

# MÜNCHNER KREIS FUTURE STUDY

## Special survey on the coronavirus pandemic

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Slides with key findings

April 2020

# Methodology in brief

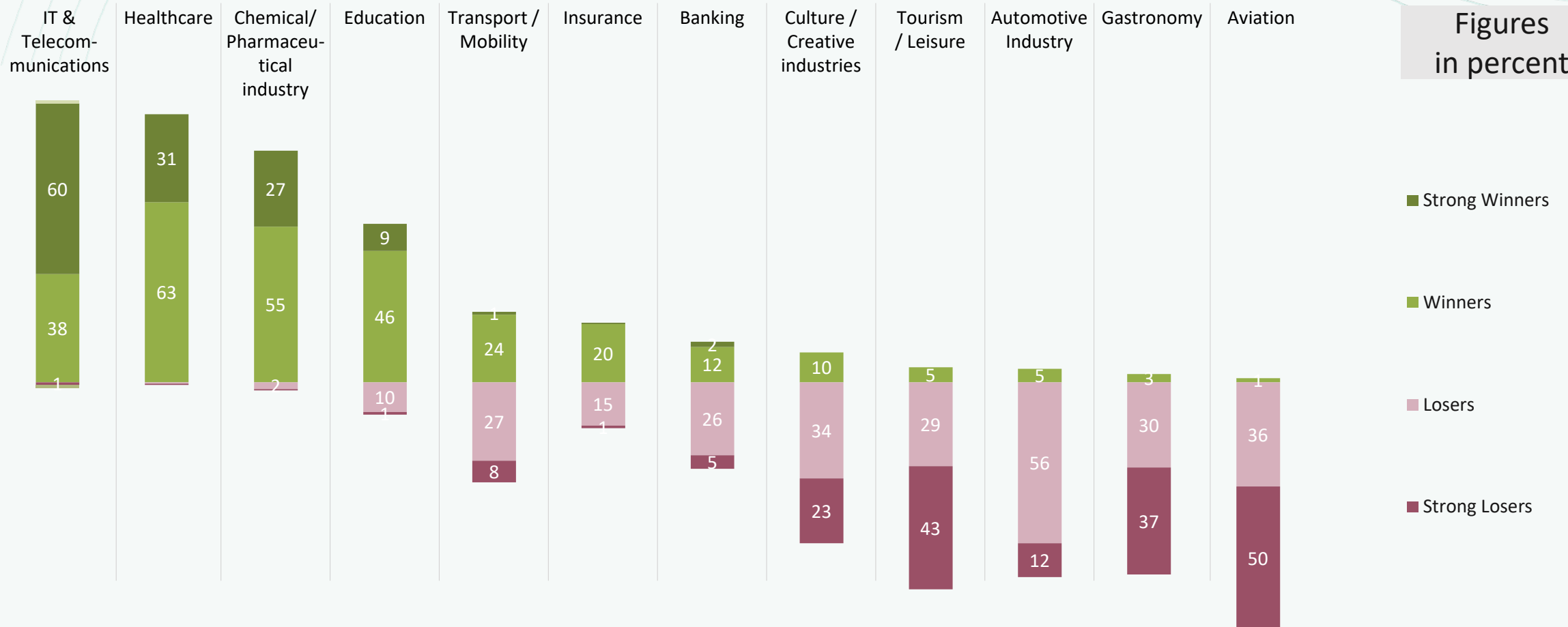
*Special survey on the coronavirus pandemic (MÜNCHNER KREIS Future Study Part VIII.01)*

- Survey period: 15 April – 24 April 2020
- Online survey
- German experts on digitalization, technology development and AI technologies
- Number of respondents: n=211

# Part A: Questions about the Economy in general

# Industries – winners and losers

In your opinion, which of the following industries will be the long-term winners or losers of the COVID-19 pandemic?



Question A01: In your opinion, which of the following industries will be the long-term winners or losers of the COVID-19 pandemic?  
 Basis: German experts; n=211; figures in percent; percent missing up to 100=not specified / pos. 3 on a 5-point scale

# Changes in your own organization

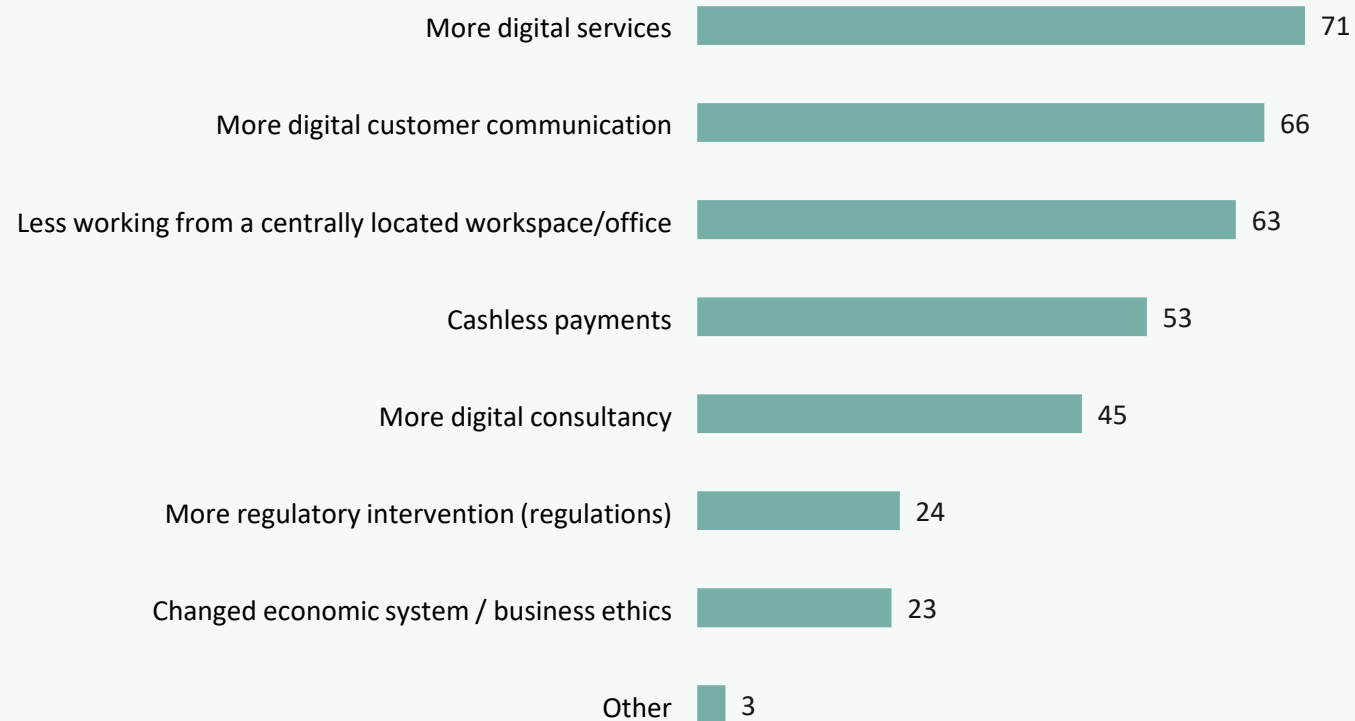
*Where do you currently observe – triggered by the COVID-19 pandemic – the biggest changes in your organization?*



Figures  
in percent

# Long-term implications of the COVID-19 pandemic

*Which of the following economic developments will persist after the COVID-19 pandemic?*



Figures  
in percent

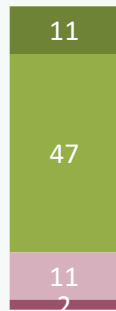
# Impact of the coronavirus pandemic on AI technologies

How will the coronavirus pandemic affect the importance and development of AI technologies?

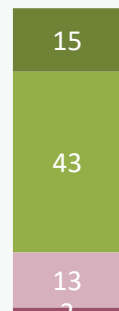
Increasing use of AI technology in the healthcare sector



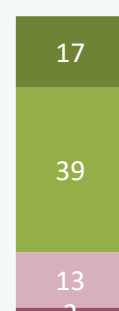
Increasing use of AI technology in professional contexts



Higher degree of automation in industry and manufacturing



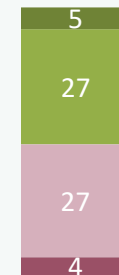
Increased research and development in AI technologies



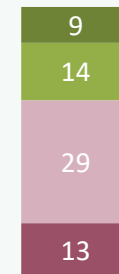
Emergence of new AI-based business models



Increasing use of AI technology in private lives



Increased investments in Quantum Computing

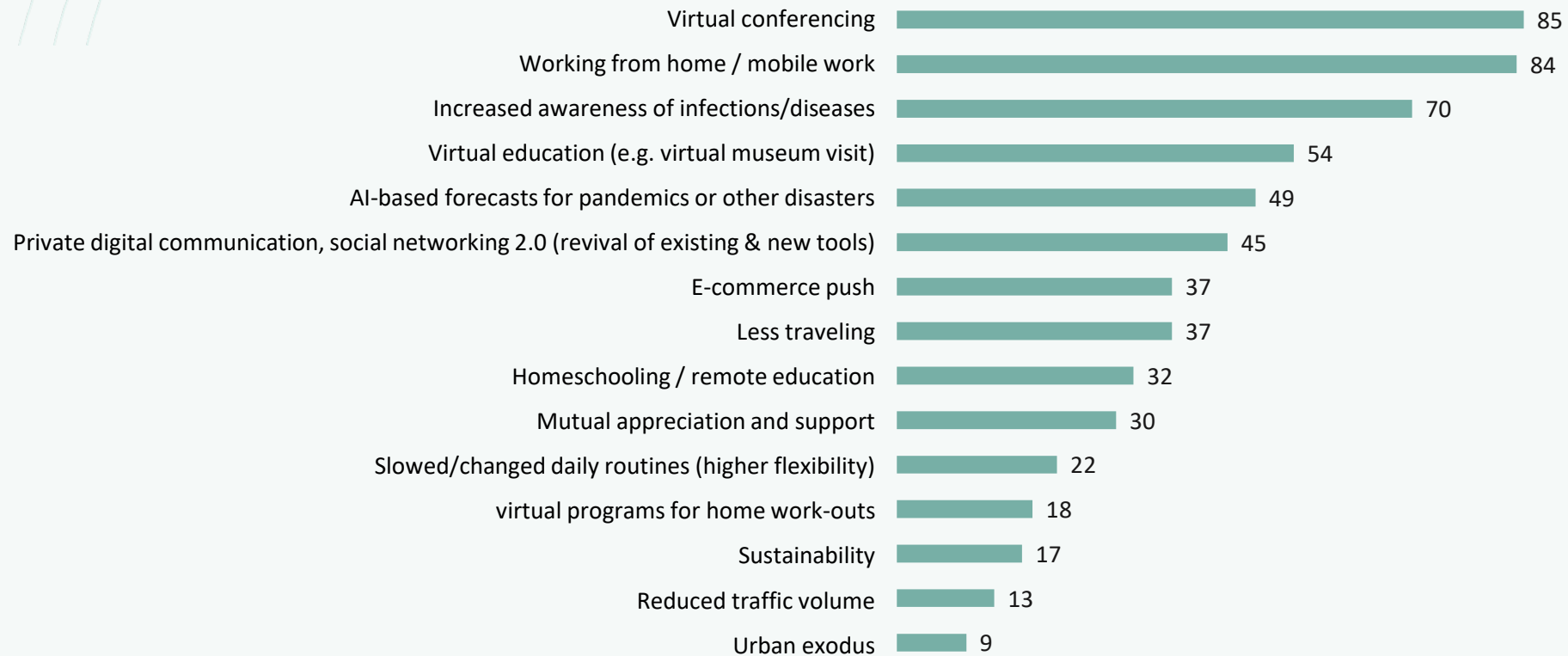


Figures in percent

- Strongly agree
- Slightly Agree
- Slightly Disagree
- Strongly disagree

# Corona-induced Trends

*Which of the following trends will persist after the coronavirus pandemic?*



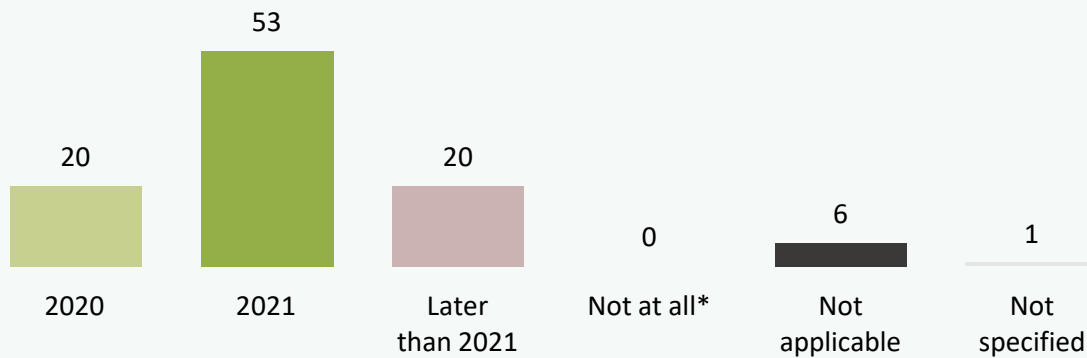
Figures  
in percent



# Overcoming the coronavirus pandemic

When do you expect your organization to overcome the consequences of the coronavirus pandemic?

Figures  
in percent



# PART B: Key issues for the future

# AI related issues for the future

How would you assess the impact of the coronavirus pandemic on the development of the following topics related to AI technologies?

Figures  
in percent

Data-driven development of competencies in companies



Societal acceptance of AI technology



Use of language assistances (chat bots)



Increased importance of human competencies



New companies with high AI usage



Extensive use of AI technologies in education



Intensified ware for talent (in the workplace)



AI technology is essential for competitiveness



Use of AI for work organization



New AI-based job profiles, e.g. AI architect



Elimination of current industry boundaries



Use of AI-based digital personal assistants



Creation of a technical control authority for AI products



Transparency in work performance



Changing human abilities and skills through AI



Emergence of an AI generation



■ Accelerating strongly

■ Accelerating

■ slowing

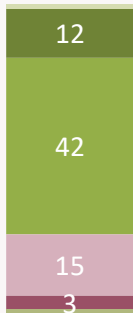
■ Slowing strongly



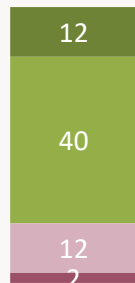
# Dimensions

How strong an impact will the coronavirus pandemic have on the following five dimensions by 2030?

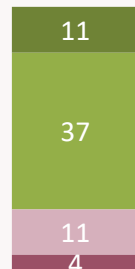
Changing human relationships (interaction between individuals)



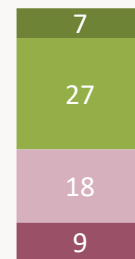
Regulatory parameters (e.g. laws)



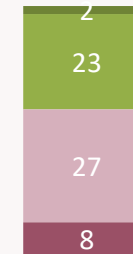
Sense of purpose for the individual (focus on oneself)



Consensus in society (individuals as part of a societal framework)



Evaluation processes (appraisal/ performance measurement)



Figures in percent

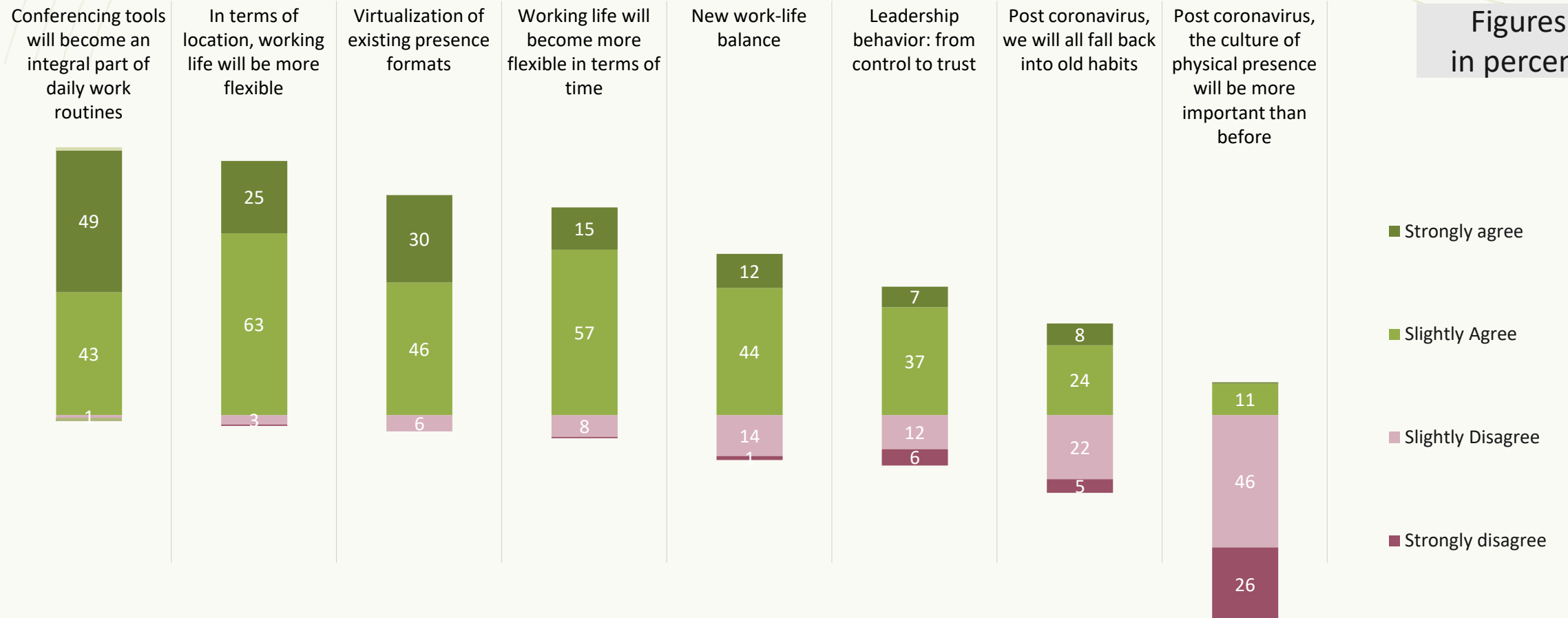
- Very strong
- strong
- weak
- very weak



# PART C. New Work

# Statements on “New work”

To what extent do you agree with the following statements about the future of work in the context of long-term changes brought about by the COVID-19 pandemic?



Figures in percent

Question C01: To what extent do you agree with the following statements about the future of work in the context of long-term changes brought about by the coronavirus pandemic?

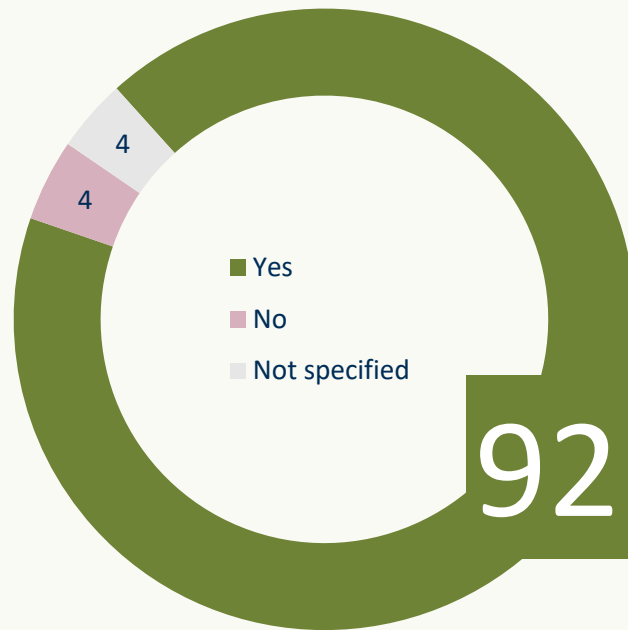
Basis: German experts; n=211; figures in percent; gap to 100% = not specified / pos. 3 on a 5-point scale

# Digital transformation

*Currently, many companies can only offer their services digitally.*

*Do you think that this crisis will lead to the acceleration the digital transformation of companies?*

Figures  
in percent



92

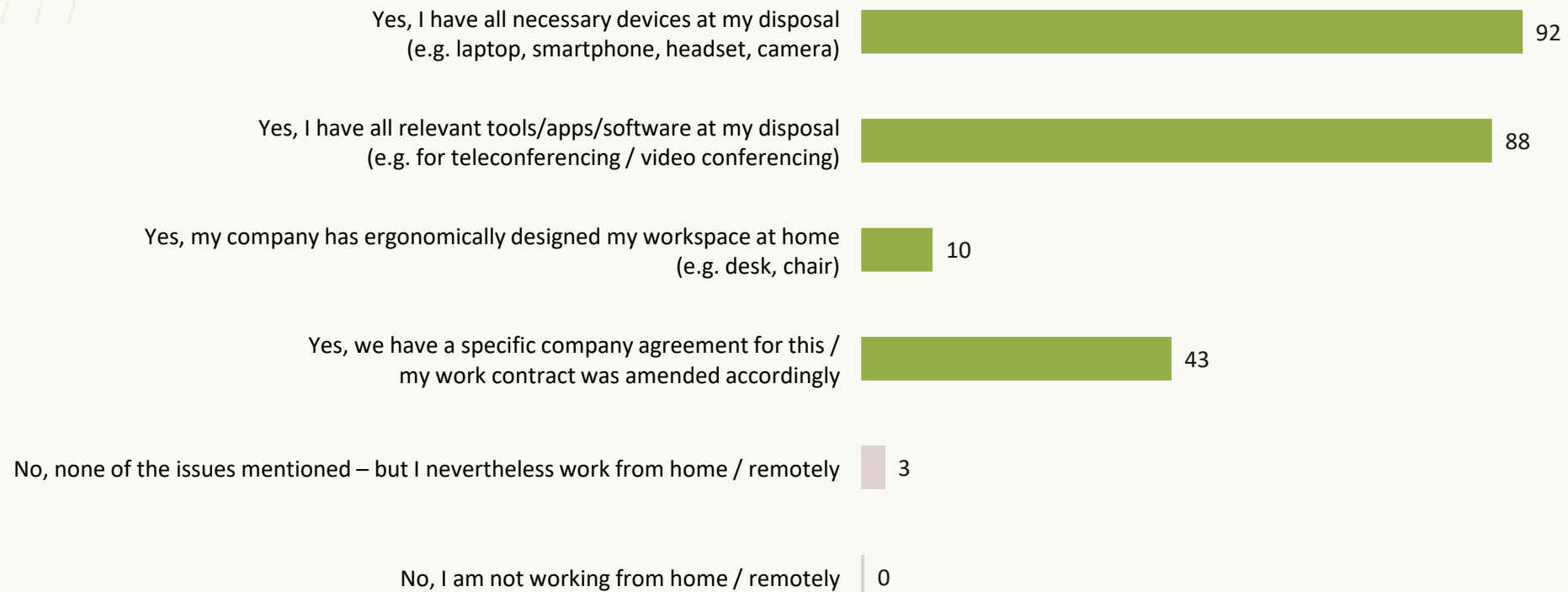
The COVID-19 crisis accelerates the digital transformation of companies!

Question C02: Currently, many companies can only offer their services digitally. Do you think that this crisis will lead to the acceleration the digital transformation of companies?

Basis: German experts; n=211; figures in percent; one answer possible

# Working from home / remotely

Has your company equipped you for working from home / remotely?



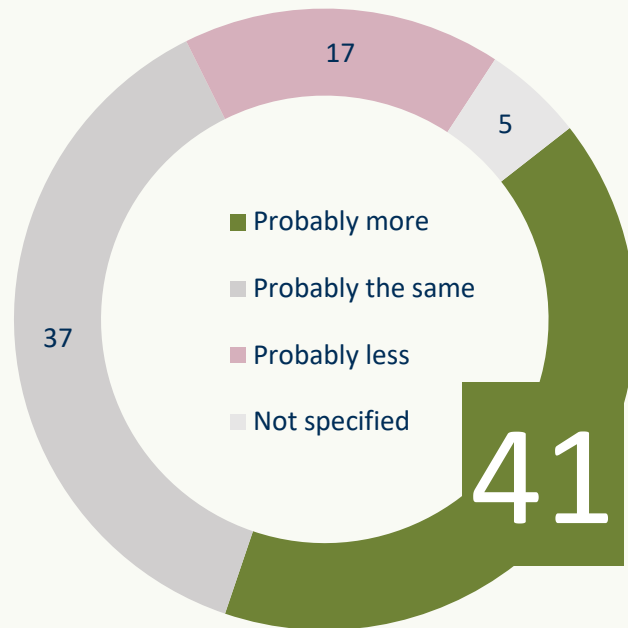
Figures  
in percent



# Working more/less

*Do you think that people working from home / remotely tend to work more or less than in the office?*

Figures  
in percent

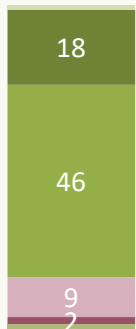


People work more from home / remotely

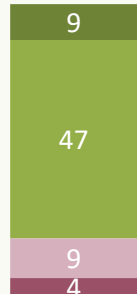
# Working from home / remotely in the context of AI

Increased working from home / remotely leads to...

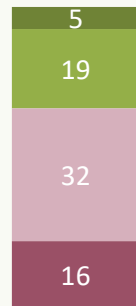
...Changing role of management



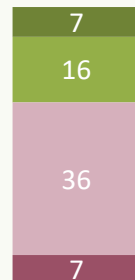
...Higher acceptance of the use of digital assistants



...AI technologies taking over certain administrative tasks



...Greater transparency in work performance



...Work team composition through AI platforms



...HR development through AI



Figures in percent

- Strongly agree
- Slightly Agree
- Slightly Disagree
- Strongly disagree

# Part X Conclusions

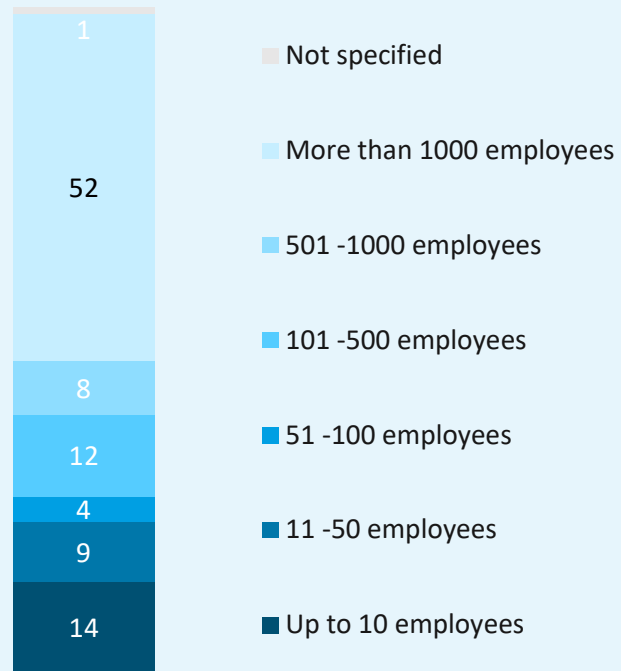
# Size of the organization / View into the future

What is the size of the organization you are working for (number of employees in Germany)?

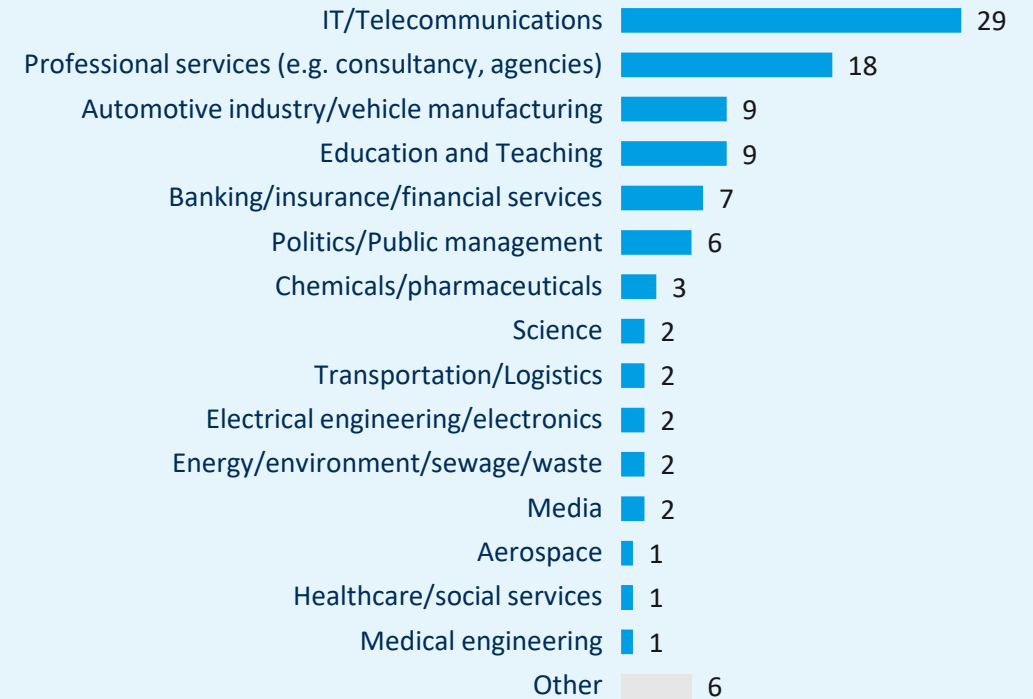
In which sector you primarily working?

Figures  
in percent

## Size of your organization



## Your sector



Question X01: What is the size of the organization you are working for (number of employees in Germany)?  
 Question X02: In which sector you primarily working? [Sectors accounting for five percent and higher]  
 Basis: German experts; n=211; figures in percent



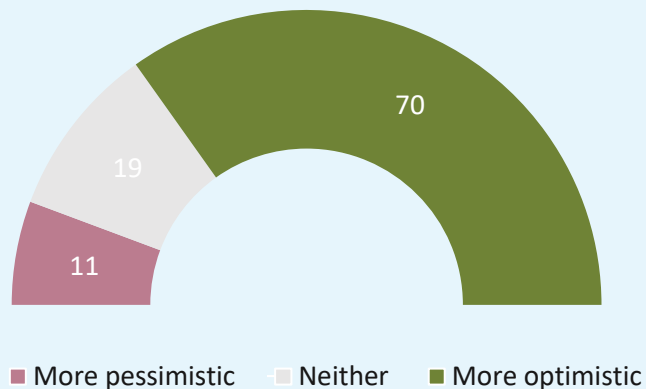
# Influence of the Pandemic on the future in the context of AI technologies

Generally, how do you view the world's future over the next 10 years?

Would you like to share any other comments on the coronavirus pandemic and its impact on the future in the context of AI technologies?

Figures  
in percent

## View into the future



“ The coronavirus pandemic will give KI a significant boost, increase acceptance and accelerate its use.

“ Basically, I assume that, as with previous crises, we will all fall quickly back into old behavioral patterns.

“ AI might be helpful for simulating scenarios for the future (e.g. exit from the coronavirus pandemic)