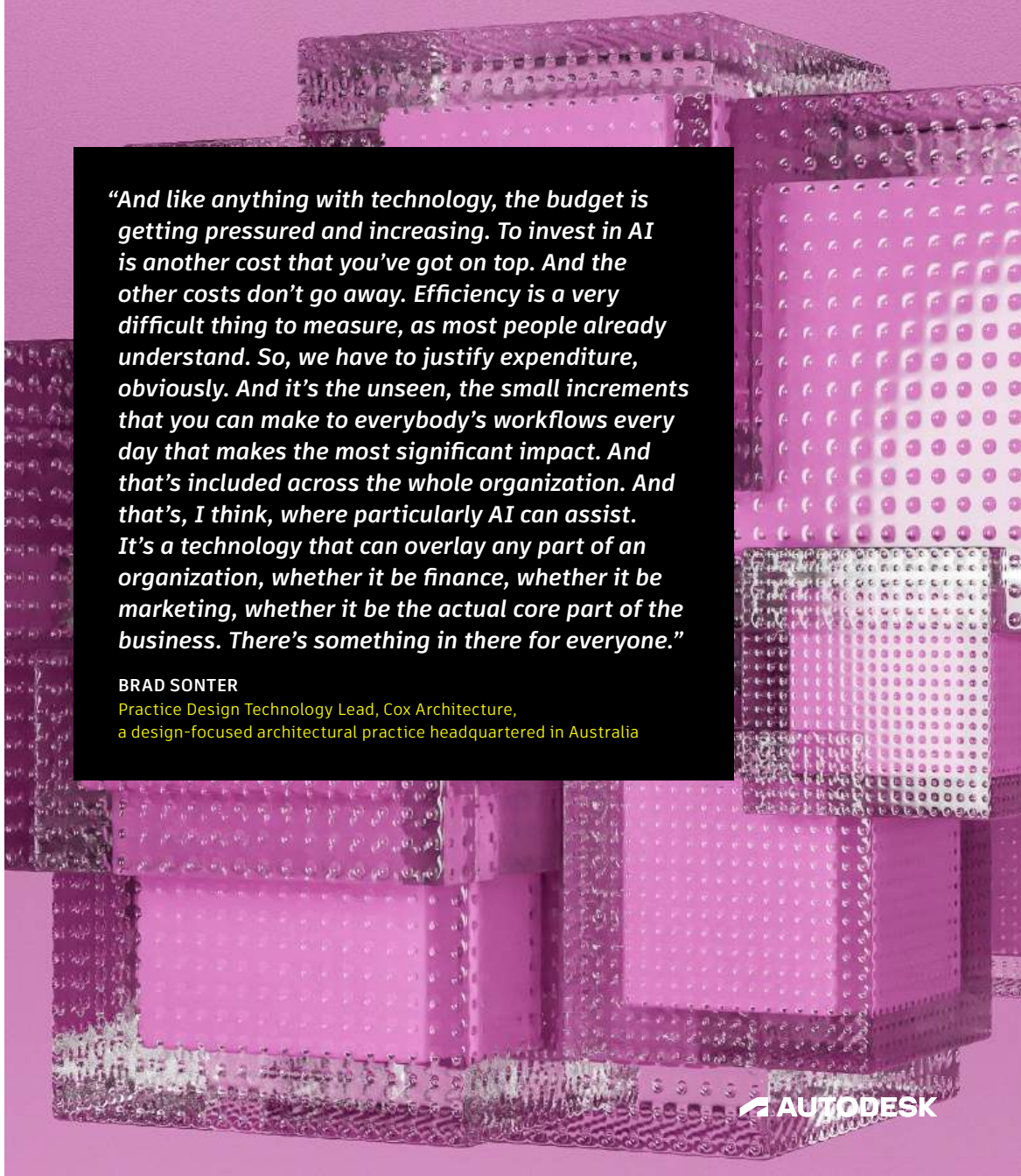
INSIGHT 8: APAC

Most APAC 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—67% say they will enter new markets this year, compared to 69% in 2024. Enthusiasm for offering new services is also down, with 68% of leaders this year saying they will offer new services compared to 71% last year.

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

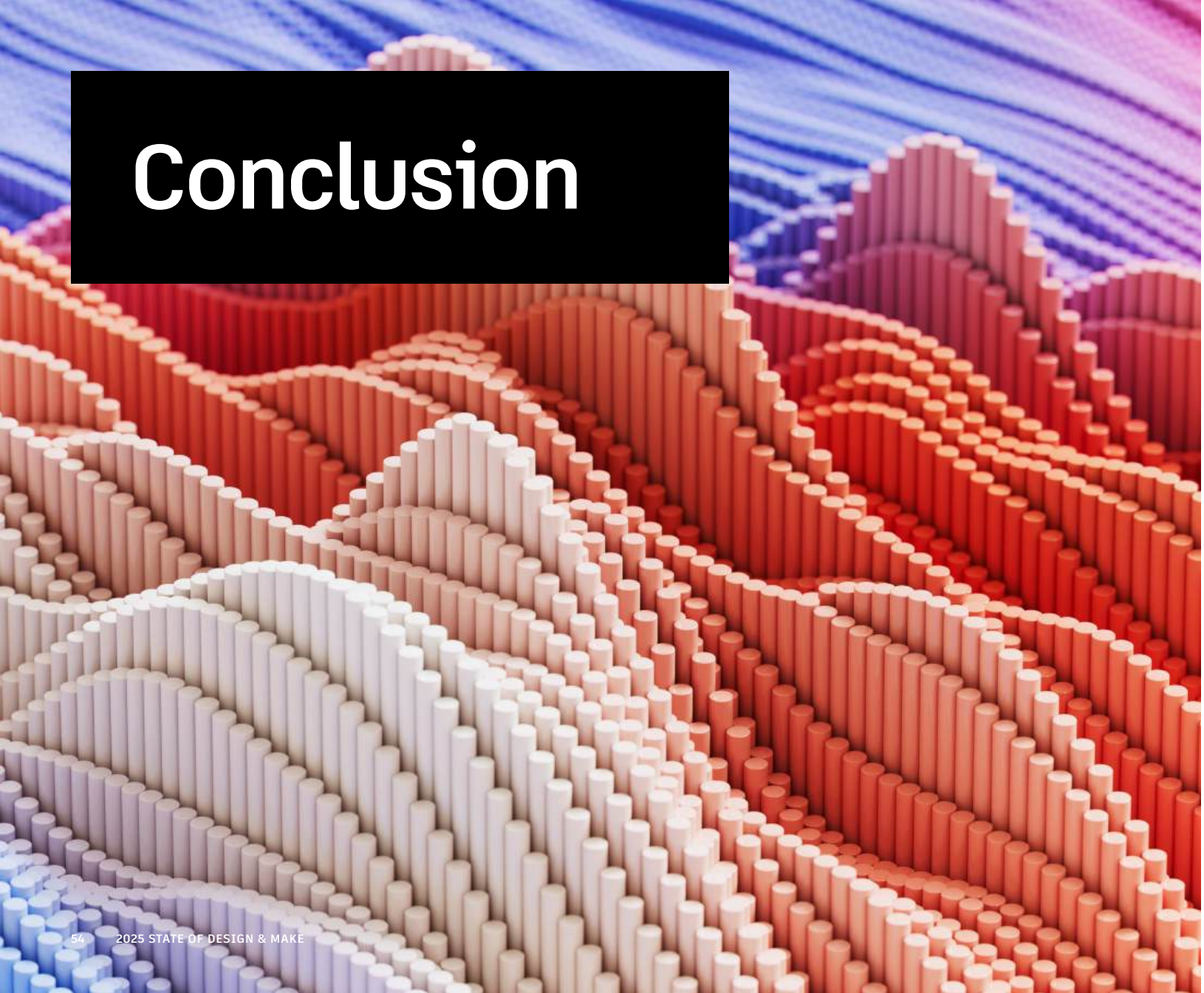
But as with so many aspects concerning Design and Make industries, digitally mature organizations are much less likely be affected by this general belt-tightening. In APAC, 78% of digitally mature companies say they are considering entering new markets, compared with 55% of less digitally mature companies. They are also more likely (80%) to offer new products and services than their counterparts (55%), and to increase their investments into acquisitions (68% compared to 39%). These actions give digitally mature organizations a competitive advantage, allowing them to expand while others contract under market pressures.



"And like anything with technology, the budget is getting pressured and increasing. To invest in AI is another cost that you've got on top. And the other costs don't go away. Efficiency is a very difficult thing to measure, as most people already understand. So, we have to justify expenditure, obviously. And it's the unseen, the small increments that you can make to everybody's workflows every day that makes the most significant impact. And that's included across the whole organization. And that's, I think, where particularly AI can assist. It's a technology that can overlay any part of an organization, whether it be finance, whether it be marketing, whether it be the actual core part of the business. There's something in there for everyone."

BRAD SONTER
Practice Design Technology Lead, Cox Architecture,
a design-focused architectural practice headquartered in Australia

Conclusion



Regardless of recent headwinds, leaders in APAC 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.

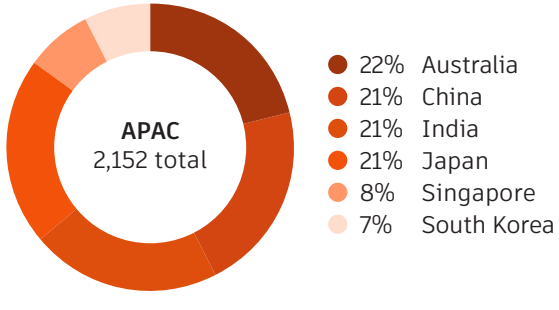
The quantitative data in this APAC subsample (n= 2152) was collected between May and August 2024 through a 20-minute online survey.[4] Autodesk partnered with Qualtrics for the collection of this data. In addition, 34 qualitative interviews with business leaders and futurists were conducted in October and November 2024.

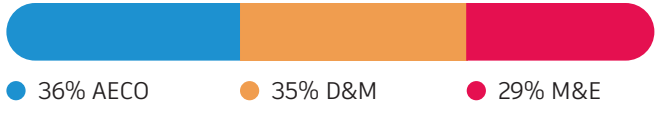
APAC survey sample:

2025:
2,152 APAC respondents

2024:
1,688APAC respondents

2023:
1,004 APAC respondents





71%
of survey participants are decision-makers in their companies

12 years
is the average time of experience in their industry

36%
of respondents said that they primarily use Autodesk Design and Make software

[4] *2025 State of Design & Make* questionnaire

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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 22% 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, 52% 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-one 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 29% 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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