

AI is transforming everything from the user experience to how work itself is done.  
Enable your future workforce with AI PCs.

## Power the Future with an AI-Enabled Workforce

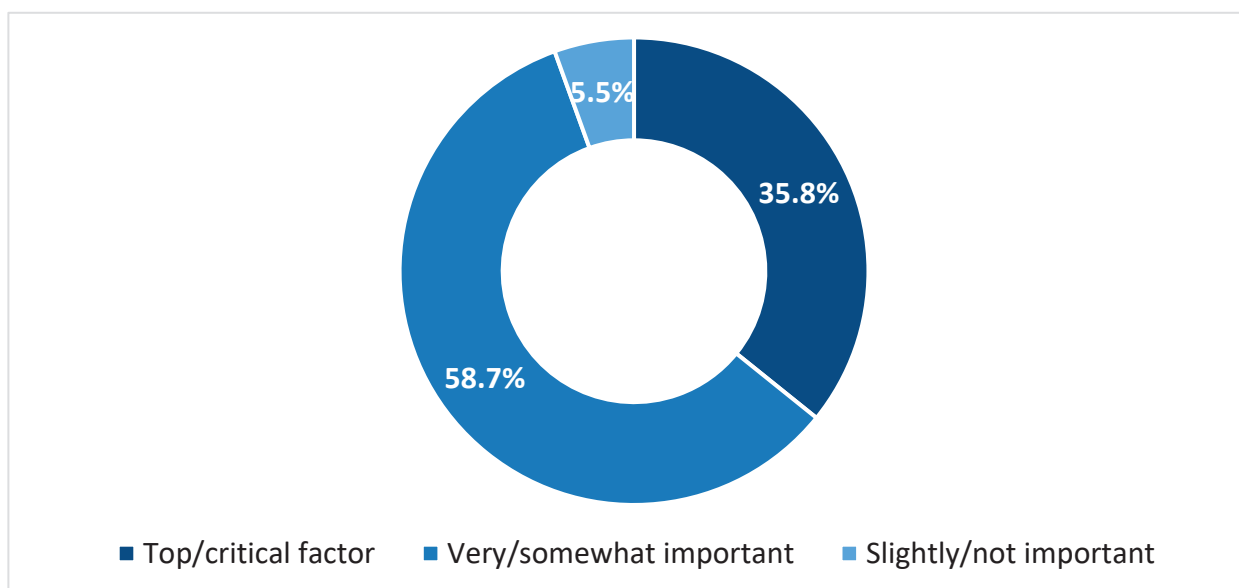
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Written by: Linn Huang, Research Vice President, Devices and Displays

### AI PC purchasing criteria

FIGURE 1: *Importance of AI capabilities in PCs*

Q How important will AI capabilities be when selecting your next fleet of PCs?



n = 220 for U.S. ITDMs

Source: IDC's U.S. Commercial PCD Survey, September 2025

## Introduction

The artificial intelligence (AI) age is upon us, and its arrival marks a new era for businesses and the workforce. Companies are accelerating their AI investments as they move from experimentation to broad deployment, with far-ranging goals that include improving productivity, speeding innovation, and carving fresh competitive moats. At the end-user level, AI promises to automate processes that currently require significant levels of human attention. This transformation will reshape both system workloads and human job descriptions. To accomplish this, AI will need to be seamless across cloud, data center, edge, and client devices.

The client side of this equation is covered by new AI PCs, defined as PCs with integrated neural processing units (NPUs) that run local AI workloads as efficiently as possible. Software developers are working with the purveyors of these processors to support NPUs more widely. OS vendors are baking AI into existing applications and creating new experiences on an ongoing basis, while businesses experiment with artificial intelligence and map out the problems it can best help solve. At every level, companies and their employees are exploring and evaluating AI and its long-term potential.

In IDC's 2025 *U.S. Commercial PCD Survey*, fielded in September, respondents were queried about their company's overall AI usage, as well as planned AI PC deployments. When asked what software will specifically benefit from AI PCs, the majority chose productivity software (66%), document creation software (51%), and communications software (49%).

These results indicate IT leaders see broad benefits in deploying AI PCs. AI will enable deeper levels of data analysis, help users brainstorm and create higher-quality content faster, and improve remote communications and collaboration. Two-thirds of IT leaders say AI capabilities will be very important or higher when purchasing their next PCs (refer to Figure 1). Device selection criteria often varied across our survey. 24% of respondents say a system's software catalog is most important. 22% identified latency. Another 16% say TOPS (throughput), with TOPS being the most popular standardized metric used in the industry today.

When it comes to CPUs with integrated NPUs, AMD has been a game changer. Ryzen PRO 8000G desktop APUs were the first x86 processors to launch with an integrated NPU in January of 2023, and Ryzen PRO 7000 Series did the same for notebooks. Ryzen AI PRO 300 processors launched in mid-2024 and were the first to feature a 50+ TOPS NPU. Today, AMD packs a wide portfolio of AI-enabling silicon that can meet your workforce's needs. Road warriors might enjoy thin-and-light notebooks powered by Ryzen AI 400 Series processors. Power users could benefit from systems with the performance level of Ryzen AI Max processors. For your AI developers, consider workstations powered by AMD Ryzen Threadripper PRO. Simply stated, AMD knows AI.

## Definitions

IDC defines AI PCs as PCs equipped with a neural processing unit, and further segments them based on NPU performance:

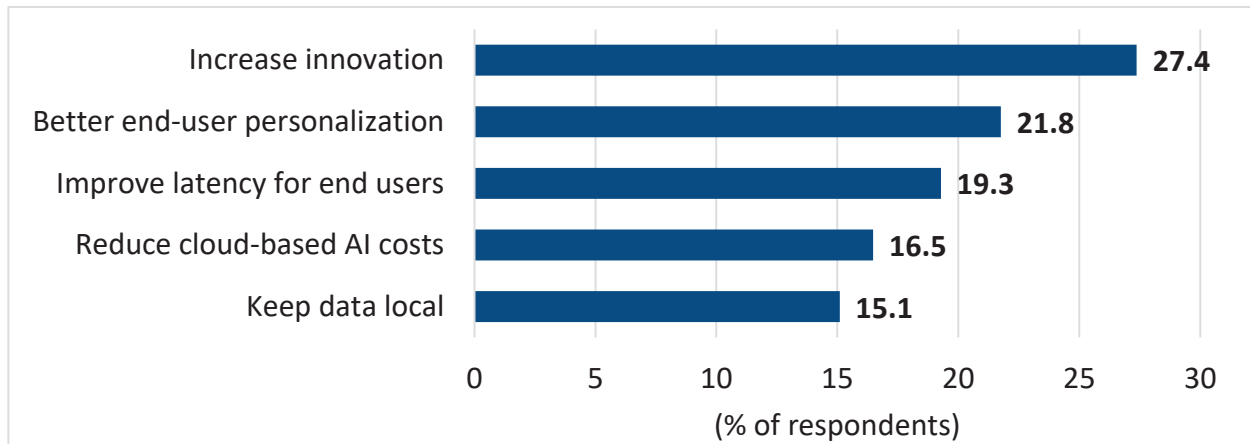
- » GenAI PCs offer 40+ TOPS of NPU performance.
- » Basic AI PCs offer <40 TOPS of NPU performance.
- » Non-AI PCs don't feature any NPUs.

## Benefits

Organizations and workers expect AI PCs to greatly impact their workloads and compute experiences. Per our survey, 27% say increased innovation will be the biggest benefit for them, while 22% expect better user personalization, and 19% identified improved latency as the largest likely improvement (see Figure 2).

FIGURE 2: **Expected organizational benefits of AI PCs**

**Q Which benefit of AI PCs resonates with your organization the most?**

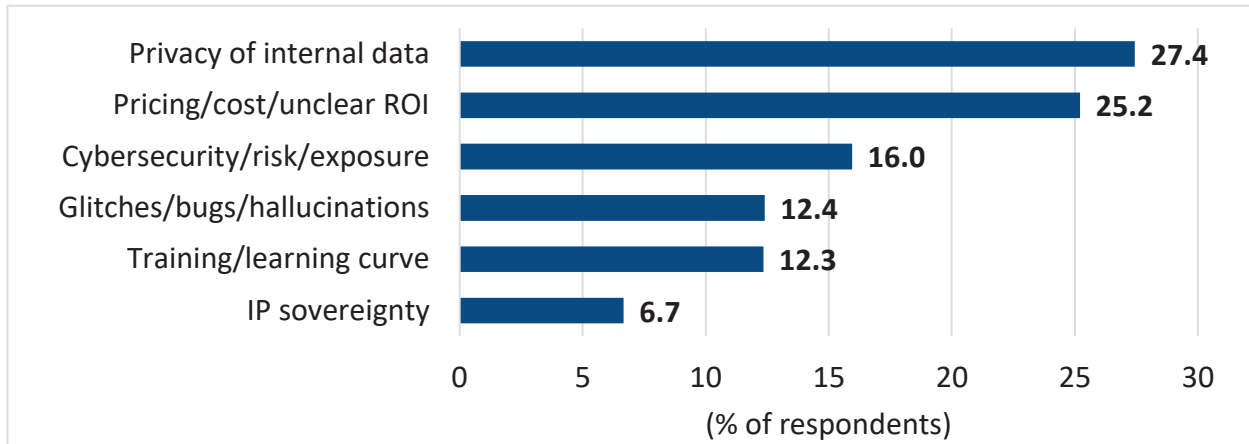


*n = 220 for U.S. ITDMs*

*Source: IDC's U.S. Commercial PCD Survey, September 2025*

As with any new and ramping technology, IT leaders have concerns about deploying AI (see Figure 3). 27% say privacy of internal data is the most pressing concern. Proprietary data is increasingly recognized as a competitive advantage in AI contexts, and protecting it is a top priority. Running AI locally lets users leverage AI assistance without exposing the company to cloud insecurities.

Another 25% say increased costs and unclear ROI are their largest concerns for AI PCs, while 16% say maintaining cybersecurity in the era of AI worries them. For those that share in cybersecurity concerns, rest assured that software vendors (both at the OS and application levels) are working with silicon providers and PC OEMs to accelerate AI-enabled security solutions and services.

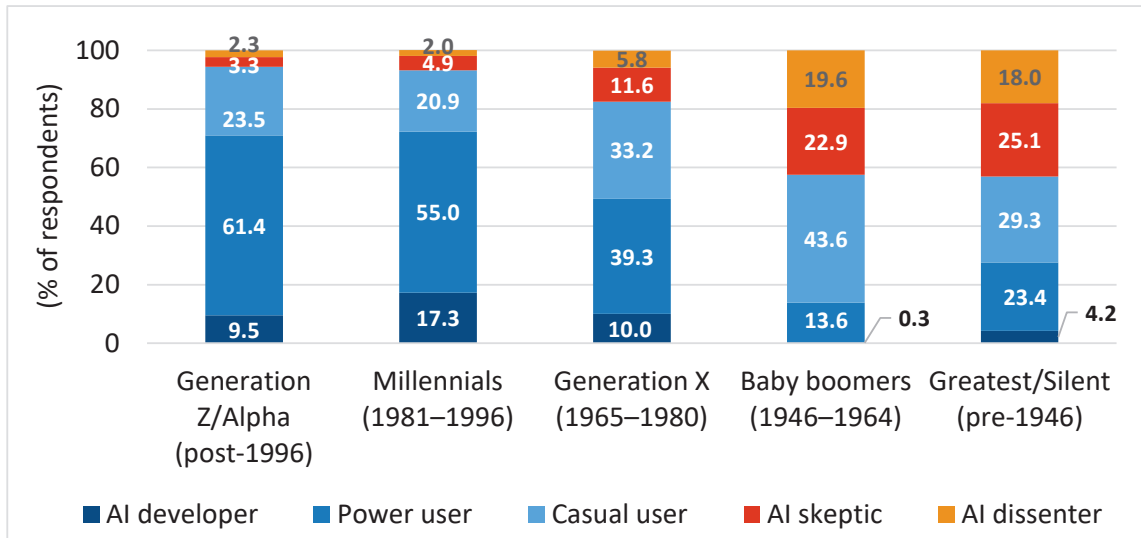
FIGURE 3: **AI PC concerns****Q What concerns you the most about AI PCs for your organization?**

*n* = 220 for U.S. ITDMs

Source: IDC's U.S. Commercial PCD Survey, September 2025

## Trends

At its heart, the ensuing AI era isn't just a technology or process transformation; it's a demographic transition as well. In November 2025, IDC fielded an end-user survey to 1,863 U.S. respondents about their home and work computing habits and needs. In total, 9% were AI developers, while another 40% regularly used AI and could be considered power users. Cutting this data across age or generation brings the aforementioned demographic shift into clear view as younger users tend to be more comfortable using AI to get work done. More than 70% of millennials or younger consider themselves either AI power users or developers (see Figure 4).

FIGURE 4: *AI classification by generation*

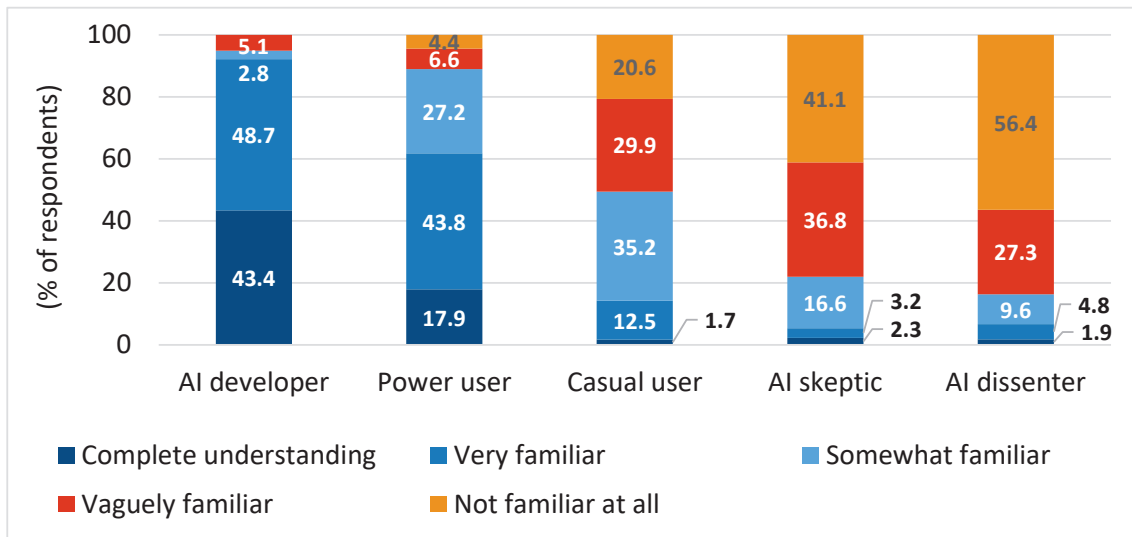
*n* = 1,863 for U.S. users

Source: IDC's U.S. Consumer PCD Survey, November 2025

These power users and developers expect AI capabilities in their devices and are following developments of the AI PC category closely. The overwhelming majority (92%) of AI developers were either very familiar with or had a complete understanding of AI PCs. For power users, this corresponding level of awareness still held the majority (62%). For casual users and the rest, awareness of AI PCs fell off a cliff (see Figure 5).

FIGURE 5: *AI PC awareness by AI classification*

#### Q How familiar are you with the concept of AI PCs?

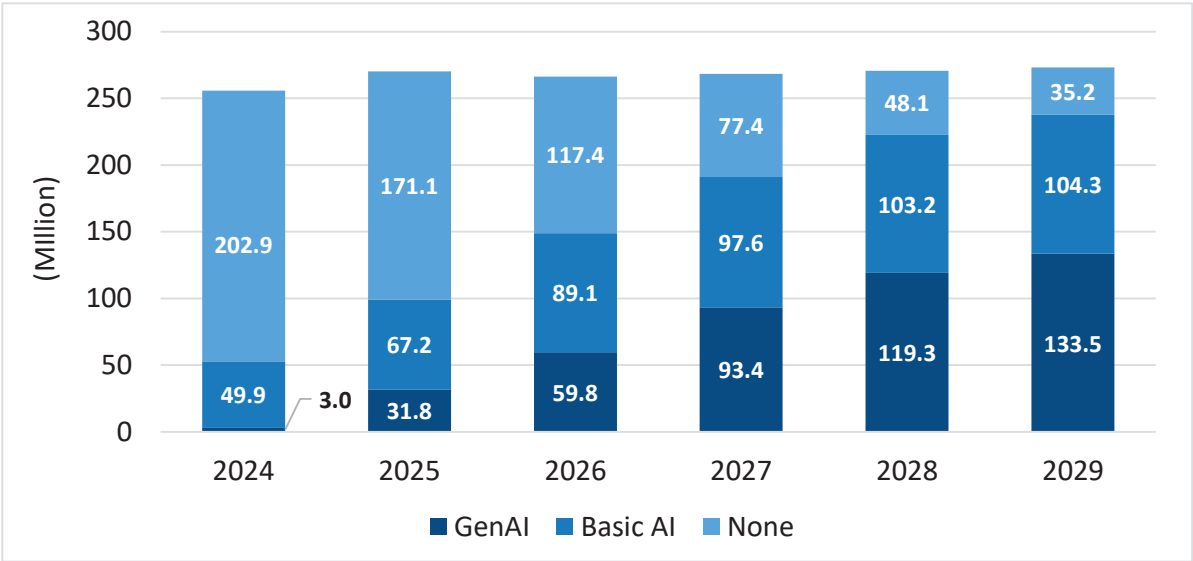


*n* = 1,863 for U.S. users

Source: IDC's U.S. Consumer PCD Survey, November 2025

Given the transformative effects of AI PCs, the industry's push to accelerate AI innovation, and seismic demographic shifts in AI users, we forecast the category to transition to ubiquity. We expect greater than 90% of all PCs shipped in 2029 to feature an NPU (see Figure 6).

FIGURE 6: AI PC forecast



Source: IDC's Quarterly Personal Computing Devices Tracker, November 2025

Conclusion

The incoming era of AI transformation is both a technological and a demographic shift. Younger workers are more engaged with and have higher expectations for AI technologies. As this demographic shift accelerates, your future workforce will have higher expectations for their organization's AI tools, capabilities, and strategies.

At the organizational level, IT managers anticipate AI having a strong impact on their users. They expect AI to transform the user experience when it comes to productivity, document, and communications software. This, in turn, should help them provide better, more personalized worker experiences as well as innovate faster.

Conversely, artificial intelligence is likely to impact companies as significantly as the internet did a generation ago. Get ahead of the curve and your competition by equipping your workforce with AI PCs today.

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## About the analyst



### ***Linn Huang, Research Vice President, Devices and Displays***

Linn Huang tracks market trends and industry developments that impact the worldwide and U.S. markets for PCs, thin clients, and monitors. He participates in cross-research streams that cover all device categories.

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Survey data from IDC's 2025 US Commercial PCD Survey suggests that AI PCs and their unique capabilities are a fundamental pillar of IT deployments through 2026 and beyond\*. Learn how AMD Ryzen AI PRO processors are designed to support business outcomes by enabling efficient, scalable on-device AI within an open and flexible [enterprise PC ecosystem](#).

Source: IDC's 2025 U.S. Commercial PCD Survey — AI PC Results, October 2025, US53871125



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