

 MORNING CONSULT<sup>®</sup>



# IBM GLOBAL AI ADOPTION INDEX – ENTERPRISE REPORT

NOVEMBER 8 – 23, 2023

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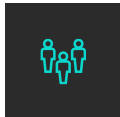
## METHODOLOGY & AUDIENCE

### REPRESENTATIVE SAMPLE OF IT PROFESSIONALS IN MARKET



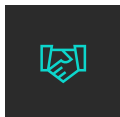
- 2,342 IT Professionals at enterprises (organizations with > 1,000 employees)
  - This study was conducted in Australia, Canada, China, France, Germany, India, Italy, Japan, Singapore, South Korea, Spain, UAE, UK, US, and LATAM (Brazil, Mexico, Peru, Argentina, Chile, Colombia)
  - Market sample sizes range from 92 to 316
- To qualify for this audience, participants must be employed full-time, work at companies with more than 1,000 employees, work in a manager or higher level role, and have at least some knowledge about how IT operates and is used by their company.
- Survey conducted online through MC's proprietary network of online providers.

### COMPANY SIZE BREAKDOWN



- 50% of respondents came from firms with 1,001 to 5,000 employees
- 50% of respondents came from firms with more than 5,000 employees

### RESPONDENTS REPRESENTED A MIX OF SENIORITY



- All respondents were required to have significant insight or input into their firm's IT decision-making
- 20% of the sample was at a VP level or above (including CIOs, etc.)
- The remainder of the sample represented a mix of directors and senior manager-level employees

## Key Findings

- 1. AI adoption and exploration, covering both general AI and generative AI, continues to be a substantial focus for enterprises globally one year after the release of GPT-3.** Many of those large companies already exploring or deploying AI have accelerated their roll-out of AI in the past two years, with ‘Research and Development,’ ‘Workforce Upskilling,’ and ‘Building Proprietary AI Solutions’ emerging as top investment priorities. In the dynamic landscape of generative AI, enterprises tend to utilize in-house technology over open-source technology.
- 2. As enterprises enter the AI landscape, many have already established some form of an AI strategy.** This adoption is fueled by factors such as increased accessibility, cost-cutting through automation, and growing AI integration in business apps. Globally, Enterprise IT Professionals highlight accessible tools, (%, the increased prevalence of AI related skillsets, and AI-tailored solutions as key industry changes. However, challenges like limited knowledge, too much data complexity, and ethical concerns hinder adoption. In the context of generative AI, additional obstacles emerge, including data privacy and trust/transparency concerns.
- 3. AI is contributing to multiple facets of organizational operations at enterprises, with IT process automation and security and threat detection being the most popular applications.** IT Professionals are at the forefront of AI usage at their enterprises and note the importance of being able to build and run AI projects wherever their data resides. Confidence in these capabilities is high, as most IT Professionals are confident that their enterprise has the right tools to find data across the business.
- 4. Trustworthy and responsible AI practices are of utmost importance to both consumers and enterprises at various stages of AI implementation.** In fact, most large organizations already exploring or deploying AI are actively taking steps like safeguarding data privacy through the entire lifecycle to ensure that. Insufficient expertise for reliable AI management and development and lack of an AI strategy are among the biggest barriers enterprises face as they strive to develop trustworthy AI.
- 5. AI has a predominantly positive influence on the workforce.** Numerous enterprises are investing in AI training, and IT Professionals note employee enthusiasm for new AI and automation tools. Additionally, AI plays a crucial role in addressing labor and skills shortages by equipping large companies with the tools to streamline tasks and automate self-service interactions.

AGENDA

AI ADOPTION & INVESTMENTS

DRIVERS & BARRIERS OF AI

CURRENT USES OF AI

AI ETHICS AND RESPONSIBILITY

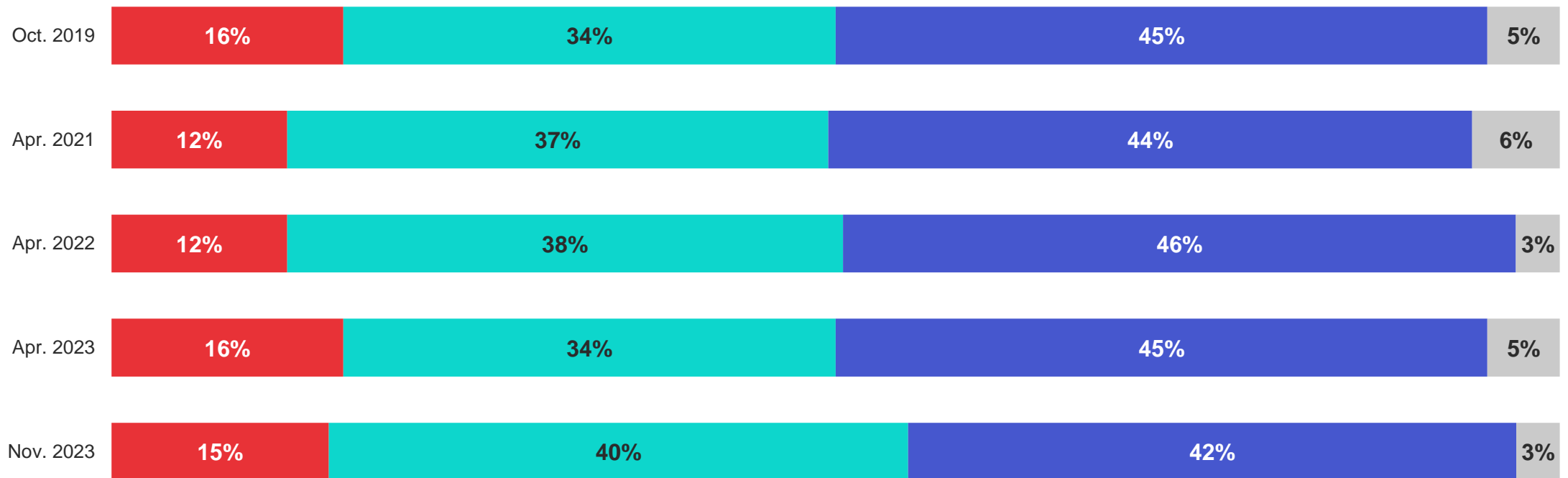
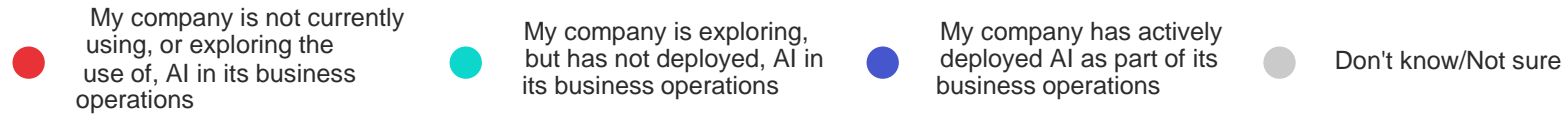
AI'S IMPACT ON EMPLOYEES



AI ADOPTION & INVESTMENTS

Over the past four years, AI adoption at enterprises has remained steady, with 42% of IT Professionals reporting AI deploying and an additional 40% reporting active exploration in November 2023.

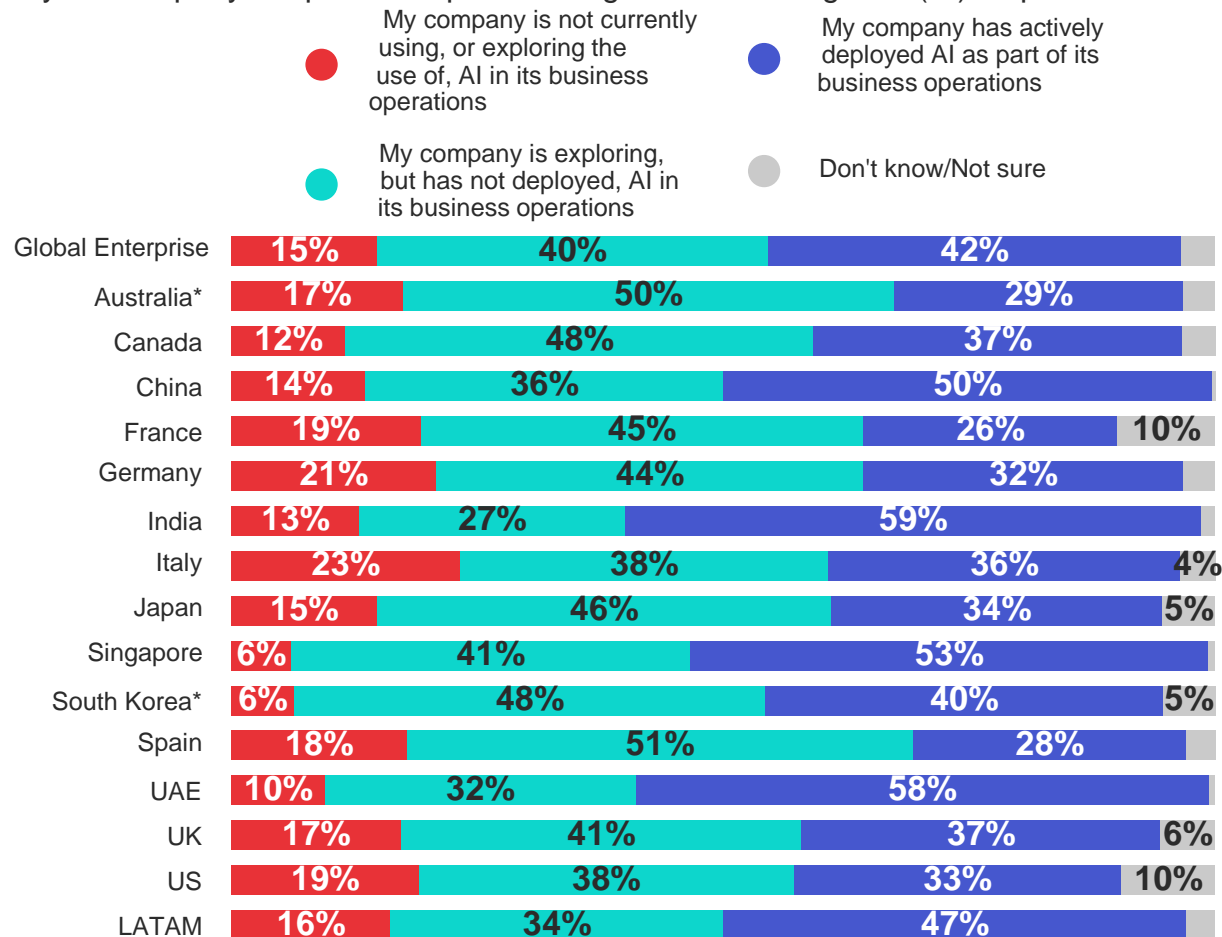
Has your company adopted or explored using Artificial Intelligence (AI) as part of its business operations and digital transformation?



AI ADOPTION & INVESTMENTS

Although there is a similar global AI Adoption trend from April 2023, there are some country specific outliers worth noting.

Has your company adopted or explored using Artificial Intelligence (AI) as part of its business operations and digital transformation?



Increases in AI Adoption

The UAE, UK, and LATAM all saw an uptick in enterprises deploying AI in November 2023. (UAE: 48% Apr. '23, 58% Nov. '23) (UK: 29% Apr. '23, 37% Nov. '23) (LATAM: 40% Apr. '23, 47% Nov. '23).

Decreases in AI Adoption

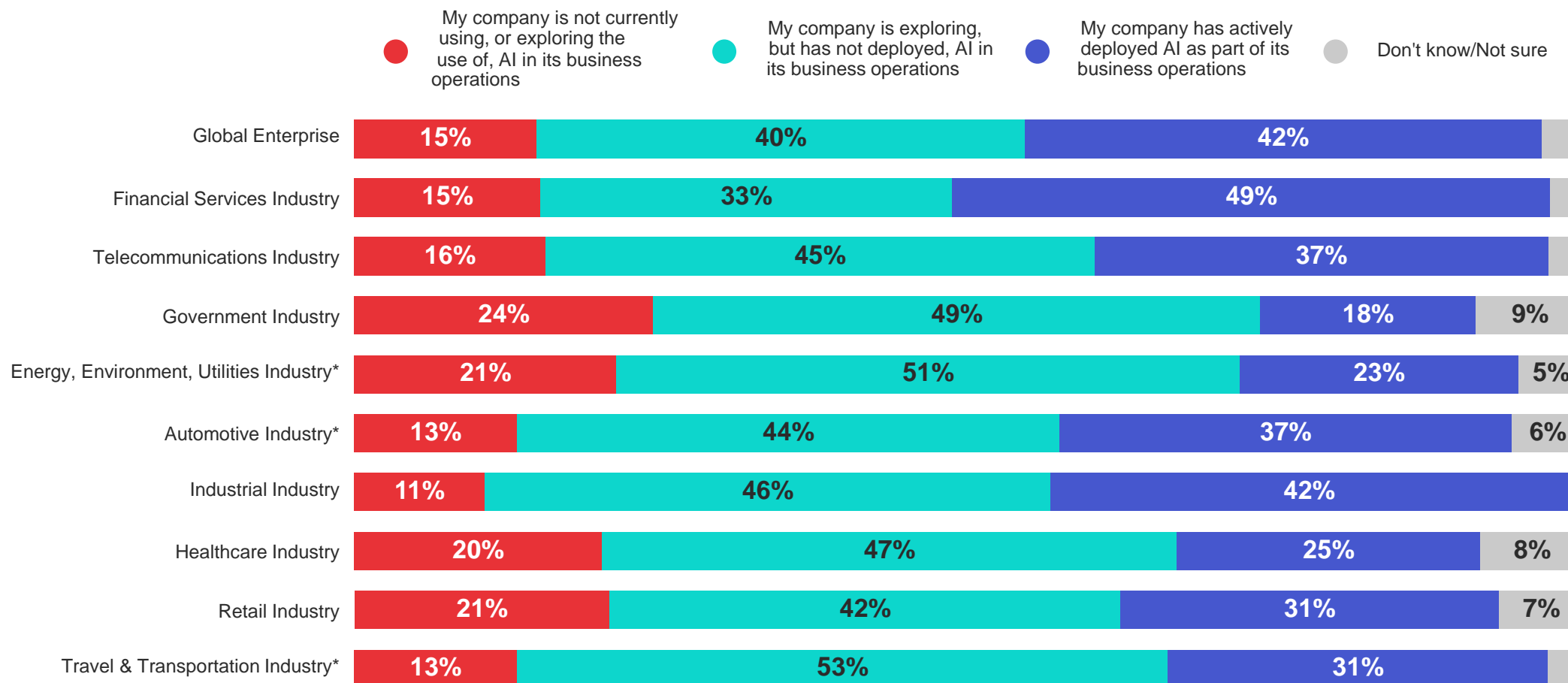
China (66% Apr. '23 to 50% Nov. '23) and Japan (49% Apr. '23 to 34% Nov. '23) both experienced drops in AI deployment, with larger proportions of IT Professionals reporting AI exploration (China: 19% Apr. '23, 36% Nov. '23) (Japan: 27% Apr. '23, 46% Nov. '23).

AI deployment in Italy dropped from 52% in April 2023 to 36% in November 2023. Italian IT Professionals were more likely to report in the second half of the year that their business is not currently using or exploring AI (13% Apr. '23, 23% Nov. '23).

AI ADOPTION & INVESTMENTS

Enterprises within the financial services are most likely to be using AI, with nearly half of IT Professionals in that industry reporting their enterprise has actively deployed AI.

Has your company adopted or explored using Artificial Intelligence (AI) as part of its business operations and digital transformation?

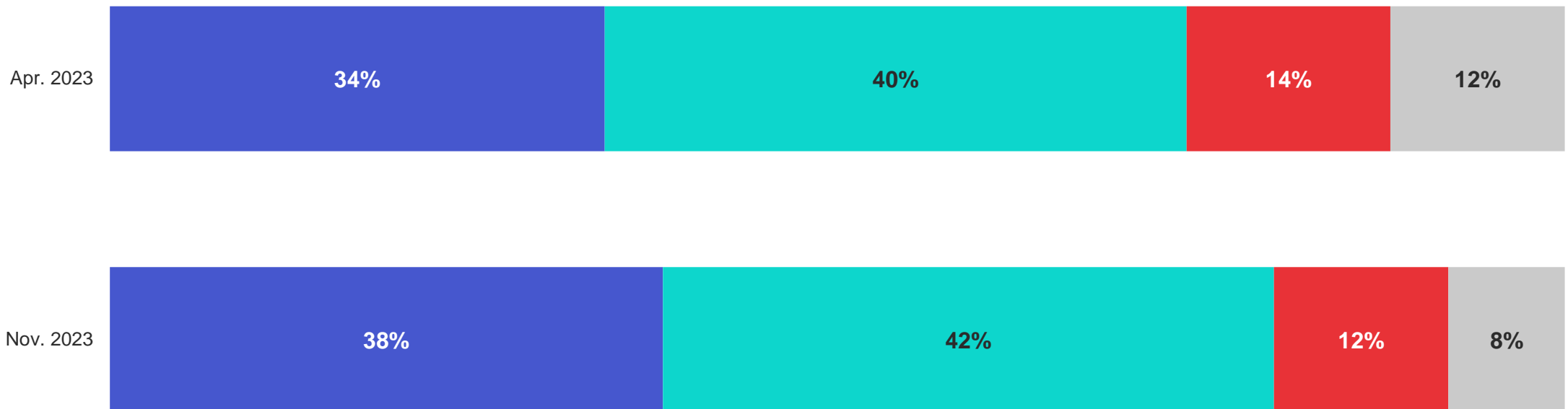
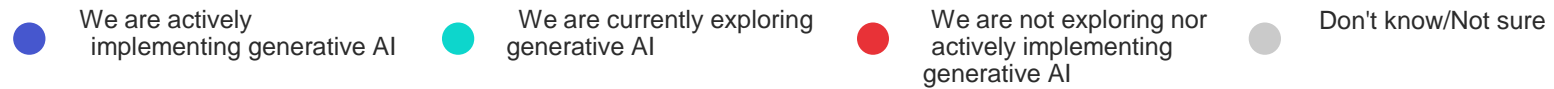


Base IT Professionals at Enterprises (organizations > 1,000 employees): Global Enterprise = 2,342n, Financial Services = 218n, Telecommunications = 103n, Government = 148n, Energy = 75n, Automotive = 68n, Industrial = 302n, Healthcare = 154n, Retail = 130n, Travel = 68n  
 \*Sample size is between 50 and 99; Note: Media & Entertainment, Chemicals/Oil/Gas, and Aerospace & Defense Industry samples sizes are too low to show

AI ADOPTION & INVESTMENTS

About 2-in-5 IT Professionals indicate that their enterprise is implementing generative AI (38%), and another 42% are currently exploring generative AI (42%).

ChatGPT has quickly raised awareness of generative AI. Is your company using generative AI?

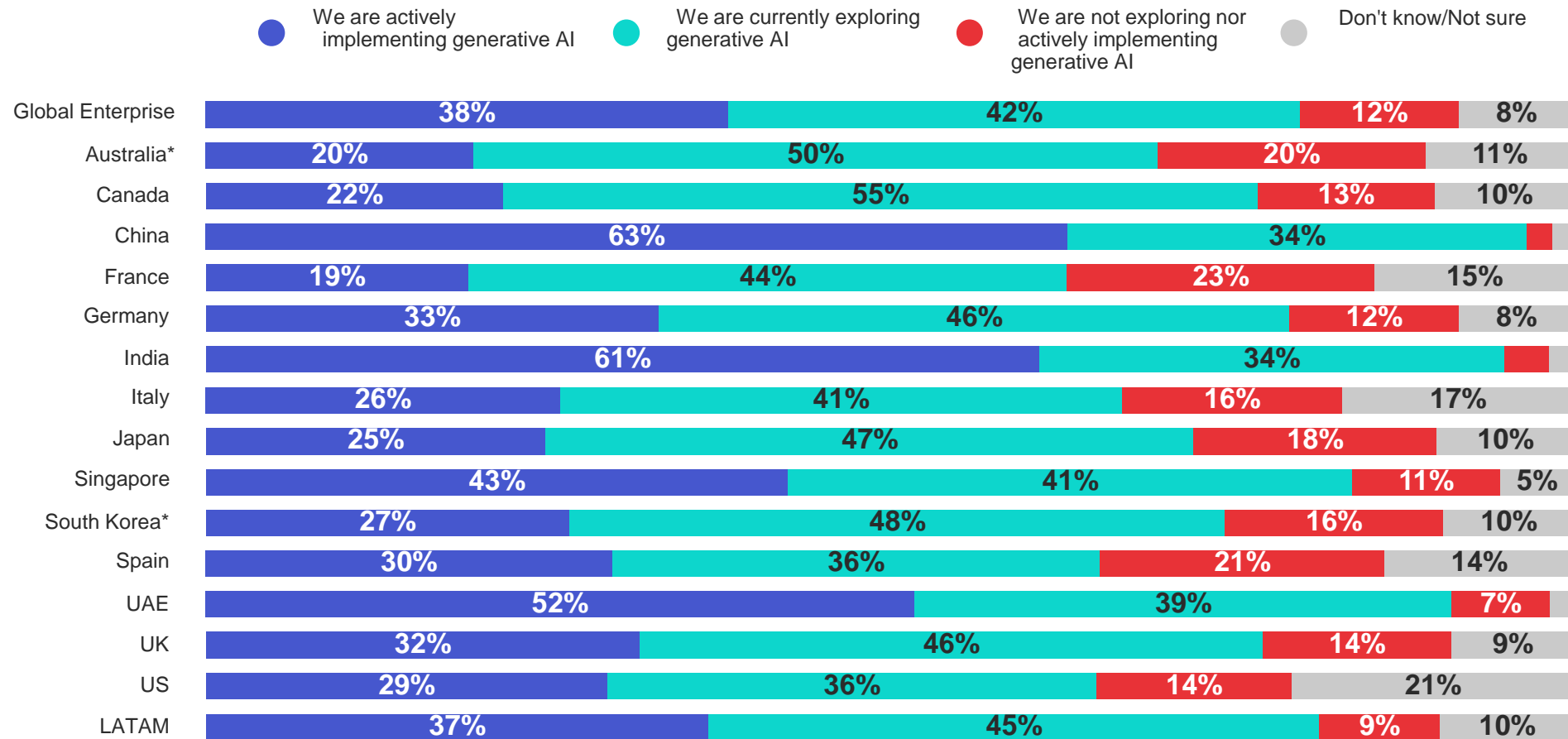




AI ADOPTION & INVESTMENTS

Since April '23, reported implementation of AI has gone up in Japan (+13%), Singapore (+14%), South Korea (+16%), and the UK (+21%).

ChatGPT has quickly raised awareness of generative AI. Is your company using generative AI?

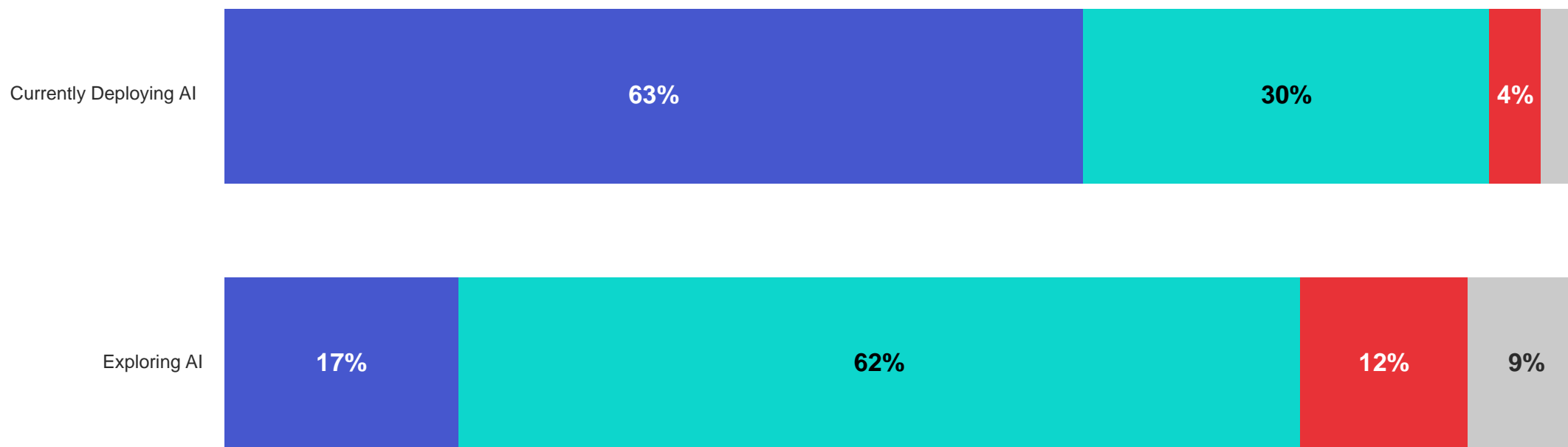
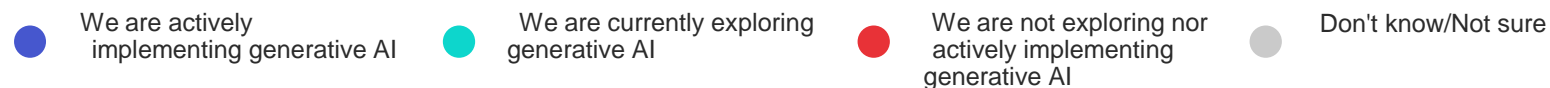


Base IT Professionals at Enterprises (organizations > 1,000 employees): Global Enterprise = 2,342n, Australia = 92n, Canada = 147n, China = 316n, France = 151n, Germany = 154n, India = 215n, Italy = 112n, Japan = 169n, Singapore = 148n, South Korea = 94n, Spain = 101n, UAE = 168n, UK = 145n, US = 126n, LATAM = 204n  
 \*Sample size is between 50 and 99

AI ADOPTION & INVESTMENTS

Generative AI adoption is driven by enterprises already deploying AI in their business operations. 63% of IT Professionals at large companies currently deploying AI also report that their company is implementing generative AI, compared to only 17% of those at companies only exploring AI.

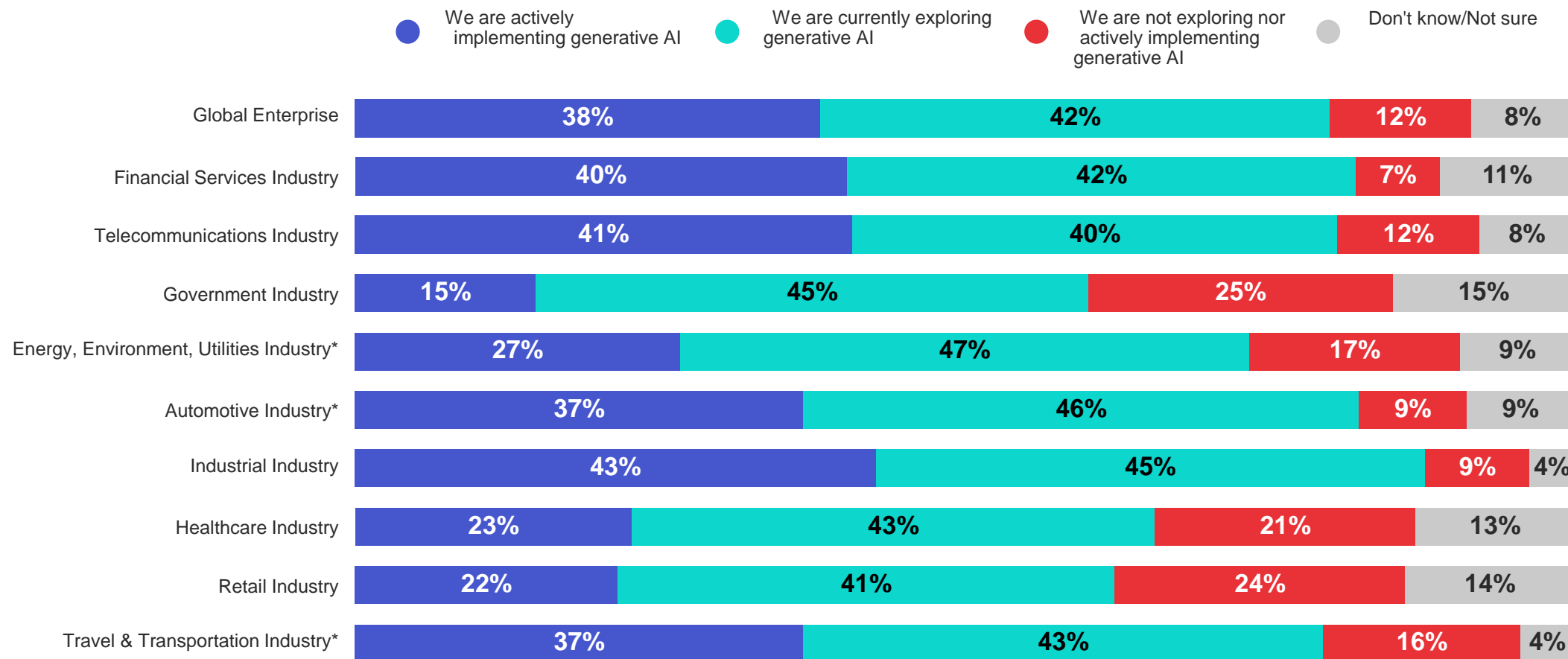
ChatGPT has quickly raised awareness of generative AI. Is your company using generative AI?



AI ADOPTION & INVESTMENTS

4-in-10 or more of IT Professionals within the financial services, telecommunications, and industrial industries indicate that their enterprise is implementing generative AI.

ChatGPT has quickly raised awareness of generative AI. Is your company using generative AI?



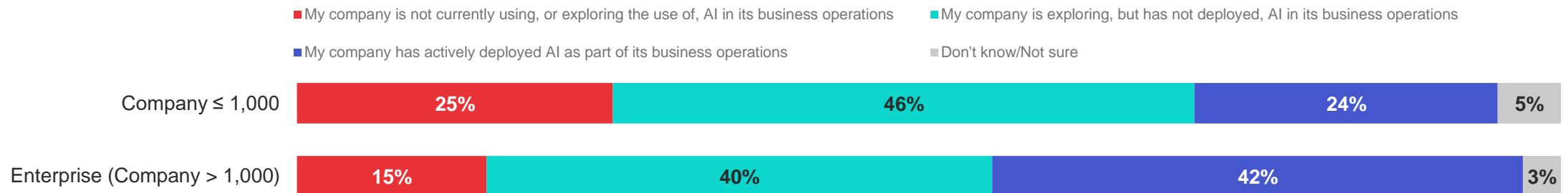
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AI ADOPTION & INVESTMENTS

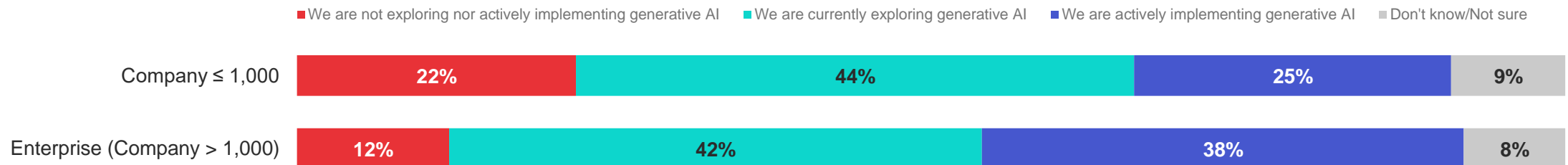
Companies with 1,000 or fewer employees are less likely than enterprises to be adopting general AI and generative AI.

Has your company adopted or explored using Artificial Intelligence (AI) as part of its business operations and digital transformation?  
ChatGPT has quickly raised awareness of generative AI. Is your company using generative AI?

General AI Adoption



Generative AI Adoption

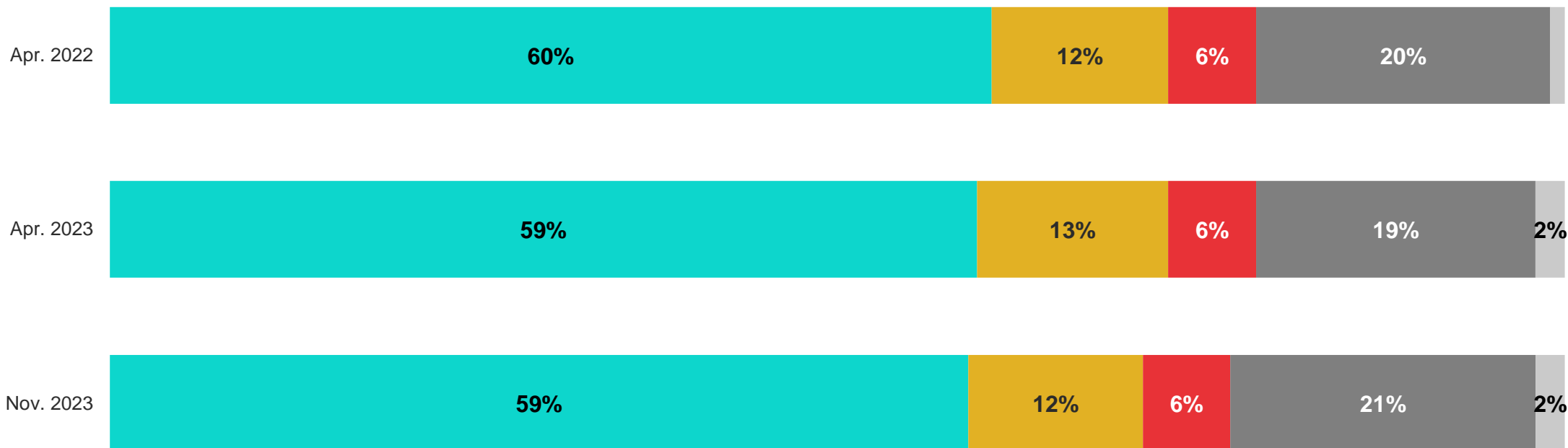


AI ADOPTION & INVESTMENTS

Investment in AI has remained relatively stable since April 2022.

Which of the following best describes your company's AI investment over the last 24 months? [Among IT Professionals at companies currently exploring or deploying AI]

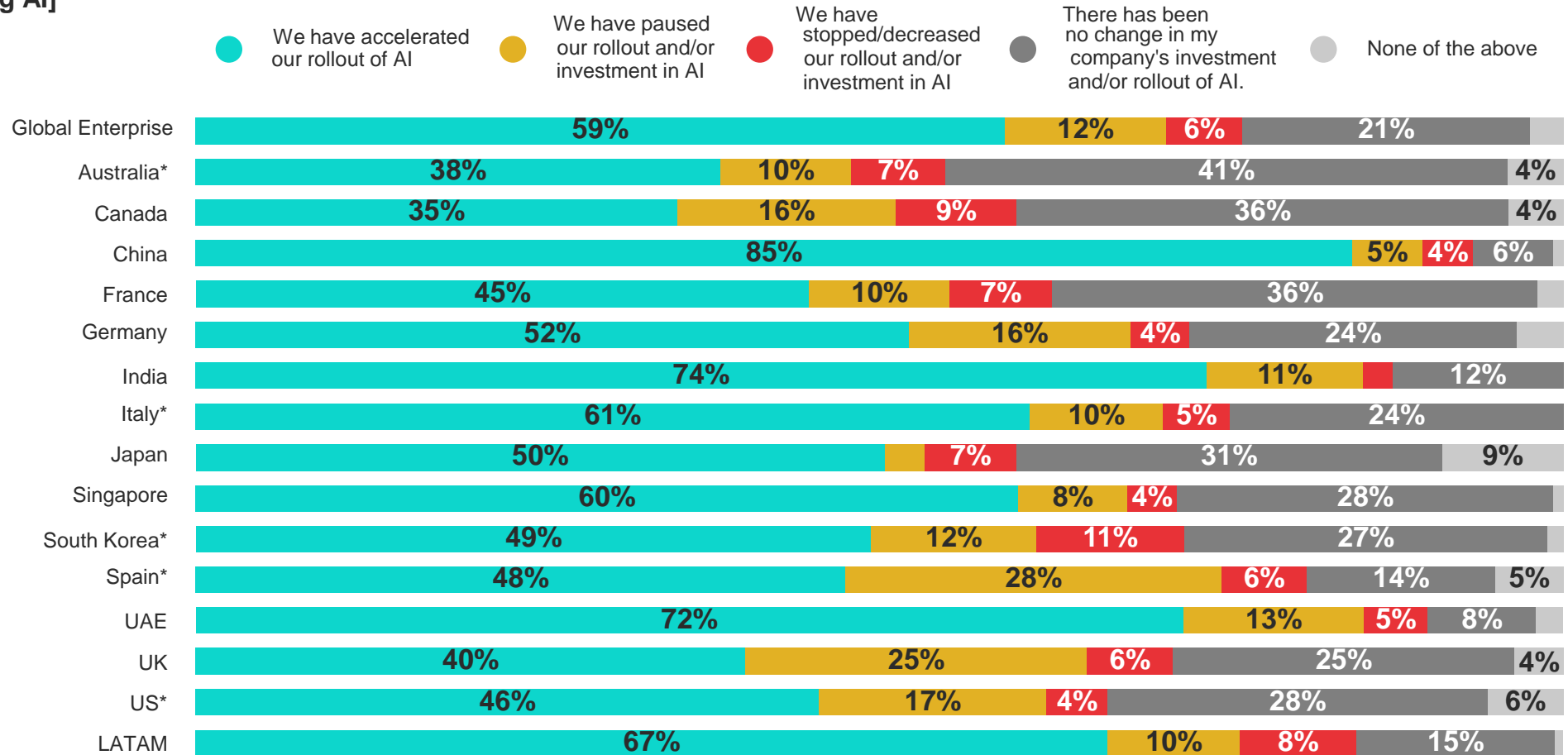
- We have accelerated our rollout of AI
- We have paused our rollout and/or investment in AI
- We have stopped/decreased our rollout and/or investment in AI
- There has been no change in my company's investment and/or rollout of AI.
- None of the above



AI ADOPTION & INVESTMENTS

59% of IT Professionals at enterprises deploying or exploring AI indicate that their organization has accelerated the AI rollout in the past 24 months, and only around 1-in-5 (21%) say that their investment has remained unchanged.

Which of the following best describes your company's AI investment over the last 24 months? [Among IT Professionals at companies currently exploring or deploying AI]



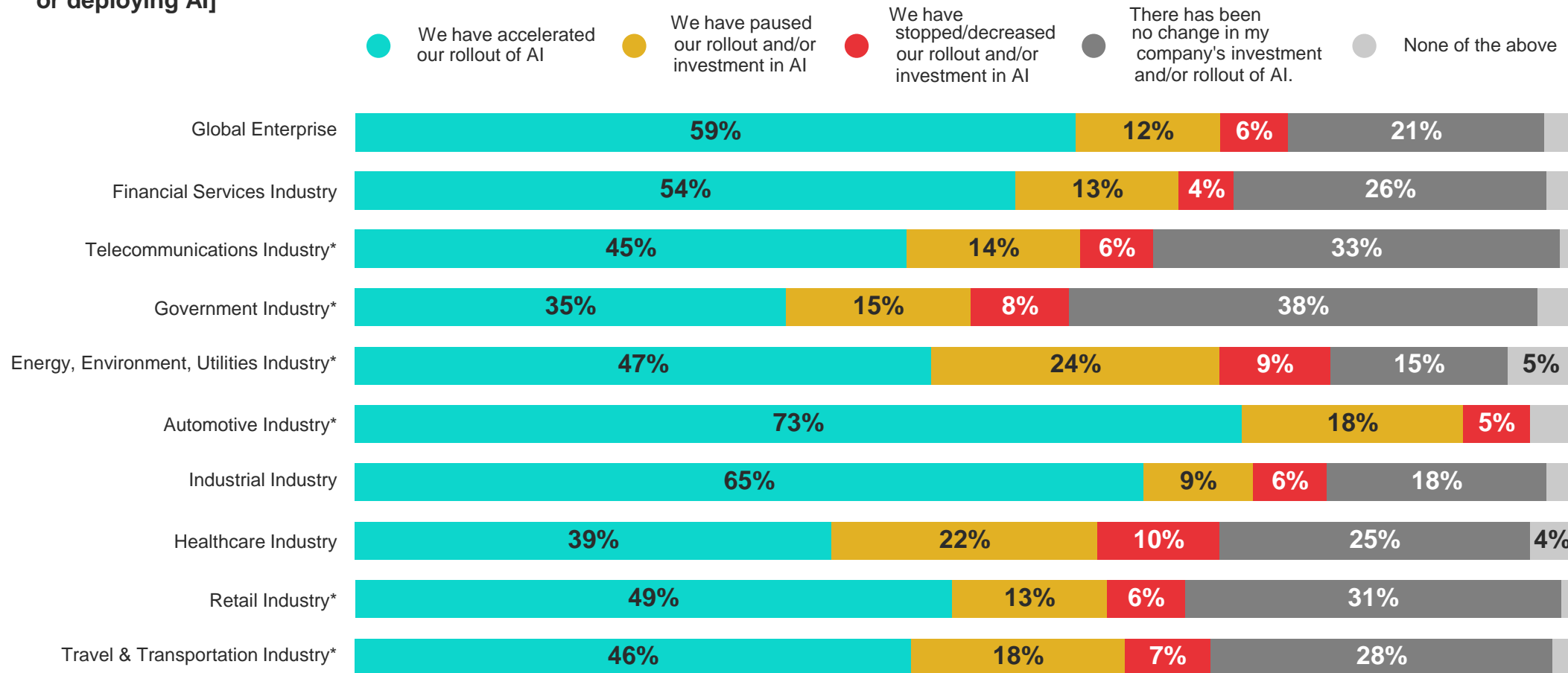
Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/deploying AI: Global Enterprise = 1,914n, Australia = 73n, Canada = 125n, China = 272n, France = 107n, Germany = 117n, India = 184n, Italy = 82n, Japan = 135n, Singapore = 138n, South Korea = 83n, Spain = 80n, UAE = 151n, UK = 112n, US = 90n, LATAM = 165n

\*Sample size is between 50 and 99

AI ADOPTION & INVESTMENTS

IT Professionals in the automotive and industrial industries are most likely to report their enterprise has accelerated AI investments in the past two years.

Which of the following best describes your company's AI investment over the last 24 months? [Among IT Professionals at companies currently exploring or deploying AI]



Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/deploying AI: Global Enterprise = 1,914n, Financial Services = 179n, Telecommunications = 84n, Government = 99n, Energy = 55n, Automotive = 55n, Industrial = 266n, Healthcare = 110n, Retail = 94n, Travel = 57n

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## AI ADOPTION & INVESTMENTS

Research and development (44%), reskilling/workforce development (39%), and building proprietary AI solutions (38%) are the top AI investments at large organizations exploring or deploying AI.

How does your company plan to invest in AI adoption over the next 12-months? Please select all that apply. **[Among IT Professionals at companies currently exploring or deploying AI]**

|  | Global Enterprise | Australia* | Canada | China | France | Germany | India | Italy* | Japan | Singapore | South Korea* | Spain* | UAE | UK  | US* | LATAM |
|--|-------------------|------------|--------|-------|--------|---------|-------|--------|-------|-----------|--------------|--------|-----|-----|-----|-------|
| Research & Development                                       | 44%               | 49%        | 41%    | 41%   | 36%    | 35%     | 67%   | 32%    | 27%   | 51%       | 51%          | 36%    | 45% | 43% | 51% | 48%   |
| Reskilling and workforce development                         | 39%               | 36%        | 42%    | 42%   | 33%    | 32%     | 55%   | 24%    | 30%   | 43%       | 37%          | 22%    | 44% | 36% | 38% | 38%   |
| Build proprietary AI solutions                               | 38%               | 30%        | 23%    | 53%   | 28%    | 39%     | 53%   | 40%    | 34%   | 37%       | 23%          | 30%    | 44% | 33% | 29% | 35%   |
| Augmenting human tasks with digital labor                    | 33%               | 34%        | 26%    | 40%   | 16%    | 40%     | 40%   | 26%    | 24%   | 33%       | 33%          | 31%    | 39% | 39% | 33% | 30%   |
| Off-the-shelf AI applications                                | 32%               | 21%        | 22%    | 39%   | 25%    | 36%     | 26%   | 26%    | 38%   | 25%       | 24%          | 32%    | 44% | 21% | 28% | 45%   |
| Embed AI into current applications and processes             | 29%               | 33%        | 28%    | 26%   | 26%    | 30%     | 42%   | 18%    | 24%   | 40%       | 27%          | 22%    | 24% | 21% | 18% | 41%   |
| Off-the-shelf tools to build our own applications and models | 29%               | 14%        | 19%    | 43%   | 16%    | 32%     | 32%   | 17%    | 31%   | 32%       | 25%          | 16%    | 30% | 21% | 20% | 38%   |
| Don't know/Not sure  | 4%                | 8%         | 7%     | 0%    | 5%     | 3%      | 1%    | 5%     | 8%    | 3%        | 1%           | 5%     | 0%  | 7%  | 12% | 2%    |
| Other  | 0%                | 1%         | 1%     | 0%    | 0%     | 1%      | 0%    | 0%     | 1%    | 1%        | 0%           | 1%     | 0%  | 0%  | 0%  | 0%    |

Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/deploying AI: Global Enterprise = 1,914n, Australia = 73n, Canada = 125n, China = 272n, France = 107n, Germany = 117n, India = 184n, Italy = 82n, Japan = 135n, Singapore = 138n, South Korea = 83n, Spain = 80n, UAE = 151n, UK = 112n, US = 90n, LATAM = 165n  
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Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

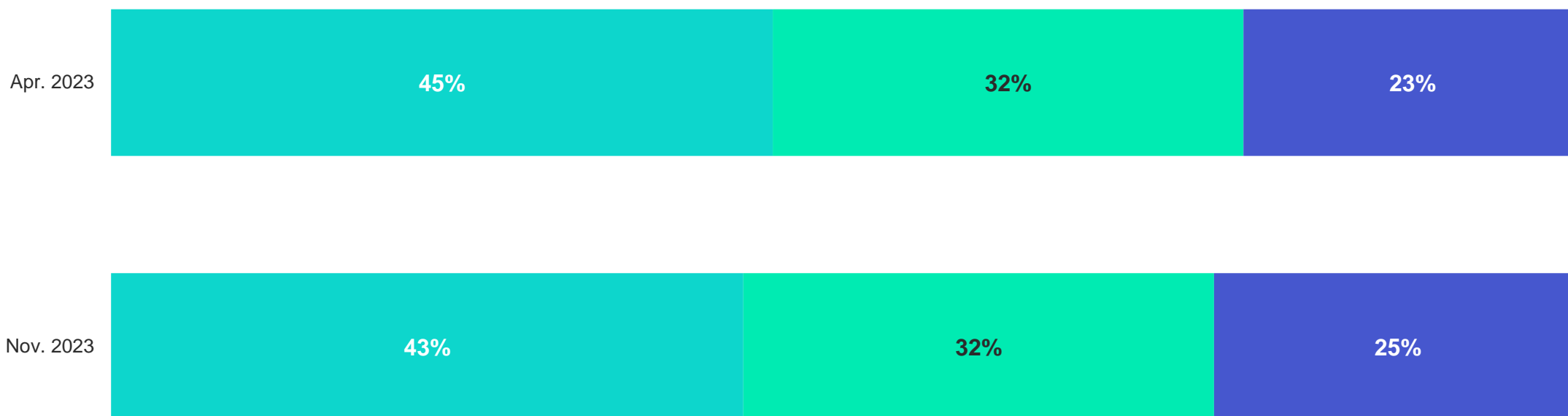


AI ADOPTION & INVESTMENTS

Among enterprises implementing or exploring generative AI, most are using either in-house technology (43%) or open-source technology (32%), with reported use of each remaining relatively unchanged since April 2023.

Are you using in-house technology, open source technology, or working with technology partner/provider? **[Among IT Professionals at companies currently exploring or implementing generative AI]**

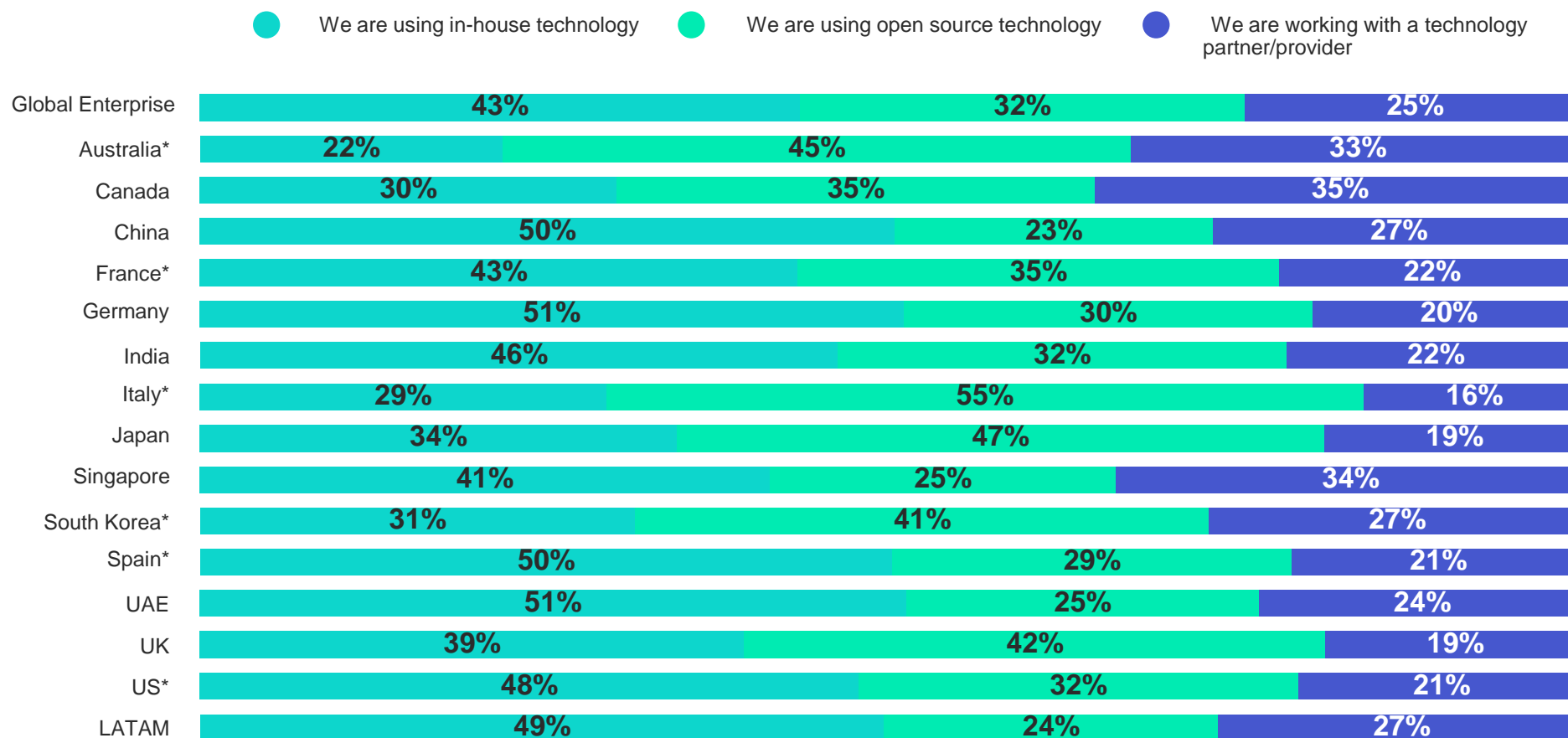
- We are using in-house technology
- We are using open source technology
- We are working with a technology partner/provider



AI ADOPTION & INVESTMENTS

IT Professionals at companies exploring or deploying generative AI in Australia, Italy, Japan, and the UK are more likely than the global average to report that their companies are using open-source technology.

Are you using in-house technology, open source technology, or working with technology partner/provider? [Among IT Professionals at companies currently exploring or implementing generative AI]

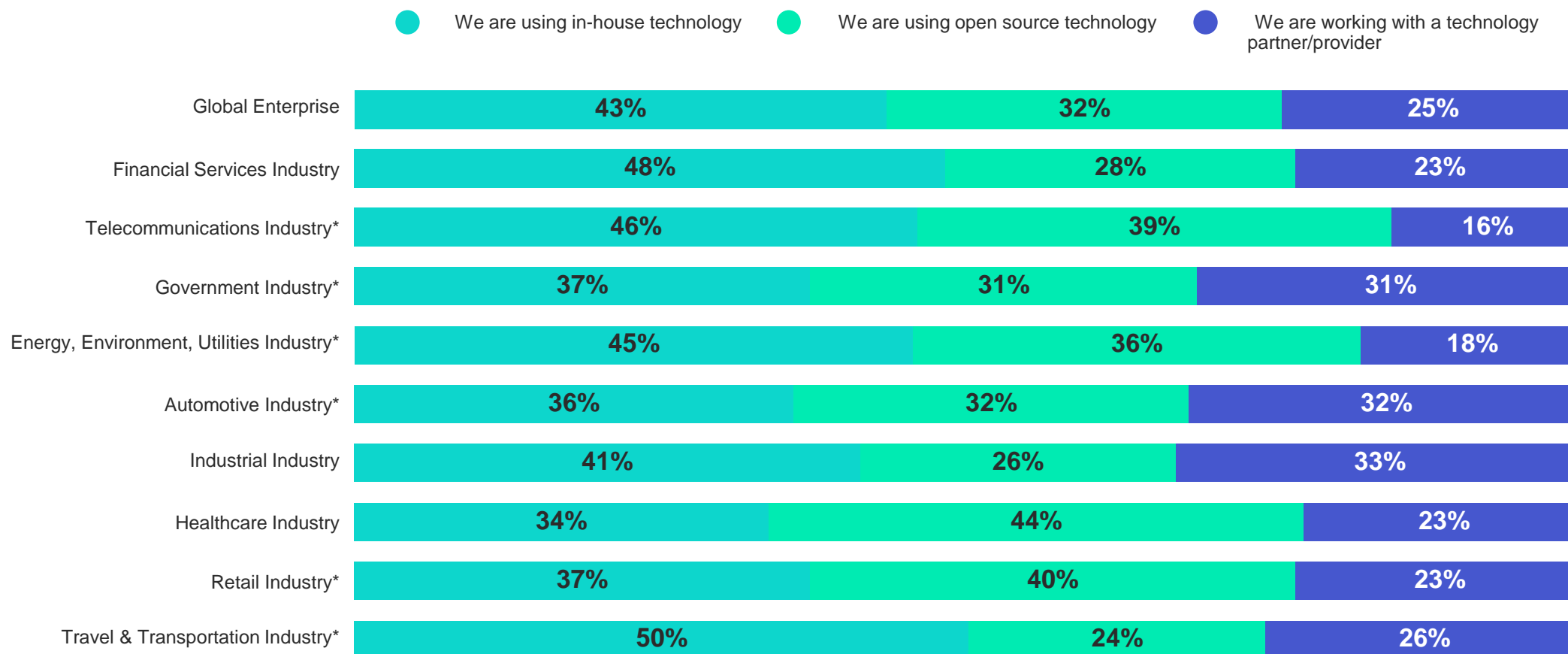


Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/implementing generative AI : Global Enterprise = 1,873n, Australia = 64n, Canada = 113n, China = 305n, France = 95n, Germany = 122n, India = 204n, Italy = 75n, Japan = 122n, Singapore = 124n, South Korea = 70n, Spain = 66n, UAE = 153n, UK = 112n, US = 82n, LATAM = 166n  
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AI ADOPTION & INVESTMENTS

In-house technology is most likely to be utilized in the financial services, telecommunications, energy, and travel industries.

Are you using in-house technology, open source technology, or working with technology partner/provider? [Among IT Professionals at companies currently exploring or implementing generative AI]

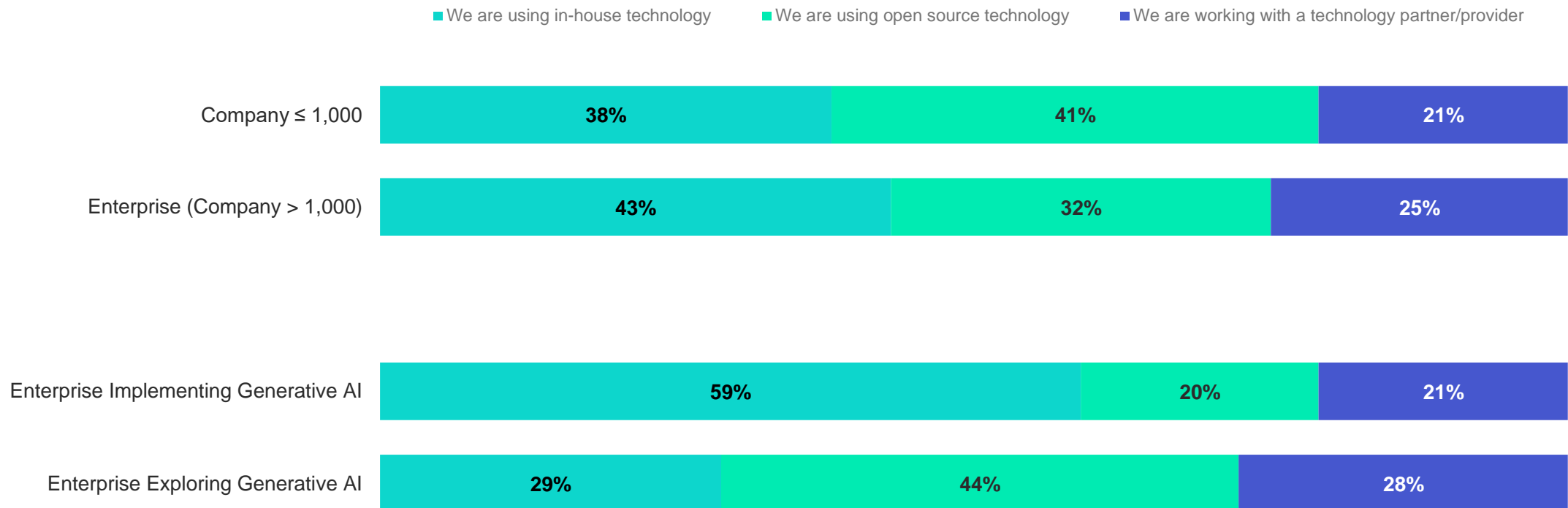


Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/implementing generative AI : Global Enterprise = 1,873n, Financial Services = 179n, Telecommunications = 83n, Government = 89n, Energy = 55n, Automotive = 55n, Industrial = 265n, Healthcare = 101n, Retail = 81n, Travel = 54n  
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AI ADOPTION & INVESTMENTS

Enterprises with more established generative AI practices are more likely to be using in-house technology over open-source technology. Similarly, in-house technology is most likely to be used by companies with more than 1,000 employees exploring or implementing generative AI.

Are you using in-house technology, open source technology, or working with technology partner/provider? **[Among IT Professionals at companies currently exploring or implementing generative AI]**



AGENDA

AI ADOPTION & INVESTMENTS

DRIVERS & BARRIERS OF AI

CURRENT USES OF AI

AI ETHICS AND RESPONSIBILITY

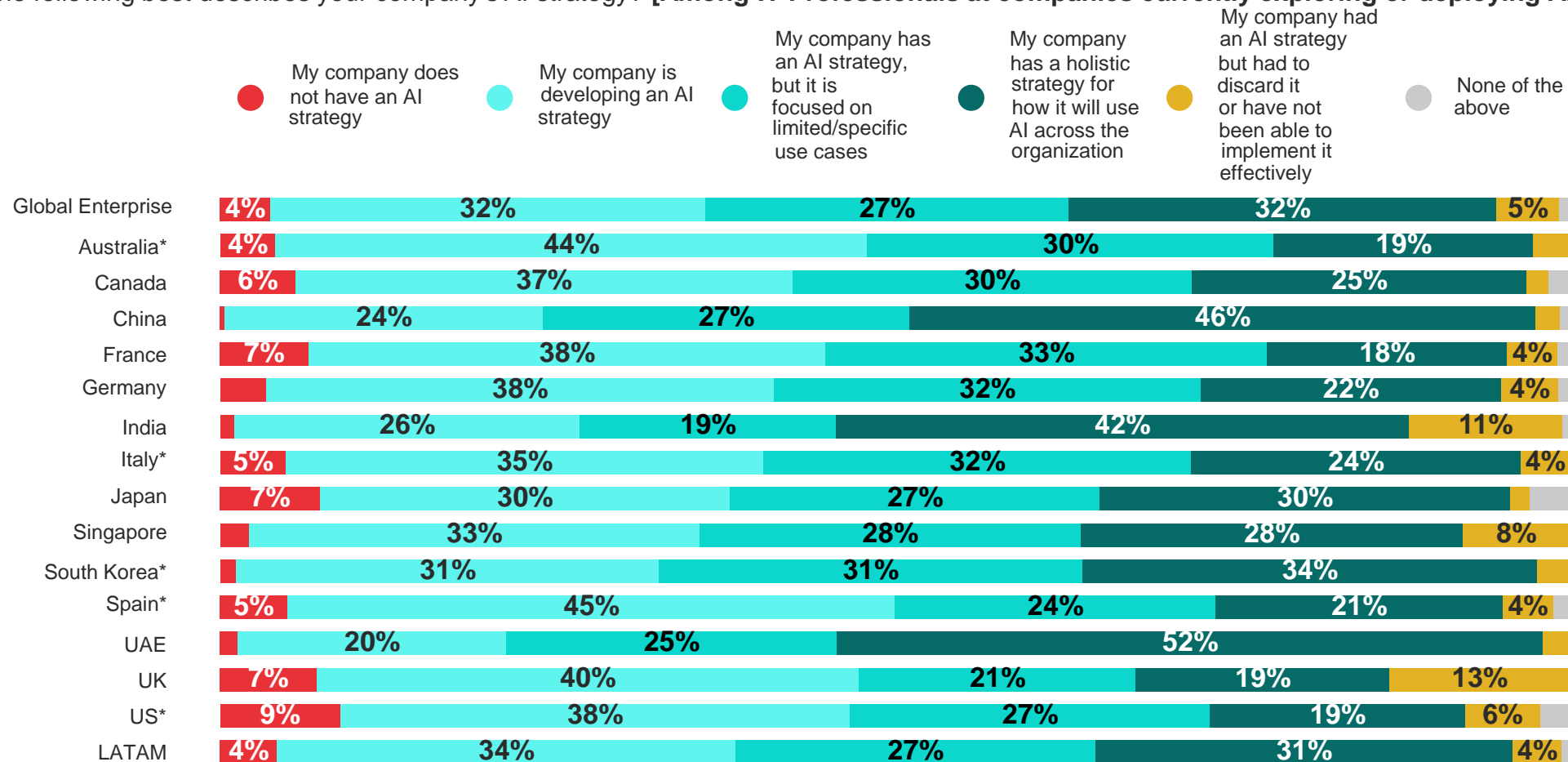
AI'S IMPACT ON EMPLOYEES



DRIVERS & BARRIERS OF AI

Most enterprises actively exploring or deploying AI have some form of AI strategy, with 27% reporting that their company has an AI strategy for limited/specific use cases and about a third (32%) stating that their organization already has a holistic strategy in place. 32% are in the process of developing an AI strategy.

Which of the following best describes your company's AI strategy? [Among IT Professionals at companies currently exploring or deploying AI]



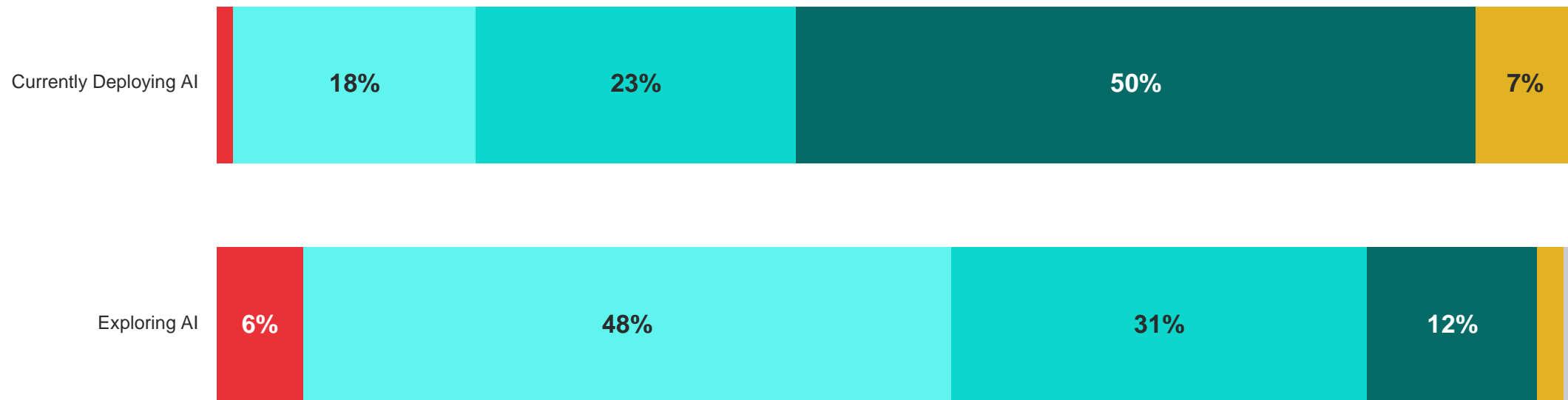
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\*Sample size is between 50 and 99

DRIVERS & BARRIERS OF AI

Enterprises exploring AI are more likely to be in the beginning stages of AI strategy, while large organizations deploying AI are more likely to have a holistic strategy in place.

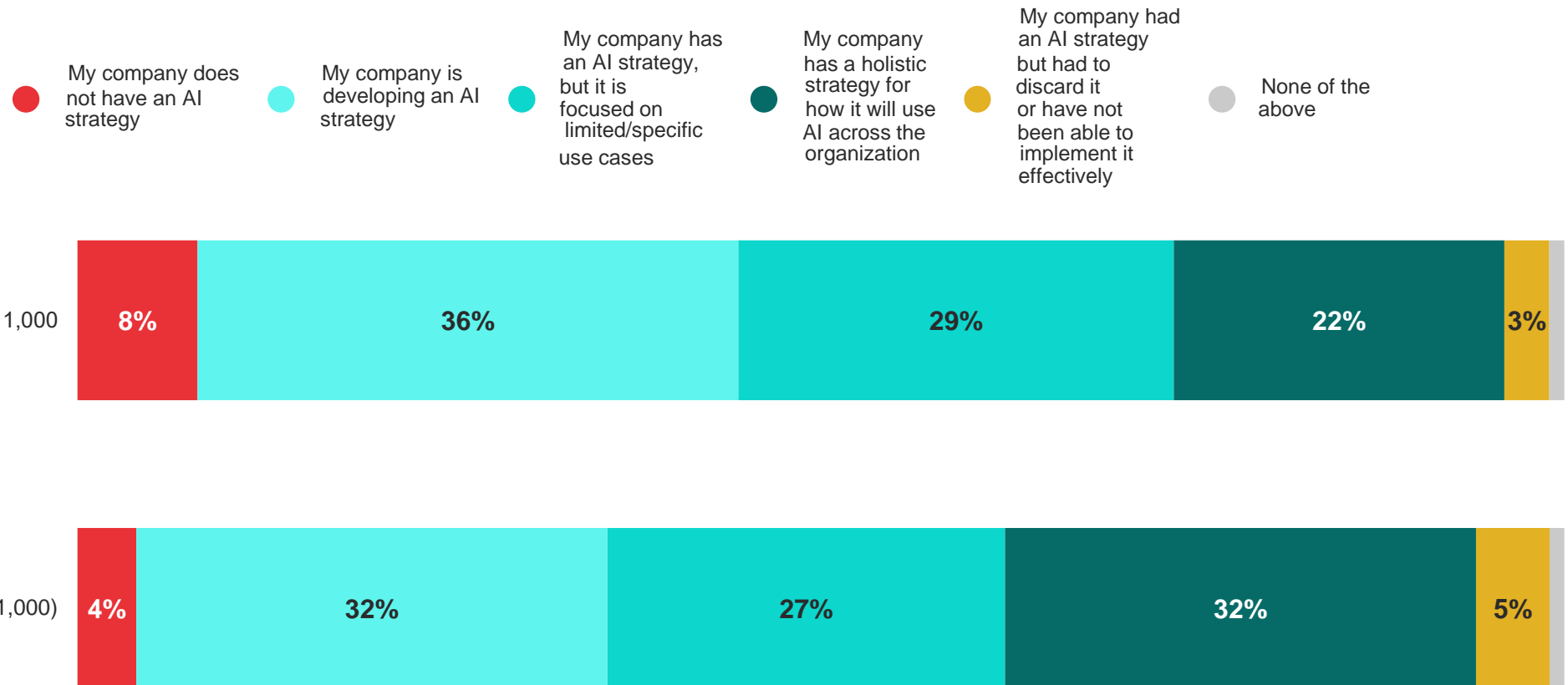
Which of the following best describes your company's AI strategy? [Among IT Professionals at companies currently exploring or deploying AI]



DRIVERS & BARRIERS OF AI

Larger organizations exploring or deploying AI are more likely than smaller organizations to have a holistic AI strategy in place (32% vs. 22%).

Which of the following best describes your company's AI strategy? [Among IT Professionals at companies currently exploring or deploying AI]





## DRIVERS & BARRIERS OF AI

Advances in AI making it more accessible (45%) is the top external driver of AI adoption at enterprises currently exploring or deploying AI, followed by the need to reduce costs and automate key processes (42%) and the increasing amount of AI embedded into standard off the shelf business applications (37%).

What external factors, if any, are helping drive AI adoption in your organization? Please select all that apply. [Among IT Professionals at companies currently exploring or deploying AI]

|  | Global Enterprise | Australia* | Canada | China | France | Germany | India | Italy* | Japan | Singapore | South Korea* | Spain* | UAE | UK  | US* | LATAM |
|--|-------------------|------------|--------|-------|--------|---------|-------|--------|-------|-----------|--------------|--------|-----|-----|-----|-------|
| Advances in AI that make it more accessible  | 45%               | 48%        | 46%    | 39%   | 32%    | 41%     | 59%   | 35%    | 42%   | 52%       | 52%          | 40%    | 41% | 51% | 42% | 55%   |
| Need to reduce costs and automate key processes  | 42%               | 48%        | 46%    | 35%   | 31%    | 40%     | 48%   | 35%    | 54%   | 49%       | 52%          | 31%    | 40% | 37% | 39% | 41%   |
| The increasing amount of AI embedded into standard off the shelf business applications | 37%               | 32%        | 34%    | 48%   | 29%    | 44%     | 47%   | 30%    | 25%   | 41%       | 27%          | 26%    | 35% | 36% | 27% | 41%   |
| Competitive pressure   | 31%               | 41%        | 30%    | 24%   | 28%    | 33%     | 39%   | 28%    | 23%   | 41%       | 20%          | 16%    | 41% | 30% | 36% | 27%   |
| Directives from leadership   | 26%               | 30%        | 26%    | 20%   | 20%    | 23%     | 32%   | 13%    | 16%   | 33%       | 27%          | 20%    | 36% | 26% | 28% | 35%   |
| Labor or skills shortages  | 25%               | 32%        | 30%    | 22%   | 19%    | 32%     | 28%   | 9%     | 47%   | 24%       | 22%          | 19%    | 28% | 29% | 36% | 9%    |
| Pressure from consumers  | 25%               | 29%        | 20%    | 29%   | 18%    | 22%     | 34%   | 17%    | 9%    | 30%       | 20%          | 15%    | 33% | 23% | 24% | 28%   |
| Company culture  | 23%               | 19%        | 13%    | 28%   | 7%     | 21%     | 26%   | 27%    | 19%   | 26%       | 20%          | 29%    | 23% | 25% | 26% | 26%   |
| Environmental pressures  | 19%               | 15%        | 10%    | 23%   | 14%    | 13%     | 26%   | 15%    | 14%   | 20%       | 23%          | 15%    | 27% | 26% | 17% | 16%   |
| Legal and regulatory compliance pressures  | 18%               | 21%        | 16%    | 16%   | 18%    | 21%     | 22%   | 13%    | 15%   | 18%       | 18%          | 10%    | 19% | 21% | 23% | 13%   |
| Supply chain issues  | 18%               | 18%        | 19%    | 22%   | 12%    | 17%     | 28%   | 7%     | 13%   | 20%       | 14%          | 9%     | 25% | 22% | 22% | 9%    |
| Demands due to the Covid-19 pandemic   | 15%               | 10%        | 10%    | 21%   | 9%     | 9%      | 24%   | 5%     | 11%   | 19%       | 19%          | 11%    | 20% | 17% | 10% | 14%   |
| None of the above  | 1%                | 1%         | 1%     | 3%    | 1%     | 1%      | 1%    | 1%     | 1%    | 0%        | 1%           | 1%     | 0%  | 3%  | 2%  | 1%    |
| Other  | 0%                | 1%         | 0%     | 0%    | 0%     | 0%      | 0%    | 0%     | 1%    | 1%        | 0%           | 1%     | 0%  | 1%  | 1%  | 1%    |

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\*Sample size is between 50 and 99

Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

## DRIVERS & BARRIERS OF AI

Compared to AI projects 2 to 3 years ago, Enterprise IT Professionals consider accessible AI solutions (43%), the increased prevalence of data, AI, and automation skills (42%), and AI tailored solutions (41%) the most important changes in the industry.

Compared to AI projects 2-3 years ago, what are the most important changes you see in the industry? Please select no more than three.

|   | Global Enterprise | Australia* | Canada | China | France | Germany | India | Italy | Japan | Singapore | South Korea* | Spain | UAE | UK  | US  | LATAM |
|---|-------------------|------------|--------|-------|--------|---------|-------|-------|-------|-----------|--------------|-------|-----|-----|-----|-------|
| AI solutions are more accessible and easier to deploy   | 43%               | 40%        | 41%    | 47%   | 38%    | 40%     | 57%   | 38%   | 36%   | 41%       | 49%          | 26%   | 48% | 38% | 40% | 50%   |
| Data, AI and automation skills are more prevalent, teams are positioned to build, deploy, and manage AI | 42%               | 35%        | 39%    | 53%   | 24%    | 34%     | 55%   | 27%   | 27%   | 49%       | 50%          | 41%   | 52% | 43% | 36% | 43%   |
| AI solutions are better designed to fit the needs of businesses   | 41%               | 34%        | 35%    | 51%   | 30%    | 37%     | 49%   | 38%   | 28%   | 47%       | 40%          | 38%   | 53% | 32% | 39% | 46%   |
| Businesses have clear data and AI strategies  | 31%               | 27%        | 24%    | 36%   | 21%    | 34%     | 38%   | 21%   | 21%   | 37%       | 29%          | 31%   | 48% | 32% | 22% | 34%   |
| Businesses have ethical guidelines in place for their AI adoption                                       | 27%               | 32%        | 19%    | 35%   | 20%    | 21%     | 33%   | 21%   | 30%   | 26%       | 17%          | 16%   | 35% | 32% | 24% | 25%   |
| Don't know/Not sure   | 6%                | 10%        | 8%     | 1%    | 11%    | 8%      | 0%    | 5%    | 20%   | 3%        | 6%           | 6%    | 1%  | 4%  | 14% | 2%    |
| Other   | 0%                | 0%         | 0%     | 0%    | 0%     | 1%      | 0%    | 1%    | 1%    | 0%        | 1%           | 1%    | 0%  | 1%  | 1%  | 0%    |

Base IT Professionals at Enterprises (organizations > 1,000 employees): Global Enterprise = 2,342n, Australia = 92n, Canada = 147n, China = 316n, France = 151n, Germany = 154n, India = 215n, Italy = 112n, Japan = 169n, Singapore = 148n, South Korea = 94n, Spain = 101n, UAE = 168n, UK = 145n, US = 126n, LATAM = 204n

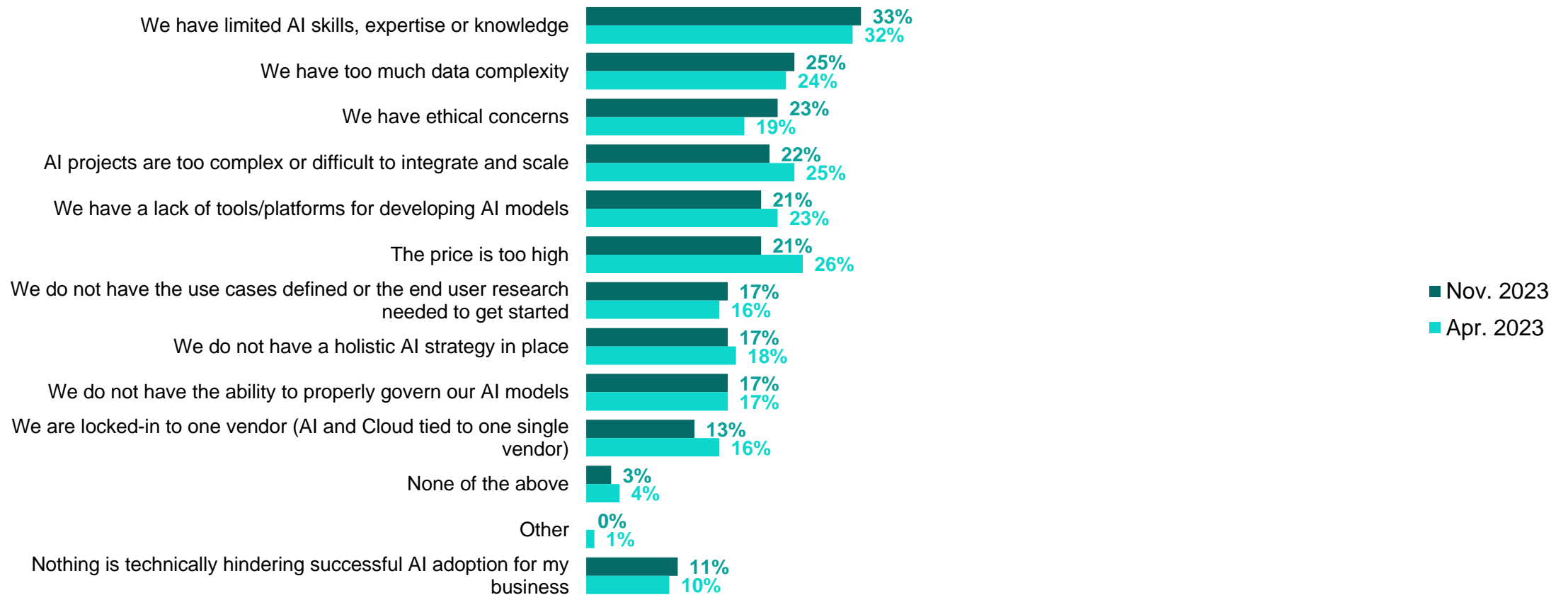
\*Sample size is between 50 and 99

Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

## DRIVERS & BARRIERS OF AI

Barriers to successful AI adoption have stayed consistent from April, although high prices are less likely to be a hinderance in November (April '23 26% vs. Nov. '23 21%).

What, if anything, is hindering successful AI adoption for your business? Please select all that apply. **[Among IT Professionals at companies currently exploring or deploying AI]**



## DRIVERS & BARRIERS OF AI

Despite the increased prevalence in AI related skills, IT Professionals at enterprises exploring or deploying AI are most likely to express that limited AI skills and expertise (33%) are hindering successful AI adoption. Around 25% respectively also say that too much data complexity (25%) and ethical concerns (23%) are barriers to adoption.

What, if anything, is hindering successful AI adoption for your business? Please select all that apply. **[Among IT Professionals at companies currently exploring or deploying AI]**

|   | Global Enterprise | Australia* | Canada | China | France | Germany | India | Italy* | Japan | Singapore | South Korea* | Spain* | UAE | UK  | US* | LATAM |
|---|-------------------|------------|--------|-------|--------|---------|-------|--------|-------|-----------|--------------|--------|-----|-----|-----|-------|
| We have limited AI skills, expertise or knowledge                                   | 33%               | 48%        | 41%    | 25%   | 25%    | 34%     | 30%   | 27%    | 46%   | 37%       | 43%          | 16%    | 36% | 38% | 28% | 32%   |
| We have too much data complexity  | 25%               | 27%        | 24%    | 28%   | 15%    | 20%     | 25%   | 18%    | 27%   | 31%       | 25%          | 19%    | 30% | 29% | 18% | 21%   |
| We have ethical concerns  | 23%               | 40%        | 20%    | 21%   | 19%    | 27%     | 26%   | 12%    | 23%   | 24%       | 22%          | 12%    | 24% | 22% | 22% | 23%   |
| AI projects are too complex or difficult to integrate and scale                     | 22%               | 18%        | 20%    | 19%   | 14%    | 21%     | 27%   | 11%    | 25%   | 33%       | 31%          | 16%    | 28% | 19% | 12% | 22%   |
| The price is too high   | 21%               | 26%        | 24%    | 14%   | 18%    | 16%     | 21%   | 21%    | 19%   | 27%       | 27%          | 15%    | 34% | 31% | 17% | 19%   |
| We have a lack of tools/platforms for developing AI models                          | 21%               | 19%        | 14%    | 19%   | 15%    | 20%     | 28%   | 12%    | 25%   | 23%       | 34%          | 24%    | 25% | 24% | 8%  | 21%   |
| We do not have a holistic AI strategy in place                                      | 17%               | 22%        | 18%    | 18%   | 6%     | 15%     | 17%   | 11%    | 29%   | 19%       | 17%          | 14%    | 26% | 14% | 17% | 12%   |
| We do not have the ability to properly govern our AI models                         | 17%               | 16%        | 21%    | 16%   | 13%    | 13%     | 16%   | 11%    | 30%   | 14%       | 19%          | 22%    | 25% | 15% | 17% | 9%    |
| We do not have the use cases defined or the end user research needed to get started | 17%               | 12%        | 13%    | 21%   | 18%    | 11%     | 24%   | 10%    | 16%   | 20%       | 20%          | 12%    | 14% | 19% | 17% | 13%   |
| We are locked-in to one vendor (AI and Cloud tied to one single vendor)             | 13%               | 10%        | 6%     | 17%   | 10%    | 9%      | 18%   | 7%     | 12%   | 9%        | 10%          | 6%     | 21% | 15% | 10% | 15%   |
| Nothing is technically hindering successful AI adoption for my business             | 11%               | 10%        | 10%    | 19%   | 8%     | 13%     | 11%   | 15%    | 1%    | 9%        | 4%           | 12%    | 5%  | 10% | 16% | 13%   |
| None of the above   | 3%                | 0%         | 4%     | 2%    | 5%     | 1%      | 5%    | 5%     | 3%    | 5%        | 0%           | 3%     | 1%  | 1%  | 8%  | 4%    |
| Other   | 0%                | 0%         | 0%     | 0%    | 1%     | 2%      | 0%    | 0%     | 1%    | 1%        | 0%           | 1%     | 0%  | 1%  | 0%  | 0%    |

Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/deploying AI: Global Enterprise = 1,914n, Australia = 73n, Canada = 125n, China = 272n, France = 107n, Germany = 117n, India = 184n, Italy = 82n, Japan = 135n, Singapore = 138n, South Korea = 83n, Spain = 80n, UAE = 151n, UK = 112n, US = 90n, LATAM = 165n

\*Sample size is between 50 and 99

Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

## DRIVERS & BARRIERS OF AI

### Barriers to AI Adoption: Cross Selection Analysis

What, if anything, is hindering successful AI adoption for your business? Please select all that apply. [Among IT Professionals at companies currently exploring or deploying AI]

*Understanding the Table:* The values in this table represent the percentage of IT Professionals who, when selecting one barrier to AI adoption, also chose another barrier. For example, the cell at the intersection of "We have limited AI skills, expertise or knowledge" column and "We have a lack of tools/platforms for developing AI models" row shows "8%," this indicates that 8% of IT Professionals identified limited AI skills and lack of tools as a barrier.

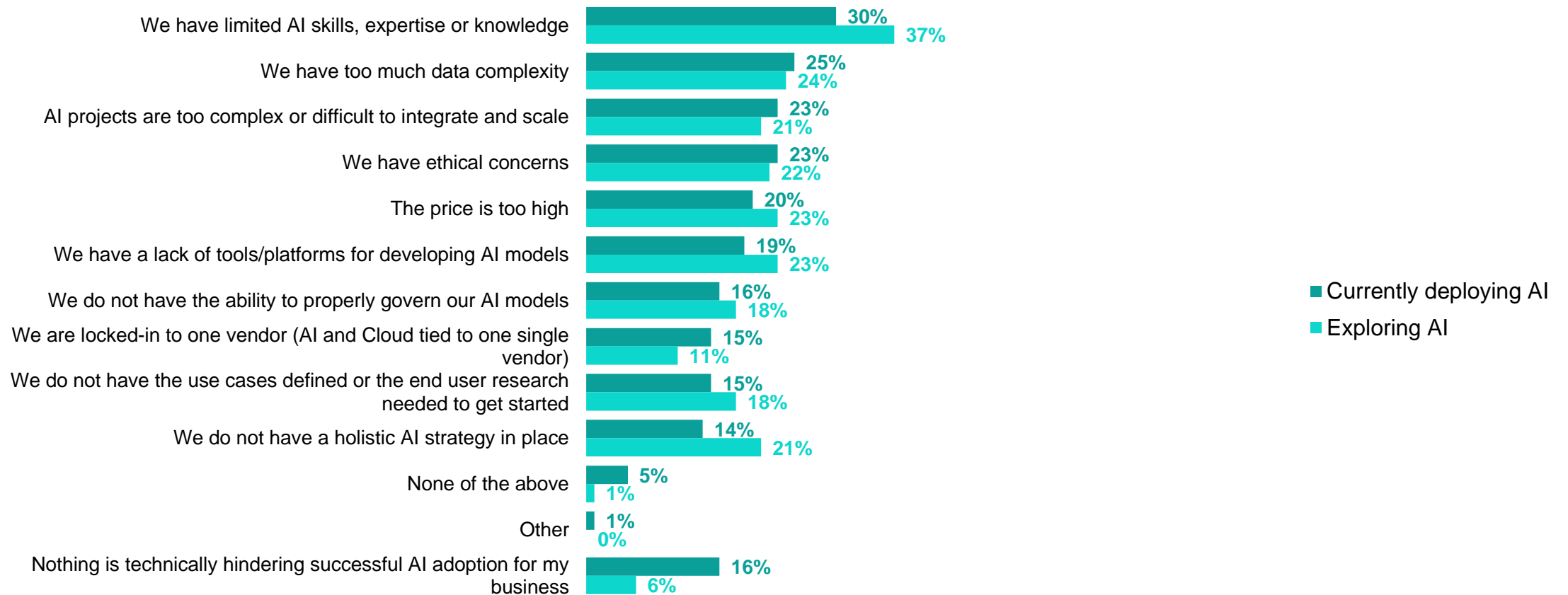
| Statements  |                          | We do not have the use cases defined or the end user research needed to get started | We do not have a holistic AI strategy in place | We have too much data complexity | We have limited AI skills, expertise or knowledge | We have a lack of tools/platforms for developing AI models | We are locked-in to one vendor (AI and Cloud tied to one single vendor) | The price is too high | We have ethical concerns | AI projects are too complex or difficult to integrate and scale |
|---|--------------------------|---|--|----------------------------------|---|--|---|-----------------------|--------------------------|---|
|   | <b>Overall Selection</b> | 17%   | 17%  | 25%                              | 33%   | 21%  | 13%   | 21%                   | 23%                      | 22%   |
| We do not have a holistic AI strategy in place                          | 17%                      | 4%  |  |                                  |   |  |   |                       |                          |   |
| We have too much data complexity  | 25%                      | 5%  | 5%   |                                  |   |  |   |                       |                          |   |
| We have limited AI skills, expertise or knowledge                       | 33%                      | 6%  | 7%   | 9%                               |   |  |   |                       |                          |   |
| We have a lack of tools/platforms for developing AI models              | 21%                      | 5%  | 4%   | 7%                               | 8%  |  |   |                       |                          |   |
| We are locked-in to one vendor (AI and Cloud tied to one single vendor) | 13%                      | 4%  | 3%   | 4%                               | 4%  | 3%   |   |                       |                          |   |
| The price is too high   | 21%                      | 4%  | 4%   | 5%                               | 8%  | 5%   | 3%  |                       |                          |   |
| We have ethical concerns  | 23%                      | 5%  | 4%   | 7%                               | 8%  | 5%   | 4%  | 5%                    |                          |   |
| AI projects are too complex or difficult to integrate and scale         | 22%                      | 4%  | 4%   | 6%                               | 8%  | 6%   | 3%  | 6%                    | 6%                       |   |
| We do not have the ability to properly govern our AI models             | 17%                      | 4%  | 4%   | 4%                               | 7%  | 5%   | 3%  | 5%                    | 5%                       | 5%  |

- For most IT Professionals globally at large companies deploying or exploring AI, lack of skill is the main obstacle for success to adopt AI (33%).
  - Those who report **lack of skill** tend to **report other hinderances**.
  - Those who say they are **locked into a vendor cite fewer additional challenges**.
  - Enterprises encountering **data complexity challenges** are most likely to also face issues related to **limited AI experience**.
- On average, IT Professionals select approximately **2 barriers to successful AI adoption**.

DRIVERS & BARRIERS OF AI

Enterprises exploring AI are more likely than those deploying AI to experience issues with limited AI expertise, lack of tools for AI model development, and an absence of a holistic AI strategy.

What, if anything, is hindering successful AI adoption for your business? Please select all that apply. [Among IT Professionals at companies currently exploring or deploying AI]



## DRIVERS & BARRIERS OF AI

Nearly a third (32%) of IT Professionals at enterprises deploying AI in China say that nothing is technically hindering successful AI adoption for their business.

What, if anything, is hindering successful AI adoption for your business? Please select all that apply. **[Among IT Professionals at companies currently DEPLOYING AI]**

|   | Global Enterprise | Australia** | Canada* | China | France** | Germany* | India | Italy** | Japan* | Singapore* | South Korea** | Spain** | UAE* | UK* | US** | LATAM* |
|---|-------------------|-------------|---------|-------|----------|----------|-------|---------|--------|------------|---------------|---------|------|-----|------|--------|
| We have limited AI skills, expertise or knowledge                                   | 30%               |             | 38%     | 21%   |          | 30%      | 28%   |         | 49%    | 33%        |               |         | 37%  | 36% |      | 23%    |
| We have too much data complexity  | 25%               |             | 15%     | 26%   |          | 28%      | 28%   |         | 37%    | 28%        |               |         | 27%  | 30% |      | 13%    |
| We have ethical concerns  | 23%               |             | 16%     | 17%   |          | 28%      | 26%   |         | 28%    | 28%        |               |         | 24%  | 32% |      | 25%    |
| AI projects are too complex or difficult to integrate and scale                     | 23%               |             | 24%     | 15%   |          | 22%      | 28%   |         | 26%    | 29%        |               |         | 27%  | 21% |      | 23%    |
| The price is too high   | 20%               |             | 16%     | 10%   |          | 18%      | 19%   |         | 11%    | 22%        |               |         | 33%  | 26% |      | 17%    |
| We have a lack of tools/platforms for developing AI models                          | 19%               |             | 11%     | 12%   |          | 16%      | 27%   |         | 26%    | 24%        |               |         | 21%  | 34% |      | 16%    |
| We do not have the ability to properly govern our AI models                         | 16%               |             | 22%     | 10%   |          | 14%      | 14%   |         | 30%    | 17%        |               |         | 22%  | 25% |      | 4%     |
| We do not have the use cases defined or the end user research needed to get started | 15%               |             | 18%     | 15%   |          | 12%      | 26%   |         | 18%    | 18%        |               |         | 12%  | 23% |      | 9%     |
| We are locked-in to one vendor (AI and Cloud tied to one single vendor)             | 15%               |             | 9%      | 8%    |          | 20%      | 18%   |         | 21%    | 10%        |               |         | 23%  | 23% |      | 15%    |
| We do not have a holistic AI strategy in place                                      | 14%               |             | 11%     | 14%   |          | 16%      | 17%   |         | 21%    | 14%        |               |         | 26%  | 11% |      | 8%     |
| None of the above   | 5%                |             | 9%      | 4%    |          | 2%       | 6%    |         | 2%     | 9%         |               |         | 1%   | 0%  |      | 6%     |
| Other   | 1%                |             | 0%      | 0%    |          | 0%       | 0%    |         | 2%     | 1%         |               |         | 0%   | 2%  |      | 0%     |
| Nothing is technically hindering successful AI adoption for my business             | 16%               |             | 15%     | 32%   |          | 12%      | 16%   |         | 2%     | 14%        |               |         | 6%   | 8%  |      | 21%    |

Base IT Professionals at Enterprises (organizations > 1,000 employees) deploying AI: Global Enterprise = 984n, Canada = 55n, China = 157n, Germany = 50n, India = 126n, Japan = 57n, Singapore = 78n, UAE = 98n, UK = 53n, LATAM = 96n

\*Sample size is between 50 and 99; \*\*Australia, France, Italy, South Korea, Spain, and US samples sizes are too low to show

Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

## DRIVERS & BARRIERS OF AI

Across nearly all surveyed markets, limited AI skills is the top challenge enterprises exploring AI face as they pursue successful AI Adoption.

What, if anything, is hindering successful AI adoption for your business? Please select all that apply. **[Among IT Professionals at companies EXPLORING AI]**

|   | Global Enterprise | Australia** | Canada* | China | France* | Germany* | India* | Italy** | Japan* | Singapore* | South Korea** | Spain* | UAE* | UK* | US** | LATAM* |
|---|-------------------|-------------|---------|-------|---------|----------|--------|---------|--------|------------|---------------|--------|------|-----|------|--------|
| We have limited AI skills, expertise or knowledge                                   | 37%               |             | 43%     | 31%   | 21%     | 37%      | 36%    |         | 44%    | 42%        |               | 12%    | 36%  | 41% |      | 45%    |
| We have too much data complexity  | 24%               |             | 31%     | 30%   | 18%     | 13%      | 19%    |         | 21%    | 35%        |               | 17%    | 36%  | 27% |      | 33%    |
| We have a lack of tools/platforms for developing AI models                          | 23%               |             | 17%     | 29%   | 19%     | 22%      | 31%    |         | 24%    | 22%        |               | 31%    | 30%  | 15% |      | 29%    |
| The price is too high   | 23%               |             | 30%     | 20%   | 18%     | 15%      | 26%    |         | 24%    | 33%        |               | 21%    | 36%  | 36% |      | 23%    |
| We have ethical concerns  | 22%               |             | 23%     | 27%   | 18%     | 27%      | 24%    |         | 19%    | 18%        |               | 12%    | 23%  | 14% |      | 20%    |
| AI projects are too complex or difficult to integrate and scale                     | 21%               |             | 17%     | 25%   | 15%     | 21%      | 24%    |         | 24%    | 38%        |               | 12%    | 32%  | 17% |      | 22%    |
| We do not have a holistic AI strategy in place                                      | 21%               |             | 23%     | 24%   | 7%      | 15%      | 17%    |         | 35%    | 25%        |               | 17%    | 28%  | 17% |      | 16%    |
| We do not have the use cases defined or the end user research needed to get started | 18%               |             | 9%      | 29%   | 22%     | 10%      | 19%    |         | 14%    | 23%        |               | 17%    | 17%  | 15% |      | 17%    |
| We do not have the ability to properly govern our AI models                         | 18%               |             | 20%     | 25%   | 10%     | 12%      | 19%    |         | 31%    | 10%        |               | 25%    | 30%  | 7%  |      | 16%    |
| We are locked-in to one vendor (AI and Cloud tied to one single vendor)             | 11%               |             | 4%      | 29%   | 7%      | 1%       | 17%    |         | 5%     | 8%         |               | 4%     | 17%  | 8%  |      | 16%    |
| None of the above   | 1%                |             | 0%      | 0%    | 1%      | 0%       | 2%     |         | 4%     | 0%         |               | 0%     | 0%   | 2%  |      | 1%     |
| Other   | 0%                |             | 0%      | 0%    | 0%      | 3%       | 0%     |         | 1%     | 2%         |               | 0%     | 0%   | 0%  |      | 0%     |
| Nothing is technically hindering successful AI adoption for my business             | 6%                |             | 7%      | 1%    | 9%      | 13%      | 0%     |         | 1%     | 3%         |               | 6%     | 2%   | 12% |      | 1%     |

Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring AI: Global Enterprise = 930, Canada = 70n, China = 115n, France = 68n, Germany = 67n, India = 58n, Japan = 78n, Singapore = 60n, Spain = 52n, UAE = 53n, UK = 59n, LATAM = 69n

\*Sample size is between 50 and 99; \*\*Australia, Italy, South Korea, and US samples sizes are too low to show

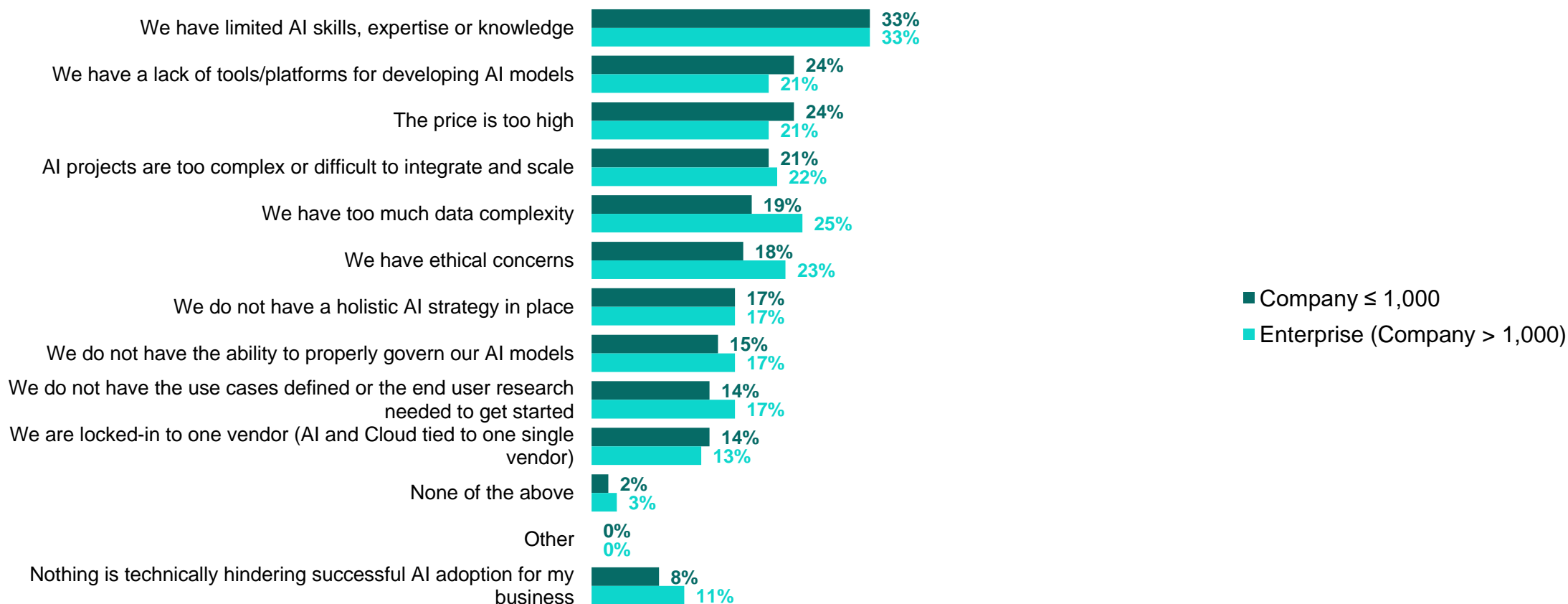
Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market



DRIVERS & BARRIERS OF AI

Enterprises currently exploring or deploying AI are more likely than smaller organizations to face challenges such as too much data complexity and ethical concerns.

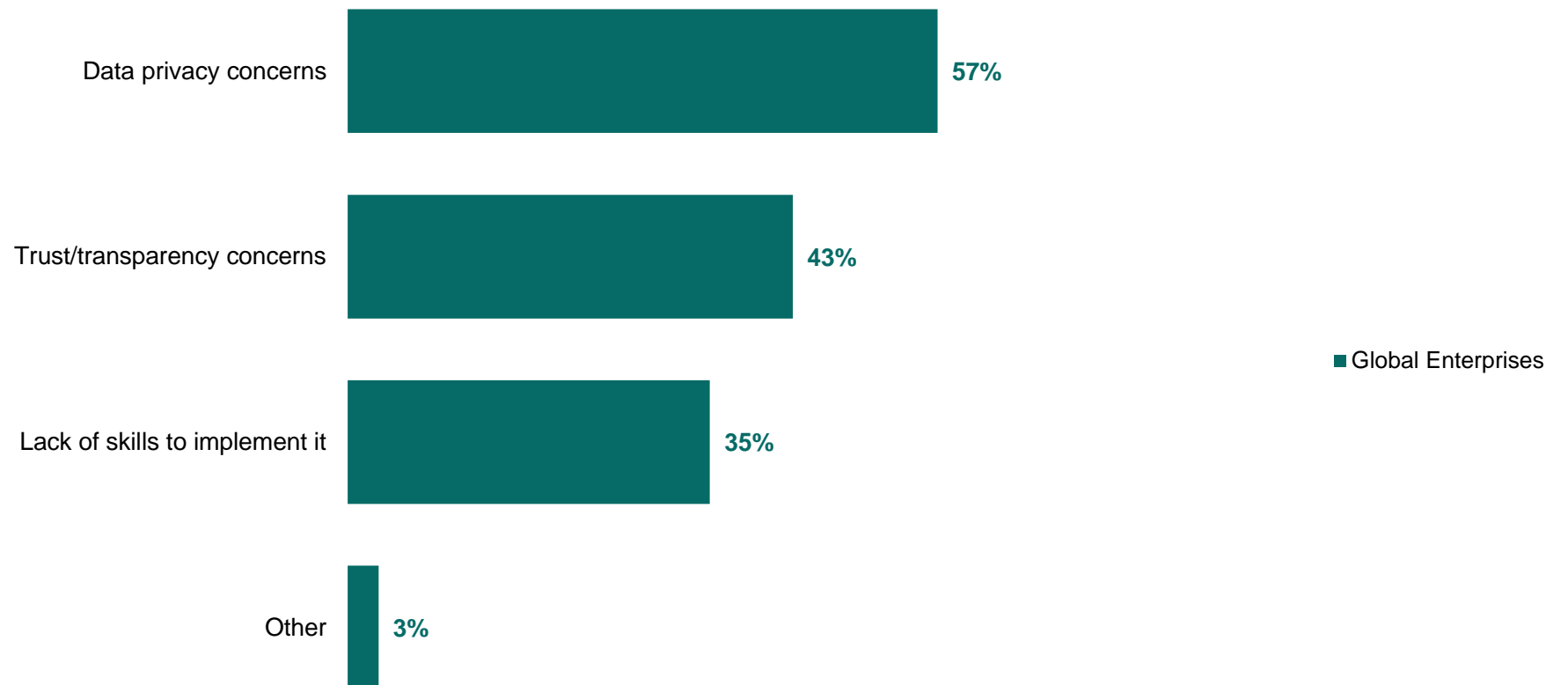
What, if anything, is hindering successful AI adoption for your business? Please select all that apply. **[Among IT Professionals at companies currently exploring or deploying AI]**



DRIVERS & BARRIERS OF AI

Data privacy concerns (57%) and trust/transparency concerns (43%) are the biggest inhibitors of generative AI according to IT Professionals at large organizations not exploring or implementing generative AI. 35% also say that lack of skills to implement it are a big inhibitor.

What are your organization's biggest inhibitors to adopting generative AI? Please select all that apply. **[Among IT Professionals at companies NOT exploring or implementing generative AI]**



AGENDA

AI ADOPTION & INVESTMENTS

DRIVERS & BARRIERS OF AI

CURRENT USES OF AI

AI ETHICS AND RESPONSIBILITY

AI'S IMPACT ON EMPLOYEES



## CURRENT USES OF AI

As AI takes on various roles within enterprises exploring or deploying the technology, the most common applications are IT process automation (33%) and security and threat detection (26%).

In which of the following ways, if any, is your organization using AI and automation today? Please select all that apply. **[Among IT Professionals at companies currently exploring or deploying AI]**

|  | Global Enterprise | Australia* | Canada | China | France | Germany | India | Italy* | Japan | Singapore | South Korea* | Spain* | UAE | UK  | US* | LATAM |
|--|-------------------|------------|--------|-------|--------|---------|-------|--------|-------|-----------|--------------|--------|-----|-----|-----|-------|
| Automation of IT Processes   | 33%               | 18%        | 30%    | 40%   | 21%    | 31%     | 52%   | 41%    | 21%   | 28%       | 30%          | 29%    | 42% | 26% | 19% | 36%   |
| Security and Threat Detection  | 26%               | 25%        | 22%    | 23%   | 18%    | 21%     | 36%   | 13%    | 29%   | 29%       | 20%          | 17%    | 33% | 26% | 26% | 33%   |
| AI Monitoring and Governance   | 25%               | 21%        | 20%    | 26%   | 21%    | 25%     | 38%   | 23%    | 24%   | 25%       | 28%          | 10%    | 25% | 23% | 23% | 29%   |
| Automate processing, understanding and flow of documents             | 24%               | 18%        | 16%    | 22%   | 21%    | 20%     | 32%   | 28%    | 31%   | 32%       | 25%          | 15%    | 27% | 21% | 16% | 21%   |
| Business Analytics or Intelligence                                   | 24%               | 29%        | 23%    | 22%   | 14%    | 19%     | 33%   | 27%    | 16%   | 36%       | 16%          | 20%    | 26% | 23% | 13% | 26%   |
| Automate customer/employee self-service answers and actions          | 23%               | 19%        | 18%    | 24%   | 14%    | 20%     | 34%   | 22%    | 19%   | 29%       | 18%          | 16%    | 25% | 23% | 19% | 25%   |
| Automation of Business Processes                                     | 22%               | 25%        | 21%    | 25%   | 15%    | 26%     | 26%   | 23%    | 20%   | 29%       | 19%          | 19%    | 24% | 20% | 18% | 18%   |
| Automation of Network Processes                                      | 22%               | 16%        | 17%    | 26%   | 14%    | 21%     | 34%   | 23%    | 17%   | 26%       | 19%          | 19%    | 23% | 16% | 16% | 24%   |
| Digital labor  | 22%               | 22%        | 16%    | 22%   | 18%    | 27%     | 21%   | 21%    | 10%   | 22%       | 22%          | 24%    | 23% | 18% | 19% | 39%   |
| Fraud Detection  | 22%               | 14%        | 24%    | 16%   | 16%    | 19%     | 32%   | 18%    | 19%   | 25%       | 6%           | 25%    | 28% | 23% | 21% | 29%   |
| Marketing and Sales  | 22%               | 19%        | 18%    | 19%   | 24%    | 21%     | 23%   | 17%    | 19%   | 24%       | 23%          | 7%     | 26% | 21% | 21% | 35%   |
| Search and Knowledge Discovery                                       | 21%               | 22%        | 18%    | 19%   | 9%     | 23%     | 31%   | 7%     | 21%   | 23%       | 25%          | 16%    | 24% | 17% | 18% | 24%   |
| Human Resources and Talent Acquisition                               | 19%               | 19%        | 18%    | 15%   | 12%    | 18%     | 28%   | 11%    | 15%   | 19%       | 13%          | 9%     | 25% | 25% | 23% | 24%   |
| Financial Planning and Analysis                                      | 18%               | 11%        | 17%    | 16%   | 15%    | 15%     | 29%   | 21%    | 13%   | 19%       | 13%          | 14%    | 23% | 16% | 14% | 22%   |
| Predictive Decision Making   | 18%               | 19%        | 18%    | 17%   | 14%    | 7%      | 21%   | 17%    | 19%   | 20%       | 20%          | 20%    | 15% | 15% | 17% | 22%   |
| Sensor Data Analysis (Internet of Things)                            | 18%               | 18%        | 16%    | 23%   | 12%    | 10%     | 24%   | 9%     | 21%   | 20%       | 18%          | 11%    | 22% | 16% | 12% | 22%   |
| Supply Chain Intelligence  | 18%               | 12%        | 18%    | 18%   | 13%    | 20%     | 21%   | 13%    | 10%   | 29%       | 11%          | 12%    | 17% | 18% | 19% | 22%   |
| Code generation  | 17%               | 16%        | 11%    | 18%   | 7%     | 15%     | 28%   | 12%    | 14%   | 20%       | 11%          | 15%    | 19% | 16% | 19% | 20%   |
| Visual Recognition   | 16%               | 21%        | 13%    | 18%   | 12%    | 14%     | 18%   | 10%    | 4%    | 16%       | 10%          | 15%    | 23% | 19% | 18% | 18%   |
| Sustainability   | 13%               | 10%        | 10%    | 12%   | 7%     | 9%      | 26%   | 11%    | 8%    | 19%       | 11%          | 10%    | 12% | 12% | 7%  | 16%   |
| Environmental Risk Analysis (extreme weather and climate disruption) | 12%               | 12%        | 10%    | 16%   | 2%     | 6%      | 23%   | 9%     | 10%   | 10%       | 5%           | 11%    | 13% | 12% | 9%  | 10%   |
| Healthcare Diagnostics   | 11%               | 7%         | 10%    | 17%   | 9%     | 9%      | 14%   | 11%    | 7%    | 8%        | 12%          | 1%     | 13% | 12% | 19% | 8%    |
| None of the above  | 4%                | 14%        | 7%     | 2%    | 3%     | 5%      | 0%    | 2%     | 5%    | 3%        | 2%           | 1%     | 0%  | 10% | 11% | 1%    |
| Other  | 0%                | 3%         | 1%     | 0%    | 0%     | 2%      | 0%    | 0%     | 0%    | 0%        | 0%           | 1%     | 0%  | 1%  | 0%  | 0%    |

Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/deploying AI: Global Enterprise = 1,914n, Australia = 73n, Canada = 125n, China = 272n, France = 107n, Germany = 117n, India = 184n, Italy = 82n, Japan = 135n, Singapore = 138n, South Korea = 83n, Spain = 80n, UAE = 151n, UK = 112n, US = 90n, LATAM = 165n

\*Sample size is between 50 and 99

Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

## CURRENT USES OF AI

Industries leverage AI and automation for sector-specific needs; for example, the healthcare sector is most likely to be using AI for healthcare diagnostics.

In which of the following ways, if any, is your organization using AI and automation today? Please select all that apply. **[Among IT Professionals at companies currently exploring or deploying AI]**

|   | Global Enterprise | Financial Services Industry | Telecommunications Industry* | Government Industry* | Energy, Environment, Utilities Industry* | Automotive Industry* | Industrial Industry | Healthcare Industry | Retail Industry* | Travel & Transportation Industry* |
|---|-------------------|-----------------------------|------------------------------|----------------------|--|----------------------|---------------------|---------------------|------------------|-----------------------------------|
| Automation of IT Processes                                  | 33%               | 35%                         | 31%                          | 18%                  | 18%                                      | 36%                  | 32%                 | 28%                 | 27%              | 21%                               |
| Security and Threat Detection                               | 26%               | 31%                         | 17%                          | 27%                  | 16%                                      | 18%                  | 28%                 | 24%                 | 23%              | 19%                               |
| AI Monitoring and Governance                                | 25%               | 35%                         | 29%                          | 20%                  | 27%                                      | 20%                  | 22%                 | 22%                 | 24%              | 14%                               |
| Automate processing, understanding and flow of documents    | 24%               | 25%                         | 24%                          | 21%                  | 13%                                      | 24%                  | 25%                 | 23%                 | 21%              | 11%                               |
| Business Analytics or Intelligence                          | 24%               | 27%                         | 23%                          | 18%                  | 16%                                      | 33%                  | 23%                 | 14%                 | 14%              | 28%                               |
| Automate customer/employee self-service answers and actions | 23%               | 31%                         | 25%                          | 18%                  | 18%                                      | 20%                  | 21%                 | 15%                 | 21%              | 28%                               |
| Automation of Business Processes                            | 22%               | 31%                         | 19%                          | 18%                  | 18%                                      | 27%                  | 27%                 | 10%                 | 16%              | 11%                               |
| Automation of Network Processes                             | 22%               | 28%                         | 20%                          | 16%                  | 22%                                      | 33%                  | 24%                 | 13%                 | 19%              | 16%                               |
| Digital labor   | 22%               | 25%                         | 25%                          | 13%                  | 18%                                      | 13%                  | 22%                 | 19%                 | 20%              | 9%                                |
| Fraud Detection   | 22%               | 36%                         | 30%                          | 20%                  | 20%                                      | 9%                   | 22%                 | 18%                 | 20%              | 21%                               |
| Marketing and Sales   | 22%               | 31%                         | 26%                          | 11%                  | 25%                                      | 15%                  | 23%                 | 18%                 | 20%              | 35%                               |
| Search and Knowledge Discovery                              | 21%               | 28%                         | 12%                          | 21%                  | 16%                                      | 13%                  | 26%                 | 19%                 | 14%              | 14%                               |
| Human Resources and Talent Acquisition                      | 19%               | 18%                         | 17%                          | 24%                  | 33%                                      | 13%                  | 18%                 | 25%                 | 16%              | 19%                               |
| Financial Planning and Analysis                             | 18%               | 36%                         | 14%                          | 20%                  | 15%                                      | 11%                  | 19%                 | 18%                 | 13%              | 16%                               |
| Predictive Decision Making                                  | 18%               | 25%                         | 14%                          | 11%                  | 22%                                      | 13%                  | 21%                 | 16%                 | 16%              | 19%                               |
| Sensor Data Analysis (Internet of Things)                   | 18%               | 18%                         | 15%                          | 17%                  | 13%                                      | 22%                  | 21%                 | 17%                 | 15%              | 9%                                |
| Supply Chain Intelligence                                   | 18%               | 16%                         | 17%                          | 6%                   | 20%                                      | 15%                  | 23%                 | 15%                 | 19%              | 18%                               |
| Code generation   | 17%               | 21%                         | 17%                          | 12%                  | 15%                                      | 16%                  | 18%                 | 14%                 | 14%              | 12%                               |
| Visual Recognition  | 16%               | 16%                         | 12%                          | 14%                  | 15%                                      | 13%                  | 17%                 | 21%                 | 16%              | 14%                               |
| Sustainability  | 13%               | 18%                         | 6%                           | 8%                   | 7%                                       | 9%                   | 14%                 | 7%                  | 11%              | 7%                                |
| Environmental Risk Analysis                                 | 12%               | 17%                         | 11%                          | 7%                   | 11%                                      | 5%                   | 21%                 | 10%                 | 11%              | 11%                               |
| Healthcare Diagnostics                                      | 11%               | 11%                         | 10%                          | 10%                  | 9%                                       | 5%                   | 12%                 | 36%                 | 4%               | 11%                               |
| None of the above   | 4%                | 6%                          | 5%                           | 6%                   | 0%                                       | 4%                   | 2%                  | 3%                  | 10%              | 2%                                |
| Other   | 0%                | 0%                          | 0%                           | 2%                   | 0%                                       | 0%                   | 0%                  | 1%                  | 0%               | 2%                                |

Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/deploying AI: Global Enterprise = 1,914n, Financial Services = 179n, Telecommunications = 84n, Government = 99n, Energy = 55n, Automotive = 55n, Industrial = 266n, Healthcare = 110n, Retail = 94n, Travel = 57n

\*Sample size is between 50 and 99; Note: Media & Entertainment, Chemicals/Oil/Gas, and Aerospace & Defense Industry samples sizes are too low to show

Note: : dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

## CURRENT USES OF AI

IT Professionals take the lead, emerging as the primary group engaging with AI within enterprises exploring or deploying AI (56%).

Which of the following groups, if any, at your organization are using AI today? Please select all that apply. [Among IT Professionals at companies currently exploring or deploying AI]

|  | Global Enterprise | Australia* | Canada | China | France | Germany | India | Italy* | Japan | Singapore | South Korea* | Spain* | UAE | UK  | US* | LATAM |
|--|-------------------|------------|--------|-------|--------|---------|-------|--------|-------|-----------|--------------|--------|-----|-----|-----|-------|
| IT professionals                                     | 56%               | 49%        | 54%    | 50%   | 23%    | 59%     | 76%   | 50%    | 43%   | 63%       | 54%          | 50%    | 72% | 57% | 48% | 62%   |
| Data engineers                                       | 33%               | 32%        | 26%    | 28%   | 21%    | 29%     | 45%   | 27%    | 33%   | 41%       | 39%          | 24%    | 46% | 32% | 24% | 37%   |
| Developers and data scientists                       | 31%               | 29%        | 29%    | 32%   | 22%    | 25%     | 38%   | 29%    | 30%   | 36%       | 35%          | 24%    | 42% | 29% | 22% | 31%   |
| Customer service professionals                       | 26%               | 26%        | 31%    | 22%   | 20%    | 31%     | 34%   | 22%    | 17%   | 27%       | 19%          | 13%    | 32% | 24% | 32% | 26%   |
| Security professionals                               | 24%               | 16%        | 22%    | 21%   | 24%    | 19%     | 30%   | 15%    | 21%   | 28%       | 25%          | 28%    | 26% | 17% | 22% | 30%   |
| Marketing professionals                              | 24%               | 15%        | 18%    | 24%   | 19%    | 23%     | 31%   | 23%    | 18%   | 26%       | 25%          | 15%    | 31% | 24% | 18% | 36%   |
| Finance professionals                                | 21%               | 15%        | 14%    | 21%   | 16%    | 17%     | 29%   | 21%    | 9%    | 33%       | 14%          | 10%    | 20% | 28% | 23% | 25%   |
| HR professionals                                     | 21%               | 15%        | 20%    | 22%   | 21%    | 19%     | 27%   | 12%    | 12%   | 27%       | 14%          | 14%    | 20% | 29% | 29% | 25%   |
| Product managers                                     | 21%               | 22%        | 18%    | 19%   | 16%    | 20%     | 27%   | 12%    | 19%   | 29%       | 22%          | 15%    | 21% | 30% | 19% | 18%   |
| Sales professionals                                  | 19%               | 21%        | 14%    | 26%   | 14%    | 15%     | 24%   | 12%    | 12%   | 22%       | 12%          | 10%    | 21% | 23% | 19% | 25%   |
| Sustainability professionals and operations managers | 18%               | 15%        | 15%    | 27%   | 11%    | 11%     | 24%   | 10%    | 15%   | 22%       | 24%          | 11%    | 19% | 17% | 14% | 16%   |
| External consultants                                 | 13%               | 11%        | 10%    | 19%   | 11%    | 15%     | 14%   | 11%    | 7%    | 15%       | 11%          | 15%    | 13% | 19% | 13% | 8%    |
| Site Reliability Engineers (SREs)                    | 11%               | 11%        | 8%     | 13%   | 4%     | 10%     | 15%   | 13%    | 8%    | 19%       | 7%           | 4%     | 9%  | 13% | 4%  | 13%   |
| Legal professionals                                  | 10%               | 11%        | 6%     | 17%   | 5%     | 8%      | 8%    | 4%     | 7%    | 9%        | 10%          | 5%     | 12% | 15% | 10% | 13%   |
| None of the above                                    | 5%                | 11%        | 10%    | 3%    | 5%     | 4%      | 1%    | 6%     | 4%    | 4%        | 1%           | 8%     | 1%  | 8%  | 12% | 2%    |
| Other  | 1%                | 4%         | 0%     | 0%    | 1%     | 1%      | 0%    | 0%     | 1%    | 0%        | 0%           | 1%     | 0%  | 1%  | 2%  | 0%    |

Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/deploying AI: Global Enterprise = 1,914n, Australia = 73n, Canada = 125n, China = 272n, France = 107n, Germany = 117n, India = 184n, Italy = 82n, Japan = 135n, Singapore = 138n, South Korea = 83n, Spain = 80n, UAE = 151n, UK = 112n, US = 90n, LATAM = 165n

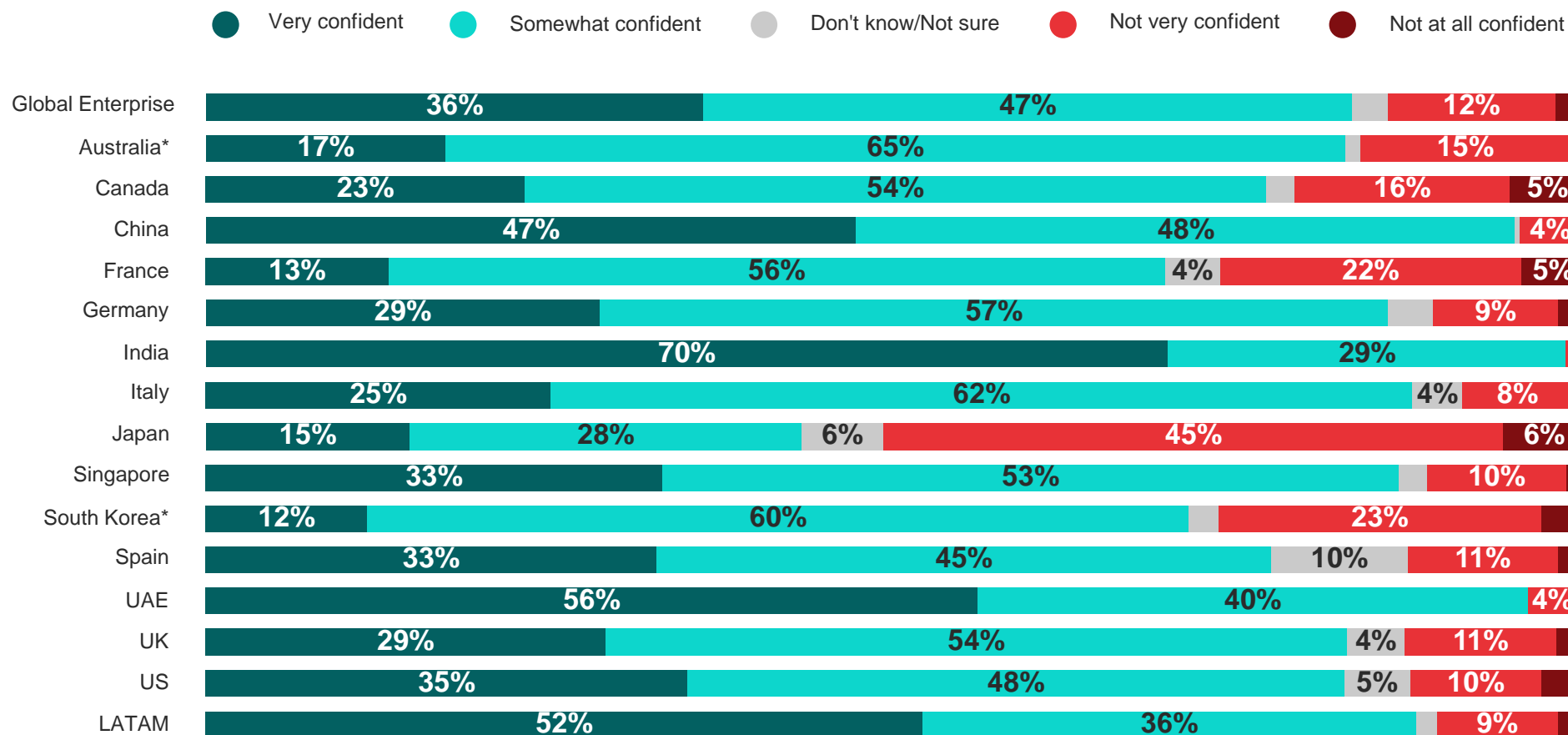
\*Sample size is between 50 and 99

Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

CURRENT USES OF AI

IT Professionals are confident that their enterprise has the right tools in place to find data across the business (83% confident), with 36% being very confident.

How confident are you that your company has the right tools in place to find data across the business so it can be organized, analyzed, and turned into useful insights?

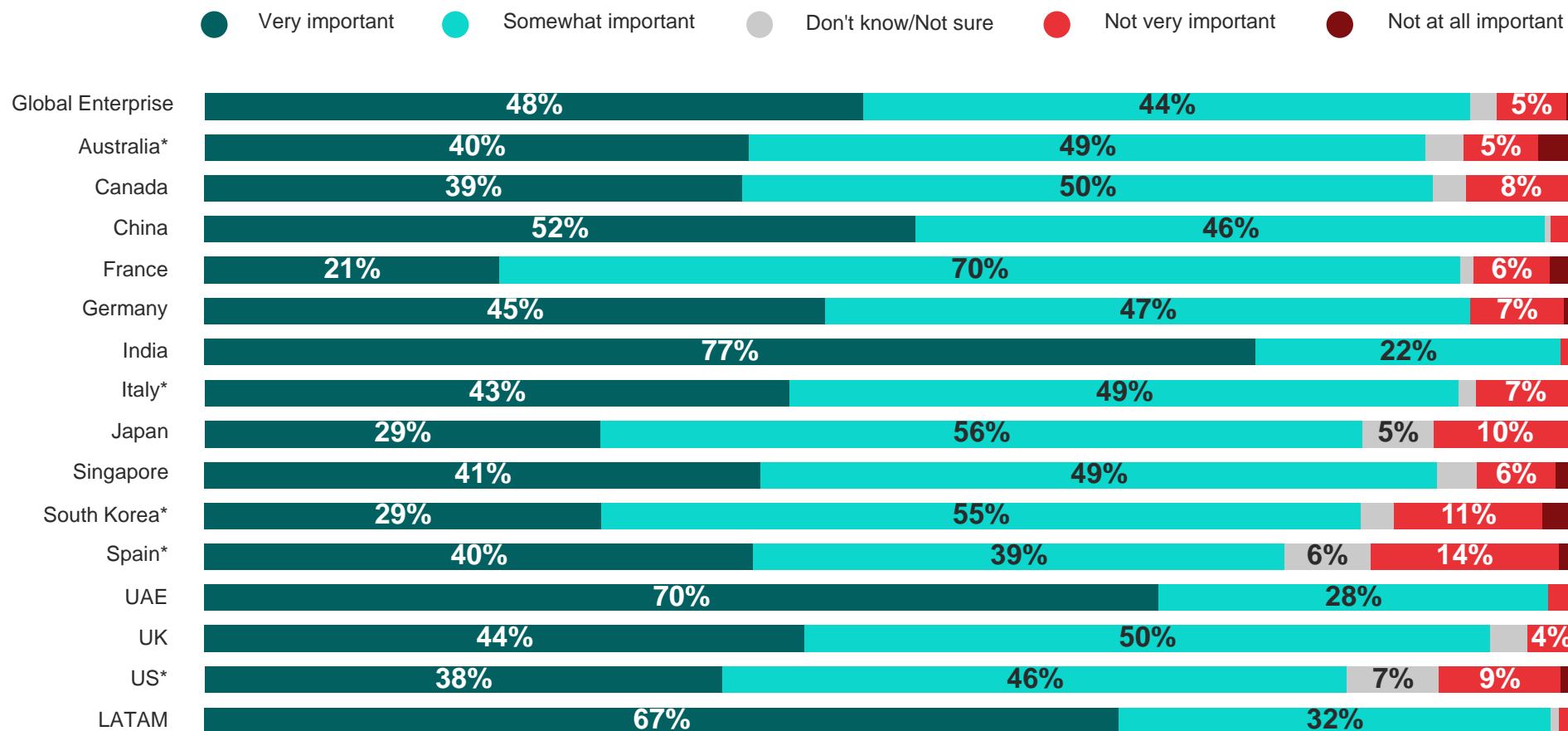


Base IT Professionals at Enterprises (organizations > 1,000 employees): Global Enterprise = 2,342n, Australia = 92n, Canada = 147n, China = 316n, France = 151n, Germany = 154n, India = 215n, Italy = 112n, Japan = 169n, Singapore = 148n, South Korea = 94n, Spain = 101n, UAE = 168n, UK = 145n, US = 126n, LATAM = 204n  
 \*Sample size is between 50 and 99

CURRENT USES OF AI

And according to 92% of IT Professionals at large organizations exploring or deploying AI, running AI projects wherever data resides is important, with 48% considering it very important.

How important is it to your company that you can build and run your AI projects wherever your data resides – on any public cloud, private cloud, or on-premises? **[Among IT Professionals at companies currently exploring or deploying AI]**



Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/deploying AI: Global Enterprise = 1,914n, Australia = 73n, Canada = 125n, China = 272n, France = 107n, Germany = 117n, India = 184n, Italy = 82n, Japan = 135n, Singapore = 138n, South Korea = 83n, Spain = 80n, UAE = 151n, UK = 112n, US = 90n, LATAM = 165n  
 \*Sample size is between 50 and 99



AGENDA

AI ADOPTION & INVESTMENTS

DRIVERS & BARRIERS OF AI

CURRENT USES OF AI

AI ETHICS AND RESPONSIBILITY

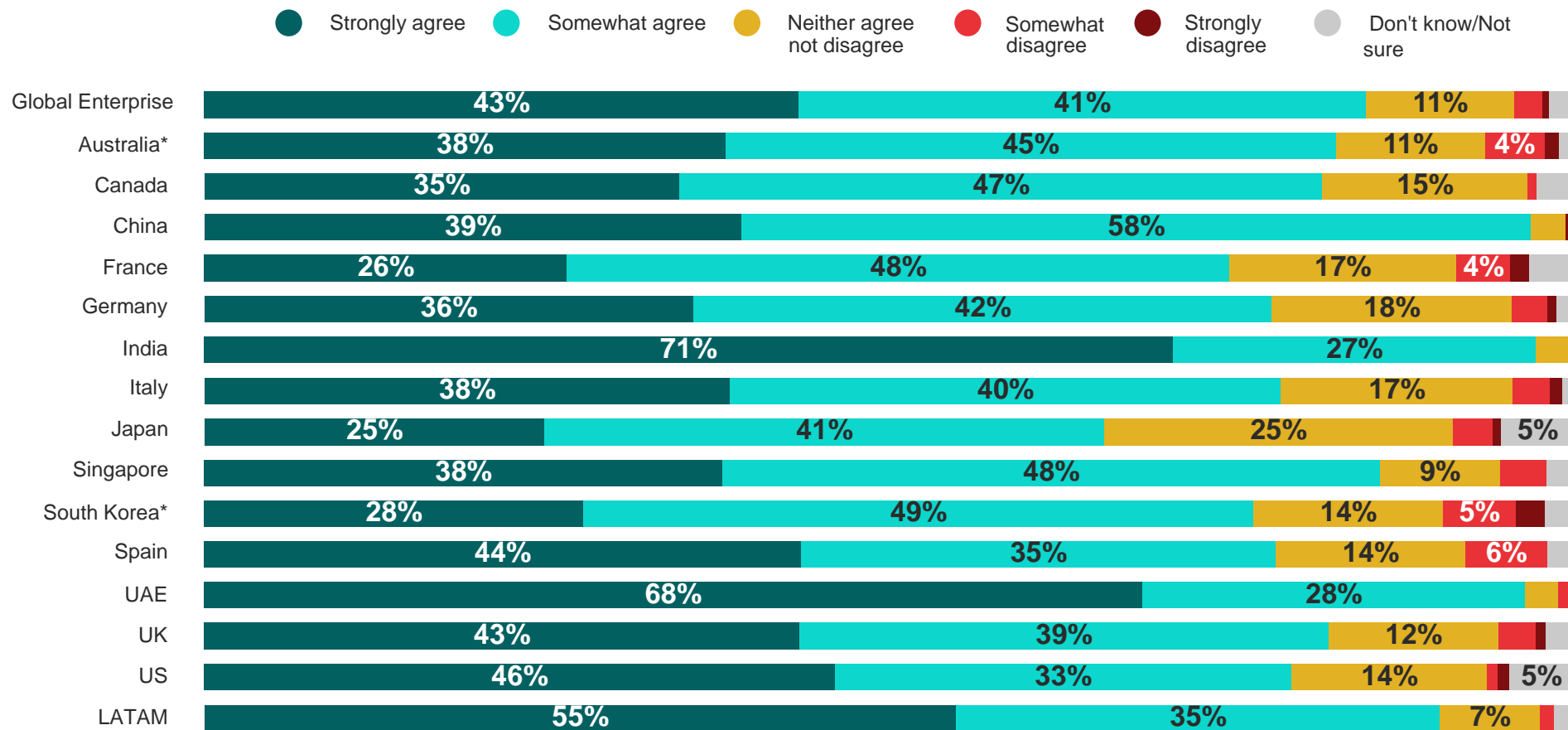
AI'S IMPACT ON EMPLOYEES



AI ETHICS AND RESPONSIBILITY

IT Professionals are largely in agreement that consumers are more likely to choose services from companies with transparent and ethical AI practices (84%).

How much do you agree or disagree with the following statement? Consumers are more likely to choose services of a company that offers transparency and an ethical framework for how its data and AI models are built, managed, and used.



Base IT Professionals at Enterprises (organizations > 1,000 employees): Global Enterprise = 2,342n, Australia = 92n, Canada = 147n, China = 316n, France = 151n, Germany = 154n, India = 215n, Italy = 112n, Japan = 169n, Singapore = 148n, South Korea = 94n, Spain = 101n, UAE = 168n, UK = 145n, US = 126n, LATAM = 204n  
 \*Sample size is between 50 and 99

## AI ETHICS AND RESPONSIBILITY

Enterprises value various aspects of trust and explainability in their AI operations.

How important are the following aspects of trust and explainability in AI to your business? [Among IT Professionals at companies currently exploring or deploying AI] [Showing Very + Somewhat important]

|   | Global Enterprise | Australia* | Canada | China | France | Germany | India | Italy* | Japan | Singapore | South Korea* | Spain* | UAE | UK  | US* | LATAM |
|---|-------------------|------------|--------|-------|--------|---------|-------|--------|-------|-----------|--------------|--------|-----|-----|-----|-------|
| Having the ability to monitor data and AI across the entire lifecycle   | 83%               | 82%        | 86%    | 86%   | 79%    | 79%     | 91%   | 85%    | 71%   | 83%       | 70%          | 66%    | 89% | 88% | 77% | 92%   |
| Having the ability to govern data and AI across the entire lifecycle    | 82%               | 79%        | 86%    | 85%   | 74%    | 75%     | 89%   | 72%    | 72%   | 83%       | 73%          | 73%    | 87% | 83% | 80% | 92%   |
| Maintaining the integrity of your brand and the trust of your customers | 82%               | 74%        | 88%    | 88%   | 77%    | 79%     | 87%   | 77%    | 73%   | 83%       | 69%          | 69%    | 90% | 87% | 74% | 91%   |
| Meeting external regulatory and compliance obligations                  | 82%               | 81%        | 88%    | 82%   | 75%    | 79%     | 89%   | 77%    | 76%   | 80%       | 72%          | 76%    | 89% | 86% | 76% | 92%   |
| Meeting internal reporting obligations                                  | 82%               | 77%        | 86%    | 85%   | 79%    | 74%     | 93%   | 73%    | 76%   | 78%       | 70%          | 74%    | 85% | 87% | 80% | 89%   |
| Ensuring your applications and services minimize bias                   | 79%               | 78%        | 81%    | 82%   | 69%    | 77%     | 88%   | 74%    | 64%   | 83%       | 69%          | 75%    | 89% | 81% | 77% | 85%   |

Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/deploying AI: Global Enterprise = 1,914n, Australia = 73n, Canada = 125n, China = 272n, France = 107n, Germany = 117n, India = 184n, Italy = 82n, Japan = 135n, Singapore = 138n, South Korea = 83n, Spain = 80n, UAE = 151n, UK = 112n, US = 90n, LATAM = 165n

\*Sample size is between 50 and 99

Note: dark green shading indicates the most important statements while light green shading indicates the least important statements within a specific market

## AI ETHICS AND RESPONSIBILITY

At enterprises using AI, over 80% of IT Professionals globally consider each aspect of trust and explainability in AI important to their enterprise.

How important are the following aspects of trust and explainability in AI to your business? [Among IT Professionals at companies currently DEPLOYING AI] [Showing Very + Somewhat important]

|   | Global Enterprise | Australia** | Canada* | China | France** | Germany* | India | Italy** | Japan* | Singapore* | South Korea** | Spain** | UAE* | UK* | US** | LATAM* |
|---|-------------------|-------------|---------|-------|----------|----------|-------|---------|--------|------------|---------------|---------|------|-----|------|--------|
| Having the ability to monitor data and AI across the entire lifecycle   | 88%               |             | 89%     | 96%   |          | 80%      | 95%   |         | 75%    | 79%        |               |         | 93%  | 94% |      | 94%    |
| Meeting external regulatory and compliance obligations                  | 87%               |             | 93%     | 91%   |          | 82%      | 91%   |         | 75%    | 81%        |               |         | 93%  | 94% |      | 94%    |
| Meeting internal reporting obligations                                  | 87%               |             | 93%     | 93%   |          | 80%      | 98%   |         | 81%    | 79%        |               |         | 89%  | 89% |      | 91%    |
| Maintaining the integrity of your brand and the trust of your customers | 87%               |             | 96%     | 94%   |          | 86%      | 92%   |         | 74%    | 85%        |               |         | 91%  | 91% |      | 90%    |
| Having the ability to govern data and AI across the entire lifecycle    | 87%               |             | 87%     | 94%   |          | 80%      | 93%   |         | 77%    | 82%        |               |         | 92%  | 87% |      | 93%    |
| Ensuring your applications and services minimize bias                   | 85%               |             | 82%     | 91%   |          | 86%      | 90%   |         | 65%    | 87%        |               |         | 90%  | 83% |      | 89%    |

Base IT Professionals at Enterprises (organizations > 1,000 employees) deploying AI: Global Enterprise = 984n, Canada = 55n, China = 157n, Germany = 50n, India = 126n, Japan = 57n, Singapore = 78n, UAE = 98n, UK = 53n, LATAM = 96n

\*Sample size is between 50 and 99; \*\*Australia, France, Italy, South Korea, Spain, and US samples sizes are too low to show

Note: dark green shading indicates the most important statements while light green shading indicates the least important statements within a specific market

## AI ETHICS AND RESPONSIBILITY

IT Professionals at enterprises only exploring AI prioritize brand integrity and customer trust more than ensuring their applications and services minimize bias.

How important are the following aspects of trust and explainability in AI to your business? [Among IT Professionals at companies EXPLORING AI]  
[Showing Very + Somewhat important]

|   | Global Enterprise | Australia** | Canada* | China | France* | Germany* | India* | Italy** | Japan* | Singapore* | South Korea** | Spain* | UAE* | UK* | US** | LATAM* |
|---|-------------------|-------------|---------|-------|---------|----------|--------|---------|--------|------------|---------------|--------|------|-----|------|--------|
| Having the ability to monitor data and AI across the entire lifecycle   | 78%               |             | 84%     | 71%   | 79%     | 78%      | 83%    |         | 68%    | 88%        |               | 58%    | 81%  | 81% |      | 90%    |
| Meeting external regulatory and compliance obligations                  | 77%               |             | 84%     | 70%   | 74%     | 78%      | 83%    |         | 76%    | 80%        |               | 67%    | 81%  | 78% |      | 88%    |
| Meeting internal reporting obligations                                  | 77%               |             | 81%     | 75%   | 78%     | 70%      | 83%    |         | 73%    | 77%        |               | 67%    | 77%  | 85% |      | 87%    |
| Maintaining the integrity of your brand and the trust of your customers | 77%               |             | 81%     | 79%   | 76%     | 75%      | 76%    |         | 72%    | 80%        |               | 60%    | 89%  | 83% |      | 93%    |
| Having the ability to govern data and AI across the entire lifecycle    | 77%               |             | 84%     | 74%   | 76%     | 72%      | 81%    |         | 68%    | 85%        |               | 63%    | 79%  | 80% |      | 91%    |
| Ensuring your applications and services minimize bias                   | 74%               |             | 80%     | 69%   | 71%     | 70%      | 84%    |         | 63%    | 78%        |               | 69%    | 87%  | 80% |      | 81%    |

Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring AI: Global Enterprise = 930n,, Canada = 70n, China = 115n, France = 68n, Germany = 67n, India = 58n, Japan = 78n, Singapore = 60n, Spain = 52n, UAE = 53n, UK = 59n, LATAM = 69n

\*Sample size is between 50 and 99; \*\*Australia, Italy, South Korea, and US samples sizes are too low to show

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## AI ETHICS AND RESPONSIBILITY

Safeguarding data privacy through the entire lifecycle (44%), monitoring AI across cloud and AI environments (44%), and developing ethical AI policies (44%) are the most common ways enterprises are ensuring trustworthy AI.

Which of the following steps, if any, is your organization taking to ensure your AI is trustworthy and responsible? Please select all that apply. [Among IT Professionals at companies currently exploring or deploying AI]

|   | Global Enterprise | Australia* | Canada | China | France | Germany | India | Italy* | Japan | Singapore | South Korea* | Spain* | UAE | UK  | US* | LATAM |
|---|-------------------|------------|--------|-------|--------|---------|-------|--------|-------|-----------|--------------|--------|-----|-----|-----|-------|
| Developing ethical AI policies  | 44%               | 55%        | 50%    | 41%   | 36%    | 38%     | 46%   | 49%    | 39%   | 55%       | 35%          | 36%    | 47% | 44% | 42% | 49%   |
| Monitoring AI across cloud and AI environments  | 44%               | 38%        | 39%    | 42%   | 32%    | 45%     | 65%   | 32%    | 28%   | 49%       | 40%          | 31%    | 53% | 45% | 39% | 50%   |
| Safeguarding data privacy through the entire lifecycle                                | 44%               | 55%        | 42%    | 38%   | 41%    | 44%     | 51%   | 48%    | 33%   | 51%       | 29%          | 29%    | 43% | 56% | 47% | 49%   |
| Making sure we can explain AI-powered decisions                                       | 41%               | 49%        | 46%    | 38%   | 37%    | 41%     | 52%   | 29%    | 34%   | 44%       | 30%          | 30%    | 42% | 40% | 43% | 42%   |
| Guarding against adversarial threats and potential incursions to keep systems healthy | 38%               | 29%        | 30%    | 43%   | 36%    | 42%     | 41%   | 35%    | 27%   | 39%       | 37%          | 28%    | 44% | 38% | 31% | 48%   |
| Tracking data provenance, changes in data and model versions                          | 37%               | 33%        | 29%    | 37%   | 34%    | 37%     | 46%   | 39%    | 32%   | 51%       | 35%          | 24%    | 39% | 40% | 39% | 35%   |
| Tracking performance variations/model drift   | 32%               | 41%        | 34%    | 30%   | 25%    | 30%     | 44%   | 22%    | 20%   | 39%       | 30%          | 25%    | 28% | 33% | 33% | 38%   |
| Reducing unintended bias  | 27%               | 37%        | 26%    | 28%   | 17%    | 28%     | 36%   | 9%     | 23%   | 47%       | 12%          | 22%    | 30% | 30% | 22% | 24%   |
| None of the above   | 3%                | 5%         | 5%     | 1%    | 5%     | 3%      | 0%    | 2%     | 9%    | 1%        | 5%           | 5%     | 0%  | 3%  | 10% | 1%    |
| Other   | 0%                | 0%         | 0%     | 0%    | 0%     | 1%      | 0%    | 0%     | 1%    | 1%        | 0%           | 1%     | 0%  | 0%  | 1%  | 0%    |

Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/deploying AI : Global Enterprise = 1,914n, Australia = 73n, Canada = 125n, China = 272n, France = 107n, Germany = 117n, India = 184n, Italy = 82n, Japan = 135n, Singapore = 138n, South Korea = 83n, Spain = 80n, UAE = 112n, US = 90n, LATAM = 165n  
 \*Sample size is between 50 and 99

Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

## AI ETHICS AND RESPONSIBILITY

# Enterprises deploying AI are most likely to monitor AI activities across cloud and AI environments (51%) to uphold trust in AI.

Which of the following steps, if any, is your organization taking to ensure your AI is trustworthy and responsible? Please select all that apply. **[Among IT Professionals at companies currently DEPLOYING AI]**

|   | Global Enterprise | Australia** | Canada* | China | France** | Germany* | India | Italy** | Japan* | Singapore* | South Korea** | Spain** | UAE* | UK* | US** | LATAM* |
|---|-------------------|-------------|---------|-------|----------|----------|-------|---------|--------|------------|---------------|---------|------|-----|------|--------|
| Monitoring AI across cloud and AI environments  | 51%               |             | 49%     | 48%   |          | 54%      | 64%   |         | 44%    | 59%        |               |         | 52%  | 47% |      | 55%    |
| Safeguarding data privacy through the entire lifecycle                                | 47%               |             | 51%     | 40%   |          | 48%      | 52%   |         | 35%    | 58%        |               |         | 42%  | 60% |      | 47%    |
| Developing ethical AI policies  | 46%               |             | 42%     | 46%   |          | 40%      | 44%   |         | 37%    | 54%        |               |         | 45%  | 43% |      | 56%    |
| Making sure we can explain AI-powered decisions                                       | 45%               |             | 47%     | 42%   |          | 46%      | 54%   |         | 44%    | 53%        |               |         | 37%  | 40% |      | 52%    |
| Guarding against adversarial threats and potential incursions to keep systems healthy | 43%               |             | 38%     | 47%   |          | 46%      | 46%   |         | 32%    | 45%        |               |         | 46%  | 34% |      | 52%    |
| Tracking data provenance, changes in data and model versions                          | 41%               |             | 36%     | 43%   |          | 42%      | 45%   |         | 46%    | 56%        |               |         | 38%  | 43% |      | 35%    |
| Tracking performance variations/model drift   | 38%               |             | 35%     | 31%   |          | 30%      | 52%   |         | 30%    | 44%        |               |         | 31%  | 47% |      | 41%    |
| Reducing unintended bias  | 30%               |             | 24%     | 31%   |          | 30%      | 37%   |         | 25%    | 51%        |               |         | 31%  | 34% |      | 24%    |
| None of the above   | 2%                |             | 4%      | 3%    |          | 2%       | 0%    |         | 7%     | 3%         |               |         | 0%   | 0%  |      | 1%     |
| Other   | 0%                |             | 0%      | 0%    |          | 2%       | 0%    |         | 2%     | 0%         |               |         | 0%   | 0%  |      | 0%     |

Base IT Professionals at Enterprises (organizations > 1,000 employees) deploying AI: Global Enterprise = 984n, Canada = 55n, China = 157n, Germany = 50n, India = 126n, Japan = 57n, Singapore = 78n, UAE = 98n, UK = 53n, LATAM = 96n

\*Sample size is between 50 and 99; \*\*Australia, France, Italy, South Korea, Spain, and US samples sizes are too low to show

Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

## AI ETHICS AND RESPONSIBILITY

Enterprises exploring AI are most likely to be developing ethical AI policies (42%) and safeguarding data privacy through the entire lifecycle (40%) to ensure trustworthy AI.

Which of the following steps, if any, is your organization taking to ensure your AI is trustworthy and responsible? Please select all that apply. **[Among IT Professionals at companies EXPLORING AI]**

|   | Global Enterprise | Australia** | Canada* | China | France* | Germany* | India* | Italy** | Japan* | Singapore* | South Korea** | Spain* | UAE* | UK* | US** | LATAM* |
|---|-------------------|-------------|---------|-------|---------|----------|--------|---------|--------|------------|---------------|--------|------|-----|------|--------|
| Developing ethical AI policies  | 42%               |             | 56%     | 34%   | 28%     | 37%      | 52%    |         | 40%    | 57%        |               | 33%    | 51%  | 44% |      | 39%    |
| Safeguarding data privacy through the entire lifecycle                                | 40%               |             | 34%     | 35%   | 35%     | 40%      | 50%    |         | 32%    | 42%        |               | 21%    | 45%  | 53% |      | 52%    |
| Making sure we can explain AI-powered decisions                                       | 36%               |             | 46%     | 31%   | 31%     | 37%      | 48%    |         | 27%    | 33%        |               | 27%    | 53%  | 41% |      | 29%    |
| Monitoring AI across cloud and AI environments  | 36%               |             | 31%     | 34%   | 28%     | 39%      | 66%    |         | 17%    | 35%        |               | 27%    | 55%  | 42% |      | 43%    |
| Tracking data provenance, changes in data and model versions                          | 33%               |             | 23%     | 28%   | 35%     | 33%      | 47%    |         | 22%    | 43%        |               | 27%    | 42%  | 37% |      | 35%    |
| Guarding against adversarial threats and potential incursions to keep systems healthy | 33%               |             | 24%     | 37%   | 32%     | 39%      | 31%    |         | 23%    | 32%        |               | 25%    | 40%  | 41% |      | 43%    |
| Tracking performance variations/model drift   | 26%               |             | 33%     | 28%   | 21%     | 30%      | 28%    |         | 13%    | 33%        |               | 15%    | 25%  | 20% |      | 33%    |
| Reducing unintended bias  | 25%               |             | 29%     | 24%   | 18%     | 27%      | 33%    |         | 22%    | 42%        |               | 17%    | 30%  | 27% |      | 23%    |
| None of the above   | 4%                |             | 6%      | 0%    | 6%      | 3%       | 0%     |         | 10%    | 0%         |               | 6%     | 0%   | 5%  |      | 1%     |
| Other   | 0%                |             | 0%      | 0%    | 0%      | 0%       | 0%     |         | 1%     | 2%         |               | 0%     | 0%   | 0%  |      | 0%     |

Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring AI: Global Enterprise = 930n, Canada = 70n, China = 115n, France = 68n, Germany = 67n, India = 58n, Japan = 78n, Singapore = 60n, Spain = 52n, UAE = 53n, UK = 59n, LATAM = 69n

\*Sample size is between 50 and 99; \*\*Australia, Italy, South Korea, and US samples sizes are too low to show

Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market



## AI ETHICS AND RESPONSIBILITY

In the pursuit of transparent and explainable AI, enterprises grapple with various challenges like inadequate skill sets (52%) and the lack of an AI strategy (51%).

How much of a barrier are the following in developing AI that is explainable and trustworthy? [Among IT Professionals at companies currently exploring or deploying AI] [Showing Large + Medium Barrier]

|  | Global Enterprise | Australia* | Canada | China | France | Germany | India | Italy* | Japan | Singapore | South Korea* | Spain* | UAE | UK  | US* | LATAM |
|--|-------------------|------------|--------|-------|--------|---------|-------|--------|-------|-----------|--------------|--------|-----|-----|-----|-------|
| Lack of skills/training to develop and manage trustworthy AI                     | 52%               | 60%        | 54%    | 31%   | 56%    | 54%     | 54%   | 49%    | 50%   | 59%       | 52%          | 64%    | 53% | 66% | 60% | 55%   |
| Lack of an AI strategy   | 51%               | 47%        | 53%    | 40%   | 53%    | 52%     | 57%   | 48%    | 47%   | 57%       | 51%          | 49%    | 54% | 62% | 54% | 54%   |
| AI governance and management tools that do not work across all data environments | 50%               | 60%        | 59%    | 36%   | 52%    | 49%     | 55%   | 50%    | 39%   | 50%       | 45%          | 54%    | 49% | 65% | 53% | 53%   |
| AI outcomes that are not explainable   | 50%               | 58%        | 59%    | 40%   | 50%    | 45%     | 55%   | 55%    | 45%   | 54%       | 48%          | 48%    | 47% | 56% | 57% | 55%   |
| Lack of company guidelines for developing trustworthy, ethical AI                | 49%               | 59%        | 54%    | 31%   | 55%    | 48%     | 55%   | 48%    | 45%   | 49%       | 37%          | 46%    | 52% | 66% | 53% | 50%   |
| Lack of regulatory guidance from governments or industry                         | 49%               | 51%        | 53%    | 43%   | 49%    | 39%     | 54%   | 50%    | 40%   | 50%       | 49%          | 54%    | 48% | 56% | 53% | 59%   |
| AI vendors who don't include explainability features                             | 47%               | 42%        | 41%    | 40%   | 54%    | 52%     | 51%   | 46%    | 36%   | 48%       | 42%          | 48%    | 49% | 57% | 44% | 56%   |
| Building models on data that has inherent bias (social, economic, etc.)          | 46%               | 52%        | 47%    | 35%   | 48%    | 44%     | 54%   | 39%    | 40%   | 49%       | 47%          | 46%    | 52% | 53% | 38% | 48%   |

Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/deploying AI: Global Enterprise = 1,914n, Australia = 73n, Canada = 125n, China = 272n, France = 107n, Germany = 117n, India = 184n, Italy = 82n, Japan = 135n, Singapore = 138n, South Korea = 83n, Spain = 80n, UAE = 151n, UK = 112n, US = 90n, LATAM = 165n

\*Sample size is between 50 and 99

Note: dark green shading indicates the biggest perceived barriers while light green shading indicates the lesser barriers within a specific market

## AI ETHICS AND RESPONSIBILITY

Lack of skills to develop and manage trustworthy AI (49%) is one of the largest barriers that enterprises deploying AI face in developing trustworthy AI.

How much of a barrier are the following in developing AI that is explainable and trustworthy? **[Among IT Professionals at companies currently DEPLOYING AI] [Showing Large + Medium Barrier]**

|  | Global Enterprise | Australia** | Canada* | China | France** | Germany* | India | Italy** | Japan* | Singapore* | South Korea** | Spain** | UAE* | UK* | US** | LATAM* |
|--|-------------------|-------------|---------|-------|----------|----------|-------|---------|--------|------------|---------------|---------|------|-----|------|--------|
| Lack of skills/training to develop and manage trustworthy AI                     | 49%               |             | 44%     | 27%   |          | 56%      | 51%   |         | 51%    | 62%        |               |         | 48%  | 70% |      | 49%    |
| AI outcomes that are not explainable   | 47%               |             | 53%     | 37%   |          | 48%      | 54%   |         | 42%    | 54%        |               |         | 39%  | 64% |      | 49%    |
| Lack of an AI strategy   | 46%               |             | 29%     | 34%   |          | 50%      | 53%   |         | 39%    | 58%        |               |         | 45%  | 68% |      | 49%    |
| Lack of regulatory guidance from governments or industry                         | 46%               |             | 49%     | 34%   |          | 42%      | 56%   |         | 37%    | 45%        |               |         | 43%  | 55% |      | 55%    |
| AI governance and management tools that do not work across all data environments | 45%               |             | 44%     | 30%   |          | 48%      | 52%   |         | 35%    | 47%        |               |         | 42%  | 68% |      | 49%    |
| Lack of company guidelines for developing trustworthy, ethical AI                | 44%               |             | 44%     | 25%   |          | 48%      | 52%   |         | 44%    | 41%        |               |         | 46%  | 68% |      | 45%    |
| Building models on data that has inherent bias (social, economic, etc.)          | 43%               |             | 31%     | 30%   |          | 46%      | 52%   |         | 40%    | 53%        |               |         | 47%  | 57% |      | 44%    |
| AI vendors who don't include explainability features                             | 43%               |             | 31%     | 32%   |          | 48%      | 47%   |         | 33%    | 47%        |               |         | 45%  | 66% |      | 50%    |

Base IT Professionals at Enterprises (organizations > 1,000 employees) deploying AI: Global Enterprise = 984n, Canada = 55n, China = 157n, Germany = 50n, India = 126n, Japan = 57n, Singapore = 78n, UAE = 98n, UK = 53n, LATAM = 96n

\*Sample size is between 50 and 99; \*\*Australia, France, Italy, South Korea, Spain, and US samples sizes are too low to show

Note: dark green shading indicates the biggest perceived barriers while light green shading indicates the lesser barriers within a specific market

## AI ETHICS AND RESPONSIBILITY

Enterprises exploring AI are more likely than companies already deploying AI to face various challenges in trustworthy AI development.

How much of a barrier are the following in developing AI that is explainable and trustworthy? **[Among IT Professionals at companies EXPLORING AI]**  
**[Showing Large + Medium Barrier]**

|  | Global Enterprise | Australia** | Canada* | China | France* | Germany* | India* | Italy** | Japan* | Singapore* | South Korea | Spain* | UAE* | UK* | US** | LATAM* |
|--|-------------------|-------------|---------|-------|---------|----------|--------|---------|--------|------------|-------------|--------|------|-----|------|--------|
| Lack of an AI strategy   | 57%               |             | 71%     | 47%   | 56%     | 54%      | 64%    |         | 53%    | 55%        |             | 60%    | 70%  | 58% |      | 61%    |
| Lack of skills/training to develop and manage trustworthy AI                     | 56%               |             | 61%     | 37%   | 57%     | 52%      | 60%    |         | 50%    | 55%        |             | 73%    | 62%  | 63% |      | 64%    |
| AI governance and management tools that do not work across all data environments | 55%               |             | 71%     | 43%   | 56%     | 49%      | 60%    |         | 42%    | 53%        |             | 60%    | 62%  | 63% |      | 59%    |
| Lack of company guidelines for developing trustworthy, ethical AI                | 54%               |             | 61%     | 39%   | 53%     | 48%      | 62%    |         | 46%    | 60%        |             | 46%    | 62%  | 64% |      | 58%    |
| AI outcomes that are not explainable   | 53%               |             | 64%     | 43%   | 51%     | 43%      | 57%    |         | 47%    | 53%        |             | 50%    | 62%  | 49% |      | 62%    |
| Lack of regulatory guidance from governments or industry                         | 53%               |             | 56%     | 56%   | 50%     | 37%      | 52%    |         | 42%    | 57%        |             | 56%    | 57%  | 58% |      | 64%    |
| AI vendors who don't include explainability features                             | 51%               |             | 49%     | 50%   | 57%     | 55%      | 59%    |         | 37%    | 48%        |             | 50%    | 57%  | 49% |      | 64%    |
| Building models on data that has inherent bias (social, economic, etc.)          | 49%               |             | 60%     | 42%   | 56%     | 43%      | 59%    |         | 40%    | 43%        |             | 50%    | 60%  | 49% |      | 55%    |

Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring AI: Global Enterprise = 930n, Canada = 70n, China = 115n, France = 68n, Germany = 67n, India = 58n, Japan = 78n, Singapore = 60n, Spain = 52n, UAE = 53n, UK = 59n, LATAM = 69n

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AGENDA

AI ADOPTION & INVESTMENTS

DRIVERS & BARRIERS OF AI

CURRENT USES OF AI

AI ETHICS AND RESPONSIBILITY

AI'S IMPACT ON EMPLOYEES



## AI'S IMPACT ON EMPLOYEES

AI and automation are more likely to have various positive impacts on employees, with just around a third of IT Professionals reporting that their enterprise is training employees to collaborate with new AI and automation software (34%) and that employees are excited to work with new AI and automation software/tools (31%).

Which of the following describes how the use of AI and automation is impacting employees at your organization? Please select all that apply.

|  | Global Enterprise | Australia* | Canada | China | France | Germany | India | Italy | Japan | Singapore | South Korea* | Spain | UAE | UK  | US  | LATAM |
|--|-------------------|------------|--------|-------|--------|---------|-------|-------|-------|-----------|--------------|-------|-----|-----|-----|-------|
| My organization is training/reskilling employees to work together with new AI and automation software/tools.                       | 34%               | 29%        | 25%    | 34%   | 16%    | 29%     | 46%   | 25%   | 31%   | 44%       | 40%          | 29%   | 43% | 32% | 30% | 38%   |
| Employees at my organization are excited to work with new AI and automation software/tools.  | 31%               | 22%        | 31%    | 39%   | 23%    | 18%     | 51%   | 22%   | 21%   | 32%       | 41%          | 22%   | 41% | 24% | 17% | 36%   |
| My organization is using AI and automation software/tools to advance how employees work and expand the job functions they perform. | 31%               | 22%        | 22%    | 38%   | 18%    | 34%     | 42%   | 18%   | 26%   | 40%       | 43%          | 22%   | 40% | 21% | 30% | 27%   |
| Employees at my organization are saving time with new AI and automation software/tools.  | 29%               | 26%        | 22%    | 30%   | 19%    | 23%     | 47%   | 22%   | 29%   | 39%       | 20%          | 20%   | 43% | 21% | 23% | 29%   |
| My organization is now able to help perform core job functions with new AI and automation software/tools.                          | 24%               | 27%        | 24%    | 28%   | 11%    | 19%     | 39%   | 15%   | 18%   | 34%       | 24%          | 9%    | 29% | 23% | 17% | 26%   |
| My organization does not have employees with the right skills to use new AI and automation software/tools.                         | 20%               | 23%        | 21%    | 21%   | 21%    | 21%     | 18%   | 18%   | 30%   | 15%       | 14%          | 17%   | 18% | 24% | 20% | 16%   |
| Employees at my organization are hesitant to work with new AI and automation software/tools.                                       | 19%               | 24%        | 20%    | 20%   | 17%    | 20%     | 26%   | 18%   | 11%   | 16%       | 17%          | 13%   | 20% | 23% | 24% | 12%   |
| My organization cannot find new hires with the right skills to work with new AI and automation software/tools.                     | 16%               | 13%        | 17%    | 22%   | 10%    | 15%     | 13%   | 6%    | 20%   | 16%       | 12%          | 10%   | 22% | 19% | 14% | 12%   |
| None of the above  | 5%                | 7%         | 10%    | 3%    | 6%     | 3%      | 0%    | 4%    | 13%   | 2%        | 2%           | 6%    | 1%  | 8%  | 16% | 3%    |
| Other  | 1%                | 0%         | 1%     | 0%    | 1%     | 2%      | 0%    | 0%    | 1%    | 0%        | 1%           | 3%    | 0%  | 1%  | 0%  | 0%    |

Base IT Professionals at Enterprises (organizations > 1,000 employees): Global Enterprise = 2,342n, Australia = 92n, Canada = 147n, China = 316n, France = 151n, Germany = 154n, India = 215n, Italy = 112n, Japan = 169n, Singapore = 148n, South Korea = 94n, Spain = 101n, UAE = 168n, UK = 145n, US = 126n, LATAM = 204n

\*Sample size is between 50 and 99

Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

## AI'S IMPACT ON EMPLOYEES

25% of IT Professionals at organizations exploring or deploying AI say that labor/skills shortages are helping to drive AI adoption at their companies. Companies are most likely to address this issue by using automation tools to reduce manual or repetitive tasks (55%) and by using AI to automate customer self-service answers and actions (47%).

How is your organization using AI and automation to address labor or skills shortages? Please select all that apply. **[Among IT Professionals at companies exploring or deploying AI that say labor and skills shortages help drive AI adoption at their organization]**

|  | Global Enterprise | China* | India* | Japan* |
|--|-------------------|--------|--------|--------|
| Using automation tools to reduce manual or repetitive tasks  | 55%               | 47%    | 63%    | 45%    |
| Using AI to automate customer self-service answers and actions   | 47%               | 37%    | 63%    | 31%    |
| Using AI-powered education solutions to increase employee learning and training                          | 42%               | 42%    | 52%    | 39%    |
| Using AI to improve recruiting and human resources   | 41%               | 46%    | 56%    | 20%    |
| Using low-code/no-code tools to address skills gaps  | 35%               | 41%    | 37%    | 20%    |
| Using AI to automate discovery of information in documents and other natural language text/audio sources | 33%               | 31%    | 44%    | 28%    |
| None of the above  | 3%                | 5%     | 0%     | 14%    |
| Other  | 1%                | 0%     | 0%     | 5%     |

Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/deploying AI that say labor/skills shortages help drive AI adoption at their enterprise: Global Enterprise = 488n, China = 59n, India = 52n, Japan = 64n

\*Sample size is between 50 and 99; Note: Australia, Canada, France, Germany, Italy, Singapore, South Korea, Spain, UAE, UK, US, and LATAM sample sizes are too low to show

Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

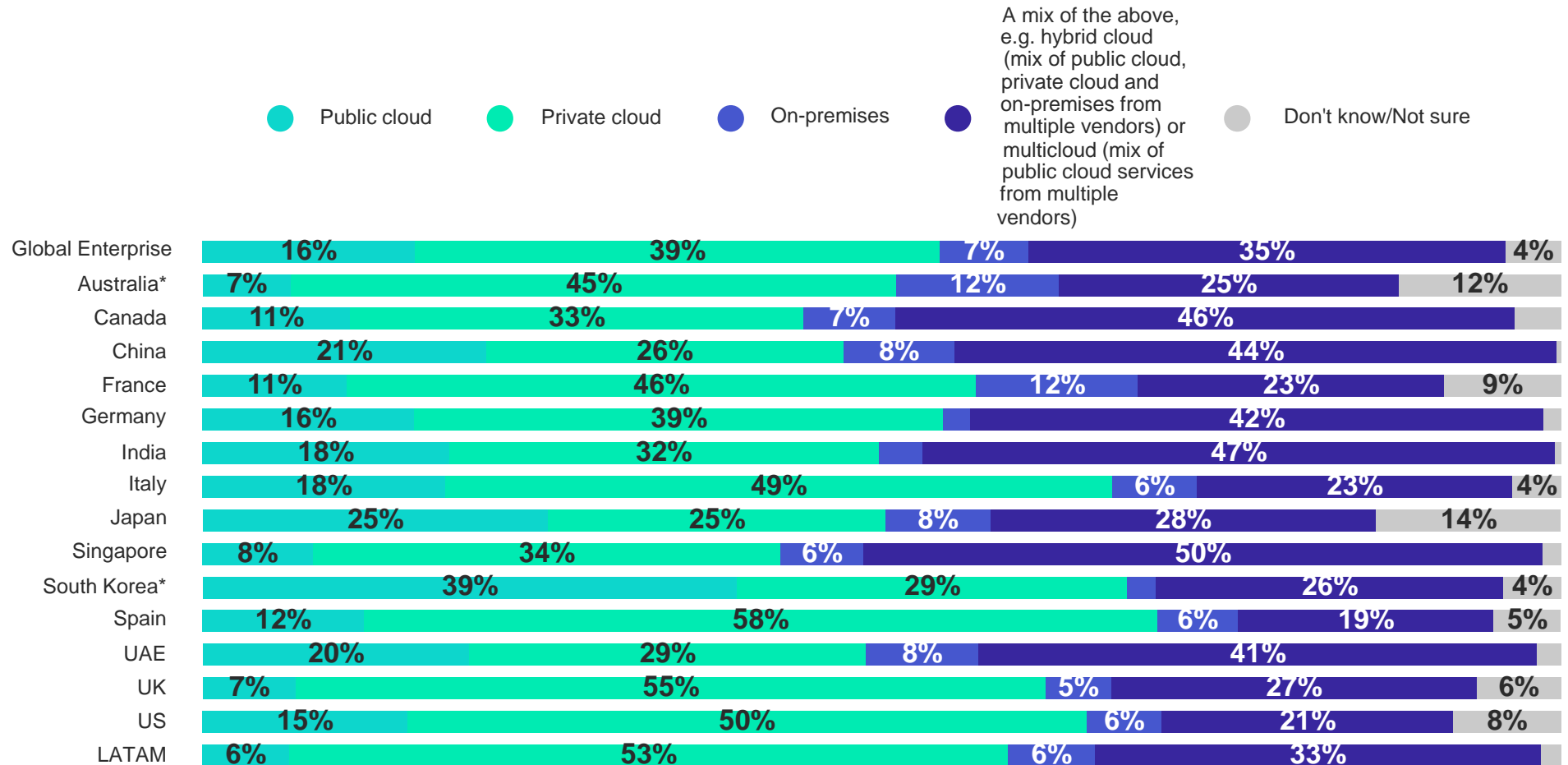
IBM GLOBAL AI ADOPTION INDEX

# APPENDIX



## Globally, enterprises are most likely to be using a private cloud environment (39%).

What is your company's current data/cloud environment?

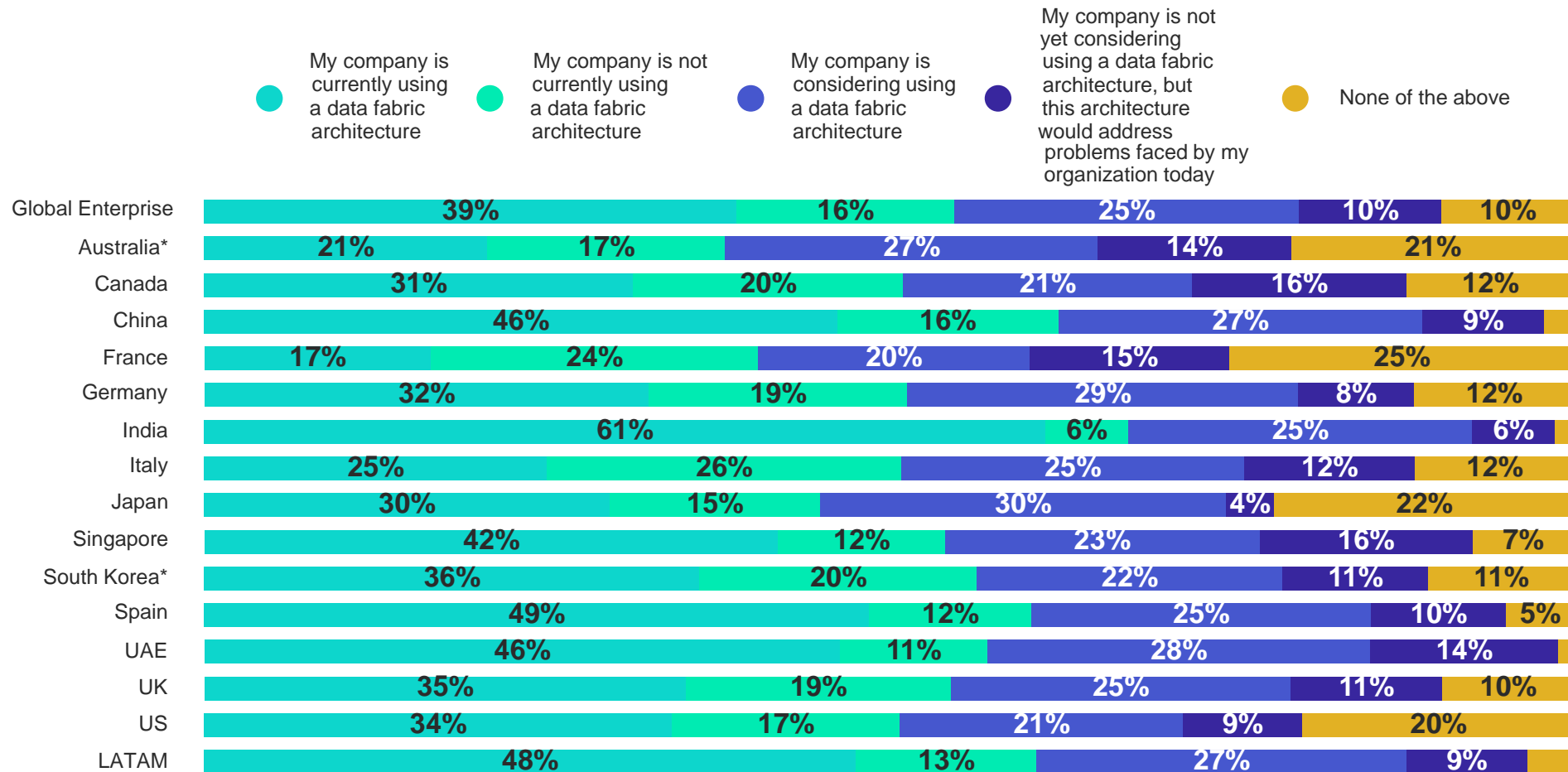




APPENDIX

39% of IT Professionals report that their enterprise is currently using a data fabric architecture, while 25% are considering using a data fabric architecture.

To the best of your knowledge, which of the following best describes your company's usage of a data fabric architecture?

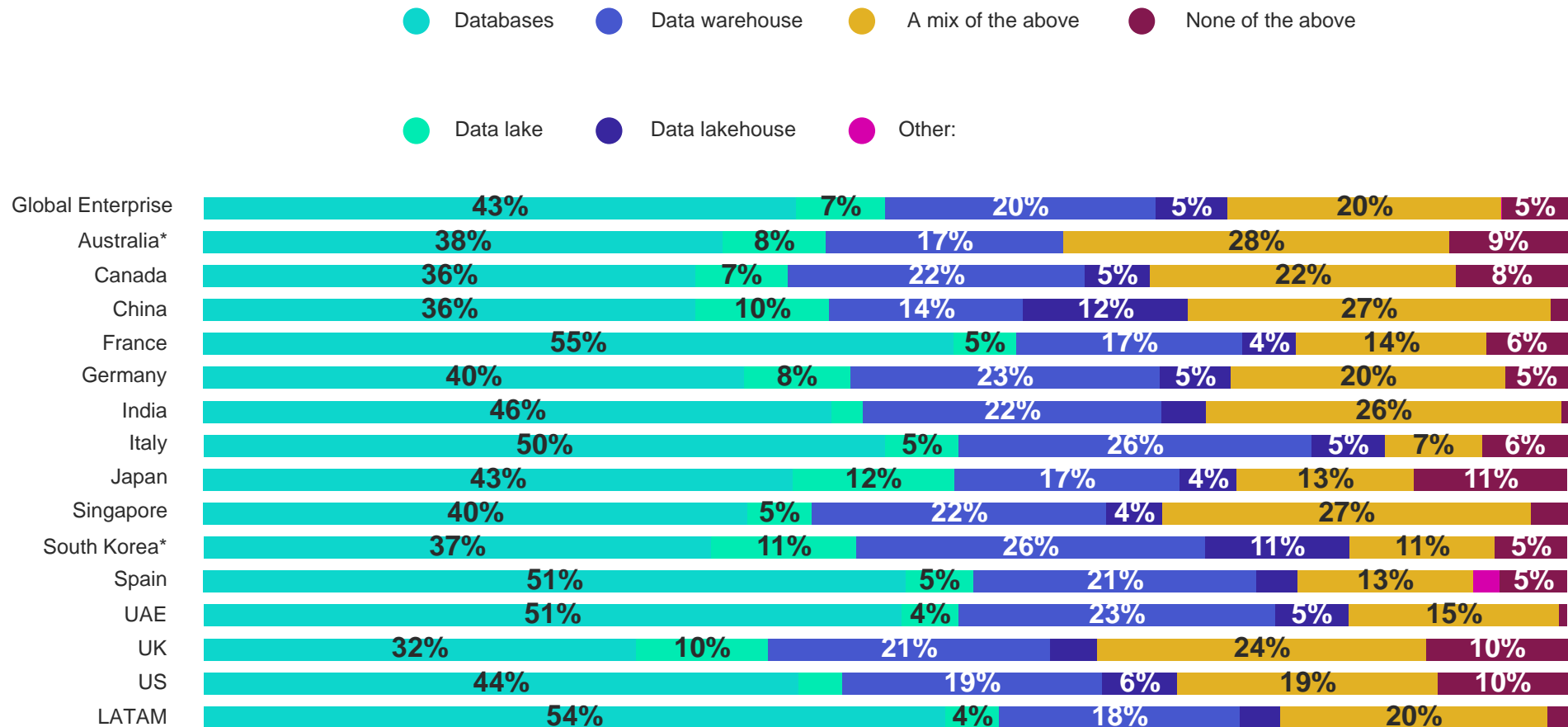


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 \*Sample size is between 50 and 99

APPENDIX

Large organizations are most likely to be using databases (43%). 1 in 5 IT Professionals report their enterprise is using a data warehouse.

Which of the following best describes the type of data stores or solutions currently being used by your organization?

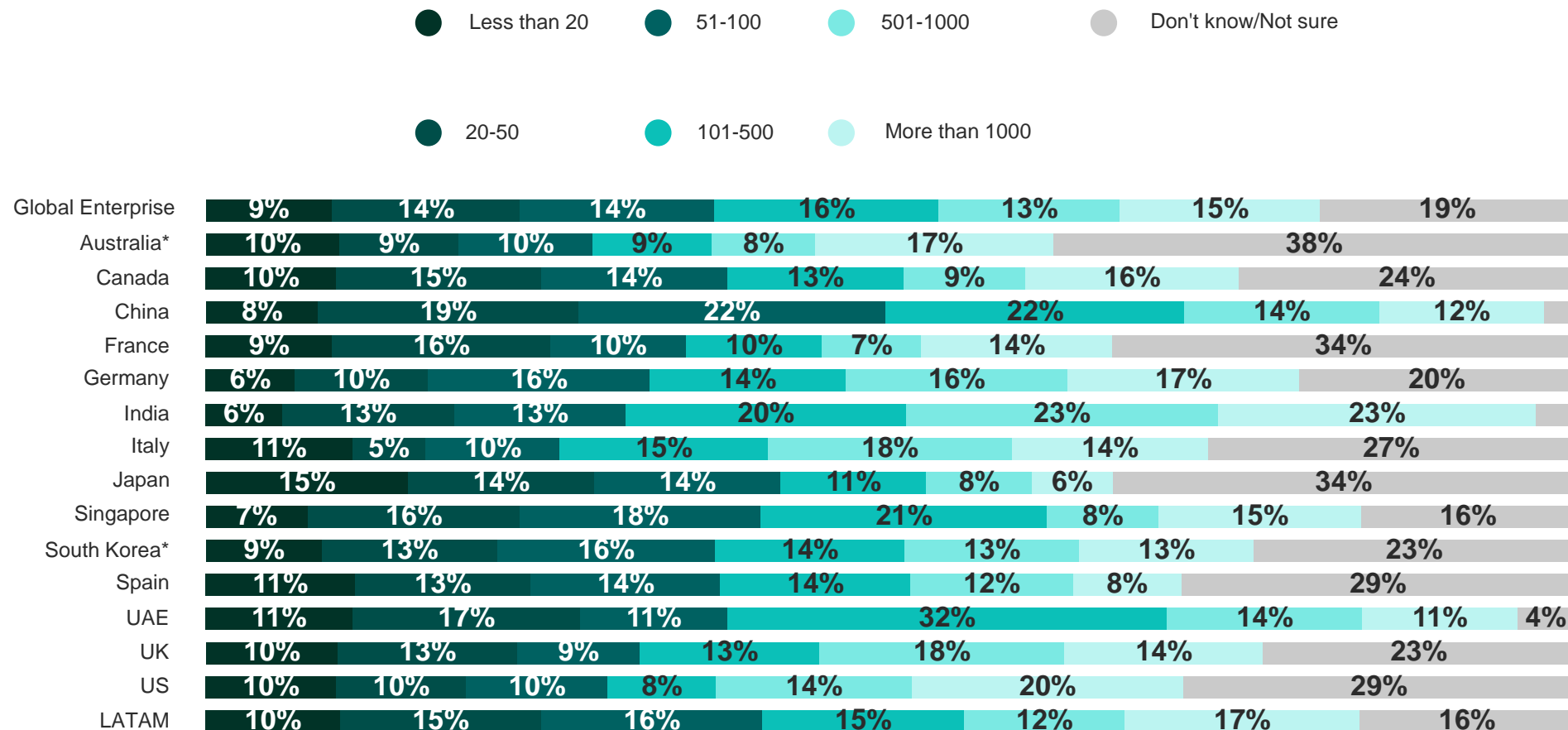


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 \*Sample size is between 50 and 99

APPENDIX

# Most large organizations (72%) are using 20 or more data sources to inform AI, BI, and analytics systems according to IT Professionals.

How many different data sources is your company drawing from to inform your AI, business intelligence (BI), and analytics systems (i.e., databases, data stores, data warehouses, data lakes, IoT, content libraries, external internet, and social media sources, etc.)?

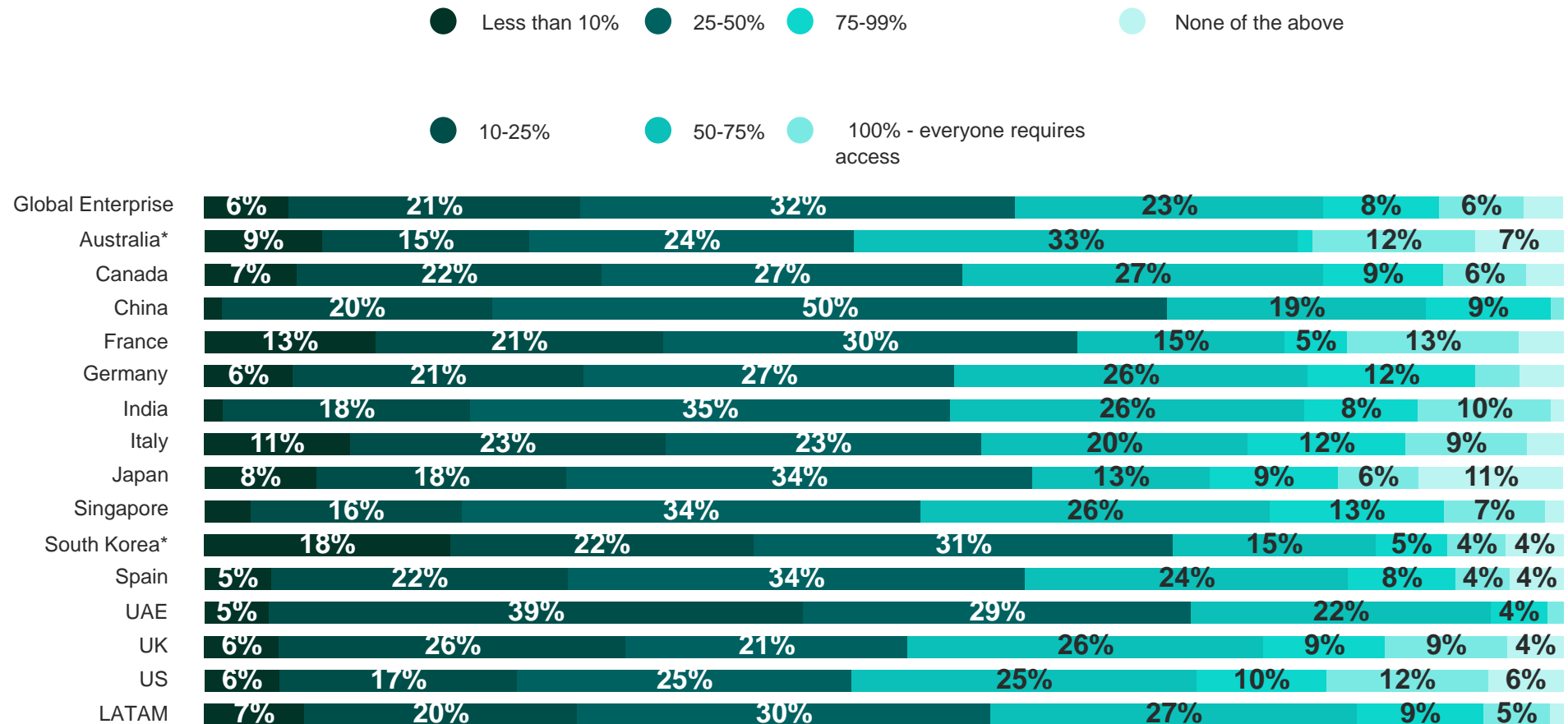


Base IT Professionals at Enterprises (organizations > 1,000 employees): Global Enterprise = 2,342n, Australia = 92n, Canada = 147n, China = 316n, France = 151n, Germany = 154n, India = 215n, Italy = 112n, Japan = 169n, Singapore = 148n, South Korea = 94n, Spain = 101n, UAE = 168n, UK = 145n, US = 126n, LATAM = 204n  
 \*Sample size is between 50 and 99

APPENDIX

Accessible data is critical to large organizations, as 69% of IT Professionals report that 25% or more of their enterprise requires access to company data.

Approximately, what percentage of your workforce requires access to company data (e.g., performance data, user data, asset data, etc.) to make decisions, including non-technical users?



Base IT Professionals at Enterprises (organizations > 1,000 employees): Global Enterprise = 2,342n, Australia = 92n, Canada = 147n, China = 316n, France = 151n, Germany = 154n, India = 215n, Italy = 112n, Japan = 169n, Singapore = 148n, South Korea = 94n, Spain = 101n, UAE = 168n, UK = 145n, US = 126n, LATAM = 204n  
 \*Sample size is between 50 and 99

## APPENDIX

The predominant issue enterprises face with organizational data management is ensuring data security, with 43% of IT Professionals at enterprises saying it is very or somewhat difficult.

How difficult do you think the following parts of your organization's data management strategy are? [Showing Very + Somewhat difficult]

|  | Global Enterprise | Australia* | Canada | China | France | Germany | India | Italy | Japan | Singapore | South Korea* | Spain | UAE | UK  | US  | LATAM |
|--|-------------------|------------|--------|-------|--------|---------|-------|-------|-------|-----------|--------------|-------|-----|-----|-----|-------|
| Ensuring data security                           | 43%               | 45%        | 56%    | 36%   | 46%    | 40%     | 39%   | 36%   | 49%   | 51%       | 50%          | 48%   | 39% | 38% | 46% | 42%   |
| Ensuring data governance, compliance and privacy | 38%               | 42%        | 48%    | 30%   | 42%    | 38%     | 34%   | 37%   | 41%   | 39%       | 38%          | 41%   | 38% | 44% | 43% | 37%   |
| Integrating data across any cloud                | 38%               | 40%        | 46%    | 31%   | 32%    | 40%     | 38%   | 28%   | 37%   | 39%       | 37%          | 44%   | 43% | 43% | 44% | 36%   |
| Managing disparate data sources and formats      | 36%               | 46%        | 47%    | 22%   | 36%    | 38%     | 34%   | 32%   | 43%   | 44%       | 37%          | 48%   | 30% | 40% | 41% | 32%   |
| Data discoverability                             | 33%               | 39%        | 35%    | 24%   | 32%    | 30%     | 35%   | 25%   | 37%   | 41%       | 32%          | 43%   | 36% | 33% | 42% | 30%   |
| Moving data                                      | 32%               | 34%        | 34%    | 33%   | 34%    | 29%     | 31%   | 14%   | 36%   | 38%       | 22%          | 32%   | 33% | 32% | 41% | 31%   |
| Copying data from different sources              | 30%               | 38%        | 31%    | 29%   | 29%    | 26%     | 30%   | 18%   | 38%   | 36%       | 28%          | 30%   | 32% | 30% | 30% | 26%   |
| Granting appropriate data access to users        | 29%               | 30%        | 30%    | 27%   | 28%    | 27%     | 30%   | 27%   | 38%   | 29%       | 27%          | 26%   | 29% | 37% | 38% | 18%   |

Base IT Professionals at Enterprises (organizations > 1,000 employees): Global Enterprise = 2,342n, Australia = 92n, Canada = 147n, China = 316n, France = 151n, Germany = 154n, India = 215n, Italy = 112n, Japan = 169n, Singapore = 148n, South Korea = 94n, Spain = 101n, UAE = 168n, UK = 145n, US = 126n, LATAM = 204n

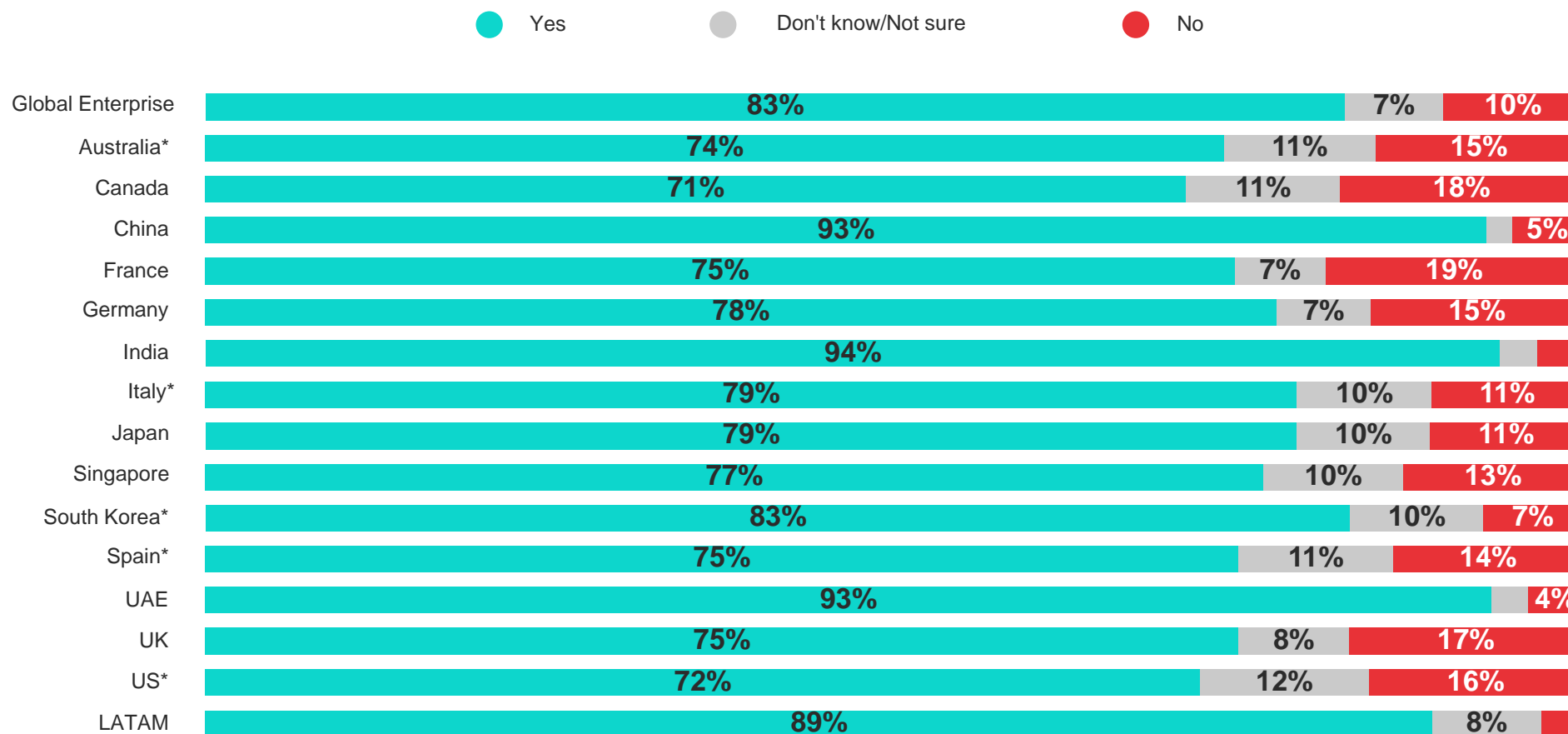
\*Sample size is between 50 and 99

Note: dark green shading indicates the most difficult statements while light green shading indicates the least difficult statements within a specific market

APPENDIX

Explainable AI is a top enterprise concern. 83% of IT Professionals at enterprises currently exploring or deploying AI say it is important to their business.

Is being able to explain how your AI arrived at a decision important to your business? [Among IT Professionals at companies currently exploring or deploying AI]



Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/deploying AI: Global Enterprise = 1,914n, Australia = 73n, Canada = 125n, China = 272n, France = 107n, Germany = 117n, India = 184n, Italy = 82n, Japan = 135n, Singapore = 138n, South Korea = 83n, Spain = 80n, UAE = 151n, UK = 112n, US = 90n, LATAM = 165n  
 \*Sample size is between 50 and 99

## APPENDIX

# Only 7% of IT Professionals report that their enterprise is not using or considering using natural language processing applications.

In which of the following ways, if any, is your company using or considering using natural language processing solutions in any of the following areas? Please select all that apply.

|  | Global Enterprise | Australia* | Canada | China | France | Germany | India | Italy | Japan | Singapore | South Korea* | Spain | UAE | UK  | US  | LATAM |
|--|-------------------|------------|--------|-------|--------|---------|-------|-------|-------|-----------|--------------|-------|-----|-----|-----|-------|
| Security   | 35%               | 27%        | 33%    | 31%   | 36%    | 32%     | 42%   | 35%   | 29%   | 44%       | 32%          | 30%   | 38% | 33% | 25% | 42%   |
| Customer care/customer service   | 35%               | 34%        | 38%    | 36%   | 22%    | 36%     | 48%   | 29%   | 17%   | 41%       | 37%          | 32%   | 36% | 32% | 32% | 40%   |
| Business development   | 30%               | 24%        | 20%    | 36%   | 18%    | 23%     | 47%   | 30%   | 22%   | 36%       | 26%          | 18%   | 43% | 26% | 22% | 32%   |
| Human resources or employee services   | 29%               | 20%        | 30%    | 34%   | 23%    | 23%     | 36%   | 31%   | 26%   | 39%       | 33%          | 22%   | 25% | 31% | 29% | 27%   |
| Market research  | 26%               | 17%        | 21%    | 31%   | 15%    | 21%     | 32%   | 22%   | 20%   | 28%       | 24%          | 20%   | 45% | 26% | 21% | 29%   |
| Marketing  | 26%               | 21%        | 19%    | 25%   | 22%    | 20%     | 31%   | 22%   | 26%   | 30%       | 28%          | 22%   | 39% | 21% | 21% | 30%   |
| Finance  | 24%               | 25%        | 22%    | 27%   | 17%    | 20%     | 36%   | 19%   | 15%   | 26%       | 19%          | 16%   | 20% | 25% | 22% | 31%   |
| Sales  | 24%               | 29%        | 22%    | 28%   | 17%    | 19%     | 32%   | 23%   | 17%   | 27%       | 13%          | 18%   | 23% | 21% | 28% | 34%   |
| Supply chain or procurement  | 24%               | 24%        | 24%    | 34%   | 15%    | 21%     | 31%   | 13%   | 18%   | 33%       | 26%          | 14%   | 27% | 21% | 21% | 24%   |
| Corporate governance or ESG (environmental, social, governance)                                      | 23%               | 18%        | 20%    | 28%   | 13%    | 16%     | 29%   | 20%   | 19%   | 28%       | 19%          | 26%   | 35% | 30% | 14% | 20%   |
| Legal or compliance  | 20%               | 28%        | 18%    | 30%   | 13%    | 16%     | 23%   | 11%   | 18%   | 22%       | 21%          | 21%   | 13% | 19% | 19% | 18%   |
| None of the above  | 3%                | 3%         | 4%     | 3%    | 7%     | 3%      | 1%    | 3%    | 7%    | 1%        | 3%           | 2%    | 1%  | 4%  | 4%  | 2%    |
| Other  | 1%                | 2%         | 0%     | 0%    | 1%     | 1%      | 1%    | 0%    | 2%    | 0%        | 0%           | 1%    | 0%  | 0%  | 2%  | 0%    |
| My company is not currently using or considering the use of natural language processing applications | 7%                | 17%        | 10%    | 3%    | 11%    | 12%     | 3%    | 2%    | 10%   | 5%        | 3%           | 8%    | 2%  | 8%  | 15% | 5%    |

Base IT Professionals at Enterprises (organizations > 1,000 employees): Global Enterprise = 2,342n, Australia = 92n, Canada = 147n, China = 316n, France = 151n, Germany = 154n, India = 215n, Italy = 112n, Japan = 169n, Singapore = 148n, South Korea = 94n, Spain = 101n, UAE = 168n, UK = 145n, US = 126n, LATAM = 204n

\*Sample size is between 50 and 99

Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

## APPENDIX

# Cost is the biggest barrier to natural language processing technology adoption at enterprises globally (48%).

How much of a barrier are the following to your company's adoption of natural language processing technologies? [Among IT Professionals at companies currently using NLP] [Showing Large + Medium barrier]

|   | Global Enterprise | Australia** | Canada* | China | France** | Germany* | India | Italy** | Japan* | Singapore* | South Korea** | Spain** | UAE* | UK* | US** | LATAM* |
|---|-------------------|-------------|---------|-------|----------|----------|-------|---------|--------|------------|---------------|---------|------|-----|------|--------|
| The technology is too expensive   | 48%               |             | 53%     | 35%   |          | 42%      | 46%   |         | 46%    | 47%        |               |         | 54%  | 55% |      | 53%    |
| It is too complex or difficult to use                                     | 46%               |             | 40%     | 38%   |          | 39%      | 50%   |         | 49%    | 47%        |               |         | 46%  | 53% |      | 49%    |
| Requires too much training time to be relevant                            | 46%               |             | 51%     | 43%   |          | 36%      | 47%   |         | 54%    | 39%        |               |         | 46%  | 58% |      | 43%    |
| The AI models aren't explainable  | 46%               |             | 47%     | 36%   |          | 41%      | 54%   |         | 58%    | 49%        |               |         | 48%  | 53% |      | 40%    |
| Difficult to keep the technology up to date                               | 45%               |             | 58%     | 37%   |          | 27%      | 54%   |         | 45%    | 50%        |               |         | 49%  | 55% |      | 43%    |
| Cannot be customized on the specific domain of my business                | 43%               |             | 42%     | 40%   |          | 25%      | 47%   |         | 48%    | 39%        |               |         | 52%  | 55% |      | 44%    |
| Requires too much compute   | 43%               |             | 38%     | 44%   |          | 31%      | 51%   |         | 42%    | 46%        |               |         | 43%  | 56% |      | 35%    |
| Do not know how to incorporate into my business or have a use case for it | 42%               |             | 30%     | 41%   |          | 27%      | 51%   |         | 58%    | 35%        |               |         | 35%  | 53% |      | 39%    |
| My organization does not have the skills required to use or deploy it     | 42%               |             | 51%     | 32%   |          | 34%      | 45%   |         | 54%    | 49%        |               |         | 40%  | 58% |      | 40%    |
| Not enough support for different languages and dialects                   | 41%               |             | 38%     | 46%   |          | 25%      | 48%   |         | 42%    | 28%        |               |         | 45%  | 44% |      | 43%    |
| I can't trust the outcomes of the models                                  | 40%               |             | 38%     | 29%   |          | 36%      | 38%   |         | 45%    | 38%        |               |         | 41%  | 51% |      | 40%    |

Base IT Professionals at Enterprises (organizations > 1,000 employees) using NLP: Global Enterprise = 920n, Canada = 53n, China = 117n, Germany = 59n, India = 112n, Japan = 71n, Singapore = 72n, UAE = 83n, UK = 55n, LATAM = 88n

\*Sample size is between 50 and 99, \*\*Australia, France, Italy, South Korea, Spain, and US sample sizes too low to show

Note: dark green shading indicates the biggest perceived barriers while light green shading indicates the lesser barriers within a specific market



## APPENDIX

Many Enterprise IT Professionals globally state that their companies use AI to enhance customer and employee care, with 35% specifically using AI to boost customer service agent productivity.

Which of the following ways, if any, is your organization using AI to improve customer and employee care? Please select all that apply.

|  | Global Enterprise | Australia* | Canada | China | France | Germany | India | Italy | Japan | Singapore | South Korea* | Spain | UAE | UK  | US  | LATAM |
|--|-------------------|------------|--------|-------|--------|---------|-------|-------|-------|-----------|--------------|-------|-----|-----|-----|-------|
| Improve customer service agent productivity  | 35%               | 26%        | 42%    | 33%   | 30%    | 33%     | 56%   | 28%   | 25%   | 47%       | 28%          | 25%   | 39% | 27% | 29% | 39%   |
| Create a more personalized experience for customers and employees                            | 33%               | 23%        | 27%    | 36%   | 26%    | 32%     | 52%   | 27%   | 22%   | 44%       | 21%          | 27%   | 42% | 23% | 23% | 37%   |
| Survey or feedback analysis  | 33%               | 38%        | 33%    | 30%   | 18%    | 29%     | 48%   | 31%   | 25%   | 45%       | 34%          | 26%   | 43% | 39% | 29% | 29%   |
| Streamline how customers or employees find information or resolve frequently asked questions | 32%               | 28%        | 29%    | 39%   | 20%    | 26%     | 43%   | 25%   | 27%   | 37%       | 39%          | 25%   | 38% | 25% | 30% | 37%   |
| Decrease call wait times   | 28%               | 23%        | 34%    | 28%   | 15%    | 23%     | 37%   | 26%   | 18%   | 30%       | 18%          | 26%   | 28% | 28% | 24% | 42%   |
| Email or text classification   | 27%               | 30%        | 25%    | 25%   | 23%    | 32%     | 40%   | 25%   | 22%   | 28%       | 24%          | 18%   | 33% | 26% | 18% | 25%   |
| Manage increasing call center volume   | 26%               | 17%        | 28%    | 27%   | 16%    | 27%     | 33%   | 29%   | 18%   | 32%       | 18%          | 21%   | 31% | 26% | 22% | 29%   |
| More targeted or personalized advertising  | 26%               | 25%        | 20%    | 30%   | 21%    | 23%     | 43%   | 17%   | 16%   | 30%       | 14%          | 15%   | 32% | 26% | 20% | 32%   |
| Address labor or staffing shortages  | 25%               | 21%        | 22%    | 30%   | 23%    | 21%     | 33%   | 24%   | 28%   | 30%       | 28%          | 21%   | 25% | 25% | 22% | 15%   |
| Identify new revenue streams or cross-sell/up-sell opportunities                             | 25%               | 12%        | 20%    | 35%   | 21%    | 14%     | 40%   | 16%   | 18%   | 31%       | 16%          | 21%   | 30% | 17% | 19% | 32%   |
| Sentiment analysis   | 19%               | 17%        | 12%    | 24%   | 10%    | 12%     | 24%   | 18%   | 12%   | 30%       | 14%          | 24%   | 27% | 23% | 17% | 19%   |
| None of the above  | 3%                | 7%         | 4%     | 2%    | 4%     | 3%      | 1%    | 2%    | 5%    | 1%        | 4%           | 1%    | 0%  | 2%  | 4%  | 2%    |
| Other  | 0%                | 0%         | 0%     | 0%    | 0%     | 0%      | 0%    | 0%    | 1%    | 0%        | 1%           | 1%    | 0%  | 1%  | 0%  | 0%    |
| My company is not using AI to improve customer and employee care                             | 8%                | 14%        | 13%    | 1%    | 15%    | 12%     | 0%    | 6%    | 14%   | 2%        | 7%           | 9%    | 2%  | 11% | 17% | 6%    |

Base IT Professionals at Enterprises (organizations > 1,000 employees): Global Enterprise = 2,342n, Australia = 92n, Canada = 147n, China = 316n, France = 151n, Germany = 154n, India = 215n, Italy = 112n, Japan = 169n, Singapore = 148n, South Korea = 94n, Spain = 101n, UAE = 168n, UK = 145n, US = 126n, LATAM = 204n

\*Sample size is between 50 and 99

Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

## APPENDIX

Only 5% of enterprises globally are not currently using or exploring automation software or tools. Greater efficiencies in business processes (31%) and IT processes (30%) are among the top reasons why large organizations are using or considering automation.

Which of the following reasons best describes why your company is currently using or considering automation software or tools? Please select all that apply.

|   | Global Enterprise | Australia* | Canada | China | France | Germany | India | Italy | Japan | Singapore | South Korea* | Spain | UAE | UK  | US  | LATAM |
|---|-------------------|------------|--------|-------|--------|---------|-------|-------|-------|-----------|--------------|-------|-----|-----|-----|-------|
| Drive greater efficiencies in business processes and tasks                          | 31%               | 45%        | 29%    | 32%   | 27%    | 36%     | 41%   | 22%   | 20%   | 42%       | 27%          | 36%   | 27% | 21% | 25% | 28%   |
| Drive greater efficiencies in IT resources  | 30%               | 26%        | 24%    | 32%   | 19%    | 25%     | 41%   | 29%   | 24%   | 43%       | 23%          | 30%   | 37% | 33% | 21% | 34%   |
| Speed decision making to improve customer experiences                               | 30%               | 27%        | 31%    | 31%   | 17%    | 22%     | 45%   | 29%   | 23%   | 34%       | 27%          | 17%   | 38% | 30% | 29% | 35%   |
| Deliver increased cost savings  | 29%               | 27%        | 34%    | 26%   | 20%    | 22%     | 30%   | 20%   | 40%   | 34%       | 39%          | 21%   | 29% | 34% | 18% | 33%   |
| Give valuable time back to employees so they can focus on higher value work         | 29%               | 25%        | 34%    | 36%   | 29%    | 26%     | 40%   | 25%   | 29%   | 33%       | 24%          | 17%   | 34% | 23% | 24% | 23%   |
| Help identify the right business and IT processes to automate                       | 27%               | 28%        | 27%    | 30%   | 15%    | 23%     | 44%   | 18%   | 20%   | 34%       | 24%          | 18%   | 31% | 26% | 22% | 33%   |
| Enhance network performance   | 25%               | 32%        | 25%    | 21%   | 21%    | 23%     | 35%   | 23%   | 18%   | 27%       | 21%          | 9%    | 30% | 27% | 26% | 36%   |
| Increase observability across the full IT stack                                     | 25%               | 21%        | 21%    | 28%   | 18%    | 22%     | 45%   | 13%   | 16%   | 26%       | 22%          | 15%   | 36% | 19% | 17% | 30%   |
| Ensure optimum application performance  | 24%               | 23%        | 22%    | 25%   | 18%    | 20%     | 28%   | 29%   | 20%   | 30%       | 19%          | 24%   | 27% | 23% | 14% | 32%   |
| Address the labor shortage or skills gap through digital labor                      | 23%               | 16%        | 24%    | 25%   | 16%    | 22%     | 33%   | 15%   | 17%   | 28%       | 29%          | 18%   | 25% | 21% | 22% | 18%   |
| Ensure governance and compliance with document management policies                  | 22%               | 24%        | 27%    | 23%   | 14%    | 20%     | 29%   | 25%   | 15%   | 28%       | 20%          | 16%   | 24% | 21% | 19% | 24%   |
| Get ahead of potential downtime or any technical issues                             | 22%               | 17%        | 19%    | 24%   | 18%    | 20%     | 31%   | 19%   | 17%   | 31%       | 14%          | 12%   | 24% | 18% | 23% | 24%   |
| Reduce carbon footprint of IT resources   | 22%               | 16%        | 18%    | 25%   | 18%    | 17%     | 40%   | 17%   | 15%   | 23%       | 14%          | 21%   | 28% | 23% | 20% | 24%   |
| Maximize your return on cloud investments   | 20%               | 15%        | 16%    | 26%   | 15%    | 16%     | 34%   | 16%   | 16%   | 30%       | 12%          | 24%   | 17% | 19% | 10% | 22%   |
| None of the above   | 2%                | 4%         | 3%     | 2%    | 3%     | 4%      | 0%    | 2%    | 4%    | 1%        | 2%           | 1%    | 1%  | 2%  | 5%  | 1%    |
| Other   | 0%                | 0%         | 0%     | 0%    | 0%     | 0%      | 0%    | 0%    | 1%    | 1%        | 0%           | 1%    | 0%  | 0%  | 0%  | 0%    |
| My company is not currently using or exploring the use automation software or tools | 5%                | 10%        | 6%     | 1%    | 11%    | 4%      | 0%    | 3%    | 9%    | 0%        | 3%           | 7%    | 1%  | 8%  | 13% | 2%    |

Base IT Professionals at Enterprises (organizations > 1,000 employees): Global Enterprise = 2,342n, Australia = 92n, Canada = 147n, China = 316n, France = 151n, Germany = 154n, India = 215n, Italy = 112n, Japan = 169n, Singapore = 148n, South Korea = 94n, Spain = 101n, UAE = 168n, UK = 145n, US = 126n, LATAM = 204n

\*Sample size is between 50 and 99

Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

## APPENDIX

Enterprises are interested in various types of automation software/tools, business process automation (77%) and network performance management (77%) are among the most popular applications.

How interested is your organization in using the following types of automation software or tools? [Showing Very + Somewhat interested]

|   | Global Enterprise | Australia* | Canada | China | France | Germany | India | Italy | Japan | Singapore | South Korea* | Spain | UAE | UK  | US  | LATAM |
|---|-------------------|------------|--------|-------|--------|---------|-------|-------|-------|-----------|--------------|-------|-----|-----|-----|-------|
| Business process automation                     | 77%               | 68%        | 74%    | 87%   | 64%    | 73%     | 87%   | 76%   | 60%   | 83%       | 74%          | 69%   | 92% | 71% | 71% | 79%   |
| Network performance management                  | 77%               | 64%        | 78%    | 84%   | 68%    | 75%     | 88%   | 77%   | 60%   | 81%       | 79%          | 68%   | 88% | 69% | 68% | 84%   |
| Integration                                     | 76%               | 70%        | 77%    | 85%   | 56%    | 73%     | 88%   | 71%   | 57%   | 79%       | 77%          | 72%   | 88% | 74% | 69% | 83%   |
| Digital labor                                   | 75%               | 67%        | 71%    | 84%   | 74%    | 75%     | 85%   | 77%   | 51%   | 73%       | 69%          | 72%   | 87% | 72% | 62% | 84%   |
| Intelligent Document Processing / Understanding | 75%               | 71%        | 70%    | 86%   | 65%    | 77%     | 87%   | 71%   | 53%   | 76%       | 76%          | 58%   | 89% | 68% | 66% | 81%   |
| Hybrid cloud cost optimization tools            | 72%               | 54%        | 76%    | 84%   | 55%    | 62%     | 88%   | 62%   | 52%   | 78%       | 65%          | 66%   | 85% | 68% | 60% | 80%   |
| Multicloud network management                   | 72%               | 54%        | 70%    | 85%   | 54%    | 68%     | 87%   | 59%   | 55%   | 73%       | 69%          | 66%   | 81% | 72% | 64% | 81%   |
| AIOps (AI for IT Operations)                    | 70%               | 57%        | 63%    | 84%   | 54%    | 70%     | 90%   | 66%   | 49%   | 74%       | 64%          | 58%   | 88% | 66% | 56% | 75%   |
| Automated decision management                   | 70%               | 58%        | 65%    | 81%   | 56%    | 67%     | 87%   | 67%   | 55%   | 75%       | 59%          | 70%   | 85% | 65% | 58% | 77%   |
| Enterprise observability                        | 70%               | 58%        | 65%    | 83%   | 57%    | 70%     | 89%   | 63%   | 50%   | 76%       | 64%          | 60%   | 85% | 62% | 60% | 71%   |
| API management                                  | 69%               | 59%        | 59%    | 86%   | 52%    | 66%     | 87%   | 59%   | 56%   | 74%       | 69%          | 62%   | 85% | 57% | 56% | 73%   |
| Robotic process automation                      | 69%               | 54%        | 62%    | 85%   | 59%    | 64%     | 80%   | 70%   | 50%   | 77%       | 69%          | 64%   | 82% | 59% | 56% | 71%   |
| Process mining                                  | 67%               | 51%        | 60%    | 84%   | 62%    | 60%     | 78%   | 54%   | 53%   | 68%       | 64%          | 56%   | 80% | 59% | 62% | 69%   |
| Event streaming                                 | 66%               | 55%        | 54%    | 83%   | 48%    | 62%     | 82%   | 73%   | 49%   | 66%       | 57%          | 54%   | 77% | 57% | 58% | 75%   |

Base IT Professionals at Enterprises (organizations > 1,000 employees): Global Enterprise = 2,342n, Australia = 92n, Canada = 147n, China = 316n, France = 151n, Germany = 154n, India = 215n, Italy = 112n, Japan = 169n, Singapore = 148n, South Korea = 94n, Spain = 101n, UAE = 168n, UK = 145n, US = 126n, LATAM = 204n

\*Sample size is between 50 and 99

Note: dark green shading indicates the statements with the highest interest while light green shading indicates the statements with the lowest interest within a specific market

## APPENDIX

# Enterprises are most likely to be using or considering using automation for IT process automation (33%).

Which of the following use cases is your company using or considering using automation capabilities for?

|   | Global Enterprise | Australia* | Canada | China | France | Germany | India | Italy | Japan | Singapore | South Korea* | Spain | UAE | UK  | US  | LATAM |
|---|-------------------|------------|--------|-------|--------|---------|-------|-------|-------|-----------|--------------|-------|-----|-----|-----|-------|
| Automating IT processes   | 33%               | 27%        | 39%    | 27%   | 15%    | 36%     | 48%   | 32%   | 26%   | 42%       | 28%          | 27%   | 42% | 34% | 28% | 39%   |
| Automating IT or software asset management                                  | 27%               | 14%        | 27%    | 25%   | 13%    | 24%     | 42%   | 32%   | 20%   | 32%       | 28%          | 24%   | 39% | 28% | 24% | 26%   |
| Automating customer care experiences  | 25%               | 29%        | 22%    | 21%   | 15%    | 30%     | 36%   | 22%   | 14%   | 34%       | 23%          | 24%   | 29% | 21% | 20% | 32%   |
| Cloud cost optimization   | 24%               | 25%        | 26%    | 17%   | 20%    | 28%     | 33%   | 20%   | 27%   | 30%       | 22%          | 18%   | 22% | 23% | 15% | 26%   |
| Monitoring network performance  | 24%               | 28%        | 29%    | 20%   | 20%    | 19%     | 35%   | 15%   | 20%   | 29%       | 17%          | 13%   | 27% | 21% | 21% | 31%   |
| Automating AI and data governance processes                                 | 23%               | 15%        | 22%    | 24%   | 18%    | 23%     | 32%   | 20%   | 21%   | 29%       | 13%          | 19%   | 27% | 23% | 14% | 30%   |
| Automating business processes and workflows                                 | 22%               | 20%        | 14%    | 25%   | 16%    | 18%     | 33%   | 17%   | 19%   | 30%       | 15%          | 15%   | 24% | 22% | 17% | 26%   |
| Monitoring application performance  | 22%               | 24%        | 18%    | 21%   | 17%    | 19%     | 26%   | 20%   | 16%   | 32%       | 16%          | 22%   | 21% | 23% | 23% | 25%   |
| Proactive IT incident management  | 22%               | 26%        | 22%    | 20%   | 11%    | 19%     | 33%   | 21%   | 9%    | 34%       | 17%          | 20%   | 23% | 19% | 17% | 30%   |
| Reducing energy consumption of IT systems                                   | 22%               | 14%        | 16%    | 22%   | 15%    | 24%     | 37%   | 26%   | 12%   | 27%       | 18%          | 21%   | 18% | 18% | 13% | 30%   |
| Automating HR processes   | 21%               | 24%        | 28%    | 20%   | 17%    | 16%     | 27%   | 13%   | 19%   | 19%       | 18%          | 18%   | 30% | 22% | 21% | 22%   |
| Automating network processes  | 21%               | 18%        | 20%    | 20%   | 15%    | 19%     | 26%   | 22%   | 18%   | 25%       | 24%          | 23%   | 17% | 19% | 19% | 27%   |
| Real-time inventory management  | 21%               | 27%        | 20%    | 21%   | 19%    | 21%     | 31%   | 12%   | 22%   | 23%       | 21%          | 15%   | 17% | 23% | 19% | 18%   |
| 5G networking and/or network slicing  | 20%               | 18%        | 17%    | 20%   | 11%    | 14%     | 39%   | 17%   | 11%   | 20%       | 12%          | 24%   | 20% | 21% | 14% | 23%   |
| Automating risk and compliance management processes                         | 20%               | 16%        | 19%    | 24%   | 15%    | 20%     | 32%   | 17%   | 16%   | 23%       | 12%          | 13%   | 22% | 20% | 12% | 21%   |
| Automating sales processes  | 20%               | 18%        | 14%    | 20%   | 16%    | 22%     | 28%   | 8%    | 17%   | 20%       | 17%          | 16%   | 27% | 19% | 13% | 29%   |
| Managing application performance across hybrid and multiclouds              | 20%               | 18%        | 16%    | 20%   | 17%    | 17%     | 30%   | 6%    | 22%   | 30%       | 14%          | 18%   | 18% | 20% | 17% | 22%   |
| Augmenting employees with digital labor                                     | 19%               | 22%        | 24%    | 18%   | 14%    | 21%     | 26%   | 21%   | 14%   | 19%       | 20%          | 11%   | 18% | 14% | 18% | 25%   |
| Managing network performance for applications across hybrid and multiclouds | 19%               | 21%        | 16%    | 19%   | 15%    | 16%     | 28%   | 13%   | 9%    | 31%       | 18%          | 13%   | 20% | 21% | 13% | 25%   |
| Automating ESG reporting  | 16%               | 12%        | 13%    | 17%   | 14%    | 12%     | 23%   | 15%   | 9%    | 19%       | 19%          | 11%   | 20% | 19% | 13% | 18%   |
| Managing edge applications  | 15%               | 13%        | 12%    | 20%   | 8%     | 19%     | 25%   | 6%    | 10%   | 22%       | 14%          | 11%   | 14% | 14% | 15% | 14%   |
| None of the above   | 6%                | 11%        | 7%     | 2%    | 10%    | 6%      | 1%    | 4%    | 15%   | 1%        | 6%           | 9%    | 2%  | 8%  | 15% | 3%    |
| Other   | 0%                | 0%         | 0%     | 0%    | 0%     | 0%      | 0%    | 0%    | 0%    | 0%        | 0%           | 1%    | 0%  | 0%  | 1%  | 0%    |

Base IT Professionals at Enterprises (organizations > 1,000 employees): Global Enterprise = 2,342n, Australia = 92n, Canada = 147n, China = 316n, France = 151n, Germany = 154n, India = 215n, Italy = 112n, Japan = 169n, Singapore = 148n, South Korea = 94n, Spain = 101n, UAE = 168n, UK = 145n, US = 126n, LATAM = 204n

\*Sample size is between 50 and 99

Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

## APPENDIX

# Improvements in IT or network performance is the top benefit of using AI and automation for IT, business and/or network processes according to Enterprise IT Professionals (49%).

Which of the following are benefits your organization is gaining from using AI and automation for IT, business and/or network processes? Please select all that apply. **[Among IT Professionals at companies that use AI for business analytics/intelligence or to automate IT processes, business processes, and/or network processes]**

|  | Global Enterprise | Australia** | Canada* | China | France* | Germany* | India | Italy* | Japan* | Singapore* | South Korea** | Spain** | UAE | UK* | US** | LATAM |
|--|-------------------|-------------|---------|-------|---------|----------|-------|--------|--------|------------|---------------|---------|-----|-----|------|-------|
| Improvements in IT or network performance                  | 49%               |             | 55%     | 43%   | 35%     | 57%      | 60%   | 42%    | 31%    | 57%        |               |         | 56% | 39% |      | 57%   |
| Employees are freed to focus on higher value tasks         | 45%               |             | 44%     | 47%   | 37%     | 38%      | 52%   | 33%    | 39%    | 61%        |               |         | 42% | 49% |      | 46%   |
| Faster mean time to resolution                             | 43%               |             | 48%     | 40%   | 33%     | 39%      | 44%   | 37%    | 48%    | 51%        |               |         | 36% | 41% |      | 54%   |
| Mitigating labor and skills shortages in our IT department | 39%               |             | 32%     | 35%   | 25%     | 34%      | 53%   | 28%    | 39%    | 49%        |               |         | 50% | 37% |      | 32%   |
| Acceleration of business processes/results                 | 36%               |             | 37%     | 31%   | 25%     | 34%      | 42%   | 35%    | 34%    | 38%        |               |         | 28% | 37% |      | 43%   |
| Real-time visibility of your applications                  | 36%               |             | 29%     | 39%   | 44%     | 33%      | 48%   | 28%    | 27%    | 33%        |               |         | 39% | 39% |      | 34%   |
| Reduction in infrastructure spend                          | 35%               |             | 27%     | 41%   | 17%     | 32%      | 39%   | 26%    | 48%    | 37%        |               |         | 30% | 35% |      | 39%   |
| Delivering and scaling new services more quickly           | 34%               |             | 34%     | 31%   | 27%     | 39%      | 43%   | 28%    | 31%    | 35%        |               |         | 32% | 35% |      | 39%   |
| Better experiences for our customers                       | 33%               |             | 29%     | 47%   | 27%     | 24%      | 49%   | 18%    | 14%    | 41%        |               |         | 33% | 24% |      | 35%   |
| Reduction of outages                                       | 29%               |             | 31%     | 27%   | 31%     | 36%      | 23%   | 42%    | 25%    | 35%        |               |         | 25% | 27% |      | 33%   |
| Accelerated delivery of new applications and services      | 26%               |             | 18%     | 28%   | 13%     | 22%      | 37%   | 16%    | 14%    | 37%        |               |         | 23% | 24% |      | 32%   |
| Accelerated recruiting and hiring                          | 24%               |             | 27%     | 27%   | 23%     | 24%      | 36%   | 23%    | 16%    | 20%        |               |         | 10% | 37% |      | 30%   |
| Reduction in data center emissions or carbon footprint     | 22%               |             | 19%     | 22%   | 12%     | 20%      | 34%   | 16%    | 17%    | 22%        |               |         | 15% | 35% |      | 23%   |
| None of the above  | 0%                |             | 0%      | 0%    | 0%      | 0%       | 0%    | 2%     | 0%     | 0%         |               |         | 0%  | 0%  |      | 0%    |
| Other  | 0%                |             | 0%      | 0%    | 0%      | 0%       | 0%    | 0%     | 0%     | 0%         |               |         | 0%  | 0%  |      | 0%    |
| We are not using AI for this purpose                       | 0%                |             | 0%      | 0%    | 0%      | 0%       | 0%    | 0%     | 0%     | 0%         |               |         | 0%  | 2%  |      | 0%    |

Base IT Professionals at Enterprises (organizations > 1,000 employees) using AI for BI or to automate IT, business, or network processes: Global Enterprise = 1,148n, Canada = 62n, China = 181n, France = 52n, Germany = 76n, India = 132n, Italy = 57n, Japan = 64n, Singapore = 82n, UAE = 107n, UK = 51n, LATAM = 112n

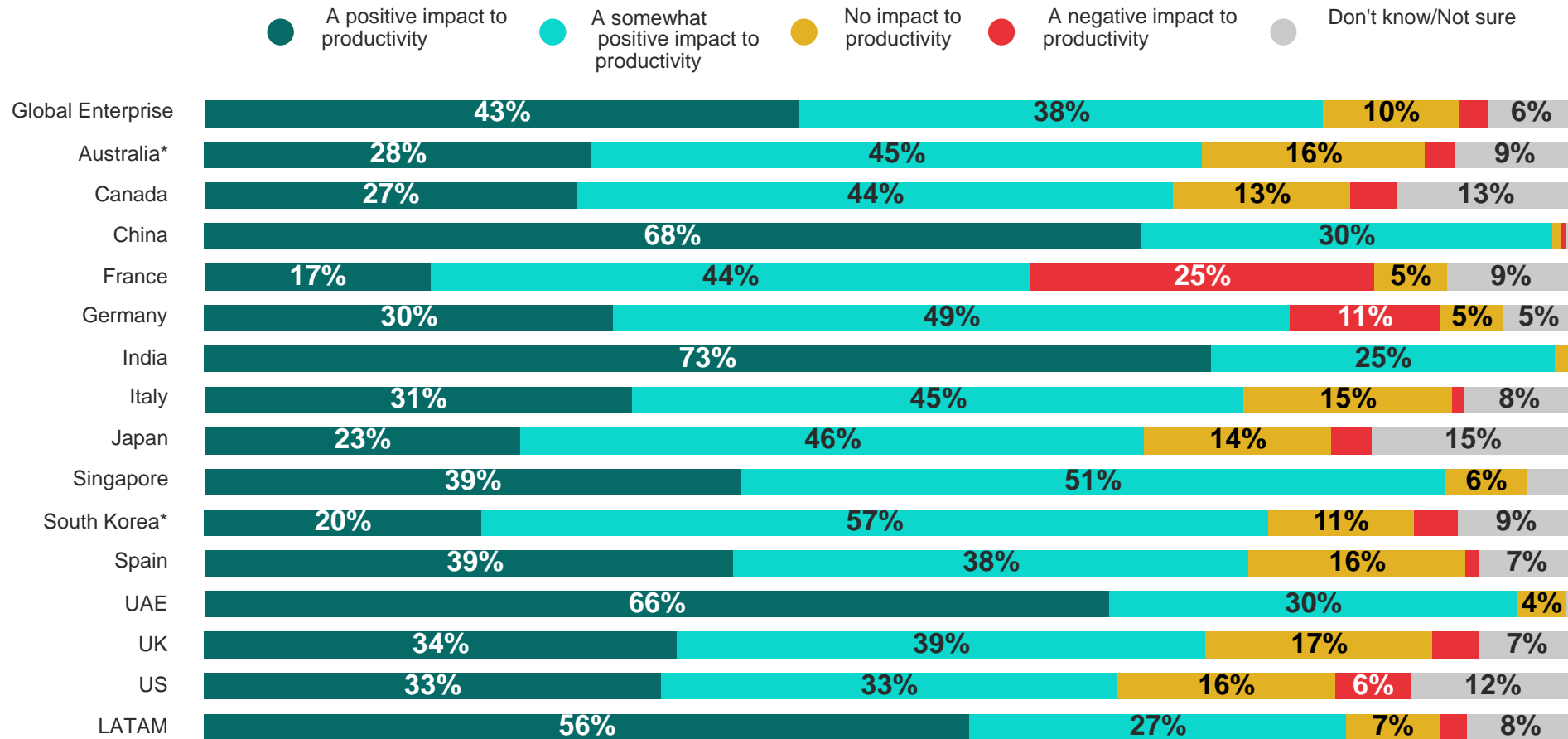
\*Sample size is between 50 and 99; \*\*Australia, South Korea, Spain, and US sample sizes too low to show

Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

APPENDIX

# AI and automation investments have perceived positive impacts among a majority of IT Professionals at enterprises (81%).

How has investing in AI and automation impacted your employees' overall productivity? It has had...



Base IT Professionals at Enterprises (organizations > 1,000 employees): Global Enterprise = 2,342n, Australia = 92n, Canada = 147n, China = 316n, France = 151n, Germany = 154n, India = 215n, Italy = 112n, Japan = 169n, Singapore = 148n, South Korea = 94n, Spain = 101n, UAE = 168n, UK = 145n, US = 126n, LATAM = 204n  
 \*Sample size is between 50 and 99



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