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IBM GLOBAL AI ADOPTION INDEX – ENTERPRISE REPORT

NOVEMBER 8 – 23, 2023

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REPRESENTATIVE SAMPLE OF IT PROFESSIONALS IN MARKET

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

COMPANY SIZE BREAKDOWN

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

RESPONDENTS REPRESENTED A MIX OF SENIORITY

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

Key Findings

1. **AI adoption and exploration, covering both general AI and generative AI, continues to be a substantial focus for enterprises globally one year after the release of GPT-3.** Many of those large companies already exploring or deploying AI have accelerated their roll-out of AI in the past two years, with 'Research and Development,' 'Workforce Upskilling,' and 'Building Proprietary AI Solutions' emerging as top investment priorities. In the dynamic landscape of generative AI, enterprises tend to utilize in-house technology over open-source technology.

2. **As enterprises enter the AI landscape, many have already established some form of an AI strategy.** This adoption is fueled by factors such as increased accessibility, cost-cutting through automation, and growing AI integration in business apps. Globally, Enterprise IT Professionals highlight accessible tools, %), the increased prevalence of AI related skillsets, and AI-tailored solutions as key industry changes. However, challenges like limited knowledge, too much data complexity, and ethical concerns hinder adoption. In the context of generative AI, additional obstacles emerge, including data privacy and trust/transparency concerns.

3. **AI is contributing to multiple facets of organizational operations at enterprises, with IT process automation and security and threat detection being the most popular applications.** IT Professionals are at the forefront of AI usage at their enterprises and note the importance of being able to build and run AI projects wherever their data resides. Confidence in these capabilities is high, as most IT Professionals are confident that their enterprise has the right tools to find data across the business.

4. **Trustworthy and responsible AI practices are of utmost importance to both consumers and enterprises at various stages of AI implementation**. In fact, most large organizations already exploring or deploying AI are actively taking steps like safeguarding data privacy through the entire lifecycle to ensure that. Insufficient expertise for reliable AI management and development and lack of an AI strategy are among the biggest barriers enterprises face as they strive to develop trustworthy AI.

5. **AI has a predominantly positive influence on the workforce.** Numerous enterprises are investing in AI training, and IT Professionals note employee enthusiasm for new AI and automation tools. Additionally, AI plays a crucial role in addressing labor and skills shortages by equipping large companies with the tools to streamline tasks and automate self-service interactions.

Methodology: This poll was conducted from Nov. 8 – 23, 2023 among a sample of 2,342 IT Professionals at enterprises (organizations with > 1,000 employees) in Australia, Canada, China, France, Germany, India, Italy, Japan, Singapore, South Korea, Spain, UAE, UK, US and LATAM (Brazil, Mexico, Peru, Argentina, Chile, Colombia). Global results have a margin of error of +/- 2 percentage points at a 95% confidence level.

AGENDA

AI ADOPTION & INVESTMENTS

DRIVERS & BARRIERS OF AI

CURRENT USES OF AI

AI ETHICS AND RESPONSIBILITY

AI'S IMPACT ON EMPLOYEES

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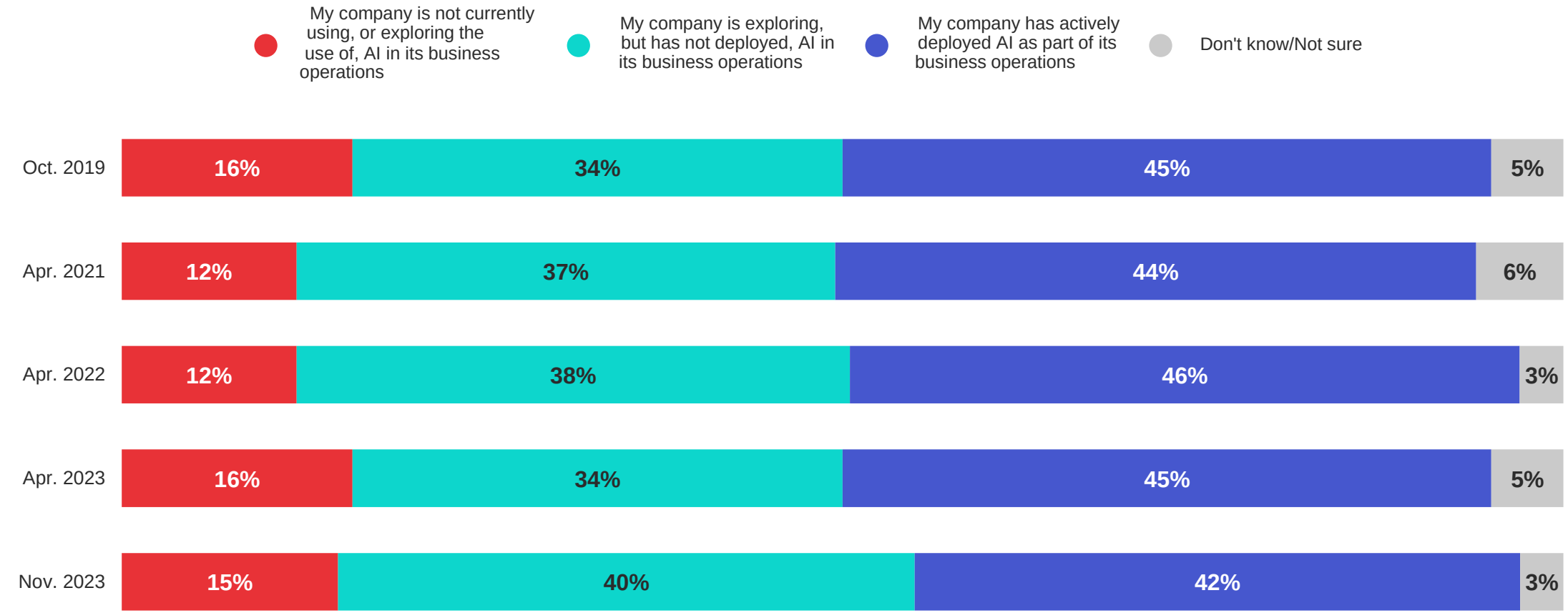
Over the past four years, AI adoption at enterprises has remained steady, with 42% of IT Professionals reporting AI deploying and an additional 40% reporting active exploration in November 2023.

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



Base IT Professionals at Enterprises (organizations > 1,000 employees): October 2019 = 1,358n, April 2021 = 1,550n, April 2022 = 2,362n, April 2023 = 2,247n, November 2023 = 2,342n

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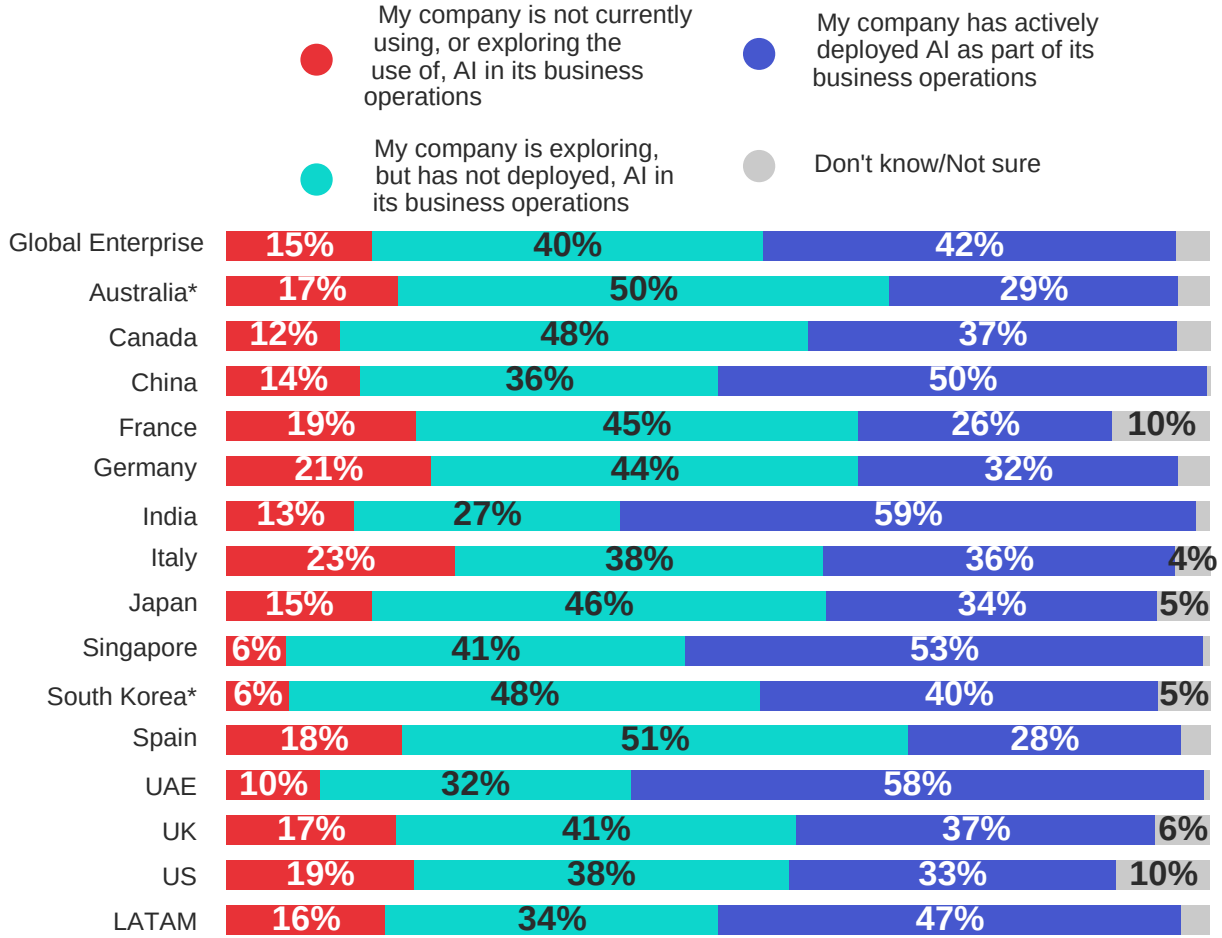
Although there is a similar global AI Adoption trend from April 2023, there are some country specific outliers worth noting.

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



Increases in AI Adoption

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

Decreases in AI Adoption

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

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

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

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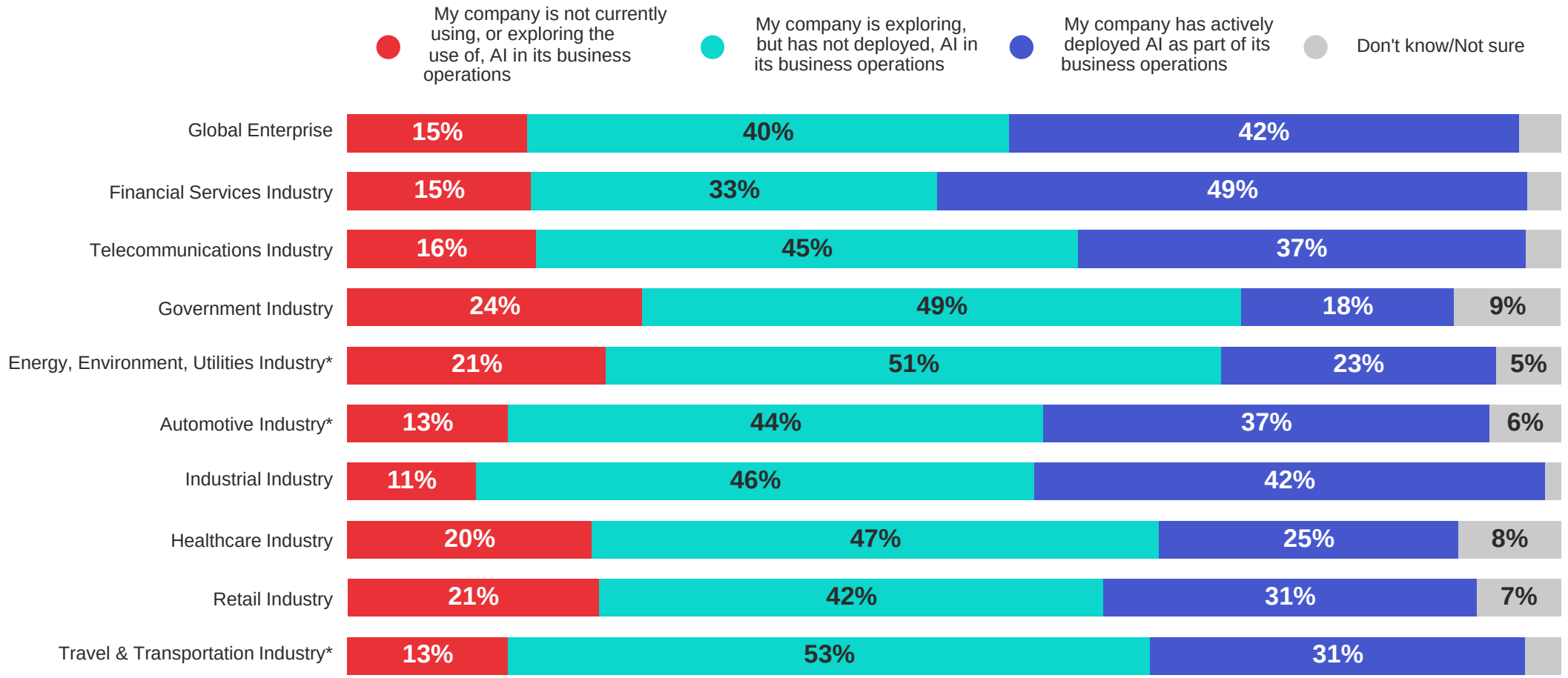
Enterprises within the financial services are most likely to be using AI, with nearly half of IT Professionals in that industry reporting their enterprise has actively deployed AI.

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



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

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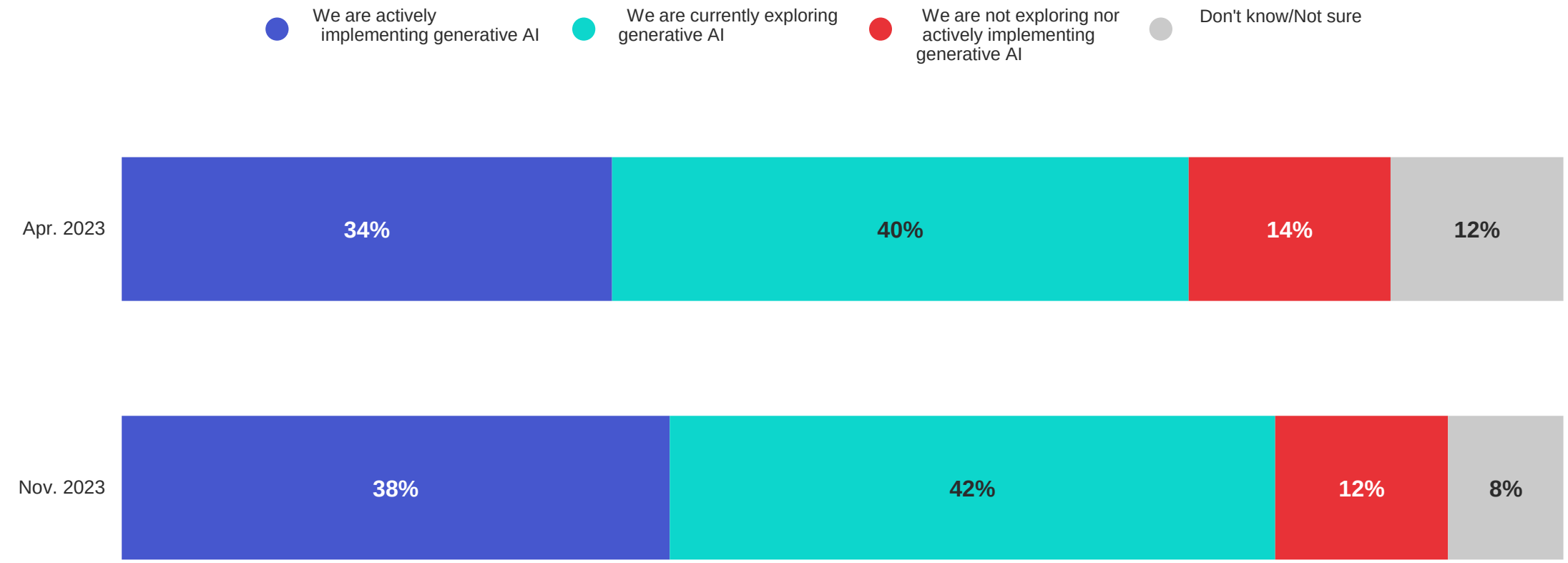
About 2-in-5 IT Professionals indicate that their enterprise is implementing generative AI (38%), and another 42% are currently exploring generative AI (42%).

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



Base IT Professionals at Enterprises (organizations > 1,000 employees): April 2023 = 2,247n, November 2023 = 2,342n

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

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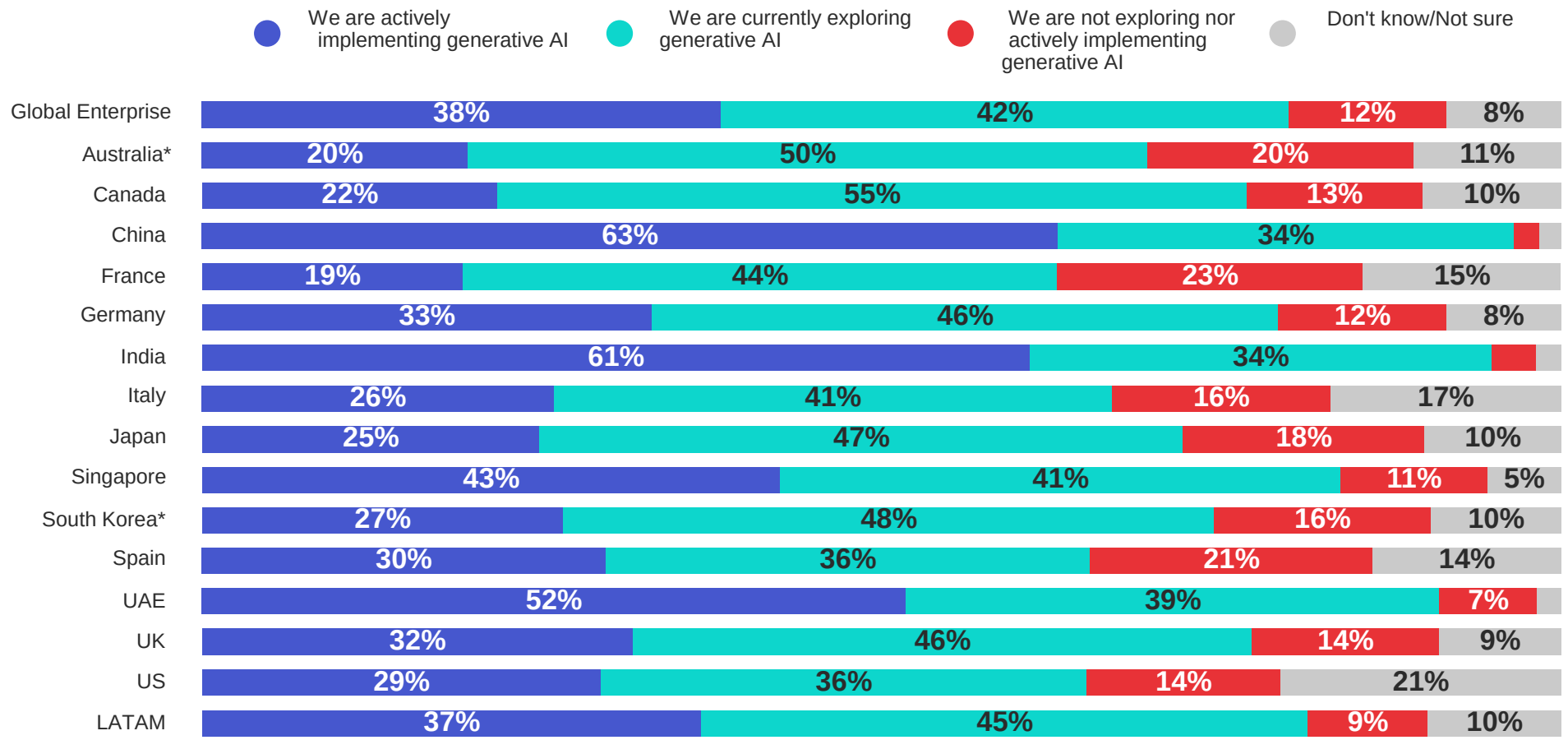

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*Sample size is between 50 and 99

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

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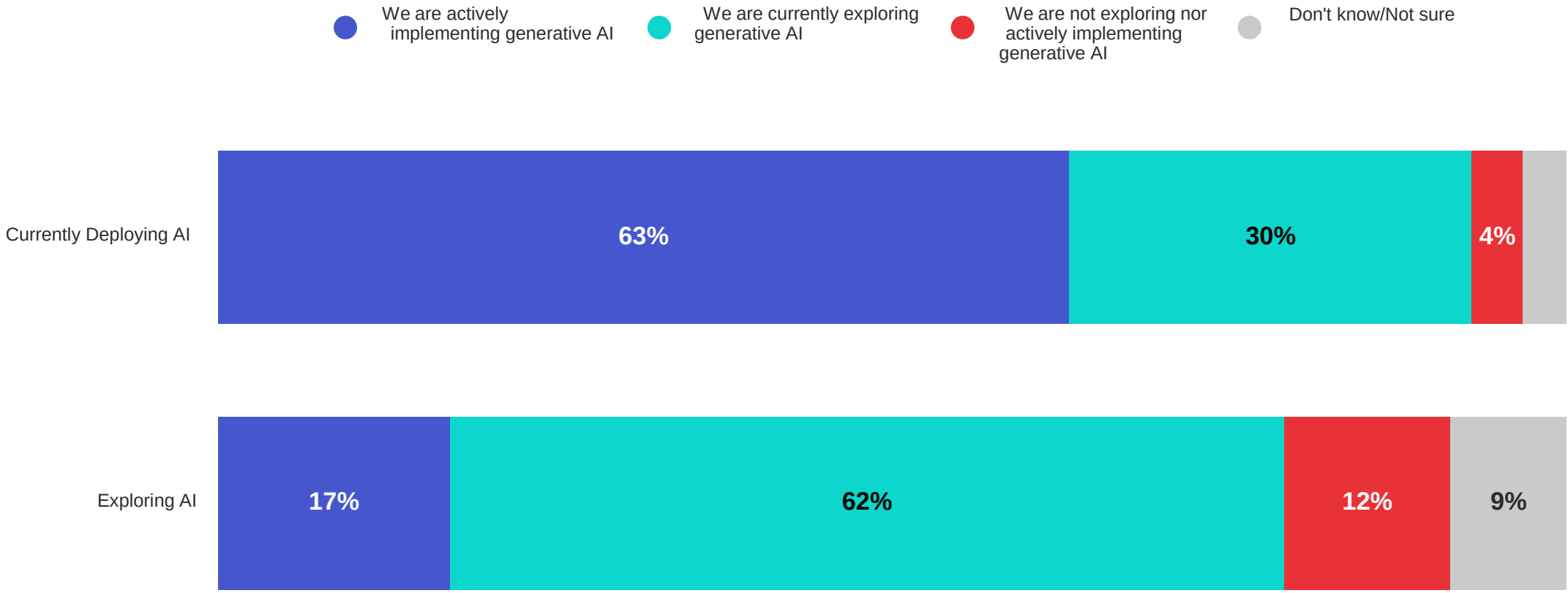

Base IT Professionals at Enterprises (organizations > 1,000 employees): Currently Deploying AI = 984n, Exploring AI = 930n

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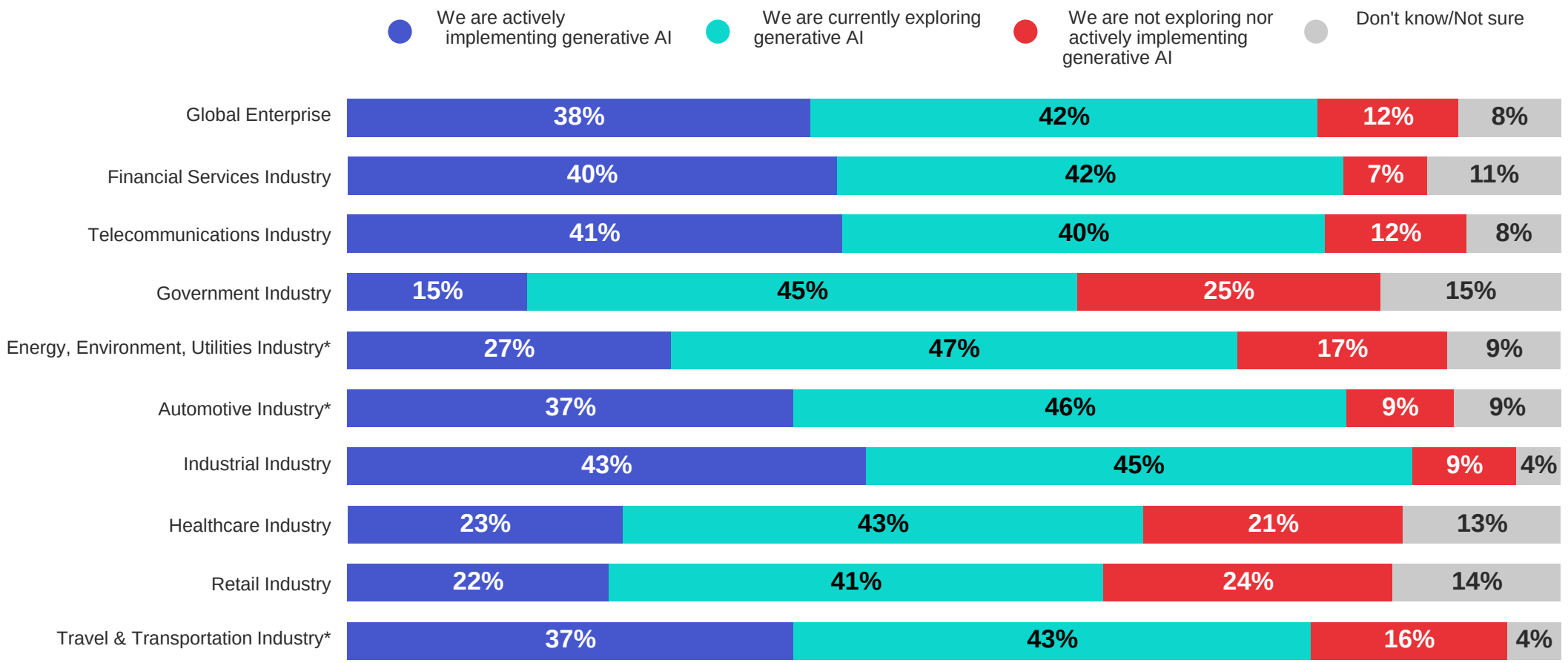
4-in-10 or more of IT Professionals within the financial services, telecommunications, and industrial industries indicate that their enterprise is implementing generative AI.

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



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

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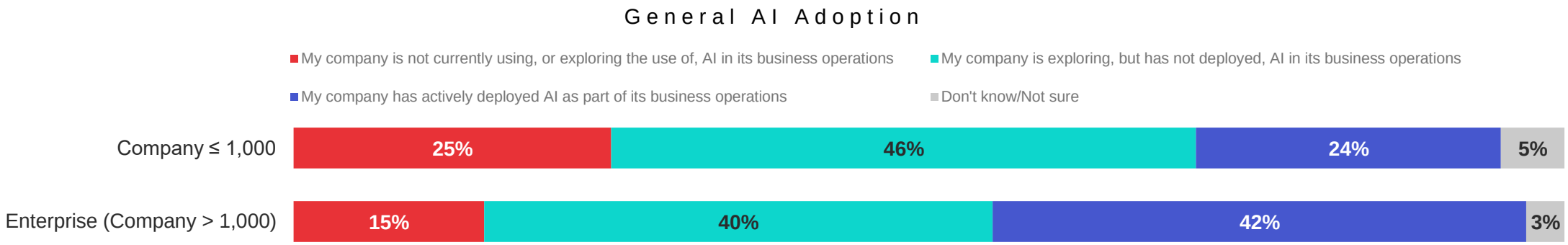
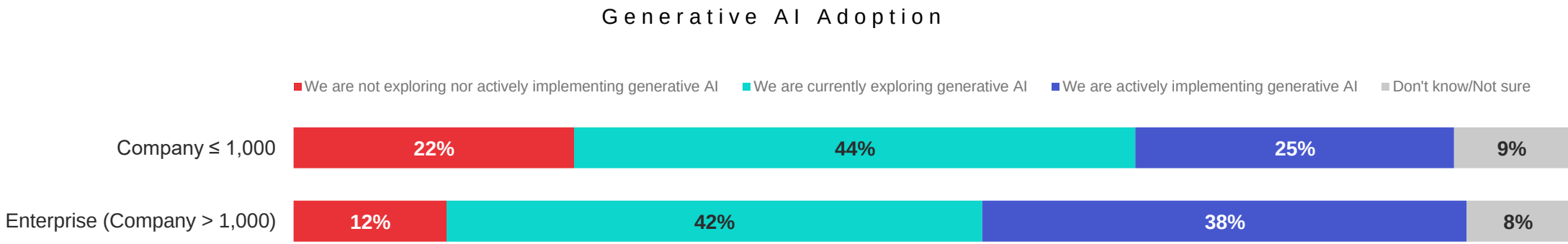
Companies with 1,000 or fewer employees are less likely than enterprises to be adopting general AI and generative AI.

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





Base IT Professionals: Enterprises (organizations > 1,000 employees) = 2,342n, Company ≤ 1,000 = 6,242n

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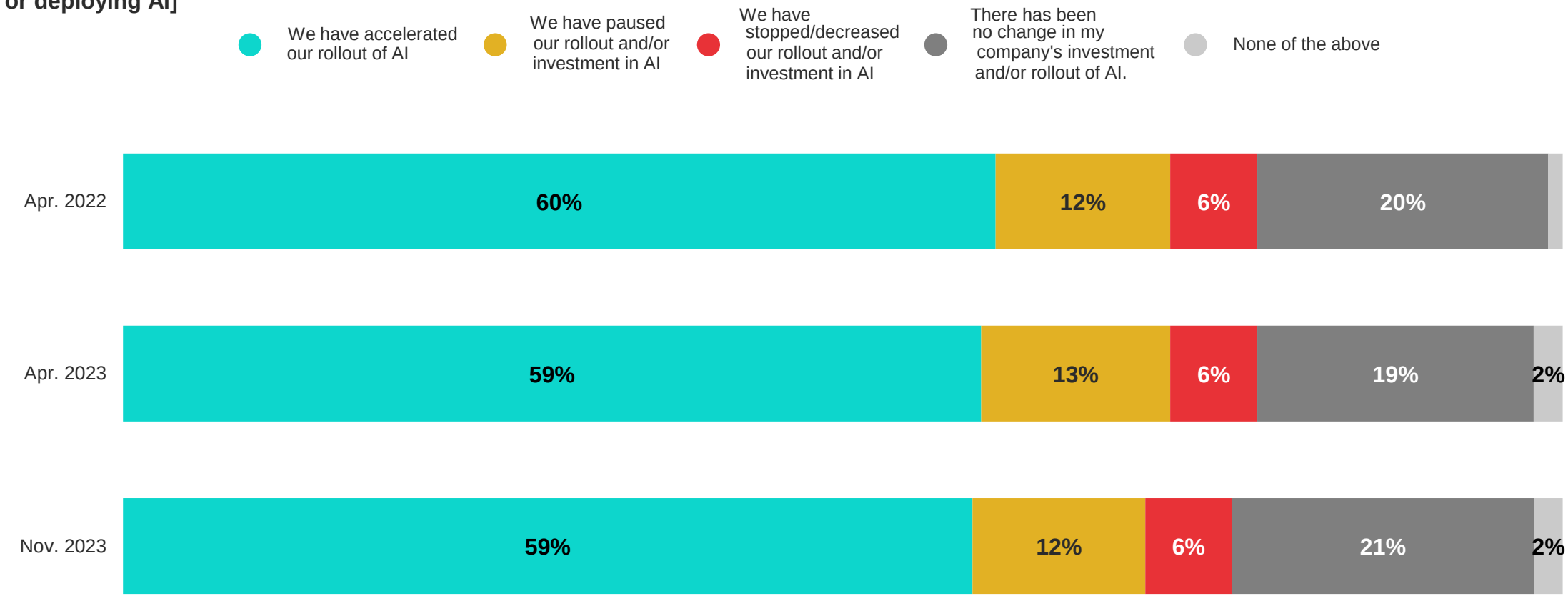
Investment in AI has remained relatively stable since April 2022.

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]**



Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/deploying AI: April 2022 = 2,005n, April 2023 = 1,767n, November 2023 = 1,914n

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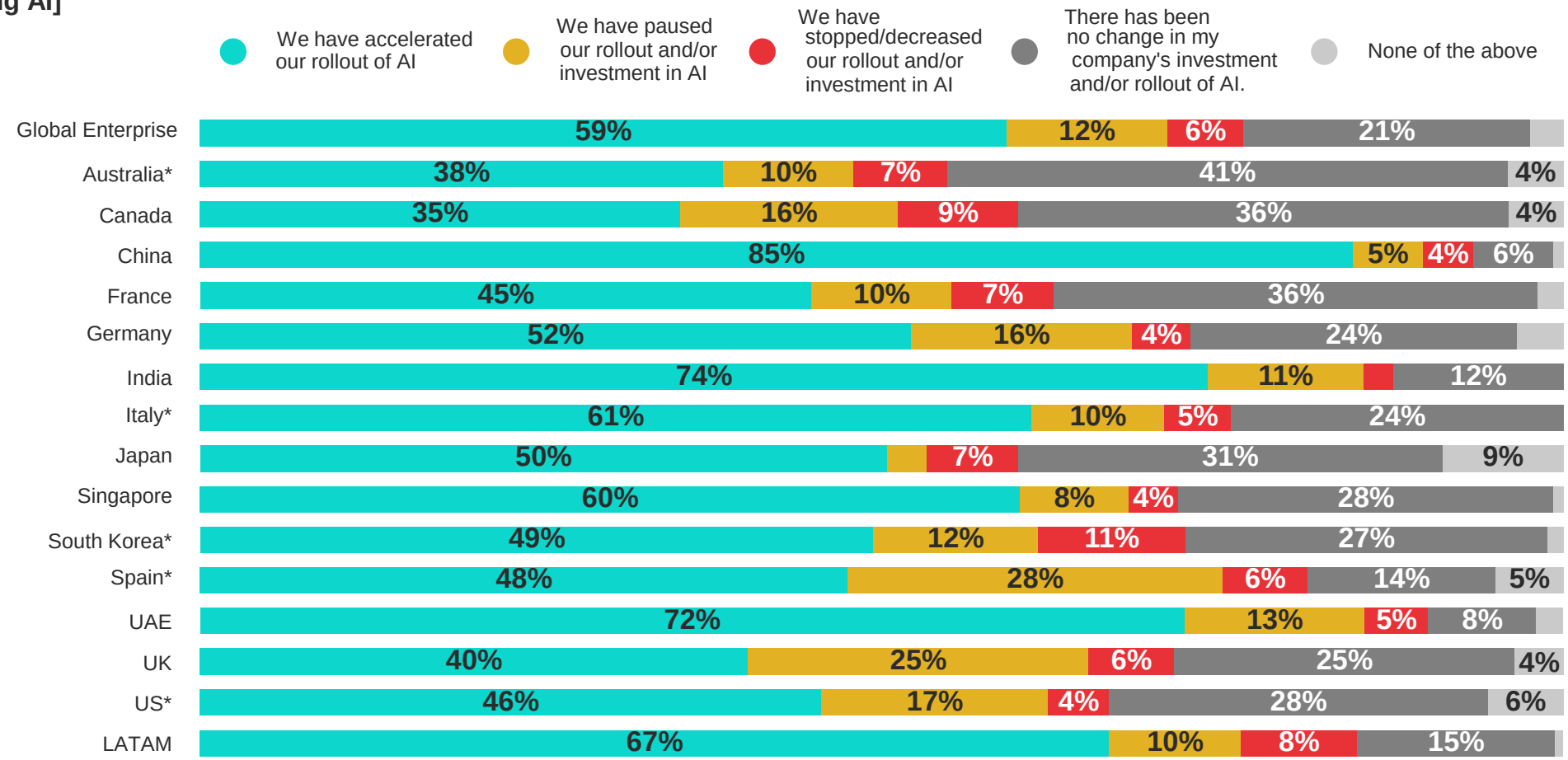
59% of IT Professionals at enterprises deploying or exploring AI indicate that their organization has accelerated the AI rollout in the past 24 months, and only around 1-in-5 (21%) say that their investment has remained unchanged.

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



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

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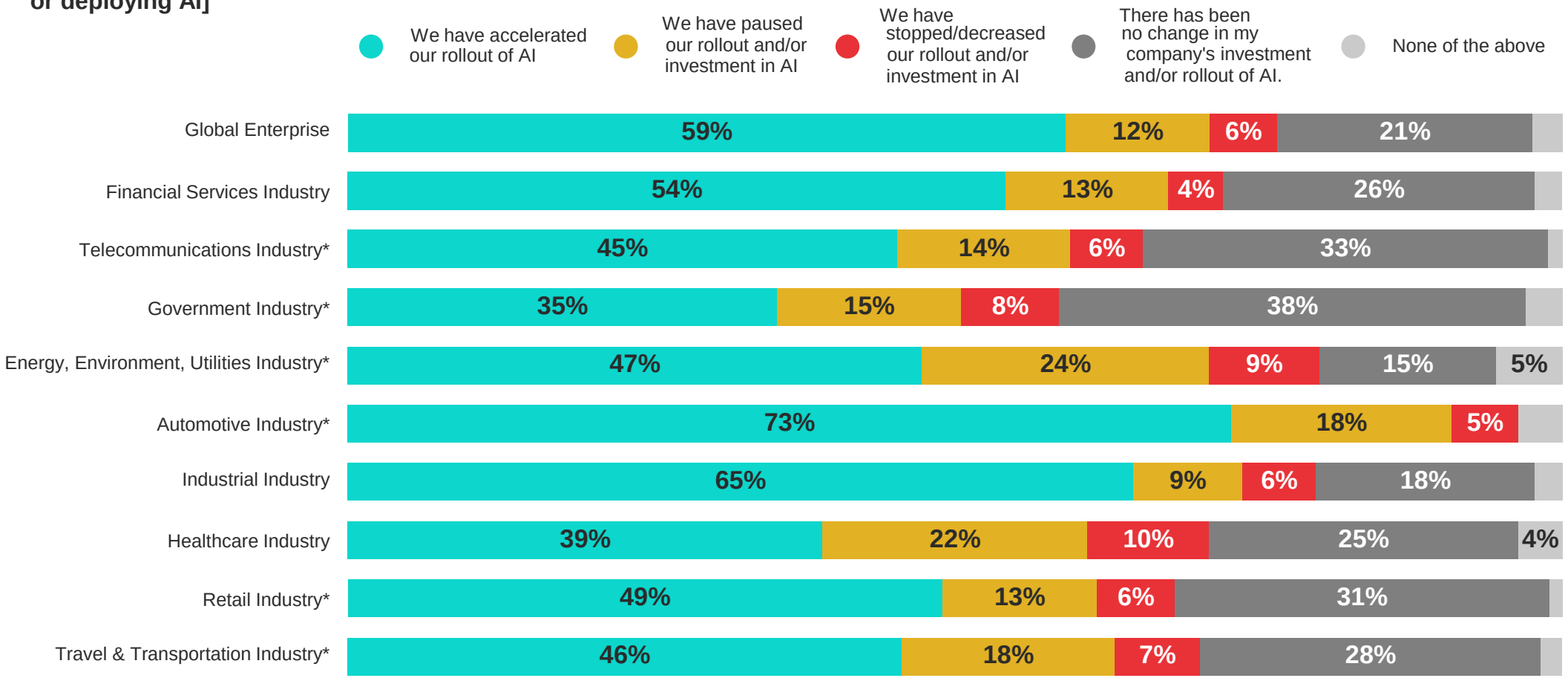
IT Professionals in the automotive and industrial industries are most likely to report their enterprise has accelerated AI investments in the past two years.

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



Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/deploying AI: Global Enterprise = 1,914n, Financial Services = 179n, Telecommunications = 84n, Government = 99n, Energy = 55n, Automotive = 55n, Industrial = 266n, Healthcare = 110n, Retail = 94n, Travel = 57n
*Sample size is between 50 and 99; Note: Media & Entertainment, Chemicals/Oil/Gas, and Aerospace & Defense Industry samples sizes are too low to show

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

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

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

Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/deploying AI: Global Enterprise = 1,914n, Australia = 73n, Canada = 125n, China = 272n, France = 107n, Germany = 117n, India = 184n, Italy = 82n, Japan = 135n, Singapore = 138n, South Korea = 83n, Spain = 80n, UAE = 151n, UK = 112n, US = 90n, LATAM = 165n
*Sample size is between 50 and 99
Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

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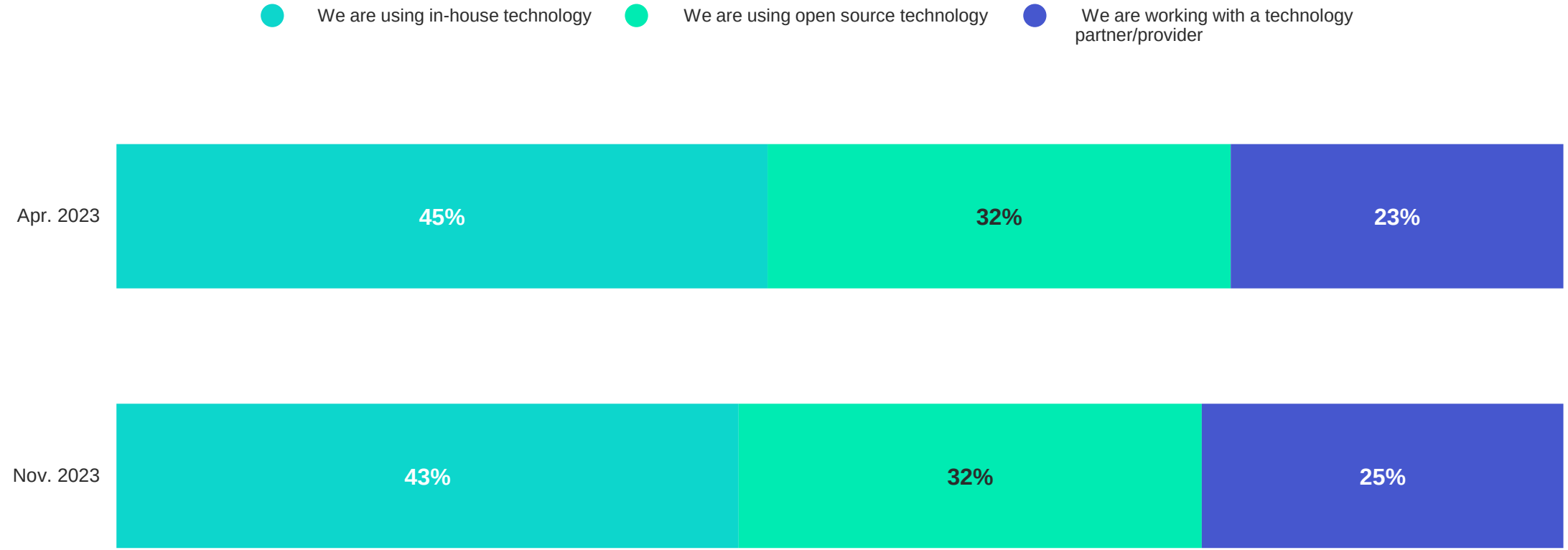
Among enterprises implementing or exploring generative AI, most are using either in-house technology (43%) or open-source technology (32%), with reported use of each remaining relatively unchanged since April 2023.

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



Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/implementing generative AI : April 2023 = 1,660n, November 2023 = 1,873n

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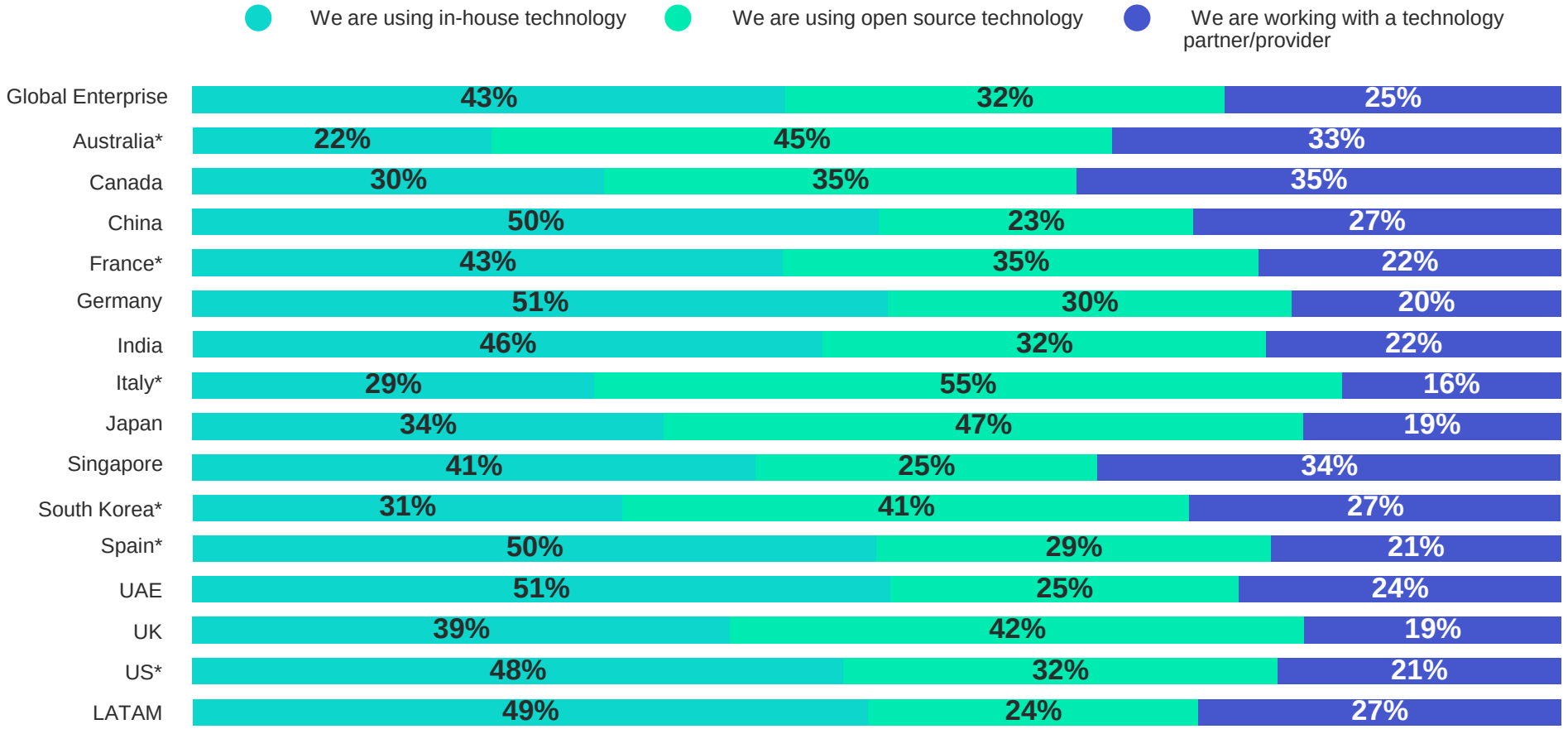
IT Professionals at companies exploring or deploying generative AI in Australia, Italy, Japan, and the UK are more likely than the global average to report that their companies are using open-source technology.

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



Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/implementing generative AI : Global Enterprise = 1,873n, Australia = 64n, Canada = 113n, China = 305n, France = 95n, Germany = 122n, India = 204n, Italy = 75n, Japan = 122n, Singapore = 124n, South Korea = 70n, Spain = 66n, UAE = 153n, UK = 112n, US = 82n, LATAM = 166n
*Sample size is between 50 and 99

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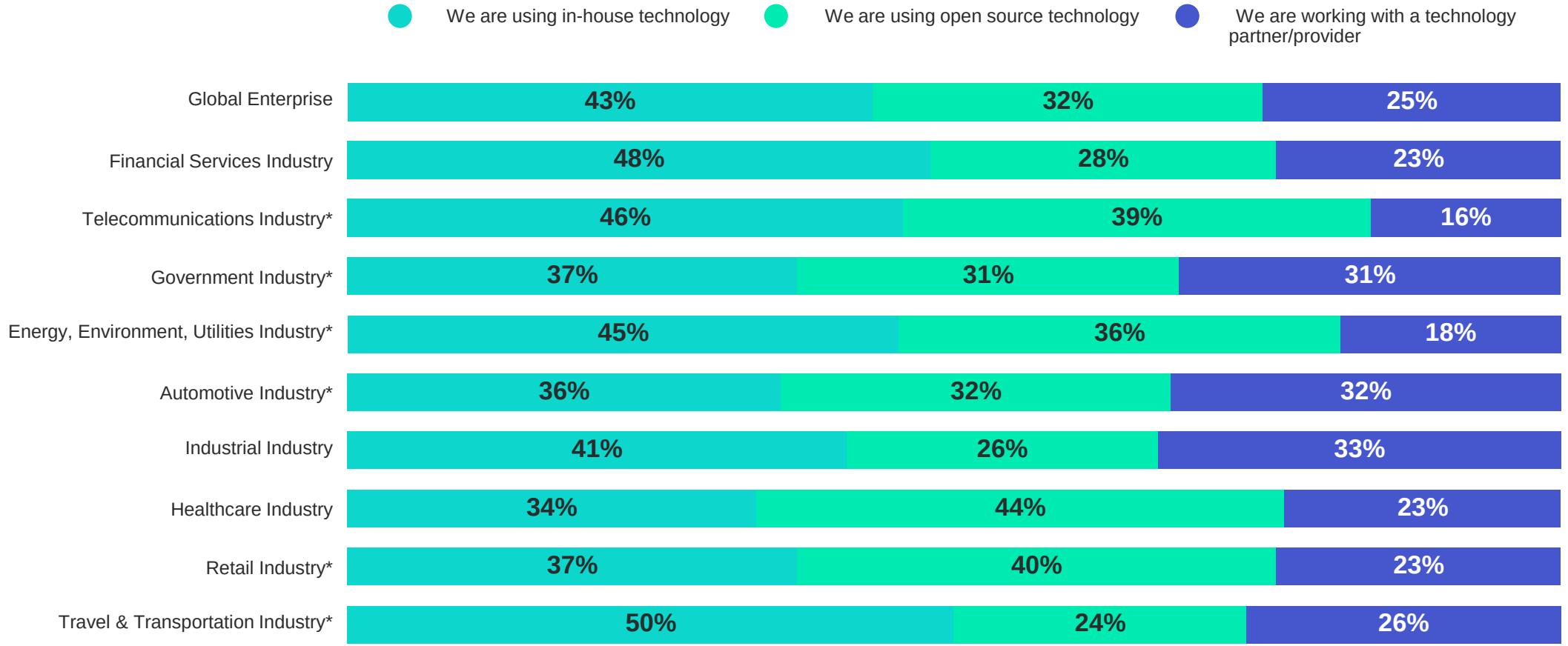
In-house technology is most likely to be utilized in the financial services, telecommunications, energy, and travel industries.

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



Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/implementing generative AI : Global Enterprise = 1,873n, Financial Services = 179n, Telecommunications = 83n, Government = 89n, Energy = 55n, Automotive = 55n, Industrial = 265n, Healthcare = 101n, Retail = 81n, Travel = 54n
*Sample size is between 50 and 99; Note: Media & Entertainment, Chemicals/Oil/Gas, and Aerospace & Defense Industry samples sizes are too low to show

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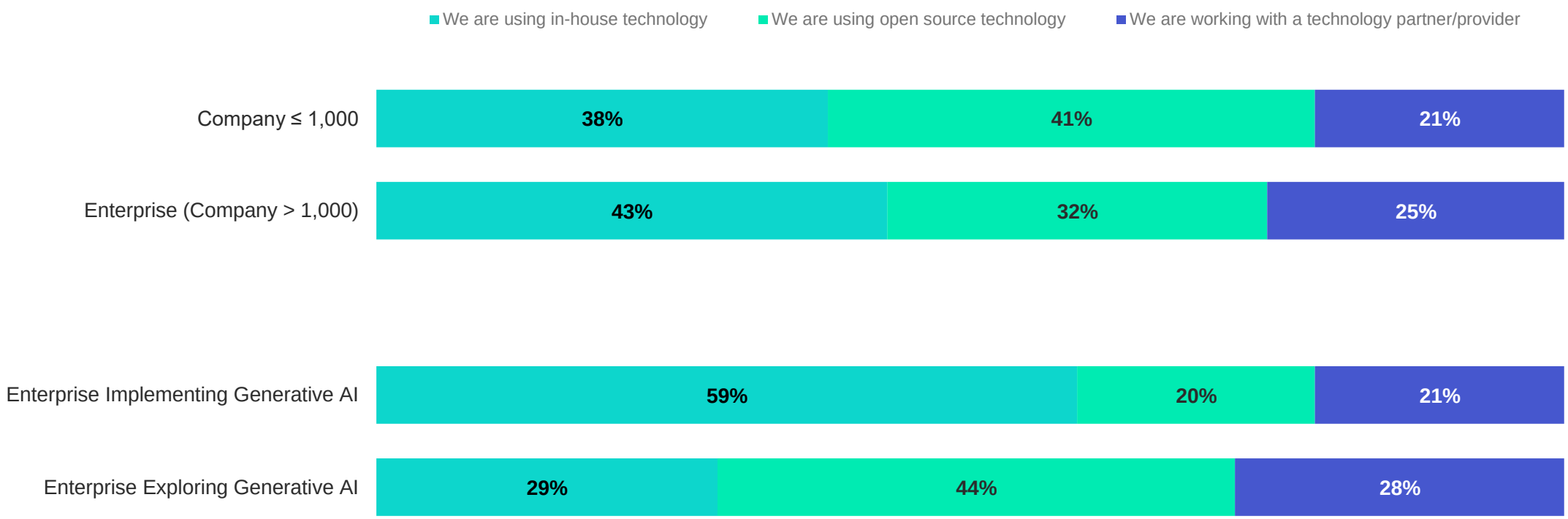
Enterprises with more established generative AI practices are more likely to be using in-house technology over open-source technology. Similarly, in-house technology is most likely to be used by companies with more than 1,000 employees exploring or implementing generative AI.

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



Base IT Professionals at companies exploring/implementing generative AI: Enterprises (organizations > 1,000 employees) = 1,873n, Company ≤ 1,000 = 4,288n, Enterprise Implementing Generative AI = 894n, Enterprise Exploring Generative AI = 979n

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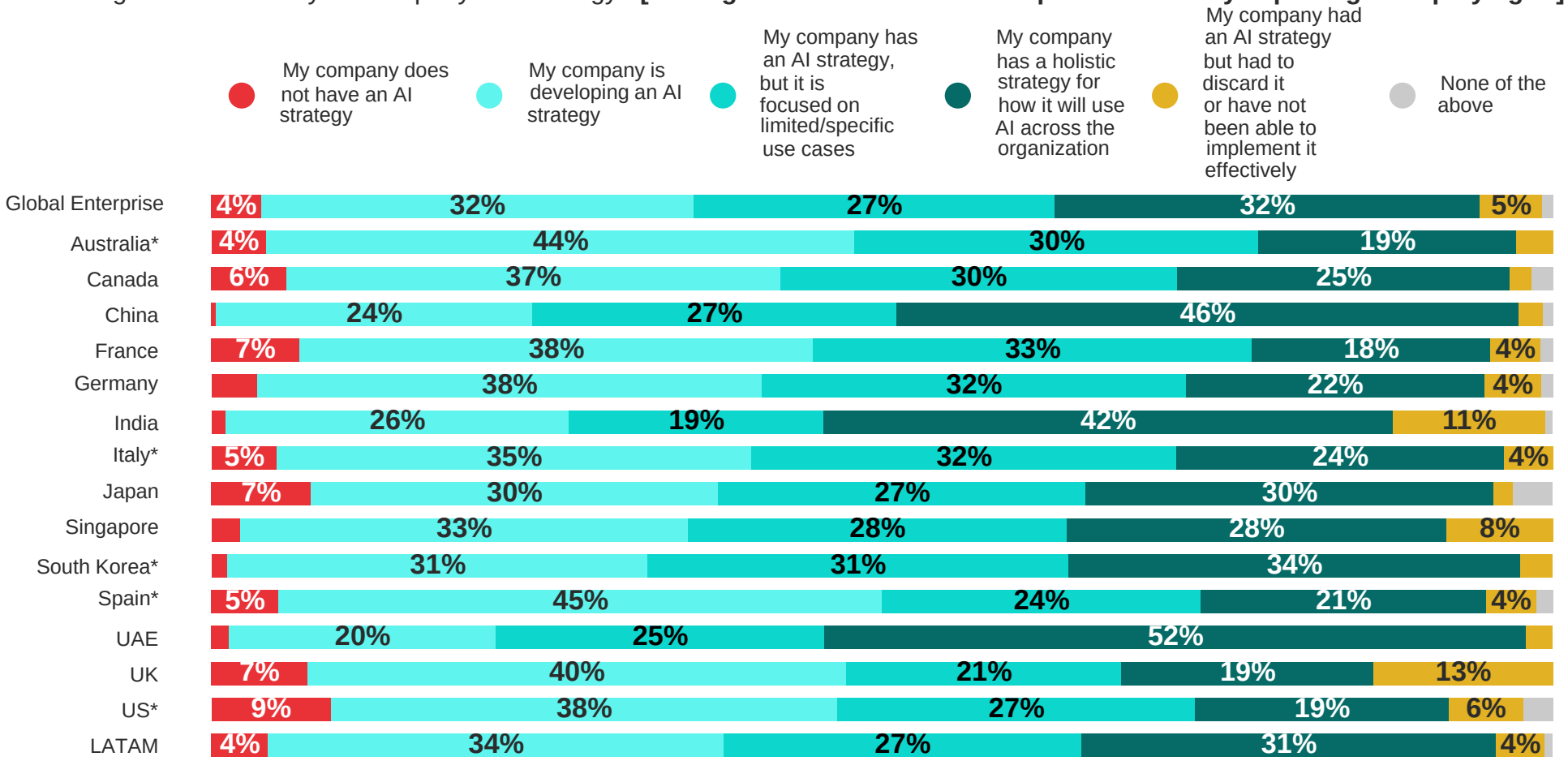
Most enterprises actively exploring or deploying AI have some form of AI strategy, with 27% reporting that their company has an AI strategy for limited/specific use cases and about a third (32%) stating that their organization already has a holistic strategy in place. 32% are in the process of developing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

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



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*Sample size is between 50 and 99

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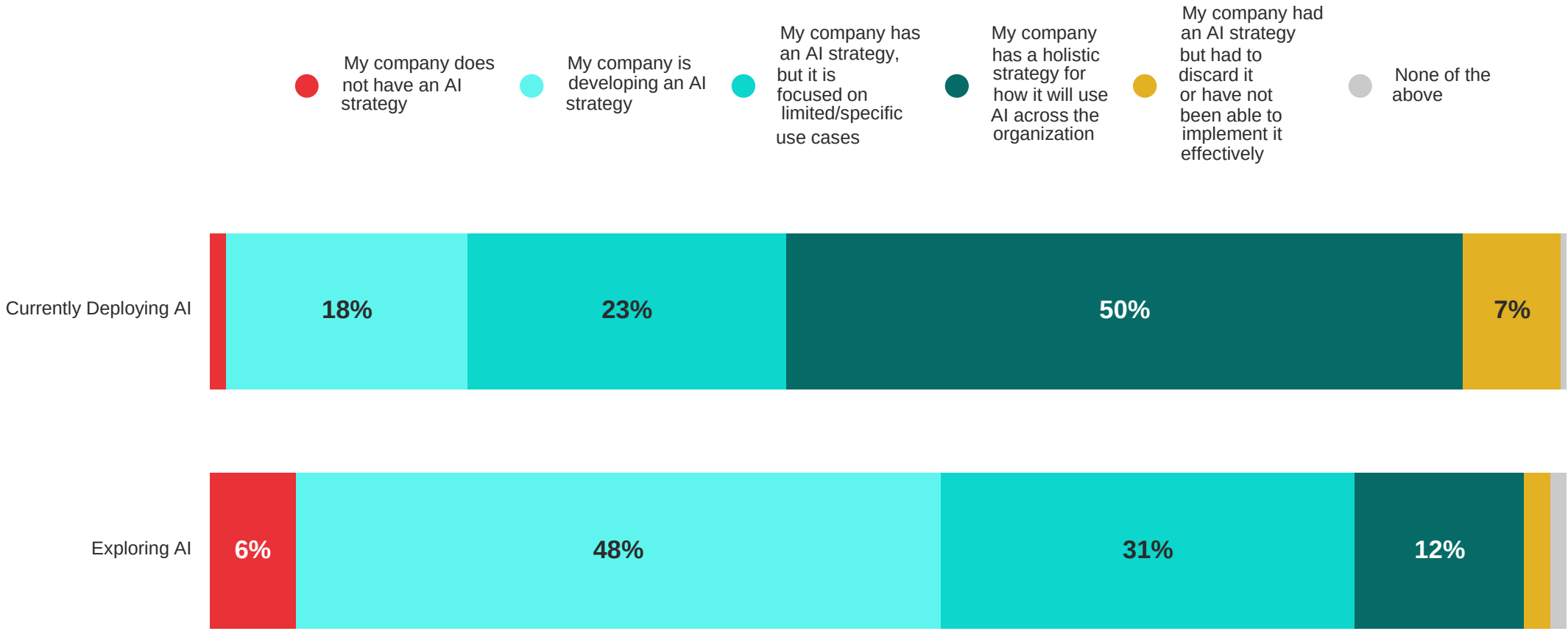
Enterprises exploring AI are more likely to be in the beginning stages of AI strategy, while large organizations deploying AI are more likely to have a holistic strategy in place.

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



Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/deploying AI: Currently Deploying AI = 984n, Exploring AI = 930n

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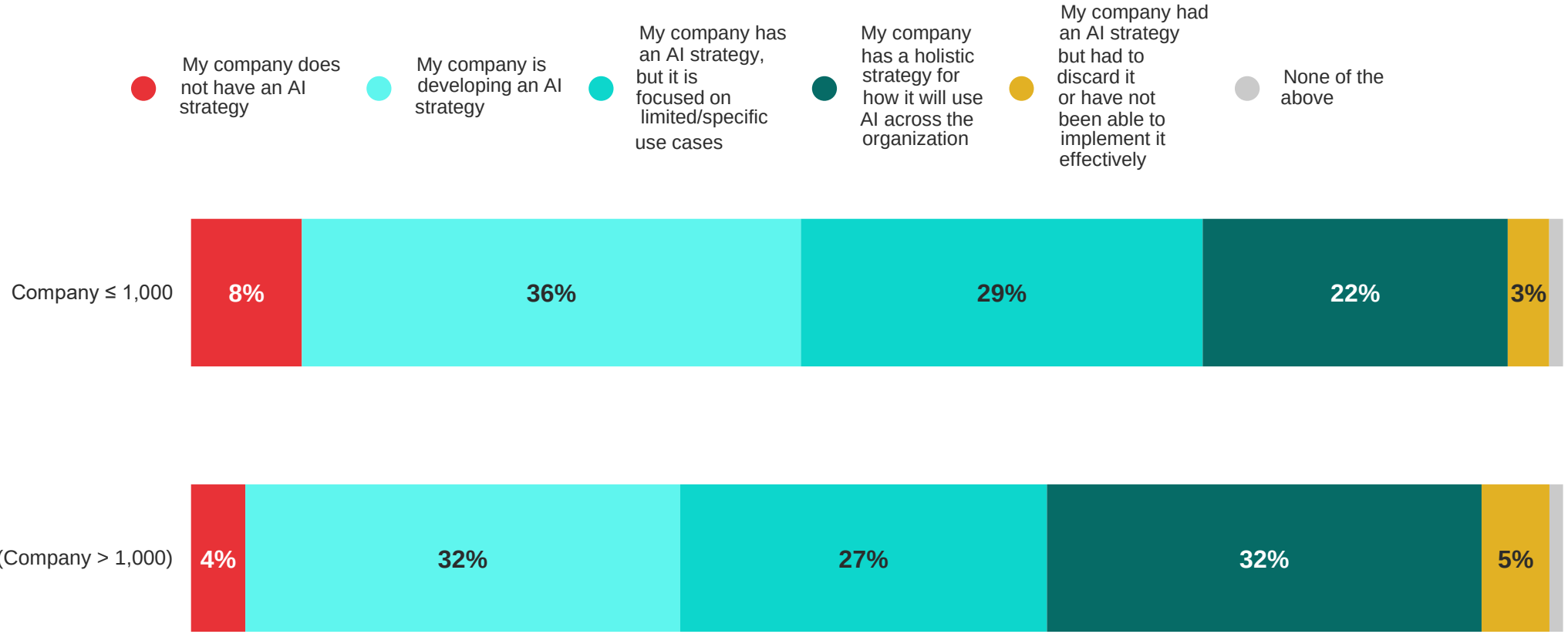
Larger organizations exploring or deploying AI are more likely than smaller organizations to have a holistic AI strategy in place (32% vs. 22%).

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



Base IT Professionals at companies exploring/deploying AI: Enterprises (organizations > 1,000 employees) = 1,914n, Company ≤ 1,000 = 4,402n

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

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

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

Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/deploying AI: Global Enterprise = 1,914n, Australia = 73n, Canada = 125n, China = 272n, France = 107n, Germany = 117n, India = 184n, Italy = 82n, Japan = 135n, Singapore = 138n, South Korea = 83n, Spain = 80n, UAE = 151n, UK = 112n, US = 90n, LATAM = 165n
*Sample size is between 50 and 99
Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

MORNING CONSULT

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

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

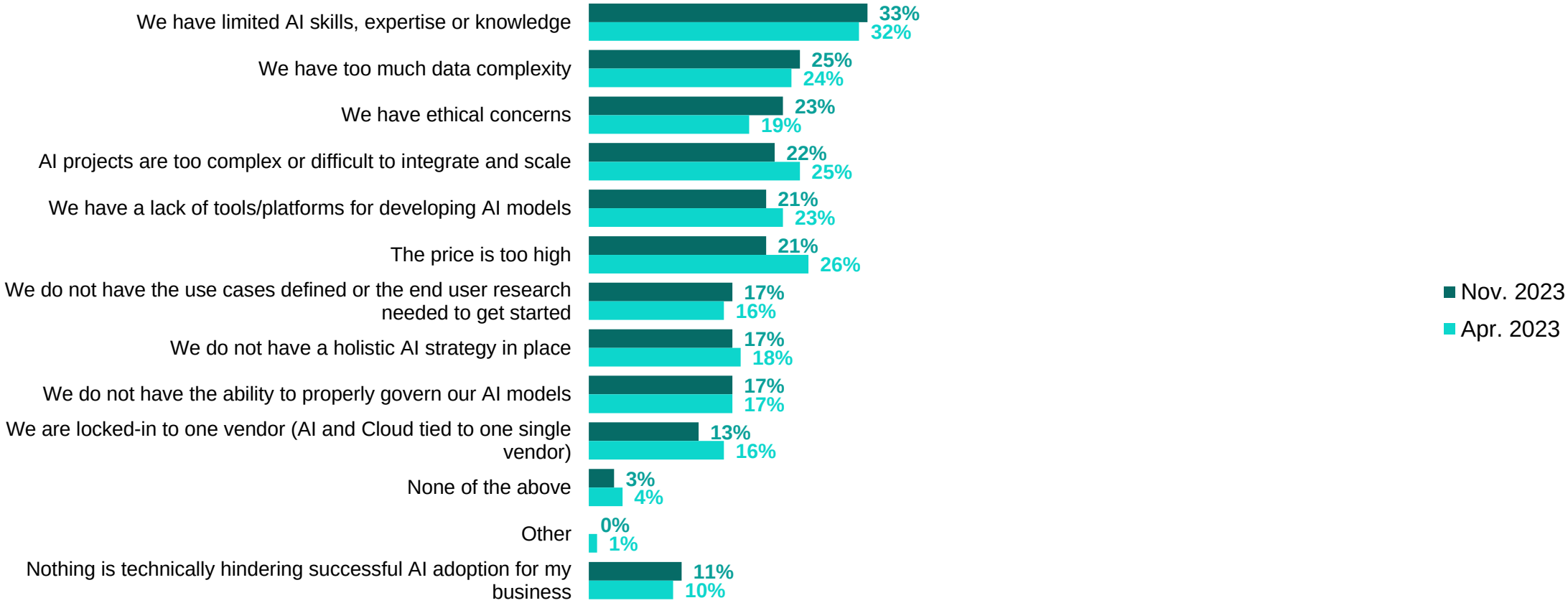
	Global Enterprise	Australia*	Canada	China	France	Germany	India	Italy	Japan	Singapore	South Korea*	Spain	UAE	UK	US	LATAM
AI solutions are more accessible and easier to deploy	43%	40%	41%	47%	38%	40%	57%	38%	36%	41%	49%	26%	48%	38%	40%	50%
Data, AI and automation skills are more prevalent, teams are positioned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

Base IT Professionals at Enterprises (organizations > 1,000 employees): Global Enterprise = 2,342n, Australia = 92n, Canada = 147n, China = 316n, France = 151n, Germany = 154n, India = 215n, Italy = 112n, Japan = 169n, Singapore = 148n, South Korea = 94n, Spain = 101n, UAE = 168n, UK = 145n, US = 126n, LATAM = 204n
*Sample size is between 50 and 99
Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

MORNING CONSULT

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

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



Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/deploying AI: April 2023 = 1,767n, November 2023 = 1,914n

MORNING CONSULT

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

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

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

Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/deploying AI: Global Enterprise = 1,914n, Australia = 73n, Canada = 125n, China = 272n, France = 107n, Germany = 117n, India = 184n, Italy = 82n, Japan = 135n, Singapore = 138n, South Korea = 83n, Spain = 80n, UAE = 151n, UK = 112n, US = 90n, LATAM = 165n
*Sample size is between 50 and 99
Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

MORNING CONSULT

Barriers to AI Adoption: Cross Selection Analysis

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

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

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

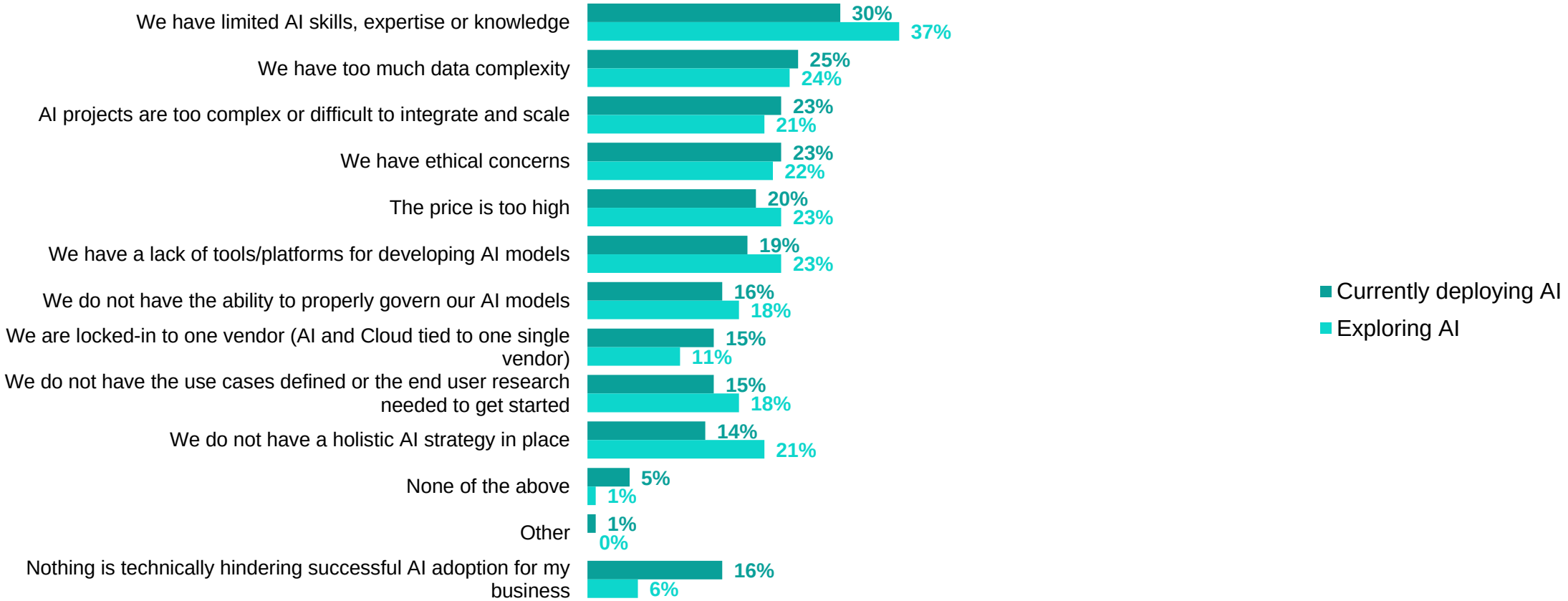
- For most IT Professionals globally at large companies deploying or exploring AI, lack of skill is the main obstacle for success to adopt AI (33%).
  - Those who report **lack of skill** tend to **report other hinderances**.
  - Those who say they are **locked into a vendor cite fewer additional challenges**.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

Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/deploying AI: Global Enterprise = 1,914n
Note: dark green shading indicates the most selected additional barrier while light green shading indicates the least selected additional barrier

MORNING CONSULT

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

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



Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/deploying AI: Currently Deploying AI = 984n, Exploring AI = 930n

MORNING CONSULT

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

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

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

Base IT Professionals at Enterprises (organizations > 1,000 employees) deploying AI: Global Enterprise = 984n, Canada = 55n, China = 157n, Germany = 50n, India = 126n, Japan = 57n, Singapore = 78n, UAE = 98n, UK = 53n, LATAM = 96n
*Sample size is between 50 and 99; **Australia, France, Italy, South Korea, Spain, and US samples sizes are too low to show
Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

MORNING CONSULT

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

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

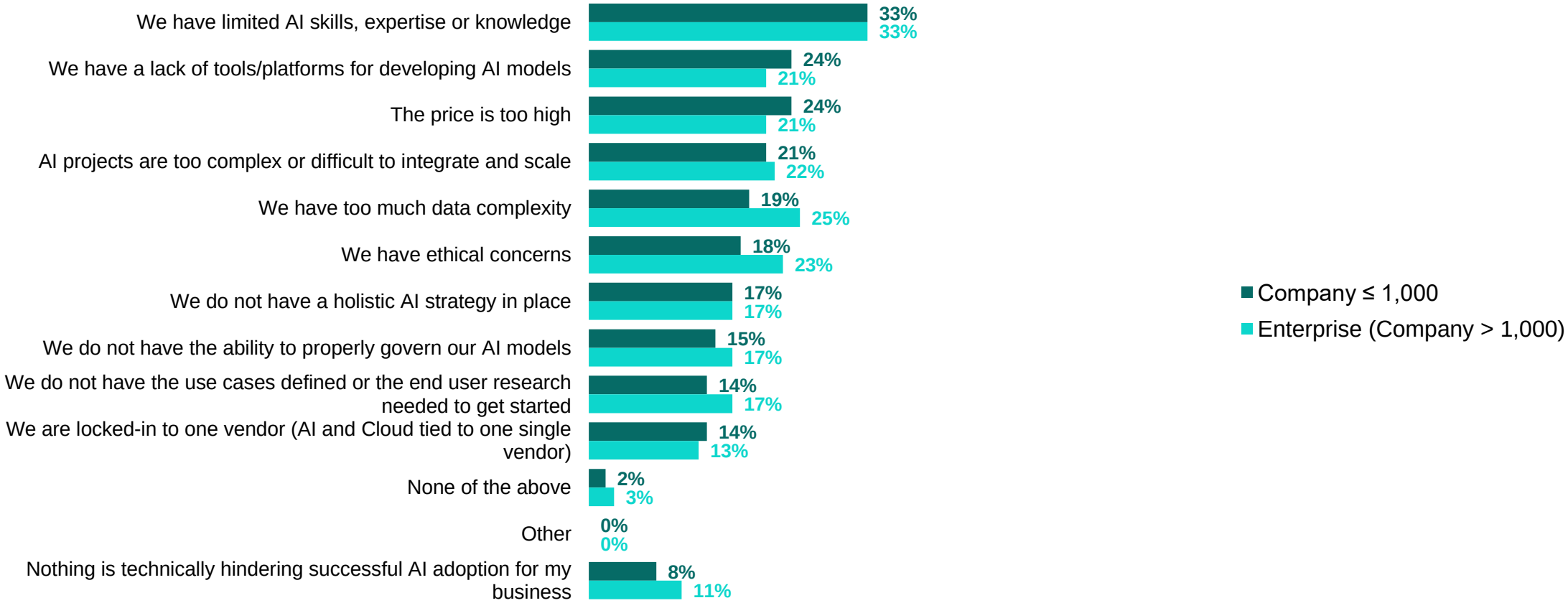
	Global Enterprise	Australia**	Canada*	China	France*	Germany*	India*	Italy**	Japan*	Singapore*	South Korea**	Spain*	UAE*	UK*	US**	LATAM*
We have limited AI skills, expertise or knowledge	37%		43%	31%	21%	37%	36%		44%	42%		12%	36%	41%		45%
We have too much data complexity	24%		31%	30%	18%	13%	19%		21%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

Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring AI: Global Enterprise = 930, Canada = 70n, China = 115n, France = 68n, Germany = 67n, India = 58n, Japan = 78n, Singapore = 60n, Spain = 52n, UAE = 53n, UK = 59n, LATAM = 69n
*Sample size is between 50 and 99; **Australia, Italy, South Korea, and US samples sizes are too low to show
Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

MORNING CONSULT

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

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

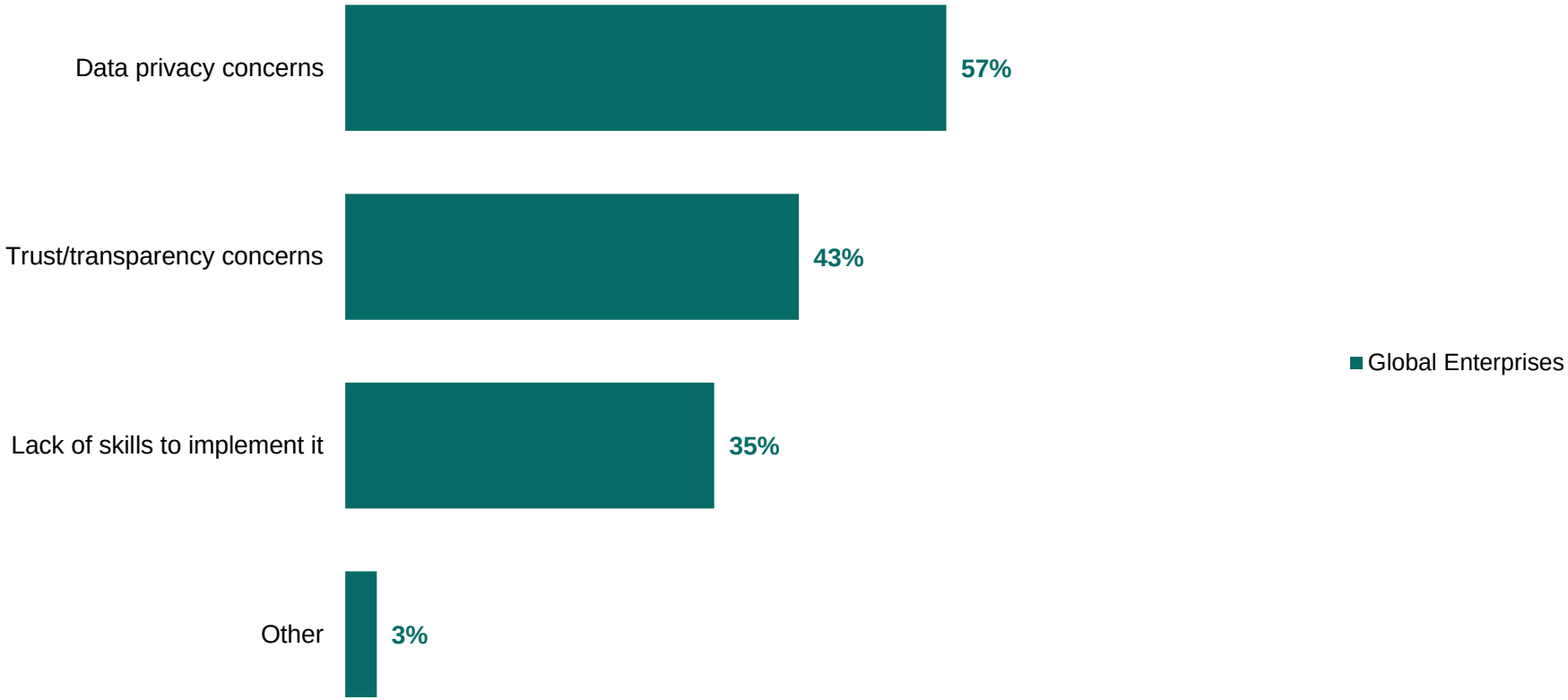


Base IT Professionals exploring/deploying AI: Enterprises (organizations > 1,000 employees) = 1,914n, Company ≤ 1,000 = 4,402n

MORNING CONSULT

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

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



Base IT Professionals at Enterprises (organizations > 1,000 employees) not exploring/implementing generative AI: Global Enterprise = 271n
Note: Market breakout sample sizes are too low to show

AGENDA

AI ADOPTION & INVESTMENTS

DRIVERS & BARRIERS OF AI

CURRENT USES OF AI

AI ETHICS AND RESPONSIBILITY

AI'S IMPACT ON EMPLOYEES

CURRENT USES OF AI

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

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

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

Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/deploying AI: Global Enterprise = 1,914n, Australia = 73n, Canada = 125n, China = 272n, France = 107n, Germany = 117n, India = 184n, Italy = 82n, Japan = 135n, Singapore = 138n, South Korea = 83n, Spain = 80n, UAE = 151n, UK = 112n, US = 90n, LATAM = 165n
*Sample size is between 50 and 99
Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

MORNING CONSULT

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

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

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

Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/deploying AI: Global Enterprise = 1,914n, Financial Services = 179n, Telecommunications = 84n, Government = 99n, Energy = 55n, Automotive = 55n, Industrial = 266n, Healthcare = 110n, Retail = 94n, Travel = 57n
*Sample size is between 50 and 99; Note: Media & Entertainment, Chemicals/Oil/Gas, and Aerospace & Defense Industry samples sizes are too low to show
Note: : dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

CURRENT USES OF AI

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

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

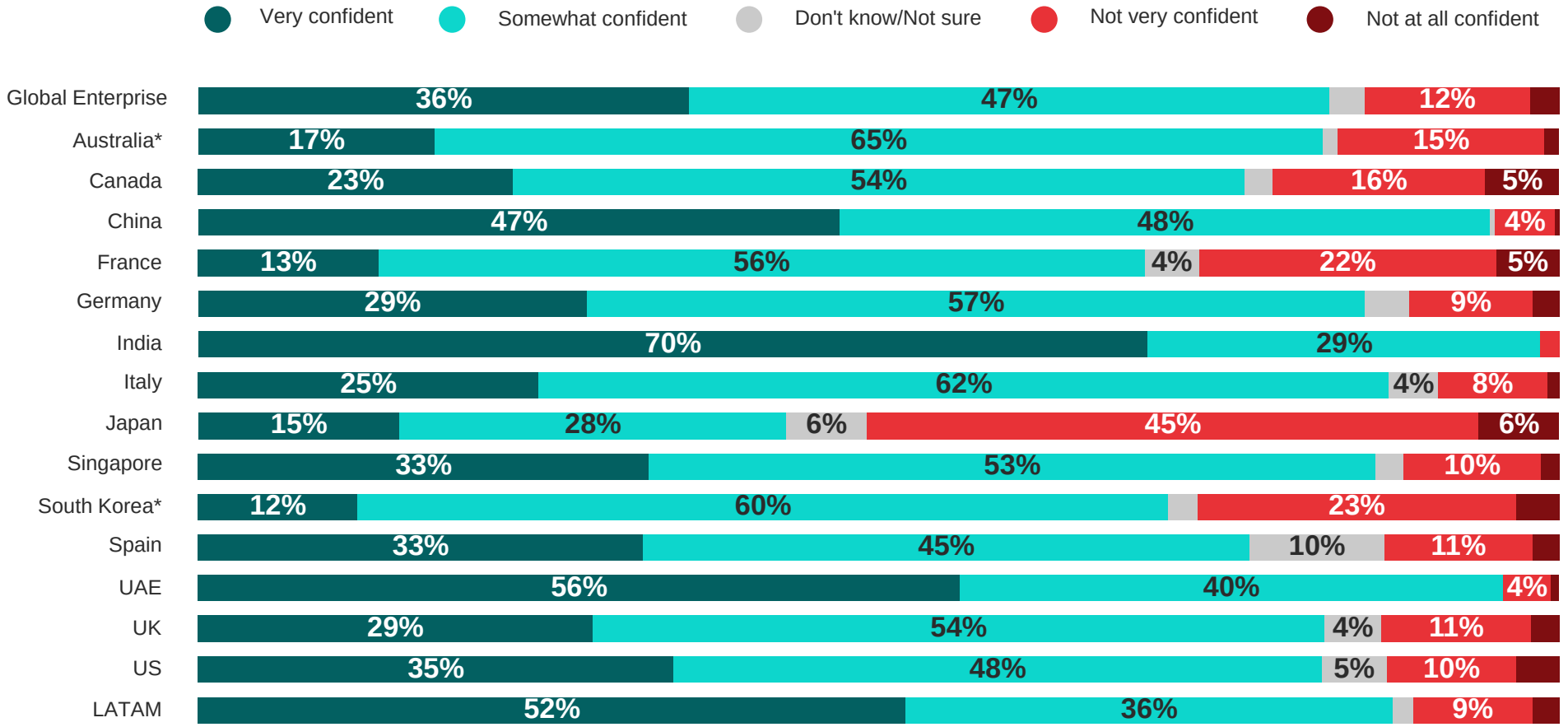
	Global Enterprise	Australia*	Canada	China	France	Germany	India	Italy*	Japan	Singapore	South Korea*	Spain*	UAE	UK	US*	LATAM
IT professionals	56%	49%	54%	50%	23%	59%	76%	50%	43%	63%	54%	50%	72%	57%	48%	62%
Data engineers	33%	32%	26%	28%	21%	29%	45%	27%	33%	41%	39%	24%	46%	32%	24%	37%
Developers and data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

Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/deploying AI: Global Enterprise = 1,914n, Australia = 73n, Canada = 125n, China = 272n, France = 107n, Germany = 117n, India = 184n, Italy = 82n, Japan = 135n, Singapore = 138n, South Korea = 83n, Spain = 80n, UAE = 151n, UK = 112n, US = 90n, LATAM = 165n
*Sample size is between 50 and 99
Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

MORNING CONSULT

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

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

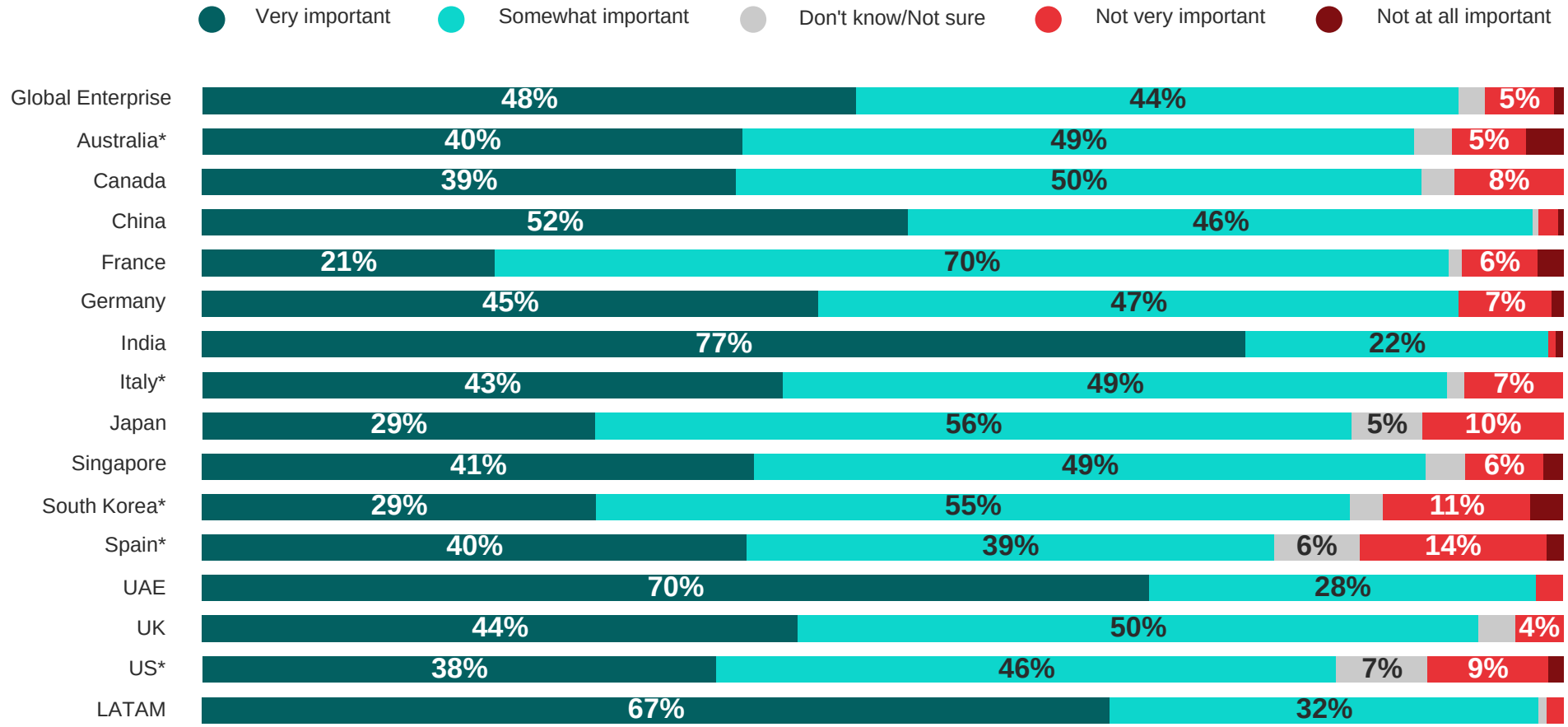


Base IT Professionals at Enterprises (organizations > 1,000 employees): Global Enterprise = 2,342n, Australia = 92n, Canada = 147n, China = 316n, France = 151n, Germany = 154n, India = 215n, Italy = 112n, Japan = 169n, Singapore = 148n, South Korea = 94n, Spain = 101n, UAE = 168n, UK = 145n, US = 126n,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

MORNING CONSULT

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

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



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

AGENDA

AI ADOPTION & INVESTMENTS

DRIVERS & BARRIERS OF AI

CURRENT USES OF AI

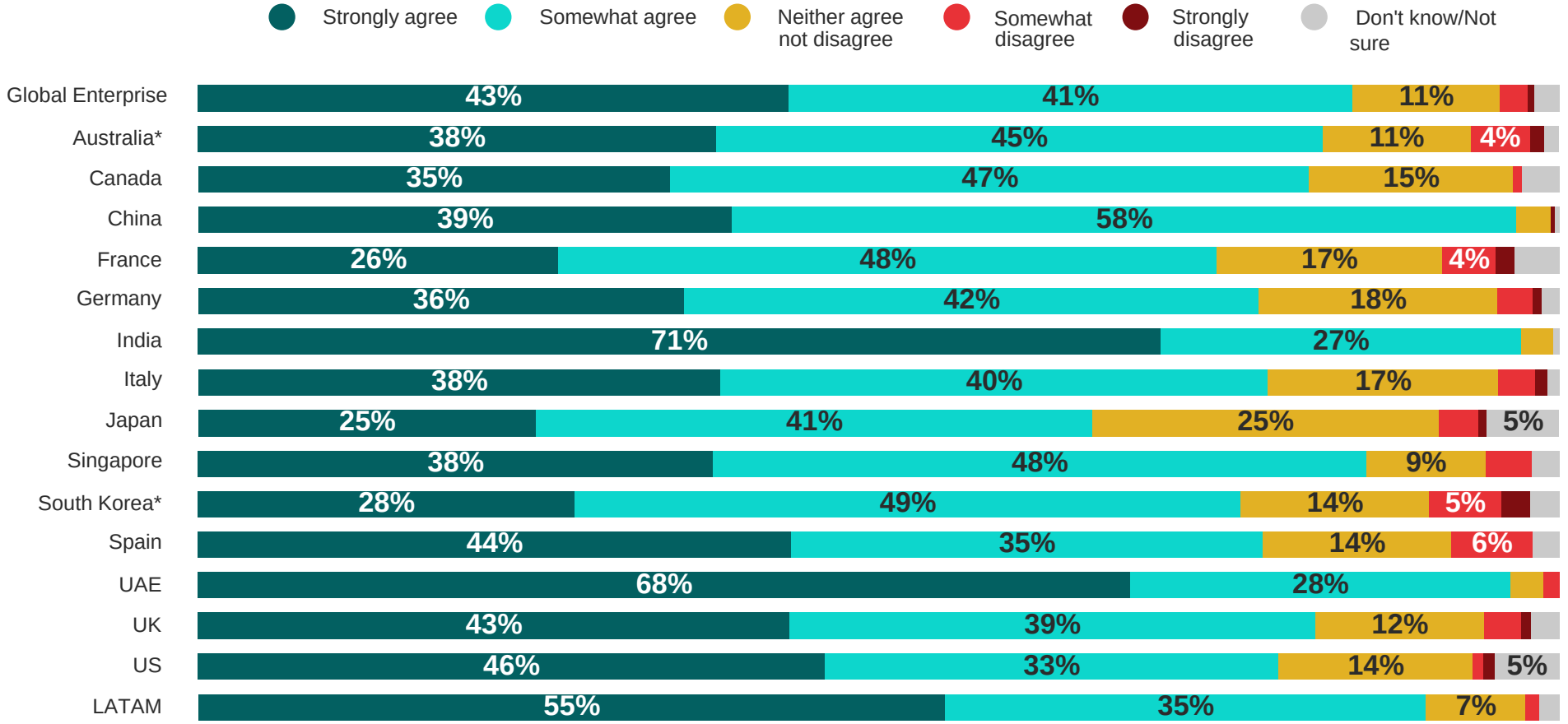
AI ETHICS AND RESPONSIBILITY

AI'S IMPACT ON EMPLOYEES

MORNING CONSULT

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

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



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

MORNING CONSULT

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

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

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

Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/deploying AI: Global Enterprise = 1,914n, Australia = 73n, Canada = 125n, China = 272n, France = 107n, Germany = 117n, India = 184n, Italy = 82n, Japan = 135n, Singapore = 138n, South Korea = 83n, Spain = 80n, UAE = 151n, UK = 112n, US = 90n, LATAM = 165n
*Sample size is between 50 and 99
Note: dark green shading indicates the most important statements while light green shading indicates the least important statements within a specific market

MORNING CONSULT

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

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

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

Base IT Professionals at Enterprises (organizations > 1,000 employees) deploying AI: Global Enterprise = 984n,, Canada = 55n, China = 157n, Germany = 50n, India = 126n, Japan = 57n, Singapore = 78n, UAE = 98n, UK = 53n, LATAM = 96n
*Sample size is between 50 and 99; **Australia, France, Italy, South Korea, Spain, and US samples sizes are too low to show
Note: dark green shading indicates the most important statements while light green shading indicates the least important statements within a specific market

MORNING CONSULT

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

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

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

Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring AI: Global Enterprise = 930n,, Canada = 70n, China = 115n, France = 68n, Germany = 67n, India = 58n, Japan = 78n, Singapore = 60n, Spain = 52n, UAE = 53n, UK = 59n, LATAM = 69n
*Sample size is between 50 and 99; **Australia, Italy, South Korea, and US samples sizes are too low to show
Note: dark green shading indicates the most important statements while light green shading indicates the least important statements within a specific market

MORNING CONSULT

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

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

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

Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/deploying AI : Global Enterprise = 1,914n, Australia = 73n, Canada = 125n, China = 272n, France = 107n, Germany = 117n, India = 184n, Italy = 82n, Japan = 135n, Singapore = 138n, South Korea = 83n, Spain = 80n, UAE = 151n, UK = 112n, US = 90n, LATAM = 165n
*Sample size is between 50 and 99
Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

MORNING CONSULT

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

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

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

Base IT Professionals at Enterprises (organizations > 1,000 employees) deploying AI: Global Enterprise = 984n, Canada = 55n, China = 157n, Germany = 50n, India = 126n, Japan = 57n, Singapore = 78n, UAE = 98n, UK = 53n, LATAM = 96n
*Sample size is between 50 and 99; **Australia, France, Italy, South Korea, Spain, and US samples sizes are too low to show
Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

MORNING CONSULT

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

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

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

Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring AI: Global Enterprise = 930n, Canada = 70n, China = 115n, France = 68n, Germany = 67n, India = 58n, Japan = 78n, Singapore = 60n, Spain = 52n, UAE = 53n, UK = 59n, LATAM = 69n
*Sample size is between 50 and 99; **Australia, Italy, South Korea, and US samples sizes are too low to show
Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

MORNING CONSULT

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

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

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

Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/deploying AI: Global Enterprise = 1,914n, Australia = 73n, Canada = 125n, China = 272n, France = 107n, Germany = 117n, India = 184n, Italy = 82n, Japan = 135n, Singapore = 138n, South Korea = 83n, Spain = 80n, UAE = 151n, UK = 112n, US = 90n, LATAM = 165n
*Sample size is between 50 and 99
Note: dark green shading indicates the biggest perceived barriers while light green shading indicates the lesser barriers within a specific market

MORNING CONSULT

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

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

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

Base IT Professionals at Enterprises (organizations > 1,000 employees) deploying AI: Global Enterprise = 984n, Canada = 55n, China = 157n, Germany = 50n, India = 126n, Japan = 57n, Singapore = 78n, UAE = 98n, UK = 53n, LATAM = 96n
*Sample size is between 50 and 99; **Australia, France, Italy, South Korea, Spain, and US samples sizes are too low to show
Note: dark green shading indicates the biggest perceived barriers while light green shading indicates the lesser barriers within a specific market

MORNING CONSULT

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

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

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

Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring AI: Global Enterprise = 930n, Canada = 70n, China = 115n, France = 68n, Germany = 67n, India = 58n, Japan = 78n, Singapore = 60n, Spain = 52n, UAE = 53n, UK = 59n, LATAM = 69n
*Sample size is between 50 and 99; **Australia, Italy, South Korea, and US samples sizes are too low to show
Note: dark green shading indicates the biggest perceived barriers while light green shading indicates the lesser barriers within a specific market

AGENDA

AI ADOPTION & INVESTMENTS

DRIVERS & BARRIERS OF AI

CURRENT USES OF AI

AI ETHICS AND RESPONSIBILITY

AI'S IMPACT ON EMPLOYEES

MORNING CONSULT

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

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

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

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

*Sample size is between 50 and 99

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

MORNING CONSULT

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

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

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

Base IT Professionals at Enterprises (organizations > 1,000 employees) exploring/deploying AI that say labor/skills shortages help drive AI adoption at their enterprise: Global Enterprise = 488n, China = 59n, India = 52n, Japan = 64n
*Sample size is between 50 and 99; Note: Australia, Canada, France, Germany, Italy, Singapore, South Korea, Spain, UAE, UK, US, and LATAM sample sizes are too low to show
Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

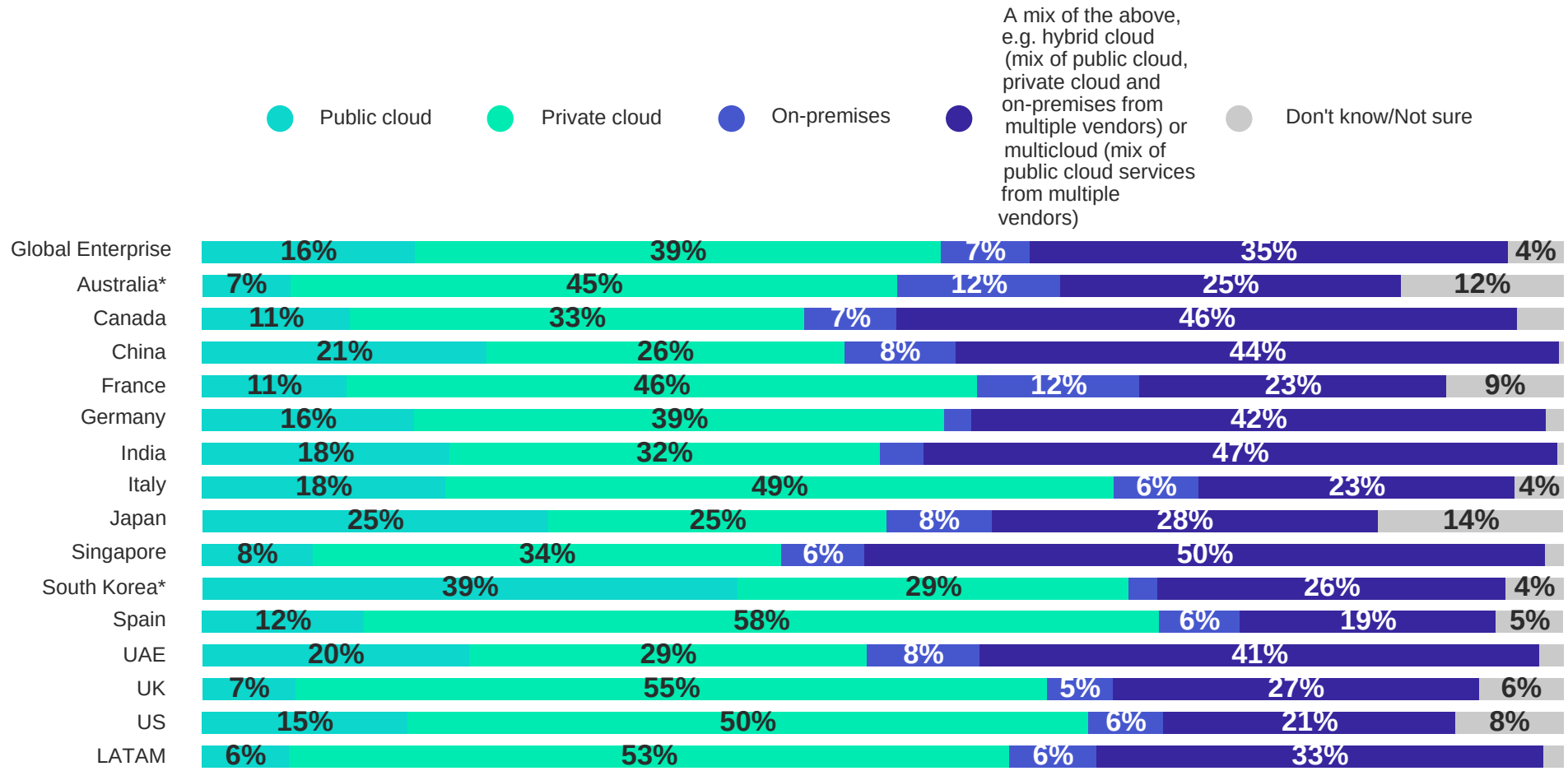
IBM GLOBAL AI ADOPTION INDEX

APPENDIX

MORNING CONSULT

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

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

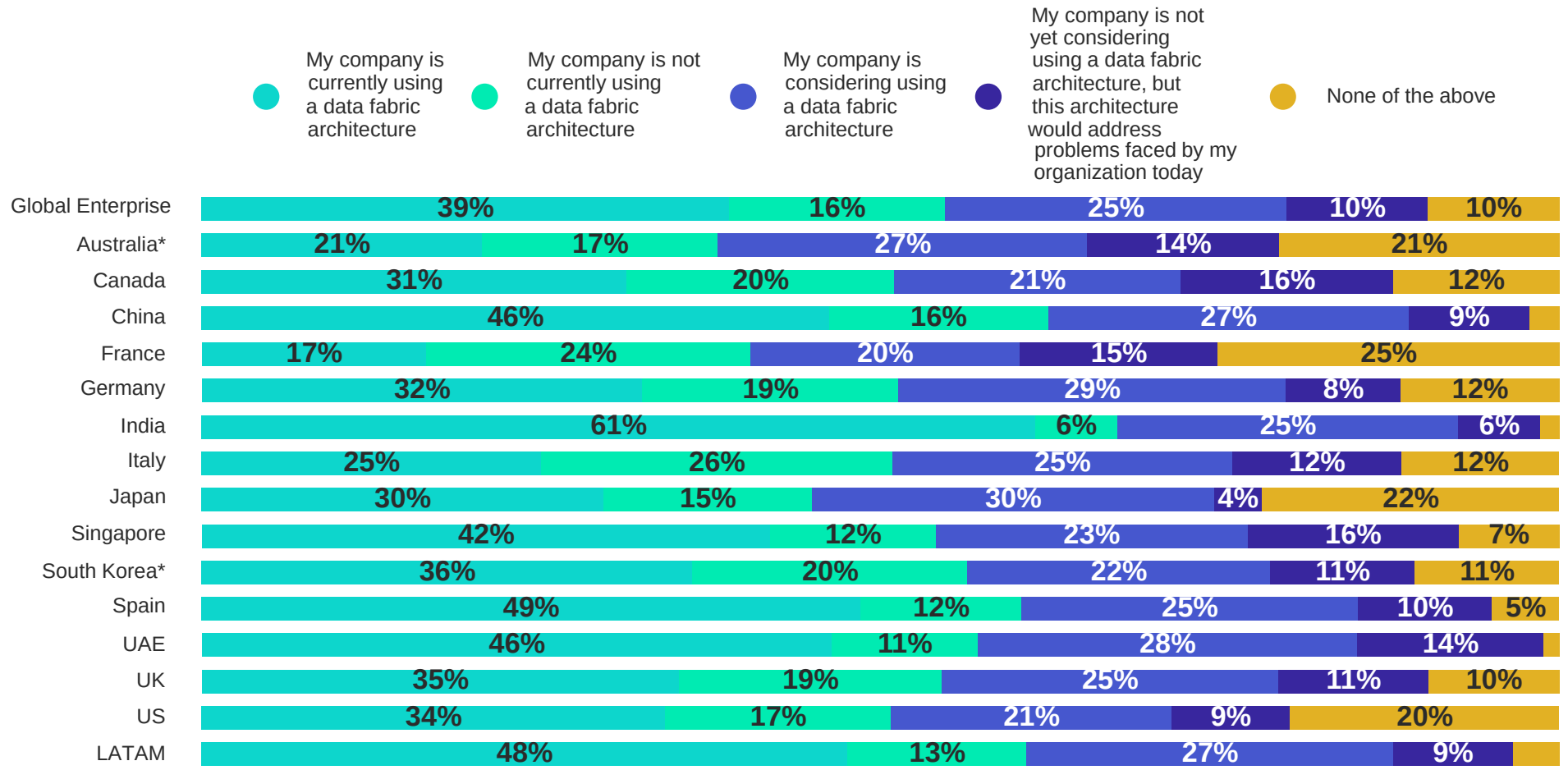


Base IT Professionals at Enterprises (organizations > 1,000 employees): Global Enterprise = 2,342n, Australia = 92n, Canada = 147n, China = 316n, France = 151n, Germany = 154n, India = 215n, Italy = 112n, Japan = 169n, Singapore = 148n, South Korea = 94n, Spain = 101n, UAE = 168n, UK = 145n, US = 126n,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

MORNING CONSULT

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

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

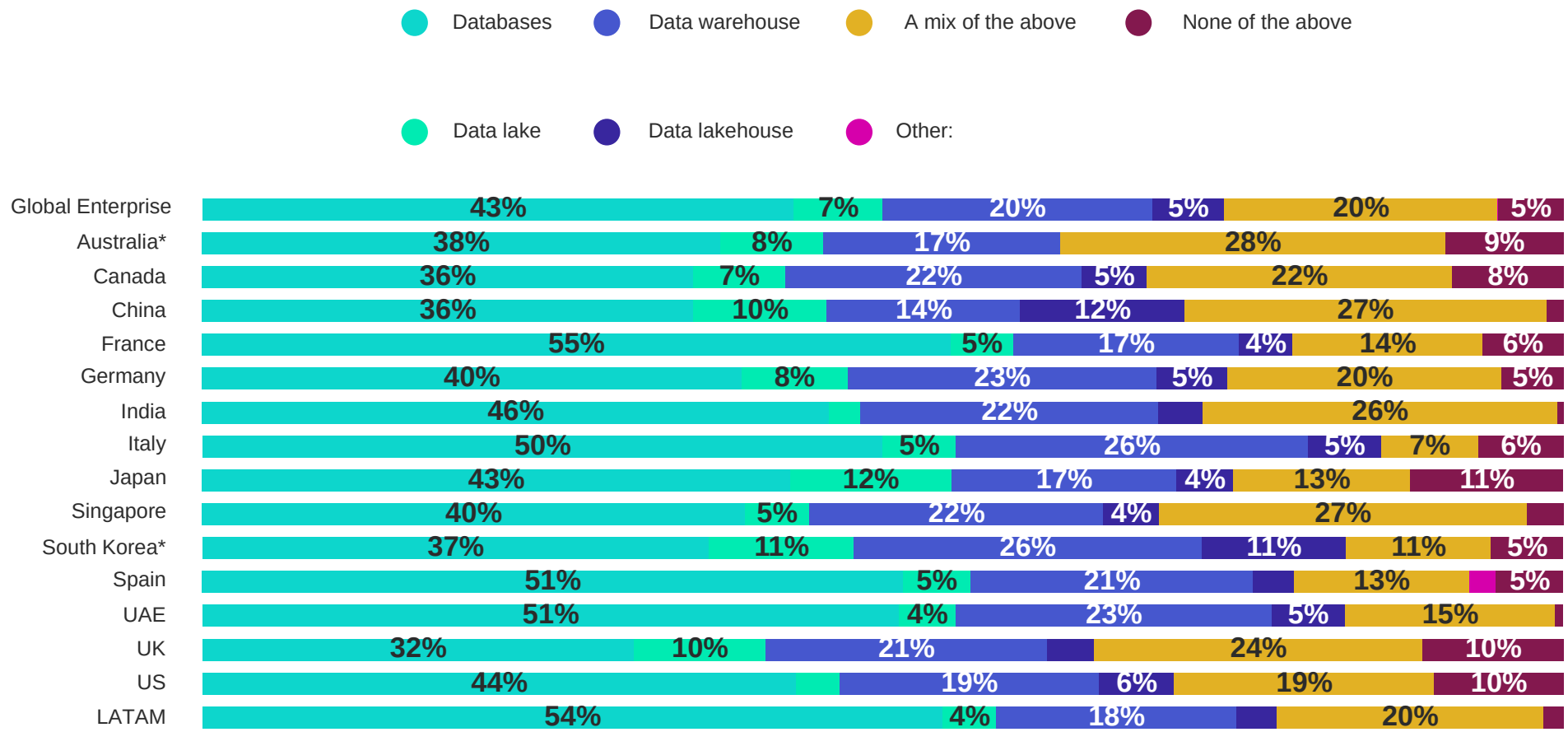


Base IT Professionals at Enterprises (organizations > 1,000 employees): Global Enterprise = 2,342n, Australia = 92n, Canada = 147n, China = 316n, France = 151n, Germany = 154n, India = 215n, Italy = 112n, Japan = 169n, Singapore = 148n, South Korea = 94n, Spain = 101n, UAE = 168n, UK = 145n, US = 126n,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

MORNING CONSULT

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

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

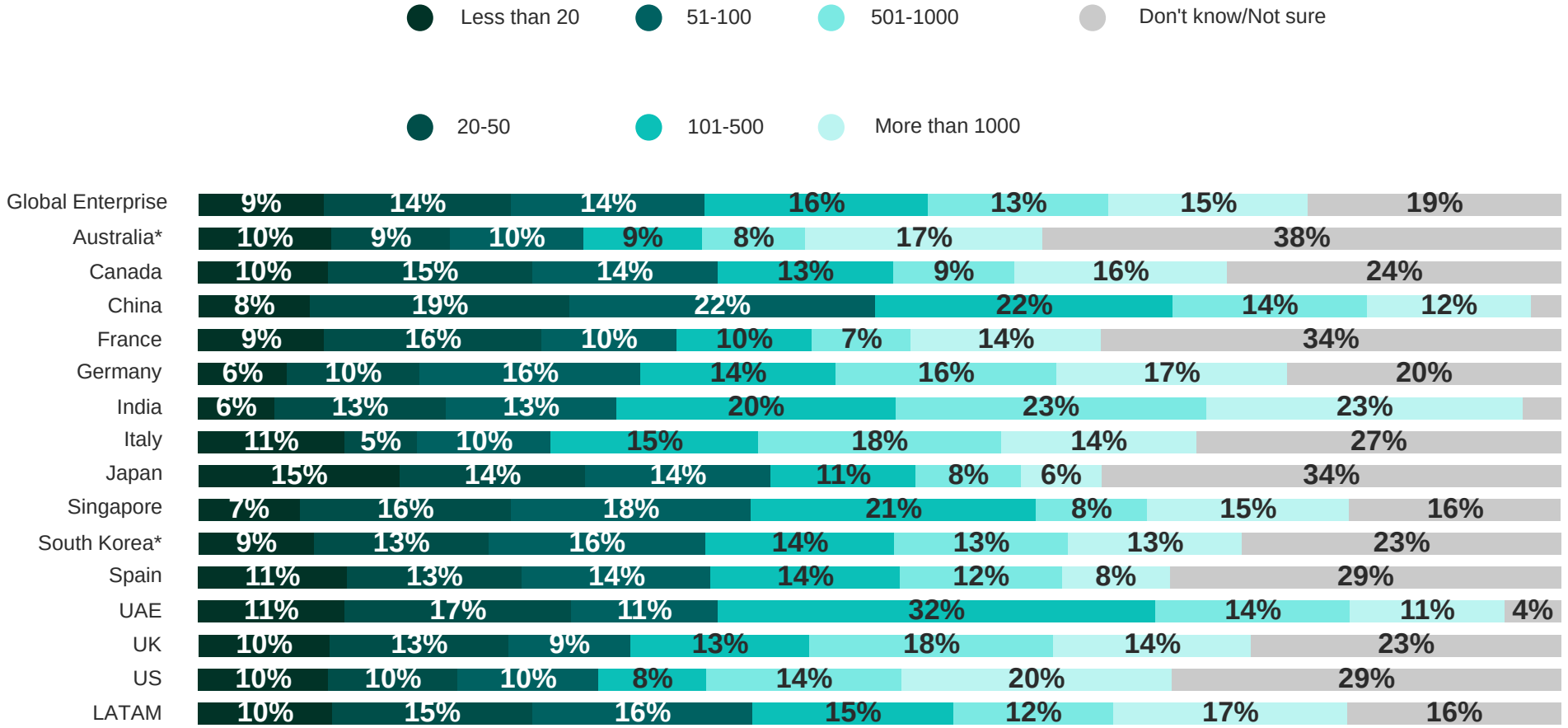


Base IT Professionals at Enterprises (organizations > 1,000 employees): Global Enterprise = 2,342n, Australia = 92n, Canada = 147n, China = 316n, France = 151n, Germany = 154n, India = 215n, Italy = 112n, Japan = 169n, Singapore = 148n, South Korea = 94n, Spain = 101n, UAE = 168n, UK = 145n, US = 126n,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

MORNING CONSULT

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

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

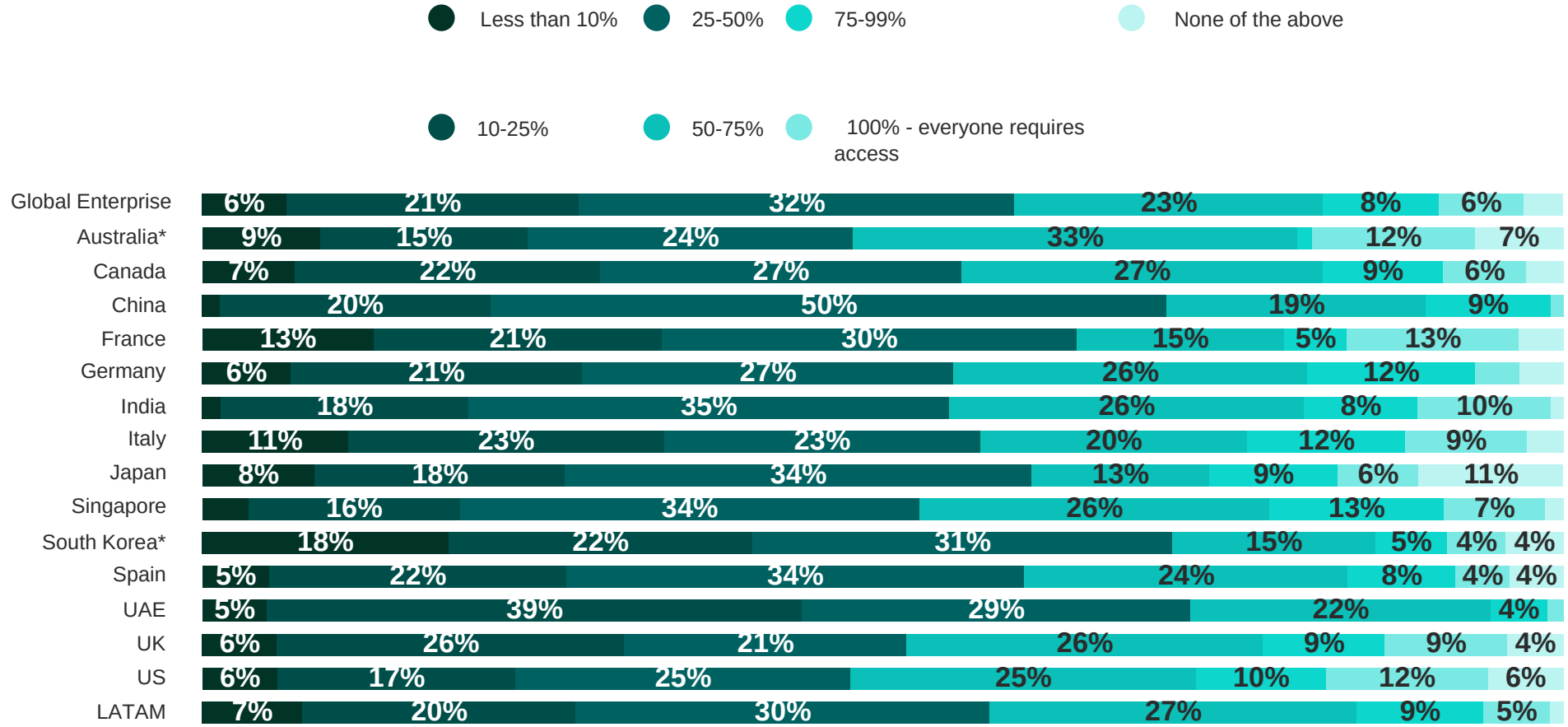


Base IT Professionals at Enterprises (organizations > 1,000 employees): Global Enterprise = 2,342n, Australia = 92n, Canada = 147n, China = 316n, France = 151n, Germany = 154n, India = 215n, Italy = 112n, Japan = 169n, Singapore = 148n, South Korea = 94n, Spain = 101n, UAE = 168n, UK = 145n, US = 126n,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

MORNING CONSULT

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

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



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*Sample size is between 50 and 99

MORNING CONSULT

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

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

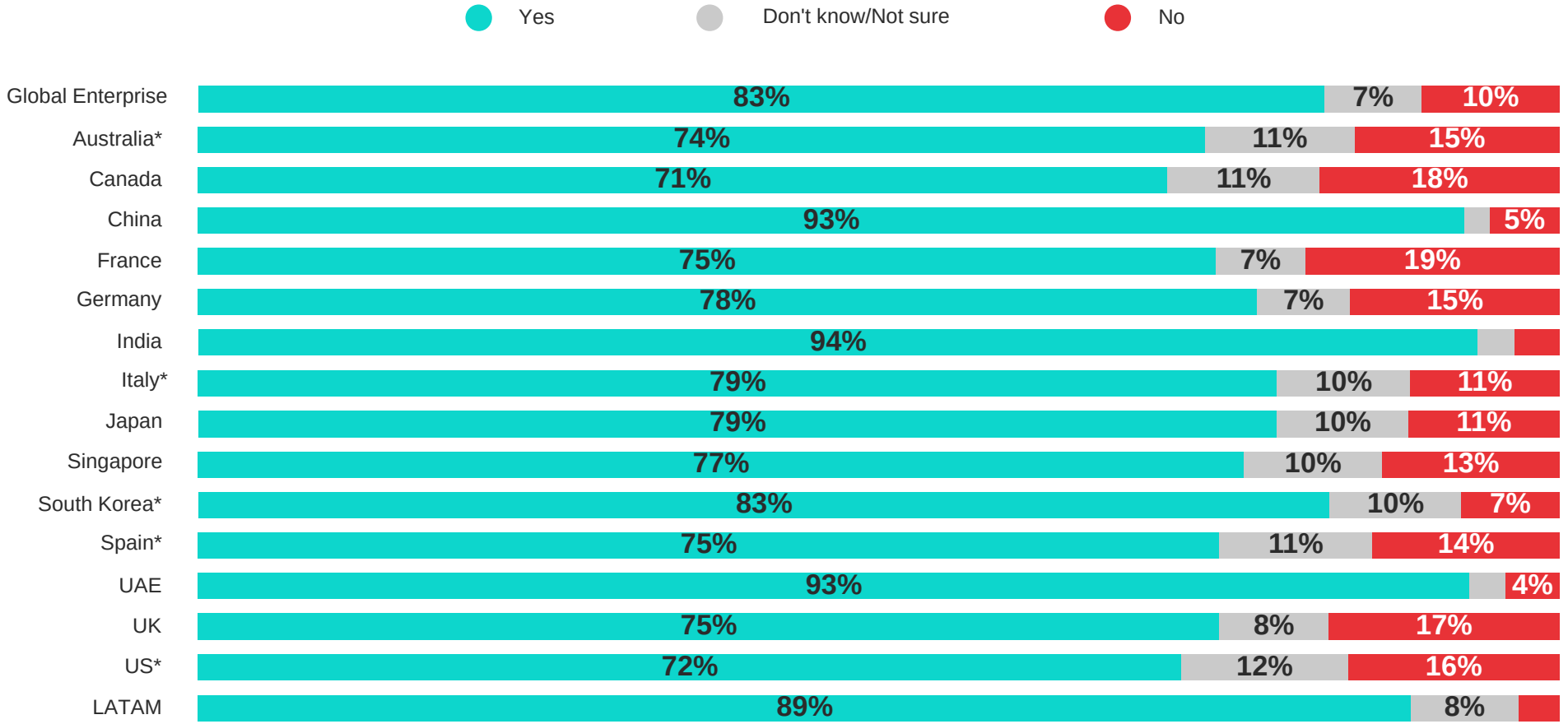
	Global Enterprise	Australia*	Canada	China	France	Germany	India	Italy	Japan	Singapore	South Korea*	Spain	UAE	UK	US	LATAM
Ensuring data security	43%	45%	56%	36%	46%	40%	39%	36%	49%	51%	50%	48%	39%	38%	46%	42%
Ensuring data governance, compliance and privacy	38%	42%	48%	30%	42%	38%	34%	37%	41%	39%	38%	41%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

Base IT Professionals at Enterprises (organizations > 1,000 employees): Global Enterprise = 2,342n, Australia = 92n, Canada = 147n, China = 316n, France = 151n, Germany = 154n, India = 215n, Italy = 112n, Japan = 169n, Singapore = 148n, South Korea = 94n, Spain = 101n, UAE = 168n, UK = 145n, US = 126n, LATAM = 204n
*Sample size is between 50 and 99
Note: dark green shading indicates the most difficult statements while light green shading indicates the least difficult statements within a specific market

MORNING CONSULT

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

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



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

MORNING CONSULT

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

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

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

Base IT Professionals at Enterprises (organizations > 1,000 employees): Global Enterprise = 2,342n, Australia = 92n, Canada = 147n, China = 316n, France = 151n, Germany = 154n, India = 215n, Italy = 112n, Japan = 169n, Singapore = 148n, South Korea = 94n, Spain = 101n, UAE = 168n, UK = 145n, US = 126n, LATAM = 204n
*Sample size is between 50 and 99
Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

MORNING CONSULT

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

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

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

Base IT Professionals at Enterprises (organizations > 1,000 employees) using NLP: Global Enterprise = 920n, Canada = 53n, China = 117n, Germany = 59n, India = 112n, Japan = 71n, Singapore = 72n, UAE = 83n, UK = 55n, LATAM = 88n
*Sample size is between 50 and 99, **Australia, France, Italy, South Korea, Spain, and US sample sizes too low to show
Note: dark green shading indicates the biggest perceived barriers while light green shading indicates the lesser barriers within a specific market

MORNING CONSULT

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

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

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

Base IT Professionals at Enterprises (organizations > 1,000 employees): Global Enterprise = 2,342n, Australia = 92n, Canada = 147n, China = 316n, France = 151n, Germany = 154n, India = 215n, Italy = 112n, Japan = 169n, Singapore = 148n, South Korea = 94n, Spain = 101n, UAE = 168n, UK = 145n, US = 126n, LATAM = 204n
*Sample size is between 50 and 99
Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

MORNING CONSULT

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

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

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

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

*Sample size is between 50 and 99

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

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

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

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

Base IT Professionals at Enterprises (organizations > 1,000 employees): Global Enterprise = 2,342n, Australia = 92n, Canada = 147n, China = 316n, France = 151n, Germany = 154n, India = 215n, Italy = 112n, Japan = 169n, Singapore = 148n, South Korea = 94n, Spain = 101n, UAE = 168n, UK = 145n, US = 126n, LATAM = 204n
*Sample size is between 50 and 99
Note: dark green shading indicates the statements with the highest interest while light green shading indicates the statements with the lowest interest within a specific market

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

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

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

Base IT Professionals at Enterprises (organizations > 1,000 employees): Global Enterprise = 2,342n, Australia = 92n, Canada = 147n, China = 316n, France = 151n, Germany = 154n, India = 215n, Italy = 112n, Japan = 169n, Singapore = 148n, South Korea = 94n, Spain = 101n, UAE = 168n, UK = 145n, US = 126n, LATAM = 204n
*Sample size is between 50 and 99
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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 Enterprise IT Professionals (49%).

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

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

Base IT Professionals at Enterprises (organizations > 1,000 employees) using AI for BI or to automate IT, business, or network processes: Global Enterprise = 1,148n, Canada = 62n, China = 181n, France = 52n, Germany = 76n, India = 132n, Italy = 57n, Japan = 64n, Singapore = 82n, UAE = 107n, UK = 51n, LATAM = 112n
*Sample size is between 50 and 99; **Australia, South Korea, Spain, and US sample sizes too low to show
Note: dark green shading indicates the most-chosen statements while light green shading indicates the least-chosen statements within a specific market

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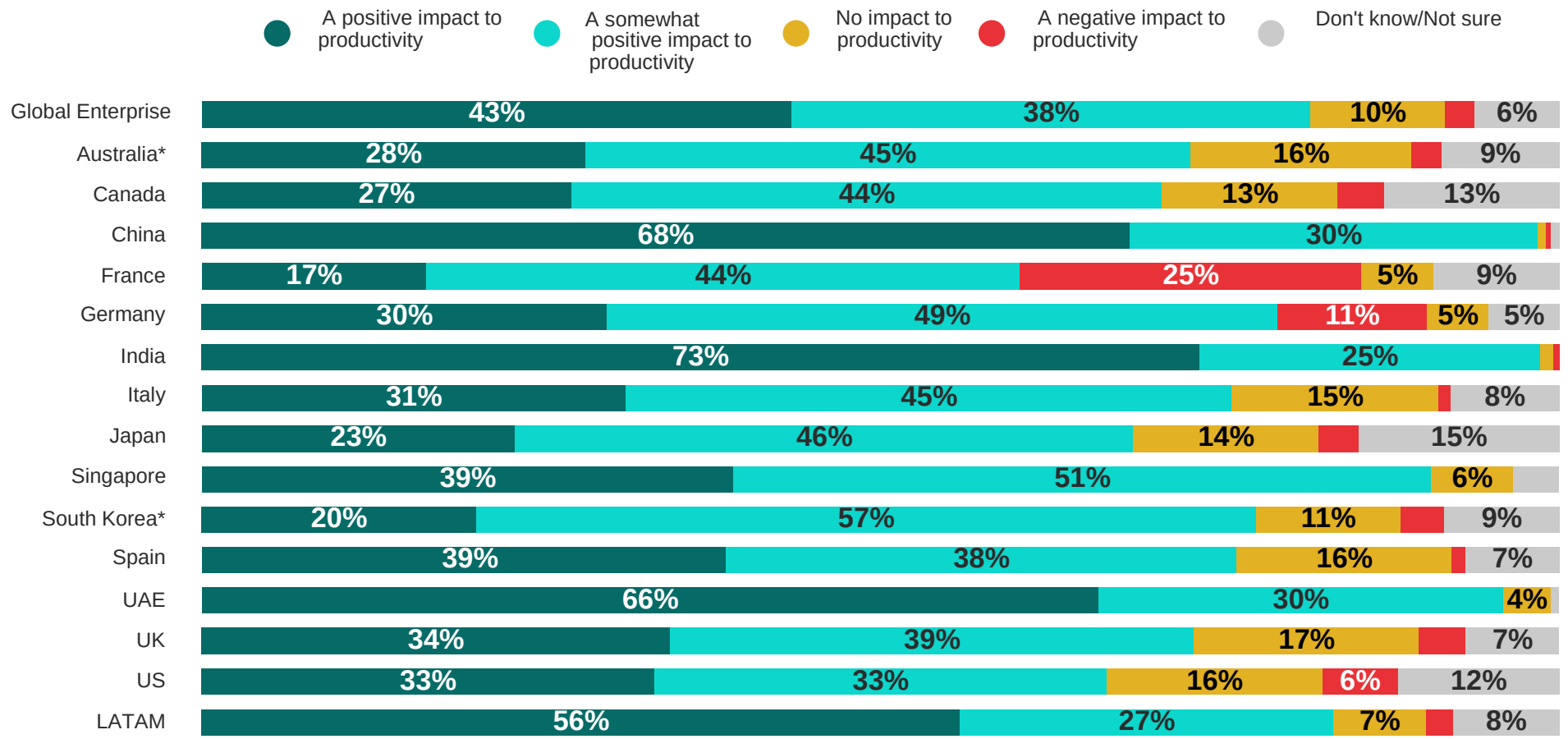
AI and automation investments have perceived positive impacts among a majority of IT Professionals at enterprises (81%).

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



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