



# ROI of AI

For IBM

Developed in collaboration with Lopez Research

— DECEMBER 2024





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## METHODOLOGY

# Methodology

This survey was fielded October 30 to November 13, 2024, among a sample of 2,413 IT Decision Makers (ITDMS) in US, Canada, Mexico, Brazil, UK, France, Germany, Spain, India, Singapore, Indonesia, and South Korea.

- ITDMs are respondents employed at companies with 101 employees or more, serving in director-level or higher roles within a technology industry/role, with decision-making authority over at least one of the following: management of business consultants/consulting services, purchasing for IT products, or purchasing for business consulting services.

The interviews were conducted online, and the data is unweighted. Global results have a margin of error of +/- 2 percentage points.

# Audience

	ITDMs	
	Sample Size	Margin of Error (MOE)
<b>All ITDMs</b>	<b>2,413</b>	<b>+/- 2%</b>
US	220	+/- 7%
Canada	215	+/- 7%
Mexico	208	+/- 7%
Brazil	230	+/- 6%
UK	219	+/- 7%
France	220	+/- 7%
Germany	216	+/- 7%
Spain	217	+/- 7%
India	224	+/- 7%
Singapore	217	+/- 7%
Indonesia	127	+/- 9%
South Korea	100	+/- 10%

## KEY FINDINGS

**Companies are betting on AI for the long term; many prioritize innovation and less than half have achieved positive ROI.**

- Over 8 in 10 ITDMs report that their company has made progress executing their AI strategy, with 43% making significant progress.
- 41% of ITDMs indicate that their company's AI investments are equally driven by ROI and innovation. Continually, metrics like faster software development, more rapid innovation, and productivity time savings are more likely to be considered critical metrics of ROI from AI investments than hard dollar savings.
- Despite progress, less than half of ITDMs say their company has achieved positive ROI from their AI investments.



**Data quality and integration are the most common obstacles for companies when implementing AI, but challenges are relatively diverse in scope.**

- Data quality and availability and integration with existing systems are the most frequent difficulties companies encounter moving through AI project lifecycles.
- ITDMs report that their companies run into a diverse range of notable challenges when implementing AI. Technology integration, lack of AI expertise, and lack of AI governance are among the most challenging.



**Moving forward, ITDMs plan to focus on solutions like cloud managed services and open-source as they increase their AI investments.**

- The majority of companies are planning to increase investment in AI and are more likely to be kicking-off a multitude of AI pilots in the new year.
- Businesses will largely be prioritizing cloud managed services, increased use of open-source, and hiring specialized talent as they look for ways to optimize their AI project lifecycles in the new year.



SECTION 1

# Current Landscape of AI: ROI – Drivers, Measurements, & Achievements

## CURRENT LANDSCAPE OF AI: ROI – DRIVERS, MEASUREMENTS, & ACHIEVEMENTS

# AI Strategy is advancing at full speed globally – 85% of ITDMs report that their company has made progress in executing their AI strategy

**Progress of AI Strategy**  
Among all ITDMs, Showing % Selected



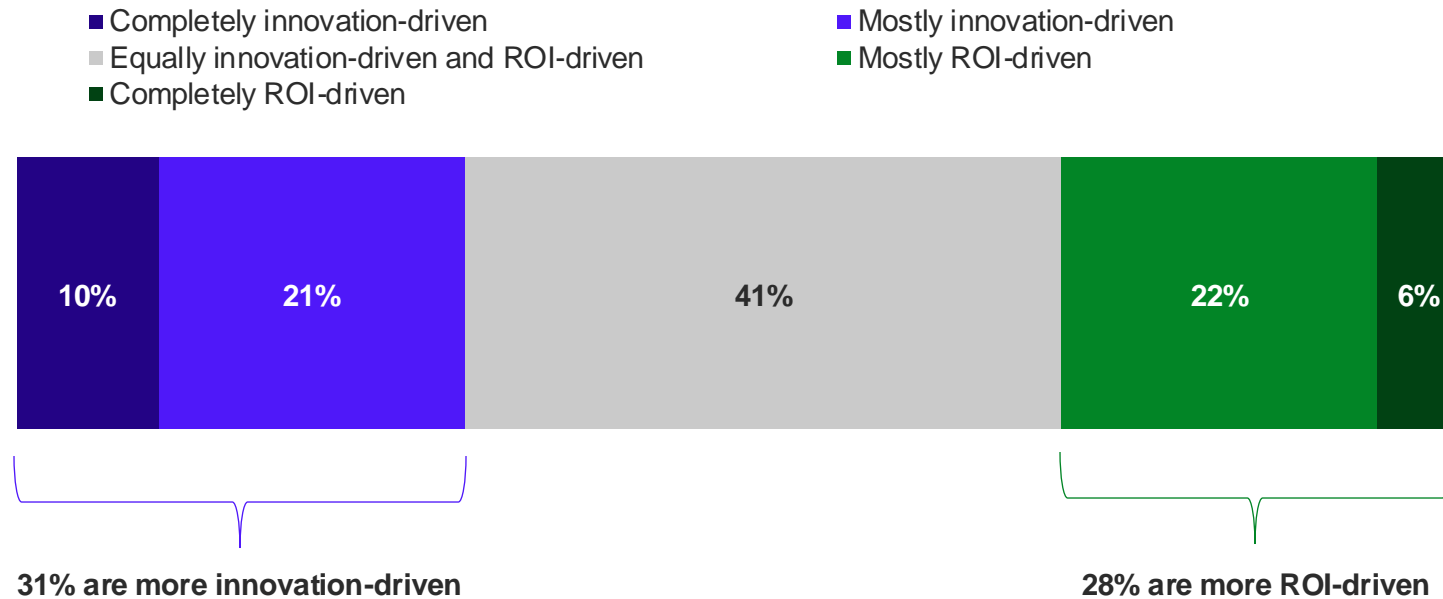
### Data Deep Dive

- Companies in India and Brazil are making notable progress in their AI strategy, with the majority of ITDMs reporting that their company has made significant progress in execution (Brazil = 61%, India = 87%).
- Companies with over 1,000 employees are making larger strides in their AI strategy than smaller organizations (101-1,000 employees = 37% significant progress, 1,001-5,000 employees = 51% significant progress, >5,000 employees = 49% significant progress).

## CURRENT LANDSCAPE OF AI: ROI – DRIVERS, MEASUREMENTS, & ACHIEVEMENTS

ROI is not necessarily the primary driver of AI investments at organizations globally – 41% of ITDMs say their organization is equally innovation-driven and ROI-driven

**Motivations Driving AI Implementation**  
*Among all ITDMs*



### Data Deep Dive

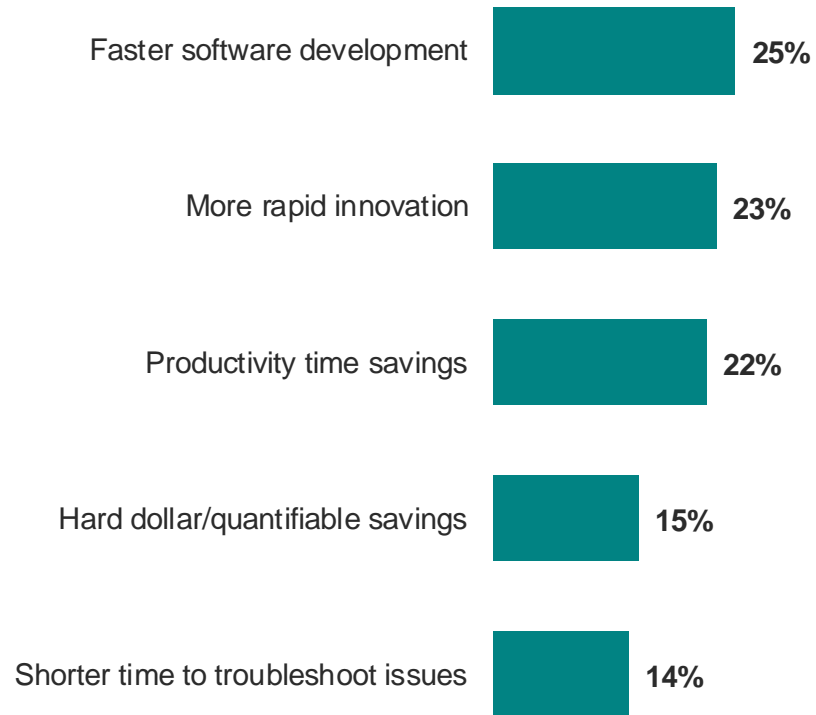
- Companies in Brazil and Singapore are more likely to be innovation-driven when it comes to implementing AI (Brazil = 41% innovation-driven vs. 24% ROI-driven, Singapore 44% innovation-driven vs. 31% ROI-driven).

## CURRENT LANDSCAPE OF AI: ROI – DRIVERS, MEASUREMENTS, & ACHIEVEMENTS

AI drives value within organizations in different ways based on their values; Companies are more likely to value productivity and efficiency ROI measurements over hard dollar savings

### Most Important Metric When Calculating ROI from AI Investments

Among all ITDMs, Showing % Selected



### Data Deep Dive

- **Open-Source Insight:** Faster innovation is a more critical metric at organizations utilizing open-source for AI tooling (26% vs. 19% at companies not using open-source).
- Organizations in South Korea are significantly more likely to consider shorter time to troubleshoot issues the most important ROI metric (27%). This metric ties with productivity time savings (27%) as the topmost critical measurement of ROI from AI in this market.
- Around a third of ITDMs in India (32%) and Indonesia (34%) report that faster innovation is the most important ROI of AI metric at their company.

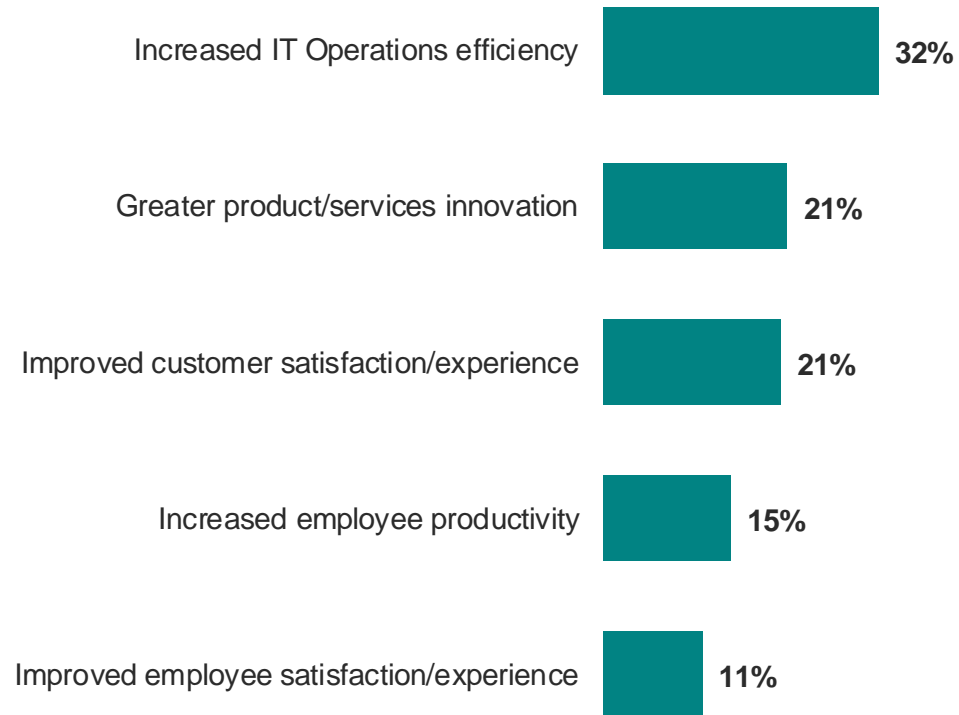


## CURRENT LANDSCAPE OF AI: ROI – DRIVERS, MEASUREMENTS, & ACHIEVEMENTS

# Increased IT operations efficiency emerges as the most important indicator of a successful AI strategy

### Most Important Indicators of a Successful AI Strategy

Among all ITDMs, Showing % Selected



### Data Deep Dive

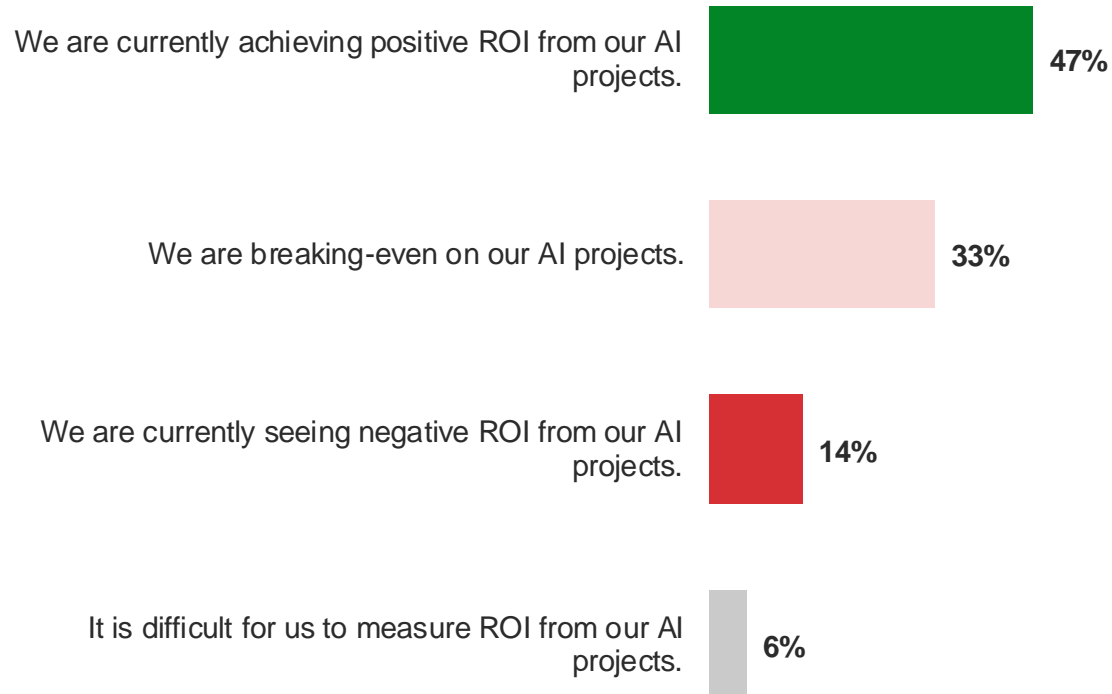
- **Open-Source Insight:** Companies utilizing open-source (23%) place more value on greater product innovation as an indicator of a successful AI strategy than those not using open-source (18%).

## CURRENT LANDSCAPE OF AI: ROI – DRIVERS, MEASUREMENTS, & ACHIEVEMENTS

# Less than half of ITDMs are seeing positive ROI from their AI investments

### ROI From 2024 AI Investments

Among all ITDMs, Showing % Selected



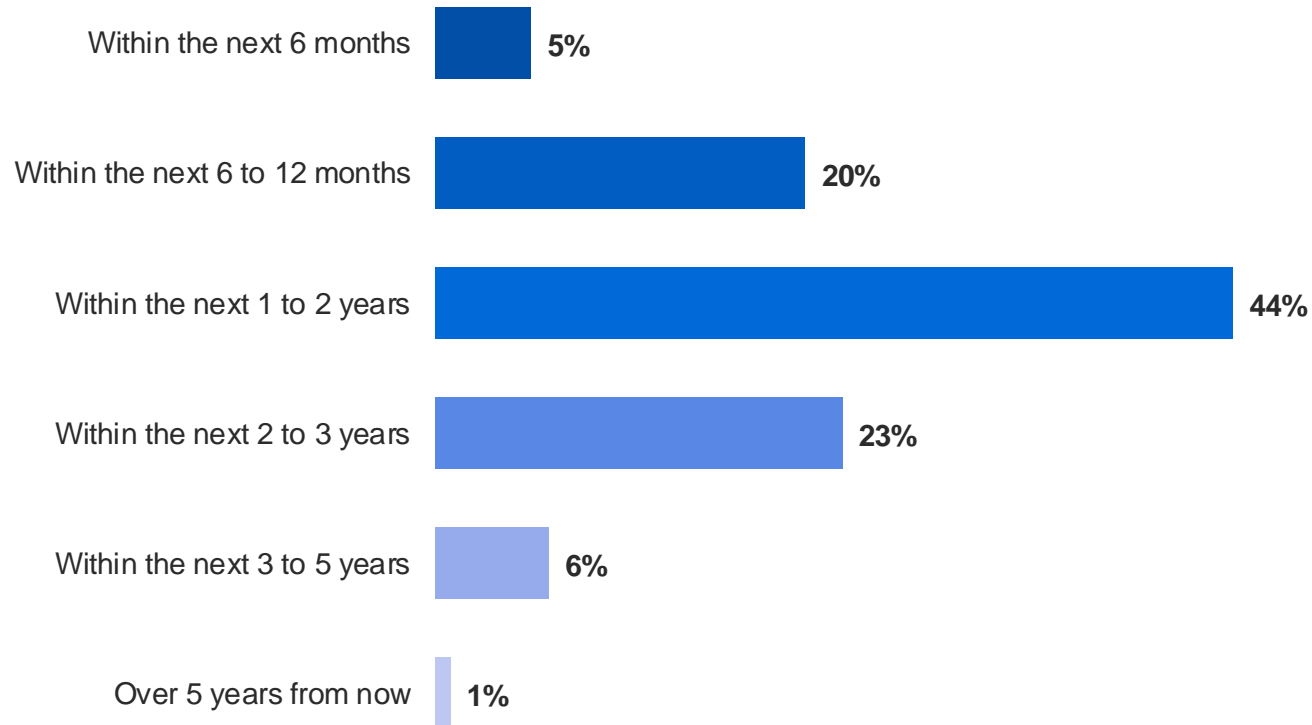
### Data Deep Dive

- **Open-Source Insight:** Companies utilizing open-source ecosystems are achieving positive ROI at greater rates than those that are not. 51% of ITDMs at companies using open-source for their AI tools report that they are seeing positive ROI compared to 41% of those at companies not utilizing open-source.
- France is the least likely market to be seeing positive ROI from AI investments, with only 29% of ITDMs in France reporting their company has achieved positive ROI.

## CURRENT LANDSCAPE OF AI: ROI – DRIVERS, MEASUREMENTS, & ACHIEVEMENTS

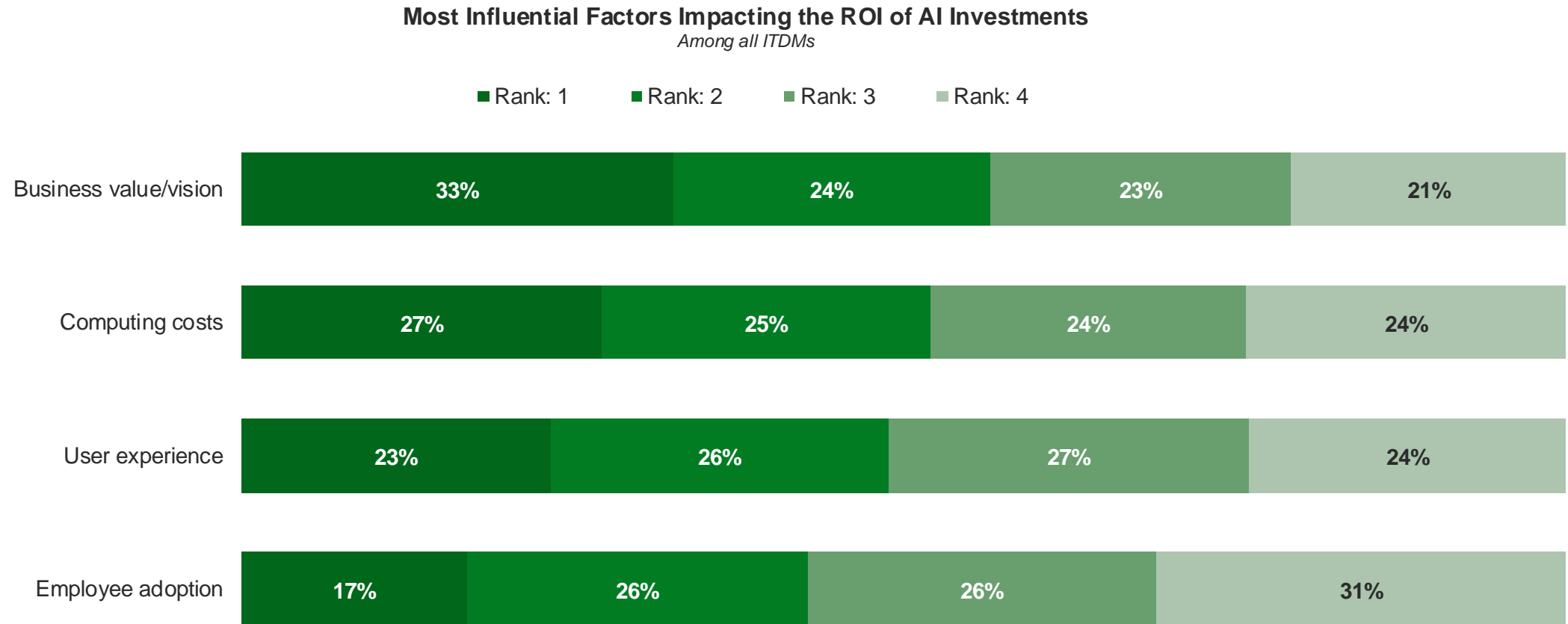
**Among ITDMs at companies not currently achieving positive ROI from AI, only about 1 in 4 expect to see positive ROI in the next year**

**Expected Timeline for Achieving Positive ROI**  
*Among all ITDMs at Companies Not Currently Seeing Positive ROI, Showing % Selected*



## CURRENT LANDSCAPE OF AI: ROI – DRIVERS, MEASUREMENTS, & ACHIEVEMENTS

# ITDMs are most likely to consider business value/vision the most impactful factor influencing the ROI of AI at their company



SECTION 1

# Current Landscape of AI: AI Implementation

## CURRENT LANDSCAPE OF AI: AI IMPLEMENTATION

Open-source ecosystems are crucial to AI strategy, with 6-in-10 ITDMs reporting that their company is using open-source ecosystems to source their AI tools

**Source of AI Tools**  
Among all ITDMs, Showing % Selected



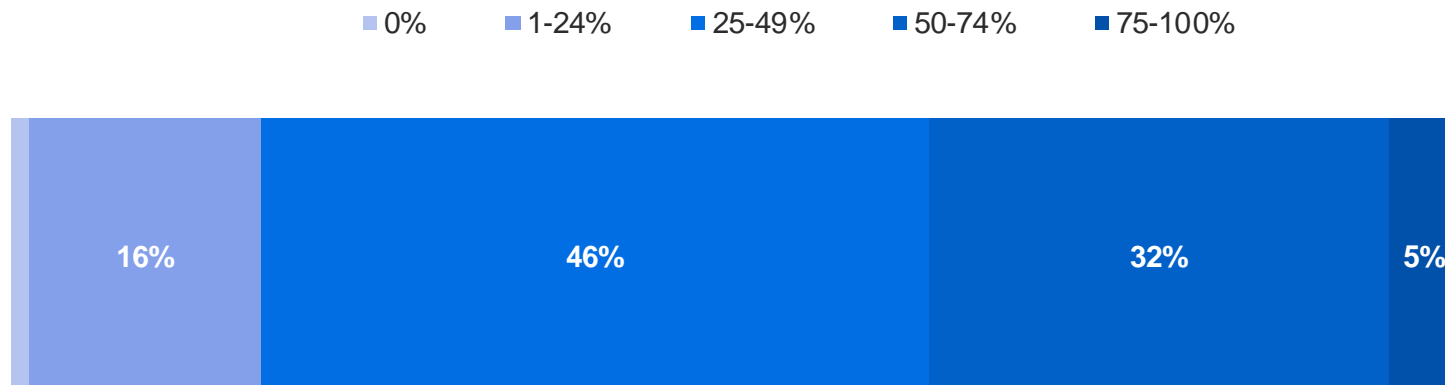
### Data Deep Dive

- Open-source is especially popular in Mexico (65%), Spain (66%), Indonesia (73%), South Korea (75%), and India (89%), where two-thirds or more indicate that their company is sourcing their AI tools via open-source ecosystems.

## CURRENT LANDSCAPE OF AI: AI IMPLEMENTATION

Over 80% of ITDMs report that at least a quarter of their company's AI solutions or platforms are based on open-source

Percentage of AI Solutions Based on Open-Source  
Among all ITDMs



### Data Deep Dive

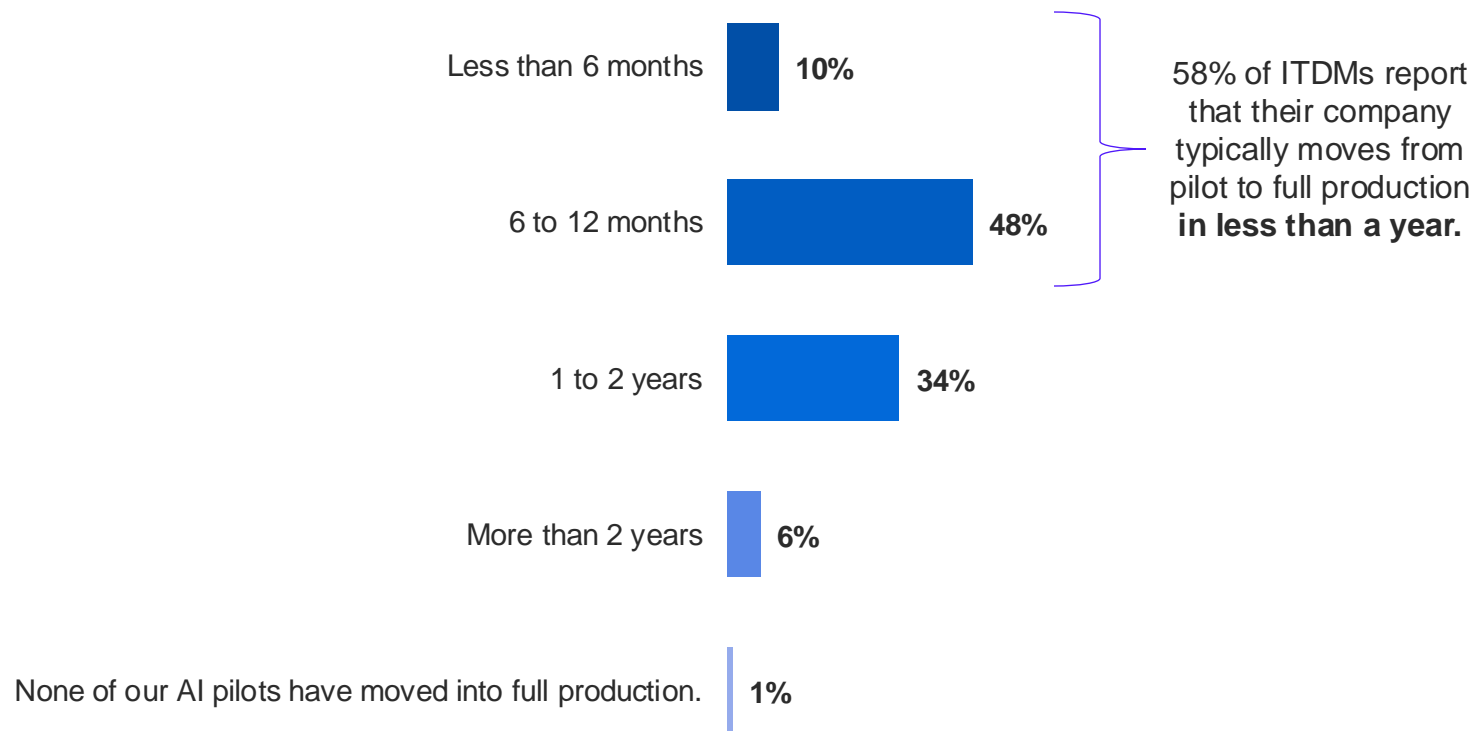
- A significant proportion (over 50%) of AI solutions at companies in Brazil (44%), India (48%), Mexico (50%), and Indonesia (56%) are based on open-source.
- As company size increases, so does the likelihood that the majority (over 50%) of AI solutions are based on open-source (101-1,000 employees = 31%, 1,001-5,000 employees = 42%, >5,000 employees = 49%).

## CURRENT LANDSCAPE OF AI: AI IMPLEMENTATION

**Most organizations are rapidly moving from AI pilots to full production, suggesting a need for processes that enable efficient project scaling**

### Average Length of Time to Transition From Pilot to Full Production

*Among all ITDMs, Showing % Selected*



### Data Deep Dive

- 1 in 5 ITDMs at companies with over 5,000 employees say their company typically transitions from pilot to full production in less than 6 months, compared to only about 10% of those at smaller businesses (101-1,000 employees = 8%, 1,001-5,000 employees = 9%).

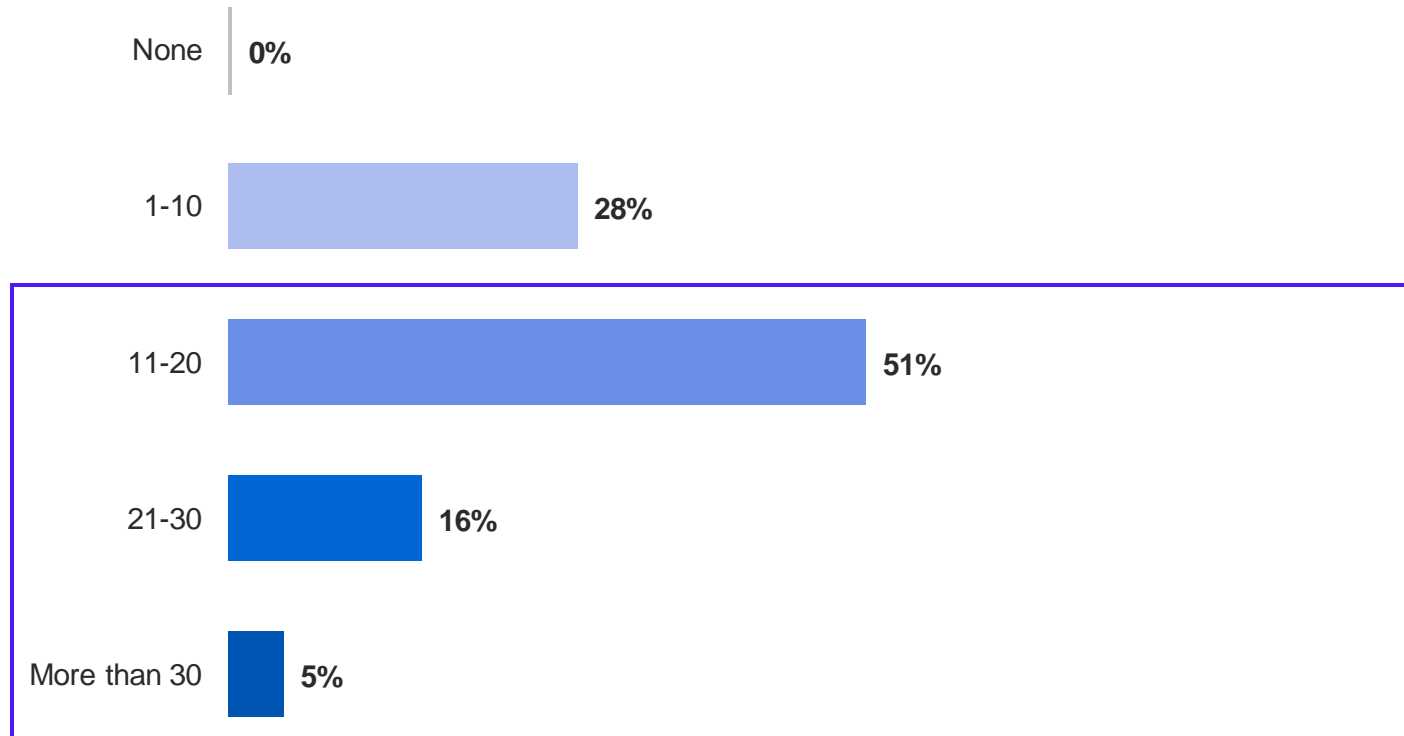


## CURRENT LANDSCAPE OF AI: AI IMPLEMENTATION

# By the end of 2024, 71% of companies will have started more than 10 AI pilots

### Number of AI Pilots Started in 2024

Among all ITDMs, Showing % Selected



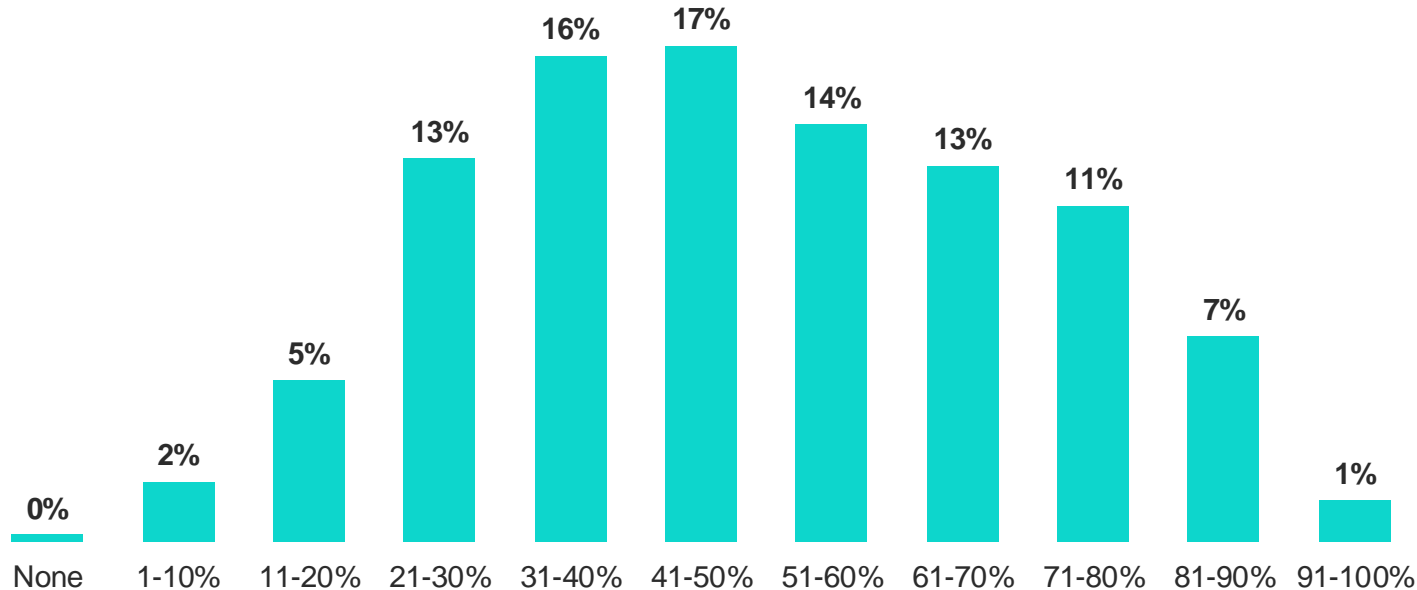
### Data Deep Dive

- A third or more of ITDMs in Brazil (33%), Indonesia (35%), and India (45%) will have started 21+ AI pilots in 2024.
- Large enterprises are starting AI pilots at a greater rate than smaller companies (101-1,000 employees = 14% 21+ AI pilots, 1,001-5,000 employees = 28% 21+ AI pilots, >5,000 employees = 29% 21+ AI pilots).

## CURRENT LANDSCAPE OF AI: AI IMPLEMENTATION

However, over 50% of ITDMs report that half or less of the AI pilots started in 2024 will have fully launched by the end of the year

**Percentage of 2024 AI Pilots Fully Launched in 2024**  
*Among ITDMs at companies that have started AI pilots in 2024, Showing % Selected*



### Data Deep Dive

- 60% or more of ITDMs in Canada (61%), France (61%), Spain (63%), the UK (64%), South Korea (65%), Germany (67%), and Singapore (73%) say that half or less of their 2024 AI pilots will have fully launched by the end of the year.
- Smaller companies are less likely than larger firms to complete their AI pilots within 2024 (101-1,000 employees = 62% half or less, 1,001-5,000 employees = 43% half or less, >5,000 employees = 40% half or less).
- ITDMs in middle management are less optimistic regarding their 2024 project timelines than those in senior management (Middle Management = 57% half or less, Senior Management = 45% half or less).



SECTION 2

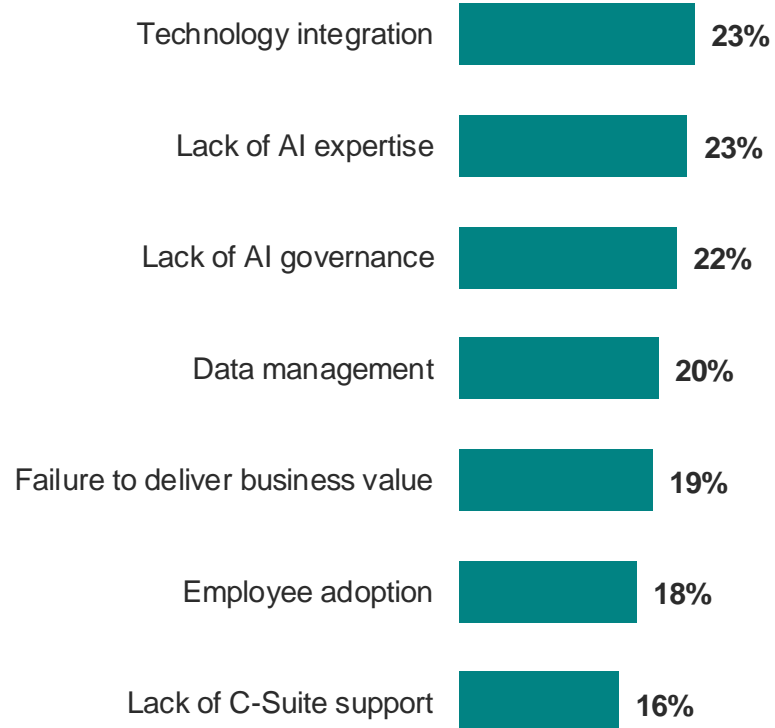
# Challenges of AI Implementation

## CHALLENGES OF AI IMPLEMENTATION

Companies face a broad range of significant challenges as they implement AI, highlighting the complexity of their operating environments

### Significant Challenges When Implementing AI

Among all ITDMs, Showing % Selected 'Very challenging'



### Data Deep Dive

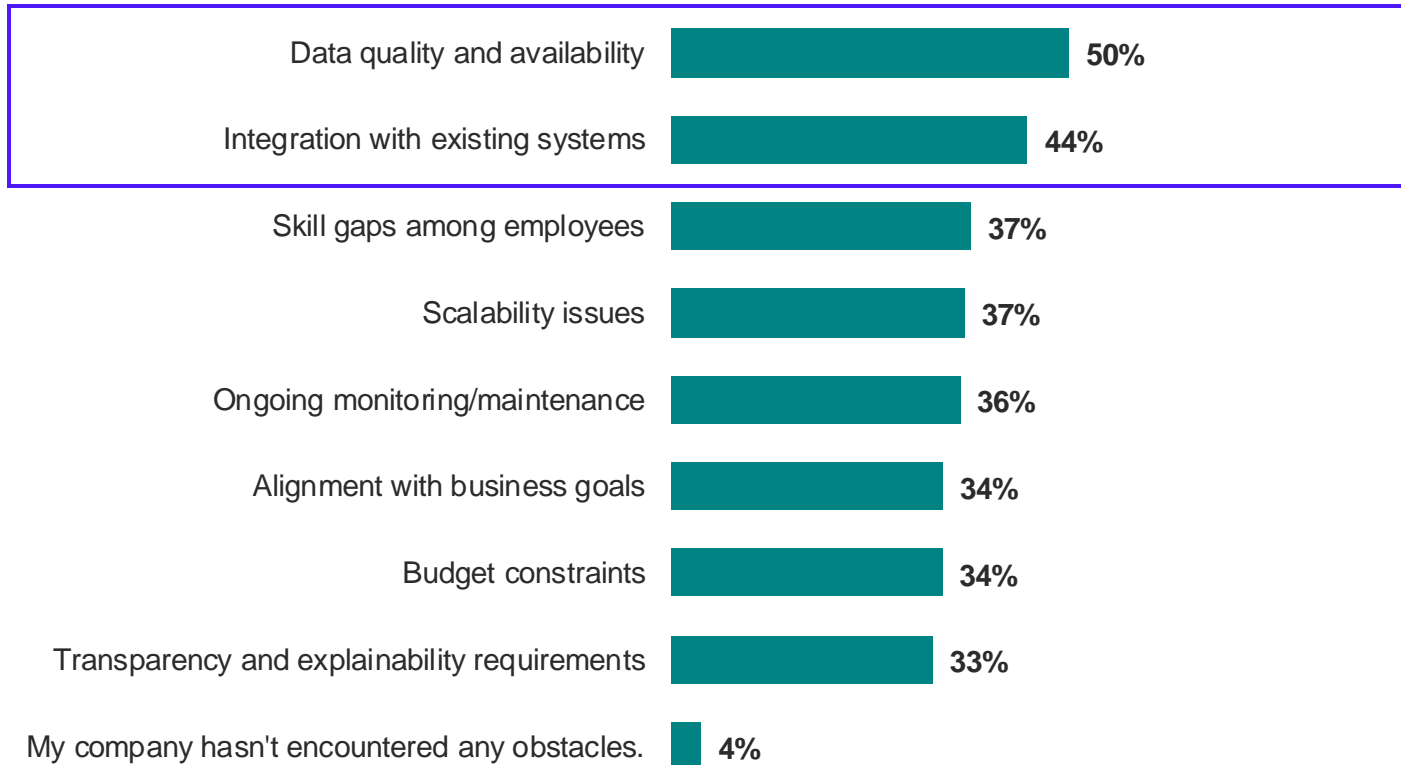
- **Open-Source Insight:** Lack of AI governance is a more significant challenge at companies using open source (Using open-source = 25%, Not using open-source = 17%).
- Employee adoption becomes a bigger obstacle as companies grow (101-1,000 employees = 16%, 1,001-5,000 employees = 19%, >5,000 employees = 21%).
- Senior management is significantly more likely to consider failure to deliver business value (22%) and lack of C-Suite support (20%) very challenging compared to middle management (Middle Management = 18% failure to deliver business value, 14% lack of C-Suite support).

## CHALLENGES OF AI IMPLEMENTATION

# Data quality and availability and integration with existing systems are the most common challenges companies face as they move AI projects from pilot to full implementation

### Obstacles Faced When Implementing AI Pilot Projects

Among ITDMs at Companies that have Launched an AI Pilot, Showing % Selected



### Data Deep Dive

- Data quality and availability is a more common issue at companies with 5,000 or fewer employees (101-1,000 employees = 51%, 1,001-5,000 employees = 51%, >5,000 employees = 44%).

SECTION 3

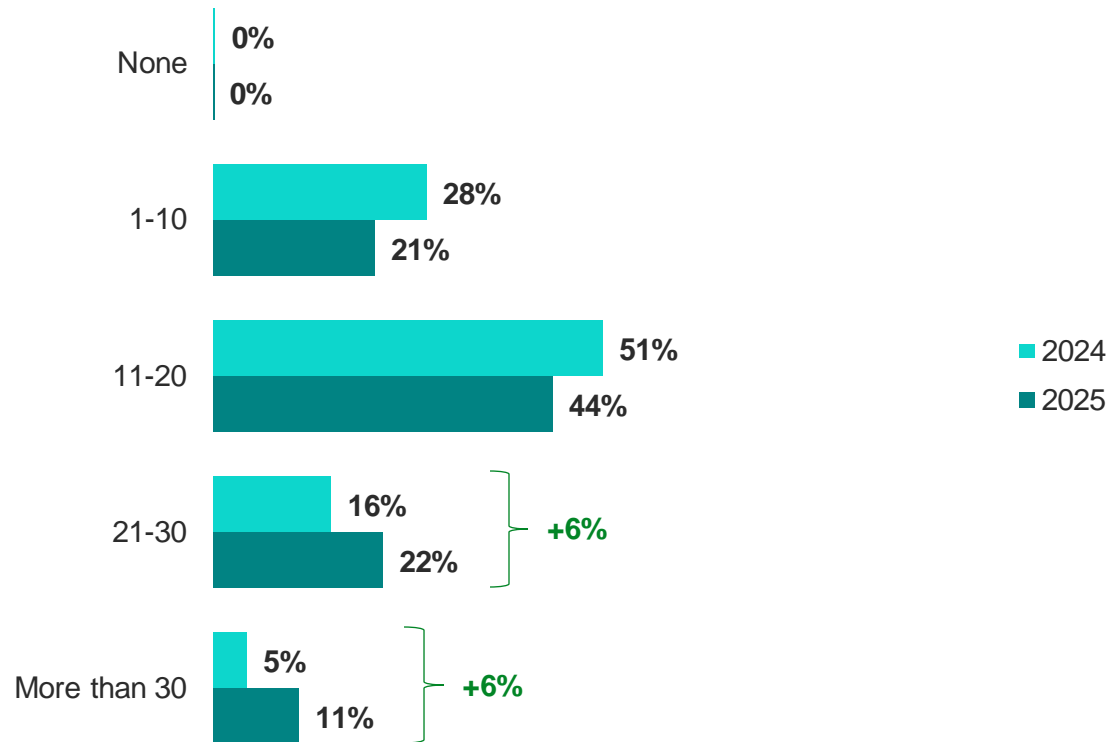
# Future of AI

## FUTURE OF AI

**ITDMs are more optimistic about the number of AI pilots their company will start in 2025; Around a third say their company has plans to start more than 20 AI pilots, compared to only around 20% in 2024**

Number of AI Pilots Planned for 2024 vs. 2025

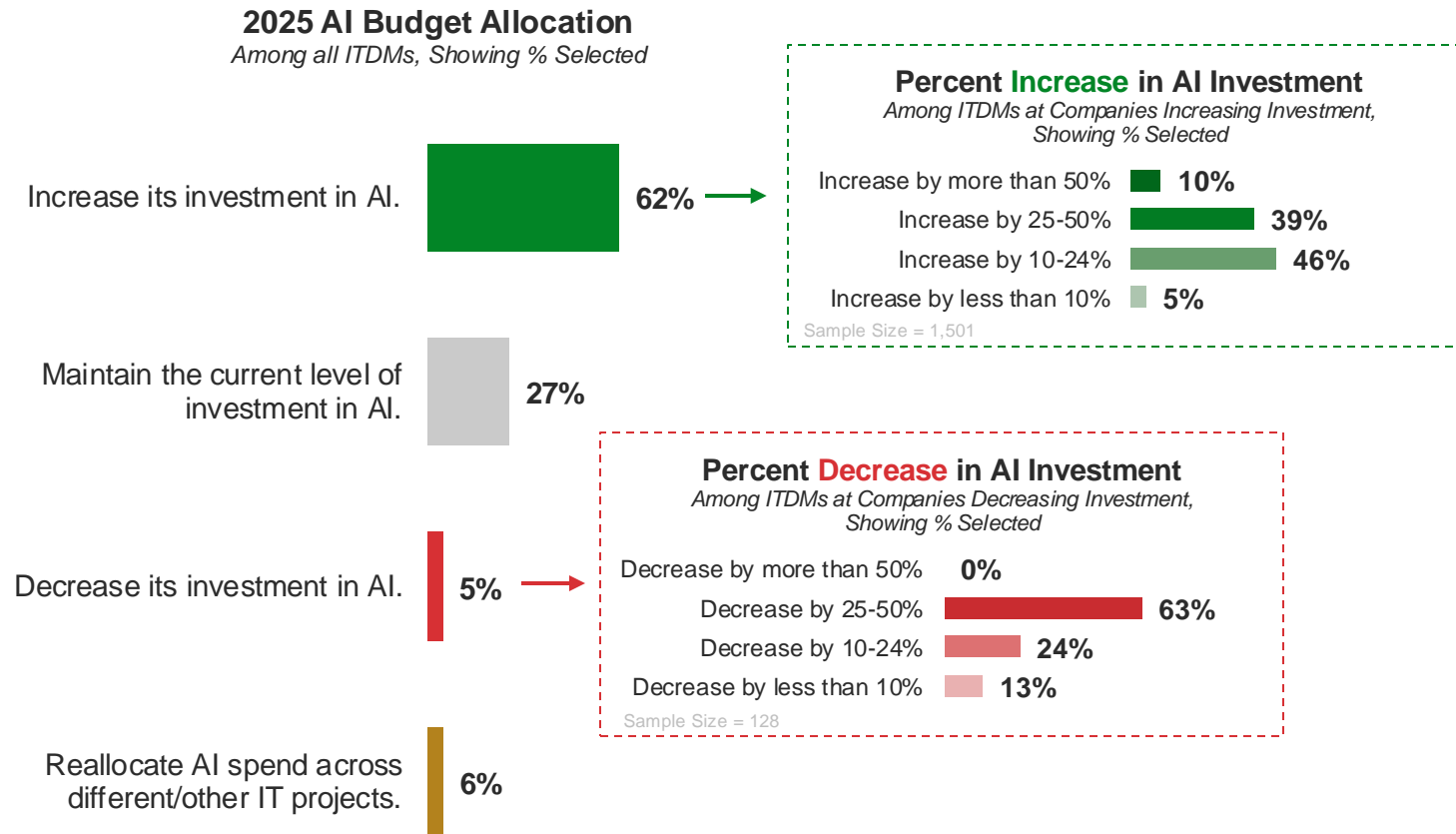
Among all ITDMs, Showing % Selected



### Data Deep Dive

- **Open-Source Insight:** 4 in 10 open-source users are planning to start more than 20 pilots in '25. 38% of ITDMs at companies using open-source for AI tooling report their company is planning to launch 21+ AI pilots in 2025, compared to 26% at companies who do not use open-source.
- Businesses in India (+20%), South Korea (+18%), Spain (+17%), Brazil (+17%), Indonesia (+17%), and Mexico (+16%) are much more likely to be launching over 20 AI pilots in 2025 compared to 2024.

# Companies are largely planning to increase their investments in AI in 2025



**Data Deep Dive**

- **Open-Source Insight:** Companies using open-source for AI tooling are even more likely to be increasing their AI investment in 2025 (Using open-source = 65%, Not using open-source = 58%).
- The majority across nearly all countries are planning to increase their investment in AI in 2025, especially in Mexico (69%), South Korea (71%), Brazil (78%), and India (93%).

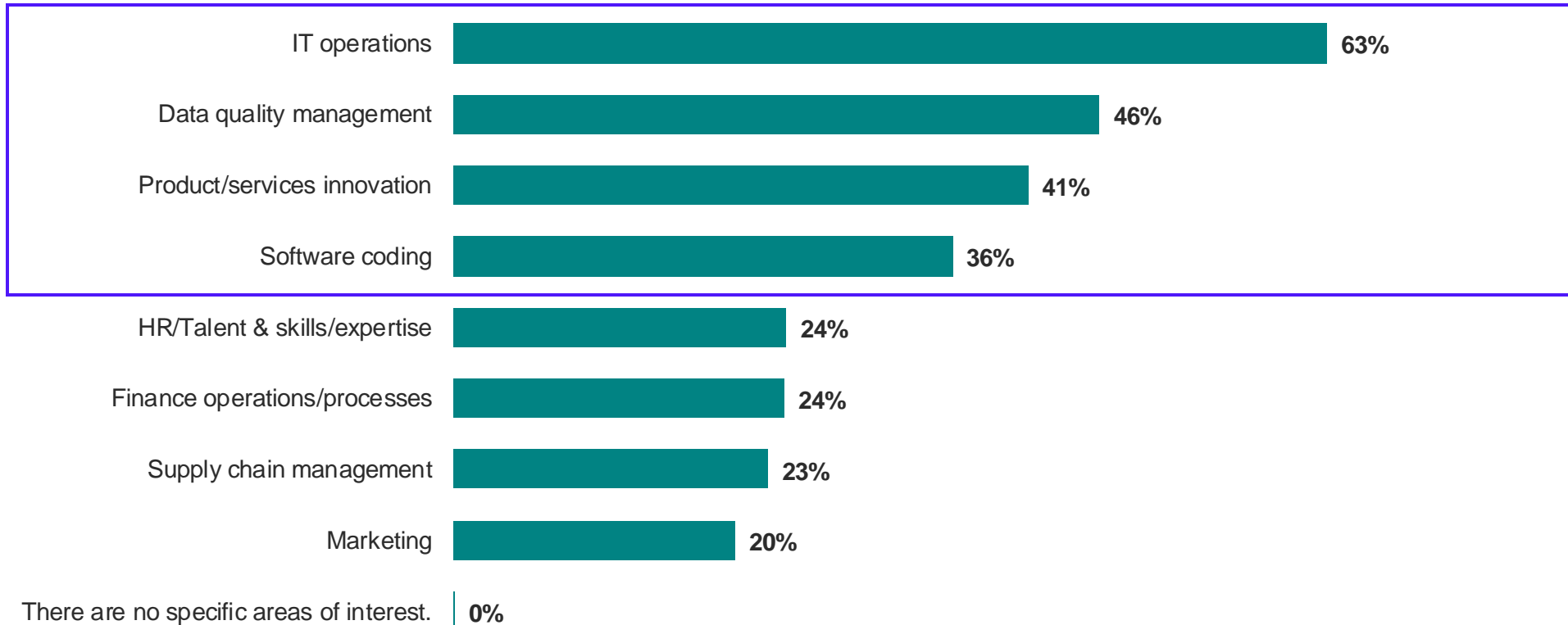


## FUTURE OF AI

Companies are most interested in allocating their AI investments in IT operations; Data quality, product innovation, and software coding are also popular areas for investment

### Top Areas for Allocating AI Investments in 2025

Among all ITDMs, Showing % Selected

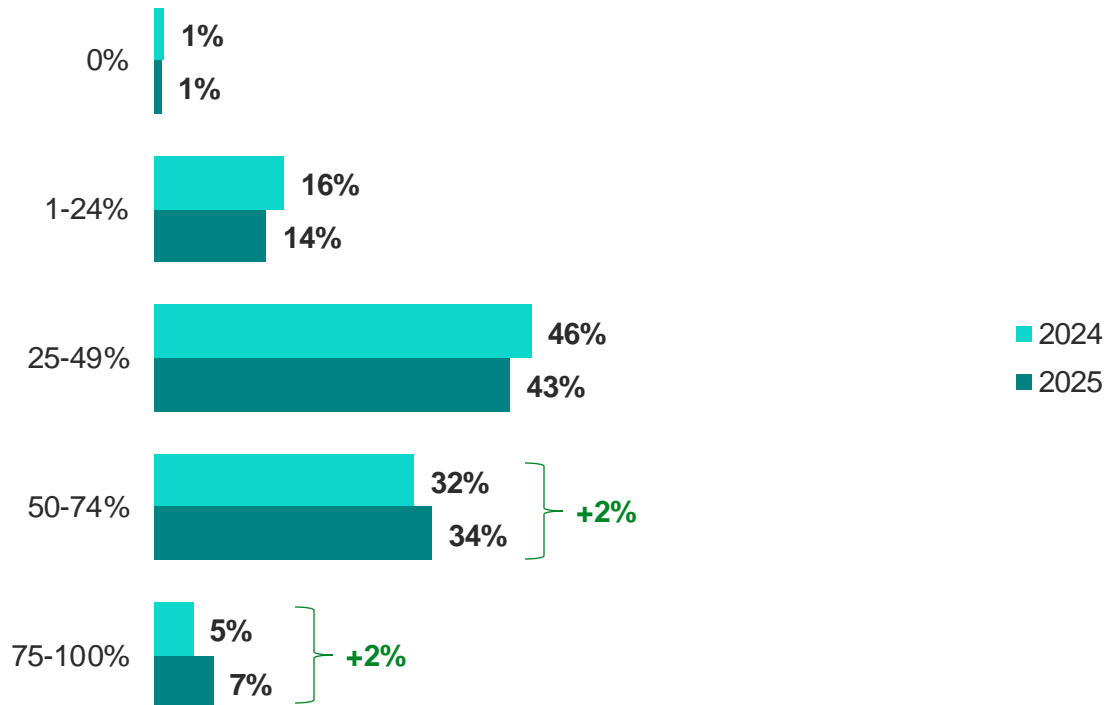


## FUTURE OF AI

# Investment in open-source solutions for AI continues into 2025; More AI solutions are expected to be based on open-source in the new year (37% 2024 vs. 41% 2025)

### Percentage of AI Solutions Based on Open-Source in 2024 vs. 2025

Among all ITDMs, Showing % Selected



### Data Deep Dive

- Over 40% of businesses that currently base less than a quarter (1-24%) of their AI solutions on open-source plan to increase this share in 2025 (42%). Additionally, around 1 in 4 of those relying on open-source for 25% to 49% of their AI solutions intend to increase this percentage to over 50% in the next year (23%).
- Indian companies are especially likely to increase the percentage of AI solutions based on open-source in 2025. 70% of ITDMs say that at least half of their AI solutions will be based on open-source in 2025, compared to just 48% who said the same for 2024.

## FUTURE OF AI

# Increasing use of open-source and utilizing cloud managed services are among the most common ways businesses plan to optimize their AI implementation in 2025

### Strategic Changes to Optimize AI Implementation Planned for 2025

Among all ITDMs, Showing % Selected



### Data Deep Dive

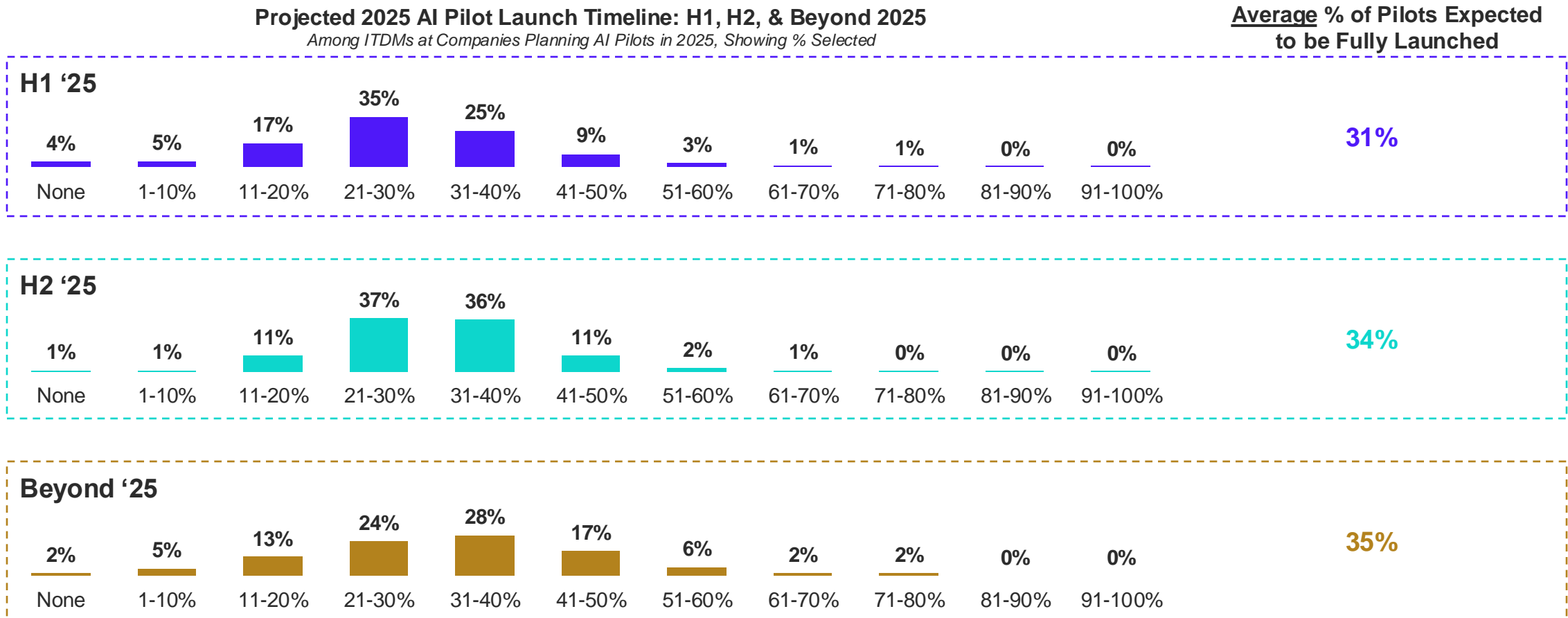
- **Open-Source Insight:** 2 in 5 non-open-source users plan to use open-source for AI implementation in 2025 (41%). Additionally, **over half of open-source users (54%) will be using cloud managed services in 2025** to help optimize AI implementation (Non-Open-Source Users = 47%).
- 71% of ITDMs in India report that their company plans to utilize more open-source in the new year to help optimize their AI implementation.
- Middle management is more likely to report their company will be using cloud managed services (53%) and more open-source (49%) and than their senior-level colleagues (Senior Management = 47% using cloud managed services, 44% using more open-source).

# Appendix



APPENDIX

# On average, ITDMs expect over 60% of their 2025 AI pilots to be fully launched by the end of the year

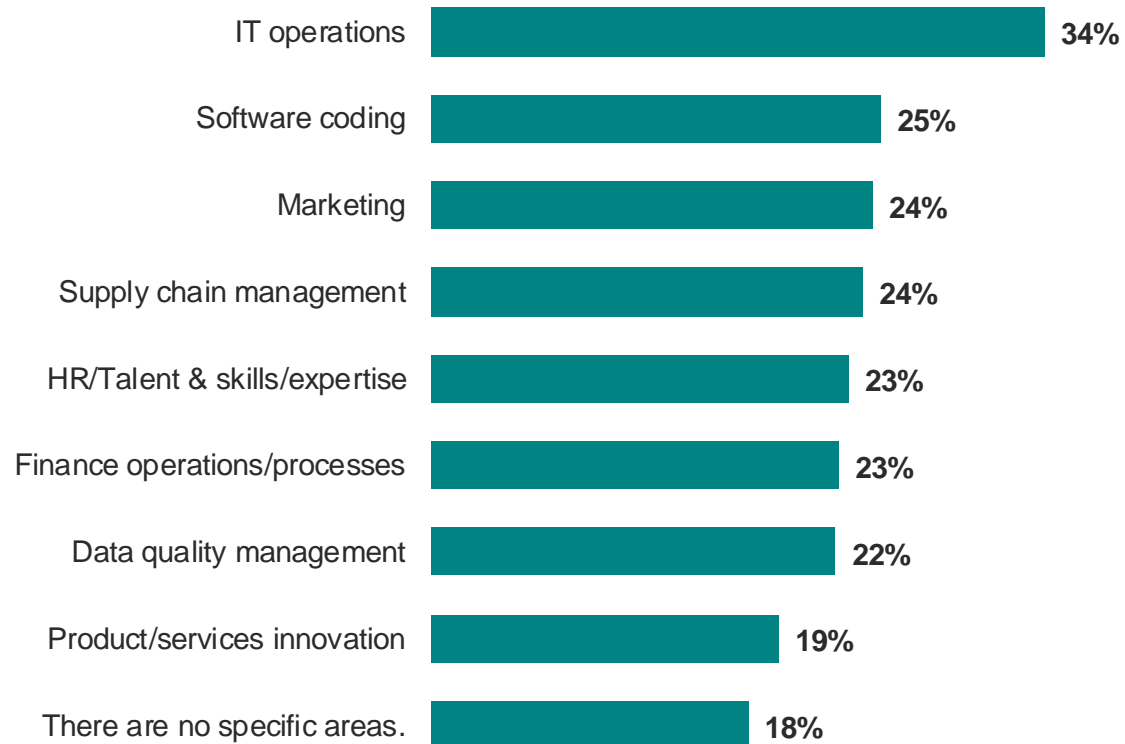


## APPENDIX

# ITDMs are split on the areas their companies are likely to consider reducing AI investments

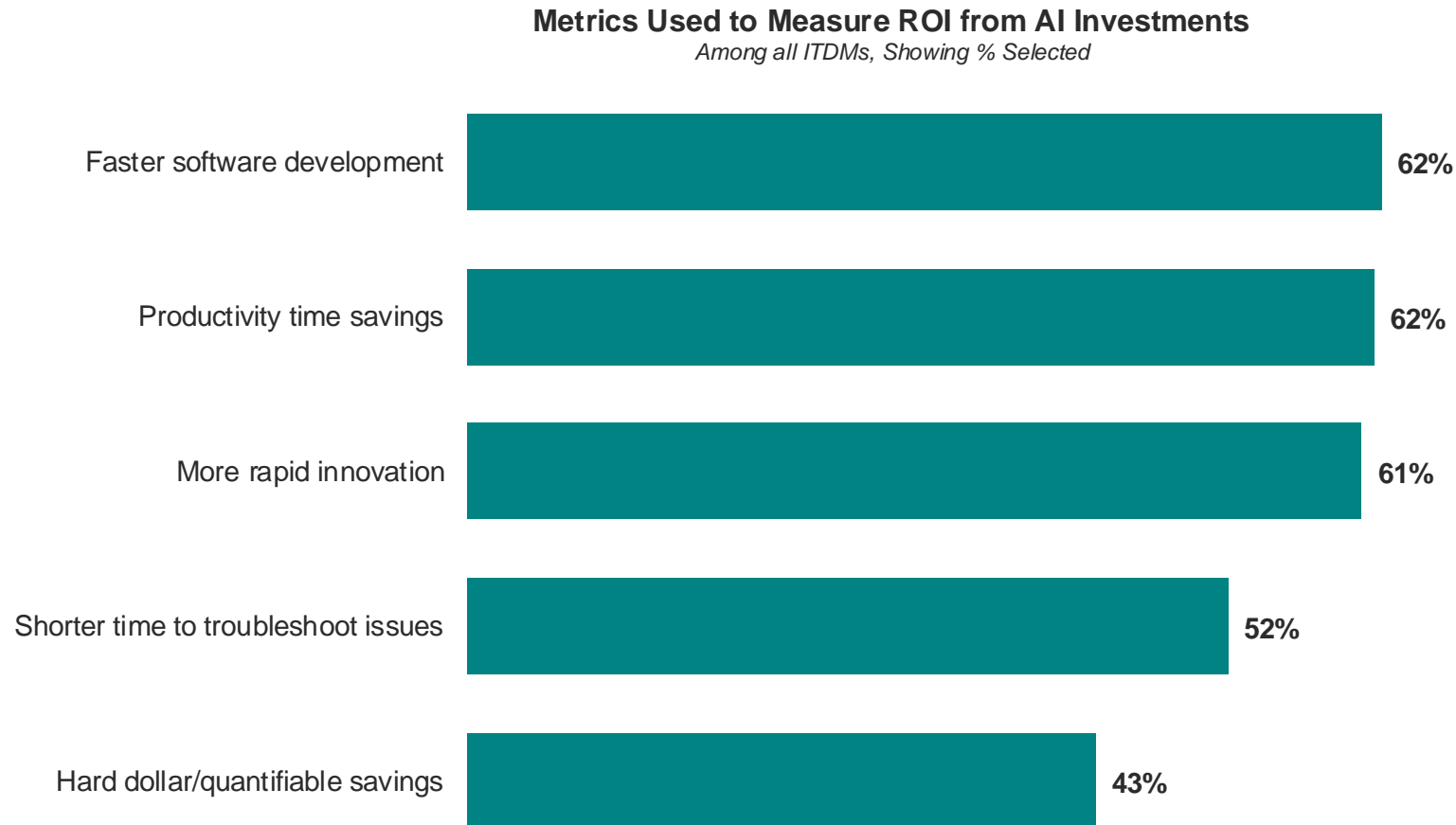
### Top Areas Likely to See AI Investments Reduced in 2025

*Among all ITDMs, Showing % Selected*



## APPENDIX

**Organizations are most likely to be using faster software development, productivity time savings, and more rapid innovation to measure ROI of AI, while calculating quantifiable savings is a lot less popular**



# Appendix: Advanced vs. Emerging AI Ecosystem Markets



## Audience Description

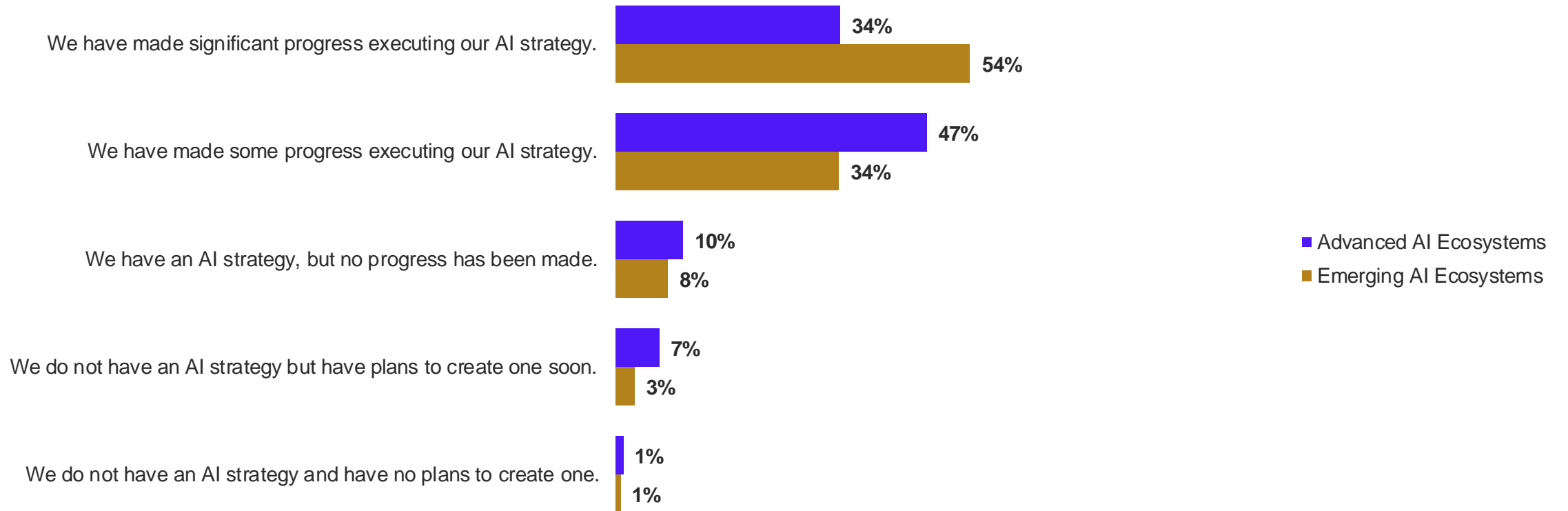
When analyzing the data, Morning Consult identified patterns in the responses from respondents of two sets of markets:

- **Group 1: Advanced AI Ecosystems:** Respondents from the US, Canada, the UK, France, Germany, Singapore, and South Korea displayed similar response patterns across multiple key questions. These markets have higher adjusted per capita income and are likely to have been working with AI for a longer time, and, therefore, are categorized as 'advanced'. The sample size of this group is 1,407 and the results have a margin of error of +/- 3 percentage points.
- **Group 2: Emerging AI Ecosystems:** Respondents from Mexico, Spain, Brazil, India, and Indonesia also had distinct response patterns. These markets are likely to be newer to AI exploration and tend to be making rapid progress in AI development. The sample size of this group is 1,006 and the results have a margin of error of +/- 3 percentage points.

## APPENDIX: ADVANCED VS. EMERGING AI ECOSYSTEM MARKETS

### Progress of AI Strategy

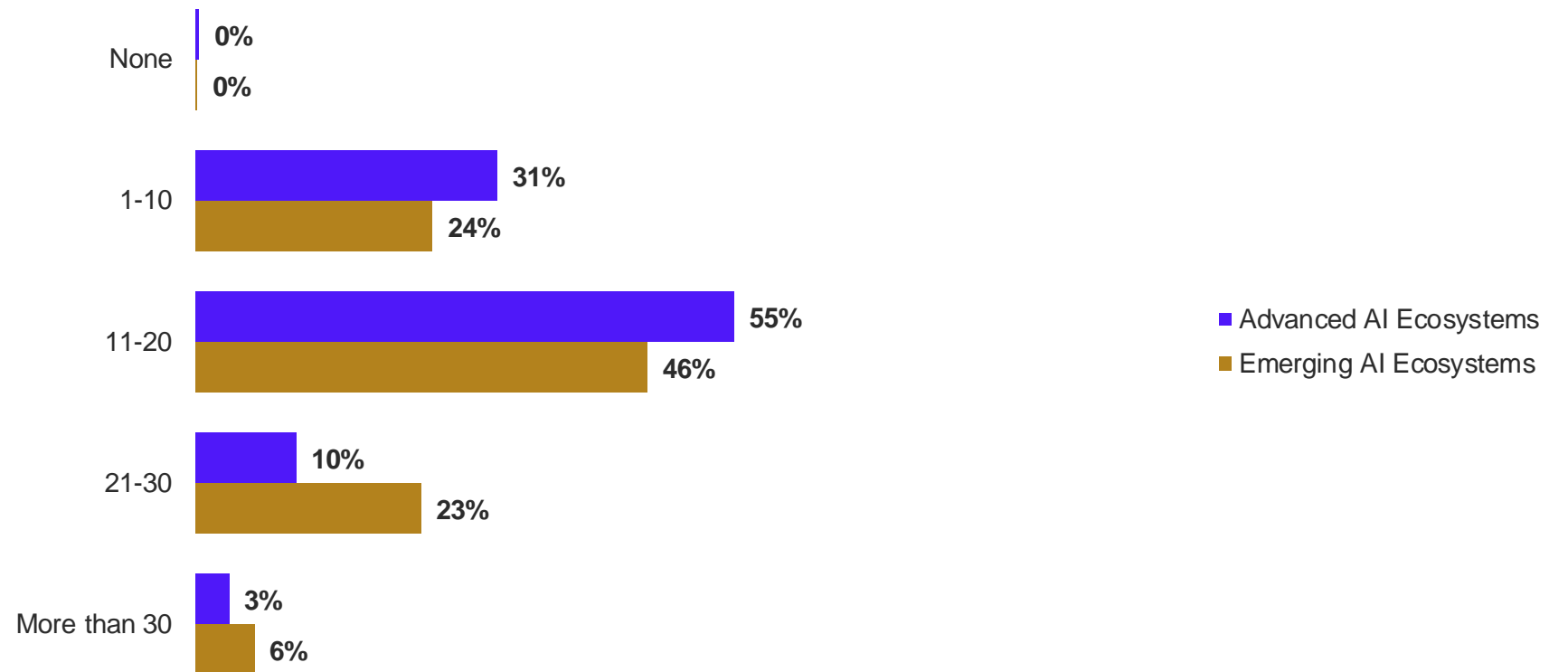
Among ITDMs in Advanced vs. Emerging AI Ecosystem Markets, Showing % Selected



## APPENDIX: ADVANCED VS. EMERGING AI ECOSYSTEM MARKETS

### Number of AI Pilots Started in 2024

Among ITDMs in Advanced vs. Emerging AI Ecosystem Markets, Showing % Selected

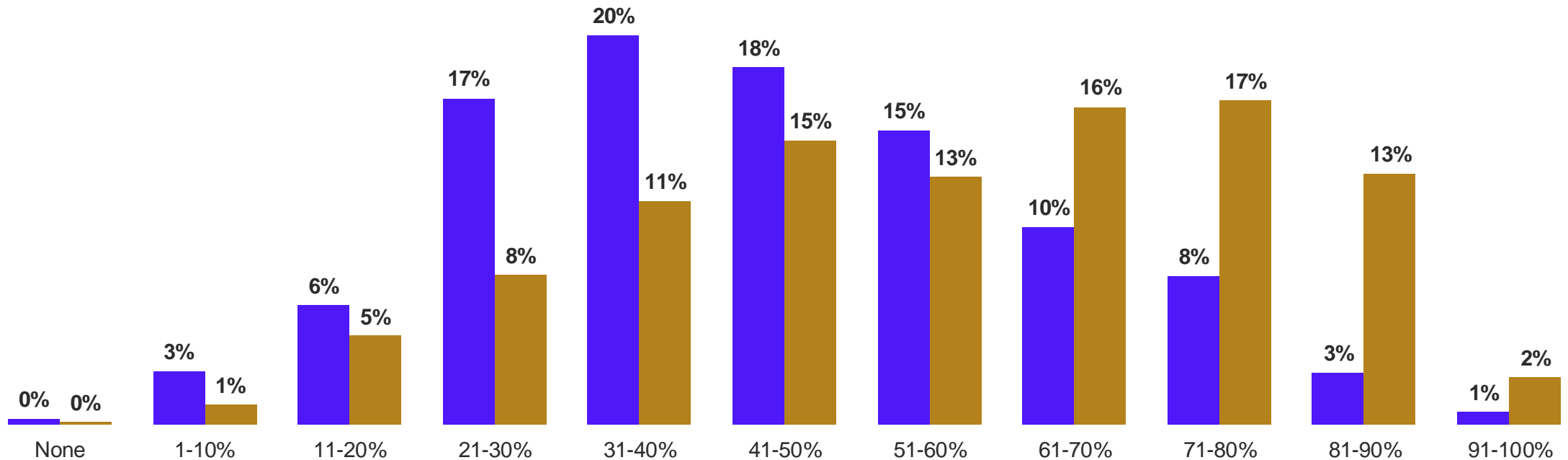


## APPENDIX: ADVANCED VS. EMERGING AI ECOSYSTEM MARKETS

### Percentage of 2024 AI Pilots Fully Launched in 2024

Among ITDMs at Companies that have started AI Pilots in 2024 in Advanced vs. Emerging AI Ecosystem Markets, Showing % Selected

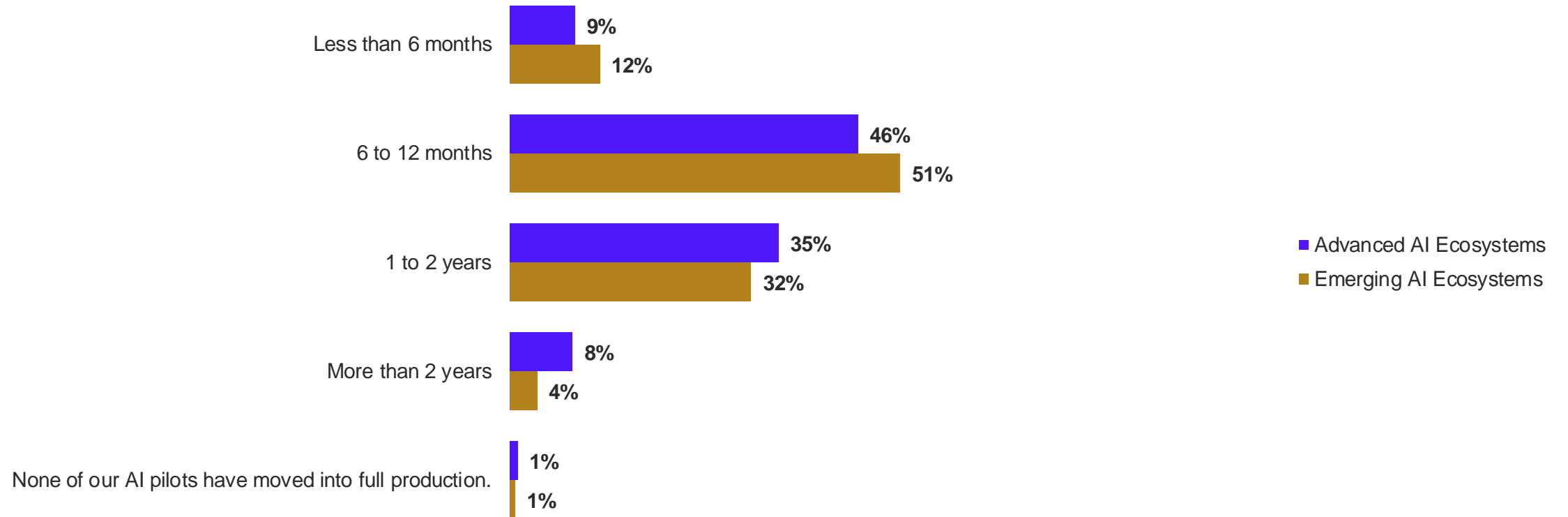
■ Advanced AI Ecosystems ■ Emerging AI Ecosystems



## APPENDIX: ADVANCED VS. EMERGING AI ECOSYSTEM MARKETS

### Average Length of Time to Transition From Pilot to Full Production

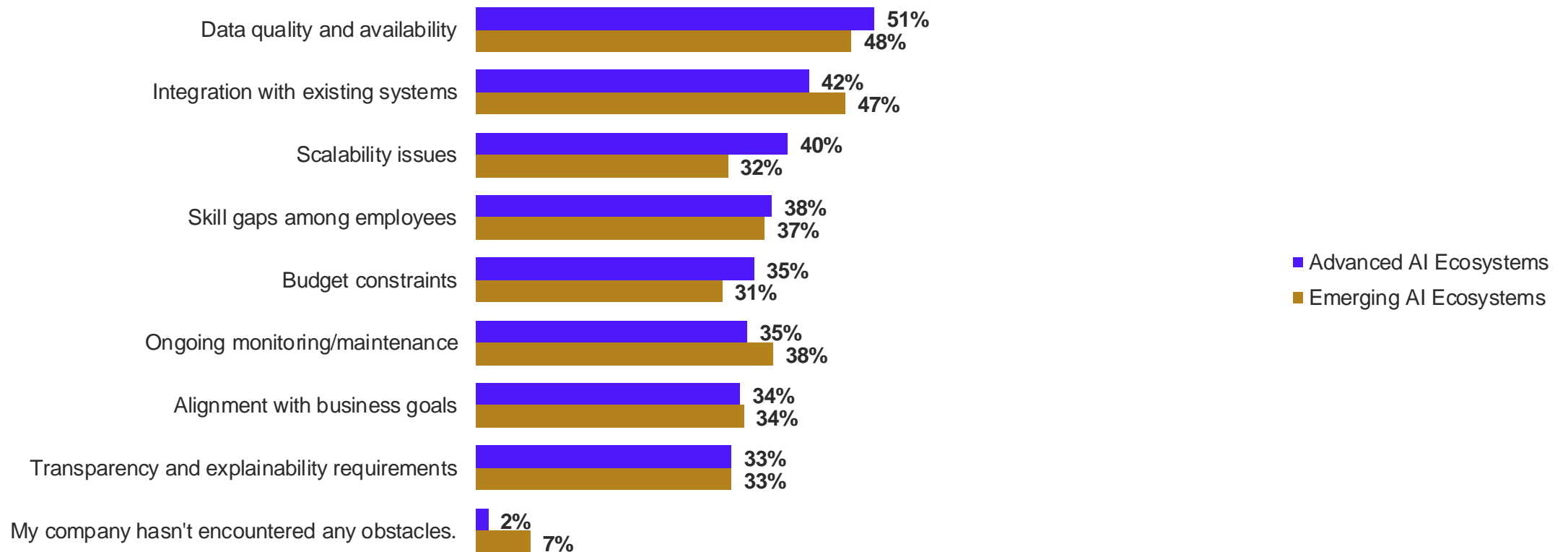
Among ITDMs in Advanced vs. Emerging AI Ecosystem Markets, Showing % Selected



## APPENDIX: ADVANCED VS. EMERGING AI ECOSYSTEM MARKETS

### Obstacles Faced When Implementing AI Pilot Projects

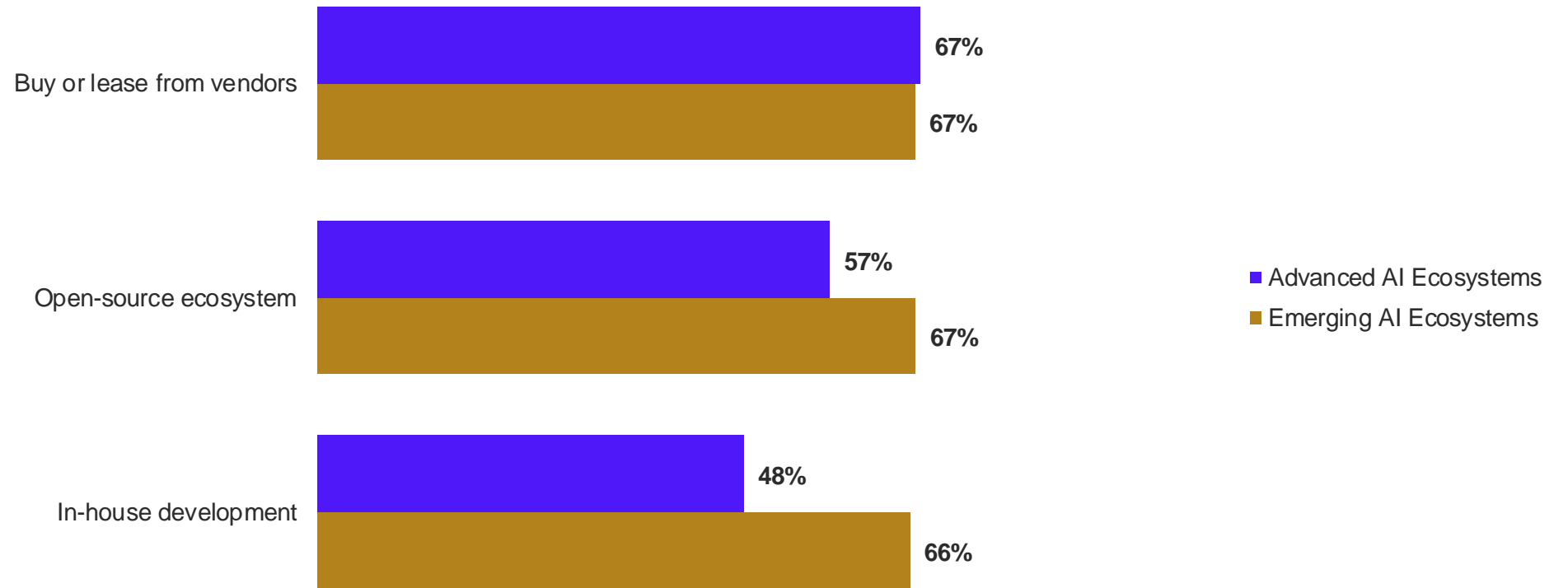
Among ITDMs at Companies that have Launched an AI Pilot in Advanced vs. Emerging AI Ecosystem Markets, Showing % Selected



## APPENDIX: ADVANCED VS. EMERGING AI ECOSYSTEM MARKETS

### Source of AI Tools

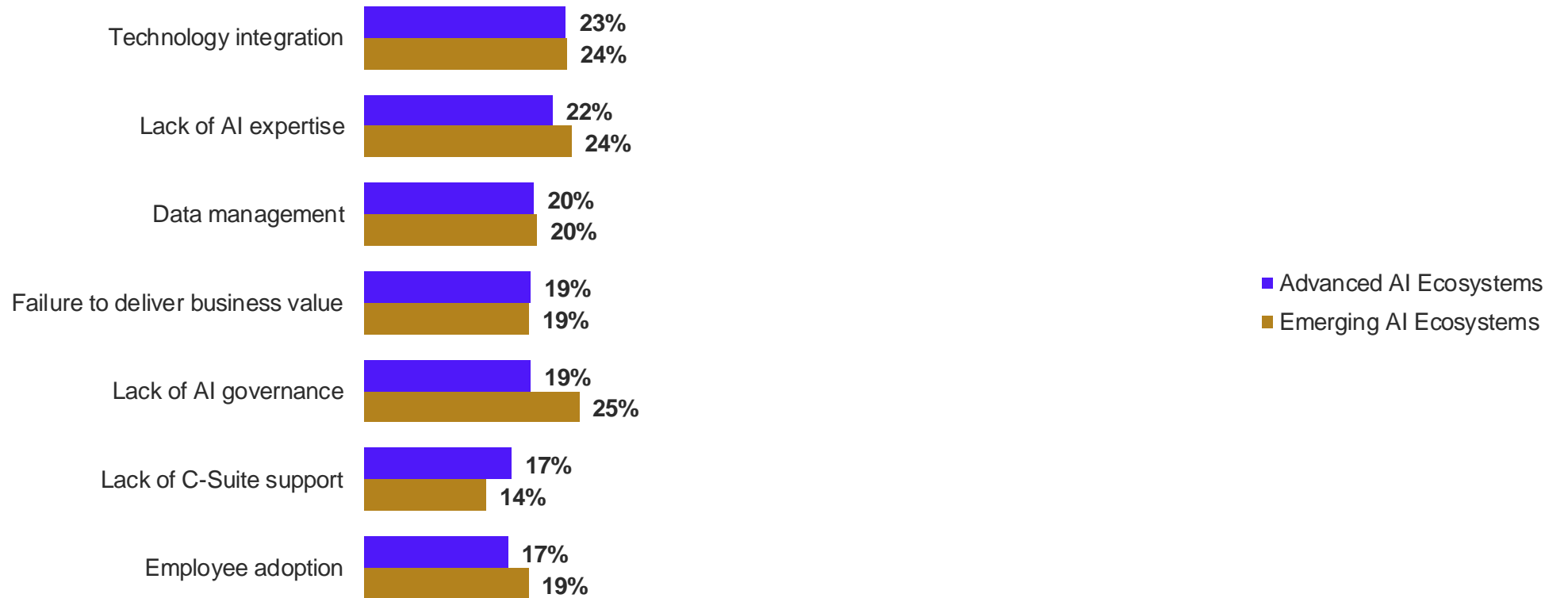
Among ITDMs in Advanced vs. Emerging AI Ecosystem Markets, Showing % Selected



## APPENDIX: ADVANCED VS. EMERGING AI ECOSYSTEM MARKETS

### Significant Challenges When Implementing AI

Among ITDMs in Advanced vs. Emerging AI Ecosystem Markets, Showing % Selected 'Very challenging'

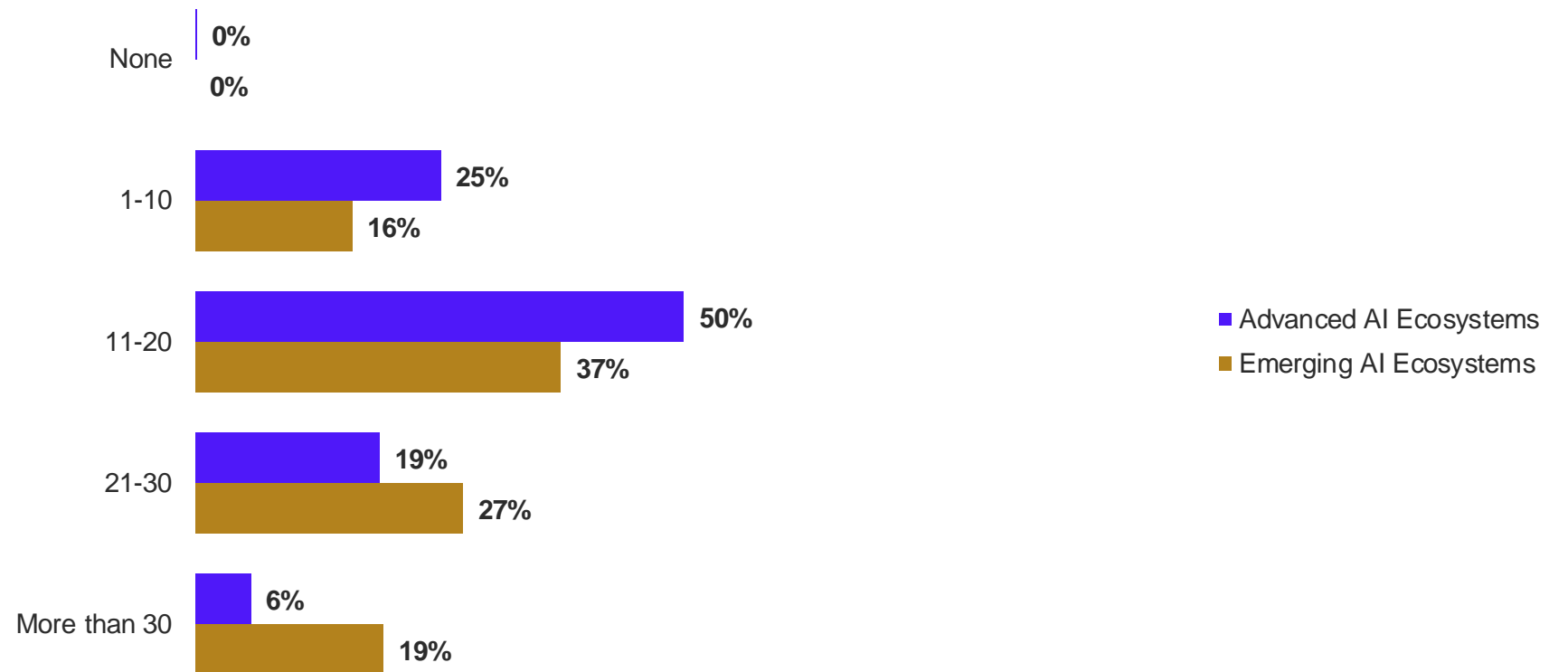




## APPENDIX: ADVANCED VS. EMERGING AI ECOSYSTEM MARKETS

### Number of AI Pilots Planned for 2025

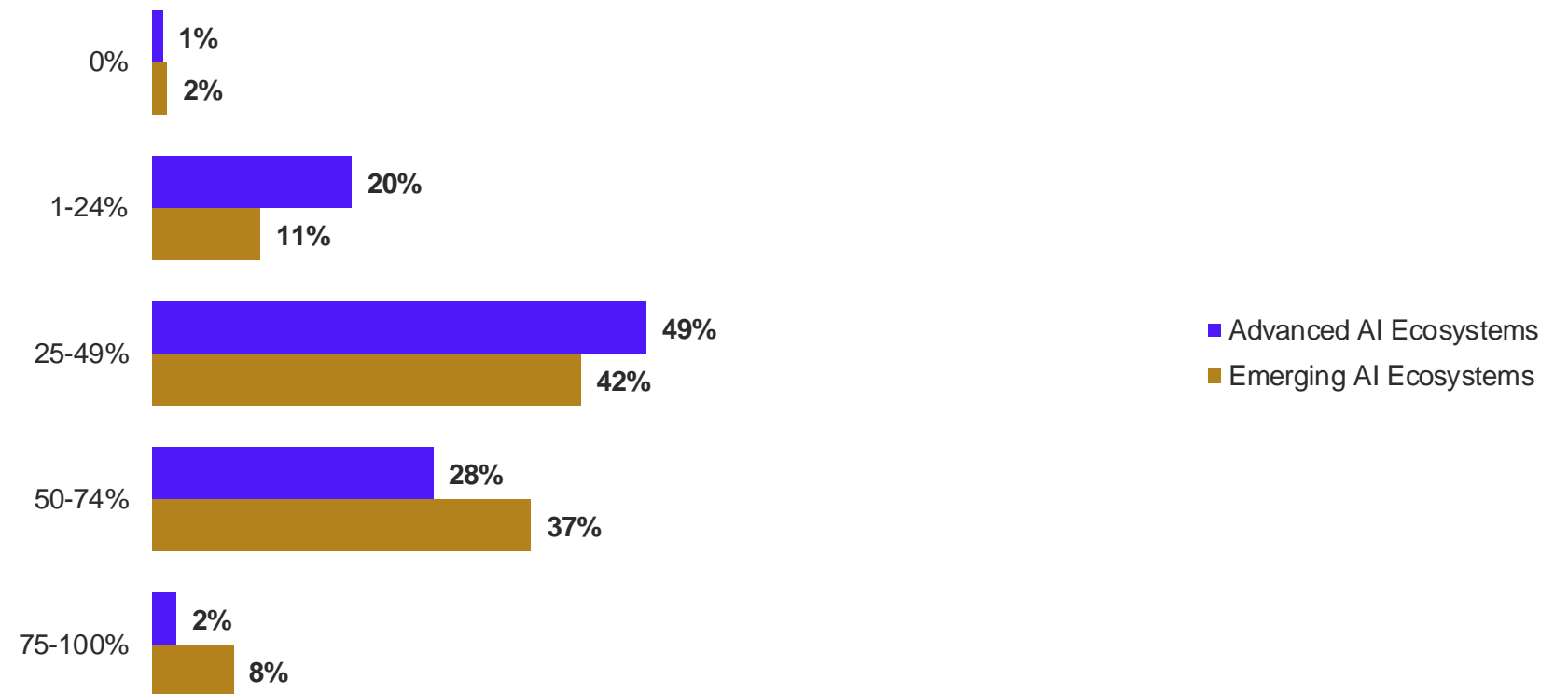
Among ITDMs in Advanced vs. Emerging AI Ecosystem Markets, Showing % Selected



## APPENDIX: ADVANCED VS. EMERGING AI ECOSYSTEM MARKETS

### Percentage of AI Solutions Based on Open-Source

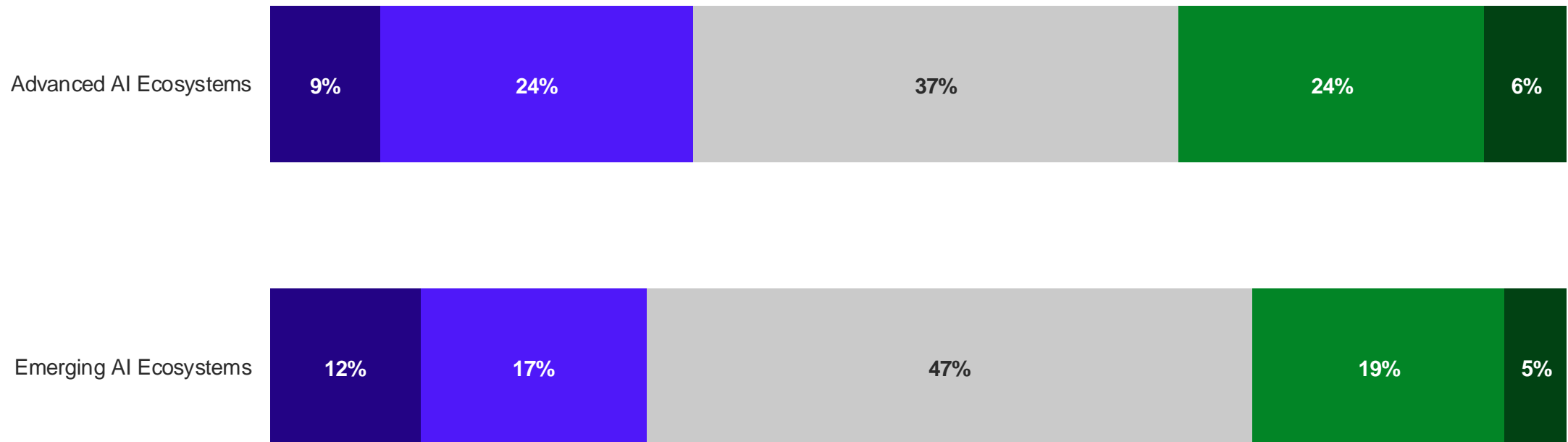
Among ITDMs in Advanced vs. Emerging AI Ecosystem Markets, Showing % Selected



## APPENDIX: ADVANCED VS. EMERGING AI ECOSYSTEM MARKETS

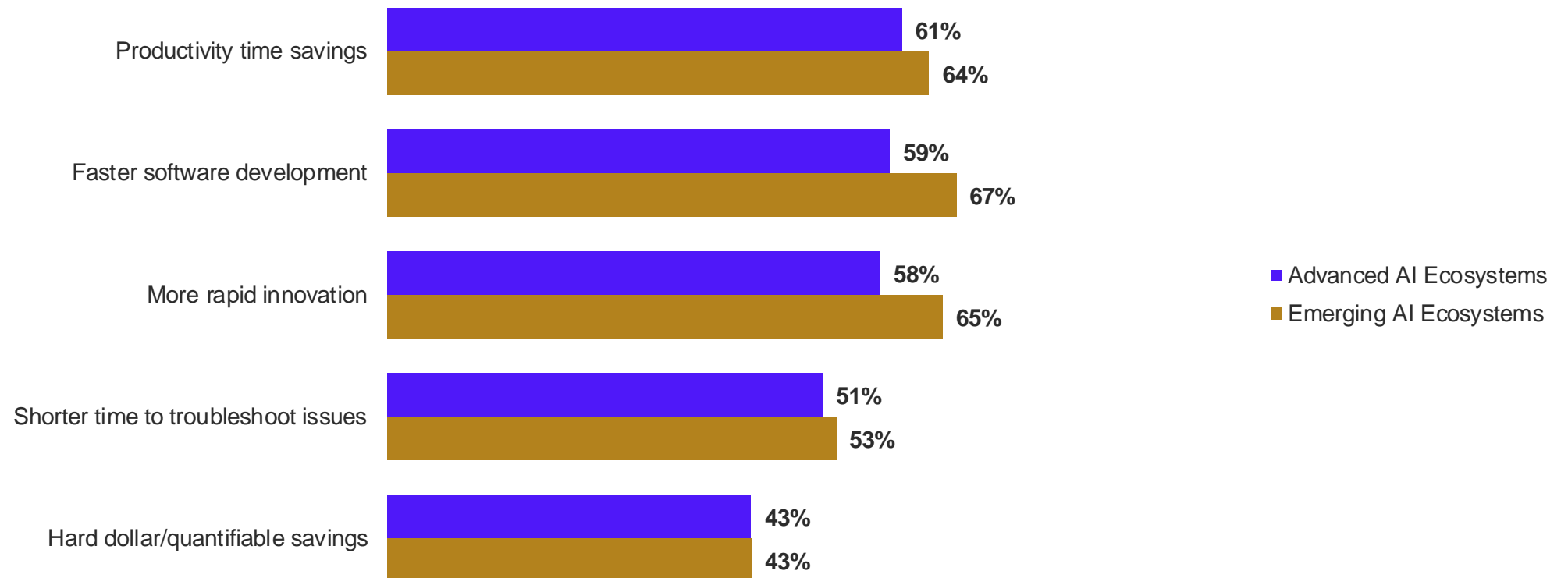
**Motivations Driving AI Implementation**  
*Among ITDMs in Advanced vs. Emerging AI Ecosystem Markets*

■ Completely innovation-driven ■ Mostly innovation-driven ■ Equally innovation-driven and ROI-driven ■ Mostly ROI-driven ■ Completely ROI-driven



## APPENDIX: ADVANCED VS. EMERGING AI ECOSYSTEM MARKETS

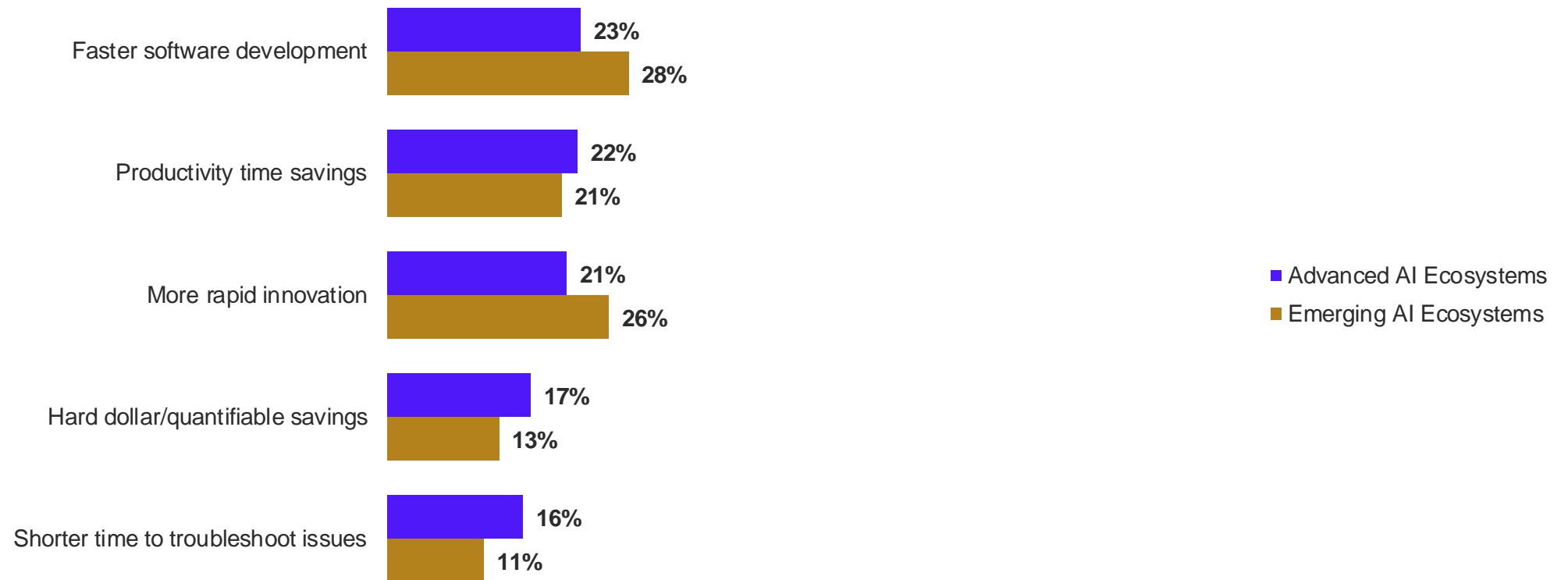
**Metrics Used to Measure ROI from AI Investments**  
*Among ITDMs in Advanced vs. Emerging AI Ecosystem Markets, Showing % Selected*



## APPENDIX: ADVANCED VS. EMERGING AI ECOSYSTEM MARKETS

### Most Important Metric When Calculating ROI from AI Investments

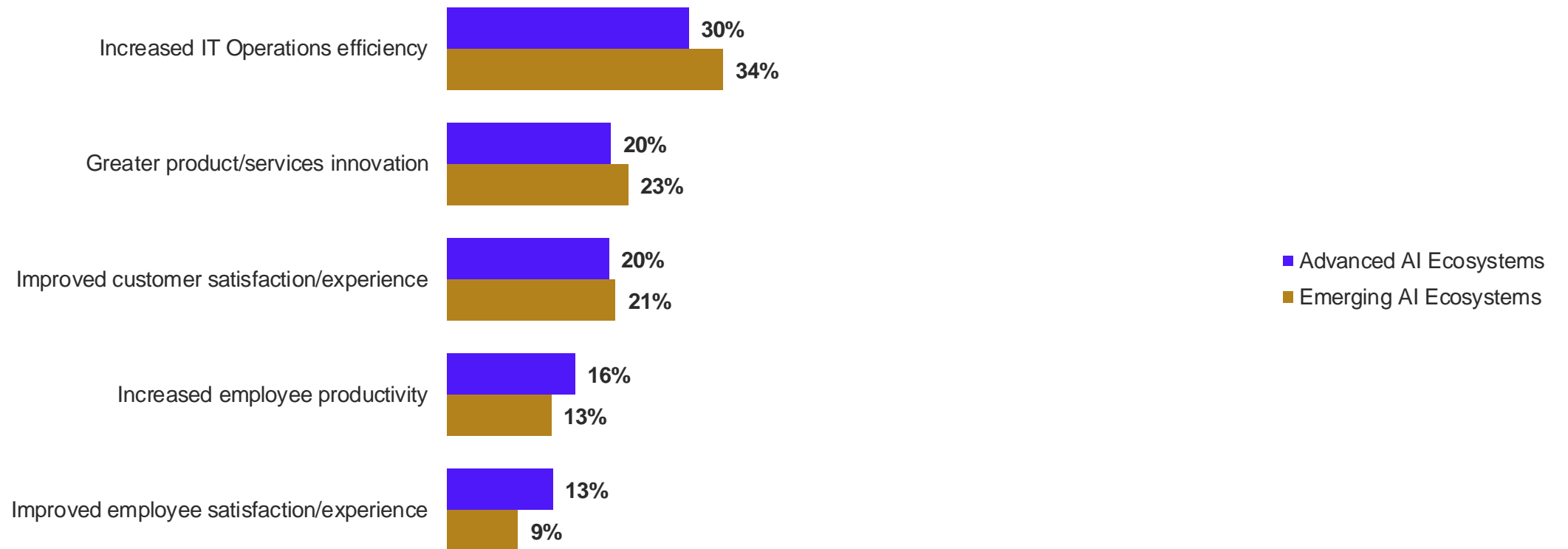
Among ITDMs in Advanced vs. Emerging AI Ecosystem Markets, Showing % Selected



## APPENDIX: ADVANCED VS. EMERGING AI ECOSYSTEM MARKETS

### Most Important Indicators of a Successful AI Strategy

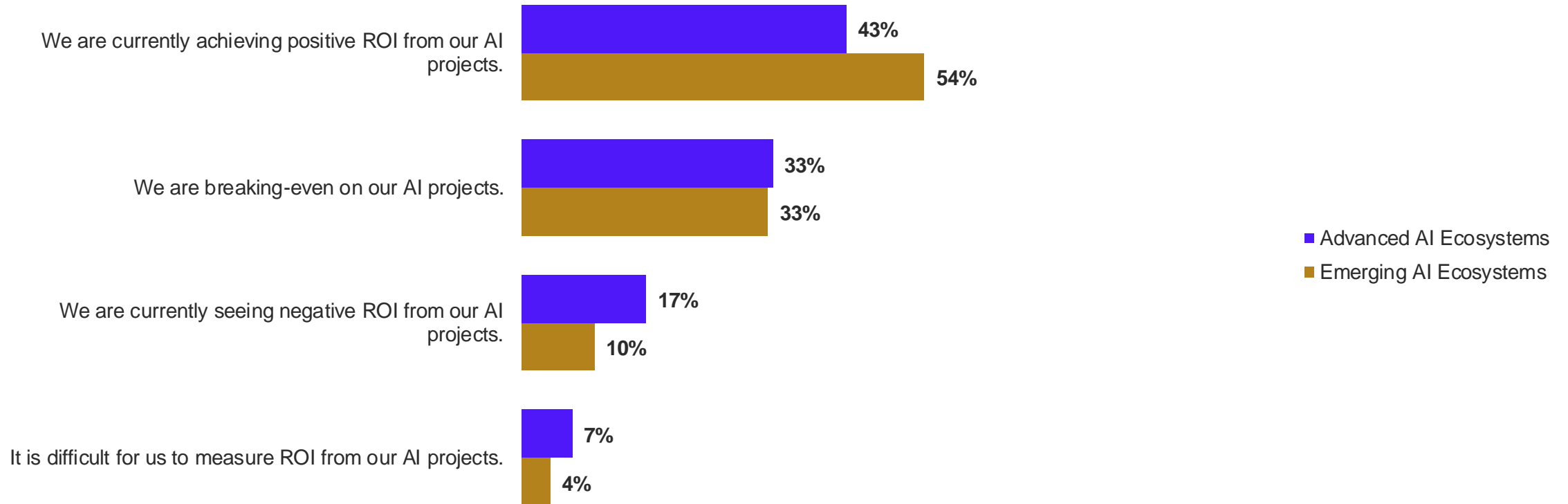
Among ITDMs in Advanced vs. Emerging AI Ecosystem Markets, Showing % Selected



## APPENDIX: ADVANCED VS. EMERGING AI ECOSYSTEM MARKETS

### ROI From 2024 AI Investments

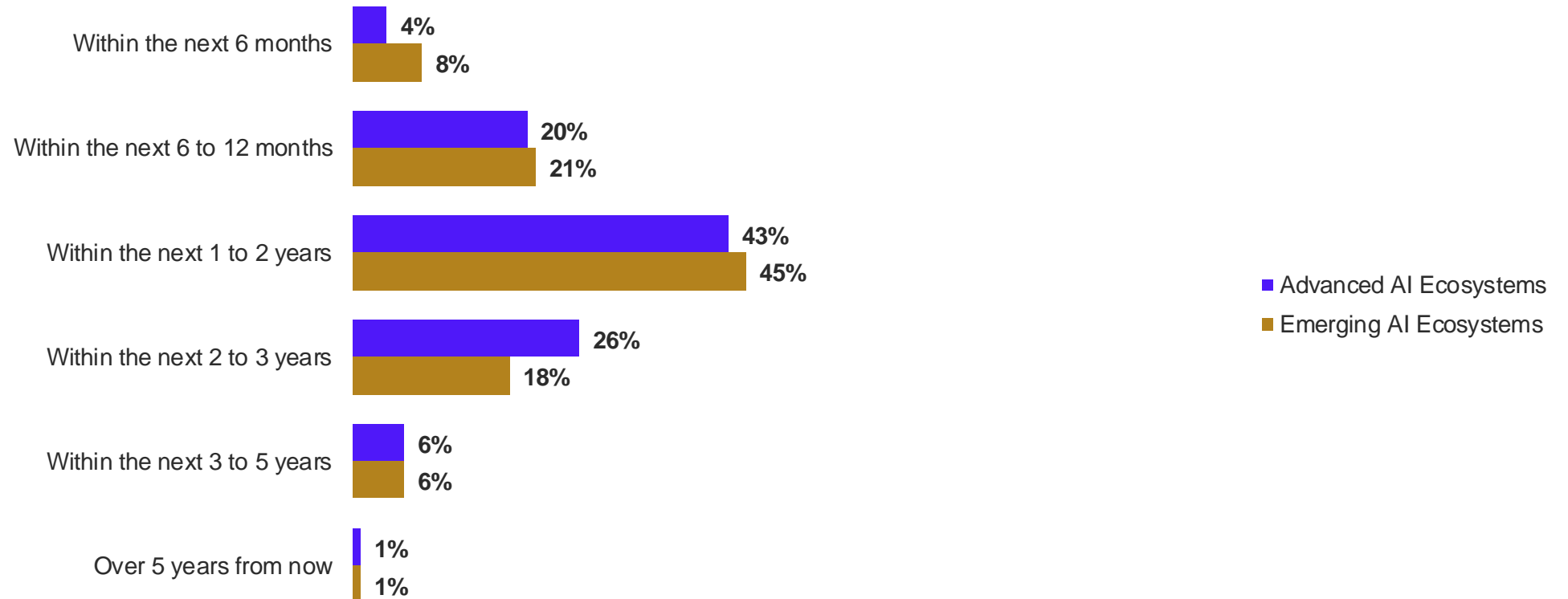
Among ITDMs in Advanced vs. Emerging AI Ecosystem Markets, Showing % Selected



## APPENDIX: ADVANCED VS. EMERGING AI ECOSYSTEM MARKETS

### Expected Timeline for Achieving Positive ROI

Among ITDMs at Companies Not Currently Seeing Positive ROI in Advanced vs. Emerging AI Ecosystem Markets, Showing % Selected

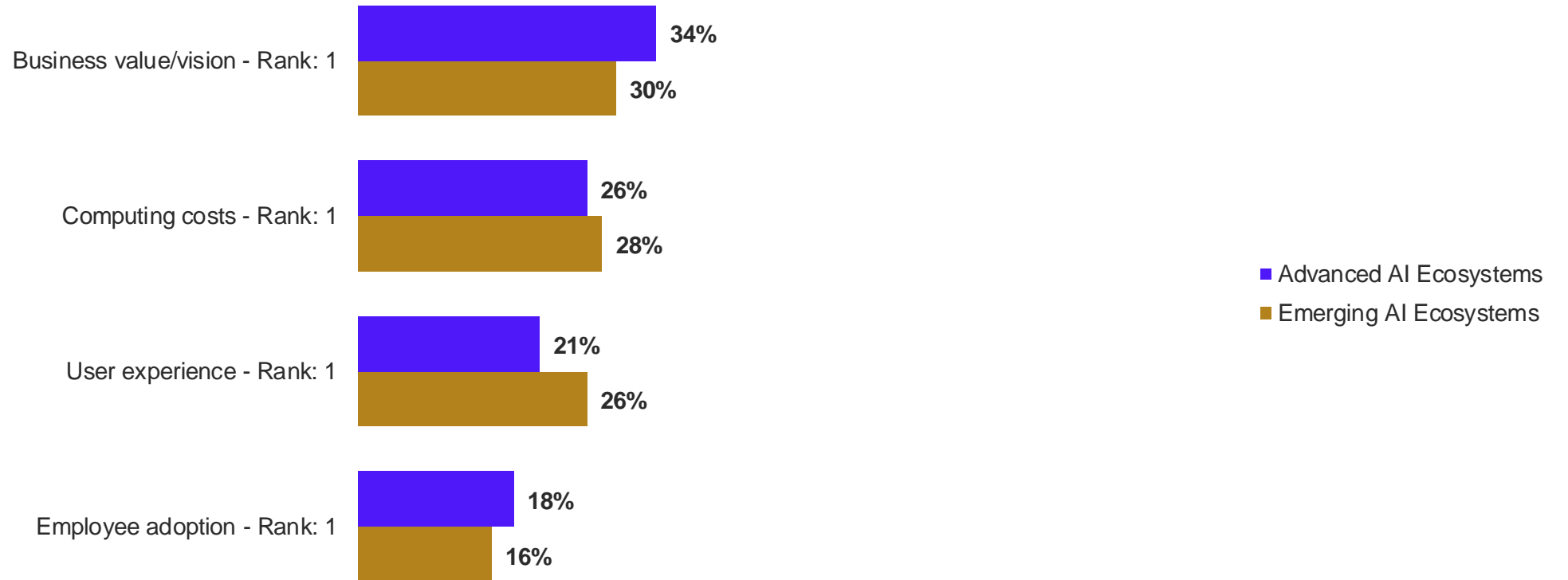




## APPENDIX: ADVANCED VS. EMERGING AI ECOSYSTEM MARKETS

### Most Influential Factor Impacting the ROI of AI Investments: Rank 1

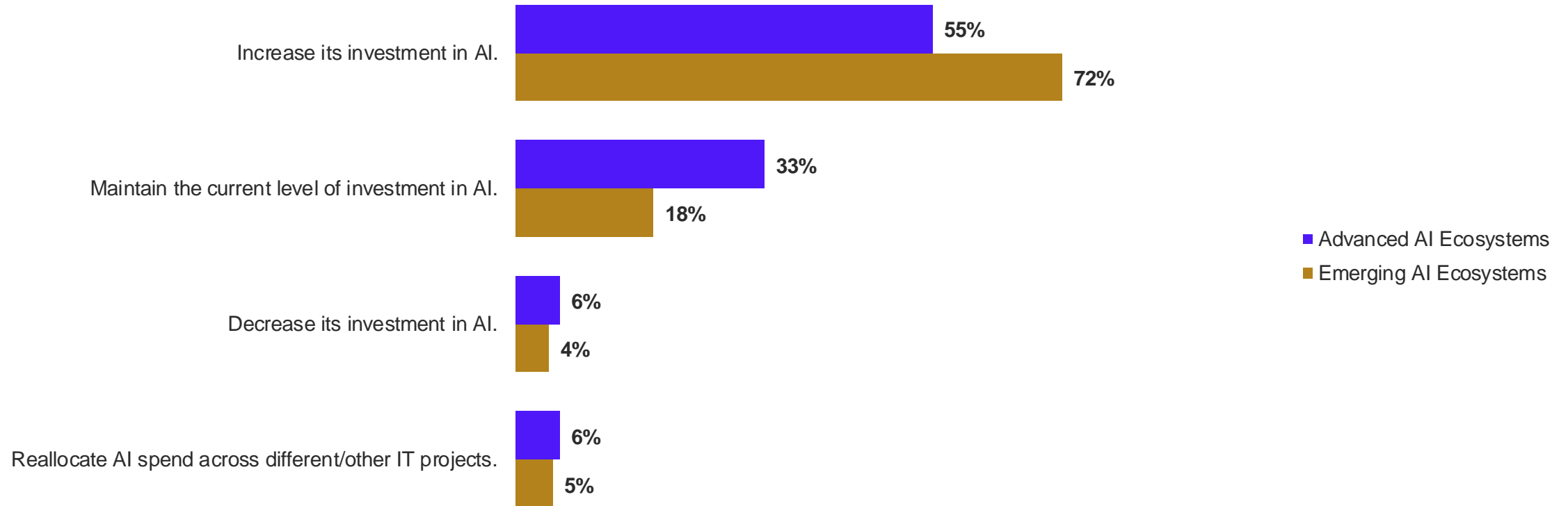
Among ITDMs in Advanced vs. Emerging AI Ecosystem Markets, Showing % Ranked 1



## APPENDIX: ADVANCED VS. EMERGING AI ECOSYSTEM MARKETS

### 2025 AI Budget Allocation

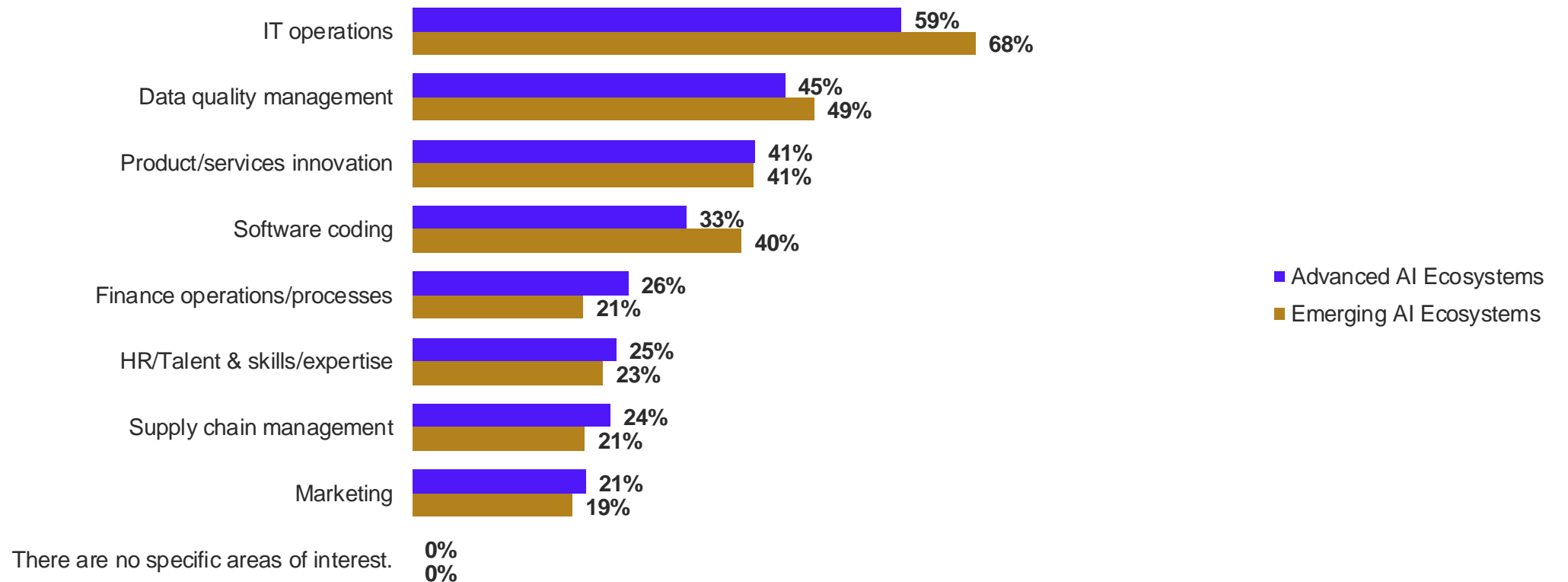
Among ITDMs in Advanced vs. Emerging AI Ecosystem Markets, Showing % Selected



## APPENDIX: ADVANCED VS. EMERGING AI ECOSYSTEM MARKETS

### Top Areas for Allocating AI Investments in 2025

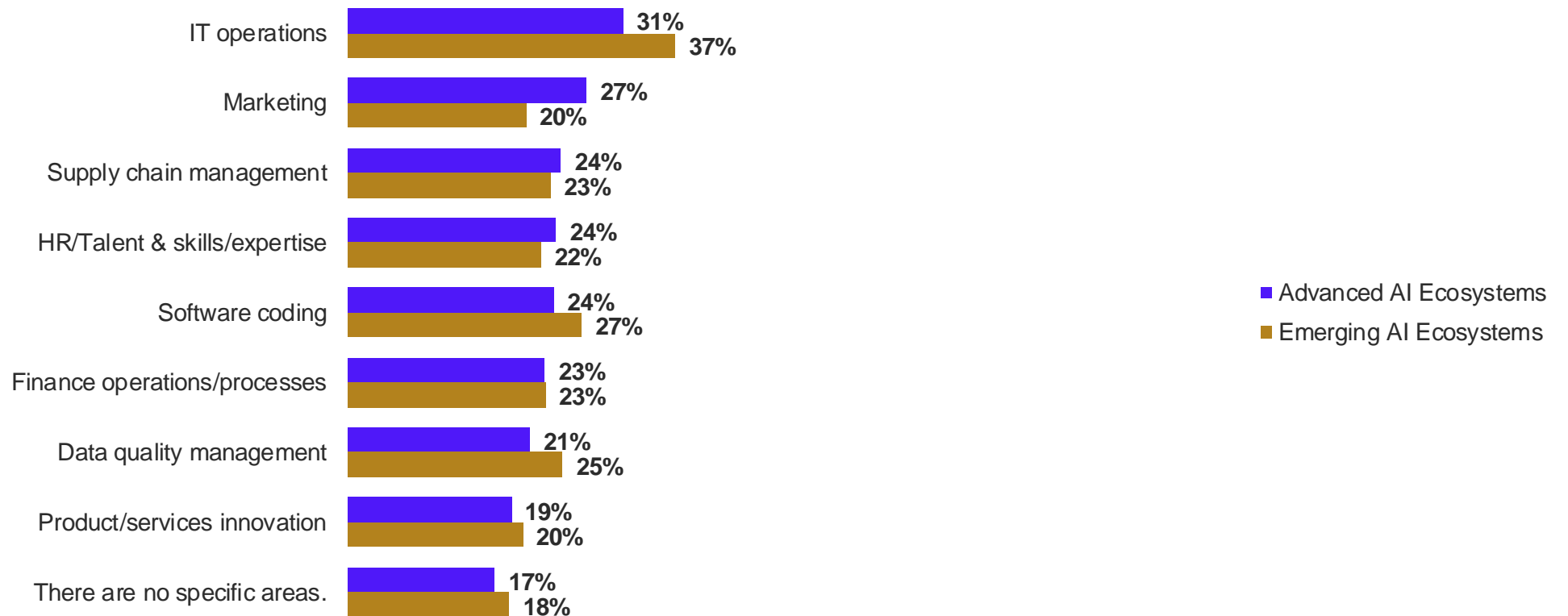
Among ITDMs in Advanced vs. Emerging AI Ecosystem Markets, Showing % Selected



## APPENDIX: ADVANCED VS. EMERGING AI ECOSYSTEM MARKETS

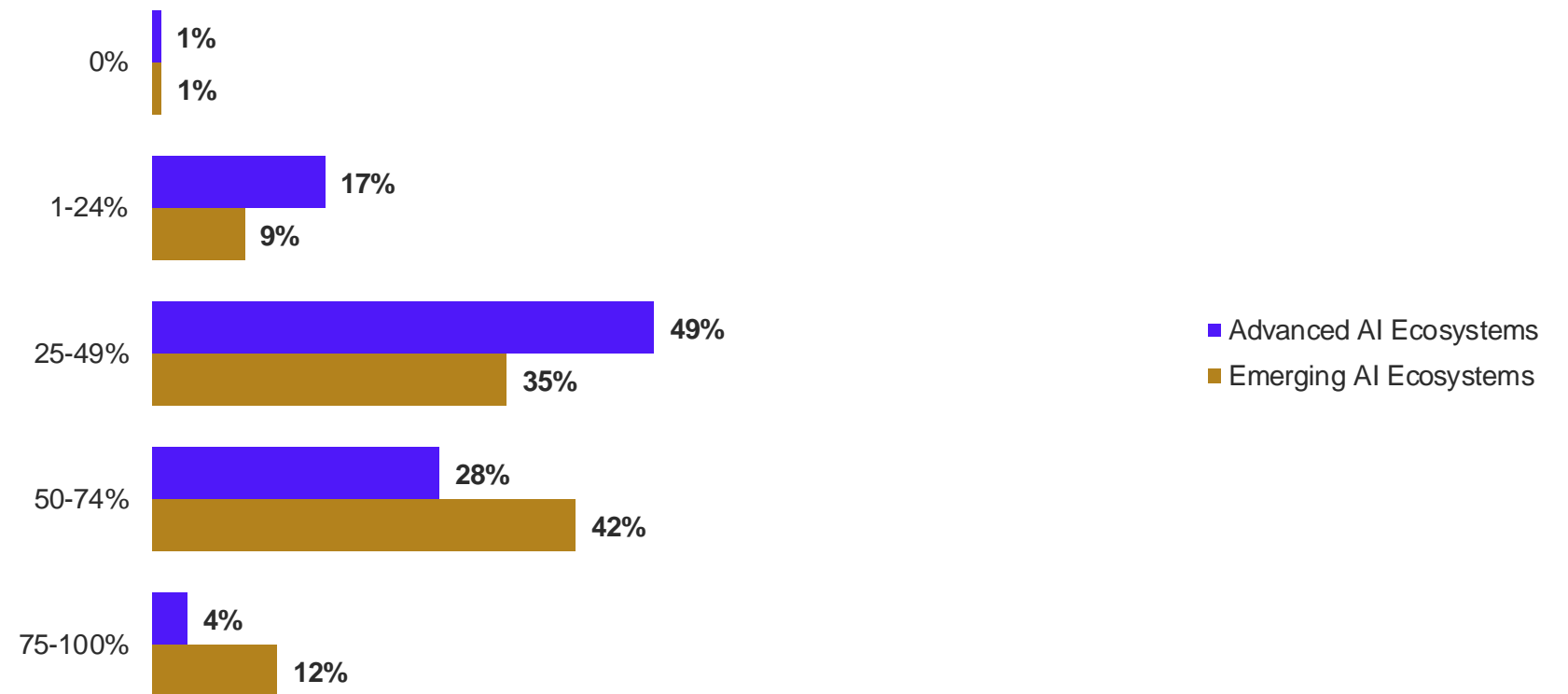
### Top Areas Likely to See AI Investments Reduced in 2025

Among ITDMs in Advanced vs. Emerging AI Ecosystem Markets, Showing % Selected



## APPENDIX: ADVANCED VS. EMERGING AI ECOSYSTEM MARKETS

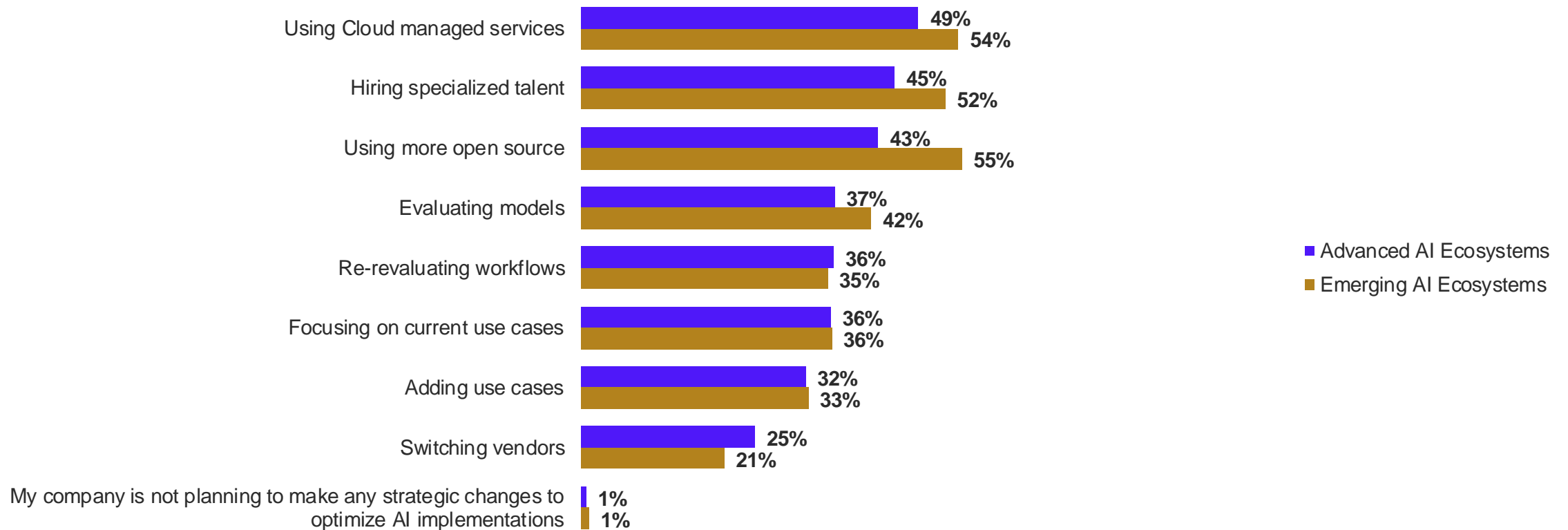
**Percentage of AI Solutions Based on Open-Source in 2025**  
*Among ITDMs in Advanced vs. Emerging AI Ecosystem Markets, Showing % Selected*



## APPENDIX: ADVANCED VS. EMERGING AI ECOSYSTEM MARKETS

### Strategic Changes to Optimize AI Implementation Planned for 2025

Among ITDMs in Advanced vs. Emerging AI Ecosystem Markets, Showing % Selected



# Appendix: ITDMs by Market



## ITDMS BY MARKET

### Progress of AI Strategy Among all ITDMS, Showing % Selected

	All ITDMS	North America		LatAm		EMEA				APAC			
		US	CANADA	MEXICO	BRAZIL	UK	FRANCE	GERMANY	SPAIN	INDIA	SINGAPORE	INDONESIA	SOUTH KOREA
We do not have an AI strategy and have no plans to create one.	1%	1%	2%	0%	0%	0%	2%	0%	2%	0%	0%	3%	2%
We do not have an AI strategy but have plans to create one soon.	5%	9%	6%	1%	3%	6%	7%	6%	4%	1%	3%	7%	12%
We have an AI strategy, but no progress has been made.	9%	8%	9%	10%	2%	8%	14%	13%	17%	1%	8%	13%	16%
We have made some progress executing our AI strategy.	42%	44%	45%	44%	34%	54%	49%	45%	48%	11%	52%	34%	36%
We have made significant progress executing our AI strategy.	43%	37%	38%	45%	61%	31%	28%	35%	29%	87%	37%	43%	34%
Sample Sizes	2413	220	215	208	230	219	220	216	217	224	217	127	100



## ITDMS BY MARKET

### Number of AI Pilots Started in 2024

Among all ITDMS, Showing % Selected

		North America		LatAm		EMEA				APAC			
	All ITDMS	US	CANADA	MEXICO	BRAZIL	UK	FRANCE	GERMANY	SPAIN	INDIA	SINGAPORE	INDONESIA	SOUTH KOREA
<b>None</b>	0%	2%	0%	0%	1%	1%	0%	0%	0%	0%	0%	0%	0%
<b>1-10</b>	28%	29%	39%	27%	27%	36%	23%	27%	34%	11%	33%	20%	26%
<b>11-20</b>	51%	55%	46%	51%	38%	53%	63%	58%	52%	44%	54%	44%	54%
<b>21-30</b>	16%	11%	11%	19%	25%	10%	10%	10%	11%	37%	10%	22%	12%
<b>More than 30</b>	5%	2%	4%	2%	8%	0%	5%	5%	2%	8%	2%	13%	8%
<i>Sample Sizes</i>	2413	220	215	208	230	219	220	216	217	224	217	127	100

## ITDMS BY MARKET

**Percentage of 2024 AI Pilots Fully Launched in 2024**  
*Among ITDMS at companies that have started AI pilots in 2024, Showing % Selected*

	All ITDMS	North America		LatAm		EMEA				APAC			
		US	CANADA	MEXICO	BRAZIL	UK	FRANCE	GERMANY	SPAIN	INDIA	SINGAPORE	INDONESIA	SOUTH KOREA
<b>None</b>	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
<b>1-10%</b>	2%	2%	5%	0%	1%	1%	1%	4%	2%	0%	3%	1%	3%
<b>11-20%</b>	5%	4%	9%	6%	4%	5%	8%	3%	7%	2%	9%	3%	4%
<b>21-30%</b>	13%	18%	16%	6%	7%	16%	16%	14%	18%	2%	19%	4%	17%
<b>31-40%</b>	16%	18%	14%	9%	10%	21%	18%	24%	19%	6%	23%	15%	24%
<b>41-50%</b>	17%	15%	16%	13%	15%	20%	18%	22%	16%	14%	19%	13%	17%
<b>61-70%</b>	13%	11%	10%	21%	17%	8%	13%	11%	14%	13%	6%	17%	11%
<b>71-80%</b>	11%	8%	10%	20%	15%	6%	8%	6%	4%	25%	6%	21%	9%
<b>81-90%</b>	7%	5%	3%	12%	12%	1%	3%	4%	2%	31%	1%	3%	1%
<b>91-100%</b>	1%	2%	1%	0%	4%	0%	0%	0%	1%	3%	0%	4%	0%
<b>Not sure / Don't know</b>	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
<i>Sample Sizes</i>	2393	213	213	208	224	217	220	216	214	224	217	127	100

## ITDMS BY MARKET

### Average Length of Time to Transition From Pilot to Full Production

Among ITDMS at companies that have started AI pilots in 2024, Showing % Selected

	All ITDMS	North America		LatAm		EMEA				APAC			
		US	CANADA	MEXICO	BRAZIL	UK	FRANCE	GERMANY	SPAIN	INDIA	SINGAPORE	INDONESIA	SOUTH KOREA
<b>Less than 6 months</b>	10%	11%	8%	16%	20%	9%	10%	7%	4%	12%	4%	6%	13%
<b>6 to 12 months</b>	48%	46%	46%	51%	49%	41%	44%	53%	53%	51%	48%	56%	41%
<b>1 to 2 years</b>	34%	32%	38%	29%	27%	37%	31%	34%	41%	32%	38%	29%	41%
<b>More than 2 years</b>	6%	7%	7%	2%	3%	11%	14%	4%	1%	5%	10%	9%	3%
<b>None of our AI pilots have moved into full production.</b>	1%	1%	1%	1%	1%	1%	1%	1%	1%	0%	0%	0%	2%
<b>Not applicable, we have never launched an AI pilot.</b>	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
<i>Sample Sizes</i>	2413	220	215	208	230	219	220	216	217	224	217	127	100

## ITDMS BY MARKET

### Obstacles Faced When Implementing AI Pilot Projects Among ITDMS at Companies that have Launched an AI Pilot, Showing % Selected

	All ITDMS	North America		LatAm		EMEA				APAC			
		US	CANADA	MEXICO	BRAZIL	UK	FRANCE	GERMANY	SPAIN	INDIA	SINGAPORE	INDONESIA	SOUTH KOREA
<b>Integration with existing systems</b>	44%	44%	44%	40%	54%	38%	40%	44%	44%	54%	46%	40%	41%
<b>Scalability issues</b>	37%	41%	47%	30%	28%	36%	37%	38%	40%	35%	40%	25%	42%
<b>Data quality and availability</b>	50%	56%	49%	37%	38%	52%	44%	51%	58%	67%	54%	33%	46%
<b>Alignment with business goals</b>	34%	31%	33%	32%	35%	27%	36%	43%	30%	43%	32%	28%	34%
<b>Skill gaps among employees</b>	37%	37%	35%	36%	36%	41%	33%	39%	33%	43%	42%	34%	38%
<b>Budget constraints</b>	34%	36%	35%	22%	18%	34%	33%	38%	32%	57%	35%	24%	40%
<b>Ongoing monitoring/maintenance</b>	36%	31%	32%	38%	31%	35%	37%	36%	35%	54%	33%	28%	41%
<b>Transparency and explainability requirements</b>	33%	29%	33%	26%	18%	29%	39%	33%	36%	52%	30%	29%	40%
<b>Other, please specify:</b>	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
<b>My company hasn't encountered any obstacles.</b>	4%	4%	0%	7%	9%	5%	2%	0%	1%	4%	0%	19%	0%
<i>Sample Sizes</i>	2409	217	215	208	230	219	220	216	217	223	217	127	100

## ITDMS BY MARKET

**Source of AI Tools**  
Among all ITDMS, Showing % Selected

	All ITDMS	North America		LatAm		EMEA				APAC			
		US	CANADA	MEXICO	BRAZIL	UK	FRANCE	GERMANY	SPAIN	INDIA	SINGAPORE	INDONESIA	SOUTH KOREA
<b>Buy or lease from vendors</b>	67%	70%	65%	61%	70%	69%	69%	74%	68%	60%	55%	80%	75%
<b>Open-source ecosystem</b>	61%	55%	57%	65%	43%	57%	55%	59%	66%	89%	53%	73%	75%
<b>In-house development</b>	55%	50%	42%	73%	62%	36%	45%	45%	55%	68%	62%	79%	61%
<i>Sample Sizes</i>	2413	220	215	208	230	219	220	216	217	224	217	127	100

## ITDMS BY MARKET

### Significant Challenges When Implementing AI

Among all ITDMS, Showing % Selected 'Very challenging'

		North America		LatAm		EMEA				APAC			
	All ITDMS	US	CANADA	MEXICO	BRAZIL	UK	FRANCE	GERMANY	SPAIN	INDIA	SINGAPORE	INDONESIA	SOUTH KOREA
Employee adoption	18%	15%	23%	9%	22%	15%	21%	16%	16%	36%	14%	7%	11%
Technology integration	23%	28%	27%	10%	28%	21%	26%	26%	15%	51%	16%	5%	17%
Lack of AI expertise	23%	23%	27%	10%	23%	23%	21%	25%	18%	51%	16%	12%	15%
Data management	20%	23%	23%	13%	22%	19%	20%	24%	15%	41%	14%	2%	10%
Failure to deliver business value	19%	17%	25%	10%	14%	21%	18%	24%	20%	39%	14%	6%	15%
Lack of C-Suite support	16%	19%	21%	8%	16%	16%	19%	22%	12%	24%	10%	9%	9%
Lack of AI governance	22%	21%	25%	12%	24%	22%	19%	20%	20%	53%	11%	7%	17%
Sample Sizes	2413	220	215	208	230	219	220	216	217	224	217	127	100

## ITDMS BY MARKET

### Number of AI Pilots Planned for 2025

Among all ITDMS, Showing % Selected

		North America		LatAm		EMEA				APAC			
	All ITDMS	US	CANADA	MEXICO	BRAZIL	UK	FRANCE	GERMANY	SPAIN	INDIA	SINGAPORE	INDONESIA	SOUTH KOREA
<b>None</b>	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
<b>1-10</b>	21%	26%	28%	13%	17%	26%	18%	26%	28%	5%	28%	17%	20%
<b>11-20</b>	44%	48%	42%	50%	32%	50%	58%	50%	41%	30%	53%	31%	42%
<b>21-30</b>	22%	20%	20%	29%	31%	19%	18%	16%	24%	28%	17%	21%	25%
<b>More than 30</b>	11%	4%	9%	8%	18%	2%	5%	7%	6%	37%	3%	31%	13%
<b>Not sure / Don't know</b>	1%	2%	0%	0%	1%	2%	0%	0%	1%	0%	0%	0%	0%
<i>Sample Sizes</i>	2413	220	215	208	230	219	220	216	217	224	217	127	100

## ITDMS BY MARKET

### Percentage of AI Solutions Based on Open-Source *Among all ITDMS, Showing % Selected*

	North America		LatAm		EMEA				APAC				
	All ITDMS	US	CANADA	MEXICO	BRAZIL	UK	FRANCE	GERMANY	SPAIN	INDIA	SINGAPORE	INDONESIA	SOUTH KOREA
<b>0%</b>	1%	3%	2%	2%	3%	1%	0%	0%	2%	0%	0%	2%	0%
<b>1-24%</b>	16%	20%	23%	7%	13%	23%	15%	19%	21%	4%	19%	8%	17%
<b>25-49%</b>	46%	51%	47%	41%	41%	50%	47%	50%	43%	48%	49%	35%	44%
<b>50-74%</b>	32%	21%	25%	40%	37%	23%	34%	31%	31%	41%	29%	38%	35%
<b>75-100%</b>	5%	4%	2%	10%	7%	3%	3%	0%	2%	8%	2%	18%	4%
<i>Sample Sizes</i>	2413	220	215	208	230	219	220	216	217	224	217	127	100



## ITDMS BY MARKET

### Motivations Driving AI Implementation

Among all ITDMS, Showing % Selected

	All ITDMS	North America		LatAm		EMEA				APAC			
		US	CANADA	MEXICO	BRAZIL	UK	FRANCE	GERMANY	SPAIN	INDIA	SINGAPORE	INDONESIA	SOUTH KOREA
Completely innovation-driven	10%	11%	5%	15%	20%	10%	7%	7%	7%	6%	15%	8%	2%
Mostly innovation-driven	21%	21%	26%	16%	21%	23%	25%	23%	21%	15%	29%	11%	17%
Equally innovation-driven and ROI-driven	41%	40%	39%	41%	35%	41%	36%	38%	45%	62%	24%	54%	52%
Mostly ROI-driven	22%	20%	23%	21%	19%	22%	26%	25%	24%	13%	24%	22%	26%
Completely ROI-driven	6%	8%	7%	7%	5%	4%	6%	6%	3%	4%	8%	6%	3%
Sample Sizes	2413	220	215	208	230	219	220	216	217	224	217	127	100

## ITDMS BY MARKET

### Metrics Used to Measure ROI from AI Investments

Among all ITDMS, Showing % Selected

	All ITDMS	North America		LatAm		EMEA				APAC			
		US	CANADA	MEXICO	BRAZIL	UK	FRANCE	GERMANY	SPAIN	INDIA	SINGAPORE	INDONESIA	SOUTH KOREA
Hard dollar/quantifiable savings	43%	41%	43%	38%	50%	40%	42%	49%	49%	37%	43%	39%	40%
Productivity time savings	62%	61%	60%	67%	59%	61%	59%	56%	63%	71%	63%	55%	67%
Shorter time to troubleshoot issues	52%	48%	49%	51%	53%	45%	52%	55%	51%	59%	49%	50%	73%
Faster software development	62%	55%	59%	58%	62%	63%	58%	64%	67%	83%	58%	62%	55%
More rapid innovation	61%	58%	59%	62%	63%	55%	60%	55%	58%	73%	61%	75%	59%
Other, please specify:	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
My company does not use any metrics to calculate ROI from AI investments.	0%	1%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%
Not sure / Don't know	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Sample Sizes	2413	220	215	208	230	219	220	216	217	224	217	127	100

## ITDMS BY MARKET

### Most Important Metric When Calculating ROI from AI Investments

Among all ITDMS, Showing % Selected

		North America		LatAm		EMEA				APAC			
	All ITDMS	US	CANADA	MEXICO	BRAZIL	UK	FRANCE	GERMANY	SPAIN	INDIA	SINGAPORE	INDONESIA	SOUTH KOREA
<b>Hard dollar/quantifiable savings</b>	15%	20%	16%	11%	13%	14%	16%	17%	17%	11%	21%	16%	14%
<b>Productivity time savings</b>	22%	23%	21%	26%	21%	26%	20%	18%	24%	17%	25%	11%	27%
<b>Shorter time to troubleshoot issues</b>	14%	13%	17%	13%	11%	14%	19%	19%	15%	6%	10%	13%	27%
<b>Faster software development</b>	25%	21%	21%	23%	31%	26%	21%	28%	27%	34%	22%	26%	16%
<b>More rapid innovation</b>	23%	21%	25%	27%	24%	20%	23%	18%	17%	32%	22%	34%	16%
<i>Sample Sizes</i>	2413	220	215	208	230	219	220	216	217	224	217	127	100

## ITDMS BY MARKET

### Most Important Indicators of a Successful AI Strategy

Among all ITDMS, Showing % Selected

	All ITDMS	North America		LatAm		EMEA				APAC			
		US	CANADA	MEXICO	BRAZIL	UK	FRANCE	GERMANY	SPAIN	INDIA	SINGAPORE	INDONESIA	SOUTH KOREA
Increased employee productivity	15%	20%	13%	15%	10%	16%	15%	16%	17%	12%	13%	10%	22%
Improved employee satisfaction/experience	11%	12%	13%	8%	7%	11%	16%	16%	12%	7%	15%	12%	8%
Improved customer satisfaction/experience	21%	18%	19%	26%	23%	21%	19%	22%	19%	21%	21%	13%	24%
Greater product/services innovation	21%	18%	24%	22%	23%	22%	23%	19%	17%	31%	18%	17%	15%
Increased IT Operations efficiency	32%	33%	31%	28%	37%	31%	27%	27%	35%	29%	32%	47%	31%
Sample Sizes	2413	220	215	208	230	219	220	216	217	224	217	127	100

## ITDMS BY MARKET

### ROI From 2024 AI Investments

Among all ITDMS, Showing % Selected

	All ITDMS	North America		LatAm		EMEA				APAC			
		US	CANADA	MEXICO	BRAZIL	UK	FRANCE	GERMANY	SPAIN	INDIA	SINGAPORE	INDONESIA	SOUTH KOREA
<b>We are currently achieving positive ROI from our AI projects.</b>	47%	48%	42%	49%	48%	42%	29%	41%	39%	76%	54%	57%	51%
<b>We are breaking-even on our AI projects.</b>	33%	30%	31%	34%	47%	32%	40%	33%	38%	19%	33%	21%	34%
<b>We are currently seeing negative ROI from our AI projects.</b>	14%	16%	18%	11%	3%	20%	21%	19%	18%	4%	9%	17%	10%
<b>It is difficult for us to measure ROI from our AI projects.</b>	6%	6%	9%	6%	3%	6%	10%	6%	5%	1%	4%	6%	5%
<i>Sample Sizes</i>	2413	220	215	208	230	219	220	216	217	224	217	127	100

## ITDMS BY MARKET

### Expected Timeline for Achieving Positive ROI

Among all ITDMS at Companies Not Currently Seeing Positive ROI, Showing % Selected

		North America		LatAm		EMEA				APAC			
	All ITDMS	US	CANADA	MEXICO	BRAZIL	UK	FRANCE	GERMANY	SPAIN	INDIA	SINGAPORE	INDONESIA	SOUTH KOREA
Within the next 6 months	5%	7%	3%	6%	14%	4%	3%	4%	6%	12%	2%	0%	2%
Within the next 6 to 12 months	20%	17%	17%	23%	24%	16%	23%	23%	19%	21%	28%	17%	11%
Within the next 1 to 2 years	44%	44%	46%	38%	39%	51%	36%	39%	54%	54%	46%	44%	48%
Within the next 2 to 3 years	23%	26%	26%	19%	11%	23%	27%	30%	19%	13%	18%	31%	30%
Within the next 3 to 5 years	6%	5%	6%	13%	8%	5%	10%	5%	2%	0%	5%	8%	5%
Over 5 years from now	1%	1%	3%	0%	4%	0%	0%	0%	0%	0%	0%	0%	2%
I'm not sure when, but expect to see positive ROI eventually	0%	1%	0%	0%	1%	1%	0%	0%	0%	0%	0%	0%	2%
Sample Sizes	1132	101	105	94	113	113	135	114	121	52	92	48	44

## ITDMS BY MARKET

### Most Influential Factor Impacting the ROI of AI Investments: Rank 1

Among all ITDMS, Showing % Ranked 1

	All ITDMS	North America		LatAm		EMEA				APAC			
		US	CANADA	MEXICO	BRAZIL	UK	FRANCE	GERMANY	SPAIN	INDIA	SINGAPORE	INDONESIA	SOUTH KOREA
Employee adoption – Rank: 1	17%	18%	13%	18%	10%	18%	15%	18%	23%	14%	24%	10%	22%
Computing costs – Rank: 1	27%	24%	31%	31%	26%	26%	34%	22%	29%	24%	23%	34%	24%
Business value/vision – Rank: 1	33%	34%	35%	23%	34%	35%	31%	40%	29%	31%	30%	32%	38%
User experience – Rank: 1	23%	24%	21%	27%	30%	21%	20%	20%	19%	31%	23%	24%	16%
Sample Sizes	2413	220	215	208	230	219	220	216	217	224	217	127	100

## ITDMS BY MARKET

### 2025 AI Budget Allocation Among all ITDMS, Showing % Selected

		North America		LatAm		EMEA				APAC			
	All ITDMS	US	CANADA	MEXICO	BRAZIL	UK	FRANCE	GERMANY	SPAIN	INDIA	SINGAPORE	INDONESIA	SOUTH KOREA
<b>Increase its investment in AI.</b>	62%	61%	56%	69%	78%	57%	41%	51%	61%	93%	57%	48%	71%
<b>Maintain the current level of investment in AI.</b>	27%	30%	35%	18%	16%	33%	40%	31%	27%	4%	35%	33%	20%
<b>Decrease its investment in AI.</b>	5%	4%	4%	3%	1%	5%	11%	9%	8%	1%	1%	13%	7%
<b>Reallocate AI spend across different/other IT projects.</b>	6%	5%	4%	10%	5%	5%	8%	9%	3%	2%	6%	6%	2%
<b>Not sure / Don't know</b>	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
<i>Sample Sizes</i>	2413	220	215	208	230	219	220	216	217	224	217	127	100



## ITDMS BY MARKET

### Top Areas for Allocating AI Investments in 2025

Among all ITDMS, Showing % Selected

	All ITDMS	North America		LatAm		EMEA				APAC			
		US	CANADA	MEXICO	BRAZIL	UK	FRANCE	GERMANY	SPAIN	INDIA	SINGAPORE	INDONESIA	SOUTH KOREA
HR/Talent & skills/expertise	24%	31%	19%	33%	17%	28%	27%	20%	22%	14%	24%	35%	19%
Data quality management	46%	50%	46%	50%	49%	47%	44%	44%	44%	55%	39%	41%	44%
IT operations	63%	62%	66%	40%	78%	61%	47%	62%	68%	83%	56%	68%	59%
Software coding	36%	36%	41%	36%	41%	31%	30%	27%	32%	56%	35%	28%	28%
Supply chain management	23%	19%	18%	24%	13%	19%	27%	27%	23%	21%	30%	28%	31%
Finance operations/processes	24%	20%	19%	29%	13%	31%	23%	32%	25%	12%	32%	29%	26%
Marketing	20%	19%	20%	16%	22%	20%	29%	21%	26%	11%	18%	23%	19%
Product/services innovation	41%	37%	40%	50%	48%	43%	40%	42%	35%	34%	43%	37%	48%
There are no specific areas of interest.	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Sample Sizes	2413	220	215	208	230	219	220	216	217	224	217	127	100

## ITDMS BY MARKET

### Top Areas Likely to See AI Investments Reduced in 2025

Among all ITDMS, Showing % Selected

	All ITDMS	North America		LatAm		EMEA				APAC			
		US	CANADA	MEXICO	BRAZIL	UK	FRANCE	GERMANY	SPAIN	INDIA	SINGAPORE	INDONESIA	SOUTH KOREA
HR/Talent & skills/expertise	23%	23%	25%	19%	23%	28%	22%	25%	19%	22%	19%	29%	27%
Data quality management	22%	23%	18%	18%	17%	21%	22%	19%	23%	38%	23%	29%	21%
IT operations	34%	35%	37%	20%	27%	32%	23%	19%	38%	61%	36%	43%	45%
Software coding	25%	24%	21%	20%	20%	25%	24%	17%	22%	44%	25%	28%	36%
Supply chain management	24%	19%	23%	18%	21%	21%	26%	30%	21%	29%	27%	28%	25%
Finance operations/processes	23%	19%	19%	22%	20%	24%	25%	19%	23%	22%	28%	28%	22%
Marketing	24%	19%	29%	19%	17%	27%	29%	31%	23%	13%	24%	37%	39%
Product/services innovation	19%	17%	21%	15%	16%	10%	27%	14%	13%	31%	23%	27%	19%
Other, please specify:	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%
Not sure / Don't know	1%	2%	0%	3%	1%	1%	0%	0%	0%	0%	0%	0%	0%
There are no specific areas.	18%	23%	12%	28%	23%	18%	15%	19%	21%	5%	20%	13%	3%
Sample Sizes	2413	220	215	208	230	219	220	216	217	224	217	127	100

## ITDMS BY MARKET

### Percentage of AI Solutions Based on Open-Source in 2025

Among all ITDMS, Showing % Selected

		North America		LatAm		EMEA				APAC			
	All ITDMS	US	CANADA	MEXICO	BRAZIL	UK	FRANCE	GERMANY	SPAIN	INDIA	SINGAPORE	INDONESIA	SOUTH KOREA
<b>0%</b>	1%	2%	2%	1%	2%	1%	0%	0%	0%	1%	0%	1%	0%
<b>1-24%</b>	14%	23%	20%	7%	10%	17%	14%	13%	16%	4%	15%	9%	19%
<b>25-49%</b>	43%	47%	45%	37%	38%	50%	52%	51%	40%	26%	58%	34%	36%
<b>50-74%</b>	34%	22%	30%	40%	39%	29%	29%	33%	35%	60%	25%	31%	35%
<b>75-100%</b>	7%	3%	3%	15%	10%	2%	5%	3%	7%	10%	2%	26%	10%
<b>Not sure / Don't know</b>	1%	3%	0%	0%	1%	1%	0%	0%	1%	0%	0%	0%	0%
<i>Sample Sizes</i>	2413	220	215	208	230	219	220	216	217	224	217	127	100

## ITDMS BY MARKET

### Strategic Changes to Optimize AI Implementation Planned for 2025

Among all ITDMS, Showing % Selected

		North America		LatAm		EMEA				APAC			
	All ITDMS	US	CANADA	MEXICO	BRAZIL	UK	FRANCE	GERMANY	SPAIN	INDIA	SINGAPORE	INDONESIA	SOUTH KOREA
<b>Evaluating models</b>	39%	41%	43%	35%	42%	43%	26%	30%	43%	46%	37%	41%	34%
<b>Using more open source</b>	48%	41%	41%	45%	50%	38%	41%	49%	51%	71%	44%	57%	49%
<b>Switching vendors</b>	23%	20%	27%	22%	13%	21%	26%	27%	19%	29%	26%	20%	32%
<b>Hiring specialized talent</b>	48%	48%	41%	54%	51%	47%	37%	45%	43%	66%	51%	45%	48%
<b>Re-evaluating workflows</b>	36%	38%	34%	35%	45%	38%	35%	37%	26%	35%	38%	37%	32%
<b>Adding use cases</b>	32%	31%	30%	33%	25%	29%	30%	36%	35%	38%	35%	34%	40%
<b>Focusing on current use cases</b>	36%	35%	30%	31%	24%	32%	37%	38%	45%	45%	40%	36%	44%
<b>Using Cloud managed services</b>	51%	58%	49%	47%	58%	51%	40%	50%	45%	70%	41%	49%	57%
<b>My company is not planning to make any strategic changes to optimize AI implementations</b>	1%	2%	0%	0%	2%	1%	0%	0%	1%	2%	0%	0%	0%
<b>Not sure/Don't know</b>	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%
<i>Sample Sizes</i>	2413	220	215	208	230	219	220	216	217	224	217	127	100

