

Public First - Google - EU Business Polling 2025



	Country															
	Total	Italy	Netherlands	France	Spain	Poland	Ireland	Belgium	Germany	Sweden	Romania	Finland	Czech Republic	Greece	Norway	Denmark
Unweighted	2348	146	141	283	146	139	141	137	148	139	141	138	135	279	114	121
Weighted	2348	310	65	289	182	246	22	45	719	50	162	31	92	84	21	29

To what extent are your organisation's work processes supported by digital technologies?

BASE: All Respondents

 Largely manual and	11%	10%	16%	15%	9%	12%	11%	8%	6%	16%	15%	8%	16%	13%	9%	12%
 Basic digital tools.	21%	17%	23%	16%	23%	19%	16%	24%	22%	22%	24%	29%	21%	27%	11%	20%
 Partial digital integr	20%	20%	29%	16%	16%	25%	13%	24%	19%	18%	20%	28%	21%	23%	23%	12%
 Significant digital int	32%	38%	24%	35%	37%	35%	38%	34%	32%	29%	23%	28%	23%	19%	39%	30%
 Fully digital and dat	16%	13%	6%	16%	15%	9%	21%	8%	21%	13%	15%	5%	15%	16%	15%	25%
Don't know	1%	1%	1%	1%	0%	0%	1%	1%	0%	2%	2%	2%	4%	0%	2%	0%
Prefer not to answer	0%	0%	1%	1%	0%	0%	0%	0%	0%	0%	1%	0%	0%	1%	0%	1%

What is the approximate percentage of your business processes that are fully digitized?Please consider core functions like Sales, Operations, and Finance.

BASE: All Respondents

None	4%	4%	5%	3%	4%	1%	3%	1%	4%	3%	6%	2%	6%	3%	3%	3%
Less than 10%	6%	7%	9%	6%	7%	5%	6%	9%	6%	4%	4%	12%	8%	7%	3%	3%
10% to 19%	10%	10%	14%	11%	13%	14%	11%	9%	6%	10%	13%	13%	15%	11%	7%	9%
20% to 39%	18%	18%	25%	21%	18%	18%	16%	22%	16%	15%	17%	24%	15%	20%	9%	16%
40% to 49%	13%	12%	12%	11%	12%	16%	15%	12%	12%	12%	17%	15%	11%	12%	16%	16%
50% to 59%	11%	10%	12%	9%	13%	11%	8%	17%	11%	16%	9%	10%	8%	12%	27%	12%
60% to 79%	17%	21%	12%	18%	13%	19%	16%	14%	18%	17%	13%	12%	12%	14%	22%	17%
80% top 89%	11%	8%	8%	12%	12%	10%	13%	7%	14%	13%	4%	10%	12%	10%	5%	10%
90% or more	5%	6%	0%	5%	3%	1%	13%	4%	7%	6%	11%	3%	5%	5%	4%	6%
All of them - fully digitize	3%	3%	2%	3%	5%	3%	0%	2%	2%	3%	4%	0%	1%	4%	2%	5%
Don't Know	2%	1%	1%	1%	0%	2%	0%	3%	4%	2%	0%	1%	5%	1%	1%	2%

Does your company have a dedicated budget for R&D or Technology Innovation?

BASE: All Respondents

Yes, a dedicated line item	35%	37%	24%	40%	40%	39%	31%	24%	37%	42%	21%	32%	25%	28%	36%	44%
Yes, as part of the general	38%	39%	43%	37%	37%	36%	36%	49%	37%	36%	49%	42%	37%	28%	38%	37%
No - no dedicated budget	25%	18%	32%	23%	23%	24%	32%	24%	26%	21%	27%	23%	35%	39%	24%	17%
Don't know	2%	6%	1%	0%	1%	0%	2%	2%	0%	1%	3%	3%	3%	5%	1%	2%

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Approximately, what percentage of your annual operating expenditure is currently allocated to IT/Technology costs?

BASE: All Respondents

Less than 1%	4%	3%	7%	2%	3%	3%	5%	3%	3%	6%	4%	11%	3%	2%	3%
1% to 4%	10%	10%	6%	8%	12%	3%	6%	13%	13%	10%	9%	8%	11%	3%	5%
5% to 9%	17%	16%	25%	20%	23%	15%	16%	21%	12%	19%	29%	17%	24%	11%	23%
10% to 19%	28%	30%	29%	25%	28%	34%	25%	25%	31%	20%	23%	34%	19%	17%	25%
20% to 29%	18%	17%	14%	21%	12%	23%	22%	18%	18%	21%	13%	25%	15%	19%	15%
30% to 39%	9%	12%	11%	11%	7%	11%	12%	8%	8%	9%	6%	6%	10%	9%	9%
40% to 49%	6%	4%	3%	5%	4%	1%	7%	4%	10%	10%	5%	1%	5%	7%	10%
50% or more	4%	4%	3%	4%	6%	5%	4%	1%	3%	3%	5%	2%	4%	5%	7%
Don't Know	4%	4%	1%	5%	4%	5%	3%	7%	4%	2%	5%	2%	8%	6%	3%

Over the last year, how has your company's average operational cost per unit of output/service changed? This is roughly the amount it costs your business to operate. If you are not sure, please give your best estimate.

BASE: All Respondents

Operation costs have inc	5%	4%	4%	4%	8%	3%	7%	4%	5%	5%	8%	1%	4%	13%	6%	5%
Operation costs have inc	12%	10%	11%	10%	16%	13%	15%	9%	12%	9%	22%	11%	15%	11%	8%	7%
Operation costs have inc	19%	15%	15%	17%	21%	17%	22%	18%	20%	21%	19%	22%	19%	23%	17%	12%
Operation costs have inc	19%	18%	26%	21%	20%	19%	22%	19%	19%	24%	16%	19%	22%	16%	21%	21%
Operation costs have inc	16%	17%	10%	15%	11%	18%	12%	17%	19%	15%	7%	20%	9%	12%	16%	20%
Operation costs have inc	7%	9%	11%	7%	6%	9%	9%	7%	6%	10%	4%	9%	5%	7%	13%	11%
Operation costs have inc	14%	19%	18%	17%	14%	13%	8%	11%	12%	11%	12%	11%	16%	10%	12%	17%
Operation costs have dei	2%	1%	1%	2%	0%	2%	1%	1%	3%	4%	0%	1%	1%	2%	1%	0%
Operation costs have dei	1%	1%	2%	1%	1%	3%	1%	2%	1%	0%	3%	1%	1%	2%	1%	4%
Operation costs have dei	1%	2%	0%	1%	1%	0%	0%	0%	2%	0%	2%	0%	1%	1%	1%	1%
Operation costs have dei	0%	0%	1%	0%	0%	0%	0%	1%	0%	0%	1%	1%	1%	1%	1%	1%
Operation costs have dei	0%	1%	0%	0%	0%	0%	0%	1%	1%	0%	0%	0%	1%	0%	0%	0%
Operation costs have dei	0%	0%	0%	0%	0%	1%	0%	1%	0%	0%	1%	0%	0%	0%	0%	0%
Don't Know	2%	3%	1%	2%	2%	2%	3%	6%	1%	2%	4%	1%	6%	2%	2%	1%

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In the last two years, how many major new products or services has your business launched? This may be new consumer or B2B products, new offerings

BASE: All Respondents

None - no new products	12%	12%	15%	10%	13%	6%	10%	11%	15%	10%	12%	11%	18%	15%	4%	5%
1 - 2	20%	20%	20%	14%	26%	21%	22%	21%	16%	11%	38%	26%	23%	26%	24%	18%
3 - 5	31%	32%	27%	31%	24%	30%	36%	39%	35%	35%	21%	22%	31%	26%	33%	33%
6 - 10	19%	15%	16%	22%	22%	22%	19%	13%	21%	23%	9%	30%	11%	11%	21%	19%
More than 10	9%	10%	8%	11%	9%	11%	5%	6%	6%	13%	10%	1%	5%	13%	9%	15%
N/A - does not make sense	8%	9%	12%	10%	5%	9%	7%	4%	7%	5%	7%	9%	10%	7%	7%	10%
Don't Know	1%	2%	2%	2%	1%	1%	2%	5%	0%	3%	2%	0%	2%	1%	2%	0%

What proportion of your current revenue is generated by products or services launched in the last two years?

BASE: Have launched products

Less than 1%	2%	3%	3%	2%	3%	1%	3%	2%	0%	1%	4%	2%	2%	3%	1%	1%
1% to 4%	7%	9%	7%	6%	8%	5%	8%	10%	3%	9%	12%	5%	15%	8%	5%	3%
5% to 9%	20%	18%	20%	24%	18%	15%	17%	27%	20%	15%	22%	17%	16%	24%	14%	25%
10% to 19%	29%	35%	27%	26%	27%	33%	28%	22%	30%	24%	27%	40%	13%	26%	29%	25%
20% to 29%	20%	12%	20%	25%	19%	22%	24%	18%	18%	23%	21%	24%	27%	23%	24%	14%
30% to 39%	12%	14%	12%	7%	15%	13%	9%	14%	13%	13%	6%	8%	21%	6%	13%	15%
40% to 49%	6%	6%	3%	5%	3%	3%	5%	2%	9%	6%	5%	1%	2%	1%	6%	10%
50% or more	5%	3%	6%	4%	6%	4%	5%	3%	6%	9%	2%	3%	2%	3%	4%	6%
Don't Know	2%	1%	1%	2%	0%	3%	0%	1%	1%	1%	0%	0%	2%	5%	4%	1%

In general, which of the following do you think are likely to have the biggest positive impact on your business in the next 5 years? Select up to three of the following

BASE: All Respondents

The advances in AI technology	49%	46%	51%	53%	50%	39%	43%	41%	55%	50%	44%	34%	47%	44%	45%	43%
Improvements to education	24%	22%	15%	23%	31%	35%	19%	22%	21%	24%	22%	22%	28%	38%	16%	18%
The advances in computing	23%	24%	21%	21%	23%	24%	24%	18%	26%	20%	19%	22%	28%	20%	28%	19%
Improvements to local infrastructure	22%	17%	17%	16%	15%	30%	20%	20%	26%	23%	24%	22%	12%	26%	25%	14%
The advances in internet	22%	19%	20%	18%	25%	23%	23%	23%	24%	18%	23%	27%	13%	24%	16%	24%
The green transition and sustainability	21%	23%	18%	28%	16%	18%	21%	23%	21%	32%	21%	17%	8%	14%	37%	25%
Deepening of the EU-single market	19%	22%	17%	21%	18%	22%	17%	21%	17%	16%	20%	20%	15%	14%	27%	26%
New trade agreements with other countries	18%	15%	12%	18%	14%	29%	21%	15%	17%	17%	22%	16%	13%	24%	23%	22%
Normalisation of flexible working hours	18%	17%	17%	20%	23%	18%	24%	13%	17%	23%	19%	14%	13%	12%	25%	20%
None of the above are likely to have a positive impact	8%	10%	10%	7%	7%	7%	7%	6%	9%	4%	6%	8%	12%	5%	4%	6%
Don't Know	2%	2%	1%	2%	5%	1%	3%	6%	1%	3%	4%	6%	6%	2%	0%	5%

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There has recently been some discussion in the news about "Artificial Intelligence" or "AI". This is where computers are used to carry out tasks which would normally need a human to do them. How much would you say you know :

BASE: All Respondents

I know a lot about AI	37%	36%	23%	38%	26%	23%	36%	28%	51%	36%	25%	27%	21%	39%	39%	49%
I know a moderate amount about AI	40%	47%	52%	37%	41%	45%	35%	46%	35%	42%	39%	57%	41%	42%	43%	30%
I know a little about AI	21%	14%	23%	23%	33%	29%	24%	22%	12%	20%	34%	13%	34%	16%	16%	17%
I know nothing at all about AI	2%	1%	3%	2%	1%	2%	5%	1%	1%	0%	2%	2%	4%	3%	3%	3%
Don't Know	0%	1%	0%	0%	1%	0%	0%	2%	0%	1%	0%	2%	0%	0%	0%	1%

When it comes to determining which AI product (eg. ChatGPT, Anthropic, Gemini) to use in your business, what are the biggest factors in decision between products? Select any which apply

BASE: All Respondents

Safety and security	52%	45%	40%	55%	48%	57%	47%	39%	53%	50%	60%	58%	45%	56%	58%	49%
Features and functionality	50%	59%	35%	50%	59%	58%	36%	43%	44%	48%	51%	49%	55%	50%	48%	43%
Cost of the product	43%	35%	34%	41%	47%	41%	52%	43%	46%	34%	45%	45%	48%	50%	35%	39%
Regulatory compliance	38%	37%	36%	43%	43%	34%	42%	33%	42%	34%	37%	22%	25%	24%	33%	33%
Transparency into how it works	38%	37%	31%	38%	34%	30%	35%	28%	46%	43%	45%	18%	20%	35%	27%	31%
Clear use cases and examples	36%	41%	31%	33%	38%	33%	28%	26%	40%	34%	29%	35%	29%	35%	44%	26%
Keeping data and computing power in EU	27%	26%	26%	24%	29%	19%	30%	23%	34%	29%	22%	20%	15%	23%	38%	23%
Staff familiarity with the product	25%	20%	27%	20%	24%	28%	21%	22%	28%	28%	27%	16%	22%	36%	26%	19%
Existing contracts with other providers	17%	14%	20%	17%	17%	18%	13%	15%	18%	23%	17%	15%	13%	18%	22%	16%
Don't Know	4%	5%	7%	3%	3%	6%	4%	5%	4%	4%	4%	3%	8%	3%	3%	3%
Other (Please specify)	1%	0%	1%	1%	0%	0%	1%	1%	1%	1%	0%	1%	0%	0%	0%	1%

In general, how likely do you think it is that your business will explore AI tools more in the next year?

BASE: All Respondents

Very likely	46%	45%	36%	46%	55%	32%	45%	29%	54%	44%	47%	29%	30%	39%	41%	45%
Somewhat likely	35%	36%	38%	34%	28%	47%	28%	43%	31%	34%	31%	46%	38%	35%	46%	35%
Neither likely or unlikely	9%	9%	14%	11%	8%	13%	9%	17%	5%	10%	10%	10%	14%	22%	6%	8%
Somewhat unlikely	4%	3%	6%	3%	4%	5%	9%	3%	3%	4%	7%	11%	9%	3%	1%	5%
Not at all likely	5%	5%	6%	6%	4%	2%	8%	6%	6%	6%	4%	2%	8%	2%	6%	5%
Don't Know	1%	1%	1%	0%	1%	1%	1%	1%	0%	2%	1%	2%	2%	1%	0%	1%

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Does your business currently use any AI technology to do the following? Please select all that apply.

BASE: All Respondents

Data analysis	54%	52%	42%	51%	54%	56%	47%	49%	63%	51%	50%	44%	45%	46%	41%	48%
Information retrieval (e.g. search engines)	46%	47%	39%	43%	48%	45%	31%	29%	52%	49%	44%	28%	39%	40%	47%	43%
Help with drafting/writing	44%	41%	36%	40%	46%	39%	40%	33%	51%	33%	46%	44%	35%	40%	46%	39%
Automate repetitive tasks	41%	36%	36%	52%	46%	44%	33%	43%	41%	47%	37%	36%	33%	27%	41%	36%
Optimise and maximise resources	37%	42%	18%	38%	34%	37%	25%	23%	41%	30%	31%	26%	28%	33%	39%	34%
Automate customer support	34%	33%	34%	34%	37%	41%	30%	26%	36%	40%	30%	27%	21%	33%	29%	34%
Automate other internal processes	30%	23%	30%	29%	38%	32%	22%	28%	35%	34%	24%	21%	27%	19%	33%	29%
Not applicable - we don't use AI	10%	6%	9%	9%	9%	8%	13%	12%	11%	8%	12%	8%	15%	11%	10%	10%
None of the above - but we use AI	3%	3%	4%	5%	2%	1%	4%	5%	1%	3%	2%	3%	7%	5%	1%	2%
Don't Know	1%	2%	2%	1%	1%	2%	2%	2%	0%	1%	1%	6%	3%	2%	0%	1%

You said your business currently uses AI technology for the following. Has your business' use of AI in this way increased or decreased in the last year?: Automate repetitive tasks

BASE: Uses AI

Greatly increased	45%	44%	26%	49%	44%	33%	40%	38%	52%	35%	38%	45%	48%	40%	27%	49%
Somewhat increased	44%	42%	51%	39%	48%	61%	46%	45%	35%	54%	54%	52%	40%	53%	49%	30%
Neither increased nor decreased	10%	14%	17%	11%	5%	5%	9%	11%	12%	7%	8%	1%	9%	7%	15%	20%
Somewhat decreased	1%	0%	2%	0%	1%	0%	2%	5%	0%	3%	0%	2%	4%	0%	0%	1%
Greatly decreased	0%	0%	3%	0%	1%	0%	3%	0%	0%	0%	0%	0%	0%	0%	5%	0%
Don't Know	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	4%	0%

You said your business currently uses AI technology for the following. Has your business' use of AI in this way increased or decreased in the last year?: Automate customer support

BASE: Uses AI

Greatly increased	42%	44%	39%	34%	28%	38%	44%	33%	52%	34%	37%	43%	37%	42%	43%	40%
Somewhat increased	46%	42%	42%	51%	59%	42%	51%	56%	44%	46%	49%	47%	52%	40%	43%	51%
Neither increased nor decreased	11%	11%	16%	13%	12%	20%	5%	4%	4%	17%	14%	5%	11%	18%	9%	6%
Somewhat decreased	1%	1%	3%	2%	0%	0%	0%	6%	0%	2%	0%	4%	0%	0%	2%	3%
Greatly decreased	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%	0%
Don't Know	0%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

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You said your business currently uses AI technology for the following. Has your business' use of AI in this way increased or decreased in the last year?: Help with drafting/writing documents

BASE: Uses AI

Greatly increased	40%	38%	41%	36%	49%	36%	35%	31%	42%	35%	42%	31%	46%	39%	33%	32%
Somewhat increased	47%	41%	43%	48%	45%	50%	46%	60%	48%	58%	47%	52%	48%	45%	44%	53%
Neither increased nor decreased	11%	21%	12%	14%	5%	8%	12%	7%	8%	7%	11%	14%	7%	14%	16%	11%
Somewhat decreased	1%	0%	2%	2%	1%	4%	6%	2%	1%	0%	0%	0%	0%	1%	4%	1%
Greatly decreased	1%	0%	1%	0%	0%	2%	1%	0%	1%	0%	0%	0%	0%	0%	3%	2%
Don't Know	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	3%	0%	1%	0%	0%

You said your business currently uses AI technology for the following. Has your business' use of AI in this way increased or decreased in the last year?: Data analysis

BASE: Uses AI

Greatly increased	47%	37%	45%	37%	52%	45%	38%	40%	55%	32%	50%	33%	56%	44%	40%	36%
Somewhat increased	40%	46%	36%	42%	40%	44%	44%	48%	34%	55%	42%	50%	29%	45%	41%	44%
Neither increased nor decreased	12%	17%	19%	16%	8%	11%	16%	10%	10%	13%	7%	12%	14%	11%	13%	19%
Somewhat decreased	1%	0%	0%	4%	0%	0%	0%	0%	1%	0%	1%	3%	1%	1%	4%	0%
Greatly decreased	0%	0%	0%	0%	0%	0%	1%	2%	0%	0%	0%	0%	0%	0%	2%	0%
Don't Know	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	2%	0%	0%	0%	1%

You said your business currently uses AI technology for the following. Has your business' use of AI in this way increased or decreased in the last year?: Information retrieval (e.g. using AI to search the web or internal company data)

BASE: Uses AI

Greatly increased	46%	50%	32%	49%	44%	30%	46%	26%	58%	36%	35%	42%	35%	30%	26%	35%
Somewhat increased	40%	32%	51%	41%	45%	43%	43%	58%	34%	55%	51%	40%	55%	56%	49%	50%
Neither increased nor decreased	12%	18%	15%	8%	10%	22%	11%	16%	7%	10%	14%	11%	10%	14%	8%	13%
Somewhat decreased	1%	0%	2%	2%	1%	3%	0%	0%	1%	0%	0%	5%	0%	0%	8%	2%
Greatly decreased	0%	0%	0%	0%	0%	2%	0%	0%	0%	0%	0%	0%	0%	0%	9%	0%
Don't Know	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	2%	0%	0%	0%	0%

You said your business currently uses AI technology for the following. Has your business' use of AI in this way increased or decreased in the last year?: Optimise and maximise marketing and sales activity

BASE: Uses AI

Greatly increased	40%	40%	21%	41%	45%	33%	41%	23%	39%	40%	52%	44%	46%	50%	32%	40%
Somewhat increased	44%	48%	41%	43%	46%	47%	48%	50%	45%	46%	32%	35%	40%	39%	41%	50%
Neither increased nor decreased	14%	11%	32%	13%	7%	21%	9%	21%	14%	12%	16%	18%	14%	10%	14%	6%
Somewhat decreased	2%	2%	6%	1%	2%	0%	0%	7%	2%	2%	0%	3%	0%	0%	11%	4%
Greatly decreased	0%	0%	0%	2%	0%	0%	2%	0%	0%	0%	0%	0%	0%	0%	2%	0%
Don't Know	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%

You said your business currently uses AI technology for the following. Has your business' use of AI in this way increased or decreased in the last year?: Automate other internal systems

BASE: Uses AI

Greatly increased	38%	37%	22%	34%	43%	41%	46%	25%	38%	25%	55%	30%	45%	38%	37%	34%
Somewhat increased	47%	33%	48%	50%	41%	43%	32%	51%	54%	57%	38%	48%	47%	55%	38%	44%
Neither increased nor decreased	13%	29%	25%	10%	15%	15%	14%	14%	8%	18%	5%	22%	7%	7%	19%	19%

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	Country															
	Total	Italy	Netherlands	France	Spain	Poland	Ireland	Belgium	Germany	Sweden	Romania	Finland	Czech Republic	Greece	Norway	Denmark
Unweighted	2348	146	141	283	146	139	141	137	148	139	141	138	135	279	114	121
Weighted	2348	310	65	289	182	246	22	45	719	50	162	31	92	84	21	29
Somewhat decreased	1%	0%	5%	4%	1%	1%	5%	7%	0%	0%	0%	0%	0%	0%	5%	4%
Greatly decreased	0%	0%	0%	1%	0%	0%	3%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't Know	0%	0%	0%	1%	0%	0%	0%	3%	0%	0%	2%	0%	0%	0%	0%	0%

In the past year, has your business invested in AI tools which take over tasks currently performed by humans?

BASE: All Respondents

Yes	60%	59%	45%	65%	63%	61%	57%	59%	63%	62%	53%	54%	43%	46%	69%	62%
No	38%	38%	52%	33%	34%	38%	37%	36%	35%	34%	45%	40%	54%	49%	29%	37%
Don't Know	3%	4%	3%	2%	3%	1%	6%	4%	2%	3%	2%	6%	3%	5%	2%	1%

You said your business has invested in AI tools which take over tasks currently performed by humans in the past year. Which of the following, if any, has your business done as a result of this?: Reallocated employees freed-up time

BASE: Has invested in AI tools

We have done this	78%	79%	71%	76%	79%	75%	75%	66%	81%	74%	87%	65%	76%	75%	67%	77%
We have not done this	19%	17%	28%	20%	21%	21%	23%	30%	17%	25%	13%	29%	22%	23%	30%	23%
Don't Know	2%	3%	2%	4%	0%	4%	2%	3%	1%	1%	0%	6%	2%	2%	2%	0%

You said your business has invested in AI tools which take over tasks currently performed by humans in the past year. Which of the following, if any, has your business done as a result of this?: Reduced employee pay

BASE: Has invested in AI tools

We have done this	25%	25%	15%	24%	23%	28%	34%	25%	27%	30%	24%	32%	10%	18%	25%	34%
We have not done this	73%	75%	85%	74%	76%	71%	63%	70%	70%	69%	73%	67%	90%	82%	74%	66%
Don't Know	2%	0%	0%	2%	1%	1%	3%	5%	3%	1%	4%	1%	0%	0%	1%	0%

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	Country															
	Total	Italy	Netherlands	France	Spain	Poland	Ireland	Belgium	Germany	Sweden	Romania	Finland	Czech Republic	Greece	Norway	Denmark
Unweighted	2348	146	141	283	146	139	141	137	148	139	141	138	135	279	114	121
Weighted	2348	310	65	289	182	246	22	45	719	50	162	31	92	84	21	29

You said your business has invested in AI tools which take over tasks currently performed by humans in the past year. Which of the following, if any, has your business done as a result of this?: Increased employee pay

BASE: Has invested in AI tools

We have done this	63%	72%	54%	57%	56%	74%	52%	37%	63%	63%	51%	59%	69%	50%	58%	80%
We have not done this	36%	28%	44%	41%	43%	26%	46%	61%	33%	36%	45%	36%	28%	50%	41%	20%
Don't Know	2%	0%	2%	2%	1%	0%	2%	2%	4%	1%	3%	4%	3%	0%	1%	0%

You said your business has invested in AI tools which take over tasks currently performed by humans in the past year. Which of the following, if any, has your business done as a result of this?: Reduced the number of hours you exp

BASE: Has invested in AI tools

We have done this	46%	54%	45%	40%	44%	48%	44%	37%	44%	52%	50%	42%	45%	38%	52%	56%
We have not done this	52%	46%	53%	59%	55%	52%	52%	61%	53%	48%	49%	48%	50%	62%	44%	42%
Don't Know	2%	0%	2%	1%	1%	0%	4%	3%	3%	0%	1%	10%	5%	0%	3%	2%

You said your business has invested in AI tools which take over tasks currently performed by humans in the past year. Which of the following, if any, has your business done as a result of this?: Reduced the size of your workforce

BASE: Has invested in AI tools

We have done this	32%	41%	40%	27%	28%	32%	42%	39%	26%	40%	42%	42%	37%	23%	35%	51%
We have not done this	67%	57%	58%	71%	72%	68%	54%	59%	72%	60%	56%	50%	62%	76%	57%	47%
Don't Know	1%	1%	2%	2%	0%	0%	4%	1%	1%	1%	2%	7%	1%	2%	7%	1%

You said your business has invested in AI tools which take over tasks currently performed by humans in the past year. Which of the following, if any, has your business done as a result of this?: Reskilled existing employees

BASE: Has invested in AI tools

We have done this	69%	74%	56%	64%	69%	68%	76%	56%	70%	70%	76%	71%	65%	87%	49%	66%
We have not done this	29%	23%	43%	35%	31%	31%	22%	42%	28%	29%	23%	21%	35%	13%	49%	33%
Don't Know	2%	3%	1%	1%	1%	1%	2%	2%	3%	1%	1%	8%	0%	0%	2%	2%

You said your business has invested in AI tools which take over tasks currently performed by humans in the past year. Which of the following, if any, has your business done as a result of this?: Hired new people to support deployment

BASE: Has invested in AI tools

We have done this	72%	76%	68%	75%	69%	75%	72%	68%	74%	71%	71%	70%	56%	63%	63%	84%
We have not done this	26%	24%	32%	24%	27%	25%	27%	32%	24%	25%	28%	23%	43%	34%	32%	16%
Don't Know	2%	0%	0%	1%	5%	0%	1%	0%	2%	3%	1%	6%	1%	3%	5%	0%

In the future, does your business plan to invest in AI tools which take over tasks currently performed by humans?

BASE: All Respondents

Yes, in the next year	28%	26%	23%	38%	33%	29%	22%	28%	28%	27%	22%	16%	22%	15%	29%	31%
Yes, in the next two year	30%	28%	25%	27%	29%	25%	25%	27%	36%	25%	29%	27%	17%	30%	34%	22%
Yes, in the next five year:	15%	12%	21%	15%	17%	18%	17%	18%	9%	21%	16%	29%	25%	24%	10%	15%
Yes, in the next ten years	5%	3%	8%	2%	5%	8%	7%	8%	4%	5%	8%	5%	5%	6%	4%	6%
Yes, but not in the next t	2%	3%	4%	2%	1%	4%	2%	3%	2%	4%	2%	3%	2%	2%	2%	0%
No, we do not plan to	15%	19%	16%	13%	9%	10%	23%	13%	16%	14%	18%	14%	25%	16%	17%	22%
Don't Know	5%	8%	3%	3%	6%	5%	5%	3%	4%	4%	5%	6%	5%	8%	3%	4%

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	Country															
	Total	Italy	Netherlands	France	Spain	Poland	Ireland	Belgium	Germany	Sweden	Romania	Finland	Czech Republic	Greece	Norway	Denmark
Unweighted	2348	146	141	283	146	139	141	137	148	139	141	138	135	279	114	121
Weighted	2348	310	65	289	182	246	22	45	719	50	162	31	92	84	21	29

You said you will invest in AI tools which take over tasks currently performed by humans in the next five years. How likely or unlikely is your business to do the following as a result of this?: Reallocate employees freed-up time to other tasks

BASE: Will invest in next 5 years

Very likely	34%	25%	28%	38%	36%	34%	42%	23%	34%	31%	49%	31%	36%	32%	29%	36%
Somewhat likely	44%	54%	49%	39%	43%	44%	36%	44%	46%	42%	32%	50%	38%	39%	33%	43%
Neither likely nor unlikely	17%	18%	22%	15%	15%	17%	18%	26%	18%	20%	15%	13%	17%	22%	25%	15%
Somewhat unlikely	2%	1%	2%	4%	2%	4%	4%	5%	0%	5%	1%	4%	7%	4%	4%	1%
Very unlikely	2%	1%	0%	2%	2%	0%	1%	3%	2%	1%	3%	2%	2%	2%	6%	3%
Don't Know	1%	1%	0%	2%	1%	1%	0%	0%	0%	1%	0%	0%	1%	1%	3%	3%

You said you will invest in AI tools which take over tasks currently performed by humans in the next five years. How likely or unlikely is your business to do the following as a result of this?: Reduce employee pay

BASE: Will invest in next 5 years

Very likely	13%	10%	4%	10%	8%	14%	12%	2%	20%	13%	18%	10%	1%	5%	9%	36%
Somewhat likely	17%	19%	21%	13%	18%	15%	25%	20%	17%	22%	18%	24%	13%	16%	24%	31%
Neither likely nor unlikely	18%	18%	29%	17%	20%	16%	25%	30%	14%	21%	20%	28%	18%	29%	33%	11%
Somewhat unlikely	25%	26%	19%	16%	20%	34%	21%	23%	29%	18%	22%	21%	34%	29%	20%	9%
Very unlikely	26%	27%	26%	44%	31%	22%	17%	24%	20%	25%	20%	17%	31%	20%	13%	12%
Don't Know	1%	0%	1%	1%	2%	0%	0%	1%	0%	1%	2%	0%	3%	1%	1%	1%

You said you will invest in AI tools which take over tasks currently performed by humans in the next five years. How likely or unlikely is your business to do the following as a result of this?: Increase employee pay

BASE: Will invest in next 5 years

Very likely	22%	19%	17%	19%	17%	26%	17%	7%	28%	14%	24%	15%	13%	18%	23%	32%
Somewhat likely	43%	41%	46%	40%	41%	53%	41%	35%	44%	43%	45%	36%	51%	31%	26%	33%
Neither likely nor unlikely	25%	29%	29%	25%	29%	17%	34%	31%	22%	34%	22%	36%	25%	36%	28%	19%
Somewhat unlikely	7%	10%	5%	10%	7%	4%	7%	17%	4%	6%	9%	11%	5%	11%	9%	9%
Very unlikely	2%	1%	2%	5%	4%	0%	1%	7%	2%	2%	1%	2%	3%	3%	12%	4%
Don't Know	1%	1%	1%	2%	1%	1%	0%	2%	0%	0%	1%	0%	1%	1%	2%	3%

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	Total	Country														
		Italy	Netherlands	France	Spain	Poland	Ireland	Belgium	Germany	Sweden	Romania	Finland	Czech Republic	Greece	Norway	Denmark
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Weighted	2348	310	65	289	182	246	22	45	719	50	162	31	92	84	21	29

You said you will invest in AI tools which take over tasks currently performed by humans in the next five years. How likely or unlikely is your business to do the following as a result of this?: Reduce the number of hours you expect e

BASE: Will invest in next 5 years

Very likely	21%	16%	14%	17%	14%	20%	14%	13%	28%	17%	30%	10%	13%	11%	19%	30%
Somewhat likely	33%	38%	42%	25%	46%	45%	38%	28%	28%	38%	28%	38%	25%	29%	31%	38%
Neither likely nor unlikely	24%	30%	28%	24%	23%	19%	21%	28%	22%	23%	21%	35%	27%	34%	17%	13%
Somewhat unlikely	14%	7%	10%	17%	12%	9%	14%	25%	16%	18%	14%	11%	23%	17%	22%	8%
Very unlikely	8%	7%	4%	17%	4%	6%	13%	6%	6%	3%	6%	3%	10%	8%	7%	8%
Don't Know	1%	2%	1%	0%	1%	0%	0%	1%	0%	1%	0%	2%	3%	0%	3%	2%

You said you will invest in AI tools which take over tasks currently performed by humans in the next five years. How likely or unlikely is your business to do the following as a result of this?: Reduce the size of your workforce

BASE: Will invest in next 5 years

Very likely	18%	11%	11%	12%	16%	16%	20%	12%	25%	13%	24%	11%	12%	11%	17%	22%
Somewhat likely	28%	30%	36%	26%	25%	20%	31%	30%	28%	25%	33%	39%	21%	32%	27%	37%
Neither likely nor unlikely	25%	28%	28%	25%	26%	28%	20%	31%	22%	28%	27%	26%	31%	29%	30%	19%
Somewhat unlikely	16%	21%	17%	17%	14%	21%	17%	19%	12%	25%	11%	15%	20%	14%	11%	12%
Very unlikely	13%	13%	6%	19%	16%	14%	12%	9%	12%	7%	6%	9%	16%	14%	14%	8%
Don't Know	1%	0%	1%	1%	3%	1%	1%	0%	0%	1%	0%	1%	1%	1%	1%	1%

You said you will invest in AI tools which take over tasks currently performed by humans in the next five years. How likely or unlikely is your business to do the following as a result of this?: Reskill existing employees

BASE: Will invest in next 5 years

Very likely	39%	35%	29%	40%	33%	34%	46%	26%	47%	44%	42%	29%	26%	34%	28%	41%
Somewhat likely	40%	43%	36%	44%	50%	38%	32%	47%	34%	34%	42%	48%	40%	44%	34%	39%
Neither likely nor unlikely	15%	18%	26%	10%	13%	21%	14%	17%	12%	14%	15%	15%	24%	19%	18%	15%
Somewhat unlikely	4%	2%	8%	2%	1%	7%	7%	4%	5%	4%	1%	7%	5%	2%	8%	1%
Very unlikely	2%	2%	2%	2%	2%	0%	1%	5%	2%	4%	1%	0%	4%	1%	10%	1%
Don't Know	0%	0%	0%	1%	1%	0%	0%	0%	0%	1%	0%	0%	2%	0%	2%	3%

You said you will invest in AI tools which take over tasks currently performed by humans in the next five years. How likely or unlikely is your business to do the following as a result of this?: Hire new people to support deployment o

BASE: Will invest in next 5 years

Very likely	33%	39%	23%	33%	28%	22%	38%	31%	38%	29%	36%	24%	29%	23%	28%	38%
Somewhat likely	42%	36%	46%	40%	48%	51%	36%	39%	41%	52%	35%	47%	37%	48%	38%	30%
Neither likely nor unlikely	16%	15%	19%	16%	17%	19%	19%	21%	13%	14%	22%	22%	18%	18%	20%	23%
Somewhat unlikely	6%	7%	8%	4%	4%	6%	4%	7%	5%	4%	4%	5%	12%	8%	6%	3%
Very unlikely	3%	4%	3%	6%	2%	3%	4%	2%	2%	1%	1%	1%	3%	3%	6%	3%
Don't Know	1%	0%	1%	0%	1%	0%	0%	1%	1%	0%	2%	1%	1%	0%	2%	3%

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	Total	Country														
		Italy	Netherlands	France	Spain	Poland	Ireland	Belgium	Germany	Sweden	Romania	Finland	Czech Republic	Greece	Norway	Denmark
Unweighted	2348	146	141	283	146	139	141	137	148	139	141	138	135	279	114	121
Weighted	2348	310	65	289	182	246	22	45	719	50	162	31	92	84	21	29

In the last year, AI tools that are used to generate text, images or video (“Generative AI”) have become much more prominent. Examples of text based generative AI tools include Google Gemini, ChatGPT, and Bing Chat, while image

BASE: All Respondents

Very familiar	32%	30%	22%	30%	31%	23%	31%	23%	40%	33%	31%	15%	23%	25%	32%	47%
Somewhat familiar	43%	46%	51%	40%	38%	52%	48%	40%	39%	45%	42%	49%	43%	43%	53%	31%
Neither familiar or unfamiliar	14%	14%	14%	19%	18%	17%	5%	24%	9%	9%	13%	20%	12%	15%	5%	12%
Somewhat unfamiliar	7%	7%	4%	8%	11%	6%	8%	5%	4%	7%	11%	9%	11%	8%	3%	3%
Very unfamiliar	5%	3%	8%	2%	2%	1%	7%	7%	6%	4%	2%	5%	9%	8%	6%	8%
Don't Know	1%	0%	1%	0%	0%	1%	0%	1%	1%	2%	1%	3%	1%	1%	0%	0%

Generative AI refers specifically to AI tools that generate new, realistic content (e.g. images, text, or video). This includes tools such as Chat GPT or Google Gemini. How likely do you think it is that generative AI will significantly impact your business in the next 12 months?

BASE: All Respondents

Very likely	30%	29%	22%	29%	32%	25%	28%	17%	36%	31%	37%	22%	17%	26%	29%	36%
Somewhat likely	41%	42%	39%	40%	45%	47%	39%	45%	39%	40%	34%	41%	43%	35%	47%	36%
Neither likely or unlikely	15%	15%	17%	18%	13%	13%	16%	21%	12%	16%	18%	15%	19%	23%	13%	12%
Somewhat unlikely	6%	6%	11%	5%	3%	10%	7%	6%	3%	3%	5%	11%	7%	11%	5%	4%
Very unlikely	7%	5%	10%	6%	7%	4%	9%	10%	9%	8%	6%	10%	12%	3%	4%	11%
Don't Know	1%	2%	0%	1%	0%	1%	1%	1%	1%	2%	1%	2%	2%	3%	2%	1%

In your view, has generative AI significantly improved the productivity of your business in the last year?

BASE: All Respondents

Generative AI has significantly improved	29%	31%	18%	25%	26%	27%	21%	24%	34%	31%	25%	20%	16%	22%	37%	41%
Generative AI has improved	43%	45%	44%	45%	48%	42%	40%	43%	42%	43%	44%	38%	47%	36%	38%	33%
Generative AI has not had an impact	21%	19%	28%	23%	23%	24%	30%	25%	18%	22%	19%	29%	23%	32%	19%	20%
Generative AI has worsened	1%	1%	2%	2%	1%	1%	1%	3%	1%	1%	0%	1%	3%	1%	2%	3%
Don't Know	6%	4%	7%	5%	2%	6%	8%	5%	6%	3%	11%	12%	11%	10%	3%	3%

Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: Generative AI to come up with new ideas or suggestions

BASE: All Respondents

We have regularly used it	29%	37%	26%	28%	37%	25%	28%	23%	30%	33%	27%	19%	22%	24%	24%	25%
We have occasionally used it	35%	34%	34%	34%	34%	38%	36%	37%	36%	33%	31%	34%	33%	30%	40%	37%
We have used AI for this purpose	14%	11%	11%	14%	13%	16%	10%	18%	14%	14%	15%	22%	14%	15%	17%	17%
We have not used AI for this purpose	20%	16%	23%	23%	15%	20%	22%	17%	19%	16%	24%	18%	29%	29%	19%	18%
Don't Know	2%	2%	6%	2%	1%	2%	3%	5%	1%	5%	3%	7%	2%	3%	0%	2%

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	Country															
	Total	Italy	Netherlands	France	Spain	Poland	Ireland	Belgium	Germany	Sweden	Romania	Finland	Czech Republic	Greece	Norway	Denmark
Unweighted	2348	146	141	283	146	139	141	137	148	139	141	138	135	279	114	121
Weighted	2348	310	65	289	182	246	22	45	719	50	162	31	92	84	21	29

Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: To help with internet research

BASE: All Respondents

We have regularly used /	36%	42%	28%	35%	44%	39%	39%	31%	35%	30%	34%	27%	27%	39%	25%	33%
We have occasionally used /	35%	31%	31%	33%	31%	33%	31%	34%	42%	37%	32%	39%	32%	34%	34%	34%
We have used AI for this	13%	14%	19%	11%	10%	16%	11%	15%	11%	17%	14%	15%	17%	13%	19%	14%
We have not used AI for	14%	12%	21%	18%	14%	11%	17%	14%	12%	11%	18%	13%	23%	13%	20%	16%
Don't Know	2%	2%	2%	3%	2%	1%	2%	6%	1%	5%	3%	6%	1%	1%	2%	3%

Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: To draft documents or reports

BASE: All Respondents

We have regularly used /	34%	37%	23%	34%	41%	28%	31%	30%	36%	29%	37%	26%	23%	33%	31%	31%
We have occasionally used /	34%	36%	40%	33%	32%	41%	34%	36%	35%	35%	28%	33%	27%	28%	32%	37%
We have used AI for this	14%	12%	14%	15%	12%	15%	13%	11%	12%	20%	18%	20%	24%	16%	19%	13%
We have not used AI for	15%	14%	21%	17%	13%	15%	21%	15%	15%	15%	13%	12%	25%	20%	17%	17%
Don't Know	2%	2%	3%	1%	2%	1%	2%	9%	2%	2%	4%	9%	2%	3%	1%	2%

Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: To summarise long documents or information

BASE: All Respondents

We have regularly used /	37%	40%	30%	36%	42%	37%	34%	31%	39%	37%	35%	24%	29%	32%	30%	31%
We have occasionally used /	33%	32%	29%	33%	38%	36%	31%	36%	34%	31%	30%	35%	26%	27%	30%	40%
We have used AI for this	11%	11%	18%	12%	5%	12%	14%	18%	10%	14%	11%	18%	17%	14%	22%	11%
We have not used AI for	17%	15%	22%	18%	14%	13%	20%	12%	16%	16%	22%	17%	27%	26%	19%	16%
Don't Know	1%	1%	0%	1%	1%	2%	1%	2%	1%	2%	2%	7%	1%	1%	0%	2%

Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: Generative AI to produce original images or art for your business to use

BASE: All Respondents

We have regularly used /	28%	30%	20%	25%	27%	21%	26%	17%	33%	27%	29%	17%	26%	25%	20%	20%
We have occasionally used /	31%	39%	33%	23%	40%	28%	23%	36%	30%	36%	27%	36%	26%	20%	33%	41%
We have used AI for this	15%	8%	14%	13%	10%	21%	15%	20%	17%	15%	17%	11%	15%	19%	17%	13%
We have not used AI for	25%	18%	30%	36%	21%	29%	33%	21%	20%	21%	25%	28%	31%	34%	28%	23%
Don't Know	2%	4%	4%	3%	2%	1%	3%	6%	1%	0%	3%	8%	2%	3%	2%	1%

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	Country															
	Total	Italy	Netherlands	France	Spain	Poland	Ireland	Belgium	Germany	Sweden	Romania	Finland	Czech Republic	Greece	Norway	Denmark
Unweighted	2348	146	141	283	146	139	141	137	148	139	141	138	135	279	114	121
Weighted	2348	310	65	289	182	246	22	45	719	50	162	31	92	84	21	29

Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: To analyse data

BASE: All Respondents

We have regularly used /	40%	40%	26%	38%	45%	42%	39%	33%	43%	36%	40%	25%	33%	35%	30%	37%
We have occasionally used /	31%	31%	37%	31%	29%	32%	28%	31%	32%	32%	26%	37%	25%	24%	32%	36%
We have used AI for this	11%	10%	13%	13%	8%	10%	10%	15%	9%	15%	15%	9%	16%	15%	21%	8%
We have not used AI for	17%	17%	22%	17%	16%	14%	22%	16%	16%	16%	17%	21%	22%	25%	15%	17%
Don't Know	1%	3%	3%	1%	2%	1%	1%	5%	0%	2%	2%	7%	3%	1%	2%	2%

Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: To train more junior members of staff

BASE: All Respondents

We have regularly used /	25%	26%	12%	23%	34%	23%	20%	15%	28%	20%	24%	15%	17%	24%	20%	28%
We have occasionally used /	29%	31%	30%	33%	28%	26%	27%	34%	28%	35%	31%	24%	23%	19%	34%	30%
We have used AI for this	14%	14%	16%	10%	9%	20%	11%	17%	13%	11%	12%	18%	19%	16%	17%	12%
We have not used AI for	31%	28%	40%	32%	28%	30%	38%	30%	31%	33%	31%	33%	41%	36%	27%	29%
Don't Know	2%	2%	2%	2%	1%	0%	4%	3%	1%	2%	3%	9%	1%	5%	2%	1%

Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: To automate social media posts and/or ad campaigns

BASE: All Respondents

We have regularly used /	26%	32%	19%	30%	32%	28%	21%	13%	20%	25%	29%	20%	22%	24%	23%	31%
We have occasionally used /	31%	28%	36%	30%	34%	32%	32%	39%	33%	28%	21%	29%	20%	28%	35%	31%
We have used AI for this	14%	12%	11%	10%	10%	16%	10%	19%	17%	16%	16%	12%	18%	13%	13%	15%
We have not used AI for	27%	24%	30%	27%	22%	25%	34%	23%	28%	28%	31%	29%	38%	33%	29%	22%
Don't Know	2%	3%	4%	3%	1%	0%	3%	6%	2%	2%	3%	9%	2%	1%	0%	1%

Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: To improve cyber security/ threat detection

BASE: All Respondents

We have regularly used /	31%	28%	18%	28%	37%	30%	30%	20%	36%	27%	29%	18%	20%	25%	26%	32%
We have occasionally used /	30%	33%	33%	32%	30%	32%	27%	29%	32%	34%	19%	31%	22%	21%	24%	35%
We have used AI for this	12%	8%	11%	12%	9%	16%	13%	18%	9%	12%	16%	18%	18%	16%	24%	10%
We have not used AI for	26%	29%	33%	25%	23%	22%	27%	29%	22%	24%	33%	25%	37%	33%	22%	21%
Don't Know	2%	2%	4%	3%	2%	1%	4%	4%	1%	2%	3%	8%	2%	6%	3%	2%

Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: Improve or streamline operational processes

BASE: All Respondents

We have regularly used /	30%	33%	19%	29%	42%	27%	22%	25%	31%	31%	29%	29%	26%	26%	24%	24%
We have occasionally used /	33%	37%	33%	34%	28%	36%	39%	35%	33%	40%	29%	31%	31%	29%	32%	40%
We have used AI for this	12%	8%	18%	14%	11%	16%	10%	15%	12%	7%	12%	12%	14%	13%	21%	12%
We have not used AI for	22%	21%	29%	22%	18%	18%	27%	20%	23%	19%	27%	20%	27%	28%	22%	23%
Don't Know	2%	1%	1%	2%	2%	2%	2%	5%	2%	3%	2%	8%	2%	4%	0%	1%

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	Country															
	Total	Italy	Netherlands	France	Spain	Poland	Ireland	Belgium	Germany	Sweden	Romania	Finland	Czech Republic	Greece	Norway	Denmark
Unweighted	2348	146	141	283	146	139	141	137	148	139	141	138	135	279	114	121
Weighted	2348	310	65	289	182	246	22	45	719	50	162	31	92	84	21	29

Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: To recognise images or reverse image search

BASE: All Respondents

We have regularly used /	26%	30%	21%	25%	28%	25%	21%	19%	25%	25%	30%	20%	23%	25%	24%	25%
We have occasionally used /	34%	33%	31%	29%	39%	37%	29%	41%	39%	35%	24%	33%	29%	30%	29%	39%
We have used AI for this	14%	15%	21%	13%	10%	15%	17%	13%	12%	17%	18%	18%	20%	15%	19%	14%
We have not used AI for	24%	20%	25%	31%	22%	21%	31%	23%	23%	21%	22%	22%	26%	29%	28%	19%
Don't Know	2%	1%	3%	1%	2%	2%	3%	4%	1%	2%	5%	7%	1%	2%	1%	3%

Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: To help with programming or coding

BASE: All Respondents

We have regularly used /	27%	32%	21%	23%	23%	25%	30%	19%	29%	30%	32%	21%	23%	23%	23%	26%
We have occasionally used /	32%	31%	31%	32%	39%	30%	29%	33%	34%	29%	24%	34%	27%	25%	35%	33%
We have used AI for this	13%	9%	10%	12%	9%	21%	9%	19%	13%	17%	14%	12%	14%	19%	20%	13%
We have not used AI for	25%	26%	33%	30%	25%	21%	29%	22%	22%	22%	28%	26%	34%	29%	20%	26%
Don't Know	3%	3%	5%	4%	3%	2%	3%	6%	2%	3%	2%	7%	3%	4%	2%	1%

Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: To translate documents or information

BASE: All Respondents

We have regularly used /	36%	39%	29%	32%	43%	38%	32%	27%	36%	27%	41%	18%	32%	34%	28%	30%
We have occasionally used /	33%	29%	31%	39%	30%	34%	33%	34%	35%	40%	28%	44%	30%	33%	30%	35%
We have used AI for this	12%	10%	16%	10%	12%	15%	11%	18%	10%	16%	12%	17%	14%	12%	22%	14%
We have not used AI for	17%	19%	22%	18%	14%	13%	22%	16%	16%	14%	19%	15%	22%	19%	18%	18%
Don't Know	2%	2%	2%	2%	2%	0%	2%	5%	2%	4%	1%	6%	1%	3%	2%	3%

Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: To transcribe speech or recordings

BASE: All Respondents

We have regularly used /	26%	33%	15%	25%	32%	24%	29%	24%	23%	25%	30%	17%	24%	20%	23%	34%
We have occasionally used /	33%	35%	35%	34%	35%	28%	25%	34%	39%	31%	21%	25%	27%	19%	38%	28%
We have used AI for this	15%	9%	16%	17%	7%	21%	15%	14%	15%	19%	17%	22%	12%	11%	13%	14%
We have not used AI for	25%	22%	31%	22%	24%	26%	28%	24%	21%	23%	31%	31%	35%	47%	27%	22%
Don't Know	2%	1%	3%	2%	2%	2%	2%	4%	1%	3%	2%	5%	2%	4%	0%	2%

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	Country															
	Total	Italy	Netherlands	France	Spain	Poland	Ireland	Belgium	Germany	Sweden	Romania	Finland	Czech Republic	Greece	Norway	Denmark
Unweighted	2348	146	141	283	146	139	141	137	148	139	141	138	135	279	114	121
Weighted	2348	310	65	289	182	246	22	45	719	50	162	31	92	84	21	29

Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: To retrieve or analyse information from your company's existing data

BASE: All Respondents

We have regularly used /	32%	35%	24%	29%	40%	35%	30%	16%	33%	31%	34%	20%	24%	30%	27%	30%
We have occasionally used /	35%	34%	35%	37%	30%	31%	38%	48%	38%	39%	30%	34%	33%	25%	35%	35%
We have used AI for this	11%	10%	13%	10%	13%	10%	9%	14%	10%	8%	12%	12%	14%	17%	22%	12%
We have not used AI for	20%	19%	24%	23%	14%	22%	21%	19%	17%	20%	23%	27%	27%	27%	14%	21%
Don't Know	2%	1%	4%	1%	4%	1%	2%	4%	1%	2%	1%	6%	1%	1%	2%	1%

Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: To develop or prototype entirely new product features or services

BASE: All Respondents

We have regularly used /	27%	29%	17%	26%	33%	23%	25%	15%	31%	22%	26%	17%	16%	20%	22%	20%
We have occasionally used /	31%	30%	35%	31%	29%	36%	27%	36%	30%	38%	22%	33%	27%	27%	31%	39%
We have used AI for this	13%	9%	11%	13%	15%	14%	11%	17%	13%	17%	14%	17%	11%	17%	19%	16%
We have not used AI for	28%	29%	33%	28%	21%	26%	34%	28%	25%	21%	36%	26%	42%	34%	24%	22%
Don't Know	2%	3%	4%	3%	2%	1%	3%	4%	1%	2%	3%	7%	4%	3%	3%	3%

Below are some ways that AI can be used by businesses. Which of the following, if any, have you personally used AI for in your business?: To automate decision-making for complex financial or operational tasks (e.g., dynamic pricing)

BASE: All Respondents

We have regularly used /	26%	24%	20%	26%	27%	30%	23%	15%	29%	22%	28%	22%	19%	22%	20%	33%
We have occasionally used /	30%	30%	30%	30%	32%	34%	29%	34%	33%	32%	24%	25%	23%	27%	29%	28%
We have used AI for this	14%	16%	12%	13%	14%	15%	14%	17%	12%	17%	11%	16%	17%	10%	24%	13%
We have not used AI for	28%	29%	34%	29%	25%	20%	32%	28%	25%	25%	35%	30%	40%	40%	25%	25%
Don't Know	2%	2%	4%	2%	2%	1%	2%	6%	2%	3%	3%	7%	1%	1%	2%	1%

Which, if any, of the following best explains your experience with generative AI so far?

BASE: All Respondents

Generative AI tools are a	32%	32%	19%	24%	31%	35%	28%	19%	38%	34%	30%	19%	23%	26%	43%	32%
Generative AI tools might	44%	47%	47%	47%	45%	45%	41%	47%	42%	44%	41%	46%	41%	43%	39%	41%
Generative AI tools do not	12%	10%	17%	14%	13%	13%	18%	19%	9%	11%	13%	18%	15%	16%	9%	9%
Generative AI tools will r	6%	4%	10%	9%	4%	3%	7%	8%	6%	6%	7%	7%	12%	4%	6%	7%
None of the above	5%	5%	7%	5%	5%	2%	4%	4%	4%	4%	7%	4%	5%	8%	1%	9%
Don't Know	2%	2%	1%	2%	2%	2%	1%	3%	1%	1%	2%	7%	4%	3%	2%	2%

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	Country															
	Total	Italy	Netherlands	France	Spain	Poland	Ireland	Belgium	Germany	Sweden	Romania	Finland	Czech Republic	Greece	Norway	Denmark
Unweighted	2348	146	141	283	146	139	141	137	148	139	141	138	135	279	114	121
Weighted	2348	310	65	289	182	246	22	45	719	50	162	31	92	84	21	29

You said that you have already used AI in some way in your business. Would you say your business using AI has had any of the following impacts?: Improved the productivity of our staff

BASE: Uses AI

Has had this impact	47%	47%	38%	45%	50%	50%	48%	50%	50%	50%	42%	33%	47%	39%	47%	44%
Too soon to tell either w.	39%	41%	42%	42%	34%	30%	38%	39%	42%	34%	44%	45%	30%	42%	41%	44%
Has not had this impact	12%	9%	19%	11%	16%	18%	15%	10%	8%	14%	14%	18%	21%	17%	9%	9%
Don't Know	1%	3%	1%	2%	0%	1%	0%	1%	0%	1%	0%	4%	2%	2%	3%	2%

You said that you have already used AI in some way in your business. Would you say your business using AI has had any of the following impacts?: Improved the productivity of the business as a whole

BASE: Uses AI

Has had this impact	48%	49%	35%	42%	55%	52%	47%	48%	51%	54%	42%	36%	41%	36%	49%	52%
Too soon to tell either w.	40%	42%	49%	45%	35%	33%	36%	41%	39%	34%	40%	40%	35%	48%	38%	37%
Has not had this impact	12%	7%	15%	12%	9%	14%	16%	7%	9%	12%	17%	21%	22%	15%	12%	11%
Don't Know	1%	2%	1%	1%	0%	0%	1%	4%	1%	0%	2%	3%	2%	1%	1%	1%

You said that you have already used AI in some way in your business. Would you say your business using AI has had any of the following impacts?: Freed up time for members of staff to focus on higher value tasks

BASE: Uses AI

Has had this impact	49%	46%	38%	52%	52%	54%	54%	40%	51%	52%	45%	42%	41%	39%	54%	57%
Too soon to tell either w.	37%	35%	44%	36%	38%	34%	33%	46%	38%	34%	43%	36%	32%	40%	30%	32%
Has not had this impact	12%	15%	18%	11%	9%	10%	14%	11%	11%	12%	11%	17%	24%	19%	15%	11%
Don't Know	1%	4%	0%	1%	1%	2%	0%	2%	0%	2%	2%	5%	2%	2%	1%	1%

You said that you have already used AI in some way in your business. Would you say your business using AI has had any of the following impacts?: Generated new ideas which have been implemented

BASE: Uses AI

Has had this impact	47%	43%	38%	45%	54%	53%	49%	40%	51%	47%	40%	29%	45%	39%	35%	45%
Too soon to tell either w.	37%	41%	42%	38%	34%	32%	35%	41%	37%	39%	38%	47%	28%	40%	46%	40%
Has not had this impact	14%	15%	18%	15%	11%	13%	15%	17%	10%	14%	21%	21%	24%	20%	19%	15%
Don't Know	2%	1%	2%	2%	0%	2%	2%	3%	3%	0%	1%	3%	2%	1%	0%	0%

You said that you have already used AI in some way in your business. Would you say your business using AI has had any of the following impacts?: AI has become an essential part of a product or service we offer

BASE: Uses AI

Has had this impact	43%	47%	34%	36%	42%	40%	43%	35%	53%	47%	33%	36%	41%	31%	41%	38%
Too soon to tell either w.	39%	35%	47%	46%	42%	45%	43%	43%	34%	29%	43%	40%	33%	42%	42%	40%
Has not had this impact	16%	15%	17%	16%	16%	15%	14%	18%	12%	23%	23%	20%	24%	25%	16%	21%
Don't Know	2%	3%	2%	2%	0%	0%	0%	3%	1%	2%	1%	5%	2%	2%	1%	1%

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	Total	Country														
		Italy	Netherlands	France	Spain	Poland	Ireland	Belgium	Germany	Sweden	Romania	Finland	Czech Republic	Greece	Norway	Denmark
Unweighted	2348	146	141	283	146	139	141	137	148	139	141	138	135	279	114	121
Weighted	2348	310	65	289	182	246	22	45	719	50	162	31	92	84	21	29

You said that AI has freed up time for members of staff to focus on higher value tasks. Broadly, how much time in an average week do you think has been saved by AI for an average member of staff in your organisation?

BASE: AI has freed up time

Less than an hour a week	4%	3%	6%	8%	3%	4%	2%	1%	4%	5%	3%	2%	7%	3%	0%	1%
1 - 2 hours a week	22%	17%	27%	23%	23%	19%	30%	33%	23%	16%	32%	22%	17%	16%	18%	16%
3 - 5 hours a week	42%	56%	42%	47%	45%	45%	31%	34%	33%	51%	30%	41%	36%	53%	44%	44%
6 - 10 hours a week	21%	11%	22%	14%	14%	22%	27%	19%	27%	19%	23%	23%	30%	23%	29%	28%
11 - 20 hours a week	6%	5%	0%	3%	7%	7%	3%	4%	9%	7%	5%	9%	7%	3%	4%	8%
More than 20 hours a week	3%	0%	2%	3%	8%	0%	3%	0%	2%	2%	8%	3%	2%	3%	1%	3%
Don't Know	3%	8%	0%	2%	1%	2%	4%	9%	2%	0%	0%	0%	2%	0%	2%	0%

Thinking ahead to the next 5 years, how likely or unlikely do you expect it is that using AI would have the following impacts for your business?: Improve the productivity of our staff

BASE: All Respondents

AI will definitely do this for our business	33%	37%	23%	32%	38%	30%	32%	28%	34%	31%	39%	27%	25%	31%	40%	32%
AI is likely to do this for our business	42%	42%	43%	42%	41%	48%	38%	48%	43%	43%	32%	40%	34%	41%	34%	42%
AI is unlikely to do this for our business	12%	10%	16%	15%	12%	10%	12%	16%	11%	14%	14%	22%	21%	13%	16%	14%
AI will definitely not do this for our business	10%	8%	15%	10%	6%	9%	15%	6%	10%	9%	13%	6%	16%	10%	7%	8%
Don't Know	3%	4%	3%	2%	3%	3%	2%	2%	3%	3%	2%	6%	4%	4%	3%	4%

Thinking ahead to the next 5 years, how likely or unlikely do you expect it is that using AI would have the following impacts for your business?: Improve the productivity of my business as a whole

BASE: All Respondents

AI will definitely do this for my business	38%	42%	22%	35%	45%	38%	37%	30%	41%	35%	38%	26%	30%	30%	30%	36%
AI is likely to do this for my business	38%	38%	47%	44%	35%	35%	35%	40%	37%	43%	33%	40%	34%	45%	40%	36%
AI is unlikely to do this for my business	11%	8%	19%	10%	12%	15%	14%	15%	9%	11%	16%	17%	14%	13%	19%	16%
AI will definitely not do this for my business	9%	9%	10%	10%	5%	8%	12%	11%	9%	8%	11%	9%	16%	6%	7%	8%
Don't Know	3%	3%	2%	1%	3%	4%	1%	4%	4%	3%	2%	7%	5%	7%	5%	4%

Thinking ahead to the next 5 years, how likely or unlikely do you expect it is that using AI would have the following impacts for your business?: Free up time for staff at my business to focus on higher value tasks

BASE: All Respondents

AI will definitely do this for my business	36%	37%	27%	40%	42%	29%	37%	21%	37%	40%	40%	26%	33%	33%	30%	32%
AI is likely to do this for my business	37%	40%	42%	35%	37%	41%	35%	49%	36%	38%	30%	41%	28%	44%	45%	44%
AI is unlikely to do this for my business	13%	9%	16%	12%	15%	18%	15%	16%	12%	9%	18%	20%	15%	10%	18%	13%
AI will definitely not do this for my business	9%	9%	13%	11%	4%	8%	11%	10%	10%	9%	9%	5%	17%	7%	5%	8%
Don't Know	4%	5%	3%	1%	2%	4%	2%	3%	5%	4%	3%	8%	7%	6%	2%	3%

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	Country															
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Unweighted	2348	146	141	283	146	139	141	137	148	139	141	138	135	279	114	121
Weighted	2348	310	65	289	182	246	22	45	719	50	162	31	92	84	21	29

Thinking ahead to the next 5 years, how likely or unlikely do you expect it is that using AI would have the following impacts for your business?: Become an essential part of a product or service that we offer

BASE: All Respondents

AI will definitely do this for	31%	31%	25%	30%	32%	30%	26%	23%	36%	30%	29%	24%	23%	30%	26%	27%
AI is likely to do this for r	39%	41%	35%	40%	42%	45%	44%	39%	36%	41%	36%	34%	33%	38%	44%	31%
AI is unlikely to do this fc	15%	15%	23%	14%	12%	12%	13%	26%	14%	17%	18%	25%	17%	19%	18%	25%
AI will definitely not do t	11%	7%	15%	14%	12%	11%	14%	10%	10%	9%	13%	10%	22%	9%	9%	13%
Don't Know	4%	6%	3%	2%	2%	2%	2%	2%	4%	2%	3%	6%	6%	4%	3%	3%

Thinking ahead to the next 5 years, how likely or unlikely do you expect it is that using AI would have the following impacts for your business?: Reduce the need for human employees

BASE: All Respondents

AI will definitely do this f	21%	19%	16%	17%	18%	17%	20%	11%	26%	18%	19%	19%	28%	16%	24%	29%
AI is likely to do this for r	34%	35%	32%	38%	37%	35%	30%	44%	30%	44%	35%	31%	22%	38%	31%	31%
AI is unlikely to do this fc	23%	27%	32%	21%	20%	27%	24%	29%	17%	24%	26%	31%	26%	29%	26%	22%
AI will definitely not do t	18%	13%	18%	20%	20%	13%	20%	14%	21%	13%	18%	13%	21%	15%	16%	13%
Don't Know	5%	5%	1%	3%	4%	8%	6%	1%	6%	2%	2%	6%	3%	3%	3%	5%

Thinking ahead to the next 5 years, how likely or unlikely do you expect it is that using AI would have the following impacts for your business?: Make our company more profitable

BASE: All Respondents

AI will definitely do this f	31%	34%	23%	32%	40%	30%	26%	23%	29%	40%	28%	31%	26%	28%	28%	29%
AI is likely to do this for r	41%	42%	38%	39%	35%	35%	38%	43%	47%	42%	44%	40%	29%	39%	46%	48%
AI is unlikely to do this fc	15%	14%	20%	14%	15%	22%	20%	22%	11%	6%	16%	17%	20%	19%	15%	13%
AI will definitely not do t	9%	6%	15%	12%	6%	7%	10%	10%	9%	8%	9%	7%	19%	5%	6%	6%
Don't Know	4%	4%	5%	3%	4%	7%	6%	3%	3%	4%	3%	5%	5%	9%	5%	4%

In the future, does your business plan to invest more in generative AI tools?

BASE: All Respondents

Yes, in the next year	32%	31%	20%	30%	32%	23%	26%	23%	42%	24%	27%	16%	23%	17%	35%	32%
Yes, in the next two year	29%	29%	19%	31%	31%	32%	26%	32%	28%	37%	26%	28%	21%	28%	34%	23%
Yes, in the next five year:	17%	20%	28%	17%	18%	20%	18%	15%	11%	13%	16%	21%	20%	25%	9%	18%
Yes, in the next ten years	6%	5%	8%	4%	2%	9%	8%	9%	4%	6%	12%	7%	5%	7%	6%	9%
Yes, but not in the next t	2%	1%	3%	2%	3%	3%	0%	6%	1%	3%	2%	5%	3%	5%	1%	0%
No, we do not plan to in	12%	8%	15%	13%	8%	10%	18%	12%	13%	15%	16%	15%	22%	11%	10%	17%
Don't know	3%	6%	7%	3%	5%	3%	3%	3%	1%	3%	2%	9%	5%	7%	4%	2%

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Do you currently have a formal, documented strategy for the deployment and governance of AI in your business?

BASE: All Respondents

Yes, fully defined and do	37%	30%	24%	37%	39%	39%	31%	23%	47%	39%	31%	26%	25%	23%	45%	50%
No, but one is in develop.	36%	41%	40%	36%	38%	38%	33%	47%	29%	38%	41%	42%	33%	46%	34%	24%
No, and we are not curre	24%	23%	32%	25%	21%	21%	31%	25%	22%	20%	26%	23%	39%	24%	18%	25%
Don't know	3%	6%	4%	2%	2%	2%	4%	4%	2%	2%	2%	9%	4%	6%	3%	1%

What is the approximate budget your business is allocating specifically to AI tools and infrastructure (excluding general IT) over the next year?

BASE: Currency based

Under €5,000	17%	18%	18%	16%	18%	0%	18%	20%	15%	0%	0%	15%	0%	23%	0%	0%
€5,000 to €24,999	16%	20%	18%	15%	20%	0%	19%	19%	12%	0%	0%	17%	0%	22%	0%	0%
€25,000 to €49,999	21%	22%	22%	24%	23%	0%	9%	27%	18%	0%	0%	26%	0%	18%	0%	0%
€50,000 to €99,999	19%	16%	20%	14%	14%	0%	29%	17%	24%	0%	0%	20%	0%	12%	0%	0%
€100,000 or more	17%	10%	10%	19%	13%	0%	12%	5%	23%	0%	0%	11%	0%	9%	0%	0%
Don't know	11%	14%	11%	12%	12%	0%	13%	12%	8%	0%	0%	11%	0%	17%	0%	0%

What is the approximate budget your business is allocating specifically to AI tools and infrastructure (excluding general IT) over the next year?

BASE: Currency based

Under zł 12,000	14%	0%	0%	0%	0%	14%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
zł 12,000 to 60,000	22%	0%	0%	0%	0%	22%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
zł 60,000 to 120,000	19%	0%	0%	0%	0%	19%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
zł 120,000 to 240,000	20%	0%	0%	0%	0%	20%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
zł 240,000 or more	14%	0%	0%	0%	0%	14%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't know	11%	0%	0%	0%	0%	11%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

What is the approximate budget your business is allocating specifically to AI tools and infrastructure (excluding general IT) over the next year?

BASE: Currency based

Under kr 48,000	15%	0%	0%	0%	0%	0%	0%	0%	0%	15%	0%	0%	0%	0%	0%	0%
kr 48,000 to 240,000	17%	0%	0%	0%	0%	0%	0%	0%	0%	17%	0%	0%	0%	0%	0%	0%
kr 240,000 to 480,000	26%	0%	0%	0%	0%	0%	0%	0%	0%	26%	0%	0%	0%	0%	0%	0%
kr 480,000 to 960,000	16%	0%	0%	0%	0%	0%	0%	0%	0%	16%	0%	0%	0%	0%	0%	0%
kr 960,000 or more	17%	0%	0%	0%	0%	0%	0%	0%	0%	17%	0%	0%	0%	0%	0%	0%
Don't know	9%	0%	0%	0%	0%	0%	0%	0%	0%	9%	0%	0%	0%	0%	0%	0%

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What is the approximate budget your business is allocating specifically to AI tools and infrastructure (excluding general IT) over the next year?

BASE: Currency based

Under kr 50,000	15%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	15%	0%
kr 50,000 to 250,000	10%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	10%	0%
kr 250,000 to 500,000	24%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	24%	0%
kr 500,000 to 1,000,000	31%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	31%	0%
kr 1,000,000 or more	14%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	14%	0%
Don't know	5%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	5%	0%

What is the approximate budget your business is allocating specifically to AI tools and infrastructure (excluding general IT) over the next year?

BASE: Currency based

Under Kč 85,000	28%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	28%	0%	0%	0%
Kč 85,000 to 425,000	25%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	25%	0%	0%	0%
Kč 425,000 to 850,000	16%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	16%	0%	0%	0%
Kč 850,000 to 1,700,000	6%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	6%	0%	0%	0%
Kč 1,700,000 or more	11%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	11%	0%	0%	0%
Don't know	15%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	15%	0%	0%	0%

What is the approximate budget your business is allocating specifically to AI tools and infrastructure (excluding general IT) over the next year?

BASE: Currency based

Under lei 14,000	25%	0%	0%	0%	0%	0%	0%	0%	0%	0%	25%	0%	0%	0%	0%	0%
lei 14,000 to 67,500	22%	0%	0%	0%	0%	0%	0%	0%	0%	0%	22%	0%	0%	0%	0%	0%
lei 67,500 to 135,000	14%	0%	0%	0%	0%	0%	0%	0%	0%	0%	14%	0%	0%	0%	0%	0%
lei 135,000 to 270,000	7%	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	0%	0%	0%	0%	0%
lei 270,000 or more	18%	0%	0%	0%	0%	0%	0%	0%	0%	0%	18%	0%	0%	0%	0%	0%
Don't know	15%	0%	0%	0%	0%	0%	0%	0%	0%	0%	15%	0%	0%	0%	0%	0%

What is the approximate budget your business is allocating specifically to AI tools and infrastructure (excluding general IT) over the next year?

BASE: Currency based

Under 32 500 kr	17%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	17%
32 500–160 000 kr	15%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	15%
160 000–325 000 kr	21%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	21%
325 000–650 000 kr	25%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	25%
650 000 kr eller derover	14%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	14%
Ved ikke	7%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%

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Which of the following describes your business's approach to the current AI transition?

BASE: All Respondents

We aim to be a market leader	21%	22%	18%	19%	26%	25%	18%	17%	23%	23%	12%	16%	12%	13%	25%	28%
We are actively integrating AI	34%	34%	29%	36%	30%	35%	25%	27%	34%	32%	36%	33%	33%	30%	37%	26%
We are waiting for AI technology	25%	25%	24%	23%	25%	21%	29%	30%	25%	28%	31%	27%	21%	37%	20%	25%
We do not see AI as relevant	17%	14%	26%	20%	13%	18%	21%	22%	17%	14%	17%	17%	29%	13%	15%	17%
Don't know	3%	5%	3%	2%	6%	1%	6%	4%	2%	3%	4%	7%	5%	8%	3%	3%

In general, how often would you say you personally ask a Generative AI language model (such as Google Gemini, ChatGPT) a question related to your work?

BASE: All Respondents

Never	10%	8%	16%	11%	8%	6%	10%	8%	12%	8%	8%	7%	14%	8%	9%	12%
Less than once a month	10%	9%	16%	11%	11%	12%	13%	11%	8%	4%	15%	7%	17%	9%	7%	4%
Around once a month	8%	10%	9%	9%	6%	12%	9%	15%	5%	9%	7%	12%	6%	11%	5%	3%
A few times a month	12%	15%	14%	11%	13%	13%	14%	9%	10%	15%	16%	13%	15%	11%	15%	10%
Around once a week	9%	7%	10%	13%	10%	5%	7%	10%	10%	12%	2%	14%	8%	12%	3%	13%
A few times a week	16%	14%	12%	14%	17%	20%	10%	21%	14%	18%	21%	13%	19%	16%	19%	20%
Around once a day	8%	9%	8%	8%	8%	8%	10%	6%	9%	5%	8%	11%	7%	9%	10%	7%
2 - 5 times a day	13%	12%	11%	13%	10%	11%	11%	16%	15%	15%	12%	8%	6%	12%	20%	15%
6 - 10 times a day	7%	7%	2%	4%	10%	5%	10%	1%	11%	7%	1%	8%	4%	5%	8%	11%
Over 10 times a day	5%	5%	2%	3%	6%	8%	5%	1%	7%	4%	7%	4%	4%	2%	3%	3%
Don't Know	2%	3%	1%	2%	2%	1%	1%	2%	0%	3%	3%	2%	2%	4%	0%	2%

To what extent do you agree or disagree with the following?: Keeping up with developments in AI will be important for my business to remain competitive

BASE: All Respondents

Strongly agree	42%	48%	29%	35%	41%	42%	33%	25%	48%	41%	42%	26%	31%	30%	39%	33%
Somewhat agree	30%	22%	35%	39%	35%	30%	35%	36%	26%	31%	29%	42%	30%	36%	29%	37%
Neither agree nor disagree	15%	16%	17%	12%	13%	13%	14%	28%	13%	11%	18%	14%	22%	23%	19%	14%
Somewhat disagree	5%	7%	7%	7%	7%	5%	8%	5%	4%	6%	3%	9%	6%	4%	3%	4%
Strongly disagree	7%	5%	11%	7%	2%	9%	10%	4%	9%	8%	5%	7%	6%	5%	9%	12%
Don't Know	1%	2%	1%	1%	2%	1%	1%	2%	0%	2%	2%	2%	4%	2%	1%	1%

To what extent do you agree or disagree with the following?: Having access to the latest AI technology is important for my business to remain competitive

BASE: All Respondents

Strongly agree	40%	43%	20%	36%	44%	46%	32%	20%	44%	40%	39%	24%	32%	28%	30%	35%
Somewhat agree	30%	23%	38%	34%	31%	25%	34%	47%	29%	26%	30%	39%	25%	34%	35%	37%
Neither agree nor disagree	16%	19%	20%	17%	14%	10%	17%	18%	15%	14%	19%	22%	18%	22%	17%	12%
Somewhat disagree	6%	9%	11%	5%	6%	10%	6%	8%	4%	8%	4%	8%	10%	7%	8%	2%
Strongly disagree	7%	5%	11%	8%	4%	8%	11%	6%	7%	11%	5%	7%	11%	6%	9%	13%
Don't Know	1%	1%	1%	1%	1%	1%	1%	1%	1%	2%	2%	1%	4%	2%	1%	1%

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Weighted	2348	310	65	289	182	246	22	45	719	50	162	31	92	84	21	29

To what extent do you agree or disagree with the following?: My business is committed to quickly adopting AI applications once they are proven to work

BASE: All Respondents

Strongly agree	35%	45%	26%	32%	38%	33%	36%	18%	38%	31%	35%	28%	19%	23%	33%	32%
Somewhat agree	34%	21%	34%	41%	39%	34%	26%	43%	35%	36%	32%	33%	33%	40%	30%	32%
Neither agree nor disagree	17%	21%	19%	14%	13%	16%	20%	22%	14%	12%	21%	18%	25%	22%	17%	16%
Somewhat disagree	5%	4%	9%	4%	3%	6%	6%	11%	5%	10%	4%	8%	5%	5%	7%	6%
Strongly disagree	7%	6%	9%	8%	5%	9%	11%	5%	7%	7%	6%	10%	13%	6%	11%	13%
Don't Know	2%	2%	2%	1%	2%	3%	1%	2%	1%	3%	2%	3%	5%	4%	1%	2%

Which of the following would you say is a more important reason why your business does not use more AI tools?

BASE: All Respondents

We do not know of any c	43%	41%	46%	50%	24%	41%	41%	39%	46%	39%	48%	27%	40%	42%	35%	51%
While they might be use	45%	46%	46%	38%	63%	46%	51%	45%	42%	50%	42%	51%	44%	48%	59%	42%
Don't Know	12%	12%	8%	11%	12%	13%	8%	16%	12%	11%	10%	22%	16%	10%	6%	7%

Which of the following, if any, are barriers to your business making more use of AI?: Cost of AI tools

BASE: All Respondents

This is a significant barrier	14%	8%	18%	18%	15%	13%	18%	16%	12%	14%	22%	11%	14%	21%	22%	23%
This is a barrier	30%	33%	32%	28%	30%	28%	35%	33%	29%	25%	35%	30%	31%	34%	22%	32%
This is not much of a barrier	33%	34%	32%	33%	34%	34%	25%	34%	34%	38%	22%	34%	31%	26%	38%	30%
This is not a barrier at all	20%	21%	14%	18%	18%	24%	19%	14%	23%	15%	13%	15%	17%	14%	15%	13%
Don't Know	3%	5%	4%	2%	4%	1%	3%	4%	2%	8%	7%	9%	8%	5%	3%	2%

Which of the following, if any, are barriers to your business making more use of AI?: Concerns about the security of AI tools

BASE: All Respondents

This is a significant barrier	17%	12%	16%	25%	19%	13%	24%	17%	16%	15%	20%	14%	15%	15%	27%	25%
This is a barrier	31%	26%	29%	28%	36%	33%	40%	29%	32%	32%	32%	30%	31%	41%	31%	34%
This is not much of a barrier	28%	36%	33%	28%	26%	31%	20%	39%	25%	34%	24%	34%	27%	23%	26%	24%
This is not a barrier at all	20%	22%	18%	17%	15%	21%	12%	9%	25%	14%	16%	13%	16%	15%	14%	15%
Don't Know	3%	4%	5%	2%	3%	1%	3%	6%	1%	6%	9%	9%	11%	6%	2%	1%

Which of the following, if any, are barriers to your business making more use of AI?: Concerns about the quality of AI outputs

BASE: All Respondents

This is a significant barrier	15%	10%	12%	17%	18%	10%	20%	15%	17%	18%	18%	15%	11%	17%	12%	25%
This is a barrier	31%	30%	36%	38%	32%	32%	37%	30%	28%	35%	31%	28%	33%	37%	43%	30%
This is not much of a barrier	28%	38%	31%	23%	30%	29%	26%	37%	25%	25%	26%	29%	27%	25%	38%	22%
This is not a barrier at all	22%	20%	18%	20%	17%	28%	15%	10%	27%	18%	17%	18%	20%	17%	7%	19%
Don't Know	3%	3%	2%	2%	3%	1%	2%	9%	2%	5%	9%	10%	9%	4%	1%	3%

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	Country															
	Total	Italy	Netherlands	France	Spain	Poland	Ireland	Belgium	Germany	Sweden	Romania	Finland	Czech Republic	Greece	Norway	Denmark
Unweighted	2348	146	141	283	146	139	141	137	148	139	141	138	135	279	114	121
Weighted	2348	310	65	289	182	246	22	45	719	50	162	31	92	84	21	29

Which of the following, if any, are barriers to your business making more use of AI?: Concerns about the reliability of AI tools

BASE: All Respondents

This is a significant barrier	17%	12%	16%	17%	20%	13%	23%	12%	18%	16%	16%	13%	15%	18%	20%	28%
This is a barrier	28%	24%	30%	35%	28%	30%	32%	35%	25%	33%	30%	32%	23%	33%	36%	33%
This is not much of a barrier	31%	34%	33%	28%	27%	37%	27%	37%	30%	26%	35%	33%	32%	28%	29%	28%
This is not a barrier at all	21%	26%	17%	19%	22%	18%	16%	10%	25%	19%	11%	14%	20%	17%	14%	10%
Don't Know	3%	4%	5%	2%	3%	1%	2%	6%	2%	6%	8%	9%	10%	5%	1%	1%

Which of the following, if any, are barriers to your business making more use of AI?: AI is not transparent enough in how it works

BASE: All Respondents

This is a significant barrier	14%	10%	12%	21%	13%	8%	17%	13%	16%	11%	16%	10%	11%	10%	9%	14%
This is a barrier	26%	24%	31%	26%	32%	27%	31%	34%	22%	29%	28%	25%	26%	35%	39%	37%
This is not much of a barrier	35%	41%	32%	31%	31%	38%	31%	32%	36%	32%	30%	33%	34%	31%	35%	32%
This is not a barrier at all	21%	22%	21%	19%	21%	24%	16%	13%	24%	21%	15%	22%	18%	16%	14%	15%
Don't Know	4%	3%	4%	3%	3%	3%	5%	7%	2%	6%	11%	10%	10%	8%	3%	1%

Which of the following, if any, are barriers to your business making more use of AI?: Concerns about legal requirements and liabilities of using AI

BASE: All Respondents

This is a significant barrier	15%	13%	13%	19%	15%	15%	21%	12%	15%	15%	10%	10%	12%	16%	23%	24%
This is a barrier	32%	29%	33%	31%	33%	32%	34%	40%	32%	37%	33%	23%	25%	32%	22%	36%
This is not much of a barrier	30%	31%	34%	29%	30%	26%	25%	32%	31%	24%	31%	42%	36%	28%	37%	27%
This is not a barrier at all	19%	23%	17%	18%	19%	26%	16%	13%	19%	17%	17%	14%	15%	18%	14%	12%
Don't Know	4%	4%	3%	3%	3%	1%	3%	3%	2%	6%	9%	11%	12%	7%	3%	1%

Which of the following, if any, are barriers to your business making more use of AI?: Concerns about current or future regulation of AI

BASE: All Respondents

This is a significant barrier	15%	10%	11%	17%	15%	15%	27%	13%	17%	16%	12%	9%	12%	7%	19%	25%
This is a barrier	31%	35%	36%	30%	41%	35%	28%	36%	26%	33%	30%	27%	25%	35%	36%	28%
This is not much of a barrier	32%	31%	37%	33%	23%	30%	22%	39%	33%	23%	31%	37%	35%	34%	28%	31%
This is not a barrier at all	18%	18%	14%	17%	17%	18%	19%	10%	20%	21%	19%	17%	18%	17%	16%	13%
Don't Know	4%	5%	2%	3%	4%	2%	4%	3%	3%	8%	8%	9%	10%	7%	2%	2%

Which of the following, if any, are barriers to your business making more use of AI?: I do not know where to start

BASE: All Respondents

This is a significant barrier	6%	4%	5%	7%	8%	6%	13%	12%	4%	9%	7%	7%	10%	7%	10%	15%
This is a barrier	17%	14%	26%	19%	20%	17%	23%	25%	13%	13%	16%	21%	18%	21%	37%	27%
This is not much of a barrier	30%	27%	31%	34%	35%	28%	23%	29%	32%	33%	28%	24%	26%	29%	29%	24%
This is not a barrier at all	41%	49%	34%	38%	34%	43%	35%	27%	46%	39%	40%	35%	34%	37%	22%	29%
Don't Know	6%	6%	5%	2%	4%	6%	5%	7%	6%	6%	10%	14%	12%	6%	3%	5%

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	Country															
	Total	Italy	Netherlands	France	Spain	Poland	Ireland	Belgium	Germany	Sweden	Romania	Finland	Czech Republic	Greece	Norway	Denmark
Unweighted	2348	146	141	283	146	139	141	137	148	139	141	138	135	279	114	121
Weighted	2348	310	65	289	182	246	22	45	719	50	162	31	92	84	21	29

Which of the following, if any, are barriers to your business making more use of AI?: Worry about the dangers of AI advancement in general

BASE: All Respondents

This is a significant barrier	13%	10%	7%	19%	11%	9%	19%	11%	15%	14%	11%	5%	12%	8%	17%	20%
This is a barrier	25%	25%	34%	25%	29%	28%	31%	36%	22%	27%	21%	26%	21%	40%	31%	37%
This is not much of a barrier	35%	33%	39%	32%	30%	41%	26%	39%	36%	27%	35%	37%	34%	31%	37%	29%
This is not a barrier at all	23%	26%	16%	22%	25%	22%	19%	11%	26%	25%	24%	20%	23%	17%	12%	11%
Don't Know	4%	5%	4%	2%	5%	1%	5%	4%	2%	7%	9%	12%	10%	5%	2%	2%

Which of the following, if any, are barriers to your business making more use of AI?: Lack of skills in the company to use AI

BASE: All Respondents

This is a significant barrier	12%	11%	13%	16%	11%	11%	15%	14%	10%	11%	14%	14%	16%	11%	18%	27%
This is a barrier	32%	25%	36%	37%	31%	32%	35%	35%	32%	34%	33%	26%	32%	36%	36%	31%
This is not much of a barrier	28%	34%	27%	25%	33%	28%	28%	37%	24%	28%	24%	29%	27%	36%	35%	23%
This is not a barrier at all	24%	23%	19%	20%	23%	27%	20%	10%	31%	22%	20%	22%	20%	14%	10%	17%
Don't Know	4%	6%	4%	2%	2%	3%	2%	4%	3%	5%	9%	9%	6%	3%	1%	2%

Which of the following, if any, are barriers to your business making more use of AI?: I do not see how AI could be useful to our business

BASE: All Respondents

This is a significant barrier	11%	8%	9%	10%	7%	11%	12%	12%	13%	11%	16%	9%	15%	14%	14%	15%
This is a barrier	20%	13%	27%	21%	22%	20%	23%	28%	21%	17%	19%	16%	16%	19%	25%	32%
This is not much of a barrier	30%	35%	30%	29%	26%	29%	28%	27%	32%	37%	22%	30%	31%	31%	37%	19%
This is not a barrier at all	34%	41%	29%	39%	39%	35%	35%	25%	30%	31%	34%	30%	29%	32%	23%	30%
Don't Know	5%	4%	5%	2%	5%	4%	2%	8%	4%	4%	9%	14%	9%	5%	1%	3%

Which of the following, if any, are barriers to your business making more use of AI?: It is challenging to integrate AI tools in our IT system

BASE: All Respondents

This is a significant barrier	10%	4%	11%	12%	10%	9%	13%	12%	9%	11%	13%	7%	12%	11%	17%	19%
This is a barrier	27%	24%	37%	29%	32%	28%	35%	35%	25%	26%	32%	28%	26%	28%	28%	31%
This is not much of a barrier	36%	45%	29%	32%	35%	33%	24%	34%	40%	30%	23%	35%	36%	32%	39%	35%
This is not a barrier at all	22%	22%	18%	25%	20%	23%	22%	14%	23%	26%	26%	21%	15%	20%	13%	15%
Don't Know	5%	5%	4%	2%	4%	7%	6%	5%	3%	7%	7%	9%	10%	9%	3%	1%

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	Country															
	Total	Italy	Netherlands	France	Spain	Poland	Ireland	Belgium	Germany	Sweden	Romania	Finland	Czech Republic	Greece	Norway	Denmark
Unweighted	2348	146	141	283	146	139	141	137	148	139	141	138	135	279	114	121
Weighted	2348	310	65	289	182	246	22	45	719	50	162	31	92	84	21	29

Which of the following, if any, are barriers to your business making more use of AI?: Data leakage or privacy risks would be too damaging to our business

BASE: All Respondents

This is a significant barrier	21%	16%	14%	26%	23%	19%	29%	24%	21%	17%	23%	13%	15%	31%	28%	21%
This is a barrier	32%	27%	33%	28%	41%	34%	39%	33%	33%	33%	34%	26%	28%	39%	31%	41%
This is not much of a barrier	25%	33%	31%	28%	15%	26%	17%	29%	21%	30%	24%	37%	27%	19%	27%	25%
This is not a barrier at all	18%	21%	15%	17%	19%	19%	13%	11%	22%	15%	12%	13%	21%	7%	12%	13%
Don't Know	4%	4%	7%	3%	3%	2%	2%	4%	3%	6%	7%	11%	9%	4%	3%	1%

Which of the following, if any, are barriers to your business making more use of AI?: We have limited data in our business that we could leverage for AI

BASE: All Respondents

This is a significant barrier	10%	5%	11%	11%	10%	10%	11%	10%	13%	12%	7%	8%	12%	5%	16%	21%
This is a barrier	24%	30%	31%	28%	20%	24%	30%	30%	19%	23%	25%	24%	24%	36%	27%	29%
This is not much of a barrier	34%	36%	34%	32%	38%	35%	29%	44%	35%	33%	33%	33%	32%	28%	38%	29%
This is not a barrier at all	26%	24%	20%	27%	26%	28%	26%	14%	30%	25%	27%	22%	22%	25%	15%	18%
Don't Know	5%	4%	5%	2%	5%	3%	4%	2%	4%	8%	8%	13%	11%	6%	4%	3%

Which of the following, if any, are barriers to your business making more use of AI?: Concerns about the environmental impact of AI tools

BASE: All Respondents

This is a significant barrier	10%	6%	8%	14%	8%	8%	15%	11%	10%	11%	11%	7%	10%	10%	14%	25%
This is a barrier	21%	20%	26%	25%	21%	20%	29%	27%	19%	22%	26%	22%	12%	21%	30%	25%
This is not much of a barrier	30%	34%	30%	31%	30%	29%	27%	31%	31%	31%	24%	31%	29%	31%	38%	20%
This is not a barrier at all	34%	34%	30%	29%	35%	40%	27%	24%	38%	29%	31%	29%	40%	31%	14%	28%
Don't Know	5%	6%	6%	2%	6%	3%	3%	7%	3%	6%	8%	11%	9%	7%	4%	1%

Which of the following, if any, are barriers to your business making more use of AI?: Concerns about the dependence on companies based outside of the EU

BASE: All Respondents

This is a significant barrier	12%	6%	11%	15%	12%	12%	18%	12%	13%	9%	12%	8%	14%	9%	15%	27%
This is a barrier	25%	27%	30%	31%	25%	25%	31%	34%	19%	25%	29%	22%	19%	30%	37%	28%
This is not much of a barrier	35%	33%	35%	29%	35%	35%	24%	37%	40%	38%	31%	31%	32%	34%	36%	33%
This is not a barrier at all	23%	29%	18%	22%	25%	25%	18%	13%	24%	21%	17%	24%	23%	19%	11%	10%
Don't Know	5%	5%	6%	3%	3%	3%	8%	4%	3%	6%	10%	15%	12%	9%	1%	2%

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	Total	Country														
		Italy	Netherlands	France	Spain	Poland	Ireland	Belgium	Germany	Sweden	Romania	Finland	Czech Republic	Greece	Norway	Denmark
Unweighted	2348	146	141	283	146	139	141	137	148	139	141	138	135	279	114	121
Weighted	2348	310	65	289	182	246	22	45	719	50	162	31	92	84	21	29

What are the main barriers to your business making more use of AI? Select up to five of the following

BASE: All Respondents

Concerns about cybersecur	26%	25%	31%	29%	24%	28%	33%	25%	25%	30%	30%	23%	24%	26%	31%	18%
Concerned about inaccura	24%	18%	20%	24%	24%	21%	32%	14%	27%	34%	19%	37%	27%	27%	29%	24%
Concerns about legal rec	22%	24%	20%	24%	25%	21%	25%	22%	23%	28%	12%	18%	19%	23%	24%	21%
Cost of AI tools	22%	21%	25%	21%	23%	21%	28%	24%	19%	23%	28%	19%	27%	32%	26%	20%
Concerned about curren	17%	16%	17%	19%	19%	15%	18%	19%	16%	15%	23%	22%	12%	17%	23%	19%
Concerned about biases	17%	19%	12%	11%	17%	12%	10%	15%	21%	15%	15%	26%	10%	15%	23%	20%
AI is not transparent enc	17%	12%	16%	17%	18%	14%	16%	19%	19%	14%	19%	16%	14%	16%	20%	16%
AI is unlikely to help us e	15%	11%	14%	11%	10%	12%	14%	13%	19%	18%	22%	13%	12%	11%	16%	16%
We don't have the exper	14%	14%	12%	12%	13%	14%	20%	19%	13%	20%	13%	13%	13%	16%	16%	14%
We just have other prior	13%	7%	16%	9%	12%	15%	15%	22%	14%	11%	19%	14%	19%	10%	20%	20%
We don't have the skills	12%	11%	11%	13%	12%	13%	6%	15%	9%	18%	16%	16%	16%	18%	16%	12%
I do not see how AI coul	12%	9%	14%	12%	7%	11%	14%	17%	11%	16%	18%	18%	12%	12%	17%	18%
Resistance to change wit	12%	13%	12%	12%	10%	13%	12%	14%	10%	13%	11%	16%	10%	7%	9%	15%
AI is unlikely to help us c	11%	13%	12%	8%	10%	14%	9%	14%	9%	13%	15%	19%	14%	11%	15%	17%
Lack of support ecosyste	11%	7%	13%	12%	13%	13%	14%	10%	9%	15%	20%	11%	11%	14%	23%	18%
Lack of customer deman	11%	8%	9%	10%	11%	17%	14%	9%	8%	13%	16%	15%	7%	11%	16%	16%
None of the above - ther	10%	15%	8%	12%	8%	9%	2%	4%	12%	7%	5%	5%	6%	8%	3%	9%
We don't have the time	10%	10%	4%	8%	9%	14%	8%	15%	8%	8%	13%	12%	17%	9%	13%	7%
Access and availability of	9%	6%	14%	9%	8%	8%	15%	8%	11%	10%	9%	10%	5%	5%	14%	12%
Not sure where to start	8%	5%	15%	7%	4%	16%	11%	8%	6%	10%	6%	12%	15%	10%	13%	9%
We already make extens	5%	3%	4%	5%	6%	5%	8%	6%	7%	8%	1%	4%	8%	5%	3%	9%
Don't Know	3%	5%	3%	1%	5%	2%	2%	3%	3%	3%	2%	3%	2%	2%	1%	3%
Other (Please Specify)	1%	1%	2%	1%	3%	0%	0%	1%	2%	1%	0%	0%	1%	0%	1%	3%

Which of the following are the biggest incentives for your business to make more use of AI? Select up to three of the following

BASE: All Respondents

It would save my employ	29%	25%	24%	26%	32%	34%	31%	36%	30%	28%	32%	34%	27%	27%	28%	22%
It would just make us mc	25%	28%	22%	30%	13%	28%	34%	28%	22%	22%	30%	23%	24%	22%	31%	30%
It would save me person	24%	23%	14%	26%	29%	26%	23%	25%	22%	20%	30%	29%	27%	20%	22%	28%
It would make our busin	22%	20%	21%	24%	26%	19%	26%	21%	23%	23%	25%	25%	19%	22%	25%	20%
It would make us more c	19%	24%	15%	13%	21%	15%	12%	20%	21%	21%	20%	18%	16%	24%	22%	20%
It would allow us to grov	19%	22%	18%	19%	23%	21%	21%	20%	14%	25%	23%	18%	17%	26%	20%	21%
I think it will become the	18%	14%	16%	16%	15%	20%	15%	16%	22%	20%	15%	16%	19%	17%	29%	21%
It would show that our b	18%	20%	18%	13%	15%	21%	20%	22%	18%	18%	19%	14%	17%	17%	16%	18%
It would allow us to scal	17%	14%	16%	16%	20%	15%	22%	11%	19%	16%	15%	16%	18%	12%	21%	18%
It would allow us to sell	17%	16%	18%	16%	15%	21%	15%	11%	16%	21%	14%	17%	15%	18%	18%	15%
Customers or clients are	12%	9%	9%	15%	16%	13%	9%	12%	10%	16%	11%	17%	15%	13%	17%	15%
None of the above - ther	8%	7%	13%	10%	4%	7%	9%	8%	9%	12%	9%	6%	11%	6%	7%	11%
Don't Know	3%	4%	3%	2%	4%	2%	2%	3%	2%	2%	3%	1%	2%	3%	2%	1%
Other (Please Specify)	0%	0%	2%	0%	0%	0%	0%	1%	0%	0%	0%	0%	1%	0%	0%	0%

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	Country															
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Weighted	2348	310	65	289	182	246	22	45	719	50	162	31	92	84	21	29

How confident or unconfident are you that your business has the right skills to take advantage of AI?

BASE: All Respondents

Very confident	30%	29%	19%	29%	28%	17%	20%	17%	40%	21%	30%	22%	19%	19%	25%	36%
Somewhat confident	39%	40%	34%	40%	46%	38%	47%	35%	38%	45%	36%	47%	34%	36%	46%	39%
Neither confident or unconfident	18%	14%	27%	16%	13%	34%	16%	27%	13%	18%	23%	14%	23%	28%	14%	7%
Somewhat unconfident	7%	6%	14%	9%	5%	7%	12%	10%	3%	10%	6%	11%	9%	10%	10%	8%
Not at all confident	4%	5%	4%	5%	6%	2%	4%	7%	2%	4%	4%	4%	11%	4%	4%	7%
Don't Know	3%	5%	2%	1%	2%	2%	2%	3%	4%	1%	1%	1%	4%	4%	1%	2%

In particular which, if any, of the following types of skills would you say your business needs more of to take full advantage of AI? Please select all that apply

BASE: All Respondents

AI strategy and implementation	35%	32%	31%	33%	51%	28%	26%	25%	37%	36%	38%	32%	30%	29%	32%	32%
Data analysis skills	33%	35%	24%	31%	31%	38%	29%	32%	35%	30%	27%	33%	27%	26%	33%	33%
General digital skills	31%	37%	18%	23%	27%	41%	29%	21%	35%	20%	30%	27%	17%	31%	26%	24%
Cybersecurity skills	31%	33%	26%	34%	33%	30%	31%	30%	33%	27%	30%	31%	15%	32%	30%	17%
Skills in AI model customisation	29%	32%	27%	27%	38%	36%	36%	25%	26%	22%	33%	26%	18%	27%	24%	25%
Skills with IT infrastructure	26%	27%	19%	24%	19%	29%	25%	21%	30%	30%	24%	29%	25%	22%	32%	32%
AI ethics and responsible AI	26%	21%	27%	29%	34%	27%	22%	18%	28%	28%	23%	18%	11%	24%	31%	27%
Writing good prompts for AI	25%	22%	19%	27%	28%	30%	20%	21%	24%	31%	27%	21%	17%	26%	34%	22%
Programming and coding	22%	12%	22%	21%	27%	26%	24%	25%	20%	30%	28%	30%	17%	35%	28%	29%
General entrepreneurship	20%	23%	20%	19%	20%	21%	13%	19%	22%	19%	18%	15%	15%	18%	20%	24%
None of the above - we have all the skills	9%	6%	11%	8%	5%	5%	10%	7%	12%	8%	10%	4%	16%	6%	7%	9%
Don't Know	4%	4%	3%	3%	3%	2%	4%	5%	4%	3%	5%	6%	6%	5%	2%	3%

Thinking about things that could help your business use AI, which of the following, if any, would be useful for your business? Select any which apply

BASE: All Respondents

Upskilling programmes for employees	40%	35%	37%	32%	40%	43%	38%	32%	45%	48%	41%	44%	38%	35%	35%	25%
Improved education around AI	33%	36%	28%	29%	26%	29%	23%	32%	37%	28%	26%	30%	23%	35%	27%	34%
Best practice guides for AI	32%	33%	23%	34%	40%	37%	35%	26%	30%	25%	32%	30%	18%	36%	36%	35%
Guidance on how to connect with AI	30%	31%	28%	33%	41%	28%	38%	26%	27%	37%	28%	27%	24%	36%	27%	34%
Access to finance for AI (e.g. grants)	30%	35%	25%	24%	37%	28%	31%	26%	25%	27%	40%	26%	31%	37%	37%	26%
Partnership facilitation for AI	26%	22%	22%	26%	24%	27%	24%	23%	26%	34%	36%	27%	29%	25%	32%	27%
Programs to help small businesses	25%	23%	19%	27%	30%	21%	25%	27%	26%	25%	32%	22%	22%	20%	26%	34%
Knowledge sharing forums	25%	25%	24%	21%	30%	22%	27%	17%	29%	29%	24%	19%	17%	30%	31%	20%
None of the above	10%	8%	12%	12%	5%	7%	7%	6%	13%	9%	10%	4%	14%	6%	9%	12%
Don't Know	4%	5%	3%	2%	5%	2%	2%	4%	4%	2%	4%	4%	6%	6%	1%	3%

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You said that upskilling programmes for AI would be useful for your business. Which of the following, if any, would you like to see deliver these sorts of programmes? Select any which apply

BASE: Upskilling programmes would be useful

Technology companies	65%	61%	66%	57%	72%	62%	64%	44%	70%	56%	74%	60%	60%	62%	56%	69%
Online training program	54%	64%	46%	51%	45%	58%	63%	49%	55%	54%	52%	41%	47%	55%	66%	48%
Universities and educational institutions	48%	38%	46%	40%	43%	38%	36%	47%	54%	62%	57%	45%	49%	62%	52%	32%
Teams or individuals within your company	46%	36%	24%	56%	39%	41%	27%	42%	52%	49%	46%	31%	41%	37%	55%	55%
The National Government	31%	28%	26%	33%	44%	41%	32%	20%	22%	32%	46%	29%	29%	41%	33%	36%
None of the above	1%	2%	7%	1%	0%	0%	0%	6%	0%	0%	0%	1%	4%	3%	3%	0%
Don't Know	1%	1%	2%	1%	2%	2%	2%	2%	0%	2%	0%	5%	2%	1%	0%	0%

In general, what impact do you expect the improvements to AI over the next 5 years to have on your business headcount, if any?

BASE: All Respondents

Greatly increase headcount	12%	9%	6%	13%	10%	13%	12%	9%	15%	14%	8%	7%	2%	3%	19%	20%
Somewhat increase headcount	30%	41%	23%	19%	29%	36%	23%	25%	32%	36%	24%	30%	24%	21%	32%	32%
Not change headcount	37%	34%	49%	42%	39%	32%	29%	41%	36%	32%	32%	40%	49%	33%	32%	32%
Somewhat decrease headcount	13%	5%	16%	17%	15%	10%	23%	19%	9%	12%	25%	15%	12%	21%	9%	11%
Greatly decrease headcount	3%	1%	1%	4%	3%	4%	5%	2%	2%	1%	6%	4%	4%	14%	3%	2%
Don't Know	6%	9%	5%	4%	4%	5%	8%	5%	6%	4%	5%	5%	8%	8%	5%	2%

Thinking about the jobs in your company, are there any which you believe AI could do almost all of in the next 5 years?

BASE: All Respondents

Yes, every job in my company	12%	11%	7%	12%	10%	12%	6%	8%	14%	15%	10%	7%	3%	10%	19%	19%
Yes, the majority of the jobs	22%	21%	20%	22%	28%	23%	27%	25%	22%	23%	19%	26%	13%	13%	29%	30%
Yes, around half of the jobs	16%	19%	16%	14%	18%	23%	17%	19%	11%	16%	11%	13%	28%	20%	12%	12%
Yes, a minority of the jobs	14%	16%	14%	16%	15%	19%	16%	14%	10%	14%	17%	10%	14%	19%	11%	12%
Yes, a very small number	11%	12%	9%	11%	12%	5%	9%	10%	10%	12%	10%	21%	15%	14%	9%	6%
No, none of the jobs in my company	22%	17%	30%	22%	14%	16%	20%	21%	27%	16%	26%	15%	19%	21%	18%	19%
Don't Know	4%	5%	3%	2%	3%	2%	6%	3%	5%	4%	6%	8%	9%	4%	3%	1%

You said there were at least some jobs in your company which you expect could be done almost entirely by AI in the next 5 years. Which of the following best describes how your company would respond to these instances?

BASE: Expect some jobs could be done by AI

We would keep hiring humans	32%	27%	30%	35%	29%	36%	23%	22%	38%	31%	24%	25%	12%	23%	37%	43%
We would use AI for the majority of jobs	51%	53%	40%	46%	56%	47%	58%	48%	53%	49%	54%	48%	58%	51%	42%	38%
We would use AI for some jobs	10%	11%	23%	13%	10%	11%	16%	22%	3%	15%	10%	18%	15%	18%	15%	9%
We would cut down on hiring humans	5%	7%	6%	5%	4%	4%	3%	6%	3%	3%	10%	6%	9%	6%	5%	7%
Don't Know	2%	1%	2%	1%	1%	3%	1%	3%	3%	1%	2%	3%	6%	1%	2%	3%

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Which of the following comes closest to your view?

BASE: All Respondents

AI will change the way m	49%	48%	49%	51%	47%	56%	50%	47%	50%	58%	47%	32%	36%	46%	61%	48%
AI is unlikely to have mu	42%	41%	43%	40%	45%	40%	39%	41%	42%	34%	43%	47%	56%	43%	34%	48%
Don't Know	9%	11%	9%	8%	8%	4%	10%	12%	8%	8%	10%	21%	9%	11%	5%	4%

Which of the following comes closest to your view?

BASE: All Respondents

AI is a short-term trend v	16%	12%	15%	18%	17%	18%	18%	14%	18%	15%	9%	13%	20%	11%	19%	20%
AI is here to stay	77%	81%	73%	76%	79%	76%	73%	77%	77%	78%	81%	76%	71%	83%	79%	74%
Don't Know	6%	7%	12%	6%	5%	6%	9%	9%	5%	7%	9%	12%	9%	6%	2%	6%

Which of the following comes closest to your view?

BASE: All Respondents

My business is ahead of	28%	35%	23%	31%	28%	22%	23%	16%	27%	25%	38%	22%	17%	21%	32%	30%
My business is not ahead	50%	42%	49%	51%	49%	57%	59%	58%	52%	50%	41%	46%	48%	57%	47%	36%
My business is already t	13%	11%	18%	11%	16%	12%	12%	14%	13%	19%	12%	14%	19%	12%	13%	28%
Don't Know	9%	12%	9%	7%	7%	8%	6%	13%	8%	6%	9%	17%	16%	10%	8%	6%

Which of the following comes closest to your view on the impact AI will have on the roles at your business?

BASE: All Respondents

AI will mainly work as a c	48%	58%	48%	50%	49%	39%	47%	42%	50%	46%	45%	47%	38%	47%	53%	45%
AI will mainly work to re	25%	21%	28%	22%	22%	34%	31%	31%	23%	27%	23%	23%	30%	27%	24%	32%
AI will neither replace nc	21%	13%	18%	23%	24%	21%	15%	19%	21%	20%	27%	21%	27%	23%	21%	20%
Don't Know	6%	8%	6%	5%	6%	6%	7%	8%	6%	6%	4%	9%	6%	4%	3%	4%

Which of the following best describes the impact AI is already having on the roles at your business, if any?

BASE: All Respondents

AI is mainly working as a	55%	54%	49%	59%	59%	55%	50%	52%	55%	55%	52%	44%	52%	61%	57%	52%
AI is mainly working to r	20%	21%	28%	17%	21%	24%	26%	21%	20%	19%	17%	21%	16%	14%	25%	29%
AI is neither replacing nc	20%	19%	20%	20%	16%	18%	20%	20%	19%	19%	28%	26%	26%	22%	16%	14%
Don't Know	5%	6%	3%	4%	4%	3%	4%	8%	6%	7%	3%	9%	5%	4%	3%	5%

Do you think an AI would ever be capable of doing your job?

BASE: All Respondents

Yes, AI is already capable	11%	10%	12%	10%	11%	8%	11%	8%	14%	16%	5%	6%	5%	10%	15%	27%
Yes, AI could do my job v	20%	23%	18%	21%	25%	27%	23%	18%	16%	20%	17%	18%	17%	18%	34%	18%
Yes, AI could do my job i	15%	17%	12%	14%	16%	20%	17%	18%	12%	14%	20%	16%	13%	16%	9%	12%
AI could eventually do m	13%	13%	14%	13%	12%	16%	14%	12%	9%	16%	21%	26%	15%	16%	15%	7%
AI could never do my job	37%	30%	40%	39%	32%	28%	31%	37%	44%	26%	32%	26%	46%	35%	25%	35%
Don't Know	4%	6%	3%	4%	5%	2%	4%	7%	4%	7%	6%	9%	5%	5%	2%	1%

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Have you been involved in any of the following at your workplace? Select any which apply

BASE: All Respondents

Discussions about how to	46%	49%	31%	56%	38%	48%	44%	37%	46%	53%	45%	43%	41%	39%	53%	57%
Discussions about the irr	42%	41%	32%	44%	42%	44%	36%	40%	43%	46%	45%	42%	32%	43%	53%	44%
Discussions about how y	40%	34%	40%	42%	31%	49%	42%	34%	41%	48%	47%	43%	30%	39%	51%	41%
Discussions about how y	31%	18%	28%	35%	25%	35%	33%	31%	35%	35%	35%	32%	31%	33%	43%	35%
Don't Know	3%	3%	5%	2%	4%	4%	3%	3%	1%	6%	1%	7%	2%	3%	0%	1%
None of the above	19%	19%	26%	16%	25%	10%	15%	17%	20%	12%	18%	14%	29%	19%	13%	16%

Thinking about how AI could be used in businesses, which of the following tasks do you think AI will be most able to do, if any? Select up to three of the following

BASE: All Respondents

Tasks which are very rep	42%	41%	32%	46%	48%	38%	49%	42%	41%	35%	49%	40%	47%	41%	47%	37%
Tasks which require a lot	36%	39%	39%	32%	36%	40%	34%	32%	35%	31%	35%	40%	46%	32%	42%	31%
Tasks which require a lot	34%	27%	30%	39%	32%	39%	29%	30%	37%	36%	28%	36%	34%	28%	37%	31%
Tasks which require a lot	32%	24%	22%	37%	33%	24%	31%	29%	35%	36%	34%	26%	29%	36%	36%	33%
Tasks which require a lot	23%	26%	22%	23%	22%	24%	27%	19%	18%	32%	29%	21%	17%	32%	21%	39%
Tasks which require crea	21%	26%	26%	22%	18%	26%	20%	24%	18%	21%	23%	24%	19%	19%	30%	23%
Tasks which require man	20%	13%	19%	15%	17%	32%	18%	18%	25%	22%	15%	23%	11%	18%	26%	25%
Tasks which require com	20%	20%	20%	17%	22%	25%	18%	19%	22%	20%	17%	17%	15%	15%	18%	21%
None of the above could	5%	3%	8%	6%	4%	3%	5%	6%	7%	5%	5%	4%	6%	3%	3%	7%
Don't Know	3%	4%	3%	2%	6%	2%	3%	5%	2%	5%	3%	4%	6%	3%	1%	3%

Thinking about how AI could be used in businesses, which of the following tasks do you think AI will be least able to do? Select up to three of the following

BASE: All Respondents

Tasks which require com	35%	27%	33%	38%	29%	32%	38%	36%	41%	38%	26%	22%	31%	43%	40%	34%
Tasks which require crea	32%	25%	28%	25%	37%	31%	30%	29%	38%	33%	33%	19%	28%	33%	37%	33%
Tasks which require a lot	28%	25%	24%	29%	23%	36%	24%	23%	32%	23%	26%	27%	22%	19%	35%	30%
Tasks which require a lot	24%	28%	22%	21%	21%	22%	31%	29%	26%	22%	27%	28%	19%	14%	23%	32%
Tasks which require a lot	21%	22%	19%	19%	21%	21%	29%	21%	20%	23%	22%	30%	15%	22%	25%	26%
Tasks which require man	19%	17%	18%	19%	23%	23%	25%	15%	16%	20%	26%	16%	19%	21%	23%	17%
Tasks which are very rep	16%	14%	14%	18%	12%	21%	17%	12%	17%	18%	16%	24%	16%	15%	19%	16%
Tasks which require a lot	11%	8%	7%	12%	12%	12%	5%	9%	11%	11%	13%	18%	13%	6%	9%	7%
Don't Know	8%	10%	10%	9%	10%	5%	4%	10%	5%	9%	8%	11%	16%	9%	5%	8%

In general, which of the following best describe the tasks which AI could do in your organisation?

BASE: All Respondents

AI could mostly do the t	35%	33%	32%	36%	34%	30%	29%	26%	37%	34%	34%	23%	37%	41%	34%	38%
AI could do both tasks w	38%	40%	36%	35%	43%	45%	36%	37%	39%	38%	35%	36%	24%	31%	30%	32%
AI could mostly do the t	11%	11%	10%	17%	12%	12%	15%	17%	5%	11%	12%	18%	12%	13%	22%	14%
AI could not do any task	11%	10%	14%	8%	3%	8%	13%	11%	12%	12%	15%	12%	18%	7%	10%	10%
Don't Know	6%	6%	8%	4%	8%	5%	8%	9%	6%	5%	5%	11%	9%	8%	4%	5%

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Has your company established formal internal guidelines or policies for the use of Generative AI tools (eg., Google Gemini, ChatGPT) by employees?

BASE: All Respondents

Yes, mandatory guidelines	22%	24%	19%	24%	14%	22%	19%	7%	28%	18%	18%	21%	10%	14%	32%	27%
Yes, recommended best	38%	39%	28%	45%	49%	39%	43%	46%	37%	39%	27%	32%	33%	33%	37%	38%
No, but we plan to do so	17%	14%	24%	14%	20%	21%	13%	23%	13%	25%	25%	21%	18%	26%	13%	14%
No, and no plans to do so	19%	16%	26%	15%	12%	13%	18%	18%	21%	15%	27%	21%	35%	22%	15%	19%
Don't know	3%	6%	3%	2%	4%	6%	6%	6%	1%	4%	3%	5%	5%	5%	3%	2%

Has your company appointed a dedicated individual or team (e.g., an AI Ethics Officer, AI Steering Committee) to oversee AI strategy and responsible use?

BASE: All Respondents

Yes, a dedicated individual	40%	45%	29%	47%	46%	40%	37%	30%	42%	42%	32%	20%	16%	29%	47%	49%
No, but AI oversight is present	34%	29%	40%	31%	31%	37%	31%	38%	35%	37%	32%	40%	40%	36%	34%	26%
No, and we have no plan	22%	19%	27%	20%	19%	21%	27%	26%	20%	18%	28%	29%	39%	30%	18%	24%
Don't know	4%	7%	4%	3%	4%	2%	6%	6%	3%	4%	8%	11%	5%	4%	1%	1%

How well is your organization equipped with AI talent and expertise?

BASE: All Respondents

No dedicated AI expertise	26%	18%	38%	20%	31%	29%	26%	22%	26%	28%	26%	27%	33%	33%	30%	35%
Some in-house AI expertise	43%	41%	37%	47%	40%	45%	43%	53%	45%	40%	38%	48%	34%	40%	44%	39%
Strong internal AI team	24%	28%	20%	27%	24%	23%	24%	15%	24%	24%	24%	17%	17%	21%	24%	23%
Don't Know	7%	13%	5%	5%	5%	3%	8%	10%	5%	9%	13%	8%	15%	7%	2%	2%

Which of the following, if any, has your business done within the last 12 months?: Created a dedicated data lake for AI

BASE: All Respondents

We have done this over 12 months	15%	9%	14%	14%	16%	19%	17%	14%	19%	13%	10%	13%	7%	15%	18%	29%
We have done this in the last 12 months	29%	30%	27%	32%	38%	25%	21%	24%	27%	29%	31%	26%	24%	23%	31%	27%
We have not done this, but plan to	26%	26%	24%	24%	23%	24%	24%	31%	25%	30%	27%	22%	29%	26%	24%	17%
We have not done this and have no plan	24%	22%	29%	23%	19%	20%	32%	20%	24%	21%	26%	30%	36%	27%	22%	25%
Don't Know	7%	13%	6%	7%	4%	3%	5%	11%	6%	7%	6%	9%	4%	9%	4%	2%

Which of the following, if any, has your business done within the last 12 months?: Secured new vendor contracts to prepare for AI usage

BASE: All Respondents

We have done this over 12 months	20%	19%	18%	20%	24%	18%	13%	14%	25%	20%	14%	20%	10%	14%	19%	19%
We have done this in the last 12 months	32%	31%	28%	35%	30%	41%	36%	32%	31%	30%	31%	28%	24%	23%	33%	37%
We have not done this, but plan to	21%	20%	22%	21%	28%	23%	17%	23%	16%	26%	22%	19%	26%	33%	24%	19%
We have not done this and have no plan	23%	22%	28%	22%	16%	18%	27%	25%	24%	17%	25%	23%	35%	23%	21%	23%
Don't Know	5%	8%	4%	3%	2%	1%	6%	6%	5%	6%	8%	9%	5%	7%	3%	1%

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	Total	Country														
		Italy	Netherlands	France	Spain	Poland	Ireland	Belgium	Germany	Sweden	Romania	Finland	Czech Republic	Greece	Norway	Denmark
Unweighted	2348	146	141	283	146	139	141	137	148	139	141	138	135	279	114	121
Weighted	2348	310	65	289	182	246	22	45	719	50	162	31	92	84	21	29

Which of the following, if any, has your business done within the last 12 months?: Implemented internal training programs specifically focused on AI skills

BASE: All Respondents

We have done this over 12 months	18%	15%	21%	21%	17%	23%	24%	15%	21%	17%	11%	13%	15%	13%	20%	17%
We have done this in the last 6 months	39%	40%	28%	37%	44%	38%	28%	31%	43%	37%	44%	37%	23%	32%	41%	47%
We have not done this, but plan to in the next 6 months	19%	20%	22%	21%	21%	23%	24%	27%	15%	24%	17%	17%	23%	30%	20%	11%
We have not done this and do not plan to in the next 6 months	19%	19%	25%	20%	16%	15%	21%	19%	18%	18%	23%	23%	34%	21%	15%	25%
Don't Know	4%	6%	3%	2%	2%	2%	3%	8%	3%	4%	6%	10%	5%	4%	4%	1%

Which of the following, if any, has your business done within the last 12 months?: Adjusted job descriptions to account for the use of AI tools

BASE: All Respondents

We have done this over 12 months	18%	17%	17%	16%	15%	20%	19%	10%	23%	15%	11%	14%	11%	15%	24%	20%
We have done this in the last 6 months	36%	35%	28%	38%	42%	35%	32%	33%	37%	41%	35%	36%	32%	27%	30%	37%
We have not done this, but plan to in the next 6 months	20%	21%	25%	23%	22%	27%	18%	24%	14%	25%	24%	19%	18%	29%	21%	18%
We have not done this and do not plan to in the next 6 months	22%	21%	26%	21%	18%	17%	26%	24%	22%	15%	25%	21%	33%	23%	23%	24%
Don't Know	4%	7%	4%	3%	3%	1%	6%	9%	3%	4%	5%	9%	5%	5%	3%	1%

Which of the following, if any, has your business done within the last 12 months?: Engaged in a formal partnership with an external technology vendor, consultancy, or research institution specifically for AI implementation

BASE: All Respondents

We have done this over 12 months	21%	19%	25%	22%	17%	17%	22%	14%	26%	21%	14%	17%	16%	14%	20%	25%
We have done this in the last 6 months	34%	34%	27%	30%	45%	44%	28%	25%	33%	31%	32%	30%	22%	30%	38%	29%
We have not done this, but plan to in the next 6 months	20%	21%	14%	24%	21%	18%	17%	27%	16%	24%	20%	18%	23%	26%	18%	21%
We have not done this and do not plan to in the next 6 months	22%	21%	29%	20%	16%	20%	29%	27%	23%	19%	27%	24%	35%	25%	20%	23%
Don't Know	4%	5%	6%	4%	1%	1%	4%	7%	3%	5%	6%	11%	4%	5%	3%	2%

Which of the following, if any, has your business done within the last 12 months?: Hired an applicant in part because they had skills with AI

BASE: All Respondents

We have done this over 12 months	21%	18%	21%	20%	20%	26%	13%	15%	26%	17%	16%	16%	13%	19%	21%	27%
We have done this in the last 6 months	32%	33%	28%	38%	38%	29%	35%	31%	30%	50%	27%	35%	28%	24%	28%	27%
We have not done this, but plan to in the next 6 months	20%	19%	15%	19%	19%	27%	20%	26%	18%	13%	25%	15%	22%	24%	24%	22%
We have not done this and do not plan to in the next 6 months	23%	23%	32%	21%	19%	19%	28%	22%	23%	17%	23%	25%	33%	28%	24%	22%
Don't Know	4%	7%	4%	2%	3%	0%	4%	6%	3%	3%	8%	9%	6%	4%	2%	1%

You said that your business has implemented internal training programs specifically focussed on AI skills. Were these optional or mandatory for relevant employees?

BASE: Implemented training programs

Mandatory for relevant employees	60%	59%	51%	62%	61%	58%	67%	46%	66%	63%	43%	46%	57%	53%	65%	76%
Optional for relevant employees	37%	36%	46%	35%	36%	38%	32%	50%	33%	37%	56%	51%	38%	45%	34%	24%
Don't Know	2%	5%	3%	3%	3%	4%	1%	4%	1%	0%	1%	4%	5%	2%	1%	0%

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To what extent do you think senior leaders in your organization are aligned and committed to AI-driven change?

BASE: All Respondents

Low Alignment - Leaders	18%	16%	25%	19%	16%	19%	23%	19%	16%	25%	22%	15%	19%	21%	13%	20%
Moderate Alignment - Sc	45%	45%	48%	46%	55%	52%	46%	52%	37%	43%	46%	52%	51%	50%	44%	51%
High Alignment - Leader:	29%	31%	15%	28%	25%	26%	26%	18%	37%	26%	22%	21%	18%	21%	33%	26%
Don't Know	8%	8%	12%	6%	4%	4%	5%	11%	10%	6%	11%	13%	13%	8%	9%	3%

Which of the following best describes your organization's current engagement with Agentic AI?

BASE: All Respondents

Unaware - We a	16%	16%	19%	11%	13%	14%	16%	12%	17%	11%	21%	13%	23%	26%	15%	15%
Monitoring - We	28%	32%	36%	25%	28%	36%	29%	32%	24%	26%	22%	31%	28%	28%	26%	20%
Evaluating - We	23%	23%	24%	22%	19%	20%	26%	34%	22%	26%	27%	28%	20%	21%	30%	28%
Piloting - We are	14%	11%	8%	18%	16%	12%	14%	9%	17%	18%	7%	18%	12%	9%	16%	15%
Production - We	13%	10%	6%	19%	20%	13%	7%	5%	15%	11%	8%	5%	8%	12%	12%	14%
Don't Know	6%	7%	7%	4%	4%	6%	8%	8%	4%	6%	14%	5%	8%	4%	2%	8%

You said that you are at least monitoring Agentic AI. What are the main reasons for this? Select any which apply

BASE: Monitoring agentic AI

To improve quality or ac	36%	31%	26%	35%	38%	34%	23%	24%	40%	37%	48%	28%	41%	30%	21%	26%
To support innovation	33%	36%	26%	30%	33%	30%	26%	32%	36%	28%	35%	26%	27%	29%	31%	35%
To reduce manual or rep	32%	28%	19%	40%	36%	30%	35%	28%	33%	28%	29%	27%	33%	32%	25%	24%
Interested in the area	28%	24%	28%	21%	21%	32%	23%	20%	32%	26%	29%	25%	36%	26%	26%	30%
To improve productivity	27%	31%	24%	26%	34%	21%	32%	26%	24%	27%	41%	30%	21%	28%	42%	29%
Interested in the cost sav	27%	26%	21%	27%	29%	29%	21%	20%	24%	21%	35%	28%	34%	41%	27%	19%
We have processes whic	25%	19%	33%	21%	27%	32%	21%	22%	26%	34%	28%	30%	30%	13%	26%	28%
To future-proof our strat	25%	21%	34%	26%	26%	23%	36%	22%	24%	35%	34%	18%	22%	30%	23%	23%
To understand potential	21%	19%	21%	21%	19%	23%	22%	23%	22%	24%	23%	18%	24%	15%	27%	17%
Worried about falling be	21%	30%	20%	21%	23%	22%	20%	19%	13%	24%	24%	22%	26%	36%	27%	17%
Required as part of digit	20%	17%	18%	22%	15%	12%	15%	9%	27%	22%	18%	19%	22%	9%	21%	18%
Clients/customers are as	13%	12%	7%	13%	10%	18%	16%	14%	13%	19%	22%	12%	6%	10%	14%	14%
Pressure from staff to ex	12%	14%	10%	12%	6%	15%	14%	5%	13%	11%	13%	18%	12%	4%	18%	16%
Don't Know	1%	1%	1%	1%	2%	1%	1%	1%	0%	2%	0%	4%	4%	0%	0%	3%

Do you agree or disagree with the following?: I would be comfortable with an AI system making and taking simple, low-risk actions (like sending an email or moving a file) without a human checking every step

BASE: All Respondents

Strongly Agree	27%	27%	21%	28%	27%	31%	18%	19%	28%	24%	23%	21%	25%	23%	26%	27%
Agree	37%	39%	39%	40%	43%	42%	41%	39%	30%	38%	36%	44%	43%	33%	31%	39%
Neither Agree nor Disagi	19%	16%	21%	17%	17%	18%	22%	21%	20%	18%	20%	21%	19%	32%	24%	16%
Disagree	8%	9%	10%	7%	9%	3%	12%	9%	8%	7%	11%	7%	4%	5%	12%	7%
Strongly Disagree	7%	5%	5%	6%	3%	3%	5%	7%	10%	9%	6%	5%	4%	3%	6%	10%
Don't Know	3%	4%	4%	1%	1%	3%	1%	5%	3%	3%	4%	1%	5%	5%	1%	2%

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Do you agree or disagree with the following?: Agentic AI is necessary to achieve the next major leap in our operational productivity

BASE: All Respondents

Strongly Agree	23%	20%	17%	26%	26%	21%	21%	12%	26%	18%	22%	18%	11%	17%	21%	26%
Agree	34%	40%	32%	36%	36%	35%	31%	38%	31%	46%	31%	36%	29%	30%	35%	26%
Neither Agree nor Disagree	23%	16%	28%	21%	21%	24%	28%	29%	24%	12%	28%	20%	39%	29%	23%	27%
Disagree	6%	10%	9%	7%	6%	8%	8%	9%	4%	6%	3%	10%	4%	8%	11%	10%
Strongly Disagree	7%	7%	6%	6%	3%	5%	7%	8%	10%	10%	8%	12%	10%	4%	6%	8%
Don't Know	6%	7%	9%	4%	8%	7%	5%	4%	4%	8%	8%	4%	7%	11%	4%	4%

Do you agree or disagree with the following?: I worry about falling behind competitors in adopting Agentic AI

BASE: All Respondents

Strongly Agree	16%	11%	13%	11%	24%	10%	23%	10%	21%	16%	17%	16%	4%	11%	11%	30%
Agree	25%	34%	26%	25%	37%	28%	29%	36%	16%	29%	27%	32%	22%	23%	38%	24%
Neither Agree nor Disagree	26%	21%	27%	28%	21%	22%	19%	28%	25%	25%	34%	25%	36%	35%	24%	17%
Disagree	17%	15%	18%	19%	8%	22%	15%	14%	20%	9%	8%	12%	18%	13%	18%	16%
Strongly Disagree	13%	13%	10%	15%	8%	14%	10%	6%	14%	15%	10%	11%	14%	10%	5%	11%
Don't Know	4%	5%	6%	2%	3%	5%	4%	5%	5%	5%	4%	3%	5%	8%	5%	2%

Thinking about the next three years, which comes closest to your view on Agentic AI?

BASE: All Respondents

It is not currently a competitive advantage	24%	20%	30%	18%	14%	22%	24%	26%	28%	20%	27%	26%	20%	29%	24%	26%
It is currently a competitive advantage	45%	48%	47%	50%	52%	46%	47%	52%	37%	51%	38%	47%	53%	45%	48%	47%
It is already a condition of doing business	19%	18%	6%	22%	21%	15%	16%	10%	24%	17%	20%	9%	11%	11%	16%	16%
Don't Know	13%	14%	18%	10%	13%	17%	13%	12%	11%	12%	15%	18%	16%	15%	12%	10%

If autonomous AI agents worked perfectly, which of the following would be the single greatest benefit they would deliver to your business in the next two years? Select only ONE

BASE: All Respondents

Cost Savings	20%	15%	17%	19%	24%	21%	28%	19%	20%	22%	19%	24%	29%	25%	26%	21%
Speed & Scale	34%	39%	36%	31%	39%	34%	34%	39%	31%	35%	29%	41%	33%	36%	23%	33%
Quality & Accuracy	24%	20%	26%	27%	25%	26%	16%	24%	24%	23%	28%	20%	17%	21%	30%	26%
Innovation	14%	17%	10%	17%	8%	13%	11%	11%	16%	13%	12%	10%	10%	11%	14%	10%
Don't Know	8%	9%	11%	5%	5%	5%	11%	8%	8%	7%	12%	5%	12%	7%	6%	8%

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Unweighted	2348	146	141	283	146	139	141	137	148	139	141	138	135	279	114	121
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What are the main barriers to your business making more use of Agentic AI? Select up to five of the following

BASE: All Respondents

Concerns about cybersecur	21%	14%	13%	27%	24%	15%	23%	17%	22%	22%	21%	22%	20%	23%	20%	20%
Cost of Agentic AI	20%	22%	19%	26%	26%	20%	25%	21%	14%	14%	29%	17%	26%	22%	18%	19%
Concerns about legal rec	14%	16%	19%	20%	11%	14%	23%	18%	12%	10%	13%	14%	12%	14%	15%	16%
AI is not transparent enc	14%	6%	12%	10%	13%	13%	10%	12%	20%	13%	15%	11%	7%	13%	11%	10%
Concerned about inaccur	14%	11%	17%	16%	23%	11%	19%	12%	11%	19%	11%	15%	17%	19%	24%	14%
Concerned about biases	14%	11%	11%	14%	18%	15%	12%	8%	16%	10%	6%	19%	10%	8%	9%	20%
We just have other prior	13%	11%	14%	9%	10%	18%	15%	16%	15%	13%	14%	13%	16%	11%	12%	17%
We don't have the exper	13%	11%	14%	10%	14%	12%	16%	12%	14%	17%	12%	16%	18%	16%	20%	17%
Concerned about curren	13%	11%	18%	14%	21%	10%	15%	14%	11%	20%	12%	12%	10%	18%	15%	14%
I do not see how Agentic	12%	7%	8%	7%	12%	10%	11%	11%	16%	16%	12%	11%	15%	11%	11%	11%
None of the above - ther	11%	13%	7%	11%	10%	8%	4%	4%	15%	12%	4%	4%	11%	6%	1%	9%
We don't have the skills	11%	13%	15%	13%	12%	9%	12%	16%	8%	14%	12%	14%	10%	14%	15%	12%
Lack of customer deman	11%	12%	9%	7%	12%	11%	11%	5%	10%	7%	15%	5%	9%	11%	22%	18%
Agentic AI is unlikely to f	10%	10%	10%	7%	8%	9%	12%	11%	11%	11%	18%	14%	11%	8%	15%	11%
Agentic AI is unlikely to f	10%	9%	8%	8%	10%	10%	12%	9%	12%	14%	9%	13%	9%	11%	12%	12%
Resistance to change wit	10%	8%	14%	14%	11%	7%	12%	12%	9%	12%	14%	11%	7%	11%	10%	9%
Lack of support ecosyste	9%	10%	12%	6%	10%	12%	10%	13%	7%	10%	13%	11%	6%	9%	10%	9%
Not sure where to start	8%	7%	5%	4%	4%	4%	13%	11%	11%	14%	6%	7%	10%	11%	13%	8%
We already make extens	8%	7%	7%	7%	6%	6%	12%	9%	8%	11%	10%	10%	7%	5%	11%	12%
We don't have the time	8%	5%	12%	9%	5%	10%	9%	11%	7%	13%	7%	5%	11%	9%	7%	6%
Access and availability of	7%	5%	7%	5%	7%	9%	7%	8%	7%	6%	11%	16%	9%	7%	17%	17%
Don't Know	3%	4%	2%	3%	3%	3%	4%	4%	2%	2%	2%	5%	3%	5%	2%	2%
Other (Please Specify)	1%	1%	2%	1%	1%	0%	1%	0%	0%	1%	0%	0%	1%	0%	1%	0%

Which of the following comes closest to your view?

BASE: All Respondents

Non-European competit	29%	25%	17%	23%	31%	20%	26%	24%	40%	26%	29%	21%	22%	29%	32%	27%
Non-European competit	38%	40%	48%	44%	44%	48%	39%	48%	28%	44%	37%	45%	38%	40%	47%	38%
Non-European competit	12%	10%	9%	17%	9%	16%	14%	7%	12%	10%	14%	13%	10%	9%	10%	16%
Don't Know	20%	25%	27%	16%	16%	15%	22%	22%	20%	20%	21%	21%	30%	22%	11%	18%

Which of the following comes closest to your view?

BASE: All Respondents

AI adoption from Non-Eu	44%	48%	34%	49%	44%	42%	50%	38%	40%	41%	48%	47%	43%	47%	51%	47%
AI adoption from Non-Eu	41%	32%	48%	40%	43%	44%	35%	46%	47%	41%	35%	33%	30%	36%	42%	43%
Don't Know	15%	20%	18%	11%	13%	14%	15%	15%	12%	18%	17%	20%	26%	17%	7%	10%

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Which of the following would most encourage your organization to deploy AI-enabled workforce tools? Select up to two of the following

BASE: All Respondents

Government-funded AI t	38%	38%	23%	41%	47%	42%	48%	31%	33%	36%	45%	28%	37%	50%	43%	28%
Tax incentives for retaini	37%	33%	34%	32%	39%	49%	37%	26%	36%	35%	41%	35%	30%	38%	34%	33%
Competitors successfully	34%	33%	34%	35%	29%	38%	35%	45%	34%	41%	29%	40%	30%	29%	41%	35%
Union/Work council end	23%	19%	20%	23%	26%	22%	18%	20%	27%	26%	21%	21%	23%	18%	30%	29%
None of the above woul	15%	13%	23%	18%	7%	7%	13%	19%	18%	14%	13%	15%	19%	11%	15%	25%
Don't Know	6%	9%	8%	4%	8%	3%	3%	9%	5%	5%	3%	11%	10%	4%	1%	2%

Which of the following comes closest to your view?

BASE: Question displayed when the Question "Does your business operate in any of the following sectors or areas? Select any which apply" is one of the following answers ("Transport", "Automotive")

Non-European automoti	34%	44%	16%	37%	48%	19%	19%	45%	26%	12%	55%	42%	19%	13%	42%	38%
Non-European automoti	36%	33%	56%	25%	52%	67%	30%	36%	35%	44%	17%	52%	15%	50%	35%	27%
Non-European and Euroj	21%	17%	13%	24%	0%	9%	24%	16%	28%	33%	16%	0%	54%	37%	13%	29%
Don't Know	9%	6%	15%	14%	0%	5%	26%	3%	10%	12%	11%	6%	12%	0%	10%	6%

Which of the following comes closest to your view?

BASE: Question displayed when the Question "Does your business operate in any of the following sectors or areas? Select any which apply" is one of the following answers ("Energy")

Implementing AI into the	27%	26%	15%	34%	23%	13%	33%	17%	28%	52%	45%	77%	32%	20%	45%	13%
Implementing AI into the	32%	44%	22%	22%	29%	62%	56%	48%	14%	31%	46%	11%	21%	26%	18%	60%
Implementing AI into the	35%	30%	49%	34%	48%	25%	6%	35%	47%	16%	9%	12%	9%	54%	37%	13%
Don't Know	6%	0%	14%	10%	0%	0%	6%	0%	11%	0%	0%	0%	37%	0%	0%	13%

Which of the following comes closest to your view on organisations producing AI-generated content (such as images, text, video, sound)?

BASE: All Respondents

Organisations should ha	57%	64%	53%	64%	65%	53%	57%	54%	50%	56%	63%	59%	48%	59%	66%	57%
Organisations should be	35%	29%	40%	30%	30%	38%	34%	34%	41%	36%	28%	28%	38%	32%	32%	39%
Don't Know	8%	7%	7%	6%	5%	9%	9%	12%	9%	7%	9%	13%	14%	9%	2%	5%

Which should businesses who use AI to produce content prioritise?

BASE: All Respondents

Metadata which shows t	42%	37%	42%	49%	46%	46%	43%	38%	35%	54%	58%	30%	39%	35%	51%	44%
Human-visible disclaime	49%	53%	46%	45%	50%	48%	50%	50%	55%	38%	29%	55%	44%	57%	45%	47%
Don't Know	9%	10%	11%	6%	4%	6%	7%	12%	10%	8%	13%	15%	17%	8%	4%	9%

Which of the following, if any, have you experienced in your organisation?: Junior employees using AI before receiving training on how to do so

BASE: All Respondents

We have experienced thi	39%	33%	33%	32%	39%	42%	34%	34%	43%	46%	35%	51%	47%	44%	38%	47%
We have not experieced	54%	57%	63%	61%	56%	54%	59%	52%	52%	47%	57%	40%	40%	49%	59%	48%
Don't Know	7%	10%	4%	6%	6%	5%	6%	14%	5%	7%	8%	9%	13%	7%	4%	5%

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	Country															
	Total	Italy	Netherlands	France	Spain	Poland	Ireland	Belgium	Germany	Sweden	Romania	Finland	Czech Republic	Greece	Norway	Denmark
Unweighted	2348	146	141	283	146	139	141	137	148	139	141	138	135	279	114	121
Weighted	2348	310	65	289	182	246	22	45	719	50	162	31	92	84	21	29

Which of the following, if any, have you experienced in your organisation?: AI being used by employees before we have formal systems in place

BASE: All Respondents

We have experienced this	39%	33%	37%	37%	51%	44%	35%	34%	40%	45%	32%	37%	42%	33%	45%	43%
We have not experienced this	54%	55%	57%	58%	44%	51%	56%	56%	55%	48%	60%	52%	44%	58%	53%	50%
Don't Know	7%	11%	6%	5%	5%	5%	9%	11%	5%	7%	8%	11%	14%	9%	2%	7%

Which of the following, if any, have you experienced in your organisation?: AI tools that are not approved by our business for use being used by employees

BASE: All Respondents

We have experienced this	29%	26%	30%	29%	39%	31%	34%	35%	26%	31%	22%	35%	26%	31%	43%	38%
We have not experienced this	65%	68%	64%	64%	57%	64%	62%	53%	69%	59%	70%	57%	59%	62%	49%	56%
Don't Know	6%	6%	6%	6%	4%	5%	4%	11%	5%	10%	8%	9%	15%	8%	8%	7%

Which of the following, if any, have you experienced in your organisation?: Employees using personal rather than business logins to use AI tools

BASE: All Respondents

We have experienced this	36%	35%	30%	35%	38%	37%	38%	39%	36%	44%	34%	41%	35%	34%	42%	45%
We have not experienced this	56%	56%	63%	58%	56%	56%	57%	47%	58%	45%	56%	50%	52%	55%	49%	47%
Don't Know	8%	9%	7%	6%	6%	8%	5%	15%	6%	11%	10%	9%	13%	10%	9%	8%

From what you see or know, what proportion of your employees use unapproved or non-company provided AI tools for work-related tasks? This means tools which your company has not approved for use, or not provided corporate

BASE: All Respondents

None - this does not happen	30%	36%	40%	32%	22%	26%	28%	24%	30%	22%	29%	27%	33%	29%	17%	23%
Less than 10%	25%	20%	28%	26%	33%	23%	20%	31%	19%	31%	33%	29%	31%	36%	22%	20%
10%-24%	21%	18%	18%	20%	24%	28%	31%	23%	21%	21%	20%	27%	12%	18%	33%	26%
25%-49%	12%	7%	7%	11%	11%	11%	10%	11%	19%	10%	4%	13%	5%	6%	23%	16%
50% or more	5%	8%	2%	3%	7%	4%	2%	3%	4%	7%	6%	1%	2%	2%	1%	10%
Don't Know	8%	11%	5%	8%	3%	8%	8%	7%	8%	10%	7%	4%	16%	9%	3%	6%

You said that at least some of your employees are using unapproved or non-company provided AI tools. Do you have any of the following concerns about this? Select any which apply

BASE: Some employees using unapproved AI

Data leakage or security	37%	28%	36%	31%	36%	36%	45%	32%	43%	40%	31%	33%	39%	47%	42%	28%
Quality issues or inaccuracies	35%	23%	36%	31%	36%	38%	37%	30%	38%	36%	33%	36%	32%	39%	39%	43%
Non-compliance with regulations	34%	34%	29%	33%	36%	25%	38%	25%	39%	28%	31%	22%	38%	33%	34%	39%
Use of confidential company data	32%	27%	26%	30%	40%	27%	34%	36%	31%	42%	33%	31%	35%	49%	38%	42%
Employees without the necessary skills	32%	25%	27%	33%	39%	39%	42%	40%	28%	37%	39%	26%	26%	34%	29%	33%
Creation of dependence on AI	30%	29%	25%	27%	25%	26%	29%	32%	35%	25%	27%	21%	26%	25%	31%	40%
The business being too slow	22%	19%	22%	20%	27%	22%	26%	20%	24%	26%	15%	21%	12%	22%	29%	31%
N/A - I have no concerns	7%	10%	5%	9%	6%	4%	2%	2%	7%	11%	10%	6%	6%	4%	3%	3%
Don't Know	1%	1%	0%	1%	0%	0%	0%	0%	0%	0%	2%	8%	2%	0%	2%	2%
Other (Please specify)	0%	0%	0%	0%	1%	0%	0%	0%	1%	0%	0%	1%	0%	0%	1%	0%