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Why AI PCs Are Top of Mind for End Users and ITDMs

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Abstract: AI is transforming the role of PCs in organizations, shifting them from commodity tools to critical components of productivity and corporate strategy. Research commissioned by Dell Technologies and Intel® highlights this shift and revealed that AI capabilities have surpassed security and compliance as the top driver of endpoint purchasing decisions. As AI workloads increasingly execute locally on devices supported by advanced hardware like Dell's AI PCs, organizations have an opportunity to enhance security, efficiency, and collaboration while preparing for the growing influence of AI across the business.

Overview

As AI usage in organizations heats up, the workloads that benefit from AI are extending beyond the confines of the cloud and backend processes, getting closer to the end user and affecting decisions that relate to the end-user experience, endpoint security, and the devices themselves. This, coupled with the end of life for Windows 10 and the fleet-wide upgrades that it necessitates, means that the desktops and laptops that were once minimized as commodity tools are becoming integral to employee productivity and overall corporate AI strategy.

To better understand this, Dell commissioned TechTarget's Enterprise Strategy Group to conduct research into the interest, usage, and outcomes of AI on PCs and laptops, and the findings were very interesting.

Historically, security has been the number one response in any research project that asks about broad trends that affect PC purchasing, but this research determined that adopting AI technologies and capabilities has usurped security and compliance (see Figure 1).[1] This is, perhaps, the strongest indicator of the effect AI is poised to have on end users and their devices.

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[1] Source: Enterprise Strategy Group Custom Research commissioned by Dell, *Client Trends and Competitive Landscape*, June 2024.

Figure 1. Adopting AI Technologies Has Displaced Security and Compliance as the Top Factor in Endpoint Purchasing

Which of these broad factors/trends do you believe will most impact your organization's laptop/desktop purchases in the upcoming year? (Percent of respondents, N=350, three responses accepted)

Adopting AI technologies/capabilities	42%
Security and compliance	39%
Supporting IT/business automation	30%
Consolidating IT vendors	28%
Addressing IT skills gaps/a lack of staffing	25%
Supporting sustainability initiatives	23%
Responding to business growth	23%
Enhancing employee experience	22%
Enabling the distributed/hybrid/remote workforce	19%
Enabling a data-driven company/culture	19%
Enhancing customer experience/loyalty	17%

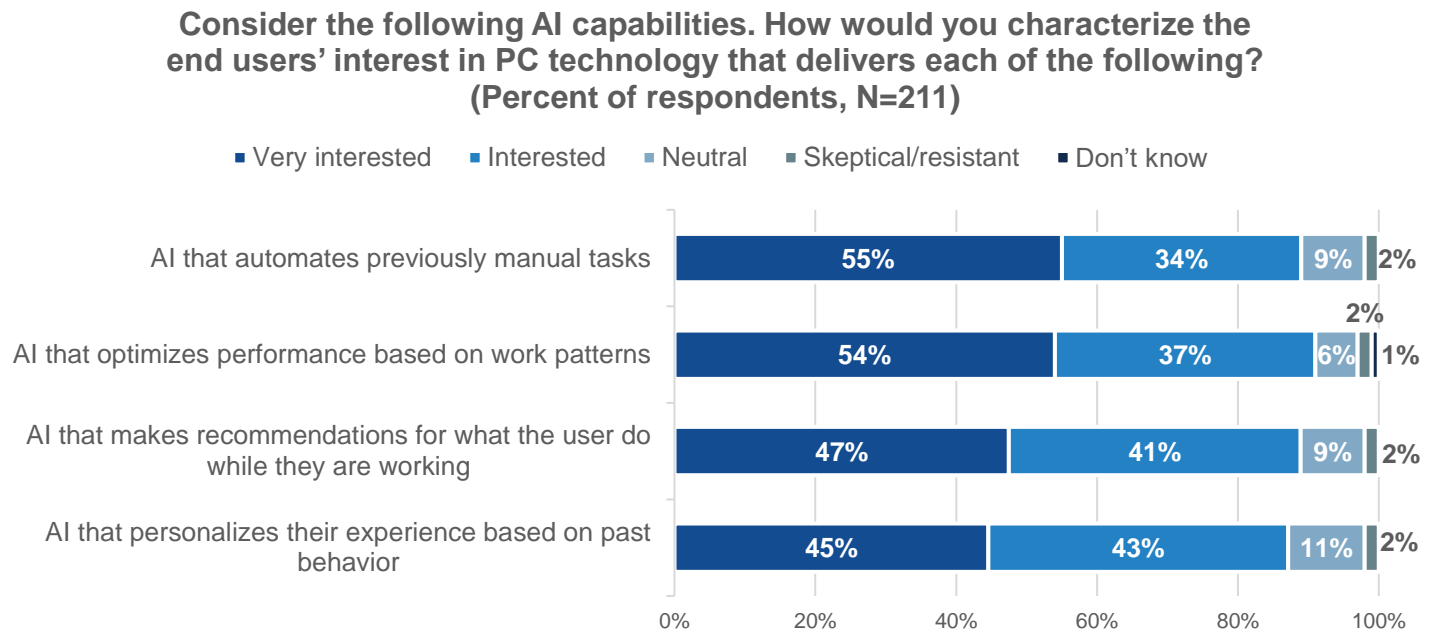*Source: Enterprise Strategy Group, a division of TechTarget, Inc.*

It's also confirmation that, despite the lack of a single, must-have app that would launch AI to the top of every organization's list of priorities, AI is affecting every aspect of the end-user experience—in addition to affecting the business at large.

Early Data Exceeds Expectations

As with any emerging technology, it's important to get a handle on the actual experience that organizations are having relative to their expectations, especially since the two aren't always closely aligned. To quantify this, IT decision-makers (ITDMs) were asked to characterize their end users' interest in various aspects of AI, and the responses showed that an average of 87% were interested or very interested in AI for the purposes of task automation, performance optimization based on work patterns, AI that makes recommendations for how to accomplish work, and AI that personalizes their experience (see Figure 2).[2]

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[2] Ibid.

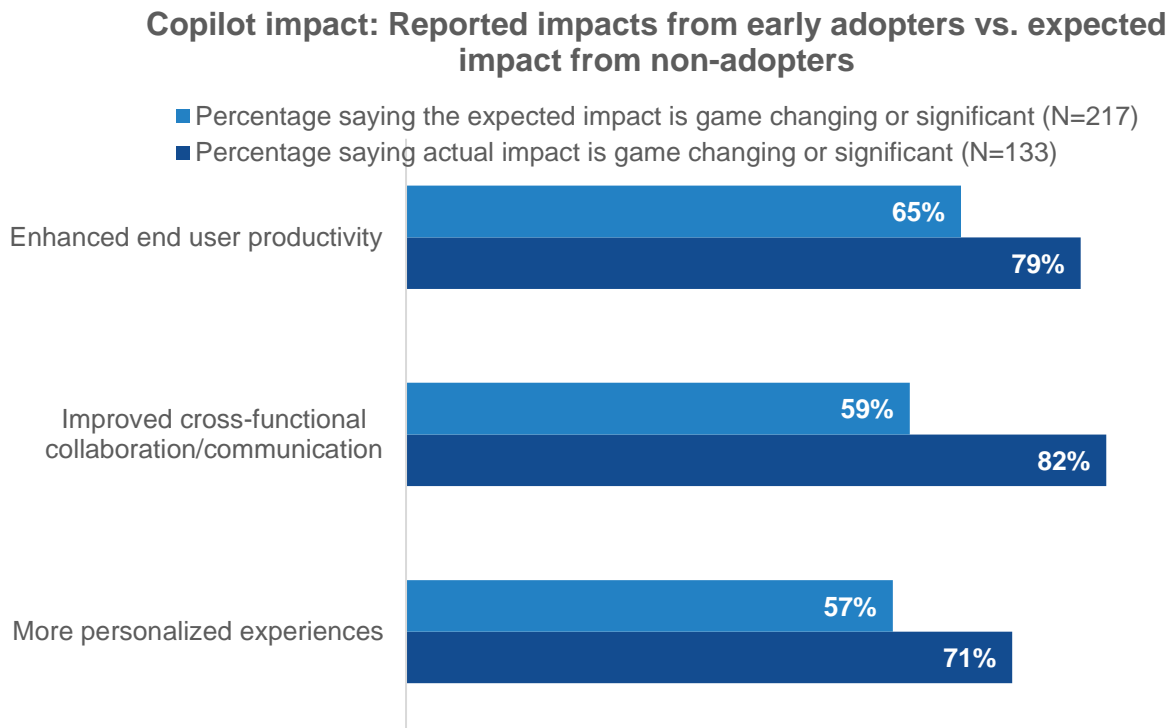**Figure 2.** End-user Interest in AI Capabilities Around Work Efficiency and Experience Are Extremely High

Consider the following AI capabilities. How would you characterize the end users' interest in PC technology that delivers each of the following? (Percent of respondents, N=211)

■ Very interested ■ Interested ■ Neutral ■ Skeptical/resistant ■ Don't know

Capability	Very interested	Interested	Neutral	Skeptical/resistant	Don't know
AI that automates previously manual tasks	55%	34%	9%	2%	
AI that optimizes performance based on work patterns	54%	37%	6%	2%	1%
AI that makes recommendations for what the user do while they are working	47%	41%	9%	2%	
AI that personalizes their experience based on past behavior	45%	43%	11%	2%	

Source: Enterprise Strategy Group, a division of TechTarget, Inc.

In another research project, ITDMs were asked about their expectations and observed benefits with regard to Microsoft Copilot. Among those that hadn't yet deployed it, respondents expressed strong enthusiasm, with a significant majority anticipating that Copilot would have a "game-changing" or "significant" effect. However, among those organizations that had already implemented Copilot, an even greater percentage of respondents reported that the actual effect was indeed "game-changing" or "significant." This suggests that Copilot not only meets expectations but often exceeds them, enhancing productivity, collaboration, and personalization in measurable ways (see Figure 3).[3]

Figure 3. At a High Level, Copilot Is Exceeding Expectations for Productivity, Collaboration, Communication, and User Experience
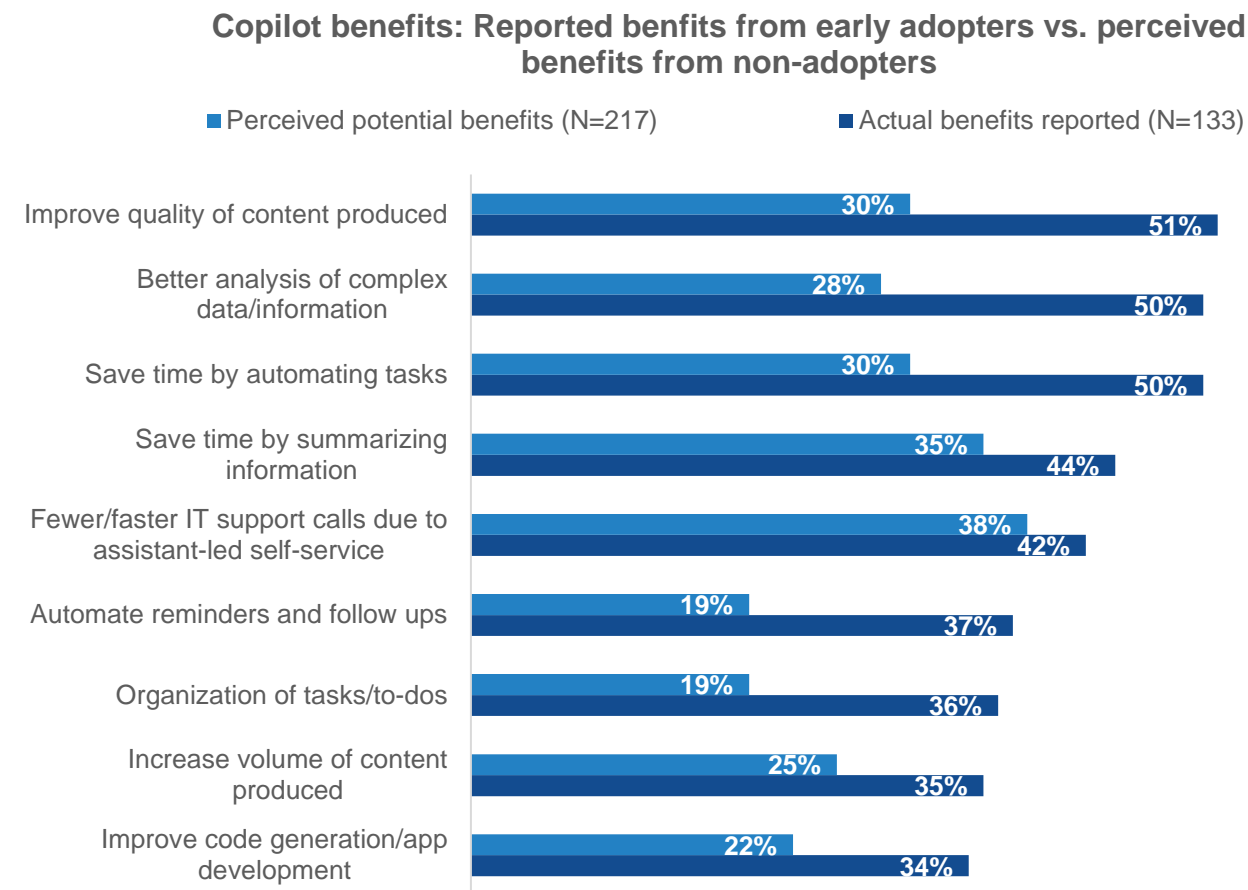
Copilot impact: Reported impacts from early adopters vs. expected impact from non-adopters

■ Percentage saying the expected impact is game changing or significant (N=217)
■ Percentage saying actual impact is game changing or significant (N=133)

Enhanced end user productivity	65% / 79%
Improved cross-functional collaboration/communication	59% / 82%
More personalized experiences	57% / 71%

Source: Enterprise Strategy Group, a division of TechTarget, Inc.

What's more, when looking into day-to-day tasks, this trend continued, with the actual benefits reported exceeding the perceived potential benefits in every scenario (see Figure 4).[4] The most notable areas—improving quality of content produced, better analysis of complex data/information, and task automation—paint a picture of what's possible when adding AI into everyday workflows, and while these data points are specifically related to Windows 11 Copilot, they're indicative of a broader picture where end-user facing AI is poised to make an enormous impact in the coming months and years.

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[4] Ibid.

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Figure 4. Quality Content, Data Analysis, and Task Automation Are Most Impactful, Relative to Expectations, but All Areas Outperformed

Copilot benefits: Reported benfits from early adopters vs. perceived benefits from non-adopters

■ Perceived potential benefits (N=217)   ■ Actual benefits reported (N=133)

	Perceived	Actual
Improve quality of content produced	30%	51%
Better analysis of complex data/information	28%	50%
Save time by automating tasks	30%	50%
Save time by summarizing information	35%	44%
Fewer/faster IT support calls due to assistant-led self-service	38%	42%
Automate reminders and follow ups	19%	37%
Organization of tasks/to-dos	19%	36%
Increase volume of content produced	25%	35%
Improve code generation/app development	22%	34%

Source: Enterprise Strategy Group, a division of TechTarget, Inc.

The AI PC Era Is Upon Us, and Dell Is Leading the Charge

The research data clearly shows that AI capabilities are already exceeding expectations in the majority of real-world implementations. As organizations plan their technology roadmaps, AI-enabled PCs represent an important opportunity to prepare for increasingly AI-driven workflows. And while it's worth noting that the initial experience with end-user usage of AI has largely been a "connected" experience, requiring access to the internet and AI services that relied on the public cloud, more AI workloads are being developed to execute close to the user, even on the endpoints themselves.

This has given rise to a new generation of hardware with unprecedented capabilities, making the PC more central to organizational technology strategies than it has been in years. Dell has emerged as the leader in this new era, offering a broad AI PC portfolio that extends across multiple commercial and consumer lines. These devices feature dedicated neural processing units (NPUs) for efficient AI processing, built on both x86, ARM, and Azure Resource Manager platforms to meet the needs of all end users—no matter which platform they're using.

Considering the benefits the "connected" experience has shown (as outlined above), the addition of local AI processing has the potential to dramatically change everyday computing experiences. Consider communications and collaboration scenarios, where AI processing offers real-time audio and video enhancements through features such as Microsoft Windows Studio Effects. These improvements are crucial for today's distributed workforce, where

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employees need reliable, high-quality virtual interactions regardless of their location or connectivity conditions. Dell has even built AI capabilities into their integrated peripherals, such as AI-based noise-canceling headphones and head-tracking webcams.

The potential benefits extend beyond communications, though. Data processing, security, and task automation all stand to benefit from local AI processing. And because the PC has optimized AI hardware in it, battery life can also be extended. In fact, Intel claims that by offloading capabilities such as auto-framing, background blur, and eye tracking to the NPU in Intel® Core™ Ultra processors, workers experienced up to 38% less processor power consumption when using Zoom. Similarly, Intel boasts a 132% improvement in video editing performance when using Adobe Premier on Intel® Core™ Ultra processors with local AI processing capabilities.

Even Microsoft is expanding Copilot capabilities to leverage local AI processing. Features like live captions enhance communication, while new creative tools streamline content creation and editing tasks. The integration of AI processing at the endpoint also strengthens security, as sensitive data can be processed locally rather than being sent to cloud services.

Dell Stands Out as A Leader

Dell's leadership in the AI PC space stems not just from their expansive portfolio of devices and capabilities, but from their comprehensive approach to implementation. Their security features help protect both traditional and AI workloads, while their commitment to sustainability ensures these advances don't come at the cost of environmental responsibility. Additionally, Dell is an avid user of AI workloads internally, which means their services organization has the expertise needed to help customers select and deploy the right solutions for their specific needs.

As AI continues to reshape all areas of the business, there is significant evidence that it is already having a major impact on productivity and end-user experience. To stay ahead of the curve—and the competition—it's important for organizations to lay the groundwork for future adoption, regardless of where they are on their larger AI journey.

Given the renewed importance of the PC to end-user experience and a successful AI strategy, customers should begin factoring AI capabilities into their endpoint purchasing plans today. Even without a specific workload, laying a foundation now will help effectively prepare for the need when it arrives.

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Source: "Intel Core Ultra Processors (Series 1)," Intel.com, 2024.