

On the current state of Generative AI adoption in German IT Industry

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Abstract. This paper presents the results of a survey investigating the current adoption of Generative Artificial Intelligence (GenAI) in the German IT industry. Through a quantitative online study involving 174 IT professionals across various companies, we examine the actual added value of GenAI technologies in professional contexts, focusing on measurable impacts on employee productivity. The findings reveal significant variations in adoption rates between organizations, with international consulting firms achieving 100% utilization compared to approximately 50% in national service providers. Research and knowledge dissemination emerge as primary use cases, while data security represents the most prominent challenge. Additionally, we investigate the need for local Large Language Models (LLMs) in light of growing data protection concerns and political uncertainty, with a notable percentage of respondents indicating awareness of compliance requirements. The results provide researchers as well as companies with an empirical basis to evaluate their own development status within the context of industry trends and derive strategic recommendations for action. Our findings contribute to an objective discussion about GenAI adoption in the German IT landscape and help to make informed decisions about AI strategies while providing comparative orientation across different company sizes and fields of activity.

Keywords: GenAI · LLM · German IT industry · productivity · survey · adoption · business value

1 Introduction

The rapid development of Generative Artificial Intelligence (GenAI), which is artificial intelligence, able to generate content such as text, images, videos and more based on a user prompt, in 2023 has led to a broad public discussion about its potential and risks. In particular, in the IT industry, which traditionally plays a pioneering role in adopting new technologies, the question of the actual added value of this development arises. Although some voices dismiss GenAI as a short-lived trend, others see it as a fundamental transformation of the working world.

This study was initiated to obtain a differentiated picture of the current use of GenAI in the IT industry. A central concern was to create an empirical basis for classifying one's own development status by surveying employees from

different companies. This comparative perspective enables organizations to evaluate their position in the context of industry development and derive strategic recommendations for action.

A particular focus of the investigation was on the extent to which the use of GenAI tools impacts employee productivity. By collecting self-assessed usage experiences and perceived effects, our aim was to verify whether the sometimes euphoric expectations of this technology align with personal reality. These findings are of high practical relevance for decisions about future investments in AI technologies.

Another central research question concerned the necessity of local Large Language Models (LLMs). Against the background of growing data protection concerns and specific compliance requirements, we examined whether the responses of those surveyed indicate a need for the implementation of company-owned AI infrastructures. This question is of strategic importance, as the decision between cloud-based and local solutions has far-reaching implications for resource allocation and technological autonomy.

Overall, this study aims to contribute concrete data to the factual discussion about GenAI and help companies make informed decisions for their AI strategy, as well as provide comparative orientation.

2 Theoretical Background

2.1 Definition and Types of Generative AI

Generative Artificial Intelligence (GenAI) refers to a class of AI technologies capable of creating novel content in response to user inputs. These systems leverage large-scale models trained on vast datasets to generate outputs that resemble human-created content across a variety of modalities. Contemporary GenAI systems can be broadly categorized based on the type of content they generate. Text-based models, such as OpenAI's GPT series or Meta's LLaMA, are widely used for knowledge acquisition, text generation, summarization, and translation tasks. Image generation models, like DALL·E or Stable Diffusion, create visual content from textual descriptions, enabling applications in design, marketing, and creative industries. Code-generating models, such as GitHub Copilot, assist developers by producing syntactically correct and contextually appropriate code snippets in various programming languages whereas agentic approaches can generate complete applications based on simple prompts. Furthermore, multimodal models such as Gemini or GPT-4 with vision integrate multiple input types, including text, images, and even audio, to perform complex cross-modal reasoning tasks. These diverse capabilities underline the technological breadth of GenAI and its growing relevance across domains.

2.2 Previous Studies on the Adoption of GenAI in Professional Contexts

The adoption of Generative Artificial Intelligence (GenAI) in professional contexts has been the subject of numerous international studies in recent years.

McKinsey’s latest report on the state of AI from 2024 shows that 65% of organizations worldwide are actively using GenAI tools, particularly in customer operations, software development, and marketing [5]. Another McKinsey study highlights the growing role of AI in enabling so-called “superagents” in the workplace, where AI augments employee productivity across domains [6]. However, both studies lack data specific to Germany, indicating a regional research gap.

The OECD’s 2023 survey among workers and employers emphasizes the uneven impact of AI across sectors and skill levels. While AI adoption has led to task automation and efficiency gains, the report also highlights increased demand for reskilling and the risk of polarization within the labor market [4]. Academic contributions support these findings: Raftopoulos and Hamari stress the importance of organizational trust, transparency, and governance in fostering successful AI implementation in the workplace [8]. Kumar and Henningsson identify uncertainty about responsibilities and strategic alignment as major barriers to effective AI integration [3].

In the IT sector, the Stack Overflow Developer Survey (2024) indicates that 76% of developers already use or plan to use GenAI tools, primarily for code generation, bug fixing, and documentation tasks [10]. The educational domain shows a similar trend: a survey conducted by Campus Technology reveals that 86% of students use GenAI tools in their studies, pointing to an early and widespread adoption among digital natives [1].

In the academic research environment, a 2025 article in *Nature* identifies dealing with GenAI as one of the top professional challenges for researchers [7]. This is echoed in a Wiley survey, where respondents express concern over rapidly changing norms in authorship and peer review processes [11].

While these studies offer valuable insights into GenAI adoption at a global scale, they lack a localized empirical basis for Germany. The present study addresses this gap by capturing GenAI usage behavior, perceived productivity effects, and infrastructure preferences among professionals of the German IT industry. In doing so, it provides a data-driven perspective that enables organizations to evaluate their development status and derive actionable strategies within a national context.

3 Methodology

The present study was designed as a quantitative online survey to systematically capture the current state of GenAI use in the IT industry. The methodological approach is described in detail below.

3.1 Research Design and Survey Instrument

The study is based on a standardized online questionnaire implemented using Microsoft Forms. The choice of an online questionnaire enabled efficient data collection while ensuring the anonymity of participants. The questionnaire was

deliberately designed to be compact, with an estimated completion time of 2-4 minutes, to achieve the highest possible response rate.

The content structure of the questionnaire was organized into three thematic blocks:

- A statistical section to capture basic personal and organizational characteristics
- A main section to investigate current GenAI usage
- A reflective and predictive section on personal competencies and development perspectives regarding GenAI

3.2 Sample Selection and Recruitment

The study population consisted of IT professionals from various companies in Germany. These included, in order of participating employees starting with the most numerous participation, a national energy market IT service provider, an international strategy consultancy, a large national IT consultancy, a global logistics company, a biotech startup, and other national companies. To cover the various aspects of the IT industry, a broad target group was defined, including technical and management-oriented roles. The focus was on development-related employees. The selection of the target group was not representative. In total, the survey had 174 participants.

3.3 Operationalization and Measurement Instruments

The developed questionnaire comprises a total of 12 questions designed to capture various dimensions of GenAI use and was given in German as well as English language. To collect contextual variables, the respondents' professional field of activity and the size of their company were collected first. The fields of activity were divided into seven specific categories. For company size, a four-level classification from small companies to corporations was chosen, based on the EU standard for small and medium enterprises [2].

Usage behavior was examined through several sequential questions. First, a dichotomous question was used to determine the basic use of AI tools (*Have you ever used AI-based tools in your professional work?*, Figure 1). Answering this question with *no* skips all but the last question of the questionnaire. If answered with *yes*, the questionnaire continued and first the specific purposes of use were determined through a multiple choice question with eight predefined options (*For which tasks do you mainly use GenAI tools?*, Figure 2). For the detailed analysis of tool usage, a differentiated matrix question was used (*Which GenAI tools do you actively use at work?*, Figure 3), in which the frequency of use of various GenAI tools could be rated on a five-point Likert scale from "daily" to "never" and "unknown". Additionally, the infrastructure (Figure 4 and licensing models used (Figure 5 as well as the awareness in terms of compliance and current regulations (Figure 6 were surveyed.

In the predictive area of competence and development, special emphasis was placed on the self-assessment of the respondents. Starting with the first question of block, a five-level competence scale consisting of metaphorical self-assessments was developed, which depicts different levels of GenAI expertise (*How would you assess your current proficiency in using GenAI?*, Figure 7). The given options as well as the corresponding proficiency mapping is given below.

- *I know the URL of ChatGPT* - Beginner
- *I understand what a prompt is* - Intermediate
- *I can't start without Chain of Thought prompts* - Advanced
- *I use my own fine-tuned models on my hardware* - Professional
- *I am currently training a new base model* - Professional

Due to sparse results both latter categories were merged into *Professional* category. Using the given metaphorical scale for skill self-assessment increases accessibility by employing relatable, behavior-based statements that avoid the status implications of technical terms like "beginner" or "expert." These concrete descriptions are contextually relevant to GenAI usage patterns, making them more meaningful than generic assessments, as the approach provides clear differentiation in an emerging field where standardized skill classifications haven't yet been established. Additionally this approach improves engagement and comprehension through relatable, informal phrasing.

The recording of perceived productivity effects was also done using a five-point Likert scale, ranging from significant improvement to negative effects *How do you assess the impact of AI tools on your productivity?*. Afterwards, current challenges in using GenAI were asked *What challenges or obstacles do you face when using GenAI tools?*. The third question block was rounded off by surveying about concrete planned steps within the next 12 months regarding GenAI *Are you planning to address any of the following topics in the next 12 months?*. Followed by a multiple choice list of answers containing of *Purchase software licenses for AI tools*, *AI training for you or your team*, *Development of own AI solutions*, *Deploy own AI hardware*, *No AI-related activities planned*. As mentioned above this last question was also given to participants that reportedly never used GenAI until the time being.

The chosen questions were designed to enable a differentiated recording of the various aspects on the one hand, but on the other hand to be easily understandable and quickly answerable for the participants without appearing monotonous. Free-text answers were omitted.

3.4 Implementation and Data Collection

The original survey period lasts from November 2024 to December 13, 2024, and was subsequently extended until the end of December 2024. Data collection was automated via the Microsoft Forms platform, ensuring standardized and error-minimized but at the same time very easily accessible and available data collection.

Participants were approached via a two-stage email campaign by their supervisor, people lead, or a colleague: An initial invitation contained an explanation of the study objectives, the importance of individual participation for the research, an assurance of anonymous data processing and the promise to make the results available to all participants afterwards. A reminder email was sent towards the end of the survey period, combined with an extension of the participation deadline by two weeks.

A response rate cannot be reliably stated, as the respective survey links were shared by contact persons at the participating companies in their respective hierarchies without sharing recipient lists. From verbal feedback of the contact persons we assume the response rate between one third and half of the recipients.

After the survey was conducted in the first company, minor adjustments were made to the questionnaire. As a result, two slightly different versions of the survey were used; however, their content was sufficiently aligned to allow for consistent consolidation of the collected data.

4 Results

The individual survey results were consolidated and visualized. Pie charts were used to represent questions allowing only a single response, whereas bar charts were employed for questions permitting multiple answers.

4.1 Current Level of GenAI Usage

When looking at the overall adoption rate of GenAI 76.5% of the participants have already used this new technology in their professional work. Linking this to the different company sizes as well as to the professional occupation of the participants reveals an uneven distribution which is further discussed in section 5.1

Have you ever used AI-based tools in the context of your professional activities?

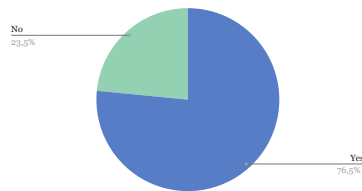


Fig. 1. GenAI Usage

For which tasks do you primarily use generative AI tools?

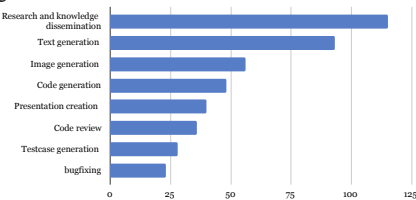


Fig. 2. For which tasks GenAI was used

4.2 Areas of Application and Tools Used

The application area mentioned most often when using GenAI is *Research and Knowledge Dissemination* followed by *Text Generation*, with a little distance

Image Generation follows at third position. On position five *Presentation Creation* can be found. Although the survey was conducted among IT-professionals, the usage of GenAI for *Code Generation*, *Code Review*, *Testcase Generation* and *Bugfixing*, remains comparable low. Table 3 shows how frequently participants use various GenAI tools. ChatGPT stands out as by far the most widely known and used tool, with no participants indicating they had never heard of it. This does not necessarily reflect superior functionality but may rather result from broader visibility and accessibility. Other tools such as Microsoft Copilot, Gemini, and Claude are far less known or used. Image generation tools (e.g., DALL·E, Midjourney) were grouped into one category due to the smaller number of mentions. While daily use remains limited, a notable share of participants has at least experimented with them, suggesting a high level of interest despite lower regular integration into workflows.

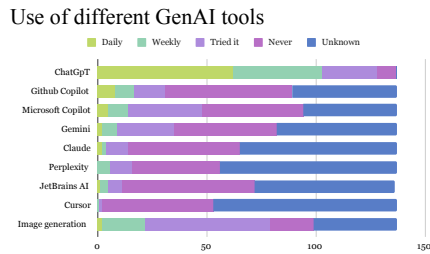


Fig. 3. Which GenAI Tools were used

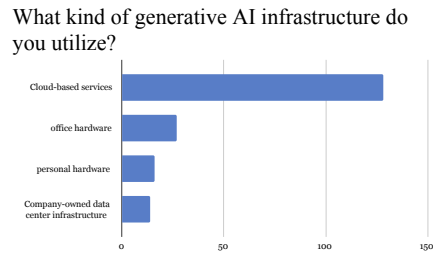


Fig. 4. Used Infrastructure

When asked about the infrastructure used for GenAI, as Figure 4 shows, the majority, 128 participants, reported relying on cloud-based services. Significantly fewer respondents indicated using office hardware (27), personal hardware (16), or company-owned data center infrastructure (14). This highlights a clear preference for externally hosted solutions, likely due to their scalability, accessibility, and low entry barriers.

Regarding the licensing of the tools used, 87 participants reported using company-provided licenses, 58 participants utilized private free accounts and 27 participants paid personally for a private account. A comparison between two companies—one that provides licenses and one that does not—revealed a substantial difference in the use of private accounts. Participants without access to a company license were four times more likely to personally pay for a private account compared to those who had access to a company-provided license.

4.3 Challenges and Benefits

A considerable share of respondents indicated an awareness of data protection and compliance issues in relation to GenAI use. While 112 participants are familiar with their organization’s internal policies, 85 also reported knowledge of the broader legal and regulatory environment (see Figure 6). Only 15 respondents stated that they use GenAI tools without paying particular attention to

such regulations, suggesting that regulatory considerations play a relevant role for most users.

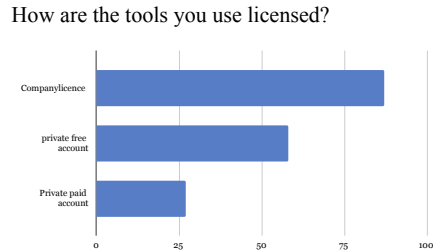


Fig. 5. Licensing of used tools

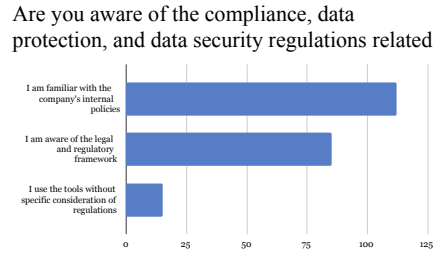


Fig. 6. Awareness of Compliance, Data Protection and Data Security Regulations

Participants were also asked to evaluate their current level of proficiency with generative AI tools. The majority with 85 participants consider themselves to be at an intermediate level, followed by 36 describing their skills as advanced. Only a few assess themselves as either beginners (8) or professionals (8). This distribution suggests a broad base of confident users, while highly specialized expertise remains limited. (Figure 7)

4.4 Differences in GenAI Adoption

The data reveal a stark contrast in Generative AI adoption rates between organizations. Within the international consulting company, all participants report utilizing at least one form of GenAI in their professional work. In contrast, only approximately 50% of participants from the national service provider reported a similar adoption.

4.5 Perceived Benefits and Risks

When evaluating the effect of GenAI tools on productivity, 70 respondents reported a slight improvement and 47 reported a significant improvement. Only a small number, 16 participants, perceived no effect, while 2 participants experienced negative effects, and 3 stated that no evaluation was possible. Despite the majority of participants rating their own proficiency as intermediate, the perceived productivity gains are notably positive, indicating strong potential for GenAI tools to enhance efficiency even among users without advanced expertise. (Figure 8)

Among the challenges associated with the use of GenAI tools, Data security was identified as the most frequent challenge, mentioned by 87 respondents, highlighting persistent concerns regarding confidentiality and compliance. Expenses were cited by 38 respondents, technical integration by 37, and team acceptance by 27, emphasizing the influence of organizational and infrastructural factors. In contrast, difficulties in usage were reported by 23 respondents, a lack of viable application scenarios by 16, and reduced productivity by 8, suggesting that

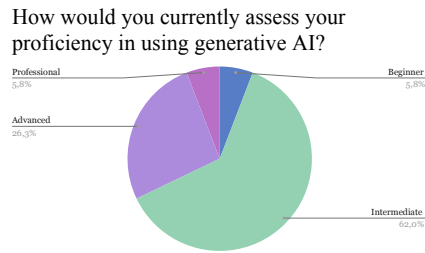


Fig. 7. Self-Assessed Proficiency

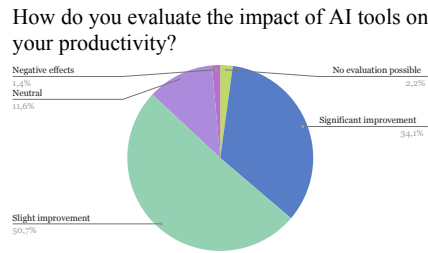


Fig. 8. Productivity Gains by GenAI

practical usability issues are less prominent than broader structural challenges. (Figure9)

4.6 Future Expectations

When asked about their intentions for the coming 12 months, 51 respondents reported plans for AI training for themselves or their teams, while 27 aim to work on developing proprietary AI solutions and 26 on acquiring software licenses for AI tools. Only a small group of 6 indicated plans to make use of in-house AI hardware. Notably, a majority of participants (106) stated that they currently have no specific AI-related activities planned, which may reflect limited strategic integration of GenAI in many organizations at this point, considering that only a small fraction already has a mature AI adoption where no further activities are necessary. (Figure 10)

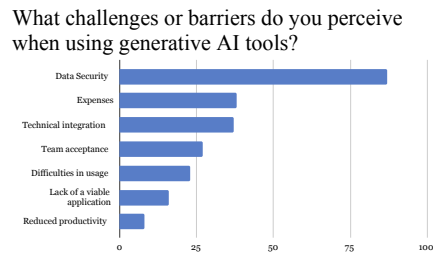


Fig. 9. Challenges in GenAI Adoption

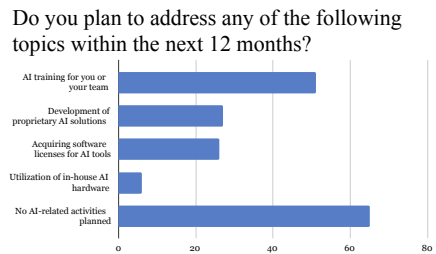


Fig. 10. Future Plans in Adoption of GenAI

5 Discussion

The adoption of Generative AI (GenAI) technologies in the German IT industry appears to follow differentiated trajectories shaped by organizational culture, technological openness, and perceived utility. Rather than a uniform trend, our findings indicate patterns that reflect both enthusiasm and hesitation.

5.1 Interpretation of Key Findings

Our data, while representing only a cross-sectional view, reveal patterns that align with established technology adoption frameworks [9]. These patterns suggest a clear distinction between early adopters and laggards in the GenAI implementation landscape. Participants from the international consulting firm exemplify the characteristics of early adopters or even first movers, with 100% reporting GenAI utilization in their professional activities.

In contrast, the national service provider presents a more complex adoption picture. Approximately half of the participants from this organization demonstrate GenAI adoption, suggesting a bifurcated technological culture. This division likely reflects the diversity typically found in IT departments, where some professionals actively embrace emerging technologies while others adhere to traditional methodologies. These technology-conservative professionals may deliberately avoid new tools, preferring established approaches to complete their tasks.

The current prominence of GenAI in technology discourse presents an interesting dynamic. Like many technological innovations experiencing peak hype, GenAI arrives with expansive promises that may outpace actual implementation results. Our findings indicate, however, that widespread technology adoption requires stronger motivators than publicity alone. The survey data reveal a compelling motivator: perceived productivity enhancement.

Despite 67.8% of participants self-assessing their proficiency as "beginner" or "intermediate" (Figure 7), an impressive 84.8% report productivity improvements—50.7% noting slight improvement and 34.1% reporting significant gains (Figure 8). This disparity between self-assessed skill level and reported productivity benefits suggests substantial untapped potential. As GenAI tools become more mainstream and user proficiency increases, we can reasonably anticipate even greater productivity enhancements across the IT industry.

However, not all respondents are equally enthusiastic about GenAI's integration. A noteworthy discrepancy arises when comparing the perceived benefits with the barriers cited. While only a small number of participants (8 out of 174) (Figure 9) explicitly mention reduced productivity as a concern, this hesitation reveals an important aspect: GenAI's utility is not universally and without doubt experienced as positive. These minority perceptions may stem from inefficiencies in tool integration, inappropriate application contexts, or user uncertainty, particularly among those who self-identify as "beginners" but may also indicate a more substantial criticism about the emerging technology.

Another crucial barrier, cited by 87 out of 174 respondents, is data security (Figure 9). This concern dominates the list of challenges and clearly outweighs the other issues. This highlights a central paradox in current GenAI deployment strategies: Although these respondents report their concerns about data security, a large majority, 128 participants, primarily rely on cloud-based services to run GenAI tools (Figure 4). This possible contradiction underscores the tension between the technical benefits of cloud infrastructure, such as scalability, rapid deployment and lower upfront costs and the strategic imperative to maintain control over sensitive data.

The low number of respondents (14) utilizing company-owned data centers suggests that, despite ongoing debates about compliance and data sovereignty, most organizations prioritize convenience and accessibility over full infrastructural autonomy. This trade-off becomes particularly relevant in the German and European context, where regulatory frameworks like the GDPR and the European AI Act impose strict requirements on how and where personal and organizational data can be processed. As such, the prevalent reliance on cloud solutions may reflect not a lack of concern, but a lack of viable alternatives that balance usability with compliance.

5.2 Implications for Practice

The findings of this study yield several practical implications for organizations seeking to effectively integrate GenAI technologies into their operational workflows:

Structured Adoption and Skills Development Programs Organizations should implement GenAI adoption programs that combine clear usage guidelines with targeted skills development. Despite only 26.3% of participants self-assessing as "advanced" users, 84.8% report productivity improvements, indicating significant untapped potential. Companies should establish formalized training pathways that progress users from basic to advanced competency levels, focusing on techniques like prompt engineering and usage of specialized tool like AI-based IDEs. Setting explicit management goals for GenAI adoption can further foster certainty of action and accelerate this process.

Strategic Management of Data Security Concerns Given that data security emerged as the primary concern (cited by 50% of respondents), organizations should include GenAI usage in their data governance frameworks. This could include implementing data classification schemes, establishing acceptable use policies for different data sensitivity levels, and creating clear protocols for what types of information can be processed through cloud-based GenAI services.

Hybrid Infrastructure Approach To balance accessibility with security concerns, organizations should consider a hybrid approach to GenAI infrastructure. Critical applications involving sensitive data could leverage company-owned infrastructure (currently used by only 14 respondents), while more general applications could continue using cloud-based services to maintain usability and cost-scalability.

These recommendations address the differentiated adoption patterns observed in our study and provide guidance for organizations navigating the tension between productivity benefits and security concerns that characterizes the current state of GenAI implementation in the German IT industry.

5.3 Limitations of the Study

The study is limited by a relatively small number of participants and a low diversity of participating companies. As a result, the findings reveal trends but cannot

be considered representative of the broader industry. Therefore a more comprehensive survey with larger sample size and greater organizational diversity is necessary to validate our initial findings and draw industry-wide conclusions.

6 Conclusion and Outlook

This study provides empirical insights into the current state of Generative AI adoption within the German IT industry. Our findings reveal a heterogeneous landscape characterized by significant adoption variability across different organizations, with some of them achieving full implementation while others show approximately 50% utilization rates.

The data demonstrates that GenAI tools are primarily being employed for research, knowledge dissemination, and content creation tasks, with ChatGPT emerging as the dominant platform. Potentials in tasks directly involving code-generation, bug-fixing and test-development remain high.

Despite most users self-identifying as having intermediate proficiency levels, the reported productivity improvements are substantial, with 84.8% of participants experiencing either slight or significant gains. This suggests considerable untapped potential as users continue to develop their skills and organizations integrate these technologies more systematically.

Data security remains the primary concern among respondents, creating a notable tension between the perceived benefits of GenAI and compliance requirements. This is particularly evident in the preference for cloud-based services despite expressed security concerns, indicating a practical compromise between accessibility and data protection.

Looking ahead, the trajectory of GenAI adoption in the German IT sector will likely be shaped by three key factors: the development of more sophisticated local infrastructure solutions that address data sovereignty concerns; increased organizational investment in formalized training and adoption frameworks; and the evolution of clear regulatory guidelines that balance innovation with compliance requirements.

7 Need for further Research

In section 5.1 we made the assumption that further productivity enhancements are to be assumed throughout the IT-industry. The validation of this assumption is part of future evaluations.

This paper presented a quantitative analysis on GenAI adoption; however, conducting qualitative interviews can uncover more insights in productivity gains as well as reasons for late adoption of this new technology. Furthermore, self-assessed productivity gains must be objectively evaluated against economical data. In fact it is to investigate if GenAI usage may also lead to dropping productivity as stated by a minority of our participants.

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Disclosure of Interests. Employees of regiocom SE also participated in the study survey. To maintain research integrity, data collection was conducted using independent third party infrastructure, all analysis was performed on anonymized data, and identical methodology was applied to all participants through the same questionnaire. Regiocom’s dual role has been explicitly disclosed in all research outputs. Readers should consider this potential conflict when interpreting results.

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