



The Innovation Imperative: Unlocking Business Potential with Intel-powered AI PCs

Introduction

Businesses are already well-versed in the productivity gains that AI delivers for tasks like search optimization or language translation. Consumed as a cloud service, this type of day-to-day AI use is driving adoption. But for businesses looking to extend IT efficiency, better protect sensitive data, and reduce long-term costs, AI PCs are fast becoming the go-to option.

In fact, there's already a significant shift towards the adoption of AI PCs, with **87%** of global businesses transitioning or planning their **transition to AI PCs**. This was the finding of an Intel commissioned survey conducted with over **5,000 business** and IT decision makers from organizations across 23 markets in North and South America, Asia-Pacific, Europe, and the Middle East and Africa. We wanted to uncover perceptions about AI PCs and gauge business understanding of the potential that AI PCs can bring.

What is an AI PC?

AI PCs are devices with specialized hardware—a central processing unit (CPU), graphics processing unit (GPU), and integrated neural processing unit (NPU)—specifically designed to power AI applications and enable AI use cases faster, efficiently, and more securely.



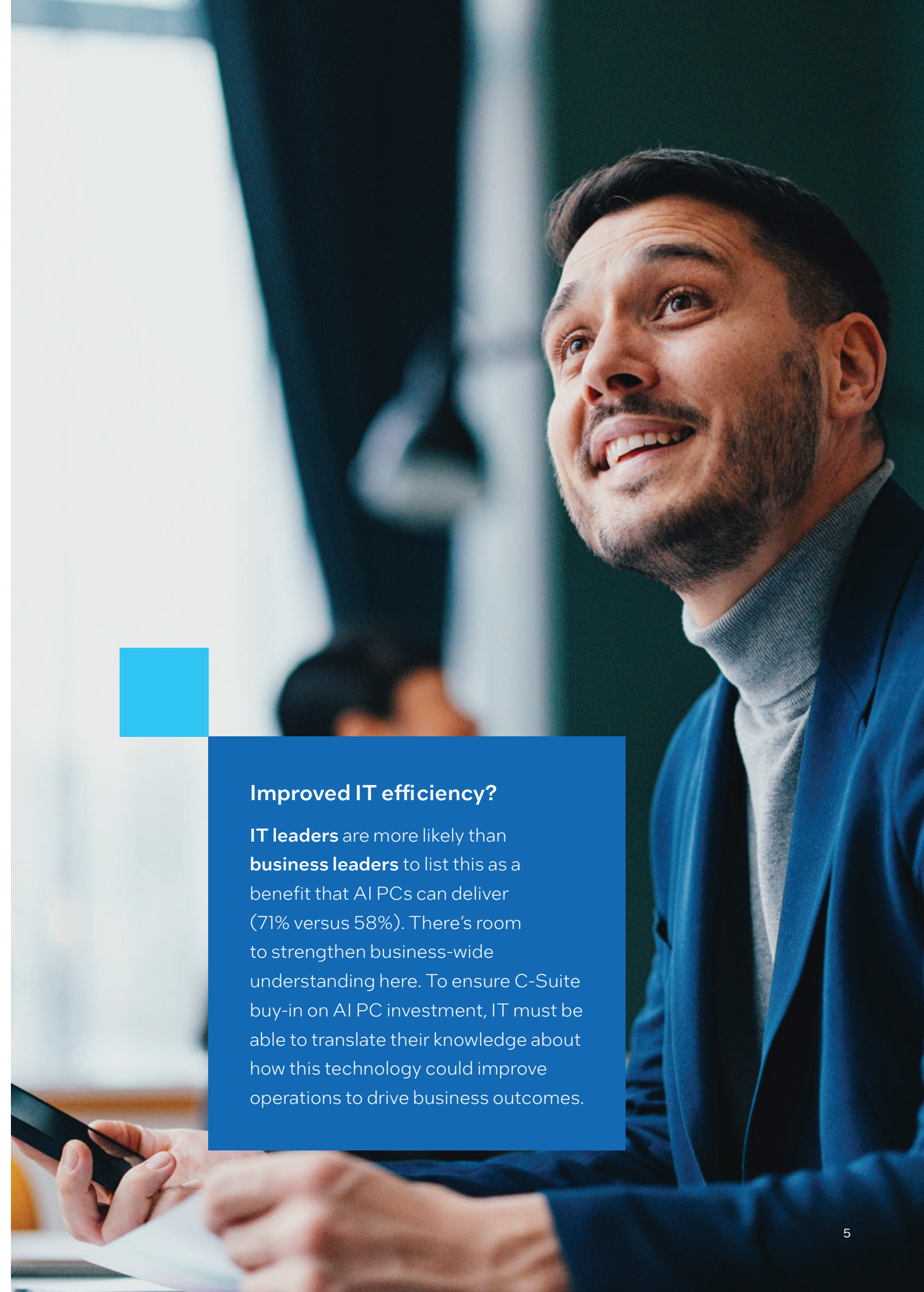
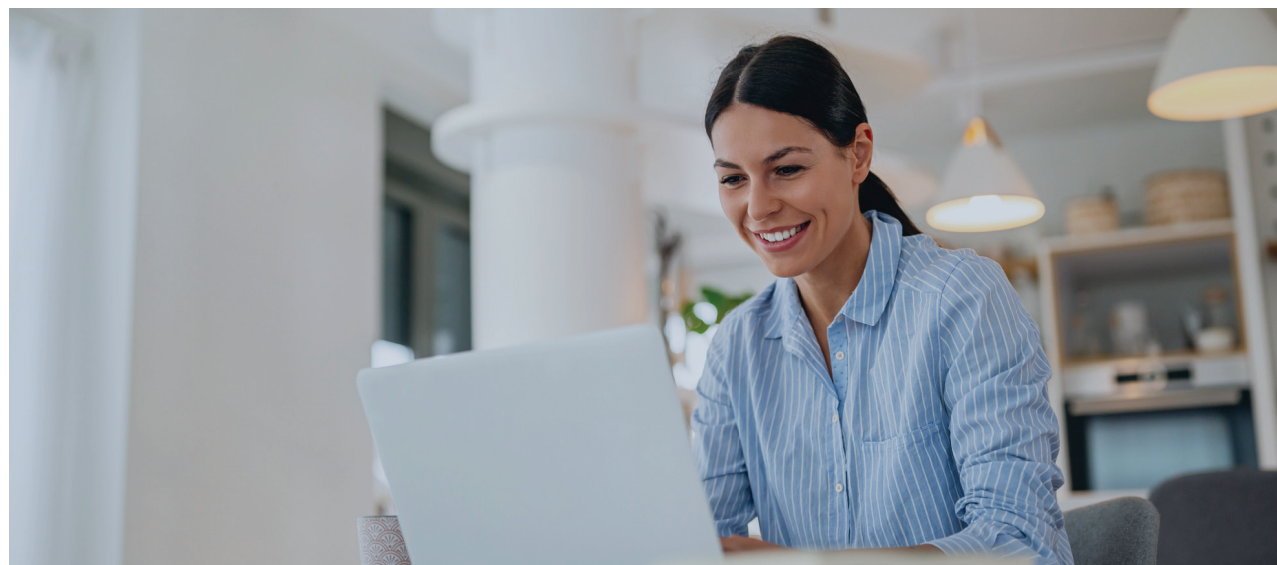
Recognizing the scope of the AI opportunity

AI is already revolutionizing the way people work. Whether it's used as a cloud-based service or installed as software locally, AI has many applications that organizations are frequently tapping into. The most common use cases include:

- **Optimized search:** 73% are using AI to speed up access to data, looking to improve their searches for files, documents, and images.
- **Real-time translation:** 72% of the respondents are turning to AI for instant language translations of both verbal and written communications.
- **Predictive text input:** 71% rely on AI for predictive text features, looking to speed up their typing outputs while reducing errors.

The global business community believes AI PCs in particular can deliver several AI-enabled benefits to their organizations:

- **90% cited increased workforce productivity**—and nearly half (48%) believe this will be a substantial increase.
- **92% recognize the link between AI PCs and innovation**, with the technology supporting the development of new products, services, and revenue streams.
- **90% acknowledge the customer-insights power of AI PCs**, which can bolster their organization's understanding of consumer needs.



Improved IT efficiency?

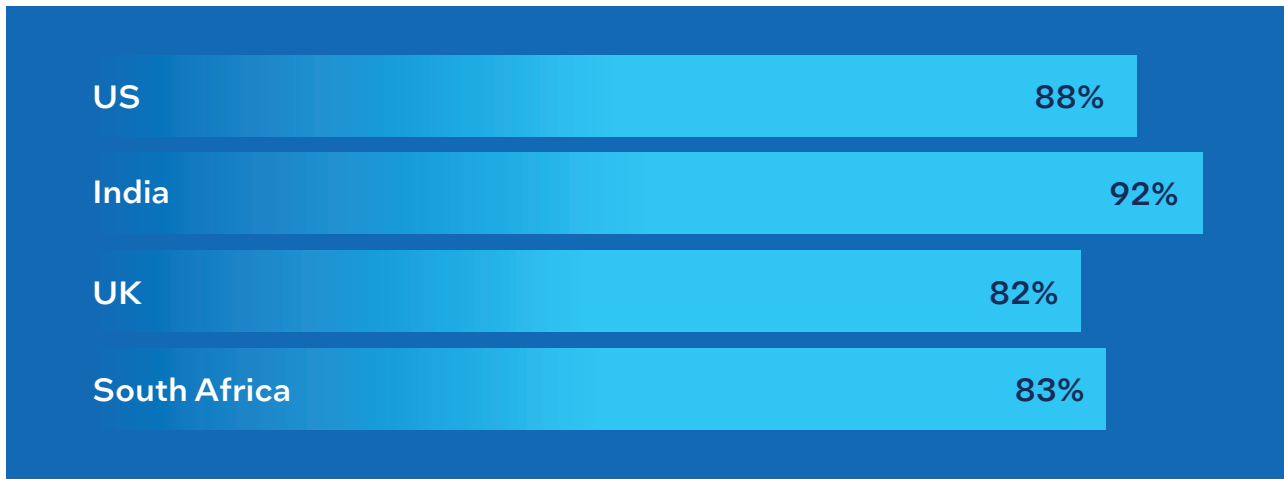
IT leaders are more likely than **business leaders** to list this as a benefit that AI PCs can deliver (71% versus 58%). There's room to strengthen business-wide understanding here. To ensure C-Suite buy-in on AI PC investment, IT must be able to translate their knowledge about how this technology could improve operations to drive business outcomes.



Growing businesses adoption

Modern enterprises recognize that AI PCs offer an opportunity to extend the scope of AI benefits beyond productivity to business-critical areas like innovation, customer retention and attraction, and more. Subsequently, embedded AI capability was ranked as the top consideration to keep in mind when reviewing PC-upgrade options (46%).

And the number of upgrades to AI PCs is growing, fast. Our research shows that 87% of businesses are either in the process of upgrading or are planning to update within the next modernization cycle. For planned updates, the operating system will be an important factor, meaning we’re likely to see a spike in AI PC uptake later this year, when Windows 10 support stops in favor of the Windows 11 PC refresh. With this milestone on the horizon, familiarity with AI PCs is high across most markets, including:



Of the organizations that have already adopted AI PCs, half say they were motivated by the employee demand for AI tools. Where is the demand coming from? Evidence points to IT, with support from the C-suite.

- Among the **wider employee base**, there’s an education gap around the potential of AI PCs—only 35% of employees are thought to have a concrete understanding of this technology’s business value, so they aren’t likely to be the driving force behind AI PC adoption.
- Conversely, more than half (51%) of **leadership team members** have a firm understanding of the potential AI PCs bring—this is likely to make them more receptive to the idea of investment.

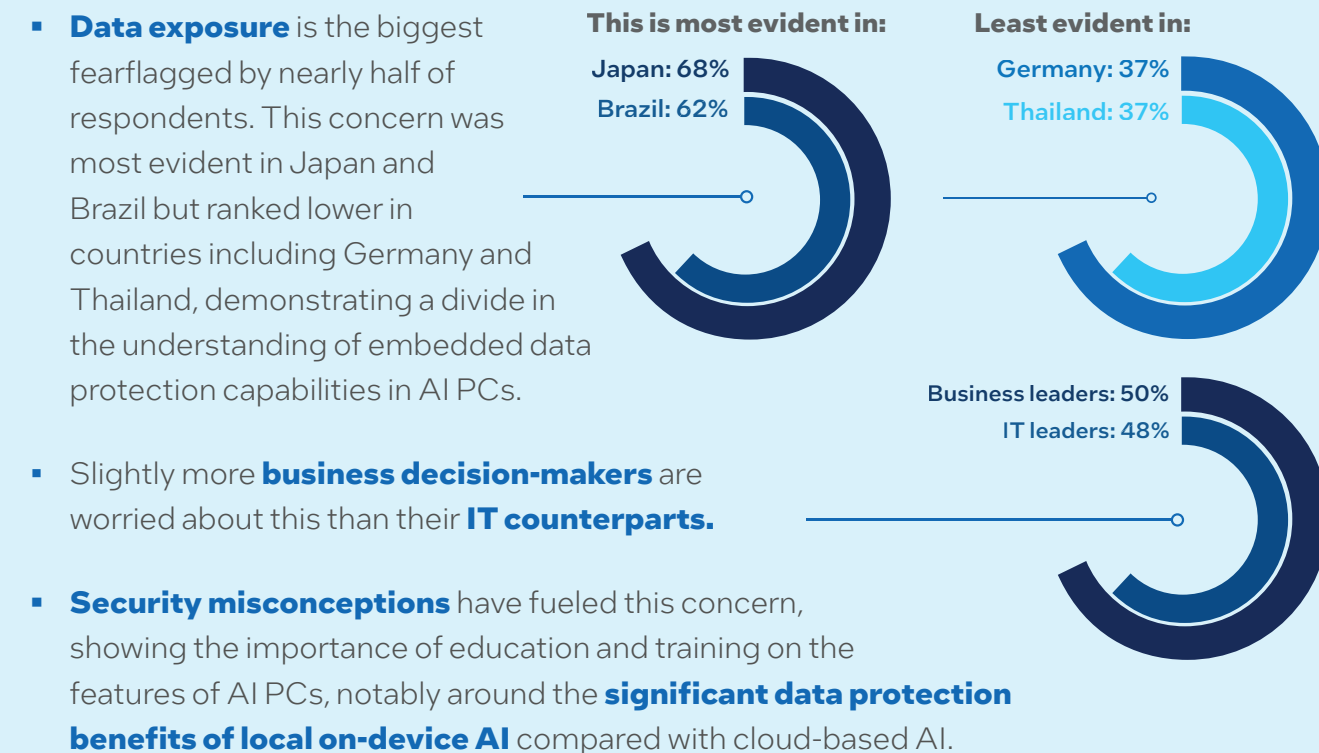


IT decision-makers believe that **41%** of employees and **56%** of the leadership team have a **deep understanding of the value AI PCs can add**.

Business decision makers are less optimistic, estimating the figures at **33%** (of employees) and **50%** (of leadership team members).

Security misconceptions

Despite enthusiasm over the potential of AI PCs, some businesses are still hesitant to adopt the tech. Security tops the list of concerns for 33% of non-adopters, indicating this is the primary barrier holding them back. Our research shows that...



In reality, AI PCs have built-in hardware security features that help detect threats early, protect applications and data, and defend the system even before the operating system starts¹. One of the most powerful advantages of AI PCs is the ability to run AI workloads locally, offline and privately, without sending sensitive data to the cloud.

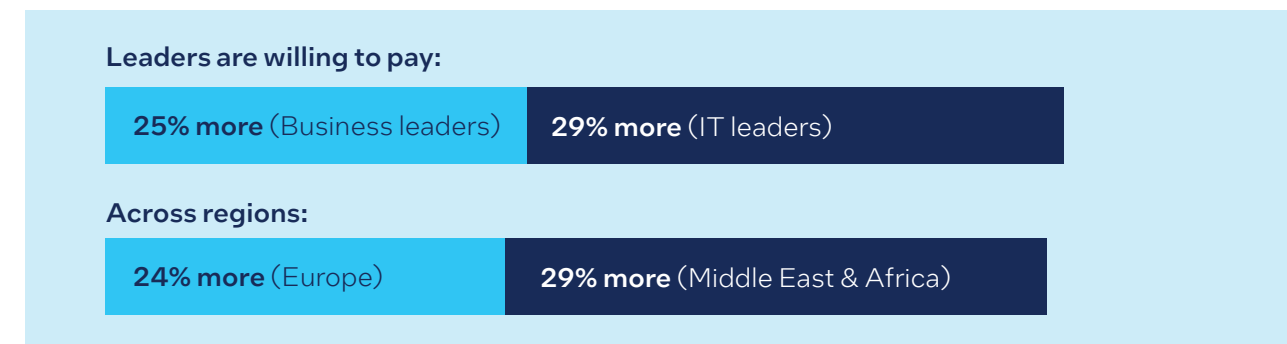
This is especially critical for regulated industries like healthcare, finance, and legal services, where data privacy and compliance are paramount. By keeping data on the device, organizations can reduce exposure risks while still benefiting from real-time AI capabilities such as transcription, summarization, and anomaly detection.

Hearing from adopters versus non-adopters

A third of non-adopters cite security as their biggest AI PC concern. Yet, on the list of challenges faced by those already using the technology, only 23% highlight security. The need for training is the biggest roadblock for adopters—34% of respondents raise this as an issue. Although an equal number (33%) have not experienced any challenges, including security issues, when using AI PCs.

The value of readying for the future

Preparing an organization's technology stack for future demands may bring greater costs—something respondents recognize and accept. Our research shows that, when compared to the cost of a traditional PC:



These findings represent the value of greater power efficiency, performance and security brought with an AI PC. However, 32% and 30% of non-adopters cite upfront cost and ongoing cost respectively as two of the primary barriers (after security) holding them back from taking the AI PC leap. What isn't factored is the high return on investment (ROI), which offsets the initial upfront cost, as well as future cost-saving benefits such as AI's predictive capabilities to empower IT to proactively address maintenance before it becomes an issue. When built on the Intel vPro platform and powered by Intel Core Ultra processors, AI PCs deliver clear ROI²:

- Users will reap **up to 213% ROI** over three years, with one of the biggest most tangible wins being how much time is freed up, so IT can turn their attention to more strategic, higher value tasks.
- Adopters will **spend 65% less time** on device management.
- IT staff can drastically reduce the amount of time spent physically visiting sites to run maintenance interventions—potentially reducing hardware-related on-site visits by **as much as 90%**.
- Furthermore, if a company does experience an outage due to system crashes or security vulnerabilities, businesses leveraging Intel vPro technology can get back up and running in days rather than weeks or months.

Another key factor in readying for the future is the growing ecosystem of Independent Software Vendors (ISVs) that are optimizing their applications for AI PCs. Leading ISVs are already integrating AI features like real-time transcription, intelligent editing, and enhanced collaboration tools that take advantage of on-device AI acceleration. As more ISVs continue to innovate, organizations that invest in AI PCs today will be better positioned to adopt these next-generation capabilities without needing to refresh their hardware.

10 2. Based on "The Total Economic Impact™ of the Intel vPro Platform," an Intel-commissioned study by Forrester Consulting, January 2024, which surveyed 500 ITDMs at enterprises across the world using Intel vPro®, including US, Canada, France, Germany, UK, Australia, China, India, and Japan. For the study's findings, Forrester aggregated the data and experiences from the interviewees into a composite organization with an assumed revenue of \$1 billion per year and 10,000 employees.



Misconceptions on AI PC training

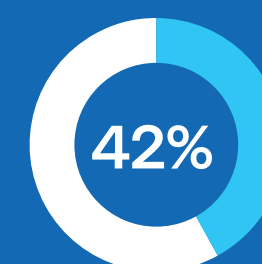
While it's a falsehood that people need a drastically different set of skills to use an AI PC compared with AI on a traditional PC, it is true that employees across the organization may require contextual learning specific to their role and use cases depending on which workloads they're running and what their existing level of AI knowledge is.

Bridging the skills gap

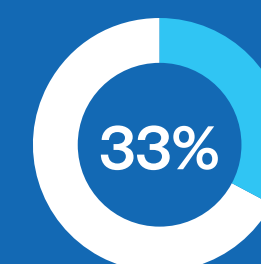
Business won't tap into the ROI of an AI PC if they don't invest in the upskilling of their workforce to bring everyone along on the adoption journey. Without on-the-job learning and consistent usage, organizations may fall short of realizing the full potential of AI PCs. For this reason, those looking to adopt AI PCs recognize the importance of consistent understanding of AI technology across their organizations. Our research shows that:

- Nearly all **IT decision-makers (91%)** and **many business decision-makers (86%)** planned how to tackle their training need ahead of AI PC integration, because they anticipated it would be critical.
- 95% of respondents believe **employees will need some level of training** to effectively use AI PCs—nearly half feel that considerable training is needed.

Is the expressed need for training being met? Our research shows that:



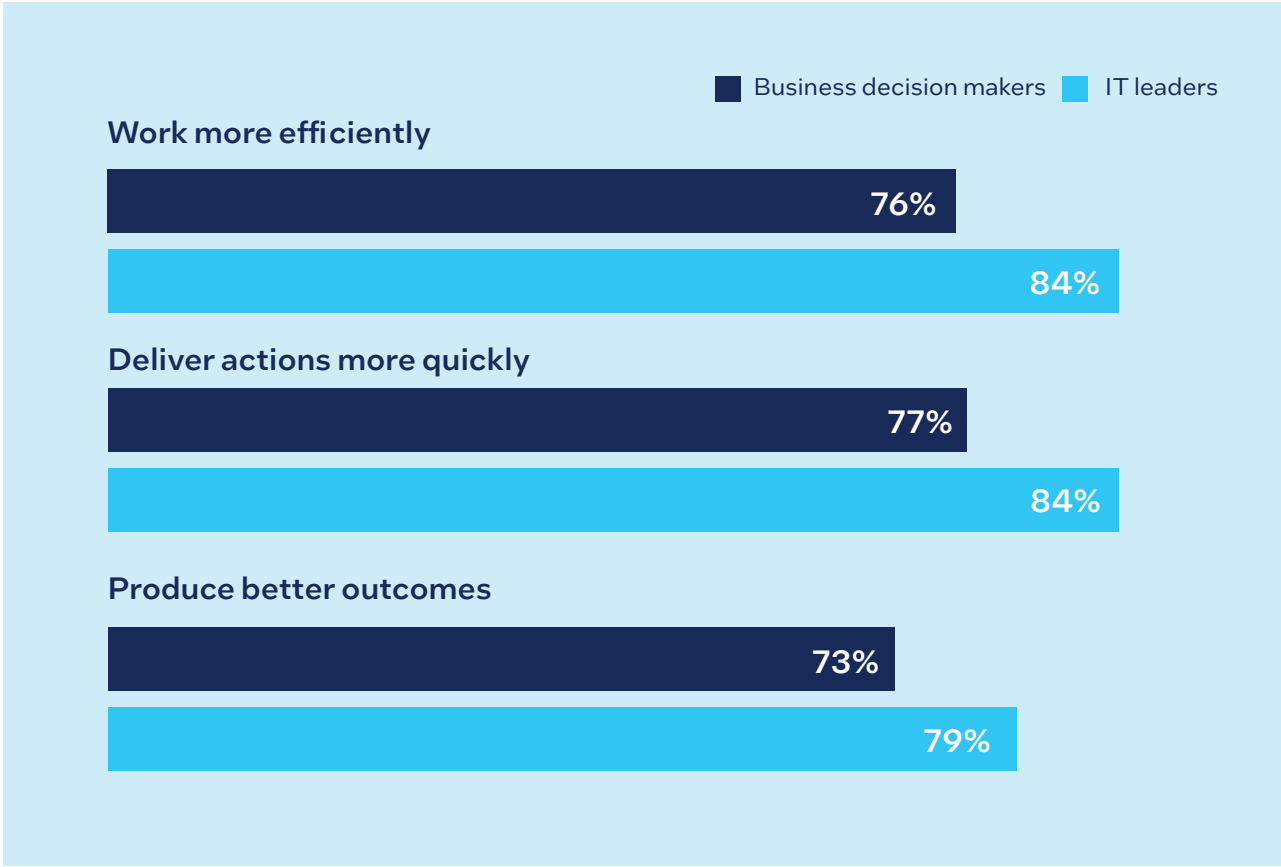
of organizations have an **ongoing AI training series**. This figure should be higher, with all adopters running training to get staff excited and confident.



only do **one-off tool trainings**—this indicates a lack of foresight around the pace of tools evolution. AI training should evolve as the technology does, with continuous learning and development encouraged.

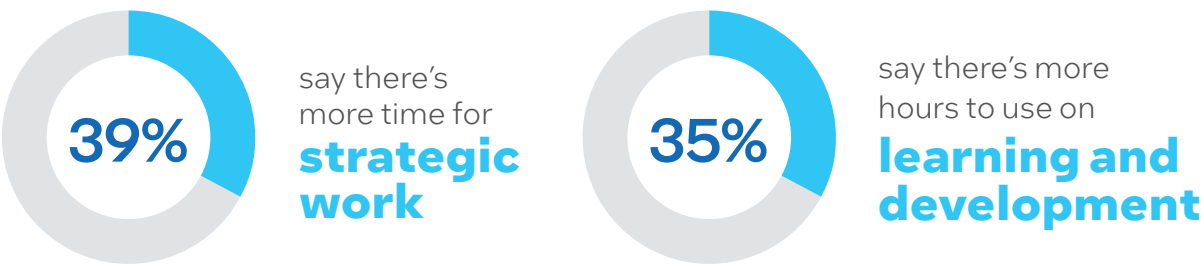


When training isn’t ongoing, or tailored to different skills levels, you risk creating a skills gap. This gap is likely to impact your ROI, especially when expectations are high around what staff output on AI PCs should be. When compared to employees using traditional PCs, those using AI PCs should:



Unleashing AI PC success with Intel

Nearly half of respondents (47%) say that, with the right AI PC technology and skilling in place, employees will be far more efficient—and more professionally fulfilled, too, because:



The ability to double down on strategic initiatives that drive growth and competitiveness is good news for businesses. But it begs the question: what is the *right* AI PC technology to help unleash this potential? Addressing security concerns with cutting edge AI-enabled features, Intel is the AI PC category leader, on track to deliver 100 million accumulative AI PCs by the end of 2025 with Core Ultra as the processor of choice.

Advancements in Intel’s AI PC portfolio include:



Up to 100% performance gains running workloads
on the latest Intel vPro platform when compared with the Intel Core 100U series processors. These workloads include data visualization and insights, content creation, local AI assistance, digital marketing, and more.



thanks to industry-first AI innovations for threat detection.
Deeper data protection



AI acceleration of users’ daily business workflows
thanks to new NPUs and GPUs. These workflows span productivity improvements, expert content creation, business insights, and enhanced collaboration.

Strengthened security posture



with AI analysis better leveraged to prevent sensitive data exfiltration and drive compliant Gen AI interactions.



At Intel, we have guided hundreds of organizations on their AI PC journey, helping them prioritize AI capabilities in their technology strategies, use the platform to revolutionize workflows and enable the kind of smarter decision-making that frees up time for employees who can focus on higher-value tasks that meet business targets. Now is the time to upgrade to AI PCs, ensuring you invest in team training to harness the full potential.

Report methodology

The survey was conducted among 5,050 interviews with business and IT decision makers from organizations in Brazil, Canada, Germany, India, Indonesia, Ireland, Israel, Italy, Japan, Kingdom of Saudi Arabia, Malaysia, Mexico, Poland, Singapore, South Africa, South Korea, Spain, Taiwan, Thailand, United Arab Emirates, United Kingdom, United States of America and Vietnam. The respondents fill different job roles, including owner, C-suite, director, and senior management, working across sectors with IT, technology, and financial services as the most represented.

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