

Survey

SMEs under pressure – the opportunities offered by digitalization and automation

 HEIDELBERG

F.A.Z.-INSTITUT

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BUSINESS
MEDIA
research



Introduction

Given the skills and workforce shortage being faced by print shops, Heidelberger Druckmaschinen AG (HEIDELBERG) wanted to know whether this is a general trend among German SMEs. The answer was surprisingly clear – this is a problem faced by nine out of ten of the German SMEs with fewer than 500 employees that responded to the survey. It is therefore vital to take action.

SMEs have identified a solution – making greater use of digitalization, machines, robots, and artificial intelligence. A campaign to provide workers with the appropriate qualifications is necessary to achieve this. Furthermore, schools and companies that offer training in Germany must prepare future generations for the ever more technical world of work. Unfortunately, this is still too rare at present.

The printing industry can serve as an example for SMEs. Only a small number of sectors in Germany are as highly automated and digitalized. This helps print shops with their growing cost pressures and safeguards production, even when finding staff proves difficult.

HEIDELBERG is therefore continuing its work on automation and digitalization solutions for the printing industry.

We hope you find this presentation enlightening.

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Survey design

Survey design

Method

- **Online survey** (computer-assisted web interview)
- **Survey period:** February 2023
- **Institute conducting survey:** F.A.Z. Business Media | research

Random sample

- **Scope of random sample:** n = 701

Criteria

- **Headcount:** 10 to fewer than 500 employees
- **Position:** Decision-makers at companies (see statistics for sub-categories)
- **Sectors:** Construction, energy supply, automotive manufacturing/suppliers, financial and insurance services, real estate and housing, information and communication, consumer goods, mechanical engineering, miscellaneous services, miscellaneous manufacturing (see statistics for sub-categories)

Summary

Summary



SMEs have some work to do when it comes to digitalization

- 91% of SME respondents regard digitalization and automation as key locational factors.
- Around half of the companies rate themselves as digitally (very) advanced.
- On the other hand, seven out of ten respondents rate the digitalization of the German economy as moderate at best.
- Automation and digitalization offer potential for the companies:
 - 81% identify digitalization as a big opportunity or more of an opportunity (than a challenge).
 - 71% identify automation in this way.
- A lack of digitalization (18%) and a lack of automation (12%) are mostly ranked toward the bottom of the list of problem areas, though.
- The more pressing problems facing German SMEs are acute challenges such as the skills and workforce shortage (50%), high raw material and energy prices (37%), and too much bureaucracy (31%).

n = 701; sources: Heidelberger Druckmaschinen; F.A.Z. Institute; F.A.Z. Business Media | research

Summary



Technology expected to help with staff shortages

- 92% of respondents say they are affected by the skills and workforce shortage.
- Half of the companies are even (very) badly hit.
- The respondents see digital transformation as a means of reducing staff shortages.
 - Three-quarters regard the digitalization of processes as (very) effective for this purpose.
 - Two-thirds rate artificial intelligence as a (very) effective tool.
- Industry in particular sees automation as an answer to the skills and workforce shortage.

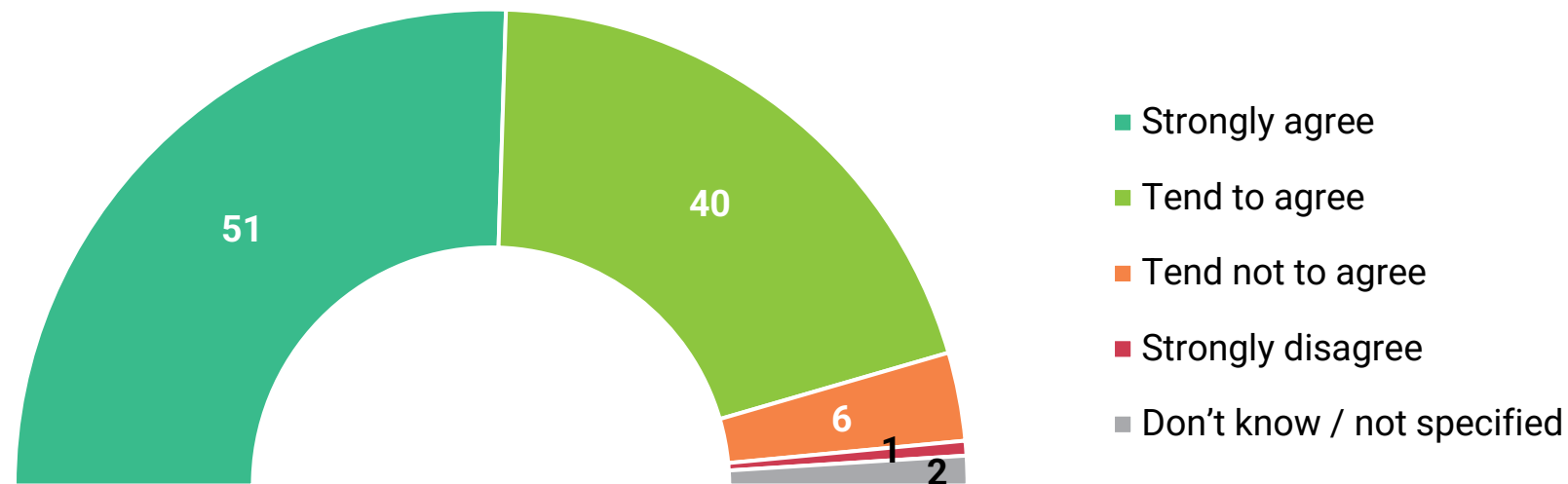
Measures to combat staff shortages	Manufacturing sector (n = 275)	Service sector (n = 426)
Automation using machinery (e.g. filling lines)	67%	55 %
Use of industrial and service robots	58%	45%

n = 701; sources: Heidelberger Druckmaschinen; F.A.Z. Institute; F.A.Z. Business Media | research

Results

As a major industrial location, Germany needs digital and automated processes for the future

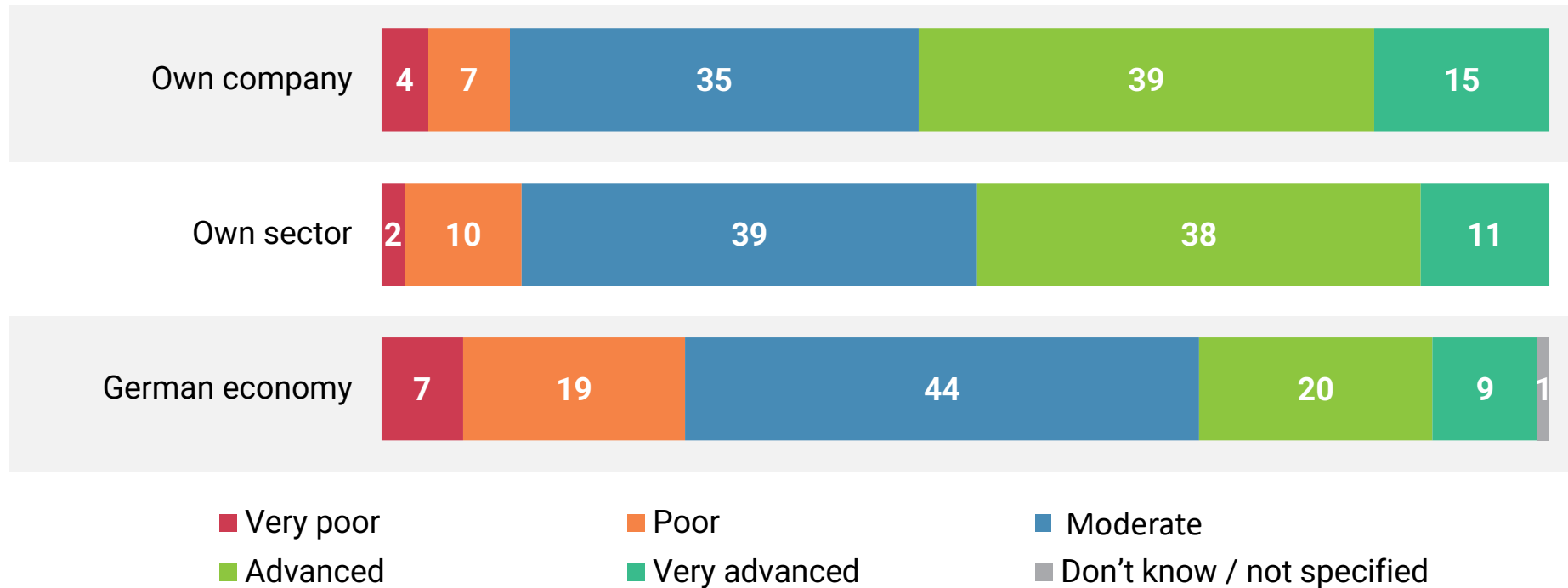
“Without digitalization and without automation, the German economy is not competitive.”



As a percentage of the respondents; n = 701;
sources: Heidelberger Druckmaschinen; F.A.Z. Institute; F.A.Z. Business Media | research

The German economy has some work to do in terms of digitalization – seven out of ten respondents rate it as moderate at best

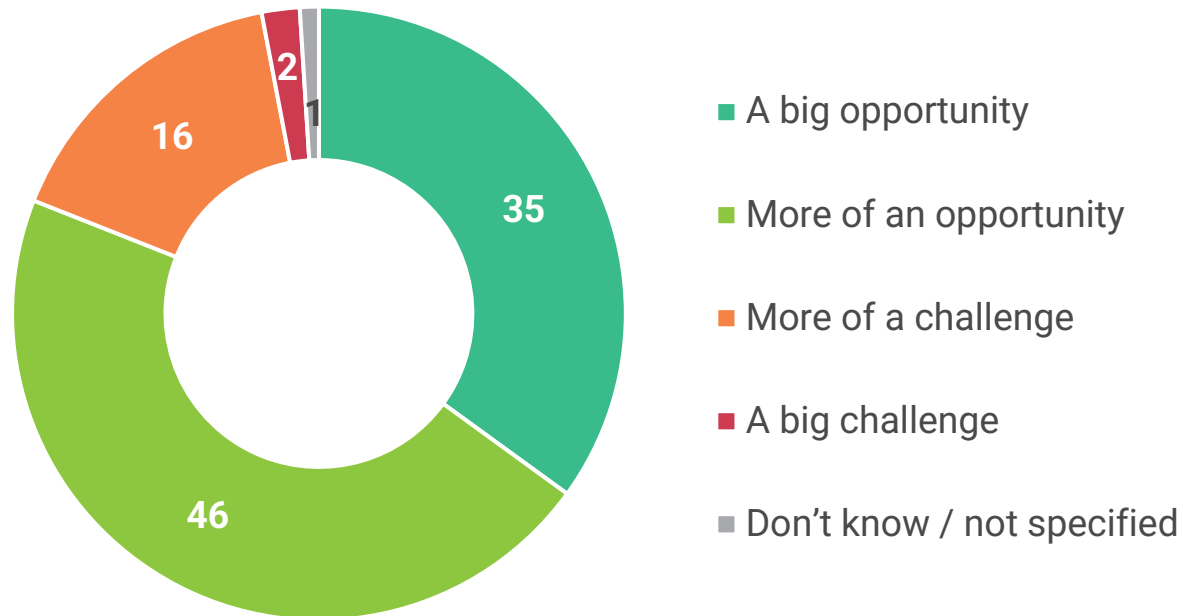
How do you rate the current level of digitalization in the following areas?



As a percentage of the respondents; n = 701;
sources: Heidelberger Druckmaschinen; F.A.Z. Institute; F.A.Z. Business Media | research

Around four out of five respondents see (great) potential in the digital transformation of their company

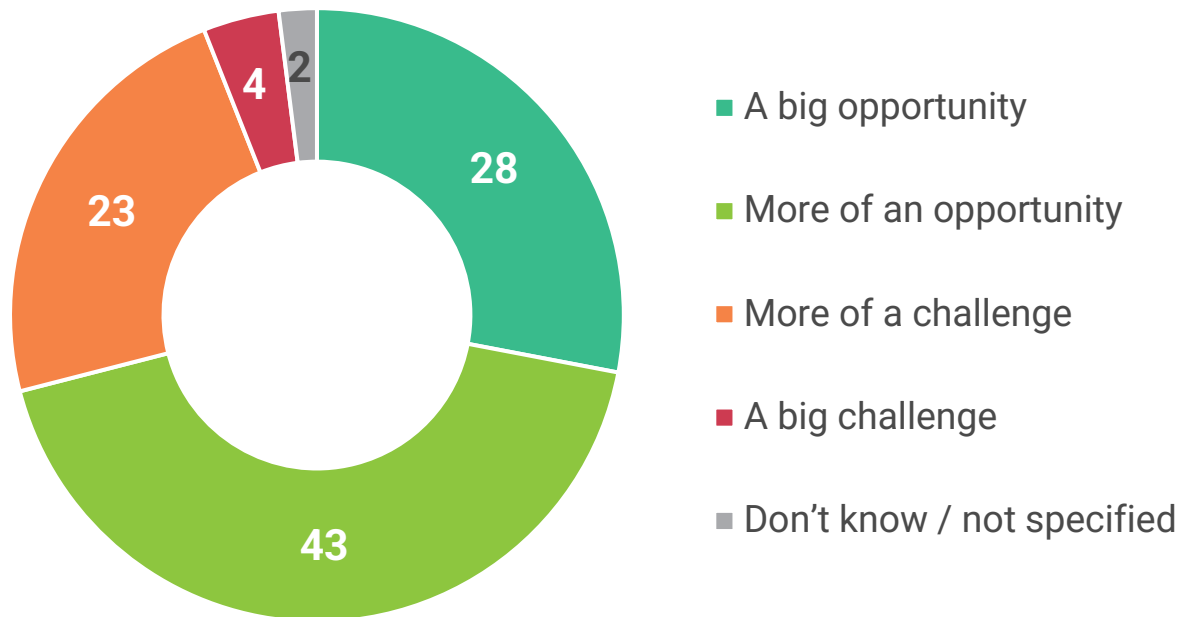
Is digitalization an opportunity or a challenge for your company?



As a percentage of the respondents; n = 701;
sources: Heidelberger Druckmaschinen; F.A.Z. Institute; F.A.Z. Business Media | research

The vast majority of companies have a positive attitude to automation, but around a quarter anticipate difficulties making the switch

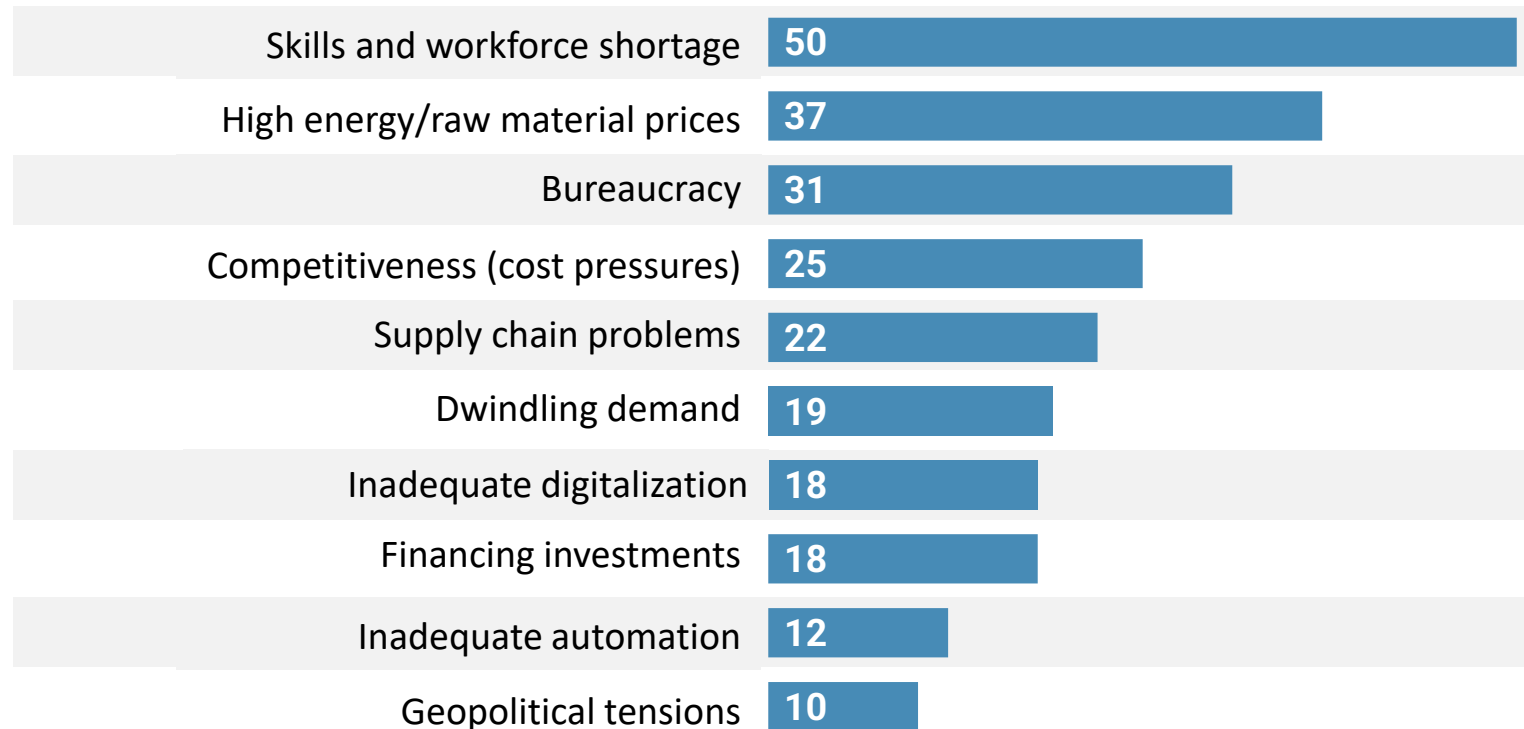
Is automation an opportunity or a challenge for your company?



As a percentage of the respondents; n = 701;
sources: Heidelberger Druckmaschinen; F.A.Z. Institute; F.A.Z. Business Media | research

SMEs face a variety of challenges

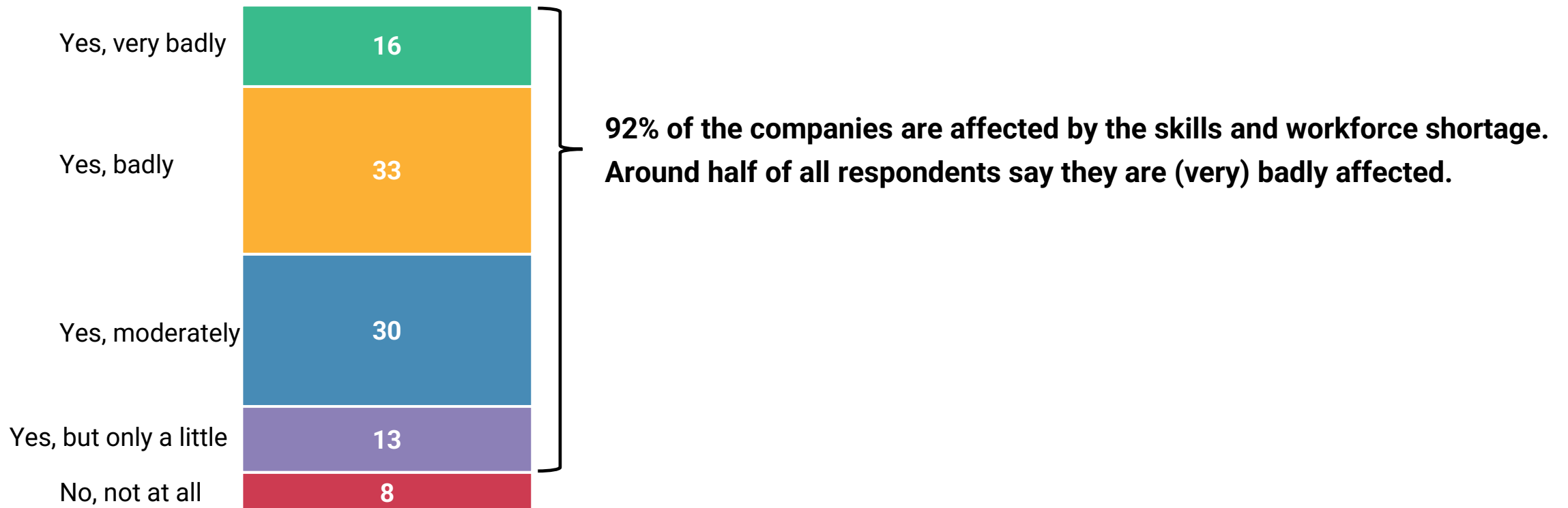
What are the most pressing problems for your company at present?



More than one answer possible; as a percentage of the respondents; n = 701;
shown excluding the answers "We have none of these problems" (5%) and "Don't know / not specified" (1%);
sources: Heidelberger Druckmaschinen; F.A.Z. Institut; F.A.Z. Business Media | research

Nine out of ten SMEs have a shortage of staff

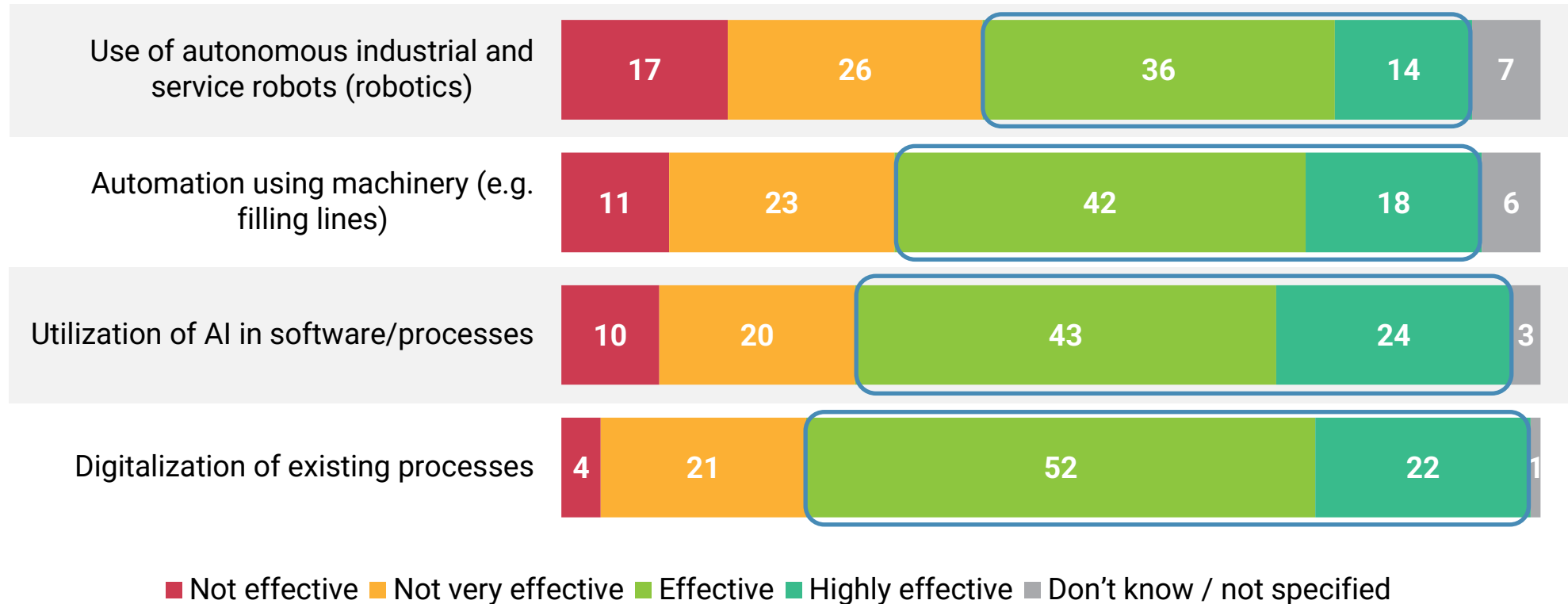
Is your company affected by the skills and workforce shortage?



As a percentage of the respondents; n = 701;
sources: Heidelberger Druckmaschinen; F.A.Z. Institute; F.A.Z. Business Media | research

Technology is an effective response to the skills and workforce shortage

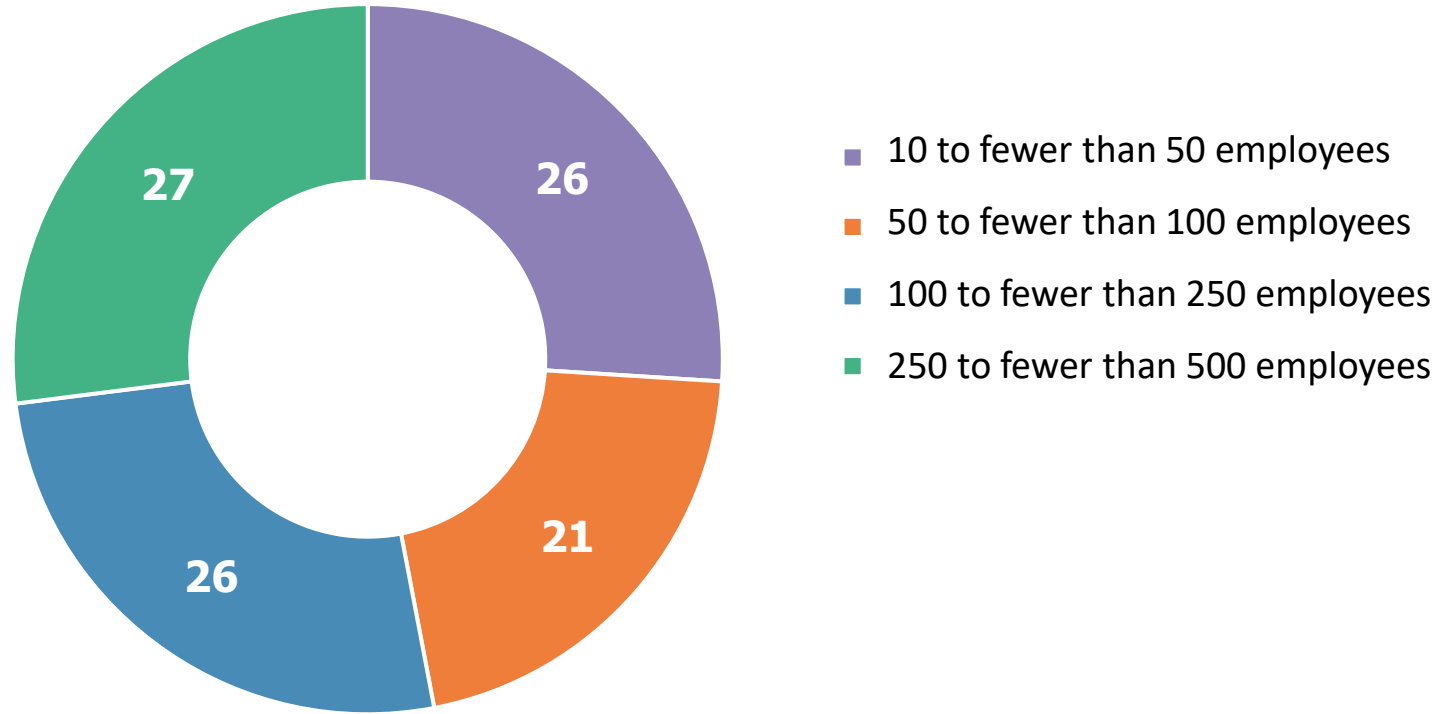
How effective do you consider the following measures to be at present in minimizing staff shortages at your company?



As a percentage of the respondents; n = 701;
 sources: Heidelberger Druckmaschinen; F.A.Z. Institute; F.A.Z. Business Media | research

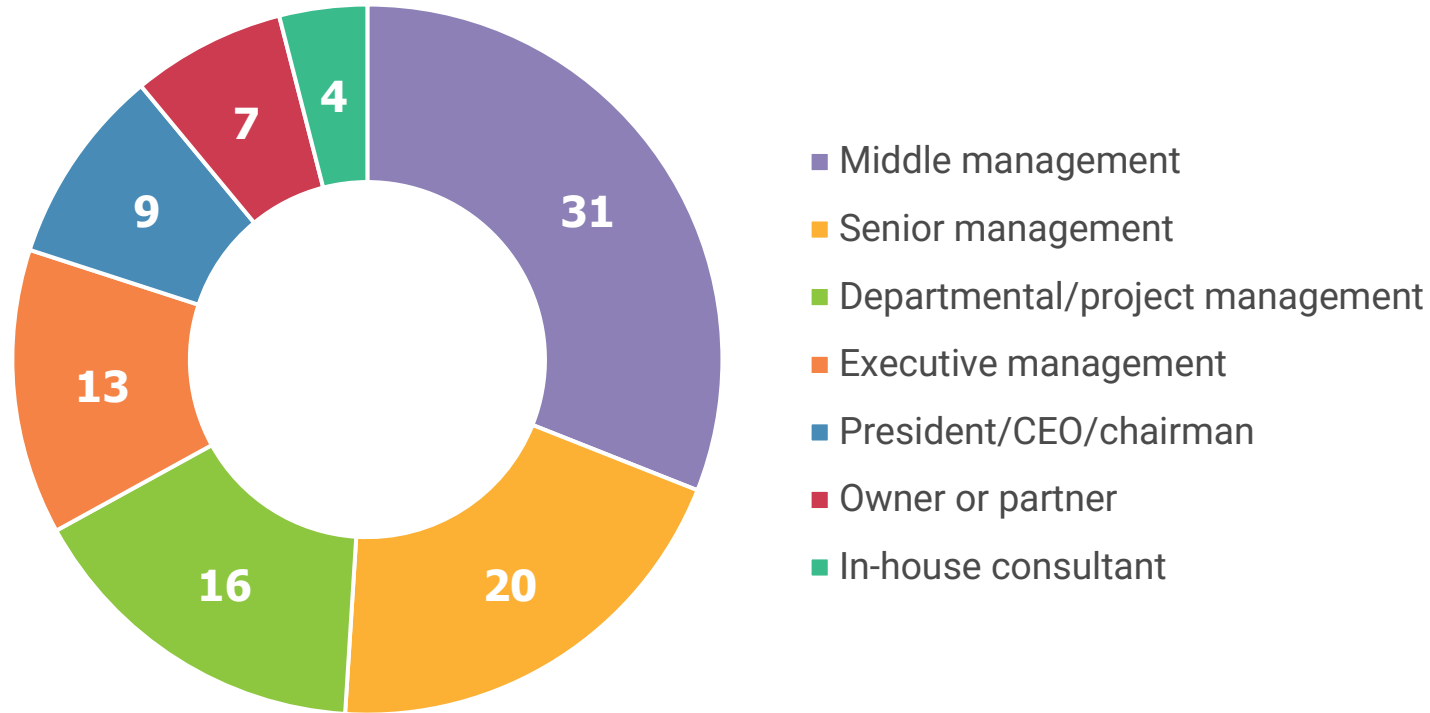
Statistics about the respondents

Headcount



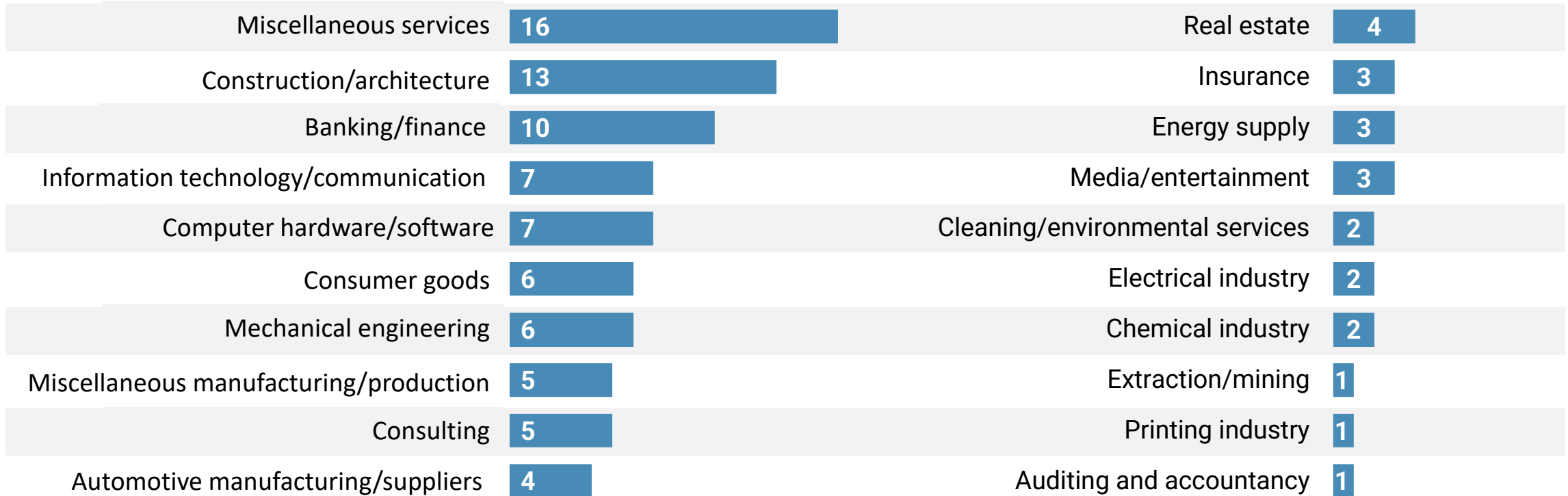
As a percentage of the respondents; n = 701;
sources: Heidelberger Druckmaschinen; F.A.Z. Institute; F.A.Z. Business Media | research

Position at the company



As a percentage of the respondents; n = 701;
sources: Heidelberger Druckmaschinen; F.A.Z. Institute; F.A.Z. Business Media | research

Industry classification



As a percentage of the respondents; n = 701;

sources: Heidelberger Druckmaschinen; F.A.Z. Institute; F.A.Z. Business Media | research

[Heidelberger Druckmaschinen AG](#) offers cutting-edge, networked, and highly automated machinery, robotics systems, control software, and cloud solutions for print shops. Assistance systems with in-built artificial intelligence can be used to automate processes, even to the extent of implementing autonomous printing. B2B platforms for consumables and service parts, software for controlling the entire workflow in the printing process, and Internet-based remote diagnoses for machine maintenance are also included in the portfolio.

The [F.A.Z. Institute](#) offers a range of networking services comprising large and small events, specialist publications, and studies. Examples for the community of marketing and communication decision-makers include the prestigious German Brand Summit and the quarterly magazine “>kommunikationsmanager”. The information and networking platforms of “Initiative Verantwortung” – a network for economic, political, and social decision-makers – range from the Diversity Summit and the Responsible Leadership Conference to the quarterly magazine “Verantwortung”. The Innovative Leaders conference is a recently launched new format focusing on innovations that extend across multiple sectors and companies.

[F.A.Z. BUSINESS MEDIA |research](#) is the independent partner for research in the F.A.Z. specialist publishing house. We use scientific methods to collect high-quality, original data for our customers. B2B is our main focal point, but we also have many years of experience with B2C, employee surveys, and reader surveys. Our surveys provide the basis for effective content in the digital age. We process the results for specific target groups in a variety of formats agreed with our customers. If requested, we also provide complementary journalistic and subject-specific content along with the survey results.

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