DICKER DATA

Understanding the AI opportunity

with Australian and New Zealand SMBs

Microsoft

TRA TECH RESEARCH ASIA

Table of Contents

Introduction

Dicker Data and Tech Research Asia (TRA) have seen a rapid rise in awareness and interest in Generative Artificial Intelligence (AI) across the world.

To understand the impact in Australia and New Zealand, Tech Research Asia (TRA) undertook a survey, on behalf of Dicker Data, with more than 500 SMB businesses in the ANZ region on their current understanding, usage and plans around Generative AI. This report provides a summary of the key findings of that research and provides guidance to partners on how they can capitalise on the opportunity.

The data cited in this report came from a commissioned survey undertaken by TRA in late 2023 and early 2024. Details of the methodology and sample are provided at the end of the report.

SMBs across ANZ are accelerating their digital transformation journeys. The findings of this report make it clear that AI will play a role in their future, however, many are moving ahead without the help of their technology partners, potentially exposing their businesses to data, compliance and risk issues.

Understanding AI

AI has permeated public consciousness, largely due to extensive media coverage, resulting in a broad awareness of the nascent technology amongst the population.

In the relatively short period since Generative AI became truly accessible to the world through platforms such as OpenAI's ChatGPT, ANZ SMBs recorded their understanding of the technology at an above average 7 out of 10. Whilst such a high level of understanding is unusual for a new technology, more alarmingly, Australian and New Zealand technology partner businesses rated their own understanding of Generative AI at an average of 5 out of 10. This data presents the question; are end-customers moving faster than technology partners when it comes to the use of Generative AI or are SMBs over estimating their understanding?

Familiarity breeds... contentment? Personal usage of AI tools has made a significant contribution to the understanding of AI amongst SMBs. Our research uncovered that 62% of Australians and 49% of New Zealanders use AI tools daily, citing Siri and Alexa as the most common AI tools used in this context. As everyone from business leaders to junior employees gain more exposure, confidence and experience using AI tools in a personal context, the more likely it is they'll be actively searching for ways to use the technology in a business context.

ChatGPT leads awareness and usage in Australian & New Zealand organisations with Microsoft Copilot also in the Top 5 recognised AI tools.

Are end-customers moving faster than technology partners when it comes to the use of generative AI or are SMBs over estimating their understanding?

Understanding AI

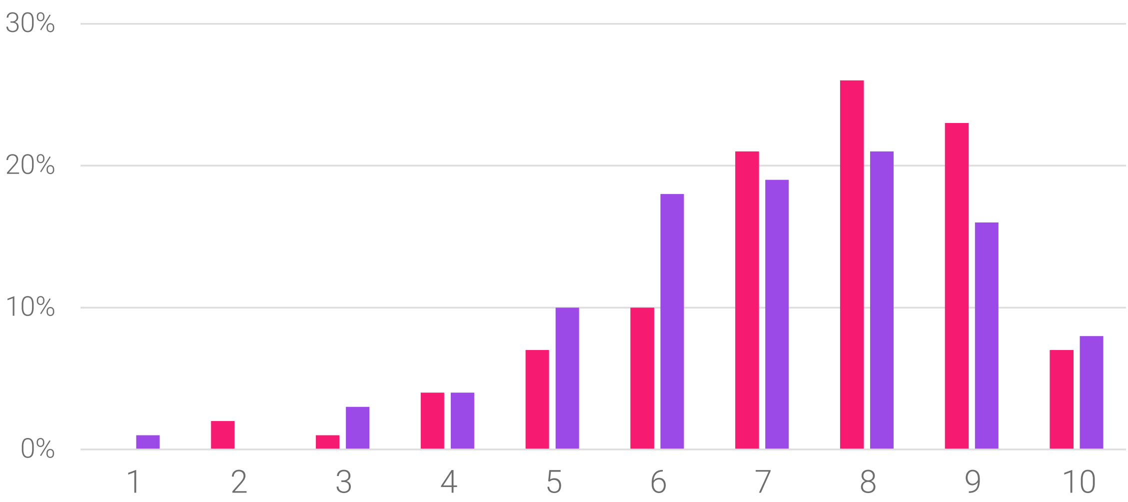
56% of Australian SMBs and 45% of New Zealand SMBs rated their understanding of AI as 7 out of 10 or higher. This high level of understanding has created an urgency to adopt Generative AI solutions, marking a clear shift towards an AI-driven business landscape. Technology partners need to upskill in Generative AI solutions to shepherd their end-customers through this new technological era, or risk losing ground to those who not only understand the technology but can help businesses to realise the full potential of the technology, faster.

SMBs in Australia and New Zealand have already acquired a good understanding of Gen AI.

How well do you understand Generative AI?

Australia New Zealand

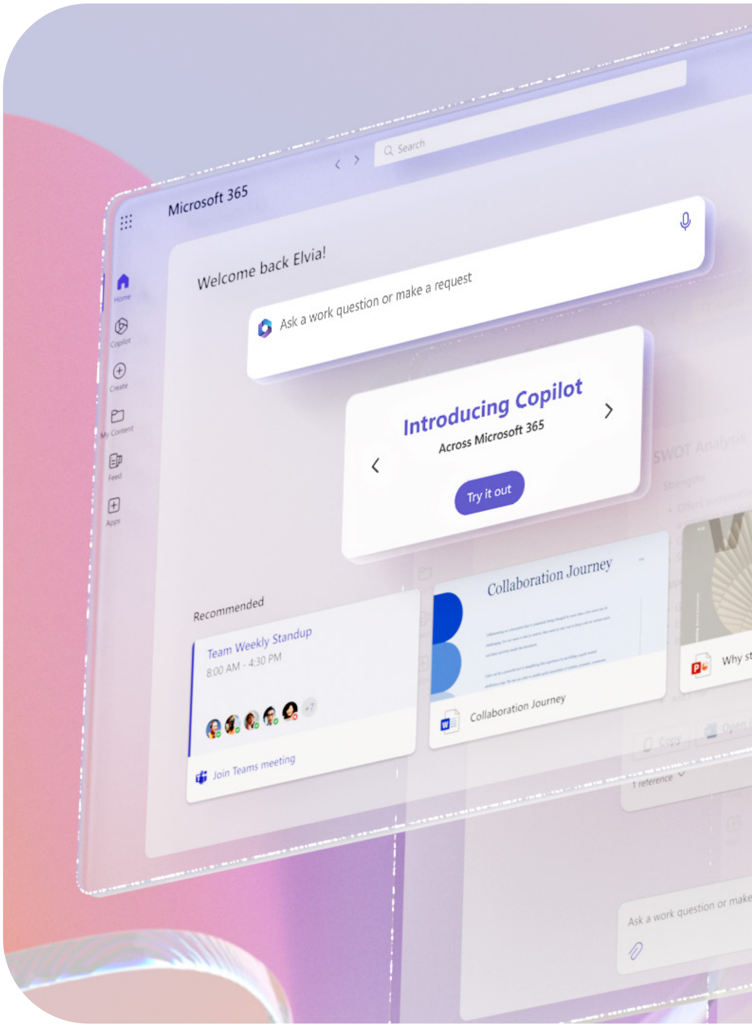
0= very low understanding, 10 = very high understanding



AI Usage

With ANZ SMBs indicating AI adoption is proliferate within their organisations, but also ranking public AI platforms as the most common examples of AI tools used, there's a data, compliance and risk piece that may be being overlooked, presenting an opportunity for partners to proactively engage and deliver their own AI readiness assessments.

Microsoft Copilot ranked within the top 5 recognised AI tools amongst both Australian and New Zealand organisations, with ChatGPT leading the awareness according to our research. However, with 37% of Australian and 31% of New Zealand survey respondents claiming extensive use of AI in a corporate setting, the need for technology partners to step up and provide education and training is evident. Cases of overzealous employees turning to public Generative AI services, such as ChatGPT, and sharing sensitive corporate data only to have the service resurface that same sensitive data to another random user, are all too common. Couple that with the fact that only 2% of Australian SMBs and 1% of New Zealand SMBs stated that they are not using AI at all, and the opportunity and need for technology partners to provide support around generative AI readiness and usage is clear.



Only

3%

of ANZ technology partners state they use Generative AI extensively

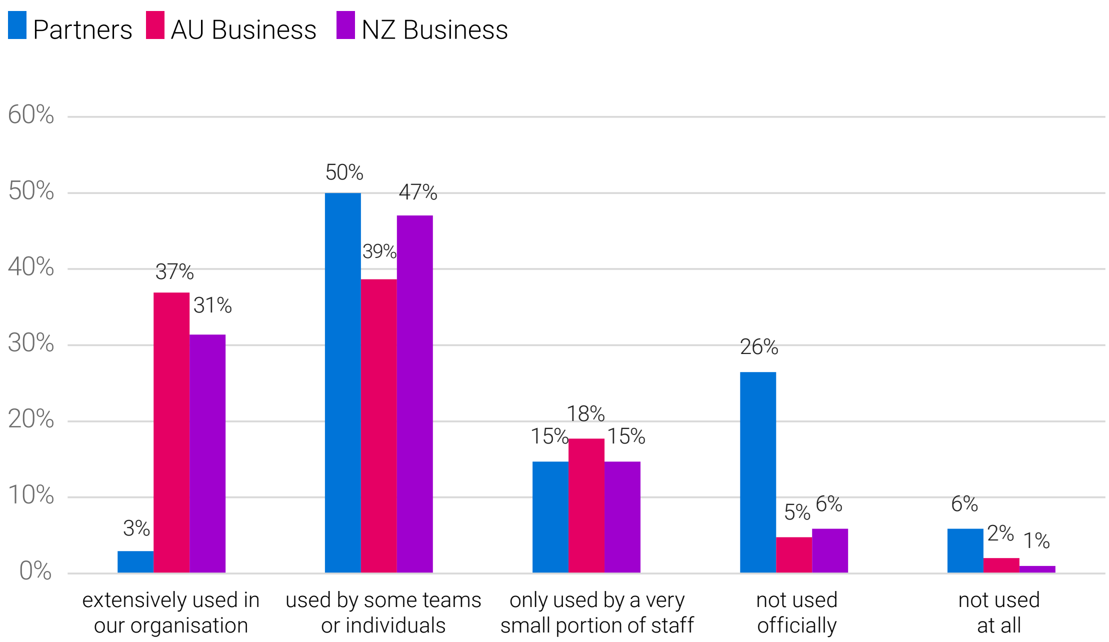
AI Usage

Most striking, however, is the Generative AI adoption rate within technology partners, with only 3% stating they use Generative AI extensively. Conversely, only 2% of Australian SMBs and 1% of New Zealand SMBs said they were not using AI at all, compared to 6% of partners. These figures clearly demonstrate the proliferation of AI amongst SMBs, even if some of them are still experimenting or testing it rather than deploying it into production. The reasons why technology partner uptake of Generative AI tools is significantly lower was not covered by the research, however, may be attributed to their more comprehensive understanding of the risks associated with Generative AI and also due to the rapid rise in cybersecurity threats in the past 12 months, which has diverted their focus away from building offerings around emerging technologies, such as Generative AI.

The concern is the significant difference in usage between customers and partners, with customers embracing AI more quickly than the channel.

We also note, that as with many other emerging technologies, building partner skills, refining business and engagement models and clarity on commercials require careful thought before going to market.

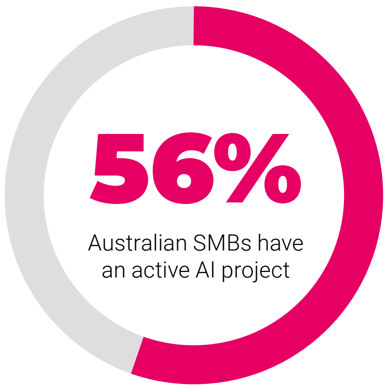
Which of the following statements best describes your organisation's use of artificial intelligence (AI) today?



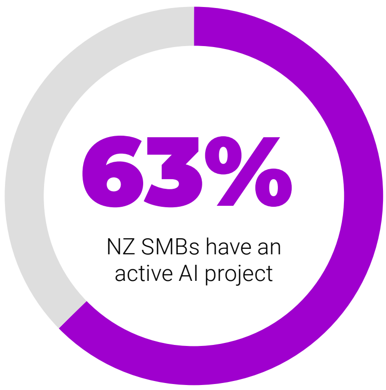
AI Projects

Our research uncovered that AI projects are a priority for ANZ SMBs, with more than half of them already implementing some degree of AI solutions.

These projects are not only aimed at improving internal efficiency and productivity, but also creating new value propositions, products and services for their customers, with the goal of delivering a positive impact on their revenue. Interestingly, 66% of Australian SMBs and 62% of New Zealand SMBs stated already having a formal strategy to assess, adopt and deploy Generative AI solutions. For the remainder of companies surveyed the most common entry point for AI was for employees informally adopting tools to help with specific tasks.



Looking back at other major technology shifts in the past decade, such as the advent of cloud, technology partners were the relied upon source for making recommendations and helping their end-customers navigate the changing landscape. However, the ease of access to AI tools appears to have created an environment where businesses and individuals are moving faster than their technology partners, and, according to the research data, have more experience and more active test-cases than their technology partners.



This poses a risk for partners who are not able to assist their end-customers with their Generative AI aspirations, but also is possibly exposing end-customers to potential cybersecurity vulnerabilities, for example ‘poisoned LLMs’, ‘AI sleeper agents’ or prompt injection attacks.

AI Budgets & Reporting

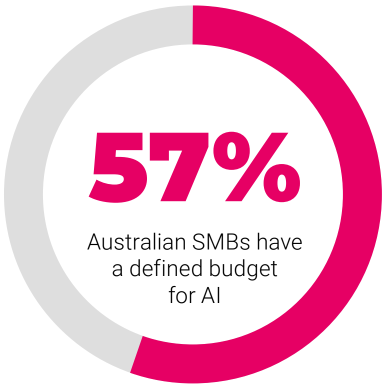
Desire to deploy is nothing without budget. Our research revealed there is an urgency to act, with 57% of Australian companies and 68% of New Zealand companies indicating they have budgets allocated for Generative AI initiatives already.

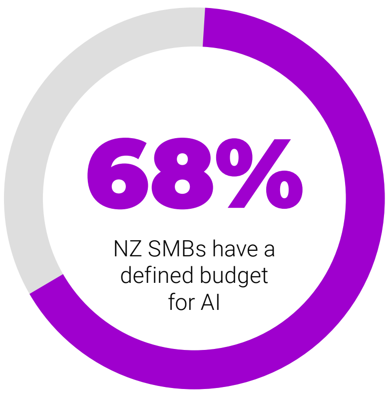
As SMBs increase their AI budgets and deployments, they also need to consider the ethical and governance implications of their AI solutions. AI can have significant impacts on society, the economy, the environment, and human rights. Therefore it requires careful oversight and accountability. Technology partners can play a vital role in helping their customers navigate the complex and evolving landscape of AI ethics and governance, by providing guidance, frameworks, tools, and best practices for responsible AI.

This has also created a business opportunity for partners to differentiate themselves and create new value-added services. For example, partners can offer AI readiness assessments to help their customers evaluate their AI maturity, identify potential risks or gaps, and implement appropriate mitigation strategies. By doing so, partners can proactively engage with their customers on their AI journeys, build trust, loyalty, and ensure safe, ethical, and beneficial AI outcomes.

Top 3 Generative AI areas of budget allocation in ANZ

1. Analytics & Business Intelligence
2. Operations Automation
3. Chatbots





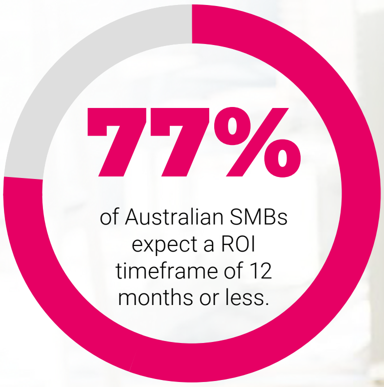
Focusing on Return on Investment (ROI)

Customer urgency to act and create results was reflected in our research by the relatively short ROI expectations for Gen AI projects.

Our research shows that 77% of Australian SMBs and 84% of New Zealand SMBs expect an ROI timeframe of 12 months or less.

This is optimistic. In our experience, and through conversations with organisations that are well advanced with Generative AI deployments, there are a number of complexities that slow progress, namely getting ‘data-fit’ and ‘network fit’ for AI solutions, data cleansing, staff training, customer communication programmes, security, privacy and legal reviews and auditability.

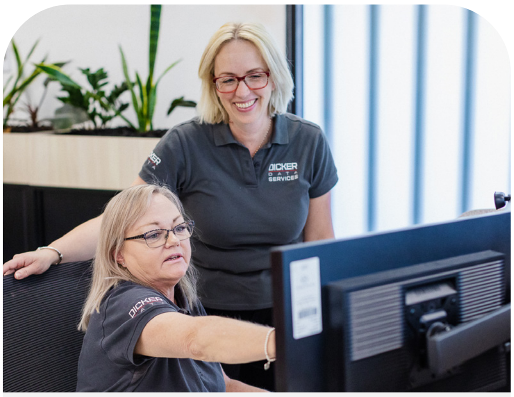
Regardless of the reality of deployments, 80% of Australian businesses and 72% of New Zealand businesses report having measurable Generative AI project KPIs in place. Partners will face heightened customer expectations around ROIs (and related business cases) and need to carefully lead customers through all the nuances of an AI deployment and manage expectations very carefully.



Focusing on Return on Investment

There are multiple ‘phases’ for AI projects from ideation through to deployment and ongoing management. Business needs will vary significantly across different phases and there exists a clear opportunity for partners that can bring multiple capabilities (e.g. data management, governance, education, integration, etc) to customer engagements.

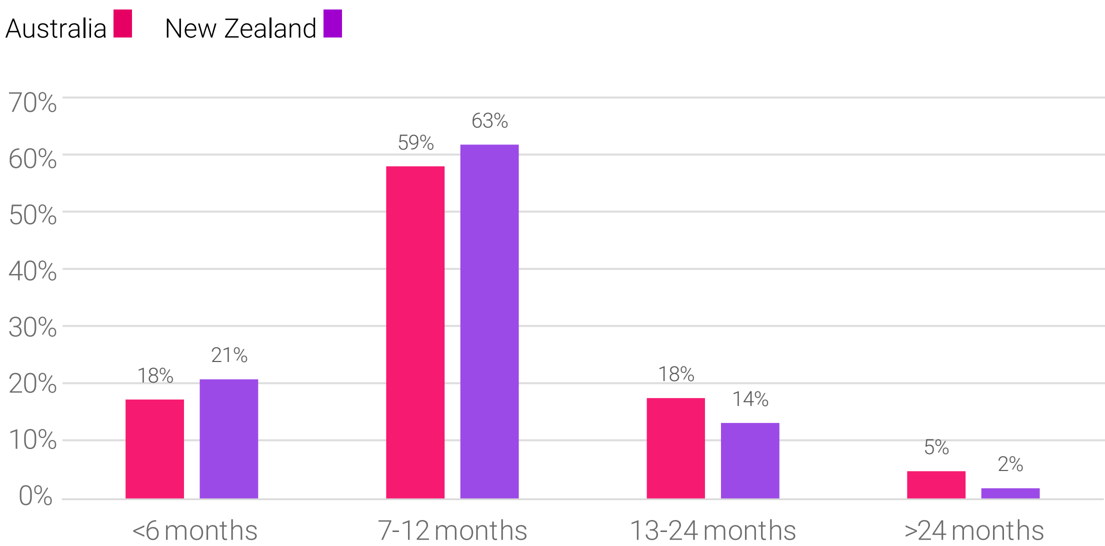
Our view, based on further discussions with SMBs, is that they are currently building their experience by tackling smaller projects in this initial phase before embarking on significant companywide initiatives. For partners this also means there are opportunities to help with these ‘pilot’ style projects as well as engaging in a broader dialogue for more comprehensive cross-company projects with broader scope.



“Consultants can help measure the ROI and impact of AI initiatives”

2024 survey respondent

How quickly do you expect AI tools to create a return on investment once deployed and operational?



Impacts, Barriers, Risks

The Impact of AI

Many transformative technologies (laptops, the internet, smart mobile devices, cloud) generate positive expectations and Gartner's hype cycle has documented many of the lows and highs of those journeys. The expectations for Generative AI solutions are at an even higher level, with ANZ SMBs showing bullish levels of optimism for very positive impacts and outcomes – on average companies rated the positive potential for Generative AI with a score of 8.6 out of 10. The breadth of impact is wide ranging across multiple aspects, including contracting and employment, customer engagement, content creation and business productivity.

Barriers to AI Adoption

The perceived barriers to adoption varied quite significantly between Australia and New Zealand with Australian SMBs concerned about funding and skills shortages. New Zealand businesses were more concerned about Security, IP loss and concerns from employees. Interestingly, AI readiness did not rank as a barrier to adoption, demonstrating that organisations are most likely unaware of what's required prior to deploying Generative AI solutions.

Risks of AI Adoption

Key AI adoption risks revolve around employees (lack of trust in AI), accuracy of results (hallucinations), liability (accountability of the model and removal of bias), data ingestion (controls, loss of IP and related data governance issues) and poor effectiveness due to inadequate training.

Top 3 Impacts, Barriers and Risks

Our research revealed the top three areas where SMBs see the most impact from AI, the most significant barriers to adoption and the top areas of risk surrounding AI adoption. A summary of these for Australia and New Zealand is provided below.

The Impact of AI

AUSTRALIA:

1. Increased employee productivity.
2. Customers using AI to research our company and solutions.
3. Faster and more accurate workforce insights.

NEW ZEALAND:

1. Customers using AI to research our company and solutions.
2. Faster and more accurate workforce insights.
3. Our employee experience teams and partners will utilise AI.

Barriers to AI Adoption

AUSTRALIA:

1. Lack of funding
2. Skills shortages
3. Cost of Gen AI tools

NEW ZEALAND:

1. Security and loss of IP concerns
2. Employee concerns
3. Lack of funding

For partners, these are clear areas of opportunity to support stickier client engagement through additional capabilities such as Governance, Risk, and Compliance, training and education.

Risks of AI Adoption

AUSTRALIA:

1. Employee lack of trust
2. Hallucinations (inaccurate results)
3. Legal liability on responsibility for output

NEW ZEALAND:

1. Hallucinations (inaccurate results)
2. Poor training leading to sub-optimal use and outputs
3. Data types ingested into model – prohibited, sensitive or protected data sources

AI Readiness

AI Readiness is one of the most critical components of delivering successful business outcomes with AI. Businesses who overlook this step potentially expose themselves to increased risk and unforeseen internal and external challenges.

There are many factors to be considered for organisations looking to adopt AI solutions. Despite relatively high levels of self-assessed awareness, our research data suggests ANZ companies still need to build foundations to become AI-fit. This is a concern given the level of project activity and usage already identified in our research.

We looked at multiple factors to see what companies had in place, including AI-ready infrastructure, training and education programmes, cyber and data management policies, legal and ethical guidelines, etc and the results indicate a relatively low level of overall operational AI readiness across SMBs in Australia and New Zealand:

AI Readiness Indicators for ANZ SMBs

The Role of Partners

The survey data points to the importance of engaging partners to support AI strategy and solutions.

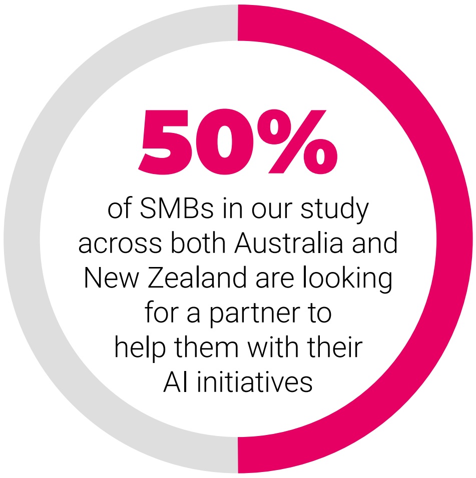
66% of Australian and 73% of New Zealand companies have already engaged third party technology partners to help them with their AI initiatives. Furthermore, SMBs are also still looking to engage new partners, which we expect is being driven by the broad nature of AI projects and scope and breadth of skills needed throughout the project lifecycle.

The reality for most SMBs is that they may need a mix of partners that will vary depending on their own internal skills to achieve their goals. Skills are likely to be needed across change management, data strategy and management, cloud, cybersecurity and GRC, training and education, etc.

Many partners currently focused on AI solutions cannot point to a full stack of capabilities that incorporate all these areas, leading to the need for strong partner-to-partner collaboration to achieve the required outcomes for customers.

"We need to partner to best understand the right fit for our needs and business priorities"

2024 survey respondent



AI: The Partner Perspective

Our partner survey data indicates a clear gap between SMB customer understanding of AI and and that of partners, with partners self-rating 5.4 out of 10 compared to Australian SMBs (7.4 out of 10) and New Zealand SMBs (7.2 out of 10).

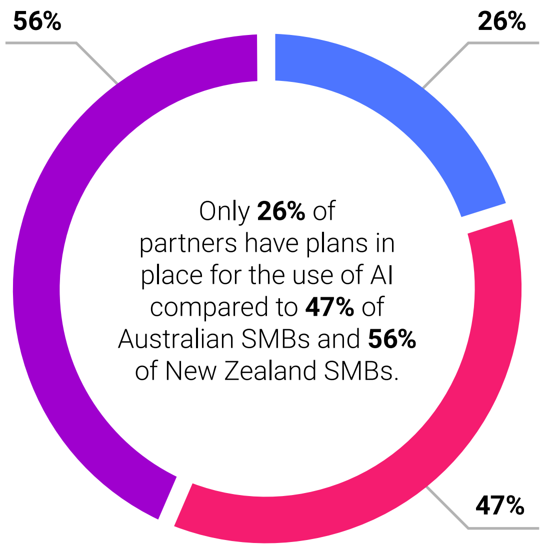
Partner usage of Generative AI is also lower compared to ANZ businesses with 53% of partners using it extensively or with some teams within their business (vs. 76% of Australian SMBs and 78% of New Zealand SMBs).

Further to this, only 18% of partners have a lead for AI within their business (more than 2/3 of Australian and New Zealand SMBs have a lead). None of the partners surveyed had a company-wide plan in place for how they will utilise AI.

Compared with ANZ organisations, partners also exhibited lower levels of maturity with staff training, policy development, human, ethical guidelines, data and user access and audit and governance.

These issues are key for ANZ businesses who are looking to partners to assist them. There is a clear need to increase partner activity and investment in many areas related to Generative AI solutions.

Partners cited skills shortages as the #1 barrier to their AI plans, (also a concern for customers) meaning partners may need to think more creatively on how to build skills in AI within their teams. One way to achieving this is through upskilling and cross-skilling existing team members who demonstrate a level of interest in AI.



Skills shortages are the #1 barrier to greater adoption and use of AI with partners

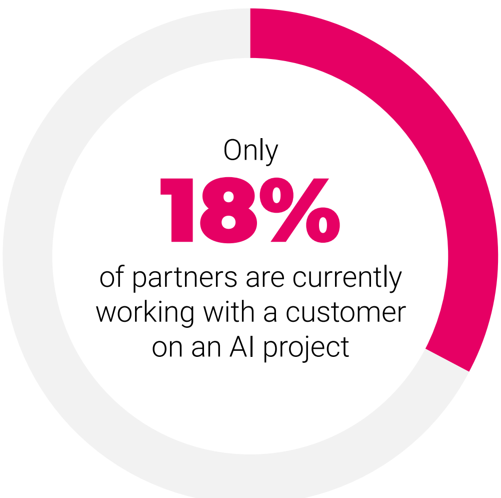
AI: The Partner Perspective

With technology vendors rapidly releasing and deploying AI solutions, there is a large amount of training material available to help partners upskills their workforce. Plus, distributors have the people and resources available to help partners scale their AI ambitions.

Partners did see some of the same opportunities that SMB customers saw, specifically in; Automating business operations and Analytics & Business Intelligence. SMB customers are also looking at the role of AI in customer experience, including sales and marketing, and this represents an additional opportunity for partners.

Only 18% of partners indicated having AI projects currently underway with a customer. This is in stark contrast to our customer data which showed that more than two thirds of customers in ANZ are already working with a partner on an AI related project.

There is also a disconnect between what customers state as their ROI expectations for Generative AI and what partners think their customers expect.



On average, customers' ROI expectations are 7-12 months, yet partners believe the majority of customers are looking for ROIs of six-months or less.

From our discussions, there are two reasons contributing to this.

Firstly, as customers move through their AI project planning there is a realisation that whilst AI tools are technology-based, there are significant 'non-tech' issues to overcome as well. These can include change management programs, data cleansing, employee education, and more. Partners may have a narrower perspective, focusing more on the technology issues only.

Secondly, and related, customers are looking at broader, more comprehensive AI projects with longer ROI times and partners may be missing out by focusing more on smaller AI initiatives and projects.

Dicker Data's Key Takeaways and Next Steps for Partners

In a challenging economy, business and technology leaders are under pressure to reduce costs and drive efficiencies whilst simultaneously finding ways to improve customer experience and fuel growth.

AI has arrived at the perfect time, and our research showed that more than half of SMBs across Australia and New Zealand already have AI projects underway. This shows the 'early adopter' mentality of ANZ SMBs who are embracing AI at speed within their organisations as they move quickly to test, pilot and deploy AI solutions.

The call to action for partners is clear; SMBs in the ANZ region are adopting AI quickly, allocating budgets and looking for partners to help them accelerate their AI initiatives.

The opportunity is now here for partners that can move quickly and secure first-mover advantage.

AI readiness is a critical area where partners can create a commercial offering. Our research indicates that many customers may be overlooking this step, potentially exposing their organisations to higher levels of risk and compliance issues. Partners can use the readiness process to identify areas to upsell and cross-sell additional services and products that will help their customers achieve their desired outcomes sooner, in a safer and more compliant manner.

The Dicker Data Perspective

Many companies express the need for AI expertise and external partners to navigate the rapidly advancing technology. They see AI as the future, a way to improve efficiency, competitiveness, and increase revenue.

Training employees, understanding AI basics, and addressing security concerns are common goals for ANZ SMBs. Some are exploring AI, while others cite budget constraints. Collaboration with professionals and experts is sought for strategic planning, AI implementation, and achieving specific business goals.

AI is seen as a tool for growth, and businesses are eager to adapt, to stay ahead in this evolving landscape.

For more information:
www.dickerdata.com.au/ai
www.dickerdata.co.nz/ai

Dicker Data's AI Landscape View

USER FOCUSED
Generative AI

Capable of generating text, images and other media using generative models. Easily accessible via conversational language by any user anywhere with an internet connection, and eventually locally on their devices.

- Microsoft Copilot
- Chat GPT
- Siri
- Adobe Firefly

ORGANISATION FOCUSED
Embedded AI

AI technology that's built into products to provide common model management, data collection and preprocessing to enable real-time decision making by AI to deliver better outcomes.

- Cybersecurity
- Wireless Networking
- Security Cameras
- Microsoft Azure
- AI PC

FOUNDATIONAL
Full Stack AI

Integrated, interconnected components in a cohesive platform to collect, analyse and supply business data. Includes guardrails, easy to use interfaces and ensures security, privacy and governance

- NVIDIA
- Microsoft Azure
- Dell Technologies
- Hewlett Packard Enterprise
- Lenovo

Where to next for Partners?

1

Upskill your business

Like with other major technology shifts, customers will look to their partners for the education on AI. With two thirds of ANZ SMBs indicating that they're engaging with partners for help with AI solutions, but less than a fifth of partners stating they're working on AI projects with their customers, there's a clear disconnect. If a technology partner is not able to assist with AI, ANZ SMBs are moving quickly to find alternative partners who can.

2

Start the conversation

The high level of awareness and adoption amongst ANZ SMBs demonstrates a need for technology partners to start proactively addressing AI with their customers and to tap into the growing project budgets.

3

Engage your distributor

Speak to your distribution partner about your AI ambitions and the questions your customers are asking. Your distributor has the skills and experience to help you navigate the landscape and design the appropriate solutions for your customers. Furthermore, platforms such as Dicker Data's Partner-to-Partner (P2P) portal can help you find other partners that can assist with filling skill gaps in your business and help you to win and deploy larger AI opportunities.

4

Provide guidance

Low levels of AI readiness and governance is a concern and an entry point for partners. As the custodians of the customer's technology environment, there is a responsibility on technology partners to advise and support their customers as they progress on their AI adoption journeys. This can be achieved through AI readiness assessments, IT environment audits and AI deployment planning.

5

Complete your AI Readiness Assessment with Dicker Data now!

We have invested with Microsoft to bring their globally revered AI readiness tool to ANZ, exclusively for Dicker Data's partners, and their end-customers. Our online tool will help you get an understanding of the readiness level of an organisation, plus our team can then support you in deploying the recommendations. Visit anz.ai-compass.ai to get started today.

We are here to help

Dicker Data is here to help all ANZ partners capitalise on the AI opportunity. Our team of experts are available to answer questions and support technology partners in deploying safe, responsible and ethical AI solutions that help ANZ SMBs to unleash their full potential.

For more information contact:

sales@dickerdata.com.au
sales@dickerdata.co.nz

About

Dicker Data commissioned TRA to conduct a survey of Australian and New Zealand SMBs to understand current perspectives, usage and adoption. TRA conducted a survey in Q4 2023 and Q1 2024 across 500+ SMB businesses in Australia and New Zealand, a detailed breakdown of demographics is provided in the following pages.

TECH RESEARCH ASIA (TRA).

TRA is a fast-growing IT analyst, research, and consulting firm with an experienced and diverse team in: Australia, Singapore, Malaysia, and Tokyo. We advise executive technology buyers and suppliers across Asia Pacific. We are rigorous, fact-based, open, and transparent. And we offer research, consulting, engagement and advisory services. We also conduct our own independent research on the issues, trends, and strategies that are important to executives and other leaders that want to leverage the power of modern technology.

www.techresearch.asia

Australia: Datasheet

AI understanding	Average: 7.4/10 14% assessed their understanding at 5/10 or less, 7% scored themselves as 10/10.
Awareness Top 5 AI tools	ChatGPT, Siri, Alexa, Google Bard, Microsoft Copilot 71% awareness of ChatGPT 35% awareness of Microsoft Copilot
Personal usage for professional role	31% multiple times per day, 26% once per day, 3% do not use
Company-wide usage level	37% used extensively across company, 39% some teams/individuals, 5% not officially used, 2% no usage at all
AI Strategy	66% started using as part of an overall AI strategy 24% Have a comprehensive AI plan
AI Leadership	66% have a nominated AI lead
Top 3 reasons for not using AI	Immature technology, lack the skills, cost concerns
AI projects underway	56% have projects underway; 46% of these focused on external/top line initiatives, 36% on internal projects, 19% are a blend of both
Allocated AI budget	57% have an allocated budget, 35% do not, 8% unsure
Top 3 AI investment drivers	Optimisation of business operations, future roadmap activity, match competitor activities in market
ROI expectations	18% < 6 months, 59% 7-12 months, 18% 13-24 months
Top 3 AI impact areas	Faster & more accurate workforce insights, increased employee productivity, use less freelancers/contractors
Top 3 barriers to adoption	Lack of budget, lack of internal skills, shortage of third party skills
Top 3 perceived risks	Lack of employee trust Hallucinations (inaccurate results) Legal liability and responsibility for AI generated content and output
Top 3 data & privacy concerns	Accidental breach or leak of IP Inadequate user and data access controls 3rd party access to data and IP ingested into model
Engaged partners	66% currently using third parties to support AI projects
Looking for partners	52% looking for partners - either to start first project, support additional projects or replace current partner(s)

Note: This data is a summary of key Australian company data points.

New Zealand: Datasheet

AI understanding	Average: 7.2/10 17% assessed their understanding at 5/10 or less, 8% scored themselves as 10/10.
Awareness Top 5 AI tools	ChatGPT, Siri, Alexa, Microsoft Copilot, Google Bard 69% awareness of ChatGPT 38% awareness of Microsoft Copilot
Personal usage for professional role	31% multiple times per day, 20% once per day, 1% do not use
Company-wide usage level	31% used extensively across company, 47% some teams/individuals, 6% not officially used, 1% no usage at all
AI Strategy	62% started using as part of an overall AI strategy 32% Have a comprehensive AI plan
AI Leadership	73% have a nominated AI lead
Top 3 reasons for not using AI	Business case not justified, negative employee perceptions, negative customer perceptions
AI projects underway	63% have projects underway; 46% of these focused on external/top line initiatives, 43% on internal projects, 11% are a blend of both
Allocated AI budget	68% have an allocated budget, 24% do not, 8% unsure
Top 3 AI investment drivers	Optimisation of business operations, competitive differentiation, match competitor activities in market
ROI expectations	21% < 6 months, 63% 7-12 months, 14% 13-24 months
Top 3 AI impact areas	AI-assistants will help employees in their work, increased employee productivity, our customers will use AI to research us before they buy
Top 3 barriers to adoption	Security and loss of IP, employee concerns, lack of budgets
Top 3 perceived risks	Hallucinations (inaccurate results) Poor training leading to sub-optimal results/usage Using prohibited or protected data
Top 3 data & privacy concerns	Accidental breach or leak of IP Inadequate user and data access controls Deliberate misuse of company data and PII
Engaged partners	73% currently using third parties to support AI projects
Looking for partners	50% looking for partners - either to start first project, support additional projects or replace current partner(s)

Note: This data is a summary of key New Zealand company data points.

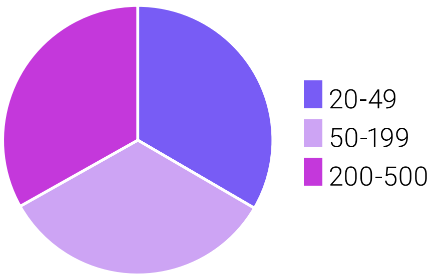
ANZ Partner: Datasheet

AI understanding	Average: 5.4/10; (Australia SMB 7.4, NZ 7.2)
Awareness Top 5 AI tools	100% awareness of ChatGPT 100% awareness of Microsoft Copilot
Company-wide usage level	3% used extensively across company, 50% limited usage, 26% not officially used, 6% no usage at all
Company-wide usage level	31% used extensively across company, 47% some teams/individuals, 6% not officially used, 1% no usage at all
AI Strategy	10% started using as part of an overall strategy; (Australia 66%, NZ 62%) 0% Have a comprehensive AI plan; (Australia 24%, NZ 32%)
AI Leadership	18% have a nominated AI lead; (Australia SMB 66%, NZ 73%)
AI projects with customers	19% have projects underway with customers; (Australia SMB 56%, NZ 63%)
Allocated AI budget	6% state that their customers have AI budget; (Australia SMB 57%, NZ 67% say they have budget allocated)
Top 3 AI investment drivers for customers	Optimise internal business and/or technology operations AI is on future roadmap To match competitors' activities in market
ROI expectations (from customers)	53% < 6 months, 27% 7-12 months, 20% 13-24 months
Top 3 AI impact areas	Increased employee productivity, Faster & more accurate workforce insights AI assistants will support employees
Top 3 barriers to adoption	Skills shortages Security and loss of IP Employee concerns, lack of budgets
Top 3 perceived risks	Loss of IP to 3rd parties Inaccurate results & hallucinations Increased vulnerability to cyber attacks
Top 3 areas partners think customers want	Automating business operations Analytics & business intelligence Software code generation and related
Top 3 areas customers say they want	Analytics & business intelligence (AU & NZ) Graphic design and video marketing (AU), Chatbots (NZ) Automating business operations (AU), Advertising, sales and marketing automation (NZ)

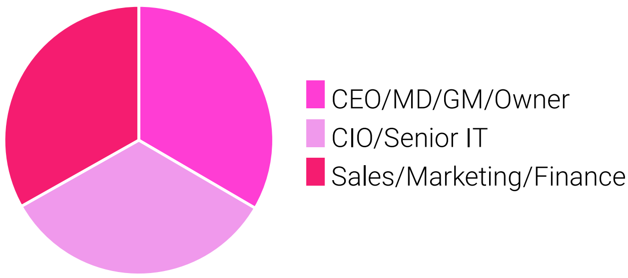
Note: This summarises ANZ Partner data as it relates to the partner perspective of AI within their business. We have provided ANZ company data as a contrast where relevant.

Demographics: Australia

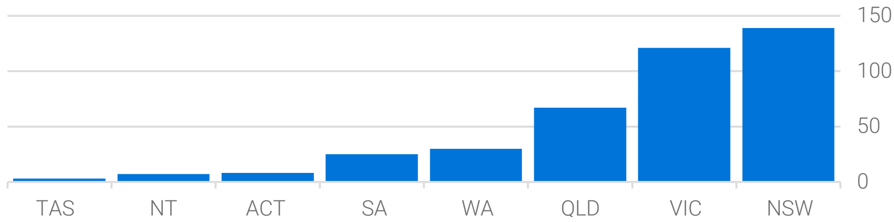
Respondents by Company Size



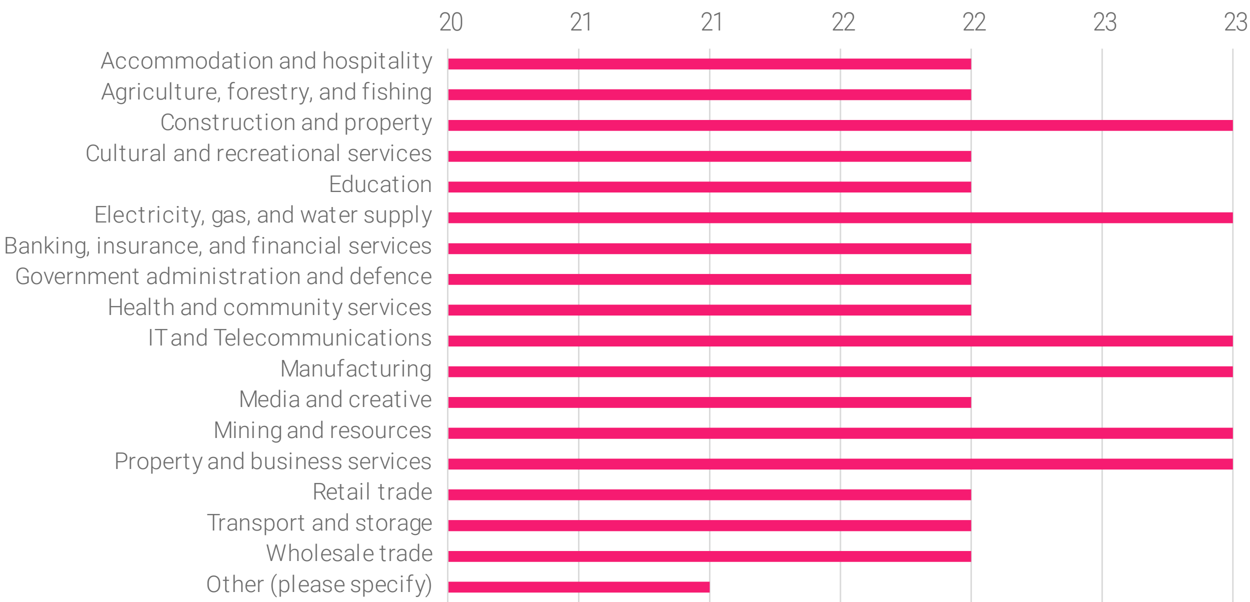
Respondent by Role



Respondents by State



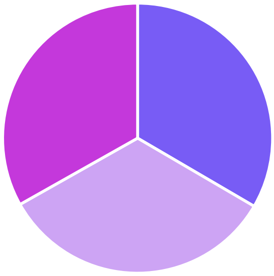
Demographics by Sector



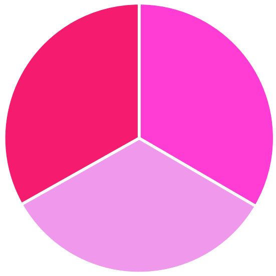
Demographics: New Zealand

NEW ZEALAND:
102 Companies

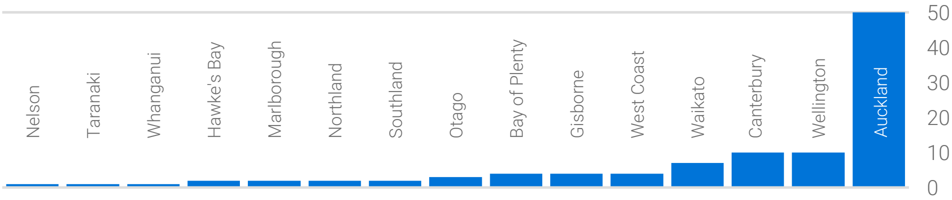
Respondents by Company Size



Respondent by Role



Respondents by Region



Demographics by Sector

DICKER DATA

Microsoft TRA

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