BRIGHT

SURVEY REPORT

Digital Pulse Survey 2025

Introduction

In an era where digital transformation is no longer optional, understanding how decision-makers shape their digital strategies has never been more important. The Digital Pulse Survey 2025 provides exclusive insights into how companies assess their digital maturity, define strategic priorities, and tackle key challenges.

Between January and March, 2025, we asked **2.000** mainly **decision-makers** from various industries and company sizes. These leaders, **primarily from IT, marketing, and executive roles**, provided valuable insights into how businesses are approaching digital transformation. The survey was conducted in English and German and targeted professionals responsible for shaping their organization's digital future.

Each section in this report presents key findings from the survey, supported by data visualizations, expert insights, and actionable recommendations. The goal is to provide a benchmark for businesses looking to refine their digital strategy and gain a competitive edge in the evolving digital landscape.

Who participated in the survey?

- **Industry Representation**: A diverse mix of B2B and B2C companies, including manufacturing, retail, financial services, and technology sectors.
- **Company Size**: Ranging from SMEs to large enterprises.
- **Geographical Reach**: Respondents were from various European and global markets – with a focus on our core markets Germany and Austria.
- **Job Roles**: Primarily C-Level Executives, IT Leaders, Marketing Directors, and Digital Strategy Managers.

For a more detailed breakdown of the survey demographics please refer to the respective report chapter.

" Digital transformation is no longer about if—it's about how fast and how well companies can adapt. This survey reveals what decision-makers are prioritising, where they struggle, and how they plan to stay ahead in an increasingly dynamic digital landscape.
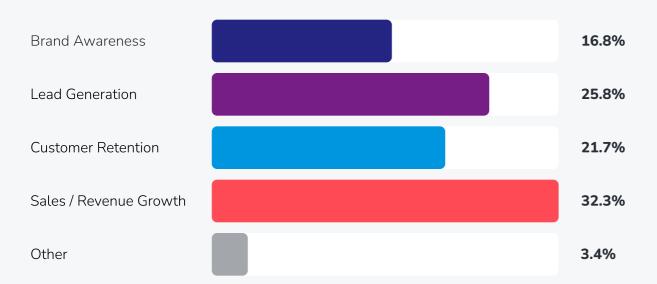
— KLAUS UNTERKIRCHER, CEO

What drives digital investment?

Top Priorities for 2025

Businesses remain focused on growth and efficiency, with sales and revenue generation leading digital initiatives. Customer engagement and personalisation is the most critical investment area, closely followed by AI and automation. While expanding into new markets is a clear priority, many companies are also looking inward to optimise costs, flexibility, and implementation speed.

When thinking about your digital strategy, which of these goals are most important to you?

Goal	Percentage
Brand Awareness	16.8%
Lead Generation	25.8%
Customer Retention	21.7%
Sales / Revenue Growth	32.3%
Other	3.4%

STRATEGIC TAKEAWAYS

Revenue remains king. Sales growth continues to dominate across all industries and regions. However, lead generation and customer retention are equally critical in many segments.

Personalisation drives investment. Customer engagement is the most important digital initiative for 2025, highlighting a shift toward data-driven, tailored experiences.

AI & automation are essential. AI/ML and automation are at the core of digital success, with a strong focus on efficiency, predictive analytics, and customer interactions.

Operational efficiency is key. IT/Operations teams are prioritising cost reduction and streamlined processes, while Marketing focuses on brand-building and personalisation.

US vs. Europe: Different priorities. While US respondents focus more on lead generation and cost efficiency, companies in Germany and Austria prioritize technology innovation and scalability.
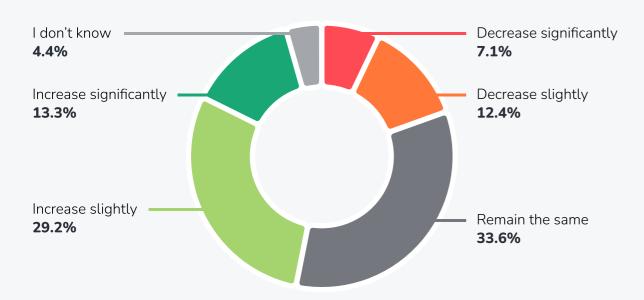
Digital Budget Trends

Despite economic uncertainties, most companies will maintain or increase digital budgets in 2025. Nearly a third plan to increase spending, reinforcing the commitment to technology-driven growth.

How do you anticipate your digital budget will change in 2025?

I don't know
4.4%

Decrease significantly
7.1%

Increase significantly
13.3%

Decrease slightly
12.4%

Increase slightly
29.2%

Remain the same
33.6%

STRATEGIC TAKEAWAYS

Stable investment outlook. Over 76% of businesses expect their digital budgets to stay the same or grow, indicating confidence in long-term digital transformation.

Cost-conscious but committed. While some industries emphasize efficiency, few plan to significantly reduce digital investments, underlining the necessity of digitalization.

Retail & e-commerce are bullish. This sector shows above-average investment in customer engagement, reinforcing the need for omnichannel strategies.
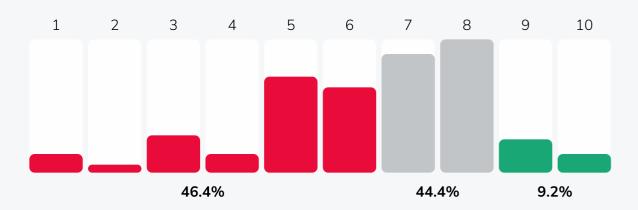
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How do companies rate their Digital Customer Experience?

Digital CX Ratings Show Potential for Growth

Customer experience remains a top priority for digital initiatives, but many organizations see room for improvement. When asked to rate the customer experience on their website or online shop, respondents gave an **average score of 6.3 out of 10**. While this indicates a generally positive perception, there is clear potential for enhancement.

How would you rate the customer experience on your website or online shop? ①

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

46.4%   **44.4%**   **9.2%**

- A significant portion of **responses clustered around 5 to 8**, suggesting a need for refinements rather than complete overhauls.

- **Marketing teams** rated their customer experience slightly **higher at 6.7** than the overall average.

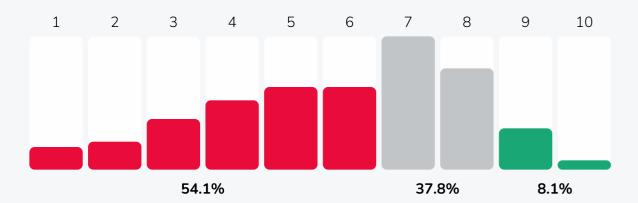- **Larger companies** (51+ employees) rated their customer experience **below average** at **6.5**.

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Integration Challenges in Digital Journeys

A seamless customer journey across digital channels remains a challenge. When asked how effectively their digital channels are integrated to support a seamless customer journey, respondents gave an **average score of 5.9 out of 10** – lower than the overall customer experience rating.

How effectively are your digital channels integrated to support a seamless customer journey? ⬜1

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

54.1%   **37.8%**   **8.1%**

👮 **IT/Operations teams rated integration lower** at **5.0**, highlighting more frustration on the technical side.

👤 **Marketing teams rated integration higher** at **6.4**, reflecting their confidence in messaging consistency but still acknowledging integration gaps.

🧩 The results suggest that while companies have made progress in creating digital experiences, **siloed systems and fragmented touchpoints** still disrupt seamless customer interactions.
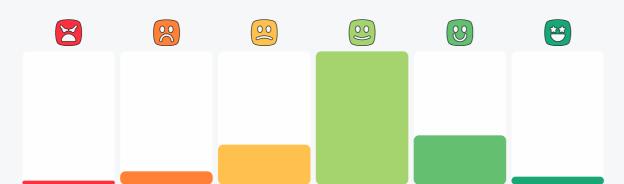
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How Satisfied Are Companies with Their Digital Tools?

When asked to rate the performance and usability of their digital platforms and tools, the **average score was 3.9 out of 6**, indicating a mid-level satisfaction.

Many respondents felt that their tools were functional but not exceptional, with frustration around slow performance, lack of flexibility, and integration challenges.

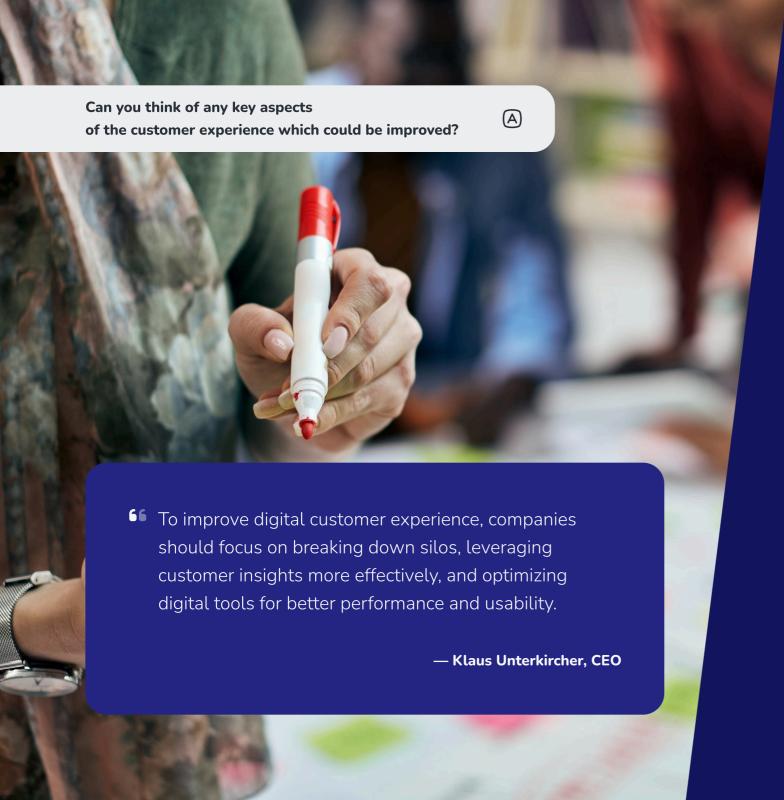**How satisfied are you with the performance and usability of your current digital platforms and tools?**

STRATEGIC TAKEAWAYS

- Customer experience scores (6.3/10) show progress but leave room for improvement.

- Integration of digital channels is still a major challenge (5.9/10), particularly for IT teams.

- Companies recognize the need for better omnichannel consistency, personalization, and post-purchase support.

- Digital tools receive a moderate satisfaction rating (3.9/6), with performance and integration issues persisting.

> " To improve digital customer experience, companies should focus on breaking down silos, leveraging customer insights more effectively, and optimizing digital tools for better performance and usability.
>
> **— Klaus Unterkircher, CEO**

Where Can Customer Experience Be Improved?

Respondents identified several areas for improvement in their digital customer experience:

- Better **omnichannel integration** and **consistency across touchpoints**.
- More **personalization and interactive content**, such as AI-driven recommendations and VR experiences.
- **Seamless transitions between digital channels**, ensuring customers can move effortlessly between platforms.
- **Improved post-purchase support**, including enhanced customer service and better return processes.

These findings reinforce the need for companies to align their digital platforms and ensure a frictionless, tailored customer journey.
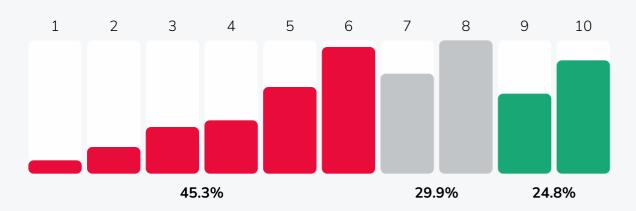
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Are departments aligned on digital initiatives?

Interdepartmental Collaboration on Digital Initiatives

A strong foundation of cross-functional collaboration is essential for digital transformation success. Our survey results show collaboration is generally positive but varies by department.

How well do departments within your organization (e.g., IT, Marketing, Sales) collaborate on digital initiatives? ①

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

45.3%   29.9%   24.8%

KEY TAKEAWAYS & RECOMMENDATIONS

Overall collaboration score at **6.7 of 10**.

Marketing teams report the lowest satisfaction **(5.7/10)**, indicating potential silos.

IT & Operations teams have the highest rating **(6.9/10)**, showing better internal alignment.

Sales & Strategy teams score slightly below average **(6.3/10)**, pointing to alignment challenges.

Larger companies (51+ employees) rate collaboration lower **(6.3/10)** than **smaller organizations (6.9/10)**.

These findings suggest that while many organizations collaborate effectively, gaps remain—especially between marketing and other departments. Addressing these misalignments will be key to successful digital execution.

What digital initiatives are you prioritizing for 2025?

Digital Priorities for 2025

For 2025, key digital priorities center on **enhancing customer engagement** (18.4%), adopting **new technologies** like AI (17.1%), and expanding into **new markets** (16.2%). Organizations are also focusing on increasing **implementation speed** and **operational efficiency** (both 11.5%).

Priorities differ by department, with Marketing emphasizing personalization, IT focusing on AI and automation, and Sales targeting omnichannel and speed.

DEPARTMENT, INDUSTRY AND REGIONAL TRENDS

- **Marketing teams** prioritize customer engagement to drive personalization.
- **IT & Operations teams** focus on AI & automation to enhance efficiency.
- **Sales & Strategy teams** emphasize omnichannel, expansion, and speed.
- **Retail & Ecommerce teams** target operational efficiency and AI-based automation.
- **U.S. respondents** prioritize compliance & security (11.1%).

Customer engagement & personalization (18.4%) – The leading focus area across industries.

New technologies (e.g., AI) (17.1%) – Continued investment in automation and AI-driven solutions.

New markets/audiences (16.2%) – Expansion remains a key growth strategy.

Flexibility & speed of implementation (11.5%) – Faster digital execution is a growing need.

Operational costs & efficiency (11.5%) – Companies seek to streamline processes.

Editorial tools/productivity (7.5%) – Optimizing workflows and content creation.

Omnichannel strategies (6.2%) – Enhancing seamless cross-channel experiences.

Compliance & data security (5.3%) – More relevant in the U.S. (11.1%).

Department Representation in the Survey

Survey representation explains key digital priorities:

- **Marketing & Communication** is the largest group (26.2%), influencing the strong focus on engagement.
- **Sales** (21.5%) and **Strategy** (15.9%) together represent nearly 40%, supporting expansion goals.
- **IT/Operations** (18.7%) drive tech-centric initiatives.
- **Executives** (COO, Partnerships, etc.) in the 'Other' category (17.8%) indicate a strategic focus on digital growth.

KEY TAKEAWAYS & RECOMMENDATIONS

🤝 **Improve Cross-Department Collaboration:** Marketing teams report lower collaboration scores—better integration with IT and sales is needed.

🔍 **Customer Engagement Leads Digital Priorities:** Data-driven marketing and AI-powered experiences will be key drivers.

🤖 **AI & Automation Are IT Priorities:** Companies must align AI adoption with business needs.

🎯 **Omnichannel & Expansion Require Streamlined Execution:** Ensuring seamless cross-channel experiences is crucial.

👤 **Compliance & Security Vary by Region:** U.S. companies focus more on security—global businesses should tailor their strategies accordingly.
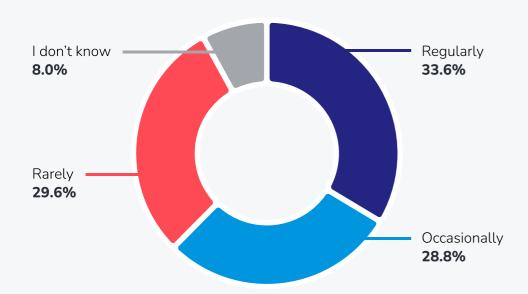
How do businesses measure success?

Measuring Success: Feedback & Performance

Regular feedback collection represents a key indicator of digital maturity.

How often do you gather customer feedback to improve your digital channels?

I don't know
8.0%

Rarely
29.6%

Regularly
33.6%

Occasionally
28.8%

Gathering Customer Feedback: A Missed Opportunity?

Customer feedback collection:
- 33.6% gather feedback regularly,
- 28.8% do so occasionally,
- 29.6% rarely collect feedback, and
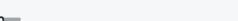- 8% don't know how often feedback is gathered.

The disparity between the importance of digital experience and the lack of systematic feedback collection suggests that businesses might be making assumptions about customer needs rather than basing decisions on direct insights.

Areas for Improvement in Digital Platforms

Survey respondents highlighted key areas where digital platforms need enhancement.

INDUSTRY & REGIONAL TRENDS

🛒 Retail & Ecommerce prioritize AI & automation to enhance customer experiences and streamline operations.

👨‍💼 Marketing teams emphasize personalization & engagement but face resource and integration challenges.

🏴 U.S. businesses are more focused on compliance & security (9.4%) compared to European counterparts.

👮 IT/Operations teams focus on data-driven decision-making and platform efficiency.

KEY TAKEAWAYS

⏱ **Optimize Platform Performance:** Infrastructure and workflows should be refined to improve satisfaction scores.

📈 **Enhance Analytics & ROI Measurement:** Address measurement gaps to improve reporting and justify digital investments.

🔌 **Improve Cross-Platform Integration:** Breaking down silos will enable a more seamless digital ecosystem.

🤖 **Leverage AI for Automation:** AI adoption can improve efficiency but should be balanced with a human-centric approach.

🎯 **Strategic Budget Allocation:** Businesses must address resource constraints to fund key digital initiatives.

What are the biggest roadblocks?

Key Challenges in Digital Strategy

As businesses refine digital strategies, persistent roadblocks impact efficiency, customer experience, and performance. Survey results highlight key challenges, notably integration and data flow (10.4% cite platform integration issues) due to struggles connecting systems. Cross-channel consistency also remains difficult for many (12.9%).

Companies increasingly look to AI and automation for efficiency and personalization, while user experience (UX) remains a priority, focusing on accessibility and intuitive interfaces. Cost efficiency through tool consolidation and better data integration/analytics for decision-making are also key improvement areas.

To overcome these challenges, organizations must strengthen integration strategies, improve analytics, and invest in UX. Developing better ROI frameworks and exploring automation to bridge skill gaps are also needed to create seamless digital experiences and drive success.

What are the key challenges in your digital marketing and sales efforts?

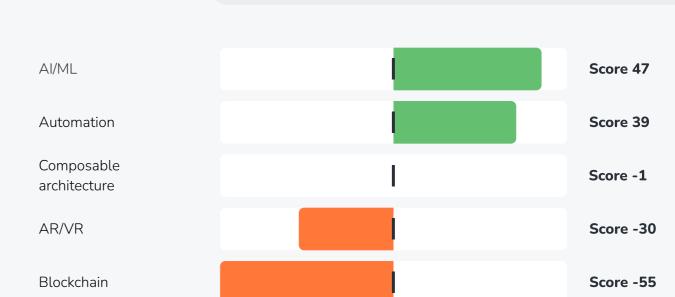| Challenge	Percentage
Limited budget or resources	28.9%
Poor cross-channel consistency	12.7%
Measuring ROI or campaign success	11.9%
Lack of expertise or personnel	11.5%
Platform integration issues	10.7%
Low customer engagement or conversion	9.9%
Keeping up with technology and trends	7.9%
Legal/Security compliance	6.7%

What's shaping the future?

AI and Automation Lead 2025 Tech Priorities

The digital landscape in 2025 will be shaped by emerging technologies that businesses consider most critical to their success. **AI and Machine Learning** (AI/ML) lead the way, with a score of 47, as organizations increasingly leverage these technologies for automation, decision-making, and personalization at scale. Closely following AI/ML is **Automation**, scoring 39, highlighting the need for efficiency and streamlined operations across industries.

Conversely, **Blockchain** and **Augmented Reality/Virtual Reality** (AR/VR) are seen as less relevant for immediate digital success, scoring -55 and -30, respectively. Many companies view these technologies as longer-term opportunities rather than immediate strategic imperatives. Interestingly, **Composable Architectures** received a neutral score of -1, indicating a split in opinion about their immediate necessity.

> ℹ️ A MaxDiff question asks respondents to choose the most and least important items from a list, revealing clear priorities. It's useful for trend analysis—like with emerging technologies—because it highlights what truly stands out or lags behind.

Which emerging technologies do you consider most/least critical to your digital success in 2025?

Technology	Score
AI/ML	Score 47
Automation	Score 39
Composable architecture	Score -1
AR/VR	Score -30
Blockchain	Score -55

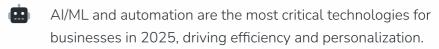**Innovation Priorities in Digital Strategy**

When asked about the most pressing areas for improvement, respondents identified **customer experience enhancement** as a top priority. Businesses are focused on **refining user journeys**, **improving engagement**, and ensuring **seamless omnichannel** interactions. Additionally, **streamlining internal digital processes** is a major focus, as companies seek greater efficiency and reduced operational bottlenecks.
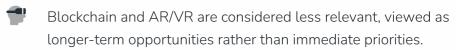
Security and compliance remain key concerns, particularly in industries with stringent regulatory requirements. Organizations acknowledge the importance of strengthening cybersecurity frameworks and ensuring data privacy compliance to navigate an increasingly complex digital landscape

Other notable improvement areas include:

- More effective **marketing and sales alignment**, including lead attribution and better collaboration between departments.
- **Greater efficiency** in digital initiatives, with a focus on automation and reducing redundancies.
- **Targeted content and personalization**, ensuring more meaningful engagement through refined messaging and audience segmentation.
- **Resource optimization**, including securing additional budget for content and paid advertising in key markets.

KEY TAKEAWAYS & RECOMMENDATIONS

🤖 AI/ML and automation are the most critical technologies for businesses in 2025, driving efficiency and personalization.

🥽 Blockchain and AR/VR are considered less relevant, viewed as longer-term opportunities rather than immediate priorities.

😍 Customer experience, process efficiency, and security are top innovation priorities for digital strategy.

🤝 Businesses seek better marketing-sales integration, improved efficiency, and enhanced personalization in their digital strategies.

INDUSTRY AND REGIONAL TRENDS

🛒 **Retail and eCommerce** focus on AI and automation but struggle with integration challenges.

👨‍💼 **Marketing teams** prioritize engagement and personalization but cite budget and resource constraints as major barriers.

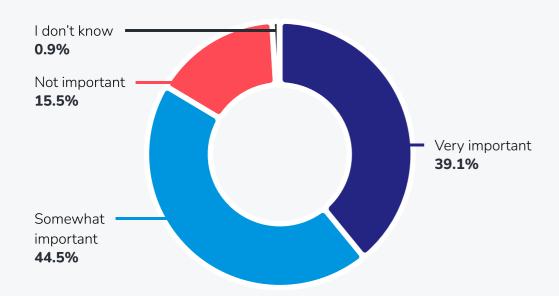🎌 **U.S. businesses** (9.4%) are more focused on compliance and security compared to their European counterparts.

How green are digital transformations?

Sector-Specific Differences in Sustainability Priorities

While sustainability is gaining traction in digital transformation, businesses remain divided on how much emphasis it should receive relative to other priorities. The coming years will likely see increasing pressure from consumers and regulations, making sustainability a more integral part of digital decision-making.
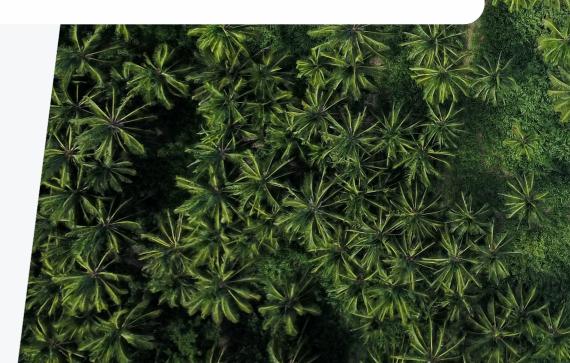
How important is sustainability in your digital strategy?

- I don't know **0.9%**
- Not important **15.5%**
- Somewhat important **44.5%**
- Very important **39.1%**

KEY TAKEAWAYS

- **83,6%** of businesses acknowledge sustainability as **important**, though only **39.1%** rank it as a **top priority**.

- Companies in **Austria and Germany** show a slightly **stronger commitment** to sustainable digital strategies compared with other regions.

- **Retail and Ecommerce** sectors are **polarised** on either leading the push for greener digital transformation or ignoring it.

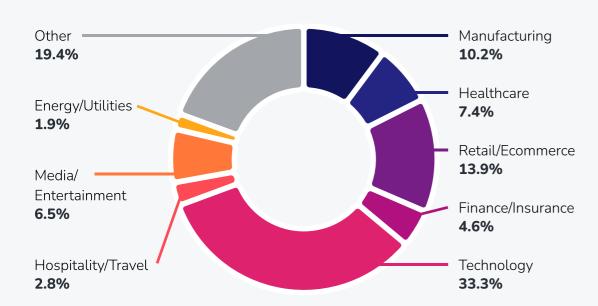- **IT and Marketing** teams overall focus more on efficiency and demonstrate **lower priority** for sustainability.

A Look at the Survey Respondents

Industry Representation

The survey respondents come from a diverse range of industries, with the most represented sectors being Technology, Retail/Ecommerce, Manufacturing, and Finance/Insurance. A notable portion of respondents (18.7%) classified their industry as "Other," including Consulting, Logistics, and Agency Services.

Business Size

While small businesses (1-50 employees) formed the largest individual category at 36.4%, the combined majority of respondents came from organizations with 51+ employees, indicating a strong focus on digital transformation within larger enterprises.
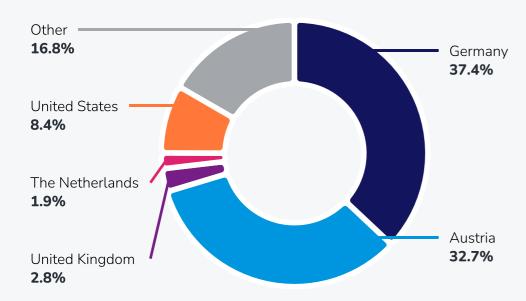
Which industry does your business belong to?

Other
19.4%

Energy/Utilities
1.9%

Media/
Entertainment
6.5%

Hospitality/Travel
2.8%

Manufacturing
10.2%

Healthcare
7.4%

Retail/Ecommerce
13.9%

Finance/Insurance
4.6%

Technology
33.3%

What is the size of your business?

1000+ employees
29.6%

201-1000
employees
20.4%

1-50 employees
36.1%

51-200 employees
13.9%

Geographic Distribution

The survey was largely represented by respondents from Germany (37.4%) and Austria (32.7%), followed by the United States (8.4%). A smaller number of participants came from the United Kingdom (2.8%), the Netherlands (1.9%), and a mix of other countries (16.8%), including Switzerland and multi-national organizations with offices across Europe and North America.
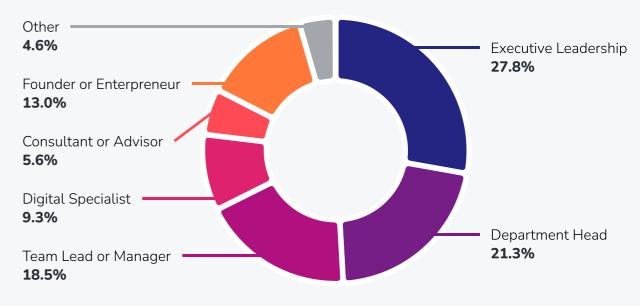
Roles

Survey participants held a range of decision-making roles, with Executive Leadership (27.1%) and Department Heads (21.5%) making up nearly half of the respondents. Team Leaders and Managers (18.7%), Founders/ Entrepreneurs (13.1%), and Digital Specialists (9.3%) were also well represented. Additional responses came from Consultants/Advisors (5.6%) and other business professionals.

In which country is your company located?

Other
16.8%

United States
8.4%

The Netherlands
1.9%

United Kingdom
2.8%

Germany
37.4%

Austria
32.7%

What is your role in the business?

Other
4.6%

Founder or Enterpreneur
13.0%

Consultant or Advisor
5.6%

Digital Specialist
9.3%

Team Lead or Manager
18.5%

Executive Leadership
27.8%

Department Head
21.3%
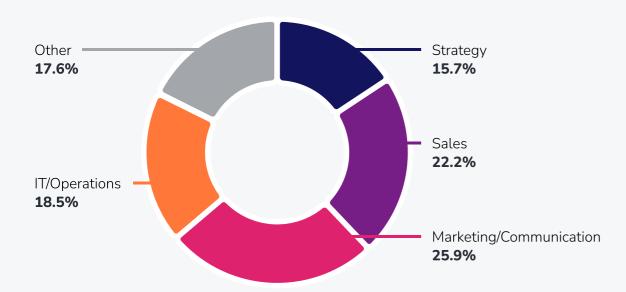
Departments

From a departmental perspective, respondents were primarily from Marketing/ Communication, Sales, IT/Operations, and Strategy. Other responses included executives overseeing Partnerships, People, and Business Operations.

Which department do you belong to?

Other
17.6%

Strategy
15.7%

Sales
22.2%

IT/Operations
18.5%

Marketing/Communication
25.9%

KEY TAKEAWAYS

Technology, Retail, Manufacturing, and Finance/Insurance were the most represented industries.

Large enterprises (1000+ employees) accounted for nearly a third of respondents, with mid-sized and small businesses also present.

Germany, Austria, and the U.S. dominated the survey's geographic representation.

Senior leadership, department heads, and team leaders made up the majority of participants.

Marketing, Sales, IT/Operations, and Strategy were the primary departments driving digital transformation.

This demographic overview provides essential context for interpreting the survey results, ensuring that the insights reflect the priorities of key industries, company sizes, and decision-makers shaping digital strategy in 2025.

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Websites, Online Shops and Apps for Ambitious Brands

At Bright IT, we turn ideas into digital excellence — and have been doing so for nearly 20 years. From our offices in Austria and Poland, we craft tailored, scalable websites, apps, and e-commerce solutions that are built to last. More than just a digital agency, we're a long-term partner, combining creativity and deep technical expertise to deliver real business impact for our international clients.

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