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IBM

IBM GLOBAL AI ADOPTION INDEX – GLOBAL REPORT

NOVEMBER 8 – 23, 2023

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REPRESENTATIVE SAMPLE OF IT PROFESSIONALS IN MARKET

- 8,584 IT professionals
  - Approx. 500 in each country (Australia, Canada, China, France, Germany, India, Italy, Japan, Singapore, South Korea, Spain, UAE, UK, US)
  - Approx. 1000 in LATAM (Brazil, Mexico, Peru, Argentina, Chile, Colombia)
- To qualify for the survey, participants must be employed full-time, work at companies with more than 1 employee, 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.

RESPONDENTS REPRESENTED A MIX OF SMALL AND LARGE FIRMS

- 28% of respondents came from firms with more than 1,000 employees
- 27% of respondents came from firms with 251 to 1,000 employees
- 20% of respondents came from firms with 51 to 250 employees
- 26% of respondents came from firms with 50 or less employees
- Sole proprietorships were not sampled

RESPONDENTS REPRESENTED A MIX OF SENIORITY

- All respondents were required to have significant insight or input into their firm's IT decision-making
- 25% 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 organizations globally one year after the release of GPT-3.** Many of those companies already exploring or deploying AI have accelerated their roll-out of AI in the past two years, with 'Research and Development' and 'Workforce Upskilling' emerging as top investment priorities. In the dynamic landscape of generative AI, companies are increasingly utilizing open source technology, with an even split in use between in-house and open-source technologies.

2. **As companies 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, IT Professionals highlight AI-tailored solutions, accessible tools, and a demand for AI skills as key industry changes. However, challenges like limited knowledge, a lack of AI development tools, and high costs hinder adoption. In the context of generative AI, additional obstacles emerge, including data privacy concerns and a persistent shortage of implementation skills.

3. **AI is contributing to multiple facets of organizational operations, with IT process automation and marketing being the most popular applications.** IT Professionals are at the forefront of AI usage at their companies 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 company has the right tools to find data across the business.

4. **Trustworthy and responsible AI practices are of utmost importance to both consumers and companies at various stages of AI implementation.** In fact, most companies 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 the biggest barriers companies face as they strive to develop trustworthy AI.

5. **AI has a predominantly positive influence on the workforce.** Numerous companies 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 companies with the tools to streamline tasks and automate self-service interactions.

AI ADOPTION & INVESTMENTS

DRIVERS & BARRIERS OF AI

CURRENT USES OF AI

AI ETHICS AND RESPONSIBILITY

AI'S IMPACT ON EMPLOYEES
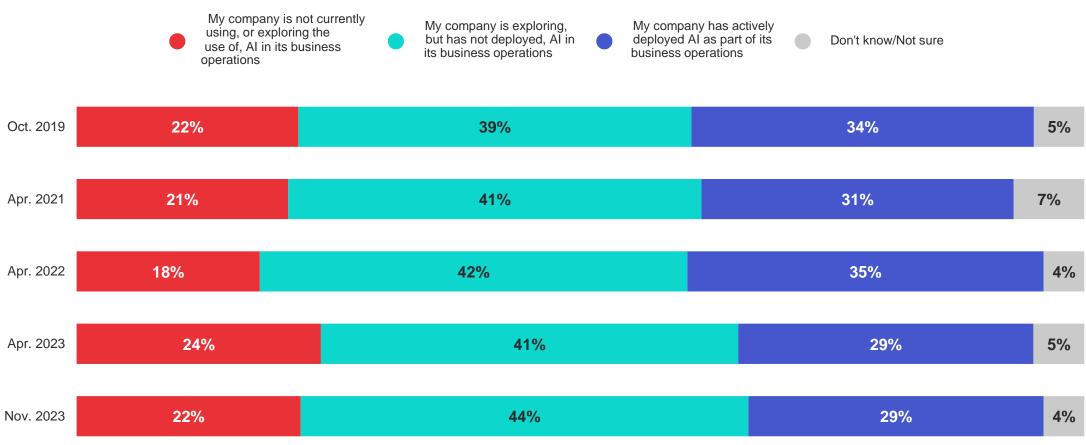
AI ADOPTION & INVESTMENTS
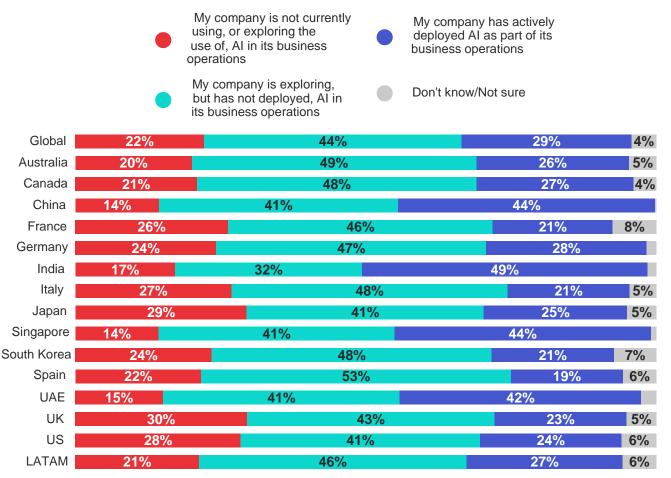
In line with April 2023 findings, 29% of IT Professionals report their company's current deployment of AI, with an additional 44% actively exploring AI.

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

● My company is not currently using, or exploring the use of, AI in its business operations

● My company is exploring, but has not deployed, AI in its business operations

● My company has actively deployed AI as part of its business operations

● Don't know/Not sure

	Not currently using/exploring	Exploring, not deployed	Actively deployed	Don't know/Not sure
Oct. 2019	22%	39%	34%	5%
Apr. 2021	21%	41%	31%	7%
Apr. 2022	18%	42%	35%	4%
Apr. 2023	24%	41%	29%	5%
Nov. 2023	22%	44%	29%	4%

AI ADOPTION & INVESTMENTS

Companies within the financial services and telecommunications industries are most likely to be using AI, with around a third of IT professionals within those industries reporting their company has actively deployed AI.

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

● My company is not currently using, or exploring the use of, AI in its business operations

● My company is exploring, but has not deployed, AI in its business operations

● My company has actively deployed AI as part of its business operations

● Don't know/Not sure

Industry	Not using	Exploring	Deployed	Don't know
Global	22%	44%	29%	4%
Financial Services Industry	20%	42%	34%	4%
Telecommunications Industry	17%	48%	32%	4%
Media & Entertainment Industry	22%	49%	26%	3%
Government Industry	24%	54%	16%	7%
Energy, Environment, Utility Industry	24%	54%	18%	4%
Automotive Industry	23%	50%	22%	5%
Chemicals/Oil/Gas Industry	23%	46%	26%	5%
Industrial Industry	24%	47%	26%	
Healthcare Industry	26%	48%	20%	6%
Retail Industry	26%	45%	24%	6%
Aerospace/Defense Industry*	29%	44%	22%	5%
Travel & Transportation Industry	23%	54%	18%	5%

*Sample size between 50 and 99

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AI ADOPTION & INVESTMENTS

Similarly, 29% are currently implementing generative AI (+3% increase from April), and 43% are in the exploration phase (+2% increase from April).

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

● We are actively implementing generative AI   ● We are currently exploring generative AI   ● We are not exploring nor actively implementing generative AI   ● Don't know/Not sure

Apr. 2023	26%	41%	22%	11%
Nov. 2023	29%	43%	19%	9%
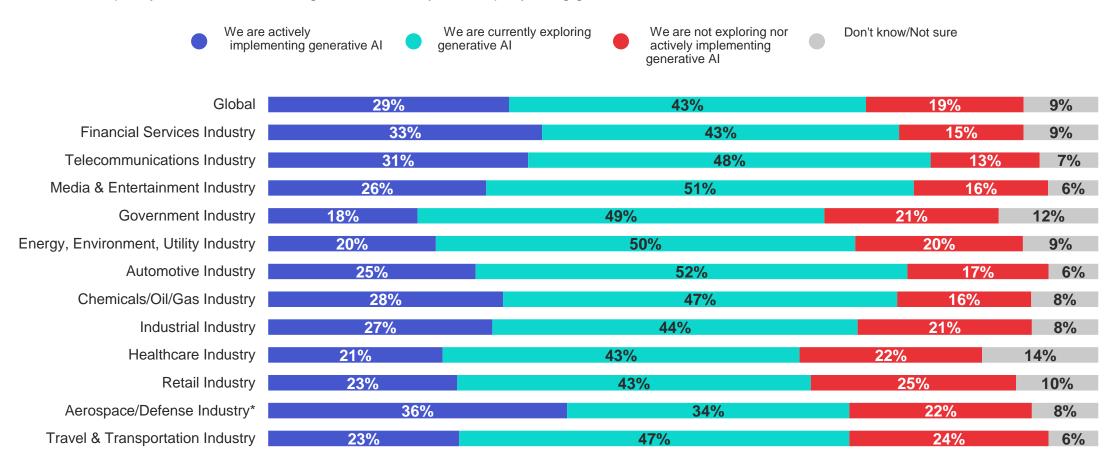
Since April '23, reported implementation of AI has gone up in Australia (+9%), Germany (+10%), Singapore (+10%), South Korea (+5%), the UK (+16%), and LATAM (+6%).

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

● We are actively implementing generative AI   ● We are currently exploring generative AI   ● We are not exploring nor actively implementing generative AI   ● Don't know/Not sure

Country	Actively implementing	Currently exploring	Not exploring nor implementing	Don't know/Not sure
Global	29%	43%	19%	9%
Australia	24%	47%	19%	11%
Canada	16%	49%	26%	10%
China	54%	41%		
France	19%	42%	23%	16%
Germany	30%	45%	17%	8%
India	52%	39%	7%	
Italy	19%	41%	29%	11%
Japan	19%	39%	32%	9%
Singapore	39%	45%	11%	5%
South Korea	13%	43%	30%	14%
Spain	21%	46%	21%	12%
UAE	42%	45%	8%	5%
UK	28%	43%	20%	9%
US	26%	40%	20%	14%
LATAM	28%	43%	21%	8%

Generative AI adoption is driven by companies who are already deploying AI in their business. 57% of IT Professionals at companies currently deploying AI also report that their company is implementing generative AI, compared to only 16% of those at companies only exploring AI.

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

- ● We are actively implementing generative AI
- ● We are currently exploring generative AI
- ● We are not exploring nor actively implementing generative AI
- ● Don't know/Not sure

Currently Deploying AI

| 57% | 35% | 5% | 3% |

Exploring AI

| 16% | 60% | 16% | 8% |

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AI ADOPTION & INVESTMENTS
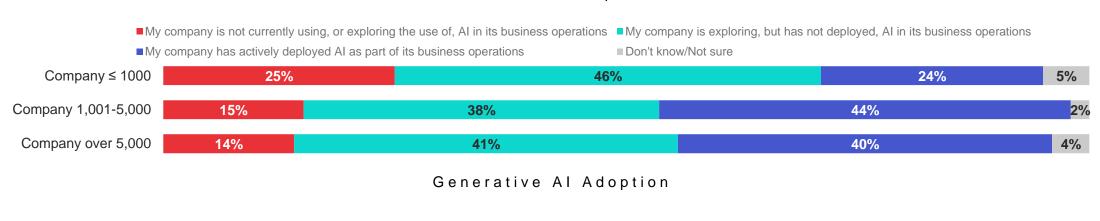
3-in-10 or more of IT professionals within the financial services, telecommunications, and aerospace/defense industries indicate that their company is implementing generative AI.

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

- ● We are actively implementing generative AI
- ● We are currently exploring generative AI
- ● We are not exploring nor actively implementing generative AI
- ● Don't know/Not sure

Industry	Actively implementing	Currently exploring	Not exploring	Don't know
Global	29%	43%	19%	9%
Financial Services Industry	33%	43%	15%	9%
Telecommunications Industry	31%	48%	13%	7%
Media & Entertainment Industry	26%	51%	16%	6%
Government Industry	18%	49%	21%	12%
Energy, Environment, Utility Industry	20%	50%	20%	9%
Automotive Industry	25%	52%	17%	6%
Chemicals/Oil/Gas Industry	28%	47%	16%	8%
Industrial Industry	27%	44%	21%	8%
Healthcare Industry	21%	43%	22%	14%
Retail Industry	23%	43%	25%	10%
Aerospace/Defense Industry*	36%	34%	22%	8%
Travel & Transportation Industry	23%	47%	24%	6%

*Sample size between 50 and 99

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Companies with 1,000 or fewer employees are less likely than larger companies 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?
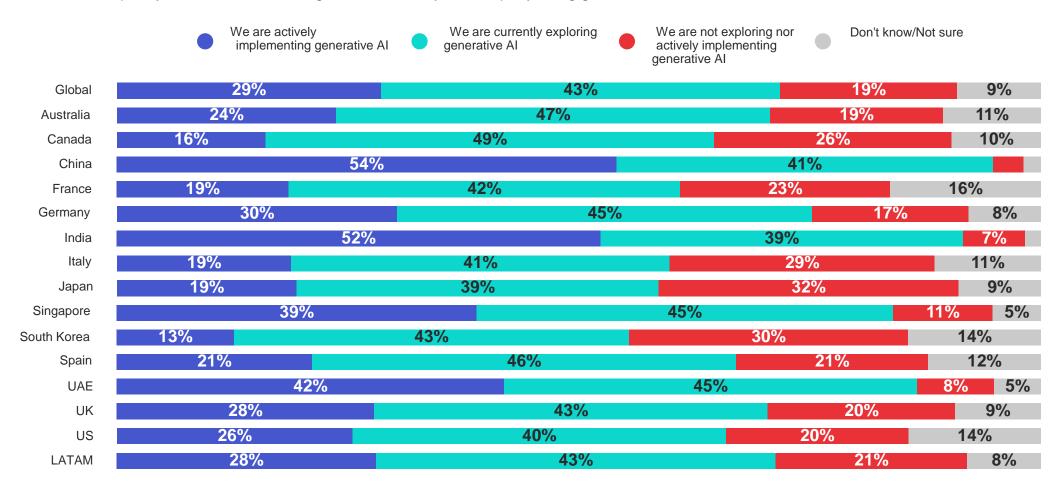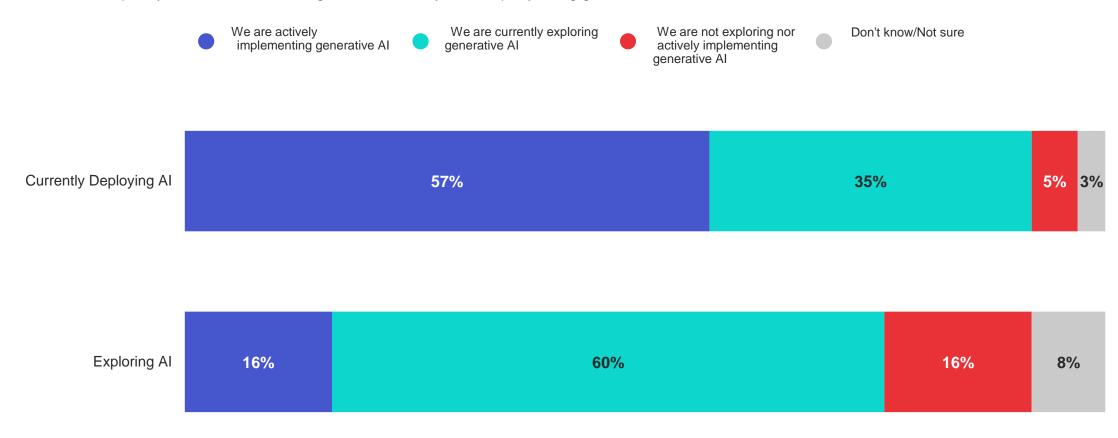ChatGPT has quickly raised awareness of generative AI. Is your company using generative AI?

General AI Adoption

■ My company is not currently using, or exploring the use of, AI in its business operations   ■ My company is exploring, but has not deployed, AI in its business operations
■ My company has actively deployed AI as part of its business operations   ■ Don't know/Not sure

Company ≤ 1000	25%	46%	24%	5%
Company 1,001-5,000	15%	38%	44%	2%
Company over 5,000	14%	41%	40%	4%

Generative AI Adoption

■ We are not exploring nor actively implementing generative AI   ■ We are currently exploring generative AI   ■ We are actively implementing generative AI   ■ Don't know/Not sure

Company ≤ 1000	22%	44%	25%	9%
Company 1,001-5,000	11%	42%	40%	7%
Company over 5,000	12%	42%	36%	9%

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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

	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	None of the above
Apr. 2022	53%	14%	7%	24%	
Apr. 2023	51%	17%	8%	21%	3%
Nov. 2023	50%	17%	8%	23%	3%
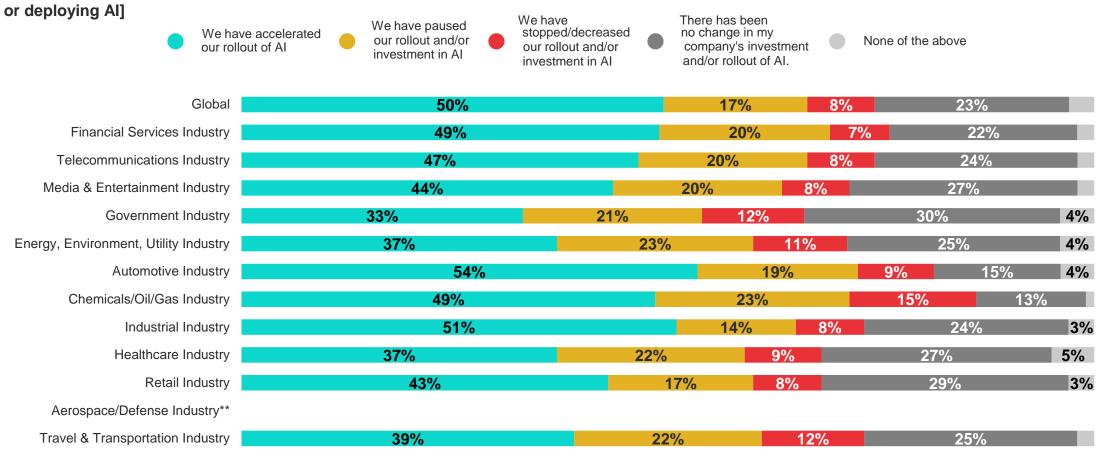
50% of IT Professionals at companies deploying or exploring AI indicate that their company has accelerated the AI rollout in the past 24 months, and only about a quarter (23%) say that their investment has remained unchanged.

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]**

● 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

	Accelerated	Paused	Stopped/decreased	No change	None
Global	50%	17%	8%	23%	
Australia	42%	16%	6%	30%	6%
Canada	31%	20%	9%	34%	6%
China	84%	4%		8%	
France	42%	12%	14%	29%	
Germany	45%	16%	7%	29%	
India	67%	14%	4%	14%	
Italy	40%	19%	14%	25%	
Japan	38%	8%	8%	39%	7%
Singapore	61%	12%	5%	21%	
South Korea	37%	19%	10%	31%	
Spain	41%	32%	9%	15%	
UAE	65%	15%	5%	13%	
UK	30%	29%	10%	29%	
US	38%	22%	6%	29%	6%
LATAM	58%	18%	9%	14%	

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IT Professionals in the automotive, financial services, chemicals/oil/gas, and industrial industries are most likely to report their company 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]**

● 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

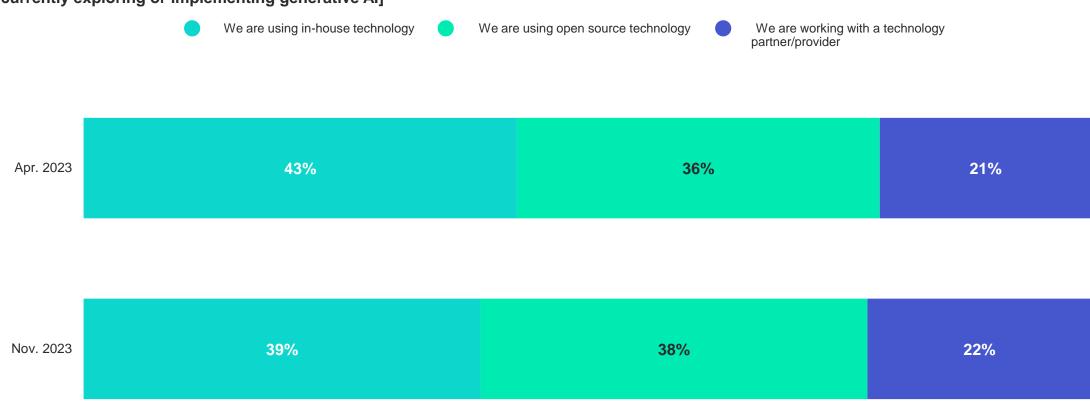| Industry	Accelerated	Paused	Stopped/Decreased	No change	None
Global	50%	17%	8%	23%	
Financial Services Industry	49%	20%	7%	22%	
Telecommunications Industry	47%	20%	8%	24%	
Media & Entertainment Industry	44%	20%	8%	27%	
Government Industry	33%	21%	12%	30%	4%
Energy, Environment, Utility Industry	37%	23%	11%	25%	4%
Automotive Industry	54%	19%	9%	15%	4%
Chemicals/Oil/Gas Industry	49%	23%	15%	13%	
Industrial Industry	51%	14%	8%	24%	3%
Healthcare Industry	37%	22%	9%	27%	5%
Retail Industry	43%	17%	8%	29%	3%
Aerospace/Defense Industry**					
Travel & Transportation Industry	39%	22%	12%	25%	

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Research and development (39%) and reskilling/workforce development (36%) are the top AI investments at 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]**
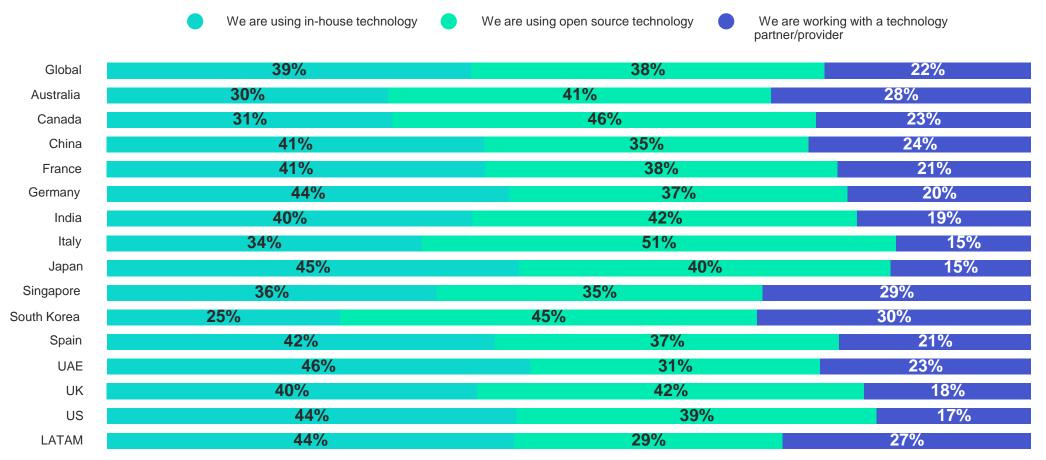
	Global	Australia	Canada	China	France	Germany	India	Italy	Japan	Singapore	South Korea	Spain	UAE	UK	US	LATAM
Research & Development	39%	37%	40%	40%	31%	27%	59%	34%	22%	44%	30%	38%	46%	41%	45%	42%
Reskilling and workforce development	36%	33%	34%	37%	38%	34%	51%	26%	32%	45%	37%	30%	45%	34%	31%	35%
Build proprietary AI solutions	32%	24%	20%	48%	25%	36%	47%	26%	32%	38%	20%	26%	46%	26%	27%	27%
Augmenting human tasks with digital labor	31%	26%	25%	39%	24%	39%	41%	26%	21%	35%	31%	26%	39%	30%	30%	29%
Off-the-shelf AI applications	30%	23%	21%	42%	31%	35%	23%	18%	34%	30%	26%	34%	40%	19%	23%	42%
Embed AI into current applications and processes	25%	21%	19%	25%	22%	26%	36%	16%	23%	29%	21%	23%	26%	17%	19%	36%
Off-the-shelf tools to build our own applications and models	25%	17%	19%	38%	22%	25%	28%	18%	28%	30%	24%	23%	28%	19%	23%	29%
Don't know/Not sure	4%	9%	8%	0%	4%	2%	1%	4%	7%	4%	7%	4%	0%	6%	8%	1%
Other	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

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
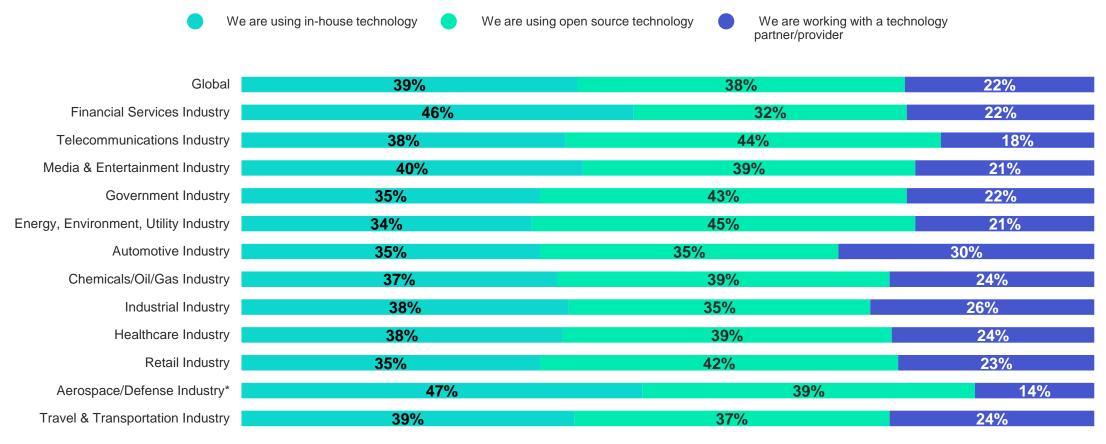
Among organizations implementing or exploring generative AI, most are using either in-house technology (39%) or open source technology (38%), with reported use of in-house slightly down since April 2023 (43% vs. 39%).

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

Apr. 2023	43%	36%	21%
Nov. 2023	39%	38%	22%

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IT professionals at companies exploring or deploying generative AI in Canada, Italy, and South Korea 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]**
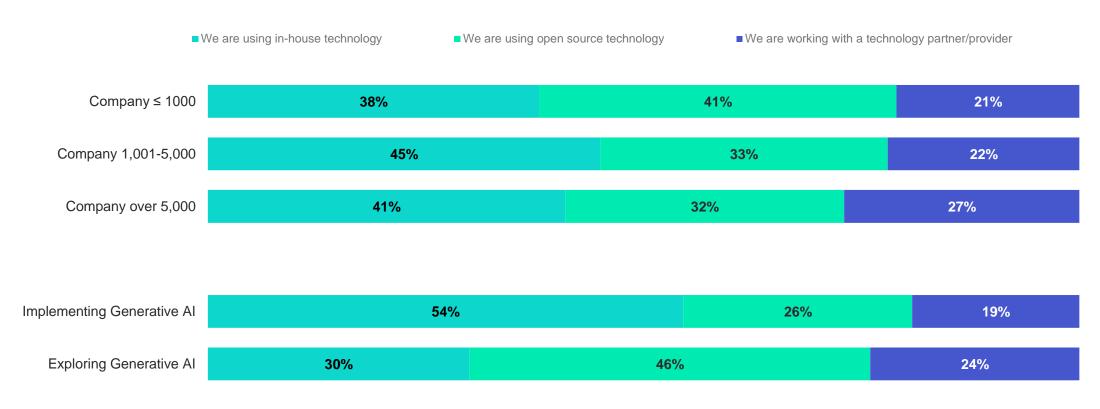
● We are using in-house technology   ● We are using open source technology   ● We are working with a technology partner/provider

Country	In-house technology	Open source technology	Technology partner/provider
Global	39%	38%	22%
Australia	30%	41%	28%
Canada	31%	46%	23%
China	41%	35%	24%
France	41%	38%	21%
Germany	44%	37%	20%
India	40%	42%	19%
Italy	34%	51%	15%
Japan	45%	40%	15%
Singapore	36%	35%	29%
South Korea	25%	45%	30%
Spain	42%	37%	21%
UAE	46%	31%	23%
UK	40%	42%	18%
US	44%	39%	17%
LATAM	44%	29%	27%

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In-house technology is most likely to be utilized in the financial services and aerospace/defense 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]**

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

Industry	In-house	Open source	Partner/provider
Global	39%	38%	22%
Financial Services Industry	46%	32%	22%
Telecommunications Industry	38%	44%	18%
Media & Entertainment Industry	40%	39%	21%
Government Industry	35%	43%	22%
Energy, Environment, Utility Industry	34%	45%	21%
Automotive Industry	35%	35%	30%
Chemicals/Oil/Gas Industry	37%	39%	24%
Industrial Industry	38%	35%	26%
Healthcare Industry	38%	39%	24%
Retail Industry	35%	42%	23%
Aerospace/Defense Industry*	47%	39%	14%
Travel & Transportation Industry	39%	37%	24%

*Sample size between 50 and 99

Companies 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]**

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

	In-house	Open source	Partner/provider
Company ≤ 1000	38%	41%	21%
Company 1,001-5,000	45%	33%	22%
Company over 5,000	41%	32%	27%
Implementing Generative AI	54%	26%	19%
Exploring Generative AI	30%	46%	24%

AI ADOPTION & INVESTMENTS

DRIVERS & BARRIERS OF AI

CURRENT USES OF AI

AI ETHICS AND RESPONSIBILITY
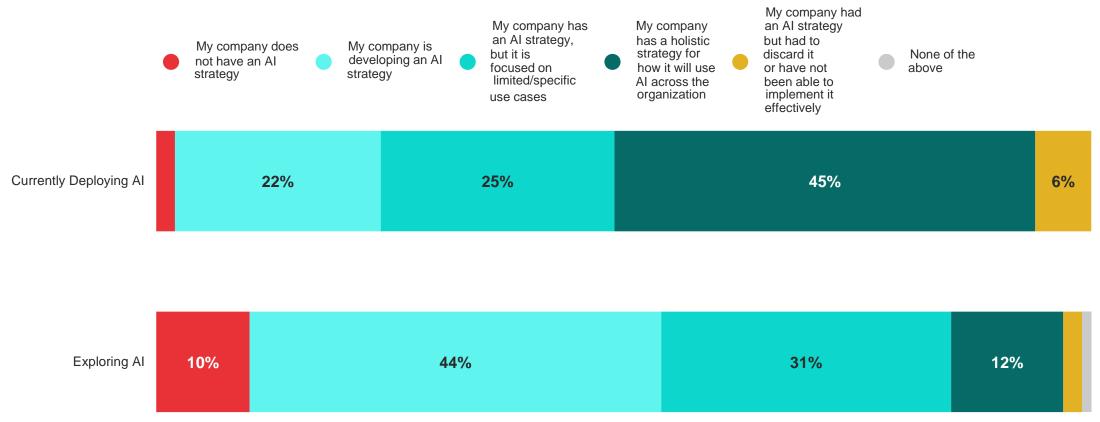
AI'S IMPACT ON EMPLOYEES

Most companies actively exploring or deploying AI have some form of AI strategy, with 29% reporting that their company has an AI strategy for limited/specific use cases and a quarter stating that their organization already has a holistic strategy in place. 35% 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]**
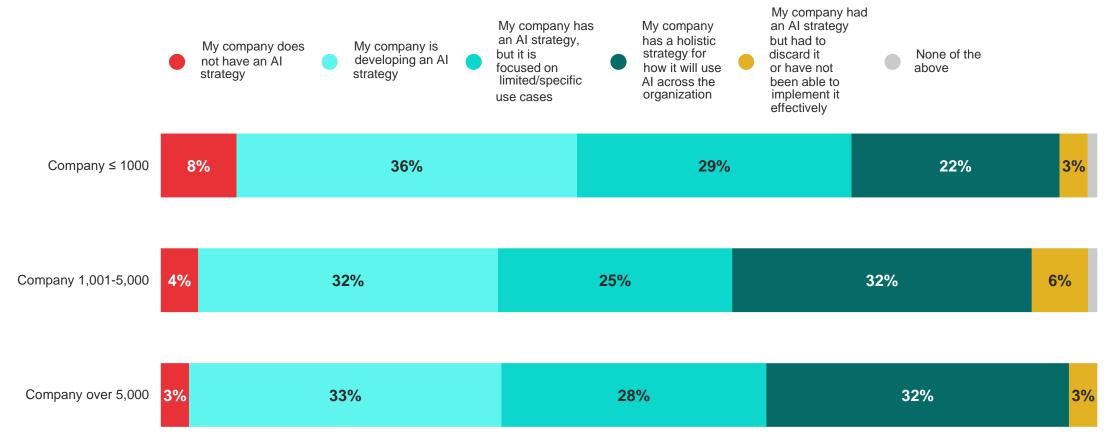
Legend:
- ● My company does not have an AI strategy
- ● My company is developing an AI strategy
- ● My company has an AI strategy, but it is focused on limited/specific use cases
- ● My company has a holistic strategy for how it will use AI across the organization
- ● My company had an AI strategy but had to discard it or have not been able to implement it effectively
- ● None of the above

Country	Does not have	Developing	Limited/specific	Holistic	Had to discard	None
Global	7%	35%	29%	25%	4%	
Australia	7%	42%	29%	20%		
Canada	8%	41%	25%	21%		
China		31%	27%	39%		
France	12%	35%	30%	20%		
Germany	8%	38%	29%	21%		
India		28%	26%	34%	9%	
Italy	8%	39%	30%	20%		
Japan	10%	29%	31%	26%		
Singapore	5%	32%	26%	29%	7%	
South Korea	7%	22%	36%	31%		
Spain	6%	39%	29%	22%		
UAE	4%	30%	30%	34%		
UK	8%	40%	27%	19%	6%	
US	10%	39%	24%	19%	6%	
LATAM	6%	39%	30%	21%	4%	

DRIVERS & BARRIERS OF AI

Companies exploring AI are more likely to be in the beginning stages of AI strategy, while 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]**

● My company does not have an AI strategy

● My company is developing an AI strategy

● My company has an AI strategy, but it is focused on limited/specific use cases

● My company has a holistic strategy for how it will use AI across the organization

● My company had an AI strategy but had to discard it or have not been able to implement it effectively

● None of the above

Currently Deploying AI

| 22% | 25% | 45% | 6% |

Exploring AI

| 10% | 44% | 31% | 12% |

Larger organizations exploring or deploying AI are more likely than smaller organizations to have a holistic AI strategy in place.

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

Legend:
- 🔴 My company does not have an AI strategy
- My company is developing an AI strategy
- My company has an AI strategy, but it is focused on limited/specific use cases
- My company has a holistic strategy for how it will use AI across the organization
- 🟡 My company had an AI strategy but had to discard it or have not been able to implement it effectively
- ⚪ None of the above

Company ≤ 1000
| 8% | 36% | 29% | 22% | 3% | |

Company 1,001-5,000
| 4% | 32% | 25% | 32% | 6% | |

Company over 5,000
| 3% | 33% | 28% | 32% | 3% | |

DRIVERS & BARRIERS OF AI

Advances in AI making it more accessible (43%) is the top external driver of AI adoption at companies currently exploring or deploying AI, followed by the need to reduce costs and automate key processes (38%) and the increasing amount of AI embedded into standard off the shelf business applications (34%).

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	Australia	Canada	China	France	Germany	India	Italy	Japan	Singapore	South Korea	Spain	UAE	UK	US	LATAM
Advances in AI that make it more accessible	43%	40%	38%	42%	38%	44%	57%	34%	41%	46%	45%	38%	47%	38%	39%	50%
Need to reduce costs and automate key processes	38%	34%	39%	34%	28%	39%	47%	30%	46%	45%	51%	36%	39%	31%	35%	40%
The increasing amount of AI embedded into standard off the shelf business applications	34%	28%	28%	47%	27%	39%	46%	27%	24%	42%	19%	32%	40%	27%	27%	40%
Competitive pressure	28%	33%	31%	26%	21%	29%	39%	26%	20%	39%	22%	22%	37%	31%	30%	22%
Labor or skills shortages	23%	28%	28%	20%	16%	33%	33%	14%	42%	26%	23%	11%	24%	23%	28%	11%
Directives from leadership	21%	21%	21%	24%	16%	16%	28%	15%	11%	29%	19%	17%	29%	18%	25%	23%
Pressure from consumers	21%	19%	17%	25%	18%	16%	32%	16%	13%	29%	16%	16%	32%	19%	20%	24%
Company culture	20%	17%	17%	23%	18%	22%	23%	19%	15%	22%	15%	20%	22%	17%	25%	22%
Environmental pressures	17%	13%	14%	22%	12%	15%	25%	12%	11%	22%	17%	14%	28%	19%	15%	12%
Supply chain issues	16%	20%	16%	22%	12%	16%	23%	6%	15%	21%	17%	10%	22%	17%	18%	8%
Legal and regulatory compliance pressures	15%	13%	12%	15%	17%	19%	20%	12%	14%	22%	14%	12%	17%	16%	17%	10%
Demands due to the Covid-19 pandemic	13%	11%	9%	18%	8%	12%	22%	5%	12%	21%	12%	11%	15%	12%	10%	13%
None of the above	1%	2%	2%	2%	2%	1%	1%	1%	2%	1%	1%	2%	0%	3%	3%	1%
Other	0%	1%	1%	0%	0%	0%	1%	1%	1%	1%	0%	1%	0%	0%	0%	1%

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

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DRIVERS & BARRIERS OF AI

Compared to AI projects 2 to 3 years ago, IT Professionals consider AI tailored solutions (39%), accessible AI solutions (39%), and the increased prevalence of data, AI, and automation skills (36%) 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	Australia	Canada	China	France	Germany	India	Italy	Japan	Singapore	South Korea	Spain	UAE	UK	US	LATAM
AI solutions are better designed to fit the needs of businesses	39%	35%	34%	49%	31%	36%	51%	32%	26%	46%	35%	36%	49%	28%	37%	47%
AI solutions are more accessible and easier to deploy	39%	37%	39%	45%	36%	36%	51%	32%	35%	43%	37%	36%	50%	31%	37%	44%
Data, AI and automation skills are more prevalent, teams are positioned to build, deploy, and manage AI	36%	32%	30%	51%	25%	29%	48%	23%	25%	49%	43%	36%	48%	29%	33%	35%
Businesses have clear data and AI strategies	28%	24%	21%	36%	20%	30%	39%	22%	18%	35%	25%	25%	41%	23%	22%	32%
Businesses have ethical guidelines in place for their AI adoption	23%	24%	21%	33%	19%	21%	36%	17%	23%	27%	18%	18%	31%	27%	21%	18%
Don't know/Not sure	9%	11%	14%	2%	12%	10%	1%	9%	24%	4%	13%	6%	2%	13%	13%	4%
Other	0%	0%	1%	0%	0%	0%	0%	0%	1%	0%	1%	1%	0%	0%	1%	1%

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

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Barriers to successful AI adoption have stayed consistent from April, although high prices was less likely to be a hinderance in November (April '23 28% vs. Nov. '23 23%).

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]**

Barrier	Nov. 2023	Apr. 2023
We have limited AI skills, expertise or knowledge	33%	32%
We have a lack of tools/platforms for developing AI models	23%	24%
The price is too high	23%	28%
We have too much data complexity	21%	21%
AI projects are too complex or difficult to integrate and scale	21%	23%
We have ethical concerns	20%	17%
We do not have a holistic AI strategy in place	17%	17%
We do not have the ability to properly govern our AI models	16%	16%
We do not have the use cases defined or the end user research needed to get started	15%	16%
We are locked-in to one vendor (AI and Cloud tied to one single vendor)	13%	15%
Nothing is technically hindering successful AI adoption for my business	9%	8%
None of the above	3%	3%
Other	0%	0%

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

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Despite the increased prevalence in AI related skills, IT Professionals at companies exploring or deploying AI are most likely to express that limited AI skills and expertise (33%) are hindering successful AI adoption. Just under 25% respectively also say that lack of tools for AI model development (23%) and high costs (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	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%	36%	37%	30%	25%	32%	36%	27%	41%	38%	42%	22%	35%	34%	32%	31%
The price is too high	23%	28%	26%	18%	18%	17%	25%	21%	24%	28%	32%	18%	27%	25%	24%	20%
We have a lack of tools/platforms for developing AI models	23%	22%	18%	24%	18%	20%	30%	19%	24%	28%	33%	26%	29%	23%	14%	22%
AI projects are too complex or difficult to integrate and scale	21%	17%	18%	25%	14%	20%	28%	15%	21%	32%	30%	19%	27%	18%	15%	18%
We have too much data complexity	21%	18%	18%	27%	14%	21%	26%	16%	27%	27%	23%	19%	22%	19%	20%	16%
We have ethical concerns	20%	23%	19%	20%	22%	24%	28%	13%	19%	24%	16%	12%	22%	19%	22%	15%
We do not have a holistic AI strategy in place	17%	18%	15%	20%	10%	22%	15%	9%	29%	21%	25%	14%	24%	14%	16%	12%
We do not have the ability to properly govern our AI models	16%	13%	18%	19%	12%	12%	17%	10%	31%	16%	17%	16%	21%	15%	13%	10%
We do not have the use cases defined or the end user research needed to get started	15%	10%	15%	19%	14%	17%	20%	11%	18%	18%	16%	13%	17%	13%	14%	13%
We are locked-in to one vendor (AI and Cloud tied to one single vendor)	13%	11%	10%	17%	13%	14%	19%	9%	11%	15%	9%	11%	19%	16%	12%	13%
Nothing is technically hindering successful AI adoption for my business	9%	9%	9%	13%	9%	8%	10%	9%	2%	9%	1%	11%	8%	7%	12%	12%
None of the above	3%	3%	4%	2%	2%	3%	4%	4%	2%	4%	1%	1%	1%	2%	5%	2%
Other	0%	0%	0%	0%	1%	1%	0%	0%	1%	1%	1%	0%	0%	0%	0%	0%

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

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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 "9%," this indicates that 9% of IT Professionals identified limited AI skills and lack of tools as a barrier.
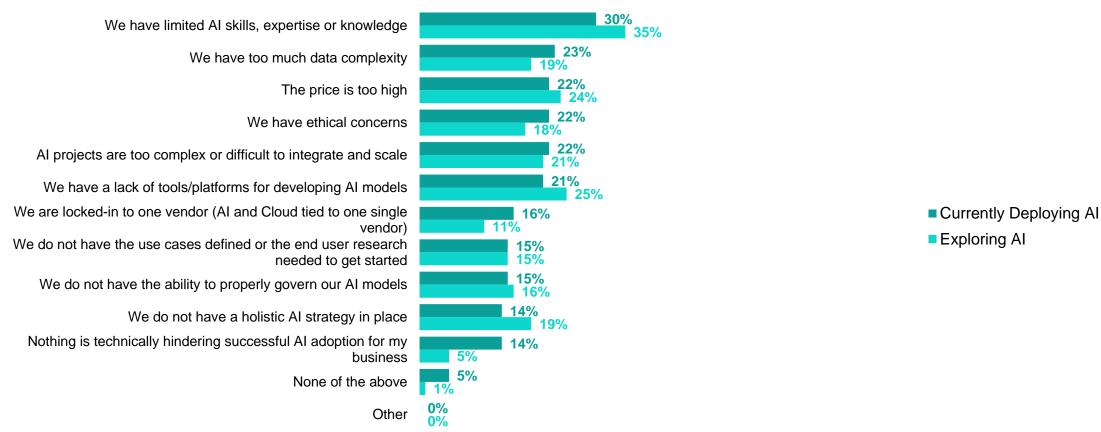
Statements		We do not have the use cases defined or the end user research needed to get started	We do not have a holistic AI strategy in place	We have too much data complexity	We have limited AI skills, expertise or knowledge	We have a lack of tools/ platforms for developing AI models	We are locked-in 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
	Overall Selection	15%	17%	21%	33%	23%	13%	23%	20%	21%
We do not have a holistic AI strategy in place	17%	4%								
We have too much data complexity	21%	4%	4%							
We have limited AI skills, expertise or knowledge	33%	5%	6%	7%						
We have a lack of tools/platforms for developing AI models	23%	4%	5%	6%	9%					
We are locked-in to one vendor (AI and Cloud tied to one single vendor)	13%	3%	2%	3%	4%	3%				
The price is too high	23%	3%	4%	5%	8%	6%	3%			
We have ethical concerns	20%	4%	4%	5%	6%	5%	3%	5%		
AI projects are too complex or difficult to integrate and scale	21%	4%	4%	5%	7%	6%	3%	6%	5%	
We do not have the ability to properly govern our AI models	16%	3%	4%	4%	5%	5%	3%	4%	4%	4%

- For most IT Professionals globally at companies deploying or exploring AI, lack of skill is the main obstacle for success to adopt AI (33%).

  - Those who report **lack of skill** are also **more likely to report other hinderances**, mainly **lack of tools and high prices**.

  - Those who say they are **locked into a vendor are less likely to report other reasons**.

- On average, IT professionals select approximately **2 barriers to successful AI adoption**.

Note: dark green shading indicates the most selected additional barrier while light green shading indicates the least selected additional barrier

Companies exploring AI are more likely than those deploying AI to experience issues with limited AI expertise and with lack of tools for AI model development.

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]**

Barrier	Currently Deploying AI	Exploring AI
We have limited AI skills, expertise or knowledge	30%	35%
We have too much data complexity	23%	19%
The price is too high	22%	24%
We have ethical concerns	22%	18%
AI projects are too complex or difficult to integrate and scale	22%	21%
We have a lack of tools/platforms for developing AI models	21%	25%
We are locked-in to one vendor (AI and Cloud tied to one single vendor)	16%	11%
We do not have the use cases defined or the end user research needed to get started	15%	15%
We do not have the ability to properly govern our AI models	15%	16%
We do not have a holistic AI strategy in place	14%	19%
Nothing is technically hindering successful AI adoption for my business	14%	5%
None of the above	5%	1%
Other	0%	0%

■ Currently Deploying AI
■ Exploring AI

Ethical concerns are the top hinderance to successful AI adoption at French and German companies currently deploying AI. IT Professionals in Spain and LATAM are more likely to report that nothing is technically hindering 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	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%	31%	32%	24%	21%	26%	32%	23%	42%	33%	40%	19%	36%	35%	27%	23%
We have too much data complexity	23%	20%	18%	30%	11%	22%	30%	18%	30%	27%	27%	18%	22%	20%	23%	13%
The price is too high	22%	30%	24%	15%	14%	20%	21%	19%	22%	24%	27%	19%	27%	23%	26%	17%
We have ethical concerns	22%	25%	17%	21%	27%	27%	27%	12%	22%	26%	13%	13%	26%	25%	21%	17%
AI projects are too complex or difficult to integrate and scale	22%	16%	21%	21%	11%	16%	28%	15%	21%	30%	34%	22%	26%	23%	19%	19%
We have a lack of tools/platforms for developing AI models	21%	15%	15%	16%	14%	20%	29%	17%	25%	28%	31%	20%	26%	26%	12%	15%
We are locked-in to one vendor (AI and Cloud tied to one single vendor)	16%	12%	12%	11%	21%	22%	19%	9%	19%	19%	13%	9%	25%	21%	16%	14%
We do not have the use cases defined or the end user research needed to get started	15%	13%	14%	16%	15%	17%	22%	6%	19%	17%	18%	8%	13%	14%	13%	8%
We do not have the ability to properly govern our AI models	15%	6%	21%	15%	15%	14%	16%	7%	29%	16%	19%	13%	19%	18%	15%	6%
We do not have a holistic AI strategy in place	14%	16%	12%	17%	5%	22%	13%	5%	24%	19%	14%	6%	23%	10%	11%	8%
Nothing is technically hindering successful AI adoption for my business	14%	10%	13%	23%	19%	11%	13%	15%	2%	13%	2%	24%	9%	8%	18%	23%
None of the above	5%	5%	10%	3%	4%	7%	5%	11%	2%	6%	4%	3%	1%	2%	8%	4%
Other	0%	1%	0%	0%	1%	0%	0%	0%	1%	0%	0%	1%	0%	1%	0%	0%

Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market
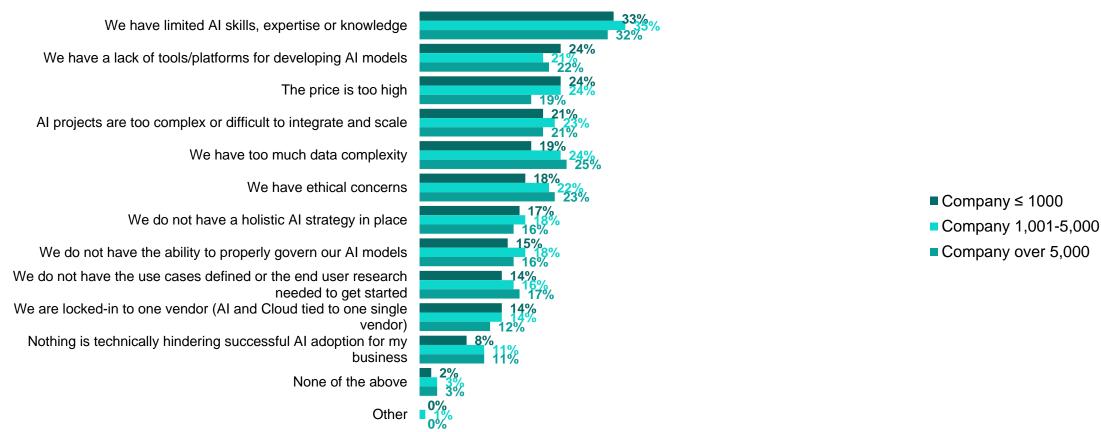
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Across nearly all countries, limited AI skills is the top challenge companies exploring AI face as they pursue successful AI Adoption.

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

	Global	Australia	Canada	China	France	Germany	India	Italy	Japan	Singapore	South Korea	Spain	UAE	UK	US	LATAM
We have limited AI skills, expertise or knowledge	35%	38%	40%	36%	28%	35%	42%	29%	40%	44%	43%	23%	35%	34%	34%	35%
We have a lack of tools/platforms for developing AI models	25%	26%	19%	33%	19%	20%	32%	20%	23%	29%	34%	28%	31%	21%	15%	27%
The price is too high	24%	27%	27%	22%	20%	15%	31%	22%	26%	31%	34%	18%	26%	26%	22%	22%
AI projects are too complex or difficult to integrate and scale	21%	18%	16%	30%	16%	22%	28%	14%	21%	34%	29%	18%	28%	16%	13%	18%
We do not have a holistic AI strategy in place	19%	19%	17%	23%	12%	22%	17%	11%	31%	23%	30%	16%	26%	16%	19%	14%
We have too much data complexity	19%	16%	17%	23%	15%	20%	21%	16%	25%	26%	22%	19%	23%	18%	18%	18%
We have ethical concerns	18%	22%	21%	18%	19%	23%	28%	13%	18%	21%	17%	12%	18%	16%	22%	14%
We do not have the ability to properly govern our AI models	16%	16%	16%	23%	10%	12%	18%	11%	32%	15%	16%	17%	23%	13%	13%	12%
We do not have the use cases defined or the end user research needed to get started	15%	9%	15%	22%	13%	17%	16%	13%	17%	18%	15%	15%	20%	13%	14%	15%
We are locked-in to one vendor (AI and Cloud tied to one single vendor)	11%	10%	8%	23%	9%	9%	17%	10%	6%	12%	7%	12%	12%	13%	10%	13%
Nothing is technically hindering successful AI adoption for my business	5%	8%	7%	1%	5%	7%	5%	6%	2%	4%	1%	6%	6%	6%	8%	6%
None of the above	1%	2%	1%	0%	1%	1%	2%	2%	2%	1%	0%	1%	0%	2%	3%	0%
Other	0%	0%	0%	0%	0%	1%	1%	0%	0%	1%	1%	0%	0%	0%	0%	1%

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

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Companies with more than 1,000 employees currently exploring or deploying AI are more likely than smaller organizations to face challenges such as too much data complexity and ethical concerns. The high cost of AI adoption is less likely to be a concern at company with 5,000+ employees.

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]**

Barrier	Company ≤ 1000	Company 1,001-5,000	Company over 5,000
We have limited AI skills, expertise or knowledge	33%	35%	32%
We have a lack of tools/platforms for developing AI models	24%	21%	22%
The price is too high	24%	24%	19%
AI projects are too complex or difficult to integrate and scale	21%	23%	21%
We have too much data complexity	19%	24%	25%
We have ethical concerns	18%	22%	23%
We do not have a holistic AI strategy in place	17%	18%	16%
We do not have the ability to properly govern our AI models	15%	18%	16%
We do not have the use cases defined or the end user research needed to get started	14%	16%	17%
We are locked-in to one vendor (AI and Cloud tied to one single vendor)	14%	14%	12%
Nothing is technically hindering successful AI adoption for my business	8%	11%	11%
None of the above	2%	3%	3%
Other	0%	1%	0%

■ Company ≤ 1000
■ Company 1,001-5,000
■ Company over 5,000

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Data privacy concerns (44%) and lack of skills for implementation (43%) are the biggest inhibitors of generative AI according to IT Professionals at organizations not exploring or implementing generative AI. 37% also say that trust/transparency concerns 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]**

	Global	Australia	Canada	**China	France	*Germany	**India	Italy	Japan	*Singapore	South Korea	Spain	**UAE	UK	US	LATAM
Data privacy concerns	44%	53%	49%	56%	40%	59%	56%	39%	38%	57%	30%	38%	49%	52%	45%	43%
Lack of skills to implement it	43%	46%	40%	44%	36%	42%	31%	46%	45%	40%	48%	37%	36%	45%	44%	44%
Trust/transparency concerns	37%	31%	46%	28%	36%	44%	31%	21%	45%	31%	43%	37%	40%	33%	41%	35%
Other	5%	6%	7%	6%	7%	5%	3%	7%	2%	3%	4%	7%	2%	7%	8%	5%

Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market
*Sample size is between 50 and 99
**Sample size is < 50, please interpret with caution

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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 companies exploring or deploying the technology, the most common applications are IT process automation (25%) and marketing and sales (24%).

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	Australia	Canada	China	France	Germany	India	Italy	Japan	Singapore	South Korea	Spain	UAE	UK	US	LATAM
Automation of IT Processes	25%	17%	22%	33%	16%	22%	43%	21%	18%	30%	25%	22%	37%	19%	18%	24%
Marketing and Sales	24%	23%	20%	18%	21%	22%	22%	19%	18%	27%	21%	20%	29%	21%	24%	37%
Digital labor	22%	15%	17%	23%	20%	30%	23%	22%	8%	20%	16%	28%	21%	13%	16%	37%
Security and Threat Detection	22%	19%	18%	22%	18%	19%	31%	13%	28%	25%	18%	17%	29%	19%	20%	24%
Automate customer/employee self-service answers and actions	20%	15%	18%	23%	19%	18%	29%	12%	19%	23%	21%	17%	24%	16%	17%	22%
Automate processing, understanding and flow of documents	20%	17%	18%	23%	22%	20%	26%	18%	27%	29%	25%	15%	22%	14%	14%	17%
Business Analytics or Intelligence	20%	19%	20%	24%	16%	17%	29%	19%	12%	27%	16%	17%	24%	17%	16%	20%
AI Monitoring and Governance	19%	14%	16%	25%	18%	23%	34%	13%	20%	24%	19%	9%	24%	15%	17%	16%
Search and Knowledge Discovery	19%	12%	16%	20%	12%	23%	31%	11%	22%	23%	21%	14%	23%	11%	19%	18%
Automation of Business Processes	18%	15%	17%	24%	15%	24%	25%	18%	16%	30%	15%	19%	19%	13%	13%	14%
Financial Planning and Analysis	18%	15%	13%	15%	14%	18%	27%	15%	15%	20%	15%	18%	23%	21%	16%	20%
Fraud Detection	18%	19%	18%	14%	18%	18%	27%	14%	18%	20%	6%	18%	22%	17%	18%	21%
Automation of Network Processes	17%	11%	15%	24%	12%	15%	26%	12%	15%	26%	15%	13%	22%	12%	14%	17%
Human Resources and Talent Acquisition	17%	15%	17%	16%	14%	18%	26%	12%	16%	20%	10%	15%	25%	19%	17%	17%
Supply Chain Intelligence	16%	14%	14%	17%	12%	20%	20%	11%	9%	25%	9%	16%	21%	13%	14%	17%
Code generation	15%	15%	12%	20%	14%	17%	23%	11%	14%	19%	10%	13%	18%	11%	11%	16%
Sensor Data Analysis (Internet of Things)	15%	14%	11%	21%	11%	8%	23%	9%	15%	20%	13%	12%	23%	11%	12%	18%
Predictive Decision Making	14%	12%	17%	16%	12%	10%	20%	8%	13%	16%	13%	14%	15%	10%	16%	16%
Visual Recognition	14%	12%	11%	17%	13%	16%	20%	12%	5%	14%	11%	13%	17%	13%	13%	17%
Sustainability	10%	6%	8%	10%	7%	8%	22%	6%	7%	12%	10%	5%	16%	6%	7%	9%
Healthcare Diagnostics	9%	8%	7%	13%	8%	7%	13%	7%	7%	9%	8%	7%	11%	10%	16%	6%
Environmental Risk Analysis	8%	7%	9%	11%	7%	6%	20%	6%	7%	9%	5%	7%	11%	8%	4%	6%
None of the above	5%	9%	10%	2%	4%	6%	1%	5%	5%	3%	3%	4%	1%	9%	11%	2%
Other	0%	1%	0%	0%	0%	1%	0%	0%	0%	0%	1%	0%	0%	1%	1%	0%

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

Industries leverage AI and automation for sector-specific needs; for example, the financial services sector is most likely to be using AI for financial planning and analysis.

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	Financial Services Industry	Telecommun- ications Industry	Media & Entertainment Industry	Government Industry	Energy, Environment, Utility Industry	Automotive Industry	Chemicals/ Oil/Gas Industry	Industrial Industry	Healthcare Industry	Retail Industry	Aerospace/ Defense Industry**	Travel & Trans- portation Industry
Automation of IT Processes	25%	27%	26%	22%	13%	17%	24%	27%	26%	18%	19%		19%
Marketing and Sales	24%	25%	29%	34%	11%	26%	19%	24%	25%	19%	36%		32%
Digital labor	22%	27%	27%	29%	19%	22%	15%	27%	22%	20%	21%		16%
Security and Threat Detection	22%	25%	21%	20%	19%	19%	16%	26%	26%	21%	17%		19%
Business Analytics or Intelligence	20%	22%	18%	21%	16%	18%	23%	15%	21%	15%	19%		23%
Automate processing, understanding and flow of documents	20%	20%	19%	19%	20%	12%	19%	30%	24%	20%	17%		16%
Automate customer/employee self-service answers and actions	20%	24%	23%	20%	16%	22%	22%	25%	19%	16%	19%		23%
Search and Knowledge Discovery	19%	20%	16%	24%	23%	19%	15%	17%	19%	19%	16%		20%
AI Monitoring and Governance	19%	24%	22%	19%	17%	23%	15%	14%	20%	17%	17%		18%
Automation of Business Processes	18%	23%	20%	19%	16%	17%	21%	22%	23%	12%	14%		14%
Financial Planning and Analysis	18%	30%	16%	15%	15%	16%	13%	21%	20%	17%	18%		18%
Fraud Detection	18%	24%	22%	18%	18%	16%	11%	20%	19%	20%	19%		21%
Automation of Network Processes	17%	19%	18%	15%	12%	16%	23%	19%	19%	11%	13%		15%
Human Resources and Talent Acquisition	17%	17%	15%	18%	17%	26%	13%	17%	20%	23%	15%		18%
Supply Chain Intelligence	16%	14%	17%	16%	8%	14%	14%	15%	21%	15%	18%		21%
Code generation	15%	14%	16%	15%	12%	13%	15%	16%	15%	12%	12%		11%
Sensor Data Analysis (Internet of Things)	15%	16%	16%	14%	15%	19%	17%	20%	18%	15%	13%		13%
Visual Recognition	14%	13%	15%	13%	14%	17%	18%	18%	14%	18%	15%		15%
Predictive Decision Making	14%	17%	14%	13%	9%	17%	10%	14%	16%	13%	11%		12%
Sustainability	10%	12%	6%	9%	7%	9%	9%	11%	13%	7%	9%		7%
Healthcare Diagnostics	9%	8%	7%	8%	9%	8%	9%	14%	9%	35%	7%		13%
Environmental Risk Analysis	8%	10%	7%	8%	6%	12%	7%	14%	13%	8%	7%		9%
None of the above	5%	5%	4%	4%	5%	3%	5%	1%	4%	5%	6%		3%
Other	0%	0%	0%	1%	1%	0%	0%	0%	0%	0%	0%		1%

**Sample size less than 50
Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific industry
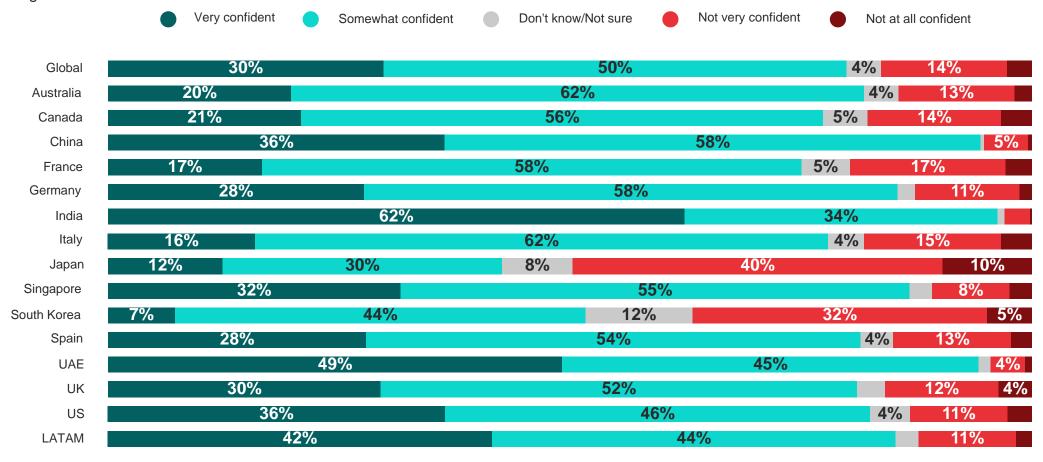
CURRENT USES OF AI

Notably, IT Professionals lead the way, emerging as the primary group engaging with AI within these organizations (46%).

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	Australia	Canada	China	France	Germany	India	Italy	Japan	Singapore	South Korea	Spain	UAE	UK	US	LATAM
IT Professionals	46%	39%	43%	49%	22%	53%	65%	34%	37%	58%	39%	42%	61%	41%	43%	48%
Data engineers	27%	22%	21%	32%	22%	22%	38%	19%	24%	36%	26%	26%	42%	22%	20%	29%
Developers and data scientists	24%	16%	21%	32%	20%	19%	34%	24%	21%	30%	24%	21%	34%	21%	17%	24%
Customer service professionals	23%	20%	28%	22%	19%	26%	30%	14%	17%	23%	22%	15%	36%	18%	23%	27%
Marketing professionals	23%	18%	20%	24%	18%	19%	25%	16%	16%	26%	18%	20%	30%	18%	24%	35%
Security professionals	20%	16%	16%	21%	24%	15%	30%	11%	24%	24%	18%	18%	25%	12%	17%	21%
HR professionals	19%	19%	16%	20%	23%	18%	23%	13%	14%	25%	8%	16%	24%	20%	25%	17%
Sales professionals	19%	17%	19%	23%	19%	15%	21%	16%	15%	24%	12%	17%	24%	18%	20%	24%
Finance professionals	18%	15%	16%	22%	15%	14%	29%	12%	8%	26%	9%	17%	23%	21%	19%	22%
Product managers	18%	19%	17%	18%	19%	20%	23%	12%	16%	24%	17%	17%	19%	19%	21%	15%
Sustainability professionals and operations managers	15%	12%	12%	24%	11%	10%	23%	10%	14%	20%	15%	11%	21%	10%	11%	12%
External consultants	12%	8%	10%	15%	12%	13%	13%	18%	7%	15%	11%	12%	13%	14%	13%	9%
Legal professionals	9%	8%	7%	16%	7%	8%	9%	6%	8%	10%	5%	7%	11%	11%	11%	10%
Site Reliability Engineers (SREs)	8%	5%	5%	11%	7%	7%	13%	6%	6%	12%	5%	4%	8%	7%	5%	8%
None of the above	6%	12%	12%	3%	5%	8%	2%	7%	6%	4%	6%	7%	3%	12%	14%	3%
Other	1%	2%	1%	0%	1%	1%	0%	1%	1%	0%	0%	1%	0%	1%	1%	1%

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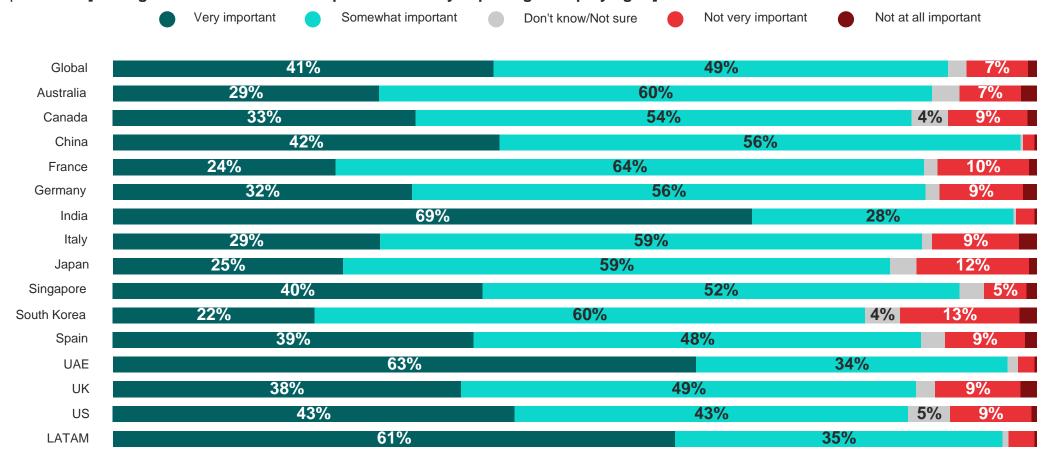
MORNING CONSULT®

IT Professionals are confident that their company has the right tools in place to find data across the business (80% confident), with 30% 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?

● Very confident ● Somewhat confident ● Don't know/Not sure ● Not very confident ● Not at all confident

	Very confident	Somewhat confident	Don't know/Not sure	Not very confident
Global	30%	50%	4%	14%
Australia	20%	62%	4%	13%
Canada	21%	56%	5%	14%
China	36%	58%		5%
France	17%	58%	5%	17%
Germany	28%	58%		11%
India	62%	34%		
Italy	16%	62%	4%	15%
Japan	12%	30%	8%	40% (Not very confident) / 10% (Not at all)
Singapore	32%	55%		8%
South Korea	7%	44%	12%	32% / 5%
Spain	28%	54%	4%	13%
UAE	49%	45%		4%
UK	30%	52%		12% / 4%
US	36%	46%	4%	11%
LATAM	42%	44%		11%

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MORNING CONSULT®

And according to 90% of IT Professionals at organizations exploring or deploying AI, running AI projects wherever data resides is important, with 41% 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]**

● Very important   ● Somewhat important   ● Don't know/Not sure   ● Not very important   ● Not at all important

	Very important	Somewhat important	Don't know/Not sure	Not very important
Global	41%	49%		7%
Australia	29%	60%		7%
Canada	33%	54%	4%	9%
China	42%	56%		
France	24%	64%		10%
Germany	32%	56%		9%
India	69%	28%		
Italy	29%	59%		9%
Japan	25%	59%		12%
Singapore	40%	52%		5%
South Korea	22%	60%	4%	13%
Spain	39%	48%		9%
UAE	63%	34%		
UK	38%	49%		9%
US	43%	43%	5%	9%
LATAM	61%	35%		

AI ADOPTION & INVESTMENTS

DRIVERS & BARRIERS OF AI

CURRENT USES OF AI

AI ETHICS AND RESPONSIBILITY

AI'S IMPACT ON EMPLOYEES

AI ETHICS AND RESPONSIBILITY
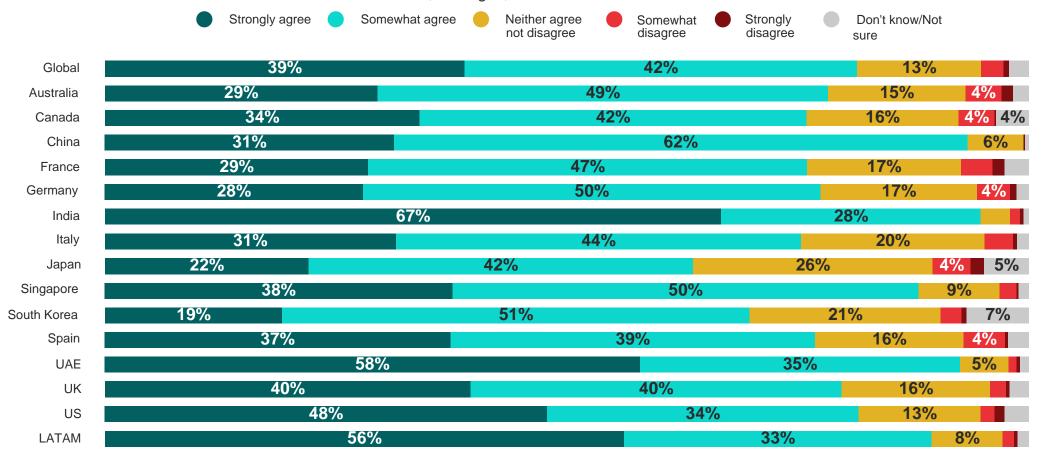
IT Professionals are largely in agreement that consumers are more likely to choose services from companies with transparent and ethical AI practices.

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.

● Strongly agree　● Somewhat agree　● Neither agree not disagree　● Somewhat disagree　● Strongly disagree　● Don't know/Not sure

Country	Strongly agree	Somewhat agree	Neither agree not disagree
Global	39%	42%	13%
Australia	29%	49%	15% (4%)
Canada	34%	42%	16% (4%) (4%)
China	31%	62%	6%
France	29%	47%	17%
Germany	28%	50%	17% (4%)
India	67%	28%	
Italy	31%	44%	20%
Japan	22%	42%	26% (4%) 5%
Singapore	38%	50%	9%
South Korea	19%	51%	21% 7%
Spain	37%	39%	16% (4%)
UAE	58%	35%	5%
UK	40%	40%	16%
US	48%	34%	13%
LATAM	56%	33%	8%

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AI ETHICS AND RESPONSIBILITY

And while businesses value various aspects of trust and explainability in their AI operations, maintaining brand integrity among customers is considered the most important.

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	Australia	Canada	China	France	Germany	India	Italy	Japan	Singapore	South Korea	Spain	UAE	UK	US	LATAM
Maintaining the integrity of your brand and the trust of your customers	81%	75%	80%	82%	79%	78%	87%	76%	73%	78%	74%	78%	89%	82%	79%	91%
Having the ability to monitor data and AI across the entire lifecycle	80%	75%	81%	80%	76%	78%	88%	75%	68%	77%	74%	77%	85%	80%	79%	88%
Having the ability to govern data and AI across the entire lifecycle	79%	74%	77%	80%	77%	77%	86%	73%	68%	81%	73%	79%	85%	77%	78%	90%
Meeting external regulatory and compliance obligations	79%	79%	80%	78%	77%	73%	86%	76%	72%	78%	67%	78%	86%	78%	80%	89%
Meeting internal reporting obligations	79%	75%	78%	77%	75%	75%	88%	71%	71%	78%	67%	76%	85%	80%	78%	87%
Ensuring your applications and services minimize bias	77%	77%	75%	75%	70%	73%	84%	71%	64%	78%	71%	78%	85%	77%	76%	87%

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

At companies using AI, over 80% of IT professionals globally consider each aspect of trust and explainability in AI important to their business.

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	Australia	Canada	China	France	Germany	India	Italy	Japan	Singapore	South Korea	Spain	UAE	UK	US	LATAM
Meeting external regulatory and compliance obligations	84%	85%	83%	83%	81%	77%	90%	78%	72%	79%	69%	84%	90%	88%	87%	92%
Maintaining the integrity of your brand and the trust of your customers	84%	79%	86%	86%	77%	84%	90%	78%	73%	81%	69%	84%	91%	88%	88%	92%
Having the ability to monitor data and AI across the entire lifecycle	84%	81%	84%	86%	77%	80%	91%	81%	70%	81%	71%	79%	90%	88%	82%	91%
Having the ability to govern data and AI across the entire lifecycle	84%	83%	82%	85%	80%	79%	90%	79%	71%	81%	76%	80%	90%	84%	85%	93%
Meeting internal reporting obligations	83%	80%	82%	82%	76%	81%	92%	77%	74%	81%	72%	83%	88%	87%	85%	91%
Ensuring your applications and services minimize bias	82%	80%	77%	82%	71%	82%	88%	78%	64%	81%	71%	82%	88%	84%	85%	89%

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

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IT Professionals at companies 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	Australia	Canada	China	France	Germany	India	Italy	Japan	Singapore	South Korea	Spain	UAE	UK	US	LATAM
Maintaining the integrity of your brand and the trust of your customers	78%	72%	77%	78%	80%	74%	82%	75%	72%	76%	76%	76%	86%	78%	75%	91%
Having the ability to monitor data and AI across the entire lifecycle	77%	71%	78%	73%	75%	77%	85%	73%	66%	73%	74%	77%	79%	76%	78%	86%
Meeting external regulatory and compliance obligations	76%	75%	78%	73%	75%	71%	80%	74%	72%	77%	66%	77%	81%	72%	75%	87%
Having the ability to govern data and AI across the entire lifecycle	76%	69%	76%	73%	76%	76%	78%	70%	67%	80%	72%	78%	79%	72%	73%	88%
Meeting internal reporting obligations	75%	73%	77%	72%	76%	72%	81%	68%	70%	74%	64%	75%	82%	78%	74%	86%
Ensuring your applications and services minimize bias	74%	75%	73%	68%	70%	67%	80%	69%	65%	75%	71%	77%	82%	73%	71%	86%

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

Most companies exploring or deploying AI are already working to ensure trustworthy and responsible AI. Safeguarding data privacy through the entire lifecycle is the most common way businesses 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	Australia	Canada	China	France	Germany	India	Italy	Japan	Singapore	South Korea	Spain	UAE	UK	US	LATAM
Safeguarding data privacy through the entire lifecycle	42%	42%	40%	39%	38%	42%	52%	36%	30%	45%	30%	40%	48%	43%	42%	47%
Developing ethical AI policies	40%	38%	41%	44%	32%	36%	50%	32%	33%	47%	31%	33%	47%	36%	39%	45%
Making sure we can explain AI-powered decisions	39%	37%	44%	37%	32%	42%	50%	29%	36%	47%	36%	30%	45%	38%	38%	40%
Monitoring AI across cloud and AI environments	39%	37%	35%	42%	33%	38%	57%	29%	29%	44%	37%	34%	49%	33%	36%	45%
Guarding against adversarial threats and potential incursions to keep systems healthy	35%	29%	26%	41%	37%	40%	39%	29%	27%	39%	26%	34%	45%	28%	30%	41%
Tracking data provenance, changes in data and model versions	35%	30%	31%	36%	29%	37%	48%	31%	31%	41%	33%	28%	39%	34%	34%	35%
Tracking performance variations/model drift	28%	33%	32%	28%	24%	22%	41%	20%	19%	35%	19%	23%	29%	27%	32%	29%
Reducing unintended bias	26%	27%	30%	29%	20%	27%	34%	14%	22%	37%	19%	20%	31%	27%	25%	23%
None of the above	4%	7%	7%	1%	3%	5%	0%	4%	7%	2%	6%	4%	0%	3%	8%	2%
Other	0%	0%	0%	0%	0%	1%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%

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

Companies deploying AI are most likely to be monitoring AI across cloud and AI environments.

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	Australia	Canada	China	France	Germany	India	Italy	Japan	Singapore	South Korea	Spain	UAE	UK	US	LATAM
Monitoring AI across cloud and AI environments	48%	43%	44%	45%	45%	49%	58%	37%	41%	51%	45%	47%	51%	42%	44%	53%
Safeguarding data privacy through the entire lifecycle	45%	44%	42%	43%	47%	47%	51%	42%	33%	46%	39%	42%	49%	48%	41%	49%
Developing ethical AI policies	44%	41%	39%	49%	50%	39%	49%	42%	33%	48%	37%	34%	47%	40%	41%	51%
Making sure we can explain AI-powered decisions	43%	44%	48%	39%	37%	46%	52%	35%	41%	51%	28%	39%	42%	36%	43%	47%
Guarding against adversarial threats and potential incursions to keep systems healthy	41%	33%	35%	44%	41%	46%	43%	33%	33%	45%	34%	40%	48%	32%	33%	50%
Tracking data provenance, changes in data and model versions	40%	29%	33%	45%	34%	45%	49%	35%	41%	47%	40%	30%	40%	37%	39%	37%
Tracking performance variations/model drift	33%	37%	31%	33%	25%	28%	44%	24%	25%	39%	25%	31%	29%	38%	40%	34%
Reducing unintended bias	28%	24%	31%	30%	21%	29%	33%	12%	26%	39%	19%	24%	30%	30%	27%	26%
None of the above	2%	5%	4%	2%	1%	1%	0%	2%	5%	2%	1%	1%	0%	1%	3%	1%
Other	0%	1%	0%	0%	0%	1%	0%	0%	1%	0%	0%	1%	0%	0%	1%	0%

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

Companies exploring AI are most likely to be safeguarding data privacy through the entire lifecycle 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	Australia	Canada	China	France	Germany	India	Italy	Japan	Singapore	South Korea	Spain	UAE	UK	US	LATAM
Safeguarding data privacy through the entire lifecycle	39%	42%	39%	35%	34%	38%	53%	33%	28%	45%	27%	40%	47%	41%	43%	45%
Developing ethical AI policies	37%	37%	42%	40%	24%	34%	52%	28%	33%	45%	28%	33%	46%	33%	38%	42%
Making sure we can explain AI-powered decisions	36%	34%	41%	35%	30%	39%	47%	27%	33%	41%	39%	27%	48%	39%	35%	36%
Monitoring AI across cloud and AI environments	34%	33%	31%	39%	28%	32%	55%	25%	22%	37%	34%	29%	47%	28%	32%	40%
Tracking data provenance, changes in data and model versions	31%	31%	30%	25%	26%	33%	47%	29%	25%	34%	30%	27%	37%	32%	31%	33%
Guarding against adversarial threats and potential incursions to keep systems healthy	31%	26%	22%	37%	36%	36%	32%	27%	23%	33%	22%	32%	42%	26%	29%	36%
Reducing unintended bias	24%	29%	30%	28%	20%	26%	35%	16%	20%	35%	19%	18%	32%	26%	24%	21%
Tracking performance variations/model drift	24%	30%	32%	22%	23%	19%	38%	18%	16%	31%	17%	20%	29%	21%	27%	25%
None of the above	5%	8%	8%	0%	3%	7%	1%	5%	8%	1%	8%	5%	1%	4%	10%	2%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

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, companies' primary hurdles are inadequate skill sets and lack of an AI strategy.

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	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%	48%	53%	35%	54%	49%	62%	50%	44%	50%	54%	54%	55%	59%	52%	60%
Lack of an AI strategy	51%	47%	49%	40%	51%	44%	60%	47%	44%	49%	57%	53%	54%	54%	52%	55%
AI governance and management tools that do not work across all data environments	49%	46%	49%	37%	48%	44%	59%	48%	36%	47%	48%	52%	50%	55%	48%	56%
AI outcomes that are not explainable	49%	46%	51%	40%	47%	44%	58%	52%	44%	46%	52%	48%	52%	53%	50%	56%
Lack of regulatory guidance from governments or industry	49%	43%	47%	43%	46%	41%	60%	46%	41%	45%	51%	52%	52%	52%	48%	57%
AI vendors who don't include explainability features	48%	44%	42%	40%	49%	47%	58%	47%	38%	45%	46%	53%	50%	50%	45%	56%
Lack of company guidelines for developing trustworthy, ethical AI	48%	47%	46%	33%	48%	43%	58%	47%	41%	47%	43%	51%	53%	58%	50%	55%
Building models on data that has inherent bias (social, economic, etc.)	45%	42%	42%	38%	44%	37%	57%	40%	39%	45%	49%	47%	48%	50%	43%	48%

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

Unexplainable AI outcomes is one of the largest barriers that companies deploying AI face in developing trustworthy AI, tying with lack of skills.

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]**

	Adults	Australia	Canada	China	France	Germany	India	Italy	Japan	Singapore	South Korea	Spain	UAE	UK	US	LATAM
AI outcomes that are not explainable	47%	40%	50%	36%	47%	43%	59%	36%	39%	41%	47%	40%	50%	55%	58%	52%
Lack of skills/training to develop and manage trustworthy AI	47%	42%	45%	31%	55%	47%	59%	35%	43%	41%	45%	42%	53%	62%	56%	53%
Lack of an AI strategy	46%	41%	42%	36%	45%	41%	59%	34%	38%	45%	49%	42%	49%	53%	50%	50%
Lack of regulatory guidance from governments or industry	46%	44%	45%	37%	45%	40%	60%	32%	38%	38%	53%	41%	49%	49%	49%	52%
AI governance and management tools that do not work across all data environments	45%	38%	42%	35%	43%	40%	61%	35%	30%	41%	42%	51%	46%	56%	48%	51%
Lack of company guidelines for developing trustworthy, ethical AI	44%	43%	40%	30%	47%	36%	58%	34%	37%	37%	38%	50%	51%	54%	53%	49%
AI vendors who don't include explainability features	44%	40%	37%	32%	42%	40%	56%	34%	30%	38%	45%	49%	48%	54%	50%	50%
Building models on data that has inherent bias (social, economic, etc.)	42%	38%	35%	33%	41%	36%	62%	31%	35%	41%	45%	40%	49%	48%	41%	42%

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

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Companies 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	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	55%	52%	57%	40%	54%	50%	67%	57%	45%	60%	58%	58%	56%	57%	50%	63%
Lack of an AI strategy	54%	49%	54%	45%	53%	46%	62%	53%	47%	52%	61%	58%	59%	55%	52%	58%
Lack of company guidelines for developing trustworthy, ethical AI	51%	49%	48%	38%	49%	48%	58%	52%	44%	57%	45%	52%	55%	60%	48%	58%
AI outcomes that are not explainable	51%	49%	51%	45%	48%	44%	56%	60%	47%	50%	55%	51%	53%	52%	45%	58%
AI governance and management tools that do not work across all data environments	51%	51%	53%	39%	51%	46%	57%	53%	40%	54%	50%	52%	53%	54%	47%	59%
Lack of regulatory guidance from governments or industry	51%	43%	48%	50%	46%	43%	60%	52%	44%	52%	49%	56%	55%	53%	48%	61%
AI vendors who don't include explainability features	51%	46%	44%	48%	53%	52%	62%	54%	44%	54%	45%	54%	52%	48%	42%	59%
Building models on data that has inherent bias (social, economic, etc.)	46%	44%	47%	43%	46%	38%	51%	45%	41%	49%	50%	48%	46%	50%	45%	52%

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

AI ADOPTION & INVESTMENTS

DRIVERS & BARRIERS OF AI

CURRENT USES OF AI

AI ETHICS AND RESPONSIBILITY

AI'S IMPACT ON EMPLOYEES

AI and automation are more likely to have various positive impacts on employees, with just over a quarter of IT Professionals reporting that their organization is training employees to collaborate with new AI and automation software (27%) and that employees are excited to work with new AI and automation software/tools (26%).

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

	Global	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.	27%	23%	21%	34%	16%	25%	43%	21%	20%	38%	24%	27%	37%	24%	21%	31%
Employees at my organization are excited to work with new AI and automation software/tools.	26%	24%	24%	38%	20%	16%	42%	15%	17%	30%	26%	21%	39%	19%	21%	31%
Employees at my organization are saving time with new AI and automation software/tools.	25%	25%	21%	33%	20%	26%	41%	18%	22%	36%	17%	20%	37%	18%	22%	27%
My organization is using AI and automation software/tools to advance how employees work and expand the job functions they perform.	24%	21%	19%	34%	14%	25%	40%	14%	18%	35%	23%	19%	34%	18%	24%	22%
My organization does not have employees with the right skills to use new AI and automation software/tools.	20%	19%	22%	23%	22%	20%	18%	20%	28%	21%	22%	17%	17%	22%	19%	15%
My organization is now able to help perform core job functions with new AI and automation software/tools.	20%	18%	19%	26%	14%	17%	35%	14%	15%	31%	23%	14%	29%	15%	15%	19%
Employees at my organization are hesitant to work with new AI and automation software/tools.	18%	20%	19%	19%	19%	19%	21%	13%	14%	19%	16%	13%	19%	22%	25%	13%
My organization cannot find new hires with the right skills to work with new AI and automation software/tools.	15%	12%	15%	22%	12%	18%	17%	11%	21%	18%	15%	10%	15%	13%	12%	11%
None of the above	8%	10%	12%	3%	6%	8%	1%	8%	18%	4%	10%	6%	2%	10%	15%	4%
Other	1%	1%	1%	0%	1%	1%	1%	1%	0%	0%	0%	1%	0%	1%	1%	1%

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

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23% 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 (52%) 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	Australia	Canada	*China	*France	Germany	India	*Italy	Japan	Singapore	*South Korea	**Spain	UAE	*UK	US	*LATAM
Using automation tools to reduce manual or repetitive tasks	52%	55%	55%	51%	46%	52%	63%	38%	41%	57%	48%	44%	59%	57%	52%	53%
Using AI to automate customer self-service answers and actions	47%	38%	44%	47%	41%	42%	61%	37%	34%	64%	53%	36%	62%	29%	43%	57%
Using AI to improve recruiting and human resources	41%	33%	39%	43%	41%	42%	58%	31%	29%	42%	45%	40%	48%	35%	47%	33%
Using AI-powered education solutions to increase employee learning and training	41%	42%	35%	42%	38%	40%	56%	37%	37%	42%	51%	38%	45%	33%	34%	43%
Using low-code/no-code tools to address skills gaps	32%	33%	32%	40%	27%	18%	37%	31%	23%	45%	20%	42%	43%	37%	23%	29%
Using AI to automate discovery of information in documents and other natural language text/audio sources	29%	22%	21%	32%	27%	36%	43%	29%	26%	31%	23%	22%	32%	18%	22%	37%
None of the above	4%	5%	4%	4%	0%	7%	1%	0%	15%	2%	2%	4%	0%	3%	5%	1%
Other	0%	0%	1%	0%	0%	0%	0%	0%	2%	0%	0%	0%	0%	0%	0%	0%

Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market
*Sample size is between 50 and 99
**Sample size is < 50, please interpret with caution

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IBM GLOBAL AI ADOPTION INDEX

APPENDIX

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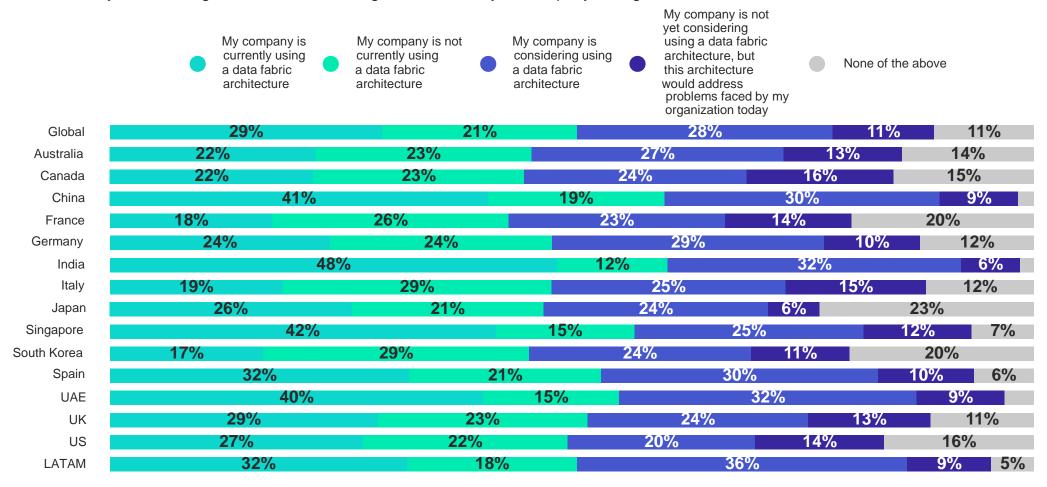
Globally, companies are most likely to be using a private cloud environment (43%).

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

● Public cloud   ● Private cloud   ● On-premises   ● A mix of the above, e.g. hybrid cloud (mix of public cloud, private cloud and on-premises from multiple vendors) or multicloud (mix of public cloud services from multiple vendors)   ● Don't know/Not sure

	Public cloud	Private cloud	On-premises	A mix	Don't know
Global	17%	43%	8%	26%	7%
Australia	11%	42%	9%	29%	8%
Canada	13%	39%	10%	30%	8%
China	23%	32%	11%	34%	
France	10%	50%	13%	20%	8%
Germany	13%	37%		37%	9%
India	18%	42%		35%	
Italy	15%	61%	5%	13%	6%
Japan	27%	23%	9%	19%	21%
Singapore	14%	34%	8%	41%	
South Korea	44%	25%	5%	13%	14%
Spain	9%	56%	9%	21%	5%
UAE	20%	34%	11%	32%	4%
UK	17%	44%	10%	24%	6%
US	16%	47%	10%	20%	8%
LATAM	8%	57%	10%	23%	
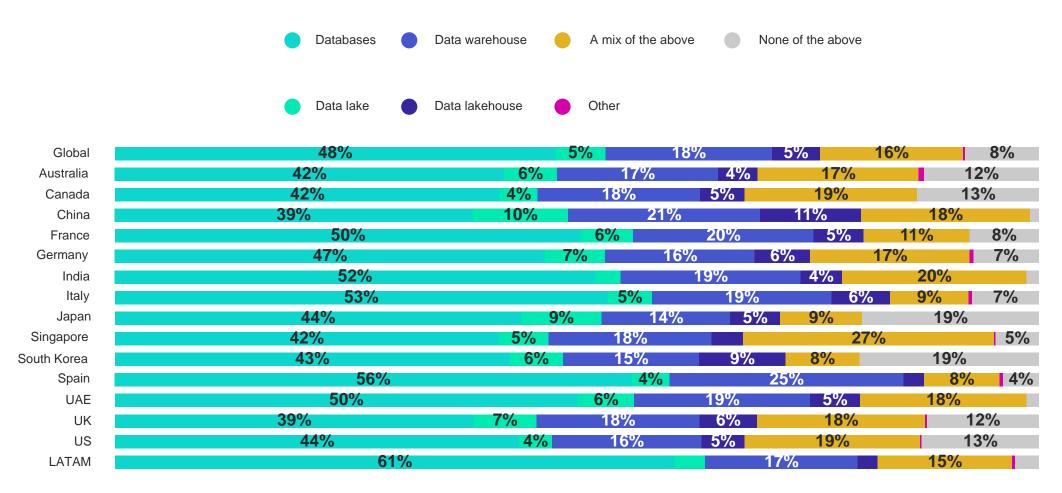
29% of IT Professionals report that their company is currently using a data fabric architecture, while 28% are considering using a data fabric architecture.

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

- My company is currently using a data fabric architecture
- My company is not currently using a data fabric architecture
- My company is considering using a data fabric architecture
- My company is not yet considering using a data fabric architecture, but this architecture would address problems faced by my organization today
- None of the above

	Currently using	Not currently using	Considering using	Not yet considering	None of the above
Global	29%	21%	28%	11%	11%
Australia	22%	23%	27%	13%	14%
Canada	22%	23%	24%	16%	15%
China	41%	19%	30%	9%	
France	18%	26%	23%	14%	20%
Germany	24%	24%	29%	10%	12%
India	48%	12%	32%	6%	
Italy	19%	29%	25%	15%	12%
Japan	26%	21%	24%	6%	23%
Singapore	42%	15%	25%	12%	7%
South Korea	17%	29%	24%	11%	20%
Spain	32%	21%	30%	10%	6%
UAE	40%	15%	32%	9%	
UK	29%	23%	24%	13%	11%
US	27%	22%	20%	14%	16%
LATAM	32%	18%	36%	9%	5%

Companies are most likely to be using databases (48%). Nearly 1 in 5 IT Professionals (18%) report their company is using a data warehouse.

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

● Databases   ● Data warehouse   ● A mix of the above   ● None of the above

● Data lake   ● Data lakehouse   ● Other

	Databases	Data lake	Data warehouse	Data lakehouse	A mix of the above	Other	None of the above
Global	48%	5%	18%	5%	16%		8%
Australia	42%	6%	17%	4%	17%		12%
Canada	42%	4%	18%	5%	19%		13%
China	39%	10%	21%	11%	18%		
France	50%	6%	20%	5%	11%		8%
Germany	47%	7%	16%	6%	17%		7%
India	52%		19%	4%	20%		
Italy	53%	5%	19%	6%	9%		7%
Japan	44%	9%	14%	5%	9%		19%
Singapore	42%	5%	18%		27%		5%
South Korea	43%	6%	15%	9%	8%		19%
Spain	56%	4%	25%		8%		4%
UAE	50%	6%	19%	5%	18%		
UK	39%	7%	18%	6%	18%		12%
US	44%	4%	16%	5%	19%		13%
LATAM	61%		17%		15%		

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Most organizations (63%) are using 20 or more data sources to inform AI, BI, and analytics systems according to IT Professionals.
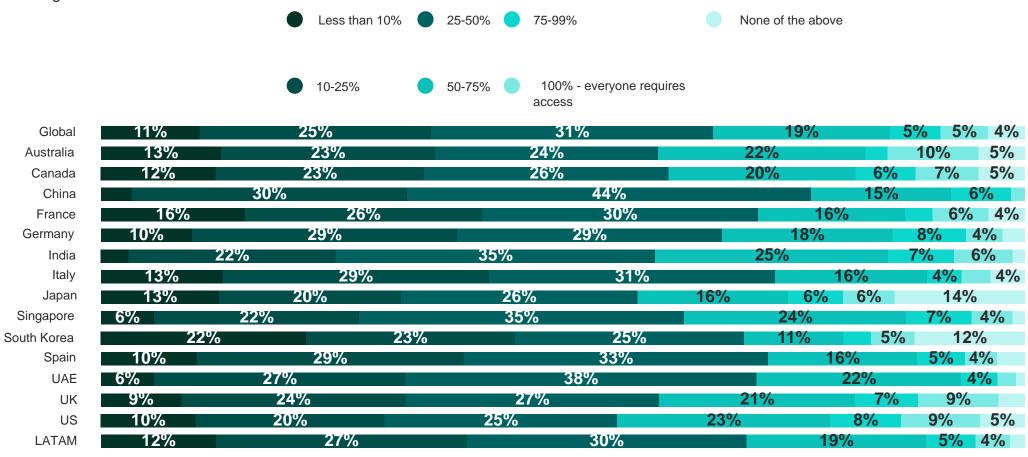
How many different data sources is your company drawing from to inform your AI, business intelligence (BI), and analytics systems (i.e., databases, data stores, data warehouses, data lakes, IoT, content libraries, external internet, and social media sources, etc.)?

● Less than 20   ● 51-100   ● 501-1000   ● Don't know/Not sure

● 20-50   ● 101-500   ● More than 1000

	Less than 20	20-50	51-100	101-500	501-1000	More than 1000	Don't know/Not sure
Global	19%	19%	16%	14%	9%	5%	19%
Australia	18%	18%	15%	13%	7%		26%
Canada	25%	16%	13%	11%	5%	4%	26%
China	11%	28%	24%	17%	10%	8%	
France	17%	20%	14%	11%	7%	5%	26%
Germany	16%	17%	21%	12%	11%	5%	18%
India	11%	20%	17%	18%	19%	10%	5%
Italy	18%	18%	17%	14%	7%	4%	22%
Japan	23%	14%	14%	8%	4%		34%
Singapore	13%	20%	19%	20%	11%	5%	11%
South Korea	20%	15%	13%	11%	6%	4%	32%
Spain	20%	24%	16%	11%	5%		21%
UAE	11%	17%	17%	26%	17%	4%	9%
UK	18%	16%	17%	16%	10%	4%	20%
US	24%	15%	11%	15%	10%	5%	20%
LATAM	26%	23%	15%	12%	6%	5%	13%

Accessible data is critical to organizations, as 60% of IT Professionals report that 25% or more of their company 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?
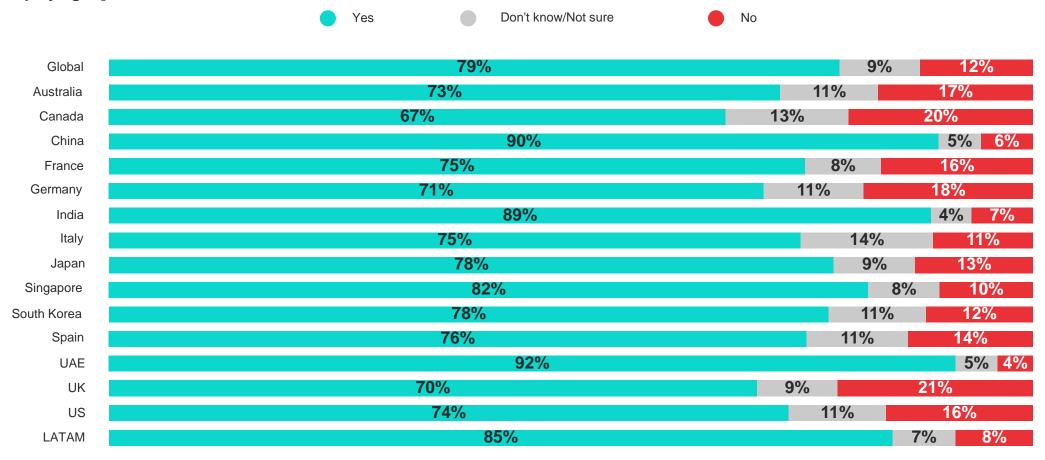
● Less than 10%   ● 25-50%   ● 75-99%   ● None of the above

● 10-25%   ● 50-75%   ● 100% - everyone requires access

	Less than 10%	10-25%	25-50%	50-75%	75-99%	100%	None of the above
Global	11%	25%	31%	19%	5%	5%	4%
Australia	13%	23%	24%	22%	10%	5%	
Canada	12%	23%	26%	20%	6%	7%	5%
China	30%		44%	15%	6%		
France	16%	26%	30%	16%	6%	4%	
Germany	10%	29%	29%	18%	8%	4%	
India	22%	35%	25%	7%	6%		
Italy	13%	29%	31%	16%	4%	4%	
Japan	13%	20%	26%	16%	6%	6%	14%
Singapore	6%	22%	35%	24%	7%	4%	
South Korea	22%	23%	25%	11%	5%	12%	
Spain	10%	29%	33%	16%	5%	4%	
UAE	6%	27%	38%	22%	4%		
UK	9%	24%	27%	21%	7%	9%	
US	10%	20%	25%	23%	8%	9%	5%
LATAM	12%	27%	30%	19%	5%	4%	

The predominant issue companies face with organizational data management is ensuring data security, with 41% of IT Professionals 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	Australia	Canada	China	France	Germany	India	Italy	Japan	Singapore	South Korea	Spain	UAE	UK	US	LATAM
Ensuring data security	41%	39%	41%	38%	44%	38%	44%	32%	44%	44%	50%	43%	37%	43%	38%	37%
Ensuring data governance, compliance and privacy	36%	34%	38%	33%	35%	35%	40%	32%	42%	36%	43%	37%	34%	42%	34%	33%
Integrating data across any cloud	35%	33%	37%	30%	28%	36%	42%	26%	42%	36%	43%	37%	32%	38%	33%	33%
Managing disparate data sources and formats	33%	34%	35%	23%	32%	32%	40%	27%	43%	36%	40%	39%	25%	37%	32%	30%
Data discoverability	31%	30%	30%	28%	31%	30%	38%	23%	32%	32%	34%	36%	30%	36%	34%	25%
Moving data	29%	29%	27%	33%	30%	23%	34%	19%	34%	32%	24%	32%	30%	35%	31%	27%
Copying data from different sources	28%	30%	27%	31%	27%	24%	33%	20%	35%	31%	29%	27%	26%	32%	27%	26%
Granting appropriate data access to users	28%	24%	26%	23%	25%	29%	37%	25%	40%	28%	28%	27%	29%	37%	27%	20%

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

Explainable AI is a top company concern. 79% of IT Professionals at companies 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]**

● Yes   ● Don't know/Not sure   ● No

	Yes	Don't know/Not sure	No
Global	79%	9%	12%
Australia	73%	11%	17%
Canada	67%	13%	20%
China	90%	5%	6%
France	75%	8%	16%
Germany	71%	11%	18%
India	89%	4%	7%
Italy	75%	14%	11%
Japan	78%	9%	13%
Singapore	82%	8%	10%
South Korea	78%	11%	12%
Spain	76%	11%	14%
UAE	92%	5%	4%
UK	70%	9%	21%
US	74%	11%	16%
LATAM	85%	7%	8%

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Only 9% of IT Professionals report that their company 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	Australia	Canada	China	France	Germany	India	Italy	Japan	Singapore	South Korea	Spain	UAE	UK	US	LATAM
Customer care/customer service	31%	27%	30%	33%	24%	33%	44%	25%	17%	37%	36%	28%	35%	22%	26%	38%
Security	31%	29%	25%	31%	29%	30%	40%	28%	26%	36%	23%	30%	37%	24%	25%	39%
Business development	27%	22%	24%	37%	21%	22%	43%	30%	19%	34%	20%	22%	38%	21%	20%	27%
Marketing	27%	20%	21%	28%	22%	22%	27%	23%	24%	32%	26%	26%	38%	19%	27%	38%
Sales	26%	25%	24%	27%	21%	22%	30%	25%	19%	31%	17%	26%	30%	18%	25%	37%
Human resources or employee services	25%	20%	25%	31%	19%	23%	35%	19%	22%	34%	19%	21%	31%	21%	25%	25%
Finance	22%	17%	19%	29%	19%	20%	36%	13%	14%	28%	14%	22%	24%	24%	22%	28%
Market research	22%	19%	19%	30%	16%	15%	32%	16%	15%	26%	20%	19%	35%	18%	19%	27%
Supply chain or procurement	20%	19%	17%	33%	15%	21%	26%	11%	14%	33%	17%	15%	28%	13%	17%	20%
Corporate governance or ESG	16%	13%	13%	26%	11%	12%	23%	14%	14%	26%	13%	13%	26%	15%	13%	14%
Legal or compliance	16%	17%	14%	28%	13%	13%	20%	9%	14%	21%	13%	18%	18%	16%	16%	17%
My company is not currently using or considering the use of natural language processing applications	9%	15%	16%	2%	9%	13%	3%	8%	17%	6%	11%	8%	3%	14%	17%	4%
None of the above	3%	4%	4%	2%	4%	4%	1%	3%	6%	1%	6%	3%	1%	5%	5%	2%
Other	0%	1%	0%	0%	2%	1%	1%	0%	1%	0%	0%	0%	0%	0%	0%	0%

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

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Cost is the biggest barrier to natural language processing technology adoption internationally (50%).

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	Australia	Canada	China	France	Germany	India	Italy	Japan	Singapore	South Korea	Spain	UAE	UK	US	LATAM
The technology is too expensive	50%	46%	52%	39%	56%	39%	54%	43%	47%	46%	65%	52%	51%	45%	49%	57%
It is too complex or difficult to use	45%	36%	40%	34%	48%	43%	52%	43%	48%	40%	55%	44%	51%	46%	41%	48%
Difficult to keep the technology up to date	44%	34%	53%	35%	50%	32%	51%	40%	48%	45%	47%	44%	47%	51%	37%	42%
Requires too much training time to be relevant	44%	39%	39%	36%	46%	38%	53%	40%	48%	41%	52%	45%	45%	46%	42%	42%
The AI models aren't explainable	44%	38%	42%	36%	50%	39%	56%	44%	48%	38%	42%	44%	45%	49%	36%	44%
My organization does not have the skills required to use or deploy it	42%	38%	46%	31%	46%	34%	48%	36%	49%	41%	47%	43%	44%	47%	35%	45%
Cannot be customized on the specific domain of my business	41%	41%	33%	35%	43%	37%	52%	31%	46%	36%	43%	41%	47%	47%	39%	43%
Requires too much compute	41%	35%	43%	39%	42%	30%	48%	35%	41%	41%	50%	44%	44%	45%	34%	43%
Not enough support for different languages and dialects	40%	35%	34%	38%	42%	29%	53%	34%	47%	36%	55%	34%	41%	34%	34%	43%
Do not know how to incorporate into my business or have a use case for it	39%	36%	34%	41%	44%	25%	49%	27%	44%	36%	49%	41%	36%	42%	35%	40%
I can't trust the outcomes of the models	39%	42%	41%	29%	41%	33%	43%	29%	40%	36%	43%	43%	44%	41%	39%	42%

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

Most IT Professionals indicate their company is using AI to improve customer and employee care in some way, with 31% globally saying their company uses AI to improve 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	Australia	Canada	China	France	Germany	India	Italy	Japan	Singapore	South Korea	Spain	UAE	UK	US	LATAM
Improve customer service agent productivity	31%	24%	34%	35%	28%	26%	52%	22%	26%	40%	19%	28%	41%	22%	25%	35%
Streamline how customers or employees find information or resolve frequently asked questions	29%	24%	22%	38%	19%	25%	43%	24%	24%	35%	29%	28%	36%	21%	25%	34%
Survey or feedback analysis	29%	32%	28%	30%	20%	26%	47%	21%	20%	39%	30%	23%	39%	29%	24%	28%
Create a more personalized experience for customers and employees	28%	24%	22%	34%	21%	25%	47%	22%	17%	37%	20%	25%	38%	18%	23%	35%
Decrease call wait times	25%	20%	25%	28%	20%	26%	31%	21%	15%	27%	13%	25%	31%	19%	21%	36%
Email or text classification	25%	27%	25%	26%	24%	34%	38%	17%	20%	28%	22%	19%	31%	20%	22%	24%
More targeted or personalized advertising	24%	20%	20%	29%	22%	23%	38%	18%	15%	29%	12%	21%	32%	18%	22%	32%
Address labor or staffing shortages	22%	16%	17%	28%	19%	23%	31%	17%	27%	28%	27%	18%	28%	18%	18%	16%
Identify new revenue streams or cross-sell/up-sell opportunities	21%	17%	16%	31%	20%	13%	35%	14%	14%	27%	15%	20%	31%	17%	20%	24%
Manage increasing call center volume	21%	17%	19%	24%	17%	18%	32%	16%	17%	25%	16%	19%	28%	18%	18%	22%
Sentiment analysis	16%	14%	12%	25%	12%	16%	24%	13%	11%	24%	8%	21%	23%	15%	13%	14%
My company is not using AI to improve customer and employee care	11%	16%	18%	2%	14%	15%	1%	14%	18%	5%	15%	11%	3%	17%	19%	6%
None of the above	3%	4%	4%	1%	4%	3%	1%	4%	6%	2%	5%	3%	1%	3%	5%	3%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	1%	0%	0%

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Cost savings (28%) are the biggest reason why companies globally are currently using or considering automation software or tools.

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

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While companies are interested in various types of automation software/tools, business process automation (70%) and network performance management (70%) are the most popular applications.

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

	Global	Australia	Canada	China	France	Germany	India	Italy	Japan	Singapore	South Korea	Spain	UAE	UK	US	LATAM
Business process automation	70%	66%	63%	81%	61%	71%	87%	67%	51%	78%	64%	72%	80%	62%	65%	79%
Network performance management	70%	63%	63%	77%	62%	67%	87%	63%	55%	77%	64%	70%	81%	62%	66%	78%
Digital labor	69%	63%	59%	79%	68%	75%	84%	67%	43%	70%	58%	74%	81%	60%	58%	83%
Integration	69%	65%	62%	80%	57%	66%	84%	65%	52%	76%	65%	72%	80%	65%	65%	77%
Intelligent Document Processing / Understanding	69%	66%	61%	81%	65%	71%	86%	65%	49%	75%	64%	67%	82%	62%	62%	78%
Multicloud network management	65%	61%	56%	78%	58%	61%	84%	56%	47%	72%	56%	67%	78%	61%	59%	72%
Automated decision management	64%	57%	53%	77%	56%	59%	83%	55%	48%	72%	55%	67%	78%	58%	59%	71%
Hybrid cloud cost optimization tools	64%	58%	58%	80%	53%	61%	84%	55%	45%	73%	56%	65%	77%	60%	59%	70%
Enterprise observability	63%	54%	54%	76%	56%	65%	84%	58%	40%	72%	50%	62%	80%	57%	55%	70%
AIOps (AI for IT Operations)	62%	56%	50%	79%	52%	64%	85%	55%	43%	72%	45%	62%	77%	57%	53%	70%
API management	62%	57%	50%	79%	53%	59%	83%	54%	47%	72%	53%	63%	79%	52%	53%	68%
Robotic process automation	61%	56%	51%	77%	56%	56%	77%	55%	43%	72%	52%	65%	74%	53%	53%	67%
Event streaming	58%	55%	47%	74%	46%	54%	79%	53%	39%	63%	45%	58%	72%	54%	55%	69%
Process mining	58%	50%	47%	76%	64%	57%	75%	46%	43%	65%	50%	54%	74%	52%	55%	61%

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Companies are most likely to be using or considering using automation for IT process automation (27%).

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

	Global	Australia	Canada	China	France	Germany	India	Italy	Japan	Singapore	South Korea	Spain	UAE	UK	US	LATAM
Automating IT processes	27%	24%	27%	29%	17%	31%	43%	21%	19%	36%	21%	25%	37%	23%	24%	29%
Automating customer care experiences	22%	22%	21%	22%	16%	24%	33%	17%	12%	26%	20%	20%	28%	15%	19%	29%
Automating IT or software asset management	21%	16%	18%	25%	13%	18%	34%	17%	16%	28%	17%	21%	30%	18%	17%	22%
Automating sales processes	20%	20%	18%	18%	14%	22%	24%	16%	14%	25%	18%	20%	25%	15%	16%	29%
Cloud cost optimization	20%	19%	17%	18%	17%	21%	28%	16%	20%	24%	18%	17%	22%	16%	16%	23%
Monitoring network performance	20%	19%	22%	19%	18%	18%	29%	14%	16%	26%	15%	15%	23%	15%	17%	26%
Real-time inventory management	20%	20%	18%	21%	18%	22%	28%	16%	21%	21%	23%	22%	23%	13%	19%	21%
Automating AI and data governance processes	19%	16%	15%	27%	15%	15%	30%	16%	15%	26%	11%	17%	26%	15%	14%	20%
Automating business processes and workflows	19%	15%	16%	23%	17%	18%	30%	12%	14%	26%	10%	20%	24%	13%	15%	24%
Automating HR processes	19%	17%	21%	19%	17%	17%	24%	14%	16%	24%	12%	17%	26%	17%	17%	20%
Automating network processes	19%	16%	15%	20%	14%	19%	27%	15%	13%	24%	18%	20%	20%	14%	20%	25%
Augmenting employees with digital labor	18%	16%	17%	19%	13%	24%	24%	16%	10%	22%	19%	15%	22%	11%	14%	22%
Monitoring application performance	18%	19%	16%	19%	17%	17%	24%	14%	14%	23%	12%	20%	21%	14%	18%	23%
Reducing energy consumption of IT systems	18%	14%	14%	22%	17%	19%	33%	17%	11%	24%	11%	18%	20%	13%	10%	22%
5G networking and/or network slicing	17%	14%	11%	20%	12%	14%	37%	13%	10%	21%	8%	19%	21%	14%	16%	17%
Automating risk and compliance management processes	17%	13%	12%	22%	15%	15%	29%	13%	12%	22%	10%	17%	20%	11%	14%	20%
Proactive IT incident management	17%	17%	16%	21%	14%	18%	28%	12%	9%	24%	12%	17%	22%	15%	15%	19%
Managing application performance across hybrid and multiclouds	15%	13%	12%	18%	13%	12%	26%	11%	13%	22%	10%	15%	18%	13%	12%	17%
Managing network performance for applications across hybrid and multiclouds	15%	14%	12%	18%	11%	14%	27%	11%	11%	24%	10%	13%	18%	15%	14%	16%
Automating ESG reporting	13%	10%	9%	15%	11%	13%	18%	11%	8%	18%	10%	15%	18%	12%	9%	13%
Managing edge applications	12%	12%	11%	20%	10%	14%	20%	7%	8%	17%	9%	9%	15%	11%	11%	9%
None of the above	10%	13%	16%	2%	12%	9%	2%	12%	21%	5%	15%	7%	3%	15%	16%	5%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

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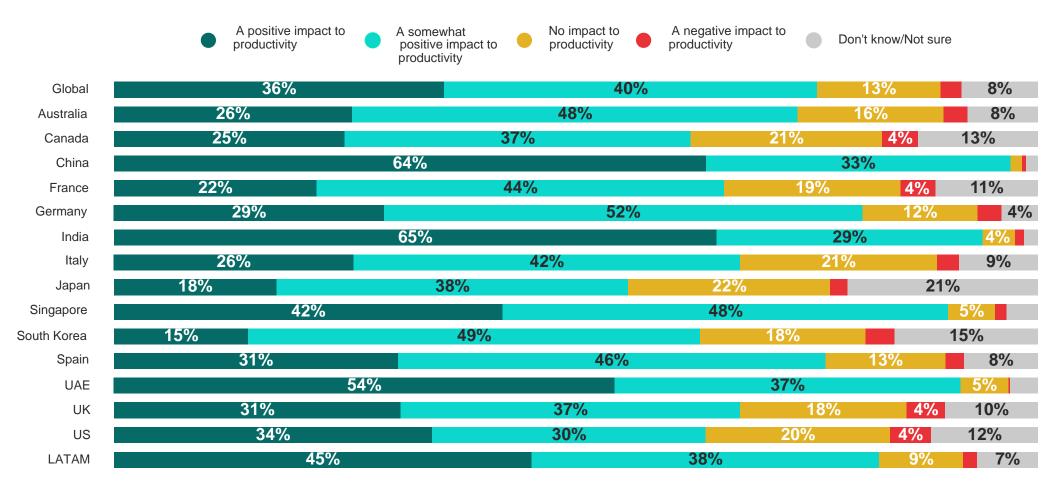
Improvements in IT or network performance is the top benefit of using AI and automation for IT, business and/or network processes according to IT Professionals (45%).

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	Australia	Canada	China	France	Germany	India	Italy	Japan	Singapore	South Korea	Spain	UAE	UK	US	LATAM
Improvements in IT or network performance	45%	40%	39%	45%	35%	48%	57%	34%	35%	46%	41%	38%	53%	47%	39%	50%
Employees are freed to focus on higher value tasks	43%	49%	41%	41%	42%	40%	54%	31%	42%	49%	36%	41%	43%	41%	41%	41%
Faster mean time to resolution	42%	40%	42%	38%	35%	37%	47%	32%	42%	43%	43%	41%	41%	32%	39%	52%
Mitigating labor and skills shortages in our IT department	35%	34%	28%	34%	26%	35%	45%	30%	38%	42%	35%	31%	45%	34%	30%	27%
Delivering and scaling new services more quickly	34%	31%	31%	31%	33%	34%	44%	26%	28%	39%	29%	31%	31%	27%	37%	38%
Acceleration of business processes/results	33%	31%	33%	30%	29%	37%	41%	26%	28%	29%	33%	32%	33%	20%	33%	40%
Real-time visibility of your applications	32%	31%	29%	32%	33%	31%	41%	29%	28%	41%	22%	30%	41%	24%	24%	33%
Reduction in infrastructure spend	32%	25%	25%	35%	27%	31%	33%	26%	42%	38%	34%	30%	34%	28%	27%	36%
Better experiences for our customers	29%	24%	25%	37%	24%	24%	45%	15%	20%	35%	28%	25%	38%	17%	22%	31%
Reduction of outages	28%	23%	26%	26%	37%	38%	26%	33%	25%	33%	18%	24%	24%	26%	27%	31%
Accelerated delivery of new applications and services	23%	21%	17%	25%	17%	22%	34%	13%	17%	21%	23%	21%	24%	15%	23%	28%
Accelerated recruiting and hiring	21%	17%	22%	23%	20%	21%	32%	17%	16%	20%	15%	23%	19%	24%	17%	22%
Reduction in data center emissions or carbon footprint	20%	20%	16%	22%	19%	17%	30%	12%	18%	27%	20%	19%	24%	19%	13%	17%
None of the above	1%	2%	1%	0%	1%	0%	0%	1%	1%	0%	2%	0%	0%	1%	1%	0%
We are not using AI for this purpose	1%	1%	2%	0%	1%	0%	0%	1%	0%	0%	1%	1%	0%	2%	2%	0%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%

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AI and automation investments have perceived positive impacts among a majority of IT Professionals (76%).

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

● A positive impact to productivity ● A somewhat positive impact to productivity ● No impact to productivity ● A negative impact to productivity ● Don't know/Not sure

	A positive impact	A somewhat positive	No impact	A negative	Don't know/Not sure
Global	36%	40%	13%		8%
Australia	26%	48%	16%		8%
Canada	25%	37%	21%	4%	13%
China	64%	33%			
France	22%	44%	19%	4%	11%
Germany	29%	52%	12%		4%
India	65%	29%	4%		
Italy	26%	42%	21%		9%
Japan	18%	38%	22%		21%
Singapore	42%	48%	5%		
South Korea	15%	49%	18%		15%
Spain	31%	46%	13%		8%
UAE	54%	37%	5%		
UK	31%	37%	18%	4%	10%
US	34%	30%	20%	4%	12%
LATAM	45%	38%	9%		7%