MODENA

Architecture | Engineering | Construction | Infrastructure

2025 STATE OF DESIGN & MAKE

SPOTLIGHT ON CONSTRUCTION

Global insights on resilience, digital maturity, and the future of building.

Data drawn from a survey of 3,503 leaders and experts across 27 countries.

Optimism Persists Despite Heavy Headwinds

The Pressure

55% concerned about raw material costs

55% concerned about higher labor costs

53% concerned about supply chain delays

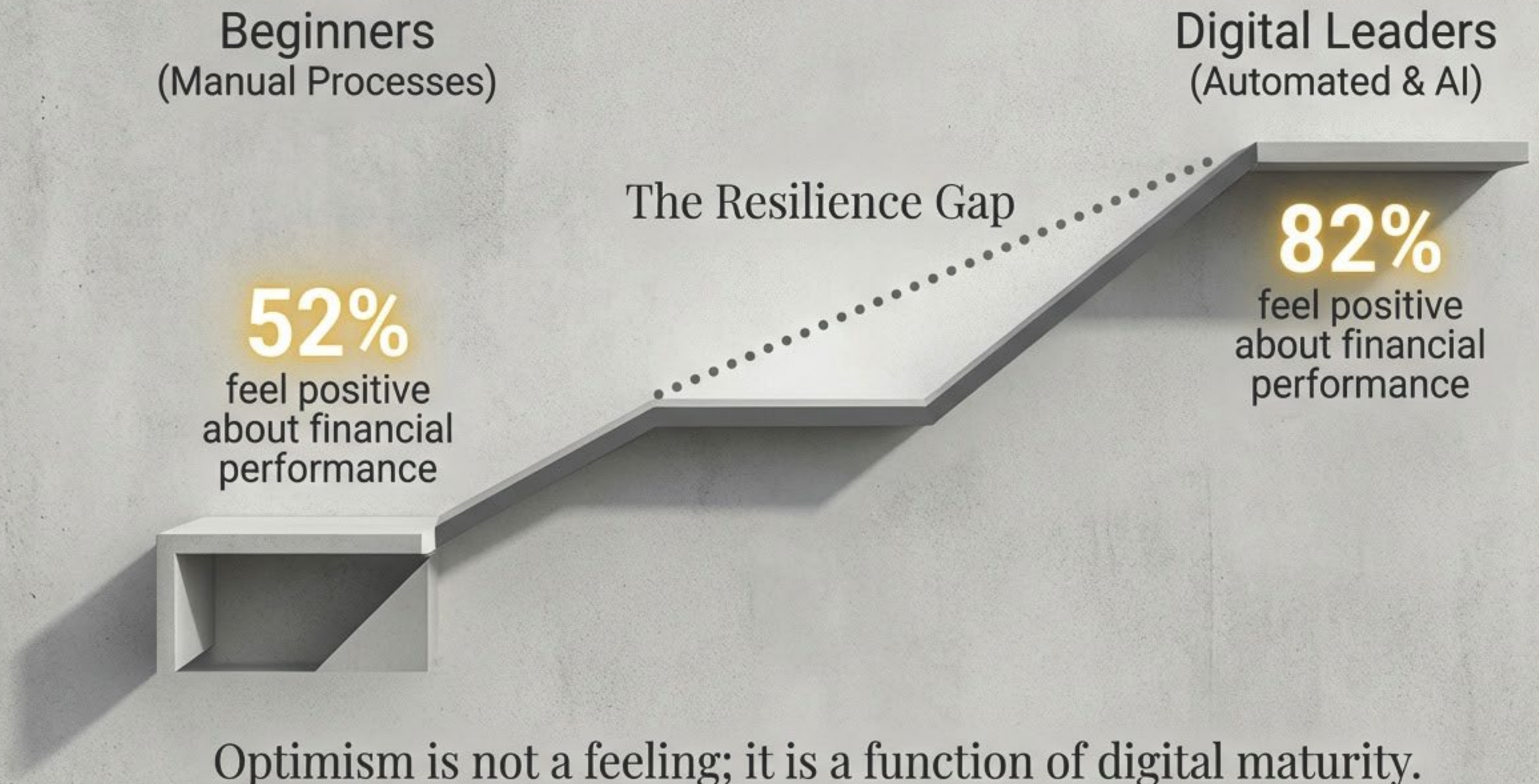
The Outlook

62%

of leaders feel positive about the future of the industry.

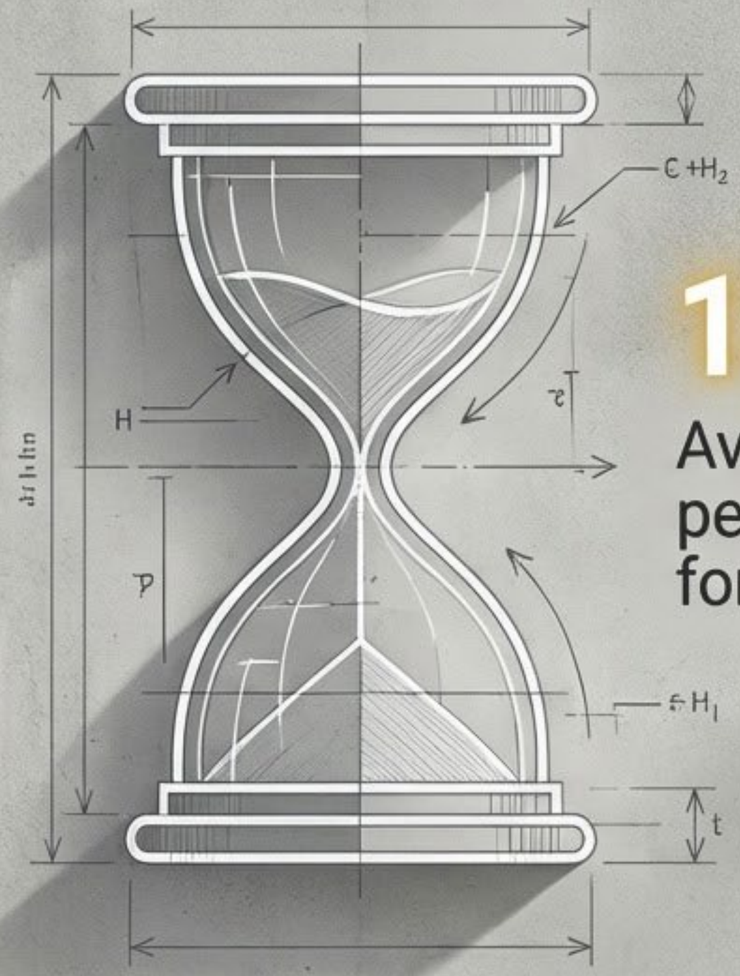
The industry is besieged by economic and operational challenges, yet the majority believe in a profitable future.

Preparation Dictates Sentiment



Optimism is not a feeling; it is a function of digital maturity.

The High Cost of Disconnected Data



13 Hours

Average time spent per week just *looking* for project data.

The #1 Tool:

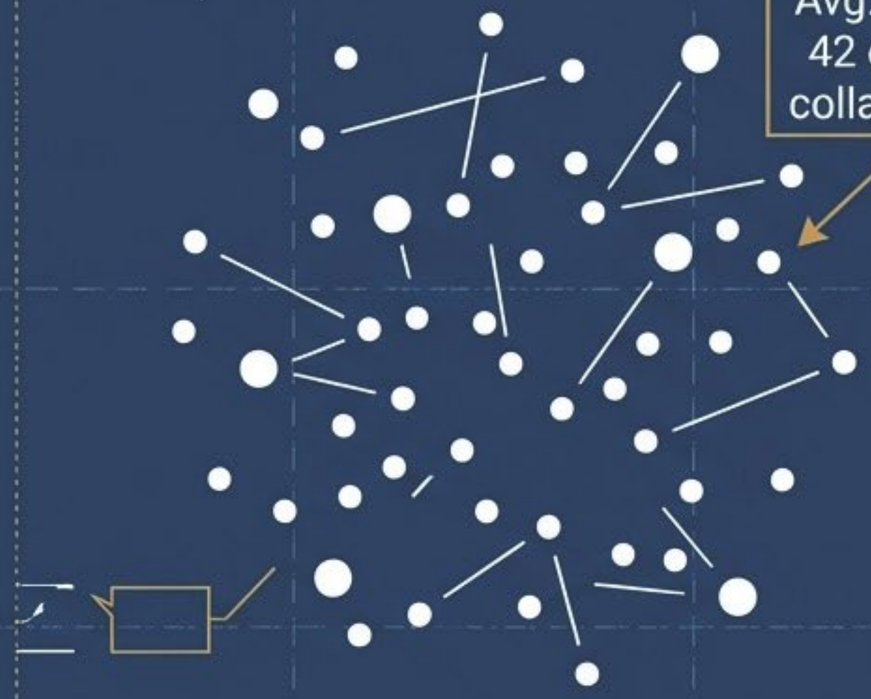
Spreadsheets (35%)

Still outpacing specialized software.

The Leadership Advantage: Digital leaders spend 2 hours less per week searching—reclaiming 5% of their time for high-value work.

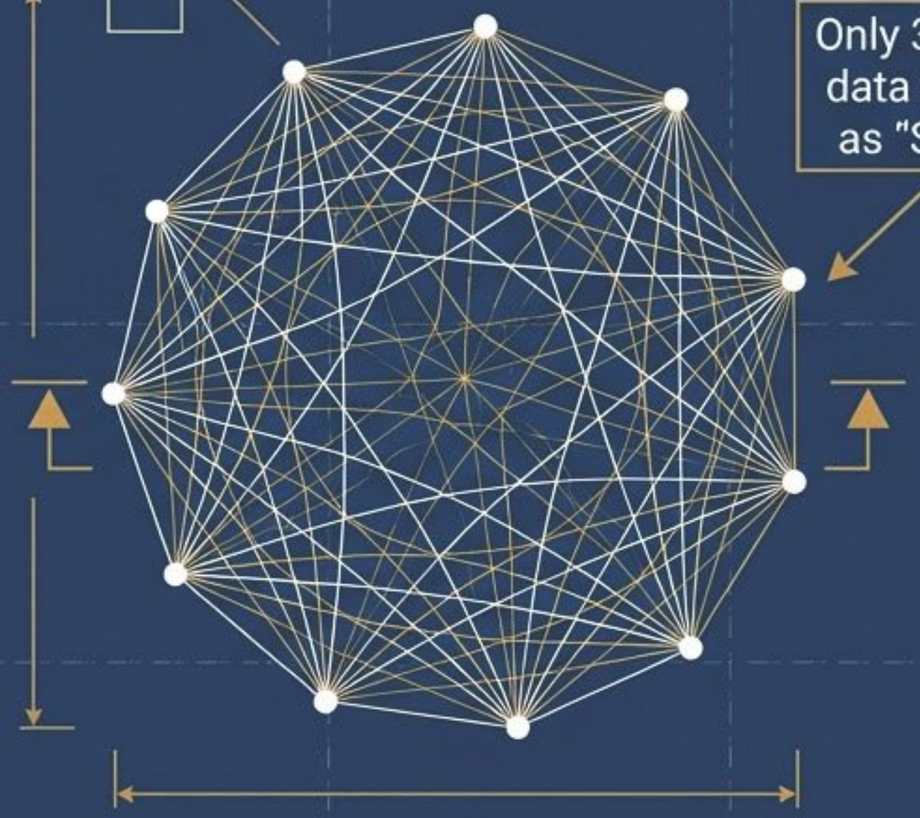
Collaboration Without Connection is Risk

Siloed Teams



Avg. Project: 42 external collaborators

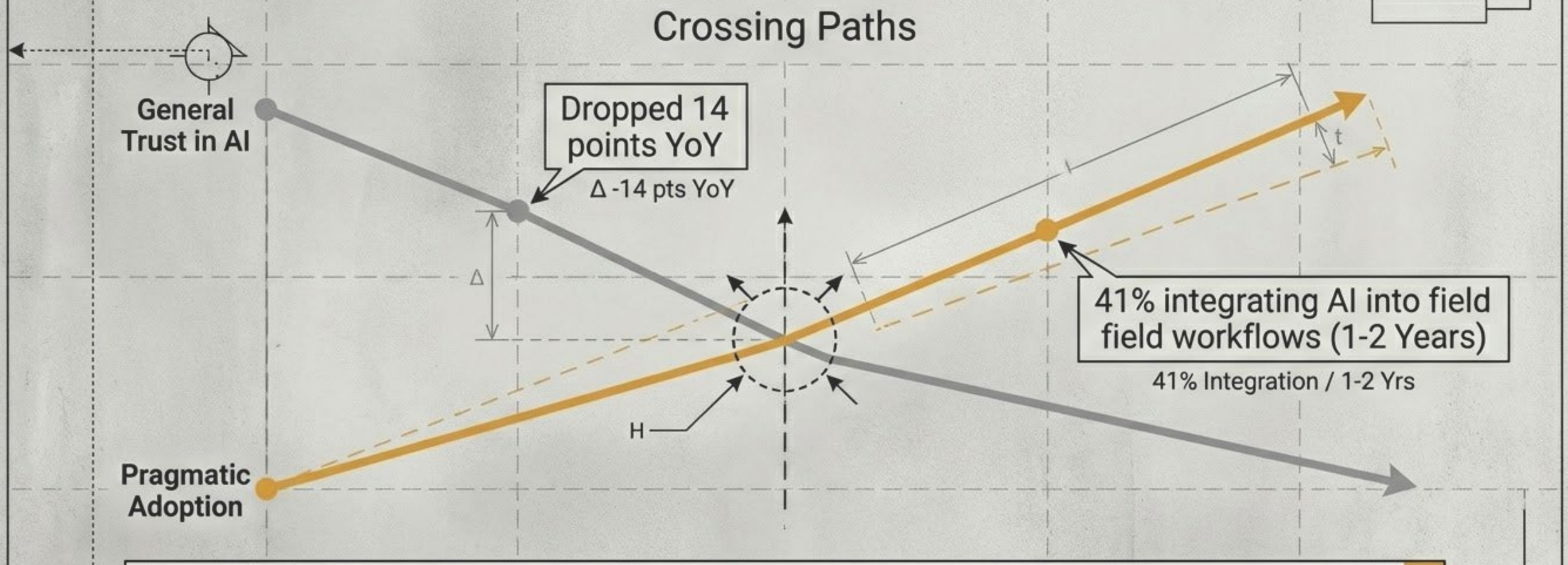
Connected Data



Only 38% rate data sharing as "Strong"

Poor data sharing correlates with higher concern regarding lost bids and rework.

AI Moves from Hype to Implementation



Key Insight:
Skepticism is healthy, but early adopters are moving past 'trust' to concrete 'utility'.

Solving the Back-Office Bottleneck

Building Lifecycle

The Now (1-2 Years) → **The Future** (5+ Years)

- Cost Management
- Estimating
- Document Management

- Field Collaboration
- Autonomous Bidding

89%

of leaders report late payments as a persistent issue—a prime target for AI automation.

The Workforce is Aging Out

63%

Concerned about aging workforce

53%

Cite lack of skilled workers as major barrier

"We are losing institutional knowledge faster than we can replace it."

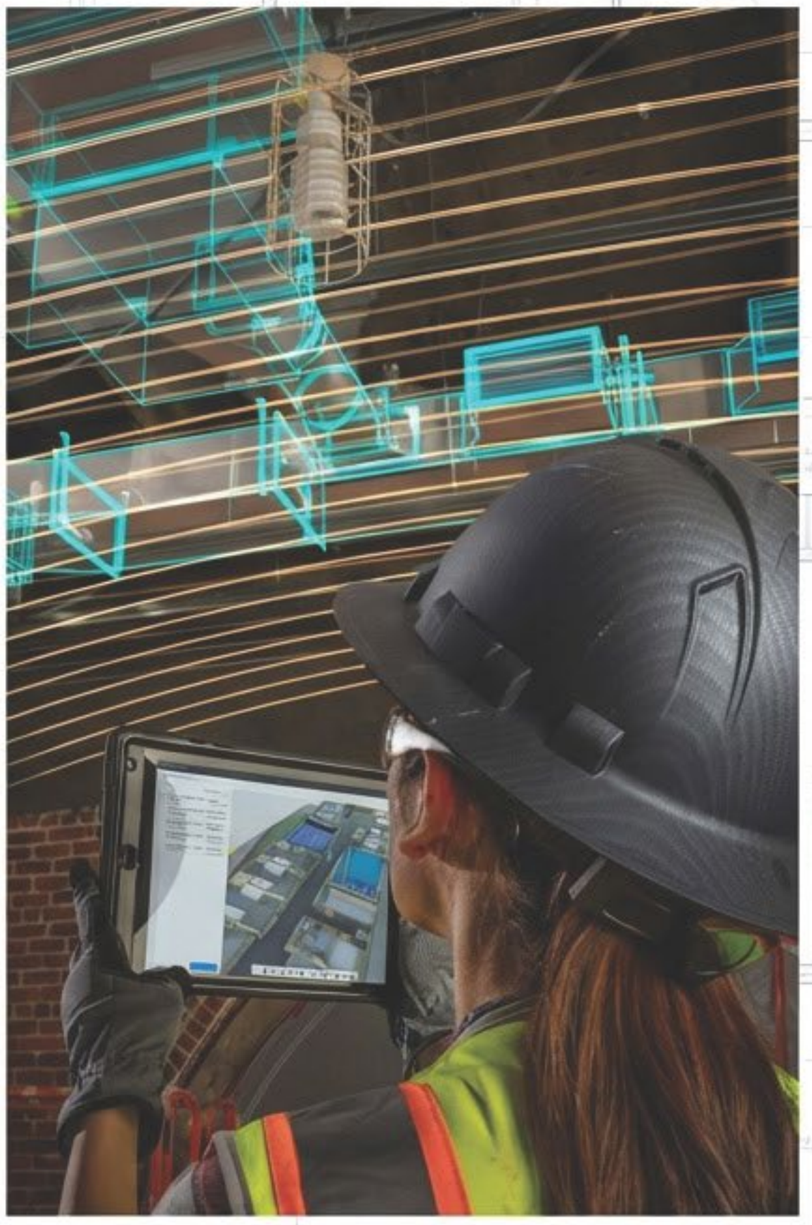
Tech is the Bridge to the Next Generation

65%

agree construction is attractive to the emerging workforce.

Recruitment Strategy: Active Measures

Takeaway: Modern tools signal a modern workplace to young recruits.



The Imperative to Upskill

The Ambition

64%
are implementing continuous learning programs.

The Hurdle

44%
lack resources to design training (Up 10pts YoY).

“For us, it’s not just about hiring talent... we’re also building a culture of upskilling.”
— Emilia Zybek-Tsatsiashvili, Sweco

Sustainability is a Data Challenge

AI

is the #1 Enabler for sustainability.

67%

of Digital Leaders use AI to drive sustainable outcomes.

69%

believe sustainability measures can generate >5% annual revenue.

Digital Maturity Predicts Success

+19%

Win Rate Advantage

Digital leaders are 19% more likely to have a bid win rate above 60% compared to emerging companies. (And 37% more likely than beginners).

The gap between the tech-advanced and the manual-reliant is widening into a performance chasm.

The 2025 Outlook: 4 Key Takeaways

Mindset

Optimism is high (**62%**), but strict correlation to tech maturity.

Efficiency

Data friction costs **13 hours/week**. **AI** is shifting from “experiment” to “essential” for back-office tasks.

Talent

The skills gap is severe; **tech** is the primary recruitment tool for the next generation.

Sustainability

No longer just compliance; a **revenue driver** enabled by **AI** data analysis.

The Future is Built by the Prepared

"What excites me most… is the increasing openness to adopting digital workflows. A new generation of builders is entering the workforce… and this shift will fundamentally transforrm how we build." – Hannu Lindberg, DPR Construction

ASSESS MATURITY. | INVEST IN TALENT. | TRUST THE DATA.

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