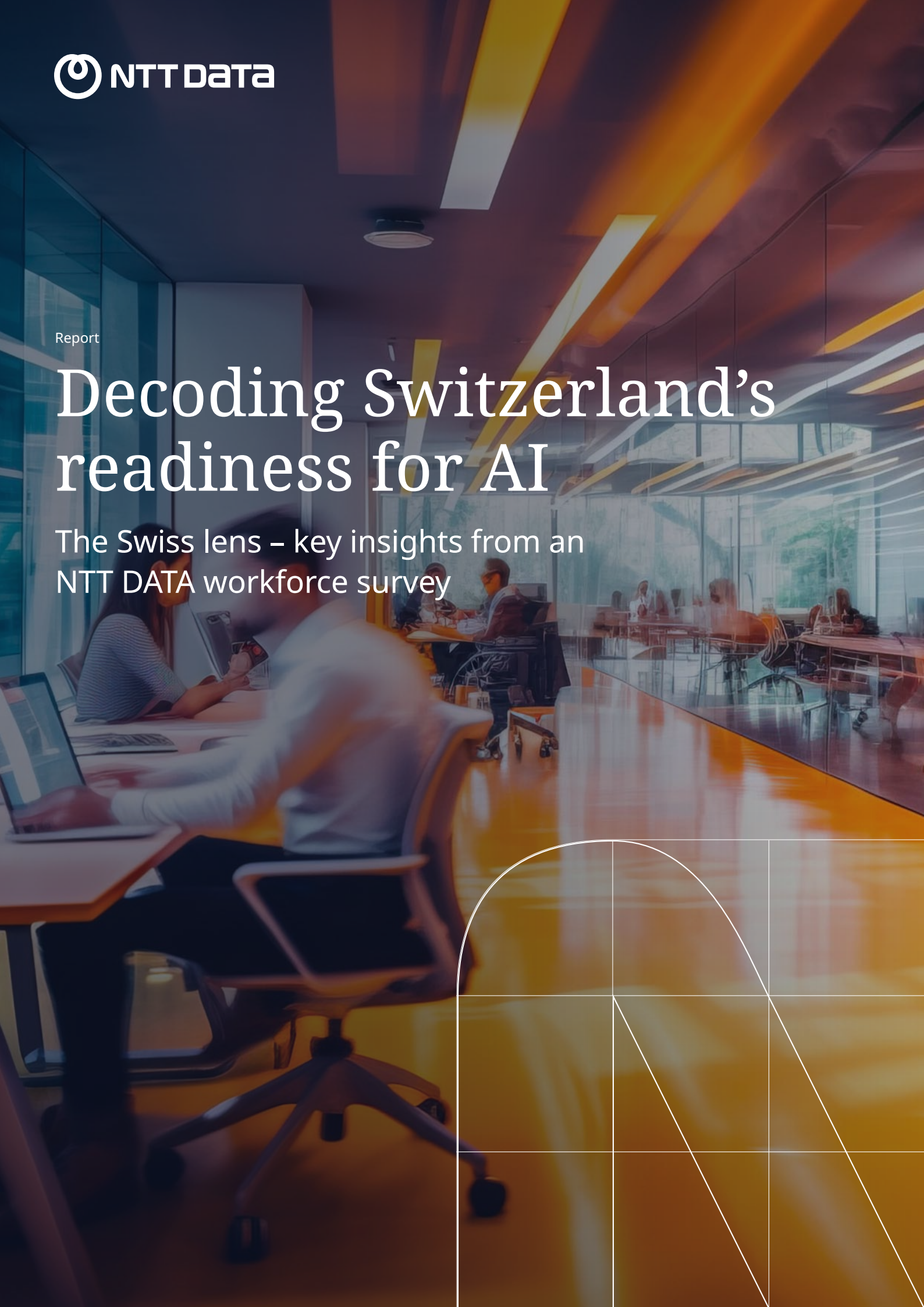


Report

# Decoding Switzerland's readiness for AI

The Swiss lens – key insights from an NTT DATA workforce survey



# Content

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**3 Introduction**

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**3 Significant potential, minimal risk**

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**4 Adoption will grow strongly**

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**4 Workforce feels unprepared**

---

**4 Business functions lead AI adoption from the ground up**

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**5 Exemplary uses cases**

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**6 Playtime is over for GenAI**

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**6 Aligning AI adoption with workforce preparedness for long term success**

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**7 About the research**

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**7 About the authors**

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## Introduction

Imagine a nation standing at the crossroads of tradition and transformation, where a centuries-old legacy of innovation meets the relentless momentum of technological revolution. Switzerland, renowned for its precision, ingeniousness, and global leadership in patents, finds itself uniquely poised to lead the charge into the era of artificial intelligence (AI). This is not just a story of algorithms and automation – this is about the profound reshaping of industries and the human potential to redefine the future.

From the towering peaks of banking and pharmaceuticals to the intricate valleys of manufacturing and retail, Swiss industries are already harnessing AI to drive unimaginable efficiency and creativity. Yet, a fascinating dichotomy emerges: while the workforce expresses an undeniable willingness to embrace this revolution, there exists a critical gap in readiness – one that begs for urgent attention.

This whitepaper unveils the results of an insightful survey by NTT DATA Switzerland, offering an unflinching look at how a nation celebrated for its innovation must now rise to meet the challenges of its boldest technological frontier. Dive deeper to uncover how Switzerland's industries, its people, and its policies can converge to shape a future powered by AI – and why this might just be a very defining moment.

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**75%** of the Swiss workforce recognizes a strong or certain potential for leveraging AI in their workplaces.

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## Significant potential, minimal risk

The survey reveals that a significant majority – 75% – of the Swiss workforce recognizes a strong or certain potential for leveraging AI in their workplaces. This finding underscores not just openness but a genuine eagerness to integrate AI into daily workflows, signaling a cultural readiness for transformation. However, the 25% of respondents who see little to no potential may represent industries or roles where AI's applications are less understood or where its transformative impact has yet to be demonstrated effectively.

Younger individuals (18-29) perceive greater potential in AI, with 45% reporting “great potential,” compared to just 14% of those aged 50-65. This disparity highlights a generational divide, possibly reflecting the younger generation's greater exposure to digital tools and a stronger belief in technology as a driver of change.

Perceptions of AI opportunities are generally consistent across income levels; however, higher-income individuals (earning over 200k CHF annually) are more likely to feel prepared for AI integration in the workplace. Fifty-three percent of high-income earners feel prepared, compared to only 27% of those earning less than 60k CHF annually. This gap could point to unequal access to resources, training, or roles with direct exposure to cutting-edge AI applications, where higher-income professionals may also benefit from organizational support for skill-building initiatives. Our perspective is that this is likely due to higher income brackets being more involved in setting strategic direction and driving financial improvements within organizations, roles where AI tools are actively being adopted to gain competitive advantage.

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**69%** indicated that they see no risk or only minimal risk.

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When asked about the extent to which they perceive risks associated with AI, an impressive 69% indicated that they see no risk or only minimal risk – primarily for areas of activity outside their own workplace. This suggests a prevailing confidence in Switzerland's ability to manage AI responsibly within a professional context. When contrasted with the often fear-driven conversations surrounding AI in everyday settings, such as on the streets or at the coffee table, this survey finding highlights a nuanced and optimistic view. It strongly reinforces Switzerland's exceptional support for harnessing emerging technologies to maximize their benefits, coupled with a clear trust in regulatory frameworks and organizational preparedness to mitigate risks.

These perspectives are largely shared by both men and women.

## Adoption will grow strongly

When asked about the current and future use of AI within their companies or public institutions, respondents expressed a highly positive outlook, anticipating significant AI adoption in the coming years. Starting from a baseline of 28% this year, where AI is already being utilized to some extent, this figure is expected to rise to 62% by next year and exceed 70% within the next five years. This sharp growth trajectory underscores not only a widespread belief in AI's transformative potential but also a recognition of its inevitability in driving competitive advantages and innovation. Just above one-quarter believe that AI will have a limited or negligible role by 2029, possibly reflecting either skepticism about AI's applicability in niche sectors or concerns over implementation challenges, such as costs or ethical considerations.

Meanwhile, below two-thirds of respondents indicate that they are already using AI regularly in their daily lives, reflecting a rapid normalization of AI in everyday technology, from voice assistants to recommendation algorithms. Additionally, 43% have experimented with AI for the first time, signaling that curiosity and accessibility are lowering barriers to entry. Notably, only 10% expressed no interest in using AI, which suggests that reluctance may stem more from a lack of familiarity or trust than outright resistance to the technology.

However, 17% of respondents reported falling victim to an AI-driven scam, highlighting a concerning dark side of AI adoption. With the increasing sophistication of AI-based impersonations in video and audio – deepfakes and phishing scams in particular – this poses a growing challenge for individuals, corporations, policymakers, and public institutions to effectively identify and protect against AI-related fraud. These findings stress the urgent need for comprehensive education, stronger cybersecurity measures, and regulatory frameworks to safeguard trust in AI as its adoption becomes pervasive.

## Workforce feels unprepared

The data above clearly highlights a strong openness and belief in the potential of AI. However, a notable concern is that most of the workforce feels inadequately informed by their employers and, moreover, unprepared in terms of training or coaching to effectively integrate AI into their roles and daily business operations. This lack of preparedness could indicate a misalignment between organizational ambitions to adopt AI and the resources or support provided to employees, potentially creating a gap in effective implementation.

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# Only 13%

## of respondents feel well-prepared.

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Only 13% of respondents feel well-prepared, having received specific training for their jobs, a figure that underscores the urgency for targeted education programs to close the skills gap.

Additionally, only 29% have been provided with relevant information regarding their company's AI strategy and plans for its implementation. This suggests that many companies may either lack a coherent AI communication strategy or underestimate the importance of transparency in fostering employee confidence and engagement with the technology. Interestingly, over 37% feel well-prepared and informed by their respective departments, which first sounds like a contradiction but makes sense when taking a closer look: it points to variability in how departments, rather than entire organizations, are tackling AI readiness. This could reflect siloed initiatives where some teams or units are leading the way while others lag behind, emphasizing the need for a more unified and comprehensive organizational approach to AI integration.

## Business functions lead AI adoption from the ground up

The findings indicate that AI implementation is still predominantly in the experimental phase within individual departments, where employees feel more confident engaging with AI in their immediate work environment than in alignment with broader company strategies. This observation aligns with insights from our global report and discussions with clients across industries: while 83% of organizations have a well-defined AI strategy, only 51% acknowledge that it is not fully aligned with their overarching business objectives.

Typically, individual departments are tasked with translating high-level strategies into actionable use cases that drive meaningful business process automation. However, with the emergence of Generative AI (GenAI), a bottom-up approach appears to be gaining traction. While the democratization of technology fosters accessibility and innovation, it also introduces risks, such as the proliferation of uncoordinated, siloed solutions that may deliver short-term value but fail to meet long-term ROI expectations. To address this, executives must prioritize aligning corporate and GenAI strategies, ensuring coherence and maximizing the technology's transformative potential across the organization.



### Human Resources (HR) – Recruitment and Talent Acquisition:

AI tools streamline hiring in Switzerland by auto-mating candidate screening and matching resumes to job descriptions, addressing talent shortages in tech and healthcare. Multilingual AI chatbots support interviews, reflecting the country's linguistic diversity while enhancing efficiency.



### Finance & Controlling – Fraud Detection and Risk Management:

Swiss financial institutions use AI to analyze transaction patterns and detect fraud in real-time. This helps maintain trust in Switzerland's tightly regulated banking sector. AI risk models also support decision-making in managing currency fluctuations and international compliance.



### Research & Development (R&D) – Drug Discovery and Product Innovation:

Pharmaceutical leaders leverage AI for faster drug discovery, analyzing genomic data to identify viable compounds. This enhances efficiency and reinforces Switzerland's global leadership in biotech innovation.



### Supply Chain – Predictive Analytics for Demand Forecasting:

Swiss manufacturers use AI to predict demand for seasonal goods like winter sports equipment and luxury watches. These tools optimize inventory and support export-driven industries by enhancing global supply chain networks.



### Call Center – Automated Customer Support with AI Chatbots:

AI chatbots in Swiss call centers handle multilingual inquiries in Swiss-German, German, French, Italian, and English. They improve efficiency in sectors like insurances and banking by reducing wait times while maintaining high service quality.



### Customer Service – Personalized Customer Interaction:

Swiss retailers use AI to deliver tailored recommendations, especially in luxury goods and tourism. AI virtual assistants provide 24/7 support to international clients, enhancing customer satisfaction and loyalty.



### Sales – Lead Scoring and Sales Forecasting:

AI supports Swiss sales teams by prioritizing leads and predicting outcomes based on CRM data. This is crucial for export-focused businesses, enabling them to adapt strategies to global market trends efficiently.

## Playtime is over for GenAI

However, it is evident that the experimental phase for Generative AI is coming to an end, as organizations transition from pilot projects to large-scale strategic investments designed to drive long-term performance improvements. This shift reflects a broader trend where businesses, having tested the waters with small-scale AI initiatives, are now recognizing the transformative potential of Generative AI in driving substantial operational efficiencies, cost savings, and innovation. The initial skepticism and cautious experimentation that characterized the early days of AI adoption are being replaced by a more confident, results-driven approach as companies see tangible outcomes from their AI deployments.

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**97%** anticipate a significant impact on productivity improvements.

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According to our Global GenAI Report, 97% anticipate a significant impact on productivity improvements from Generative AI technology, underlining the growing recognition of its potential to revolutionize various business functions. For example, AI's ability to automate complex processes, improve decision-making through predictive analytics, and enhance customer experiences through personalized interactions is poised to drive productivity gains across industries. In particular, sectors like finance, healthcare, and manufacturing are already reaping the benefits of AI-driven process automation, which frees up human resources for higher-value tasks and streamlines operations.

Beyond mere productivity, executives also see AI as a key enabler of innovation, allowing companies to unlock new business models, products, and services. As AI capabilities continue to evolve, businesses are increasingly investing in AI not just for incremental improvements but for large-scale, transformative changes that could redefine their competitive landscape. Furthermore, organizations are aligning AI adoption with broader digital transformation strategies, ensuring that their investments are integrated into long-term goals for growth and sustainability. This widespread adoption and commitment to AI represents a shift from seeing AI as a disruptive force to viewing it as a critical tool for sustained business success in the modern, data-driven economy.

## Aligning AI adoption with workforce preparedness for long term success

In parallel, the findings from our workforce survey in Switzerland further highlight the growing optimism and opportunity surrounding AI, although there are notable gaps in preparation and awareness. While 75% of the surveyed Swiss workforce recognizes the potential of AI in their workplace, with a significant number expressing confidence in its ability to enhance productivity, many employees feel inadequately prepared for its integration. Only 13% reported receiving specific AI training, and only 29% were provided with relevant information about their company's AI strategy. This perspective from Swiss employees aligns with the views of executives: according to our global research, two-thirds of decision-makers reported that their employees currently lack the necessary skills to effectively work with Generative AI (GenAI). This gap underscores the critical need for targeted training and development programs to ensure that the workforce is equipped to leverage the full potential of GenAI technologies. These figures point to a disconnect between the rapid adoption of AI at the organizational level and the lack of workforce readiness.

This highlights the need for businesses to invest not only in AI infrastructure but also in workforce development, ensuring that employees are equipped with the skills and knowledge required to navigate the evolving technological landscape. As organizations move forward with AI adoption, they must balance technological innovation with the necessary support and resources for employees, fostering a culture of continuous learning and adaptation.

The survey of Swiss employees underscores that the successful integration of AI goes beyond the technology itself – it hinges on how effectively employees are supported in adapting to these advancements. The findings highlight the importance of comprehensive communication and training initiatives in facilitating this transition. This survey complements NTT DATA's global survey of executives, reinforcing that bridging the gap between organizational AI strategies and individual readiness is crucial for successful AI adoption. Tailored support and clear communication will be key in aligning employees' capabilities with evolving technological demands.

## About the research

The "Decoding Switzerland's Readiness for AI" report is based on independently sourced primary research data, gathered from a representative sample of over 300 employed individuals across various industries in Switzerland. Respondents, aged between 18 and 65, reflect a balanced demographic distribution. The sample's representativeness was tested and confirmed through statistical methods, including chi-square goodness-of-fit tests, demonstrating alignment with the Swiss workforce demographics. The survey was conducted through an online questionnaire during September 2024, with data integrity, validation, analysis, and interpretation carried out by NTT DATA's in-house experts. The findings are presented with a confidence level of 95% and a margin of error of approximately  $\pm 5\%$ .

## About the authors

**Christian Seider** serves as the General Manager for NTT DATA in Switzerland. A dynamic leader with a strong commitment to digital transformation, he is deeply convinced that digitalization is a powerful driver of sustainable growth. His leadership is grounded in a holistic approach that emphasizes the importance of balancing technological advancement with a responsibility to both people and the planet.

**Nathan Quadrio** is a Cloud, Data, and AI Solutions Architect at NTT DATA. With a background in applied mathematics and a passion for causal inference, he believes that uncovering insights through data is key to driving transformative business solutions. His work emphasizes a holistic approach, focusing on building scalable systems to empower organizations achieve their business goals.

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## About NTT DATA

NTT DATA – part of NTT Group - is a trusted global innovator of business and IT solutions with its headquarters in Tokyo. We support our customers in their transformation through consulting, industry solutions, business process services, IT modernisation and managed services. With NTT DATA, customers and society in general can step confidently into the digital future. We are committed to the long-term success of our customers and combine a global presence with local customer support in over 50 countries.

For more information, visit us at [ch.nttdata.com](https://ch.nttdata.com)

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