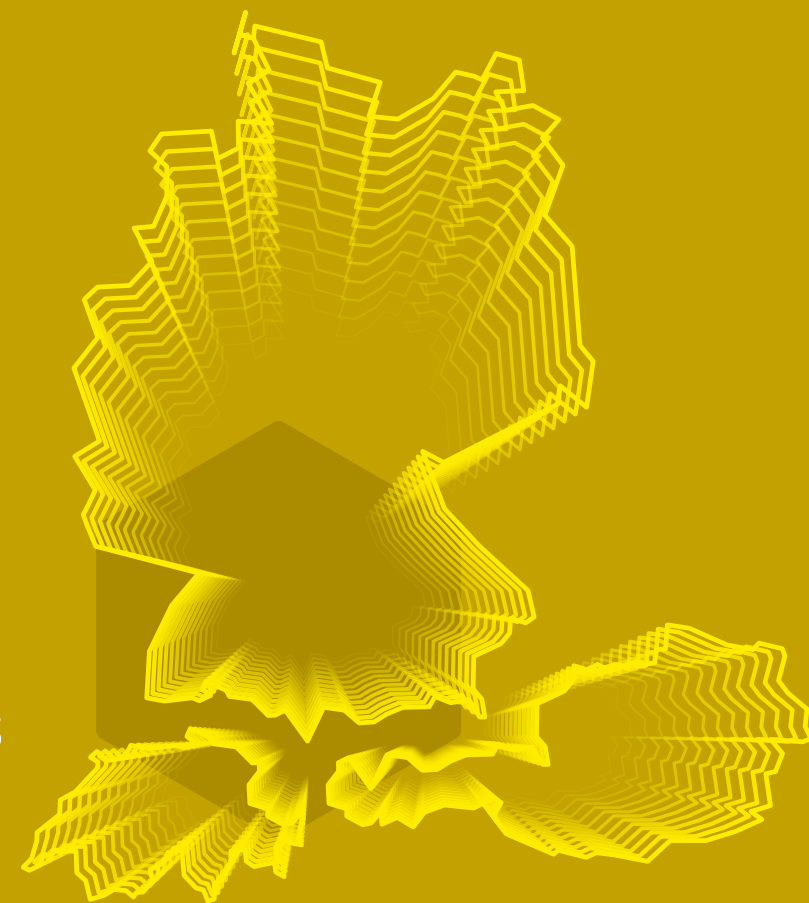


REPORT

AI | Stock-
taking | 20
21

The status of AI in Germany, Austria and Switzerland

Plans | Forecasts | Projects



Study with
2,000
respondents

Artificial intelligence is changing perspectives

Dear readers,

If you could ask just under 1,000 managers one question about AI, what would you be interested in? How far have AI projects progressed? Where do they see the biggest hurdles in their companies? What potential do they believe the technology has in the long term?

In our 2021 AI survey, we had the opportunity to ask these and other questions. Decision-makers gave us an insight into their plans, projects and forecasts. This analysis is supplemented by a survey of 1,000 consumers. Here, we were particularly interested in how open they are to using AI. What is the predominant attitude, concern or enthusiasm? I find two aspects particularly exciting: How new the technology still is for many companies. And how open customers are to using AI.

Over 70 per cent of those responsible agree with the statement that the use of AI is still in its infancy. This is an exciting phase for companies: They are investing in organisation, technologies, processes and expertise across all sectors and areas of responsibility. They are currently laying the foundations for future success. And AI will play an important role in this success. The overwhelming majority of experts are sure of this: 81 per cent are convinced that investing in AI will lead to competitive advantages in the medium term.

If we look at the situation from the perspective of the customer, we see that the majority of respondents consider AI applications such as chatbots to be useful tools. Fears – for example, of being replaced by AI in one's own job – are only shared by a minority. When those responsible consider AI technologies in communication or service processes, they can count on broad approval.

This report highlights further aspects of the current state of AI on the following pages and includes a comparison of Germany, Austria and Switzerland as well as information on the use of cloud technologies. We hope that the information will help you to set up and implement your AI initiatives.

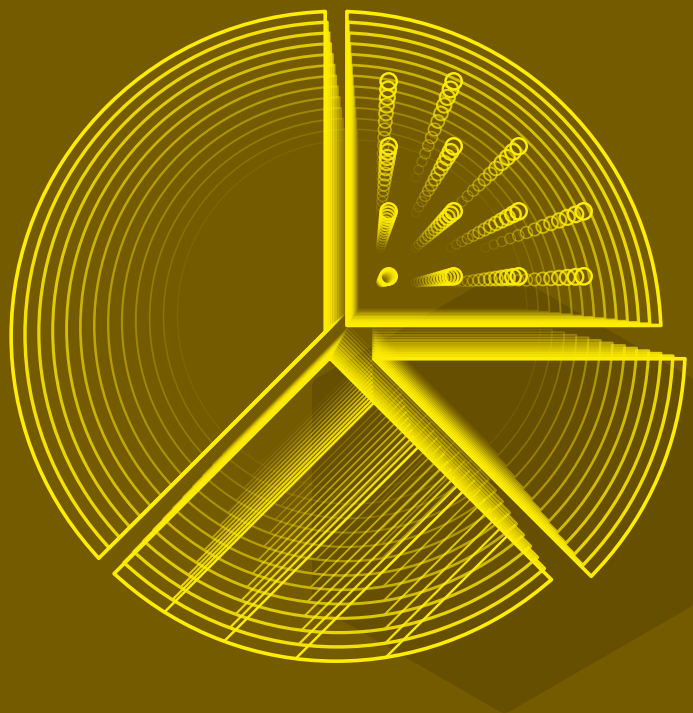
For more information visit ki.adesso.de



This report serves as a springboard for discussion – about your perspective on AI and how we can support you with our experience, our understanding of technology and our industry knowledge.

I'm looking forward to discussing this topic with you face-to-face and without any AI acting as a go-between.

Best regards,
Volker Gruhn



A LOOK AT THE COUNTRIES

The analysis at country level reveals major differences in the assessment of the positioning of AI in one's own country. In Germany, 68 per cent of decision-makers rate the AI situation as mediocre or bad. In Austria, 54 per cent still share this negative view. Managers from Switzerland assess the situation in their country much more positively (mediocre or bad: 39 per cent)

Optimism
is the dominant
mood.

MANAGEMENT SUMMARY

Optimism on the one hand, mixed mood on the other hand

The survey carried out among company managers from the D-A-CH* region as well as consumers reveals an ambivalent picture of the AI situation. On the one hand, both groups are open to AI technologies. Thus, there are fewer concerns and prejudices among private individuals than media coverage would suggest. The fear of AI-related job loss is low (15 per cent). The hope for personal advantages through the use of AI is high (64 per cent). Almost without exception, decision-makers in companies are convinced that technologies are of great importance for economic success. On the other hand, the majority of those responsible recognise that AI is still in its infancy (75 per cent). The majority of companies do not exploit the potential on a large scale.

* D-A-CH region = Germany, Austria and Switzerland

This is also evident in the analysis of possible AI use cases. The proportion of companies that have already implemented AI projects is limited across all the scenarios surveyed. Applications based on the recognition and understanding of natural language are most common here.

The survey of customers focused on the topic of chatbots. The positive basic attitude towards AI can also be seen here. The majority of people who already have experience with chatbots rate the conversations positively overall (59 per cent). The willingness to use chatbots is also high – but varies greatly depending on the specific application. As an online shopping advisor, it is seen as viable by many people. However, as an assistant for investments, it is only an option for a minority. Companies can expect a high level of acceptance among customers when using chatbots in their customer service. But it is important to choose the use case wisely – and to work on the depth of information offered. More than 79 per cent of respondents agree with the statement ‘The chatbot knows too little’.



A LOOK AT THE CLOUD

Just under 60 per cent of respondents rely on cloud technologies in their AI environment. These offerings are catching on in a big way. When looking at the advantages of using the cloud, decision-makers are unanimous: Obtaining preconfigured AI applications is the central argument for 76 per cent of the respondents. But one fear resonates with many of those responsible: the fear of becoming dependent on a cloud provider. This apprehension is shared by more than 60 per cent of the respondents.

Over
70 %

of decision-makers believe that AI is still in its infancy.

Only
52 %

of customers have already heard the term chatbot before.

Still
38 %

of decision-makers are convinced that there is a lot of resistance to AI in their own companies.

Only
25 %

of customers are afraid of the topic of AI.

Almost
60 %

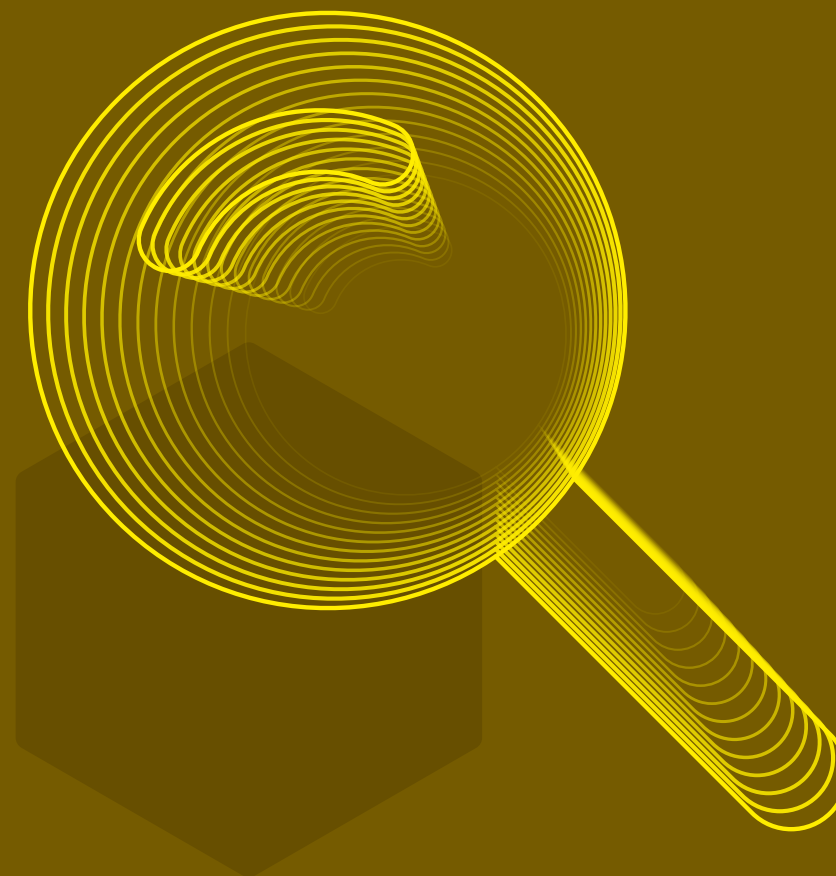
of decision-makers already rely on cloud solutions when dealing with AI applications.

Comprehensive:
956 company
managers and
1,000 end customers
participated in the
online survey

DEMOGRAPHICS

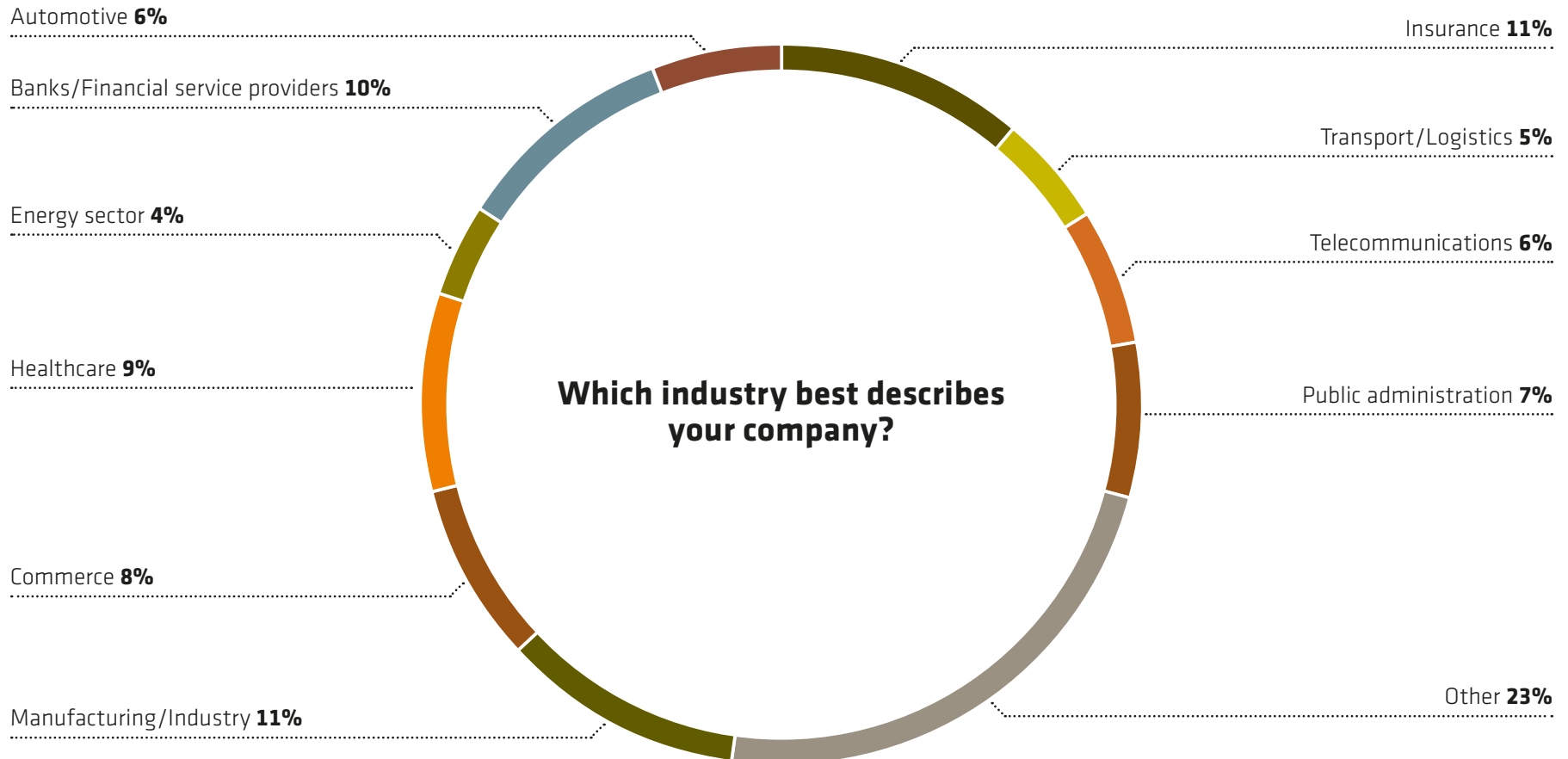
Thousands of voices – one mood

In January and February 2021, we conducted a survey among corporate decision-makers and end customers from the D-A-CH region together with the market research institute Heute und Morgen GmbH. Based on the survey of these target groups, we are able to draw a detailed picture of the current AI situation. What are the expectations and dislikes? What plans do companies have, what hopes do private individuals have? How do the respondents rate the AI positioning of their own organisation or own country?*



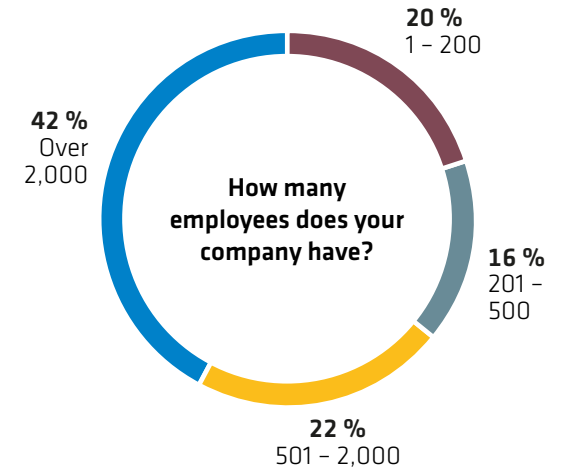
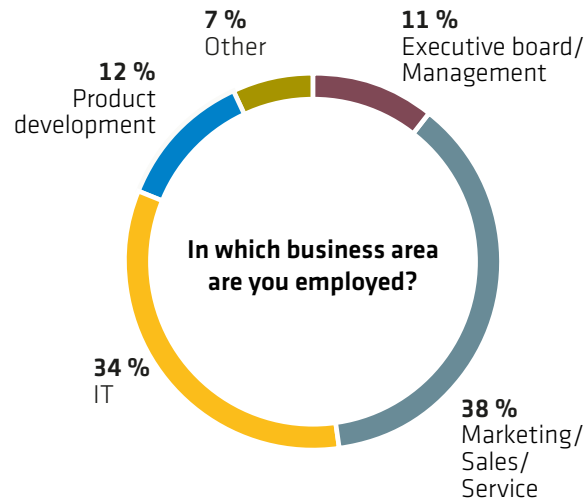
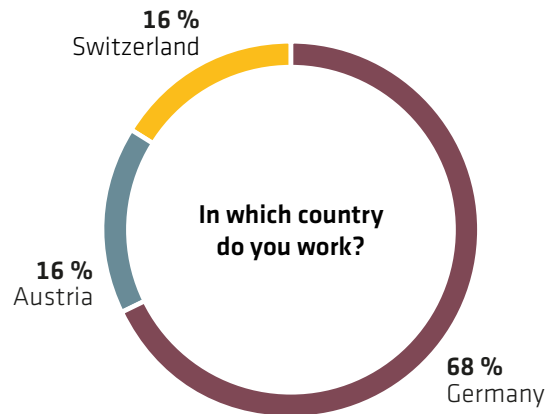
* Unless stated otherwise, the data refers to the D-A-CH region.

DECISION-MAKERS CUSTOMERS



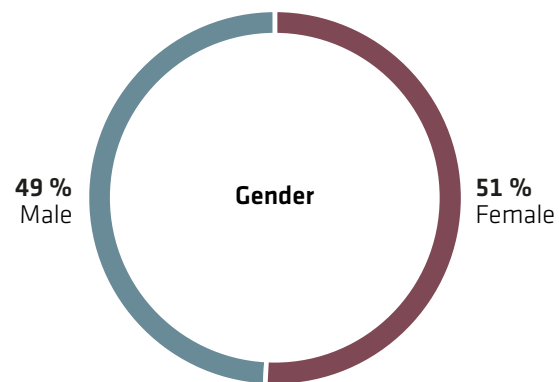
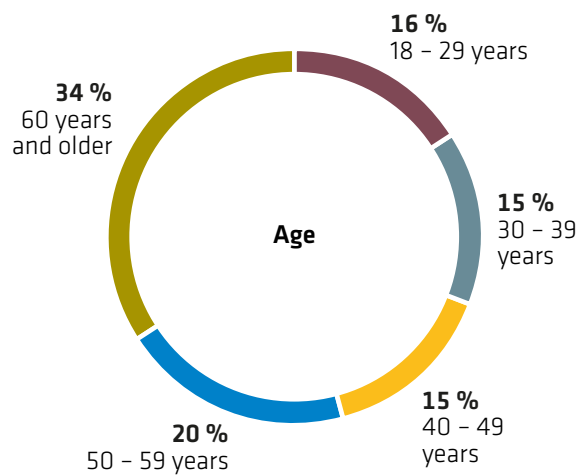
Source: adesso SE | ki.adesso.de

DECISION-MAKERS CUSTOMERS



Source: adesso SE | ki.adesso.de

DECISION-MAKERS **CUSTOMERS**



Source: adesso SE | ki.adesso.de

Surprisingly:
New digital
competitors are
only a top issue
for about one
in ten.

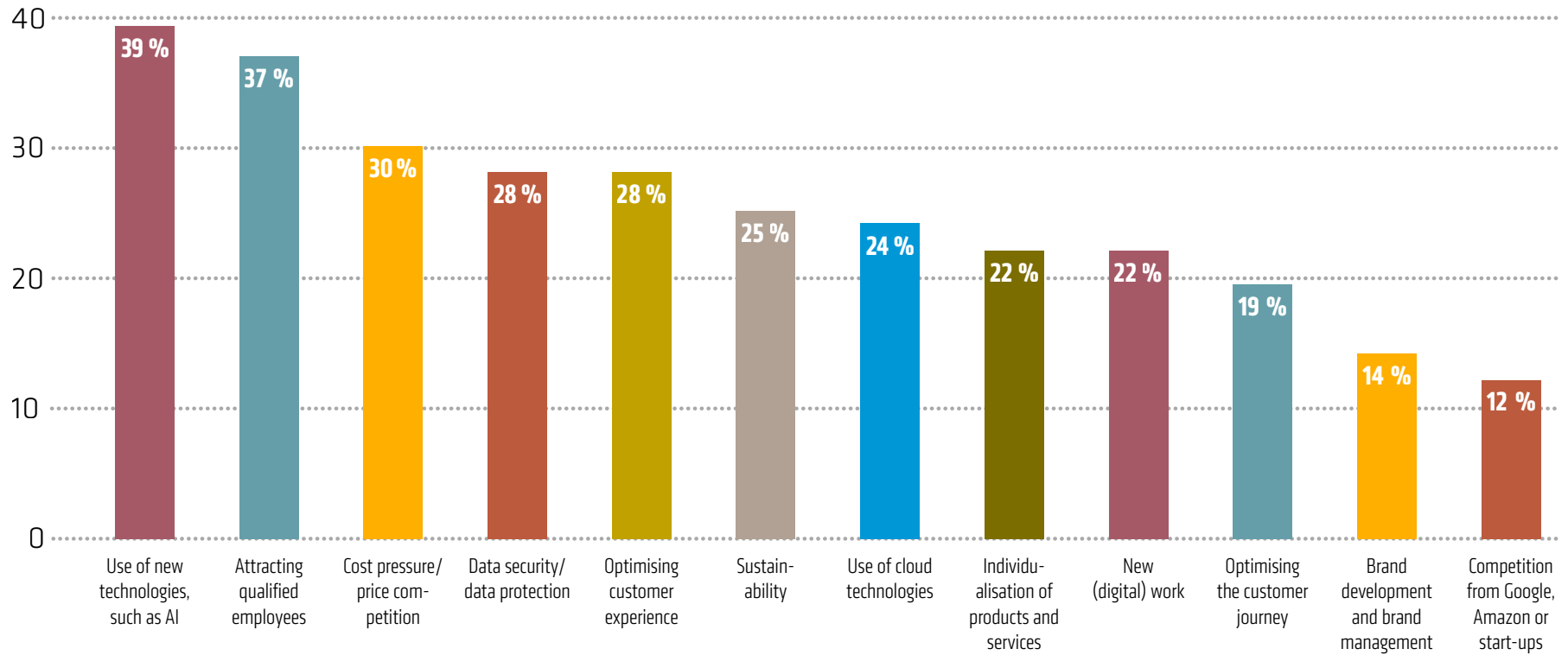
TOPICS

What's on the radar

Three years is a long time in the corporate world. Nevertheless, we asked those responsible to predict development in the next 36 months. Which aspects will prove to be the central challenges? What is at the top of the agenda? Not surprisingly, new technologies such as artificial intelligence are the top topic in companies. Closely linked to this is the issue of attracting qualified employees. In third place is the classic issue of cost pressure/price competition.

DECISION-MAKERS CUSTOMERS

What are the key challenges over the next three years?



Source: adesso SE | ki.adesso.de

ASSESSMENT

More light than shadow, hopes rather than fears

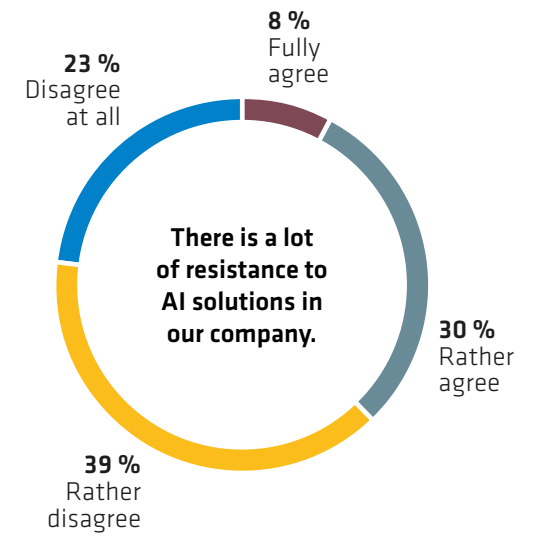
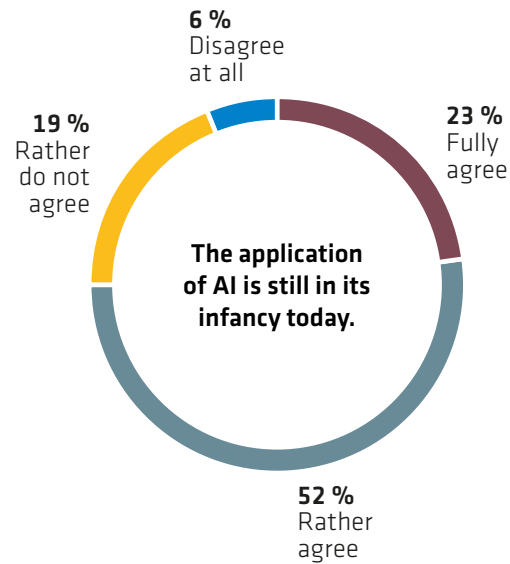
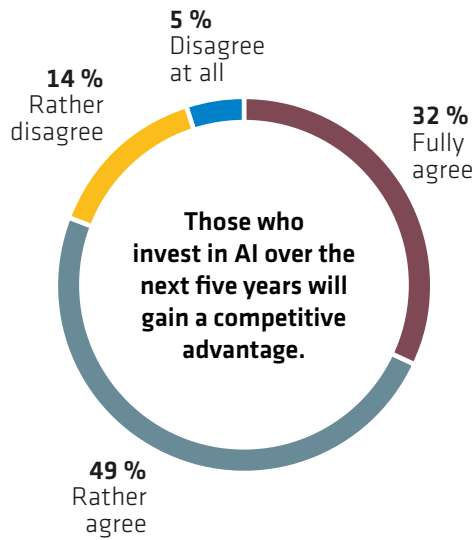
The optimism that end customers have about the topic of AI can be summed up in two figures. The percentage of respondents who are not afraid of AI replacing them in their job is 88 per cent. And the percentage of those who expect to benefit personally from AI is 64 per cent. Acceptance among the population is high.

The importance that company managers attach to the technology is similarly high. Over 80 per cent are convinced that an investment in AI will provide competitive advantages in the medium term. At the same time, there is still a lot of room for improvement in companies: Three-quarters of respondents believe that AI is still in its infancy.

Fearless:
75 per cent
are not afraid
of AI.

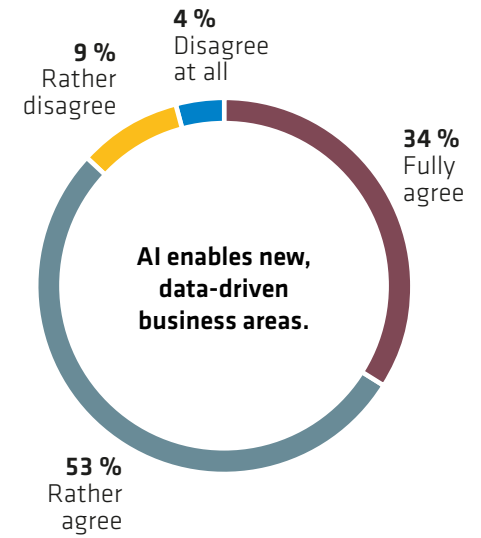
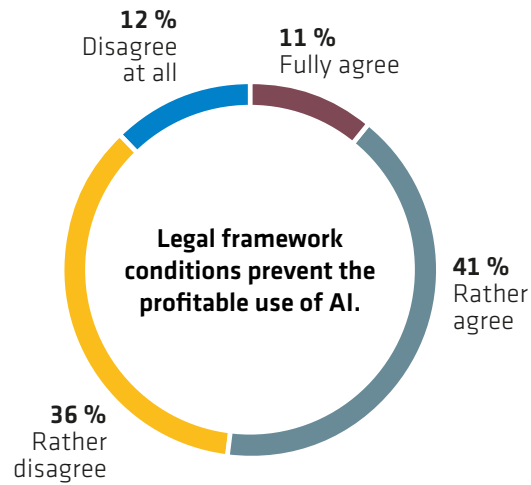
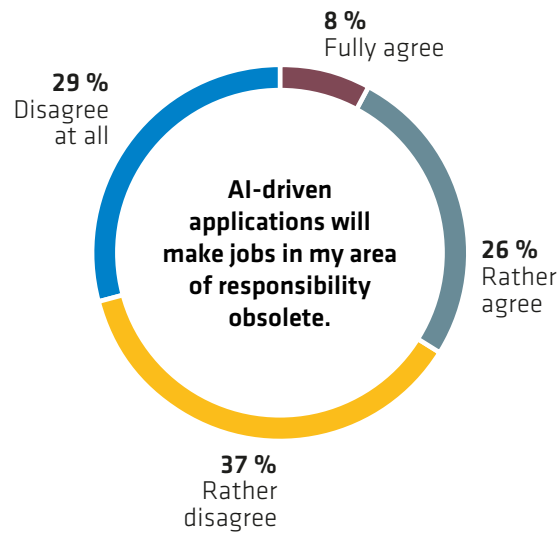


DECISION-MAKERS CUSTOMERS



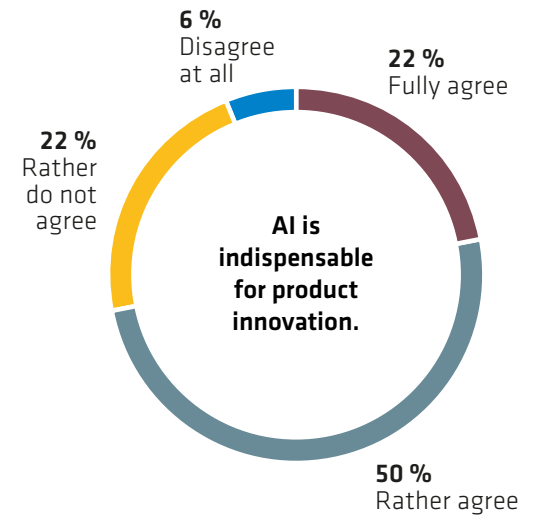
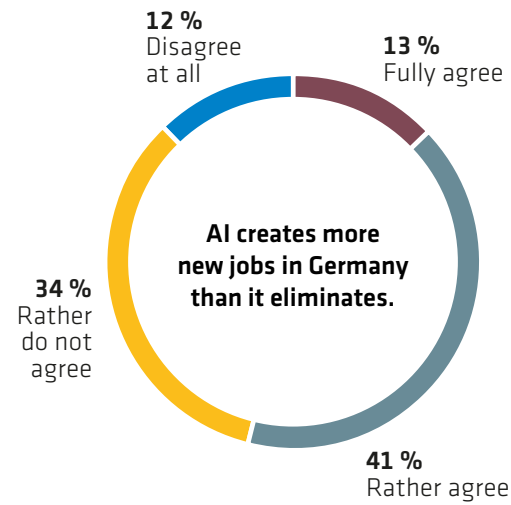
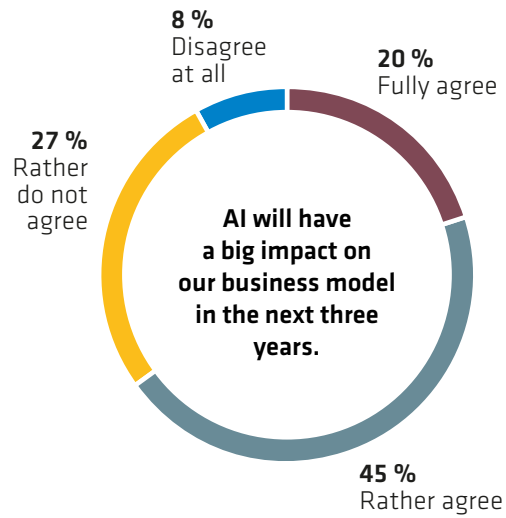
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DECISION-MAKERS CUSTOMERS



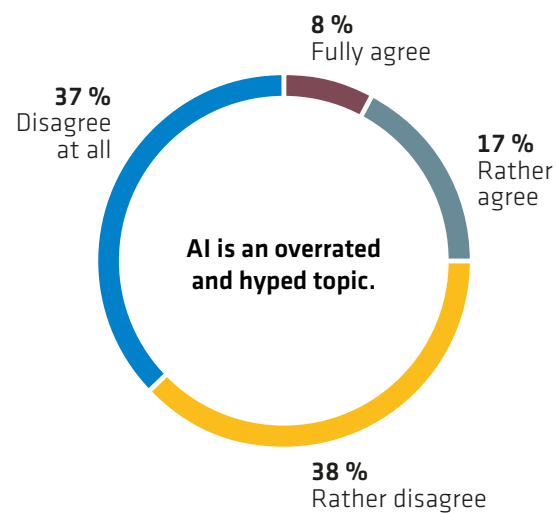
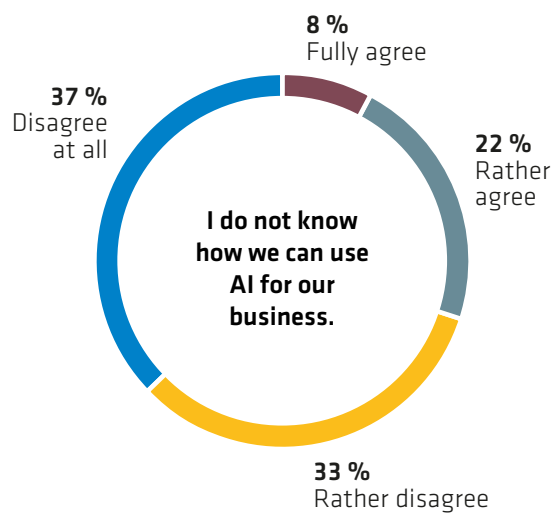
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DECISION-MAKERS CUSTOMERS



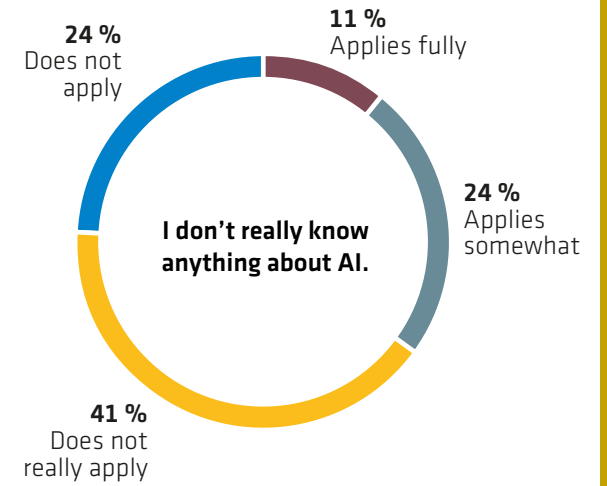
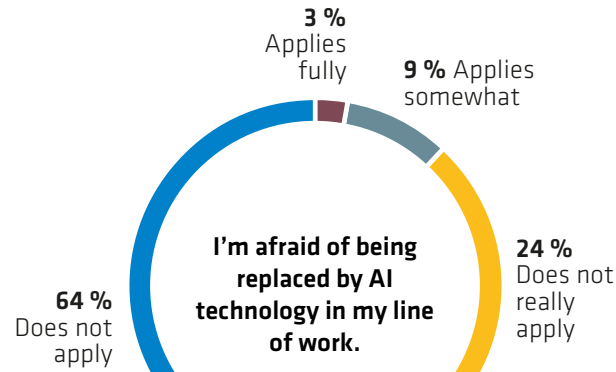
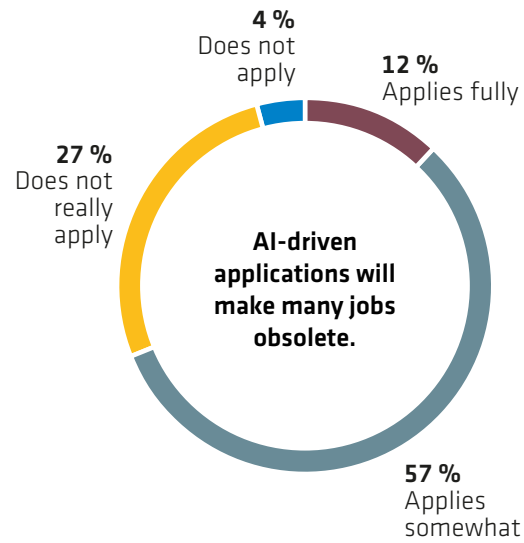
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DECISION-MAKERS CUSTOMERS



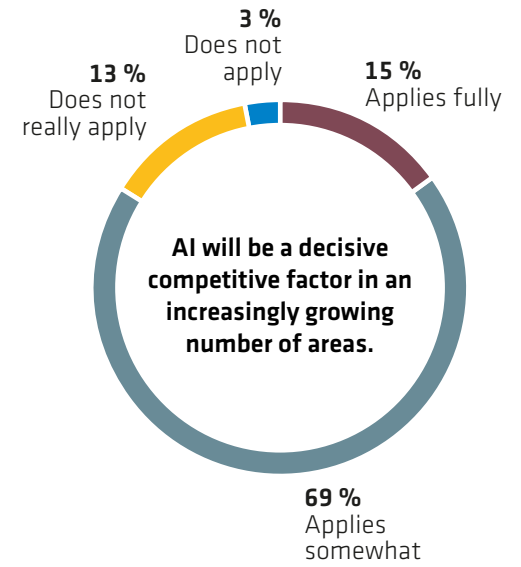
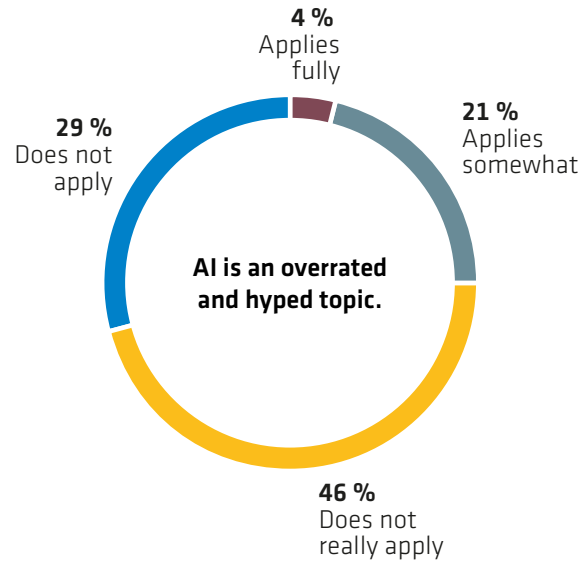
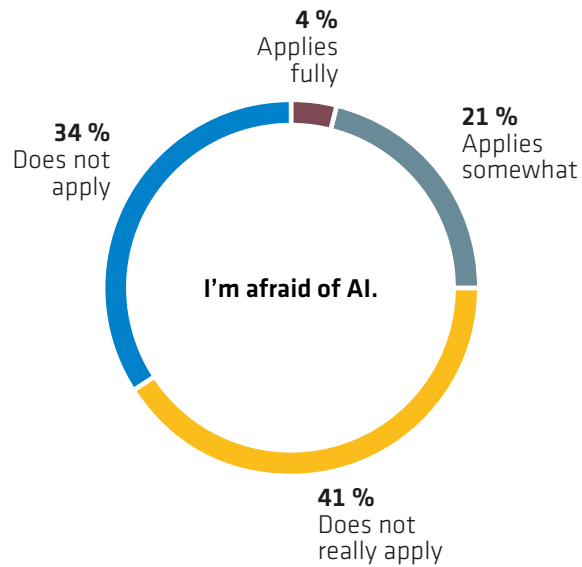
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DECISION-MAKERS CUSTOMERS



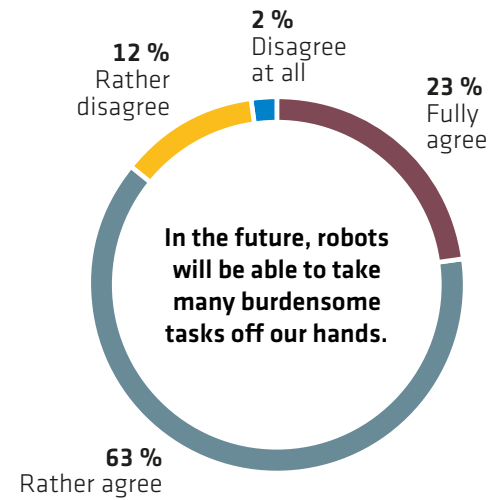
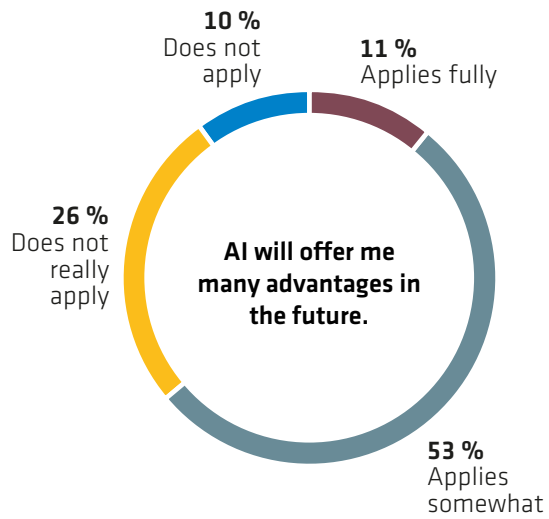
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DECISION-MAKERS CUSTOMERS

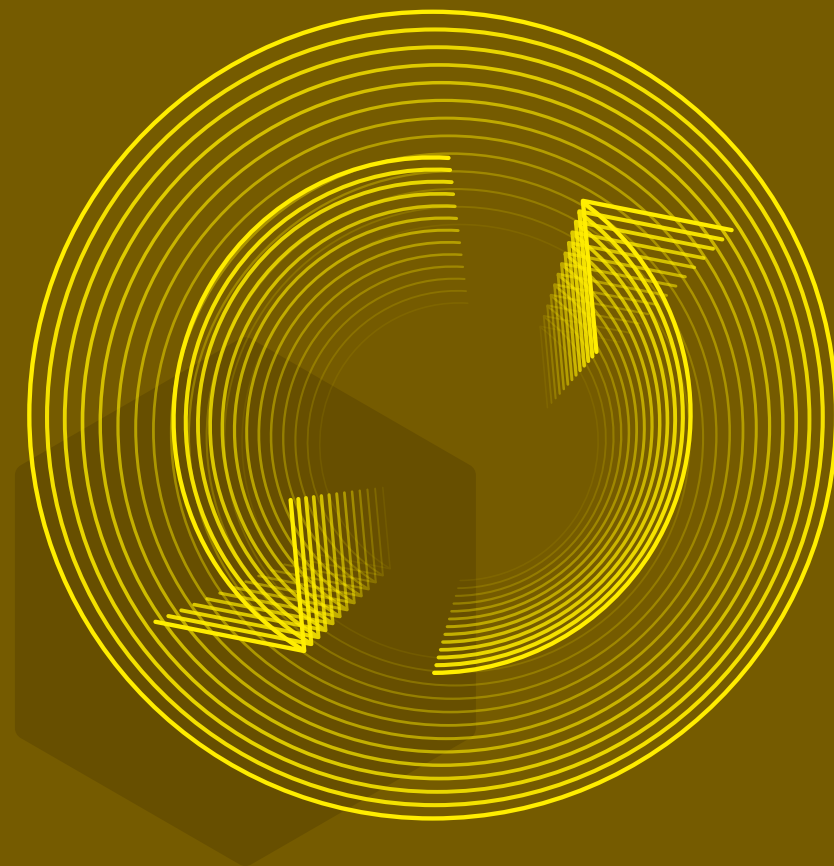


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DECISION-MAKERS CUSTOMERS



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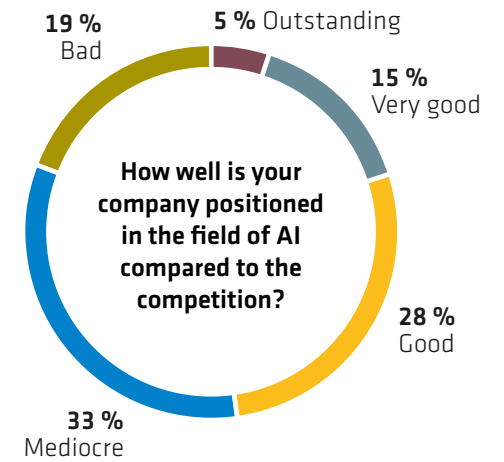
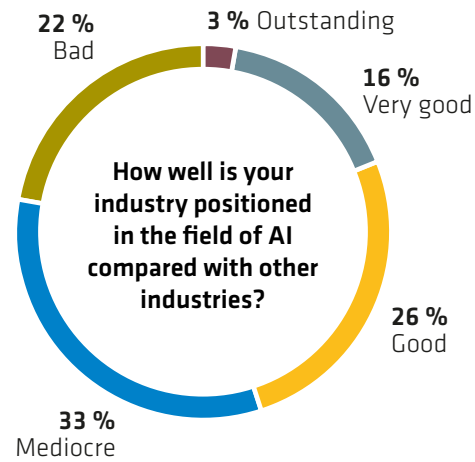
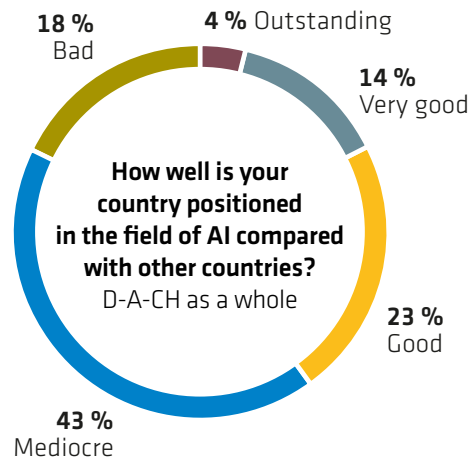
POSITIONING

More mediocre than best in class

Company managers are not really convinced by the positioning of their own country, industry and company. For example, one in five considers their own organisation to be ill-prepared for AI. The country analysis is striking: 68 per cent of the corporate managers from Germany consider their country to be in a mediocre or even bad position. In Austria, on the other hand, 'only' 54 per cent share this poor assessment. In Switzerland, it is only 39 per cent. A look at the sectors reveals major differences. For example, 60 per cent of respondents from the finance sector rate the AI positioning as good or better compared to the competition. In the insurance sector, it is only 47 per cent.

Mixed: just under 60 per cent of marketing managers rate their own company as mediocre or worse.

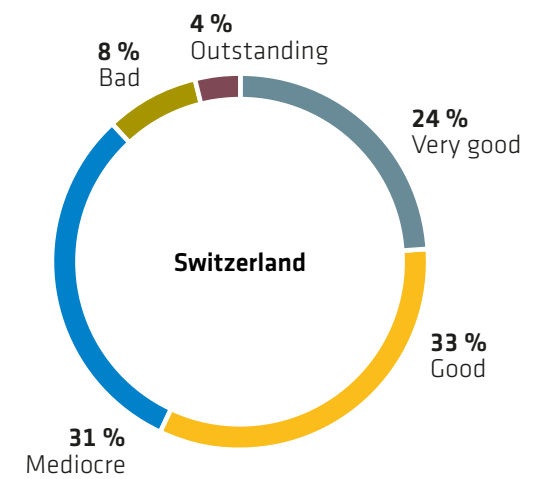
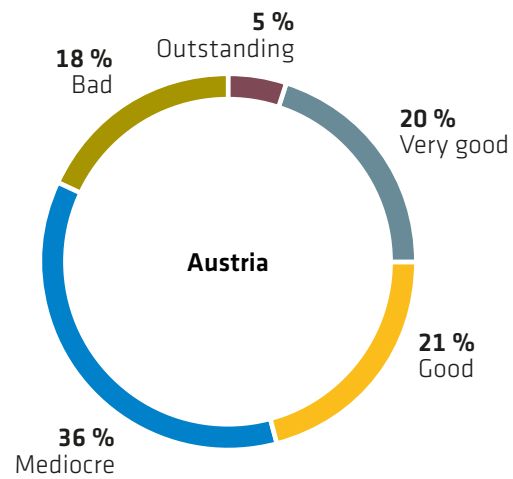
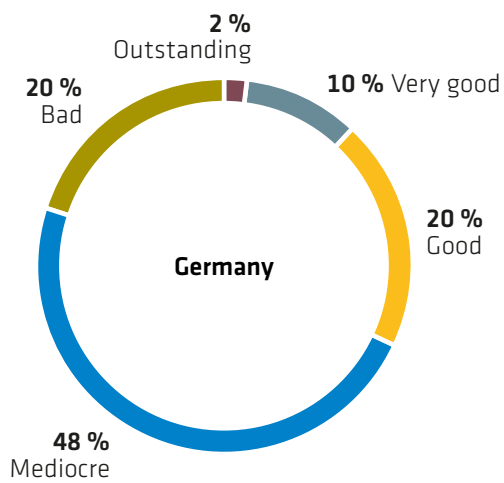
DECISION-MAKERS CUSTOMERS



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DECISION-MAKERS CUSTOMERS

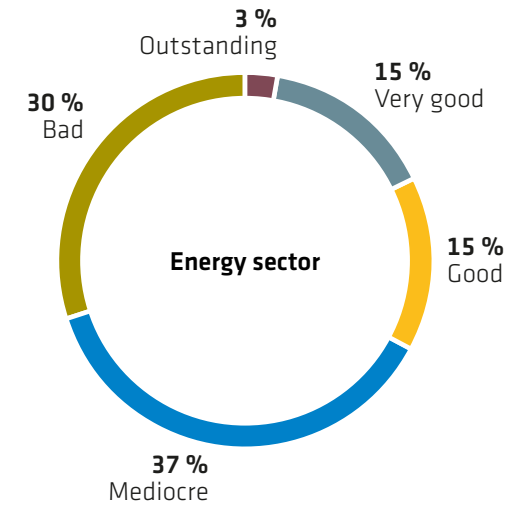
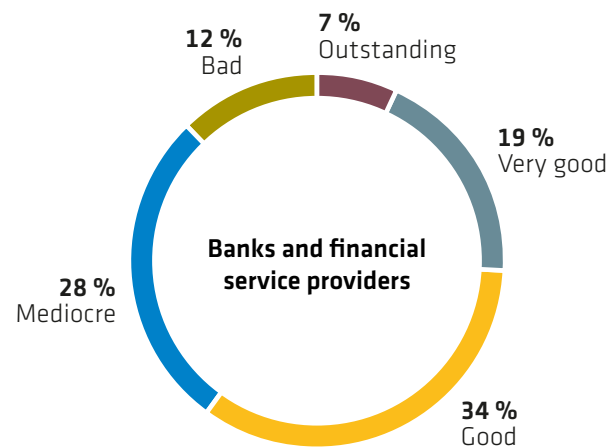
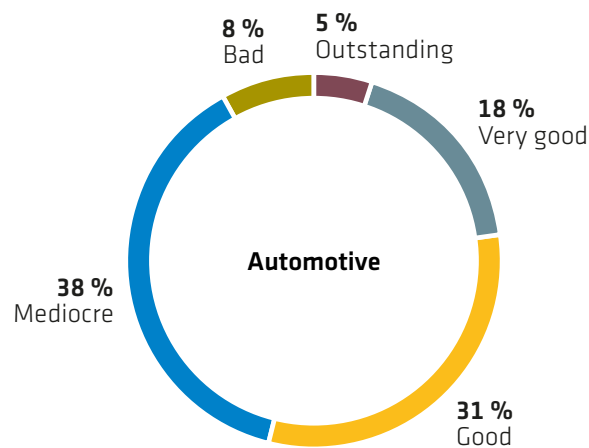
In your opinion, how well is your country positioned in the field of AI compared with other countries?



Source: adesso SE | ki.adesso.de

DECISION-MAKERS CUSTOMERS

In your opinion, how well is your company positioned in the field of AI compared to the competition?*
(industry comparison)

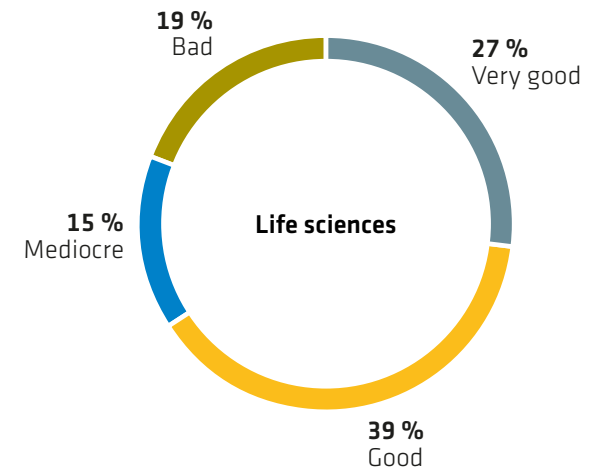
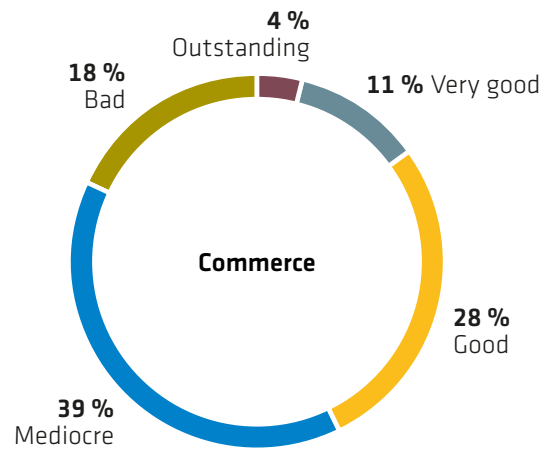
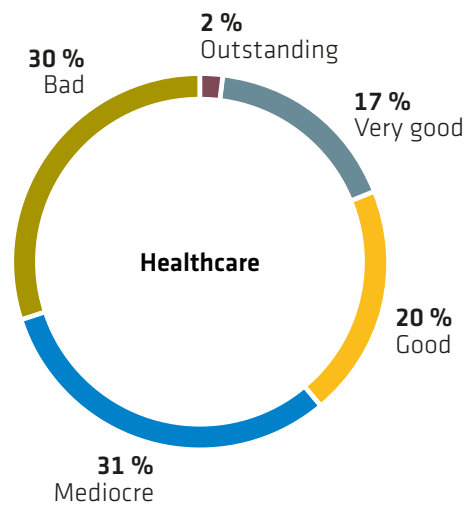


Source: adesso SE | ki.adesso.de

*Detailed evaluations on selected industries can be found at ki.adesso.de.

DECISION-MAKERS CUSTOMERS

In your opinion, how well is your company positioned in the field of AI compared to the competition?*
(industry comparison)

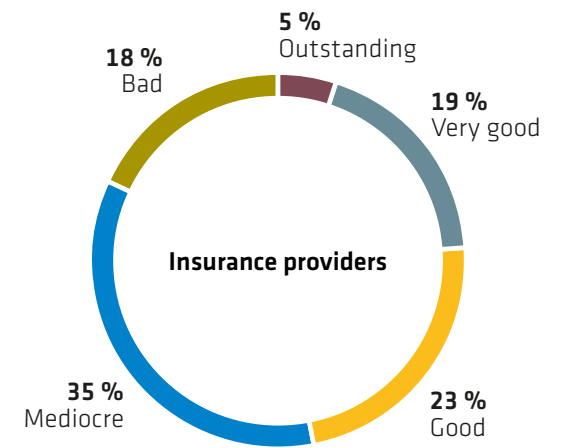
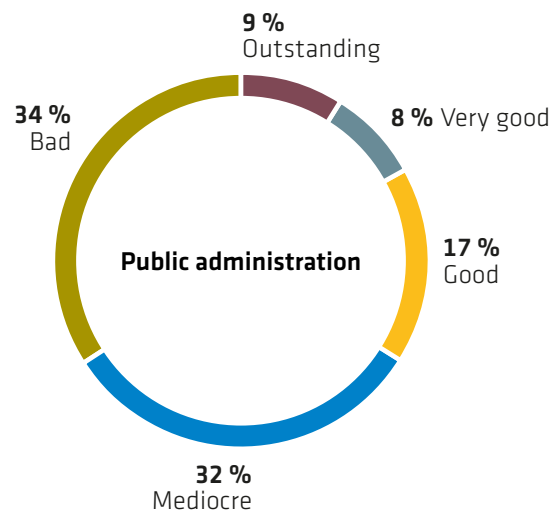
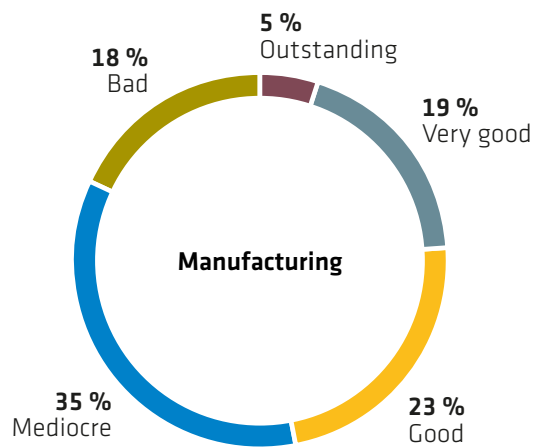


Source: adesso SE | ki.adesso.de

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DECISION-MAKERS CUSTOMERS

In your opinion, how well is your company positioned in the field of AI compared to the competition?*
(industry comparison)

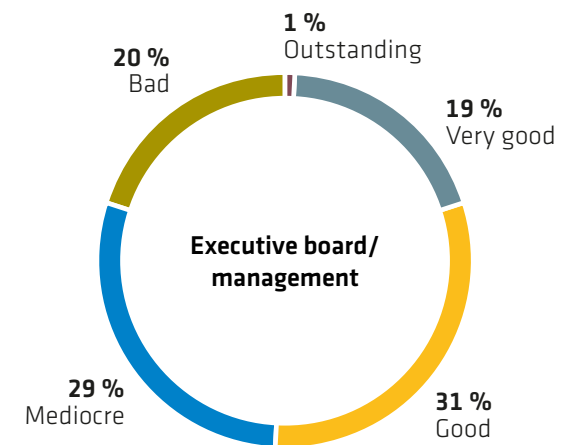
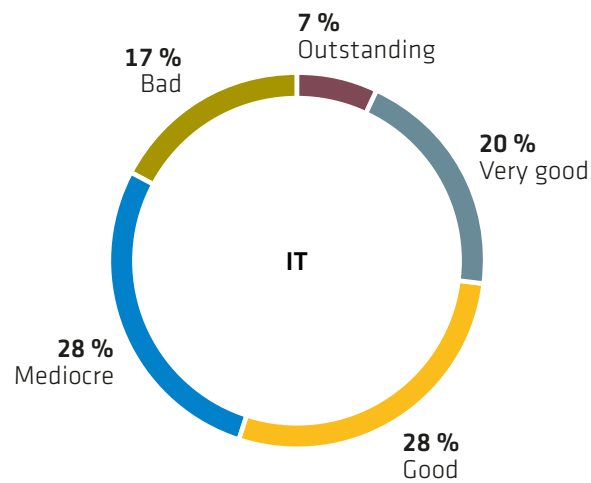
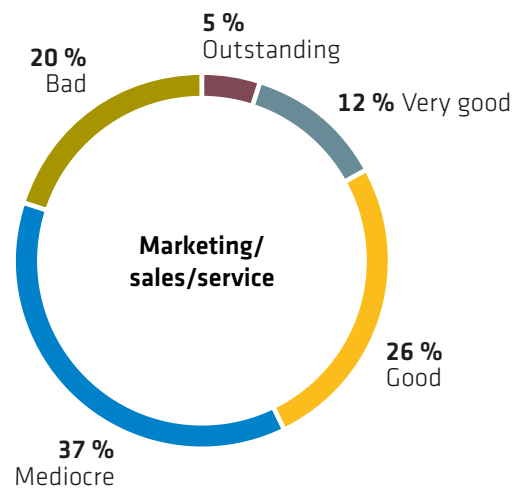


Source: adesso SE | ki.adesso.de

*Detailed evaluations on selected industries can be found at ki.adesso.de.

DECISION-MAKERS CUSTOMERS

In your opinion, how well is your company positioned in the field of AI compared to the competition?*
(departmental comparison)



Source: adesso SE | ki.adesso.de

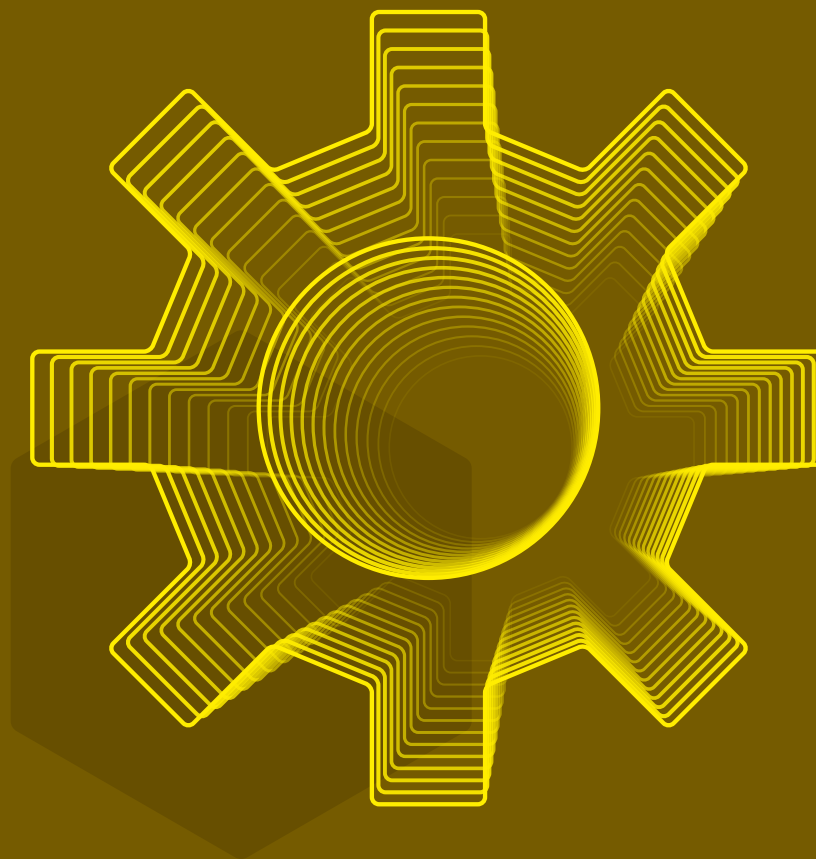
*Detailed evaluations on selected departments can be found at ki.adesso.de.

Pleasing:
Almost 30 per cent
already rely on
further training
measures.

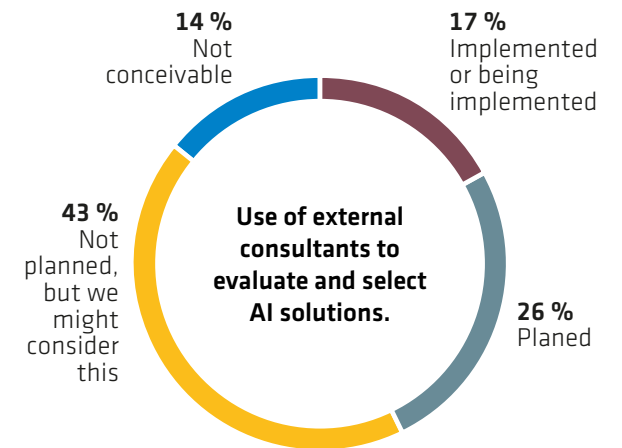
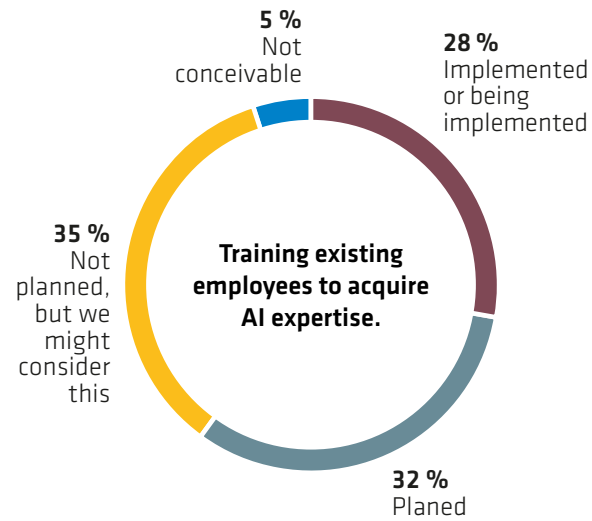
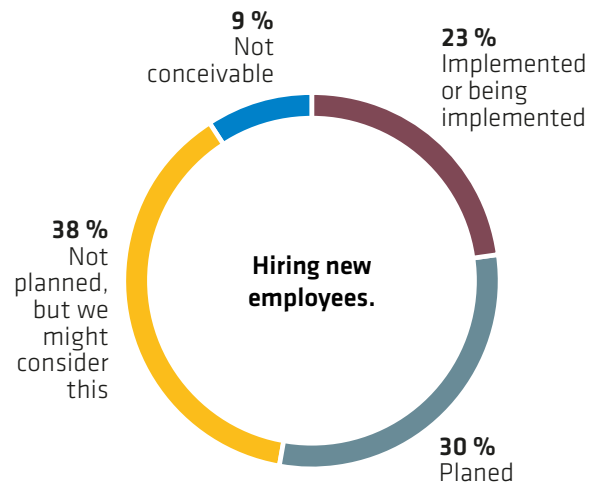
MEASURES

Opportunities as far as the eye can see

From new employees to external consultants, from individual pricing to image recognition: There are numerous ways to approach the topic of AI or use cases that can be implemented. As part of the survey, those responsible assessed the degree of implementation in their own company. One scenario on which 22 per cent already rely is the recognition and understanding of natural language. The use of AI components in CRM systems is similarly widespread.

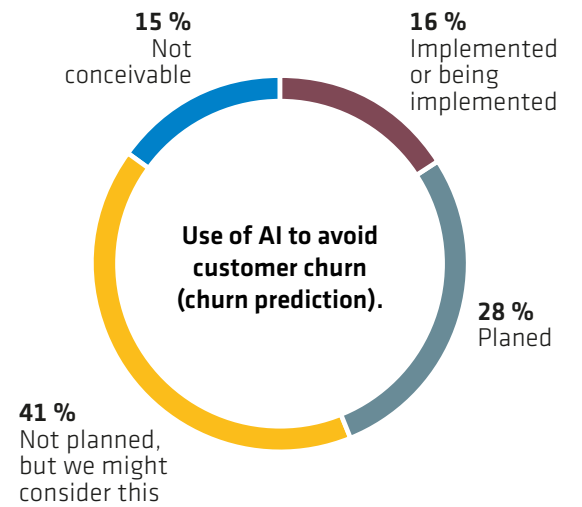
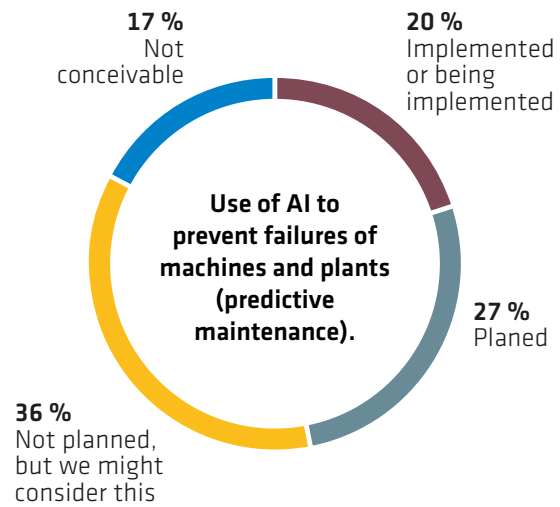
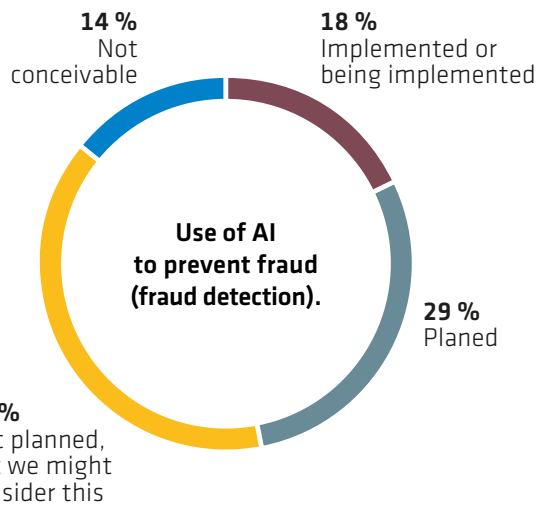


DECISION-MAKERS CUSTOMERS



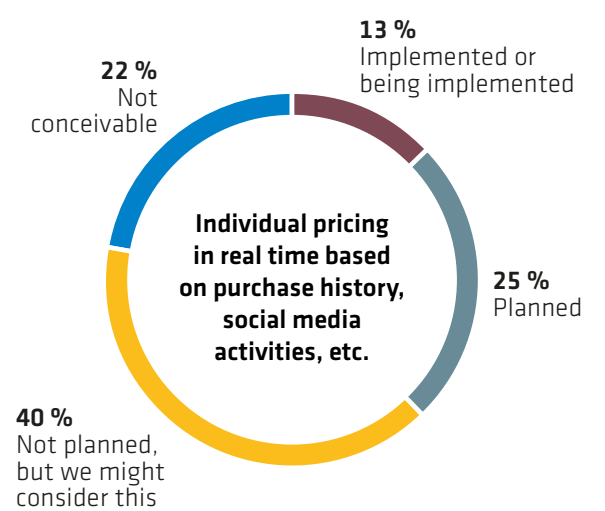
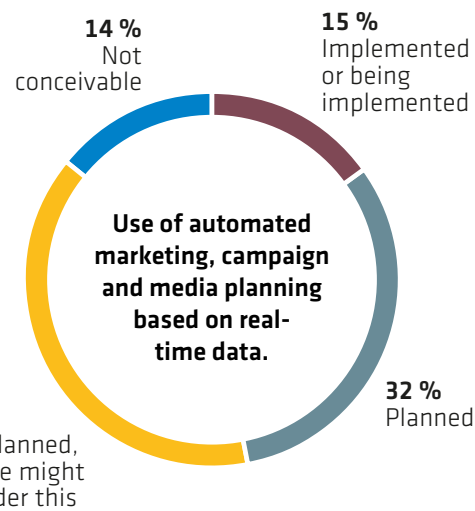
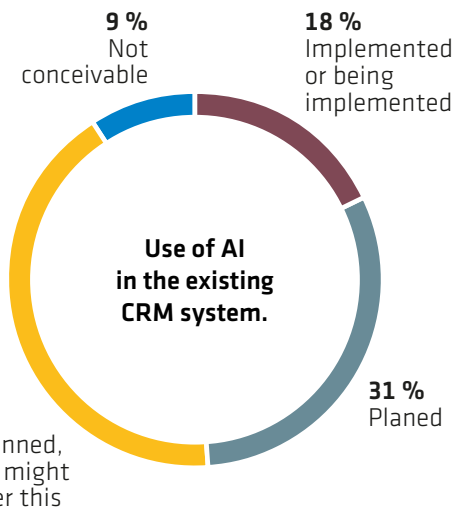
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DECISION-MAKERS CUSTOMERS



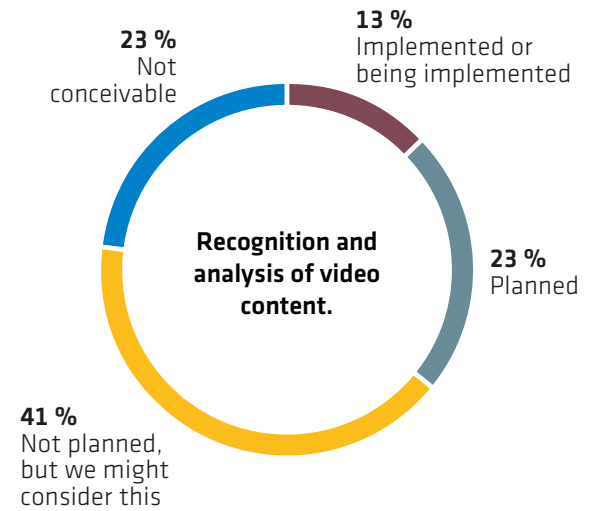
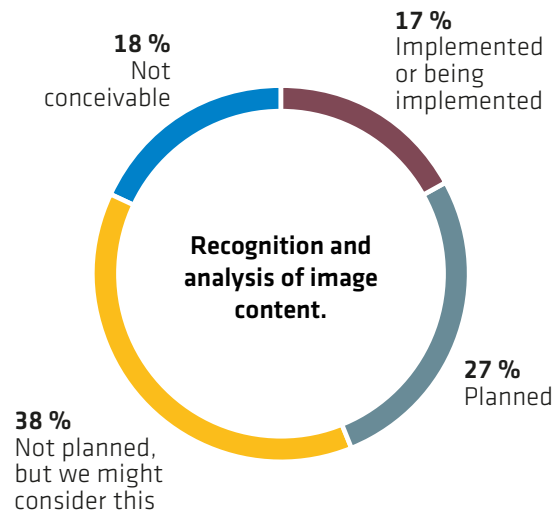
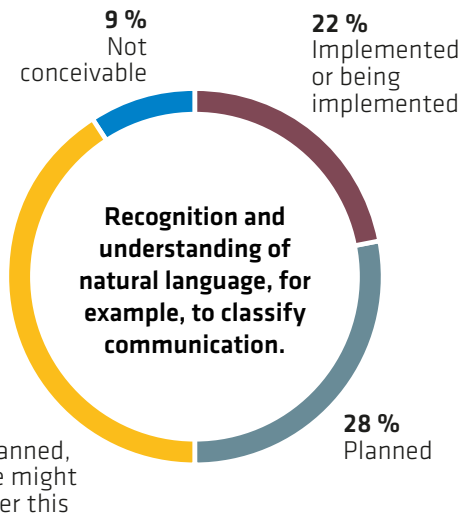
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DECISION-MAKERS CUSTOMERS



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DECISION-MAKERS CUSTOMERS




Source: adesso SE | ki.adesso.de

CHATBOTS SPECIAL

Can you understand me?

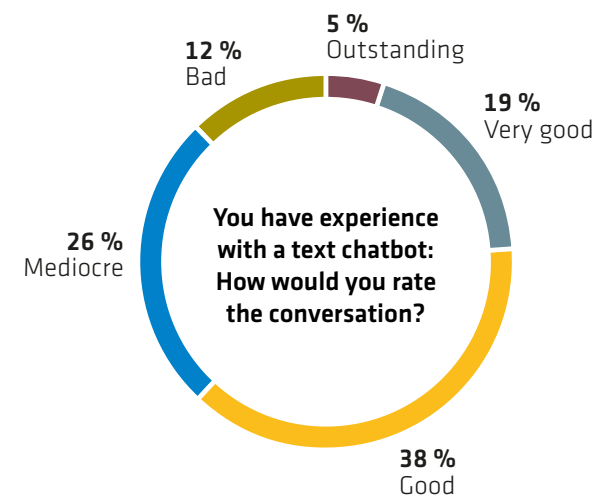
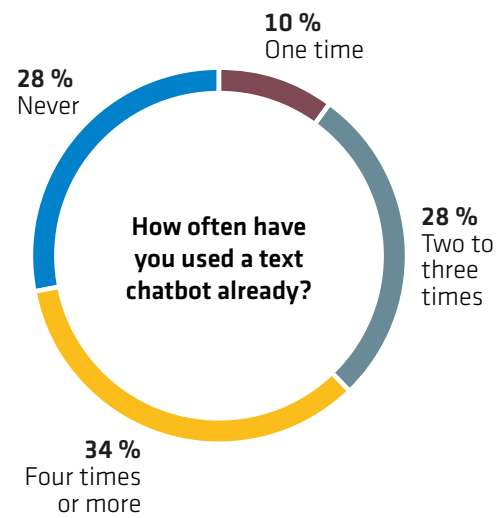
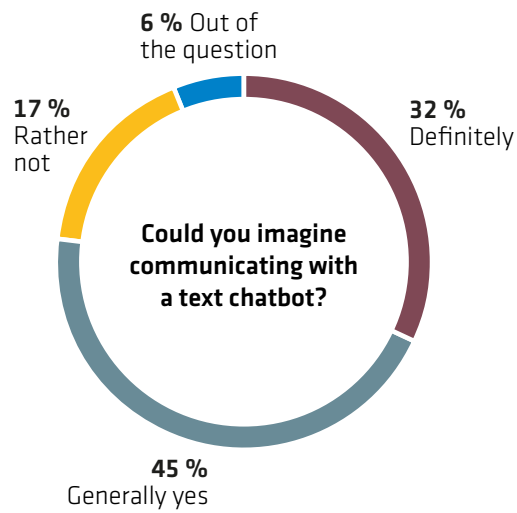
For some, it is one of the most practical applications of AI technologies ever. For others, it signifies the rebirth of annoying assistants like Microsoft's Clippit Office Assistant. There are countless opinions on the subject of chatbots. Acceptance on the part of the customers was one of the focal points of the survey. And the approval ratings are high: Almost 80 per cent of respondents can imagine using a chatbot in the form of a text chat. 62 per cent rate their experience with such a system as good or better.

However, it depends on the particular application. Only 41 per cent of respondents can imagine using a chatbot to open an account or have done so already. As an online shopping advisor, on the other hand, such an application is seen as viable by 77 per cent.



Faster:
88 per cent believe that chatbots reduce service-related waiting times.

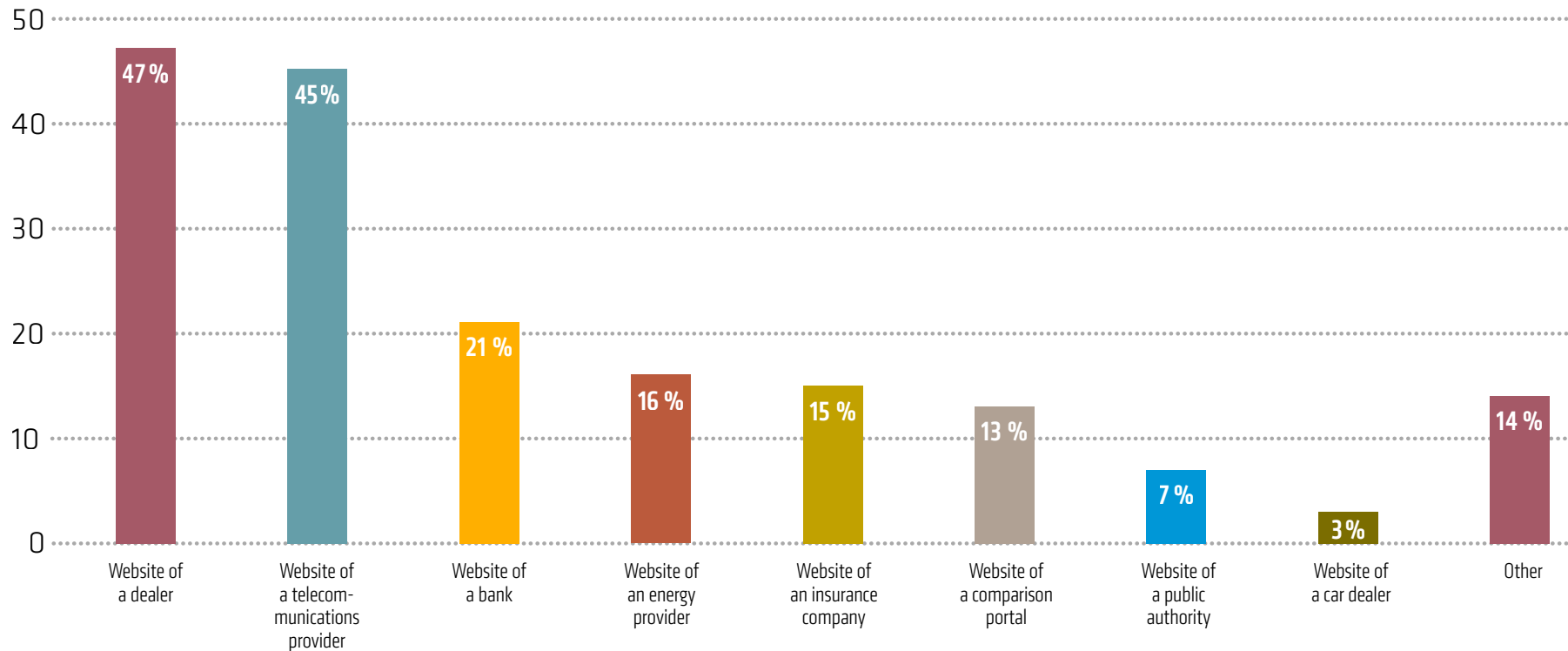
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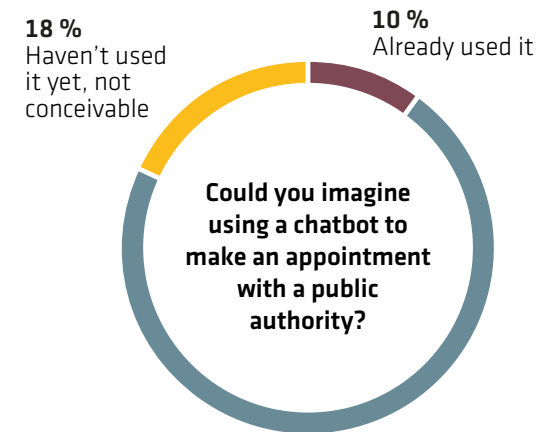
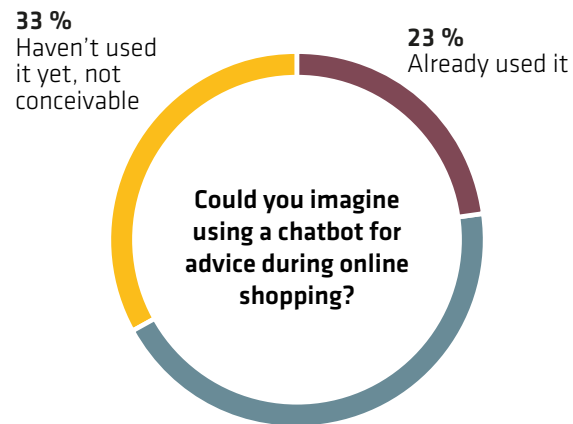
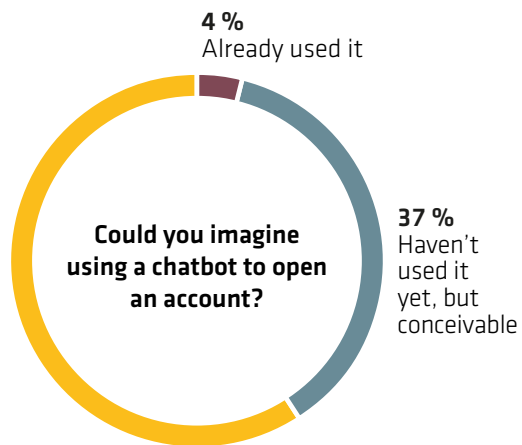
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If you already have experience with a chatbot, where do you use such an offer?



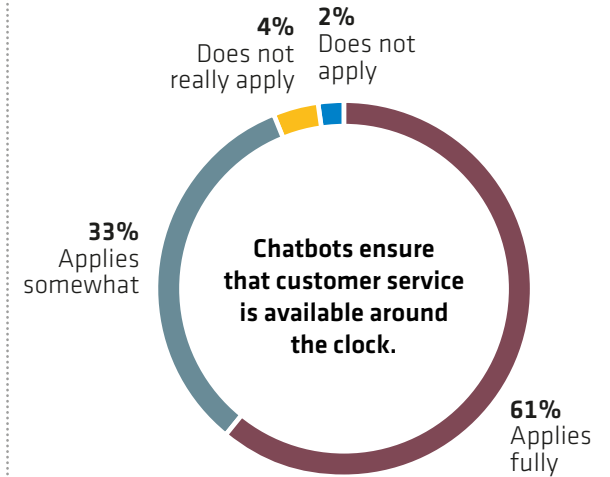
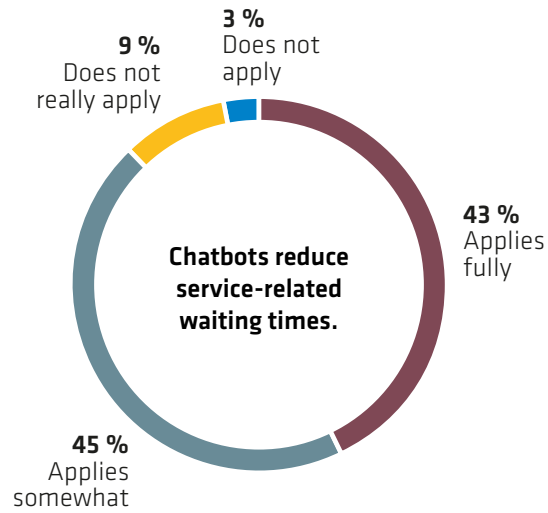
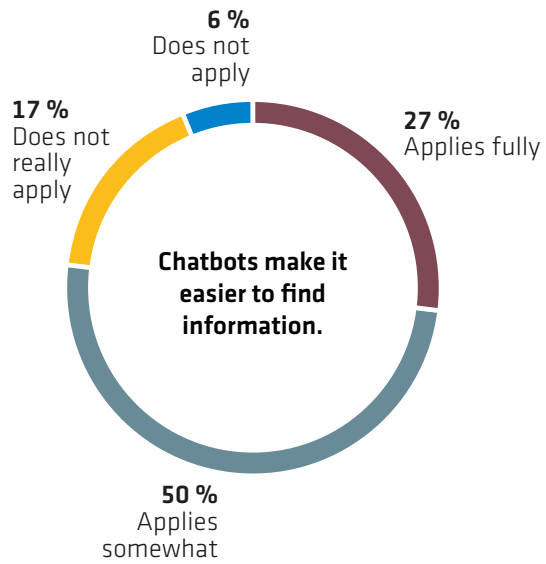
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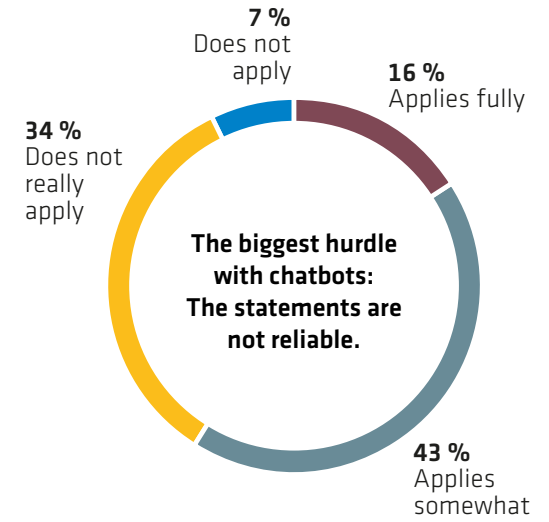
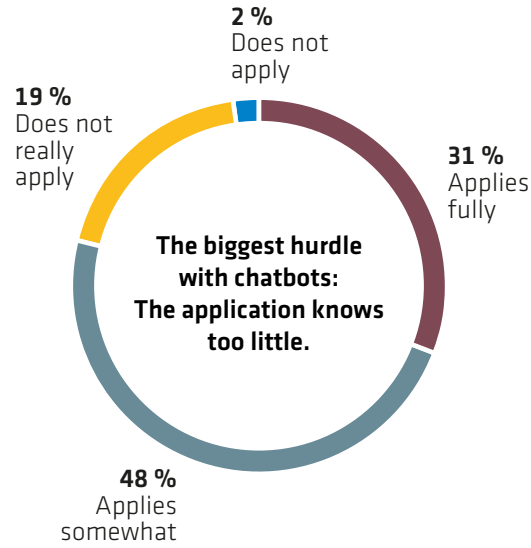
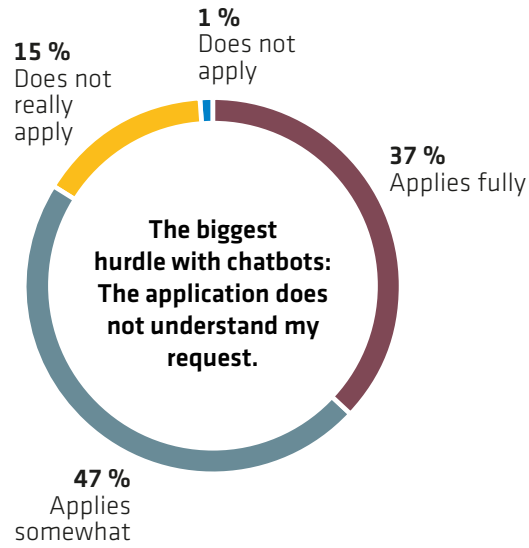
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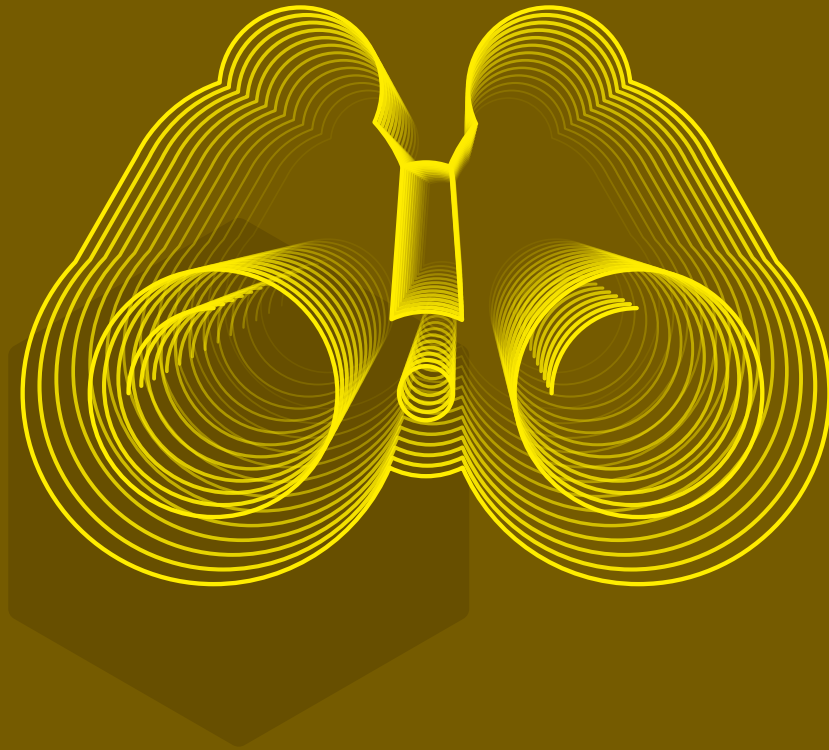


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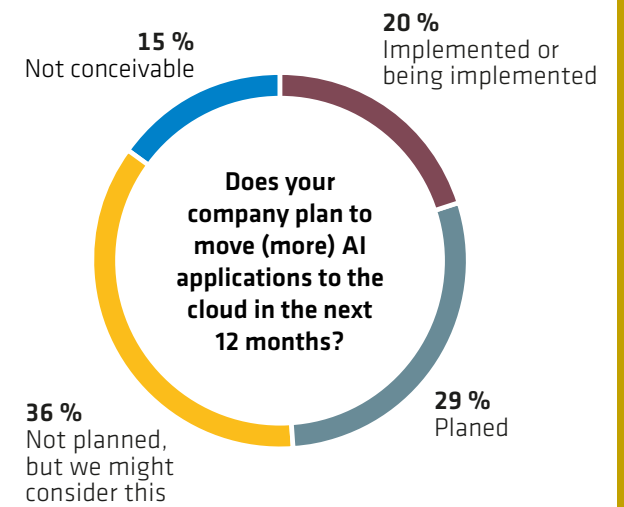
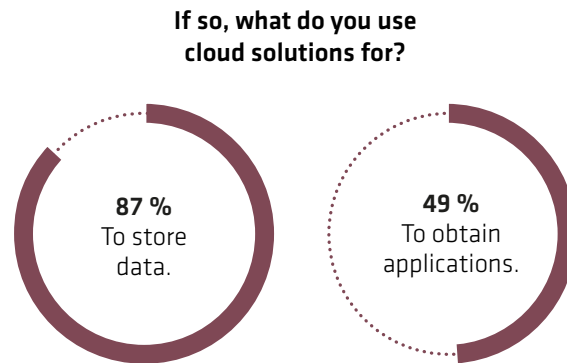
CLOUD SPECIAL

Cloudy with the prospect of AI

The technology behind many other technologies – Cloud offerings also play this role in the AI environment, as is confirmed by a considerable number of interviewees: 57 per cent of companies that already have experience with AI applications rely on cloud solutions in this environment. This is six percentage points more than in the 2020 survey. And the boom continues: Just under 50 per cent are planning to relocate (further) AI solutions or have already initiated this.

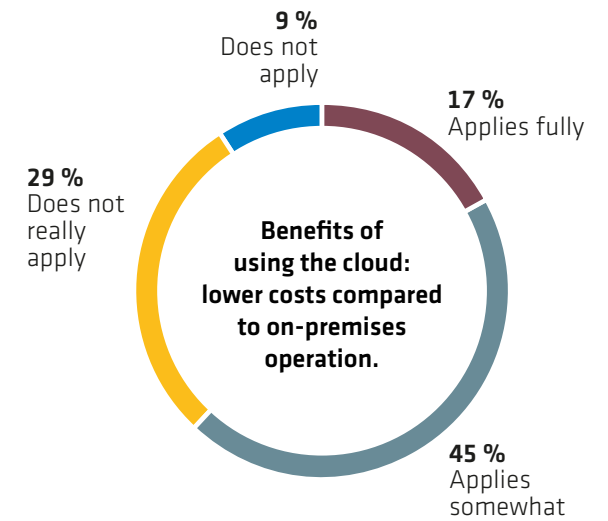
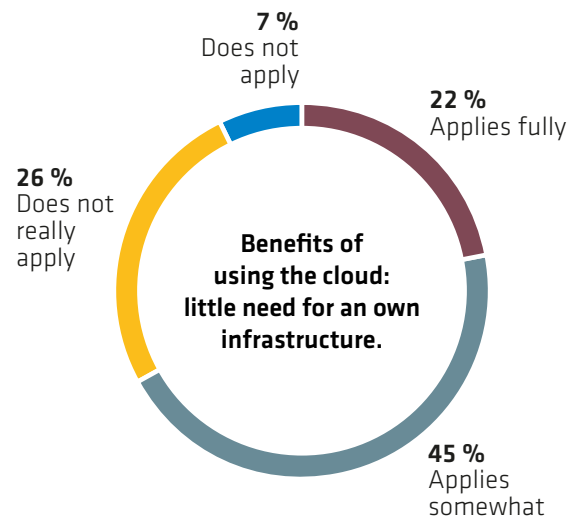
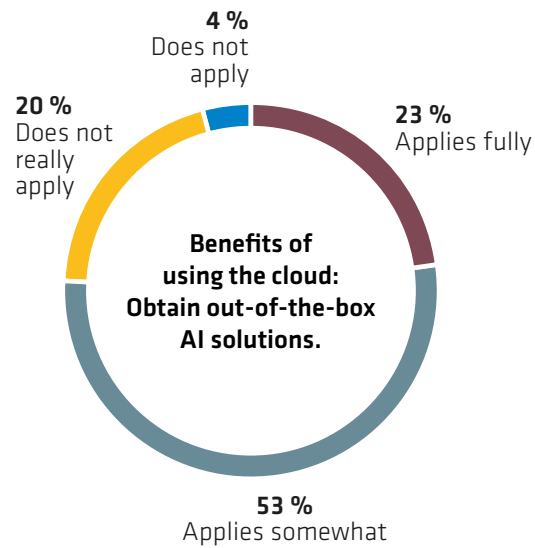
Traditionally, many managers see advantages in terms of costs and – closely linked to this – in the associated reduced investment in their own infrastructure. With regard to AI, the possibility of obtaining preconfigured applications via cloud offers is an added incentive. For 76 per cent of decision-makers, this represents the central cloud advantage. In contrast, the data protection guarantees of cloud providers are not very convincing. 62 per cent see this as the biggest hurdle in the cloud arena.

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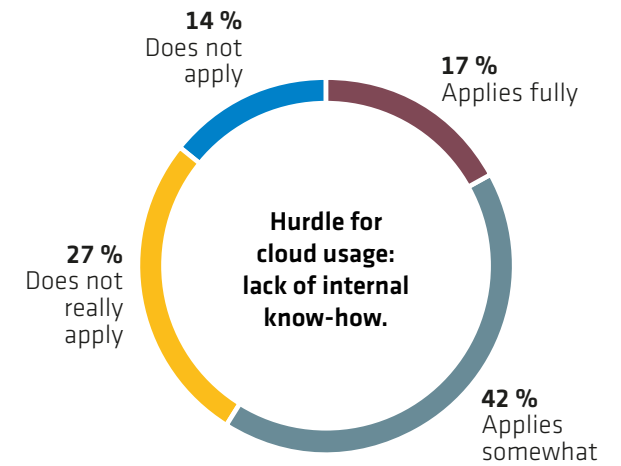
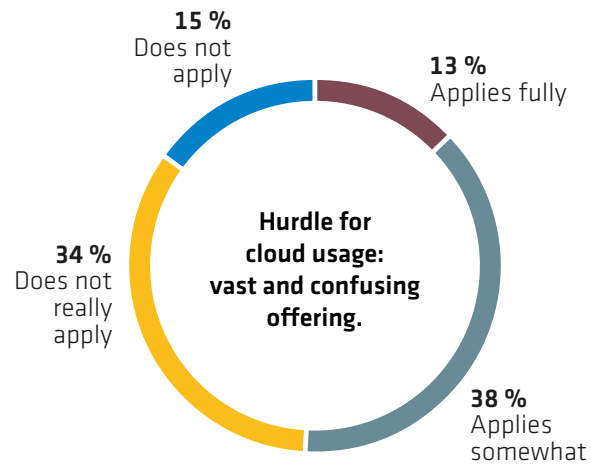
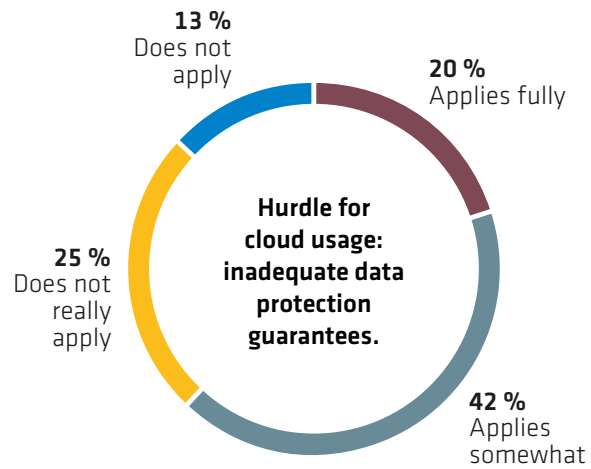
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Seeing processes differently – building systems differently



DISCOVERING USE CASES

Abstract mind games will not help you to see the potential of AI. But our use cases will – from chatbot to text analysis, from automated sales to automated communication processes.

Take a look at what AI is changing in the here and now: in the world of football, in the car, in business – and before long, in your company.

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BUILDING AI SYSTEMS

AI applications are the result of flawlessly planned and implemented projects. However, these systems pose different challenges to developers than traditional information systems. This has an impact on the way projects are structured, and it impacts the level of expertise required of those involved.

Our 'building AI-based systems' process model is our answer to these challenges.

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FINDING PROFESSIONALS

We have over 20 years of experience as an IT service provider when it comes to artificial intelligence. We can draw on tools, procedural models and processes that match your goals and meet your requirements. Our AI professionals are familiar with current technologies and know in detail how to develop business models and applications based on these.

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