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Future-ready Workforce: The Strategic Case for AI PC Adoption

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Executive summary

AI is transforming how we work, and its potential grows exponentially when it moves from the cloud directly into the hands of end users. AI PCs, the next generation of personal computers equipped with neural processing units (NPUs)*, are making this possible. By running AI on the device itself, organizations can unlock new levels of performance, enhance security, and improve cost efficiency.

This shift raises important questions for leaders across Asia/Pacific: How quickly are organizations adopting AI PCs? What are the key trends, drivers, and challenges shaping deployment in different markets?

To provide clear, actionable answers, IDC conducted the *Asia/Pacific AI PC and Modern Workplace Research* in October 2025. The study surveyed 720 IT and business decision-makers from organizations with more than 500 employees. (See "Methodology" in the appendix for details.)

This InfoBrief presents the key findings, including popular use cases and partnership preferences, to help organizations navigate this fast-changing landscape.

Key findings

- Almost half (48%) of Asia/Pacific organizations have already deployed AI PCs, while the remainder are either piloting or considering adoption.
- Leveraging AI features on AI PCs drives significant productivity gains, saving 2.17 hours per day—30% higher than using AI on traditional PCs.
- Four out of five organizations expect AI PCs to drive agentic AI adoption in their organizations, enhancing AI security, and diversifying AI use cases.
- Most organizations are willing to pay a premium of 10% or more for AI PCs.
- While AI PCs will have the most impact in IT operations (ITOps), the next wave of adoption varies by market, spanning diverse functions from supply chain to customer service.
- The ISV ecosystem, AI performance, and enhanced security are the top three criteria when organizations select an AI PC partner.

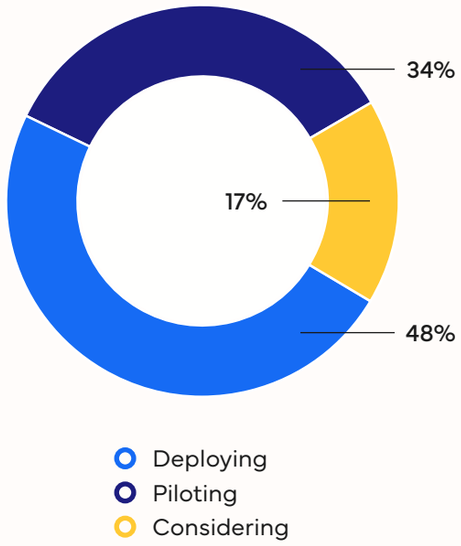
*IDC defines AI PCs as desktops or notebooks with an NPU, classifying them as 'Basic AI' if the NPU provides 1 to less than 40 TOPS, 'Gen AI' if the NPU provides 40 or more TOPS, and 'None' if the device lacks an NPU. (Source: IDC's Worldwide Personal Computing Device Tracker Taxonomy, 2025: Update, 1Q25.)

Source: IDC *Asia/Pacific AI PC and Modern Workplace Research*, October 2025, n = 720

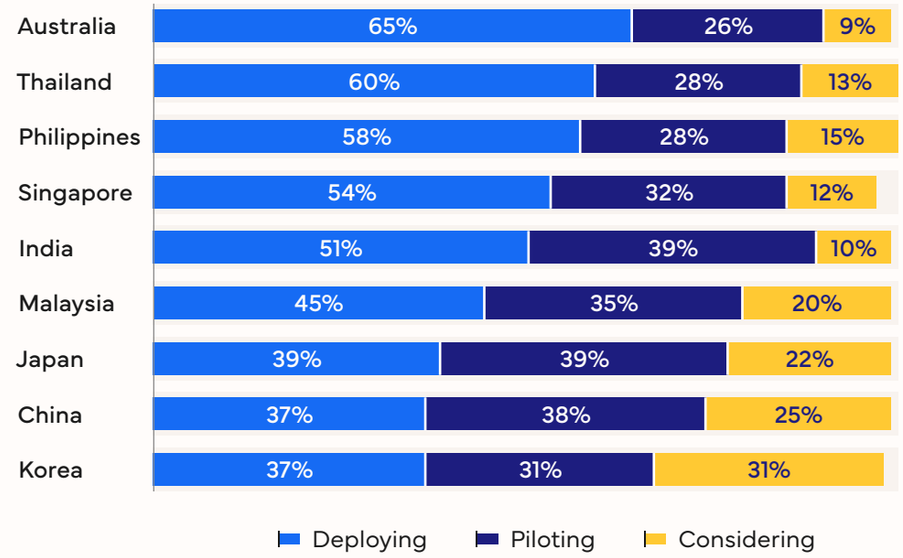
AI PCs are rapidly refreshing enterprise PC fleets across the region

Almost half (48%) of Asia/Pacific organizations with 500+ employees surveyed have already deployed AI PCs, while the remainder are either piloting or considering adoption. As manufacturers prioritize AI PC shipments and employees increasingly rely on AI tools, organizations may need to accelerate their PC refresh cycles to enhance security, reduce costs, and deliver superior employee experiences powered by AI PCs.

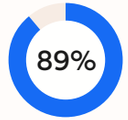
AI PC adoption in Asia/Pacific



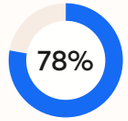
State of AI PC adoption by market



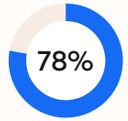
Top drivers of AI PC adoption



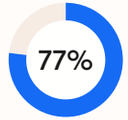
of ITDMs consider AI capabilities as very important criteria for their ***next wave of PC purchase.***



consider ***the security benefits of AI PCs*** to be very or extremely compelling.



consider ***the personalized user experience of AI with AI PCs*** to be very or extremely compelling.



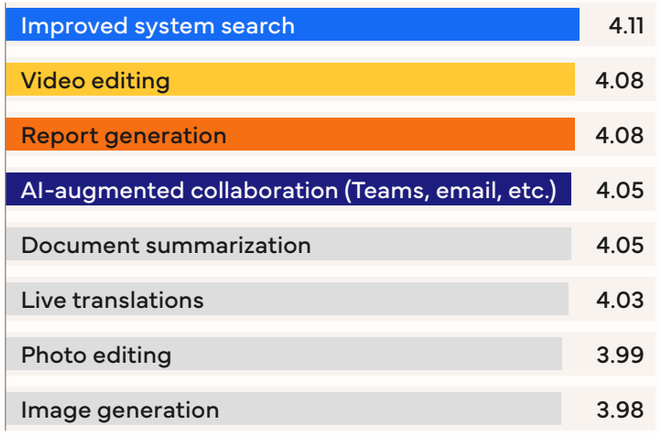
consider ***the cost benefits of running AI locally*** to be very or extremely compelling.

Source: IDC *Asia/Pacific AI PC and Modern Workplace Research*, October 2025, n = 720

AI PCs unlock a range of compelling enterprise use cases

With AI-powered PCs, employees can go beyond traditional job role boundaries — streamlining routine tasks, automating processes, and even taking on responsibilities that once required specialized expertise. From creating high-quality marketing assets, to accelerating research and reporting, AI PCs are reshaping skills and roles in the workplace. At the same time, they enrich employee communication through AI-augmented collaboration, fundamentally transforming the work experience.

How compelling are each of these AI PC use cases?
1 = not compelling, 5 = extremely compelling



IMPROVED SYSTEM SEARCH

Natural language search

- Processes natural language queries locally for faster, more relevant, and personalized search results
- Enhances privacy and security by keeping sensitive data on the device

VIDEO EDITING

Democratizing video editing

- Streamlines video editing tasks like content tagging, brand detection, and visual effects
- Empowers all users, from professionals to amateurs, and from various business functions (e.g., marketing, HR, logistics)

REPORT GENERATION

Supercharging research

- Enables report generation from diverse sources (papers, documents, emails, databases)
- Provides real-time insights and visualization, while ensuring data security and confidentiality through local AI processing

AI-AUGMENTED COLLABORATION

Envisioning the future of collaboration

- Delivers real-time transcription, translation, and summarization of meetings on-device for more inclusive and efficient communication
- Enables instant task assignments and contextual recommendations

Source: IDC *Asia/Pacific AI PC and Modern Workplace Research*, October 2025, n = 720

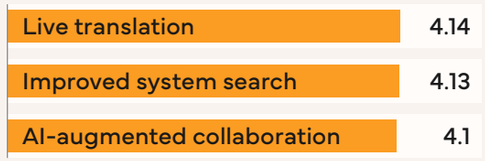
AI PCs revolutionize industry-specific workflows

AI is transforming entire industries, and AI PCs accelerate this evolution by embedding powerful capabilities directly on user devices to deliver fast, secure, and scalable processing — enabling hybrid workflows, real-time translation, multimodal content creation, and privacy-sensitive applications.

Web/Tech

AI PC adoption rate

Top 3 AI PC use cases*



Workflow orchestration examples

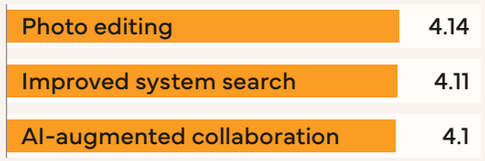
Multilingual tech collaboration

AI-powered live translation improves multilingual communication in virtual collaboration and learning environments — enhancing inclusivity and productivity while enabling tech companies to localize products, documentation, and support.

FSI

AI PC adoption rate

Top 3 AI PC use cases*



Workflow orchestration examples

Advanced financial verification

AI photo editing streamlines document verification and fraud detection by instantly enhancing, analyzing, and authenticating financial images and IDs — accelerating secure transactions and compliance processes.

Higher education & government

AI PC adoption rate

Top 3 AI PC use cases*

Workflow orchestration examples

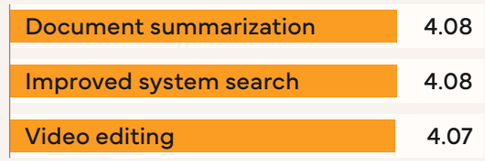
Smarter public services

AI PCs empower educators and government staff to rapidly edit videos, generate reports, and refine photos — improving productivity, communication quality, and accessibility across public services.

Retail

AI PC adoption rate

Top 3 AI PC use cases*



Workflow orchestration examples

In-store inventory management

AI PCs can process visual data from in-store cameras to monitor shelf stock levels, detect misplaced items, and alert staff for immediate restocking, all while keeping sensitive customer and operational data secure on the device.

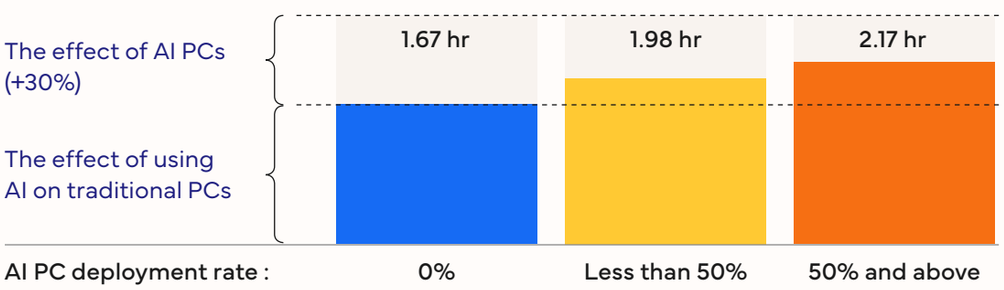
* Use cases are measured on their attractiveness to organizations with 1 = not compelling, 5 = extremely compelling.

Source: IDC *Asia/Pacific AI PC and Modern Workplace Research*, October 2025, n = 720

AI PCs enhance productivity gains and accelerate ROI

While AI applications on traditional PCs save an average of 1.67 hours per employee daily, AI PCs amplify this effect significantly. Organizations with over 50% AI PCs in their fleet report daily time savings of 2.17 hours per employee — a 30% increase in productivity. This acceleration, combined with the cost benefits of on-device AI processing, empowers organizations to scale productivity faster and achieve a quicker return on AI investments.

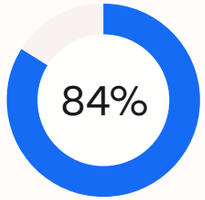
AI PC productivity benefits: Time saved per employee (hours daily) using AI features (by AI PC deployment rate)



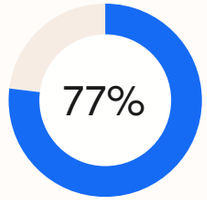
Accelerating AI ROI with AI PCs → Productivity gains | Cost reduction

AI PCs reduce the cost of enterprise AI by:

- Offloading AI workloads from cloud to local devices, cutting inference and data transfer costs.
- Enabling faster AI deployment and scaling without heavy investments in centralized infrastructure or costly hardware upgrades.
- Lowering compliance and data governance costs by keeping sensitive information on-premises, simplifying regulatory requirements.



of ITDMs agree that AI PCs reduce the cost of agentic inferencing.



consider the cost benefit of local AI to be very compelling.

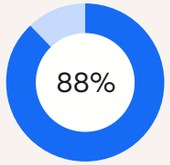
Source: IDC *Asia/Pacific AI PC and Modern Workplace Research*, October 2025, n = 720

AI PCs securely accelerate the workforce's agentic transition

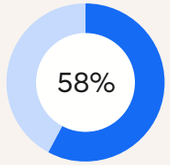
AI PCs give organizations the confidence to deploy agentic AI securely. By combining on-device AI processing with strong governance and transparent oversight, they deliver better, more consistent experiences for both office and remote employees*. As AI tools become more common, IT leaders should proactively equip their workforce with secure, governed AI PCs. This approach ensures controlled, compliant AI use while reducing the risks that come from unauthorized solutions.

Higher risks of a hybrid workplace

AI usage in hybrid work environments heightens the risks of data leakage, unauthorized access, and compliance challenges, especially as unmanaged AI tools and remote endpoints complicate security monitoring and policy enforcement.



of respondents already have a hybrid work policy, or plan to implement one within the next 24 months.



prioritize cybersecurity awareness as the top reskilling program.

Agentic AI secures the future hybrid workplace

4 out of 5 Asia/Pacific organizations

- expect AI PCs to drive agentic AI adoption in their business.
- agree that AI PCs improve control and security for agentic AI applications.

Agentic AI with AI PCs

- Enables secure, local automation of complex tasks and personalized agentic AI, enhancing user experience and productivity for both in-office and remote employees.
- Strengthens data privacy and compliance by keeping sensitive information and agent actions on-device, reducing exposure to cloud-based threats and supporting sovereign AI requirements.
- Lowers operational costs and the need for IT support through autonomous device management and efficient, on-device agentic reasoning.

*Agentic AI is an application pattern that leverages LLMs and other AI models for autonomous behaviors such as reflection, tool use, planning, or multi-agent collaboration. While typically requiring significant cloud or server compute, advances in quantization now enable agentic applications to run locally on high-end AI PCs (e.g., PCs with NPUs delivering 40+ TOPS). Client-side agentic applications do not replace full enterprise agentic systems but can redistribute AI workloads in a hybrid architecture.

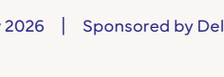
Source: IDC *Asia/Pacific AI PC and Modern Workplace Research*, October 2025, n = 720

AI PCs drive collaboration and advance enterprise AI

AI PCs enhance individual productivity and support innovative collaboration, while serving as a crucial component of a future-ready enterprise AI architecture. By advancing on-device AI capabilities, organizations can adopt a hybrid approach where AI workloads are intelligently distributed across cloud, edge, and endpoint devices. This strategy complements centralized cloud AI — ideal for model training and orchestration — by bringing inference and agentic AI tasks closer to the data source, enabling faster decision making and greater efficiency.

AI-equipped individual

of ITDMs agree that AI PCs will increase employee productivity.



of ITDMs agree that AI PCs will enhance employee creativity.

AI-led collaboration

Voices of ITDMs

"It feels like an enormous boost to productivity to see AI make it easier to work together by automating scheduling and communication."

"The integration of intelligent collaboration tools with AI PCs enables smoother cross-departmental communication, real-time sharing of analytical insights, and faster decision making."

AI-fueled enterprise

IDC prediction

By 2030, 50% of enterprise AI inference workloads will be processed locally on endpoints or edge nodes, fundamentally reshaping how organizations design, secure, and manage their AI infrastructure in support of business agility and regulatory requirements.

Sources: IDC *Asia/Pacific AI PC and Modern Workplace Research*, October 2025, n = 720; IDC *FutureScape: Worldwide Connected Devices 2026 Predictions*, Oct 2025

Organizations are prepared to invest in AI PCs to modernize the workplace

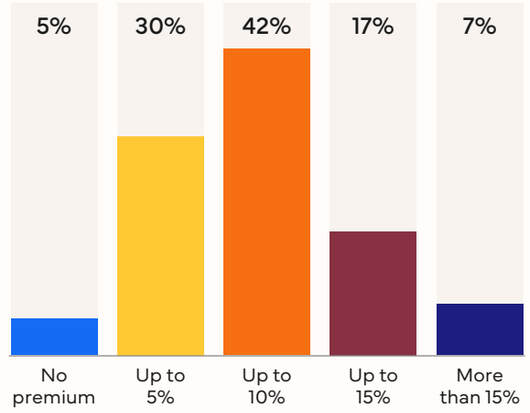
Modern workplaces powered by agents boost employee productivity and drive innovation, but they also bring security challenges and necessitate device refresh investments. Organizations understand that postponing the adoption of AI PCs exacerbates security vulnerabilities, increases operational costs, and contributes to growing technical debt. To mitigate these risks and future proof their workforce, **65% of Asia/Pacific organizations are prepared to invest a 10% or higher premium** in AI PCs as part of their PC refresh cycle.

Top 3 risks of not using AI PCs

- Increased security vulnerabilities and compliance failures
- Operational inefficiency and cost escalation
- Increased technology debt and modernization barriers

Expected impact of AI PCs (next 12-24 months)

What premium organizations are willing to pay for AI PCs



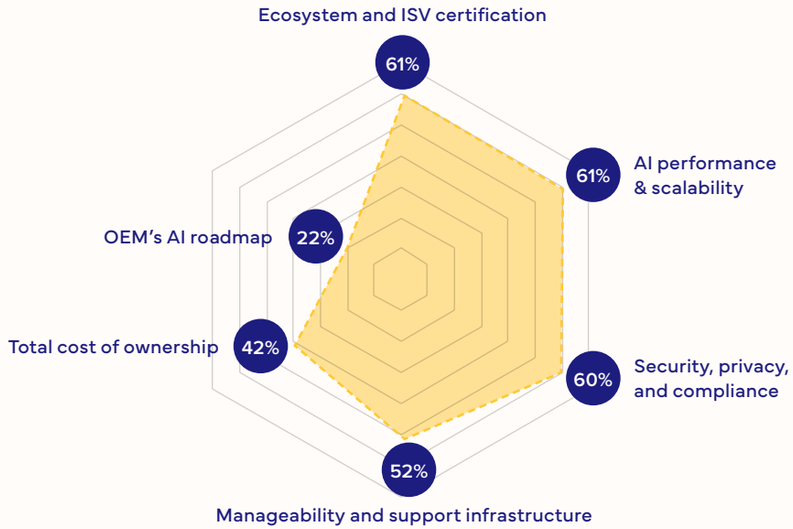
Note: The percentages denote those Asia/Pacific organizations that selected each category.

Source: IDC *Asia/Pacific AI PC and Modern Workplace Research*, October 2025, n = 720

Organizations prioritize ISV ecosystem to drive secure AI PC management and advanced use cases

When selecting an AI PC partner, organizations across the Asia/Pacific region prioritize a strong ISV ecosystem, powerful AI performance, and robust security. These criteria align with how partners can help enterprises accelerate AI PC adoption: through comprehensive management solutions, advanced enterprise applications, and strengthened security measures. Achieving these outcomes depends on seamless collaboration between software partners and hardware manufacturers to deliver truly integrated and effective solutions.

AI PC vendor selection criteria for Asia/Pacific organizations



(Note: the % in each criterion denotes the percentage of organizations which selected it as one of their top three criteria.)

Top 3 ways partners can help organizations accelerate AI PC adoption

1 AI PC management and deployment tools	Automate AI PC provisioning, updates, and integration, enabling efficient scaling and collaboration across all work environments.
2 Industry-specific AI applications and use cases	Drive AI PC adoption by enabling real-time analytics, privacy-preserving processing, and workflow automation across sectors like banking, retail, and healthcare.
3 Enhanced AI security and compliance capabilities	Automate risk management, privacy, and regulatory monitoring for AI PCs across all environments.

Source: IDC *Asia/Pacific AI PC and Modern Workplace Research*, October 2025, n = 720

Australia Insights

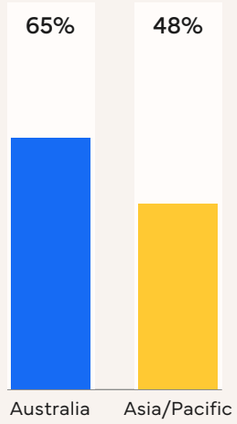
Australia leads the Asia/Pacific region in AI PC adoption, with 65% of organizations already deploying these devices to drive productivity, security, and innovation across business functions through on-device AI capabilities.

To build on this momentum, Australian organizations should focus on key next steps: continuously upgrading to the latest AI PCs, investing in workforce training, and modernizing operations. Combined with strengthening security and working with trusted partners, these efforts will deliver long-term value and support a future-ready digital strategy.

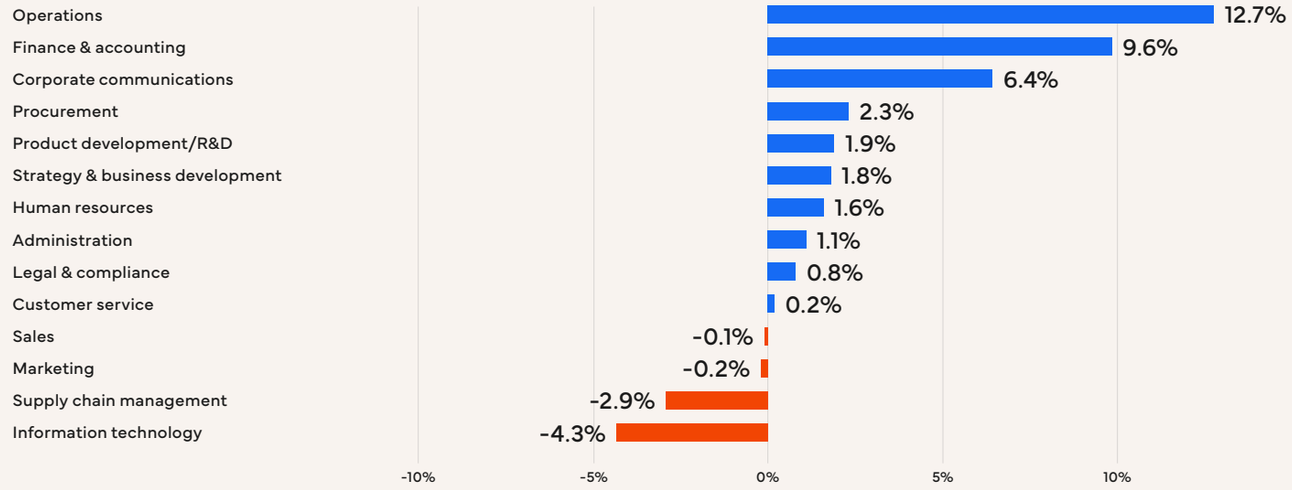
Leading enterprise AI transformation with AI PCs

Australia stands out as a regional leader in AI maturity in Asia/Pacific, with the majority of organizations embedding AI at the core of their digital strategies. This leadership is reinforced by an impressive AI PC deployment rate — 65% of organizations are deploying AI PCs, **23% above the Asia/Pacific average**. Broad integration of AI PCs enables organizations to harness cutting-edge on-device AI capabilities, driving significant improvements in productivity, security, and operational efficiency across all functions.

State of AI PC adoption: Australia vs Asia/Pacific



AI PC deployment by department: Australia vs the Asia/Pacific baseline



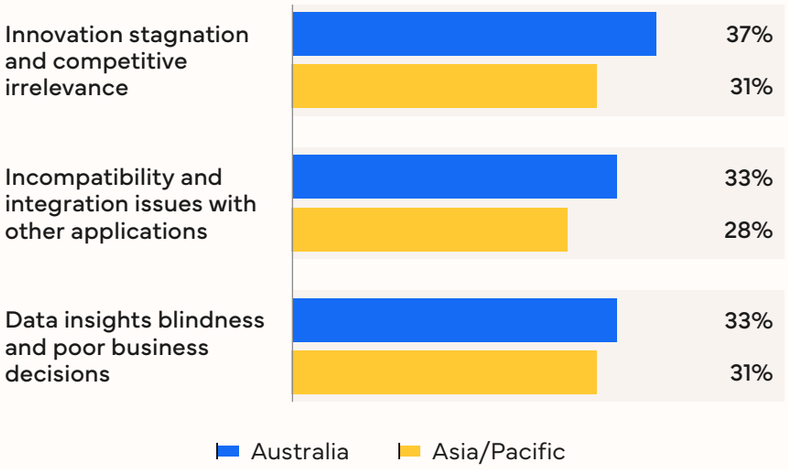
Enterprise-wide AI PC: Australian organizations are accelerating AI PC deployment across multiple business functions, outpacing their Asia/Pacific counterparts.

Source: IDC *Asia/Pacific AI PC and Modern Workplace Research*, October 2025, n = 100 Australia

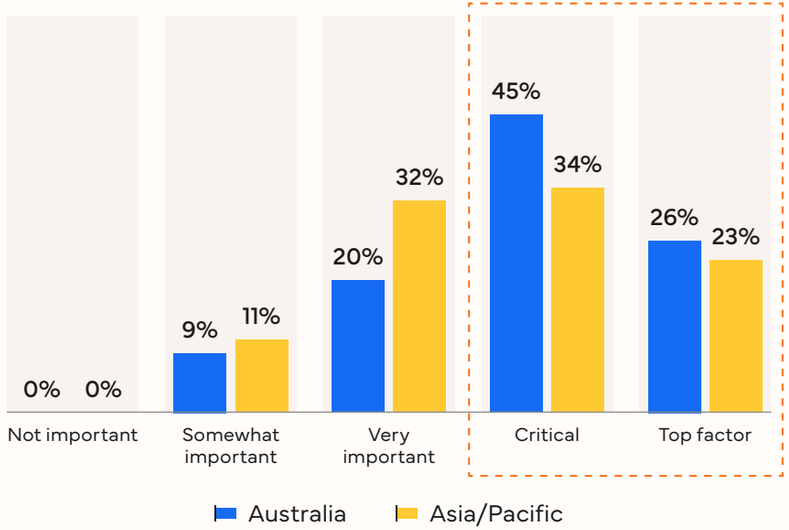
Invest in AI PCs to avoid innovation stagnation

Delaying AI PC upgrades can lead to innovation stagnation and increased compatibility issues with enterprise applications. Recognizing these risks, a majority of Australian organizations (71%) are now prioritizing AI capabilities as the most important or a critical criterion when planning their next PC purchase cycles. This proactive approach underscores their commitment to remaining competitive and ensuring their IT infrastructure remains agile and future ready.

Top risks of not using AI PCs



Importance of AI capabilities in the next wave of PC purchasing



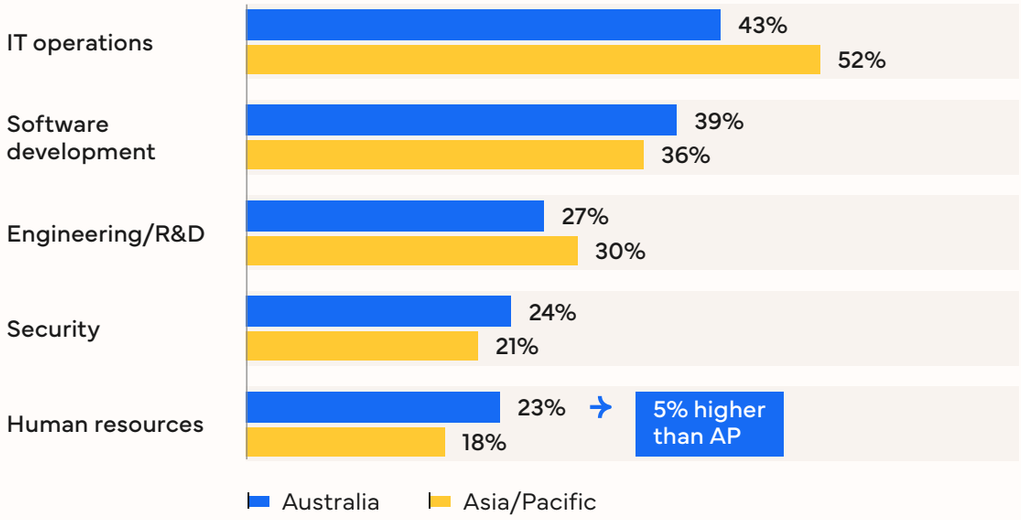
Organizations taking AI capabilities as the top or critical factor in their next PC purchasing: Asia/Pacific 57%, Australia 71% (+14% higher than the Asia/Pacific average)

Source: IDC *Asia/Pacific AI PC and Modern Workplace Research*, October 2025, n = 100 Australia

AI PCs: A catalyst for organizational transformation

AI PCs are set to transform key areas like IT operations, software development, and engineering/R&D, creating new opportunities for business innovation. In Australia, organizations also anticipate a significant impact on human resources, with expectations for HR transformation 5% higher than the regional average. This focus shows a strong commitment to empowering their people, recognizing that investing in human capital is essential to leading the way in an AI-driven future.

Top business functions expected to be most impacted by AI PCs in Australia



IT operations

Area expected to be most impacted by AI PCs in Australia

- Enable real-time, on-device troubleshooting and predictive maintenance
- Automate diagnostics and reduce IT support tickets
- Streamline security monitoring and software updates
- Improve device management efficiency

HR

Top emerging impact area in Australia (+5% higher than the Asia/Pacific average)

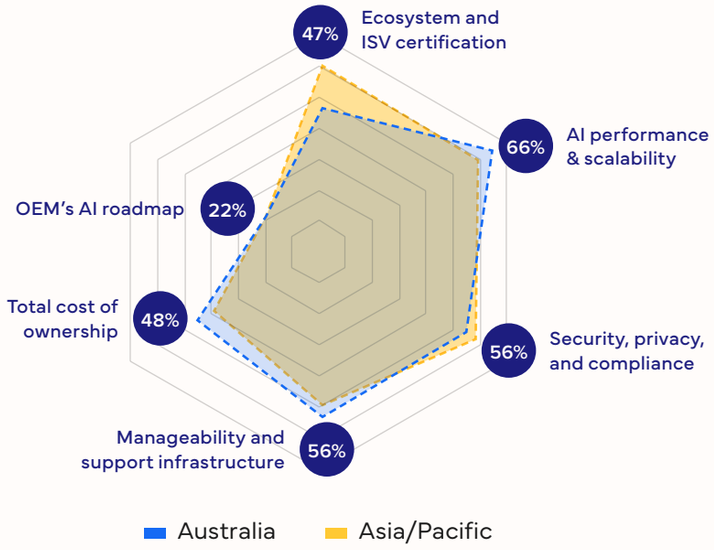
- Analyze resumes locally for faster, more secure candidate selection
- Transcribe interviews in real time and provide sentiment analysis
- Automate onboarding and document processing with on-device AI agents
- Recommend tailored training programs based on employee skill assessments

Source: IDC *Asia/Pacific AI PC and Modern Workplace Research*, October 2025, n = 100 Australia

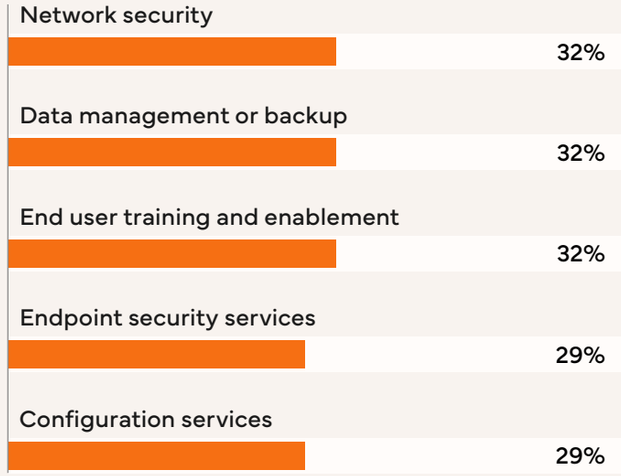
Training, security, and support: Key to AI PC deployment

Australian organizations, like their Asia/Pacific peers, prioritize AI performance and scalability when selecting AI PC partners. Manageability and security are also critical factors, with many anticipating that security vendors will soon mandate AI-capable devices. To maximize productivity and ROI, organizations also recognize the need for end-user training support to ensure their teams are equipped to excel with these advanced tools.

Top AI PC vendor selection criteria in Australia



Top 5 additional support services Australian organizations expect from their AI PC partners



AI-driven security requires modern hardware

As GenAI enables advanced threat detection and response, security vendors are embedding deep learning and real-time analytics into endpoint solutions — placing greater demand on on-device compute power delivered by NPUs in AI PCs. By 2027, IDC projects that 15% of enterprise PCs will run AI-powered security applications like deepfake detection locally, making legacy devices obsolete for modern security standards.

Source: IDC *FutureScape: Worldwide Security and Trust 2026 Predictions*

Source: IDC *Asia/Pacific AI PC and Modern Workplace Research*, October 2025, n = 100 Australia

Recommendations for Australian organizations

Lead enterprise AI transformation with AI PCs

Australian organizations should accelerate AI PC adoption, invest in workforce upskilling, and partner with trusted vendors to boost productivity, security, and innovation while maximizing ROI and ensuring sustainable enterprise-wide integration.

Invest in AI PCs to stay ahead: Delaying adoption risks innovation stagnation. Accelerate transformation and avoid falling behind by adopting AI PCs — 65% of Australian organizations have already done so — to enhance productivity, security, and efficiency.

Transform core operations: On-device AI delivers far more than a simple redistribution of workloads. Deploy AI PCs to fundamentally reshape IT operations, software development, and engineering/R&D, transforming business models and sustaining a competitive edge.

Maximize ROI and control costs: Upgrade AI PC fleets to unlock greater business value through enhanced productivity, while minimizing operational costs and technical debt. Organizations with more than 50% AI PCs report a 30% higher productivity boost compared to those relying on traditional PCs.

Prioritize human capital in the age of AI: Leverage AI PCs to transform HR functions — from recruitment to employee engagement. Australian organizations expect a greater impact of AI PCs in HR than the regional average, signaling a strong commitment to human capital and future-ready talent.

Strengthen security and governance: For 56% of Australian organizations, security is the top criterion for evaluating AI PCs. Choose partners that prioritize security but do not compromise performance and support. Securing AI governance with AI PCs will also yield greater business value.

Partner for sustainable adoption: Collaborate with trusted ISV and hardware partners, and prioritize end-user enablement—identified by 32% of Australian organizations as critical to adoption—to overcome resistance and maximize the value of AI PCs across the enterprise.

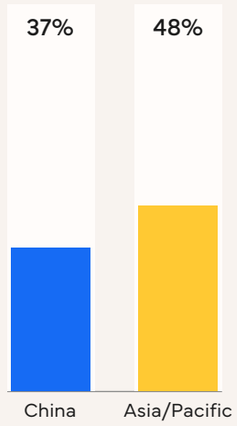
China Insights

China's AI PC adoption currently trails the Asia/Pacific average, reflecting cautious investment and legacy challenges. However, Chinese organizations are poised to accelerate deployment by prioritizing productivity, talent enablement, security, and strategic partnerships — positioning themselves to drive innovation and align with long-term AI transformation goals.

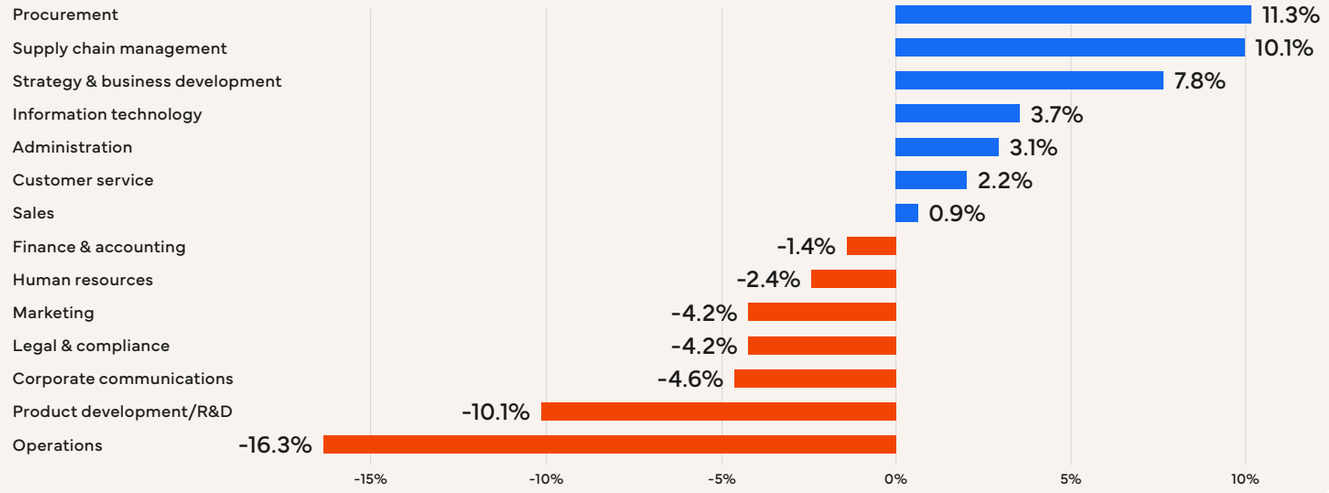
From AI leadership to endpoint innovation

AI PC adoption in China currently stands at 37%, which is **11% below the Asia/Pacific average**. Economic uncertainty and high PC inventory levels have led to more measured device refresh cycles and IT investments. However, Chinese organizations continue to make significant strides in AI infrastructure and remain global leaders in AI model research and development. As market conditions improve, China is well-positioned to accelerate the adoption of AI PCs.

State of AI PC adoption: China vs Asia/Pacific



AI PC deployment by department: China vs the Asia/Pacific baseline



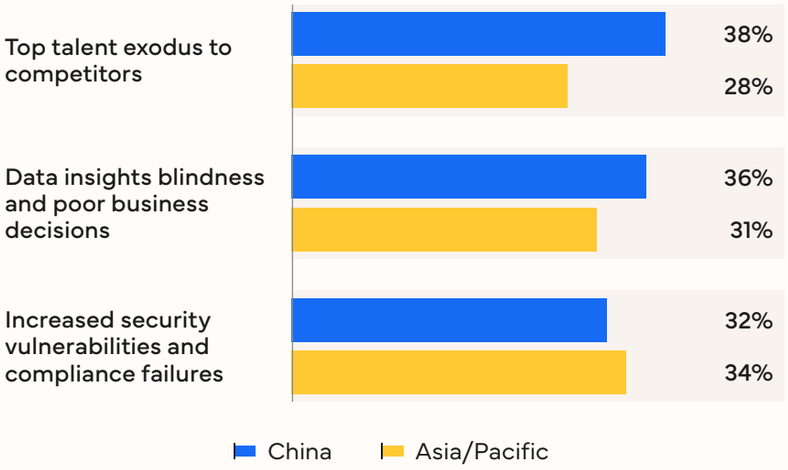
The slow pace of endpoint AI adoption, such as AI PCs, reflects the ongoing efforts of organizations to address legacy OT challenges as they work toward fully modernizing their industrial environments.

Source: IDC *Asia/Pacific AI PC and Modern Workplace Research*, October 2025, n = 100 China

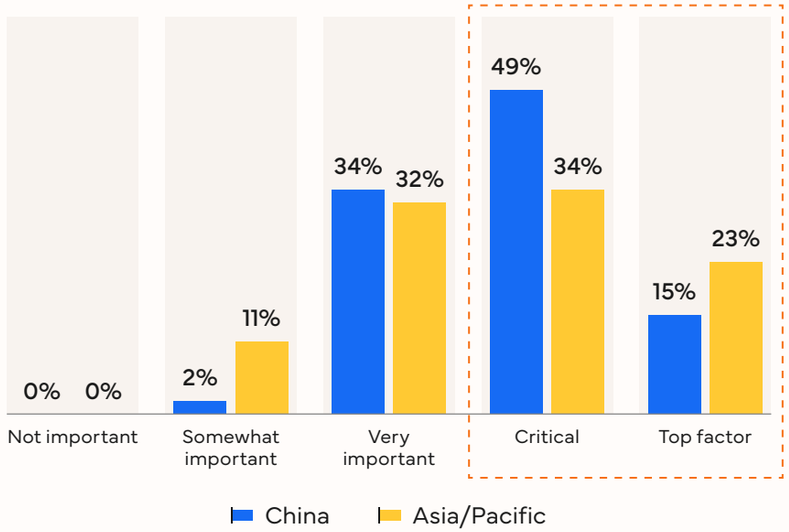
Retaining talent through AI PC upgrades

Compared to their regional peers, 10% more Chinese organizations recognize the risk to employee engagement and decision quality if AI PC deployment is delayed. To mitigate these risks and retain top talent, most Chinese organizations (64%) prioritize AI capabilities as the most important or a critical factor when planning to upgrade their PC fleets. This strategic focus underscores Chinese enterprises' commitment to leveraging advanced AI technologies to maintain a competitive edge, and drive growth.

Top risks of not using AI PCs



Importance of AI capabilities in the next wave of PC purchasing



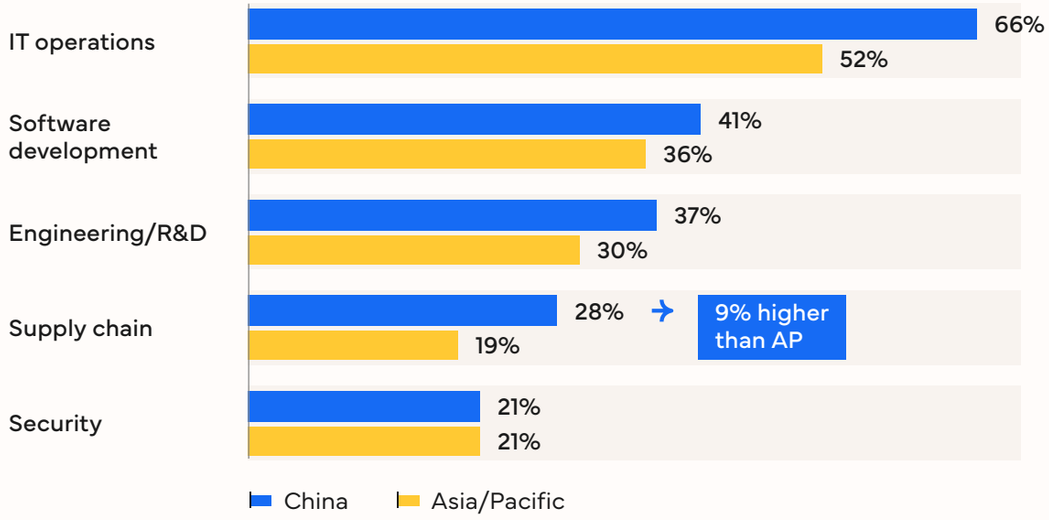
Organizations selecting AI capabilities as the top or critical factor in their next PC purchase cycle: Asia/Pacific 56.7%, China 64.0% (+7.3% higher than the Asia/Pacific average)

Source: IDC *Asia/Pacific AI PC and Modern Workplace Research*, October 2025, n = 100 China

Elevating IT and supply chain with AI-optimized devices

AI PCs are set to revolutionize IT operations, software development, and engineering/R&D, fundamentally redefining core business models. Chinese organizations also expect significant benefits in supply chain management with AI PCs — 9% above the Asia/Pacific average — highlighting their commitment to sustaining global leadership in manufacturing and supply chain through advanced endpoint AI transformation.

Top business functions expected to be most impacted by AI PCs in China



IT operations

Area expected to be most impacted by AI PCs in China

- Enable real-time, on-device troubleshooting and predictive maintenance
- Automate diagnostics and reduce IT support tickets
- Streamline security monitoring and software updates
- Improve device management efficiency

Supply chain

Top emerging impact area in China (+9% higher than the Asia/Pacific average)

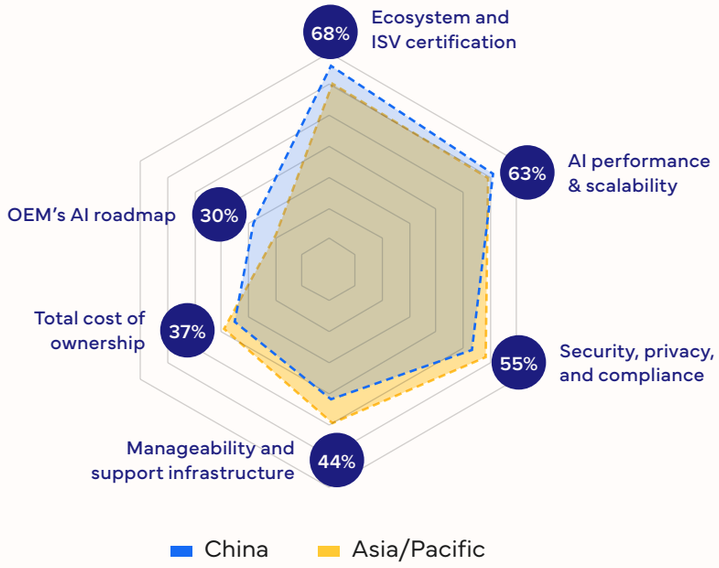
- Optimize inventory management and demand forecasting locally for faster, more accurate decisions
- Automate supplier risk assessment and compliance monitoring with on-device AI analytics
- Streamline logistics by processing real-time shipment tracking and route optimization on the device

Source: IDC *Asia/Pacific AI PC and Modern Workplace Research*, October 2025, n = 100 China

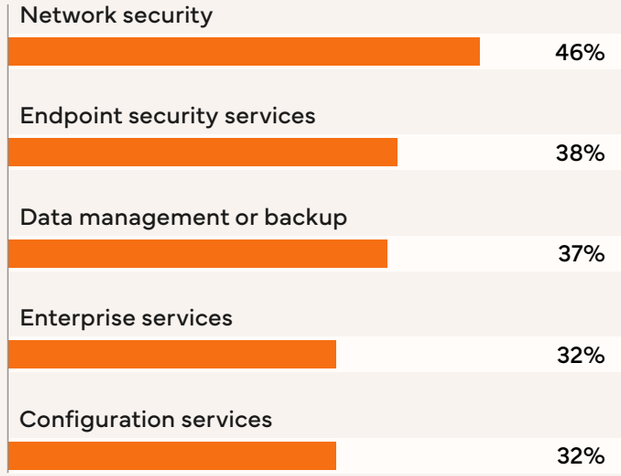
Strategic priorities shaping China's AI PC partnership strategy

Chinese organizations, like their Asia/Pacific peers, prioritize the ISV ecosystem, AI performance, and security as key AI PC partner selection criteria. Security is considered a key accelerator, with expectations that security vendors will soon mandate AI PCs. Notably, China places greater emphasis on the OEM's AI roadmap than the regional average, indicating that organizations view AI PCs as integral to a broader, longer-term AI transformation.

Top AI PC vendor selection criteria in China



Top 5 additional support services Chinese organizations expect from their AI PC partners



AI-driven security requires modern hardware

As GenAI enables advanced threat detection and response, security vendors are embedding deep learning and real-time analytics into endpoint solutions — placing greater demand on on-device compute power delivered by NPUs in AI PCs. By 2027, IDC projects that 15% of enterprise PCs will run AI-powered security applications like deepfake detection locally, making legacy devices obsolete for modern security standards.

Source: IDC *FutureScape: Worldwide Security and Trust 2026 Predictions*

Source: IDC *Asia/Pacific AI PC and Modern Workplace Research*, October 2025, n = 100 China

Recommendations for Chinese organizations

Lead enterprise AI transformation with AI PCs

Chinese organizations should accelerate AI PC adoption, invest in talent and strategic partnerships, and deploy AI PCs across core functions to boost productivity, strengthen security, optimize costs, and align with long-term AI transformation goals.

Invest in AI PCs to boost productivity: Upgrade to AI PCs to unlock significant productivity gains and future proof the workforce. Delaying adoption risks higher operational costs, greater security vulnerabilities, and loss of competitive edge in the global market.

Transform IT, R&D, and supply chain operations: Deploy AI PCs across IT, software development, engineering, and supply chain functions to automate workflows, accelerate innovation, and maintain China's leadership in manufacturing and logistics.

Maximize ROI and control costs: Expand the AI PC fleet to quickly realize productivity gains and AI ROI, while minimizing technical debt and operational expenses. Organizations with more than 50% AI PCs see up to 30% higher efficiency compared to those relying on traditional PCs.

Prioritize talent and employee enablement: Use AI PCs to prevent talent loss — a risk identified by 38% of Chinese organizations if adoption is delayed. Enhance employee engagement, decision making, and retention with AI PCs to build an innovation-driven, AI-enabled organization.

Enhance security and governance: Security is the top selection criterion (55%) and the most requested support (46%) for AI PCs among Chinese organizations. Choose AI PC providers with strong security, governance, and ISV ecosystem support to be prepared for evolving compliance and data protection needs.

Align with long-term AI strategy and partnerships: Work with OEMs and ISV partners to ensure AI PC investments fit into a broader, long-term AI transformation roadmap. Emphasize strategic partnerships and integration to support advanced use cases and sustainable enterprise AI.

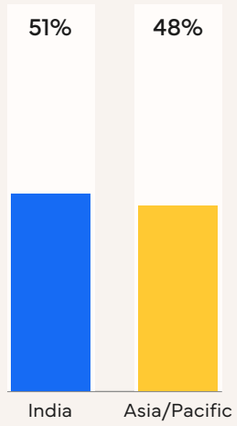
India Insights

India is emerging as a regional leader in AI PC adoption, driven by a tech-savvy workforce, strong willingness to invest in advanced devices, and a focus on leveraging NPUs for superior AI performance. With organizations rapidly integrating AI PCs across business functions and prioritizing data security, talent development, and strategic partnerships, India is well-positioned to accelerate digital transformation and sustain long-term competitive advantage.

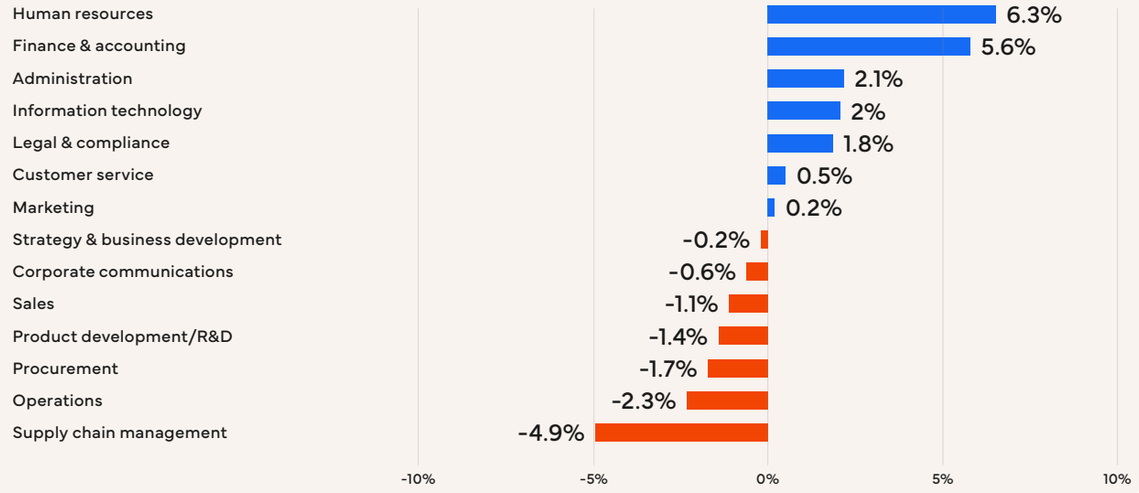
India's tech-savvy workforce fuels AI PC growth

India is rapidly advancing in AI maturity, with enterprises moving beyond pilot projects to integrate AI into core business processes. This momentum is reflected in the country's relatively high AI PC **deployment rate of 51%,** propelled by a tech-savvy workforce, a strong focus on operational efficiency, a thriving ISV ecosystem, and increasing emphasis on security and data sovereignty. Collectively, these factors position India as a regional leader in both AI maturity and AI PC adoption, driving accelerated AI-fueled digital transformation.

State of AI PC adoption: India vs Asia/Pacific



AI PC deployment by department: India vs the Asia/Pacific baseline



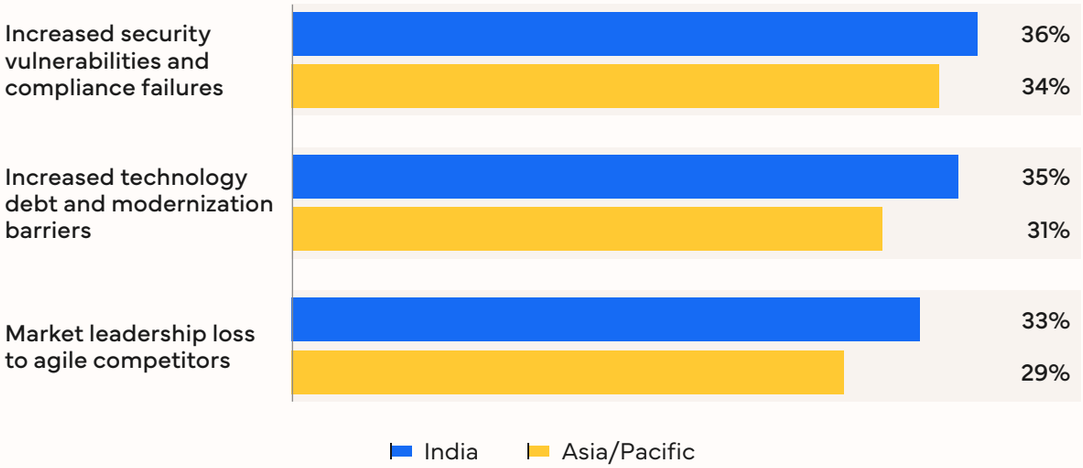
In Indian organizations, non-IT departments, such as finance and human resources, are deploying AI PCs at a rate exceeding the Asia/Pacific average. Their goal is to unlock business values of on-device, domain specific AI use cases that enhance efficiency and decision making.

Source: IDC Asia/Pacific AI PC and Modern Workplace Research, October 2025, n = 150 India

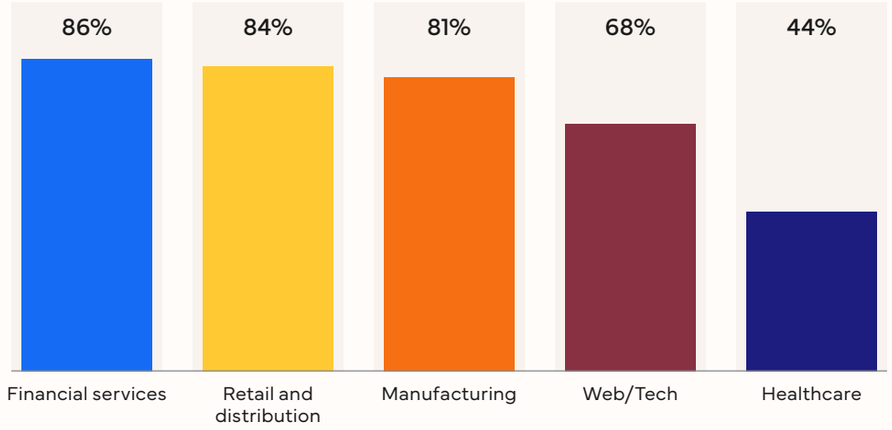
Indian organizations' willingness to invest in AI PCs varies by industry

An impressive 84% of Indian organizations believe that AI PCs will accelerate innovation, and 77% are prepared to pay at least a 10% premium for these devices. This willingness varies by industry, with financial services leading the way at 86%. Indian organizations believe that delaying AI PC adoption could lead to security and compliance issues, increased technology debt, and a loss of competitiveness and market leadership.

Top risks of not using AI PCs



Indian organizations willing to pay a premium of 10% or more for AI PCs by industry

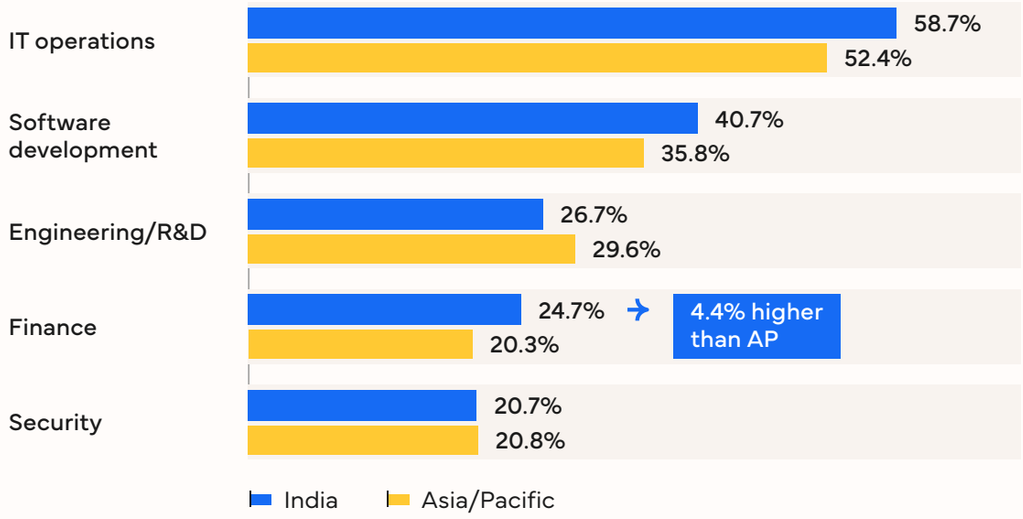


Source: IDC Asia/Pacific AI PC and Modern Workplace Research, October 2025, n = 150 India

The strategic impact of AI PCs in ITOps and finance

Indian organizations expect AI PCs to fundamentally transform ITOps, software development, and engineering/R&D, reshaping core business models across industries. They also place higher importance — 4.4% above the Asia/Pacific average — on AI in finance, recognizing its role in automating processes, improving accuracy, and enhancing risk management. AI PCs drive this change by processing financial data locally, enabling real-time fraud detection, instant reporting, and secure automation of key tasks.

Top business functions expected to be most impacted by AI PCs in India



IT operations

Area expected to be most impacted by AI PCs in India

- Enable real-time, on-device troubleshooting and predictive maintenance
- Automate diagnostics and reduce IT support tickets
- Streamline security monitoring and software updates
- Improve device management efficiency

Finance

Top emerging impact area in India (+4.4% higher than Asia/Pacific average)

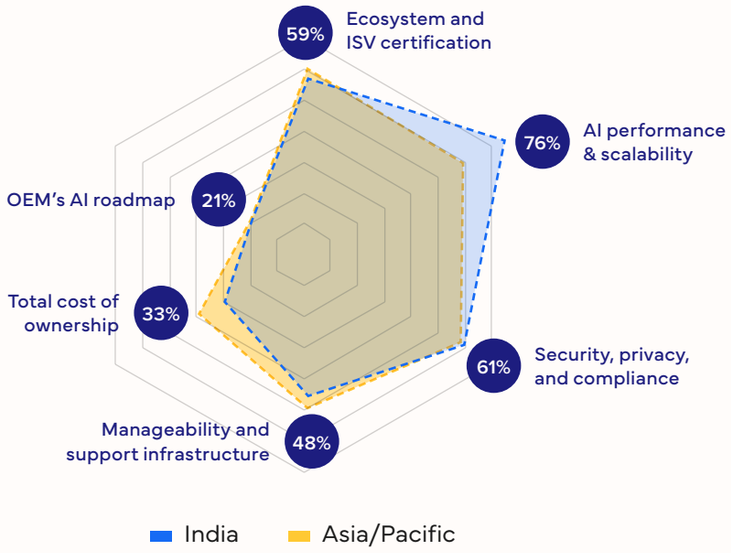
- Automate invoice processing locally for faster, more accurate reconciliation
- Detect fraud/anomalies in financial transactions in real time, improving security and compliance while keeping sensitive data on the device
- Generate financial reports instantly, enabling timely decision making and confidential analysis

Source: IDC *Asia/Pacific AI PC and Modern Workplace Research*, October 2025, n = 150 India

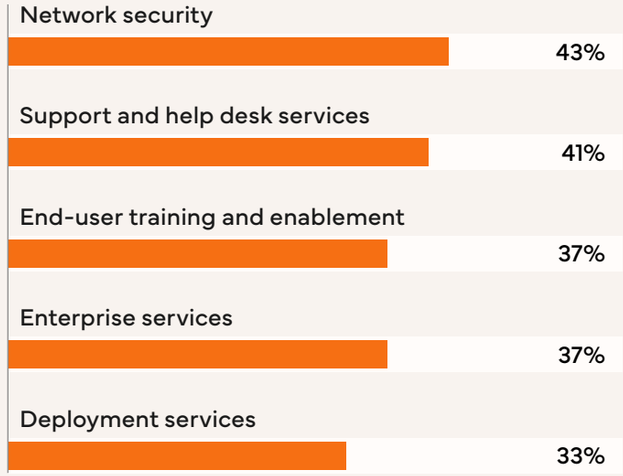
Advanced NPUs and security: Key to India's AI PC adoption

Driven by a tech-savvy culture and strong AI awareness, Indian organizations prioritize AI performance — powered by advanced NPUs — when selecting AI PC partners, with security and the ISV ecosystem close behind. They also demand robust security, support, and deployment services to speed up adoption. With rising concerns about data privacy and compliance, vendors offering advanced AI security solutions will gain a clear advantage in India's enterprise PC market.

Top AI PC vendor selection criteria in India



Top 5 additional support services Indian organizations expect from their AI PC partners



AI-driven security requires modern hardware

As GenAI enables advanced threat detection and response, security vendors are embedding deep learning and real-time analytics into endpoint solutions — placing greater demand on on-device compute power delivered by NPUs in AI PCs. By 2027, IDC projects that 15% of enterprise PCs will run AI-powered security applications like deepfake detection locally, making legacy devices obsolete for modern security standards.

Source: IDC *FutureScape: Worldwide Security and Trust 2026 Predictions*

Source: IDC *Asia/Pacific AI PC and Modern Workplace Research*, October 2025, n = 150 India

Recommendations for Indian organizations

Lead enterprise AI transformation with AI PCs

Indian organizations should harness AI PCs with advanced NPUs, invest in talent and upskilling, and deploy local AI across core functions to drive innovation, operational excellence, and data security. Strategic partnerships and optimized investments will further accelerate AI PC adoption and position enterprises for long-term success.

Harness next-generation AI PCs for the digital leap: Confidently embrace AI PCs with advanced NPUs to unlock next-level AI performance — the top criterion identified by 76% of Indian organizations — to empower the already tech-savvy workforce to achieve more in less time.

Reimagine business operations with local AI: Deploy AI PCs enterprise-wide — not only in IT but also in finance, engineering, and other departments to enable real-time analytics, secure automation, and smarter decision making — driving operational excellence in every department.

Optimize investments for long-term value: Expand the AI PC fleet to maximize productivity and cost efficiency, positioning for sustained growth. Organizations with more than 50% AI PCs see up to 30% higher efficiency compared to those relying on traditional PCs.

Make talent a competitive advantage: Invest in AI PCs and continuous upskilling to help employees automate routine tasks, take on new challenges, and foster a culture of innovation across the organization.

Safeguard data with on-device intelligence: Align with India's sovereign AI initiatives by choosing AI PC solutions that prioritize local data processing and robust network security — the most requested support (43%) for AI PCs — to ensure compliance and protect sensitive information in a hybrid work environment.

Build strategic partnerships for scalable success: Collaborate with leading ISVs and hardware providers to access tailored support, advanced security, and deployment expertise — accelerating AI PC adoption and future proofing the enterprise.

Japan Insights

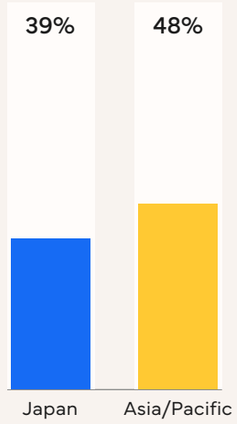
AI PC adoption in Japan remains in its early stages with 9% fewer organizations deploying AI PCs compared to the Asia/Pacific average, largely due to a strong risk-averse culture. However, Japanese organizations are acutely aware of the risks of delaying adoption — 71% are willing to pay a premium of 10% or more for AI PCs to avoid escalating operational costs and innovation stagnation.

Moreover, a growing number of Japanese companies — more so than their regional peers — see the transformative potential of AI PCs in core business functions such as engineering and R&D.

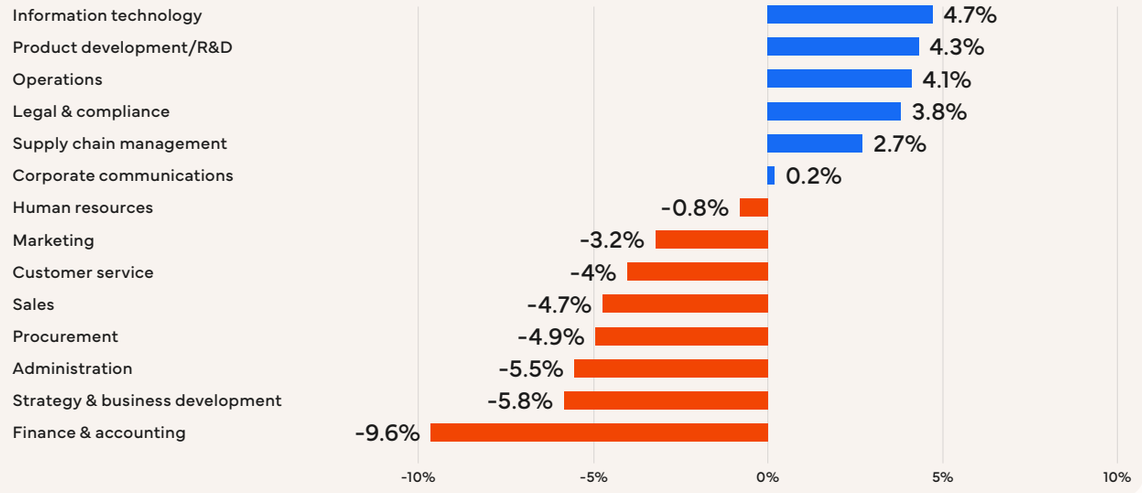
Japanese organizations lag Asia/Pacific counterparts in AI PC deployment by 9%

A culture of risk aversion and the lack of comprehensive AI strategies limit Japanese organizations' ability to scale and institutionalize enterprise AI. As a result, AI maturity is still largely in the early stages with most organizations operating at the **"AI pivot" phase** — testing and optimizing rather than fully transforming. Overcoming these challenges will require stronger AI initiatives, more aggressive reskilling, and a focus on long-term strategic thinking.

State of AI PC adoption: Japan vs Asia/Pacific



AI PC deployment by department: Japan vs the Asia/Pacific baseline



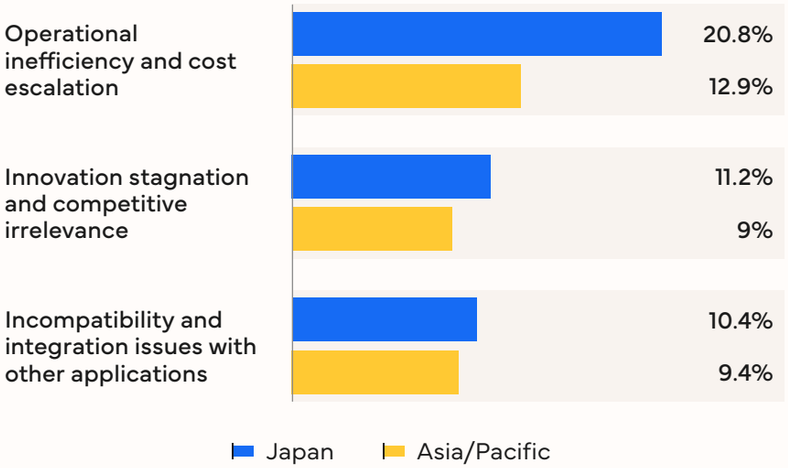
While IT-related functions in Japan have embraced AI PCs more readily than the broader Asia/Pacific region, adoption among non-IT functions falls behind, highlighting the lack of a comprehensive enterprise-wide AI transformation strategy.

Source: IDC *Asia/Pacific AI PC and Modern Workplace Research*, October 2025, n = 125

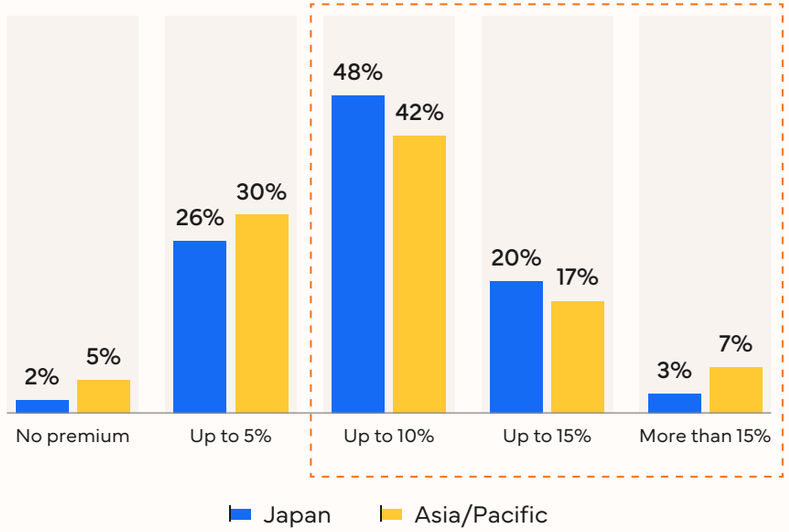
Organizations recognize risks of delaying adoption and willing to invest in AI PCs

Despite their relatively low adoption rate, Japanese organizations expressed strong concern about the consequences of not using AI PCs. In fact, 21% believe that operational costs will escalate without AI PCs — 8 percentage points higher than the Asia/Pacific average. This reflects Japan's risk avoidance culture, which acts as both a barrier and a driver — 71% of organizations are willing to pay a 10% or higher premium for AI PCs to mitigate issues such as cost escalation and innovation stagnation.

Top risks of not using AI PCs



What premium Japanese organizations are willing to pay



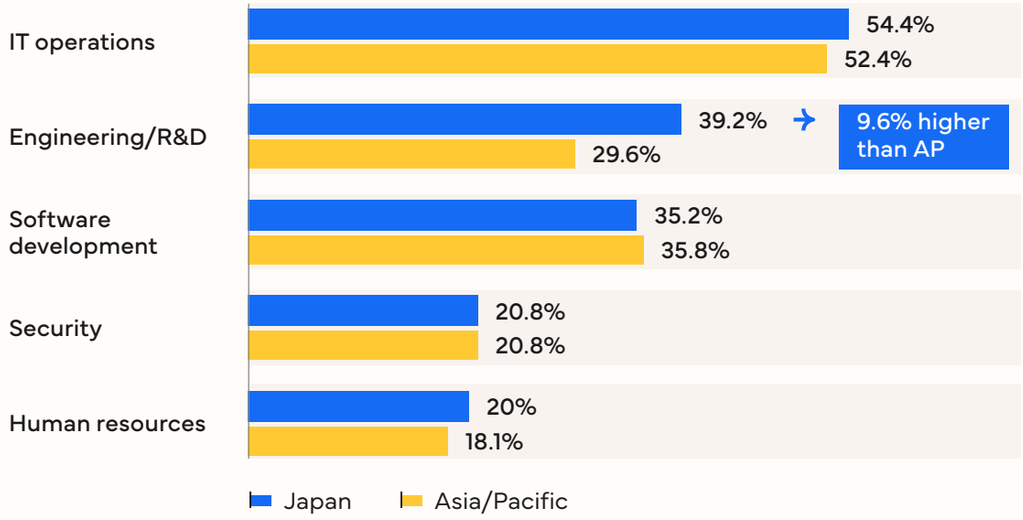
In summary, organizations willing to pay a 10%+ premium: Asia/Pacific 65%, Japan 71% (6% higher than Asia/Pacific average).

Source: IDC *Asia/Pacific AI PC and Modern Workplace Research*, October 2025, n = 125

Transforming core business functions with AI PCs

The potential of AI PCs extends far beyond individual productivity gains. While ITOps is a common focus across the region, Japanese organizations stand out for their recognition of the transformative impact on engineering and R&D — over 10% more than the Asia/Pacific average. Other functional areas, including marketing and HR, are also gaining momentum in Japan, leveraging AI PCs to deliver richer, domain-specific AI experiences.

Top business functions expected to be most impacted by AI PCs in Japan



IT operations

Area expected to be most impacted by AI PCs in Japan

- Enable real-time, on-device troubleshooting and predictive maintenance
- Automate diagnostics and reduce IT support tickets
- Streamline security monitoring and software updates
- Improve device management efficiency

Engineering/R&D

Top emerging impact area of AI PCs in Japan (+9.6% higher than Asia/Pacific average)

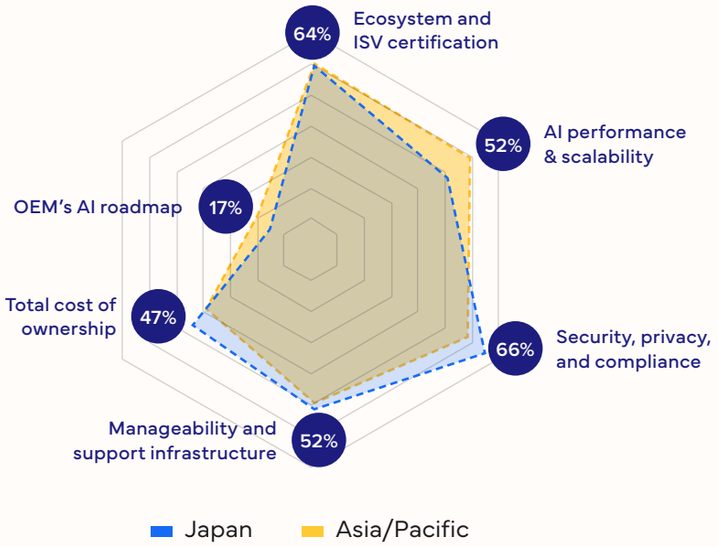
- Accelerate simulation, modeling, and data analysis with on-device AI processing
- Enable real-time design optimization and rapid prototyping
- Automate repetitive engineering tasks, freeing up time for innovation
- Improve data security by processing sensitive intellectual property locally

Source: IDC *Asia/Pacific AI PC and Modern Workspace Research*, Oct 2025

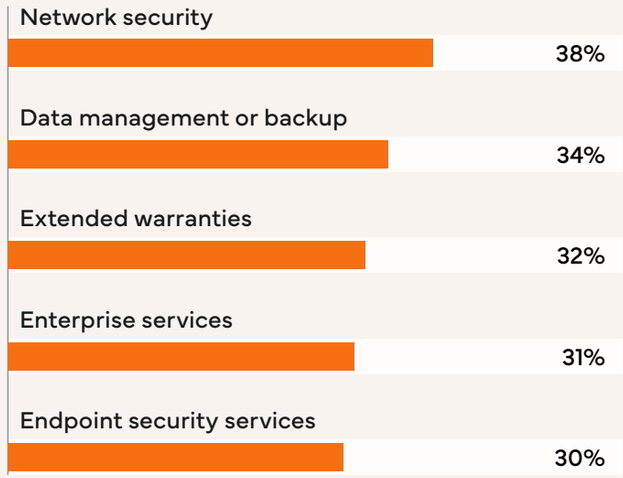
Security takes center stage in Japan

While vendor selection criteria largely align with Asia/Pacific counterparts, Japanese organizations place greater emphasis (+6%) on security, privacy and compliance. They also expect additional support in areas like network security (38%), data management (34%) and endpoint security services (30%) from their AI PC partners. Combined with hardware-based AI security from manufacturers, a robust, expansive ISV ecosystem can deliver AI-powered security applications to support zero-trust architectures.

Top AI PC vendor selection criteria in Japan



Top 5 additional support services Japanese organizations expect from their AI PC partners



AI-driven security requires modern hardware

As GenAI enables advanced threat detection and response, security vendors are embedding deep learning and real-time analytics into endpoint solutions — demanding the on-device compute power delivered by NPUs in AI PCs. By 2027, IDC projects that 15% of enterprise PCs will run AI-powered security applications like deepfake detection locally, making legacy devices obsolete for modern security standards.

Source: IDC *FutureScape: Worldwide Security and Trust 2026 Predictions*

Source: IDC *Asia/Pacific AI PC and Modern Workspace Research*, Oct 2025

Recommendations for Japanese organizations

Lead enterprise AI transformation with AI PCs

Japanese organizations should adopt AI PCs to boost productivity, future proof IT, enhance security and compliance, control costs, transform business functions, and maximize value through strategic partnerships and workforce upskilling.

Boost productivity and innovation: AI PCs deliver faster, more secure, and context-aware features, helping save time and drive innovation — up to 30% more time saved per day per employee compared to traditional PCs.

Enhance security and compliance: 66% of Japanese organizations prioritize security as the top criterion for AI PCs. Confidently adopt AI PCs which process data locally, strengthening privacy and compliance, and meeting Japan's strict regulatory standards.

Transform core functions: AI PCs are driving innovation across business functions, with Japanese companies deploying them in product R&D at a rate 4.3% higher than the Asia/Pacific average. As their capabilities become more evident, AI PCs are poised to revolutionize even more business areas.

Future proof IT with hybrid AI: Adopt AI PCs to support hybrid AI architectures, optimizing performance and scalability for evolving business needs. This also aligns with Japan's growing demand for secure AI infrastructure.

Control costs and reduce risks: Delaying AI PC adoption increases operational costs, as recognized by 21% of Japanese companies (8% above the Asia/Pacific average). Early adoption avoids escalating costs and other challenges such as innovation stagnation, and incompatibility issues associated with legacy systems.

Partner and upskill for success: Successful AI PC adoption requires collaboration with trusted ISV and hardware partners to deliver advanced security, management, and application support — alongside workforce reskilling to maximize enterprise-wide value.

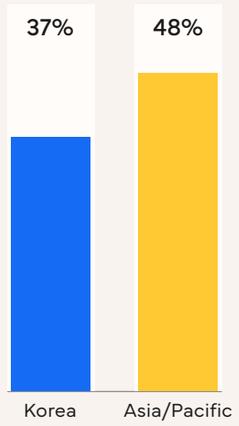
Korea Insights

While AI PC adoption in Korea currently trails the Asia/Pacific average, strong investment intent and growing interest in both back-end and customer-facing innovation signal significant future potential. Organizations increasingly prioritize security, hybrid AI architectures, and total cost of ownership, while deepening partnerships with ISVs and hardware vendors. These moves will postion Korea well to accelerate AI PC deployment and drive comprehensive digital transformation across industries.

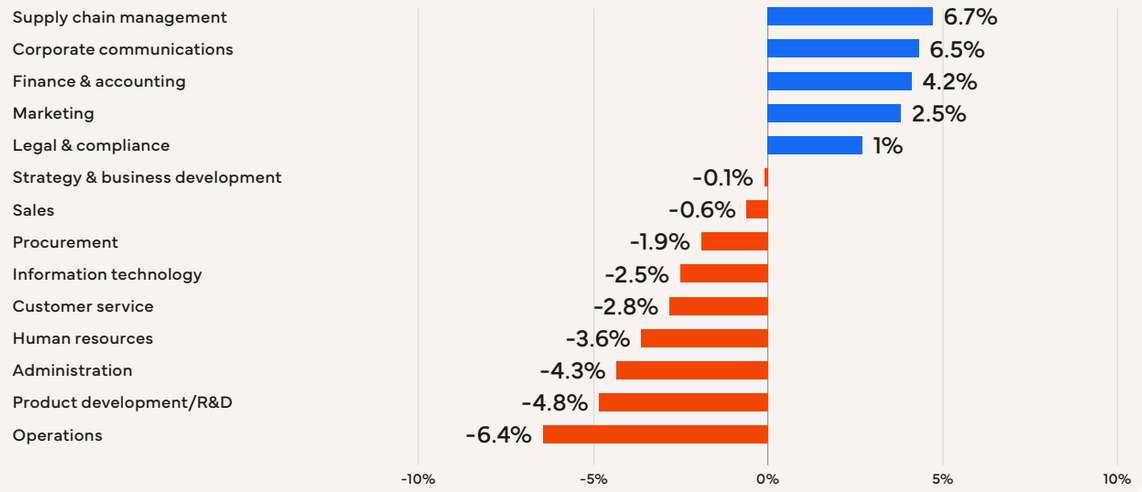
Korea's cautious approach to AI PC adoption

Although nearly all organizations are considering AI PC adoption, only 37% of Korean organizations are currently deploying them — **11% below the Asia/Pacific average.** The commercial PC market in Korea is contracting due to economic uncertainty, and most enterprises remain at the "AI pivot" stage, focusing on pilot projects rather than broader transformation. However, Korea's strong manufacturing base and growing interest in sovereign and edge AI are expected to drive future AI PC adoption, positioning the country for significant AI-driven growth.

State of AI PC adoption: Korea vs Asia/Pacific



AI PC deployment by department: Korea vs the Asia/Pacific baseline



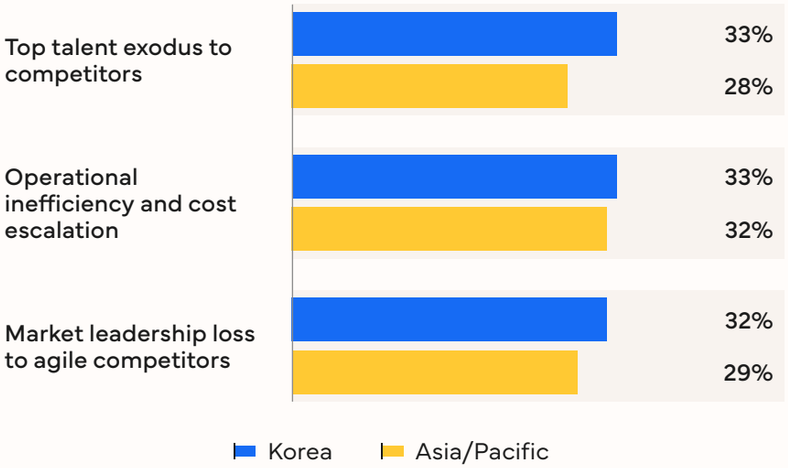
Most departments in Korea have lower AI PC adoption rates compared to the Asia/Pacific average. However, supply chain management and corporate communications stand out, with adoption rates 7% higher than the regional average. This suggests that AI PCs are gradually gaining traction across both front-end and back-end functions in Korea.

Source: IDC *Asia/Pacific AI PC and Modern Workplace Research*, October 2025, n = 75 Korea

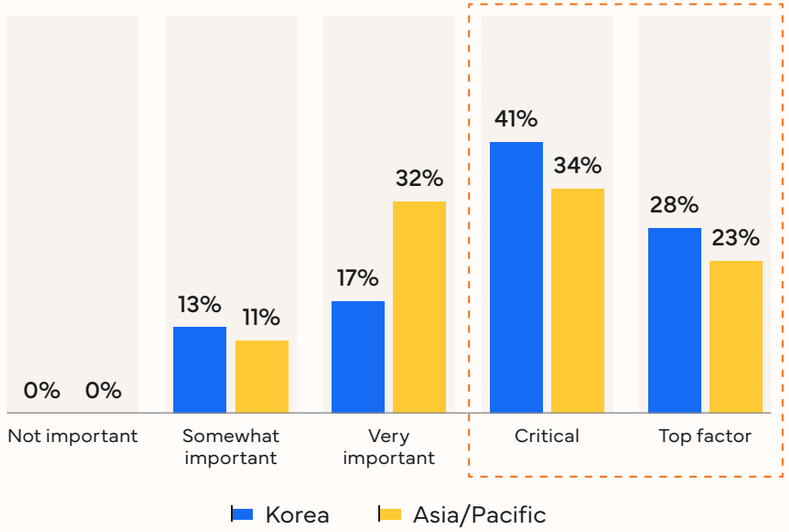
Upgrading for AI advantage: Bridging Korea's readiness gap

Korean organizations demonstrate a strong intent to accelerate AI PC adoption. More than two-thirds (69%) rank AI capabilities as the most important or a critical criterion for their next PC purchase — 13% above the Asia/Pacific average. This heightened focus reflects growing concerns around talent retention, operational costs, and competitiveness. By prioritizing AI PC investments, Korean organizations can deliver advanced, secure AI experiences for knowledge workers, and position themselves for sustained innovation and growth.

Top risks of not using AI PCs



Importance of AI capabilities in the next wave of PC purchasing



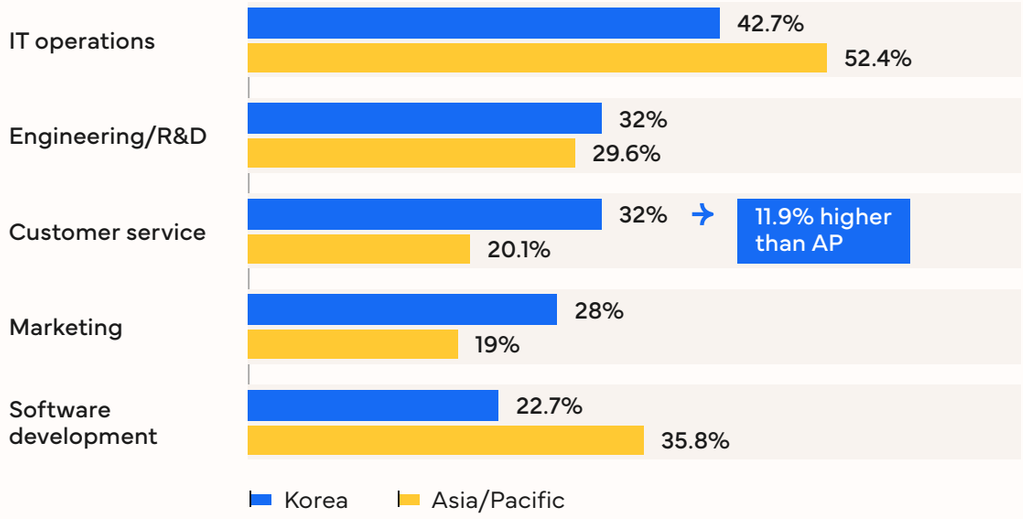
Organizations making AI capabilities the top or critical factor for their next PC purchase: Asia/Pacific 56.7%, Korea 69.3.0% (+12.7% higher than the Asia/Pacific average)

Source: IDC *Asia/Pacific AI PC and Modern Workplace Research*, October 2025, n = 75 Korea

Korea's dual focus: AI PCs for front-end and back-end innovation

Looking ahead, Korean organizations expect NPU-powered devices to transform critical areas like IT operations and engineering/R&D, potentially reshaping core business models. Interestingly, customer service ties with engineering/R&D in second place as a key future impact area. This suggests that despite slow initial deployment, Korean organizations are targeting innovation across both back-end and front-end customer-facing functions with AI PCs.

Top business functions expected to be most impacted by AI PCs in Korea



IT operations

Area expected to be most impacted by AI PCs in Korea

- Enable real-time, on-device troubleshooting and predictive maintenance
- Automate diagnostics and reduce IT support tickets
- Streamline security monitoring and software updates
- Improve device management efficiency

Customer service

Top emerging impact area in Korea (+11.9% higher than Asia/Pacific average)

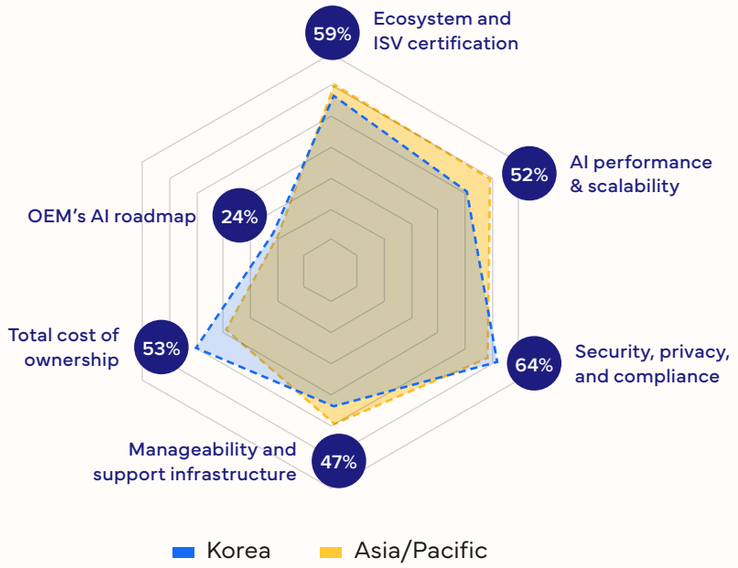
- Transcribe and analyze customer calls on-device for real-time support
- Process customer-submitted images locally to speed up issue resolution
- Generate personalized multimedia responses — such as annotated screenshots or step-by-step video tutorials
- Analyze facial expressions and voice tone during calls to gauge sentiment and adapt responses — all on-device

Source: IDC *Asia/Pacific AI PC and Modern Workplace Research*, October 2025, n = 75 Korea

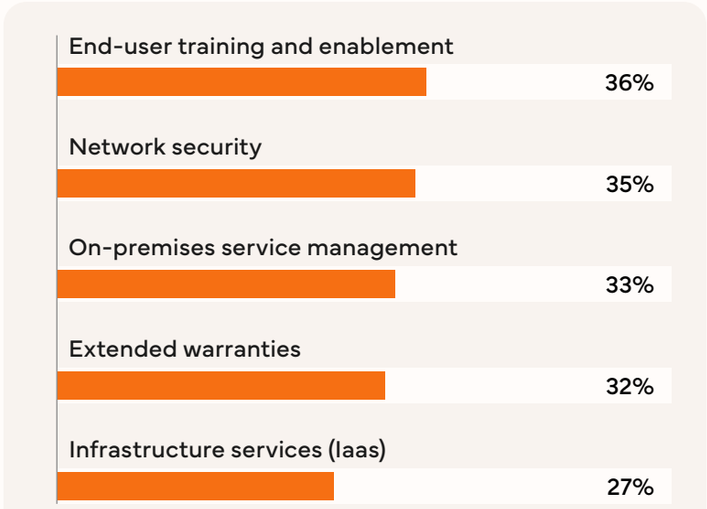
Balancing security, cost, and hybrid architecture

Korean organizations, like their Asia/Pacific peers, prioritize the ISV ecosystem and security when selecting AI PC partners, with end-user enablement seen as a key additonal area of support. While they are willing to pay a premium similar to their regional counterparts, they place even greater emphasis on total cost of ownership, as shown by their strong demand for on-premises and IaaS support. This focus on TCO and infrastructure support indicates a clear preference in Korea for hybrid architectures when building enterprise AI systems.

Top AI PC vendor selection criteria in Korea



Top 5 additional support services Korean organizations expect from their AI PC partners



AI-driven security requires modern hardware

As GenAI enables advanced threat detection and response, security vendors are embedding deep learning and real-time analytics into endpoint solutions — placing greater demand on on-device compute power delivered by NPUs in AI PCs. By 2027, IDC projects that 15% of enterprise PCs will run AI-powered security applications like deepfake detection locally, making legacy devices obsolete for modern security standards.

Source: IDC *FutureScape: Worldwide Security and Trust 2026 Predictions*

Source: IDC *Asia/Pacific AI PC and Modern Workplace Research*, October 2025, n = 75 Korea

Recommendations for Korean organizations

Lead enterprise AI transformation with AI PCs

Korean organizations should fast track AI PC adoption by investing in both back-end and front-end innovation, prioritizing security and hybrid architectures, optimizing total cost of ownership, empowering knowledge workers with advanced AI capabilities, and strengthening partnerships with ISVs and hardware vendors. Together, these actions will enable comprehensive digital transformation and sustain long-term competitiveness.

Prepare for growth by bridging the adoption gap: Despite the low adoption rate, momentum for AI PCs in Korea is building. Now, 69% of organizations are prioritizing AI capabilities for their next PC upgrades. To keep pace with industry-wide transformation and maintain a competitive edge, upgrading to a modern AI PC fleet is a critical next step.

Focus on both back-end and front-end innovation: Expand AI PC use beyond IT operations and engineering/R&D to include customer service and other business functions, driving innovation across the entire organization and transforming core business models.

Be willing to invest for long-term advantage: Paying a premium for AI PCs is a strategic move. Early adoption helps mitigate rising security risks, operational costs, and mounting technical debt, while positioning organizations for sustained competitiveness and innovation.

Support knowledge workers with advanced AI experiences: Equip employees with NPU-powered AI PCs to boost productivity, facilitate collaboration, and enable agentic AI capabilities. This investment helps retain top talent while addressing concerns around operational costs and competitiveness.

Prioritize security and hybrid AI architectures: 64% of Korean organizations view security as the top criterion for AI PCs. Hence, it is important to choose partners that can deliver robust security, and support hybrid AI architectures — combining on-device intelligence with private cloud and edge resources to maximize flexibility, ensure compliance, and protect data.

Strengthen local partnerships and ISV ecosystem: Collaborate closely with ISV partners and hardware vendors to enable advanced AI use cases, secure management, and tailored solutions that meet the unique needs of Korean enterprises as they scale AI PC adoption.

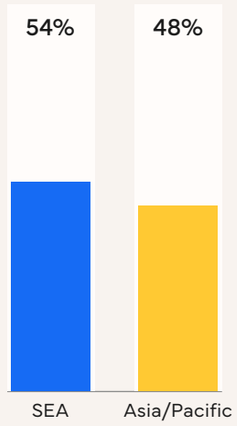
Southeast Asia Insights

Southeast Asia (SEA) is emerging as a regional leader in AI PC adoption, with organizations embracing these devices at rates above the Asia/Pacific average to boost productivity and drive industry-specific innovation. Companies are leveraging AI PCs not only for general efficiency, but also for targeted areas like facility management, sales, marketing, and security, supported by a willingness to invest in premium solutions and a strong focus on security and manageability. These factors position SEA enterprises for continued digital advancement and a competitive advantage.

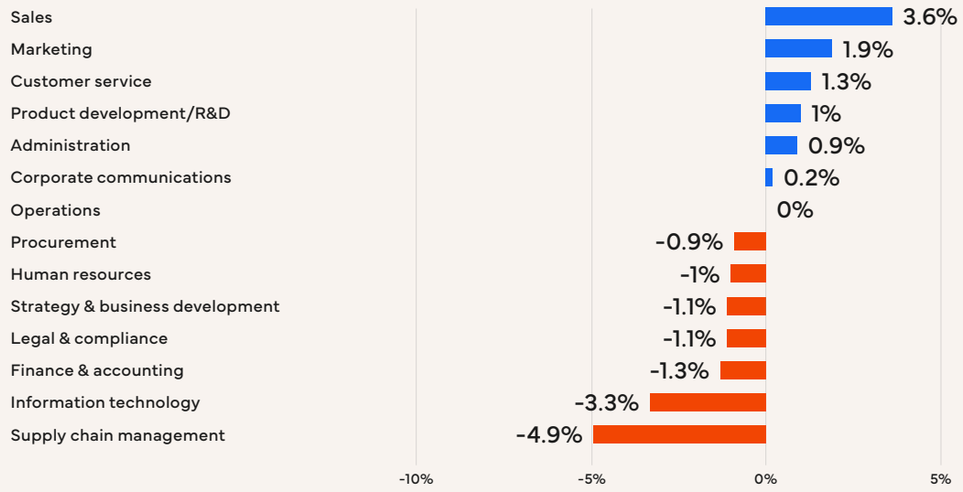
SEA: Accelerating ahead in the AI Race

SEA's* strong AI PC adoption — **6% higher than the Asia/Pacific average** — is fueled by several key factors. These include technical leapfrog strategies that allow organizations to bypass traditional technological stages and embrace cutting-edge solutions, Singapore's leadership in AI maturity and infrastructure, favorable PC market conditions, and supportive government initiatives. Together, these drivers position the region to advance rapidly in the global AI race.

State of AI PC adoption: SEA vs Asia/Pacific



AI PC deployment by department: SEA vs the Asia/Pacific baseline



Although overall AI PC adoption is high in SEA, the adoption rates within individual departments are still relatively low. This may suggest that organizations are choosing to invest in AI PCs gradually and evenly across all departments, rather than prioritizing certain business areas.

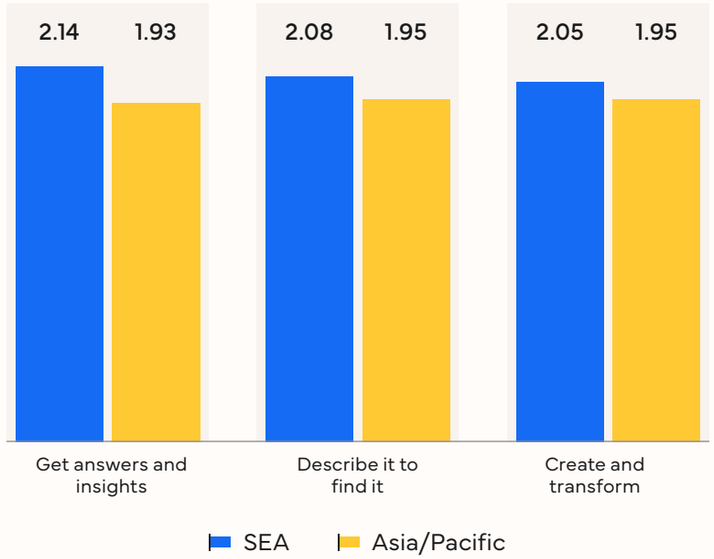
*Includes Malaysia. Philippines, Singapore, and Thailand

Source: IDC *Asia/Pacific AI PC and Modern Workplace Research*, October 2025, n = 170 SEA

A strong investment appetite for AI PCs

Employees in SEA stand out as power users of AI technologies, achieving significant productivity gains. They save an average of 2.09 hours per day, which is 7% more than their regional peers. These real-world benefits encourage organizations to invest in AI PCs to accelerate their AI transformation. This includes reskilling the workforce to build AI competence and developing more secure, high-performing sovereign AI systems.

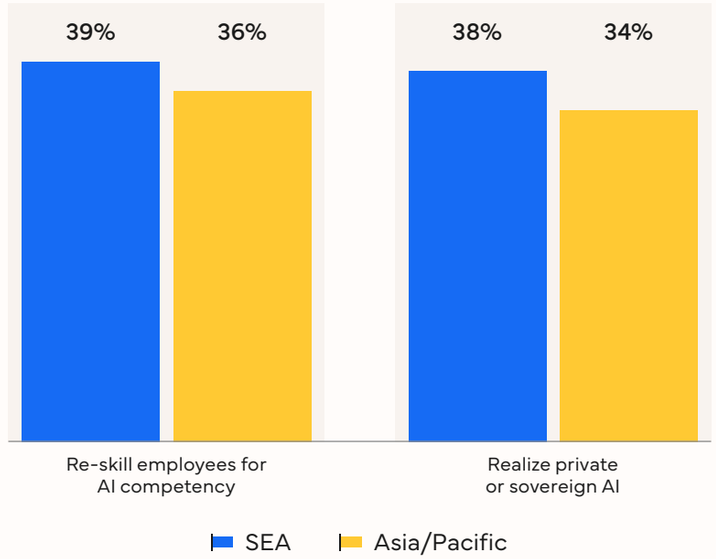
Time saved per employee through AI PC features (hours daily)*



* Aggregating all OS and device segments

Reinforcing the business value of AI by enterprise-wide AI PC adoption

How AI PCs can support enterprise-wide AI strategy



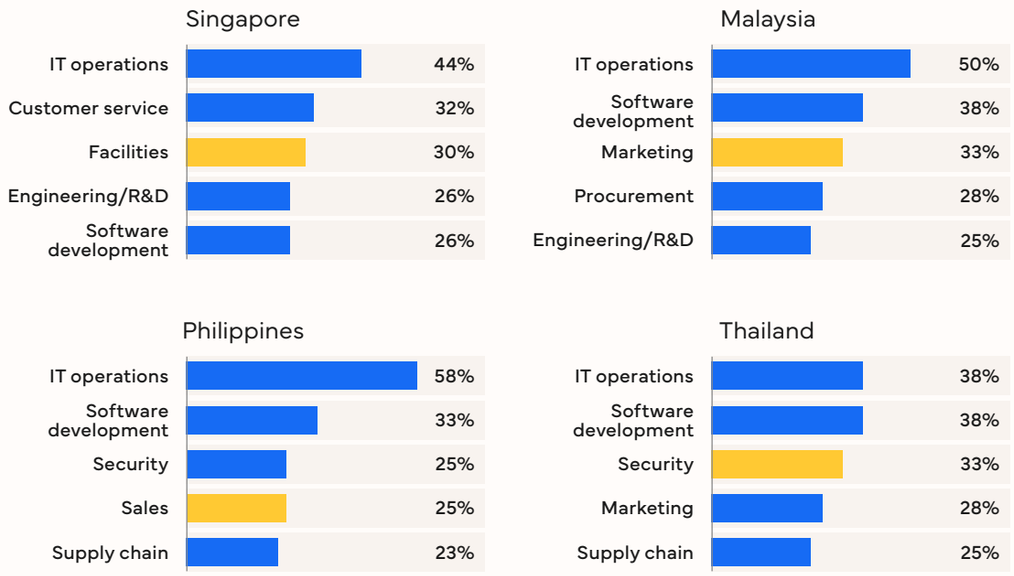
Source: IDC *Asia/Pacific AI PC and Modern Workplace Research*, October 2025, n = 170 SEA

Diverse AI PC priorities across SEA

IT operations is consistently the top area expected to experience the greatest impact from AI PCs across SEA. However, priorities vary by market: Singapore focuses on facility management, the Philippines on sales, Malaysia on marketing, and Thailand on security. This diversity shows how organizations in the region are moving beyond basic productivity gains to leverage AI PCs for industry-specific applications to transform their most competitive functions.

Top business functions expected to be most impacted by AI PCs

(Yellow bars denote the business function in each market with the highest positive delta compared to the Asia/Pacific average.)



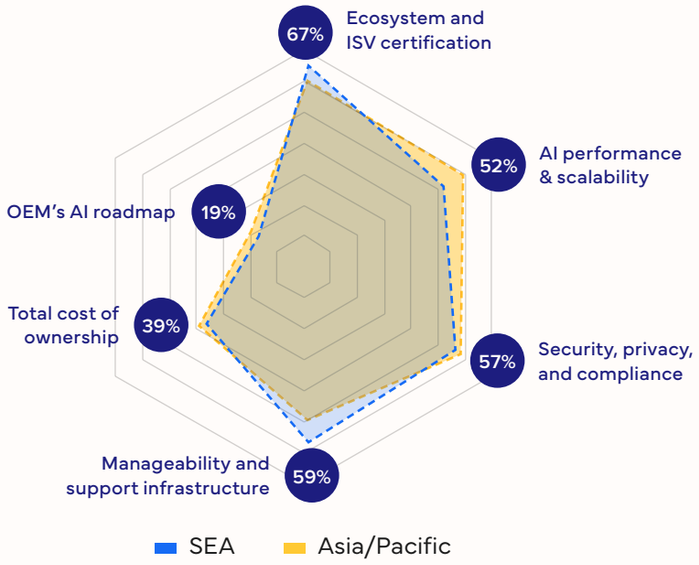
ITOps	Top expected impact area from AI PCs **across SEA**	• Enable real-time, on-device troubleshooting and predictive maintenance • Automate diagnostics and reduce IT support tickets
Facilities	Top emerging impact area in **Singapore** (15% higher than the Asia/Pacific average)	• Monitor building sensors and systems in real time, enabling predictive maintenance • Automate fault detection, optimize energy usage
Sales	Top emerging impact area in **Philippines** (9% higher than the Asia/Pacific average)	• Analyze customer interactions and sales data in real time, enabling personalized recommendations • Close deals faster while keeping sensitive information secure
Marketing	Top emerging impact area in **Malaysia** (14% higher than the Asia/Pacific average)	• Generate marketing content in real time, enabling faster campaign launches • Personalize targeted messaging while ensuring data privacy
Security	Top emerging impact area in **Thailand** (12% higher than the Asia/Pacific average)	• Detect and block malware or phishing attempts in real time directly on the device • Analyze user behavior locally to identify and respond to suspicious activities

Source: IDC *Asia/Pacific AI PC and Modern Workplace Research*, October 2025, n = 170 SEA

Ensuring secure and smooth AI PC deployment in diverse SEA environments

SEA organizations, like their Asia/Pacific peers, prioritize the ISV ecosystem and security when selecting AI PC partners, with security seen as a key accelerator. However, they place even greater emphasis on manageability and support infrastructure, reflecting the region's diverse, distributed and often fragmented IT environments. Robust manageability and support for AI PCs are essential for smooth deployment, centralized control, and minimized operational disruptions for enterprise AI systems.

Top AI PC vendor selection criteria in SEA



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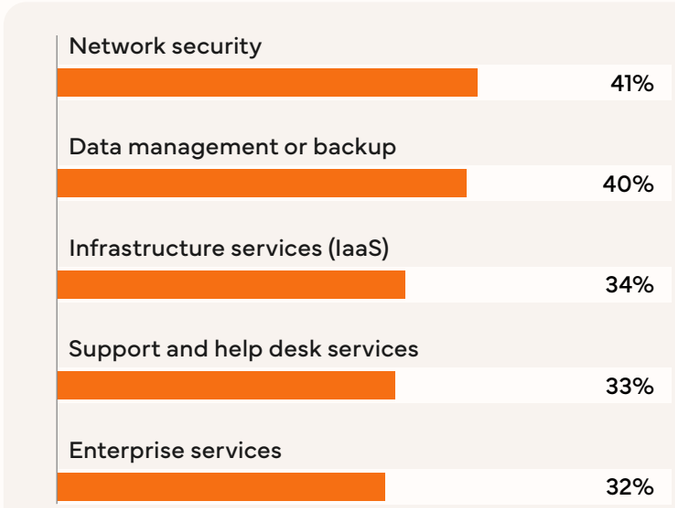

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Source: IDC *FutureScape: Worldwide Security and Trust 2026 Predictions*

Source: IDC *Asia/Pacific AI PC and Modern Workplace Research*, October 2025, n = 170 SEA

Recommendations for SEA organizations

Drive localized AI innovation with AI PCs

To build on their success, organizations in SEA can accelerate AI PC adoption to drive further progress. Investing in secure, manageable hybrid architectures and collaborating with ISV partners on advanced use cases will unlock new opportunities. Prioritizing premium solutions is a key step to boosting productivity, fostering industry-specific innovation, and securing a long-term competitive advantage.

Accelerate AI PC adoption for productivity gains: SEA organizations should continue to invest in AI PCs to capture productivity benefits and future proof their workforce, as regional adoption rates already outpace the Asia/Pacific average by 6%.

Target domain-specific innovation: Leverage AI PCs to drive transformation in the most critical functions — from ITOps to logistics/facility management, to marketing and sales — moving beyond general productivity to domain-specific AI applications.

Maximize ROI with productivity gains: AI PCs can deliver up to 30% higher productivity per employee compared to traditional PCs, enabling faster ROI. SEA organizations should capitalize on their higher daily productivity gains over the Asia/Pacific average by accelerating AI PC adoption.

Invest in employee reskilling and private AI: Use AI PCs to enhance employee reskilling for AI competency. Deploy secure, private AI solutions, building a future-ready workforce, and strengthening enterprise data protection.

Prioritize security and manageability: 57% of SEA organizations prioritize security as the top criterion for AI PCs. They should work with AI PC partners that offer robust security features and strong manageability, ensuring smooth deployment and centralized control across diverse and distributed IT environments.

Collaborate with ISV ecosystems for advanced use cases: Work closely with ISV partners and hardware vendors to enable advanced AI applications and secure management solutions, unlocking the full value of AI PC investments.

Methodology

In October 2025, IDC surveyed 720 IT and business decision-makers across the Asia/Pacific region to understand how organizations are navigating the next wave of computing.

This Asia/Pacific AI PC and Modern Workplace Research explores how leaders are deploying AI PCs to drive real-world progress. The study provides valuable insights into adoption plans, key use cases, expected impact, partnership preferences, and highlights differing trends across the region.

Respondents by country	
Australia	100
China	100
India	150
Japan	125
Korea	75
Malaysia	40
Philippines	40
Singapore	50
Thailand	40
Total	**720**

Company size

> 500 employees

Persona

IT and LOB heads

C-level/owners, VP/SVP, Director

Industries covered	
Cross industry with a focus on	
BFSI	Healthcare
Retail	Transportation
Manufacturing	Higher education
Web tech	Government
Energy	

About the IDC analyst

Daeil Chun

Senior Research Manager, IDC Asia/Pacific

Daeil serves and manages the AI research program and consulting projects in IDC Korea. He also regularly contributes to IDC Asia/Pacific AI research and other cross-domain initiatives involving AI.

More about Daeil Chun →

Message from the sponsors

In the modern workplace, the PC is the most important productivity device, serving as the hub of collaboration, creativity and data-driven decision making. Now these devices are being transformed by AI. Traditional PCs can't keep up with the demands of today's business environment, while AI PCs are designed to provide enhanced levels of productivity, intelligence and insight that can help organizations stay ahead.

As an industry leader at the forefront of AI PC development, Dell Technologies is creating intelligent devices that empower organizations to achieve more.

Dell AI PCs powered by Intel® Core™ Ultra processors are designed to unlock smarter, faster, and more secure computing experiences for everyday users, professionals, and creators alike. Together with Intel vPro®, these PCs enable accelerated innovation and problem solving, delivering a definitive AI experience for business. They offer powerful performance, advanced AI capabilities, and robust, out-of-the-box security to help organizations modernize their hardware and drive business impact.

On top of cutting-edge features, Dell's proven security and manageability keeps data safe and devices running smoothly, whether at home, in the office, or on the go. With seamless compatibility, robust performance, and a future-ready foundation, Dell AI PCs with Intel® Core™ Ultra processors and Intel vPro® empower organizations to work smarter, create more, and unlock new levels of performance.

Discover how Dell AI PCs with Intel® Core™ Ultra processors and Intel vPro® can accelerate your organization's AI journey.

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