



**MORNING CONSULT**

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**THE GLOBAL SPRINT TOWARDS AI**

**Survey Results**

October 10-22, 2019

## Background

## Methodology



### **Representative sample of business decision-makers in 7 countries**

- 1003 in United States
- 1002 in China
- 2509 in European Union countries (UK, Italy, Spain, France, Germany)
- Conducted online through MC's proprietary network of online providers



### **Respondents represented a mix of small and large firms**

- 31% of respondents came from firms with more than 1,000 employees
- 34% of respondents came from firms with between 251 and 1,000 employees
- 16% came from firms with 51-250 employees
- 19% came from smaller businesses (50 employees or less)
- 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
- One-third 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 with close knowledge or authority in their firm's IT/AI practices

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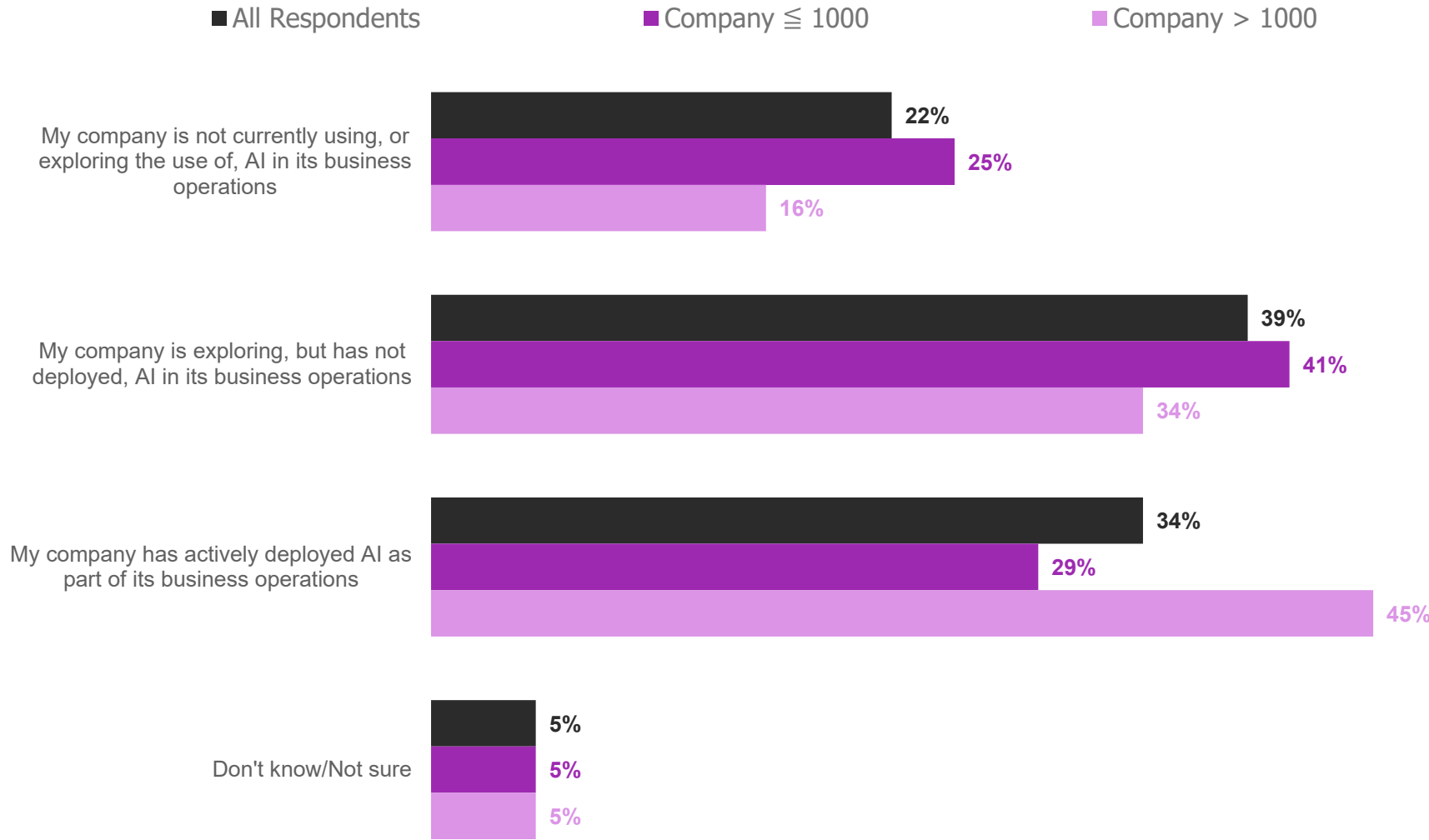
**AI and Cloud**



# Current and Planned Investment in AI

Large companies are much more likely to have actively deployed AI as part of their business operations compared to smaller companies.

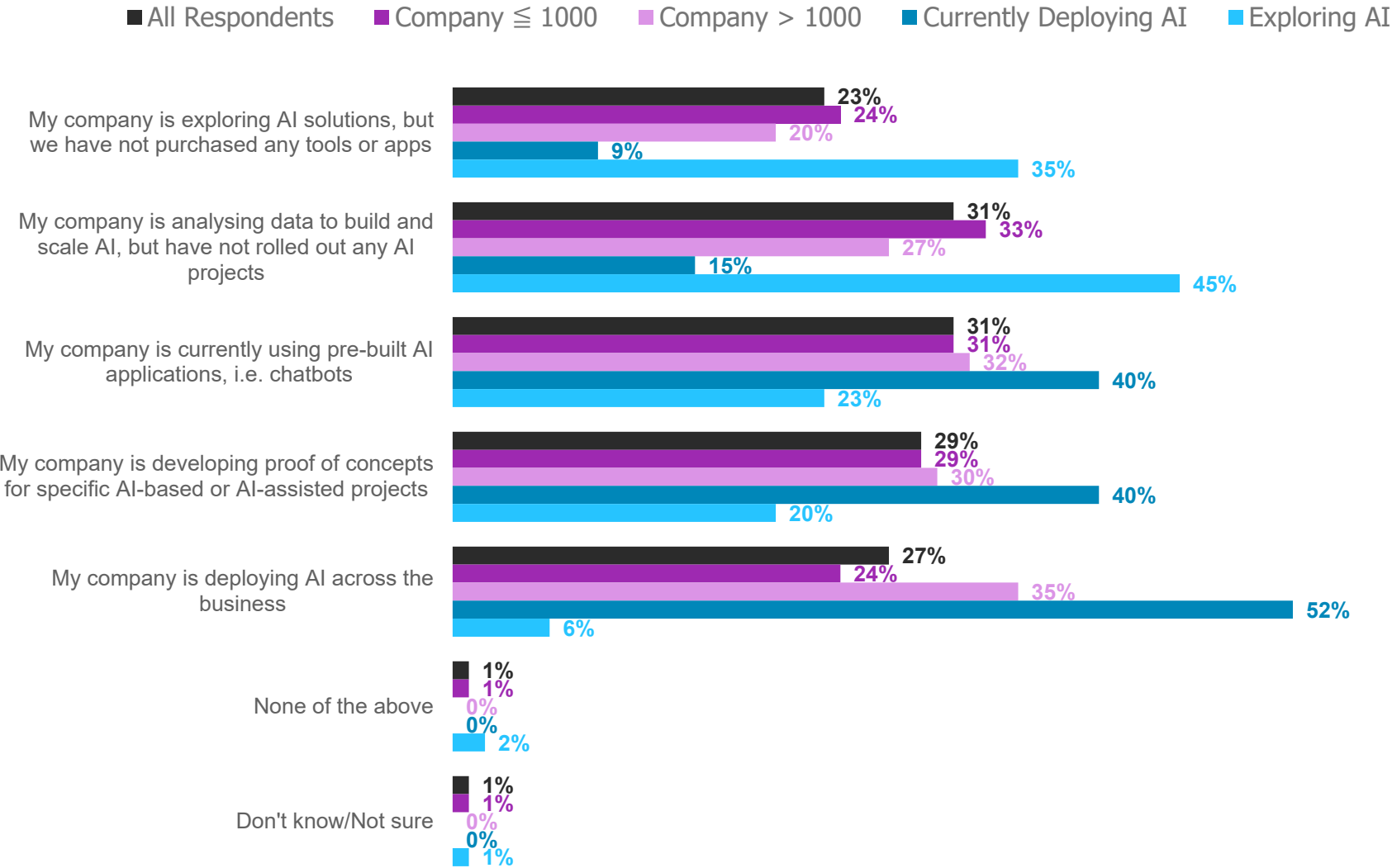
*Has your company adopted or explored using Artificial Intelligence (AI) as part of its business operations?*



# Current and Planned Investment in AI

Large companies are more likely to have deployed AI across the business, while smaller companies are more likely to have not yet rolled out any AI projects. Half of professionals whose companies have already begun deploying AI report that they are doing so across the business.

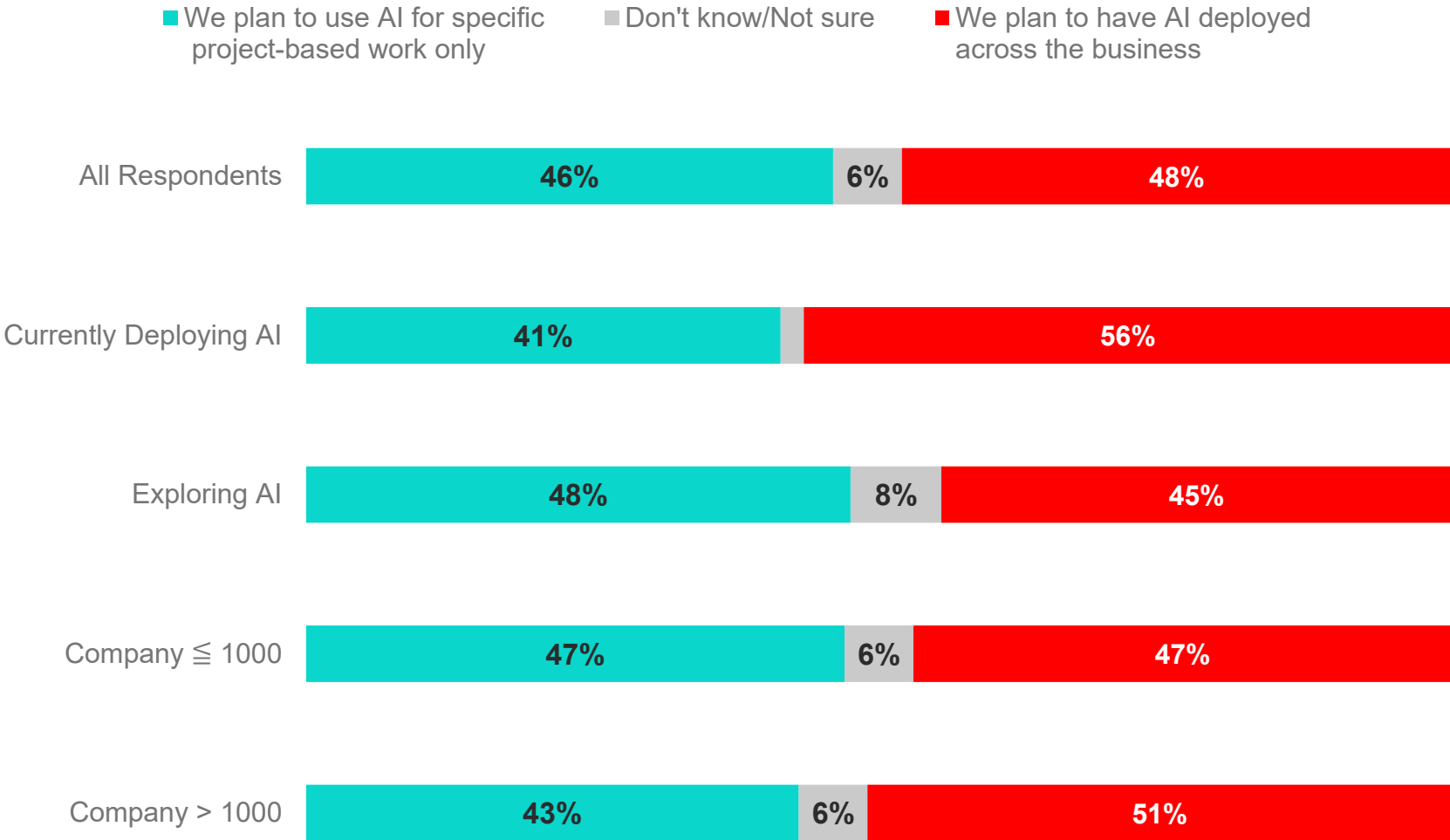
What steps has your company taken to explore or deploy AI in its business operations? Select all that apply.  
[Among companies currently exploring or deploying AI]



# Current and Planned Investment in AI

## Both companies that are exploring and currently deploying AI are split on how they intend to deploy it.

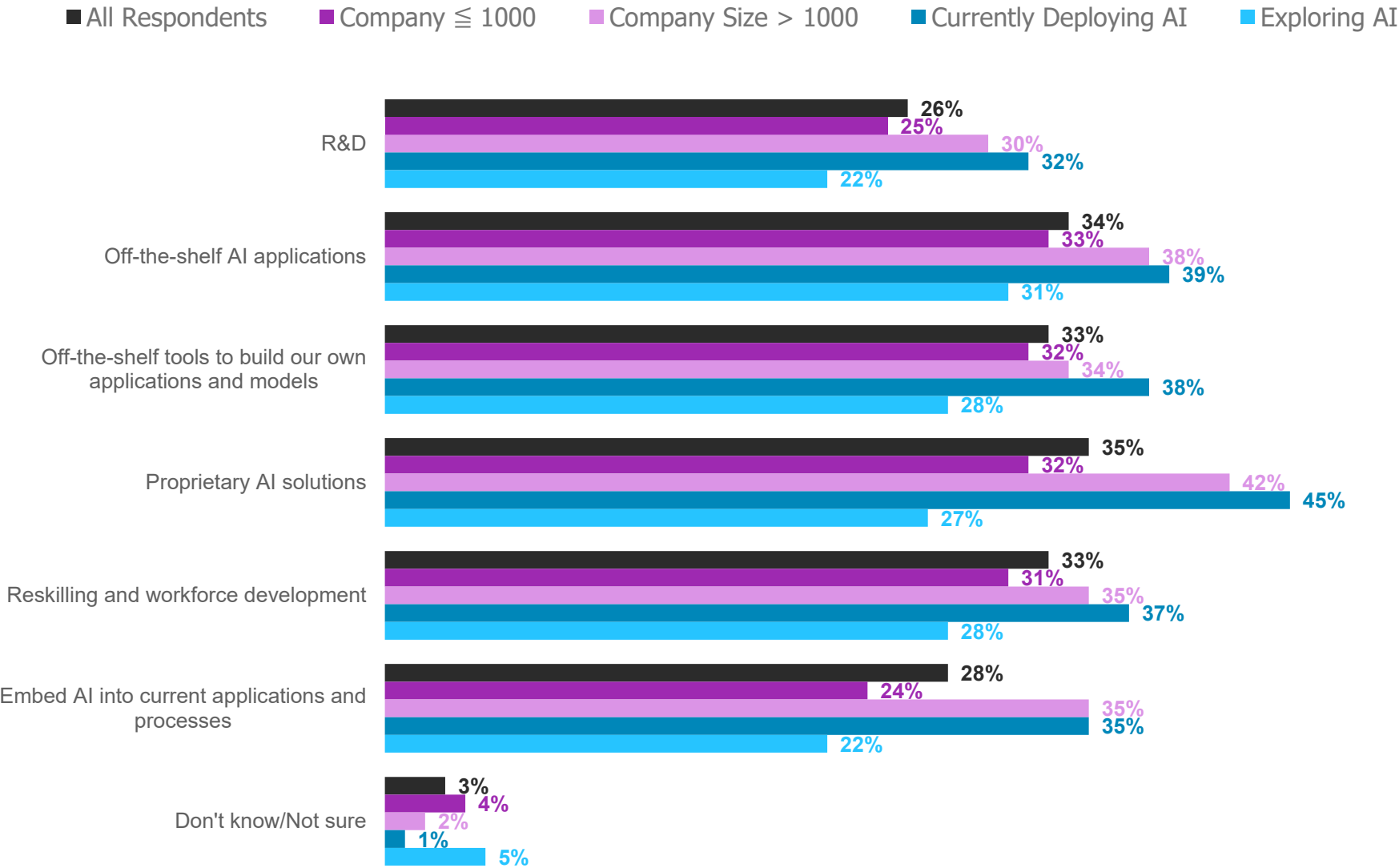
*Is your company interested in deploying AI broadly across the business, or just for specific applications? [Among companies currently exploring or deploying AI]*



# Current and Planned Investment in AI

Large companies are more likely to be investing in various types of AI adoption, particularly embedding AI into current applications and processes and proprietary AI solutions. Professionals whose companies are currently deploying AI are much more likely to report investment across the board, particularly in proprietary AI solutions.

How does your company plan to invest on AI adoption over the next 12-months?  
[Among companies currently exploring or deploying AI]



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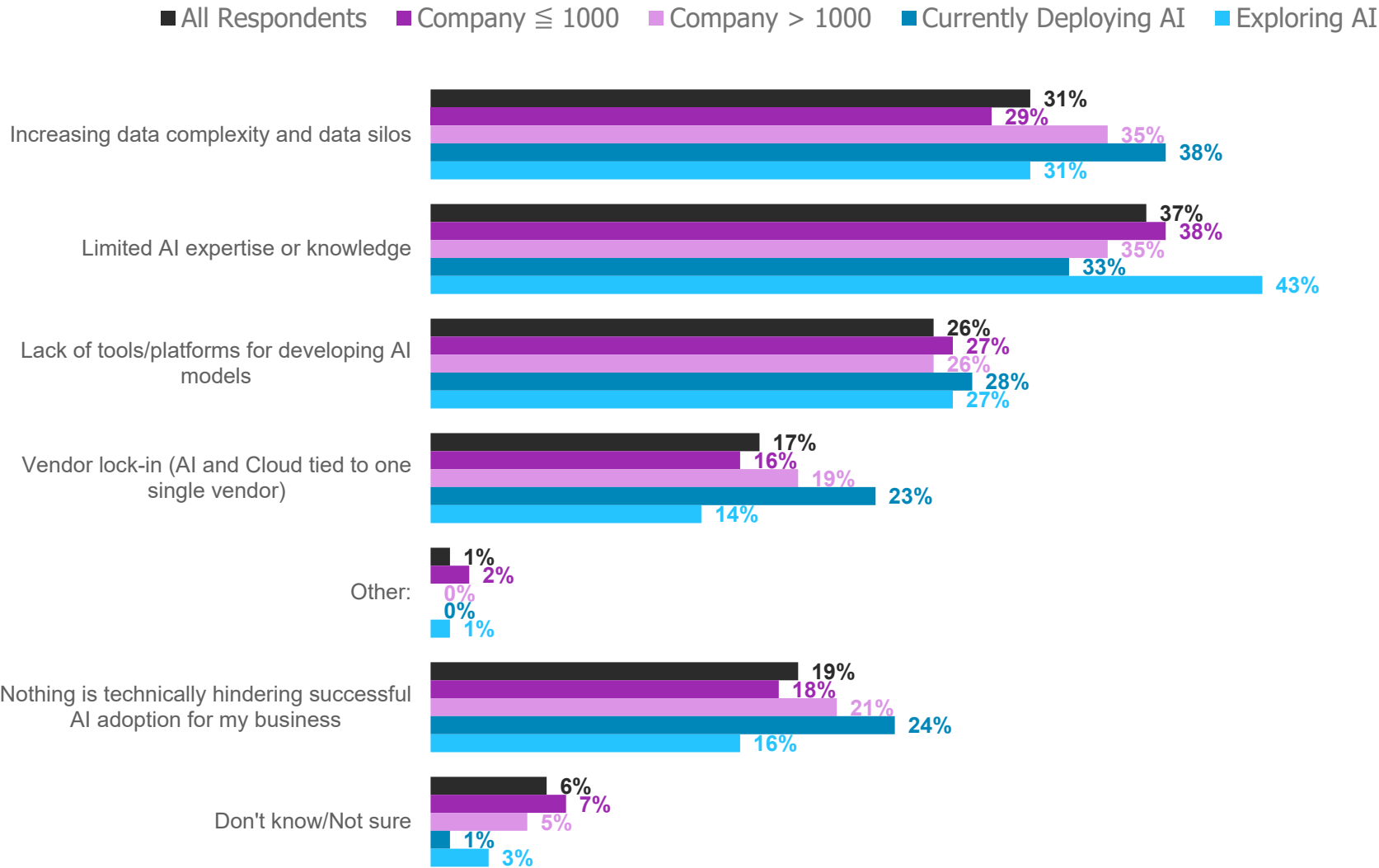
**AI and Cloud**



# Barriers to AI Adoption

Increasing data complexity and data silos is more likely to be a barrier for large companies than smaller companies. Limited AI experience is a significant barrier to AI adoption for companies which are still exploring AI, while increasing data complexity and vendor lock-in are larger issues for companies currently deploying AI.

What, if anything, is technically hindering successful AI adoption for your business? Select all that apply.



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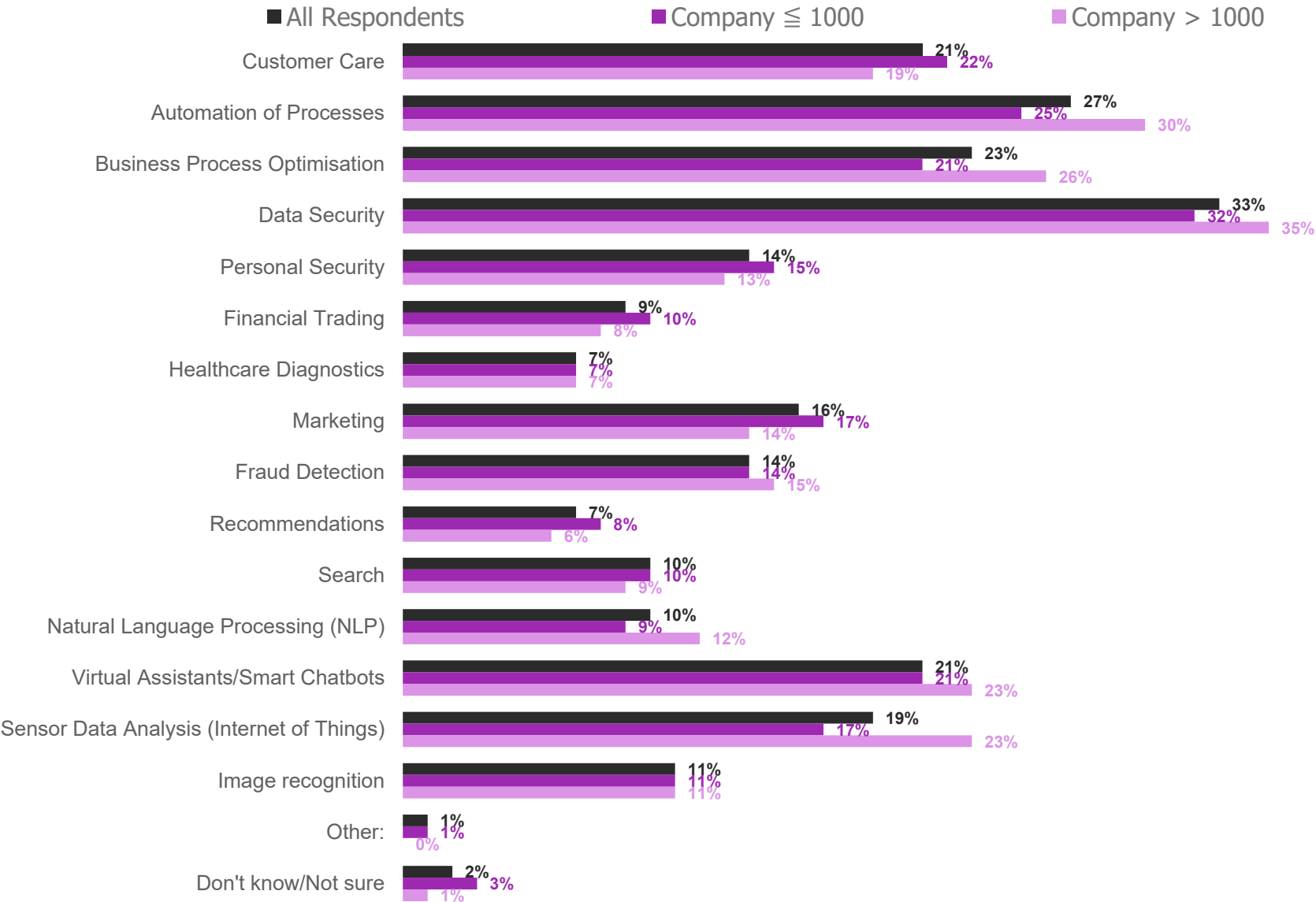


**AI and Cloud**

# Most Important Types of AI Deployment

Smaller companies are slightly more likely to use AI for customer care, personal security, and marketing, while larger companies are slightly more likely to use it for data security, sensor data analysis, and virtual assistants.

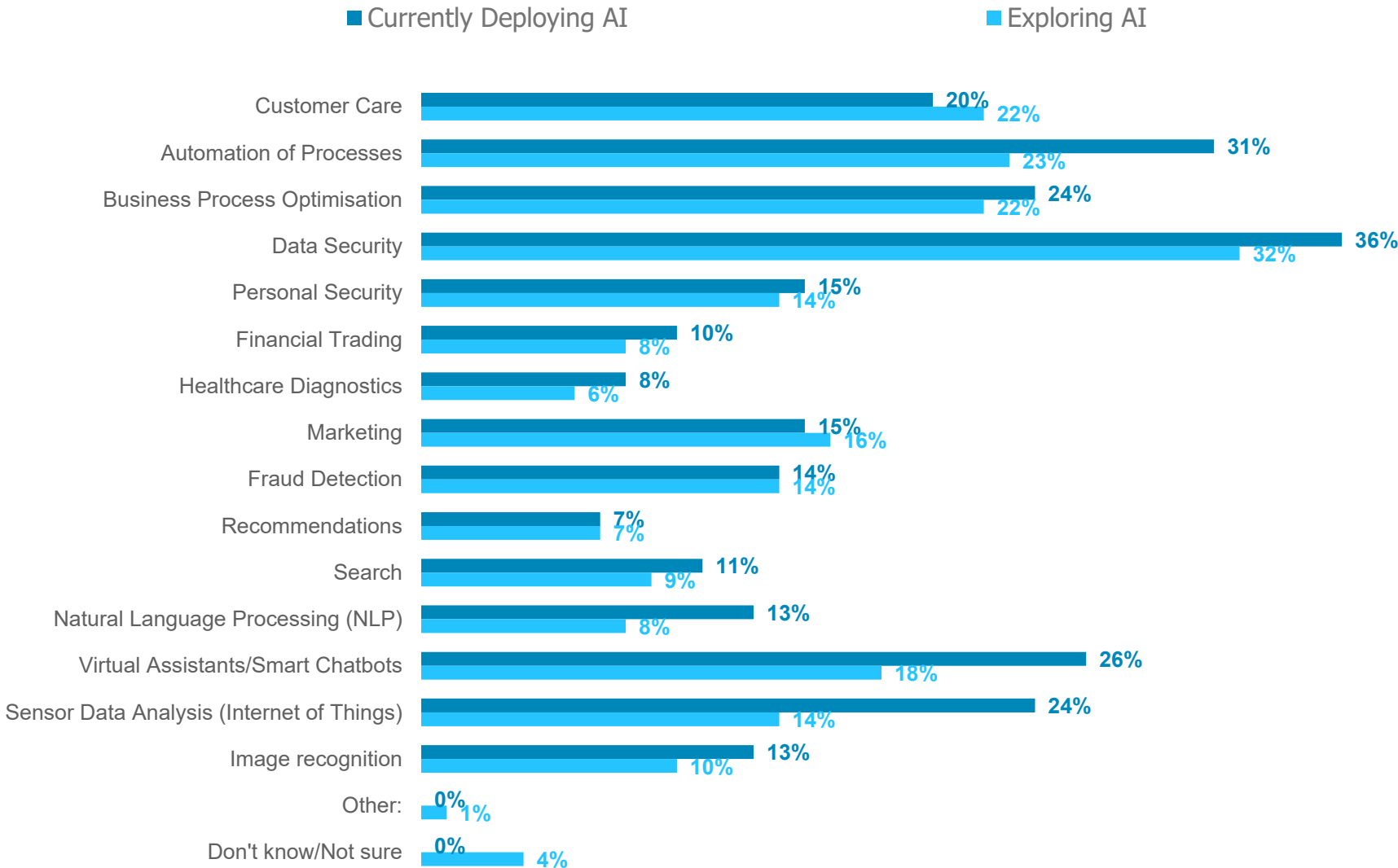
What are the most important ways your organization is using AI today? Select up to three. [Among companies currently exploring or deploying AI]



# Most Important Types of AI Deployment

Professionals at companies currently deploying AI report data security, automation of processes, and virtual assistants/chatbots as the most important ways their company is using AI.

What are the most important ways your organization is using AI today? Select up to three.



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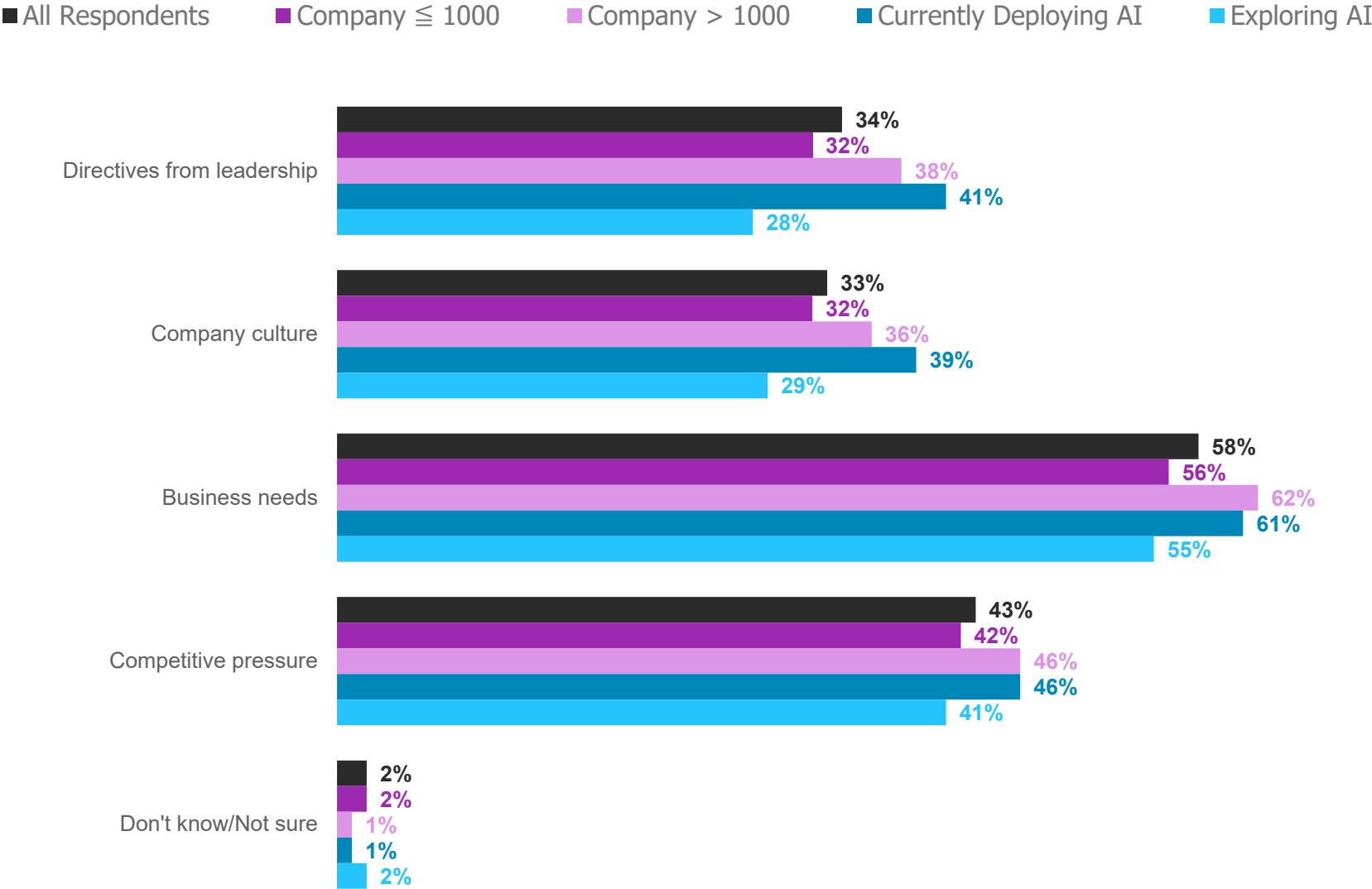


**AI and Cloud**

# AI Culture and Trust

Respondents from large companies are more likely to select a variety of factors as driving AI culture at their organization, in particular business needs. A majority of professionals at companies that are currently deploying AI and those exploring AI list business needs as a reason for AI adoption.

*What is helping drive AI adoption in your organization? Select all that apply.*  
**[Among companies currently exploring or deploying AI]**

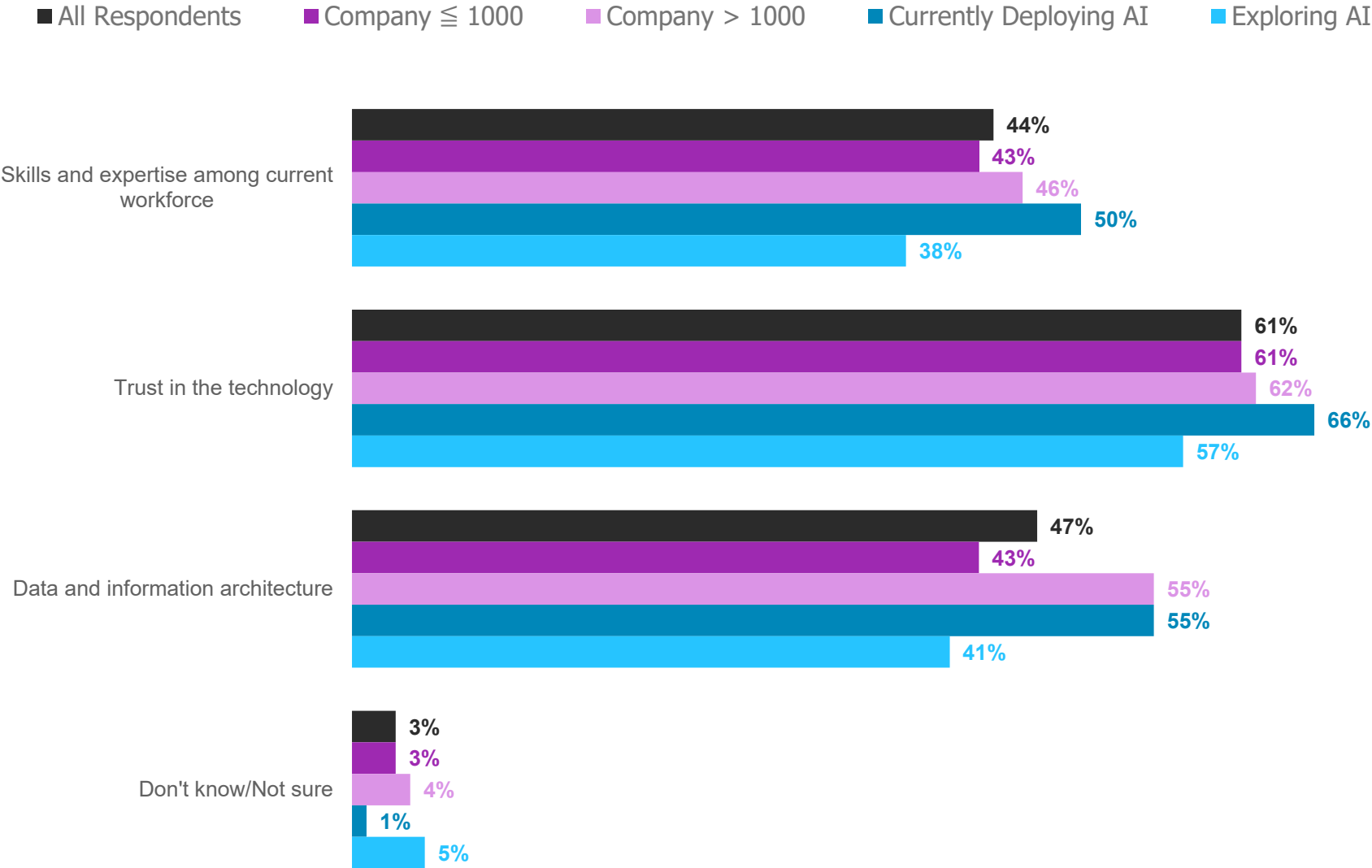




# AI Culture and Trust

Data and information architecture is more likely to contribute to AI culture at large companies than small companies. Trust in technology is a driving factor of AI culture at companies currently deploying AI.

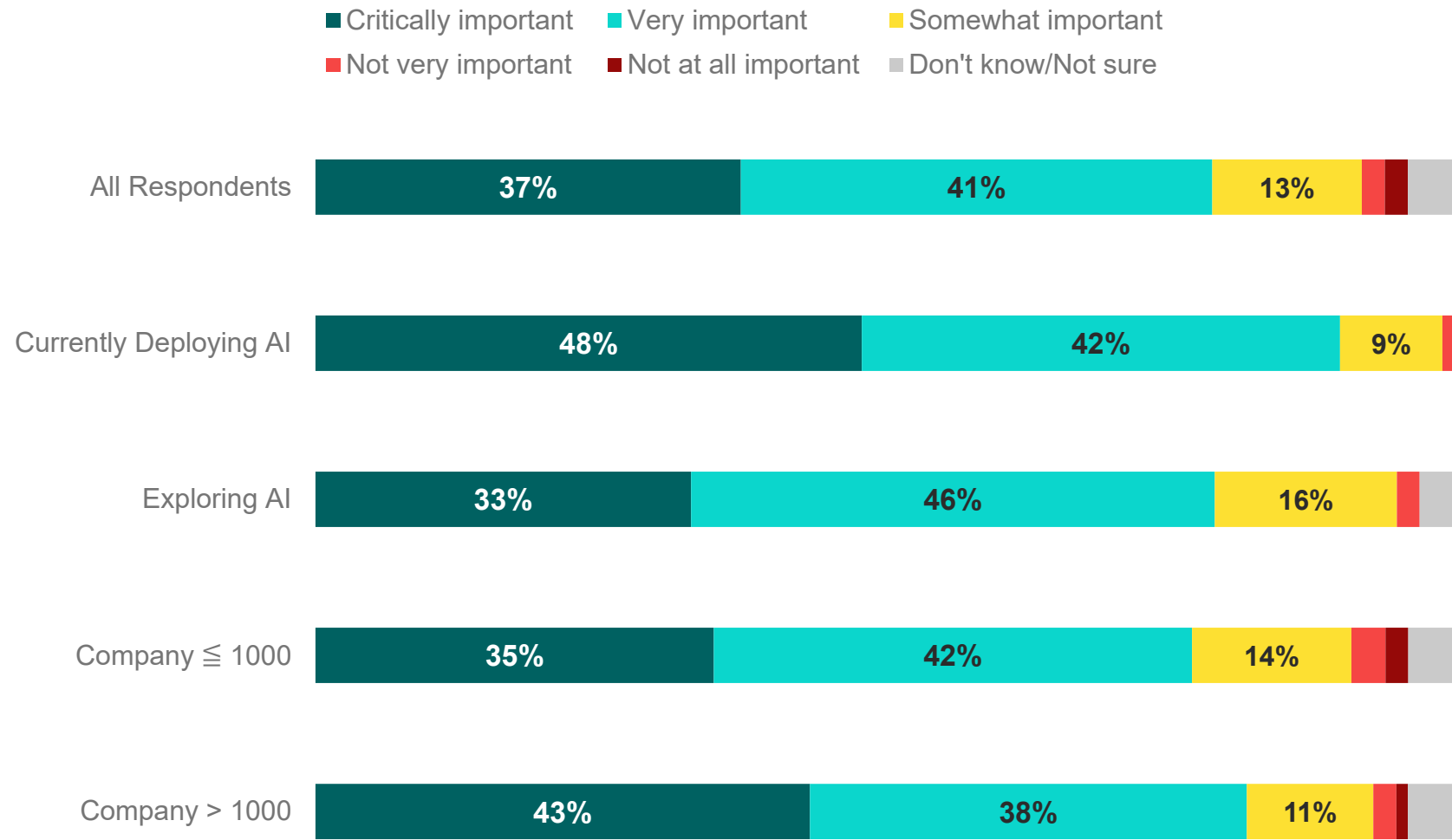
*What factors are contributing to your company's AI culture? [Among companies currently exploring or deploying AI]*



# AI Culture and Trust

## Being able to trust that the AI’s output is fair, safe, and reliable is most important to those who are currently deploying AI and for large companies.

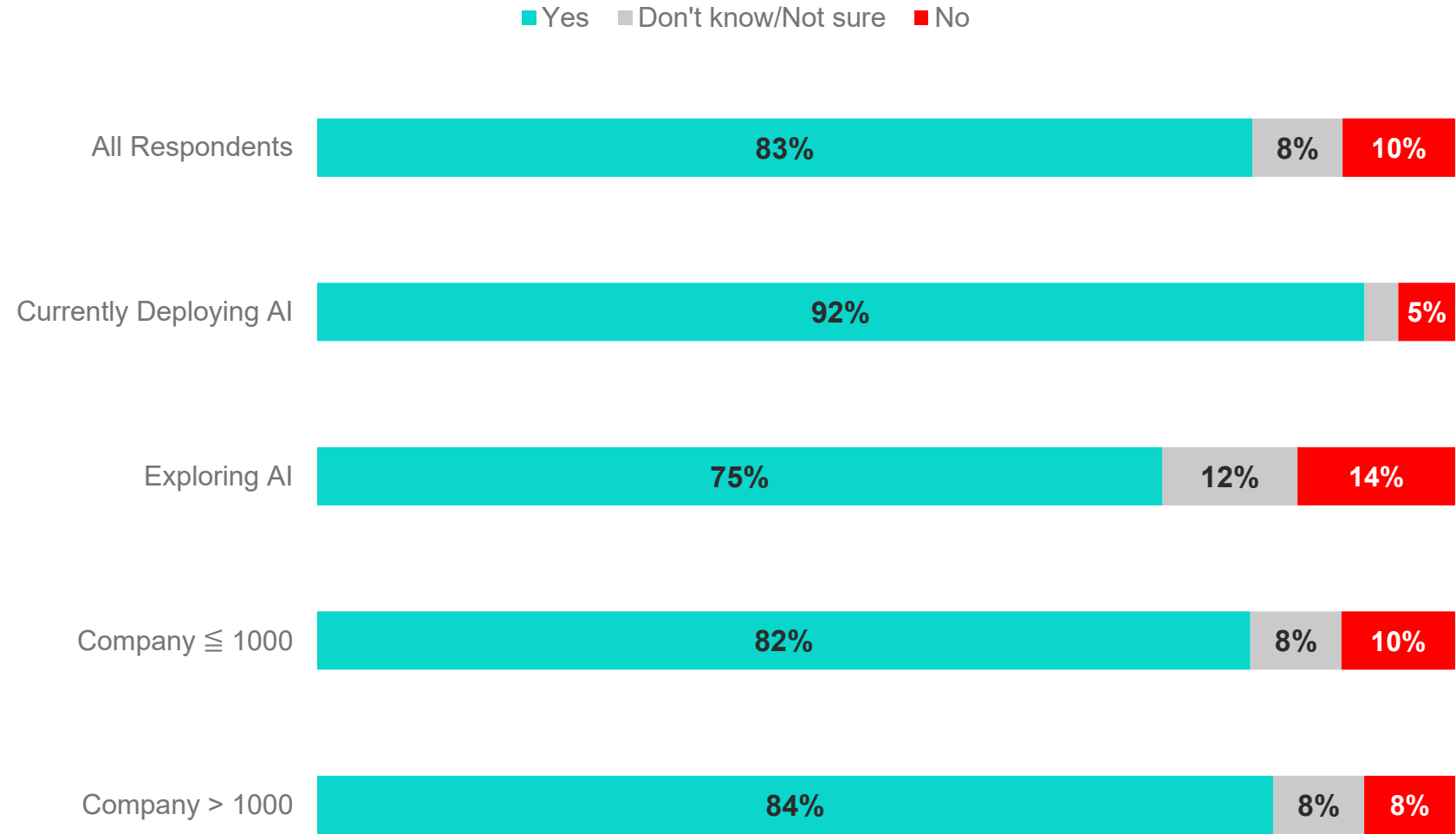
When it comes to AI, how important is it to your business that you can trust the AI's output is fair, safe and reliable? *[Among companies currently exploring or deploying AI]*



# AI Culture and Trust

Being able to explain how AI arrived at a decision is particularly important to those currently deploying AI over those currently exploring.

*Is being able to explain how your AI arrived at a decision important to your business?*



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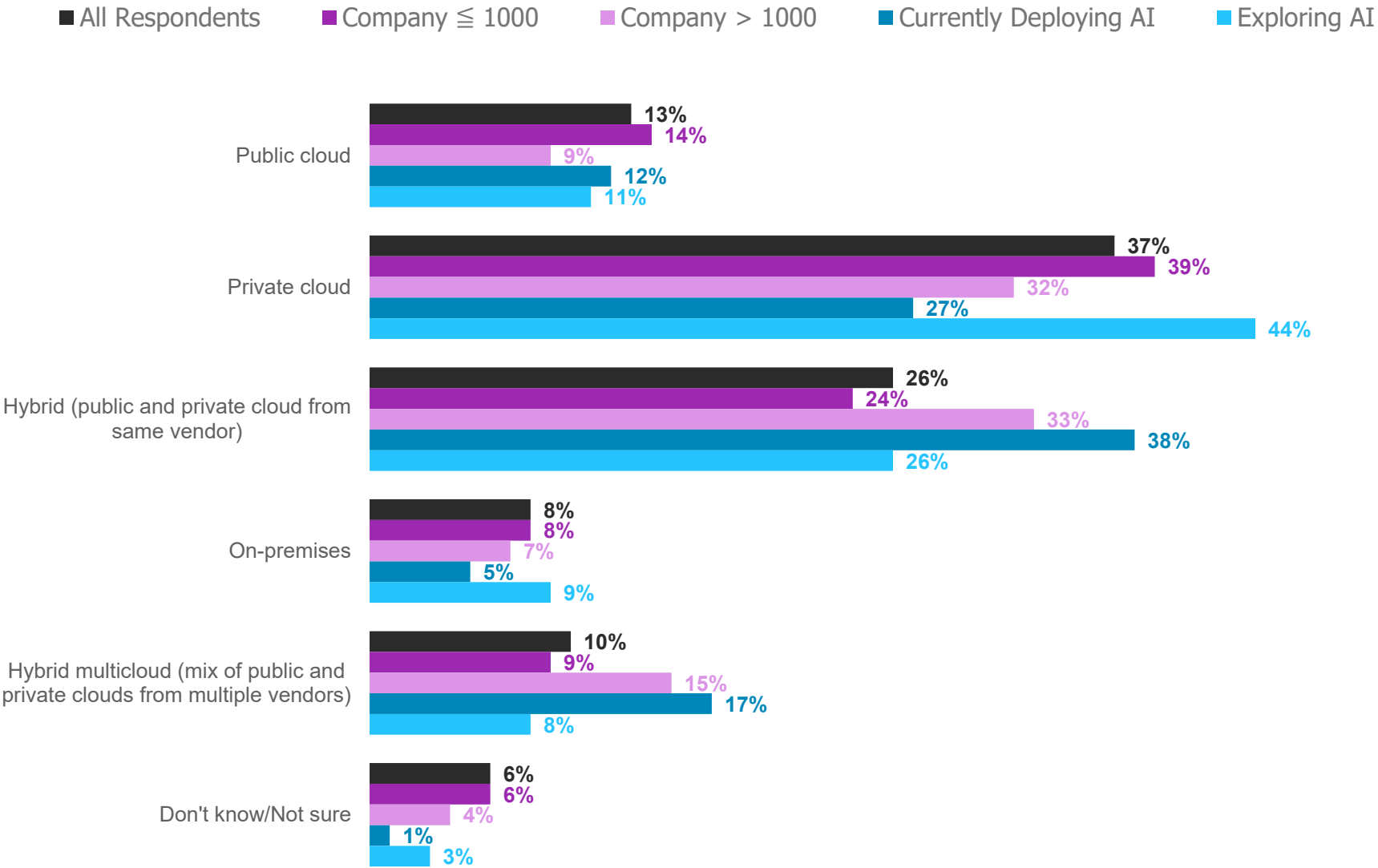


**AI and Cloud**

# AI and Cloud

Large companies are much more likely to use hybrid cloud or hybrid multicloud than smaller companies are. Companies currently exploring AI are much more likely to use a private cloud, while companies currently deploying are more likely to use a hybrid cloud.

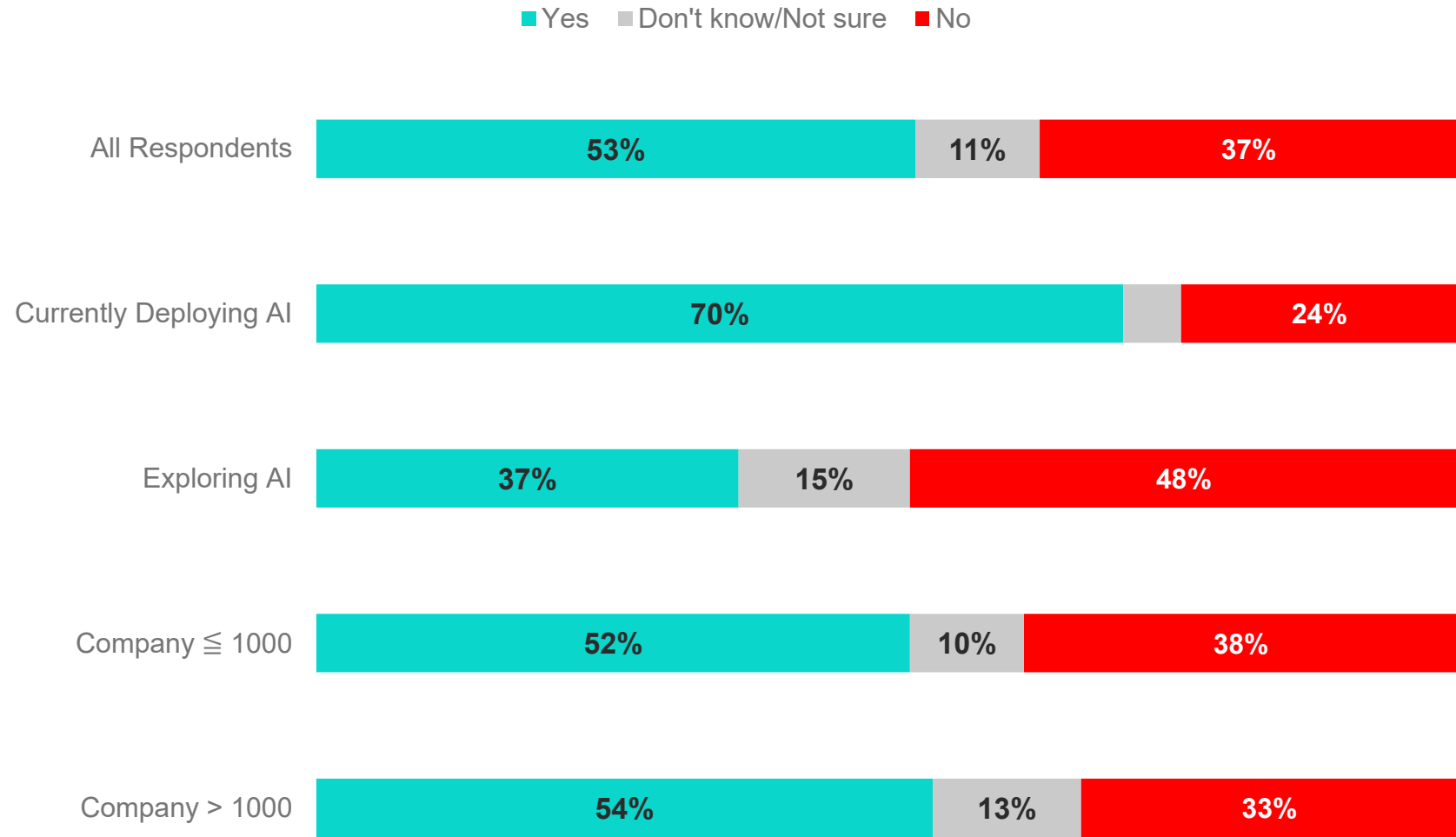
*What is your company's current data/cloud environment?*



# AI and Cloud

Companies currently deploying AI are more likely than those exploring to be required to use AI from their cloud provider by a margin of 33 points.

*Is your company required to use AI from your cloud provider?*





# AI and Cloud

Half of those working for companies which are exploring AI report that non-technical staff are not working with AI at their company, compared to over two-thirds of those at companies currently deploying AI who say the opposite.

*Are non-technical staff working with AI at your company?*

