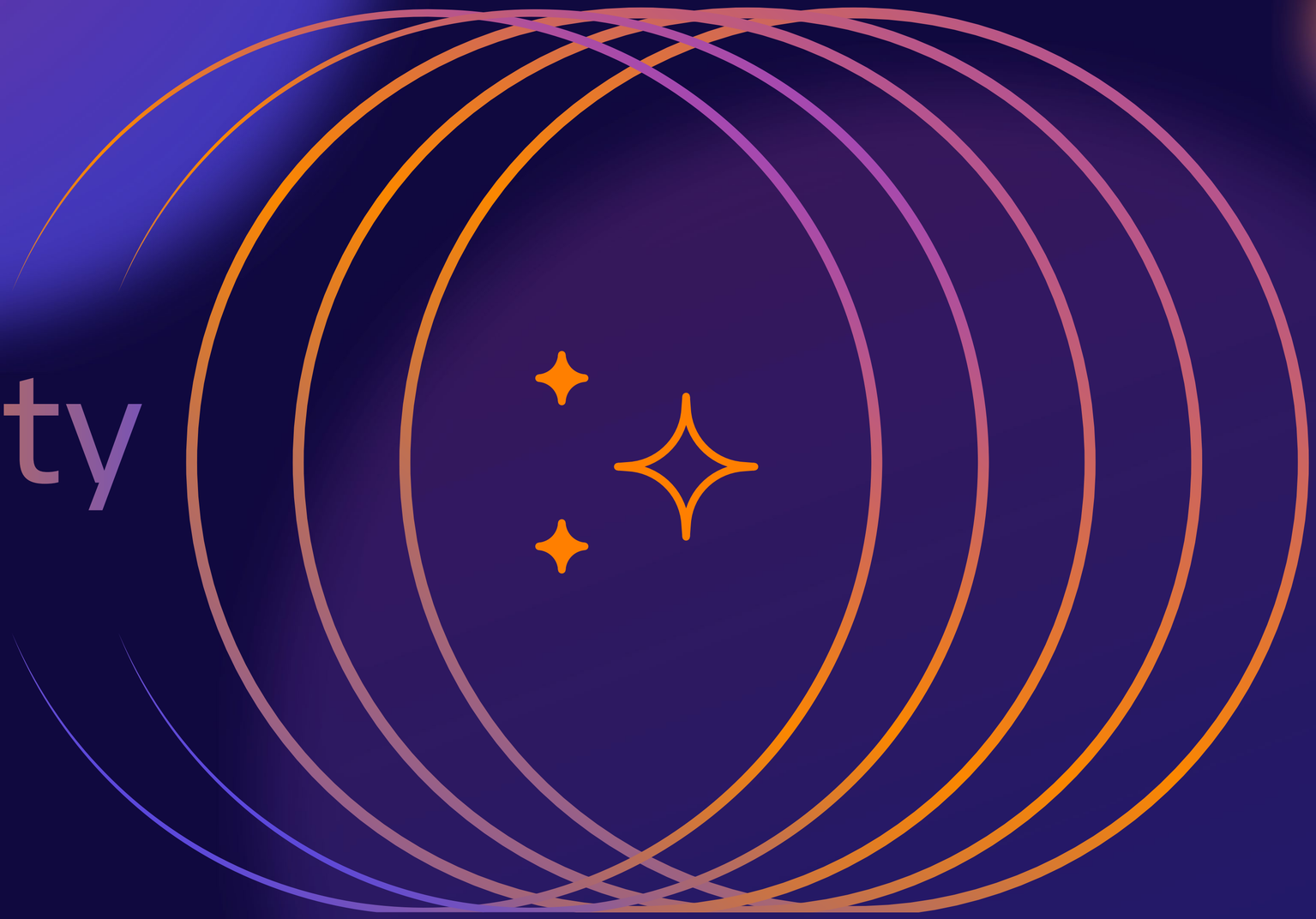
TeamViewer

AI Opportunity Report



2024

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The AI Opportunity

The AI opportunity

Artificial Intelligence (AI) can give, and Artificial Intelligence can take. It has the power to boost business efficiency and employee productivity but also the potential to undermine it through security risks if the correct procedures aren't put into place. Even when these risks are correctly managed, AI can be introduced in a blinkered fashion, hamstringing its ability to deliver widespread benefits and advancements.

Given this, it's unsurprising that fear and misunderstanding often permeate conversations around AI. To prevent organisations from falling behind through a lack of AI adoption, they need to reimagine how they're able to take advantage of the opportunity it brings. A better understanding of the technology surrounding AI lies at the heart of this.

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AI as the key to business efficiency and equality

We often think of AI as a tool for IT teams, white-collar workers, and something that benefits businesses overall rather than individual employees at all seniority levels. But what if we told you AI has the power to improve business outcomes while acting as a great equaliser?

Through creating opportunities for individuals – including parents, caregivers, and those with disabilities or illnesses – who've been locked out of certain roles or lines of activity through restrictive working models. Through empowering employees to grow in their careers, including carrying out more strategic work and IT tasks even if they're outside of the IT department. Through its use in sectors such as agriculture and manufacturing as well as finance and IT to deliver efficiencies.

AI has this potential. Across sectors and job roles, it can improve work opportunities for time-strapped employees while improving efficiency and productivity for better financial outcomes for the business.

But to what extent is this happening? Do people fully appreciate its benefits across roles and sectors? What's holding organisations back from capitalising on AI?

And what's the future of the technology around the globe?

Data as a tool for change

To drive meaningful change through AI, organisations need a deep understanding of the added value AI offers, barriers to its successful implementation and use, as well as the risks. Armed with this insight they can tap into the former while mitigating against the latter two. Having the latest data and data-led insights are essential to this.

The AI Opportunity Report uncovers the attitudes of 1,400 information technology, business, and operational technology decision makers towards AI, across the UK, France, Germany, Australia, Singapore, and the US. It investigates the questions organisations need to answer to understand the latest uses and perceptions of AI so they can fully unlock its benefits.

Questions including:

To drive meaningful change through AI, organisations need a deep understanding of the added value AI offers, barriers as well as the risks.

- **How extensively is AI used and trusted to help employees manage tasks and make predictions and decisions?**
- **What's standing in the way of it being used more widely?**
- **How concerned are organisations about the security risks around AI?**
- **Are perceptions of AI consistent across employee seniority levels?**
- **Do employees see AI as a tool that can empower them personally at work?**
- **Which countries, industries, and teams are charging ahead, and which are lagging behind?**
- **What do leaders see for the future of AI at work?**

Welcome to the age of AI use, maturity, competence, and confidence

AI use, maturity, competence, and confidence

Over the past few years, AI has become an increasingly common feature of our working lives, but how often are people actually using it? Do they see their use as mature and themselves as competent? What tasks are they trusting AI with?

Weekly and daily use of AI is exploding

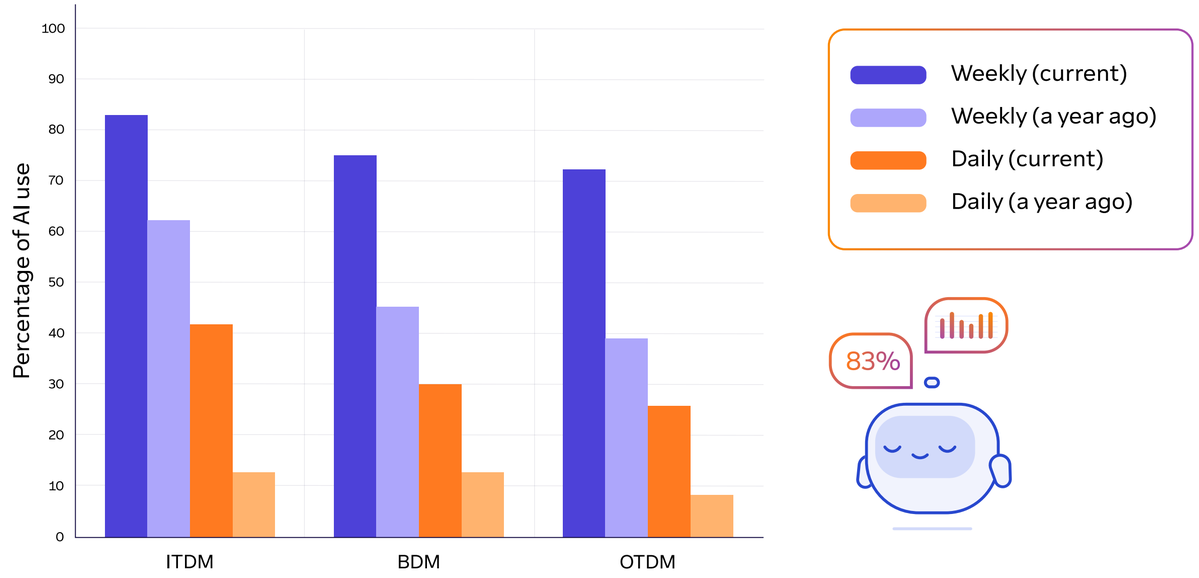
AI adoption has accelerated rapidly over the past 12 months. In fact, the vast majority of decision makers (79%) now use AI in their jobs at least once a week, with over a third (35%) using it every day. What's more, these figures show a drastic increase year-on-year; in 2023, weekly use only amounted to 52% and daily use 12%.

However, while AI use has increased across the board, levels of usage are by no means consistent across decision-maker types, levels of seniority, or industries, indicating a significant opportunity for growth.

Take decision maker types as an example. It will come as no surprise that IT decision makers (ITDMs) were early AI adopters, using AI significantly more than their counterparts in other divisions last year. Or that their usage is still higher than business decision makers (BDMs) and operational technology decision makers (OTDMs). But it is notable how significantly ITDMs' everyday use has increased over the past 12 months, with 42% saying they now use AI every day, compared to just 13% saying the same of a year ago.

Given that ITDMs led the way in weekly AI use in 2023, and BDMs and OTDMs are now beginning to close the gap, it's very possible we'll see BDMs and OTDMs continue to follow their lead next year and also significantly increase the frequency with which they use AI. A prospect supported by OTDMs' weekly use doubling in the last year (from 38% to 72%) and daily use more than tripling (8% to 25%).

AI use by ITDMs, BDMs, and OTDMs (weekly & daily)

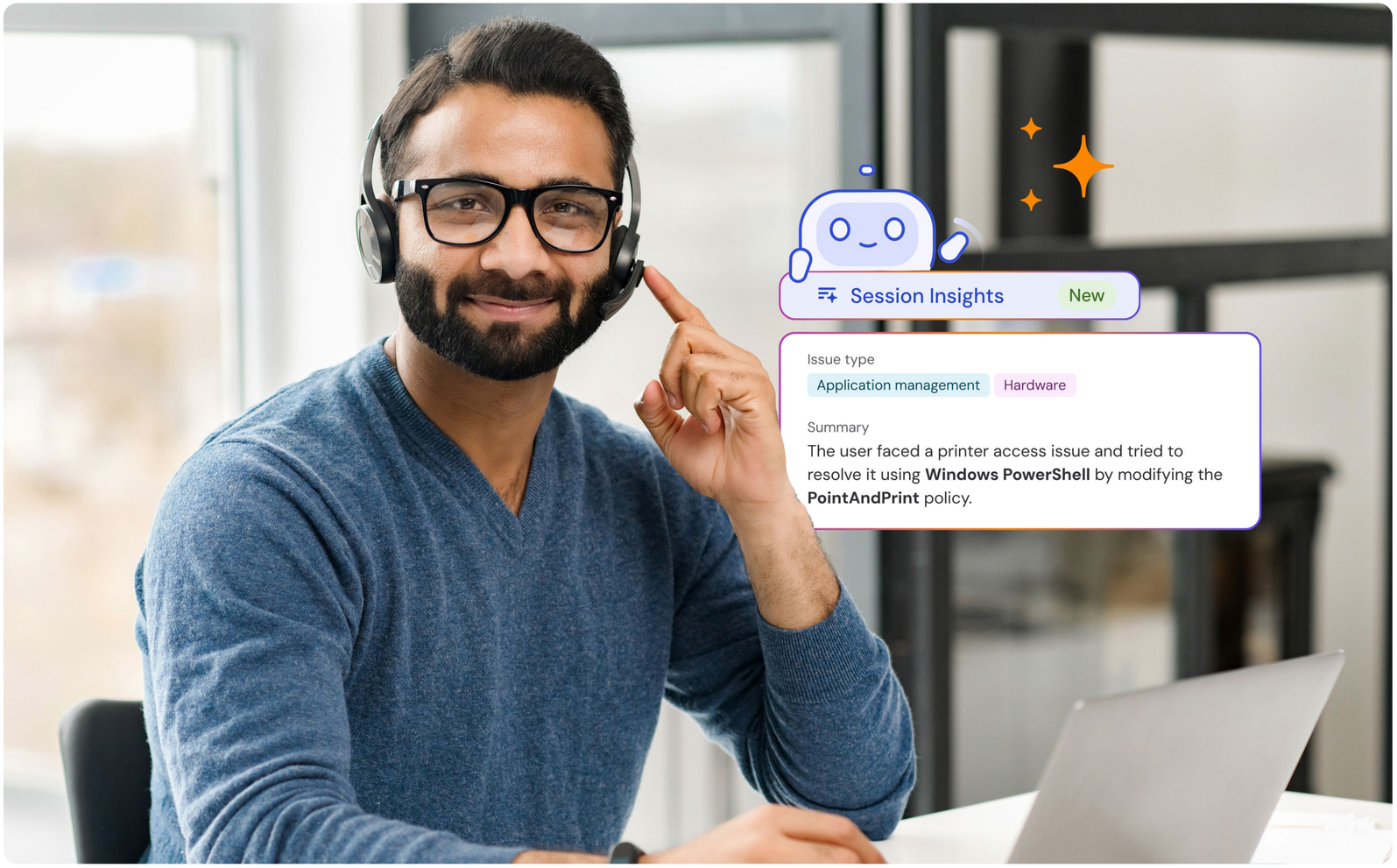


Alexander Post, Vice President of Product Management at TeamViewer offers insight into why AI use varies across decision-maker types:

“Industry 4.0 has been a talking point for more than a decade. But, in some sectors, the digitisation process is only just beginning in earnest. Conservative groups, such as OTDMs, are sensitive to changing their running systems, and for good reason, as they’re conscious of potential data leaks around their production process and remaining competitive. Given residual fears over transformation, and OT’s consequently lower levels of digital maturity, it’s unsurprising that OTDM have been slower to adopt AI than their IT counterparts. However, resistance to using AI is only part of the story.”

Artus Rupalla, Director of Product Management at TeamViewer adds:

“When the AI hype began the tools available were much better suited to IT than OT. Text-based generative AI was first to market and was highly accessible for IT personnel working at their computers all day. This plug-and-play approach couldn’t be taken by OT who typically need multiple modalities beyond text – like image, audio, and video – and who often employ devices purpose-built for specific use cases. All of which made integrating AI more complex and consequently slower. We’re seeing OTDMs begin to catch up with their counterparts when it comes to AI use, however, they won’t be able to reach parity until AI models cater to their specific requirements.”



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> Alexander Post,
> Vice President of Product Management at TeamViewer

Sophisticated AI uses

We know AI use is rising. But what's it being used for? The answer: in a lot of different ways. From predictive analytics and fraud detection to supply chain optimisation, product development, and content creation.

However, the top three uses are customer support automation (26%), data analysis (26%), and process automation (21%). These top uses are consistent among BDMs, but both ITDMs and OTDMs rate data analysis more highly – at 30% and 25% respectively – reflecting their more data-based roles.

Meanwhile, almost a quarter of the C-level (23%) say AI is being used in their organisations for decision-making support. Tellingly, this number halves to 12% among Junior Managers, indicating that more senior personnel may be using it for more advanced purposes.

Another more sophisticated application of AI is for inspiration and ideation. Although a smaller percentage of respondents are using it for this purpose (15%), there are country variances with 23% of German decision makers leveraging it in this way compared to just 11% of those in France and Australia.

This demonstrates that there's no one-size-fits-all rule for AI use around the globe.

High perceptions of AI maturity

As AI use rises so too do perceptions of AI maturity, and people have high faith in their level of advancement. 72% of respondents consider their organisations' AI adoption to be mature with 31% of these saying it's very mature.

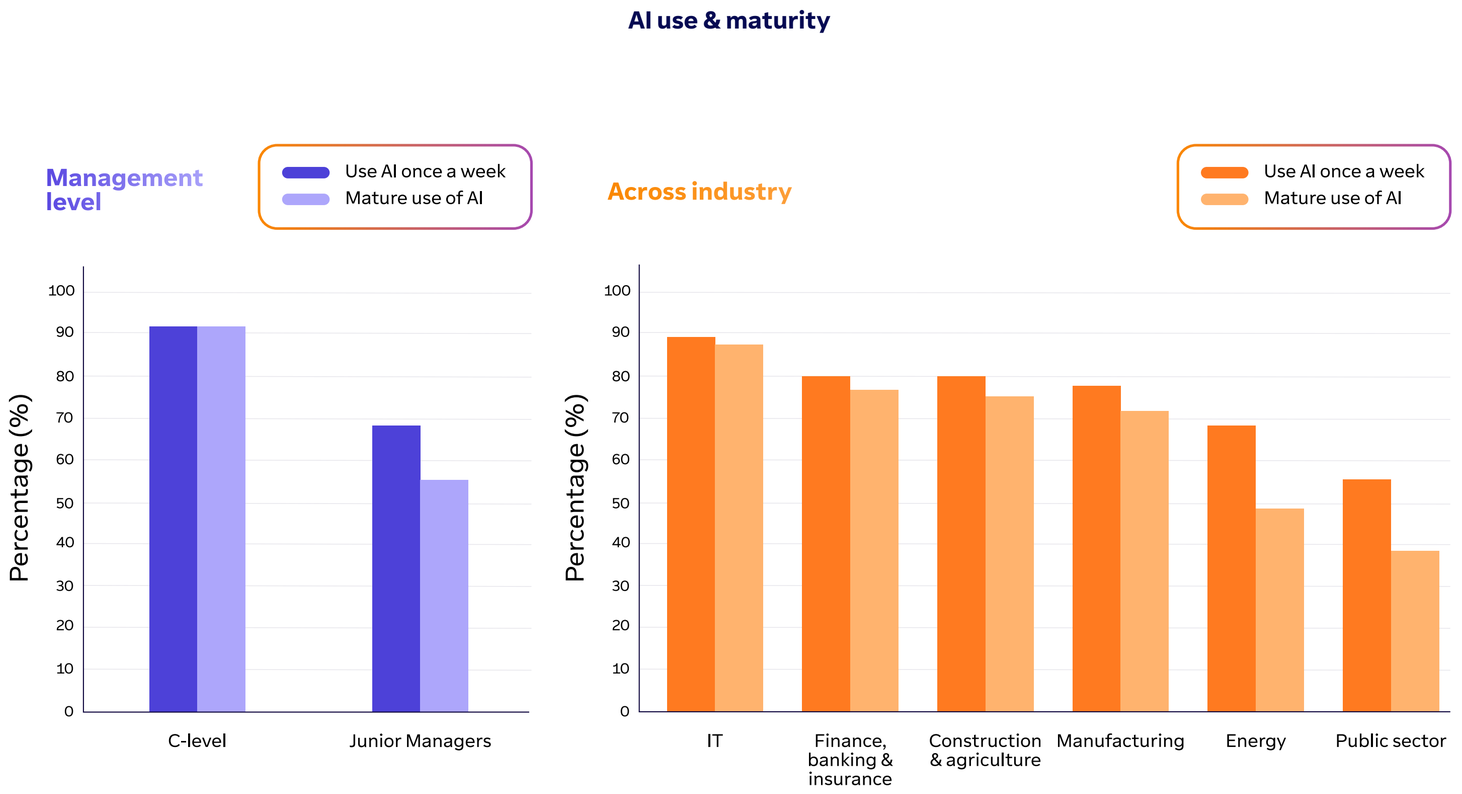
Confidence in maturity jumps up to 79% among ITDMs and down to 68% for BDMs and 62% for OTDMs, mirroring the frequency of their AI use.

This is reflected both among industries and seniority levels.

The C-level – who adopted AI early (72% were using it weekly a year ago) and are the most likely of all respondents to use AI frequently – have more confidence in their organisations' maturity than any other group, including ITDMs, at 92%.

Meanwhile, in sectors such as construction & agriculture, where AI is used weekly by 80% of decision makers, 75% rate their organisations' use of AI as mature. This is compared to just 39% of those in the public sector & education where only 56% say they use AI weekly.

These trends are mirrored across the more AI advanced industries – IT, finance, banking & insurance, and manufacturing – and the less advanced sectors, such as energy.



AI tools can be powerful research assistants, a capability that translates across all industries, leading to widespread use in several and consequently high perceptions of their own AI maturity.

Robert Haist
CISO at TeamViewer

Robert Haist, CISO at TeamViewer comments:

"As many of us will have experienced firsthand, AI tools can be powerful research assistants, a capability that translates across all industries, leading to widespread use in several and consequently high perceptions of their own AI maturity. Take construction as an example. You might think AI can't help you build an office block, but it can. Imagine you're onsite, four stories up, and need to check specific building codes, but your paperwork is on the ground floor. It's a lot quicker and easier to look up the information you need on your phone through a tool such as ChatGPT than make your way down four sets of ladders to your paper records."

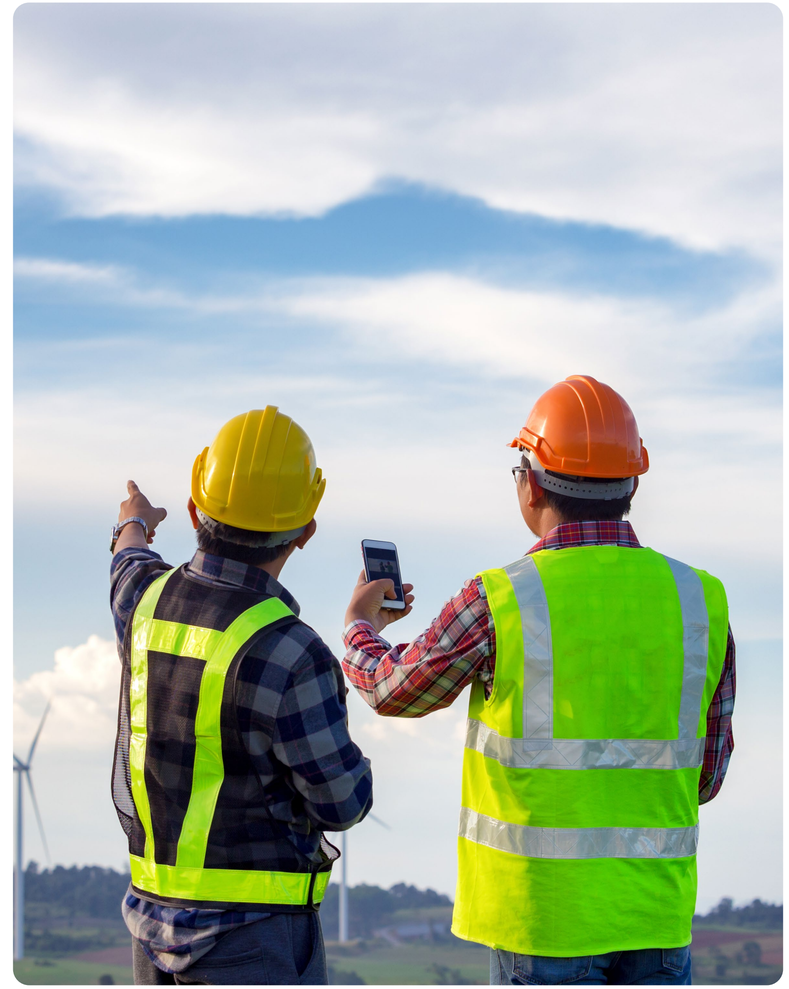
He continues: "Individuals in less AI-advanced industries, such as the public sector and energy, could use AI in a similar way. However, their uptake is slower due to various combinations of data privacy concerns, regulatory constraints, and a longer lead time to embrace digital solutions. Old infrastructure can also act as a barrier. However, as the finance industry has demonstrated, investing in infrastructure, for example, moving to the cloud, can catalyse broader digital transformation and lead to much faster uptake of innovative technologies, such as AI."

Countries largely follow the rule of high weekly AI use correlating to strong perceptions of maturity. 80% of US respondents categorise their AI use as mature – the highest percentage globally – and 81% use AI weekly. While France has the lowest weekly use of AI (65%) and also the lowest perception of maturity (61%). However, there are those that buck the trend.

For example, while 79% of German respondents are using AI at least once a week, they are most likely to say their overall AI adoption isn't mature at all – with 7% stating this is the case.

Robert explains: "In some markets, AI use is very much in the experimentation phase, explaining why they see their AI adoption as less mature than others. But this doesn't mean there aren't examples of where AI is delivering benefits for businesses and individuals. Some countries have a more cautious approach to digital transformation, which also impacts the implementation of AI. Stringent regulations also act as a barrier.

This doesn't mean that employees, organisations, and governments in these markets don't see AI as a tool that could benefit them in the future. Rather, they want to carefully consider its implementation and see what others are doing to avoid any pitfalls and maximise the benefits."



Some countries have a more cautious approach to digital transformation, which also impacts the implementation of AI.

Rising confidence in AI proficiency

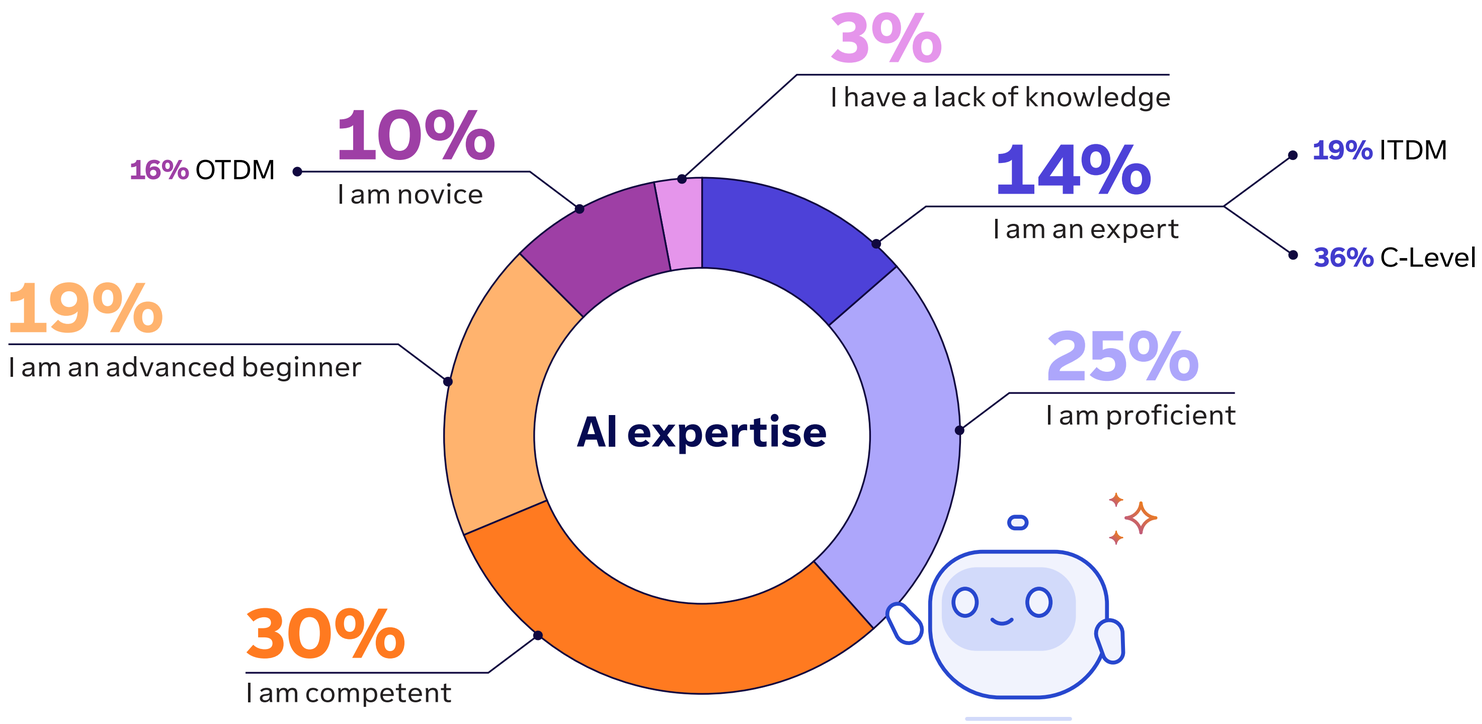
In correlation to increasing AI usage and perceptions of maturity, AI comfort is also growing. Over two-thirds (69%) report that they personally feel at least competent when it comes to using AI, while only three percent say they have a lack of knowledge.

As we'd expect, ITDMs – the group typically responsible for implementing and controlling the use of AI – are more likely to say they're competent, proficient, or an expert in AI (80%) compared to BDMs (63%) and OTDMs (52%). However, it might seem surprising that only 19% of ITDMs would call themselves experts, a figure that jumps up among the more confident C-level group.

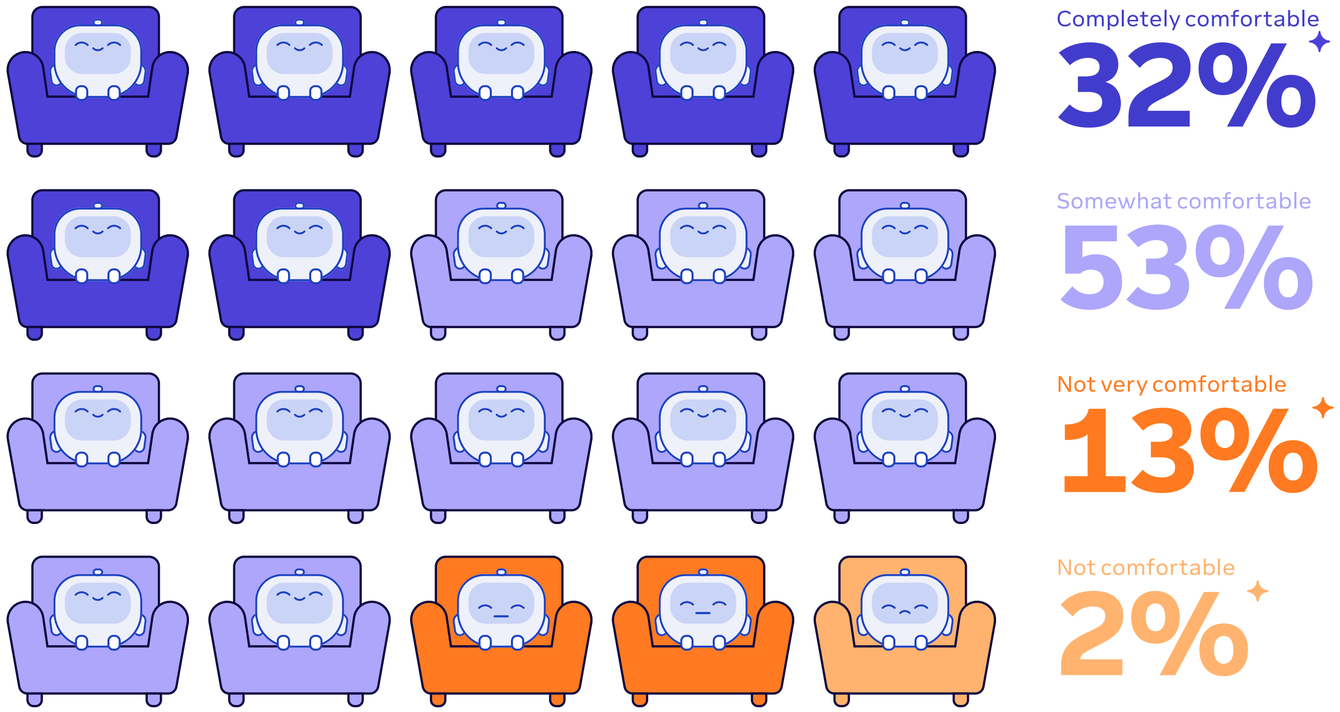
Hendrik Köhler, VP of IT Infrastructure & Operations at TeamViewer, outlines why fewer ITDMs may call themselves experts:

"AI is complex and ever-evolving. ITDMs will be acutely aware of this, and their own limitations, and resultantly less likely to classify themselves as experts. Tied to this, they will have a deeper understanding of the more complex uses of AI and how to harness it for corporate use, such as incorporating it into CRM automation."

AI expertise across different roles and skill levels



AI expertise across different roles and skill levels



64% among the C-level, 18% among Junior Managers, 47% in the US 16% among OTDM 0% in Singapore

In line with their lower AI use and maturity ratings, OTDMs are much more likely than ITDMs to call themselves novices (16% compared to 10% across all respondents).

Artus Rupalla explains:

"Confidence in technology can only come with frequent use and proof of concept. At present, generative AI best lends itself to text-based tasks, such as creating content and structuring data, which are of most help to those in IT or business functions. By contrast, OTDMs are likely to want to use AI for tasks that require image, audio, or video inputs, and where deterministic results – such as predictable and consistent outputs based on the same initial inputs – are required. As such, it's natural that OTDMs are using AI less and are much more likely to consider themselves novices. To change this, AI models need to be developed that better fit OT needs.

This means improving their ability to process non-text input and gathering large quantities of custom data for training purposes. Once models have these advanced capabilities, they will be usable for OT tasks such as workflow support for turbine maintenance and, consequently, adoption of AI and the importance attributed to it will grow quickly."

Despite certain groups being less confident in their personal AI capabilities, a very high proportion of respondents across the board (85%) are comfortable with employees outside of the IT team using AI.

It's notable that C-level respondents are more comfortable than Junior Managers (92% vs 81%) and ITDMs are more comfortable than BDMs and OTDMs (87%, 84%, and 81% respectively).

This indicates that those who have a better understanding of AI have more faith in their colleagues' ability to use it effectively. A concept supported by more advanced AI nations, including Singapore (94%) and the US (87%), saying they're more comfortable than respondents in France (76%) who are using AI less and rate themselves as less mature. Outside of these demographics, it's noteworthy that most respondents (75%) believe younger people have a stronger grasp of AI technology. Interestingly, this belief is most strongly held among 35-44-year-olds (80%) and drops to its lowest among 18-24-year-olds (70%) – suggesting that either older respondents are overestimating their junior counterparts' capabilities or younger people are underestimating their capabilities.

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> Artus Rupalla
> Director of Product Management
> TeamViewer

AI is increasingly trusted with complex tasks

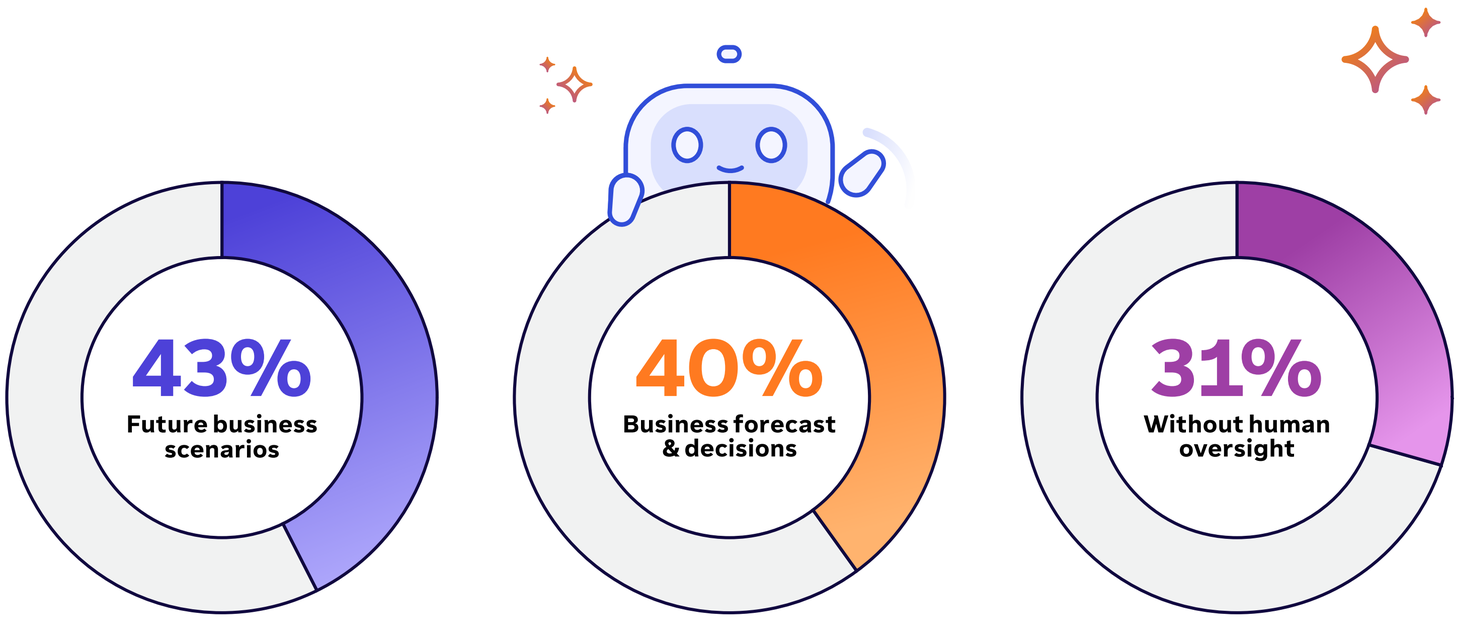
Not only are people increasingly comfortable with AI being used in their organisations, but they're also more confident in trusting it with complex tasks. What's more, those who have more experience with the technology, and a better understanding of it, are more likely to put their confidence in it for more advanced actions.

Take predictions as an example. A strong percentage of respondents would trust AI to forecast future business scenarios (43%). However, this number increases among more AI mature groups, such as ITDMs (50%), the IT industry (57%), the C-level (70%), and US respondents (53%).

Trust in AI to act on these forecasts and make business decisions accordingly is slightly lower at 40%, but once again follows the trend, with 49% of ITDMs giving their vote of confidence, 58% of those in the IT industry, 67% of C-level decision makers, and 50% of US respondents.

Understandably, AI is least trusted to make decisions without human oversight (31%). However, confidence levels remain relatively high among the C-level (61%) and in the IT industry (48%), while a consequential 41% of ITDMs and 42% of those in the US would also back AI's capabilities in this area.

Trust in AI across different scenarios and roles



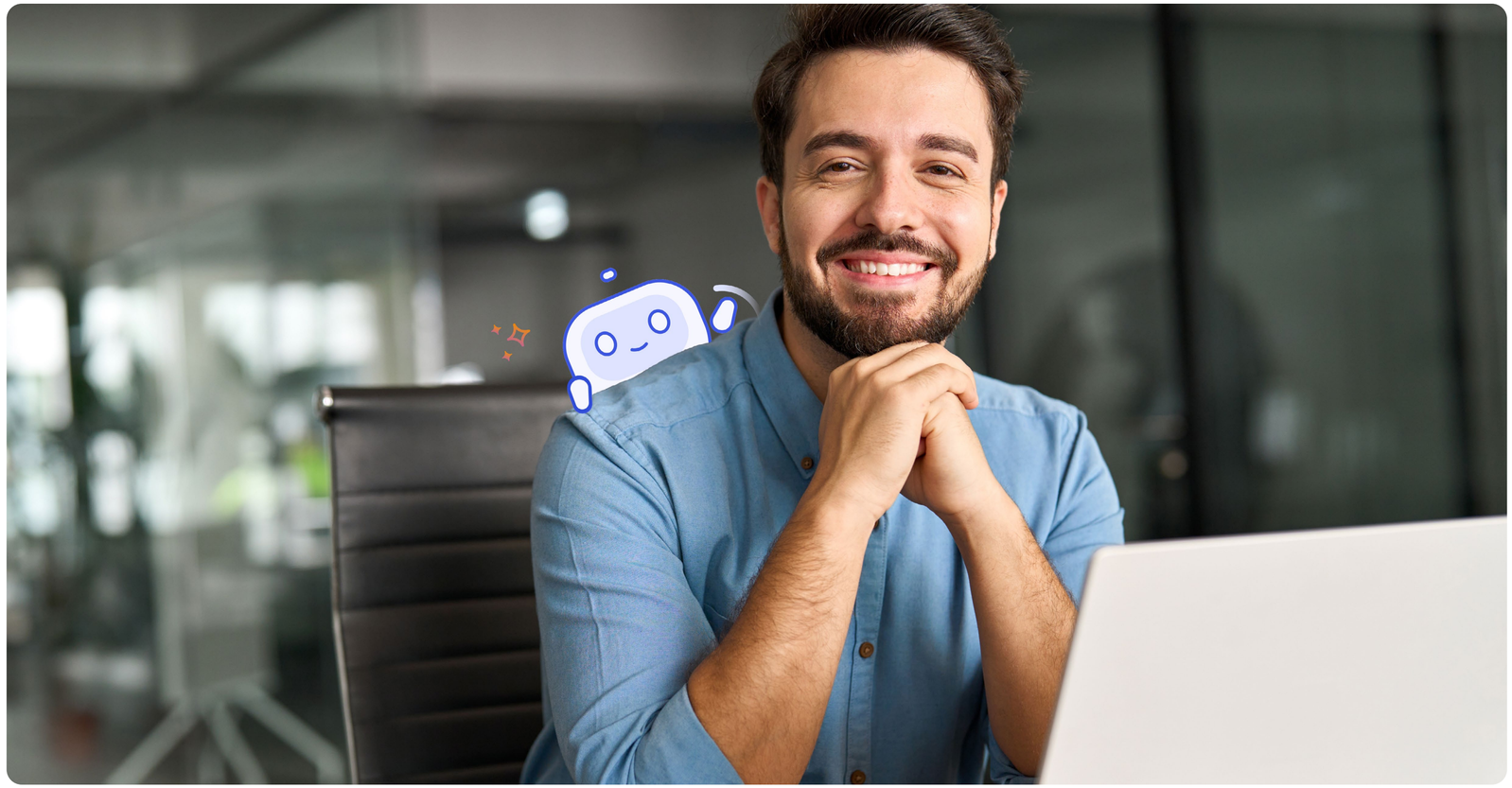
Mei Dent, Chief Product and Technology Officer at TeamViewer encourages these individuals to exercise caution:

"I believe that one day in the near future we'll have truly agentic AI. In other words, AI that has advanced decision-making capabilities, goal-directed behaviour, and a high level of autonomy. However, at present, I don't think the technology is mature enough for complex actions to be successfully taken without any human oversight. With that in mind, I would advise caution to anyone willing to trust AI to make independent decisions. Not least because technology isn't the only thing that needs to advance. Laws and regulations also need to be adapted in case of a dispute on liability. Without this, the most advanced AI will just remain a 'co-pilot' for business-critical decisions."

Alexander Post adds:

"AI isn't always right. It makes assumptions based on the data we provide it with. That means that you need industry insight to assess whether the answers it gives you are correct. While this remains the case, it would be imprudent to trust it without question. However, this doesn't detract from its potential to support humans with complex tasks, including forecasting. Nor does it mean that we should stop investing in advancing its capabilities so we can reach a point where agentic AI becomes a real option."

Interestingly, male respondents are far more likely to trust AI in all more complex use cases than their female counterparts. For example, 37% of men would trust AI's ability to make decisions without human oversight compared to just 23% of women. Furthermore, in all cases, 35-44-year-olds are most trusting (37%), perhaps due to their greater business understanding than their more junior colleagues and greater confidence than mature employees who tend to become risk-averse with age.



AI is moving the needle for businesses and individuals

AI is moving the needle for businesses and individuals

AI use is undoubtedly on the rise, but what do people see as the biggest benefits for businesses and individuals? And what are their greatest fears about not capitalising on the AI opportunity?

AI will provide the biggest productivity boom in a century

Decision makers overwhelmingly recognise the benefits of AI, with 99% saying there are benefits to adopting it, particularly in enhancing efficiency and productivity, with a third (33%) citing this as the biggest advantage.

Meanwhile, 75% of respondents also agree that AI is critical for improving business efficiency. In support of this, 69% acknowledge that AI will provide the biggest productivity boom in a century. A statement most strongly agreed with by advanced AI industries (IT as well as Construction & Agriculture – 80%) and nations (UK – 74%, US – 73%), as well as senior personnel (C-level – 79%), and ITDMs (75%).

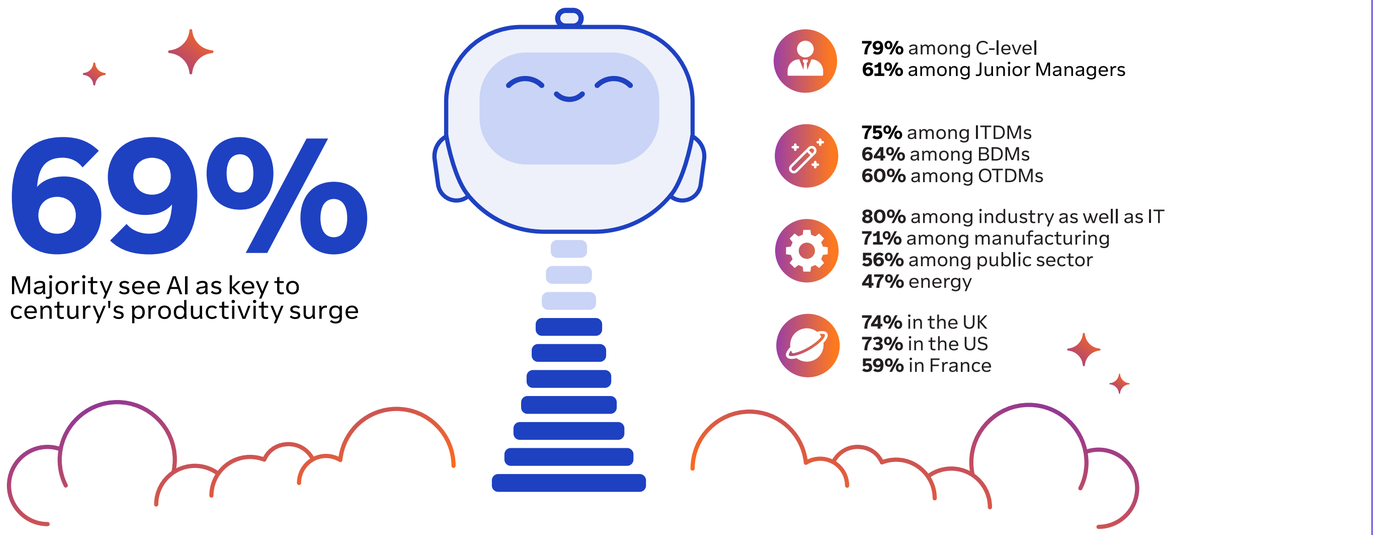
Following efficiency and productivity, the next top benefits of AI cited by respondents are:

- **Greater ability to deliver customer satisfaction (24%)**
- **Gaining better insights into processes and performance (23%)**
- **Ability to upskill employees in technology (22%)**
- **Improved product quality and reduced defects (20%)**

Interestingly, the number of respondents who believe AI can enhance product quality increases to 24% among ITDMs while dropping to 16% among the OTDM group who we might suspect would be most likely to benefit from AI.

Inconsistencies between the views of ITDMs, OTDMs, and BDMs are also apparent in their perceptions of AI's impact on business innovation and growth. 80% of ITDMs agree AI is critical, a view shared by 73% of BDMs, but only 64% of OTDMs. Similarly, 84% of the C-level say AI is critical compared to 73% of Junior Managers. This once again indicates that those who are most familiar with AI have the greatest clarity on its power.

AI is set to drive the biggest productivity boom in a hundred years, say 69% of respondents



It’s widely acknowledged that AI can unlock financial benefits for organisations across a whole spectrum of industries. These benefits extend beyond revenue increases and include cost savings.

Mei Dent, Chief Product and Technology Officer at TeamViewer

Alexander Post comments:

“There’s a clear need for improved communication between IT and OT as well as C-level and Junior Managers on the advantages AI can deliver, including in terms of the product quality improvements AI offers. This will be essential to increasing the uptake of AI so its benefits can be fully realised.”

Further business benefits acknowledged by decision makers include its ability to enable non-technical employees to analyse data and determine the best course of action in tasks. 72% agree AI is delivering on this, a figure that increases very slightly among ITDMs (76%) and drops marginally among OTDMs (69%) and BDMs (68%). The small variances here indicate that although greater communication on the benefits of AI is needed outside of IT teams overall, there’s been good education on its ability to enable non-IT experts to take up tasks traditionally reserved for these teams.

The undeniable financial benefits of AI

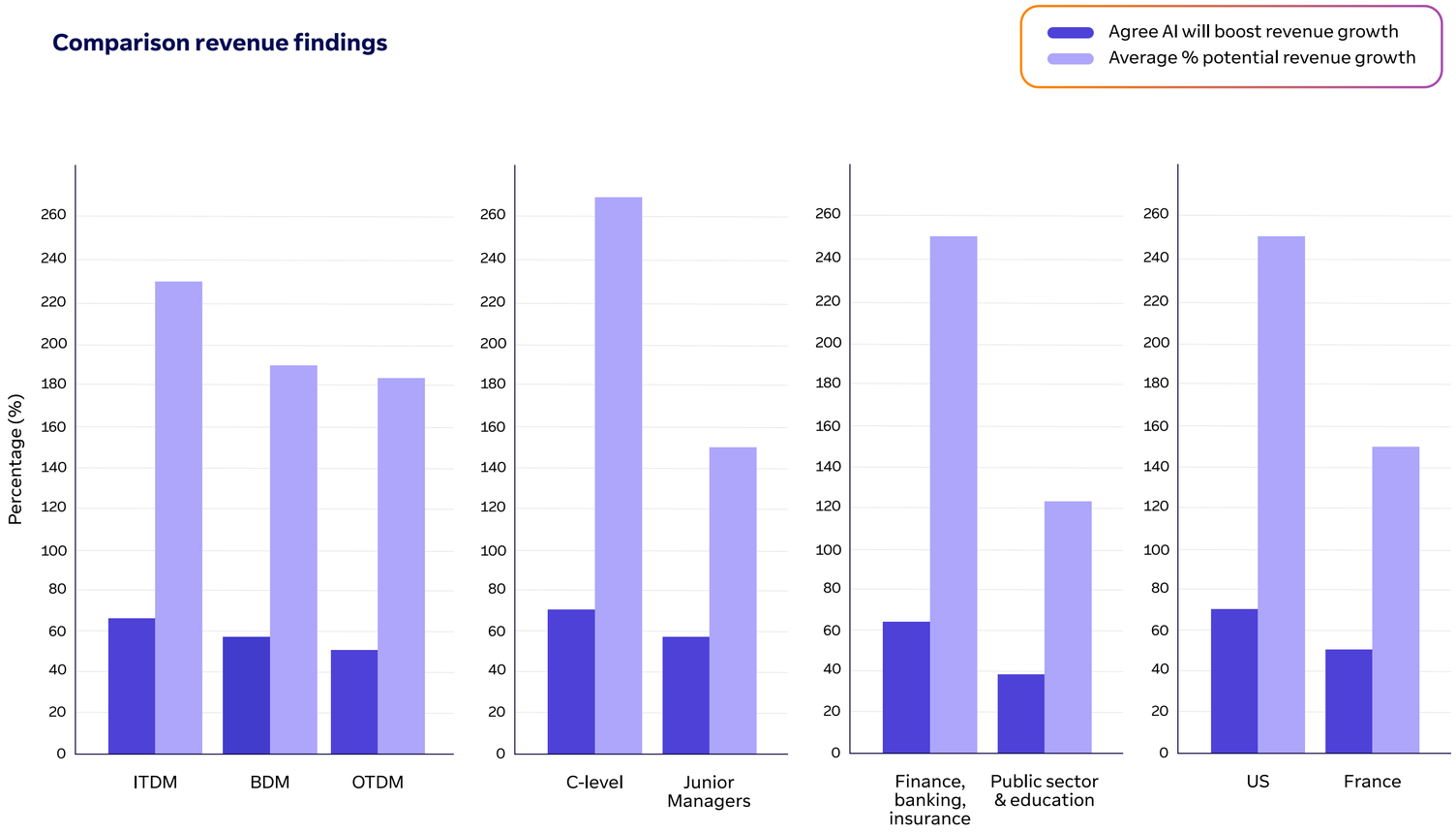
Beyond the plethora of business benefits outlined above, AI is also improving organisations’ financial position. In fact, 70% agree AI is vital to achieving improved financial outcomes for their organisation. Following the common theme, C-level respondents believe this more vehemently than Junior Managers (84% compared to 61%) and ITDMs more than BDMs and OTDMs (76% compared to 67% and 60% respectively). The same can be said when asked about the impact of AI on financial growth. Overall, just under two-thirds (61%) agree AI will positively affect revenue over the next year, with respondents saying an average of 211% revenue growth is possible through the technology.

ITDMs have more faith than their less AI experienced colleagues, likely due to a greater awareness of AI’s capabilities and visibility into ROI. 66% of ITDMs say AI will have a positive impact, rating potential revenue growth at 233%. By comparison, 56% of OTDMs say the same and approximate their revenue could increase by 187%.

Similarly, it’s clear that AI is seen to be more commercially viable among more senior personnel. 73% of the C-level, compared to 59% of Junior Managers, say AI can positively impact revenue growth. With the C-level approximating revenue growth of 270% and Junior Managers 153%. While this isn’t surprising, it may mean that there is scope for Junior Managers to become aware of the revenue opportunities and benefits brought to the company by AI.

It’s notable that those working in the public sector & education estimate by far the smallest revenue increase at 123%, an understandable figure given their limited AI use and their priority not always being on revenue generation but rather service delivery. Whereas those in the financial sector, who use the technology more extensively, estimate higher growth (248%) than any other industry. This illustrates that the more AI is used the greater the monetary benefits that can be achieved.

Comparison revenue findings



AI can automate time-intensive and therefore expensive processes, such as summarising information, to free up staff for more complex tasks, and in so doing improve their output.

Mei Dent, Chief Product and Technology Officer at TeamViewer

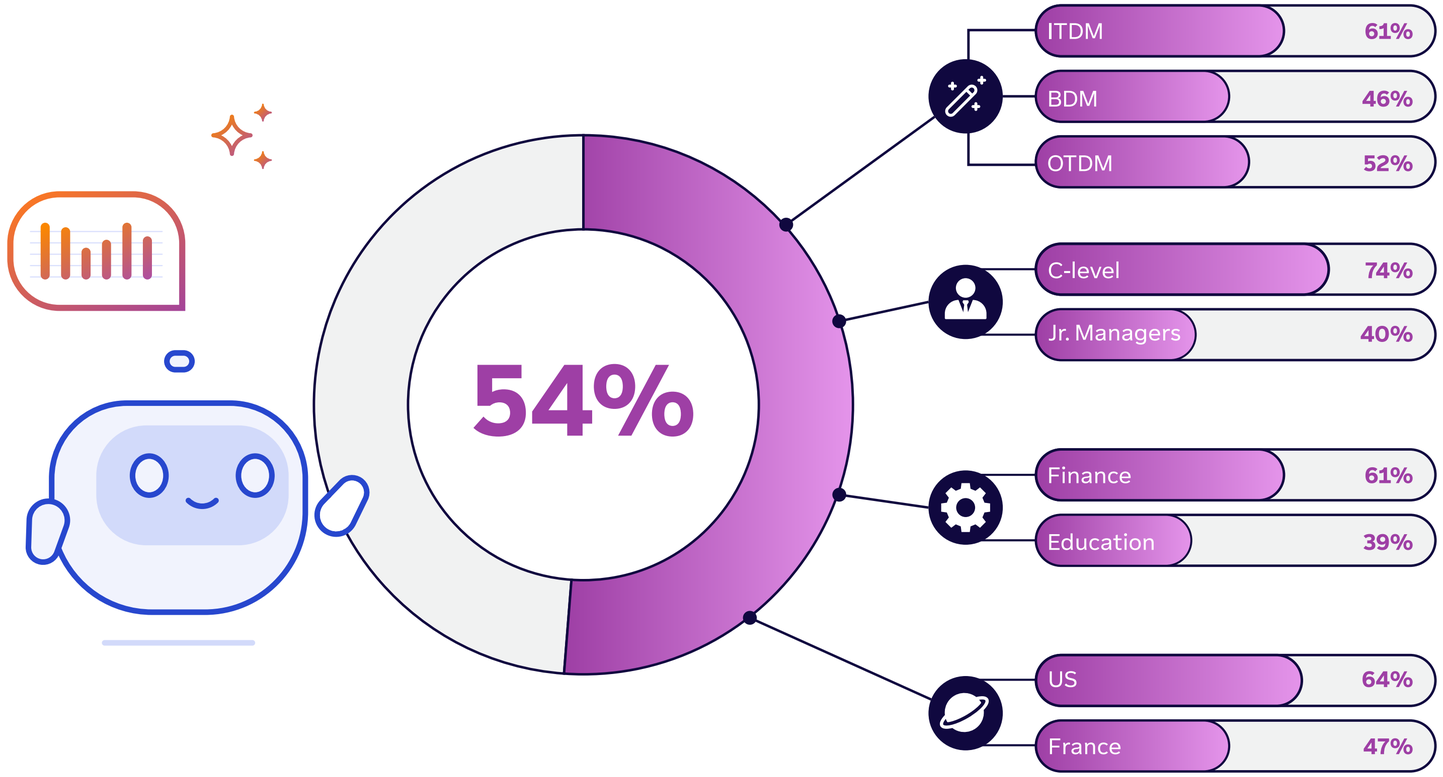
Mei Dent notes:

"It's widely acknowledged that AI can unlock financial benefits for organisations across a whole spectrum of industries. These benefits extend beyond revenue increases and include cost savings. For example, AI can automate time-intensive and therefore expensive processes, such as summarising information, to free up staff for more complex tasks, and in so doing improve their output. It's notable that C-level executives are most likely to recognise the financial benefits of AI as they have the power to introduce it, making their acknowledgment of potential ROI more significant."

Despite all the financial potential of AI, it's reassuring that respondents aren't blinded by this and are still committed to sensible AI use. 54% say they would sacrifice extra business growth/profit in favour of using AI responsibly.

Those who felt most strongly that AI could deliver the greatest financial benefits are more likely to agree with this statement, demonstrating their tempered approach.

Willing to sacrifice growth for responsible AI use



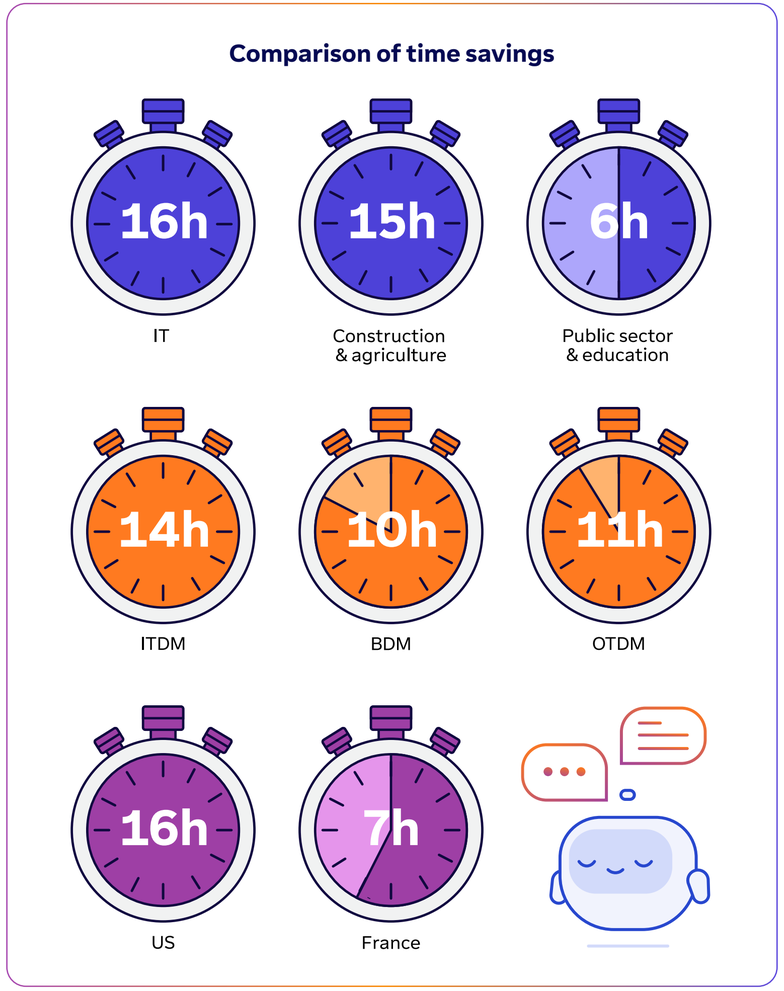
Time savings and new job opportunities

One criticism of AI in the workplace is that it benefits organisations more than it does individuals. However, our data shows that both groups are put at an advantage through AI. Firstly, when it comes to time savings; respondents say AI is saving employees 12 hours per month – almost two working days.

While all groups were found to save time through AI – a testament to its effectiveness in this area – those that use AI the most are experiencing the biggest benefits. Illustrating what's possible when the technology is fully embraced. For example, employees in the IT industry are saving 16 hours through AI, compared to staff in the public sector saving six hours.

It could be suggested that IT personnel will save more time than any other group through AI because of their unique technical capabilities. However, respondents in the construction & agriculture sector also estimate that 15 hours can be saved through AI. Illustrating that anyone, including those with a non-IT background, can unlock time savings with the right approach.

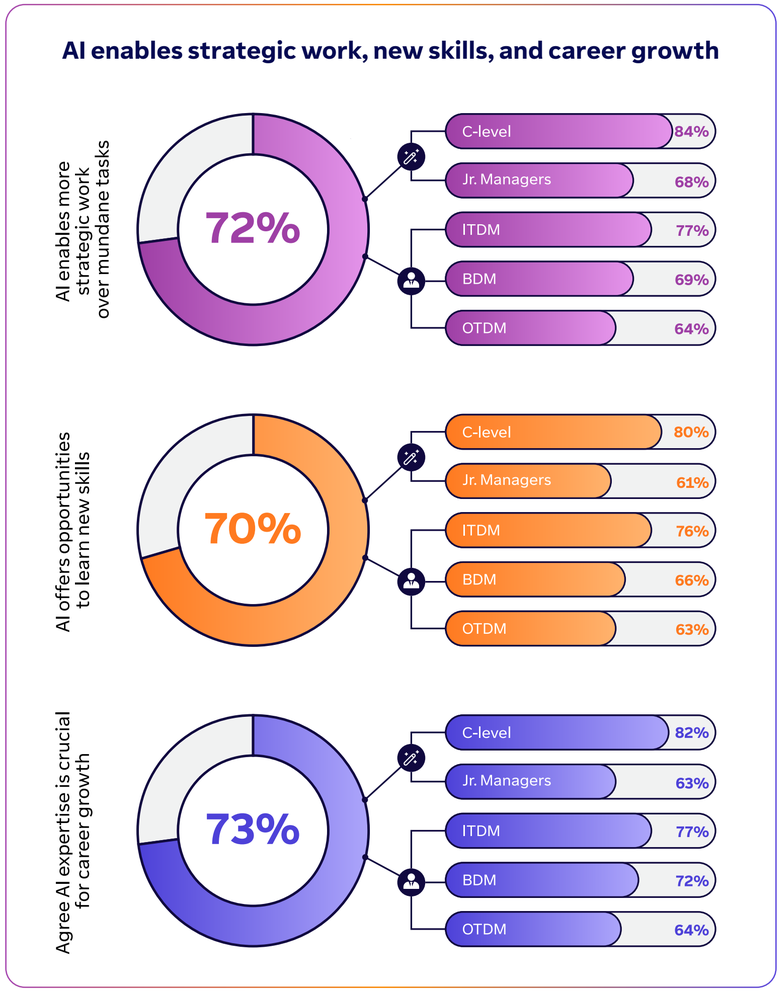
The additional time created through AI frees staff up, a benefit amplified by AI's ability to take on mundane tasks. 72% agree AI has allowed them to do more high-level strategic work and 70% also say that AI has given them the chance to learn new skills they otherwise wouldn't have learnt. This demonstrates the power of AI to not only make employees' day-to-day working lives easier but also assist career advancement. A fact supported by just under three-quarter of respondents (73%) agreeing that AI is a key skill to enhancing their careers. All of these benefits are most keenly felt by ITDMs and the C-level, mirroring their more advanced relationship with AI than OTDMs and Junior Managers.



Mei Dent explains differing perceptions of AI's benefits:

"While a high proportion of all personnel recognise AI's potential to improve their career prospects, it's telling that junior staff are less likely to believe in this than their senior counterparts. This discrepancy can be explained by uncertainty over how AI will impact their jobs and a lack of knowledge about their company's long-term mission. The reality is, any new technology changes the world of work, but this doesn't necessarily equate to redundancies. To offset anxiety, leaders need to clearly communicate what their AI strategies are, outline how roles will evolve for the better, and emphasise the new opportunities that will emerge for employees at all levels."

Any new technology changes the world of work, but this doesn't necessarily equate to redundancies.



Alexander Post adds:

"In OT specifically, more groundwork is required to build tailored AI solutions that illustrate the full potential and benefits of the technology. Notably, creating the data layer needed to train effective models. This will require a significant overhaul as many organisations currently lack sufficient visibility over their data to build their own internal AI tools. However, with this challenge overcome, we would see AI uptake and appreciation of its benefits rise significantly among OTDMs."

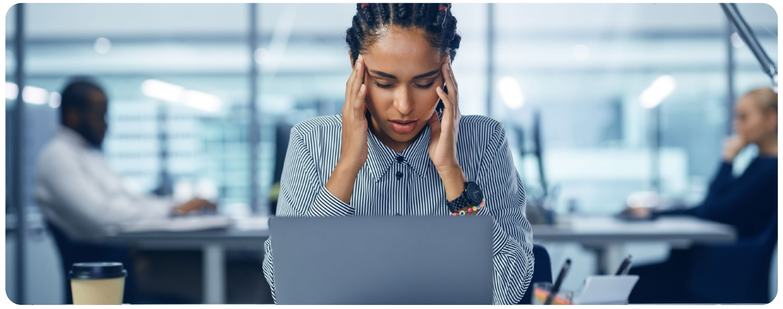
Not using AI comes with serious consequences

Beyond missing out on the benefits, choosing not to adopt AI has significant ramifications for all organisations. This is almost universally acknowledged with 97% believing there are consequences for not embracing AI. Approximately a quarter (26%) of respondents say the biggest impacts will be falling behind competitors – something no organisation can risk in a challenging business climate – and higher costs due to lack of automation (25%). It's noteworthy that the latter figure rises to 30% among organisations with 200-499 employees, while dropping to 21% for companies with 5,000-10,000 staff members. This reflects the greater need for automation among SMEs to offset their lower headcounts and indicates AI investment is particularly important for this group to save even greater costs down the line. After competitiveness and higher costs, the next biggest consequences cited are:

- **Inefficient processes wasting resources and time (23%)**
- **Increased stress from inefficient processes among employees (22%)**
- **Difficulty analysing and utilising large data sets (21%)**

Missed opportunities in new markets are also noted by 20% of all respondents but is a particularly keen concern in the UK, where it's rated a top three concern by 26% of decision makers, demonstrating that AI is particularly important in this region for facilitating new growth.

The wide variety of repercussions acknowledged illustrate the far-reaching impacts of AI on employees, the tangible difference it's making to operations across organisations, and the widespread recognition of these.



Education, cost and security risks stand in the way of wider adoption

Education, cost and security risks stand in the way of wider adoption

Given that the benefits of AI are popularly accepted, what's holding people back from taking it up more widely? Both among those demographics who have been slower to integrate it into their operations and those who are more advanced but still have space for growth?

The education hurdle

Barriers to adoption vary across demographics, but one factor persistently raises its head – education. Across all respondents, a lack of education on how to use AI (37%) is seen as the biggest barrier to adopting AI.

This is consistently rated a top concern among all countries, decision maker types, company sizes, seniority levels, and industries. Demonstrating that even those who are more experienced in AI think there's room and a need for improvement.

However, understandably, worries peak among BDMs, companies with 200-499 employees, and Junior Managers (all 42%). Groups who were all less likely to rate their AI use as mature or use AI at least once a week and are consequently less far down the AI road meaning they require more educational support.

> It's clear that a comprehensive education programme is essential to any AI adoption strategy. With this in place, organisations can be confident that they'll see broader uptake and integration of AI across the board.

Hendrik Köhler, VP of IT Infrastructure & Operations at TeamViewer

Hendrik Köhler comments:

"It's clear that a comprehensive education programme is essential to any AI adoption strategy. With this in place, organisations can be confident that they'll see broader uptake and integration of AI across the board."

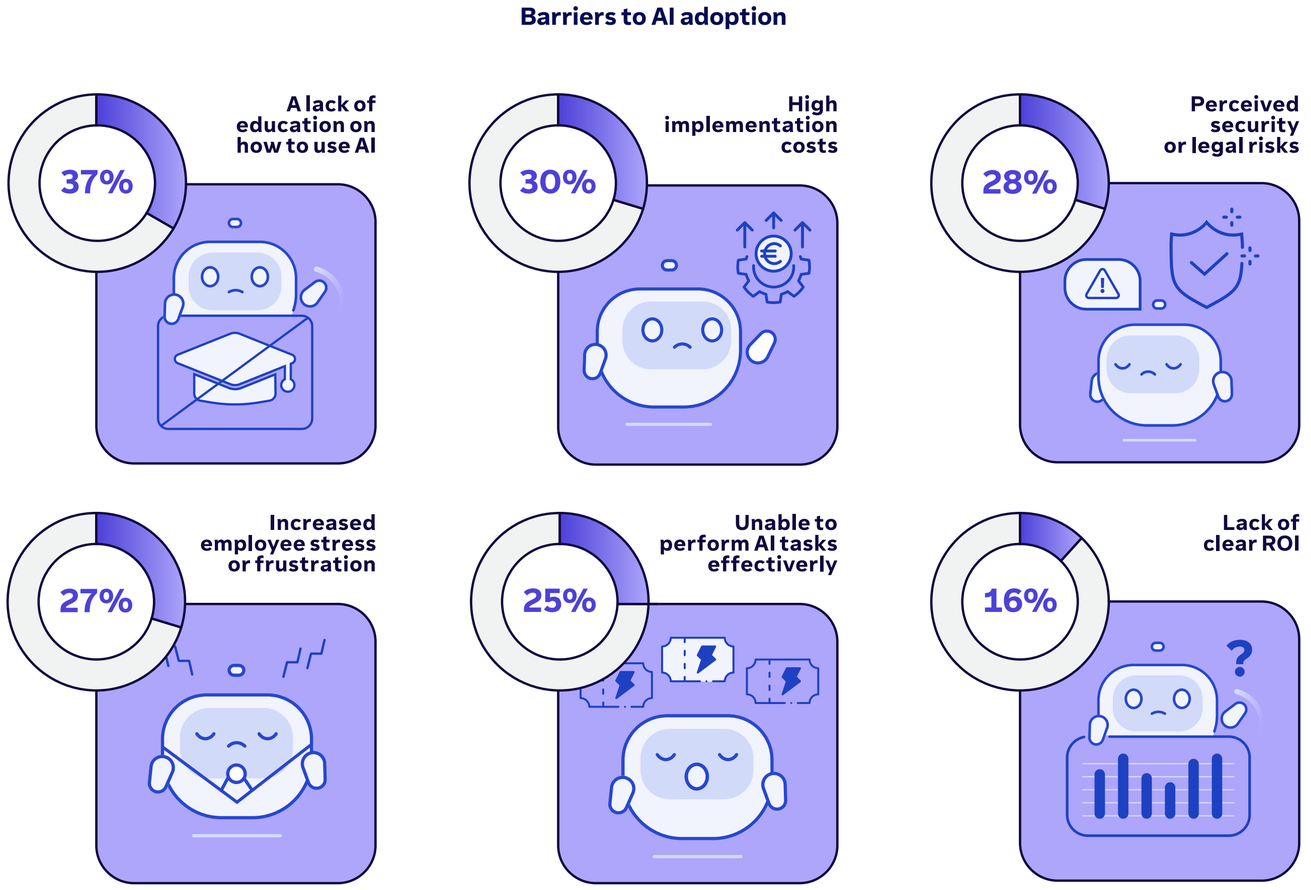
Education is also vital to managing employee concerns around AI. One in four (27%) of decision makers cite increased employee stress or frustration, due to reluctance to adopt change, as a key barrier to AI adoption. Changing the way staff view AI, and their comfort in using it, will go a long way in turning these anxieties on their head. This is an essential step as leaders need to be confident that AI won't affect their employees' wellbeing and that staff will use it, delivering a return on investment, before they'll push its adoption.

Introducing AI comes at a cost

Beyond education, the second biggest barrier to AI adoption is high implementation costs – cited by 30% of respondents. Once again, this is a common concern among all demographics. However, it is of particular concern among more developed AI users, such as Singapore and the UK (36%), ITDMs (33%), and in the IT industry (34%). This may suggest that those who are more familiar with AI have a better understanding of the costs associated with it and are more likely to see it as an obstacle on this basis.

The implementation costs challenge is cemented, in many cases, by a lack of financial support within organisations to enable them to scale quickly enough to keep pace with AI innovation. Just under half (46%) agree this is an issue, a statistic that rises to 53% among the C-level, reflecting their more financially driven mindsets.

Both figures demonstrate financial considerations and limitations have a part to play in holding AI adoption back. However, it's important to note that this doesn't mean decision makers believe AI will fail to deliver a return on investment. Indeed, only 16% of all respondents say a lack of clear ROI is a barrier. Regardless, a lack of funds is a key issue as it limits organisations' abilities to invest in the wider technological infrastructure required for AI to shine. 25% of respondents say legacy technology that is unable to perform AI tasks effectively is a barrier to adoption. This figure rises to 32% in Singapore (the highest of all countries) and the IT industry and 30% among ITDMs and OTDMs.



It’s telling that OTDMs are just as likely as ITDMs to recognise legacy tech as a barrier, given their traditional focus on the physical rather than the digital world. But it’s also promising to see that they recognise this is an issue; after all, awareness is the first step to resolution.

Mei Dent offers advice on how to secure the financial investment required to make AI a success:

“Replacing legacy technology that can’t support AI is an important step in facilitating its introduction. However, the costs associated with this and investing in AI more generally can be off-putting. The best approach organisations can take to mitigate against this is to calculate clear ROI, identify the most relevant use cases through pilot projects, and encourage staff to experiment with AI within comprehensive ethical and data privacy guidelines. This will illustrate AI’s value for increasing internal productivity and engagement and therefore provide a sustainable model for securing and retaining financial investment.”

The best approach organisations can take is to calculate clear ROI, identify the most relevant use cases through pilot projects, and encourage staff to experiment with AI within comprehensive ethical and data privacy guidelines.

Mei Dent, Chief Product and Technology Officer at TeamViewer

As AI knowledge rises, so too do security concerns

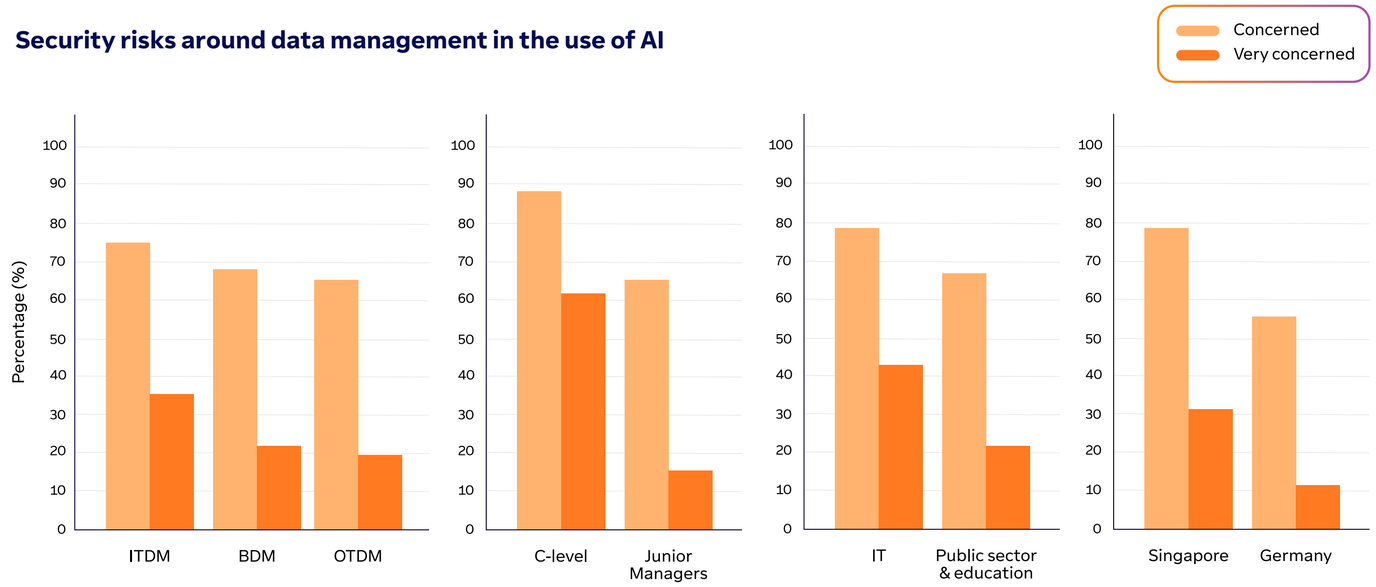
Outside of education and financial costs, security is an undeniable obstacle to more widespread AI use. This is unsurprising as security concerns often dominate conversations around AI and for good reason as all innovative technologies can introduce a new attack surface. Specifically, over two-thirds (69%) of decision makers are concerned about AI security risks around data management.

Robert Haist explains why this is the case:

"AI tools rely on data. It isn't always clear to an employee without technical or legal expertise what the terms and conditions mean regarding data collection and how it's used to retrain models. This causes some concern in businesses, such that if an individual puts confidential data into a public rather than enterprise AI solution, this insight will be absorbed and could be shared with other users. What's more, if the correct exclusions aren't applied to websites, crawlers can access and incorporate data that wasn't intended to be publicly available. In both cases, this presents a significant risk but it is one that can be mitigated through education and robust security processes and shouldn't hold back the use of AI."

Unlike in other areas where greater AI use and understanding increase respondents' comfort with the technology, when it comes to security, apprehension rises in line with AI knowledge. This is undoubtedly due to a more comprehensive awareness of the threats and their seriousness. This trend is clearly illustrated by high levels of concern in the IT industry (79%). As well as comparatively low levels of concern in countries such as Germany (55% – the lowest by far of all countries) which rate their AI use as less mature. Logically, concern levels also increase among those who would ultimately be held responsible for any breaches. For example, 74% of ITDMs report concerns around security risks, with a substantial third (35%) saying they are very concerned.
This drops by almost half among OTDMs (19%). Similarly, just 16% of Junior Managers are very concerned, compared to a sizeable 61% of C-level respondents, with a further 26% of the C-level saying they are slightly concerned.

Security risks around data management in the use of AI



AI can be a security angel as well as a devil

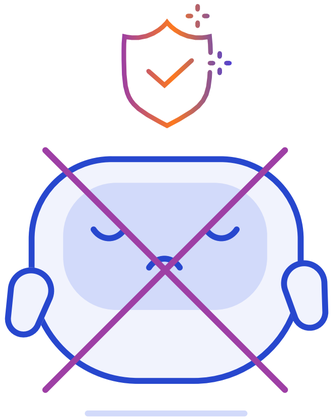
It's worth acknowledging that AI doesn't just create security threats. It also supports the mitigation of them, and C-level respondents are the biggest proponents of this. In fact, when asked what the biggest consequences of not embracing AI are, they rated the increased risk of security threats and breaches as their second largest concern (cited by 29% of respondents).

Security concerns aren't stopping people from using AI or betting on their capabilities

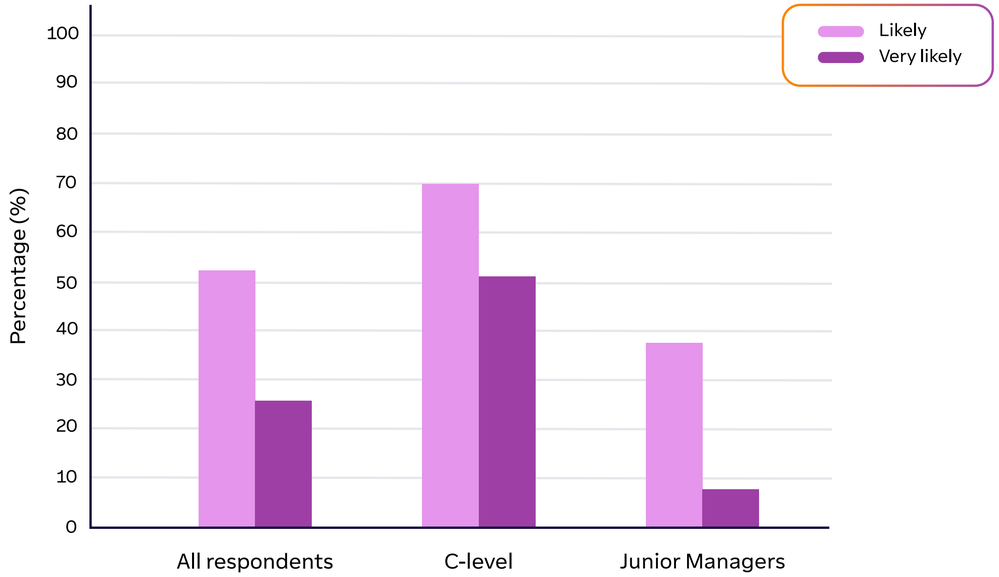
Despite a level of security unease, most decision makers are comfortable continuing to use AI but are doing so carefully. Just 1 in 10 (11%) say security concerns prevent them from using AI, while the majority (64%) say they use AI cautiously with security measures in place. This is highly positive as a lack of cautiousness would be foolhardy in today's challenging security landscape where cybercriminals often earn their living from human error.

It is interesting to note that although ITDMs are more likely to personally approach AI use cautiously (67%), the C-level are significantly less likely to (49%), perhaps indicating a difference between how much they trust themselves with AI versus their colleagues.

This theory is supported by C-level responses when ITDMs were asked if they're likely to consider banning the use of AI outside of their organisation's IT teams due to security concerns. While ITDMs, on the whole, are split on how much they trust their co-workers not to create AI security risks – around half (52%) are likely to contemplate banning it outside of IT – this figure rises to 70% amid C-level ITDMs. With 51% labelling it very likely; 25 percentage points above the average of 26%. This spike can be explained by the fact that they would be the individuals answering to their board and governing bodies if they were subject to an attack.



Seniorities' views on restricting AI use over security concerns



Robert Haist comments:

"The C-level are used to reacting to fast-moving markets and public opinions, but with aspects like technology, they rightly take a more cautious approach. There has also been a lot of speculation and some uncertainty when it comes to AI so it is understandable they are more concerned allowing those outside of IT teams free reign. These worries need to be managed through strict security measures and training as limiting AI to certain teams will ultimately stand in the way of innovation."

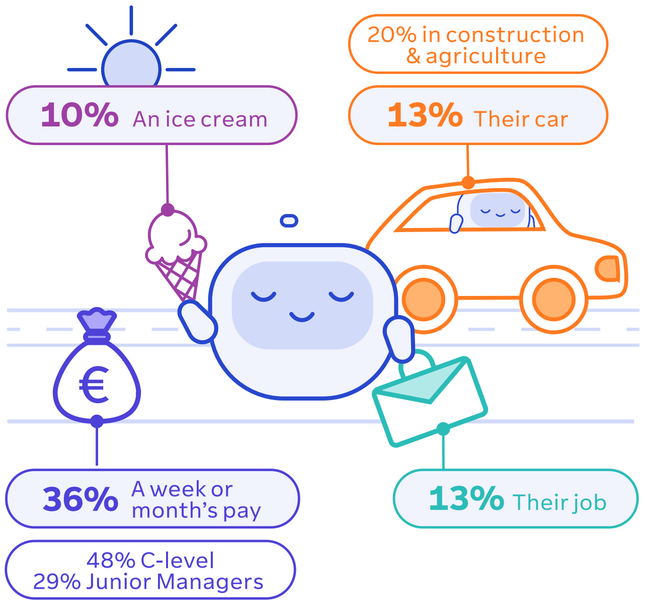
Despite all of these concerns, two-thirds (67%) of respondents would be willing to make bets on their organisation's ability to manage AI-related risks including data management, limited skills, or employees using unapproved tools.

More specifically, over a third (36%) would wager a week or month's pay on their abilities, a figure that jumps up to 48% among the C-level, whose confidence is renewed to the extent that 13% would even be comfortable betting their job.

Robert Haist explains: "It's part and parcel of the C-level role to lead with confidence and to take the necessary steps to mitigate any risks, so it isn't a surprise that this group is positive in its capabilities to do just that. While AI has moved past the hype phase, there is still a lot of experimenting and fine-tuning to be done. And one aspect of this is any potential risks, whether due to data privacy or how it impacts people's role.

To mitigate this, the C-level need to ensure their organisations invest in the skills and complementary technology required to strengthen their AI-specific security."

Confidence in AI risk management: how much are leaders willing to bet?



Concerns over AI usage need to be managed through strict security measures and training, as limiting its use to certain teams will ultimately stand in the way of innovation.

Robert Haist
CISO at TeamViewer

Investing in AI and unlocking the future

Investing in AI and unlocking the future

Overcoming concerns and focusing on practical implementation will be key to unlocking the future of AI. But what are the key things that need to change for AI uptake to increase? And, with these acted upon, what might the future of AI in the workplace look like?

Practical steps for AI introduction

People are tired of the puffery around AI, but not the technology itself; they want clear guidance on how it can be used. In support of this, the majority (61%) agree that the AI hype cycle is over and what they now need is practical uses of AI for their business.

This concept most strongly resounds with the individuals leading the AI charge – from ITDMs (65%) to the IT industry more generally (72%), as well as the C-level (75%). Similarly, these groups are much more likely to agree that they must better democratise AI in their business – in other words, make it accessible for employees regardless of their role.

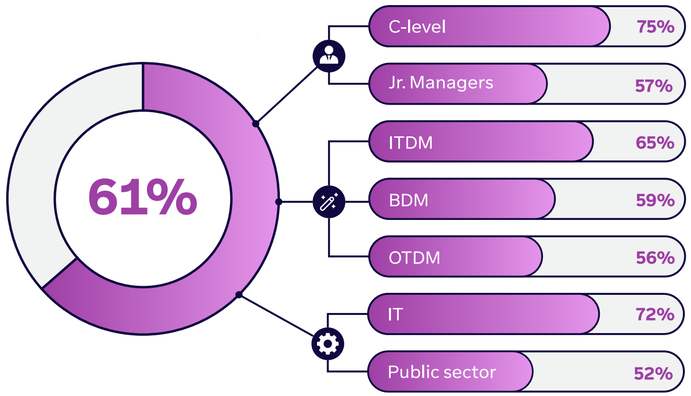
For instance, 77% of ITDMs, as well as 83% of the C-level and those in the IT industry, agree this is needed compared to a 72% average across all respondents. Both sets of findings can be seen as encouraging as these groups are key to facilitating the permeation of AI throughout all teams and workflows in their organisations, so it's important they recognise where change is needed.

Meanwhile, lower levels of agreement among those who use AI less indicate that more education is required for them to appreciate how greater access to AI could benefit them at work.

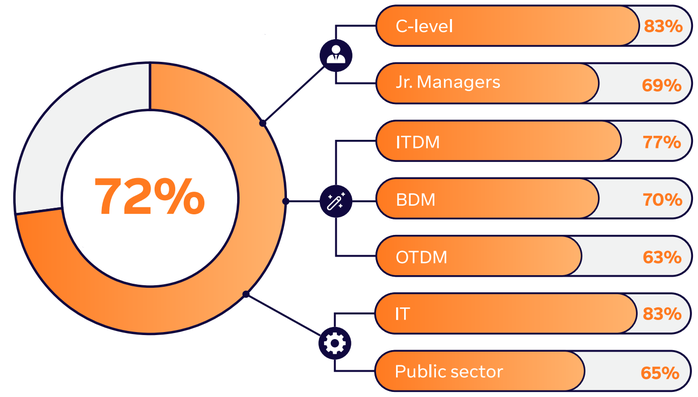
Overcoming concerns and focusing on practical implementation will be key to unlocking the future of AI.

AI beyond the hype: democratization and practical use through training

AI hype is over: now it's about practical business use



Agree AI must be democratised, with training as key



Greater consistency is needed in AI investment

Education is also key to raising awareness of the importance of AI investment. Especially among industries, such as the public sector & education, that are currently lagging behind and are less likely to agree that their organisation should invest in the technology.

Only 60% of respondents in this sector agree that investment is required, well below the average of 72% and significantly lower than their counterparts in industries that are better acquainted with AI and its benefits. Industries such as IT (83%), construction & agriculture (80%), and manufacturing (78%) have a strong appetite for investment; indicating that they're keen to reap even greater rewards from AI.

Despite mixed opinions on the importance of AI investment in the public sector & education, it's promising that almost 3 in 4 (74%) say they anticipate their organisations' investment in AI will increase over the next 6-12 months; a positive change that will be key to preventing the industry from falling further behind.

However, the same cannot be said for all countries. For example, as German respondents rate themselves as less mature when it comes to AI, we might expect them to want to invest to catch up. Yet, a smaller percentage of them (65%) than the average say their organisations will be increasing their investment.

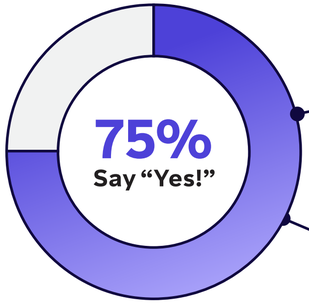
Hendrik Köhler suggests why this might be:

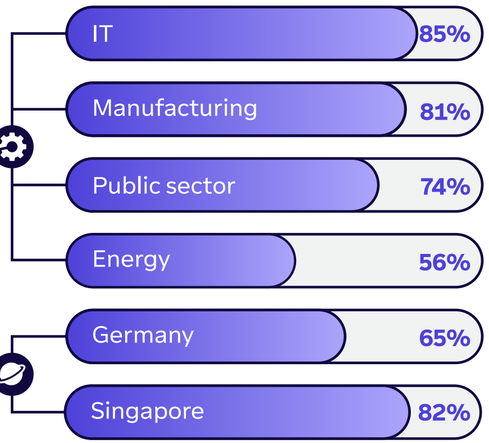
"German respondents may believe their existing IT infrastructure is sufficient and what they really need to prioritise is establishing the necessary regulations and data protection mechanisms for AI to be implemented safely. Although this makes innovation more challenging, these measures are important in all regions."

Mei Dent adds:

"We need to openly and inclusively debate what investing in AI looks like, and the pros and cons of different approaches so we can establish the best path forward. Only by doing this can we ensure that AI delivers a competitive advantage, regardless of where in the world you are."

Will AI investments increase in the next 6-12 months?





Rigorous, well-communicated training is key

Training is one of the key forms of AI investment required. It is a vital tool for increasing understanding of and access to AI and in so doing democratising it. It's reassuring, therefore, that 76% of respondents say their organisation has provided formal training on how to upskill or reskill employees to work alongside AI.

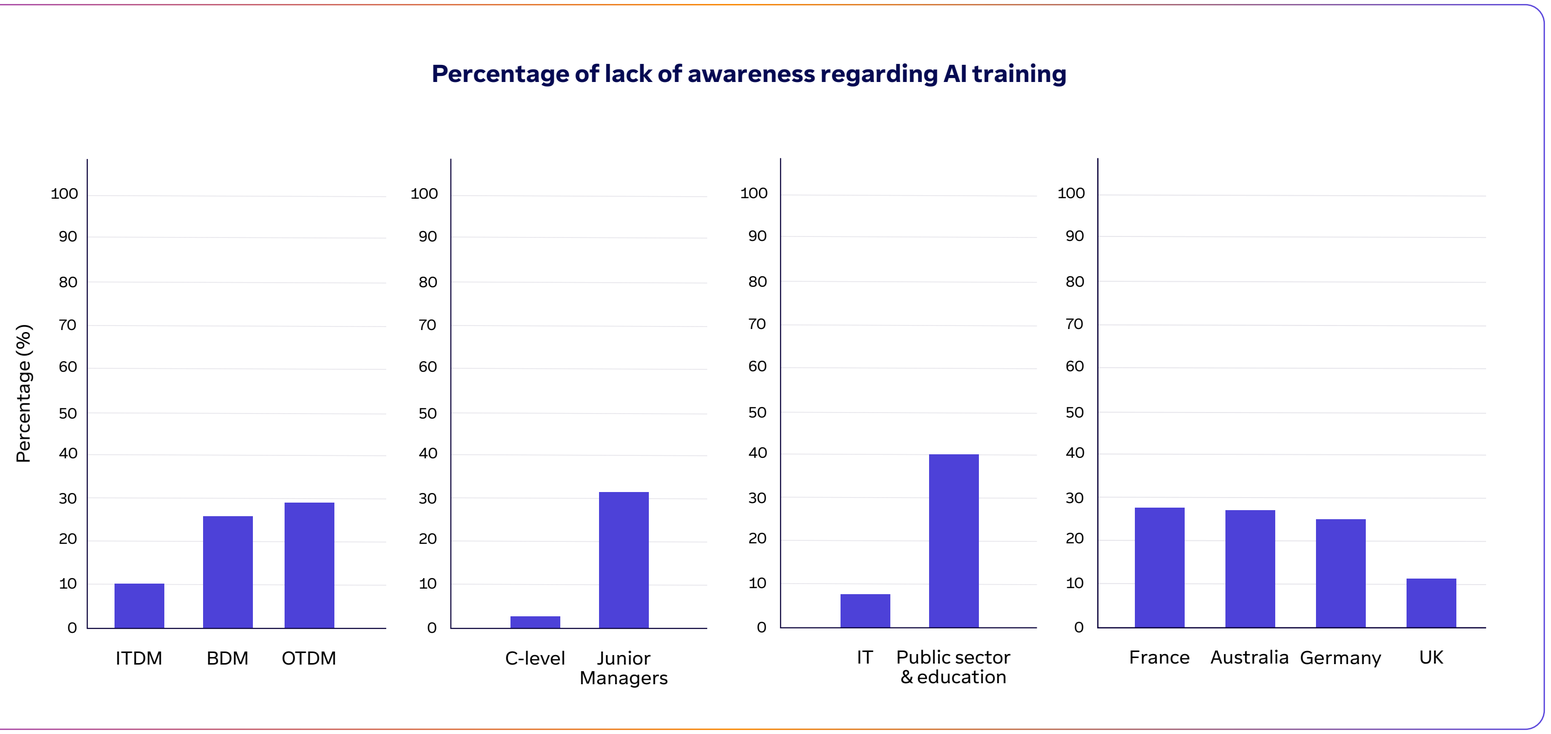
Unsurprisingly, the industries that are using AI the most and are more likely to say their AI use is mature, are also more likely to have received training. 80% of those in finance banking & insurance have had AI training, second only to those in IT at 90%, and shortly followed by construction & agriculture and manufacturing, each at 78%. Whereas only 48% of those in the public sector & education say they've been trained in AI, helping to explain why they see fewer business and personal benefits from the technology, not least regarding time savings.

Mirroring this trend, it's notable that staff at different levels of seniority have received different levels of training and also have different perceptions of how rigorous it was. For example, only 4% of the C-level haven't been AI trained, and, of the 96% who have been, 42% say the training was extensive. Meanwhile, 39% of Junior Managers say they haven't been trained, and only 7% of those who have been feel their training was extensive. These differences help to explain each group's perception of AI while highlighting the importance of the balance being redressed in new AI education.

Over half (54%) of respondents say they would like more AI training. This desire is particularly high among sectors, such as the public sector & education (67%), as well as among Junior Managers (66%) who've had less training. This demonstrates that these individuals are keen to embrace AI, they just need support to empower them to do so.

Existing AI training vs. desire for additional training

Furthermore, almost all respondents (94%) say more training is needed to mitigate the risks of AI specifically. This is a consistently highly held belief across all countries, decision maker types, company sizes, seniority levels, and industries; reflecting the seriousness of security concerns. Given this, it's promising that, overall, 72% say their organisation will provide more training in the next 6-12 months. Countries such as the UK and Singapore are the most confident that this support is forthcoming (84% and 81% respectively), while 81% of ITDMs and 90% of the C-level also confirm additional training is on the horizon. All of which suggests a strong recognition of the need for ongoing education and skills development in AI.



However, when we delve deeper into the demographic splits, worrying findings emerge within certain groups, specifically on their awareness of upcoming training. 40% of those in the public sector & education don't know if their organisation will be supplying more AI training within the next year. Uncertainty is also seen in France (27%), Australia (26%), and Germany (24%), as well as among BDMs (24%), OTDMs (28%), and Junior Managers (32%).

It's conceivable that some of these individuals don't know about future training because their organisations haven't planned any for them. However, it's also feasible that training schedules have been made but not communicated, a theory supported by ITDMs and C-level respondents stating there will be upcoming training. While a lack of communication is problematic and needs to be resolved, it is less troubling than the alternative; these groups are most in need of AI training to help them achieve the uptake and benefits their

counterparts are already enjoying.

Hendrik Köhler comments:
"To improve AI standards, it's essential for organisations – especially in less AI-developed sectors – to assess the training they've already delivered. This will enable them to identify any gaps and bolster their plans for upskilling employees in all teams and at all levels of seniority. Crucially, they then need to clearly communicate this to teams so they can see the roadmap ahead."

AI specialists are required to lead the charge

Training is essential, but it is only one aspect of investment required. Organisations also need specialists to guide their AI charge.

When it comes to the current implementation and control of AI, more than half (55%) say this responsibility lies mostly with IT Directors, followed at a distance by Business Directors (29%) and Digital Transformation Officers (26%).

However, more specific personnel are needed. Almost two-thirds (64%) agree their business needs a Chief AI Officer to clearly spell out their AI strategy. Among decision maker types, this view is mostly strongly held by the group typically responsible for AI – ITDMs (70%) – illustrating an awareness of their own limitations. In addition, the overwhelming majority (83%) of C-level respondents say Chief AI Officers are needed. Given that C-level personnel have the power to implement this change, it's likely we'll see this role emerge in an increasing number of organisations over the coming months and years.

> It's clear that beyond general investment, practical steps are required to convert AI from hype to reality.
>
> Hendrik Köhler, VP of IT Infrastructure & Operations at TeamViewer

Hendrik Köhler remarks:

"It's clear that beyond general investment, practical steps are required to convert AI from hype to reality. Specialist personnel are key to this thanks to their ability to bridge the AI knowledge gap. We know that an incomplete understanding of any technology will make decision makers shy over its introduction. Chief AI Officers have the power to overcome this, for example, by bringing enhanced insight into how to tackle data security challenges. With these individuals in place, AI adoption can safely reach the next level."

AI – the great equaliser

The need for AI investment in the form of training and specialist personnel is clear, as is its potential to unlock opportunities for businesses and individuals. But what many people may not realise is that this investment could contribute to the future of equality in the workplace – including for parents, caregivers, and those managing illnesses or disabilities.

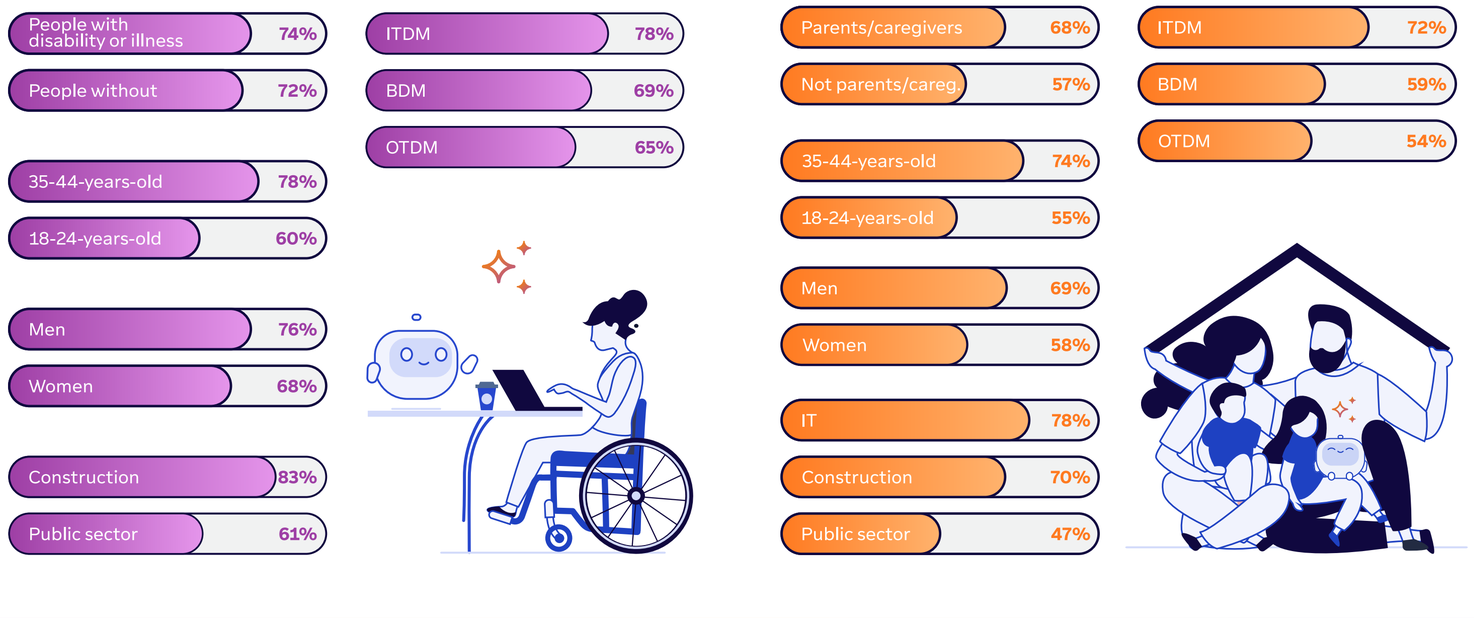
Rather than accentuating opportunity disparities, 73% of respondents agree AI can help increase accessibility in the workplace, a belief upheld by those who have a disability or illness (74%). And, as usual, those who work most closely with AI have the greatest faith in its ability in this area.

Similarly, when asking about equality opportunities for parents and caregivers, those with AI expertise acknowledge its capacity to make a difference. However, parents and caregivers are also significantly more likely than those without dependents to acknowledge its equalising potential (68% compared to 57%).

This suggests that it takes experiencing certain situations to fully value AI's power. And perhaps life experience is also why those in the 35-44-year-old age bracket are much more likely than 18-24-year-olds to acknowledge a link between AI and equality.

It's also significant that although AI is typically seen as a tool most suited to white-collar industries, respondents in construction & agriculture are more likely to say AI is increasing workplace accessibility (83%) than any other sector. They are also among the top sectors for recognising AI as something that can help create equal job opportunities for those with dependents. Clearly, these findings are busting the myth that AI doesn't have a clear place in the blue-collar world.

AI: enhancing workplace accessibility and equal job opportunities for caregivers



Constanze Backhaus, Chief Human Resources Officer, comments on the findings:

“AI offers immense potential for fostering equal opportunities in the workplace by supporting employees in overcoming challenges and streamlining tasks at all levels. For example, AI-powered tools can enhance communication by translating languages in real-time or generating accurate transcripts of meetings.

They can also assist in reading and writing, improving clarity and accessibility for all employees. Beyond just enhancing productivity, these tools enable more seamless collaboration across departments and roles, ensuring that every individual, from desk workers to frontline staff, can contribute effectively to the organisation’s success.”

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Beyond enhancing productivity, AI tools enable more seamless collaboration across departments and roles, ensuring that every individual, from desk workers to frontline staff, can contribute effectively to the organisation’s success.

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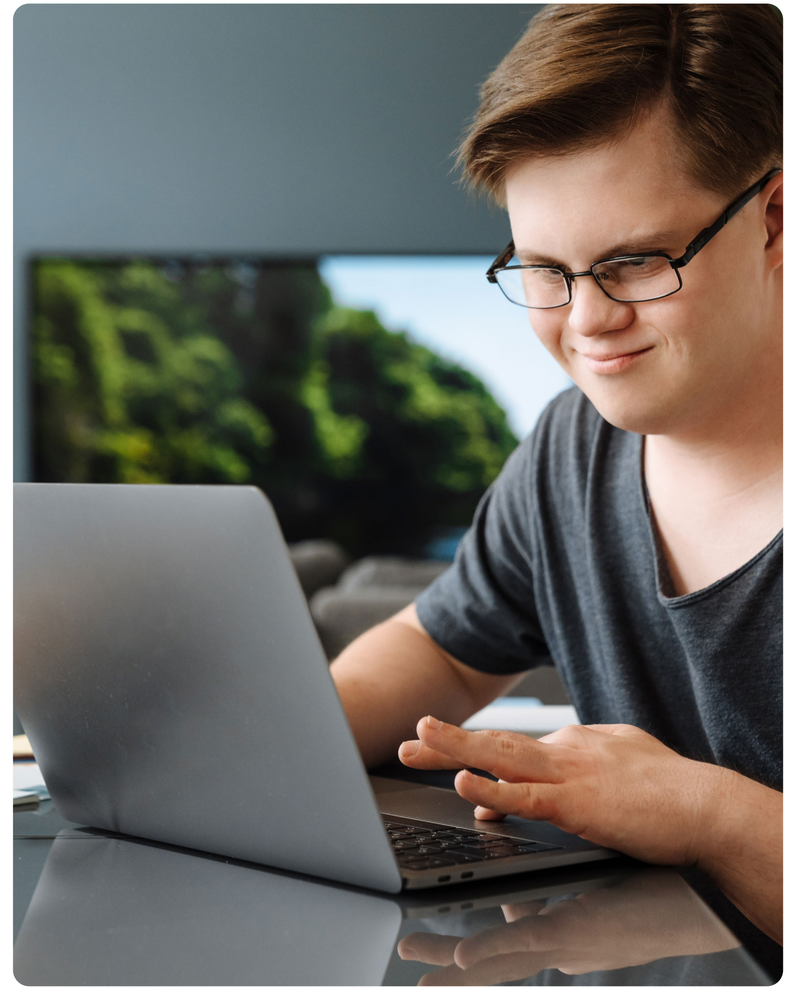


Make four key changes

Make four key changes

AI has burst into the workplace and it's here to stay. Most decision makers have welcomed their new colleague, but their use of AI, perceptions of their organisation's AI maturity, and their personal confidence and competence vary. Depending on not only the focus of their role and their seniority, but also their company's size, industry and country.

Those groups that are further on in their AI adoption journeys offer a tantalising insight into what can be achieved through AI. Thus, the more AI is used, the more advanced and impactful the benefits that can be unlocked for all types of workers and organisations. They also signpost how others can join them in the AI-empowered workplaces of the future.

To support certain demographics in their quest to catch up and empower those who are leading the way to continue advancing, there are several key actions organisations should take.

01

Prioritise two-way communication and tailor it to your audience

The research findings have made it clear that within organisations there's misalignment between teams and employees at different levels of seniority. This is particularly obvious among ITDMs and OTDMs. The latter group consistently had less confidence in AI as a tool for driving benefits such as efficiency, productivity, innovation, and growth. This is rooted in the fact that they are less likely to use AI. From here, a self-perpetuating cycle ensues where they don't use AI because they don't believe it will benefit them, and they can't see the benefits because they aren't using it. Communication is the key to breaking this cycle.

IT teams who are leading the introduction of AI need to take the time to understand the challenges OTDMs are facing, find out what they need, and communicate in language that will resonate. All before agreeing on a common set of KPIs to guide their AI integration. Proactive communication is also vital to establishing when personnel feel less confident about using AI and if they need more training to use it effectively, including putting things in layman's terms. What's more, IT teams and senior personnel need to better communicate their upcoming AI training schedules so those in operational and business roles can be assured that support is on the horizon.

02

Education is one of the most powerful tools in your arsenal

We know there are several barriers to AI adoption, and these vary significantly, so there isn't a one-size-fits-all solution to overcoming any resistance to AI. However, one obstacle that consistently resurfaces is education, making it a clear element required in any successful AI adoption strategy.

This education can't just be supplied to ITDMs, the C-level, or in industries that already have a solid AI foundation to build on. Non-IT personnel, junior employees, and individuals in sectors less used to AI need equal access to training. This doesn't mean providing identical programmes for all, but rather being dedicated to rigorous training tailored to each audience's level of understanding and needs.

03

Invest in a Chief AI Officer to lead the safe integration of AI

The research shows that security risks are the key concern that increases with greater AI use and awareness. And that people are sufficiently worried about this to consider banning the use of AI outside of IT teams. However, it also reveals that AI is seen as a vital tool for mitigating security threats and that a sizeable number of people would be willing to bet their paycheck on their organisation's ability to manage AI risks.

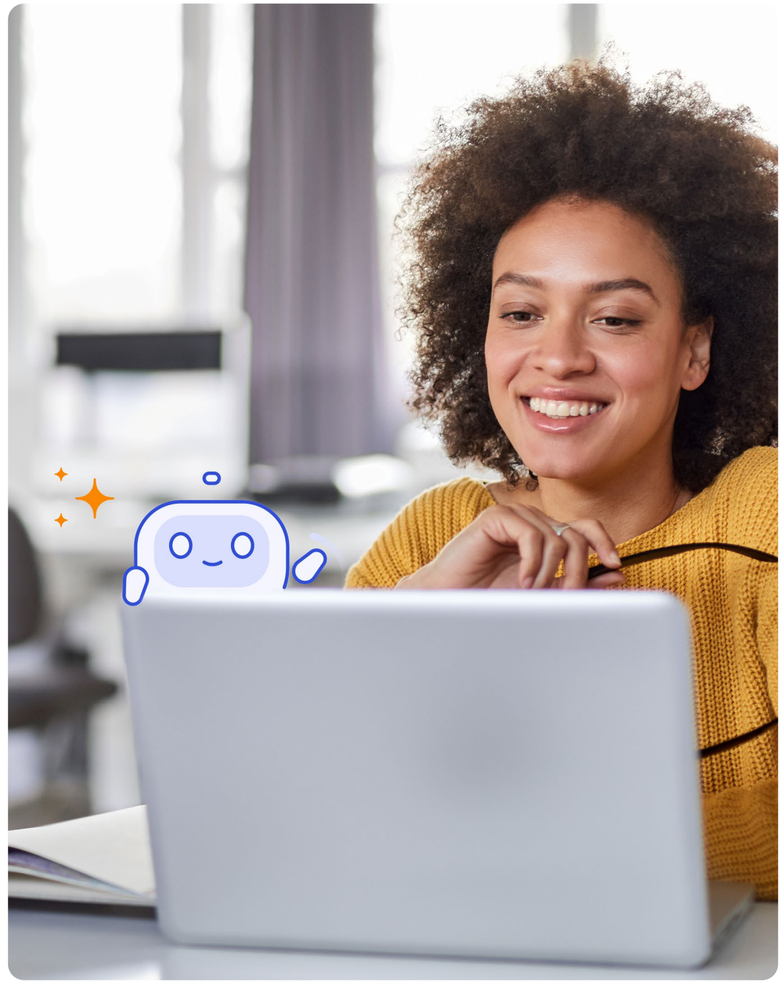
To ensure AI can continue to be used across all areas of the business safely, and people don't lose their pay on a bet, organisations should invest in specialist staff. Namely, a Chief AI Officer to guide the safe and responsible integration of AI throughout their company. It's particularly vital that businesses in less mature sectors and countries consider this to prevent themselves not only falling further behind but also falling victim to a new realm of threats.

04

Embrace AI for the benefit it delivers for individuals; this will also mean wins for the business

AI delivers countless business benefits, but perhaps its most impressive capabilities lie in what it can deliver for individual employees. From time savings to greater capacity to do strategic work, AI is enabling workers to learn new skills and advance their careers. Yes, this is fantastic for them as individuals, but it is also central to organisation's booming productivity and improved financial outcomes.

What's more, these benefits are available to all staff, but AI has the potential to make even bigger differences for those traditionally disadvantaged in the world of work. Namely, improving accessibility for individuals with disabilities and illnesses, and creating equal job opportunities for parents and caregivers. This in turn gives organisations access to a richer bench of diverse talent, improving their industry competitiveness. All of this to say, if you focus on delivering AI tools that work for your people, your people will deliver better business outcomes for you.



Research methodology

Research methodology

The quantitative research for this report was conducted by Sapio Research, an independent research consultancy based in the United Kingdom.

The survey was conducted among 1,400 IT DMs, BDMs, and OTDMs in companies with 200+ employees across the UK, France, Germany, Australia, and Singapore and 500+ employees in the US.

The interviews were conducted online by Sapio Research in August and September 2024 using an email invitation and an online survey.

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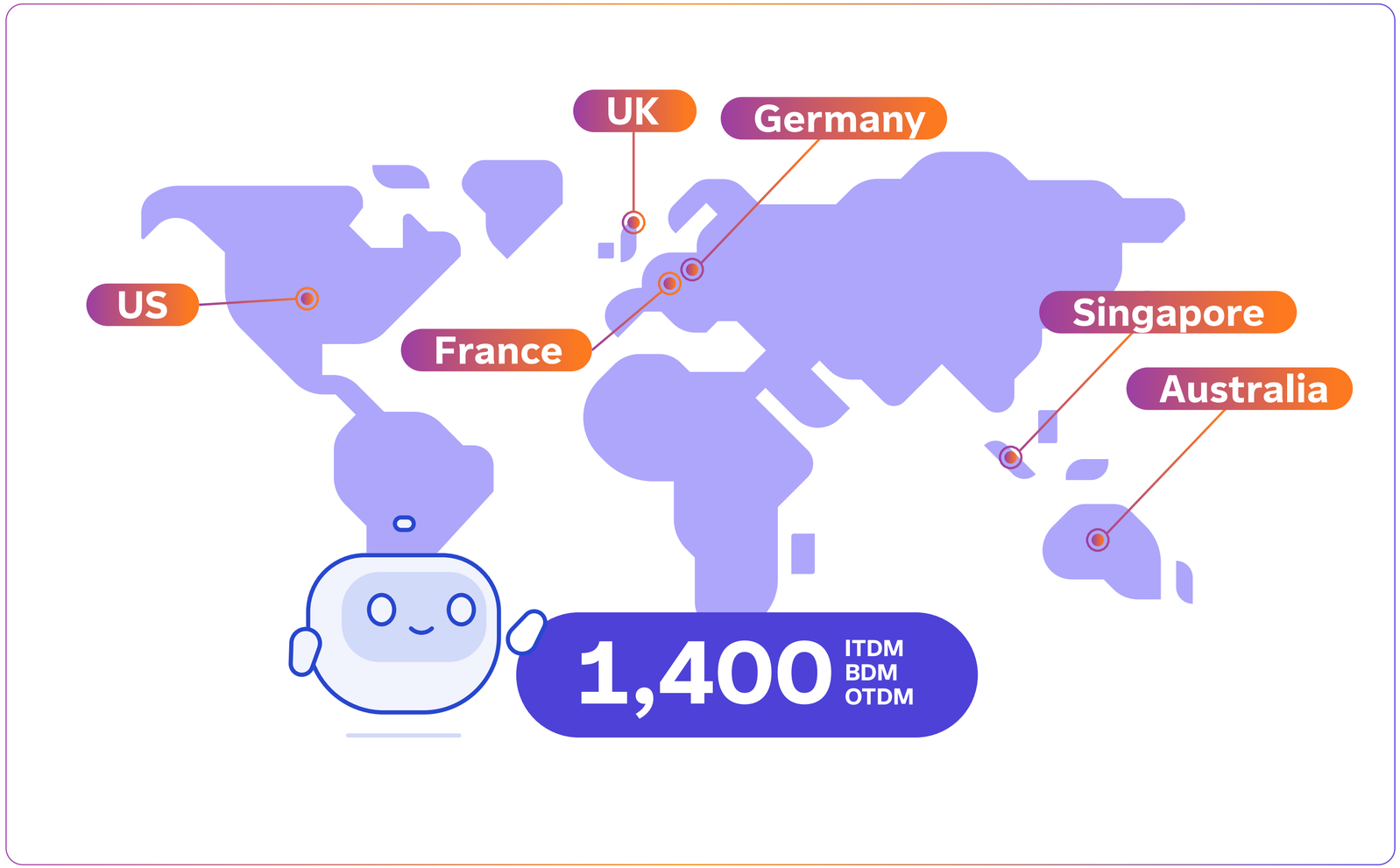

TeamViewer is a leading global technology company that provides a connectivity platform to remotely access, control, manage, monitor, and repair devices of any kind – from laptops and mobile phones to industrial machines and robots. Although TeamViewer is free of charge for private use, it has around 640,000 subscribers and enables companies of all sizes and from all industries to digitalize their business-critical processes through seamless connectivity. Against the backdrop of global megatrends like device proliferation, automation and new work, TeamViewer proactively shapes digital transformation and continuously innovates in the fields of Augmented Reality, Internet of Things and Artificial Intelligence. Since the company's foundation in 2005, TeamViewer's software has been installed on more than 2.5 billion devices around the world. The company is headquartered in Göppingen, Germany, and employs more than 1,500 people globally. In 2023, TeamViewer achieved a revenue of around EUR 627 million. TeamViewer SE (TMV) is listed at Frankfurt Stock Exchange and belongs to the MDAX. Further information can be found at www.teamviewer.com.

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