




Digital Maturity Index Survey 2025

Enabling business growth through digitalization

Germany | March 2025



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Key findings and overview



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01 Key findings and overview

Survey participants 2025

Our participants represent the breadth of the manufacturing industry holding middle management or top management positions.

This year’s survey focuses on two representative countries as some of the most important global economies.



593
participants



44%
CxO level

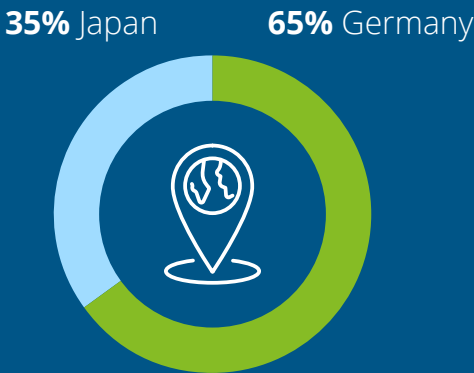


7th
annual survey

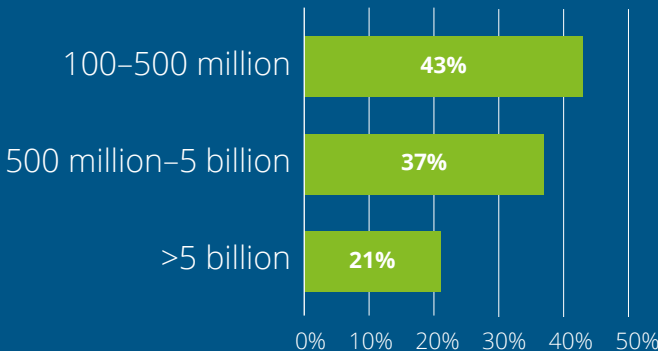


6-year
passage of time
to focus on

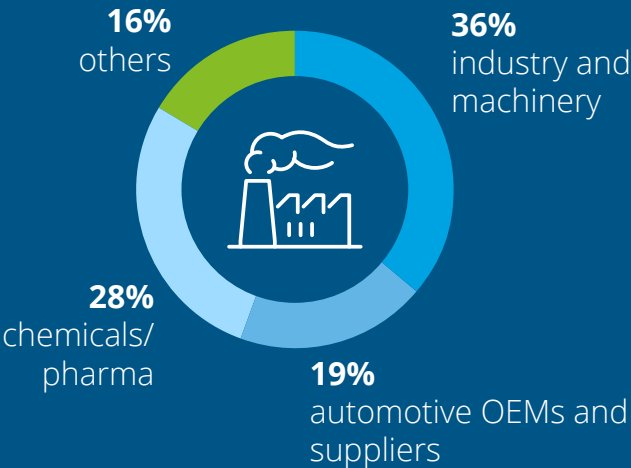
Participants by country



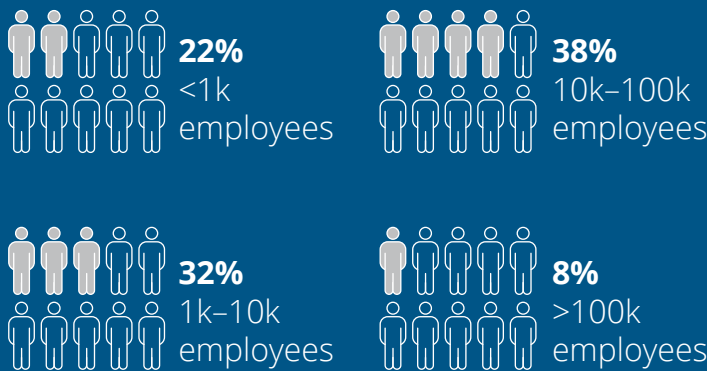
Participants by revenue in EUR



Participants by sector



Participants by no. of employees



01 Key findings and overview

Key results | Germany

386

participants at C-level and
BU head level

4

Industry clusters with focus
on industrial products and
automotive

17%

of revenue invested in
digitalization on average

51%

have developed a digital
mindset among the workforce

27%

work in ecosystems with an
overarching value creation
structure

81%

of companies develop new
customer solutions and
business models during
digitalization

This year's survey builds on the very first one conducted in 2019 and analyzes **how companies are shaping their digital future** against the backdrop of multiple crises. It covers the latest insights from **593 company leaders across different sectors in manufacturing:**



German companies have **increased their digital maturity** by an average of 11% in the last six years.



As digitalization advances, companies are making great efforts to build ecosystems because they expect to gain value from them (+49% vs. 2019).

Digital champions collaborate more and achieve higher EBIT uplifts than the average.



However, satisfaction rates regarding digitalization are lower than two years ago (-2% vs. 2023), **highlighting the need for efficiency gains and continuous learning (AI).**



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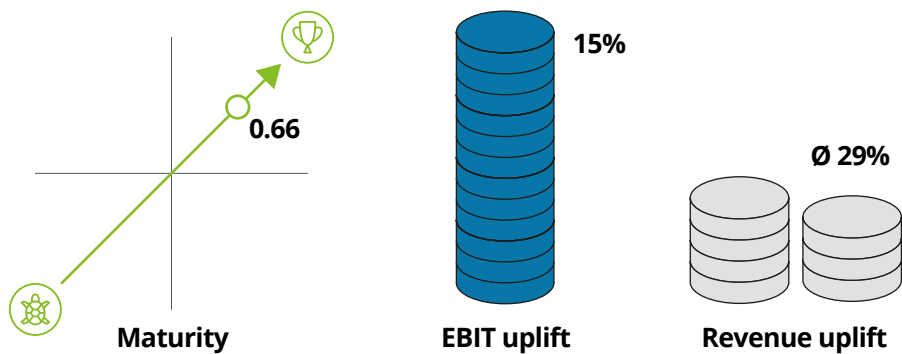
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01 Key findings and overview

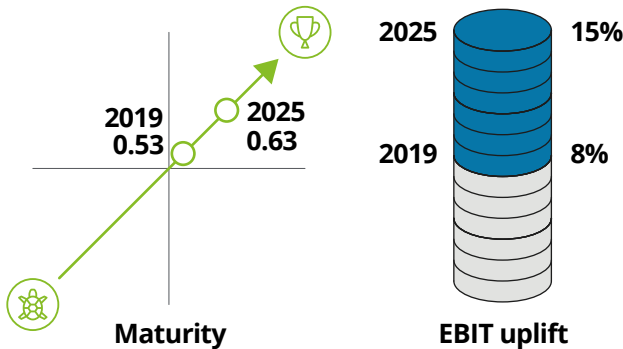
Key figures and industry progress in Germany

Average across industries in 2025



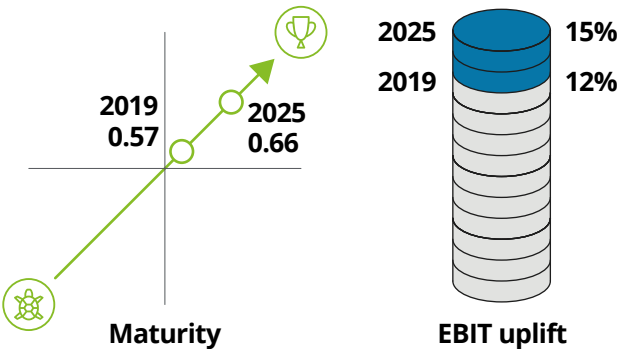
Automotive industry

Starting from the weakest position in 2019, the automotive industry has made the biggest leap forward in terms of EBIT in the last six years; however, it is still struggling to fully embrace the digital progress.



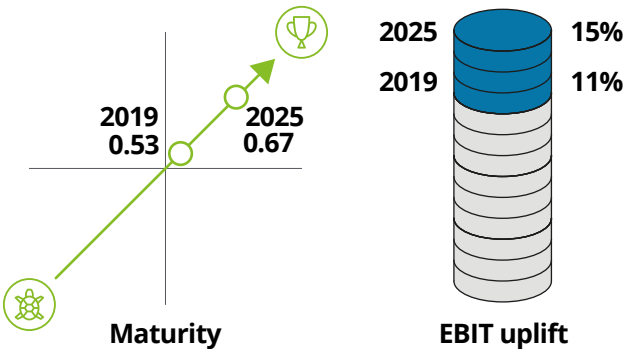
Industrial products

Starting from a stronger maturity and EBIT position, the current crises in the industrial sector show that increases have been slightly weaker despite consistent digitalization initiatives.



Chemicals and pharma

Showing slightly stronger numbers in 2025 than the other industry clusters, chemicals and pharma are showing considerable progress in terms of digital maturity as well as strong EBIT performance as well.



01 Key findings and overview

Background and methodology of the survey

Deloitte performs an annual analysis of the degree of digitalization in the German and global manufacturing industry as part of an expert survey. Our Digital Maturity Index (DMI) – jointly developed by Deloitte and the University of Duisburg-Essen – marks the starting point of your digital transformation.

The Deloitte's DMI is the result of a standardized approach to derive a digital maturity level as well as possible fields of action on your path to a digital business model.

The basis of this study is made up of more than 90 different operational and strategic parameters resulting in six digital archetypes – from Digital Laggards to Digital Champions – characterized by different digitalization approaches.

This year's study builds on the very first survey from 2019 and analyzes the overall progress of leading companies against the backdrop of the multiple global crises differently affecting the markets under review, and how the multiple initiatives are having an overarching impact on the health status of the businesses.



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01 Key findings and overview

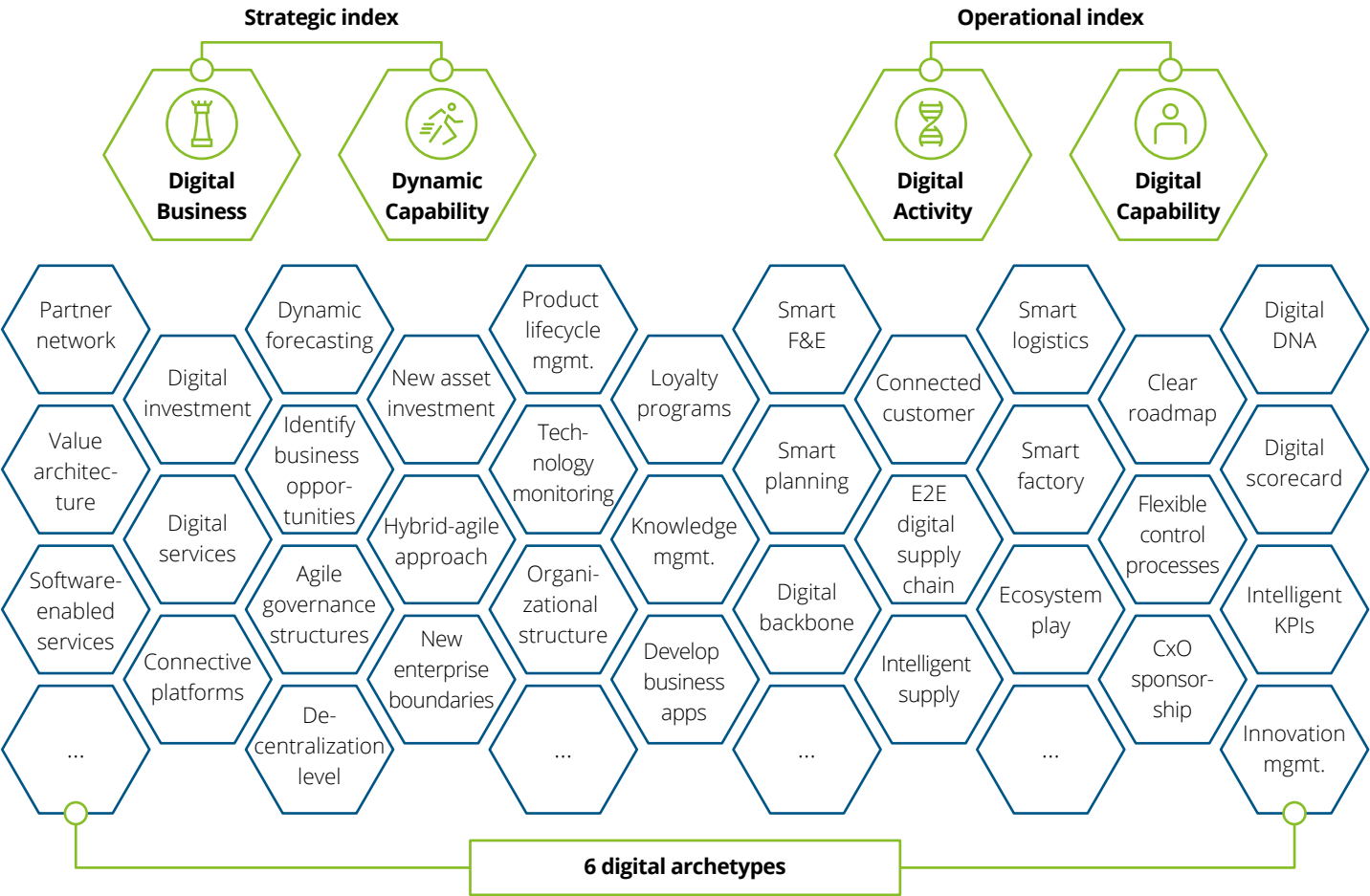
Digital key capabilities and parameters determine maturity

Our Digital Maturity Index considers four holistic indices:

“Digital Business”, “Dynamic Capability”, “Digital Activity”, and “Digital Capability” to analyze the status quo of a digital journey covering more than 90 different operational and strategic parameters.

Based on these parameters we have defined six different digital archetypes and allocated companies to them based on their overall digital journey and performance.

Fig. 1 – Dimensions and parameters considered for the DMI



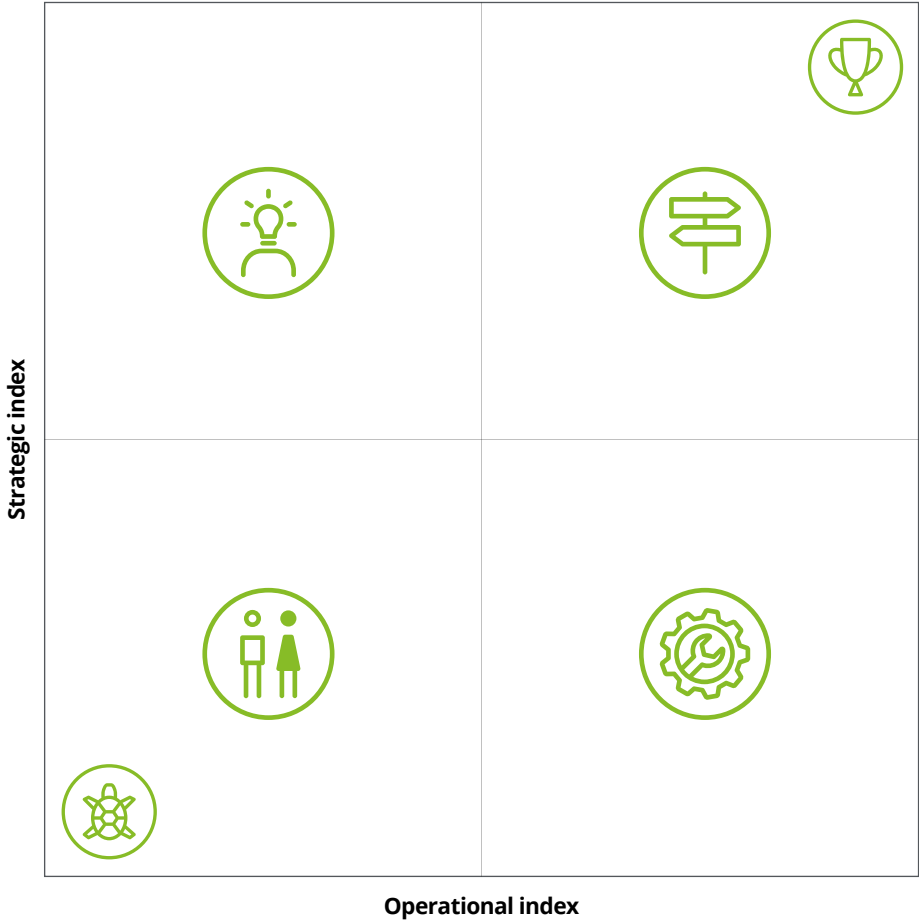
01 Key findings and overview

Six evolving digital archetypes

Digital archetypes

-  **Champions** combine consistent digital strategy with operational excellence to achieve a flexibility advantage
-  **Potentials** focus on developing their digital strategy hand in hand with operational excellence to achieve cost advantages
-  **Innovators** show distinct advances in digital business through an innovative portfolio but have average operational success
-  **Operators** focus on digitalizing their core value chain, founding their success on flexibility through innovative solutions
-  **Followers** seek to consistently advance digital skills in both index dimensions. Connecting initiatives is essential to improve
-  **Laggards** lack digital skills in both index dimensions using digitalization to improve overall efficiency

Fig. 2 – Strategic and operational maturity



Facts and figures from the 2025 survey

How German companies are managing digital transformation in 2025



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02 Facts and figures from the 2025 survey

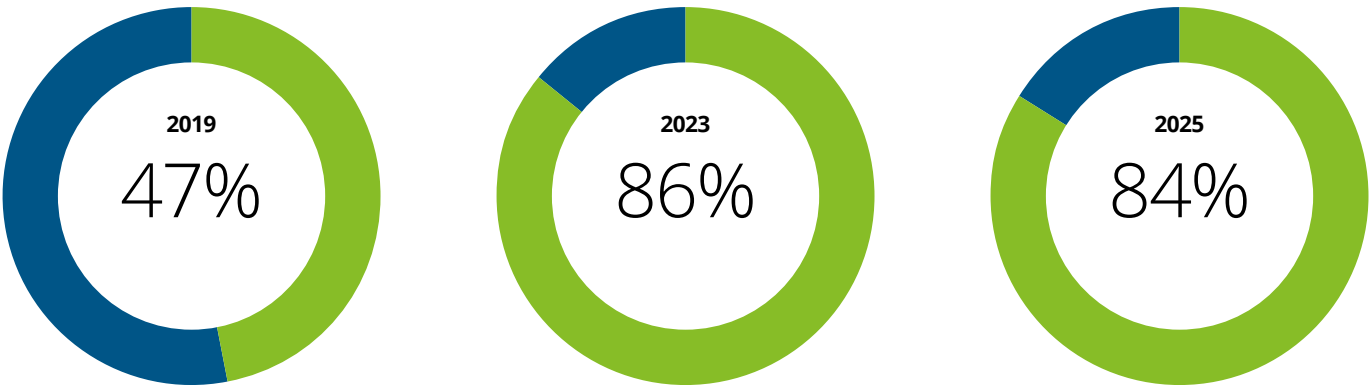
Slight decline in satisfaction with the digital transformation

Digital transformation has progressed significantly compared with 2019. Only 2% of the companies surveyed have not yet started their digital transformation as of 2025. Yet satisfaction with the progress of their own digitalization has not increased among companies compared with 2023.

Many companies find themselves in a “dangerous middle ground” between analog and digital operations, which creates complexity without delivering efficiency. This partial transformation often results in increased operational complexity and inefficiencies, contributing to dissatisfaction.

Fig. 3 – Satisfaction with transformation progress

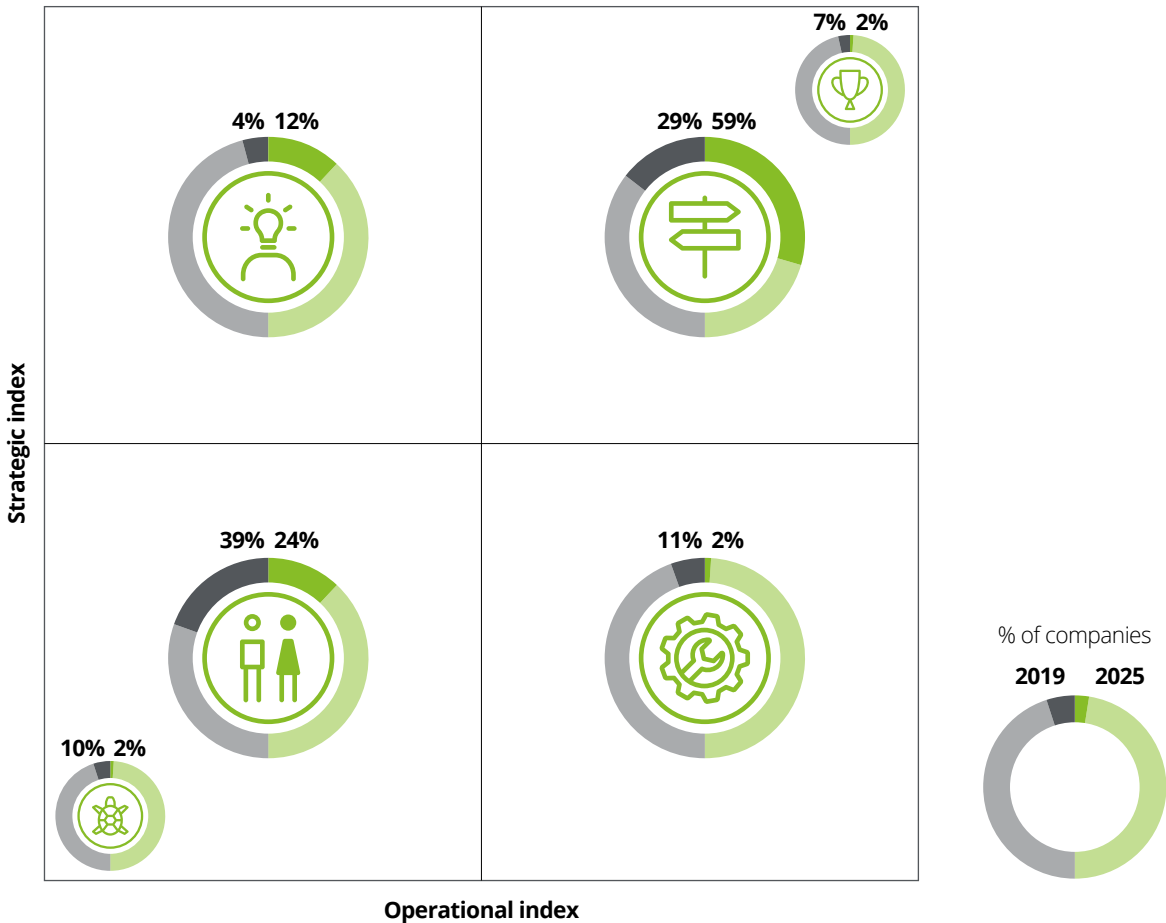
Satisfaction rate



More companies assigned to the mature archetypes

Overall, companies are succeeding in improving their level of digitalization. In particular, there are fewer archetypes in the less-digitalized area of Operators, Followers and Laggards. But we also see a decrease in the Champions archetype, as geopolitical issues have forced many companies to reassess their strategies. All in all, the Potentials archetype is the biggest winner, focusing on a digital strategy and operational excellence. This allows them to achieve cost advantages at a time when they are much needed.

Fig. 4 – Archetypes distribution



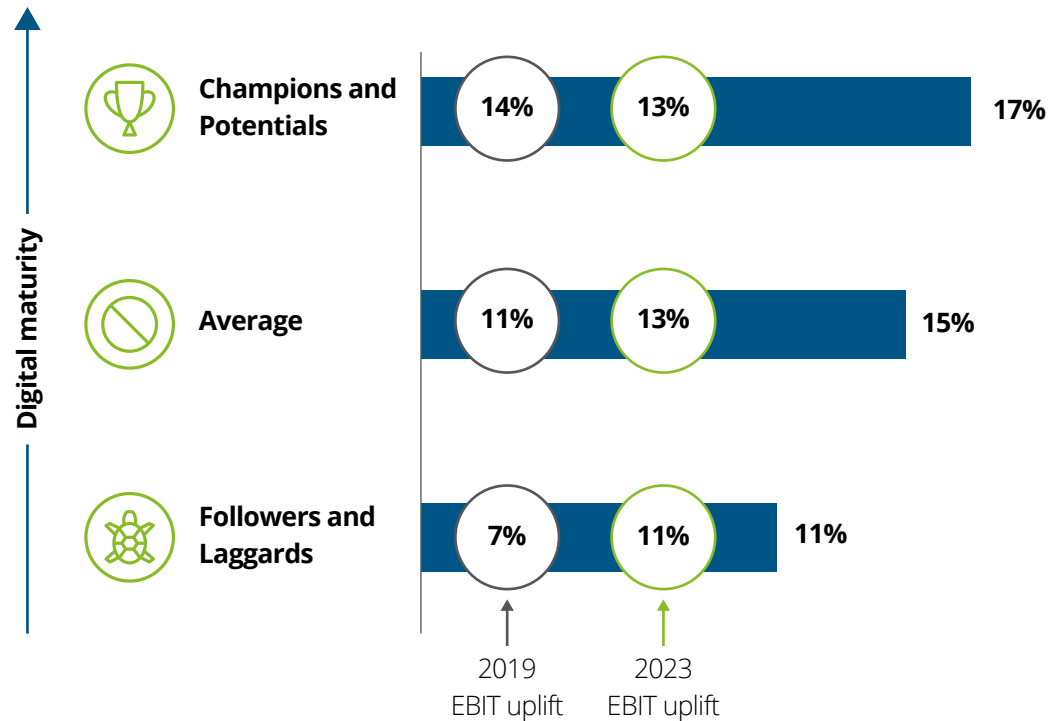
02 Facts and figures from the 2025 survey

Digital archetypes vary in terms of business impact

In contrast to previous years, a higher EBIT uplift is now clearly achieved by more digitalized players, highlighting the financial benefits of advanced digital transformation. This is particularly true for the “Champions” and “Potentials” archetypes, which show a strong understanding of both strategic and operational dimensions.

For the less digitalized archetypes, there has not been a clear improvement in recent years, emphasizing the necessity of mastering both facets of the digital transformation to achieve EBIT uplift. Focusing on either the strategic or operational aspects alone will not yield the desired EBIT and revenue uplift.

Fig. 5 – EBIT uplift 2025 Germany



Crises accelerate digitalization for Champions and Potentials

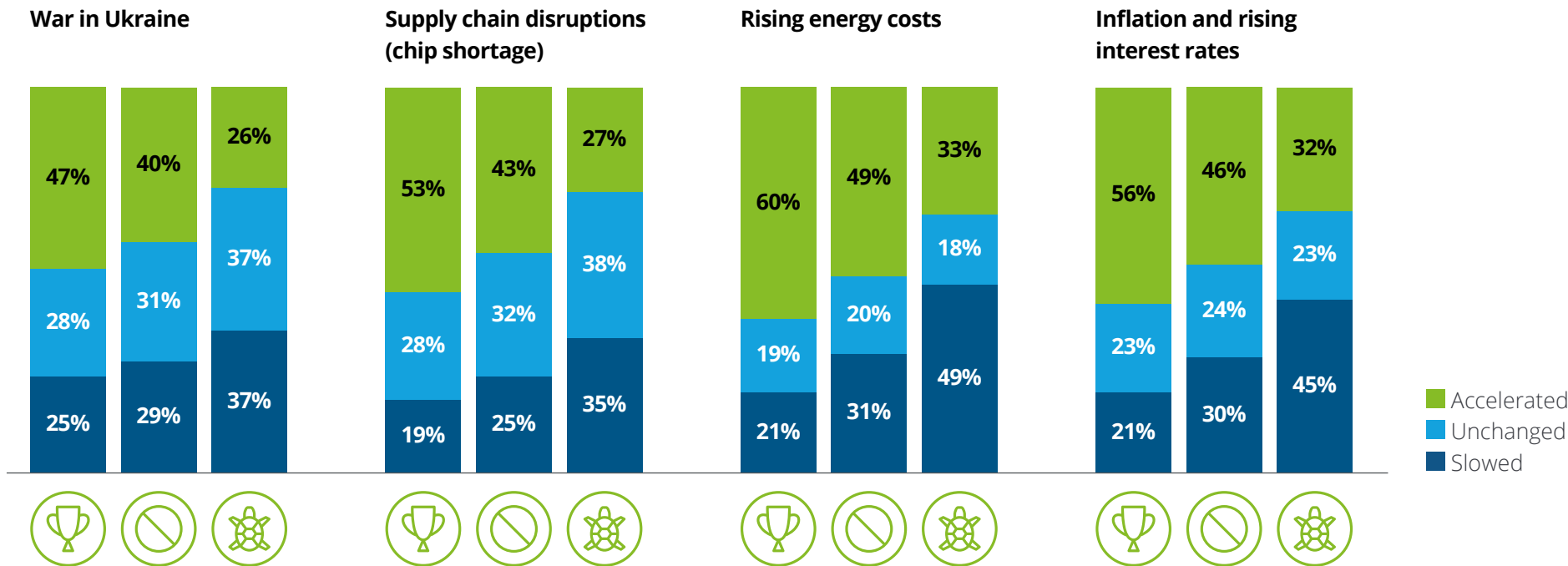
The global crises of recent years have had both positive and negative impacts on the digitalization of companies. The crises have not negatively affected the digitalization process of Champions and Potentials. Instead, the challenges associated with the crises have accelerated the pro-

cess by about 10% more than the average, as these companies are better equipped to deal with such disruptions.

Laggards and Followers have suffered most from the higher energy costs, and rising inflation and interest rates

(15–20% more than the average). This will not only slow down the digitalization progress in the short-term but will also affect the digitalization progress in the long term, as cost reductions and the necessity to become more agile are still in the spotlight.

Fig. 6 – How current challenges have influenced the digitization progress of different archetypes



Down to the engine room – how to excel in transformation

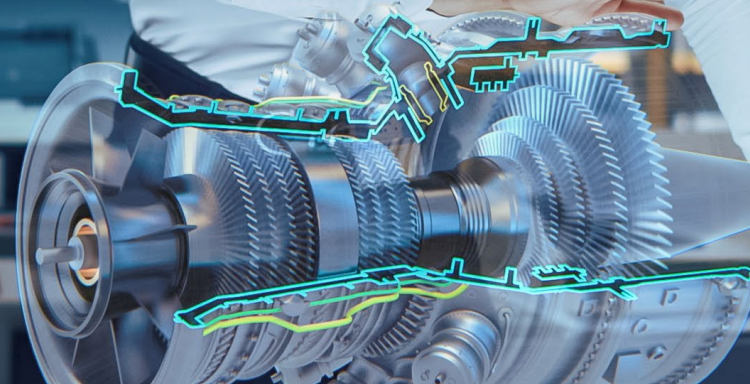
Success factors, determining technologies,
and implementation progress



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OPEN PROJECT
TASK BOARD
OVERVIEW
SETTING



03 Down to the engine room – how to excel in transformation

Data analytics is becoming a commodity for companies today

Data analytics is used to evaluate an existing database in a targeted manner.

In 2025, around 97% of all companies are using data analytics in some form (vs. 86% in 2019). On average, German companies have understood the potential of data and have standardized analysis in place.

Over half of Digital Champions and Potentials are now utilizing data analytics to derive forward-looking decision recommendations.

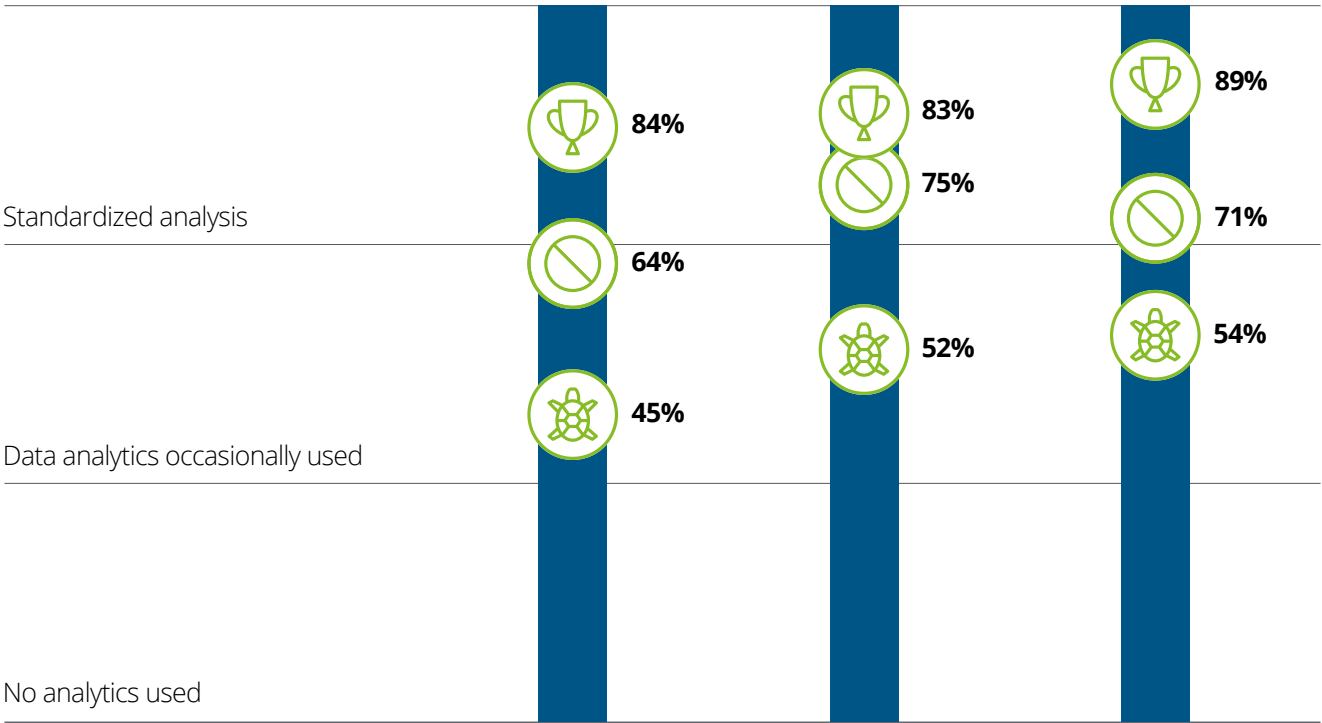


98%

...of **Champions** and **Potentials** are using **data analytics** as a part of **standardized processes** in 2025

Fig. 7 – Use of data analytics in Germany

Derivation of actions from data analysis



No analytics used



03 Down to the engine room – how to excel in transformation

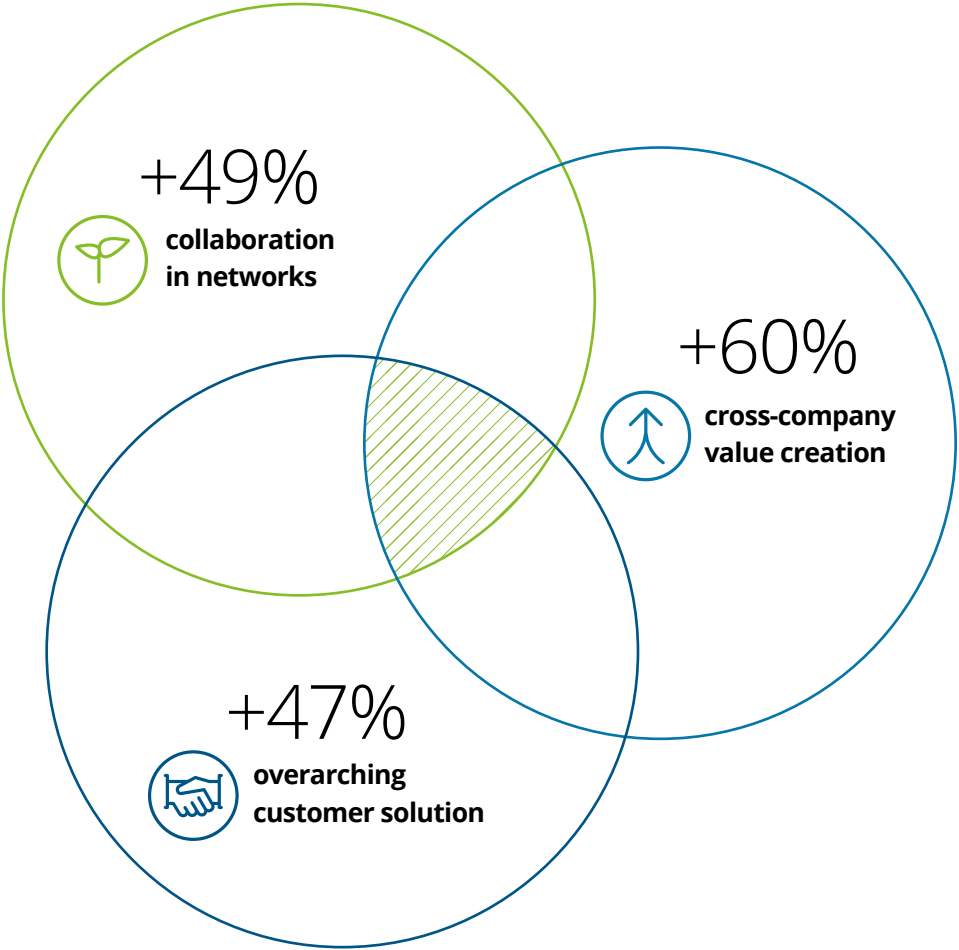
Companies are participating in ecosystems

Fig. 8 – Comparison between 2019 and 2025 on the share of companies involved in ecosystem-related activities

Analysis

Most companies are now making great efforts to build ecosystems compared to six years ago. In an increasingly digitalized world, asset-heavy industries are starting to follow the example of tech giants by realizing the enormous value that lies within ecosystem play.

This is reflected in the fact that collaboration in corporate networks has increased by an immense 49% and the associated cross-company value creation by 60% compared to 2019. And over 47% of the respondent companies set a framework through a joint overarching customer solution.



Top investment goals by digital initiatives 2025

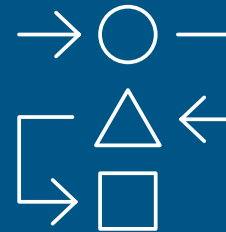
Several organizational/business unit initiatives are investing heavily in the following digital initiatives. The priority this year lies clearly in optimizing costs, as companies are under pressure due to economic uncertainty. In order to successfully navigate the transformation, improving the customer experience is key as a way of increasing loyalty to the product or service through an individualized approach. **Moreover, companies have shifted their investments to digital R&D, driving the trend towards automation of strategic and operational processes.**



1. Cost optimization



2. Improving customer experience



3. Improving operational agility



4. Employee experience



5. Developing or improving existing products



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All bets are off in digital transformation

The cards are being reshuffled in digitalization and leading companies are focusing on broad-based transformations. Do you want to understand your competitive position and draw the right conclusions? Get in touch with us.

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