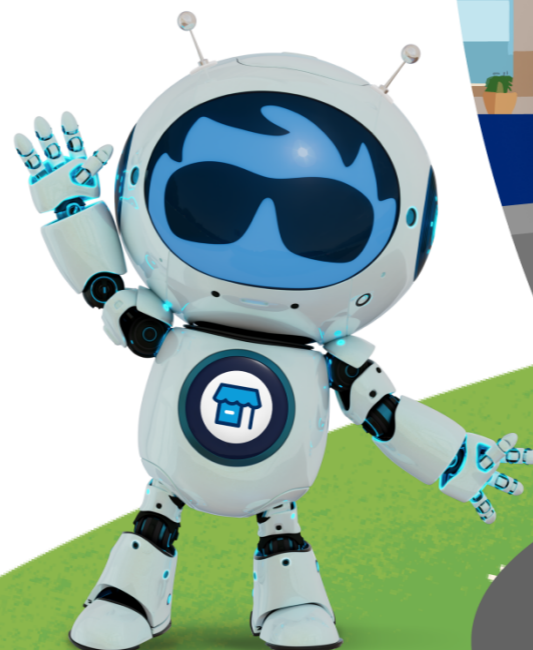




SIXTH EDITION

# Small & Medium Business Trends Report

Insights and trends from 3,350 small and medium business leaders worldwide.



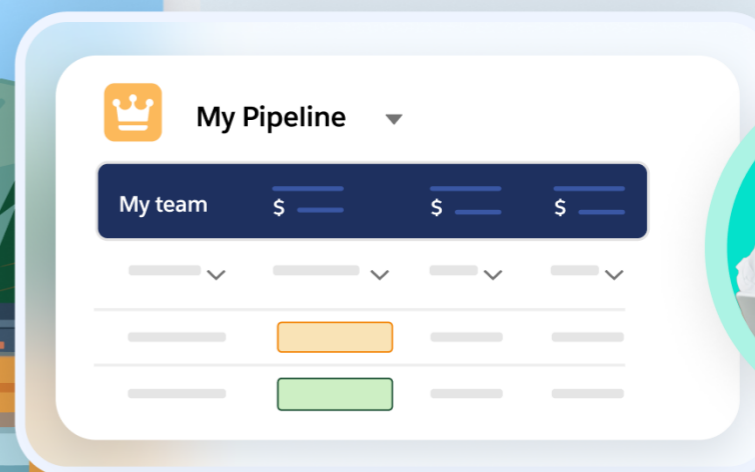
Automated Email Send



Email Open



Make Intro Call



Agentforce Service Agent

Card Upgrade Offer

Accept

Reject



## A Letter from Salesforce

**Kris Billmaier**

*EVP & GM, Sales Cloud  
and Self-Service &  
Growth Products*

Small businesses may have small teams, but they can have a big impact. Many are high-growth, with comparable revenues to much larger competitors, despite facing the same pressures with fewer resources.

As artificial intelligence (AI) evolves toward [autonomous agents](#), SMBs have a powerful opportunity to efficiently scale their operations. AI agents can independently handle both customer outreach and back-office tasks, letting smaller businesses do more with limited resources. SMBs embracing AI today are already seeing clear returns: increased productivity, personalized customer experiences, and revenue growth.

Our sixth “Small and Medium Business Trends” report, based on a survey of SMB leaders worldwide, reveals how forward-looking businesses are navigating this critical moment. The report explores:

- How SMBs are ramping up their tech investments to level the playing field against larger competitors
- What separates high-growth SMBs from others in their approach to data and technology
- What SMBs are learning as they implement AI

With AI and data, the future looks bright for SMBs. I hope you find this research helpful as you navigate your new era of growth.



# What You'll Find in This Report

For the sixth edition of the “Small & Medium Business Trends” report, Salesforce surveyed 3,350 leaders from small, medium, and growth businesses (SMBs) – those with 200 or fewer employees. The global survey uncovers:

- What distinguishes growing SMBs from their peers
- How SMBs are strategizing their tech stack to achieve their goals
- AI's impact on productivity and revenue, and SMBs' plans for its expansion

Due to rounding, not all percentage totals in this report sum to 100%. All comparison calculations are made from total numbers (not rounded numbers).

Data in this report is from a double-anonymous survey conducted from August 3, 2024, through September 16, 2024. Respondents represent 26 countries across six continents. All respondents are third-party panelists. For further survey demographics, [see page 47](#).



**3,350 leaders from small- and medium-sized businesses surveyed worldwide**

# What You'll Find in This Report

## Company Performance Levels

Throughout this report, we classify survey respondents across the following tiers, based on changes to revenue over the past 12 months.

**62%**

**Growing**

Revenue increased  
over 5%



**30%**

**Stagnant**

Revenue changed between  
-5% and +5%

**8%**

**Declining**

Revenue decreased  
over 5%

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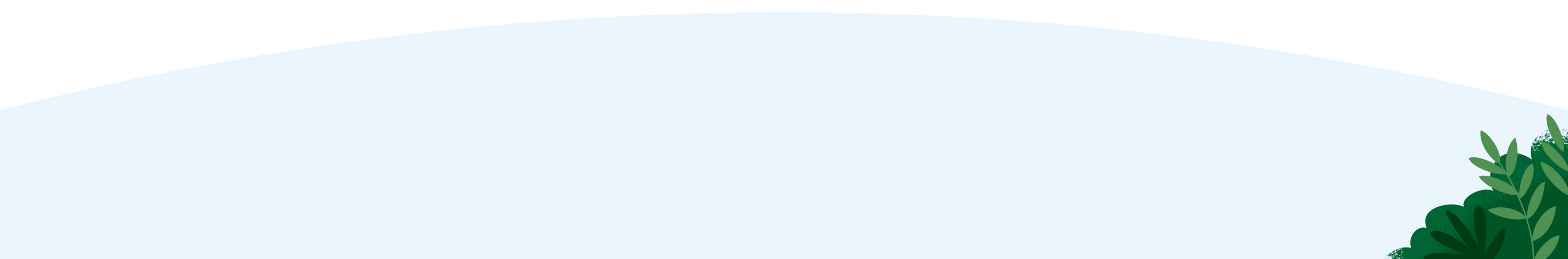
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# Executive Summary

In pursuit of efficiency and growth, SMBs are ramping up their tech investments to forge stronger customer relationships and scale growing operations. They recognize how important it is to embrace AI and prioritize data strategies that provide speed, reliability, and a clear understanding of their customers – all while earning and maintaining trust. These proactive, strategic moves position SMBs to thrive alongside larger competitors in a rapidly changing business landscape.

## 01 SMBs See a Bright Future Ahead

SMBs are actively pursuing growth and boldly taking on larger competitors. **Eighty-one percent of SMB leaders are optimistic about their business' future.**

## 02 Tech Investments Pave the Way for Growth

Technology investments are increasing. While leaders are confident in their strategies, some are overwhelmed by the pace of technological change, the number of tools, and rising security concerns. **Seventy-six percent of SMBs spend more on technology now than they did last year.**

## 03 SMBs Embrace AI as the Agentic Age Dawns

SMBs aren't just adopting AI. They're doubling down on investments in light of boosts to revenue, productivity, and customer experience. In fact, **90% of SMBs with AI report more efficient operations.**

## 04 Smart Data Strategies Change the Game

SMBs see the explosion of data and the opportunities it opens, and are prioritizing efforts to organize and secure it. **Sixty-six percent of SMBs are increasing their investment in data management.**



# 1

## SMBs See a Bright Future Ahead



# Growing SMBs Prioritize Experience

Running an SMB is a high-risk, high-reward endeavor. Let's face it – there are few safety nets for businesses navigating ever-shifting economic and technological landscapes.

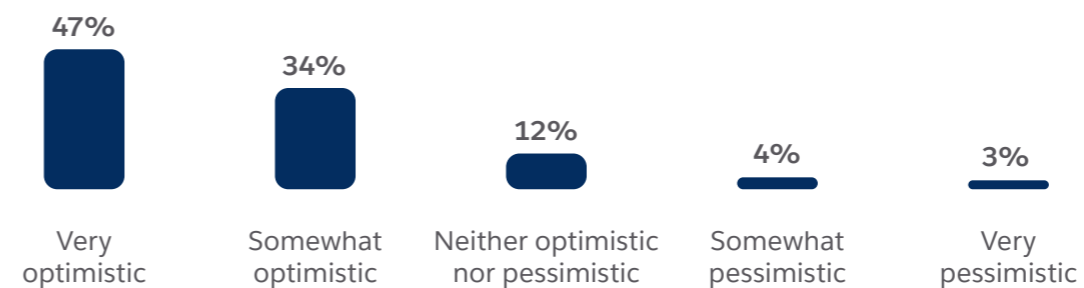
Despite uncertainties, today's SMB leaders remain optimistic: **Eight in 10 are confident about the future of their businesses.**

However, some SMBs demonstrate stronger performance than others – and their priorities may hint at why.

The #1 goal of stagnant and declining SMBs is to chase new customers. Meanwhile, growing SMBs focus on improving the experiences that attract customers in the first place. These leaders also prioritize upgrading existing tech and rolling out new solutions to strengthen their business.

## SMBs Focus on Improving Technology, Empowering Customers, and Employees

### SMB Leaders' Optimism About Their Business' Future



### Top SMB Priorities

#### Growing SMBs

- 1 Improve customer experience
- 2 Improve use of existing tools / technology
- 3 Implement new tools / technologies

#### Stagnant SMBs

- 1 Acquire new customers
- 2 Improve customer experience
- 3 Build customer loyalty

#### Declining SMBs

- 1 Acquire new customers
- 2 Cut costs
- 3 Target new markets

01

# SMBs Feel Well-Positioned Against Larger Competitors

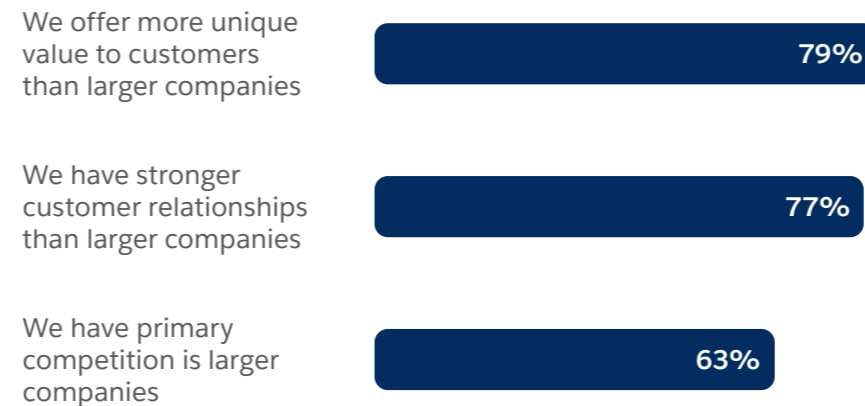
While SMBs are often seen as underdogs, SMB leaders feel their businesses offer unique value and forges stronger customer relationships than their larger competitors do.

**Over six in 10 SMB leaders view their primary competitors as larger companies, rather than businesses their size.**

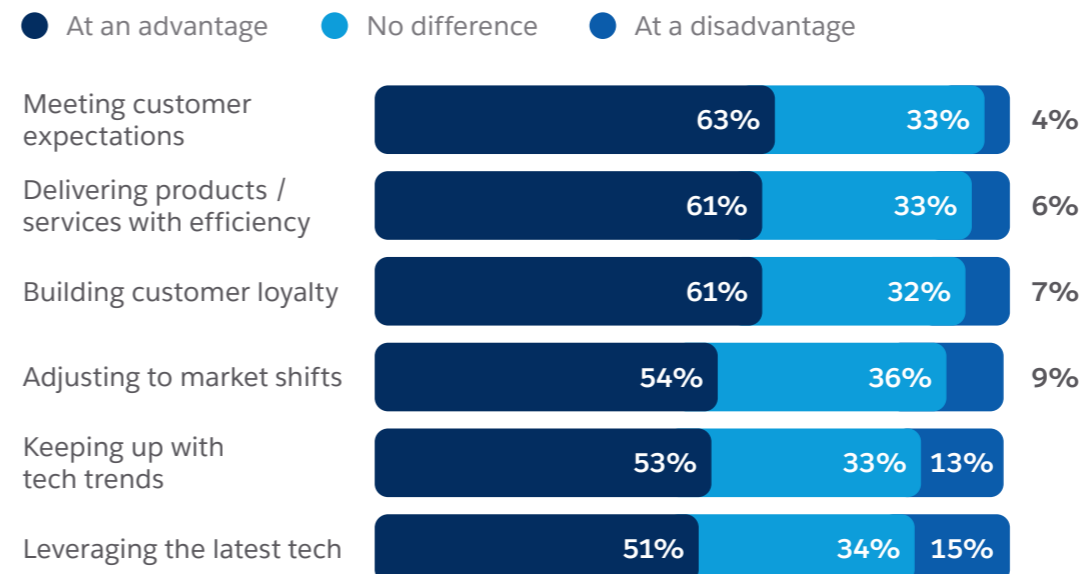
Overall, SMB leaders feel well-positioned against their larger competitors. Although SMBs may have fewer resources, they excel at adapting and responding to market conditions quickly. In fact, 54% of SMB leaders feel at an advantage when adjusting to market shifts.

## SMBs Say They Have an Edge for Satisfying Customers, Delivering Unique Value

### SMB Leaders Who Agree with the Following Statements



### How SMB Leaders View Themselves Against Larger Companies



# SMBs Tackle Tech Challenges

While growing revenue and attracting customers are the most challenging tasks for SMBs, keeping up with technology also ranks high.

As enterprises continue to digitize, over half of SMB leaders are concerned about falling behind technologically, and nearly as many admit they feel overwhelmed by the pace of technological change.

Despite this, SMB leaders believe their companies are making smart decisions about technology and that their tech sets them up for success.

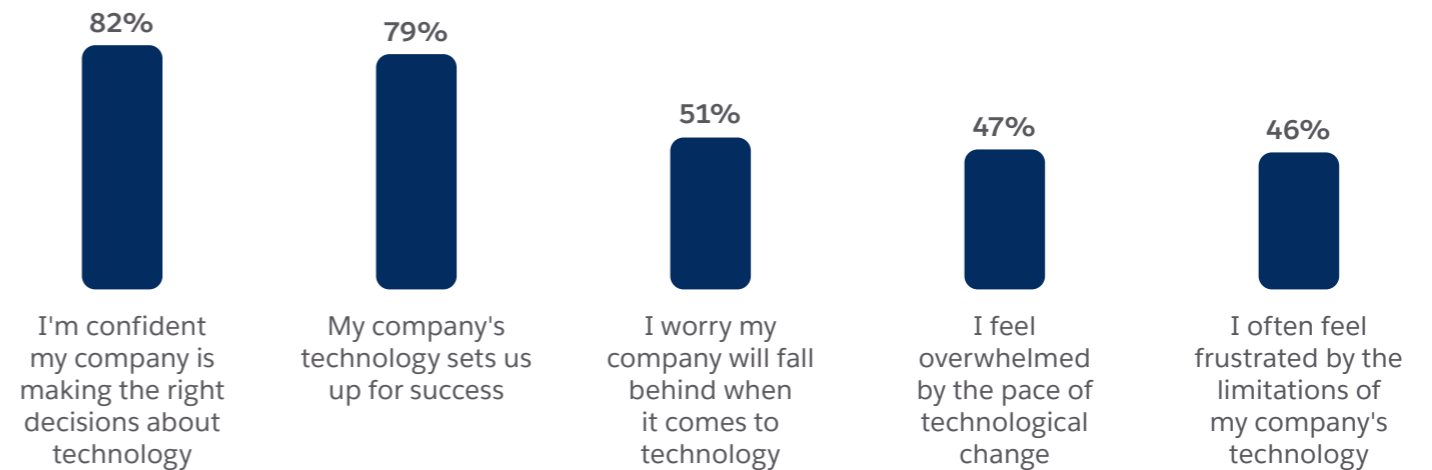
## Besides Growing the Business, SMBs' Top Challenge Is Keeping Up with Technology

### Top SMB Challenges

- 1 Increasing sales revenue
- 2 Acquiring new customers
- 3 Keeping up with changing technology
- 4 Competition from other businesses
- 5 Retaining existing customers

[See full list on p. 31.](#)

### SMB Leaders Who Agree with the Following Statements



# 2

## Tech Investments Pave the Way for Growth



02

# SMBs Ramp Up Tech Investments

To address concerns of falling behind in technology, SMBs are proactively increasing investment. Tech spending is on the rise among SMBs, with 76% spending more on technology now than they did last year, and only 5% cutting back.

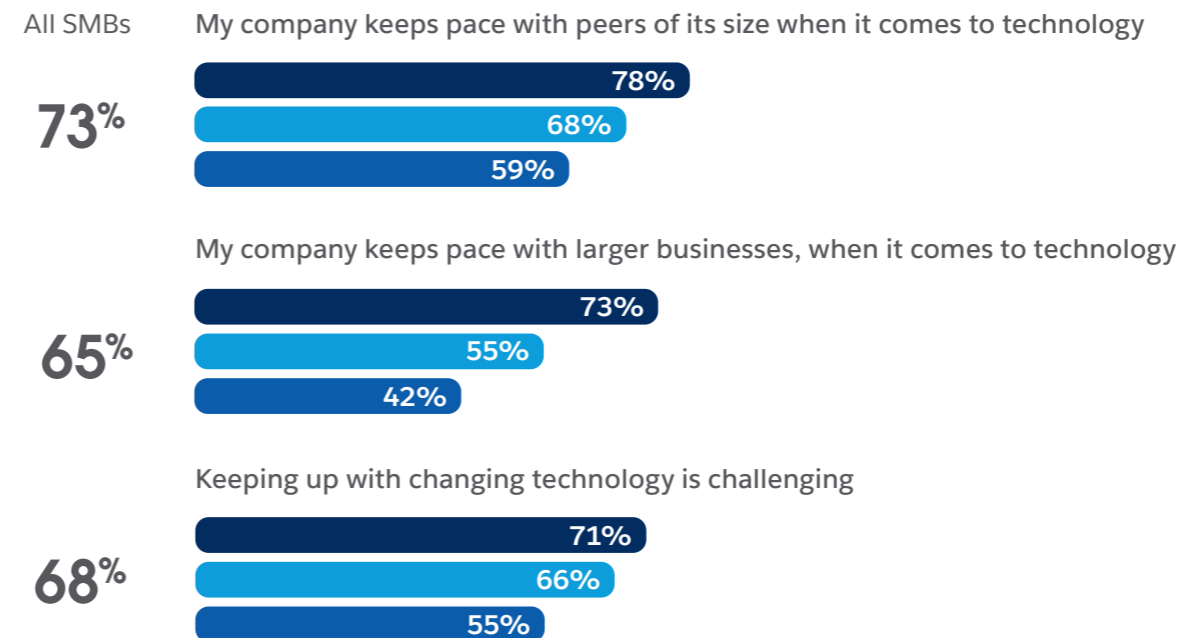
When it comes to tech, most SMBs believe they're keeping pace with competitors of similar and larger sizes. However, SMBs with declining revenue are more likely to lag behind their larger competitors.

Growing SMBs are more likely to struggle to keep up with advances in technology, indicating they take the task seriously, and that less successful peers may be underestimating the challenge in front of them.

## Growing SMBs Exhibit Stronger Investments and Confidence

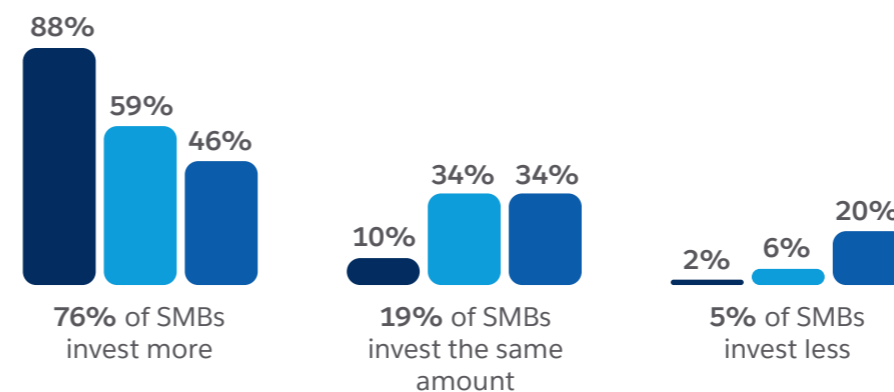
### SMB Leaders Who Agree with the Following Statements

● Growing SMBs ● Stagnant SMBs ● Declining SMBs



### SMB Technology Investment Compared to a Year Ago

● Growing SMBs ● Stagnant SMBs ● Declining SMBs



## 02

# Growing SMBs Consolidate Their Tech Stacks

While SMBs largely embrace technology, having too many tools is not necessarily better.

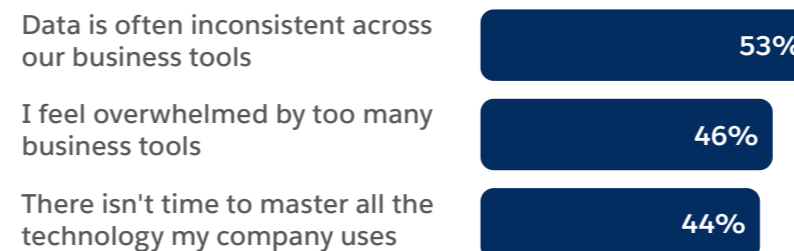
The average SMB uses seven different business applications, which can feel overwhelming without sufficient resources and technical expertise. For example, over half of SMB leaders report frequent data inconsistencies across their various tools.

Compared to their stagnant or declining peers, growing SMBs are more likely to describe their tech as an integrated suite. According to a separate study, this approach can reduce time wasted: small business owners lose 1.5 hours daily to wasted time, with nearly a fifth attributing some of this to context switching between multiple applications.<sup>1</sup>

<sup>1</sup>[Slack Small Business Productivity Trends, 2024](#)

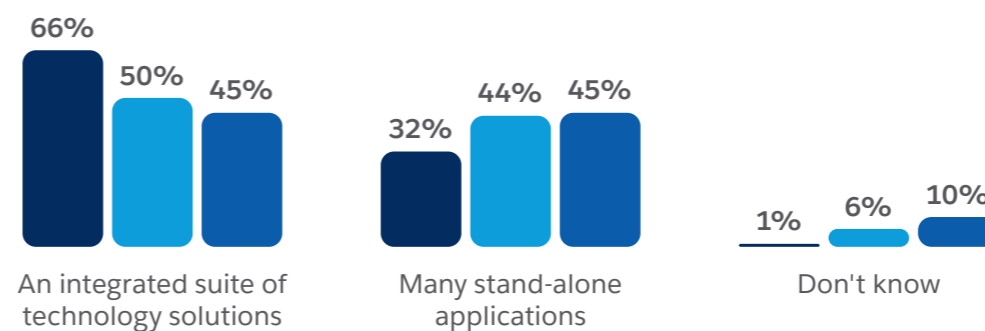
## Almost Half of SMB Leaders Feel Overwhelmed by Too Many Business Tools

### SMB Leaders Who Agree with the Following Statements



### SMB Leaders' Description of Their Technology Mix

● Growing SMBs ● Stagnant SMBs ● Declining SMBs



02

# Leaders Weigh in on Their Biggest Tech Challenges

As SMBs become increasingly technology-driven, they face new challenges.

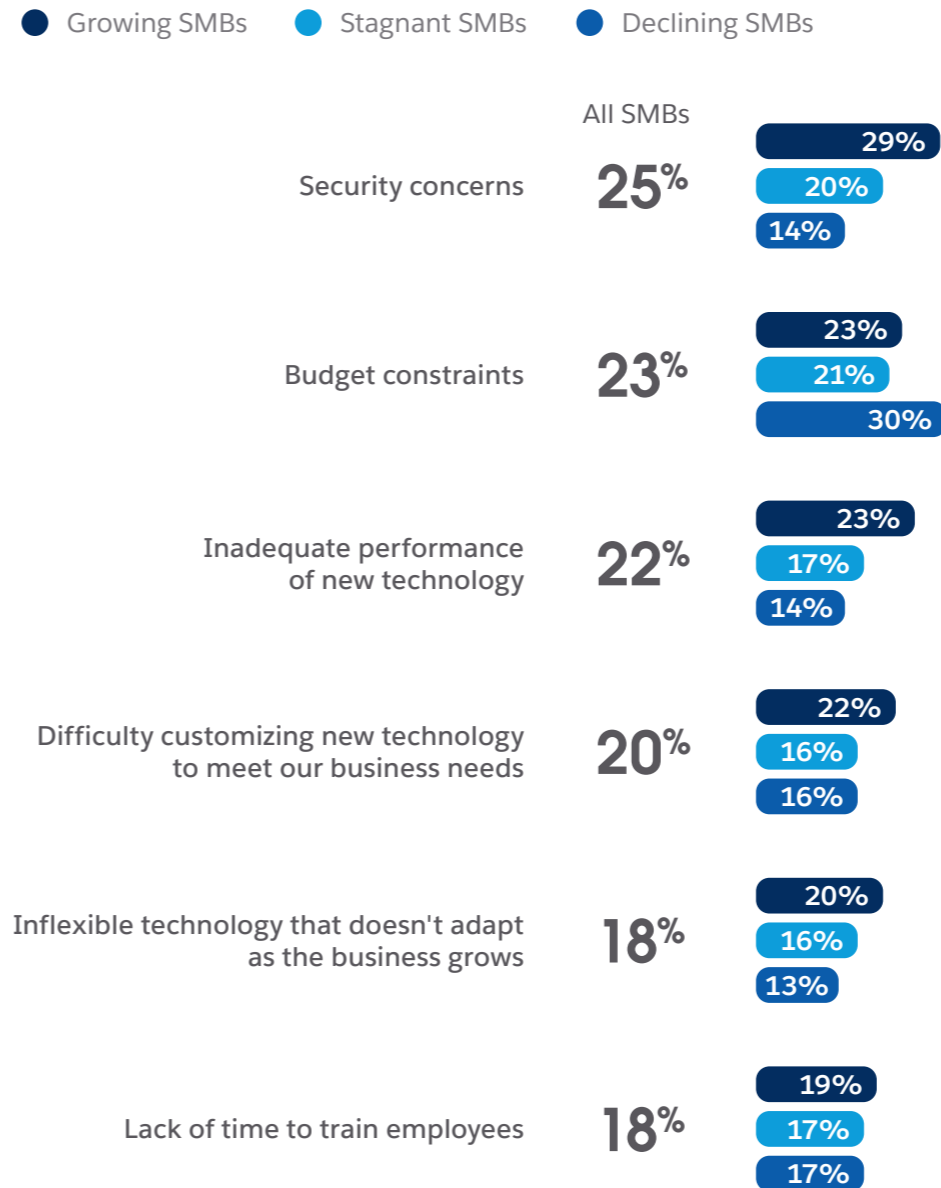
Unsurprisingly, SMBs with declining revenue are more likely to feel the pressure of budget constraints.

Meanwhile, growing SMBs are twice as likely to voice security concerns, such as data breaches, phishing attacks, and ransomware.

Additionally, leaders from growing SMBs seem to demand more from their technology, with a larger share expressing issues around technology performance, customization, and scalability.

## Security Is a Bigger Tech Hurdle Than Budget

SMB Leaders Who View the Following As Major Challenges



# AI Leads in Tech Investment Considerations

When SMBs evaluate new technology, they consider many factors, including functionality, price, ease of setup and maintenance, customer service quality, and more.

Growing SMBs primarily focus on AI capabilities, a consideration that doesn't even crack the top three of their less successful peers. In contrast, stagnant and declining SMBs look at price first and foremost.

**When evaluating technology, 40% of leaders at growing SMBs say AI capabilities are extremely important, vs. 23% at declining SMBs.**

## Growing SMBs Prioritize AI More Than Their Stagnant and Declining Peers

### Top Factors for Evaluating New Technology

#### Growing SMBs

- 1 AI capabilities
- 2 Ease of use
- 3 Compatibility with existing infrastructure or systems

#### Stagnant SMBs

- 1 Price
- 2 Ease of use
- 3 AI capabilities

#### Declining SMBs

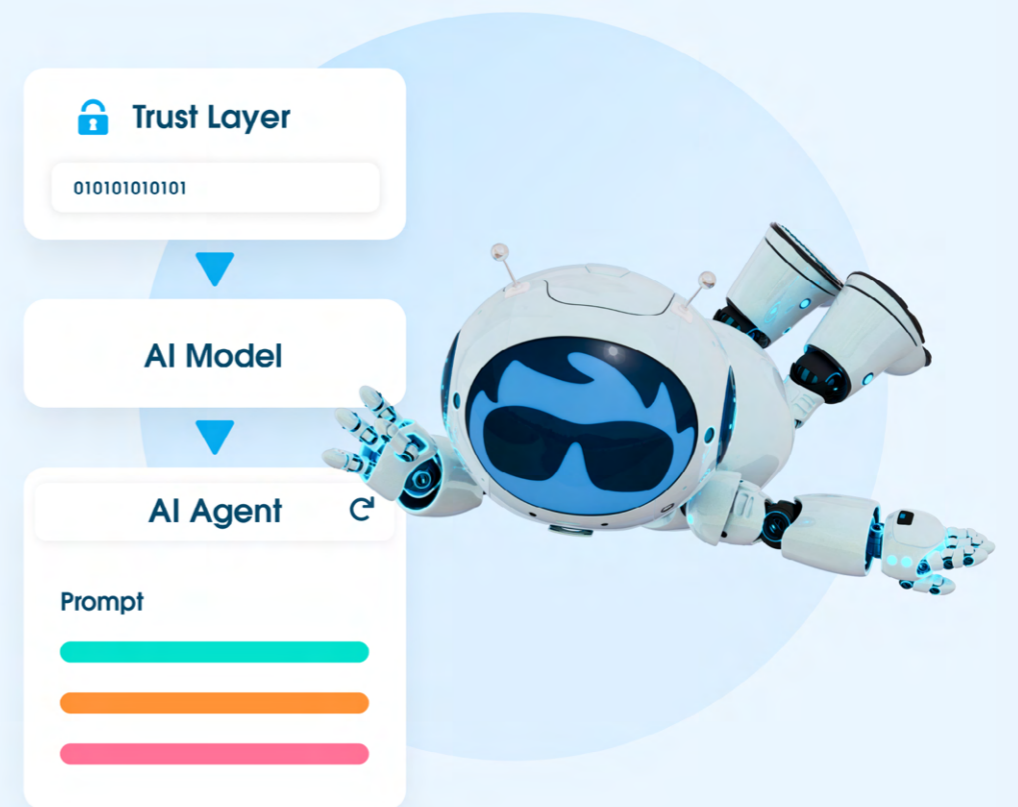
- 1 Price
- 2 Ease of use
- 3 Ease of set up

Ranked by responses of extremely important.



# 3

## SMBs Embrace AI as the Agentic Age Dawns



03

## More SMBs Use AI Than Some Assume

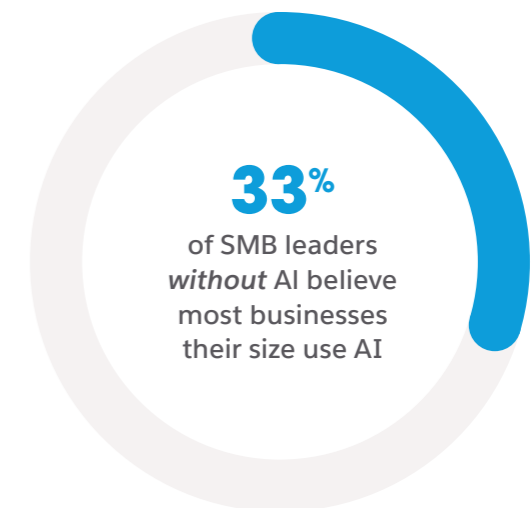
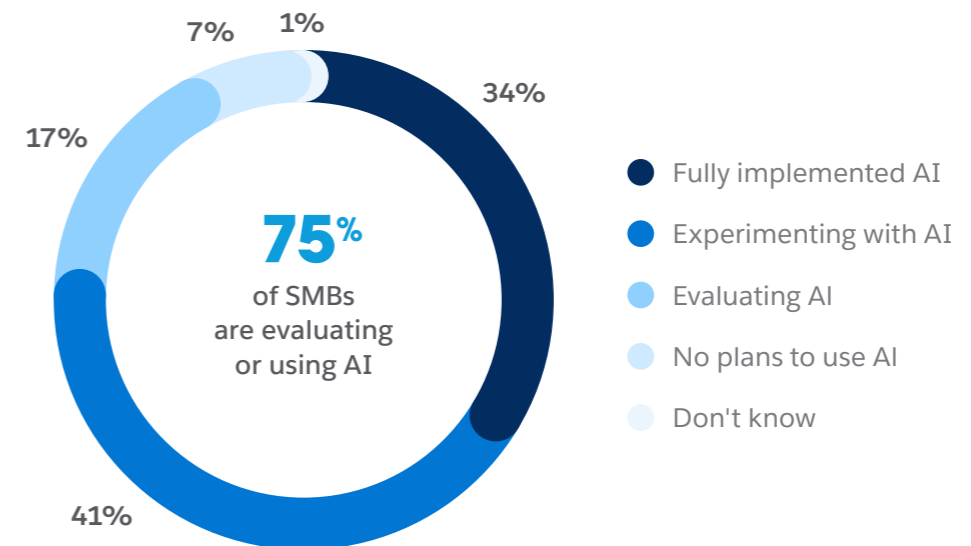
You might think of AI as a tool for large enterprises, but it's a game changer for SMBs, too.

Today, 75% of SMBs are investing in AI in some capacity, with over a third saying they've fully implemented AI in their operations.

**Growing SMBs are 1.8x more likely to invest in AI than declining SMBs.**

SMBs without AI underestimate the technology's prevalence among their peers. While 80% of those with AI know it's a commonly used tool in their space, only a third of those without the technology agree.

### Three-Fourths of SMBs Currently Invest in AI in Some Capacity



03

# AI Investment Increases to Serve Broad Use Cases

SMBs most commonly use AI to optimize marketing campaigns, generate content like emails and blog posts, and personalize customer recommendations. And they're looking to double down: three in four SMBs plan to increase their AI investment over the next year, and only 4% plan to decrease it. **Seventy-eight percent of business buyers expect AI to match human capabilities within the next decade.<sup>1</sup>**

As AI advances, it unlocks a world of possibilities for companies. This includes AI acting without human involvement in support of customers and employees across the business. Salesforce sees autonomous intelligent agents as the next chapter in AI's evolution, building on the foundation laid by predictive and generative AI.

**85% of SMBs with AI say they'll get a return on their investment.**

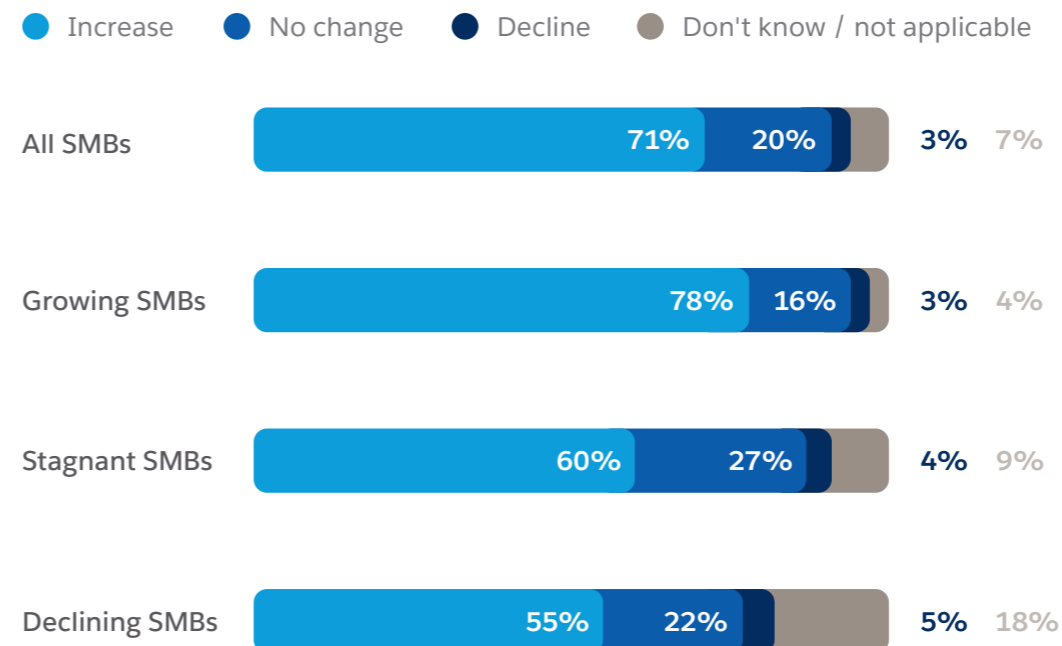
<sup>1</sup>[Salesforce State of the Connected Customer, 2024](#)

## SMBs Adopt AI for Uses Across the Business

### Top AI Use Cases

- 1 Marketing campaign optimization
- 2 Content generation
- 3 Automated recommendations for customers
- 4 Natural language search tools
- 5 Automated service chatbots

### Expected Change in AI Investment Over Next Year



03

# SMB Leaders Agree: AI Delivers Results

AI's benefits extend to SMBs' employees, customers, and bottom lines. This is a big deal for any business, but especially those with fewer resources to spare.

**Nine in 10 SMBs with AI experience more efficient operations.**

Meanwhile, AI's efficiencies, personalization, and scalability improve customer experience by, for example, increasing delivery speed, customizing services, and more.

**78% of SMB leaders at companies with AI say that the technology will be a game changer for their company.**

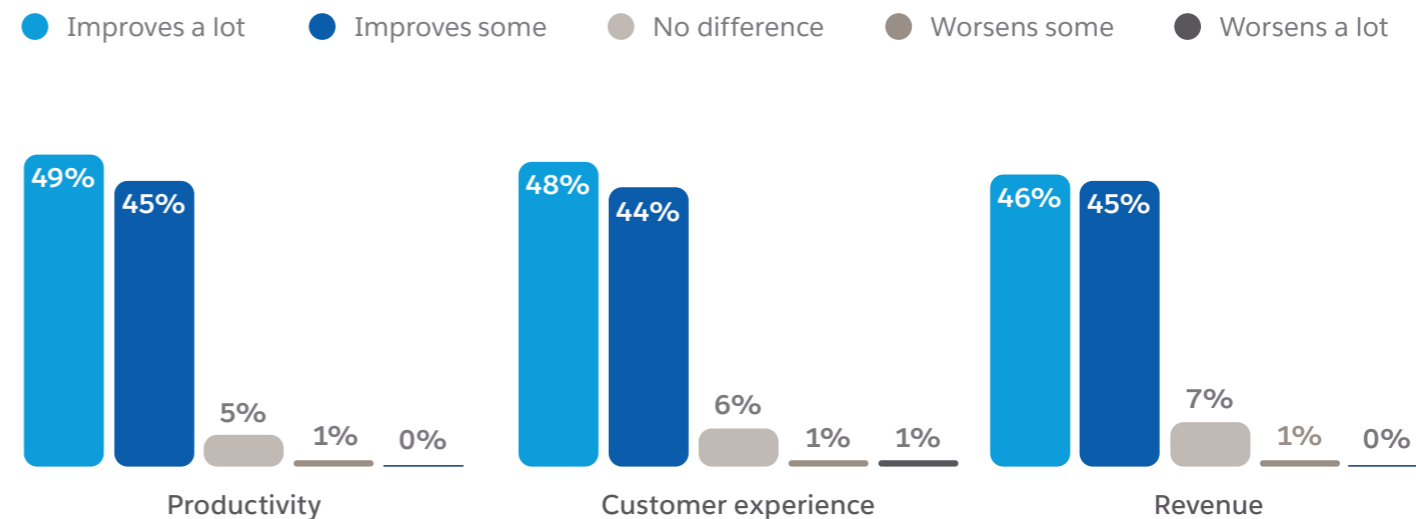
## SMB Leaders Report Improvements to Productivity, Customer Experience, and Revenue

SMB Leaders Who Agree with the Following Statements



Base: SMBs that use AI.

## Reported Impact of AI on the Following Metrics



Base: SMBs that use AI.



03

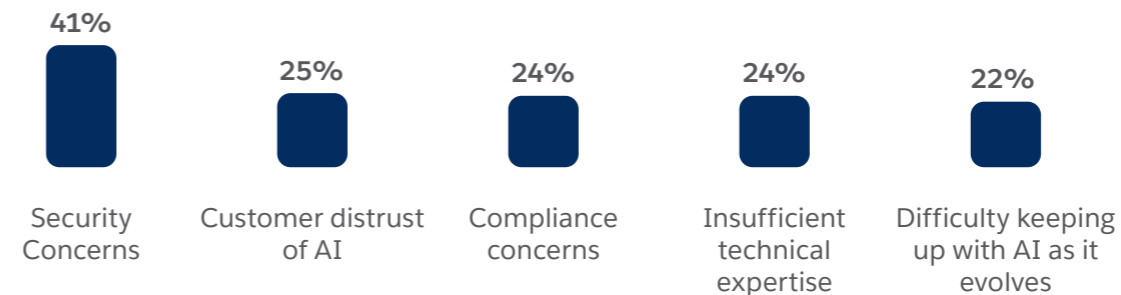
# Security Tops SMB AI Concerns

While AI may be a boon for businesses, it's not without its challenges. Far and away, the biggest concern is security. When not properly secured for business use cases, as is the case for consumer-grade products, AI can introduce risks of data breaches and exposing sensitive information.

Beyond security, different industries are grappling with their additional anxieties around this new technology. For instance, the financial services industry is particularly concerned about integrating AI with their myriad legacy systems, and retailers are wary of customers' distrust as they ramp up AI use.

## Security Remains a Top Concern Across Industries

### Top Concerns About AI



### Industries' Top Concerns About AI



#### Financial Services

- 1 Security concerns
- 2 Poor integration with existing technology (*tie*)
- 2 Difficulty keeping up with AI as it evolves (*tie*)



#### Automotive

- 1 Security concerns
- 2 Compliance concerns
- 3 Ethical concerns



#### Retail

- 1 Security concerns
- 2 Customer distrust of AI
- 3 Inaccurate outputs



#### Technology

- 1 Security concerns
- 2 Customer distrust of AI
- 3 Insufficient technical expertise

Base: SMBs that use AI.

[See more industries on p. 38.](#)

## Expert Perspective on Ethics in the Age of Agentic AI

### What ethical concerns are you hearing about autonomous AI agents?

As an enterprise AI company, the risks we focus on are accuracy, bias, toxicity, safety, and privacy. And we're not alone with these ethical concerns – the public, our customers, and regulators are paying very close attention as AI technologies rapidly progress. These risks aren't new, but as AI moves from generating content to taking action on our behalf, ensuring trustworthy AI is more important than ever.

### What data risks are customers most concerned about with autonomous AI agents?

As we know, agentic AI is not without risks. For this next evolution of agentic AI, we're focused on tools that allow people to lean in on the highest-risk, highest-judgment decisions – and delegate the rest. To be clear, this doesn't mean humans are in the loop of every AI output – that doesn't work anymore. Instead, we're focused on intentional design and system-level controls that supports both humans and AI. For example, empowering humans to keep a bird's-eye view of their AI and enabling agentic AI to escalate to humans when necessary.

### What can companies do to prepare?

Start with a focus on the data. Good data is core to good AI. It's always been important for organizations to collect quality data and ensure transparency and consent in the collection process. It's also crucial to keep in mind that ethics and intention matter. Organizations should have a clear strategy for how they plan to use AI agents to enhance their business, and then ensure they are transparent about when and how the AI is used. People need to know when they are interacting with AI agents versus human agents.



**Paula Goldman**

Chief Ethical and Humane Use Officer,  
Salesforce



03

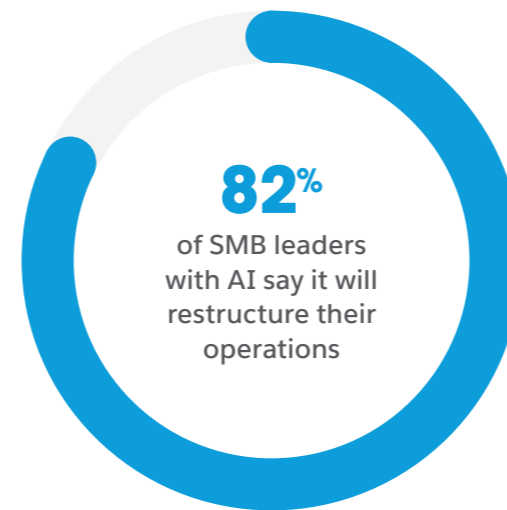
# SMBs Foresee Reimagined Operations

AI isn't a small adjustment; it's a radical shift. In fact, 82% of leaders at organizations with AI say it'll reshape how they operate.

Preparing to use AI requires thorough planning, investment, and training. Once it's implemented, SMBs may pursue additional technological, procedural, and organizational changes.

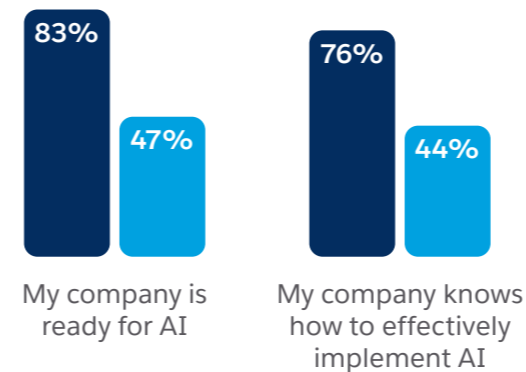
As SMBs expand their use of AI, they gain confidence, exhibiting significant jumps in their perceived knowledge readiness as they move from evaluation to experimentation.

## SMBs Are Learning AI As They Go



## SMB Leaders Who Say the Following

● Experimenting with AI    ● Evaluating AI use cases



# 4

## Smart Data Strategies Change the Game



## 04

# SMBs Struggle Translating Data Into Insights

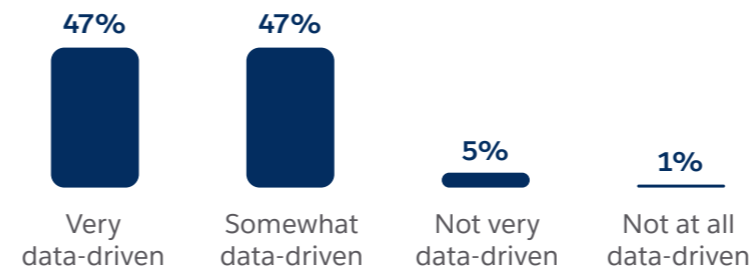
Quality data is the foundation of many business processes – from personalizing customer interactions and analyzing performance to training AI to reach its full potential.

While virtually all SMB leaders believe their companies are at least somewhat data-driven, less than half say they're *very* data-driven. This could lead to tangible obstacles that hinder SMBs from translating data into insights and actions.

The biggest factors that hold back data-driven operations are a lack of resources and expertise to analyze data and implement insights. Additionally, SMBs grapple with technical hurdles, like integrating data from multiple sources and importing data from external systems.

## SMBs Often Lack Data Resources and Expertise

Extent to Which Leaders Feel Their SMBs Are Data-Driven



[Salesforce State of Analytics, November 2023](#)

## Ranking of SMB Challenges to Acting on Data

- 1 Lack of resources / expertise to extract data for analysis
- 2 Lack of resources / experience to act on insights
- 3 Integrating data from separate sources
- 4 Lack of resources / expertise to understand insights
- 5 Importing data from external sources
- 6 Integrating insights into existing processes
- 7 Organizational silos

## 04

# Data Management Investments Are Increasing

Most SMB leaders agree that improving their company's data quality will boost productivity and revenue. Over the next year, **66% of SMBs plan to increase their investment in data management** – a number that's even higher for SMBs using AI.

Effective data management has always been important, but AI raises the stakes, as its performance depends heavily on the quality of the underlying data.

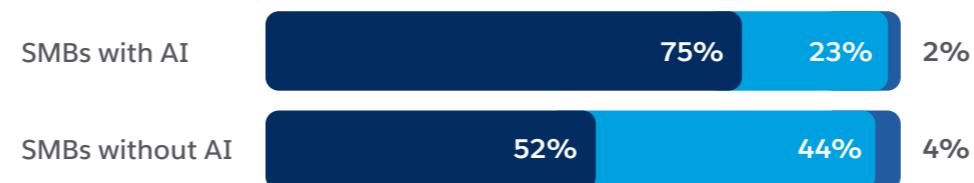
**85% of SMB IT professionals say AI's outputs are only as good as its data inputs.<sup>1</sup>**

<sup>1</sup>Salesforce, State of Data & Analytics survey data, 2023.

## SMBs with AI Are Especially Eager to Improve Their Data Management

### Expected Change in Data Management Investment Over Next Year

● Increase ● No change ● Decrease



Responses of don't know and not applicable are not included in base.



## 04

# Data Security Shows Room for Improvement

Data volumes increase business opportunities, but they also increase risk. However, SMB leaders feel up to the task.

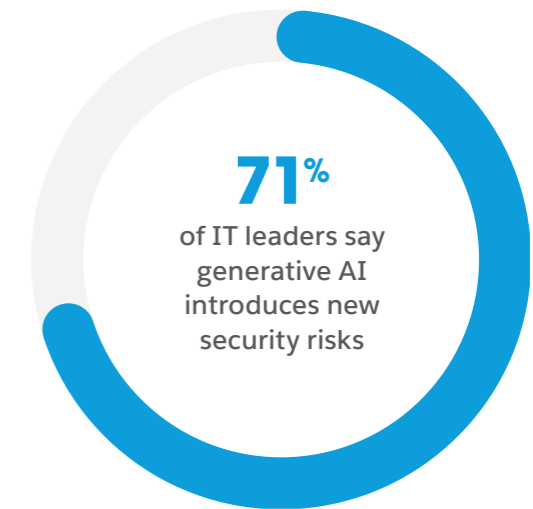
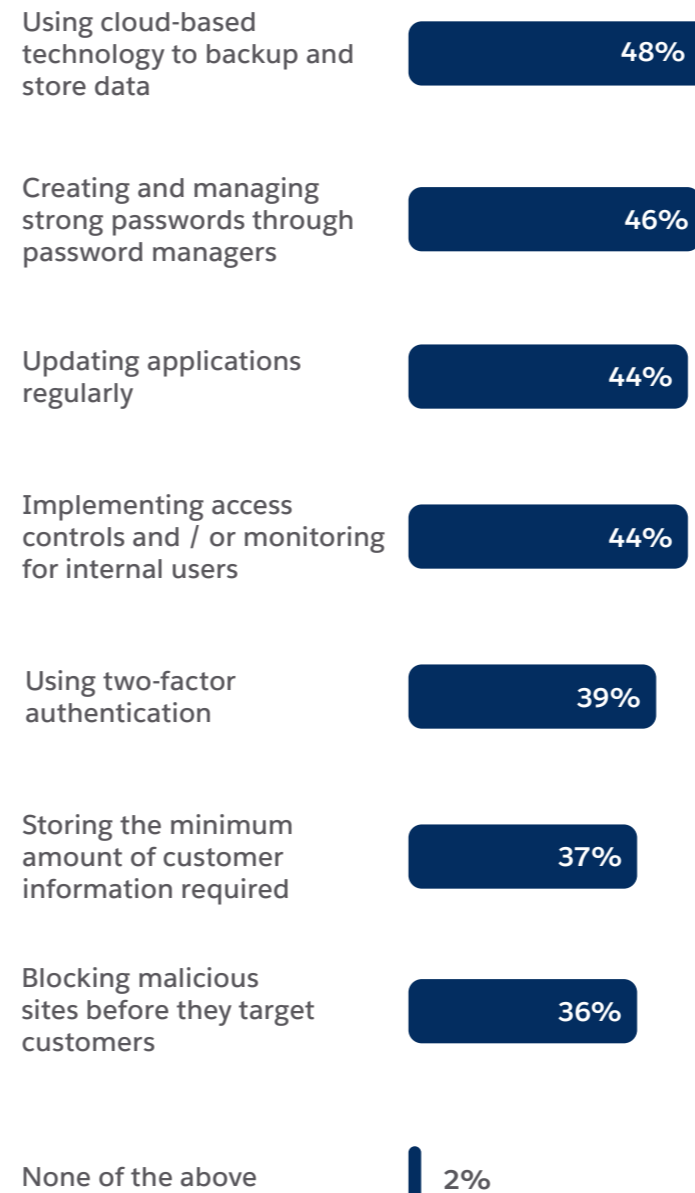
**84% of SMB leaders are confident their companies can keep sensitive data secure.**

Despite this confidence, SMBs could benefit from a closer look at their data security practices. Asked about specific security measures like application updates, two-factor authentication, or even basic password protection, fewer than half of the SMB leaders surveyed said they used any of them.

IT leaders suggest security measures become increasingly important in the age of generative AI, as threats grow more sophisticated and the use of consumer tech like ChatGPT unintentionally exposes company data.

## As Risks Heighten in the AI Era, Opportunities Remain to Deepen Security

### Actions Taken to Secure Company And Customer Data



[Salesforce, Generative AI Snapshot Series, 2023](#)





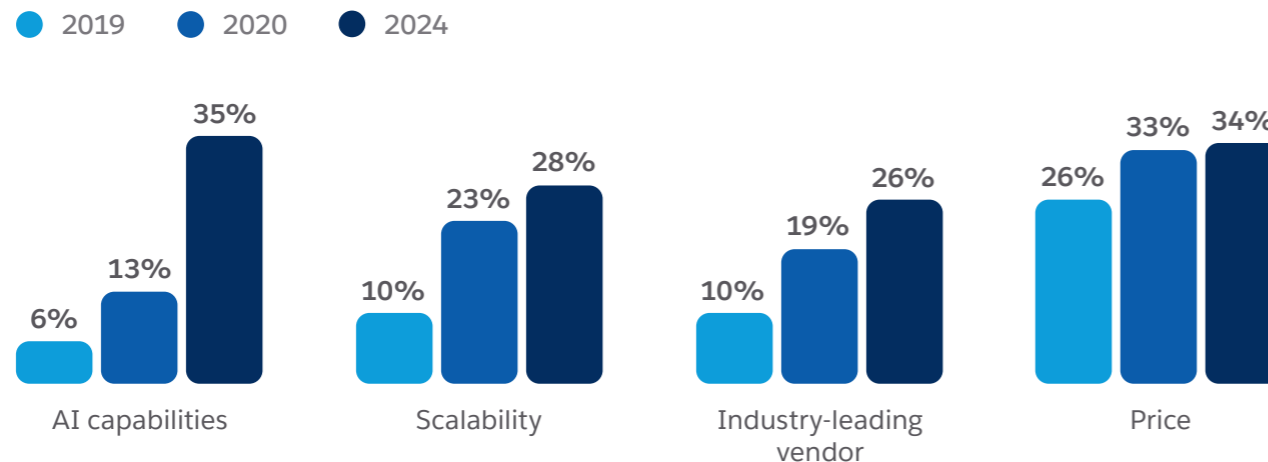
## Look Ahead: The Growing Importance of Trust and Scale

As technology plays an ever-increasing role in SMBs' growth trajectories, leaders are examining what matters in choosing the right partners.

Price remains a critical factor in technology evaluation, but other factors like scalability, industry reputation, and especially AI capabilities have soared in importance.

Additionally, eight in 10 SMB leaders say they're willing to spend more on trusted vendors and scalable technology.

### SMB Leaders Who Describe the Following as Extremely Important for Evaluating New Tech



### SMB Leaders Who Agree With the Following Statements



# Autonomous Agents: The Next Wave of Artificial Intelligence

Generative AI only recently took the world by storm, but a new wave is already here – autonomous agents. While generative AI can create new content based on a prompt, agents will perform tasks without human intervention.

For example, if a customer wants to plan a trip to an unfamiliar location, agents won't just offer intelligent service recommendations. They will actually take concrete actions on a customer's behalf: visiting websites, making plans, and even booking tickets.



“ All small businesses could use an extra pair of hands – without the cost of additional headcount. That's the power of autonomous agents, like Salesforce Agentforce. But great AI needs great data. Salesforce provides SMBs with an integrated tech stack that connects customer data and applications to a trusted platform, which fuels smarter AI. We're focused on doing everything we can to help SMBs be more productive, effective, and drive growth. ”

**Kris Billmaier**

EVP & GM, SALES CLOUD AND SELF-SERVICE & GROWTH PRODUCTS



## Predictive AI

Uses historical data to recognize patterns over time

## Generative AI

Creates new content based on user prompts

## Agentic AI

Performs tasks without human intervention

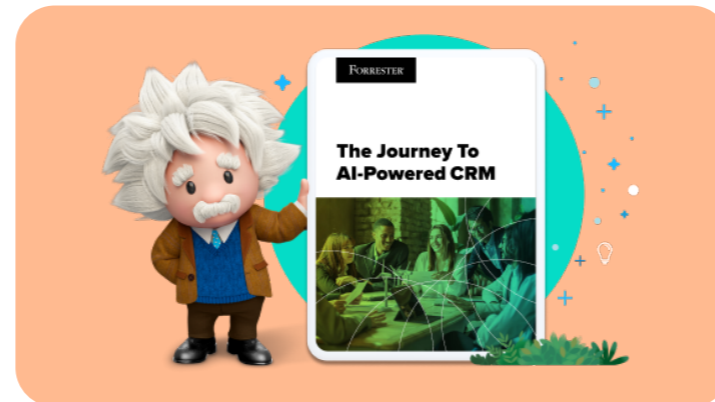
Explore agent use cases →

# Explore more resources for SMBs.



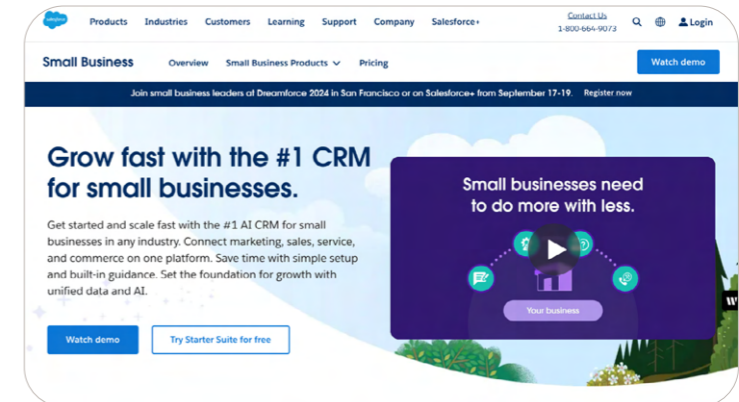
## The Guide to AI for Small Businesses

Everything you need to identify the best use cases for AI, build an AI strategy, and get inspired by other small business AI stories.

[Get the guide](#)

## The Journey to AI-Powered CRM

Forrester Consulting surveyed over 700 global business leaders for their take on succeeding with AI for CRM.

[Get the report](#)

## Salesforce for Small Business

Discover all the AI-powered solutions for small and growing businesses.

[Explore solutions](#)

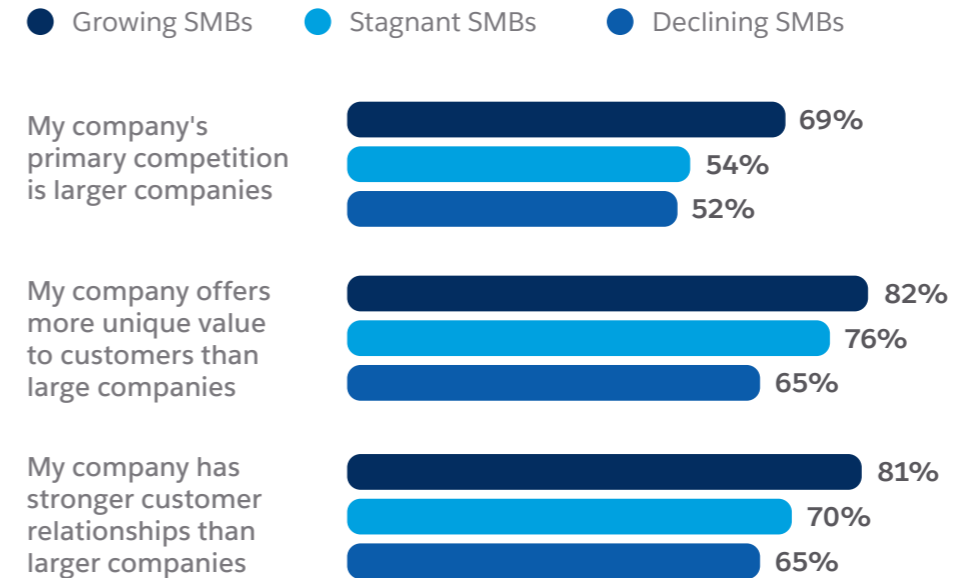
# Appendix



## SMB Leaders Who Say the Following Is Challenging



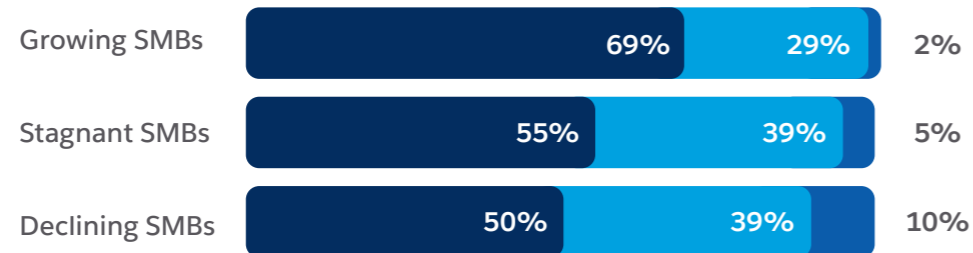
## SMB Leaders Who Say the Following



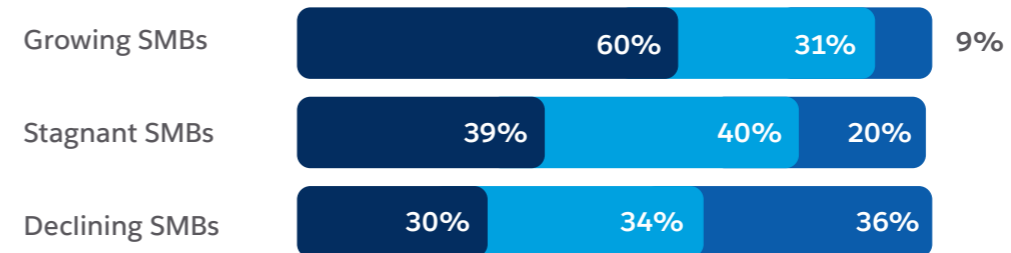
## SMBs' Perceived Advantages or Disadvantages Versus Larger Competitors

● At an advantage    ● No difference    ● At a disadvantage

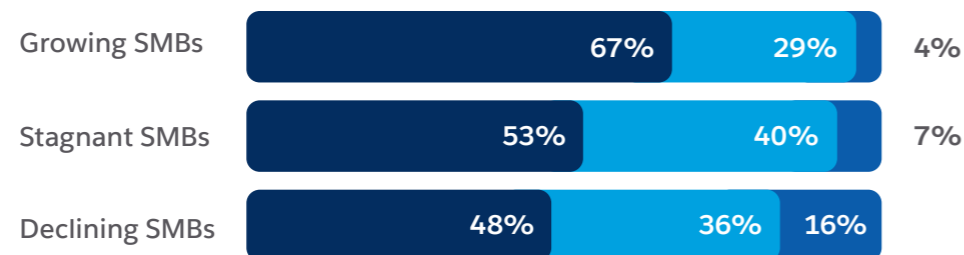
### Meeting Customer Expectations



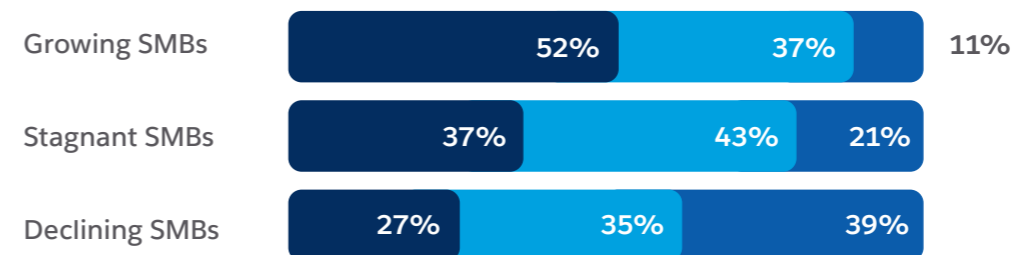
### Leveraging The Latest Technology



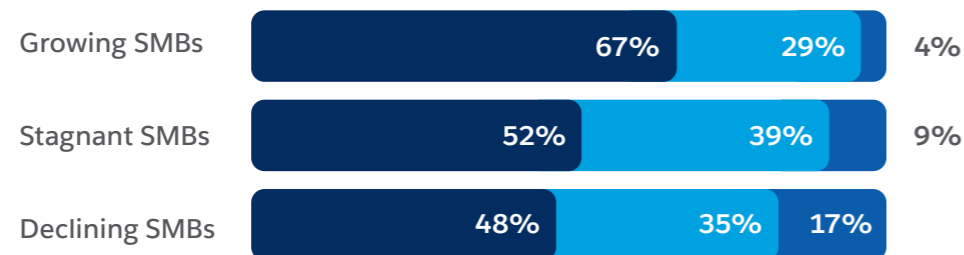
### Delivering Products / Services With Efficiency



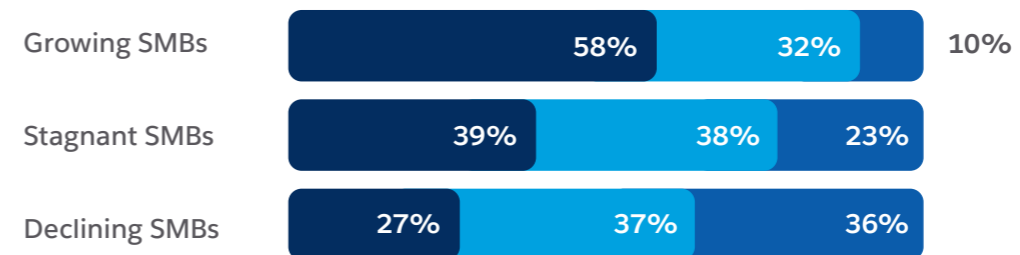
### Accessing Capital



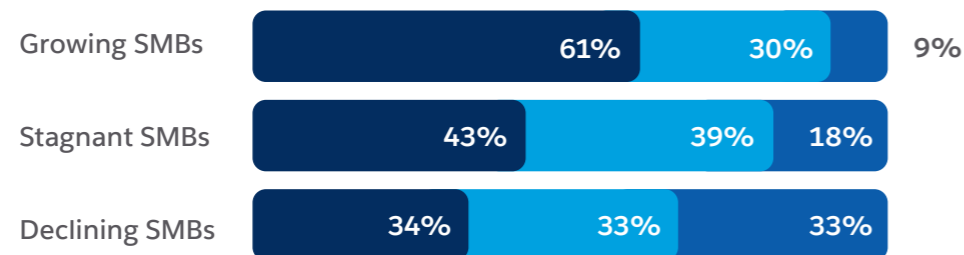
### Building Customer Loyalty



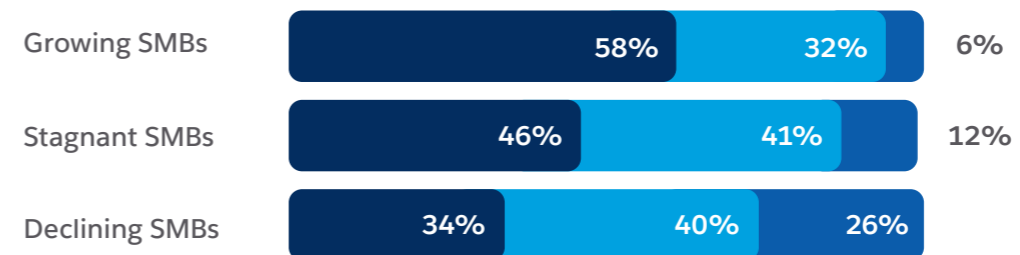
### Attracting And Hiring Top Talent



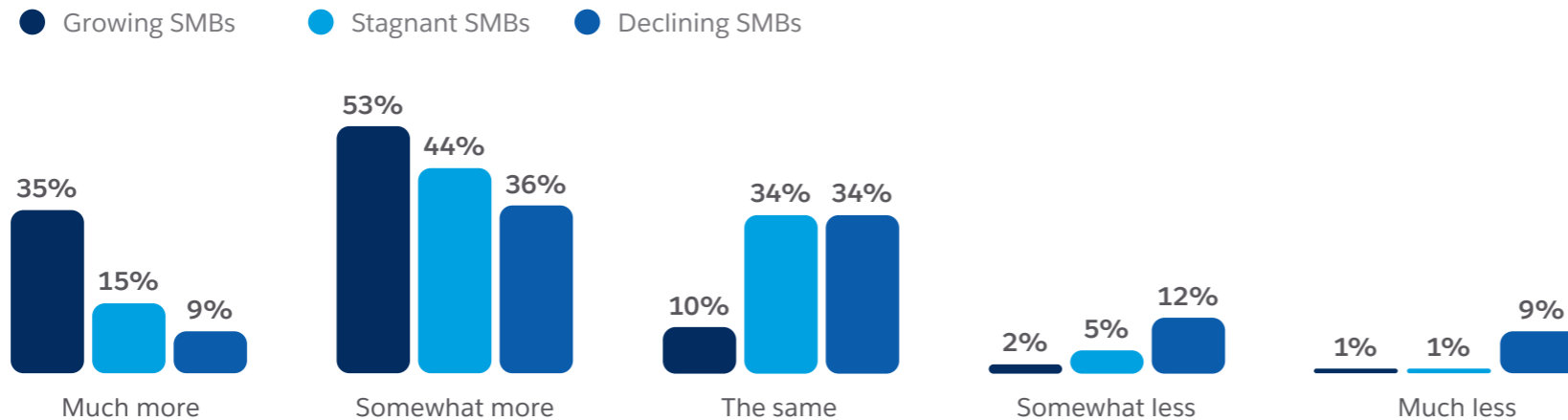
### Keeping Up With Technology Trends



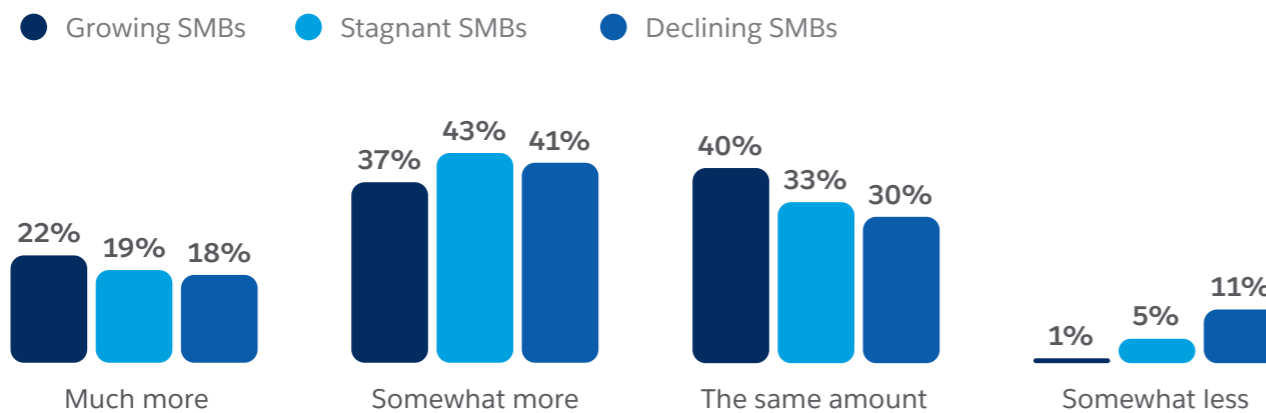
### Adjusting To Market Shifts



## Extent SMBs Invest in Technology Compared to a Year Ago



## SMBs' Plans for Technology Mix Over Next Year

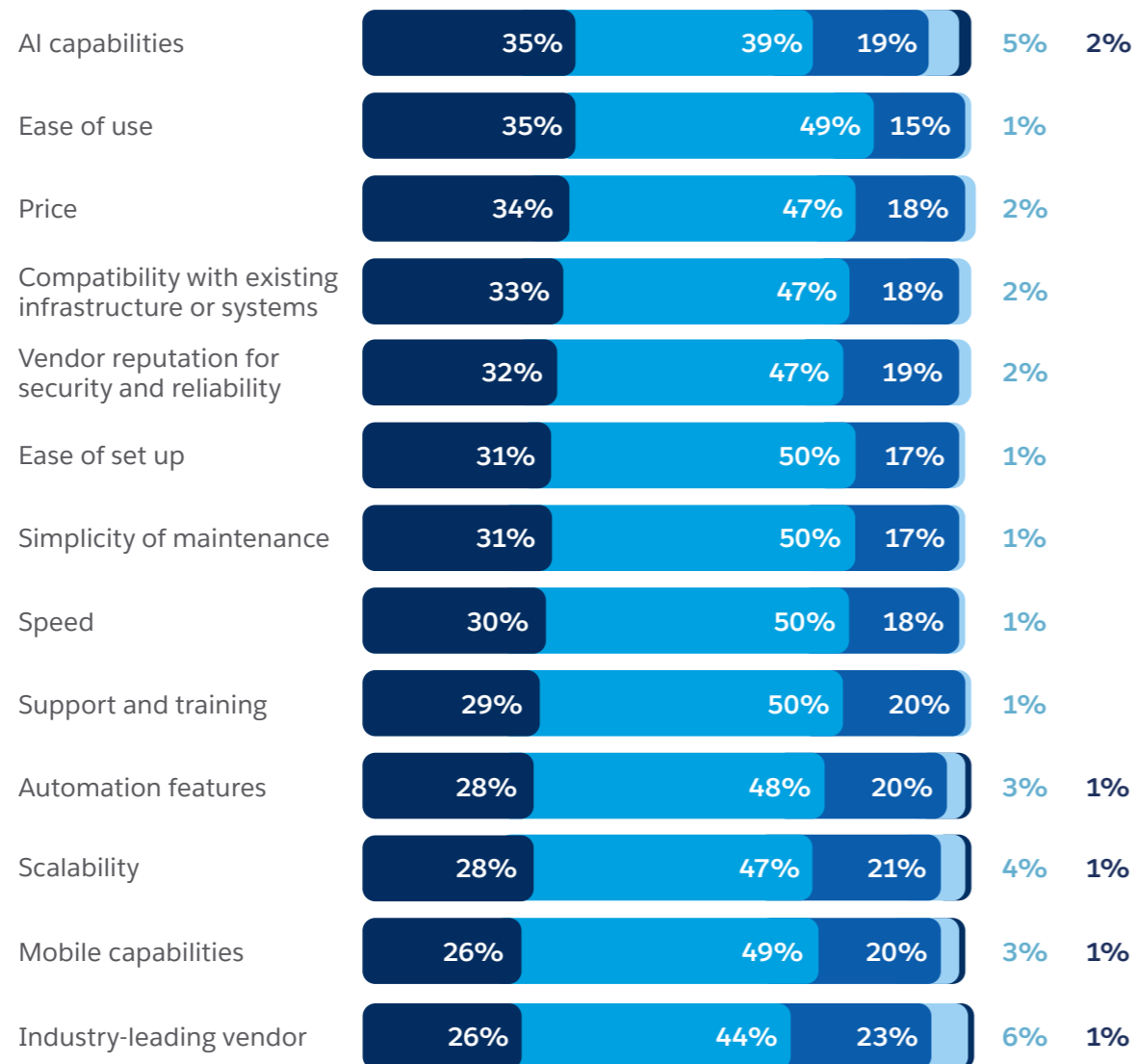


## Percentage of SMBs That Use the Following Technologies



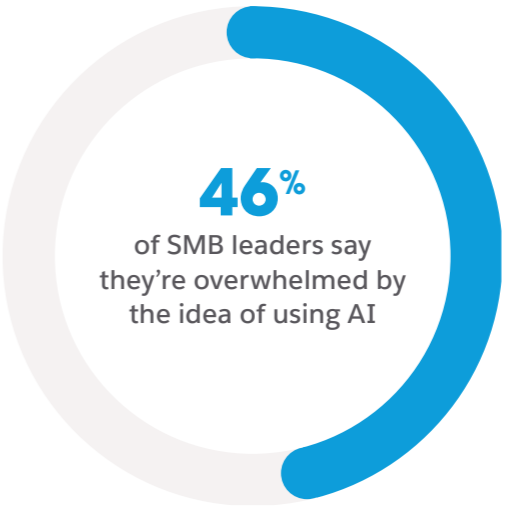
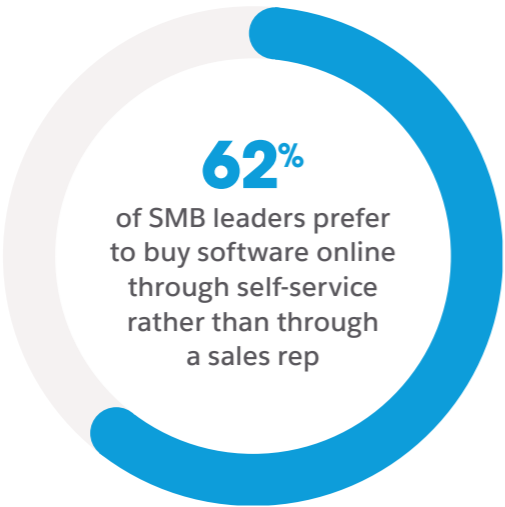
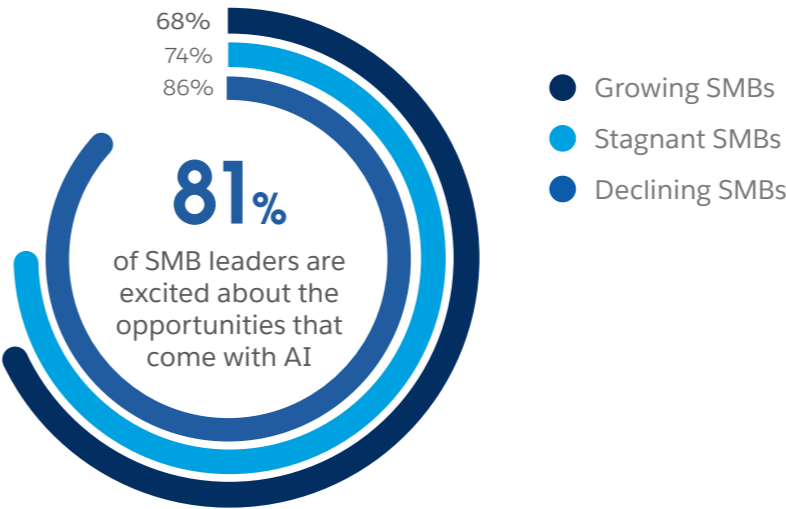
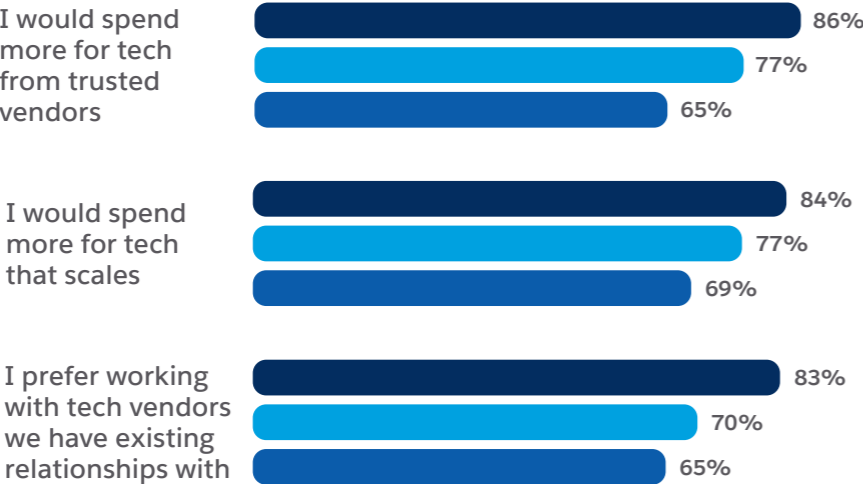
## New Technology Evaluation Factors

● Extremely important   ● Very important   ● Somewhat important   ● Not very important   ● Not at all important



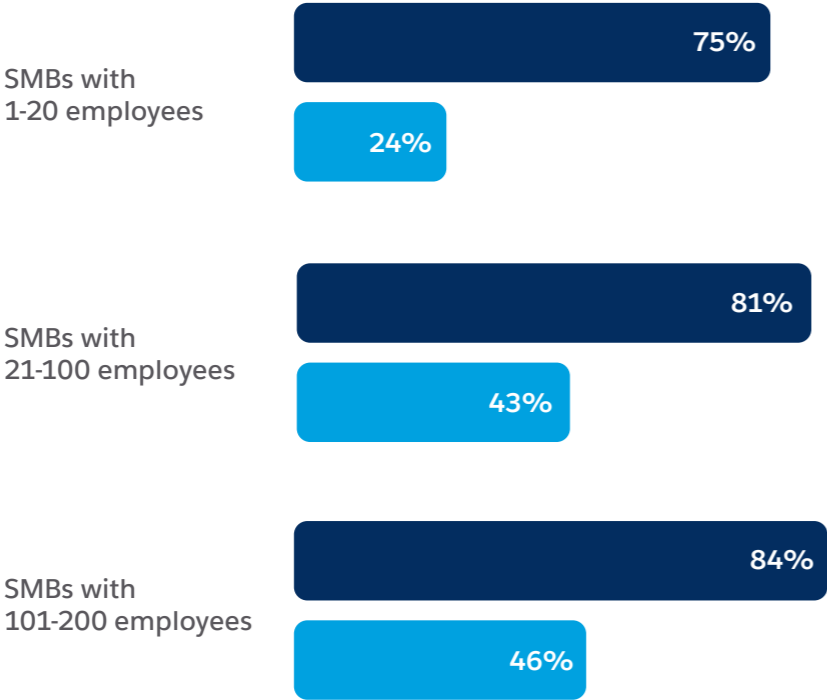
SMB Leaders Who Say the Following

● Growing SMBs ● Stagnant SMBs ● Declining SMBs



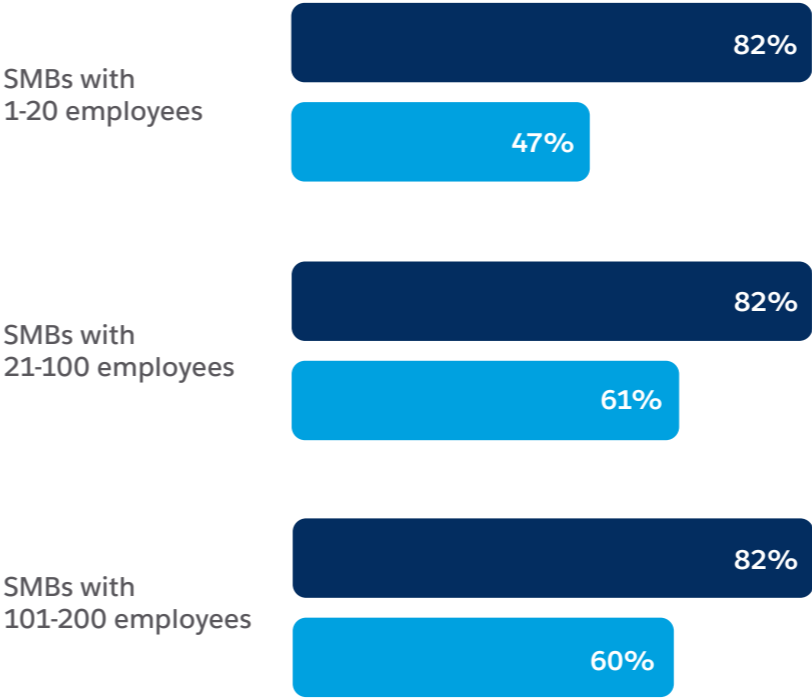
SMB Leaders Who Say Most Business Their Size Use AI

● SMB has AI    ● SMB does not have AI

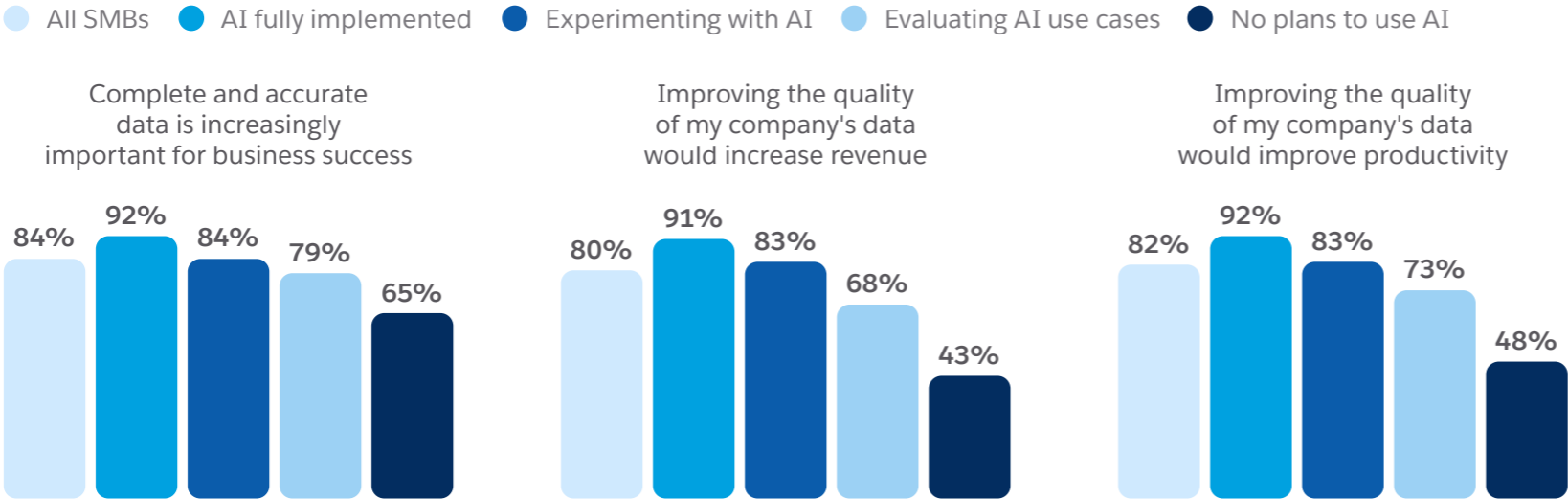


SMB Leaders Who Say Most Businesses Their Size Will Use AI Within 5 Years

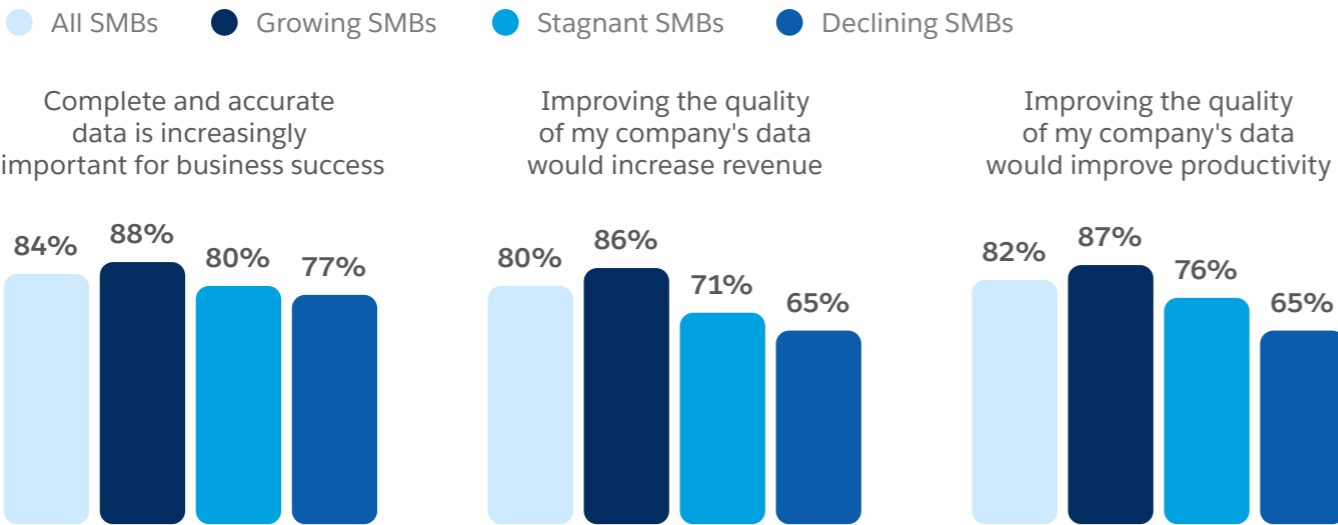
● SMB has AI    ● SMB does not have AI



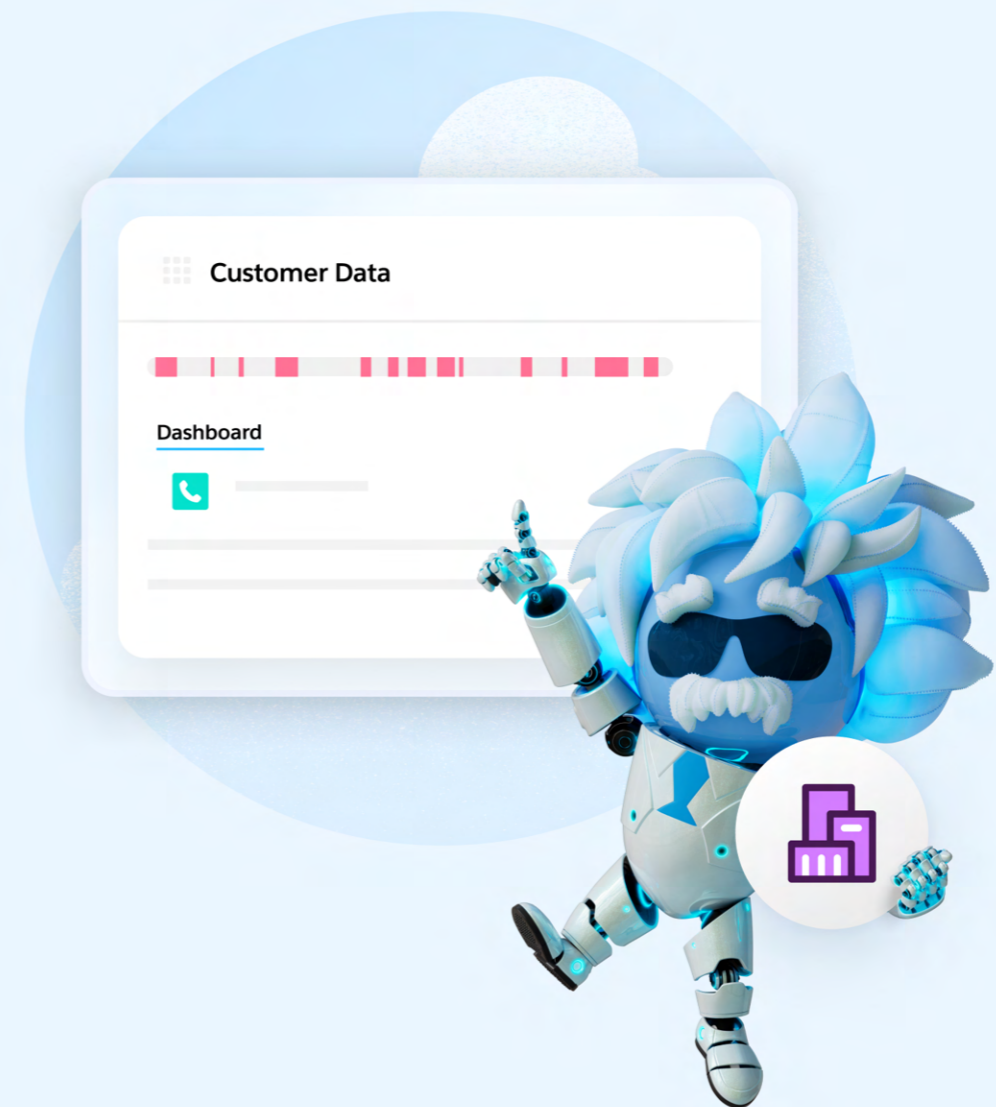
SMB Leaders Who Say the Following



SMBs That Agree With the Following



# Industry Profiles



## Automotive & Energy

### Top Factors for Evaluating New Tech

- 1 AI capabilities
- 2 Ease of use
- 3 Compatibility with existing infrastructure / systems

### Top AI Use Cases<sup>1</sup>

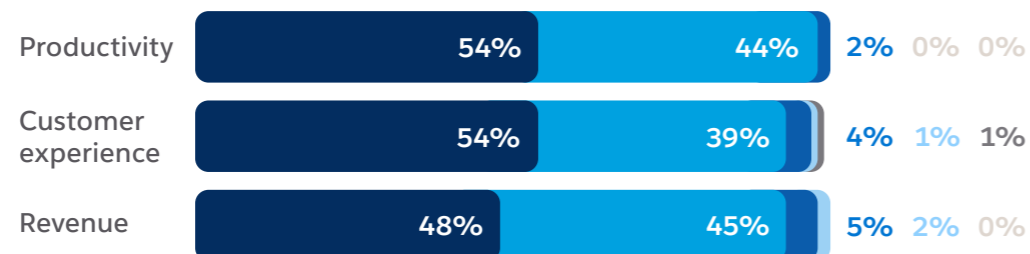
- 1 Automated service chatbots
- 2 Automated campaign insights
- 3 Marketing campaign optimization

### Top AI Concerns<sup>2</sup>

- 1 Security concerns
- 2 Compliance concerns
- 3 Lack of strategy or use cases

### Impact of AI on the Following<sup>2</sup>

- Improves a lot   ● Improves some   ● No difference  
● Worsens some   ● Worsens a lot



<sup>1</sup>Base: Using or evaluating AI

<sup>2</sup>Base: Uses AI

<sup>3</sup>Base: Evaluating or experimenting with AI

### SMB Leaders Who Say the Following



### AI Sentiments



### AI Business Impact Sentiments<sup>2</sup>



## Communications & Media

### Top Factors for Evaluating New Tech

- 1 AI capabilities
- 2 Ease of use
- 3 Price

### Top AI Use Cases<sup>1</sup>

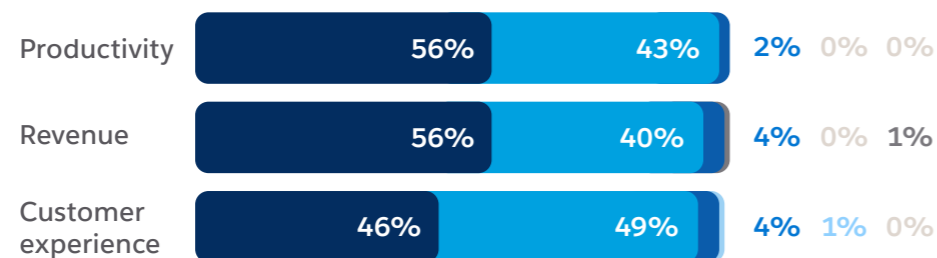
- 1 Marketing campaign optimization
- 2 Automated recommendations for customers
- 3 Predictive forecasting for sales

### Top AI Concerns<sup>2</sup>

- 1 Security concerns
- 2 Insufficient technical expertise
- 3 Customer distrust of AI

### Impact of AI on the Following<sup>2</sup>

- Improves a lot   ● Improves some   ● No difference  
● Worsens some   ● Worsens a lot



<sup>1</sup>Base: Using or evaluating AI

<sup>2</sup>Base: Uses AI

<sup>3</sup>Base: Evaluating or experimenting with AI

### SMB Leaders Who Say the Following



### AI Sentiments



### AI Business Impact Sentiments<sup>2</sup>



## Financial Services

### Top Factors for Evaluating New Tech

- 1 AI capabilities
- 2 Vendor reputation for security / reliability
- 3 Ease of use

### Top AI Use Cases<sup>1</sup>

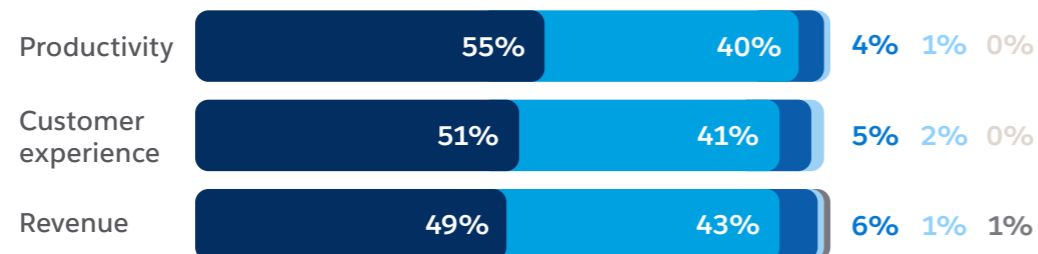
- 1 Automated service chatbots
- 2 Natural language search tools
- 3 Marketing campaign optimization (*tie*)
- 3 Automated recommendations for customers (*tie*)

### Top AI Concerns<sup>2</sup>

- 1 Security concerns
- 2 Difficulty keeping up with AI as it evolves / improves (*tie*)
- 2 Poor integration with existing technology (*tie*)

### Impact of AI on the Following<sup>2</sup>

- Improves a lot
Improves some
No difference
Worsens some
Worsens a lot



<sup>1</sup>Base: Using or evaluating AI

<sup>2</sup>Base: Uses AI

<sup>3</sup>Base: Evaluating or experimenting with AI

### SMB Leaders Who Say the Following



### AI Sentiments



### AI Business Impact Sentiments<sup>2</sup>



 **Healthcare & Life Sciences****Top Factors for Evaluating New Tech**

- 1 AI capabilities
- 2 Mobile capabilities
- 3 Automation features

**Top AI Use Cases<sup>1</sup>**

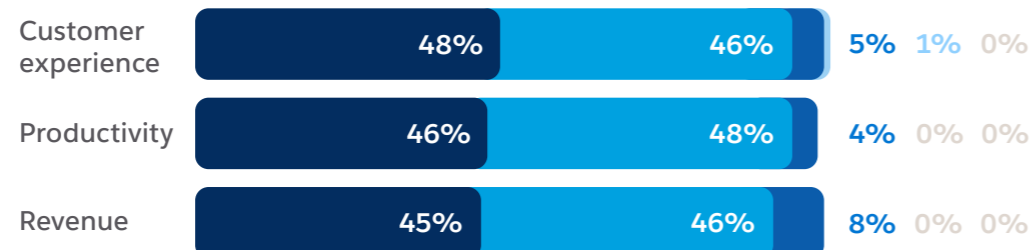
- 1 Automated campaign insights
- 2 Marketing campaign optimization (*tie*)
- 2 Generate new content (*tie*)

**Top AI Concerns<sup>2</sup>**

- 1 Security concerns
- 2 Difficulty choosing the right vendor
- 3 Lack of strategy or use cases

**Impact of AI on the Following<sup>2</sup>**

- Improves a lot   ● Improves some   ● No difference  
● Worsens some   ● Worsens a lot

<sup>1</sup>Base: Using or evaluating AI<sup>2</sup>Base: Uses AI<sup>3</sup>Base: Evaluating or experimenting with AI**SMB Leaders Who Say the Following****AI Sentiments****AI Business Impact Sentiments<sup>2</sup>**

## Manufacturing

### Top Factors for Evaluating New Tech

- 1 AI capabilities
- 2 Price
- 3 Compatibility with existing infrastructure / systems

### Top AI Use Cases<sup>1</sup>

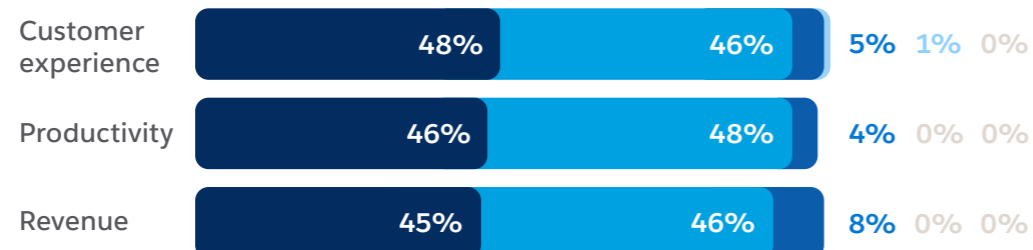
- 1 Generate new content
- 2 Marketing campaign optimization (*tie*)
- 2 Predictive forecasting for sales (*tie*)

### Top AI Concerns<sup>2</sup>

- 1 Security concerns
- 2 Lack of strategy or use cases
- 3 Compliance concerns

### Impact of AI on the Following<sup>2</sup>

- Improves a lot
● Improves some
● No difference
● Worsens some
● Worsens a lot



<sup>1</sup>Base: Using or evaluating AI

<sup>2</sup>Base: Uses AI

<sup>3</sup>Base: Evaluating or experimenting with AI

### SMB Leaders Who Say the Following



### AI Sentiments



### AI Business Impact Sentiments<sup>2</sup>



 **Retail & Consumer Goods****Top Factors for Evaluating New Tech**

- 1 AI capabilities
- 2 Ease of use
- 3 Speed

**Top AI Use Cases<sup>1</sup>**

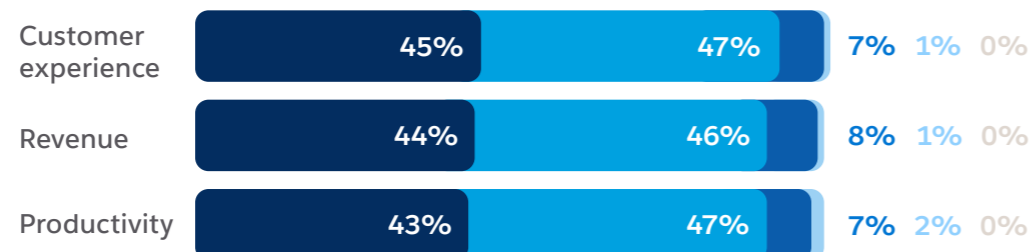
- 1 Automated recommendations for customers (*tie*)
- 1 Marketing campaign optimization (*tie*)
- 2 Predictive forecasting for sales

**Top AI Concerns<sup>2</sup>**

- 1 Security concerns
- 2 Insufficient technical expertise
- 3 Compliance concerns

**Impact of AI on the Following<sup>2</sup>**

- Improves a lot   ● Improves some   ● No difference  
● Worsens some   ● Worsens a lot

<sup>1</sup>Base: Using or evaluating AI<sup>2</sup>Base: Uses AI<sup>3</sup>Base: Evaluating or experimenting with AI**SMB Leaders Who Say the Following****AI Sentiments****AI Business Impact Sentiments<sup>2</sup>**



Technology

Top Factors for Evaluating New Tech

- 1 AI capabilities
- 2 Price
- 3 Ease of use

Top AI Use Cases<sup>1</sup>

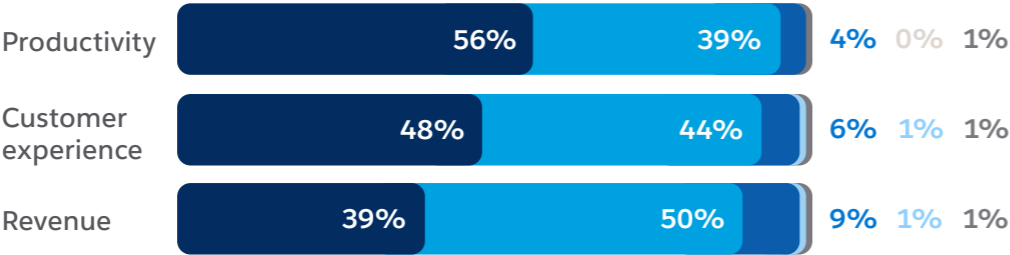
- 1 Automated recommendations for customers
- 2 Natural language search tools
- 3 Automated service chatbots

Top AI Concerns<sup>2</sup>

- 1 Security concerns
- 2 Inaccurate outputs
- 3 Compliance concerns

Impact of AI on the Following<sup>2</sup>

- Improves a lot
- Improves some
- No difference
- Worsens some
- Worsens a lot



<sup>1</sup>Base: Using or evaluating AI  
<sup>2</sup>Base: Uses AI  
<sup>3</sup>Base: Evaluating or experimenting with AI

SMB Leaders Who Say the Following



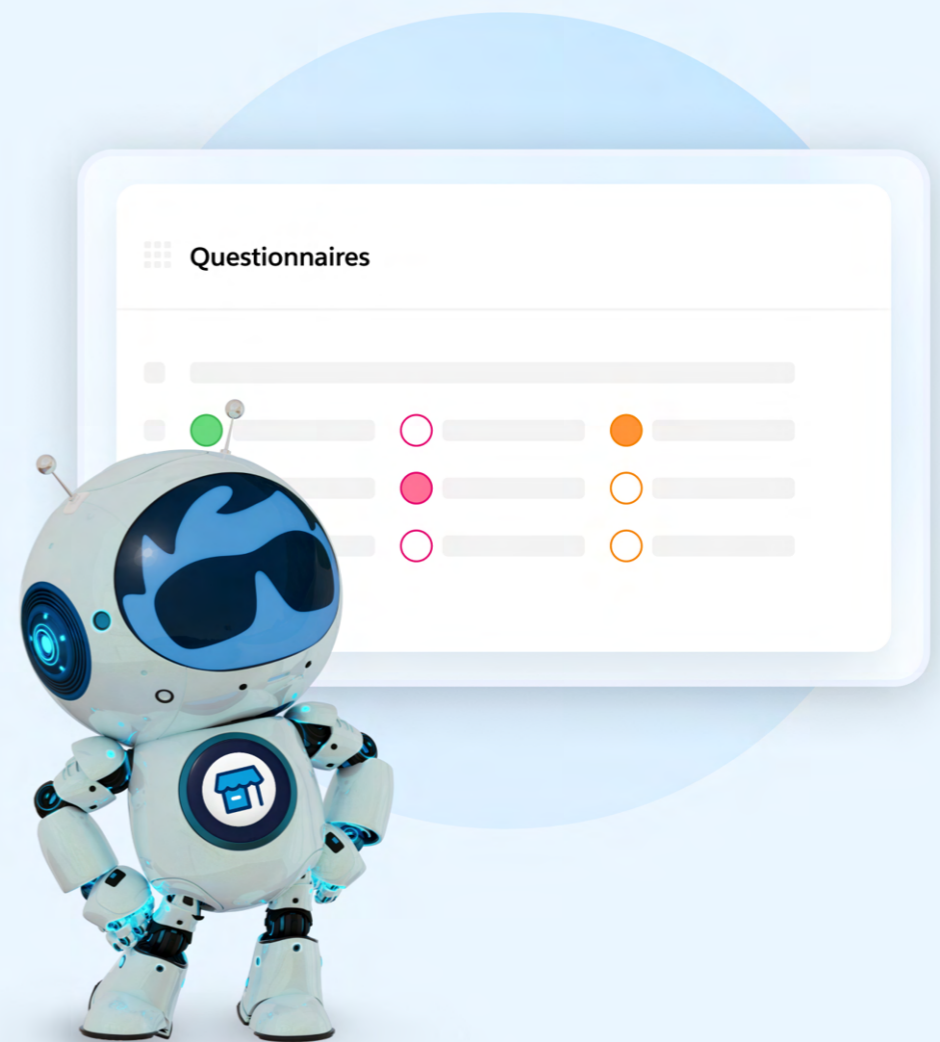
AI Sentiments



AI Business Impact Sentiments<sup>2</sup>



# Survey Demographics



# Survey Demographics

## Country

Australia .....	N=150, 4%
Belgium .....	N=50, 1%
Brazil .....	N=200, 6%
Canada .....	N=150, 4%
France .....	N=200, 6%
Germany .....	N=200, 6%
India .....	N=200, 6%
Ireland .....	N=50, 1%
Italy .....	N=150, 4%
Japan .....	N=200, 6%
Mexico .....	N=200, 6%
Netherlands .....	N=100, 3%
New Zealand .....	N=50, 1%
Nordics (DK, FI, NO, SE) .....	N=100, 3%
Portugal .....	N=75, 2%
Singapore .....	N=50, 1%
South Africa .....	N=150, 4%
South Korea .....	N=150, 3%
Spain .....	N=150, 4%
Switzerland .....	N=50, 1%
United Arab Emirates .....	N=75, 2%
United Kingdom .....	N=200, 6%
United States .....	N=500, 15%

## Industry

Agriculture .....	N=99, 3%
Architecture, engineering, and construction .....	N=149, 4%
Automotive .....	N=151, 5%
Communications .....	N=62, 2%
Consumer goods .....	N=251, 7%
Energy and utilities .....	N=129, 4%
Financial services .....	N=304, 9%
Healthcare .....	N=161, 5%
Life sciences and biotechnology .....	N=112, 3%
Manufacturing .....	N=277, 8%
Media and entertainment .....	N=126, 4%
Professional and business services .....	N=304, 9%
Retail .....	N=566, 17%
Supply chain and logistics .....	N=76, 2%
Technology .....	N=210, 6%
Travel and hospitality .....	N=194, 6%
Other .....	N=179, 5%

## Role Within Company

Business Owner .....	N=1428, 43%
Senior executive .....	N=692, 21%
Director or equivalent .....	N=1230, 37%

## Company Size

1 to 20 employees .....	N=1141, 34%
21 to 100 employees .....	N=1377, 41%
101 to 200 employees .....	N=832, 25%





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