

A 2027 State of **DESIGN&MAKE** breakout report

Architecture, engineering, and construction



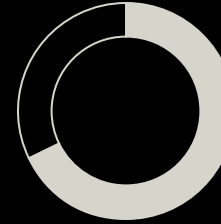
Adaptability is becoming AEC's competitive advantage

Architecture, engineering, and construction (AEC) shape the built world around us. Few industries have a greater influence on how people live and work—or face greater pressure to deliver more with fewer resources.

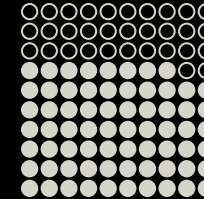
Data from the *2027 State of Design & Make* research shows that pressure is accelerating. Nearly seven in 10 AEC leaders say their industry has evolved more rapidly in the past three years than it did during the previous 25. AI, digital delivery, changing owner expectations, and growing demands for productivity are reshaping how projects are designed, delivered, and managed.

Organizations are responding in different ways. Priorities vary across architecture, engineering, and construction, but one finding is consistent: 69% of AEC leaders believe future growth depends on digital tools. At the same time, fewer now consider their organizations digitally mature than two years ago (43% vs. 49%), suggesting that expectations for digital capability are changing as quickly as the technology itself.

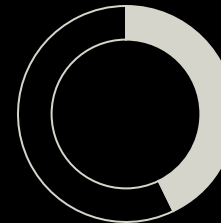
The organizations pulling ahead aren't adapting by accident. Research reveals the capabilities they are building to keep pace with change.

**68%**

say AEC has evolved more rapidly in the past three years than in the previous 25

**69%**

say future growth depends on digital tools

**43%**

say their organization is digitally mature

The pace of change depends on where you sit in the industry

While digital transformation is reshaping every part of AEC, organizations are responding based on the realities of their own business. Engineering firms place greater emphasis on AI and technology, while construction services continue to balance digital investment with persistent cost and workforce pressures. Those different priorities are reflected in

outcomes: 52% of construction services organizations report productivity improvements of at least 50% from digital transformation, compared with 72–73% of utilities and building owners. These findings suggest organizations across AEC are progressing at different rates as they respond to different business priorities and operating environments.

The differences matter, but so does what they have in common. Across every segment of AEC, leaders recognize that digital capability will play an increasingly important role in future competitiveness. The question is no longer whether the industry will transform, but how organizations will adapt as change continues to accelerate.

“In the built environment, we’ve operated more or less the same way for more than 100 years, with many incremental improvements rather than disruptive innovation. With the digital transition, on top of the energy transition and the environment, the speed of change is really increasing, so we are focusing much more on innovation.”

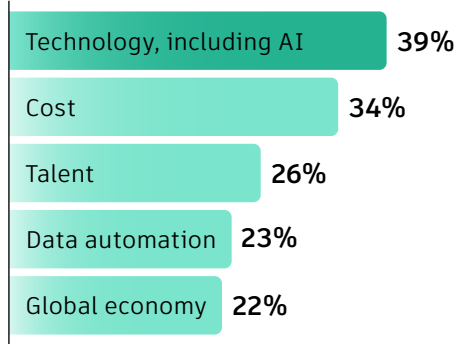
ISABELLE SPIEGEL

Vice President, Environment, VINCI, a global construction company based in Nanterre, France

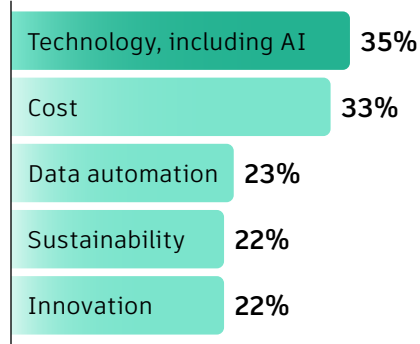
Tech and cost top the list of concerns for AEC leaders

Technology, including AI, is the top challenge for all but construction

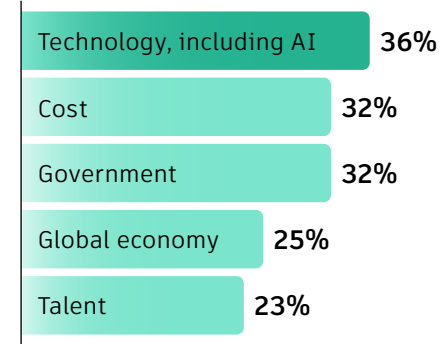
Overall



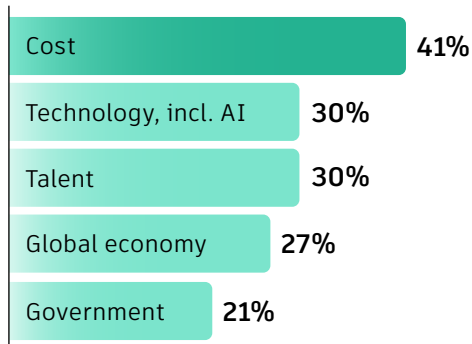
Architecture services



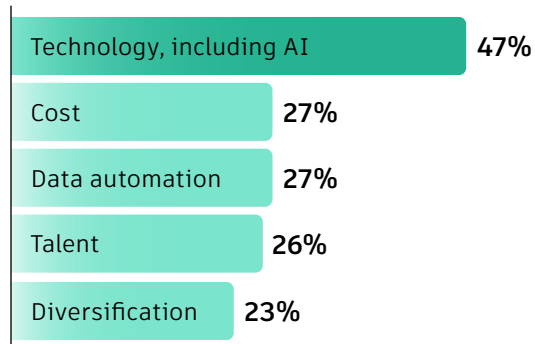
Building owners



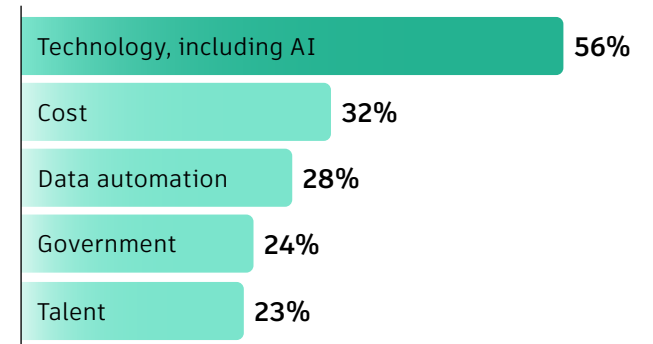
Construction services



Engineering service providers



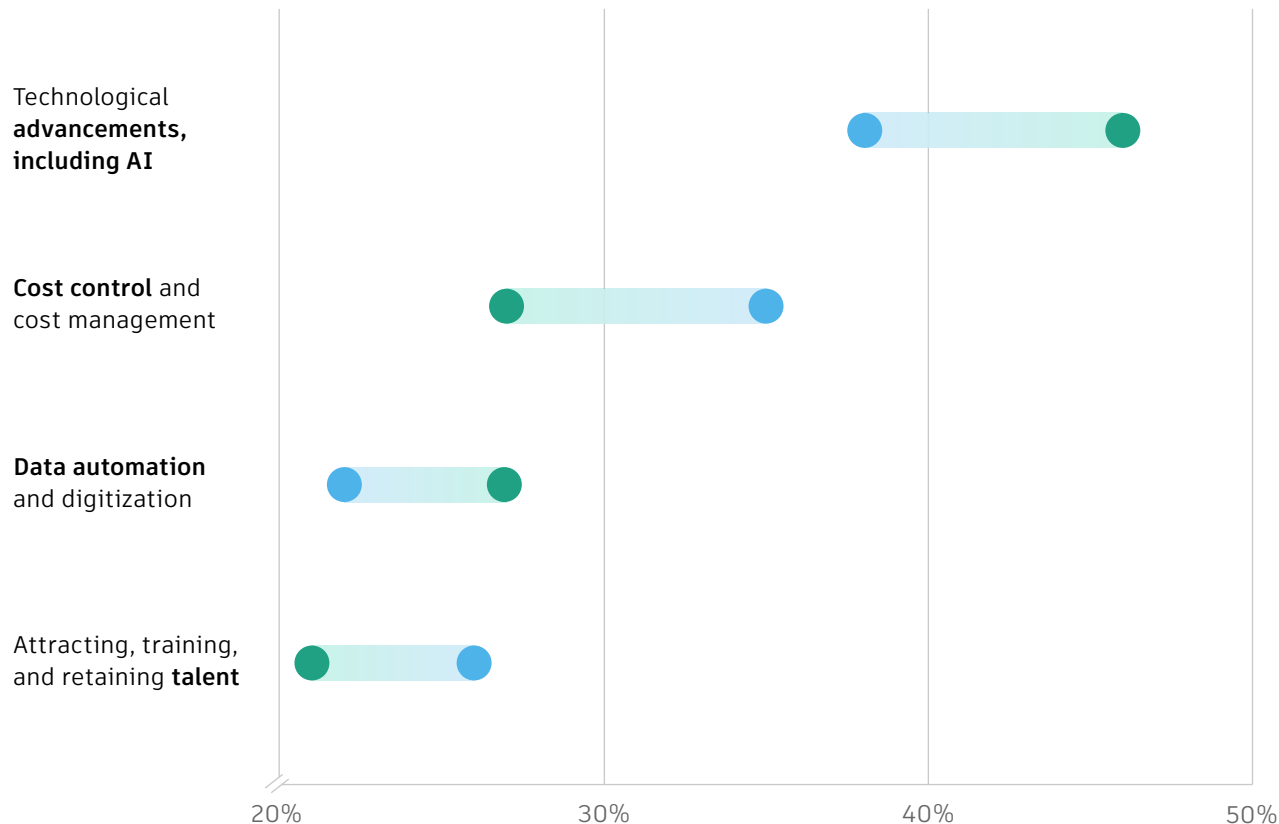
Utilities and telecom



Survey question: What are the top three challenges your company or organization faces today? Please select up to three. Percent selected. 13 response options.

AEC Pacesetters are challenged by AI, less by costs

● Pacesetters ● Mainstream



Survey question: What are the top three challenges your company or organization faces today? Please select up to three.
Percent selected. 13 response options. See the Pacesetter definition on page 5.

While organizations across AEC face many of the same external pressures, the highest-performing organizations are preparing for the future differently.

Compared with mainstream organizations, **Pacesetters** are significantly more likely to prioritize AI and data automation, while placing less emphasis on immediate operational constraints. Rather than reacting to change, they're investing in the capabilities needed to navigate it.

What are Pacesetters?

Pacesetters are the 11% of organizations in our study that lead simultaneously in digital maturity, AI adoption, and sustainability. They outperform their peers in both business performance and preparedness for future challenges. For details on the methodology, see the *2027 State of Design & Make* report.

Digital transformation is reshaping project delivery

Across AEC, digital transformation is delivering measurable business value. Roughly two-thirds of leaders report considerable improvements in customer satisfaction (66%), innovation (65%), and productivity (63%) over the past three years, suggesting that digital tools are becoming part of everyday project delivery rather than isolated technology initiatives.

The biggest shift may be in how organizations think about what they're delivering. As owners seek more standardized, connected, and data-rich assets, digital capabilities are becoming essential not only during design and construction, but throughout an asset's lifecycle. Organizations that connect people, data, and workflows are better positioned to meet those expectations while improving project outcomes.





“We’re seeing owners increasingly view their building portfolios as standardized, repeatable assets rather than one-off projects. For example, data center developers want facilities that are modularized and productized, enabling them to replicate the same or similar building across multiple locations instead of designing each one from scratch. This reflects a broader shift from a project delivery mindset to a product-delivery mindset.”

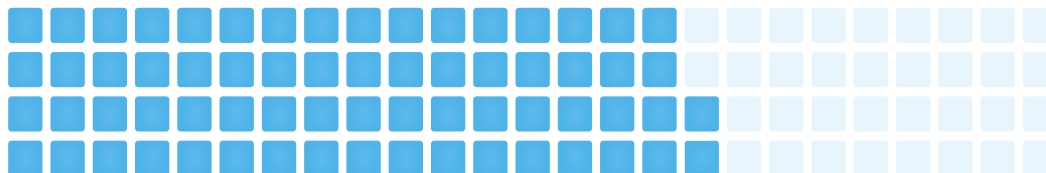
RAY BOFF

Prefab Leader, DPR, a construction services company based in Santa Clara, CA

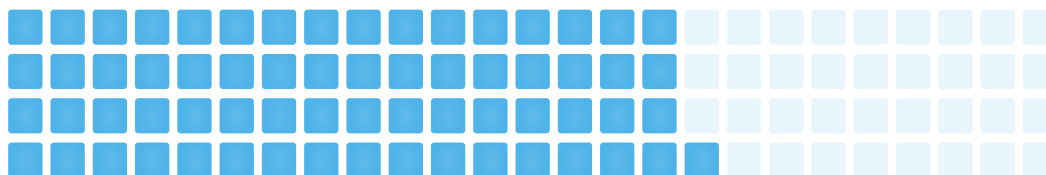
Digital transformation continues to pay dividends across AEC organizations

2/3 of leaders say digital transformation has improved customer satisfaction and innovation by at least 50%

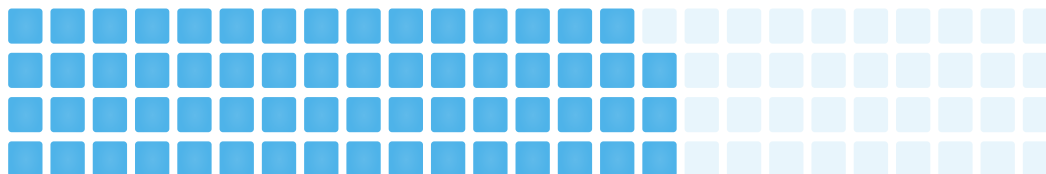
Customer satisfaction **66%**



Innovation **65%**

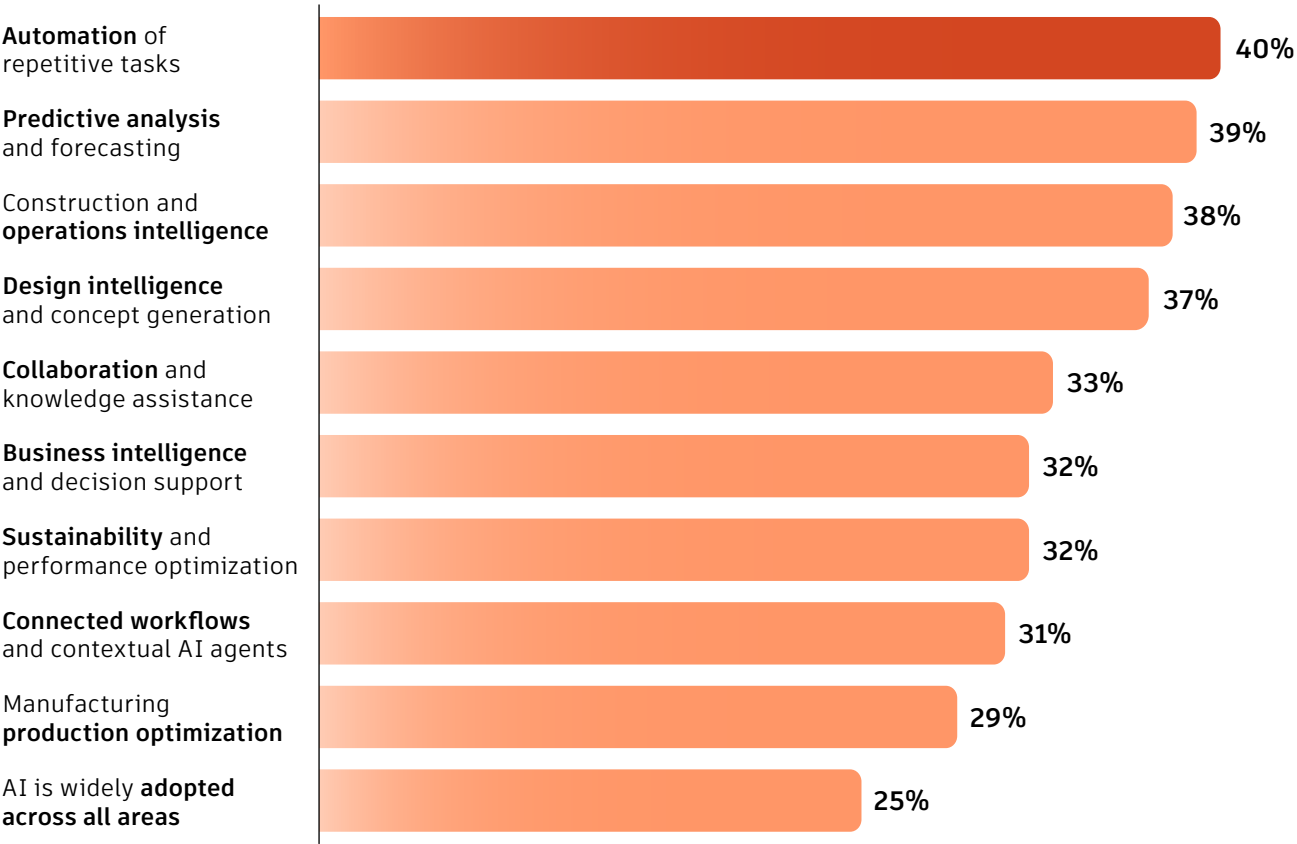


Productivity **63%**



Survey question: We identified the following as top benefits of digital transformation. In the past three years, how much has digital transformation improved [benefit]? 6-point scale, top 3 = “considerably, by 50%,” “significantly, by 75%,” or “drastically, by 100%.” Percent selected.

AI application in AEC is concentrated in operational and project-delivery workflows



Survey question: What are the current use cases for artificial intelligence (AI) in your company or organization? Please select all that apply. Percent selected. Note: Some answer options are shortened for better readability. "Other" and "none of the above" are not shown.

AI is moving beyond experimentation to become a practical tool across the AEC project lifecycle. Organizations are using it to automate repetitive work, improve forecasting, support construction and operational intelligence, and help teams make faster, better-informed decisions. Increasingly, AI is being integrated into the workflows that connect design and construction.

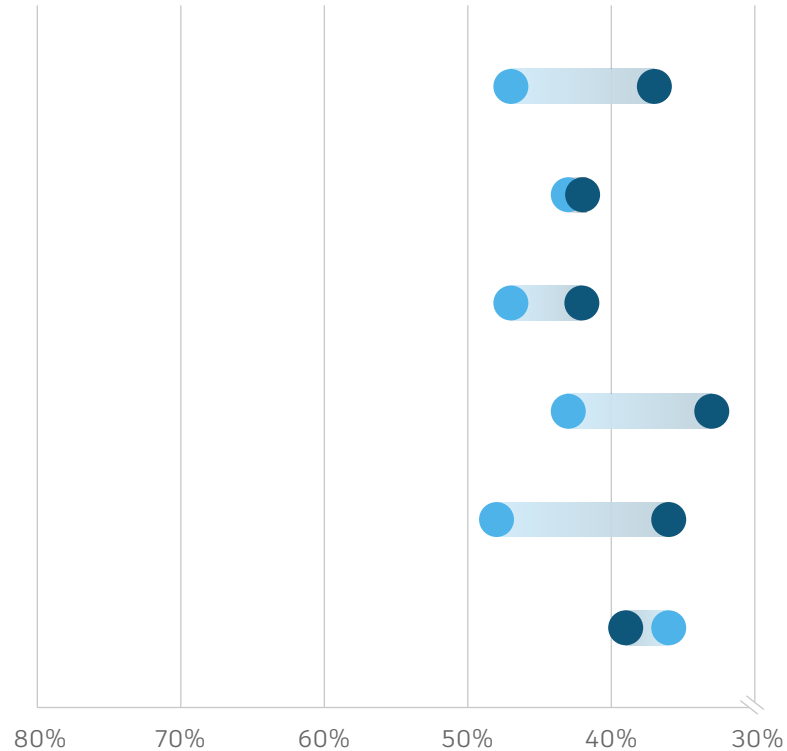
As adoption grows, confidence is growing with it. Trust in AI has increased across AEC over the past year, while concern that it will disrupt the industry has declined. At the same time, AI is helping organizations deliver the data-rich assets that owners increasingly expect, reinforcing its role as part of a broader digital transformation rather than a stand-alone technology initiative.

69%
of AEC companies trust AI technologies

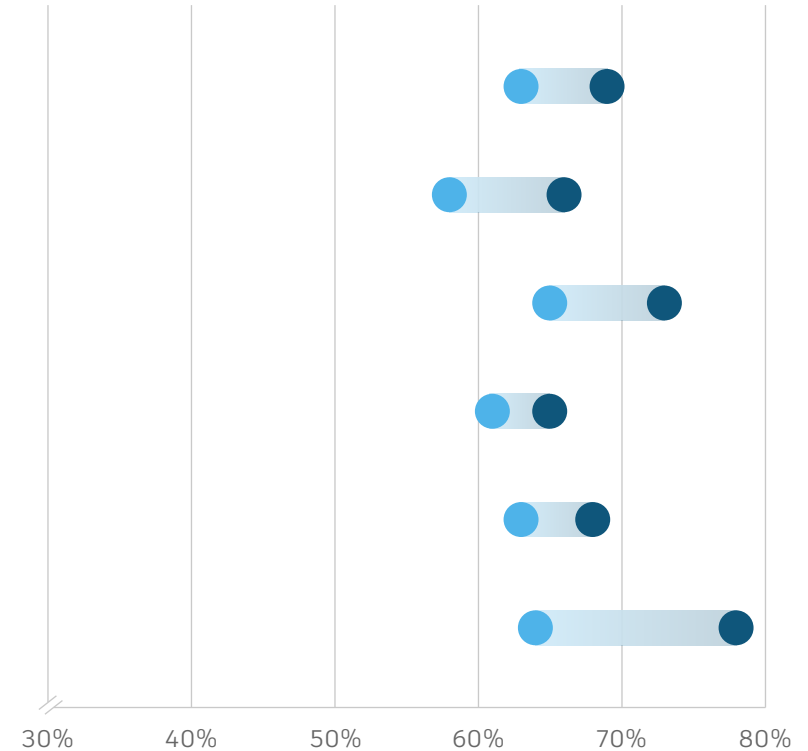
AI concern is easing while trust is rising across all AEC industries

● 2025 ● 2027

AI will **destabilize** my industry



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: 1. I trust AI technologies for my industry. 2. AI will destabilize my industry. 5-point scale. Top two: "somewhat agree" or "strongly agree."

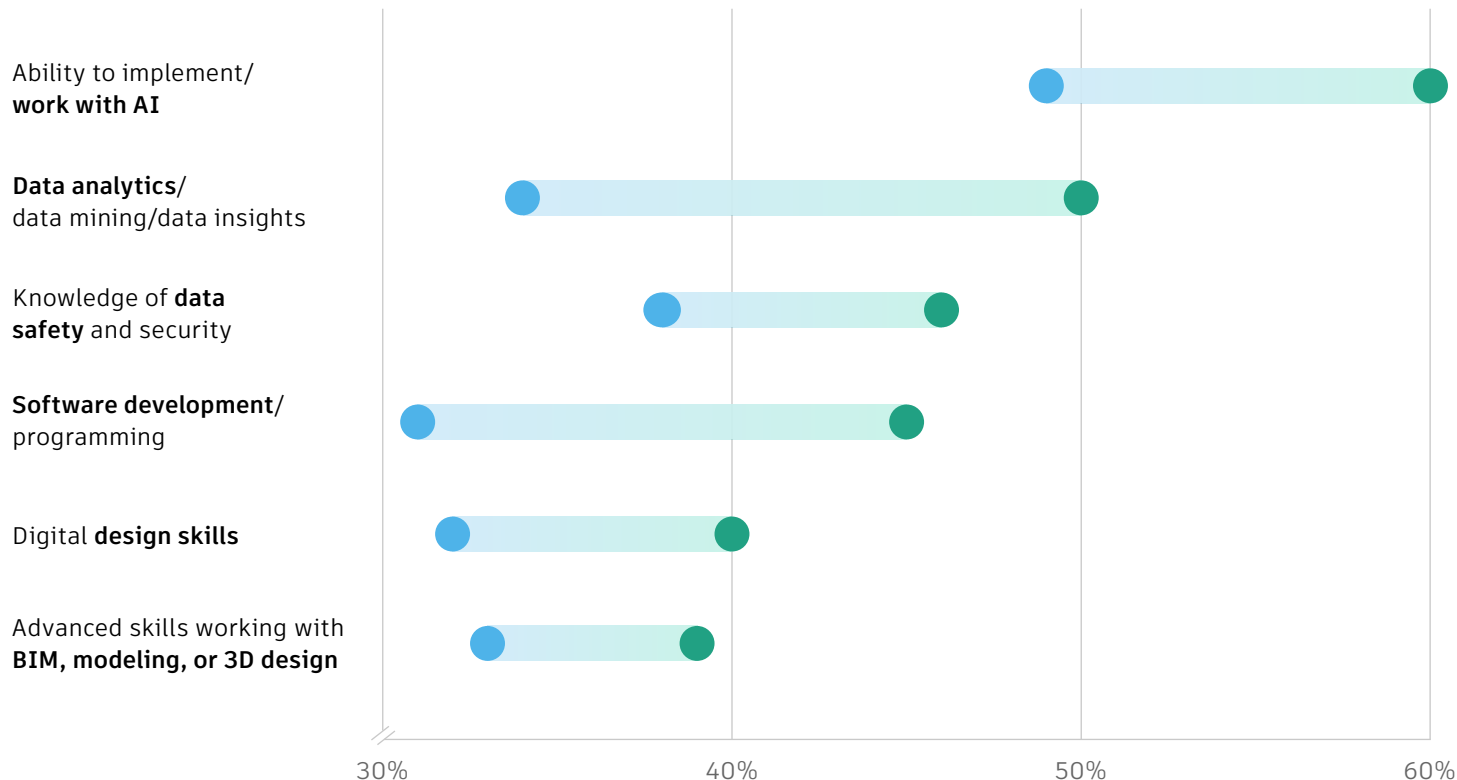
Technology is evolving quickly, and organizations succeed by helping their people evolve with it. With the industry changing more in the past three years than in the previous 25, organizations are reshaping how they hire, develop, and support their teams.

AI skills are now the most sought-after technical capability in AEC, followed by data security, data analytics, and BIM and 3D design expertise. Pacesetters build on that foundation by prioritizing a broader digital skill set—including data analytics, software development, and digital design—suggesting they view digital capability as a portfolio of complementary skills rather than any single area of expertise. At the same time, 68% of leaders say sustainability helps attract and retain talent, reinforcing that the organizations best positioned for long-term success are investing in both digital capability and the people who can apply it.

AEC's digital hiring stack runs deeper among Pacesetters

Across AEC, AI is a shared hiring priority

● Pacesetters ● Mainstream



Survey question: What technical or digital skills are your company or organization currently prioritizing when hiring? Please select all that apply. Percent selected, multiple responses allowed. See the Pacesetter definition on page 5.



Conclusion

AEC is entering a new era defined not by a single technology, but by the ability to adapt. As AI, digital delivery, and owner expectations continue to evolve, organizations that build connected capabilities will be better positioned to respond to whatever comes next.

The organizations we call Pacesetters offer a glimpse of what that looks like in practice. Compared with mainstream organizations, they are more likely to believe future growth depends on digital tools (90% vs. 67%), integrate AI into everyday workflows (60% vs. 40%), invest in AI training

(56% vs. 40%), and prioritize AI (60% vs. 49%) and data analytics (50% vs. 34%) when hiring. These organizations aren't simply adopting new technologies—they're building the capabilities needed to use them effectively.

For AEC leaders, that's the larger takeaway from this research. Success won't be defined by any single investment in AI or digital transformation, but by creating organizations that can continue learning, adapting, and delivering value as the industry evolves.

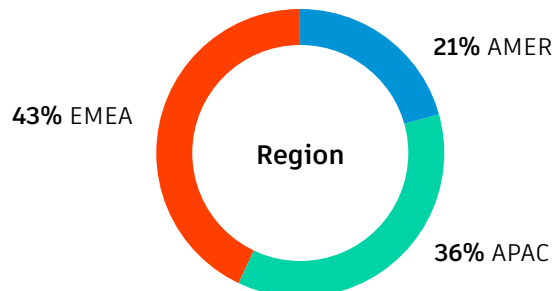
About this analysis

This AEC industry briefing draws from Autodesk's 2027 *State of Design & Make* study, which surveyed 2,056 leaders and experts across architecture, engineering, construction, utilities, and related industries. The findings presented here highlight patterns specific to the AEC sector and should be interpreted within the context of this industry sample. Pacesetters represent 11% of AEC respondents (n=227), with the remaining 89% classified as mainstream organizations.

Definitions for Pacesetters, digital maturity, AI leaders, and sustainability leaders are consistent with those used in the 2027 State of Design & Make report. 2026 AI Pulse comparisons are cited where trend data is referenced throughout this briefing.

AEC respondent profile

31%	Construction services
20%	Engineering
14%	Architecture
13%	Utilities & telecom
9%	Building owners
6%	Civil infrastructure
6%	Oil & gas
1%	Mining



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