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Unlocking AI PCs potential

How resellers can grow their devices business by meeting end user AI PC needs and opening the door to business value

SEPTEMBER 2024

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Executive summary

Separating the noise and horizon gazing from the genuine business value, here and now, is trickier than ever when it comes to AI. One area where the potential benefits are most immediate and widespread is AI PCs. Thanks to their integrated neural processing units (NPUs) and rapidly developing Microsoft Copilot and application features, they promise to put real world business advantages in the hands of entire enterprise workforces.

This white paper, featuring dedicated end user research, reveals end user plans, priorities, and needs in the space – to help resellers in the channel best support their customers in navigating these new waters. The report also explores key enterprise use cases and how they can ensure a solid business case for resellers and end user organisations alike.

The key takeaways are clear. End user organisations recognise the importance of AI PCs for their near and longer-term device strategy, but they need their channel partners to assist in identifying and unlocking the value for their workflows.

There is tacit acknowledgement that, when typical device refresh cycles are three to five years long, the device deployment decisions we make today have implications throughout that lifecycle. A degree of foresight and forward planning is required for this new but hugely promising market.

CRN surveyed over 100 endpoint estate decision makers from end user organisations, from CIOs and CTOs, to IT directors and managers. They represent a broad variety of sectors and range in size from under 500 employees to over 10,000.

Read on to help you build an informed AI PC channel strategy, unlock the potential in this nascent sector, and get ahead of the competition. ■

Key findings

28%

of organisations are either actively implementing an AI PC rollout or reviewing them as part their device refresh plans.

31%

of those surveyed agree that all new devices their organisation deploys will be AI PCs by default within two years.

76%

of organisations are either already using or testing Microsoft Copilot.

The **top 3** business departments set to benefit from AI PCs are **IT/Technology**, **Customer services** and **Marketing.**

Increased productivity is seen as the greatest benefit of AI PCs.

IT leaders need to resolve challenges around **costs**, **understanding the benefits**, and **building a business case.**

70%

of respondents agree that environmental sustainability will be a crucial pillar of their AI PC strategy.

A new market rises

Even though the AI PC market is still dawning, it is surprisingly mature given how long such products have been available. This reflects a sizable appetite amongst IT leaders, and a concerted effort on the part of vendors and channel partners to promote the value of these new devices.

> ALMOST A THIRD OF ORGANISATIONS ANTICIPATE THAT WITHIN TWO YEARS ALL NEW DEVICES DEPLOYED WILL BE AI PCS BY DEFAULT.

Just 12 per cent of organisations surveyed have no interest at all in AI PCs. Meanwhile, 10 per cent are already implementing a rollout, with a further 18 per cent reviewing devices. The remaining 61 per cent represent a large majority that confess an interest in AI PCs but with no active trialling or deployment plans.

This speaks to the opportunity and need for their channel partners to educate customers on the value proposition on offer and the importance of taking a long-term view when it comes to device refresh cycles.

Fig. 1: Current AI PC plans

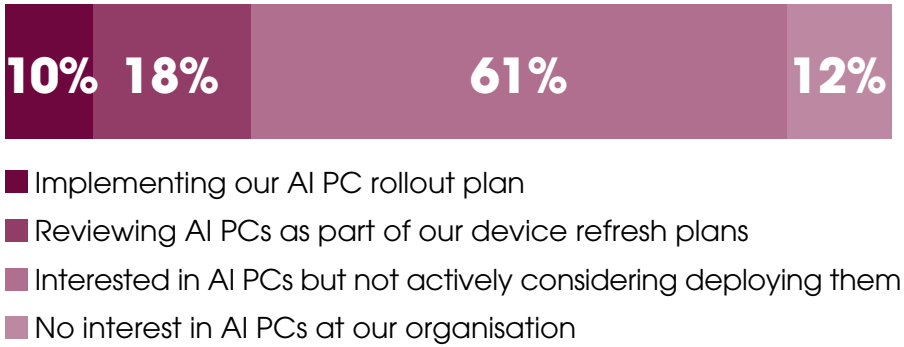
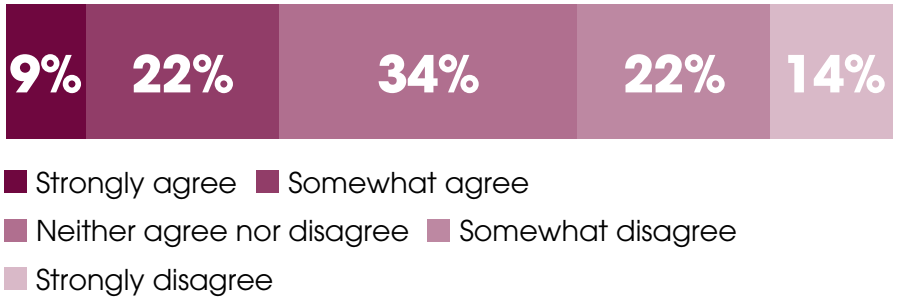


Fig. 2: "Within the next two years, all new laptops/PCs my organisation deploys will be AI PCs by default"



Taking a forward look, this long-termism is reflected in predictions for the years ahead. Almost a third of organisations anticipate that within two years all new devices deployed will be AI PCs by default – a resounding endorsement of the category becoming ubiquitous.

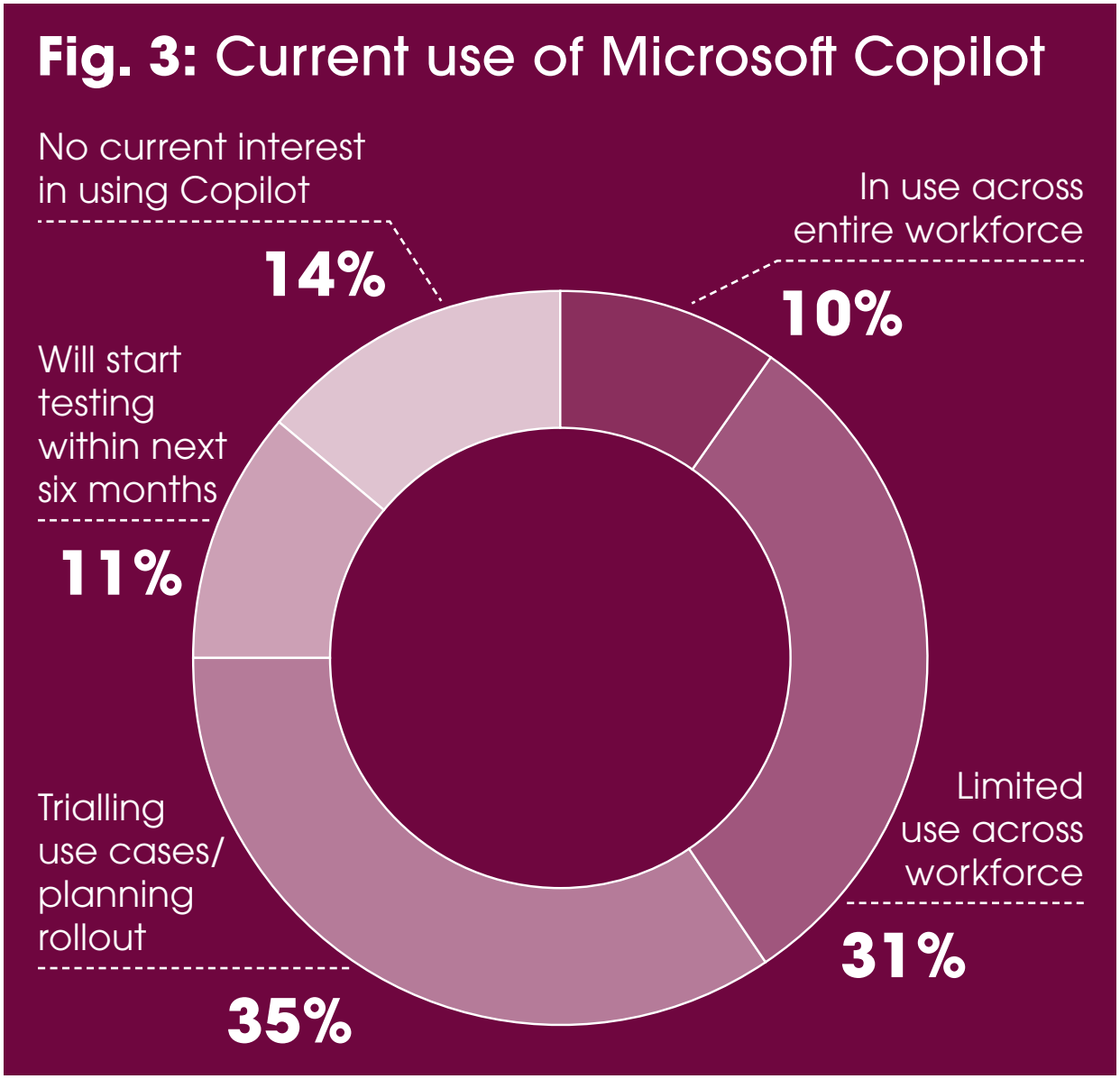
A further 34 per cent remained on the fence on the issue, suggesting it is merely a question of how long the universal transition to local AI workflows, powered by NPUs, will take, rather than a question of whether it will happen at all.

While the AI features of Microsoft Copilot are not currently dependent on the device being an AI PC, current adoption rates of Copilot indicate the market's appetite for AI capabilities employed across entire workforces. It also speaks to the importance of such AI features being well integrated into existing workflows and software ecosystems, whether that's Microsoft 365 or any number of business-critical creative, productivity, and collaboration tools.

Forty-one per cent of organisations are already using Copilot for day-to-day functions, with 1-in-10 of those surveyed doing so across their entire workforce. A further 35 per cent are either testing its use or planning a rollout. Just 14 per cent have no interest in Copilot at all. Short of their businesses having very specific reasons for neglecting the potential benefits of Copilot, it seems unwise to not keep at least one eye on its promising evolution.

Beyond Copilot, Microsoft stand to benefit from the AI PC market when it comes to their OS ambitions. Around a third of those surveyed agreed that the adoption of AI PCs and Copilot will incentivise the migration to Windows 11 at their organisation. ▸

Fig. 3: Current use of Microsoft Copilot



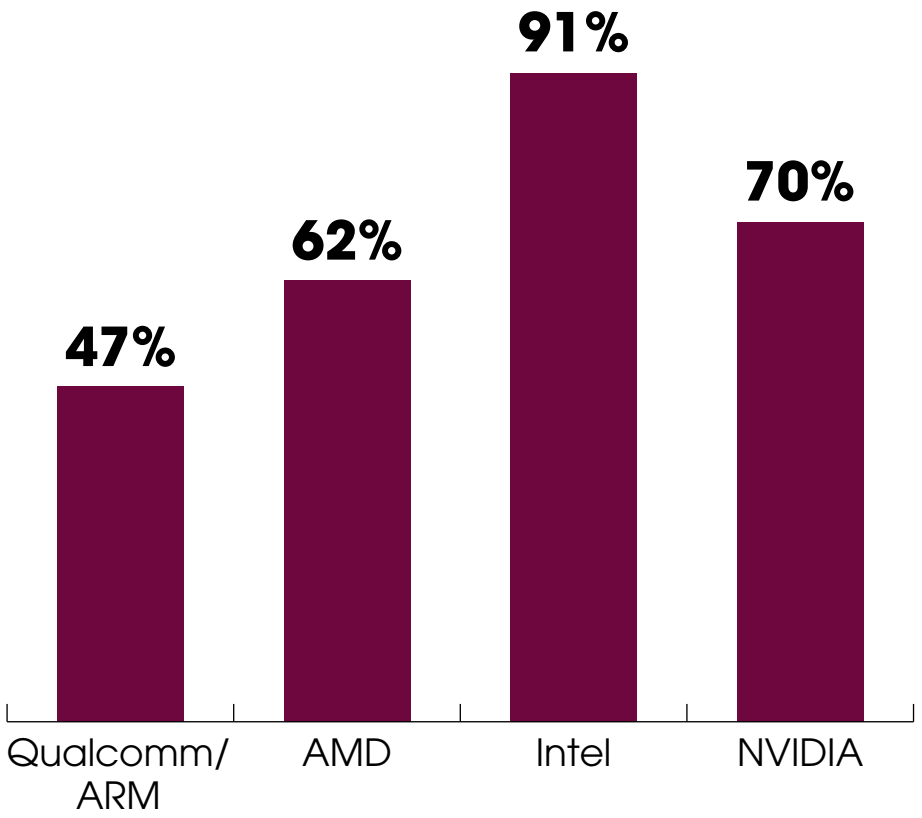
So far, we've examined AI PCs and market appetites at a top level. However, specific hardware platform vendors and device OEMs will play a key role in the value proposition and success of the segment.

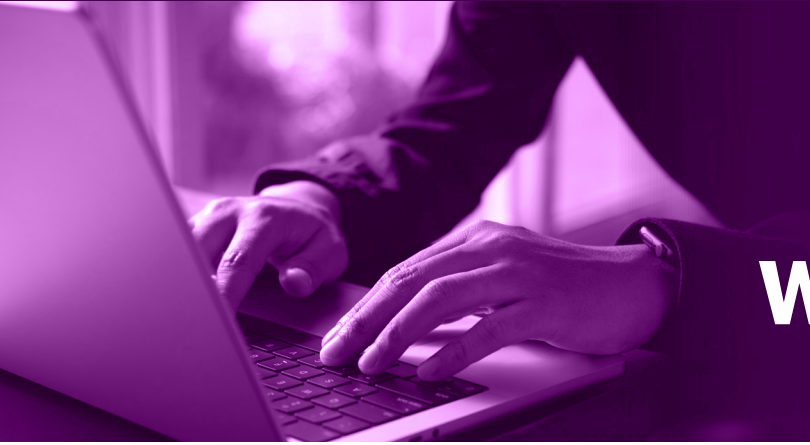
When asked which of the four leading semiconductor vendors they would consider when specifying AI PC deployments, respondents were generally very open minded about the underlying hardware. This burgeoning market will be vigorously contests over the next few years.

A near universal 91 per cent of those surveyed would consider Intel, followed by NVIDIA on 70 per cent, who have risen high on the rising tide of the AI hardware market. AMD, who recently launched their Ryzen AI 300 Series CPUs, would be considered by 62 percent of respondents.

Qualcomm's first generation of Snapdragon X ARM-based offerings have clearly impressed decision makers. The welcome competition to the traditional x86 ecosystem promises efficiency gains and other innovations built on a rich background in the mobile space. ■

Fig. 4: Hardware platform vendors respondents would consider for AI PC deployments





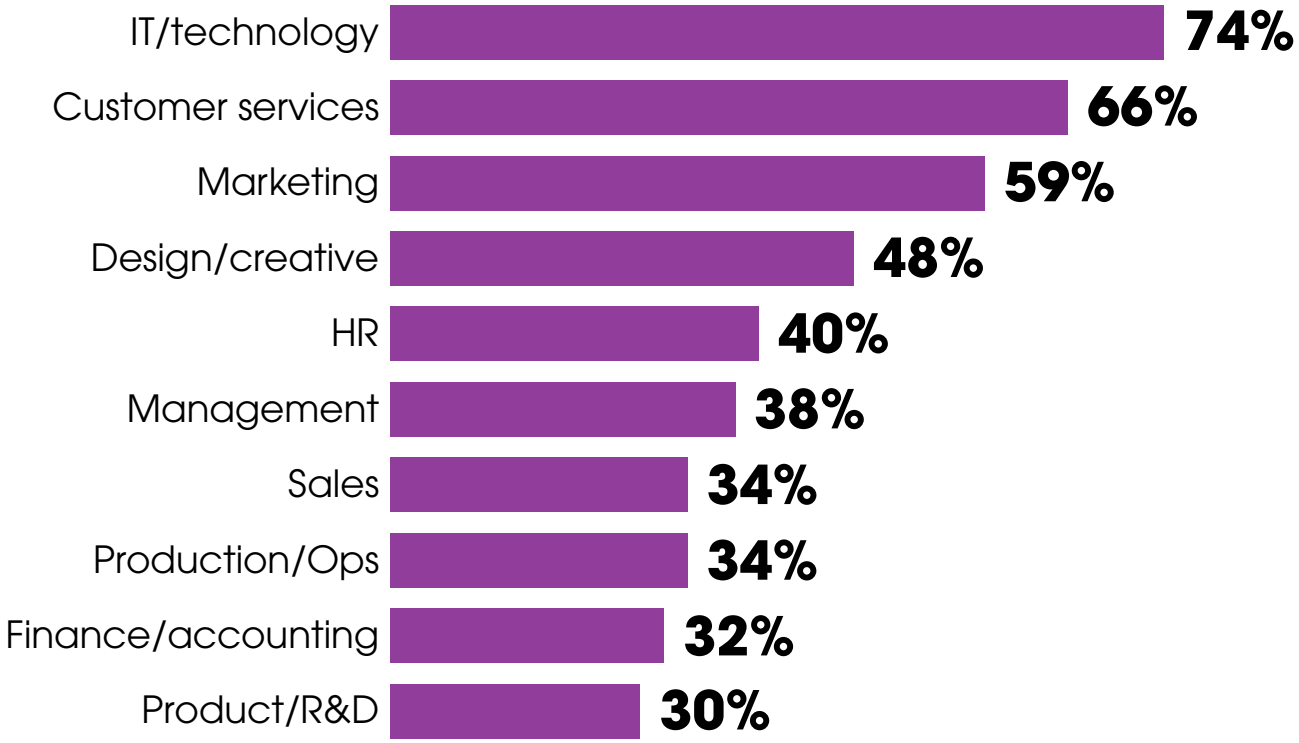
What are the use cases?

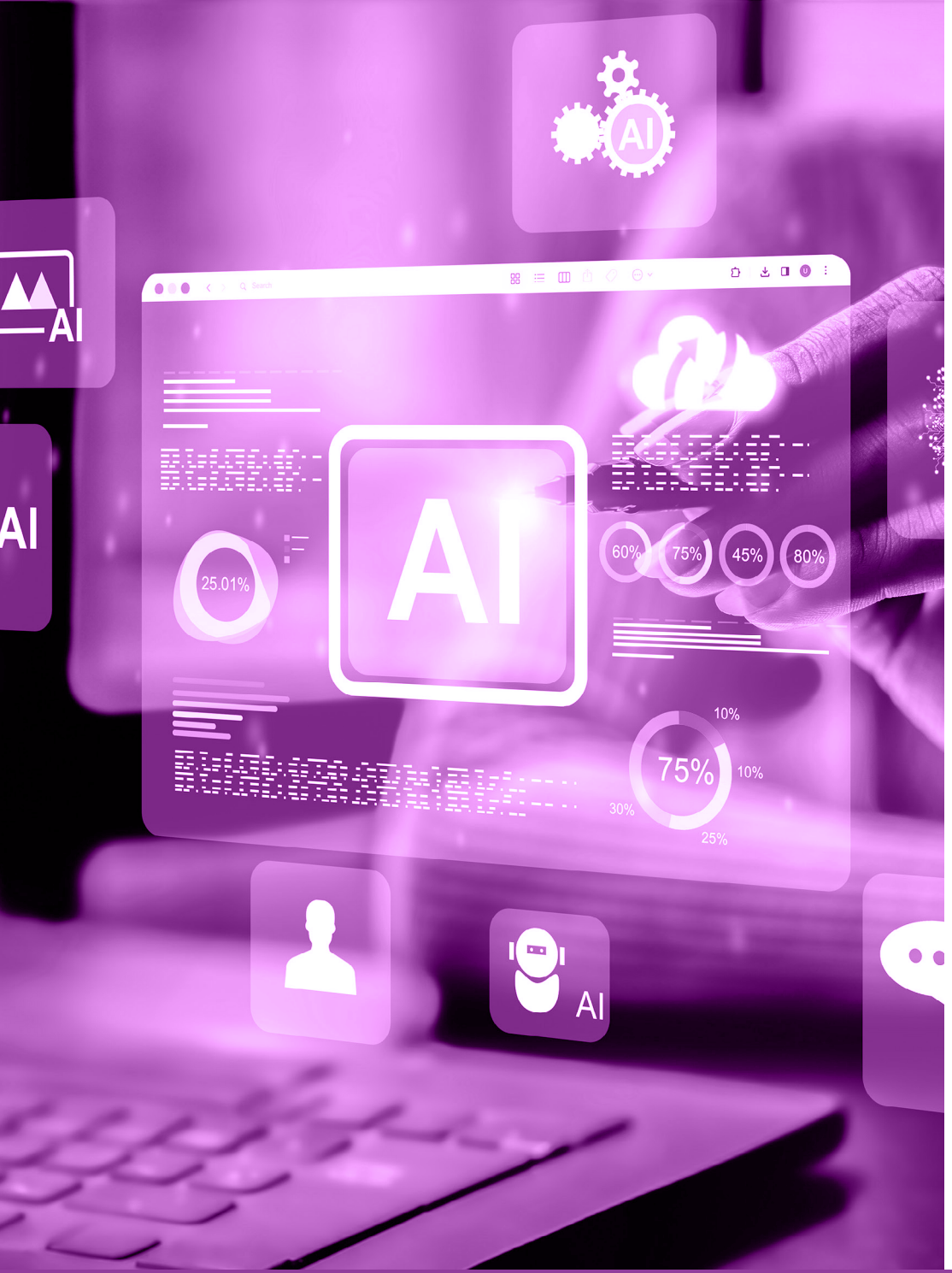
We've explored the state of the market, current plans, and sentiments around hardware. However, for end user organisations, use cases will be top of mind.

With that in mind, **CRN** asked which business departments could benefit from the provision of AI PCs. Unsurprisingly, IT and technology teams ranked highest, thanks to their existing skills and technical use cases – or, indeed, specialist AI functions.

Beyond this, customer services, marketing, and design or creative departments were seen as the most fertile soil. The former of these is often associated with the efficiencies of conversational AI or chat bots, while marketing and creative teams are best placed to leverage GenAI's ability to convincingly and rapidly render images, text and other mediums – thereby making existing processes more efficient.

Fig. 5: Business departments that could benefit from AI PC use cases





Drilling down further still into specific use cases we asked those surveyed which applications could most effectively draw on the local AI processing muscle offered AI PCs. We've distilled their open text responses into a representative selection of examples in Figure 6. ▸

Fig. 6: Applications that would benefit most from AI PCs

- Microsoft 365
- Email & meeting summaries
- Software development
- Business intelligence and advanced analytics
- Drafting HR letters & onboarding
- Customer communications
- Marketing applications
- Security monitoring
- Product design & digital twins
- ERP & finance

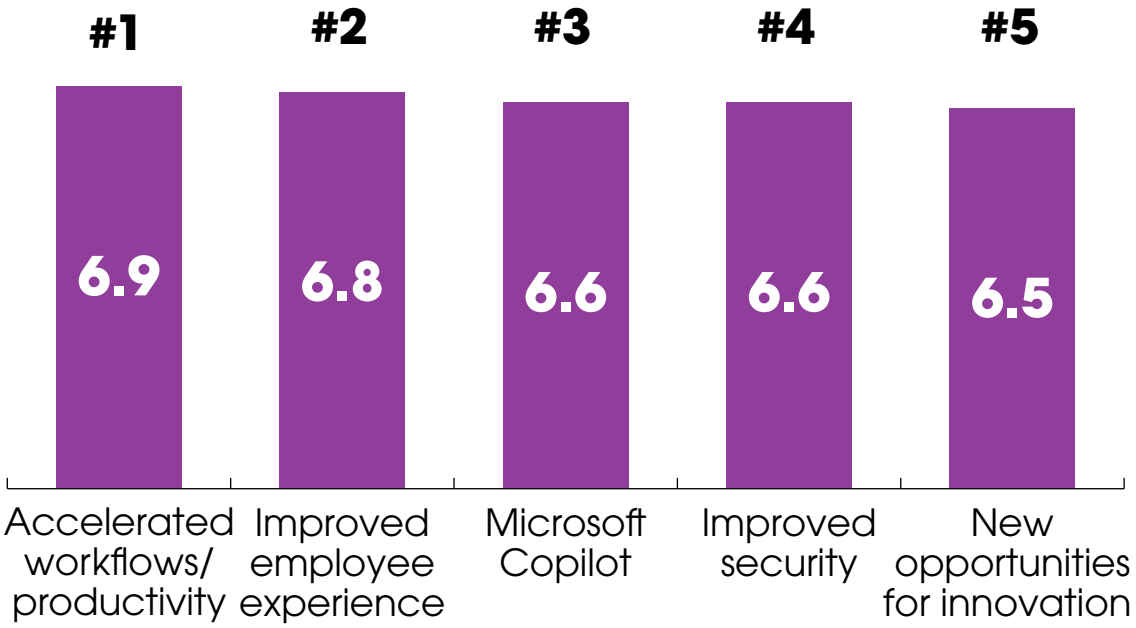
Confirming our findings so far around use cases and suitable applications, when asked to rate AI PC features in terms of how beneficial they would be to their organisations, those surveyed were most optimistic about accelerated workflows and greater productivity. This received an average score of 6.9 out of 10, with 45 per cent rating it an eight or higher.

Yet, the most noteworthy finding was perhaps 'improved employee experience', ranked second. It runs counter to traditional arguments against AI, around it usurping human-led tasks. The pervasive sentiment, according to this research, is more one of augmentation – AI PCs are geared towards allowing their users to become more productive, creative and innovative.

Wrapped around all this is the potential for greater security. With local hardware-level AI processing being able to lend its hand to the sorts of security monitoring and analysis that were previously impossible. There are also security benefits to running AI tasks locally, instead of offloading them to the cloud – minimising the attack surface and exposure to public networks. ■

Fig. 7: Top 5 AI PC features/benefits (average scores)

(1 = not at all beneficial 10 = extremely beneficial)



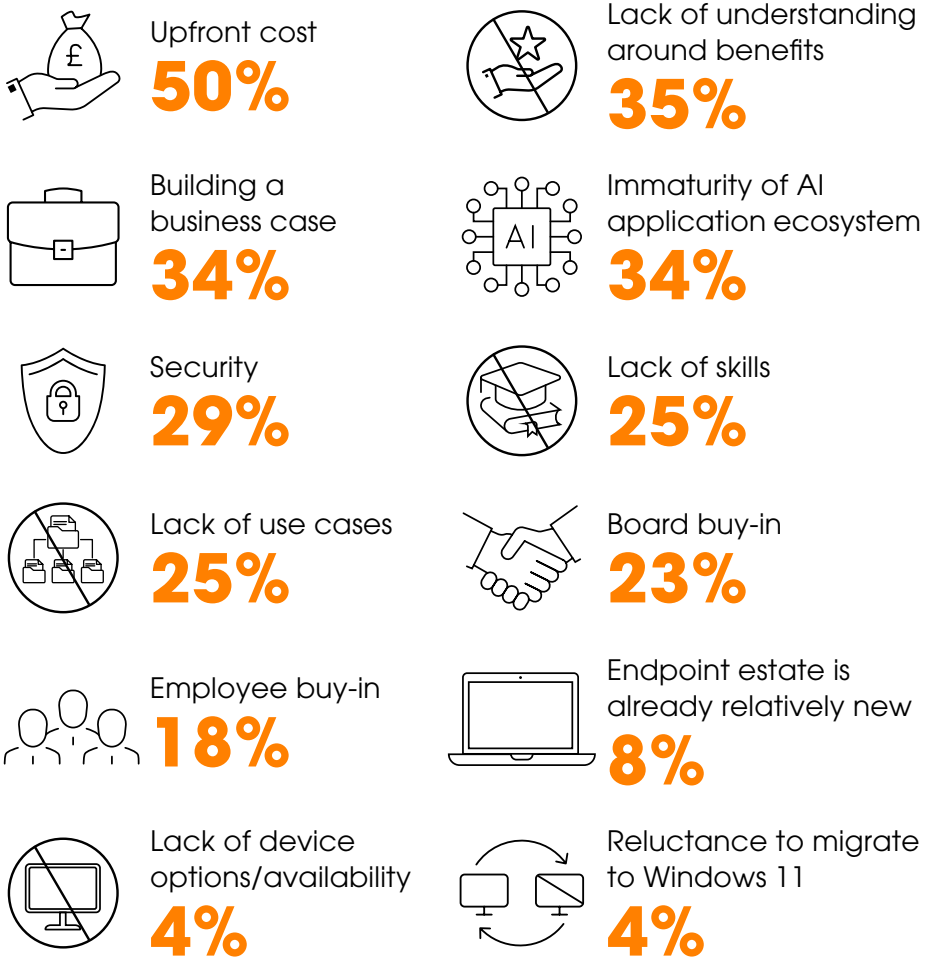
The channel challenge

Despite an awareness of the top-level benefits of AI PCs, end user organisations will need significant support from their channel partners in realising these outcomes. This is a nascent sector with several key areas through which IT leaders will need help navigating – including rollout strategy, use cases, costing, security, application development, upskilling, and stakeholder buy-in.

Upfront cost topped the table when respondents were asked to select their top three challenges. This speaks to the importance of a clearly defined business case before commencing deployment. However, it's vital that this strategy is built on a thorough understanding of the potential use cases within each specific organisation, as well as taking a long-term view of the sector.

With some organisations stretching refresh cycles to as long as five years, decision makers must recognise they are not just specifying devices for today's uses and AI ecosystem, but for next year's, and beyond. Greater upfront costs must be balanced against potential efficiency gains, competitive advantages, and unlocked innovation across that entire cycle.

Fig. 8: Biggest obstacles to AI PC adoption (3 maximum)



Value added resellers (VARs) and other channel partners will have a key role in meeting the information need here, and fostering the long-termism that many IT buyers will be lacking. When asked to what extent they agree with the statement, "It is easy to build a business case for AI PCs at our organisation," around 1-in-5 either strongly or somewhat agreed.

The statement, "The benefits of AI PCs will outweigh the additional costs within our next refresh cycle", was met with greater confidence. Almost 1-in-3 agree with this sentiment. However, a further third neither agree nor disagree. This uncertainty again hints at the roll the channel needs to play here.

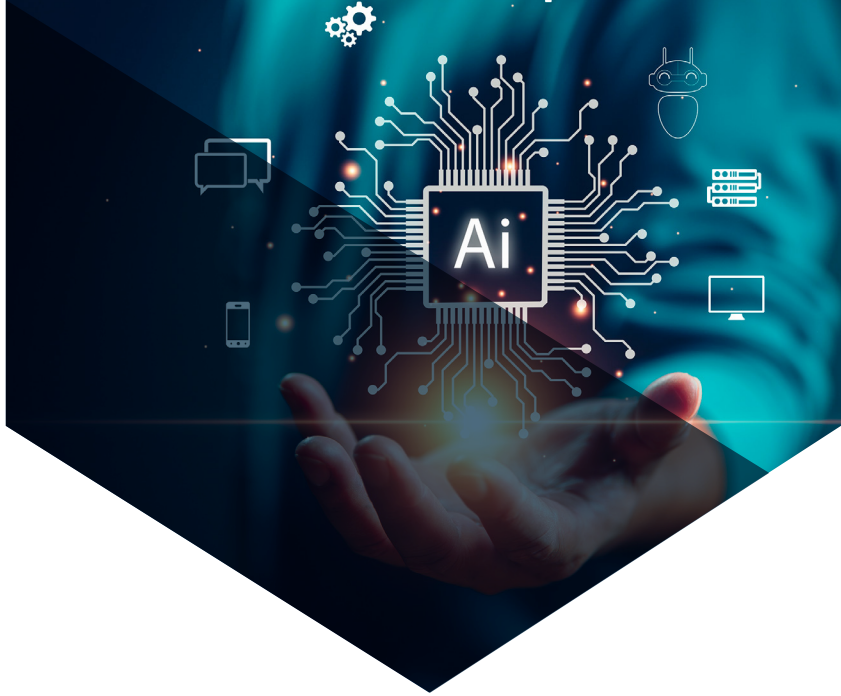
While this is a promising start in an emerging market, it leaves a significant proportion of end user organisations needing to bridge this gap.

CRN asked its audience how MSPs and resellers can help their customers' AI PC strategies. One response put it succinctly, "Outline the art of the possible. Its new to us all and we don't know what we don't know!"

Figure 9 outlines a selection of other representative replies on the following page. ■

How MSPs and resellers can help their customers' AI PC strategies

- Help convince the right people.
- Engage senior management, not just IT.
- Make sure it's value for money and does what it promises.
- Demonstrate use cases with white papers and videos.
- Promote practical benefits of AI in real-world practical scenarios.
- Offer education and continuous support through the process.
- Provide full product information to make vendor comparisons easier.
- Offer strategic advice on the selection of AI tools and platforms suited to our business needs.
- Provide better access to test devices and more detail on possible use cases for proof-of-concept.
- Help us build the roadmap and business case, and show case studies of others in our sector who are already ahead of us.



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Conclusion

The message to the channel is clear, from top-level strategy to practical applications, they have a role to play in maximising the huge promise inherent within AI PCs. IT leaders are as wary as they are excited by the promise of AI. It heralds uncertainty in its challenges as well as its benefits – and uncertainty doesn't encourage investment.

For those vendors, channel providers and end user buyers who successfully navigate this, there are substantial business-wide gains to be had. Putting AI into the hands of entire workforces promises scalable benefits as part of our regular refresh cycles. This is the low-hanging fruit of this new AI era.

Almost three-quarters of respondents agree that, "The core value and payback in AI PCs will be over the next few years, rather than at launch." In other words, the return will be within the next refresh cycle. This means IT leaders, and channel partners alike, must get on top of their AI PC strategies today, or risk missing out on the business and commercial benefits of what will surely be one of the fastest growing markets in the enterprise hardware space. ■

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