

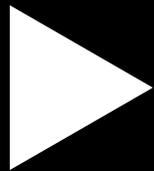


Strategy₪

The State of AI+BI Analytics Global 2025 Survey

Germany

Start



Executive Summary

In 2025, German organizations are moving decisively from AI-powered analytics pilots to production deployments that deliver measurable outcomes. This shift is fueled by the need for cost efficiency, improved decision-making, and higher customer satisfaction in a competitive, regulated market. Organizations are placing particular emphasis on extending analytics capabilities to non-technical staff, outpacing the rate of automation for technical experts. Mature adopters are pairing AI+BI initiatives with robust governance frameworks, reducing risks from inconsistent answers and enabling data-driven decisions at scale.

Looking ahead, the priority is embedding AI+BI into daily workflows, expanding literacy programs, and ensuring sovereign AI strategies that guard against vendor lock-in.

- **Cost savings** rank as the top AI+BI outcome for 52% of German respondents.
- Gains in **employee productivity** are reported by 43% of organizations.
- Through AI-powered analytics, 37% have improved **customer satisfaction**.
- Just 9% are **fully operational** across multiple AI+BI use cases and departments.



68% report positive business impact from their AI+BI investment



43% have automated at least one workflow for data experts, equal to the global average of 42.5%



54% have deployed AI+BI to help less technical staff answer data questions



50% have implemented corporate-wide governance with a semantic data layer

What sets leaders apart?

Leaders in Germany integrate AI+BI into the core business model rather than treating it as a standalone initiative. They prioritize governance and scalability alongside innovation. This ensures analytics remains both compliant and impactful across the organization.

Table of Contents

1	Executive Summary
2	Key Takeaways
3	AI+BI Maturity
4	Motivators & Winners
5	Automation & Access
6	Agents & Bots
7	Scaling Plans
8	Challenges
9	Pfizer: SMART Global Analytics
10	Schwarz IT: Powering Global Retail
11	Conclusion
12	Research Methodology

Key Takeaways

German organizations are advancing AI-powered analytics with a focus on practical, high-impact outcomes. Scaling access and aligning analytics with strategic priorities are central to this progress.

Self-Service Leads the Way

A majority are prioritizing AI+BI access for non-technical staff, moving faster here than in automating technical workflows.



Governance Strengthens Results

Half have implemented a semantic data layer, addressing inconsistent answers and boosting trust.

Cost Savings Drive Momentum

Organizations achieving early savings are reinvesting to expand use cases and embed analytics deeper into operations.



Table of Contents

- 1 [Executive Summary](#)
- 2 [Key Takeaways](#)
- 3 [AI+BI Maturity](#)
- 4 [Motivators & Winners](#)
- 5 [Automation & Access](#)
- 6 [Agents & Bots](#)
- 7 [Scaling Plans](#)
- 8 [Challenges](#)
- 9 [Pfizer: SMART Global Analytics](#)
- 10 [Schwarz IT: Powering Global Retail](#)
- 11 [Conclusion](#)
- 12 [Research Methodology](#)

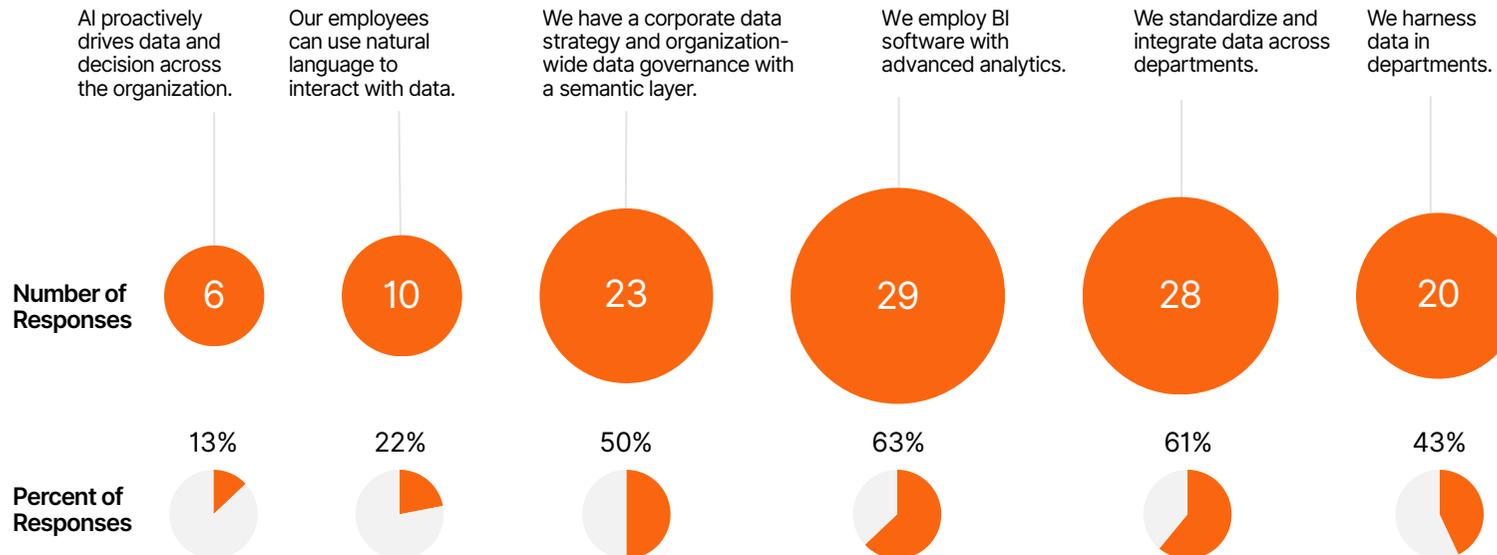
AI+BI Maturity

German organizations are progressing along the AI+BI maturity curve from departmental analytics toward enterprise-wide governance and advanced capabilities. This growth reflects a steady balance between expanding use cases and building trust in data.

- **50%** have standardized results across the organization through a semantic data layer.
- **22%** are using plain-language interfaces to enable broader user engagement with analytics.
- **13%** are early adopters testing proactive AI that can drive decisions without prompts.

Analytics Maturity Snapshot

German enterprises advance toward trusted, enterprise-wide AI+BI



Data Foundation

A semantic layer ensures all departments use the same definitions and metrics, preventing inconsistencies and enabling reliable decision-making. In Germany, its adoption is a hallmark of mature AI+BI programs.

Table of Contents

- 1 [Executive Summary.](#)
- 2 [Key Takeaways](#)
- 3 [AI+BI Maturity.](#)
- 4 [Motivators & Winners](#)
- 5 [Automation & Access](#)
- 6 [Agents & Bots](#)
- 7 [Scaling Plans](#)
- 8 [Challenges](#)
- 9 [Pfizer: SMART Global Analytics](#)
- 10 [Schwarz IT: Powering Global Retail](#)
- 11 [Conclusion](#)
- 12 [Research Methodology.](#)

Motivators & Winners

In Germany, AI-powered analytics adoption is guided by practical priorities, with decision-making improvements and operational efficiency leading the charge.

Organizations are also looking to empower frontline workers, recognizing their potential to act quickly on data insights. Cost reduction remains a strong motivator, especially where ROI is closely monitored. Board-level and executive mandates play a larger role here than in some other regions, ensuring alignment between analytics and corporate strategy.

Leaders connect these motivators to tangible outcomes across departments, from finance to customer support.

Why It Matters

Clear motivators enable German organizations to target AI+BI investments where they deliver the highest impact. Departments such as operations and customer service can act faster and more effectively when analytics is embedded into workflows. Over the next year, this alignment between motivators and departmental needs is likely to accelerate adoption and drive measurable ROI.

Top Motivators to Adopt AI-powered Analytics

Decision-making and efficiency top Germany's AI+BI priorities



Improve decision-making

46%



Enhance operational efficiency

41%



Empower frontline workers

35%



Reduce costs

35%



Fulfill board or executive mandate

30%

Table of Contents

- 1 [Executive Summary.](#)
- 2 [Key Takeaways](#)
- 3 [AI+BI Maturity.](#)
- 4 [Motivators & Winners](#)
- 5 [Automation & Access](#)
- 6 [Agents & Bots](#)
- 7 [Scaling Plans](#)
- 8 [Challenges](#)
- 9 [Pfizer: SMART Global Analytics](#)
- 10 [Schwarz IT: Powering Global Retail](#)
- 11 [Conclusion](#)
- 12 [Research Methodology.](#)

Automation & Access

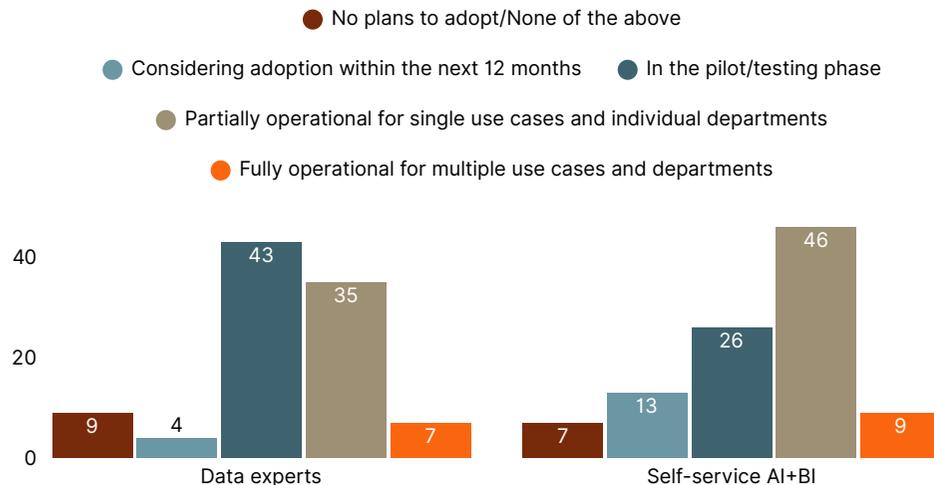
German organizations are pursuing two main AI+BI adoption paths: automating workflows for technical experts and providing self-service capabilities for non-technical staff. The latter is advancing more quickly, reflecting a push to democratize access to insights.

Automating expert workflows streamlines repetitive work, allowing data teams to shift focus from dashboard creation to high-value analysis.

Self-service tools let business users ask questions directly, using natural language and auto-generated visuals to explore insights on demand.

Pilots and adopters

Self-service adoption outpaces automation for experts in Germany (responses in %)



Use Case 1: Data Experts

For technical teams, AI+BI helps eliminate manual steps in the analytics pipeline—from data prep and wrangling to dashboard delivery. In 2025:

- **42%** have at least one AI-automated workflow in production
- while another **43%** are piloting AI+BI to automate data expert workflows.



Use Case 2: Self-Service

By enabling natural language queries and guided visualizations, AI-powered analytics empowers frontline users to explore data without needing SQL or training.

- **54%** enable data access without relying on technical teams
- **26%** are piloting solutions that provide frontline teams with tools to ask questions in plain language.

Table of Contents

- 1 [Executive Summary](#)
- 2 [Key Takeaways](#)
- 3 [AI+BI Maturity](#)
- 4 [Motivators & Winners](#)
- 5 [Automation & Access](#)
- 6 [Agents & Bots](#)
- 7 [Scaling Plans](#)
- 8 [Challenges](#)
- 9 [Pfizer: SMART Global Analytics](#)
- 10 [Schwarz IT: Powering Global Retail](#)
- 11 [Conclusion](#)
- 12 [Research Methodology](#)

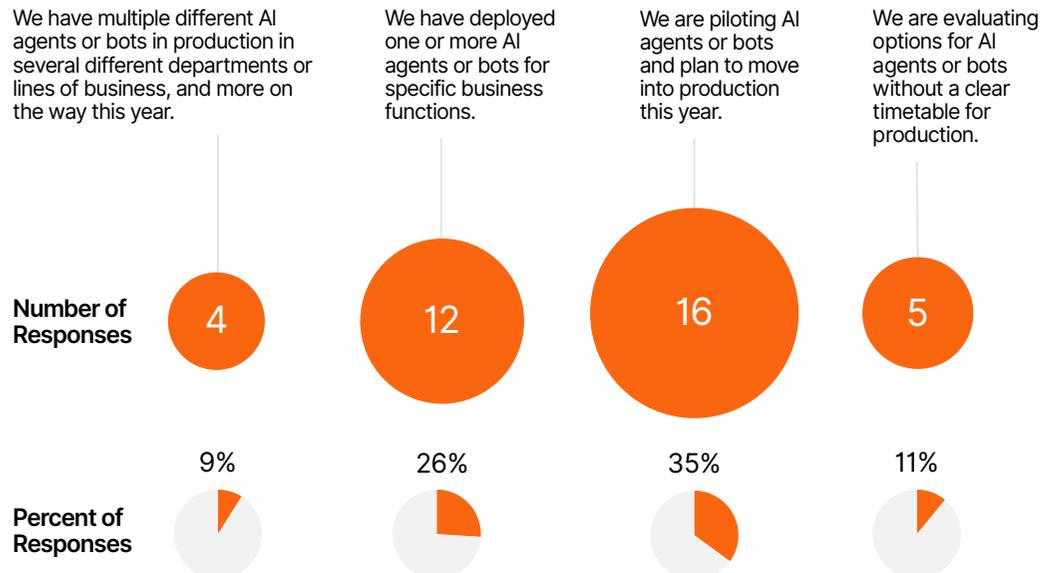
Agents & Bots

AI+BI agents and bots are emerging as a popular way to bring analytics directly into daily workflows. In Germany, over a third of organizations have deployed agents in production, while many others are piloting them for broader use.

The most advanced adopters run multiple agents across functions, from finance to operations. As these tools mature, they are expected to become a cornerstone of user-friendly, real-time analytics delivery.

AI Agents in Use

A third of German organizations run AI+BI agents today



Embedded Insights

Embedding analytics into applications employees already use—such as Office 365 or CRM platforms—removes friction and boosts adoption.

For example, HyperIntelligence surfaces key customer or operational metrics directly within documents or email. This reduces the need for users to log into separate BI tools, speeding time to insight.

Early adopters in Germany report higher engagement when insights appear in the flow of work.

Table of Contents

1	Executive Summary.
2	Key Takeaways
3	AI+BI Maturity.
4	Motivators & Winners
5	Automation & Access
6	Agents & Bots
7	Scaling Plans
8	Challenges
9	Pfizer: SMART Global Analytics
10	Schwarz IT: Powering Global Retail
11	Conclusion
12	Research Methodology.

Scaling Plans

German organizations are preparing to extend AI-powered analytics access beyond specialist teams, aiming to make insights part of everyday business operations. This expansion reflects growing confidence in the technology's usability and value.

Today: None of the surveyed organizations currently provide interactive AI-powered analytics to over 21% of their workforce.

12 Months Ahead: Over one-third plan to surpass that threshold, with leading adopters targeting 31% or more.

Anticipated Wins

Top expected outcomes from AI-powered analytics in Germany:



Greater
workforce
productivity

43%



Enhanced
customer
satisfaction

37%



Improved
decision-
making

30%

By expanding access to more employees, leaders aim to embed analytics into day-to-day decision-making, while maintaining compliance, making it a natural part of the operational rhythm rather than a specialist activity.

Anticipated Expansion

German enterprises plan sharp expansion of AI+BI access to more of their global workforce (% of global workforces with access to AI+BI).

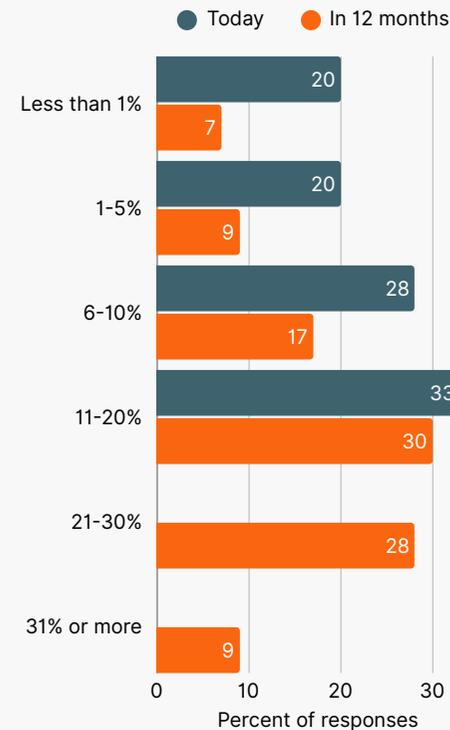


Table of Contents

- 1 [Executive Summary](#)
- 2 [Key Takeaways](#)
- 3 [AI+BI Maturity](#)
- 4 [Motivators & Winners](#)
- 5 [Automation & Access](#)
- 6 [Agents & Bots](#)
- 7 [Scaling Plans](#)
- 8 [Challenges](#)
- 9 [Pfizer: SMART Global Analytics](#)
- 10 [Schwarz IT: Powering Global Retail](#)
- 11 [Conclusion](#)
- 12 [Research Methodology](#)

Challenges

As AI-powered analytics adoption expands, German organizations face a combination of compliance, cost, and technical challenges. Regulatory requirements are the top concern, reflecting the country's stringent data protection standards. Technical hurdles such as inconsistent answers and open-loop systems also pose barriers, particularly where governance frameworks are not yet in place.



Compliance Concerns

Meeting regulatory and policy requirements are top of mind for **63%** of respondents.



High Costs

46% report cost challenges, including high implementation expenses and unclear ROI.



Inconsistent Answers

Concerns around incorrect answers and hallucinations is slowing adoption for **43%** of organizations.

Addressing these issues will require stronger governance and better semantic data layers.



Operational Hurdles

When asked about technical and operational points of friction:

33%

of German organizations report insufficient integrations and limited interoperability, which hinders seamless analytics

33%

cite confusion with GenAI for what differentiates AI-powered analytics vs general-purpose GenAI and large language models

Table of Contents

1	Executive Summary
2	Key Takeaways
3	AI+BI Maturity
4	Motivators & Winners
5	Automation & Access
6	Agents & Bots
7	Scaling Plans
8	Challenges
9	Pfizer: SMART Global Analytics
10	Schwarz IT: Powering Global Retail
11	Conclusion
12	Research Methodology

Pfizer: Empowering a SMART Global Workforce

Pfizer is a leading global biopharmaceutical company, operating 37 manufacturing sites and a distribution network spanning approximately 200 countries, serving millions of patients worldwide.

Challenge & Solution

Pfizer set out to unify its analytics processes and reporting tools into a single, governed solution accessible to every market. By standardizing KPIs, streamlining reporting, and aligning definitions, the company aimed to accelerate decision-making and improve consistency.

Partnering with Strategy, Pfizer:

- Built SMART International, a unified analytics product delivering real-time, governed insights tens of thousands field representatives.
- Standardized KPI definitions and measurement processes globally, enabling consistent performance tracking.
- Automated reporting and embedded self-service analytics, reducing manual effort and accelerating decision-making.

“

The value behind the Strategy platform is that it's all based on a governed semantic layer. It allows us to scale global reporting solutions across 27 markets, 6 business units, and thousands of customer-facing colleagues worldwide.

Joseph Simrany, Director of Integrated Insights and Strategy, Pfizer
[Find out more >>](#)

Impact

Global Consistency

SMART apps and HyperIntelligence deliver uniform KPIs worldwide.

Faster Decisions

AI-powered insights speed actions across teams and markets.

Scalable Reach

Deployed across 27 markets and 6 business units, serving tens of thousands of employees.

Table of Contents

1	Executive Summary
2	Key Takeaways
3	AI+BI Maturity
4	Motivators & Winners
5	Automation & Access
6	Agents & Bots
7	Scaling Plans
8	Challenges
9	Pfizer: SMART Global Analytics
10	Schwarz IT: Powering Global Retail
11	Conclusion
12	Research Methodology

Schwarz IT: Powering Global Retail with Deep Data Analytics

The Schwarz Group is a Germany-based multinational, family-owned retailer operating over 12,000 supermarkets, hypermarkets, and discount stores under the Lidl and Kaufland brands. Schwarz IT, its corporate technology team, delivers enterprise data solutions used by tens of thousands of colleagues.

Challenge & Solution

Schwarz IT needed to unify reporting systems, modernize user experiences, and enable analytics access everywhere across its retail value chain to maintain its competitive advantage in a sector defined by tight margins. Using Strategy solutions, Schwarz unified disparate data sources into a single version of the truth across multiple global brands and diverse business units. Schwarz IT's enterprise analytics strategy and comprehensive solution suite enabled:

- Consolidated reporting into globally standardized metrics and common KPIs.
- Delivered mobile-friendly, cloud-powered analytics to users worldwide.
- Modernized apps and UX for faster, easier access to insights.
- Enabled self-service BI to empower decision-making across all levels.

“

We have redefined the role of data and analytics for our business—it's now the absolute core for our strategy.

Torben Wolf

Managing Director of Process Management Purchasing
Kaufland International

[Find out more >>](#)

Impact

Global Standardization

One source of truth across 30+ countries and multiple brands

Faster Decisions

Real-time access to trusted insights for tens of thousands of users

Retail Excellence

Data-driven operations driving competitive pricing and category performance

30+

countries served with standardized, cloud-powered analytics across the Schwarz Group

Table of Contents

1	Executive Summary
2	Key Takeaways
3	AI+BI Maturity
4	Motivators & Winners
5	Automation & Access
6	Agents & Bots
7	Scaling Plans
8	Challenges
9	Pfizer: SMART Global Analytics
10	Schwarz IT: Powering Global Retail
11	Conclusion
12	Research Methodology

Conclusion

AI-powered analytics in Germany is transitioning from experimentation to operational impact across multiple industries. The most successful adopters combine innovation with disciplined governance, ensuring compliance without sacrificing agility. As capabilities mature, organizations that expand access strategically, invest in literacy, and embed analytics into core workflows will be best positioned to capture sustained value.

What distinguishes leaders:

- They tie analytics programs directly to department-level goals for clear ROI.
- Maintain a robust semantic data layer to deliver consistent, trusted outputs.
- Expand user access alongside targeted training to build organization-wide competency.
- Integrate AI+BI into the tools employees use daily to maximize adoption.

“*AI+BI is no longer an innovation experiment.
It's a core business capability.*”

What to Expect Next

In the next 12 months, German organizations will:

- Increase AI-powered analytics access to larger portions of their workforce.
- Advance automation for both technical and non-technical workflows.
- Broaden the use of natural-language and embedded analytics.
- Strengthen sovereign AI strategies to mitigate vendor lock-in risks.

Table of Contents

1	Executive Summary.
2	Key Takeaways
3	AI+BI Maturity.
4	Motivators & Winners
5	Automation & Access
6	Agents & Bots
7	Scaling Plans
8	Challenges
9	Pfizer: SMART Global Analytics
10	Schwarz IT: Powering Global Retail
11	Conclusion
12	Research Methodology.

Research Methodology

This report is based on the 2025 global survey on AI-powered analytics, conducted by an independent research firm, Dúnedain Research.

- **Survey size:** 235 organizations worldwide across 38 countries
- **German segment:** 46 organizations
- **Industry mix:** Retail (15%), banking (13%), technology (11%), healthcare (11%), government (9%), and others
- **Organization size:** From under 500 to over 20,000 employees
- **Roles surveyed:** Data leaders, BI practitioners, and senior business stakeholders

Each respondent answered on behalf of their organization. Responses were anonymized and analyzed to uncover adoption trends, motivators, outcomes, and obstacles.

About the Authors

This report was authored by the research team at Dúnedain Research, specialists in enterprise analytics, AI adoption, and data strategy. The lead analyst, Brett Sheppard, has over two decades of experience in business intelligence—including roles as a Gartner analyst and U.S. military data engineer. The team's work has appeared in publications by Gartner, GigaOM, and O'Reilly, and has been cited by outlets such as Businessweek, Wired, and Computerworld. Their mission is to provide actionable, data-driven insight to help organizations navigate the evolving analytics landscape.

Explore more insights from the Global Survey, including regional findings and industry-specific reports, at: strategysoftware.com/survey



Table of Contents

1	Executive Summary
2	Key Takeaways
3	AI+BI Maturity
4	Motivators & Winners
5	Automation & Access
6	Agents & Bots
7	Scaling Plans
8	Challenges
9	Pfizer: SMART Global Analytics
10	Schwarz IT: Powering Global Retail
11	Conclusion
12	Research Methodology