Enterprise Strategy Group™
by TechTarget

AI PCs Are Quickly Becoming the Key to Achieving Security and Productivity Goals

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ENTERPRISE STRATEGY GROUP

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Research Objectives

As the very definition of the workplace evolves, the impact of the endpoint on end-user productivity, IT management, and security is under more scrutiny than ever before. Alongside this trend is the adoption of AI, which is rapidly climbing the list of priorities—and challenges—that organizations have.

To gain insight into how endpoint strategies are evolving in response to increased demand on procurement, management, and security resources; the introduction of AI-enabled hardware and software; and the outcomes of early adopters of these AI systems; TechTarget's Enterprise Strategy Group surveyed 350 IT professionals from small and medium-sized organizations (SMBs; 50-750 employees) worldwide who are knowledgeable about their organization's purchase process for storage, servers, and client technology solutions.

THIS STUDY SOUGHT TO:

Measure the needs, expectations, and observed benefits of end-user-facing AI, like AI PCs and Microsoft Copilot.

Examine the benefits Windows 11 migrations are creating for organizations and to what extent they are complete.

Predict the direction of future AI PC hardware investments and the impact AI will have on performance, security, collaboration, and more.

Validate the possibilities of modern hardware and software as they relate to overall business objectives.

Security and AI Are Becoming Significant Factors in Device Purchasing

"44% of SMBs report **security issues and concerns** among their top concerns, while 32% said the same for **elevated costs**."
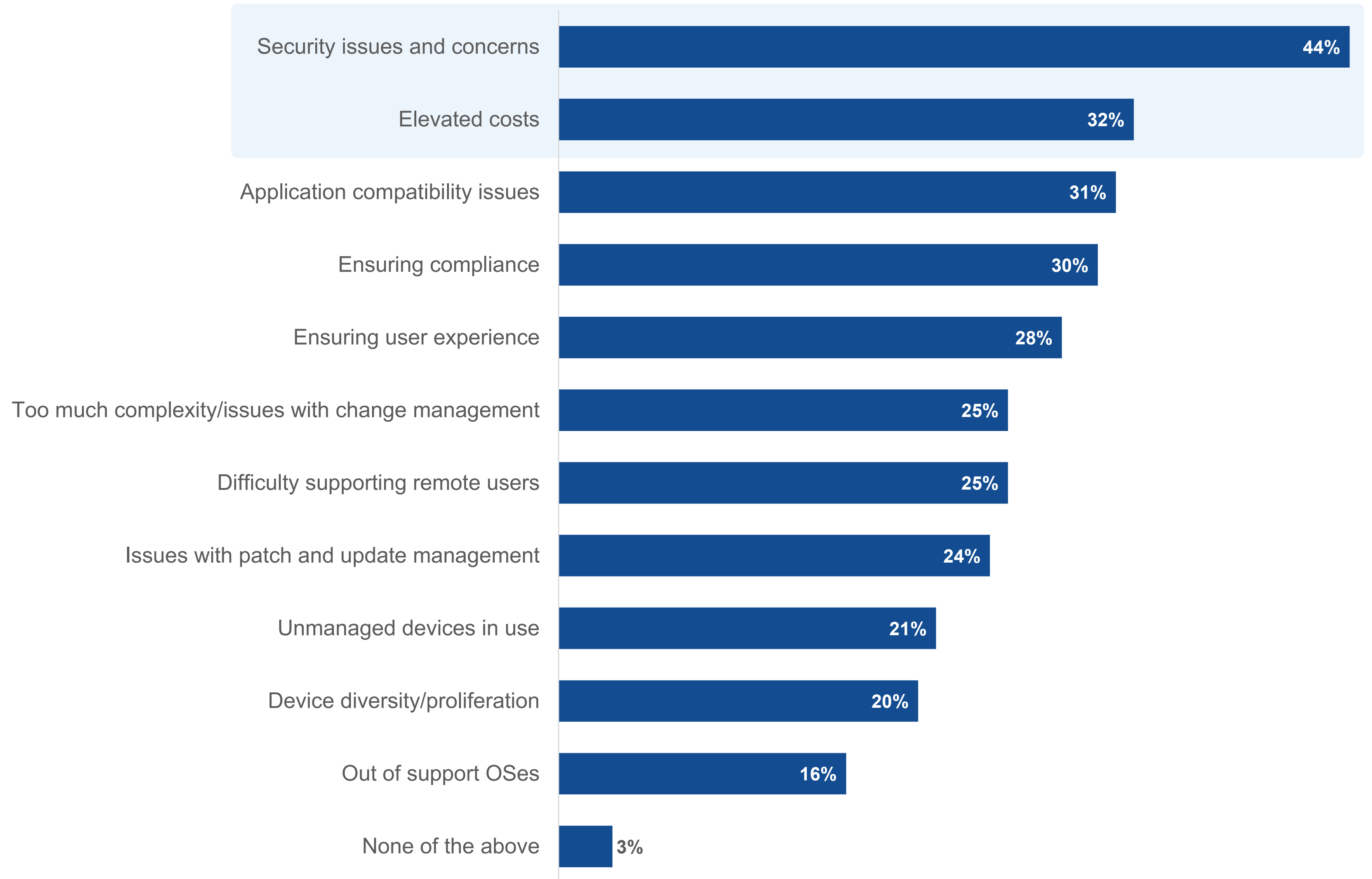
Size Doesn't Matter: SMBs and Enterprises Face Similar Hurdles

SMBs often find themselves caring about the same things as their enterprise counterparts, and this is no more apparent than when looking at security.

Even with smaller budgets and IT teams, 44% of SMBs report security issues and concerns among their top concerns, while 32% that said the same for elevated costs.

But the factors that affect end-user computing (EUC) strategies are incredibly diverse, and security is only part of the story.

Most Significant EUC Challenges

Challenge	%
Security issues and concerns	44%
Elevated costs	32%
Application compatibility issues	31%
Ensuring compliance	30%
Ensuring user experience	28%
Too much complexity/issues with change management	25%
Difficulty supporting remote users	25%
Issues with patch and update management	24%
Unmanaged devices in use	21%
Device diversity/proliferation	20%
Out of support OSes	16%
None of the above	3%

Future Plans Are Equally Mature

When asked about the features most critical to future decision-making, respondents noted that the more familiar answers of reliability and durability, IT manageability and operating costs, and performance outpaced security and AI capabilities (two of the hottest topics today).
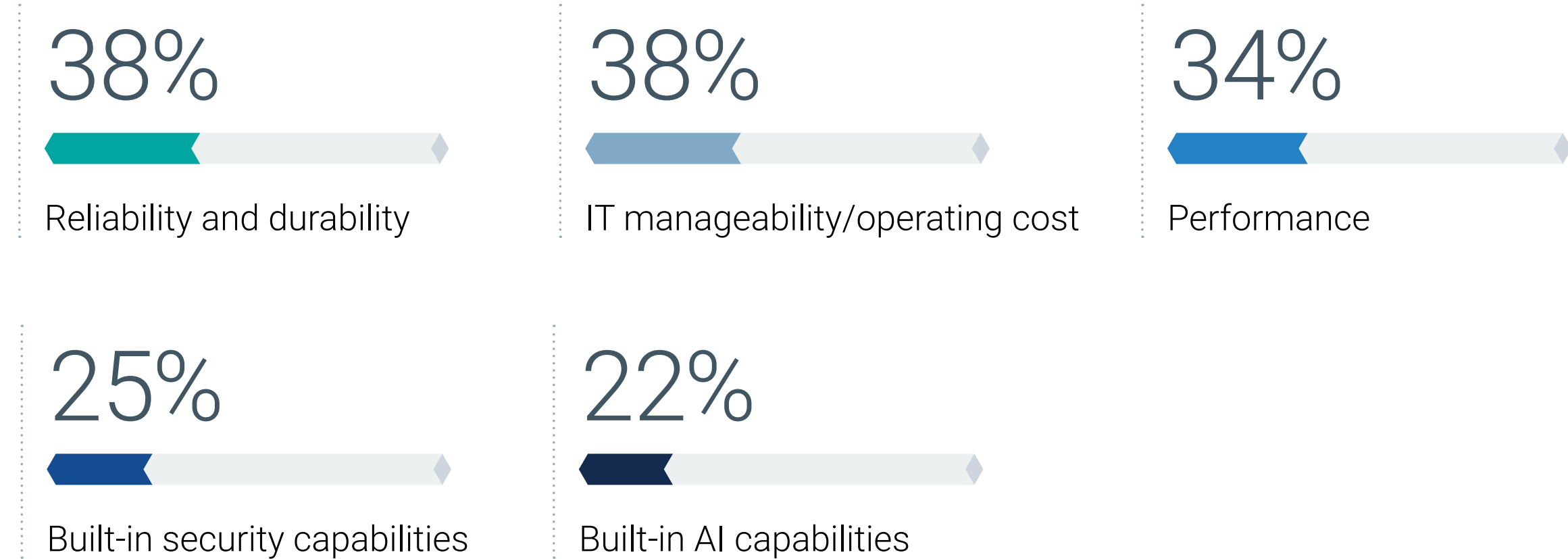
That said, the need for built-in security and/or AI capabilities is rapidly increasing for nearly a third of companies and is increasing in some way for over 80%!

The reason for this is simple: Built-in security and AI features have a lot to do with the other items that outrank it. A PC that's compromised, slow, or lacking in the latest feature isn't always reliable. Additionally, they can generate service tickets and suffer from bad performance.
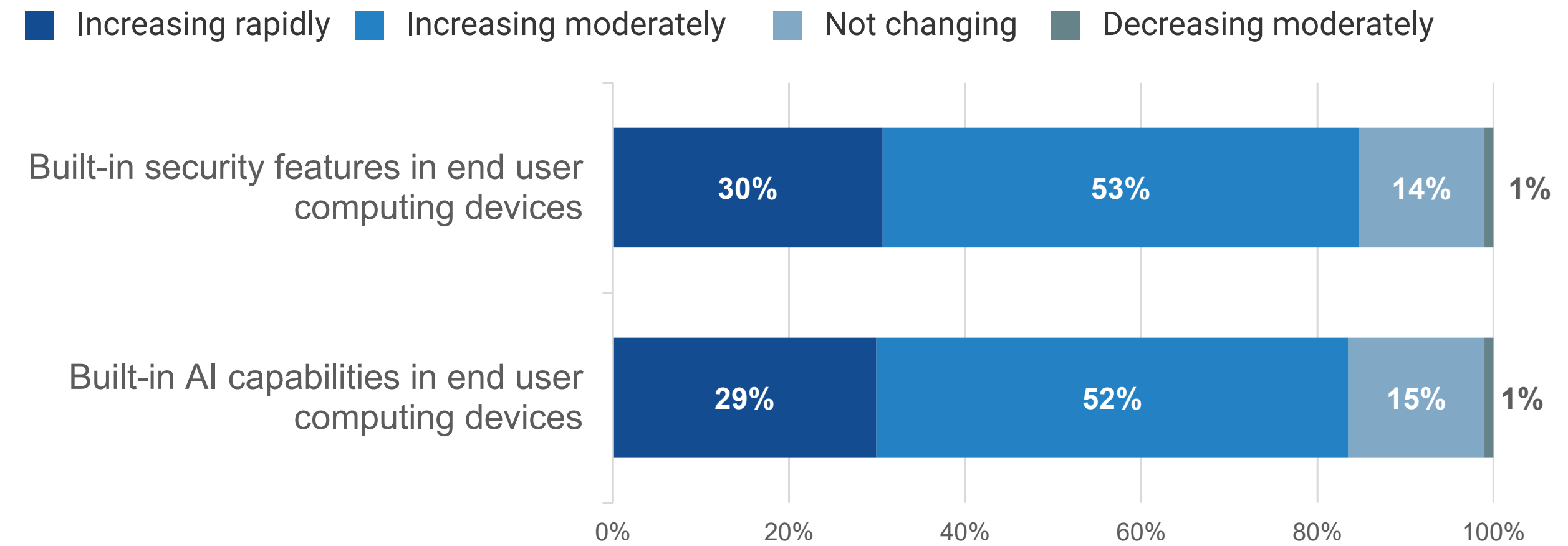
And deploying these features results in real-world benefits, not just vague "possibilities."

This research sought to uncover the benefits customers are experiencing today, not just from AI PCs but from modern hardware and AI services like Microsoft Copilot, and the results are amazing.

Most Critical Solution Characteristics to Future EUC Purchases

38%
Reliability and durability

38%
IT manageability/operating cost

34%
Performance

25%
Built-in security capabilities

22%
Built-in AI capabilities

Importance of Must-have Capabilities

■ Increasing rapidly　■ Increasing moderately　■ Not changing　■ Decreasing moderately

Built-in security features in end user computing devices: 30% | 53% | 14% | 1%

Built-in AI capabilities in end user computing devices: 29% | 52% | 15% | 1%

0%　20%　40%　60%　80%　100%

Windows 11 Can Help...
If You Upgrade

Windows 11 Helps Organizations Achieve Their Security and AI Goals… Once They Upgrade
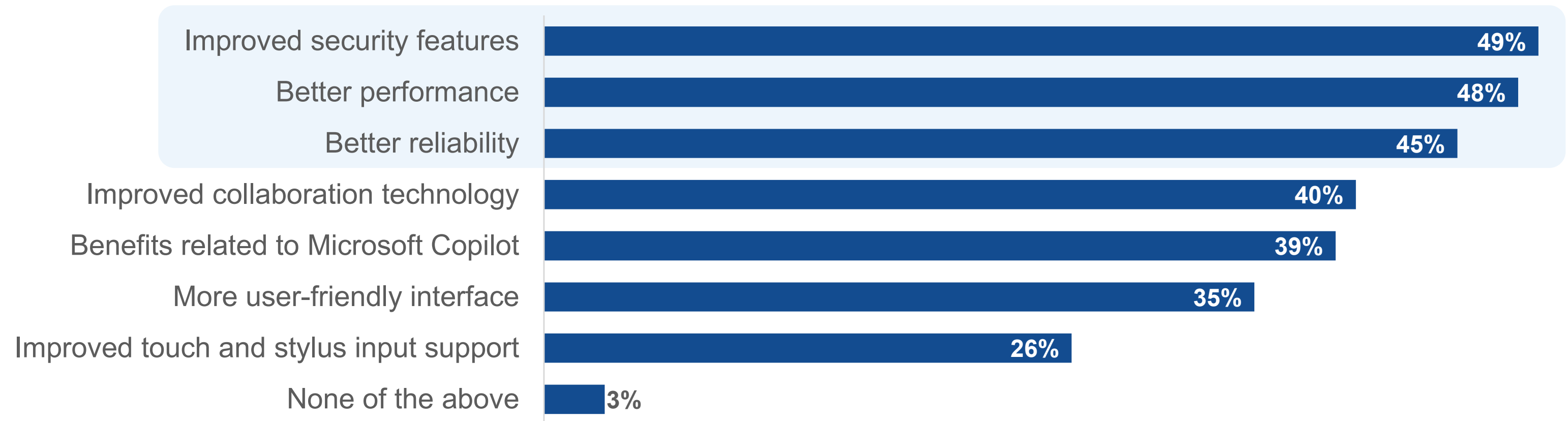
Windows 11 has been on the horizon for several years and is gaining more mindshare as we approach the end-of-life date for Windows 10 (i.e., October 14, 2025).

But this upgrade isn't just a run-of-the-mill OS upgrade. Respondents noted that upgrading to Windows 11 gave them improved security features (49%), better performance (48%), and better reliability (45%).

With that in mind, it's concerning that just 60% of Windows devices have been upgraded to Windows 11, on average.

Of course, in some situations, that also means upgrading the hardware itself, which presents another opportunity to address performance and security needs while embracing modern CPU architectures. Devices with Intel® Core™ Ultra, coupled with Intel vPro®, provide out-of-the-box, below-the-OS protection from attacks. In addition, Intel® Threat Detection Technology (TDT) works in concert with Microsoft Defender in Windows 11 to identify and neutralize attacks such as ransomware without bogging down on performance.

Benefits of Windows 11 Devices vs. Windows 10 Devices

Benefit	Percentage
Improved security features	49%
Better performance	48%
Better reliability	45%
Improved collaboration technology	40%
Benefits related to Microsoft Copilot	39%
More user-friendly interface	35%
Improved touch and stylus input support	26%
None of the above	3%

Percentage of Windows 10 or Older Devices That Have Been Upgraded to Windows 11

Range	Percentage
100%	9%
99% to 91%	7%
90% to 75%	18%
74% to 50%	33%
49% to 25%	18%
24% to 11%	8%
1% to 10%	5%
0%	1%
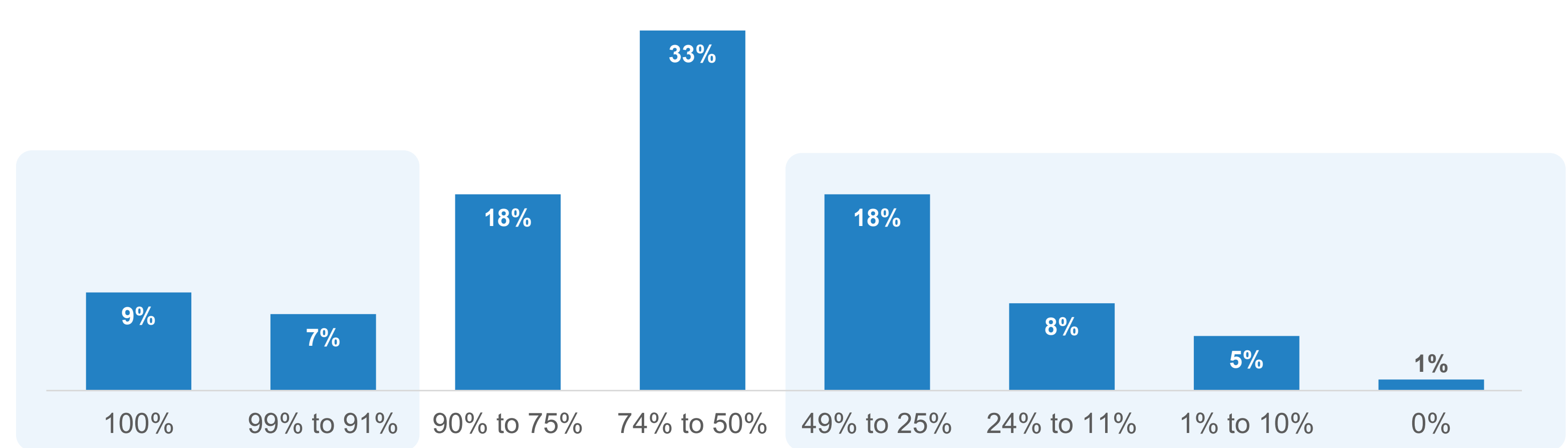
All Roads Lead To Endpoint Investments

Despite few companies completing their Windows 11 migration, it appears that most do see the value of making investments in it and related areas.
What's interesting, though, is that even though investing in AI-enabled desktops and laptops is in a respectable fifth place on the list of the most significant EUC investments organizations plan to make, the impact those devices will have on all the items above them in the list could be truly transformational.

For example:

New devices with local AI capabilities increase performance by offloading certain tasks from the CPU to the more optimized neural processing unit (NPU). This can enhance many things, like security, communications, and integration with other business AI initiatives.

Windows 11 includes Copilot, which, when used with the Intel® Core™ Ultra processor that contains a CPU, GPU and NPU, provides benefits such as improved audio/video, image generation, translation, content creation, search, and more.
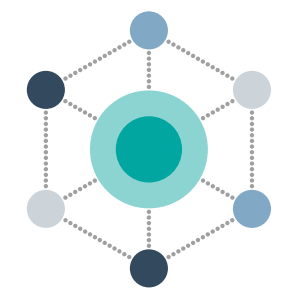
Productivity suites can leverage local AI to enhance collaboration and content creation, among other things.
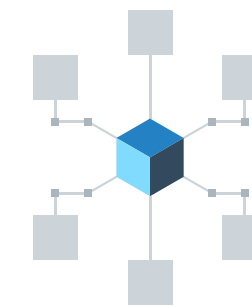
As the importance of the endpoint device increases due to an influx of apps that leverage AI, so does the need for Windows application management.

The reality is that AI-enabled devices are poised to become foundational pieces of a more secure, more efficient, more productive business, and the results are hard to ignore.
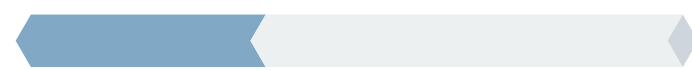
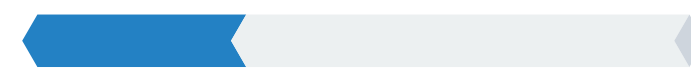**Top Five EUC Technology Investments Planned in the Next Year**
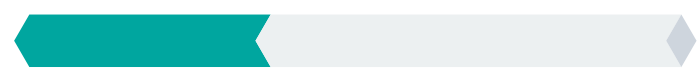
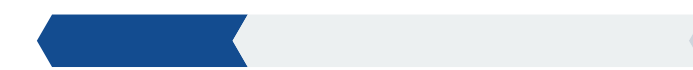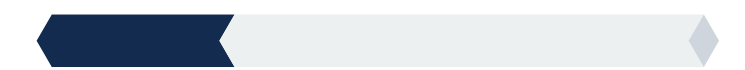| 37%	36%	32%	30%	28%
New laptop devices	Productivity suites	Windows 11 deployment/ migration/upgrades	Windows application management	AI-enabled desktop/laptops

Customers Underestimate the Benefits of End-user AI Usage Relative to the Actual Impact It's Having
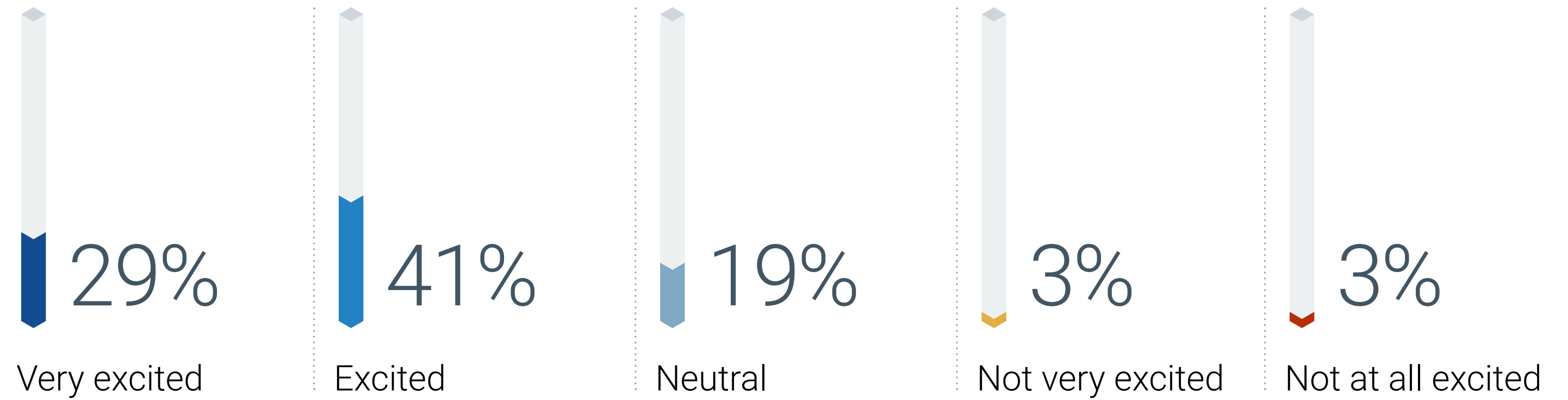
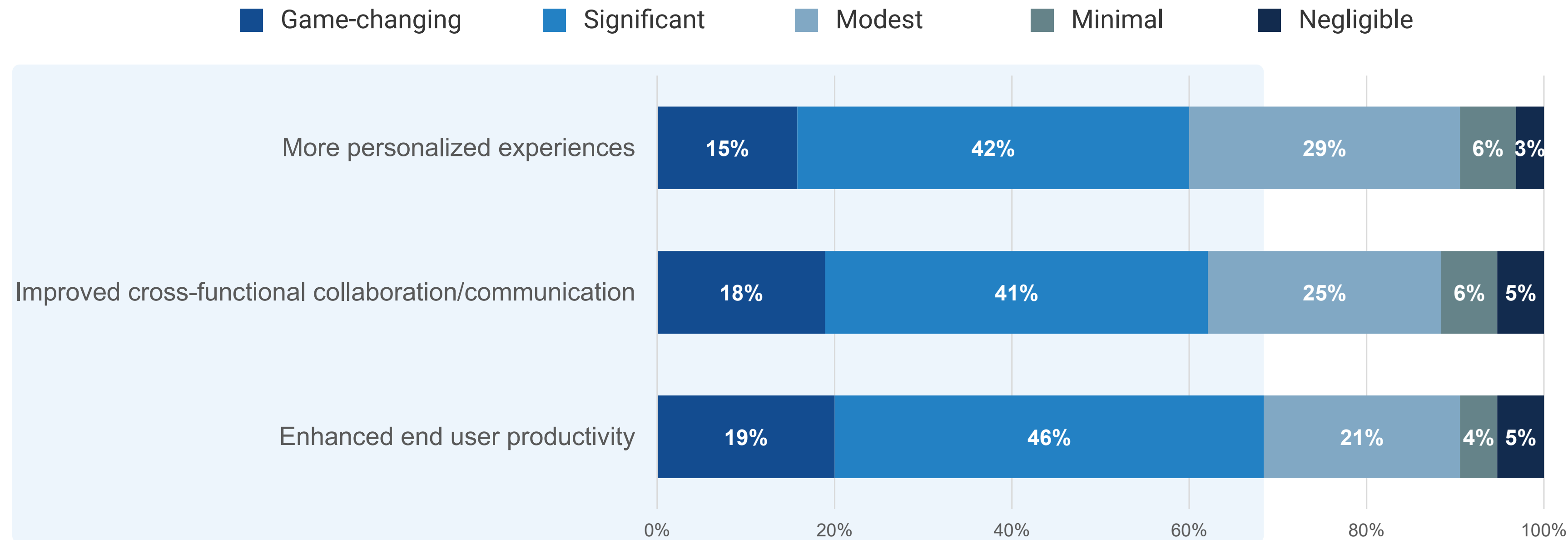# Expectations for AI (and Specifically Microsoft Copilot) Are Soaring!

When respondents who had not yet observed any increased efficiency were asked about their level of "excitement" about what Microsoft Copilot could mean for their business, 70% noted that they were excited or very excited.

In the focus areas of end-user productivity, cross-functional collaboration/communication, and more personalized experiences, over 40% said Copilot was positioned to have a "significant" impact on each of these areas, while many others simply called them "game-changing."

Level of Excitement for Microsoft Copilot

29%	41%	19%	3%	3%
Very excited	Excited	Neutral	Not very excited	Not at all excited

Expected Impact of Microsoft Copilot

Legend: ■ Game-changing ■ Significant ■ Modest ■ Minimal ■ Negligible

	Game-changing	Significant	Modest	Minimal	Negligible
More personalized experiences	15%	42%	29%	6%	3%
Improved cross-functional collaboration/communication	18%	41%	25%	6%	5%
Enhanced end user productivity	19%	46%	21%	4%	5%

0% 20% 40% 60% 80% 100%

"Over 40% said Copilot was positioned to have a 'significant' impact on each of these areas, while many others simply called them **'game-changing.'"**

'Game-changing' Might Actually Be An Understatement

The result that's most interesting, however, comes from a comparison between users who have deployed Copilot and those who haven't.
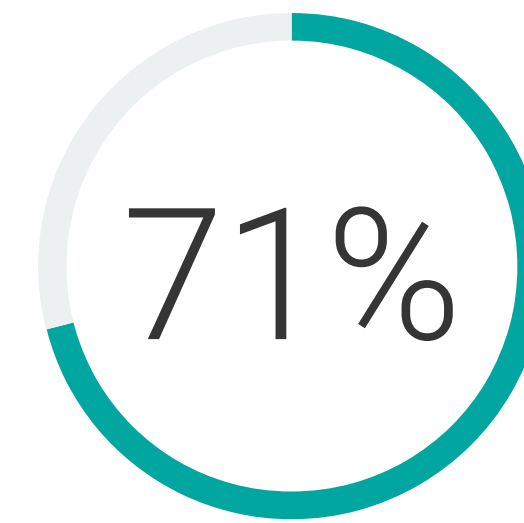
In all cases, the actual impact for those organizations that have deployed Copilot outperform the already-high expectations:
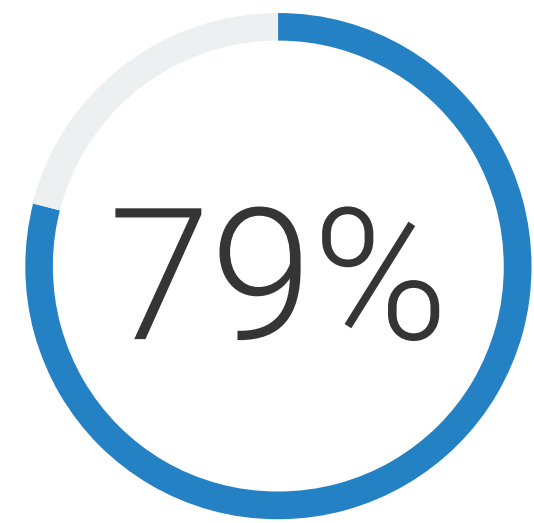
79% of SMB customers who had deployed Copilot reported enhanced end-user productivity—a 14% improvement over expectations.
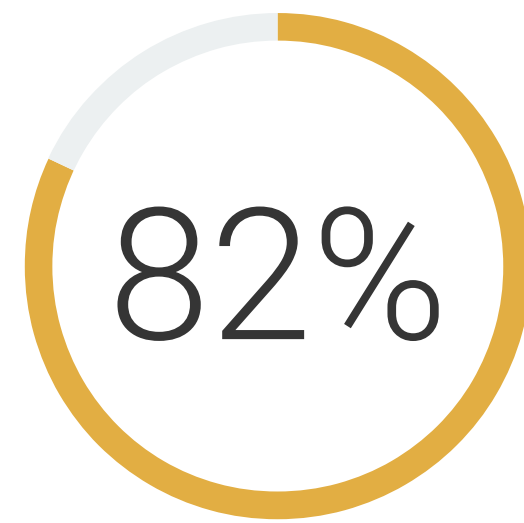
82% reported better cross-functional communication and collaboration—a 23% improvement.

71% reported a more personalized experience—a 14% improvement.

Expected vs. Actual Impact of Microsoft Copilot

■ Percentage saying the expected impact is game changing or significant   ■ Percentage saying actual impact is game changing or significant

Enhanced end user productivity

65%
79%

Improved cross-functional collaboration/communication

59%
82%

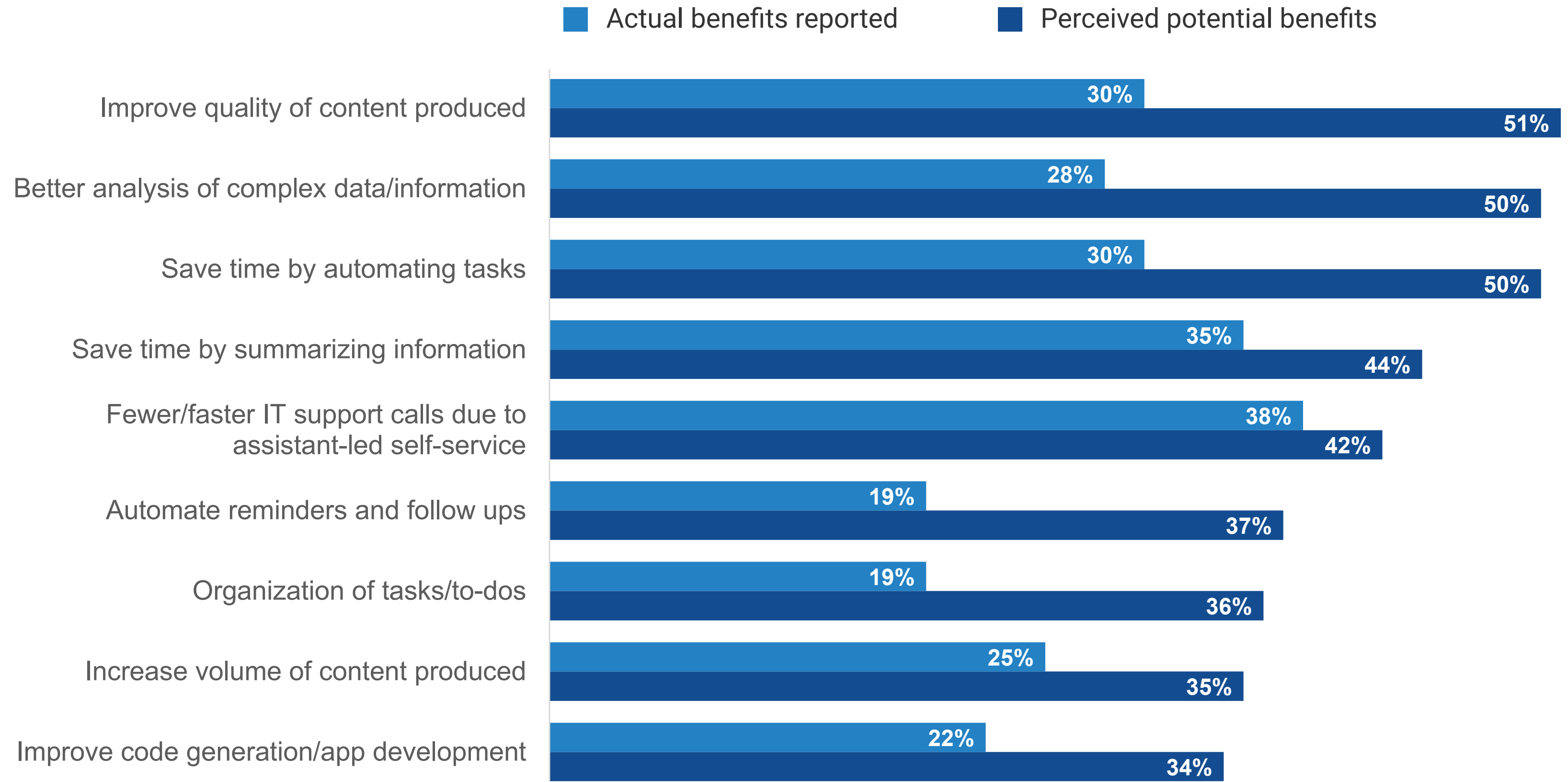**More personalized experiences**

57%
71%

Copilot Users Reported That Benefits Exceed Expectations

Looking a level deeper is perhaps even more convincing, and the research uncovered that content quality and volume, complex data analysis, task automation, and code generation all dramatically outperformed expectations (which were already quite high to begin with).

Even those facets that were closer to expectations made significant improvements for organizations, like fewer IT support calls and faster resolution due to assistant-led self-service.

It's rare to see something live up to—and exceed—expectations at this level, and it's reassuring that investments made in AI at the endpoint now will pay off both today and into the future. It's clear that organizations that aren't prioritizing end-user-facing generative AI should include it as part of their strategy.

How Microsoft Copilot Can Increase User Efficiency and Productivity

■ Actual benefits reported   ■ Perceived potential benefits

Category	Actual benefits reported	Perceived potential benefits
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%

Conclusion

Again and again, SMBs have indicated that they share the same challenges and priorities as enterprises, and this continues to hold true for end-user devices and the teams that support them. To help overcome these challenges, and to lay a foundation for the future of IT and business in general, organizations should consider the important role that modern endpoint hardware plays in achieving their IT and organizational goals.

The three main trends affecting the endpoint today—Windows 10 end of life, Microsoft Copilot, and the introduction of hardware with built-in security and AI processing capabilities in Intel—create a rare opportunity to revolutionize the endpoint management, endpoint security, and end-user experience, while helping accelerate the rate at which the business can achieve its overall goals with respect to AI.

This research evaluated the reported impact that Windows 11 and Microsoft Copilot have had on end-user productivity, communication and collaboration, and security, but there are many other products, services, and outcomes that can be achieved by deploying modern hardware with built-in security and AI capabilities, like Dell AI PCs with Microsoft Windows 11, powered by the new Intel Core Ultra AI processors. The sooner you begin your journey, the sooner you can take advantage of them.

As a leader in devices, support, and services, Dell is well-positioned to help with the needs of companies of all sizes, regardless of where they are on their security, AI, or Windows 11 journeys. Any organization that's dealing with the same challenges and hoping for similar outcomes would be wise to reach out to Dell as a trusted partner.

How Dell Technologies, Intel and Microsoft can help

By choosing Dell Technologies to accelerate AI-driven productivity across your workforce, you leverage our expertise and benefit from our close partnerships with Intel and Microsoft. This collaboration has resulted in trusted solutions co-engineered by all three industry leaders. To meet the growing demands of AI organizations need modernized hardware. Our devices are optimized for AI workloads, including the use of Microsoft Copilot powered by the new Intel® Core™ Ultra processor. Combined with Dell's services and technical expertise, we provide organizations with a comprehensive approach to transform work and innovate everywhere.

A definitive AI PC experience for business

Intel Core Ultra with Intel vPro offers our best PC experience yet, optimized for AI to enhance applications and handle demanding workloads quickly. Boost productivity and performance while ensuring long-lasting battery life and powerful protection right out of the box. AI-powered security features and remote manageability ease PC fleet management, enabling work-from-anywhere and sustainable computing practices. All packaged together to deliver performance that makes users happy.

Powerful performance, advanced AI and security at your service

Accelerate innovation, solve problems faster and drive business impact with Windows 11 Pro Copilot PCs. Devices come with a turbocharged NPU for powerful performance and unique AI experiences. Dell AI PCs, powered by Intel Core Ultra with Intel vPro and Copilot, are business-ready, Secured-core PCs that include Microsoft Pluton for extra protection. With unique AI experiences combined with the highest level of hardware and Windows security, you can find mission-critical information faster, turn ideas into action, respond more quickly to customers and safeguard your most sensitive data.

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