

Beyond the Hype – AI Adoption in B2B Software

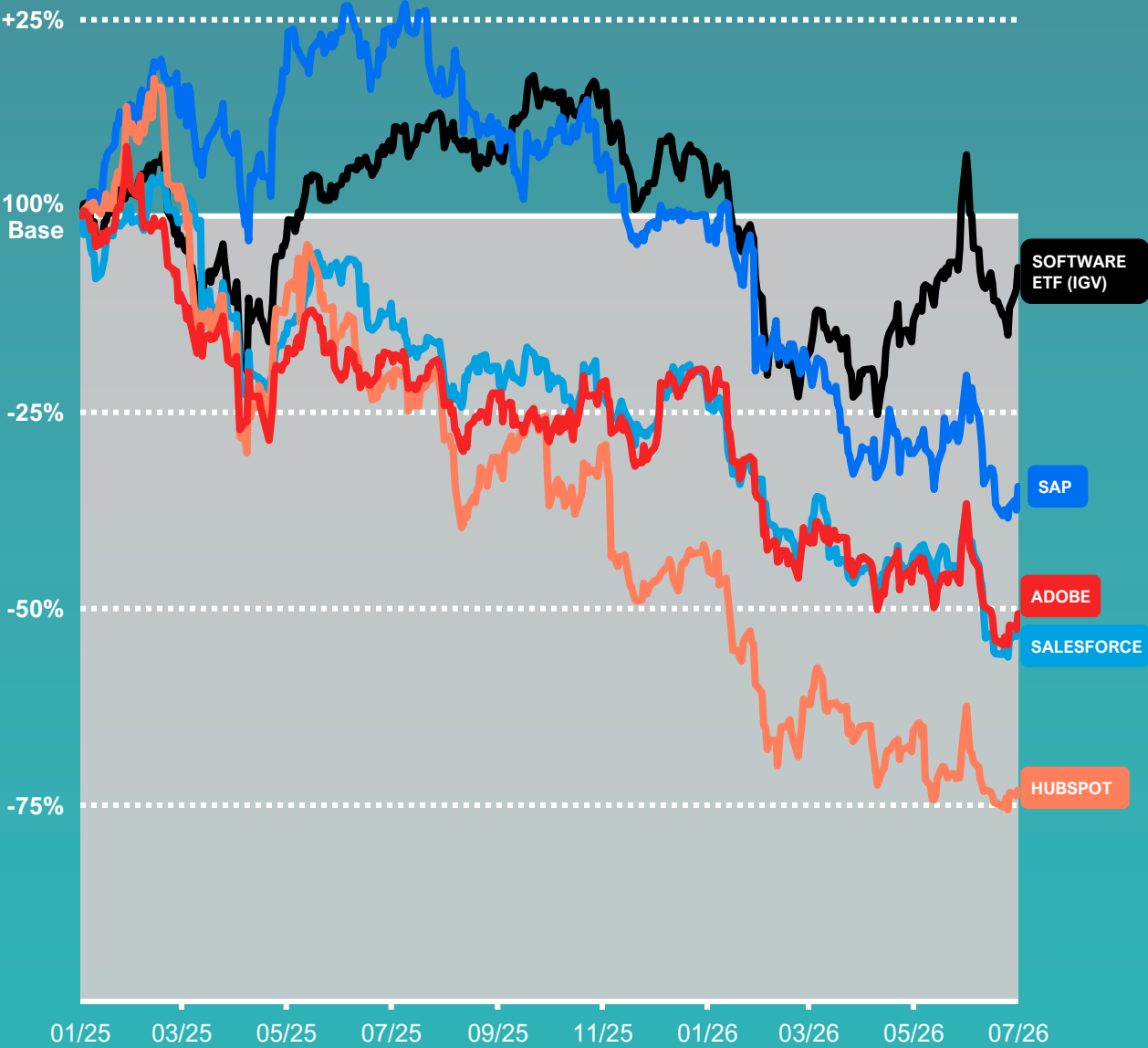
+360 DACH executives on how AI reshapes what software customers buy. A joint study by Elvaston Capital Management and OC&C Strategy Consultants.

SaaSpocalypse?

Is B2B software really doomed with the rise of AI?

Software valuations under pressure

Stock performance, % deviation from January 2025 baseline



Collaborative study

by Elvaston, our portfolio companies, and OC&C Strategy Consultants

Elvaston

Enterprise software investor in DACH & Europe

+3bn
€ AUM

+160
Software deals

+25
Professionals

Portfolio

16 Platforms

Vertical software

DOCUFY

GLAUX GROUP

kraftwerk
Energy Software Services

leading
hospitality
solutions

MIRUS
SOFTWARE

NEXIS

stonebranch

Textile
Solutions Group

softengine

Horizontal software

ABRA

HEIDLER

humera

proLogistik

REMIRA
Engineering Solutions

SelectLine Group

Managed services & IT

CONVOTIS



OC&C
Strategy consultants

Strategy consultancy

1987
Founded in the UK

+38 Years
Experience

+900
Consultants

15
Offices

Insights from +360 executives

forming a representative sample across the DACH “Mittelstand”

Overview of responses

Geographic distribution, headcount, and industries

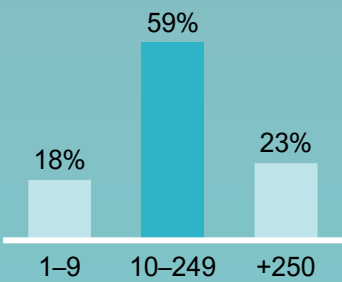
+360

Total respondents

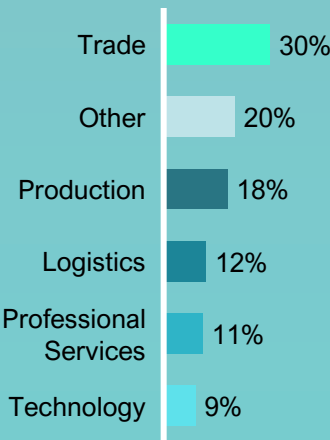
Apr – Jun 2026

Data collection period

Headcount (FTE)

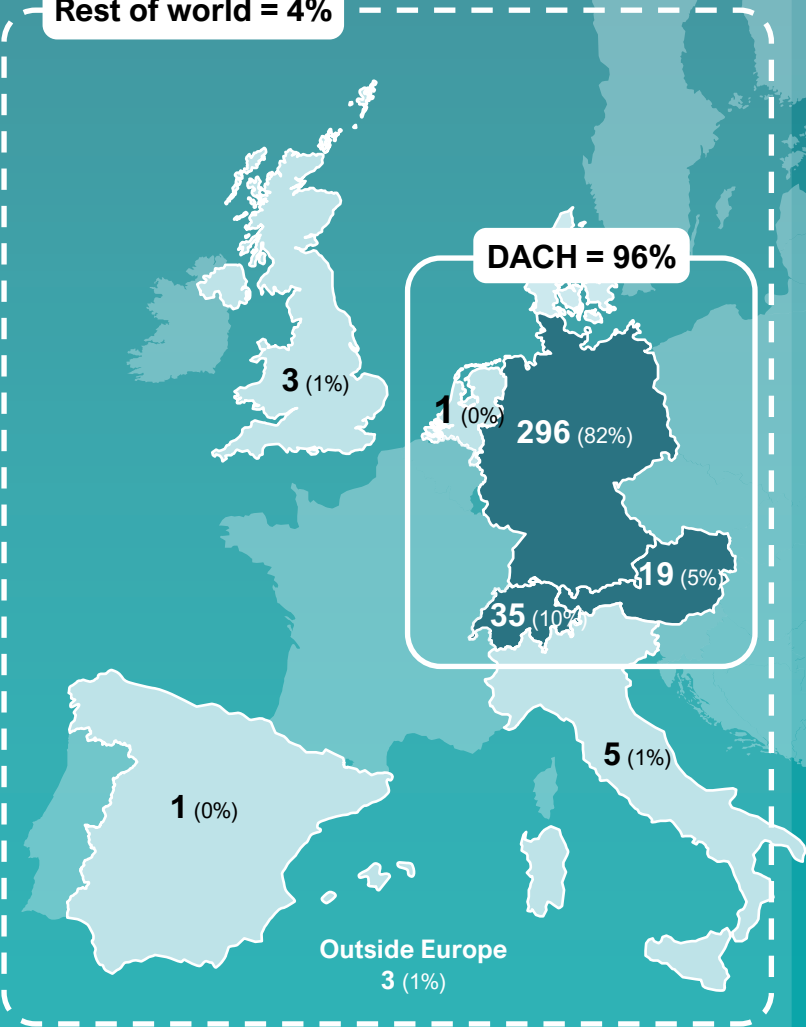


Industries



Rest of world = 4%

DACH = 96%

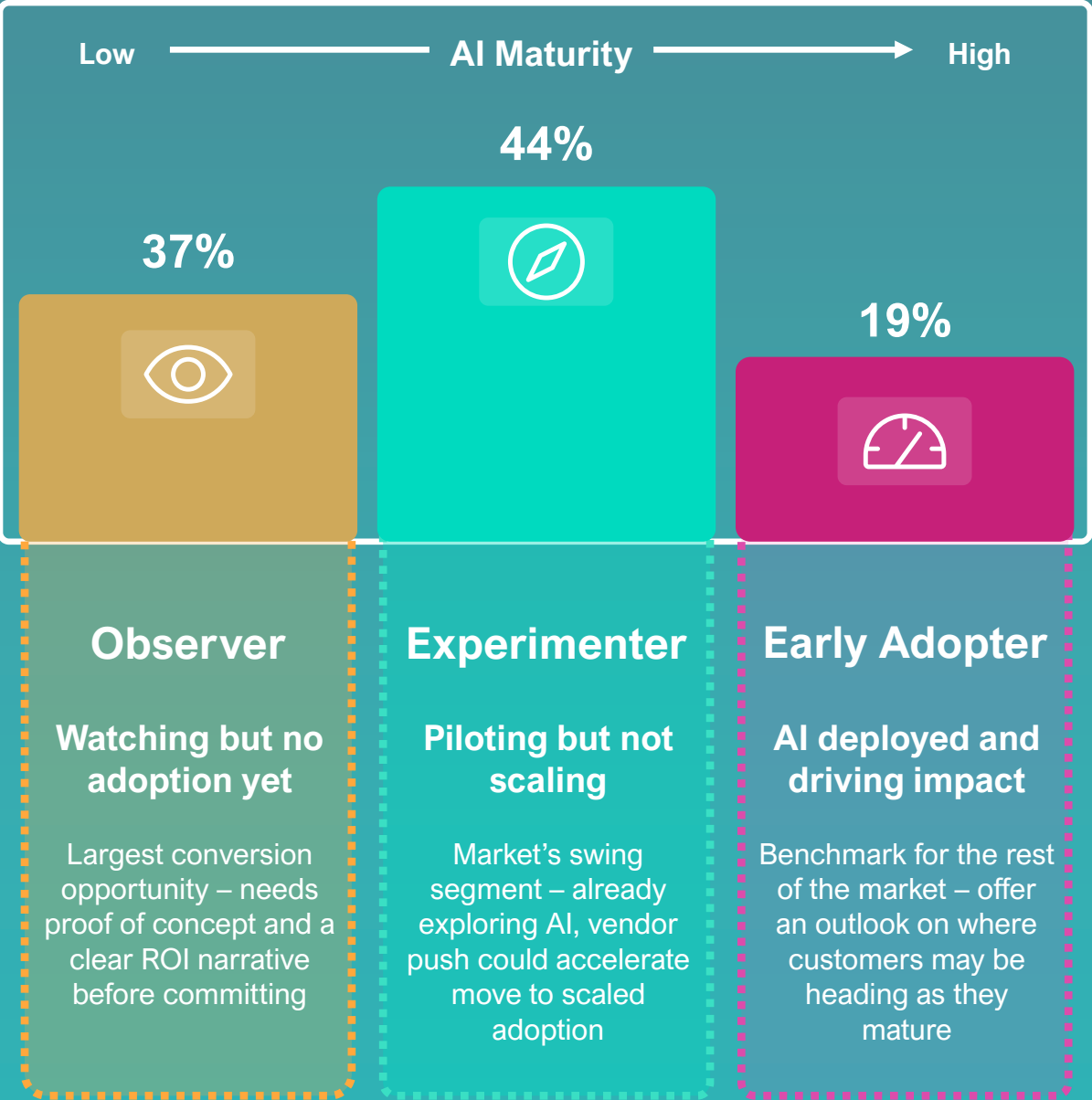


Three stages of maturity

across the respondents, with 63% already exploring AI solutions

AI personas¹

Characteristics of personas by AI adoption maturity, % distribution of respondents



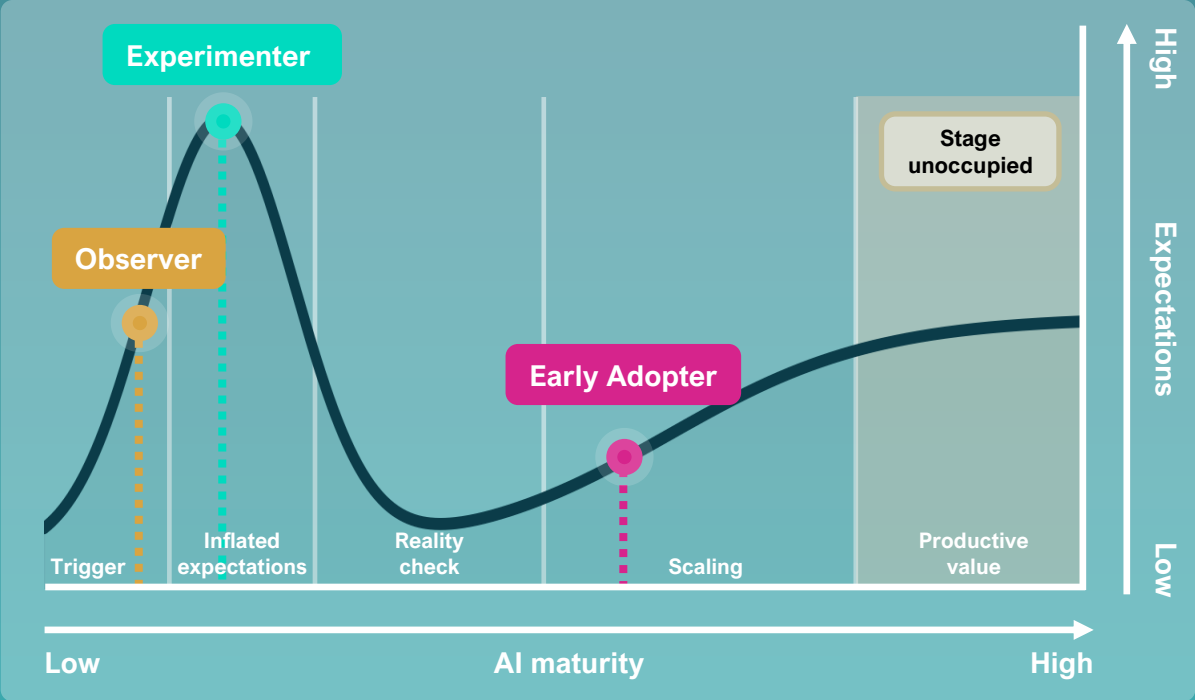
¹AI personas based on current AI adoption and self-assessed AI maturity

Adoption still far from mature

as most customers, incl. Early Adopters, are not yet using AI at scale

Adoption follows hype cycle

Expectations vs. value across the maturity journey



Characterisation of AI personas

Observer

Expectations being formed

Observers engage little with AI. Without hands-on experience there is no basis on which expectations could be built.

Experimenter

High testing, peak expectations

Experimenters test extensively, activity that signals high expectations. Broader adoption, however, requires a level of trust they have to build.

Early Adopter

Broad deployment, open ROI

Early Adopters have tested extensively and understood where AI creates value. Measurable returns, however, have yet to follow.

Four core topics covered

that today’s software CEOs should think through

Chapter I	Pages	7 - 12
	Disruption risk Are software incumbents at risk?	89% consider existing software vendors as primary AI source
Chapter II	Pages	13 - 15
	Revenue potential Where is the monetisation opportunity?	92% plan to increase software spending over 2–3 years
Chapter III	Pages	16 - 19
	Convincing buyers What do customers value the most?	48% cite trust and expertise as main adoption barriers
Chapter IV	Pages	20 - 24
	Product proposition How should AI be productised?	78% use or plan to use AI automation features

Chapter I

Disruption risk

Are software incumbents at risk?

89%

consider existing software
vendors as primary AI source

Buyers are already convinced

of the significant impact AI has on their business

Anticipated AI impact on...

How respondents rate the impact of AI on their organisation, % of respondents

Work & processes

82%

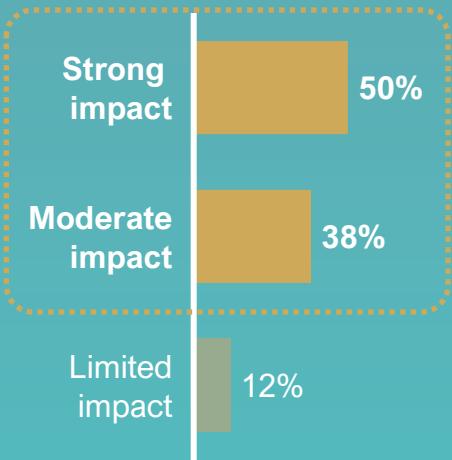
expect at least moderate
impact on how their
company works



Competitiveness

88%

expect at least moderate
impact on their
competitiveness



8 / 10

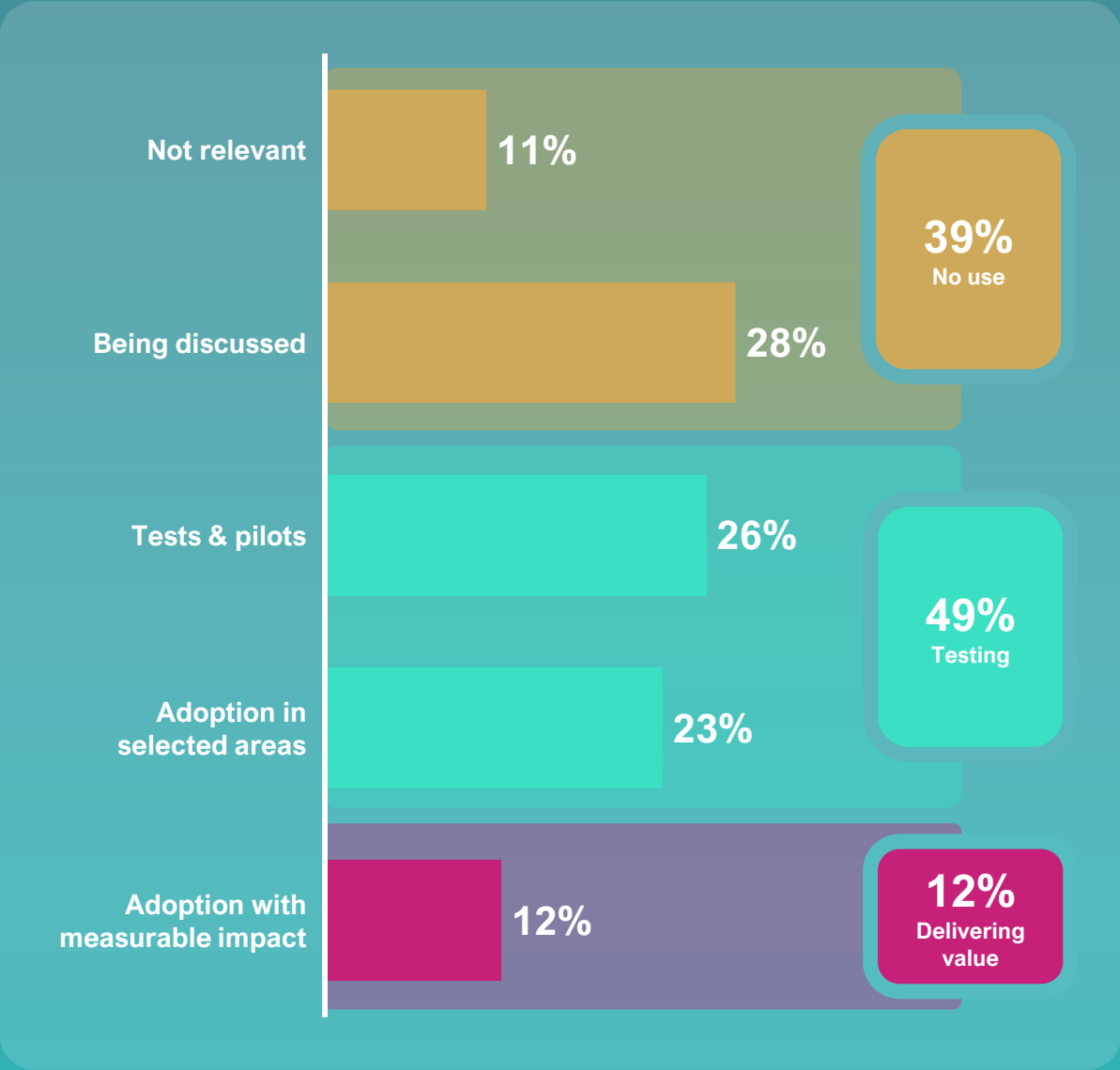
respondents expect at least moderate, mostly strong
AI impact on how they work (82%) and their
competitiveness (88%)

The impact gap is your entry

Only a few reached measurable value, vendors who close the gap win

Current AI adoption

How AI is currently used across the organisation, % of respondents



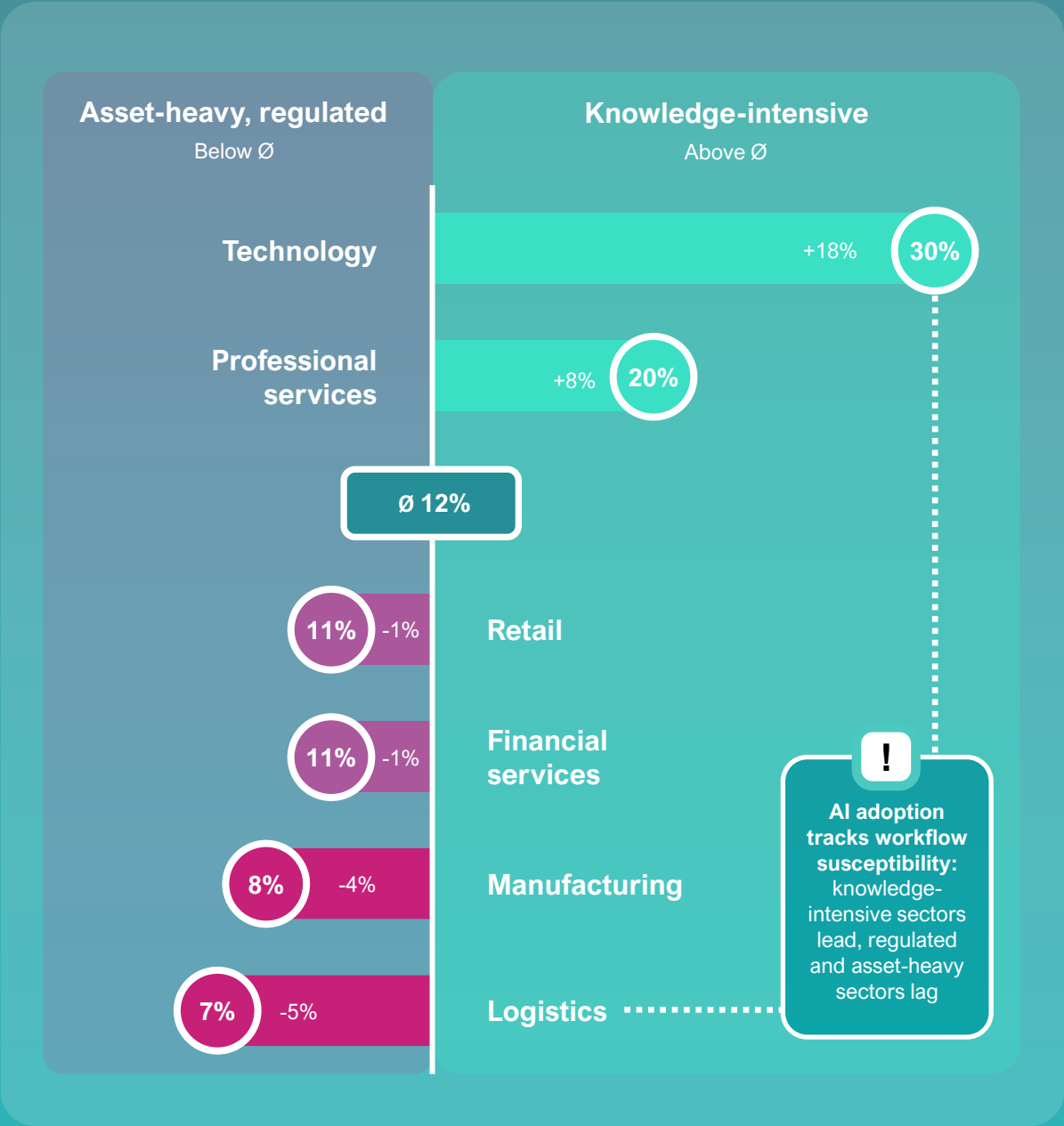
! Despite 61% already deploying AI, only 12% report measurable impact

Adoption varies by industry

White space across industries shows untapped potential

Differences among industries

Adoption by industry, deviation from 12% DACH average and absolute adoption in %

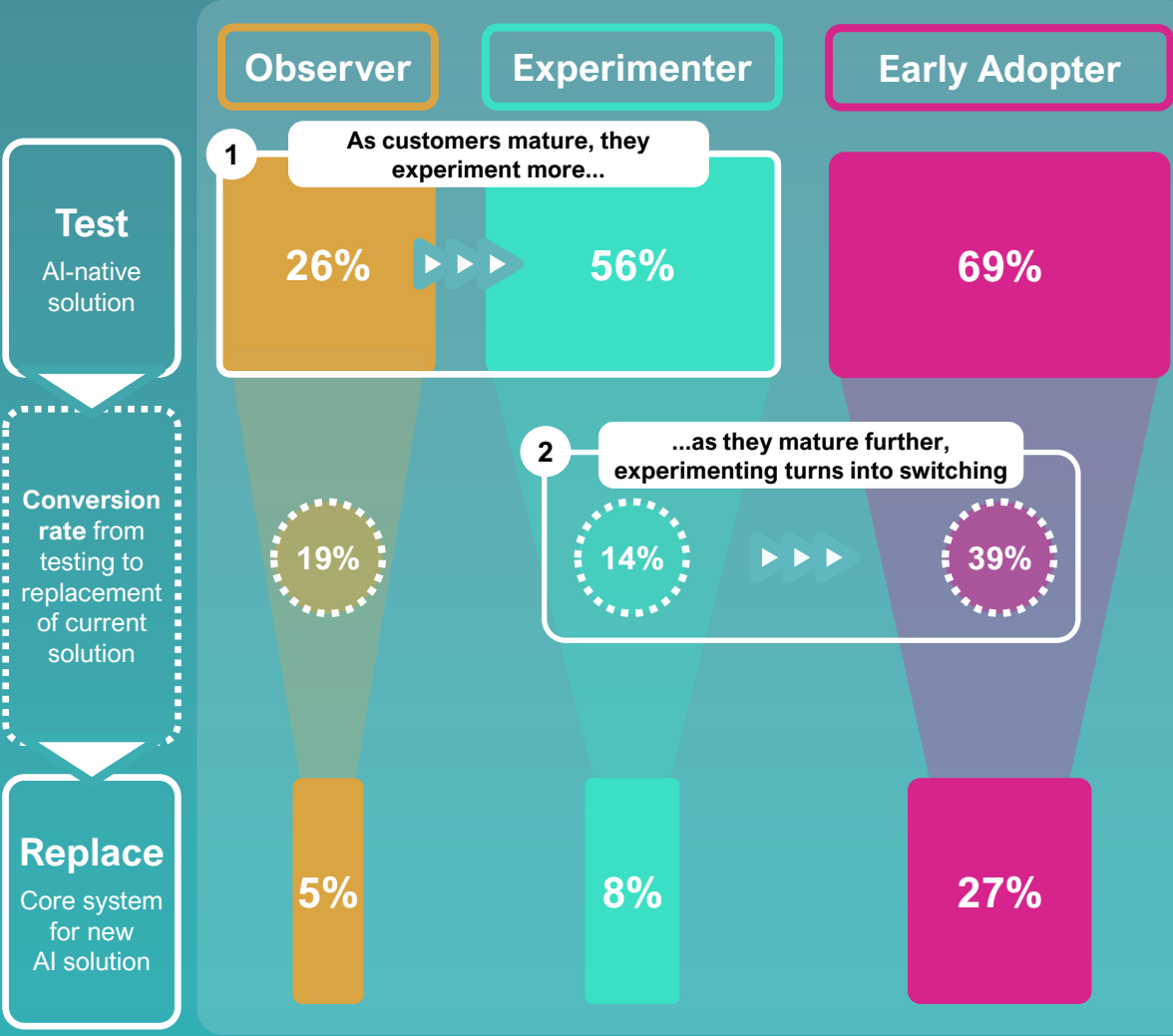


Be part of the evaluation, fast

Influence the choice while it is being formed, not after it is settled...

Adoption funnel by maturity

Switching or considering switching core software due to AI capabilities, % of respondents



Journey

1 Testing comes first

Experimenters ramp up testing of AI products. This is when to position new AI products as they become more open to buying them.

2 Adoption follows testing

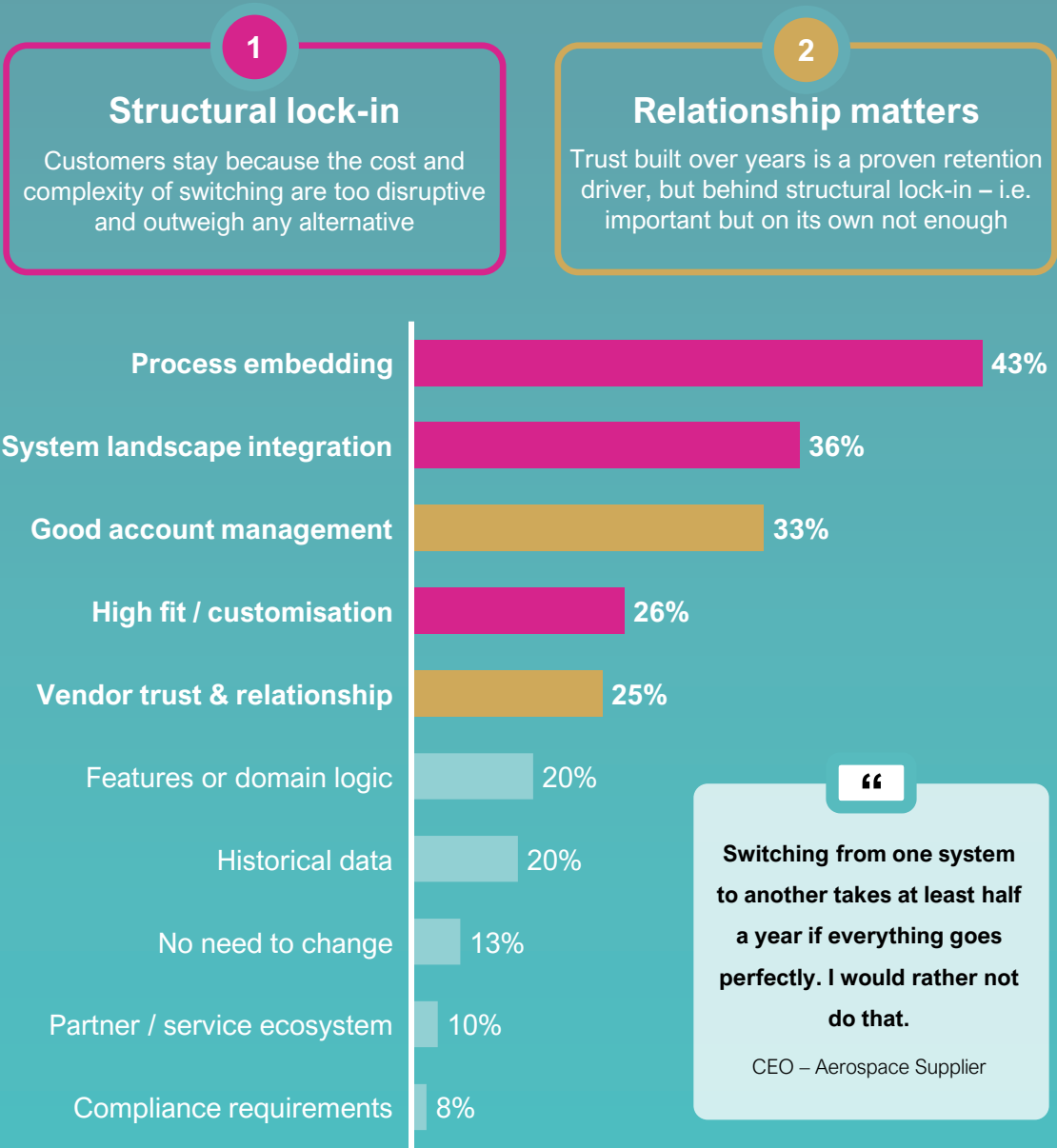
Early Adopters are approx. 5x more likely to switch. Identifying and retaining them before they leave is essential.

...while moats benefit vendors

Deep integration and trust are key moats – defend them deliberately

Stickiness factors to stay with existing vendors

Factors binding companies to existing vendors, % of top 3 mentions

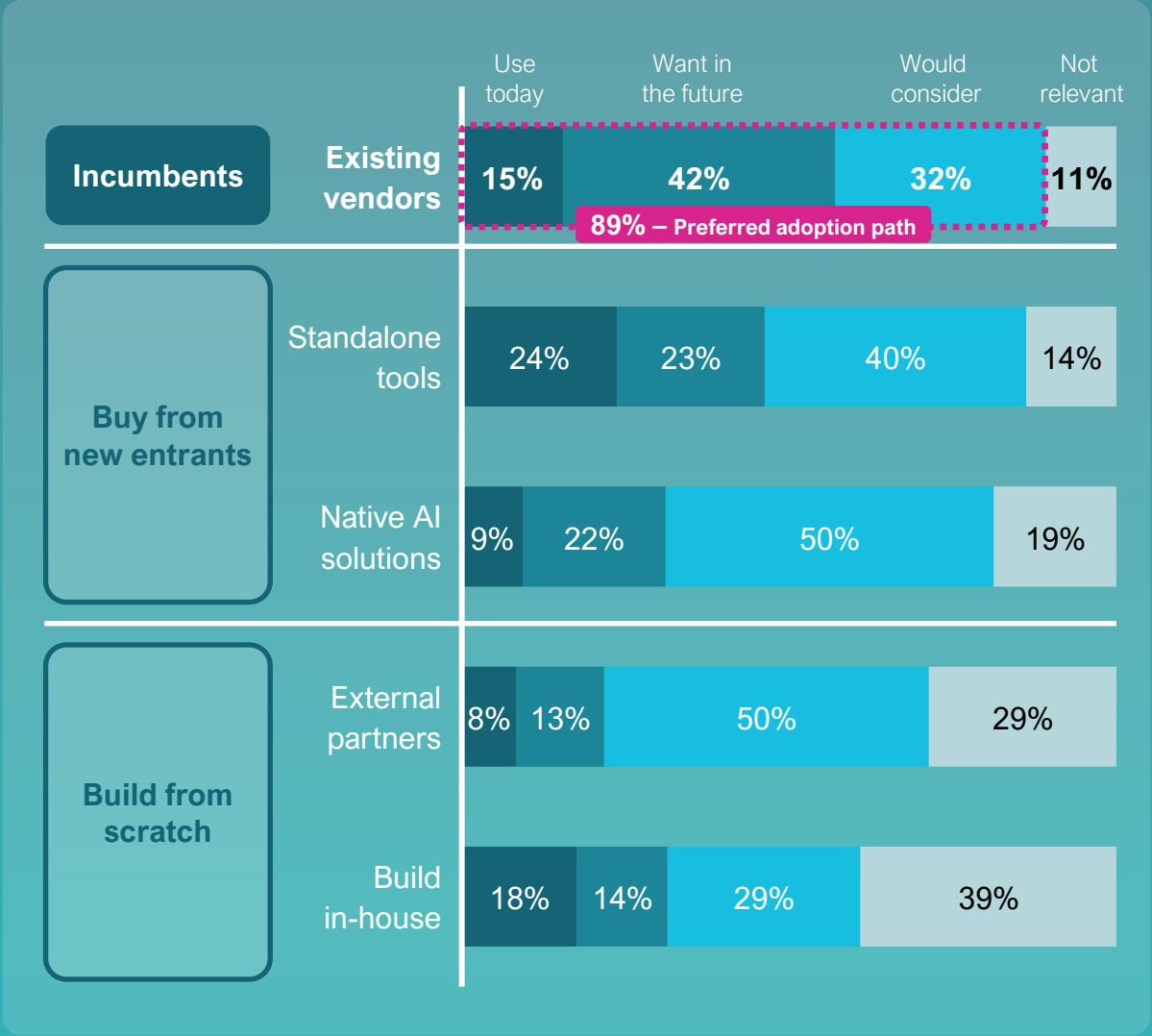


Buyers want to stay

Existing vendors are the default choice, unless they fail to deliver AI

Preferred sources of AI products

Who companies want to buy AI products from, % of respondents



!

Customers look to their existing vendors for AI first.
That is the incumbents' opportunity – but only if they act on it.

Chapter II

Revenue potential

Where is the monetisation opportunity?

92%

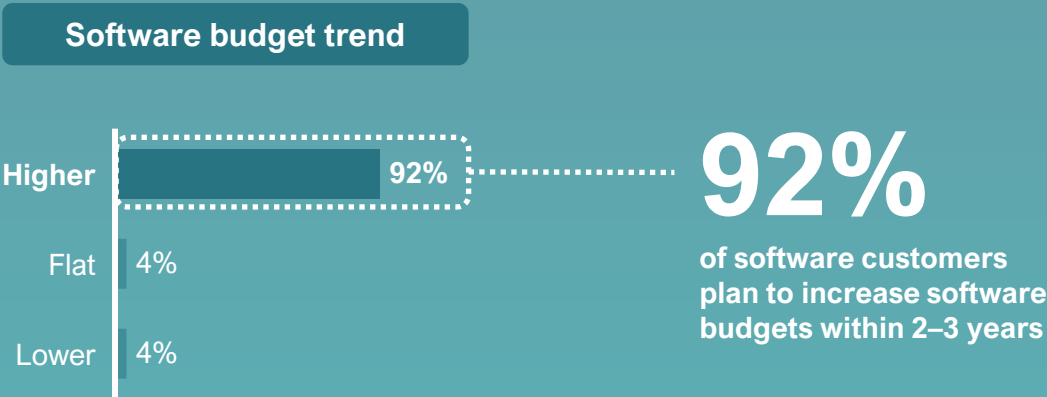
plan to increase software
spending over 2–3 years

The money follows AI maturity

as almost all expect substantially higher software budgets

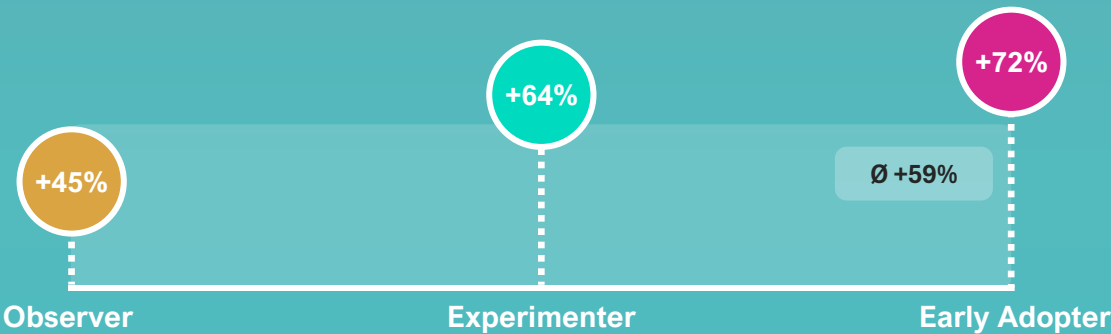
Software budgets are expected to grow...

Estimated development of software budget over the next 2–3 years, % of respondents



...by +59% on average in 2-3 years

Average budget increase over the next 2–3 years, by AI persona, Ø increase in %



! Higher AI maturity drives greater willingness to invest

The budget shift is your pitch

Win by proving your AI frees up more capacity than it costs

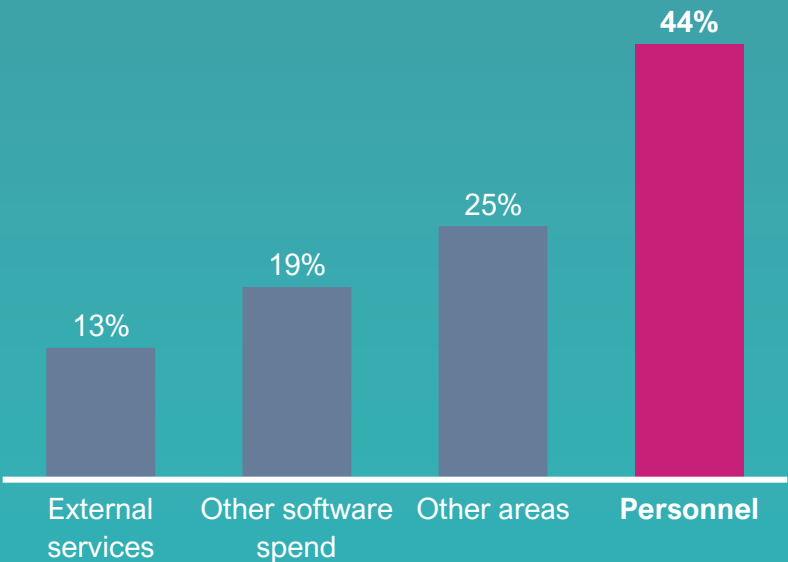
AI is mostly funded by reallocating budgets

Sources for increasing the software budget, % of respondents



Reallocated budgets come primarily from personnel

Reallocation sources, % of respondents



“

I do not see us taking AI funds from the software budget. I think we are heading toward cutting staff. That is just the way things are.

CFO – Industrial Engine Distributor

!

With 13 million German workers retiring from the labour market by 2040¹, AI could ease talent scarcity – meaning personnel budgets, to some extent, become AI budgets

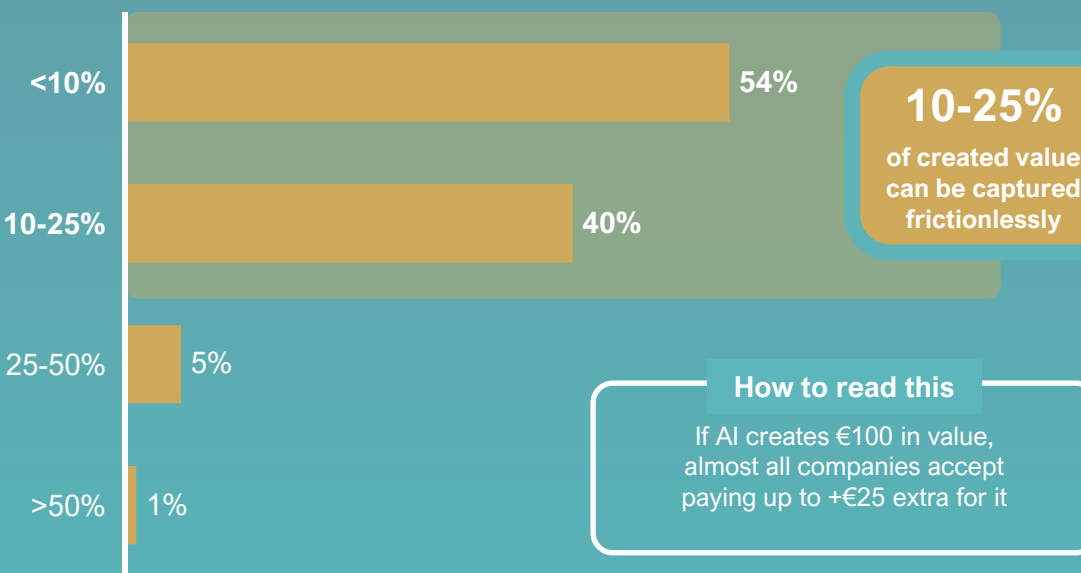
¹ Statistisches Bundesamt, 2026

Price AI on proven value

Visible ROI unlocks the premium, and WTP grows with adoption

The premium companies are willing to pay for AI

Premium acceptable to customers for additional AI capabilities, as a % of the value it creates



What does this mean for software vendors?

Value must be visible

Without a clear Return on Investment (ROI), customers have no business case for paying an AI premium. **Vendors must prove AI's economic value.**

WTP grows with adoption

As customers adopt AI more widely, they unlock additional value – driving broader adoption. Savings lag behind capacity gains, so initial willingness to pay (WTP) understates long-term value. This aligns with the finding that willingness to invest rises with AI maturity: Early Adopters plan higher software spending than peers.

Chapter III

Convincing buyers

What do customers value the most?

48%

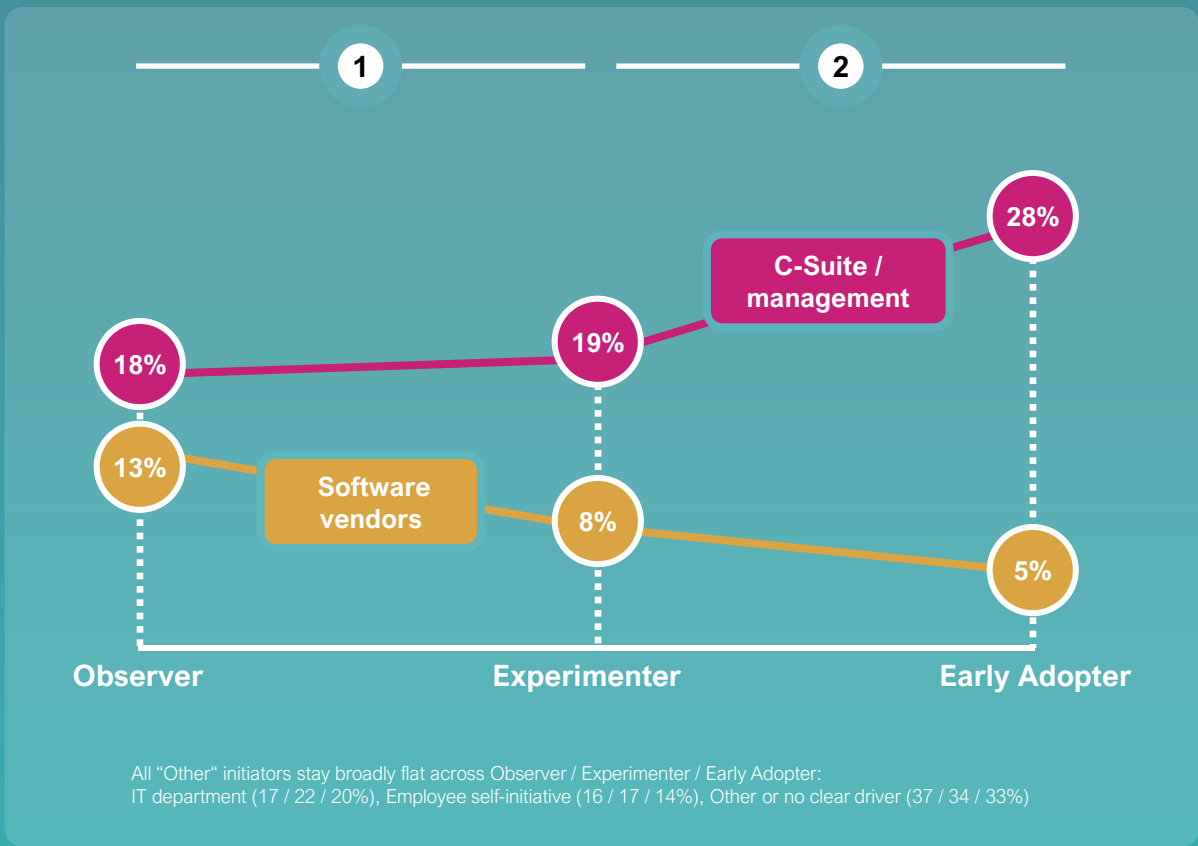
cite trust and expertise as
main adoption barriers

Management drives adoption

Mature buyers act on their own, Observers need external guidance

The initiators of the first AI impulse

AI initiator, % of respondents, by AI persona



1 Vendor window

Existing vendors matter most as a source of the AI impulse – the faster AI products are presented, the better

2 Management-led adoption

Management drives the shift from testing to strategic scaling – vendors should be their guides

Deciders look at their vendors

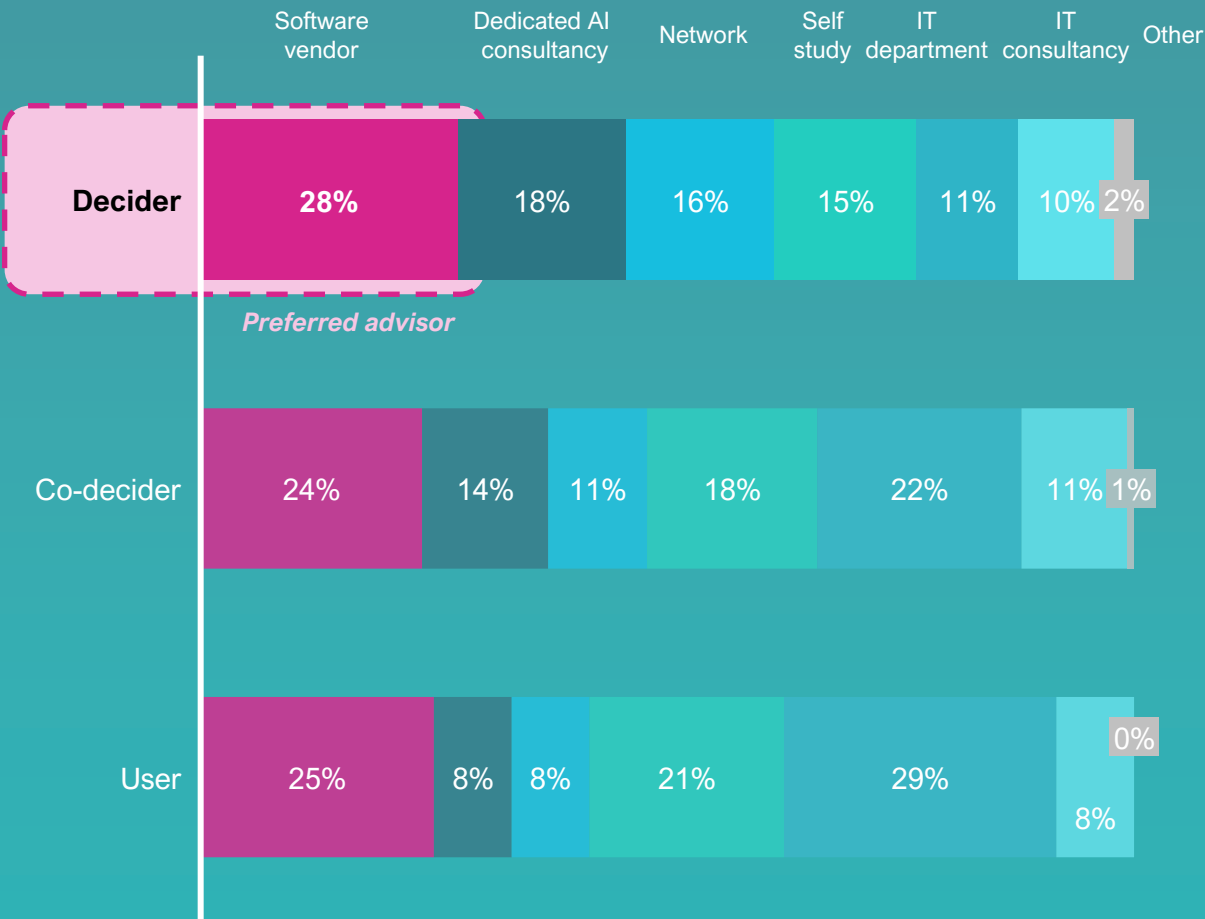
for guidance on AI adoption – window of opportunity

The trusted sources for AI advice

Top AI advisors by IT purchasing role, % share of responses

Become the go-to advisor early

Software vendors have the most direct influence on customers in the Observer and Experimenter stages. Beyond these early phases, reaching deciders becomes harder.
(as outlined on the previous page)

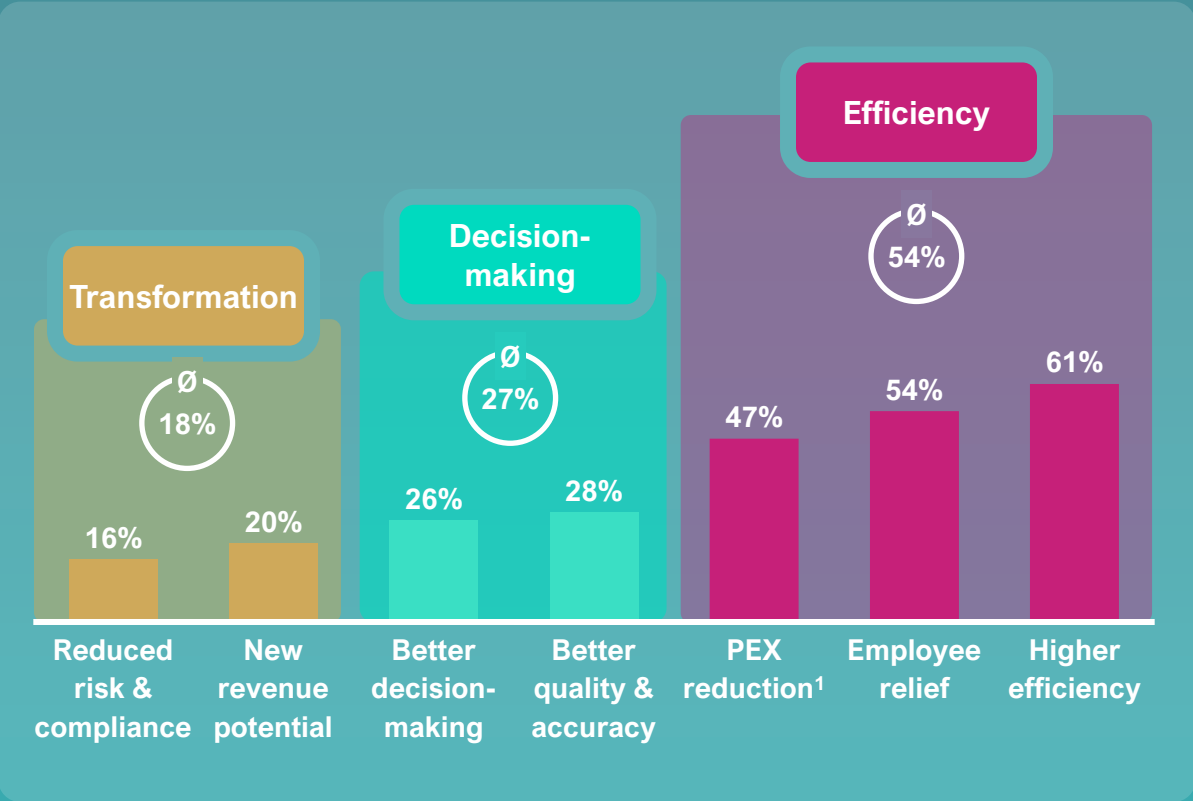


Quantify AI in hours and euros

as decision-makers expect efficiency when buying AI products

Expected benefits from AI adoption

Benefits cited by decision-makers, % of top 3 mentions



“

Technician time saved by AI is the value – it translates directly to customer value and scalability.

CEO – IT Services Provider

Sell AI with value

Deciders rank efficiency 3x higher than transformation promises and increasingly need quantified efficiency gains to justify AI investments.

¹ Personnel Expenses (PEX) refer to payroll costs

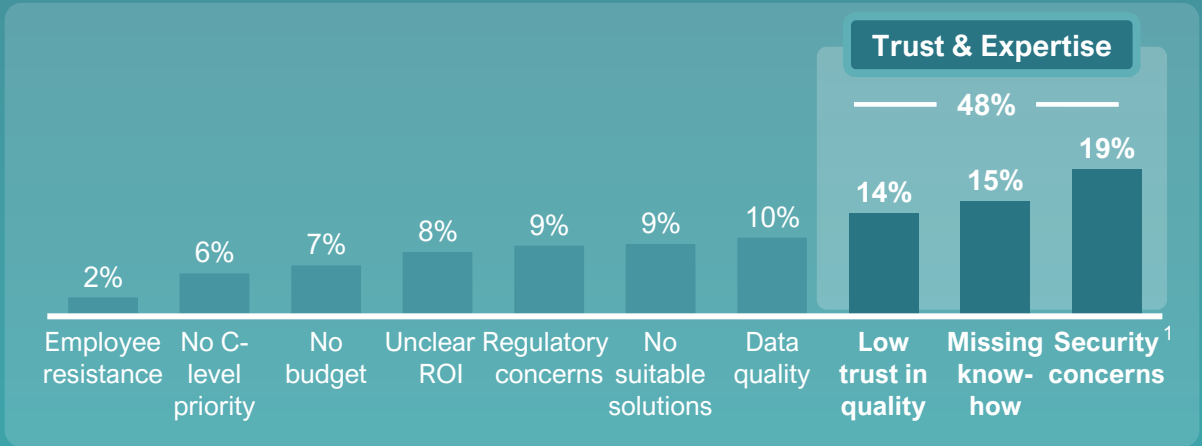
Understand the pain points

by maturity – trust comes first, data quality later

Trust and expertise are the key AI adoption barriers...

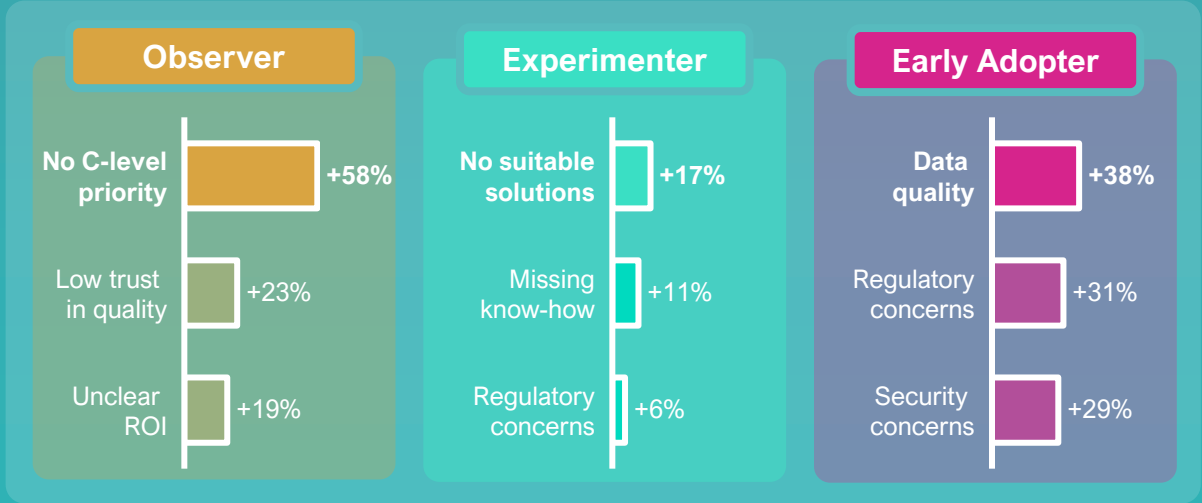
Most relevant barriers to adopting AI applications, % of top 3 mentions

! AI adoption barriers are not structural, they can be overcome



...but barriers differ by adoption maturity

Distribution of barrier mentions by persona vs. average, % deviation from average



¹ Figures do not sum to 100% due to rounding effects

Chapter IV

Product proposition

How should AI be productised?

78%

use or plan to use AI
automation features

No AI, no contract renewal

AI strategy is a crucial retention requirement, not (just) an upsell

The drivers of customer loyalty

Long-term retention drivers, % of respondents ranking each driver in top 3

1

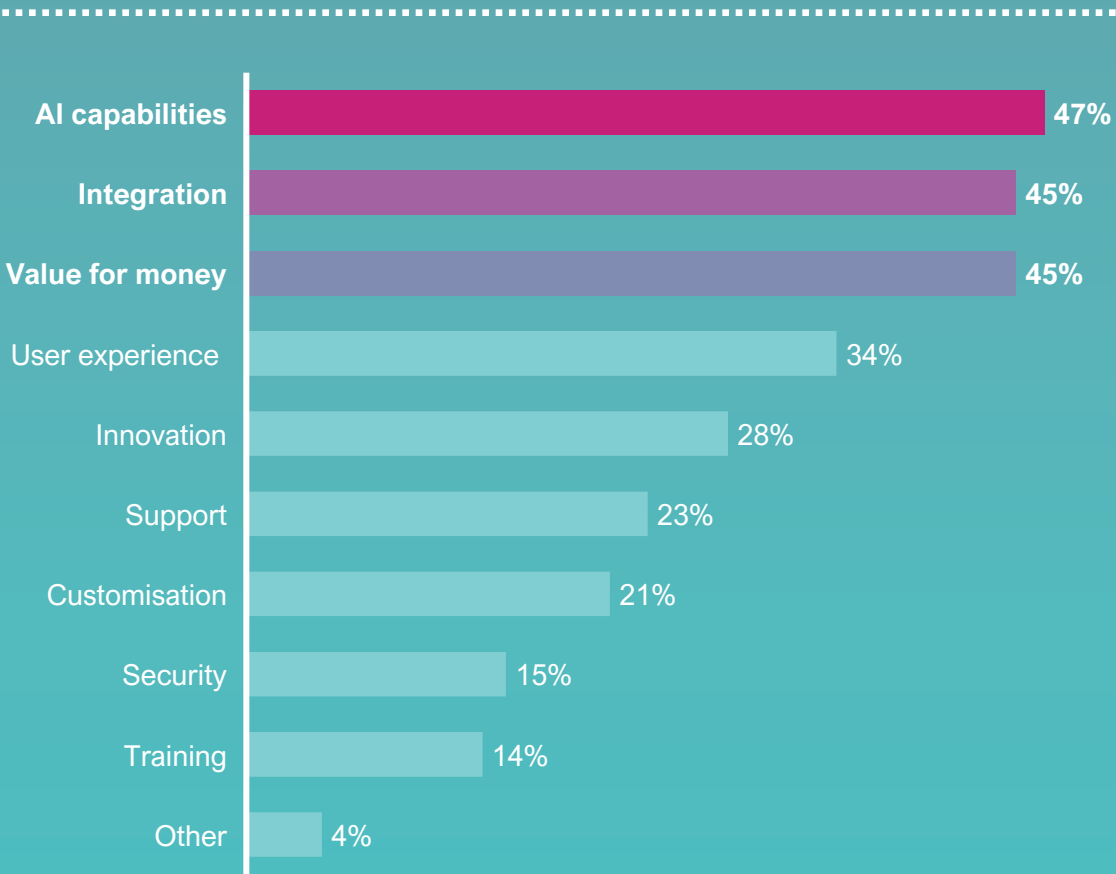
AI is not a choice
Customers expect AI features to be built into products

2

Integration lock-in
Seamless integration creates lock-in and raises switching barriers

3

Prove the ROI
AI features must deliver tangible value to justify price adjustments

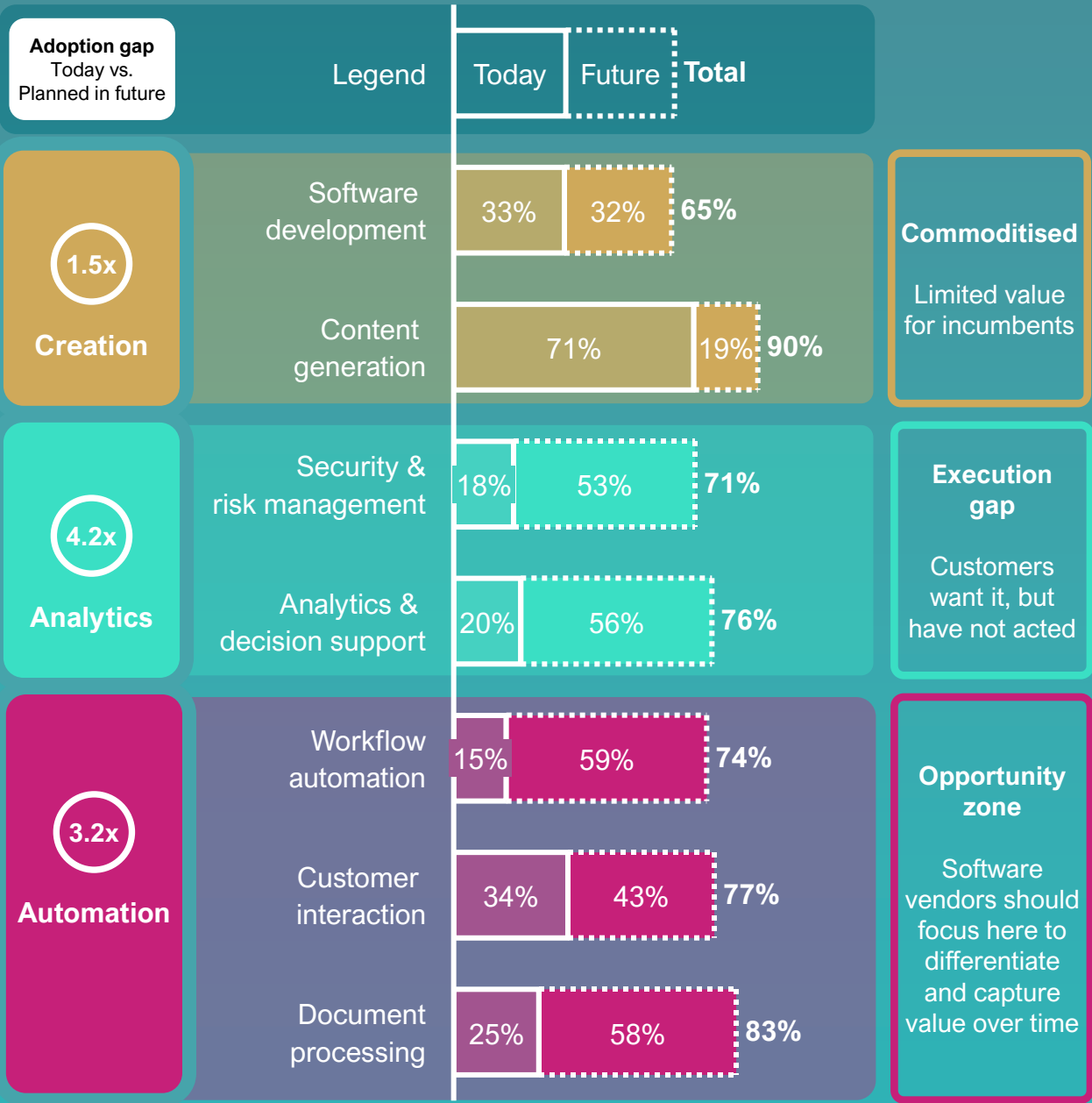


Automation and analytics

are the next frontier – customers already master generic use cases

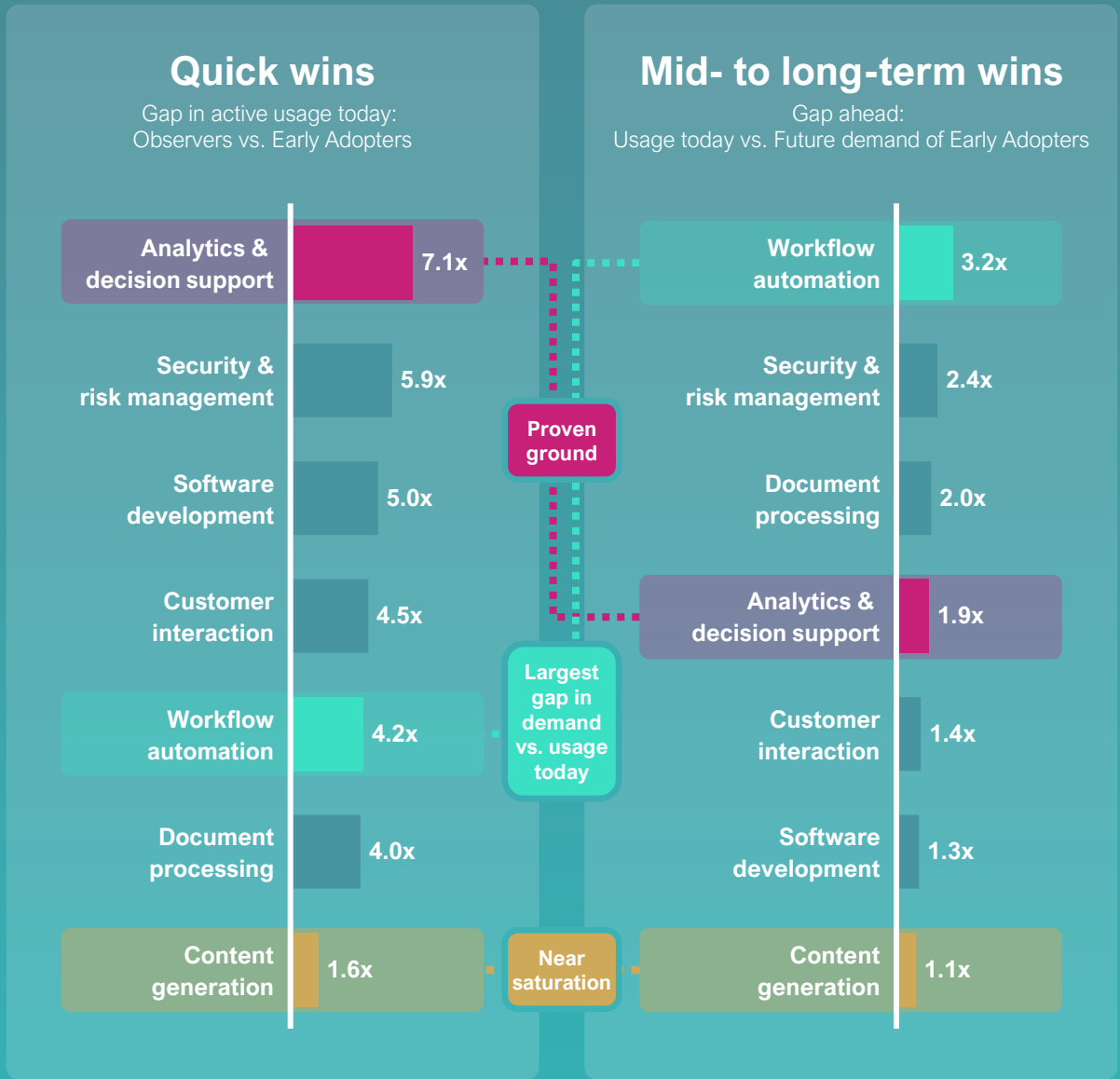
AI adoption (today and demand) across use cases

Current vs. planned AI usage in the future by category, % of respondents



Quick wins first, upside next

The lasting value has shifted to workflows and insights



How to read this

Calculated as Early Adopters' usage today compared to Observers' usage today. Shows proven demand Observers can quickly catch up to.

Calculated as Early Adopters' future demand compared to their usage today. Shows the gap vendors still need to build for.

AI use cases in our portfolio

Already live, already delivering measurable impact

Representation of our portfolio companies

Talk to the companies behind the cases if you want to learn more



Root Cause Identification



stonebranch

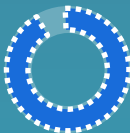
Challenge

When automation fails, teams manually investigate the error across multiple sources to find the root cause.

AI Use Case

An AI agent analyses the error across sources to identify the root cause and suggest remediation.

Problem Solving Speed



-90%

Time reduction from hours to minutes



Personal Shopping Assistant

CONVOTIS

Challenge

In large online assortments, shoppers are overwhelmed by the selection and abandon their cart before checkout.

AI Use Case

InnoFind reads taste attributes from product images. A few likes reveal the shopper's style, no user profile needed.

Positive User Rating

85%

Live in 11 countries with +1 M users



Automated Document Processing

 Textile
Solutions Group

Challenge

Orders from customers arrive as PDFs, emails, and size / colour matrices. Staff retype every line in the ERP by hand.

AI Use Case

AI reads textile documents, including article hierarchies, and creates the sales order directly in the systems.

Time Saving per Order¹

-80%



From 10 to 2 minutes per order

¹ For the TSG use case, the impact is estimated with the average order processing time dropping from 10 minutes to 2 minutes with AI-assisted processing.

AI use cases in our portfolio

Already live, already delivering measurable impact

Representation of our portfolio companies

Talk to the companies behind the cases if you want to learn more



AI Decision Intelligence



Challenge

Warehouse teams manually search systems or call support for information, slowing decisions when priorities shift.

AI Use Case

AI-Control-Center answers via chat, delivers real-time KPIs, flags deviations, and triggers workflows like re-routing.

Faster Decision-Making¹

-85%

Live data & AI insights



AI Inventory Forecasting



Challenge

Category managers at wholesalers plan tens of thousands of SKUs manually – every day, list by list.

AI Use Case

AI forecast predicts demand per SKU and generates daily order proposals; planners review only the exceptions.

Less Replenishment Effort

-75%

Automated demand forecasting



Dynamic Pricing Agent



Challenge

Hotel pricing must react to demand, competitors and market trends, usually through manual monitoring.

AI Use Case

Eddie, the AI agent, monitors the market in real time and adjusts pricing, backed by 50+ specialised subagents.

Revenue Potential

+25%

Base revenue

Additional

¹ Estimate: AI-assisted chat, KPIs & automated recommendations reduce operational-information workflow from multiple steps to one guided interaction

Beyond the Hype – AI Adoption in B2B Software

Disruption risk	Revenue potential	Convincing buyers	Product proposition
61% of customers already use AI	92% plan to increase software spend	28% of deciders see vendors as top AI advisor	47% want more AI from vendors to stay
27% of Early Adopters switched to an AI solution	94% are willing to pay up to 25% AI premium	61% of deciders see efficiency as key AI benefit	78% use or plan to use AI in automation
Growing AI demand drives customer testing. Vendors hold the advantage but must move fast or risk falling behind.	Software budgets are rising, but customers only pay more if value and use cases are clear.	C-level drives AI adoption; vendors must engage leadership with tailored messaging.	Customers expect AI features – demand shifts from generation towards analytics and automation.

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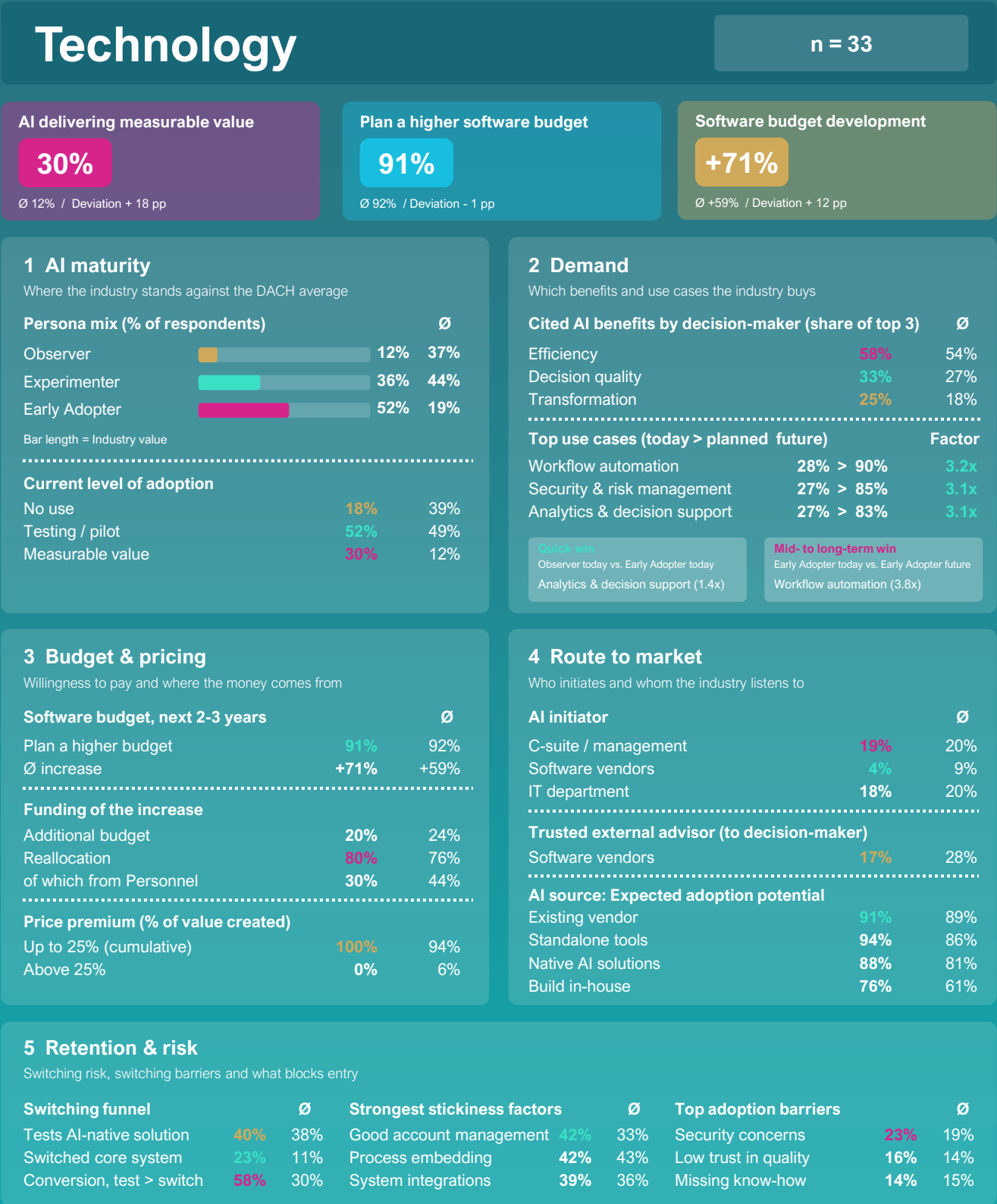


If you would like to discuss any aspects of our work?

Contact us via info@elvaston.com or reach out to our authors

Where else to find us

www.elvaston.com



What this means for vendors

- 1 Product

Build workflow automation first. It is the top use case today and what Early Adopters plan to buy next. These buyers adopt fast, but drop tools that are not part of their daily work.
- 2 Pricing

Include AI in the base price and fund it from budget these buyers already have. They plan the biggest budget increases of any industry but are the least willing to pay a premium on top.
- 3 Go-to-market

Sell with technical proof, not advisory promises. These buyers trust vendors least and may test tools themselves or build in-house, so get involved early.

Professional Services

n = 41

AI delivering measurable value

20%

Ø 12% / Deviation + 8 pp

Plan a higher software budget

88%

Ø 92% / Deviation - 4 pp

Software budget development

+59%

Ø +59% / Deviation ± 0 pp

1 AI maturity

Where the industry stands against the DACH average

Persona mix (% of respondents)

		Ø
Observer		30% 37%
Experimenter		45% 44%
Early Adopter		25% 19%

Bar length = Industry value

Current level of adoption

No use	28%	39%
Testing / pilot	52%	49%
Measurable value	20%	12%

2 Demand

Which benefits and use cases the industry buys

Cited AI benefits by decision-maker (share of top 3)

Efficiency	81%	54%
Decision quality	24%	27%
Transformation	20%	18%

Top use cases (today > planned future)

		Factor
Workflow automation	28% > 83%	3.0x
Analytics & decision support	29% > 76%	2.6x
Security & risk management	32% > 81%	2.5x

Quick win

Observer today vs. Early Adopter today

Workflow automation (4.5x)

Mid-to long-term win

Early Adopter today vs. Early Adopter future

Security & risk management (2.3x)

3 Budget & pricing

Willingness to pay and where the money comes from

Software budget, next 2-3 years

Plan a higher budget	88%	92%
Ø increase	+59%	+59%

Funding of the increase

Additional budget	27%	24%
Reallocation	73%	76%
of which from Personnel	37%	44%

Price premium (% of value created)

Up to 25% (cumulative)	85%	94%
Above 25%	15%	6%

4 Route to market

Who initiates and whom the industry listens to

AI initiator

C-suite / management	21%	20%
Software vendors	10%	9%
IT department	30%	20%

Trusted external advisor (to decision-maker)

Software vendors	23%	28%
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AI source: Expected adoption potential

Existing vendor	93%	89%
Standalone tools	98%	86%
Native AI solutions	78%	81%
Build in-house	61%	61%

5 Retention & risk

Switching risk, switching barriers and what blocks entry

Switching funnel

Tests AI-native solution	41%	38%
Switched core system	16%	11%
Conversion, test > switch	38%	30%

Strongest stickiness factors

Process embedding	51%	43%
Vendor trust	39%	25%
Good account management	37%	33%

Top adoption barriers

Security concerns	24%	19%
Low trust in quality	17%	14%
Missing know-how	14%	15%

What this means for vendors

1 Product

Sell security and risk management first, the biggest use case today. Then add workflow automation: it grows fastest (28% to 83%) and most separates Early Adopters from Observers.

2 Pricing

Budgets here grow only at the average rate, so charge for the value you create instead. 15% of buyers accept paying more than a quarter of that value, versus 6% across DACH.

3 Go-to-market

Win the IT department first: it initiates AI decisions 30% of the time, well above the DACH average of 20%. It trusts vendors less than average, so lead with technical proof.

Source: Elvaston Capital Management & OC&C Strategy Consultants, "AI Adoption in B2B Software" 2026; n = 360+ executives, DACH 96%, fielded Apr – Jun 2026. Rounded figures.

Retail

n = 107

AI delivering measurable value

11%

Ø 12% / Deviation - 1 pp

Plan a higher software budget

97%

Ø 92% / Deviation + 5 pp

Software budget development

+59%

Ø +59% / Deviation ± 0 pp

1 AI maturity

Where the industry stands against the DACH average

Persona mix (% of respondents)

		Ø
Observer		38% 37%
Experimenter		47% 44%
Early Adopter		15% 19%

Bar length = Industry value

Current level of adoption

No use	43%	39%
Testing / pilot	46%	49%
Measurable value	11%	12%

2 Demand

Which benefits and use cases the industry buys

Cited AI benefits by decision-maker (share of top 3)

Efficiency	55%	54%
Decision quality	24%	27%
Transformation	13%	18%

Top use cases (today > planned future)

		Factor
Workflow automation	13% > 69%	5.6x
Document processing	18% > 81%	4.6x
Security & risk management	14% > 59%	4.1x

Quick win

Observer today vs. Early Adopter today

Security & risk management (8.9x)

Mid- to long-term win

Early Adopter today vs. Early Adopter future

Workflow automation (4.7x)

3 Budget & pricing

Willingness to pay and where the money comes from

Software budget, next 2-3 years

Plan a higher budget	97%	92%
Ø increase	+59%	+59%

Funding of the increase

Additional budget	19%	24%
Reallocation	81%	76%
of which from Personnel	56%	44%

Price premium (% of value created)

Up to 25% (cumulative)	91%	94%
Above 25%	9%	6%

4 Route to market

Who initiates and whom the industry listens to

AI initiator

C-suite / management	21%	20%
Software vendors	10%	9%
IT department	21%	20%

Trusted external advisor (to decision-maker)

Software vendors	34%	28%
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AI source: Expected adoption potential

Existing vendor	91%	89%
Standalone tools	90%	86%
Native AI solutions	79%	81%
Build in-house	64%	61%

5 Retention & risk

Switching risk, switching barriers and what blocks entry

Switching funnel

Tests AI-native solution	36%	38%
Switched core system	10%	11%
Conversion, test > switch	29%	30%

Strongest stickiness factors

Process embedding	42%	43%
System integrations	35%	36%
Good account management	30%	33%

Top adoption barriers

Security concerns	17%	19%
Missing know-how	14%	15%
Unclear ROI	12%	8%

What this means for vendors

1 Product

Lead with document processing, the biggest use case today (18%) and in future (81%). Add workflow automation next: it grows fastest, from 13% to 69%.

2 Pricing

Nearly all buyers plan a bigger budget (97%), but 81% of it is reallocated, mostly from personnel. Price against proven efficiency savings: unclear ROI blocks more buyers here than average.

3 Go-to-market

Sell advisory-led: 34% name software vendors as their most trusted advisor, against 28% across DACH. With 42% not yet using AI, guide them from first pilot to measurable savings.

Source: Elvaston Capital Management & OC&C Strategy Consultants, "AI Adoption in B2B Software" 2026; n = 360+ executives, DACH 96%, fielded Apr – Jun 2026. Rounded figures.

Manufacturing

n = 67

AI delivering measurable value

8%

Ø 12% / Deviation - 4 pp

Plan a higher software budget

88%

Ø 92% / Deviation - 4 pp

Software budget development

+61%

Ø +59% / Deviation + 2 pp

1 AI maturity

Where the industry stands against the DACH average

Persona mix (% of respondents)

		Ø
Observer		44% 37%
Experimenter		44% 44%
Early Adopter		12% 19%

Bar length = Industry value

Current level of adoption

No use	41%	39%
Testing / pilot	51%	49%
Measurable value	6%	12%

2 Demand

Which benefits and use cases the industry buys

Cited AI benefits by decision-maker (share of top 3)

Efficiency	67%	54%
Decision quality	19%	27%
Transformation	16%	18%

Top use cases (today > planned future)

		Factor
Workflow automation	7% > 80%	11.0x
Analytics & decision support	18% > 80%	4.5x
Document processing	21% > 81%	3.9x

Quick win

Observer today vs. Early Adopter today

Analytics & decision support (15.0x)

Mid- to long-term win

Early Adopter today vs. Early Adopter future

Workflow automation (7.0x)

3 Budget & pricing

Willingness to pay and where the money comes from

Software budget, next 2-3 years

Plan a higher budget	88%	92%
Ø increase	+61%	+59%

Funding of the increase

Additional budget	24%	24%
Reallocation	76%	76%
of which from Personnel	55%	44%

Price premium (% of value created)

Up to 25% (cumulative)	97%	94%
Above 25%	3%	6%

4 Route to market

Who initiates and whom the industry listens to

AI initiator

C-suite / management	17%	20%
Software vendors	9%	9%
IT department	20%	20%

Trusted external advisor (to decision-maker)

Software vendors	33%	28%
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AI source: Expected adoption potential

Existing vendor	93%	89%
Standalone tools	82%	86%
Native AI solutions	88%	81%
Build in-house	63%	61%

5 Retention & risk

Switching risk, switching barriers and what blocks entry

Switching funnel

Tests AI-native solution	40%	38%
Switched core system	10%	11%
Conversion, test > switch	26%	30%

Strongest stickiness factors

Process embedding	42%	43%
System integrations	42%	36%
High fit / customisation	34%	26%

Top adoption barriers

Security concerns	21%	19%
Missing know-how	17%	15%
Data quality	14%	10%

What this means for vendors

1 Product

Start with document processing, the biggest use case today (21%). Then move to workflow automation: just 7% use it now but 80% plan to, the sharpest jump of any use case.

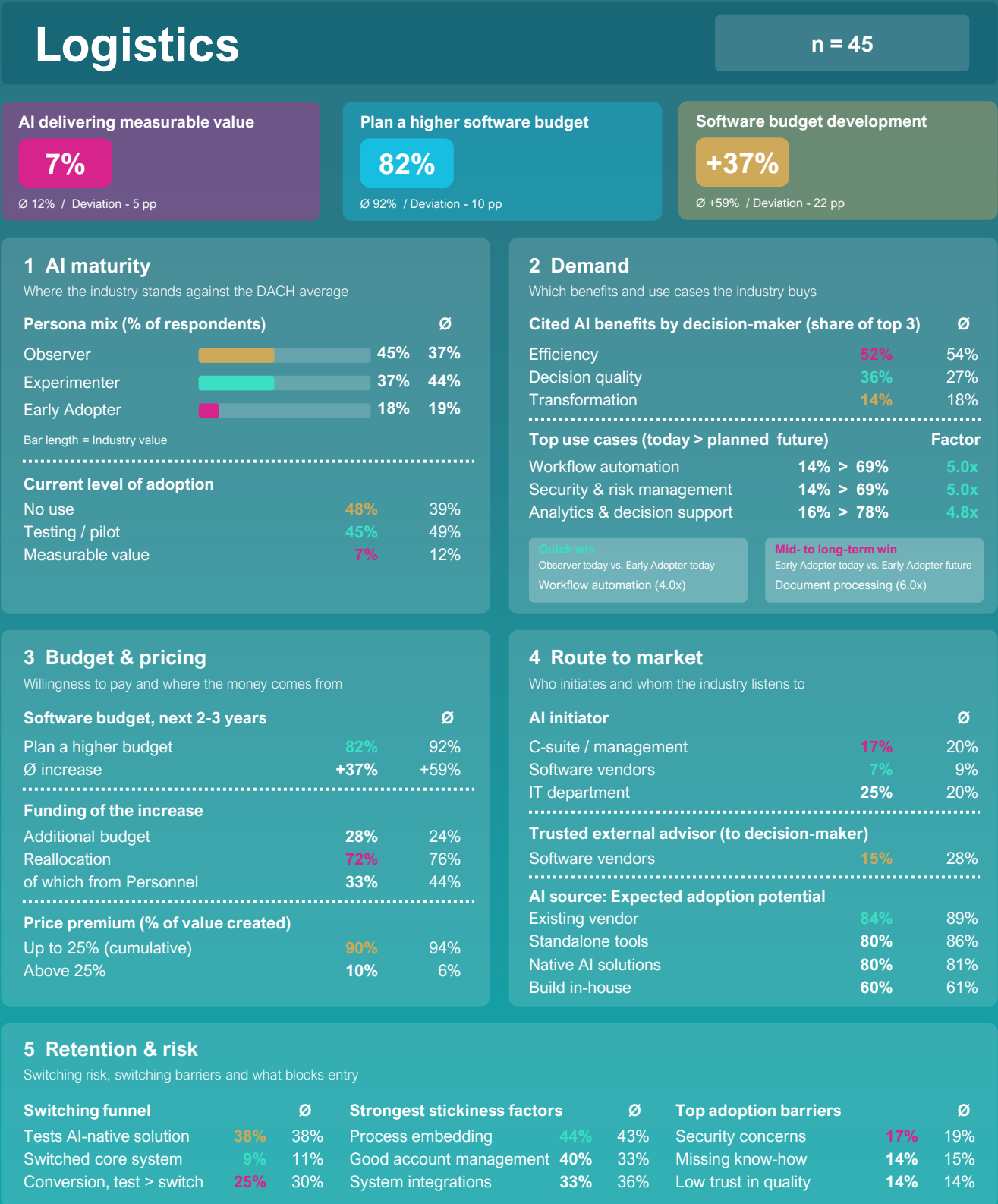
2 Pricing

Keep the price inside the value created: only 3% would pay more than a quarter of it, half the DACH rate. Justify it with efficiency, the top benefit for 67% of buyers.

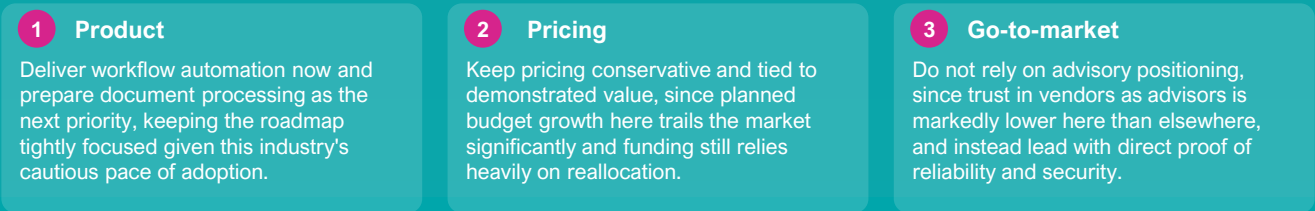
3 Go-to-market

Sell as a trusted advisor: 33% rank software vendors first, against 28% across DACH. Only 8% see measurable value so far, so lead with proof and tackle data quality early.

Source: Elvaston Capital Management & OC&C Strategy Consultants, "AI Adoption in B2B Software" 2026; n = 360+ executives, DACH 96%, fielded Apr – Jun 2026. Rounded figures.



What this means for vendors



Financial Services

n = 9

AI delivering measurable value

11%

Ø 12% / Deviation - 1 pp

Plan a higher software budget

100%

Ø 92% / Deviation + 8 pp

Software budget development

+61%

Ø +59% / Deviation + 2 pp

1 AI maturity

Where the industry stands against the DACH average

Persona mix (% of respondents)

		Ø
Observer		33% 37%
Experimenter		56% 44%
Early Adopter		11% 19%

Bar length = Industry value

Current level of adoption

No use	22%	39%
Testing / pilot	67%	49%
Measurable value	11%	12%

2 Demand

Which benefits and use cases the industry buys

Cited AI benefits by decision-maker (share of top 3)

Efficiency	38%	54%
Decision quality	38%	27%
Transformation	25%	18%

Top use cases (today > planned future)

Workflow automation	11% > 67%	6.0x
Document processing	25% > 88%	3.5x
Analytics & decision support	22% > 67%	3.0x

Quick win

Observer today vs. Early Adopter today

N/A, due to sample size

Mid-to long-term win

Early Adopter today vs. Early Adopter future

N/A, due to sample size

3 Budget & pricing

Willingness to pay and where the money comes from

Software budget, next 2-3 years

Plan a higher budget	100%	92%
Ø increase	+61%	+59%

Funding of the increase

Additional budget	33%	24%
Reallocation	67%	76%
of which from Personnel	50%	44%

Price premium (% of value created)

Up to 25% (cumulative)	100%	94%
Above 25%	0%	6%

4 Route to market

Who initiates and whom the industry listens to

AI initiator

C-suite / management	33%	20%
Software vendors	7%	9%
IT department	7%	20%

Trusted external advisor (to decision-maker)

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5 Retention & risk

Switching risk, switching barriers and what blocks entry

Switching funnel

Tests AI-native solution	13%	38%
Switched core system	25%	11%
Conversion, test > switch	20%	30%

Strongest stickiness factors

Process embedding	67%	43%
Compliance requirements	33%	8%
System integrations	22%	36%

Top adoption barriers

Security concerns	22%	19%
Missing know-how	17%	15%
No suitable solutions	17%	9%

What this means for vendors

1 Product

Lead with workflow automation and document processing — the two use cases that directly answer this sector's compliance and process-embedding barriers.

2 Pricing

Bundle AI into existing contracts instead of charging a premium: budgets grow mainly by reallocation, and willingness to pay is hard-capped.

3 Go-to-market

Enter through the C-suite and use above-average vendor trust to position early, before compliance concerns stall the decision.

Legend

Explanation of metrics and calculations

Field	Metric	Source in report	Calculation rule / note
0 Header			
K1	AI delivering measurable value, % of respondents	Chapter I: Slide 8	Share calculated for the specific industry
K2	Share planning a higher software budget	Chapter II: Slide 13	Share calculated for the specific industry
K3	Average increase of the software budget over the next 2-3 years	Chapter II: Slide 13	Average calculated across all AI persona
1 Maturity & position			
A1	Persona mix: Observer / Experimenter / Early Adopter	Basics: Slide 4	Share of AI persona within the specific industry (AI personas based on current AI adoption and self-assessed AI maturity)
A2	Level of adoption: No use / testing / measurable value	Chapter I: Slide 8	Multiple answers are consolidated into these three categories (see slide to understand categorisation)
2 Demand			
B1	Cited AI benefits by decision-maker: efficiency / decision quality / transformation	Chapter III: Slide 18	Share of top-3 mentions, consolidation of answer options into categories (see slide to understand categorisation)
B2	Top 3 use cases: use today > planned future demand	Chapter IV: Slide 21	Factor calculated by dividing planned future demand by use today of the specific use case
B3	Quick win – largest gap of use case: Observer today vs. Early Adopter today	Chapter IV: Slide 22	Observer use today divided by Early Adopter use today of a specific use case to show the AI adoption near-term journey
B4	Mid-to-long term win – largest gap of use case: Early Adopters today vs. Early Adopters future	Chapter IV: Slide 22	Sum of current and planned use divided by current use – identifying the use case with the highest adoption trajectory
3 Budget & pricing			
C1	Share planning a higher budget + average increase	Chapter II: Slide 13	Share calculated for the specific industry
C2	Funding: additional budget / reallocation - of which personnel	Chapter II: Slide 14	Additional + reallocation sum to 100%; personnel share is of the reallocated part
C3	Price premium up to 25% / above 25% of value created	Chapter II: Slide 15	Multiple answers are consolidated into these categories (see slide to understand categorisation)
4 Route to market			
D1	AI initiator: C-suite / software vendors / IT	Chapter III: Slide 16	Share naming each role as the initiator (multiple answers)
D2	Software vendors as top advisor to decision-makers	Chapter III: Slide 17	Share of decision-makers naming software vendors as their single most trusted external advisor (top-1 answer)
D3	AI source, expected adoption: existing vendor / standalone / in-house / AI-native	Chapter I: Slide 12	Sum of uses today, plans to, and would consider; defines the addressable base; aggregation of answers into categorisation
5 Retention & risk			
E1	Switching funnel: test / replace / conversion	Chapter I: Slide 10	Conversion calculated by dividing % respondents of switching core system by % respondents testing AI-native solutions
E2	Top 3 switching barriers (stickiness)	Chapter I: Slide 11	Share of top-3 mentions
E3	Top 3 adoption barriers	Chapter III: Slide 19	Share of top-3 mentions