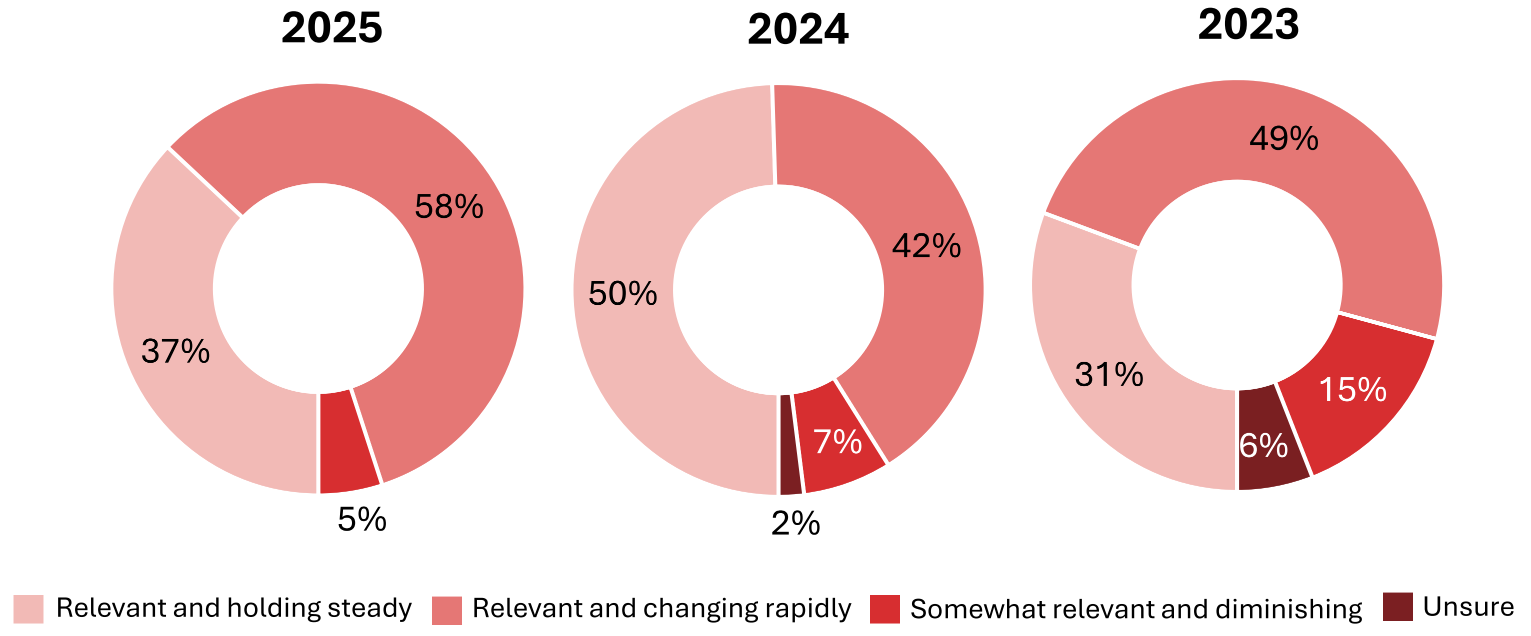
State of the Channel 2025
DACH (English)

Global Technology Industry Association

Most Channel Firms Report Optimism About the Year Ahead – But With Caveats

Assessment of State of Channel Health and Relevance



The channel's prevailing outlook for the year ahead is positive. For example, 58% described the channel as "healthy and changing rapidly," a 14% increase over last year. This group is embracing growth and emerging techs like AI. Another 37% characterized the channel as "relevant and holding steady," indicating stability without explosive growth. Takeaway? DACH's channel is much more bullish about 2025 prospects and growth than last year.

Notably for the channel, the largest bucket of spending for the last two years has been on IT services. Gartner says worldwide spending on IT services will reach $1.73T this year, up from $1.59T in 2024. This represents a 9% spending increase year over year. Robust IT services spend is a harbinger of opportunity for the channel, where customers turn for expertise.

Status of Channel's Business Goals

17% Ahead of expectations

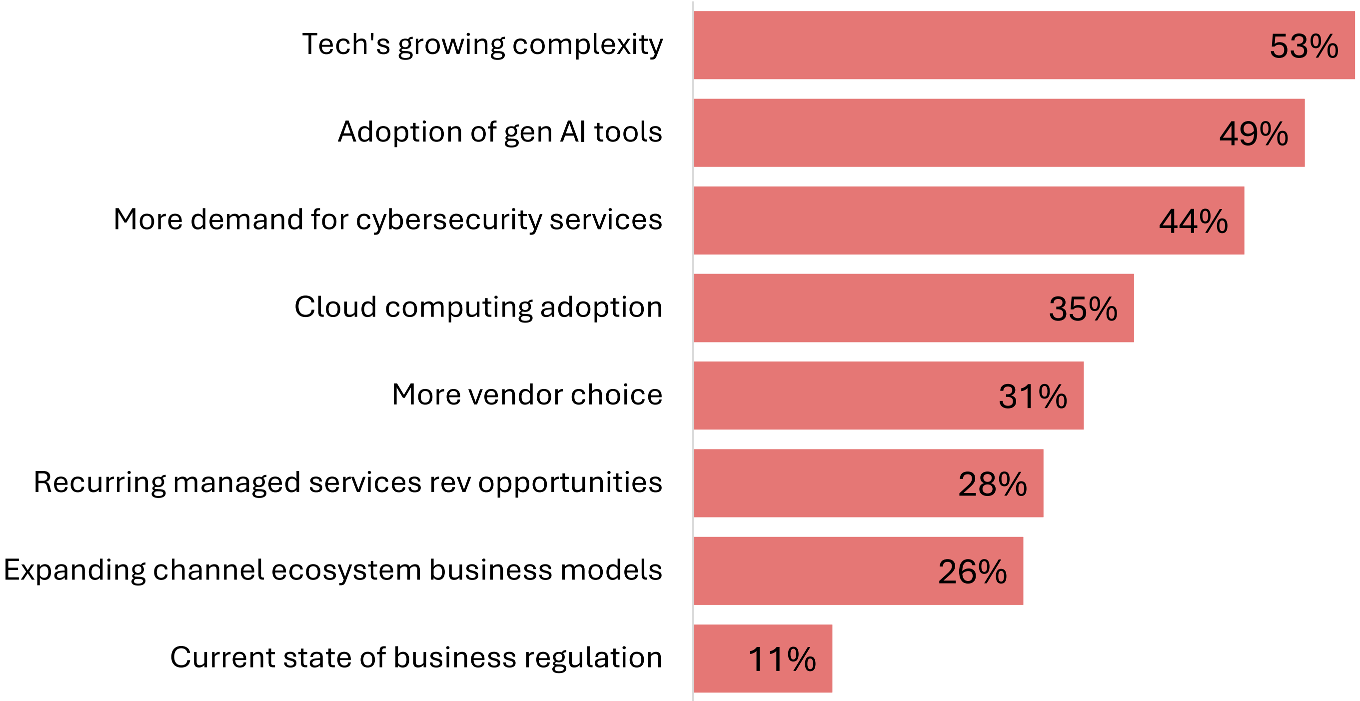
70% On target

9% Lagging slightly

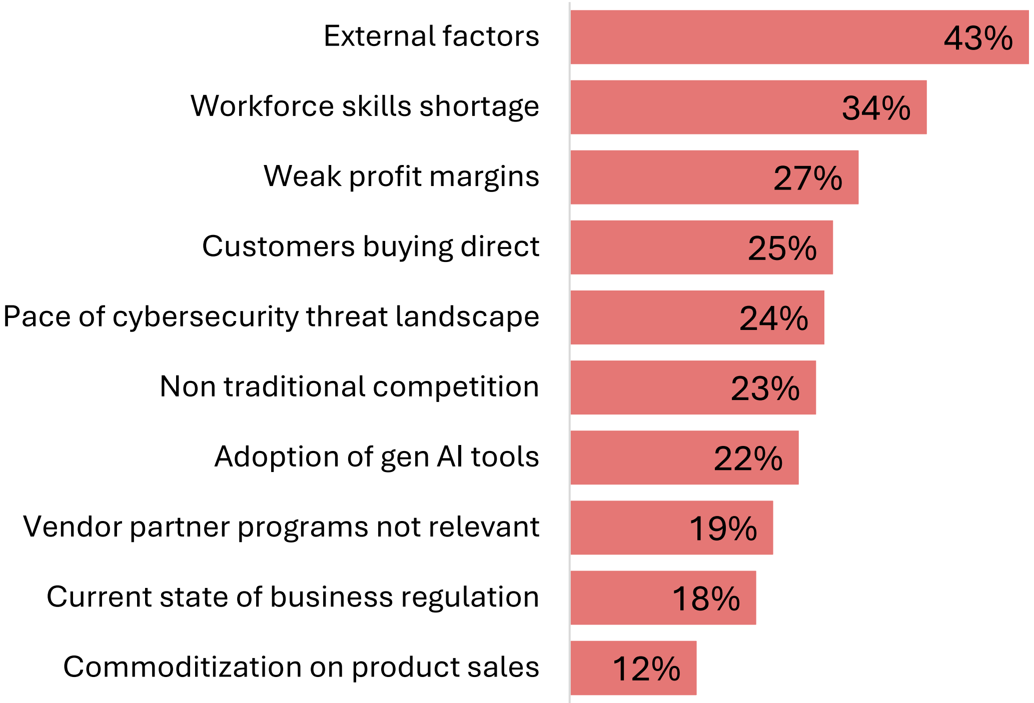
Source: GTIA State of the Channel 2025 DACH survey | n=125
GTIA State of the Channel 2024 DACH survey | n=131
GTIA State of the Channel 2023 DACH survey | n=123

What Channel Firms Say Will Drive or Hinder Business This Year

Factors Contributing to Healthy IT Channel



Factors Inhibiting a Healthy IT Channel

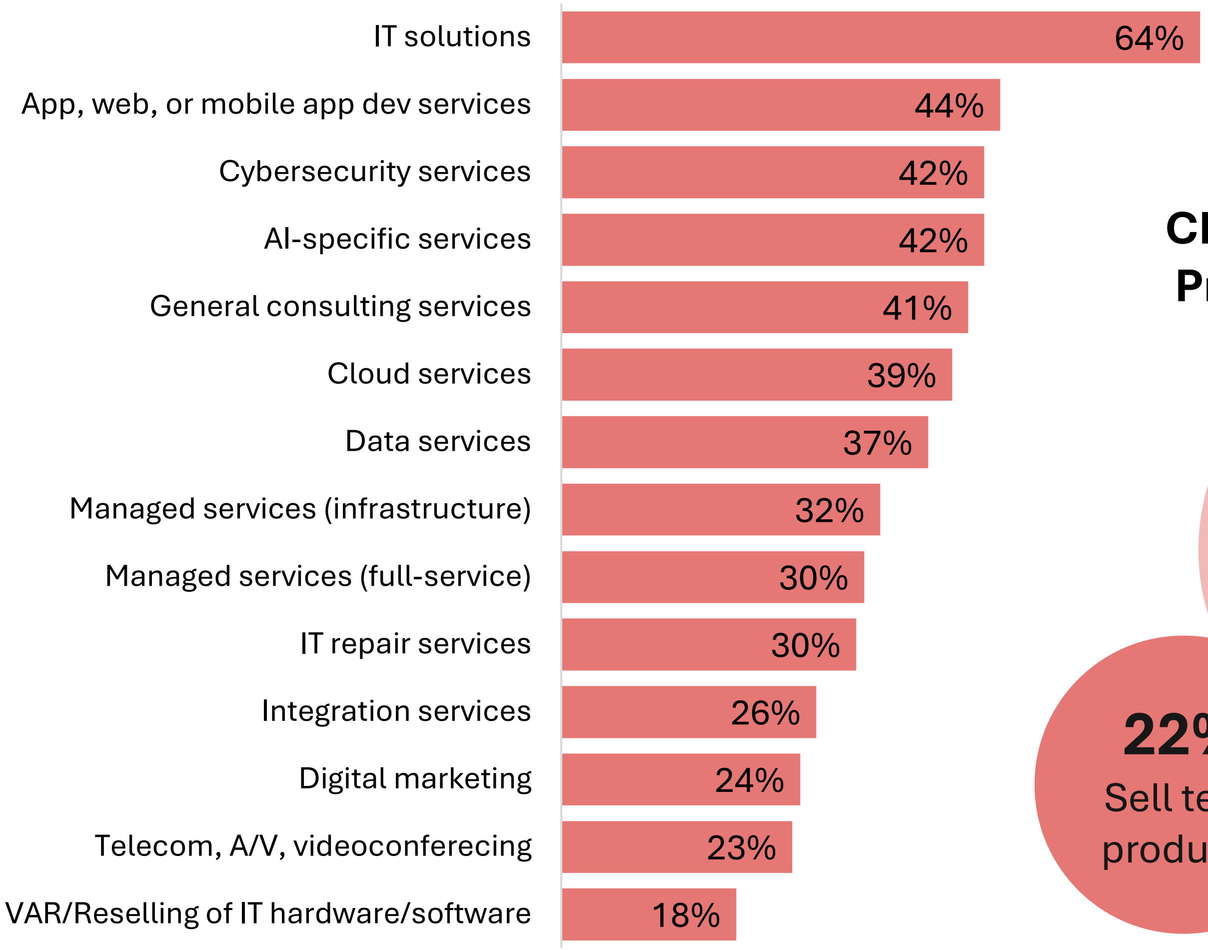


Many in the channel view tech complexity as their friend and cite it as the No. 1 factor driving future positive demand for their expertise. Indeed, customers today are looking for help with everything from developing an AI strategy to ensuring their data is safe to applying technology to broader business goals.

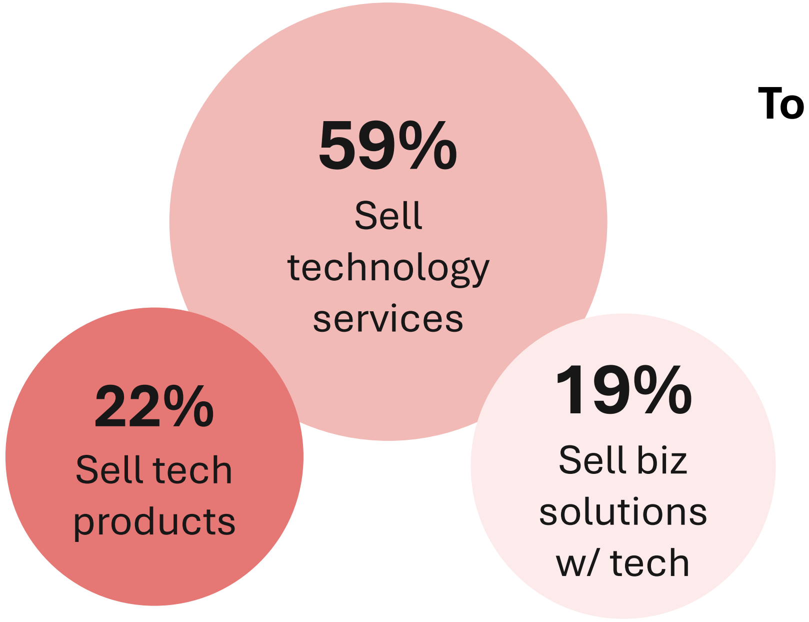
Source: GTIA State of the Channel 2025 DACH survey | n=125

Revenue and Profitability: Where the Channel Sees Growth/Opportunity

Main Portfolio Composition for Today's Channel



Channel Firms Describe Primary Business



Top Revenue Projections

1. AI services
2. Cybersecurity services
3. Integration services
4. Digital marketing

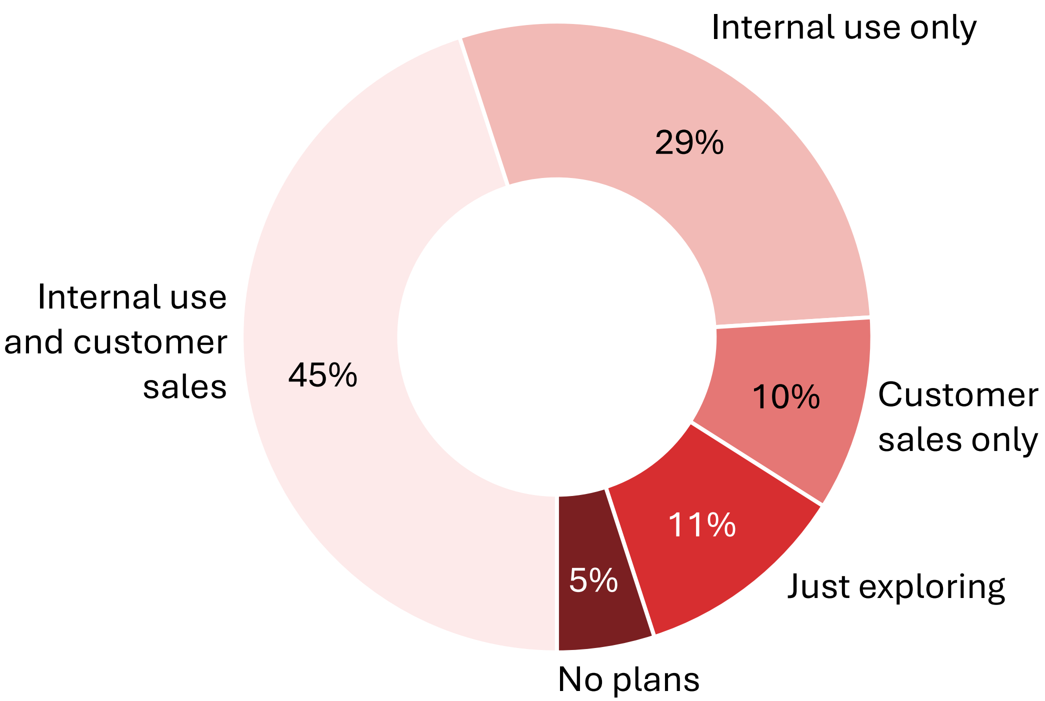
Top Profit Projections

1. Telecom services
2. Cybersecurity services
3. AI services
4. Digital marketing

Source: GTIA State of the Channel 2025 DACH survey | n=125

Artificial Intelligence Gains Ground as an Efficiency Driver for Channel

Company Plans Over Next 12 Months



Motivations for AI Adoption Lean Toward Internal Needs

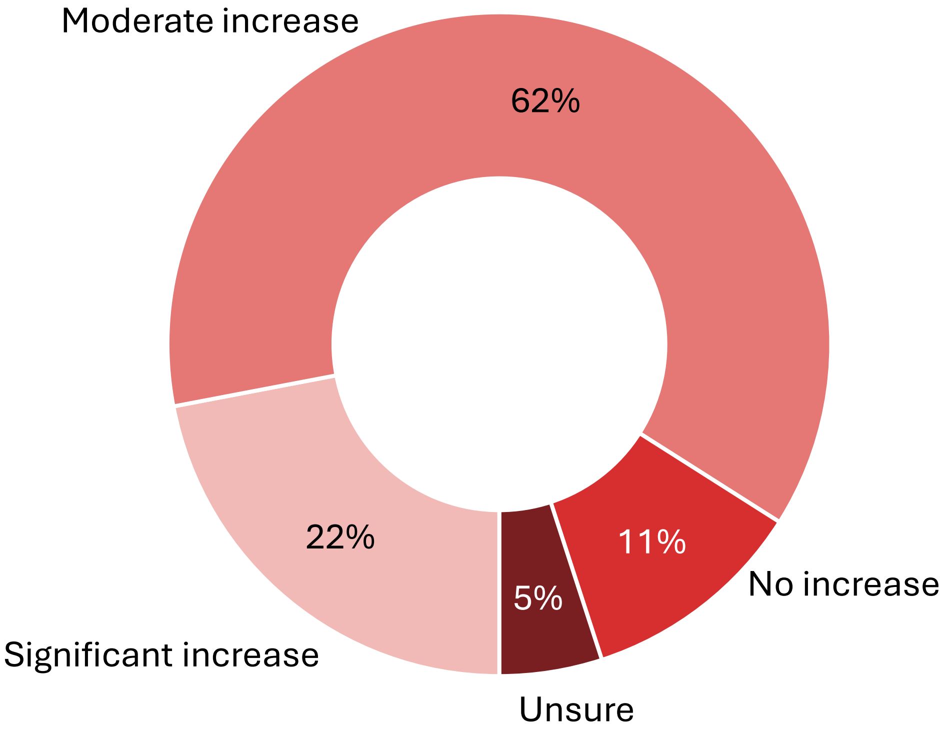
46%	Revenue opportunity
40%	Customer demand has grown
36%	Support workforce
35%	Products AI-enabled
29%	Operational efficiency
29%	Enter new market/vertical

DACH's channel is using AI today mainly in content generation activities (38% of respondents) and automation of internal functions (35%). But the next two most popular uses on the list reflect AI in a revenue-generating role as a data services offering and part of the overall product portfolio.

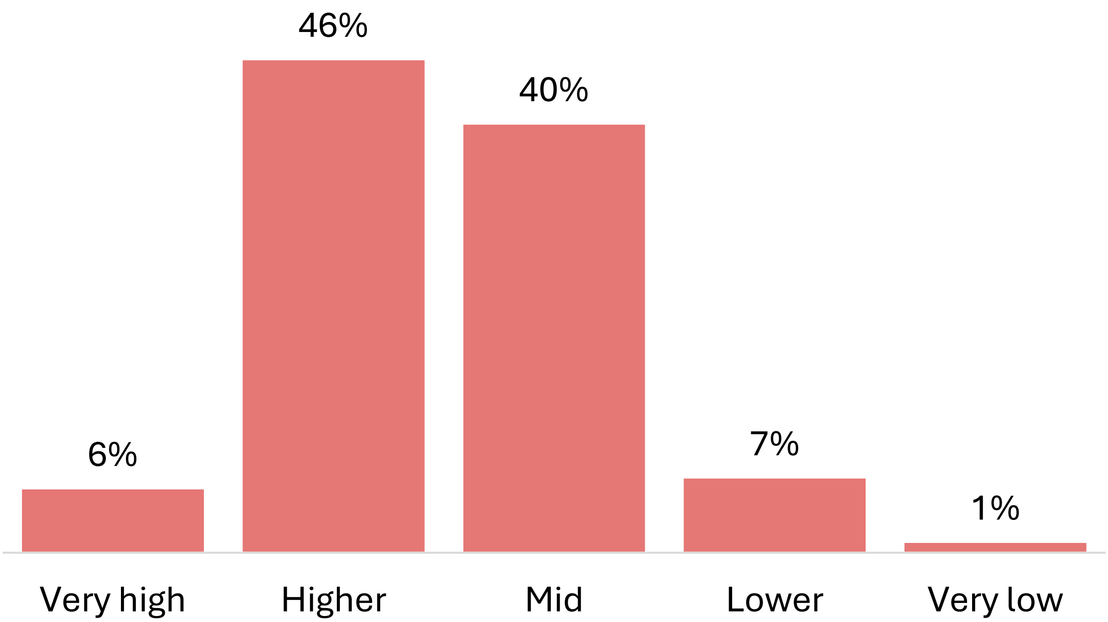
Source: GTIA State of the Channel 2025 DACH survey | n=125
GTIA State of the Channel 2025 DACH survey | n=118

Changing Skills Requirements Keep Workforce Issues Front & Center

Tech Hiring Expectations



Level of Change in Skills Requirements is High Across Cybersecurity, Data, AI

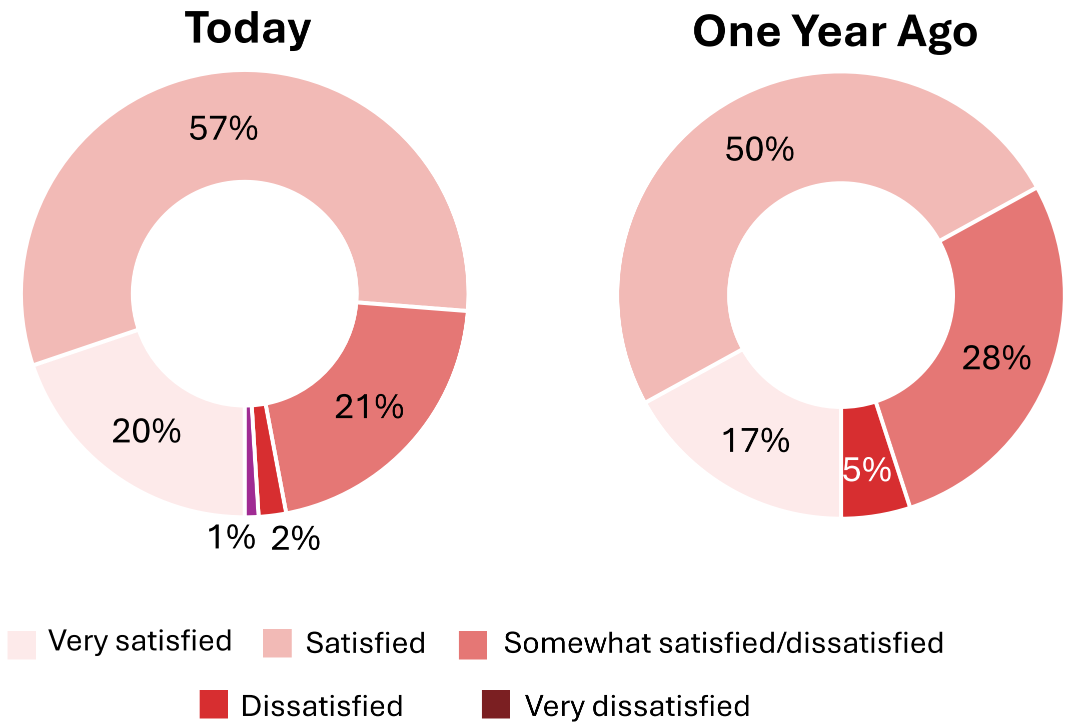


34% of DACH channel firms said workforce skills gap issues is the No. 2 potential inhibitor to a successful year ahead. Companies are mainly addressing the gap through hiring for newly created and existing positions that now require different skills.

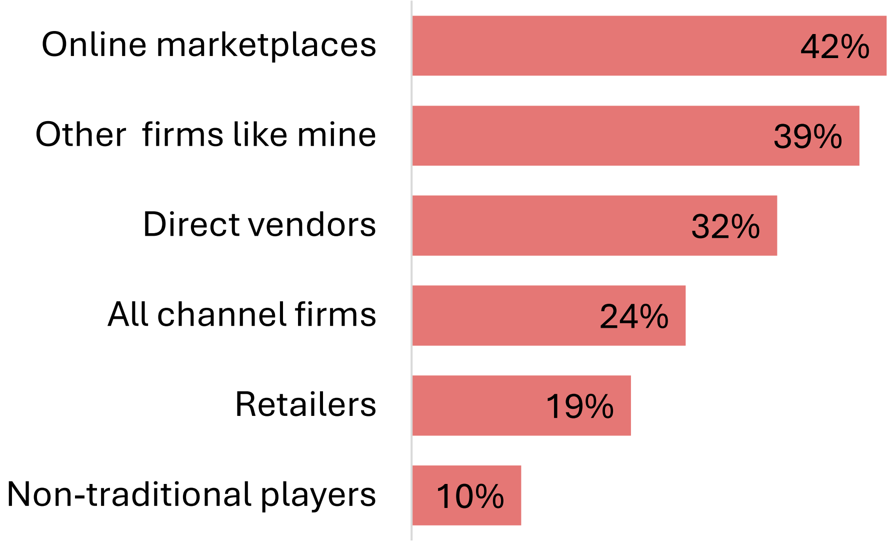
Source: GTIA State of the Channel 2025 DACH survey | n=125

Vendor Sat Remains Steady Despite Continued Issues with Sales Conflict

Channel Assessment of Vendor Relationships



Main Competitors Cited Today



Top Reasons for Changing Vendors

38% Looking to enter new markets

25% Looking for better profitability

22% Poor partner experience

22% Prefer fewer, more strategic vendors

Source: GTIA State of the Channel 2025 DACH survey | n=125

Methodology

GTIA's *State of the Channel 2025* study provides insights around key channel trends in business environments.

The quantitative study within the DACH region consisted of an online survey fielded to channel professionals during December 2024. A total of 125 respondents participated in the survey, yielding an overall margin of sampling error at 95% confidence of +/- 8.5 percentage points. Sampling error is larger for subgroups of the data.

As with any survey, sampling error is only one source of possible error. While non-sampling error cannot be accurately calculated, precautionary steps were taken in all phases of the survey design, collection and processing of the data to minimize its influence.

GTIA is responsible for all content and analysis. Any questions regarding the study should be directed to GTIA Research and Market Intelligence staff at research@gtia.org.

GTIA adheres to internationally respected and accepted code of standards and ethics for market research.