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ROI of AI

For IBM

Developed in collaboration with Lopez Research

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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)**
All ITDMs	**2,413**	**+/- 2%**
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%

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

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

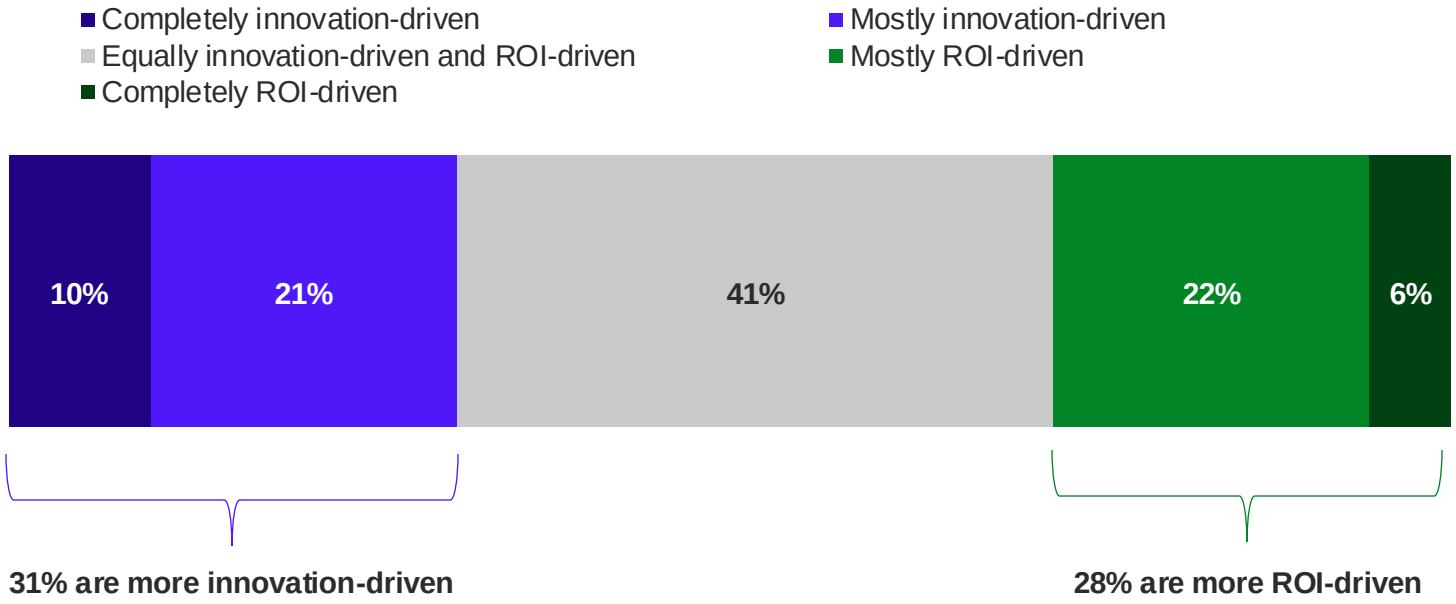
Data Deep Dive

- 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).

IBM1 Which of the following statements best describes your organization's AI strategy today?
Sample Size: ITDMs = 2,413

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

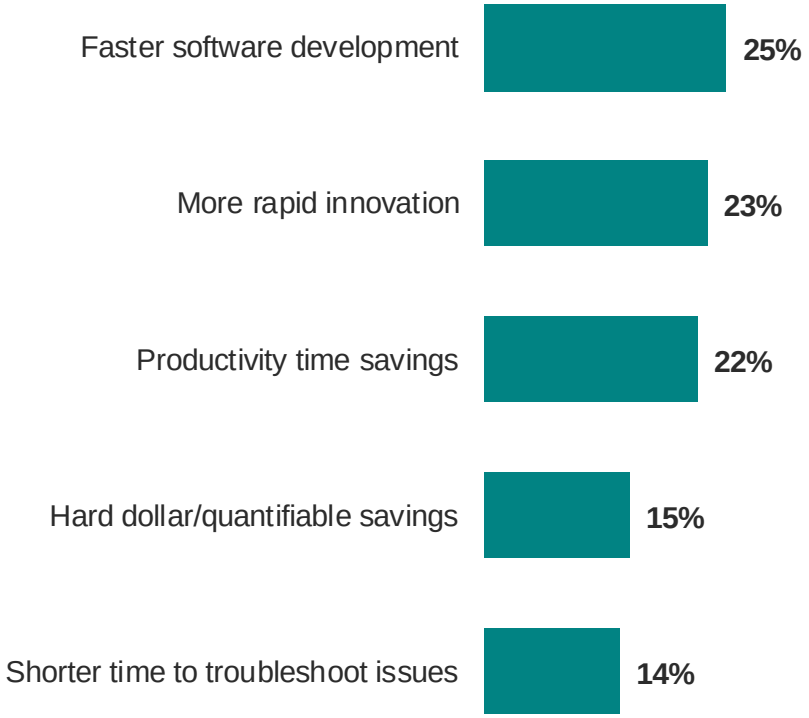
- Companies in Brazil and Singapore are more likely to be innovation-driven when it comes to implementing AI (Brazil = 41% innovation-driven vs. 24% ROI-driven, Singapore 44% innovation-driven vs. 31% ROI-driven).

IBM11 What is the primary motivation driving AI implementation at your company?
Sample Size: ITDMs = 2,413

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

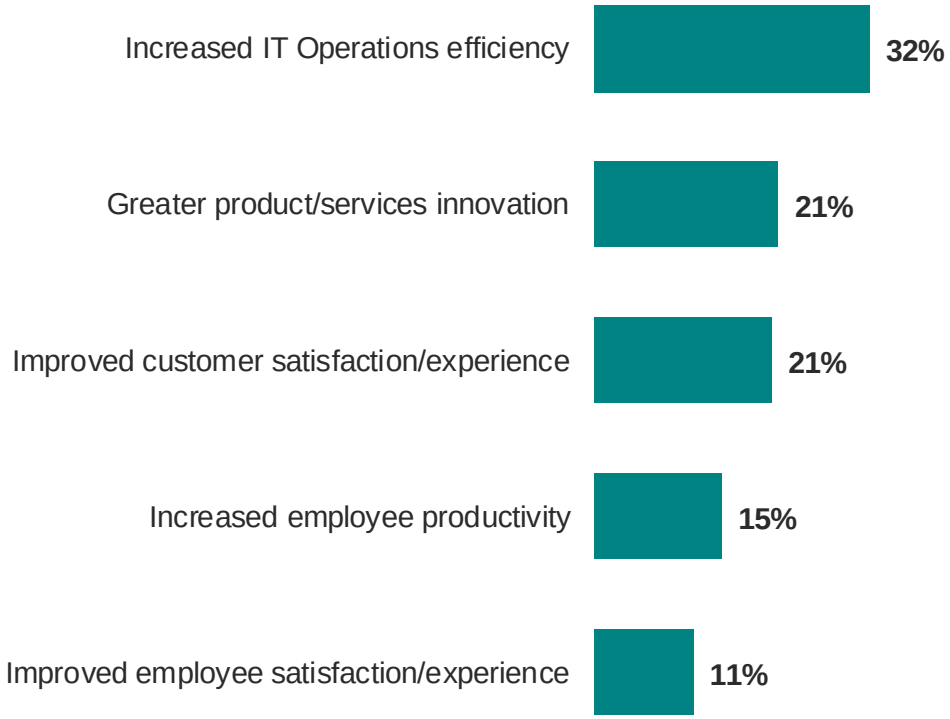
- **Open-Source Insight: Faster innovation is a more critical metric at organizations utilizing open-source** for AI tooling (26% vs. 19% at companies not using open-source).
- Organizations in South Korea are significantly more likely to consider shorter time to troubleshoot issues the most important 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.

IBM12a Which of these metrics is most important to your company when measuring ROI from AI investments?
Sample Size: ITDMs = 2,413

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



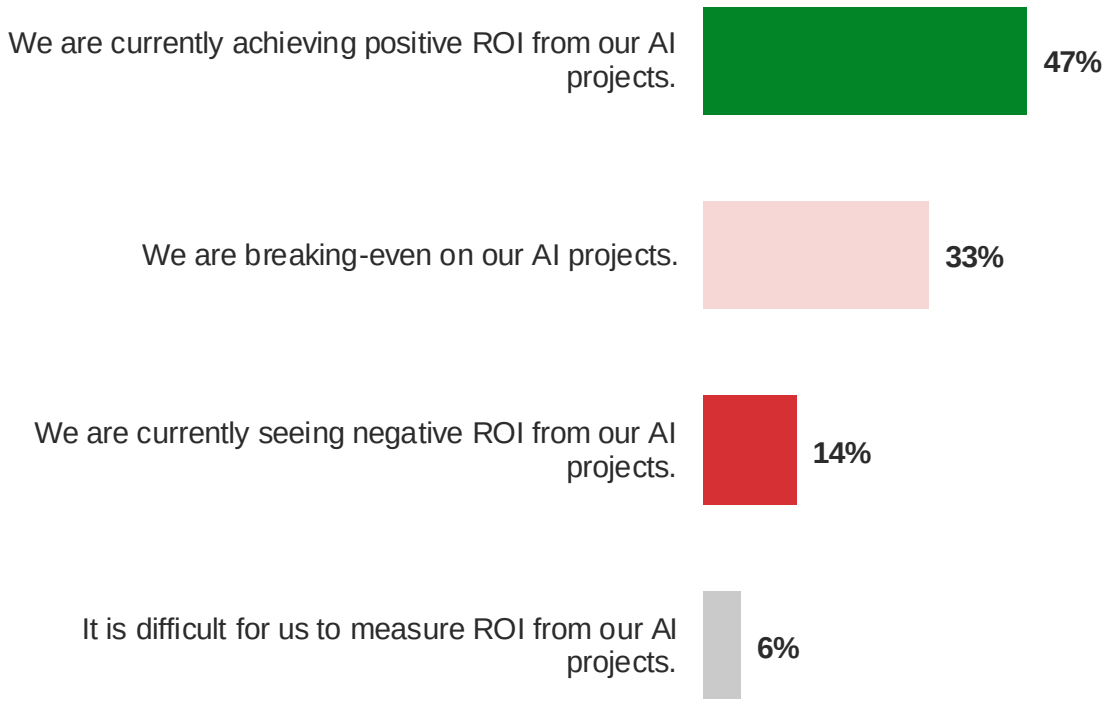
Data Deep Dive

- **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%).

IBM13 Which outcome is most important to demonstrate the success of your company's AI strategy?
Sample Size: ITDMs = 2,413

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

ROI From 2024 AI Investments
Among all ITDMs, Showing % Selected

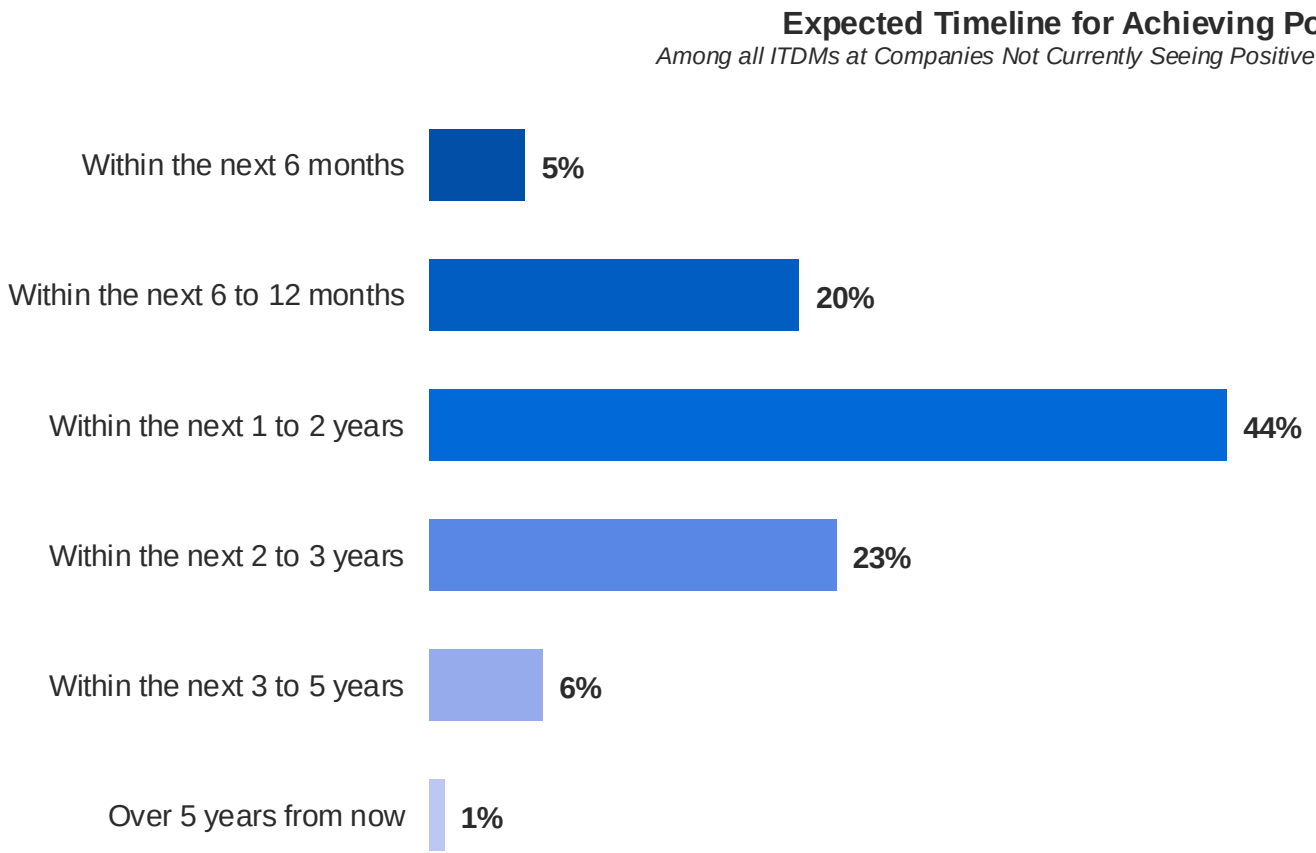


Data Deep Dive

- **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.

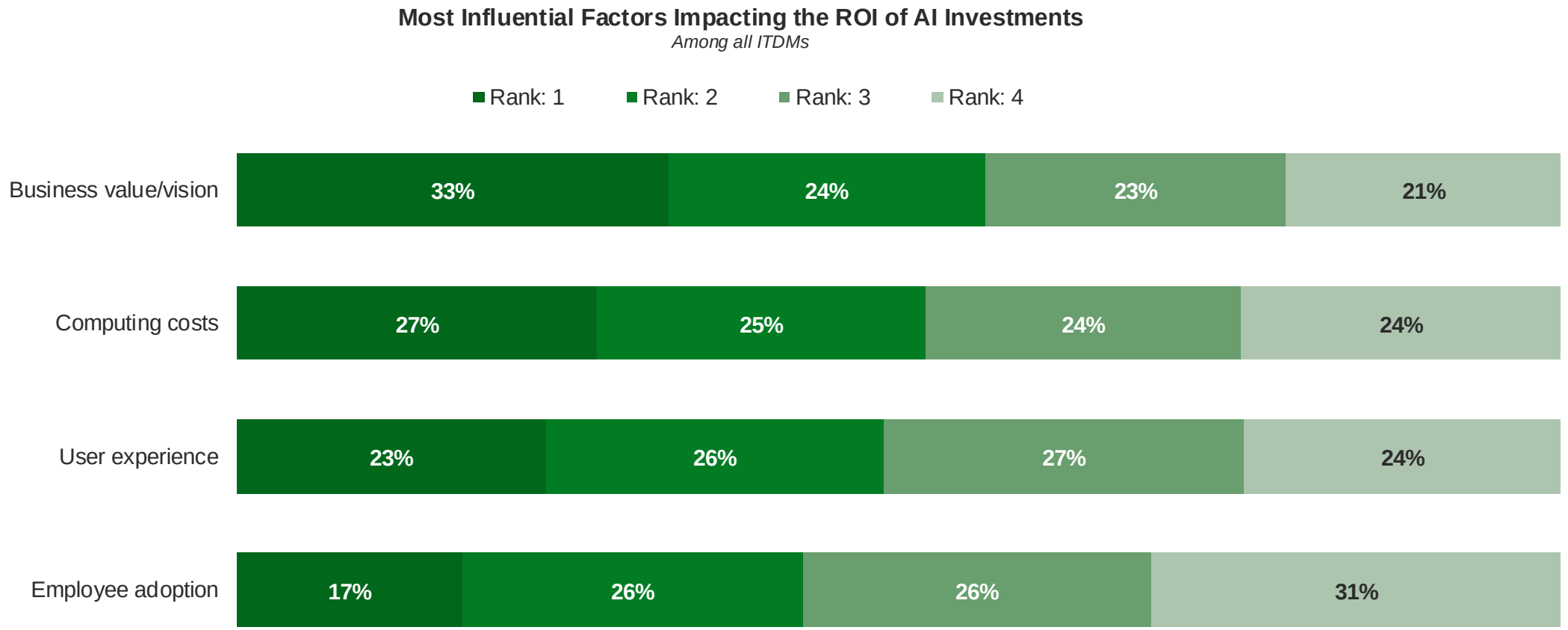
IBM14 How would you rate ROI from your company's AI investments in 2024?
Sample Size: ITDMs = 2,413

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



IBM15 When do you expect your company will see positive ROI from its AI investments?
Sample Size: ITDMs at Companies Not Currently Seeing Positive ROI from AI = 1,132

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

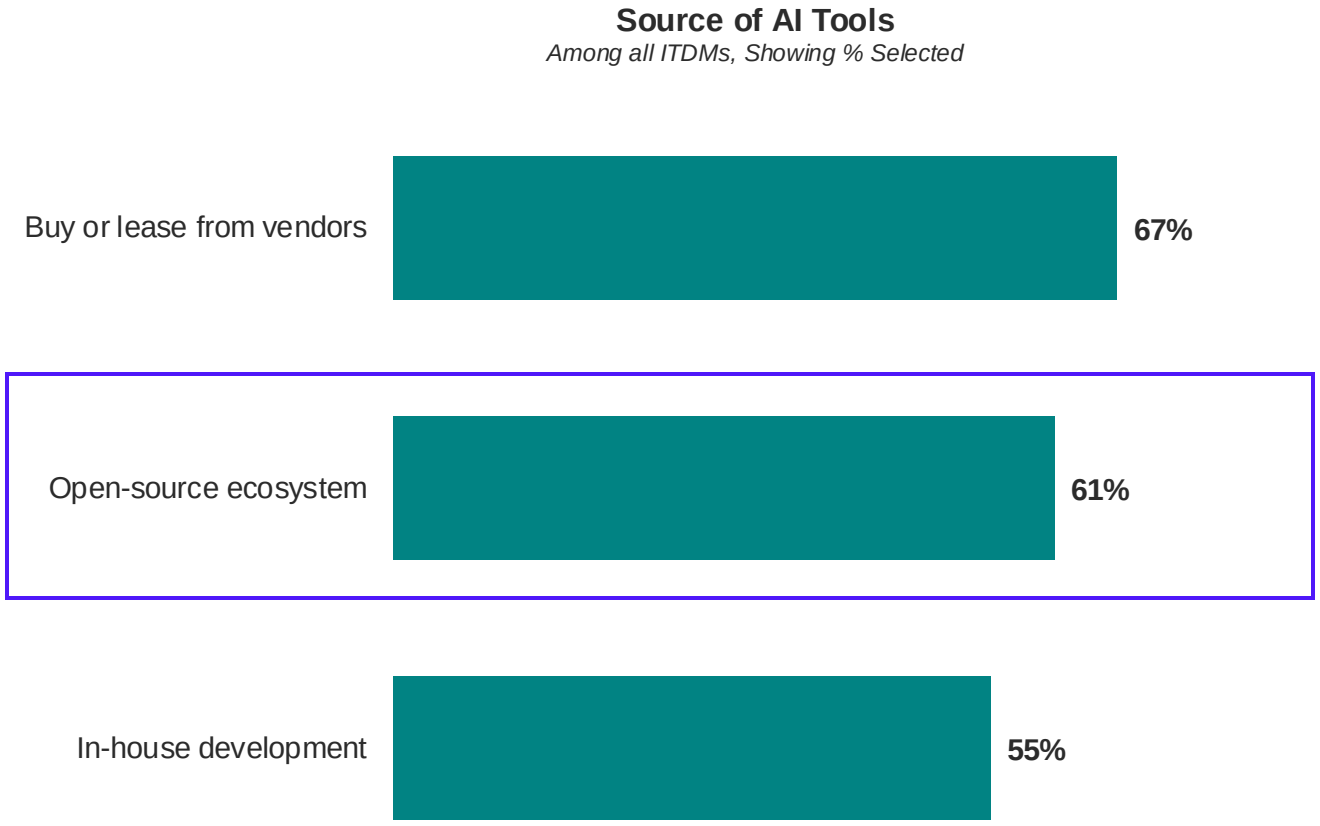


IBM16 What factors do you think most impact the ROI of your company's AI investments? Please rank the top 4 options, with 1 being the most impactful and 4 being the fourth most impactful.
Sample Size: ITDMs = 2,413

SECTION 1

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



Data Deep Dive

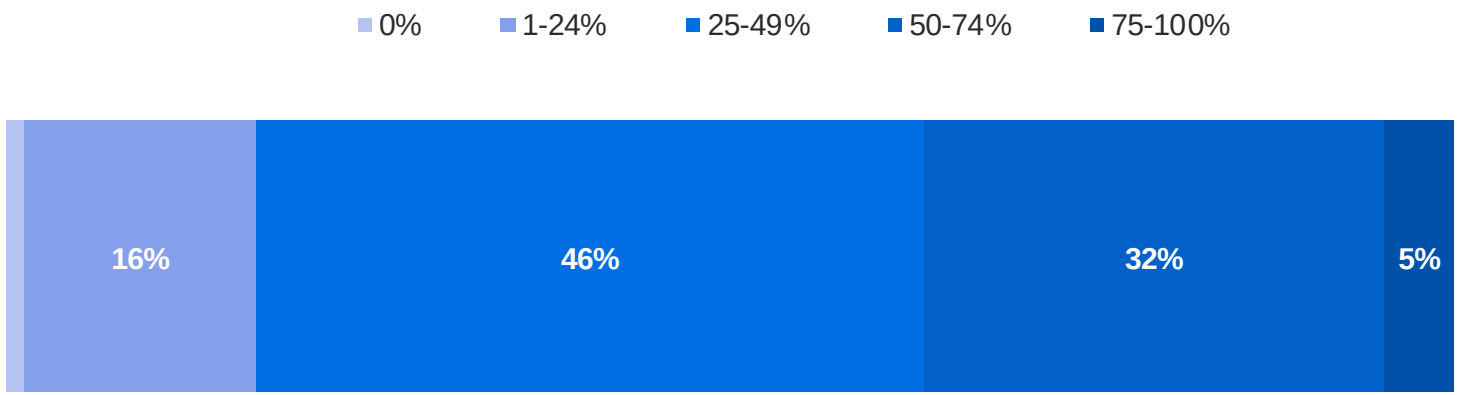
- Open-source is especially popular in Mexico (65%), Spain (66%), Indonesia (73%), South Korea (75%), and India (89%), where two-thirds or more indicate that their company is sourcing their AI tools via open-source ecosystems.

IBM6 Where does your company source your AI tools? Please select all that apply.
Sample Size: ITDMs = 2,413

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

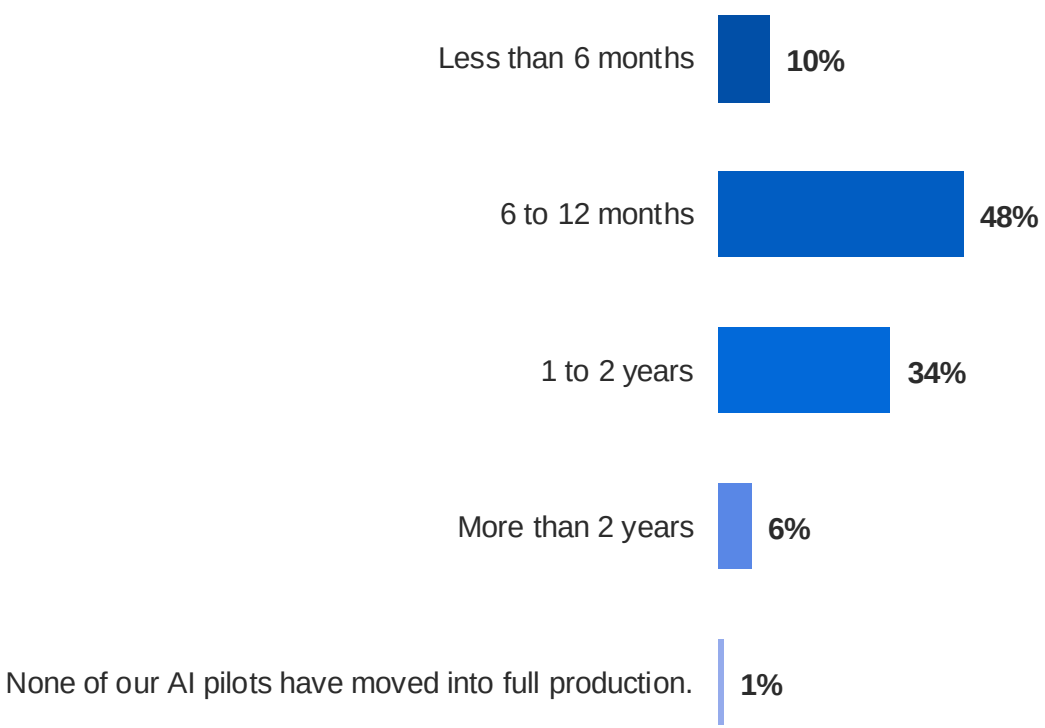
- A significant proportion (over 50%) of AI solutions at companies in Brazil (44%), India (48%), Mexico (50%), and Indonesia (56%) are based on open-source.
- As company size increases, so does the likelihood that the majority (over 50%) of AI solutions are based on open-source (101-1,000 employees =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

IBM10 What percentage of your company's current AI solutions or platforms are based on open-source?
Sample Size: ITDMs = 2,413

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



58% of ITDMs report that their company typically moves from pilot to full production **in less than a year.**

Data Deep Dive

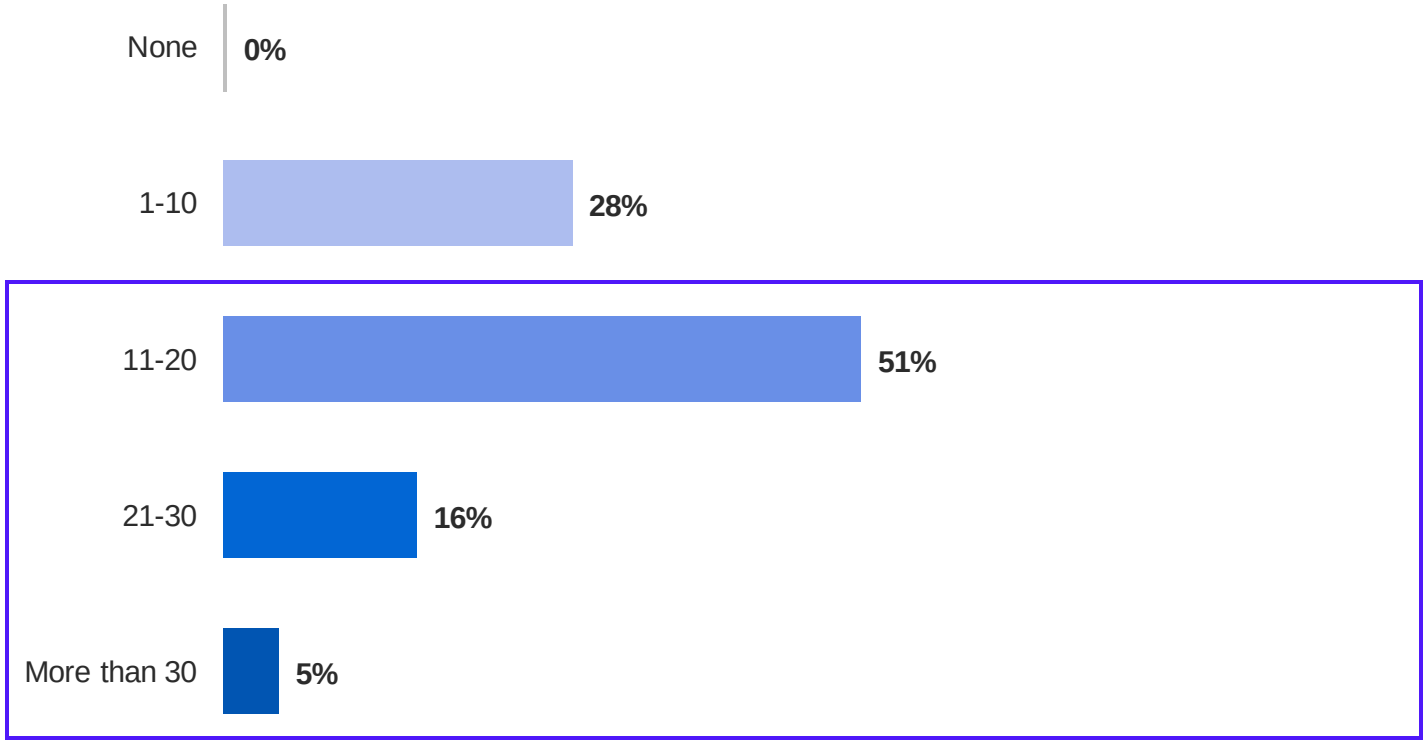
- 1 in 5 ITDMs at companies with over 5,000 employees say their company typically transitions from pilot to full production in less than 6 months, compared to only about 10% of those at smaller businesses (101-1,000 employees = 8%, 1,001-5,000 employees = 9%).

IBM4 On average, how long does it take your organization to transition from launching an AI pilot to full production?
Sample Size: ITDMs = 2,413

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

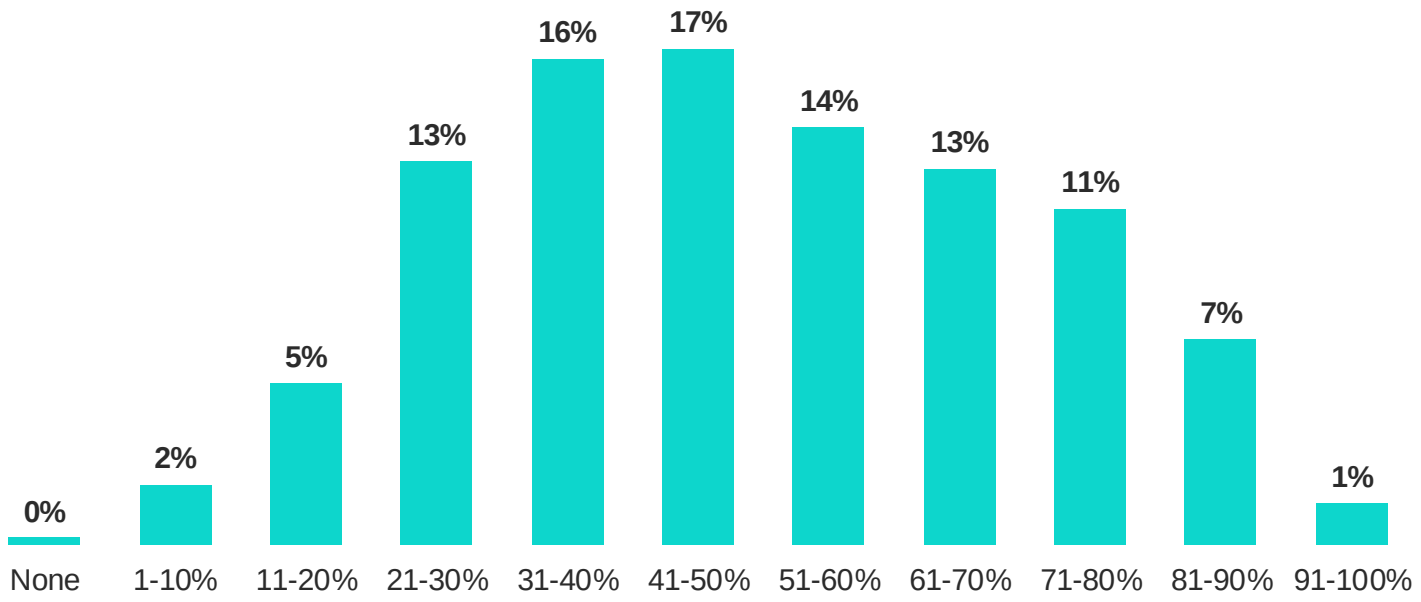
- A third or more of ITDMs in Brazil (33%), Indonesia (35%), and India (45%) will have started 21+ AI pilots in 2024.
- Large enterprises are starting AI pilots at a greater rate than smaller companies (101-1,000 employees = 14% 21+ AI pilots, 1,001-5,000 employees = 28% 21+ AI pilots, >5,000 employees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

IBM2 By the end of the year, how many AI pilots will your company have started in 2024?
Sample Size: ITDMs = 2,413

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).

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IBM3 What percentage of the AI pilots started in 2024 will have fully launched by the end of the year?
Sample Size: ITDMs at companies that have started AI pilots in 2024 = 2,393

SECTION 2

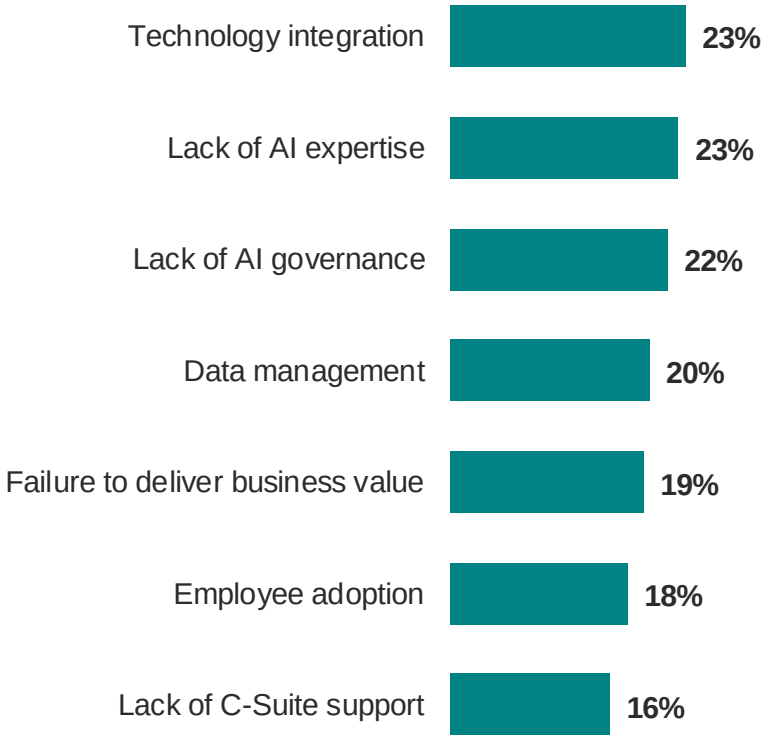
Challenges of AI Implementation

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).

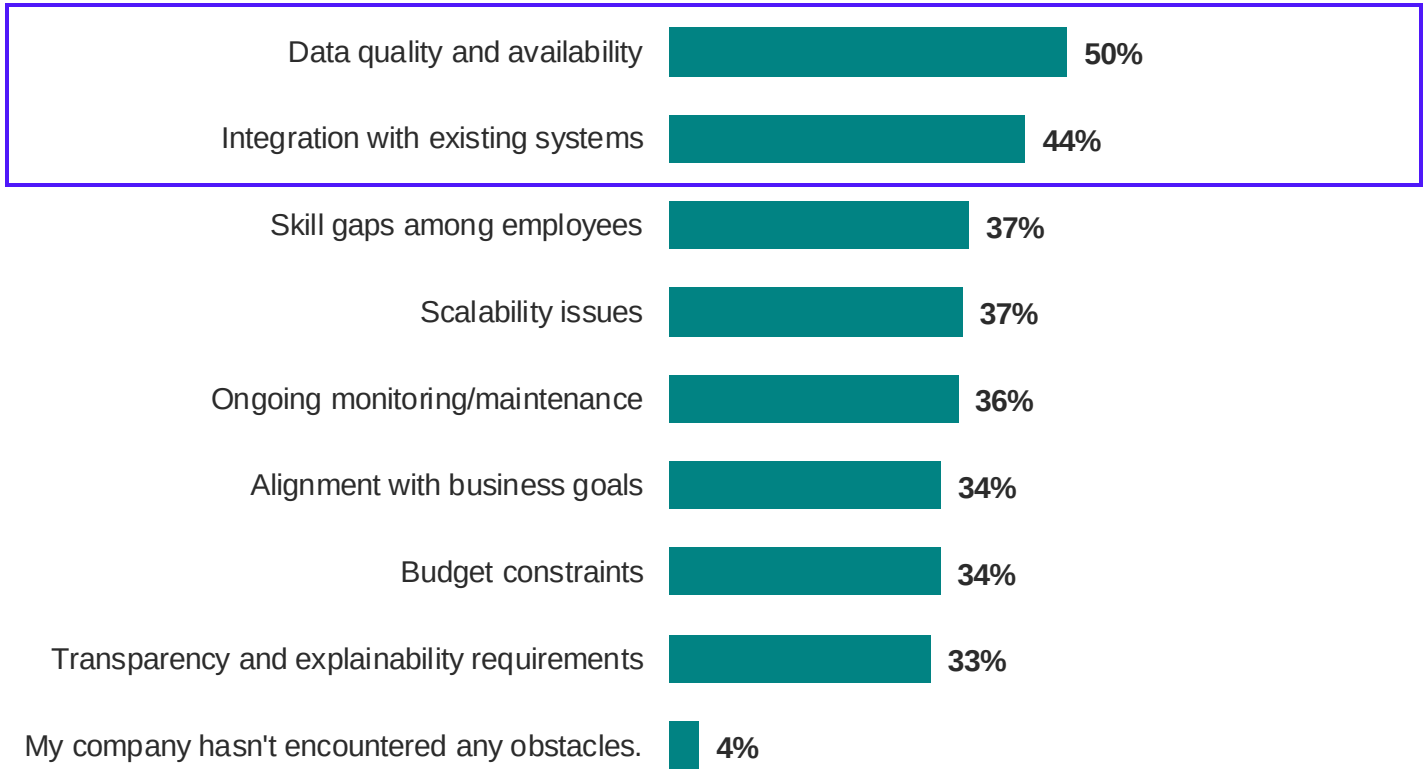
IBM7 How challenging are the following obstacles for your company when implementing AI?
Sample Size: ITDMs = 2,413

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%).

IBM5 Which of the following obstacles, if any, has your company encountered when moving AI projects from pilot to full implementation? Please select all that apply
Sample Size: ITDMs at Companies that have Launched an AI Pilot = 2,409

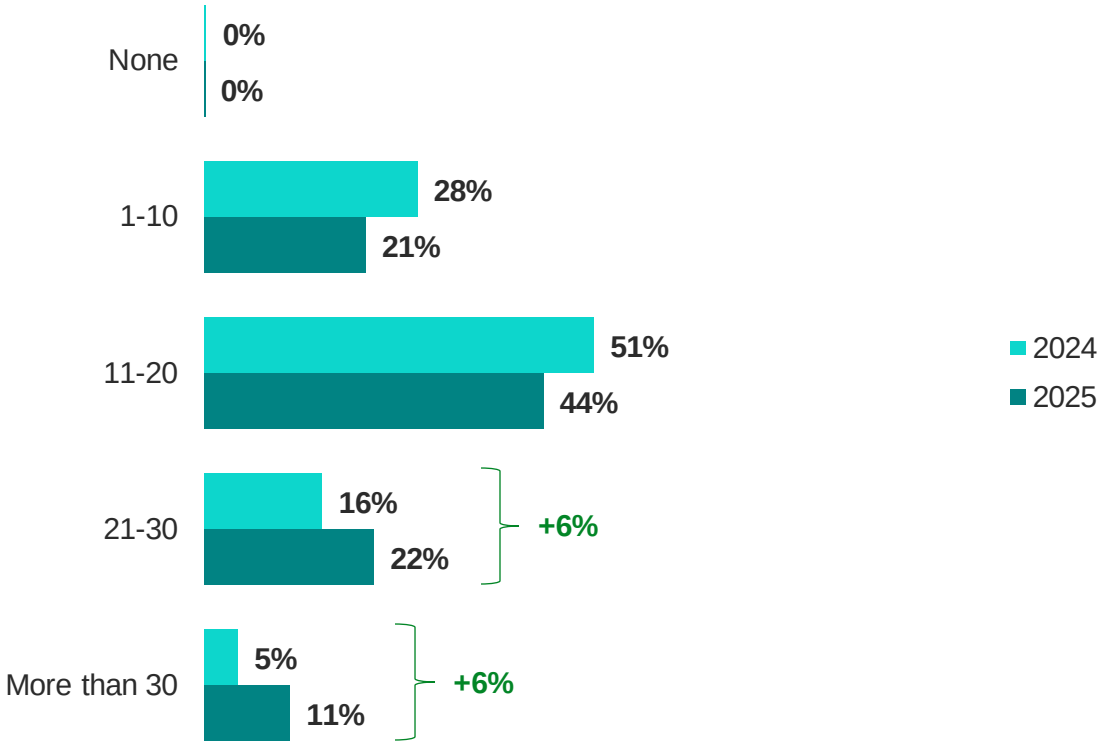
SECTION 3

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

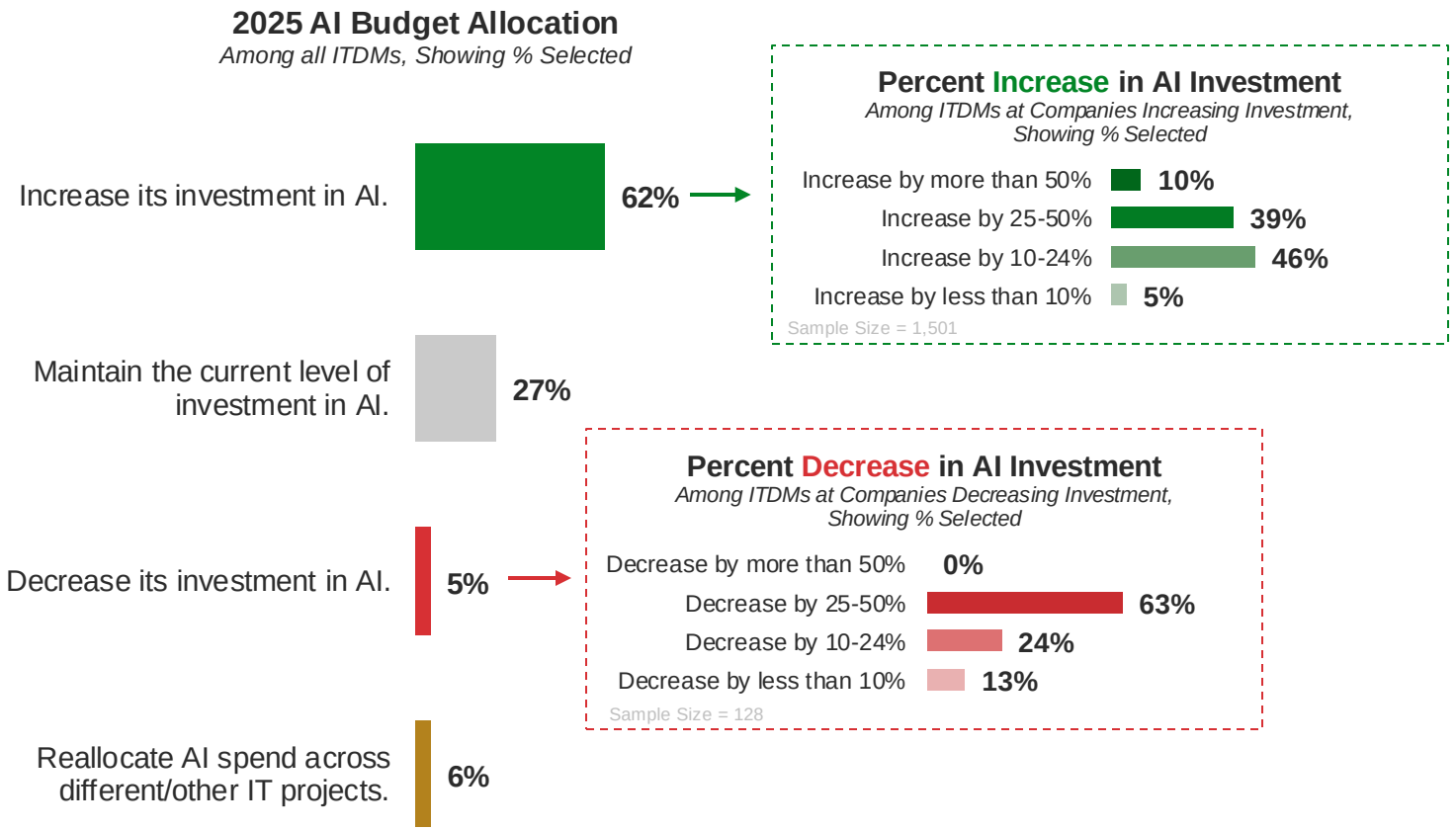


Data Deep Dive

- **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.

IBM8 How many AI pilots does your company have planned for 2025? // IBM2 By the end of the year, how many AI pilots will yourcompany have started in 2024?
Sample Size: ITDMs = 2,413

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



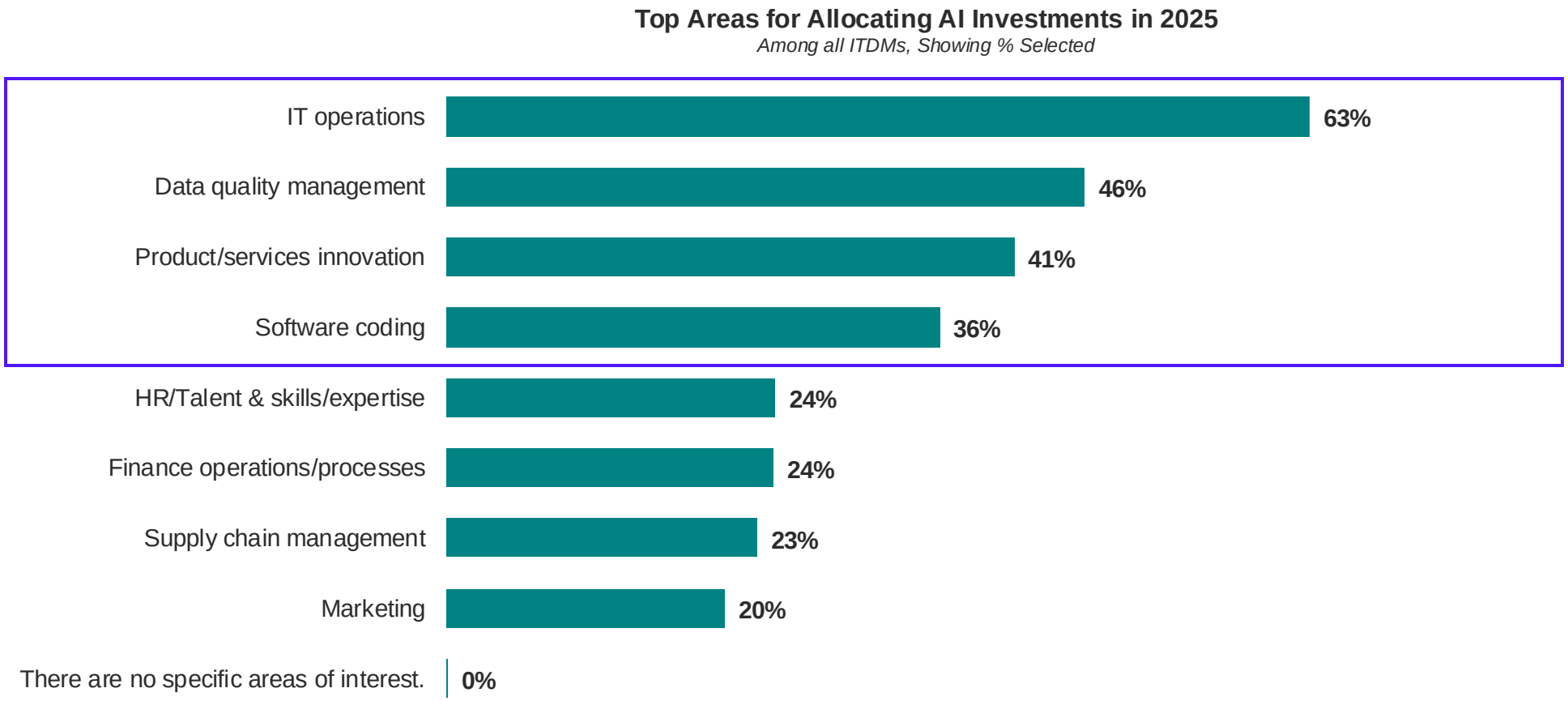
Data Deep Dive

- **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%).

IBM17 How does your company plan to allocate its AI budget in 2025? My company plans to… // IBM17a How much does your companyplan to increase its AI investment? // IBM17b How much does your company plan to decrease its AI investment?
Sample Size: ITDMs = 2,413

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



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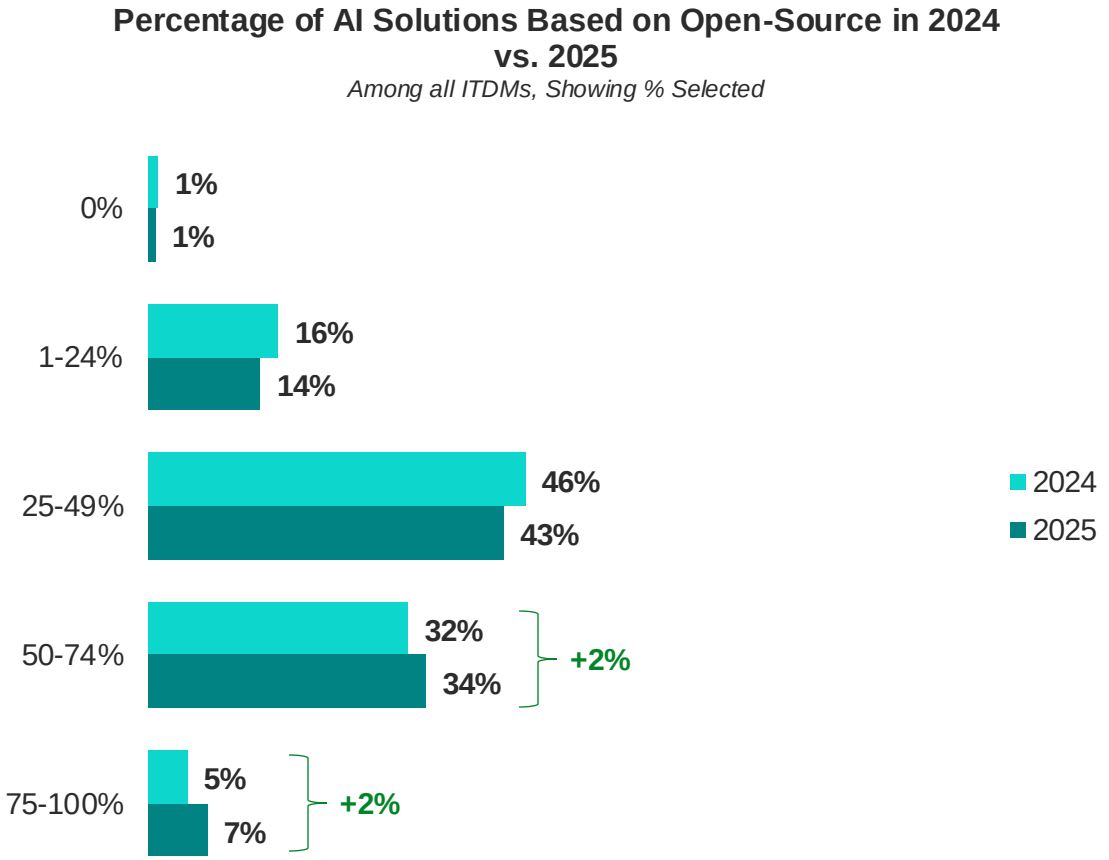
IBM18 In which areas is your company most interested in allocating its AI investments in 2025? Please select up to three options.
Sample Size: ITDMs = 2,413

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)



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.

IBM10 What percentage of your company's current AI solutions or platforms are based on open-source? // IBM20 In the next year, what percentage of your AI solutions or platforms will be based on open source?
Sample Size: ITDMs = 2,413

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).

IBM21 Which of the following strategic changes, if any, is your company planning for 2025 to optimize AI implementations? Please select all that apply.
Sample Size: ITDMs = 2,413

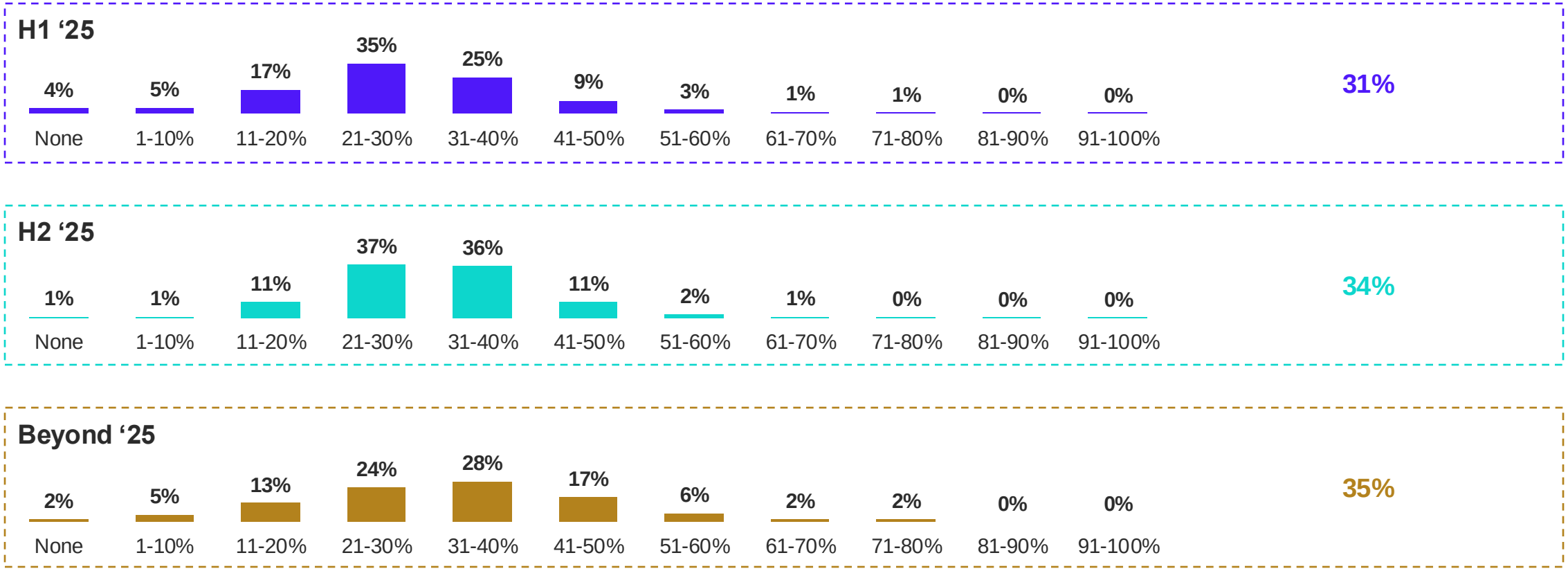
Appendix

APPENDIX

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

Projected 2025 AI Pilot Launch Timeline: H1, H2, & Beyond 2025

Among ITDMs at Companies Planning AI Pilots in 2025, Showing % Selected

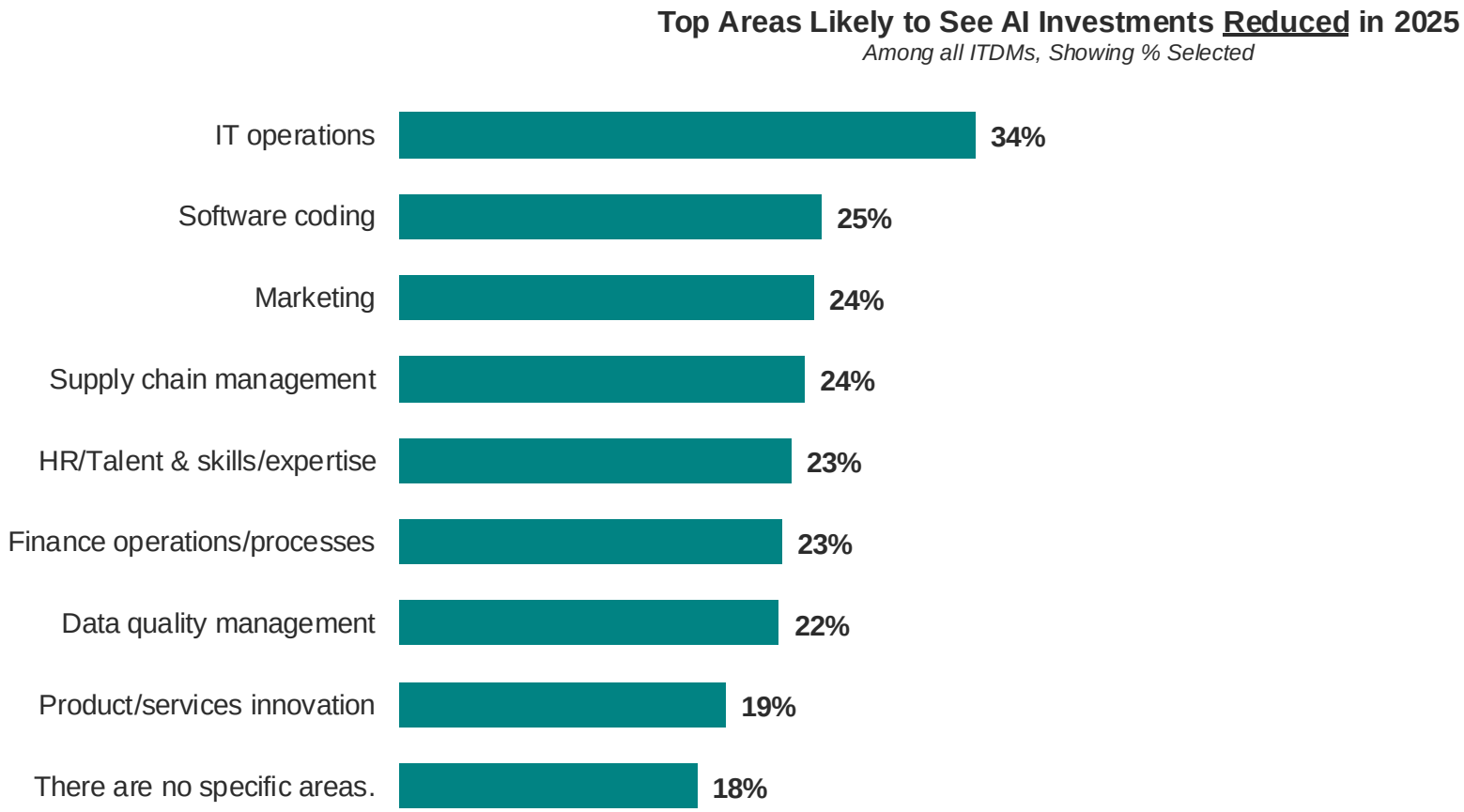


IBM9 And what percentage of these AI pilots planned for 2025 do you think will be fully launched in the following time periods? *Numeric Open End*

Sample Size: ITDMs at Companies Planning AI Pilots in 2025 = 2,396

APPENDIX

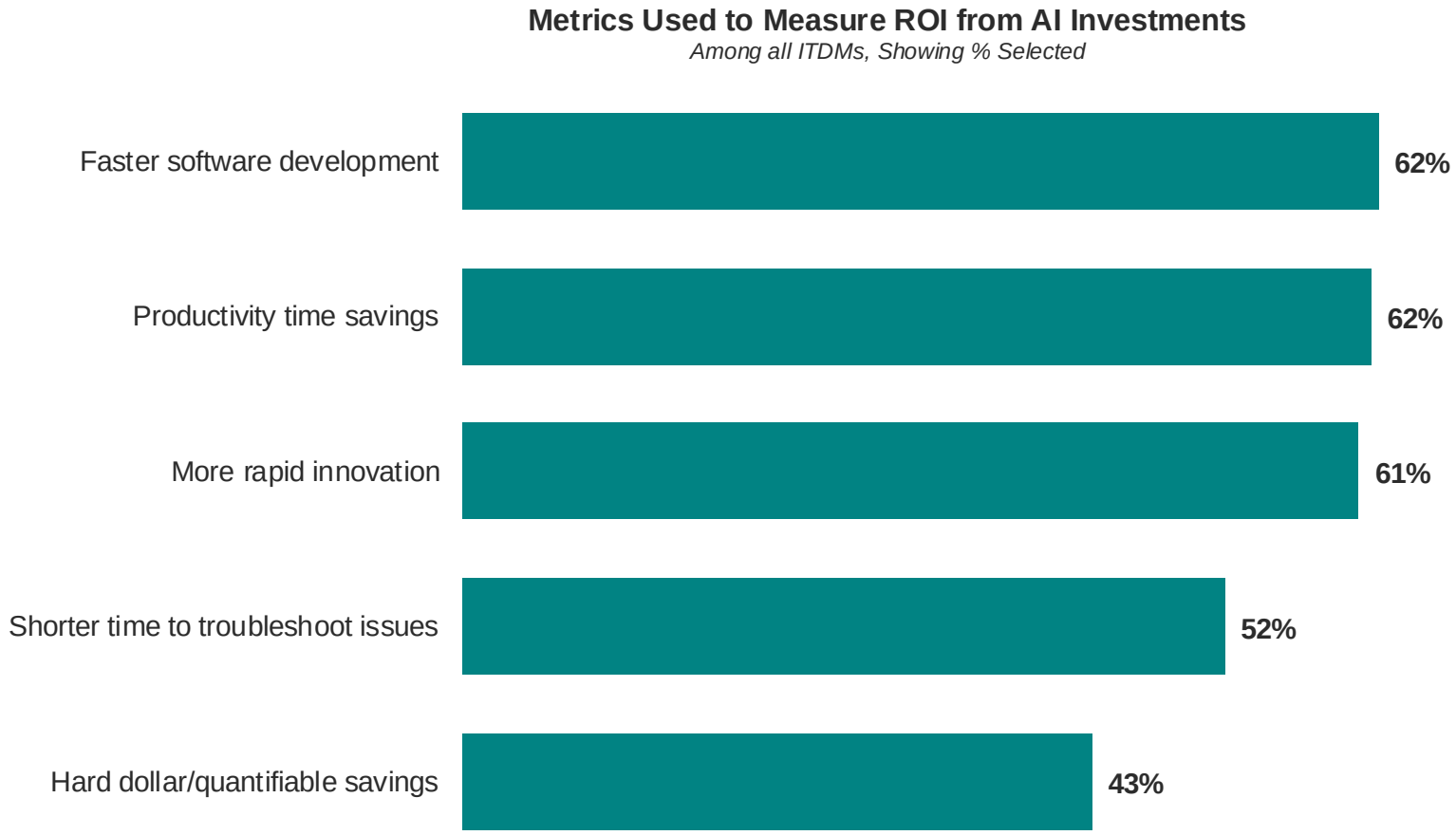
ITDMs are split on the areas their companies are likely to consider reducing AI investments



IBM19 In which areas is your company most likely to consider reducing its AI investments in 2025? Please select up to three options.
Sample Size: ITDMs = 2,413

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



IBM12 How does your company calculate return on investment (ROI) from AI investments? Please select all that apply.
Sample Size: ITDMs = 2,413

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:

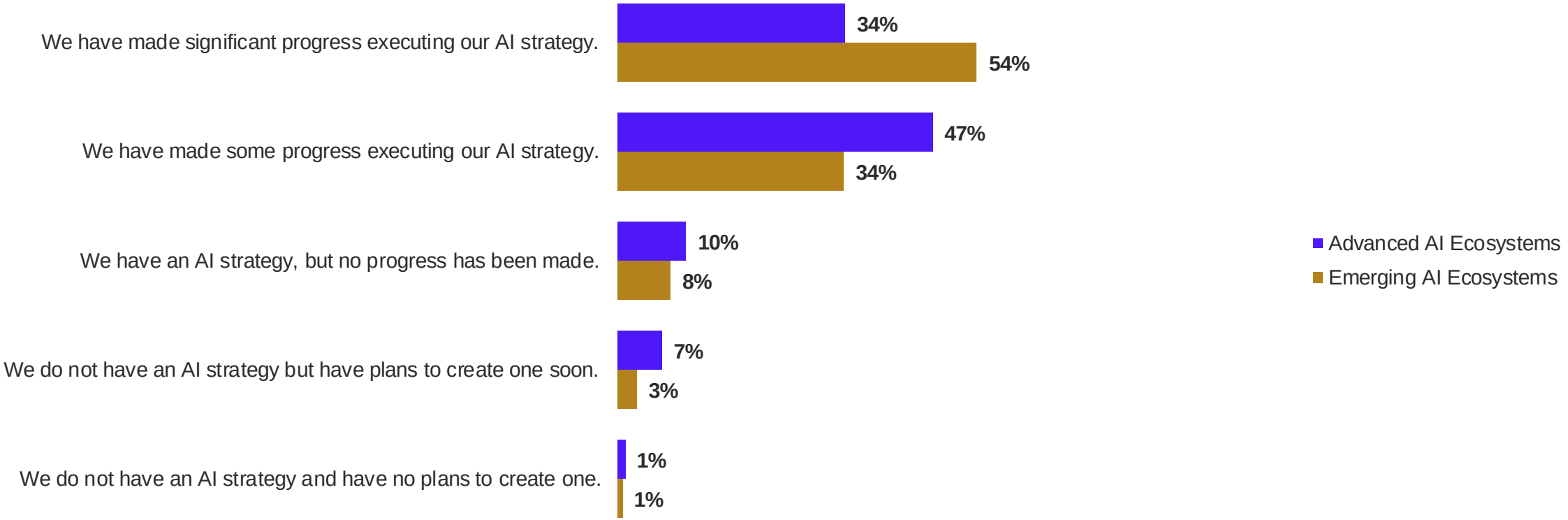
- **Group 1: Advanced AI Ecosystems**: Respondents from the US, Canada, the UK, France, Germany, Singapore, and South Korea displayed similar response patterns across multiple key questions. These markets have higher adjusted per capita income and are likely to have been working with AI for a longer 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

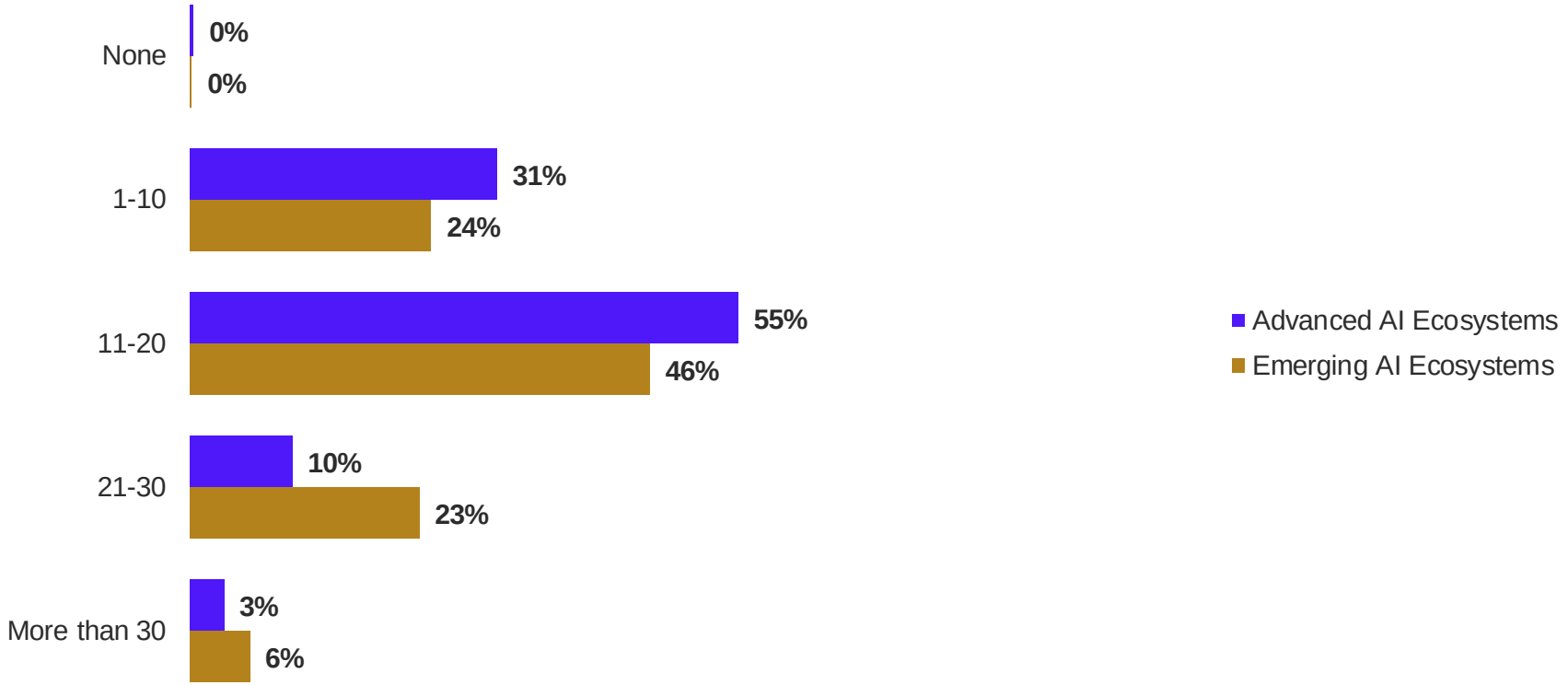


IBM1 Which of the following statements best describes your organization's AI strategy today?
Sample Size: Advanced AI Ecosystem (US, Canada, UK, France, Germany, Singapore, South Korea) = 1,407, Emerging AI Ecosystems(Mexico, Spain, Brazil, India, Indonesia) = 1,006

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

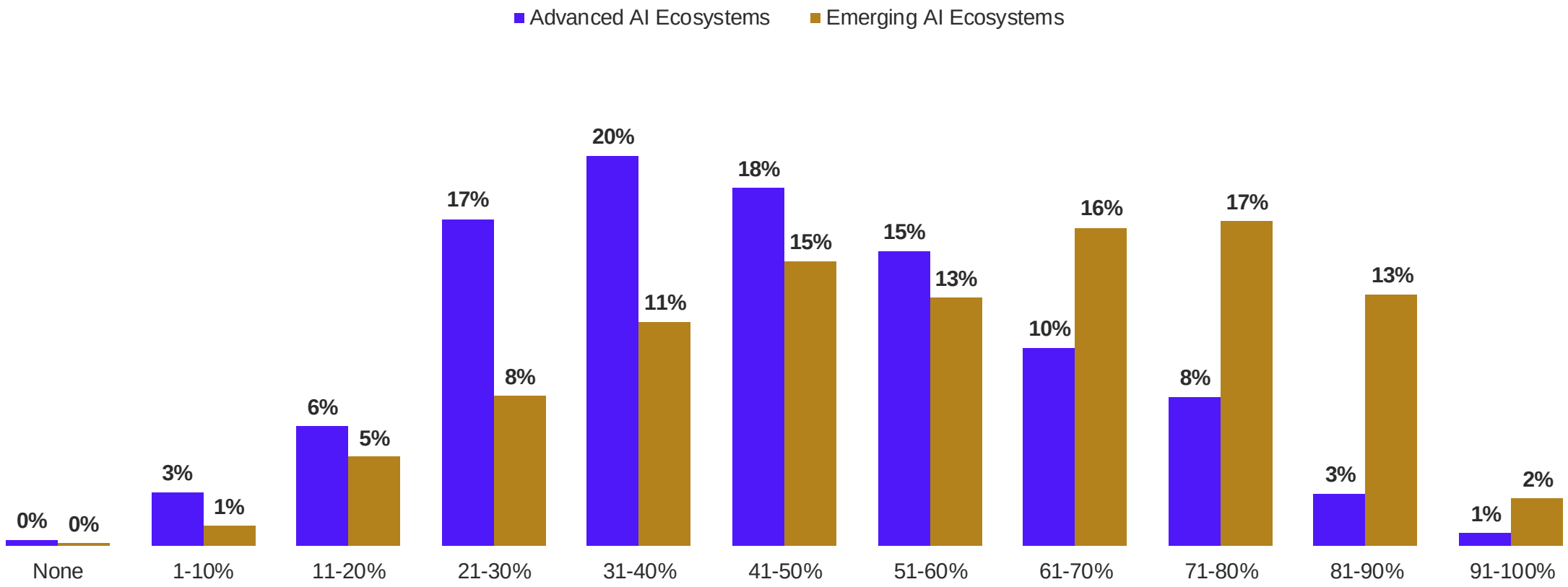


IBM2 By the end of the year, how many AI pilots will your company have started in 2024?
Sample Size: Advanced AI Ecosystem (US, Canada, UK, France, Germany, Singapore, South Korea) = 1,407, Emerging AI Ecosystems(Mexico, Spain, Brazil, India, Indonesia) = 1,006

APPENDIX: ADVANCED VS. EMERGING AI ECOSYSTEM MARKETS

Percentage of 2024 AI Pilots Fully Launched in 2024

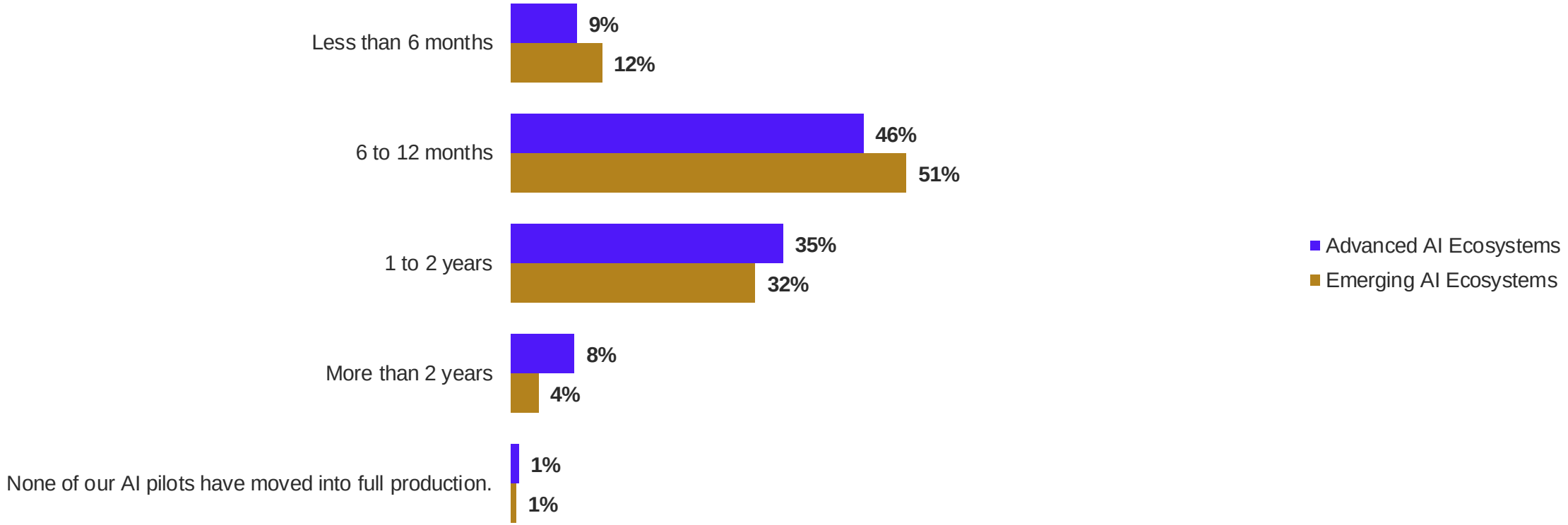
Among ITDMs at Companies that have started AI Pilots in 2024 in Advanced vs. Emerging AI Ecosystem Markets, Showing % Selected



IBM3 What percentage of the AI pilots started in 2024 will have fully launched by the end of the year?
Sample Size: Advanced AI Ecosystem (US, Canada, UK, France, Germany, Singapore, South Korea) = 1,396, Emerging AI Ecosystems(Mexico, Spain, Brazil, India, Indonesia) = 997

Average Length of Time to Transition From Pilot to Full Production

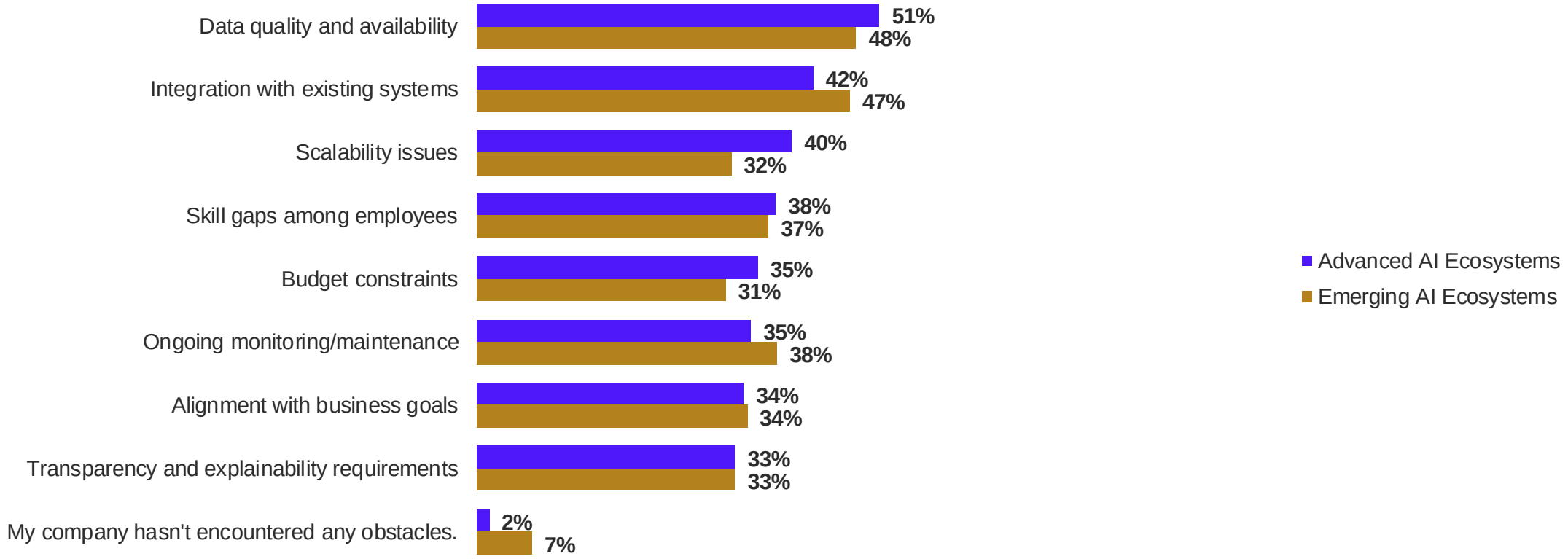
Among ITDMs in Advanced vs. Emerging AI Ecosystem Markets, Showing % Selected



IBM4 On average, how long does it take your organization to transition from launching an AI pilot to full production?
Sample Size: Advanced AI Ecosystem (US, Canada, UK, France, Germany, Singapore, South Korea) = 1,407, Emerging AI Ecosystems(Mexico, Spain, Brazil, India, Indonesia) = 1,006

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

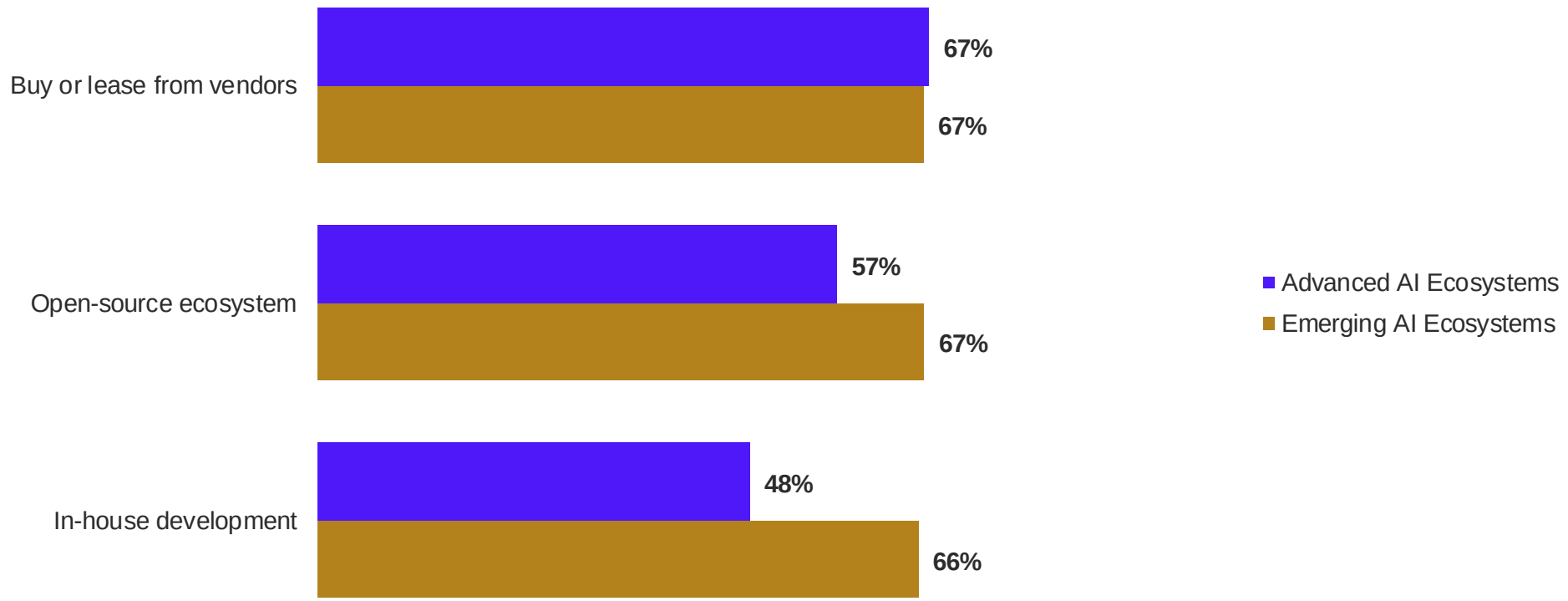


IBM5 Which of the following obstacles, if any, has your company encountered when moving AI projects from pilot to full implementation? Please select all that apply.
Sample Size: Advanced AI Ecosystem (US, Canada, UK, France, Germany, Singapore, South Korea) = 1,404, Emerging AI Ecosystems(Mexico, Spain, Brazil, India, Indonesia) = 1,005

APPENDIX: ADVANCED VS. EMERGING AI ECOSYSTEM MARKETS

Source of AI Tools

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

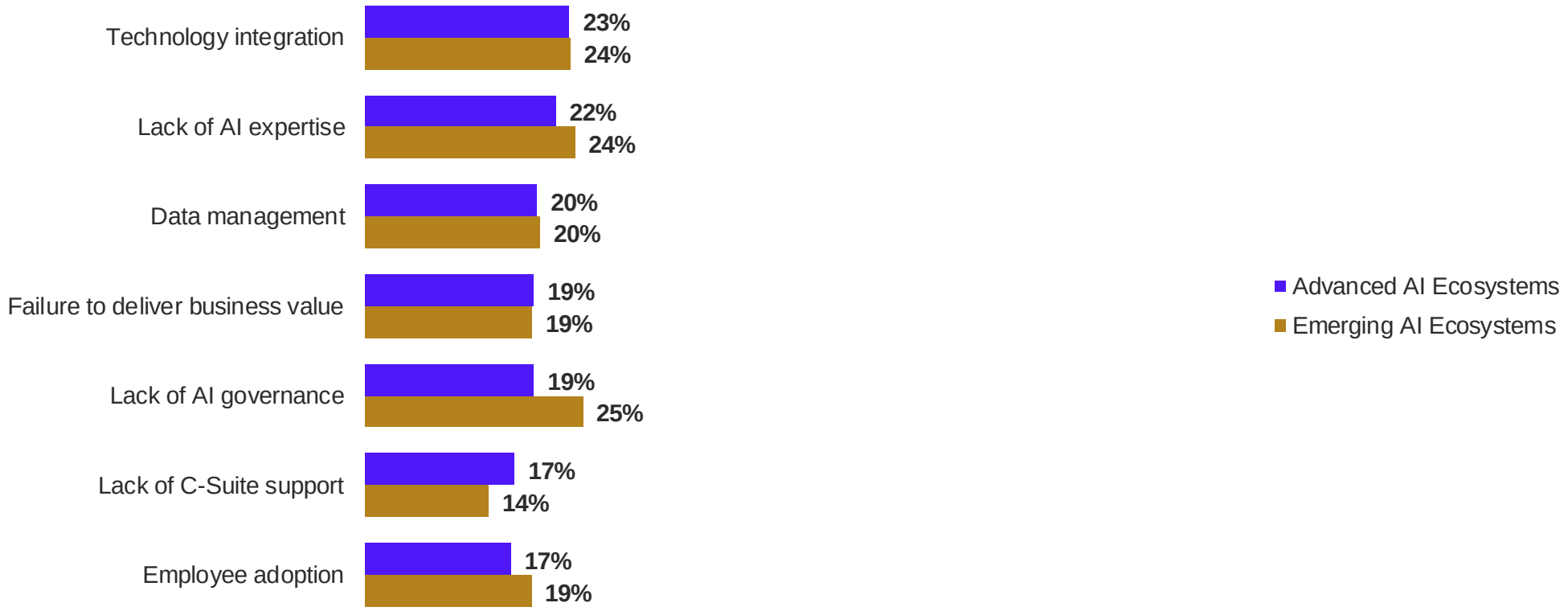


IBM6 Where does your company source your AI tools?
Sample Size: Advanced AI Ecosystem (US, Canada, UK, France, Germany, Singapore, South Korea) = 1,407, Emerging AI Ecosystems(Mexico, Spain, Brazil, India, Indonesia) = 1,006

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'

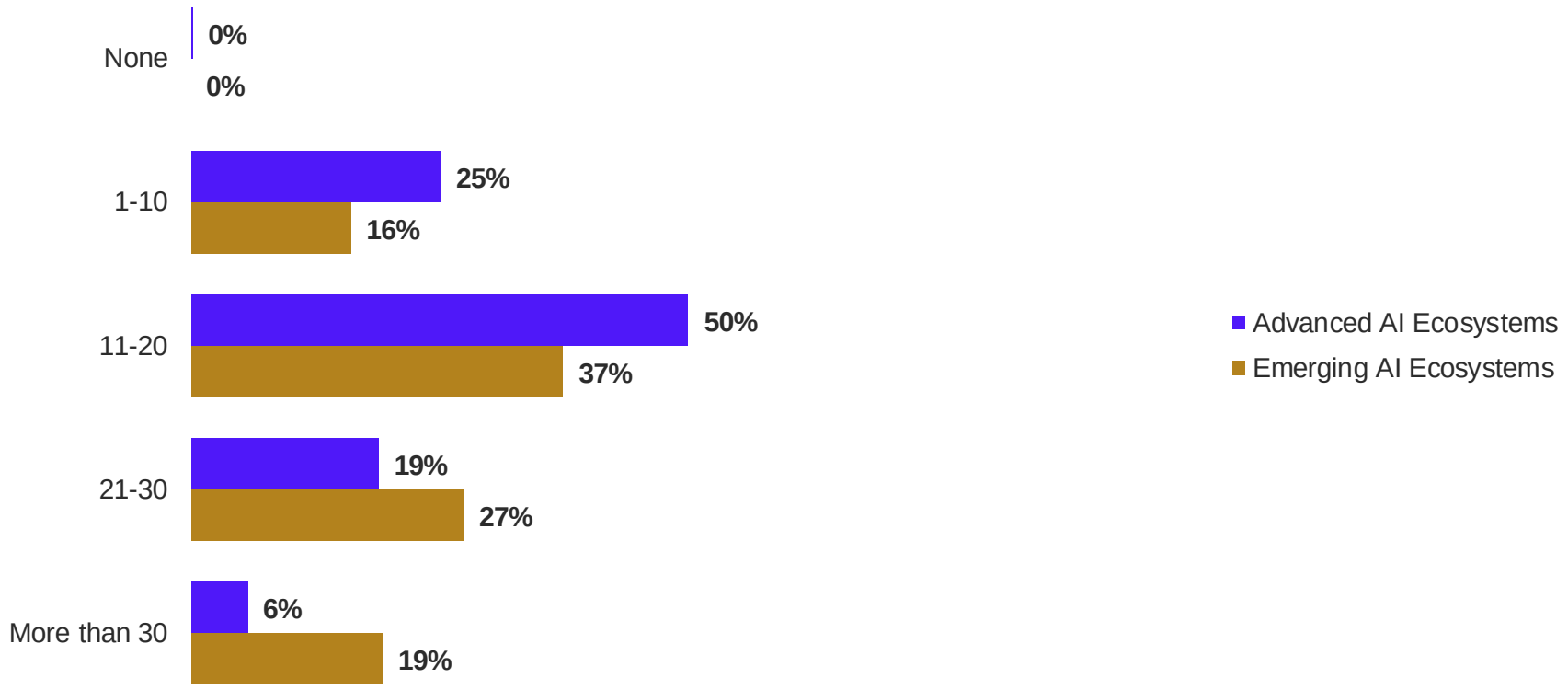


IBM7 How challenging are the following obstacles for your company when implementing AI?
Sample Size: Advanced AI Ecosystem (US, Canada, UK, France, Germany, Singapore, South Korea) = 1,407, Emerging AI Ecosystems(Mexico, Spain, Brazil, India, Indonesia) = 1,006

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

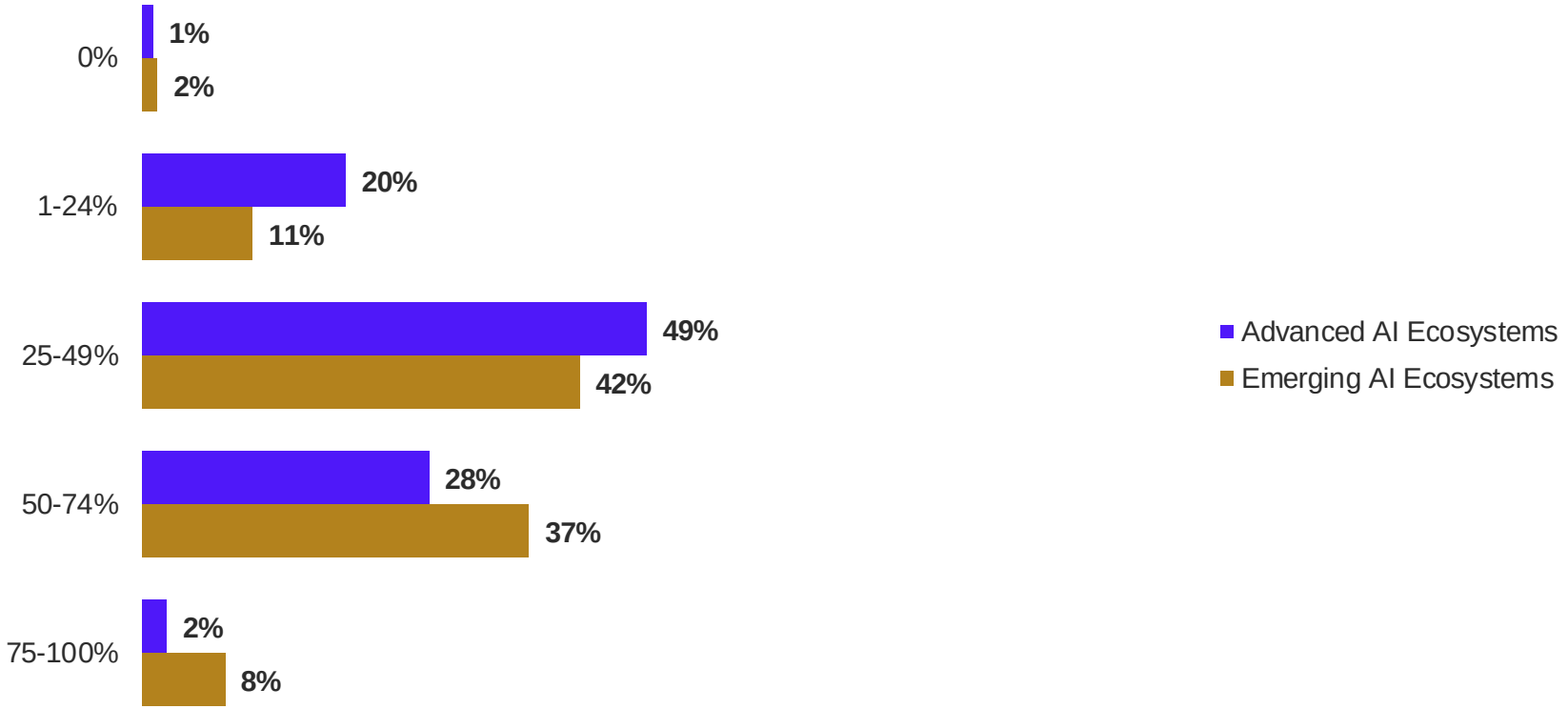


IBM8 How many AI pilots does your company have planned for 2025?
Sample Size: Advanced AI Ecosystem (US, Canada, UK, France, Germany, Singapore, South Korea) = 1,407, Emerging AI Ecosystems(Mexico, Spain, Brazil, India, Indonesia) = 1,006

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

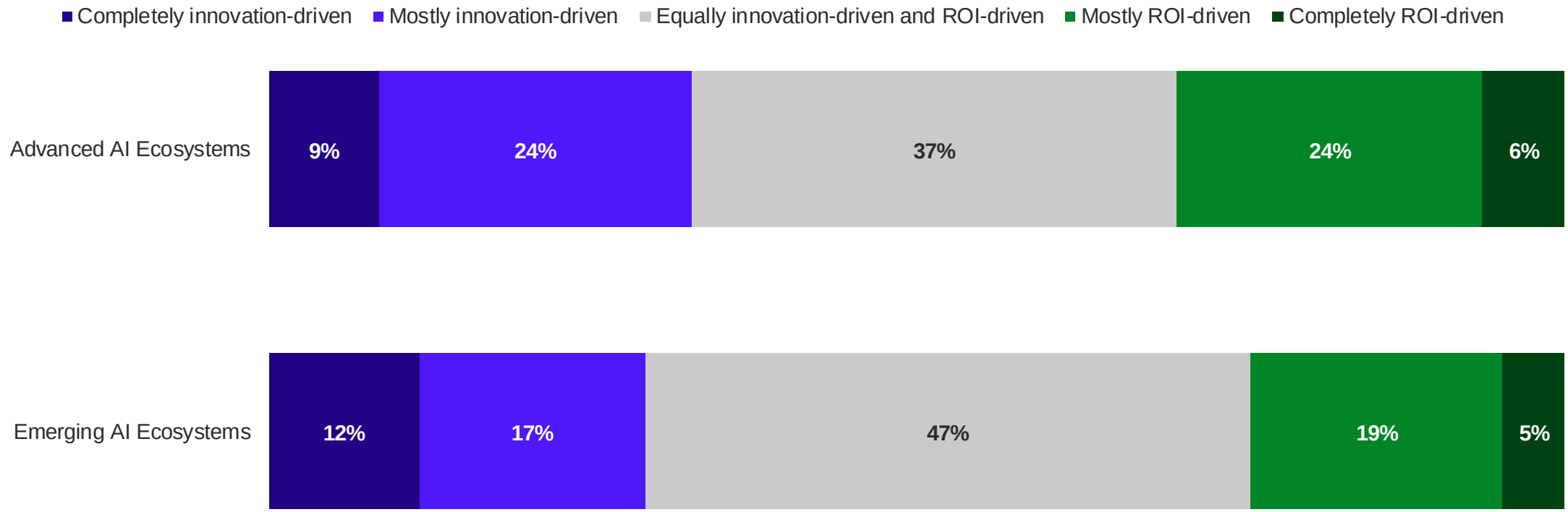


IBM10 What percentage of your company's current AI solutions or platforms are based on open-source?
Sample Size: Advanced AI Ecosystem (US, Canada, UK, France, Germany, Singapore, South Korea) = 1,407, Emerging AI Ecosystems(Mexico, Spain, Brazil, India, Indonesia) = 1,006

APPENDIX: ADVANCED VS. EMERGING AI ECOSYSTEM MARKETS

Motivations Driving AI Implementation

Among ITDMs in Advanced vs. Emerging AI Ecosystem Markets

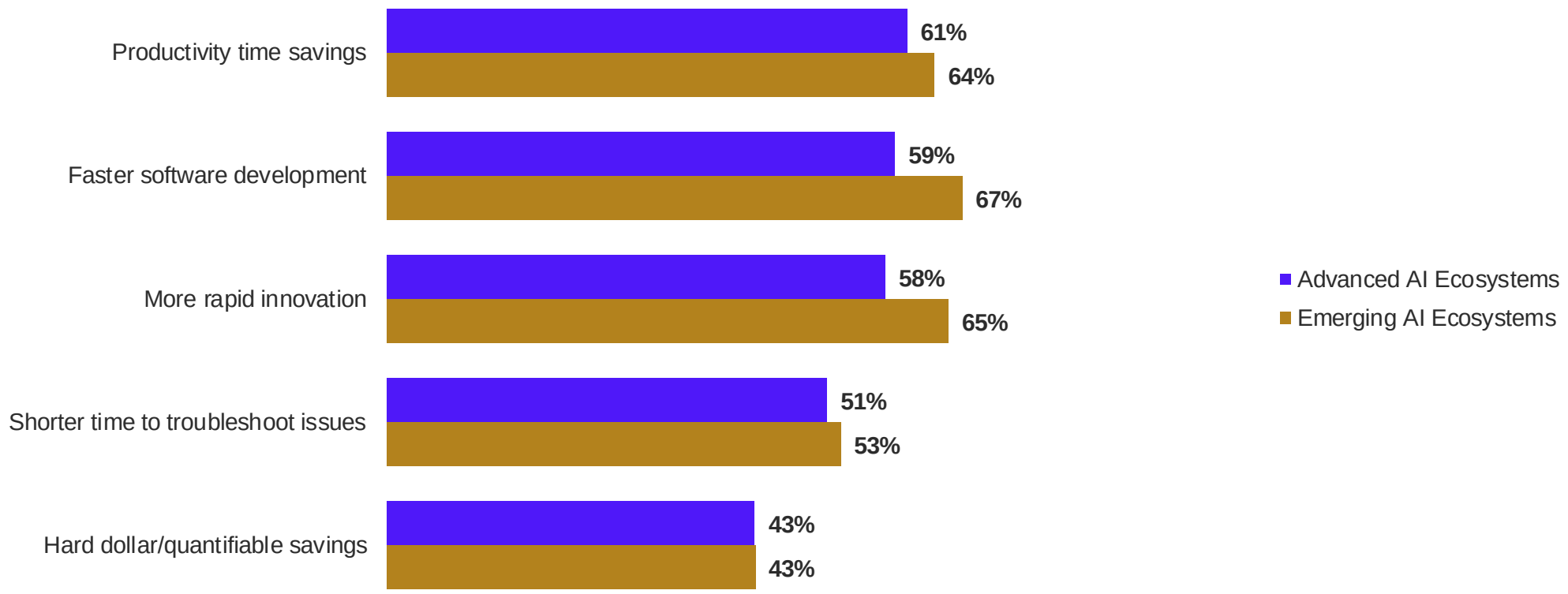


IBM11 What is the primary motivation driving AI implementation at your company?
Sample Size: Advanced AI Ecosystem (US, Canada, UK, France, Germany, Singapore, South Korea) = 1,407, Emerging AI Ecosystems(Mexico, Spain, Brazil, India, Indonesia) = 1,006

APPENDIX: ADVANCED VS. EMERGING AI ECOSYSTEM MARKETS

Metrics Used to Measure ROI from AI Investments

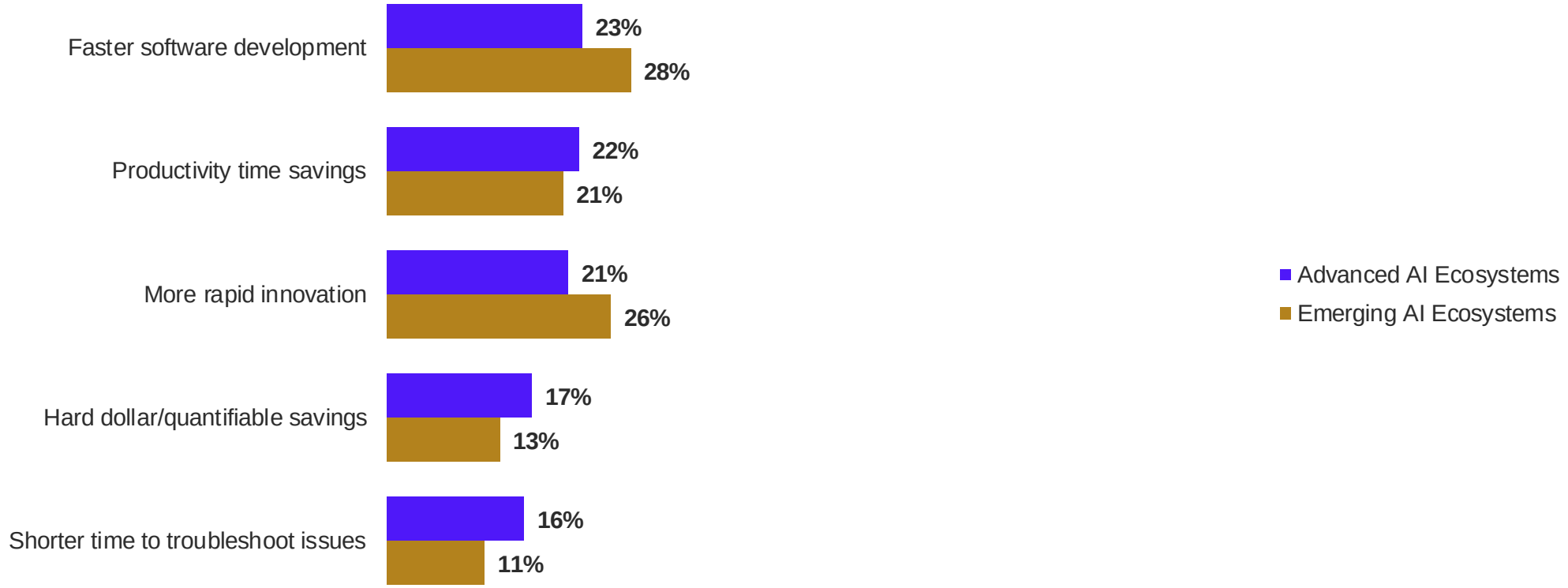
Among ITDMs in Advanced vs. Emerging AI Ecosystem Markets, Showing % Selected



IBM12 How does your company calculate return on investment (ROI) from AI investments? Please select all that apply.
Sample Size: Advanced AI Ecosystem (US, Canada, UK, France, Germany, Singapore, South Korea) = 1,407, Emerging AI Ecosystems(Mexico, Spain, Brazil, India, Indonesia) = 1,006

Most Important Metric When Calculating ROI from AI Investments

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

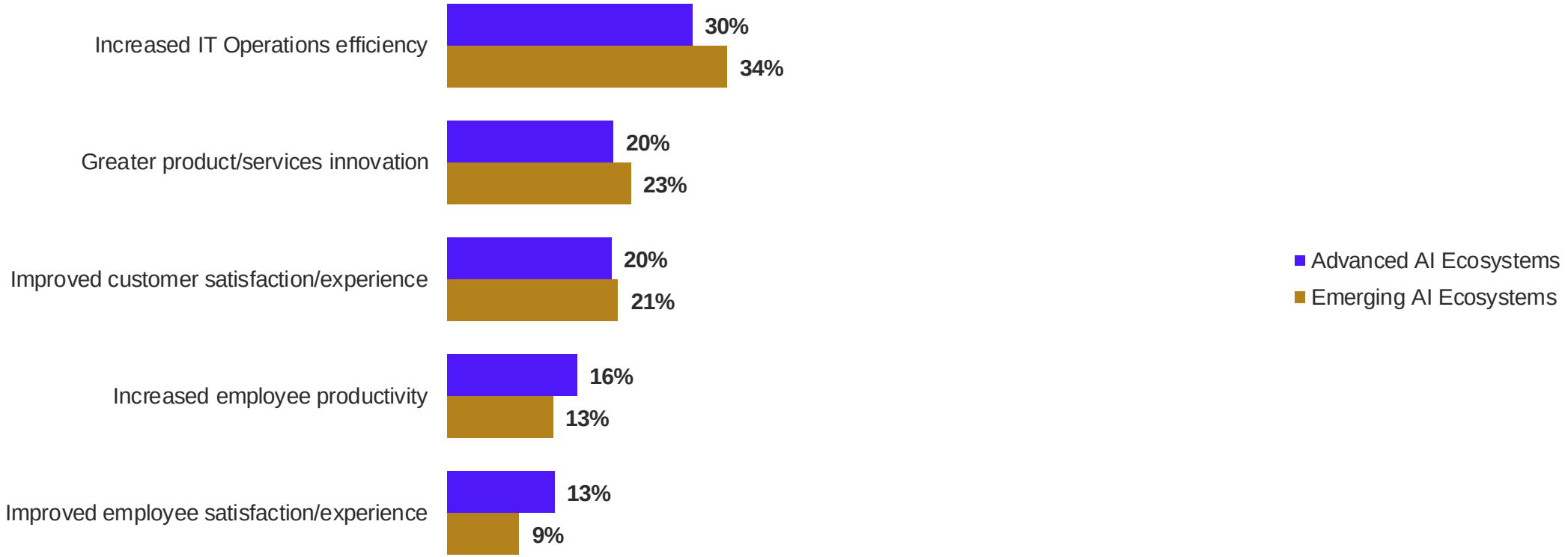


IBM12a Which of these metrics is most important to your company when measuring ROI from AI investments?
Sample Size: Advanced AI Ecosystem (US, Canada, UK, France, Germany, Singapore, South Korea) = 1,407, Emerging AI Ecosystems(Mexico, Spain, Brazil, India, Indonesia) = 1,006

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

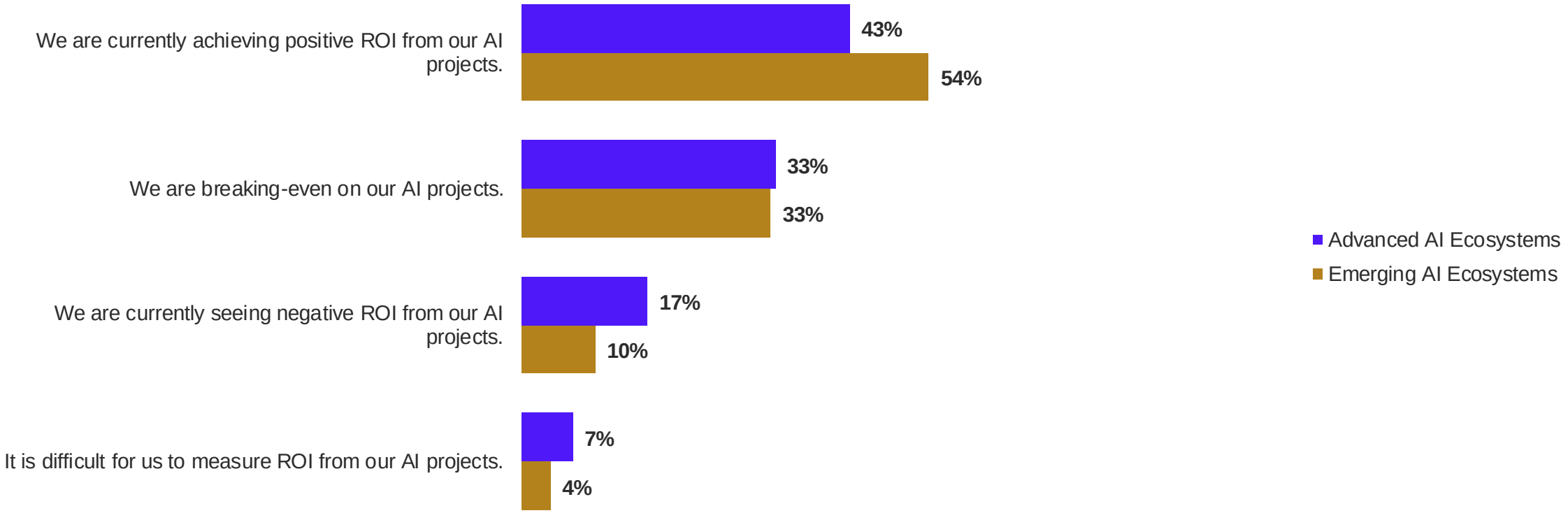


IBM13 Which outcome is most important to demonstrate the success of your company's AI strategy?
Sample Size: Advanced AI Ecosystem (US, Canada, UK, France, Germany, Singapore, South Korea) = 1,407, Emerging AI Ecosystems(Mexico, Spain, Brazil, India, Indonesia) = 1,006

APPENDIX: ADVANCED VS. EMERGING AI ECOSYSTEM MARKETS

ROI From 2024 AI Investments

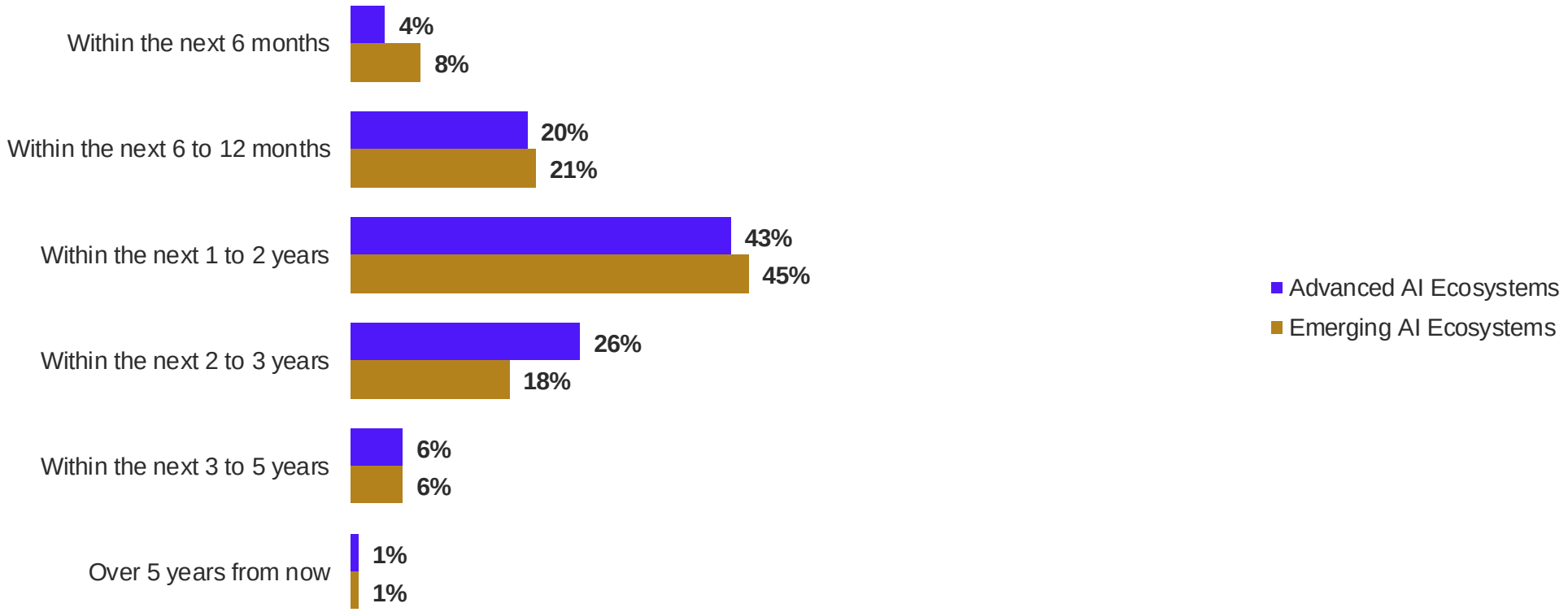
Among ITDMs in Advanced vs. Emerging AI Ecosystem Markets, Showing % Selected



IBM14 How would you rate ROI from your company's AI investments in 2024?
Sample Size: Advanced AI Ecosystem (US, Canada, UK, France, Germany, Singapore, South Korea) = 1,407, Emerging AI Ecosystems(Mexico, Spain, Brazil, India, Indonesia) = 1,006

Expected Timeline for Achieving Positive ROI

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

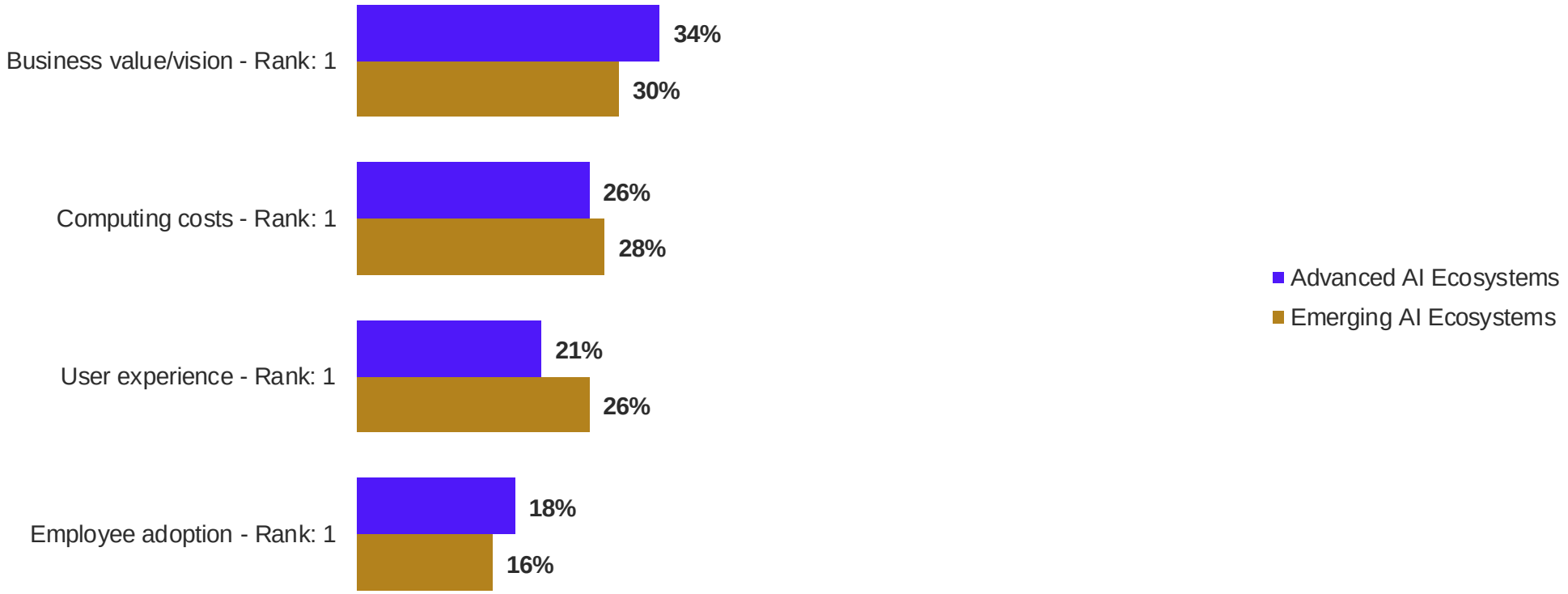


IBM15 When do you expect your company will see positive ROI from its AI investments?
Sample Size: Advanced AI Ecosystem (US, Canada, UK, France, Germany, Singapore, South Korea) = 704, Emerging AI Ecosystems(Mexico, Spain, Brazil, India, Indonesia) = 428

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

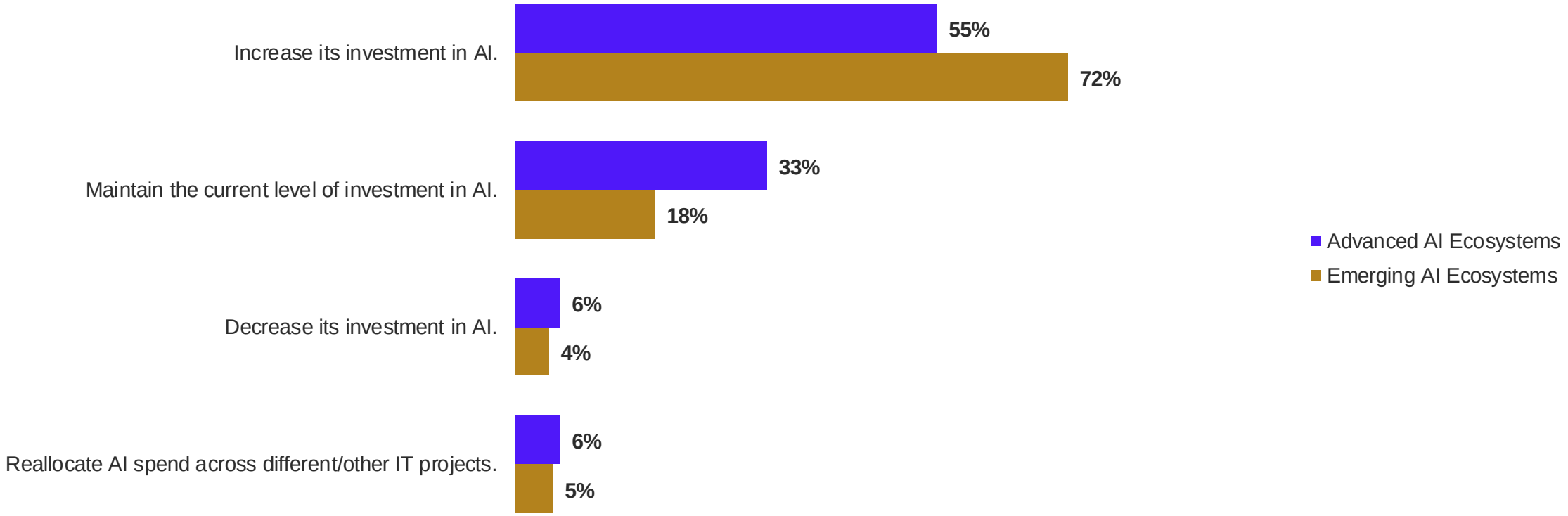


IBM16 What factors do you think most impact the ROI of your company's AI investments? Please rank the top 4 options, with 1 being the most impactful and 4 being the fourth most impactful.
Sample Size: Advanced AI Ecosystem (US, Canada, UK, France, Germany, Singapore, South Korea) = 1,407, Emerging AI Ecosystems(Mexico, Spain, Brazil, India, Indonesia) = 1,006

APPENDIX: ADVANCED VS. EMERGING AI ECOSYSTEM MARKETS

2025 AI Budget Allocation

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

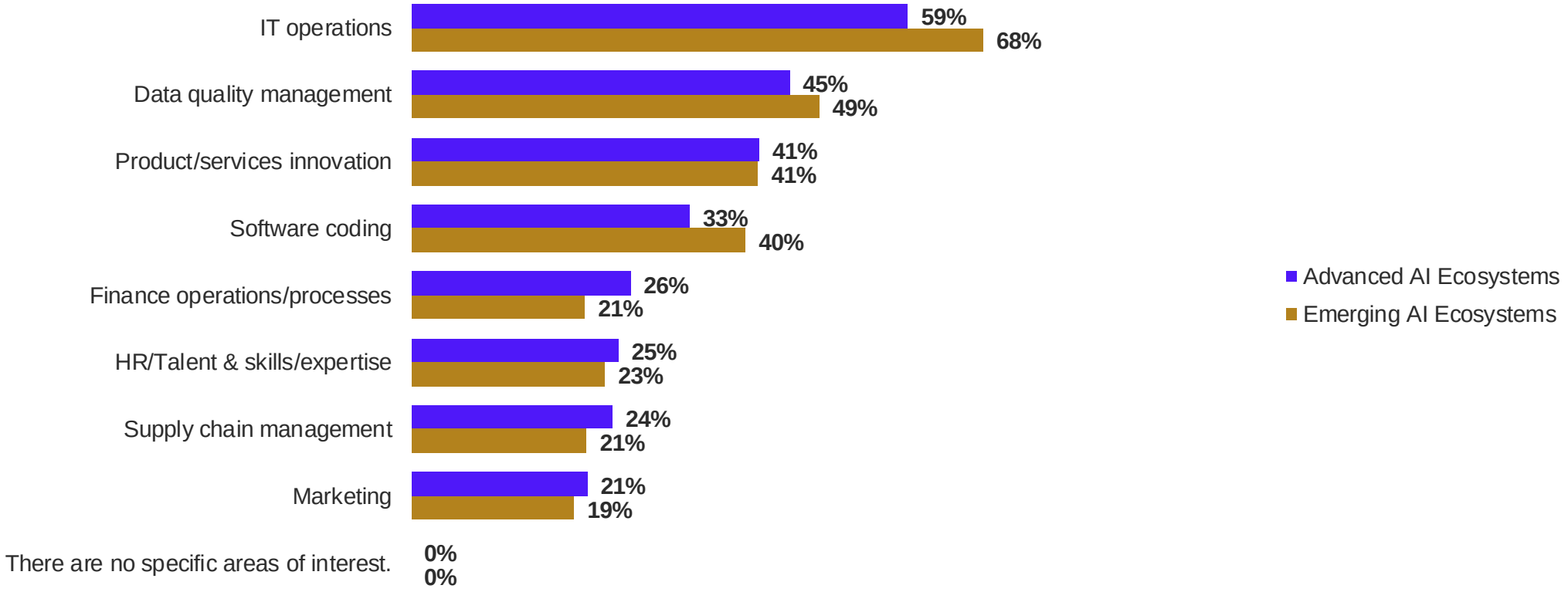


IBM17 How does your company plan to allocate its AI budget in 2025? My company plans to…
Sample Size: Advanced AI Ecosystem (US, Canada, UK, France, Germany, Singapore, South Korea) = 1,407, Emerging AI Ecosystems(Mexico, Spain, Brazil, India, Indonesia) = 1,006

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

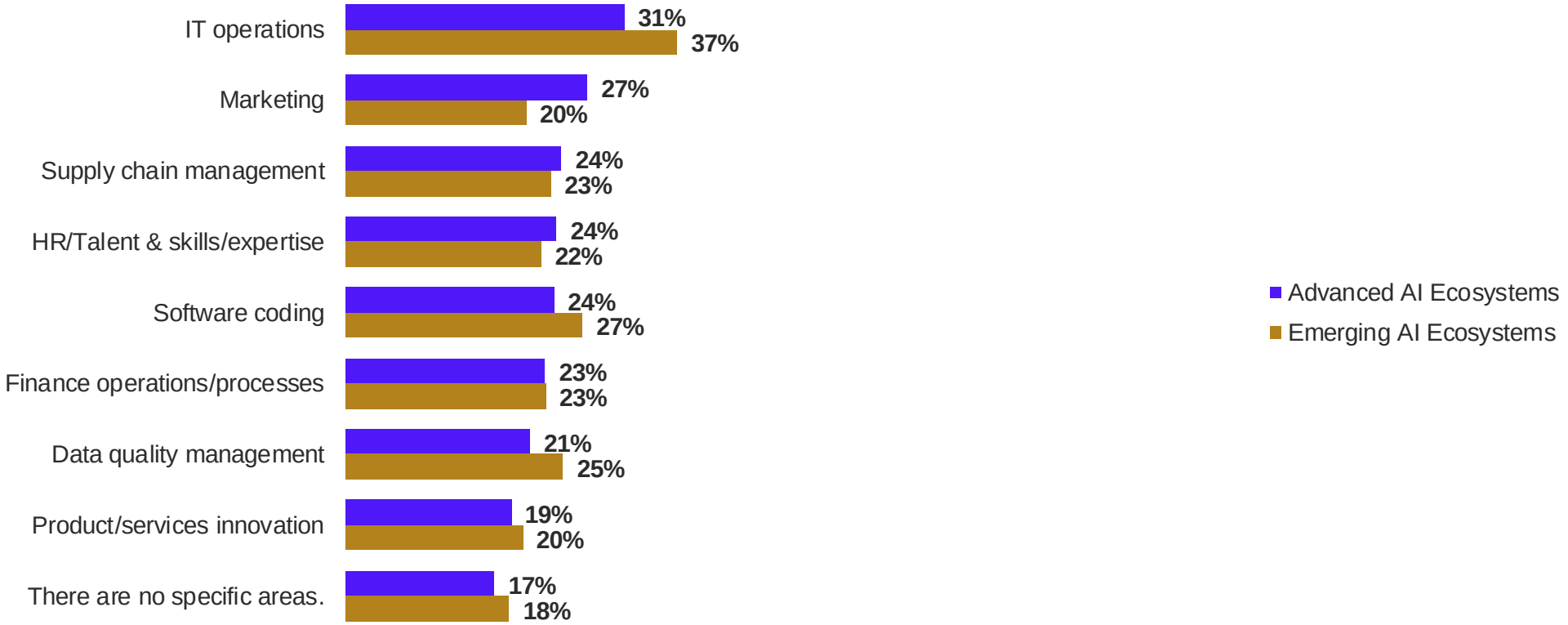


IBM18 In which areas is your company most interested in allocating its AI investments in 2025? Please select up to three options.
Sample Size: Advanced AI Ecosystem (US, Canada, UK, France, Germany, Singapore, South Korea) = 1,407, Emerging AI Ecosystems(Mexico, Spain, Brazil, India, Indonesia) = 1,006

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

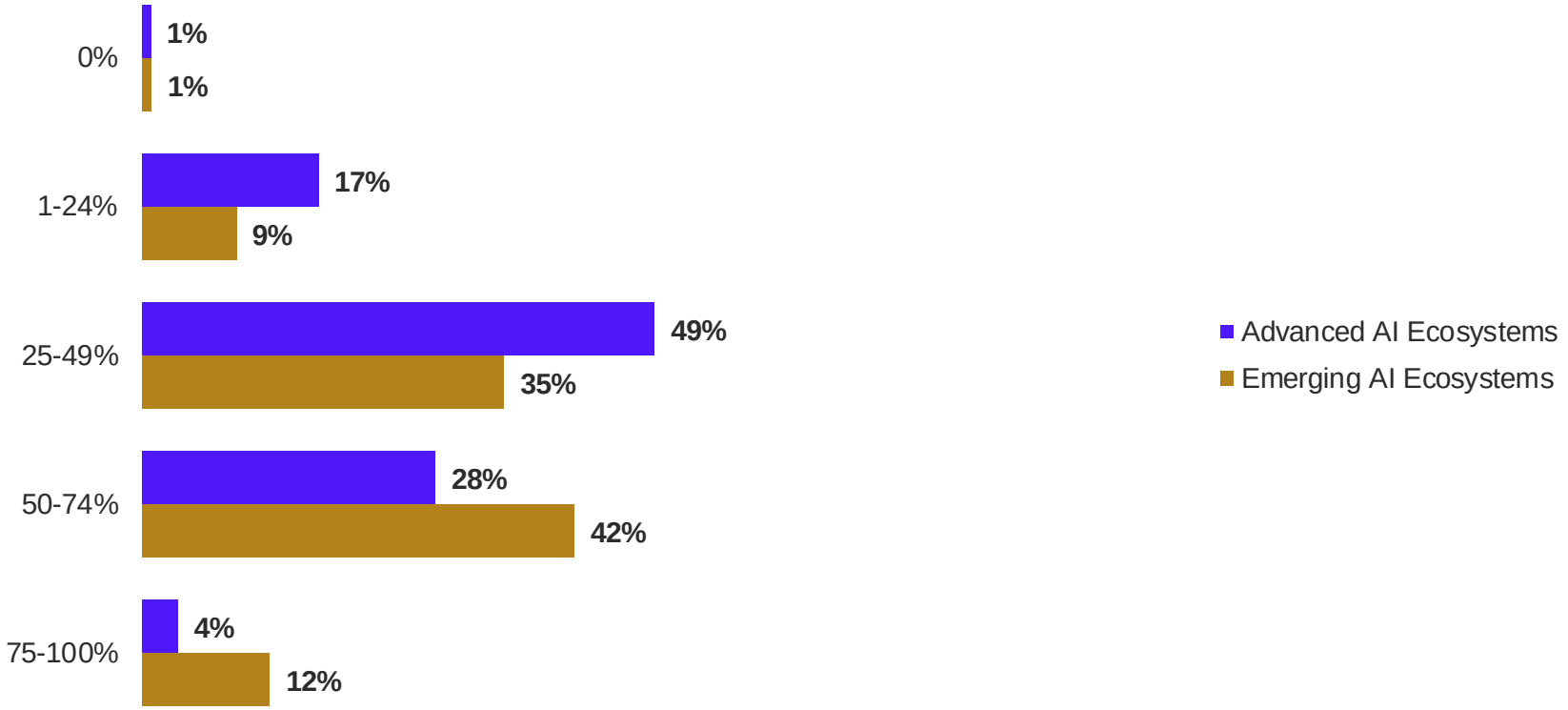


IBM19 In which areas is your company most likely to consider reducing its AI investments in 2025? Please select up to three options.
Sample Size: Advanced AI Ecosystem (US, Canada, UK, France, Germany, Singapore, South Korea) = 1,407, Emerging AI Ecosystems(Mexico, Spain, Brazil, India, Indonesia) = 1,006

APPENDIX: ADVANCED VS. EMERGING AI ECOSYSTEM MARKETS

Percentage of AI Solutions Based on Open-Source in 2025

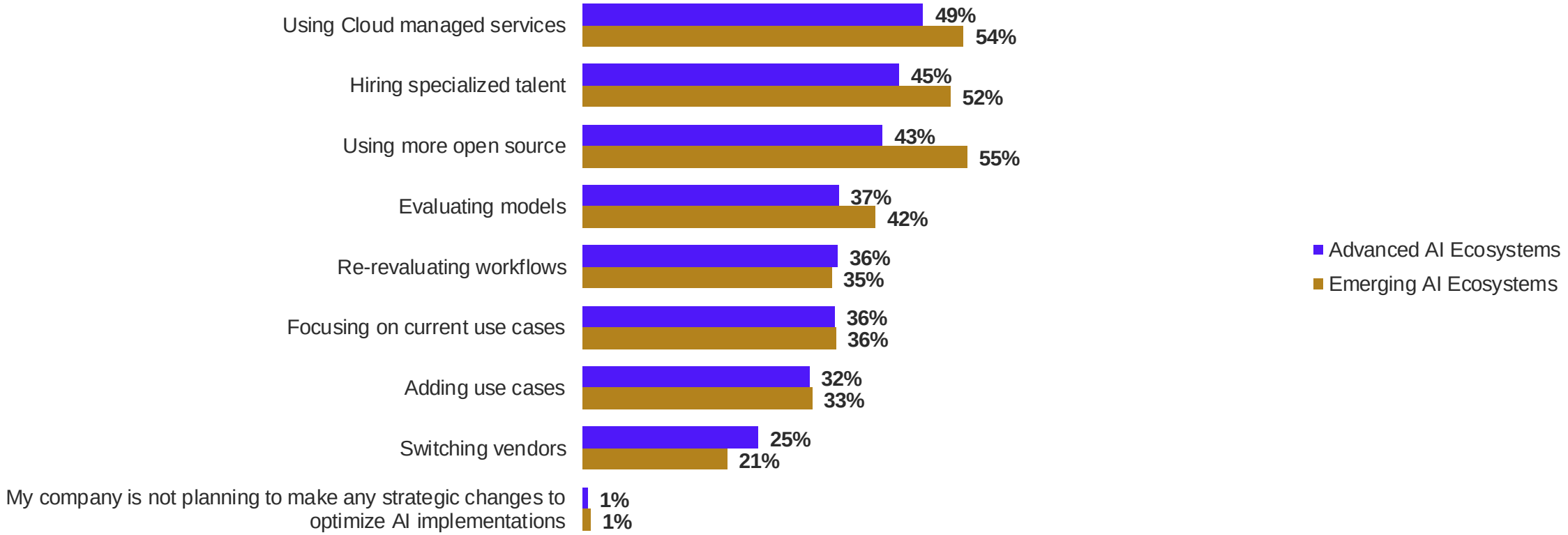
Among ITDMs in Advanced vs. Emerging AI Ecosystem Markets, Showing % Selected



IBM20 In the next year, what percentage of your AI solutions or platforms will be based on open source?
Sample Size: Advanced AI Ecosystem (US, Canada, UK, France, Germany, Singapore, South Korea) = 1,407, Emerging AI Ecosystems(Mexico, Spain, Brazil, India, Indonesia) = 1,006

Strategic Changes to Optimize AI Implementation Planned for 2025

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



IBM21 Which of the following strategic changes, if any, is your company planning for 2025 to optimize AI implementations? Please select all that apply.
Sample Size: Advanced AI Ecosystem (US, Canada, UK, France, Germany, Singapore, South Korea) = 1,407, Emerging AI Ecosystems(Mexico, Spain, Brazil, India, Indonesia) = 1,006

Appendix: ITDMs by Market

Progress of AI Strategy

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
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

IBM1 Which of the following statements best describes your organization's AI strategy today?

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**
None	0%	2%	0%	0%	1%	1%	0%	0%	0%	0%	0%	0%	0%
1-10	28%	29%	39%	27%	27%	36%	23%	27%	34%	11%	33%	20%	26%
11-20	51%	55%	46%	51%	38%	53%	63%	58%	52%	44%	54%	44%	54%
21-30	16%	11%	11%	19%	25%	10%	10%	10%	11%	37%	10%	22%	12%
More than 30	5%	2%	4%	2%	8%	0%	5%	5%	2%	8%	2%	13%	8%
Sample Sizes	2413	220	215	208	230	219	220	216	217	224	217	127	100

IBM2 By the end of the year, how many AI pilots will your company have started in 2024?

Percentage of 2024 AI Pilots Fully Launched in 2024

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

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

IBM3 What percentage of the AI pilots started in 2024 will have fully launched by the end of the year?

Average Length of Time to Transition From Pilot to Full Production

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

		North America		LatAm		EMEA				APAC			
	All ITDMs	**US**	**CANADA**	**MEXICO**	**BRAZIL**	**UK**	**FRANCE**	**GERMANY**	**SPAIN**	**INDIA**	**SINGAPORE**	**INDONESIA**	**SOUTH KOREA**
Less than 6 months	10%	11%	8%	16%	20%	9%	10%	7%	4%	12%	4%	6%	13%
6 to 12 months	48%	46%	46%	51%	49%	41%	44%	53%	53%	51%	48%	56%	41%
1 to 2 years	34%	32%	38%	29%	27%	37%	31%	34%	41%	32%	38%	29%	41%
More than 2 years	6%	7%	7%	2%	3%	11%	14%	4%	1%	5%	10%	9%	3%
None of our AI pilots have moved into full production.	1%	1%	1%	1%	1%	1%	1%	1%	1%	0%	0%	0%	2%
Not applicable, we have never launched an AI pilot.	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

IBM4 On average, how long does it take your organization to transition from launching an AI pilot to full production?

Obstacles Faced When Implementing AI Pilot Projects

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

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

IBM5 Which of the following obstacles, if any, has your company encountered when moving AI projects from pilot to full implementation? Please select all that apply.

Source of AI Tools

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**
Buy or lease from vendors	67%	70%	65%	61%	70%	69%	69%	74%	68%	60%	55%	80%	75%
Open-source ecosystem	61%	55%	57%	65%	43%	57%	55%	59%	66%	89%	53%	73%	75%
In-house development	55%	50%	42%	73%	62%	36%	45%	45%	55%	68%	62%	79%	61%
Sample Sizes	2413	220	215	208	230	219	220	216	217	224	217	127	100

IBM6 Where does your company source your AI tools?

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

IBM7 How challenging are the following obstacles for your company when implementing AI?

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**
None	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
1-10	21%	26%	28%	13%	17%	26%	18%	26%	28%	5%	28%	17%	20%
11-20	44%	48%	42%	50%	32%	50%	58%	50%	41%	30%	53%	31%	42%
21-30	22%	20%	20%	29%	31%	19%	18%	16%	24%	28%	17%	21%	25%
More than 30	11%	4%	9%	8%	18%	2%	5%	7%	6%	37%	3%	31%	13%
Not sure / Don't know	1%	2%	0%	0%	1%	2%	0%	0%	1%	0%	0%	0%	0%
Sample Sizes	2413	220	215	208	230	219	220	216	217	224	217	127	100

IBM8 How many AI pilots does your company have planned for 2025?

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**
0%	1%	3%	2%	2%	3%	1%	0%	0%	2%	0%	0%	2%	0%
1-24%	16%	20%	23%	7%	13%	23%	15%	19%	21%	4%	19%	8%	17%
25-49%	46%	51%	47%	41%	41%	50%	47%	50%	43%	48%	49%	35%	44%
50-74%	32%	21%	25%	40%	37%	23%	34%	31%	31%	41%	29%	38%	35%
75-100%	5%	4%	2%	10%	7%	3%	3%	0%	2%	8%	2%	18%	4%
Sample Sizes	2413	220	215	208	230	219	220	216	217	224	217	127	100

IBM10 What percentage of your company's current AI solutions or platforms are based on open-source?

Motivations Driving AI Implementation

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**
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

IBM11 What is the primary motivation driving AI implementation at your company?

Metrics Used to Measure 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
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

IBM12 How does your company calculate return on investment (ROI) from AI investments? Please select all that apply.

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
Hard dollar/quantifiable savings	15%	20%	16%	11%	13%	14%	16%	17%	17%	11%	21%	16%	14%
Productivity time savings	22%	23%	21%	26%	21%	26%	20%	18%	24%	17%	25%	11%	27%
Shorter time to troubleshoot issues	14%	13%	17%	13%	11%	14%	19%	19%	15%	6%	10%	13%	27%
Faster software development	25%	21%	21%	23%	31%	26%	21%	28%	27%	34%	22%	26%	16%
More rapid innovation	23%	21%	25%	27%	24%	20%	23%	18%	17%	32%	22%	34%	16%
Sample Sizes	2413	220	215	208	230	219	220	216	217	224	217	127	100

IBM12a Which of these metrics is most important to your company when measuring ROI from AI investments? (Rebased to Total)

Most Important Indicators of a Successful AI Strategy

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
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

IBM13 Which outcome is most important to demonstrate the success of your company's AI strategy?

ROI From 2024 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**
We are currently achieving positive ROI from our AI projects.	47%	48%	42%	49%	48%	42%	29%	41%	39%	76%	54%	57%	51%
We are breaking-even on our AI projects.	33%	30%	31%	34%	47%	32%	40%	33%	38%	19%	33%	21%	34%
We are currently seeing negative ROI from our AI projects.	14%	16%	18%	11%	3%	20%	21%	19%	18%	4%	9%	17%	10%
It is difficult for us to measure ROI from our AI projects.	6%	6%	9%	6%	3%	6%	10%	6%	5%	1%	4%	6%	5%
Sample Sizes	2413	220	215	208	230	219	220	216	217	224	217	127	100

IBM14 How would you rate ROI from your company's AI investments in 2024?

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

IBM15 When do you expect your company will see positive ROI from its AI investments?

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

Among all ITDMs, Showing % Ranked 1

		North America		LatAm		EMEA				APAC			
	All ITDMs	**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

IBM16 What factors do you think most impact the ROI of your company's AI investments? Please rank the top 4 options, with 1 being the most impactful and 4 being the fourth most impactful.

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
Increase its investment in AI.	62%	61%	56%	69%	78%	57%	41%	51%	61%	93%	57%	48%	71%
Maintain the current level of investment in AI.	27%	30%	35%	18%	16%	33%	40%	31%	27%	4%	35%	33%	20%
Decrease its investment in AI.	5%	4%	4%	3%	1%	5%	11%	9%	8%	1%	1%	13%	7%
Reallocate AI spend across different/other IT projects.	6%	5%	4%	10%	5%	5%	8%	9%	3%	2%	6%	6%	2%
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

IBM17 How does your company plan to allocate its AI budget in 2025? My company plans to…

Top Areas for Allocating AI Investments 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
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

IBM18 In which areas is your company most interested in allocating its AI investments in 2025? Please select up to three options.

Top Areas Likely to See AI Investments Reduced 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
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

IBM19 In which areas is your company most likely to consider reducing its AI investments in 2025? Please select up to three options.

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
0%	1%	2%	2%	1%	2%	1%	0%	0%	0%	1%	0%	1%	0%
1-24%	14%	23%	20%	7%	10%	17%	14%	13%	16%	4%	15%	9%	19%
25-49%	43%	47%	45%	37%	38%	50%	52%	51%	40%	26%	58%	34%	36%
50-74%	34%	22%	30%	40%	39%	29%	29%	33%	35%	60%	25%	31%	35%
75-100%	7%	3%	3%	15%	10%	2%	5%	3%	7%	10%	2%	26%	10%
Not sure / Don't know	1%	3%	0%	0%	1%	1%	0%	0%	1%	0%	0%	0%	0%
Sample Sizes	2413	220	215	208	230	219	220	216	217	224	217	127	100

IBM20 In the next year, what percentage of your AI solutions or platforms will be based on open source?

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
Evaluating models	39%	41%	43%	35%	42%	43%	26%	30%	43%	46%	37%	41%	34%
Using more open source	48%	41%	41%	45%	50%	38%	41%	49%	51%	71%	44%	57%	49%
Switching vendors	23%	20%	27%	22%	13%	21%	26%	27%	19%	29%	26%	20%	32%
Hiring specialized talent	48%	48%	41%	54%	51%	47%	37%	45%	43%	66%	51%	45%	48%
Re-revaluating workflows	36%	38%	34%	35%	45%	38%	35%	37%	26%	35%	38%	37%	32%
Adding use cases	32%	31%	30%	33%	25%	29%	30%	36%	35%	38%	35%	34%	40%
Focusing on current use cases	36%	35%	30%	31%	24%	32%	37%	38%	45%	45%	40%	36%	44%
Using Cloud managed services	51%	58%	49%	47%	58%	51%	40%	50%	45%	70%	41%	49%	57%
My company is not planning to make any strategic changes to optimize AI implementations	1%	2%	0%	0%	2%	1%	0%	0%	1%	2%	0%	0%	0%
Not sure/Don't know	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%
Sample Sizes	2413	220	215	208	230	219	220	216	217	224	217	127	100

IBM21 Which of the following strategic changes, if any, is your company planning for 2025 to optimize AI implementations? Please select all that apply.

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