

Dell Technologies Survey 2025

750 business and IT decision makers across US, UK, DE, FR and JP, all segments, Feb 2025

Conducted by Vanson Bourne

 Dell Technologies



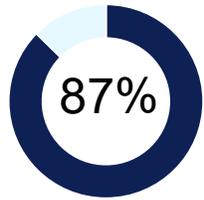
Vanson Bourne



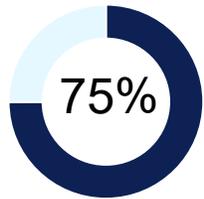
Business strategies and innovation

Business strategy influences

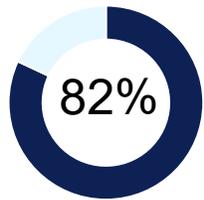
Key part of business strategy (Q1)



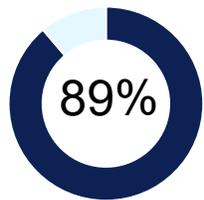
say **innovation** is a key part of their organization's business strategy



say **AI/Gen AI** is a key part of their organization's business strategy

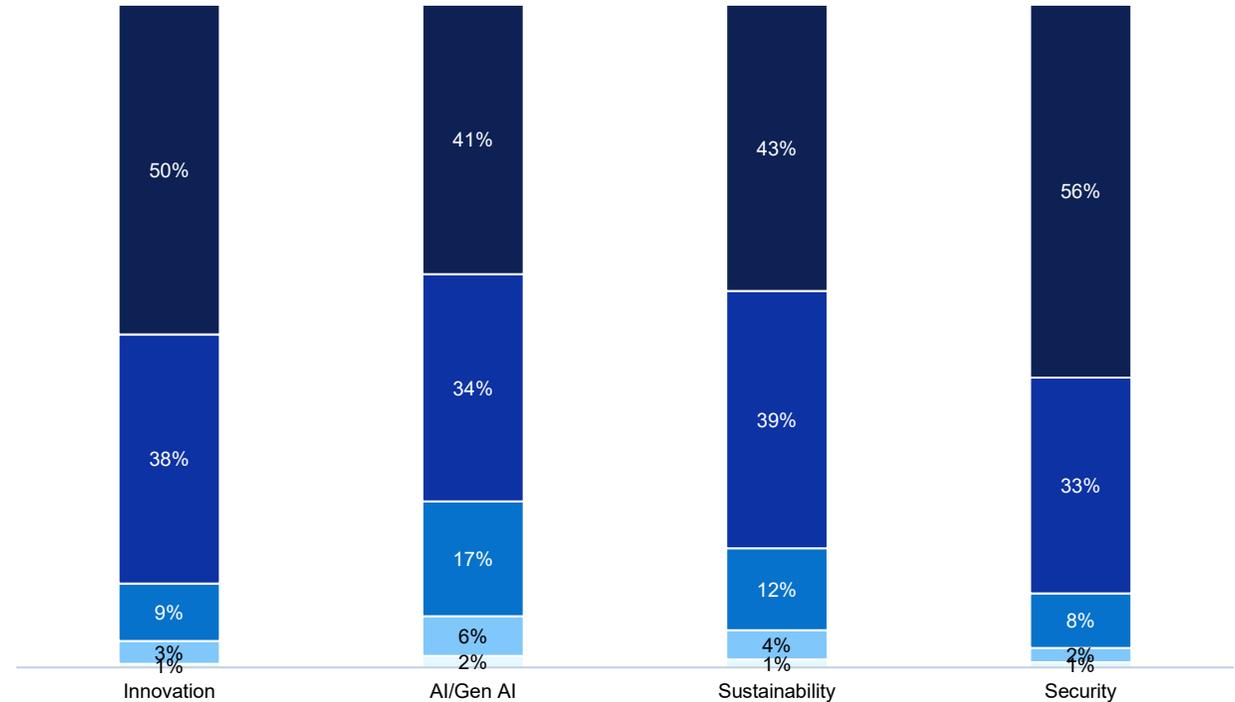


say **sustainability** is a key part of their organization's business strategy



say **security** is a key part of their organization's business strategy

Role the following play in respondents' organizations business strategies (Q1)



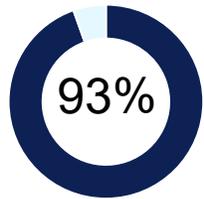
- It is a key part of our business strategy and is unlocking benefits across our organization already
- It is a key part of our business strategy and will unlock benefits across our organization in the future
- We recognize it is important to have within business strategy, but we don't currently have it included
- It is not a part of our business strategy, and we don't think it's important to be included
- I am unfamiliar with my organization's business strategy

Challenges of integration

Experience challenges (Q2)



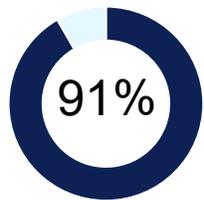
experience challenges when integrating **innovation** into their business strategies



experience challenges when integrating **AI/GenAI** into their business strategies

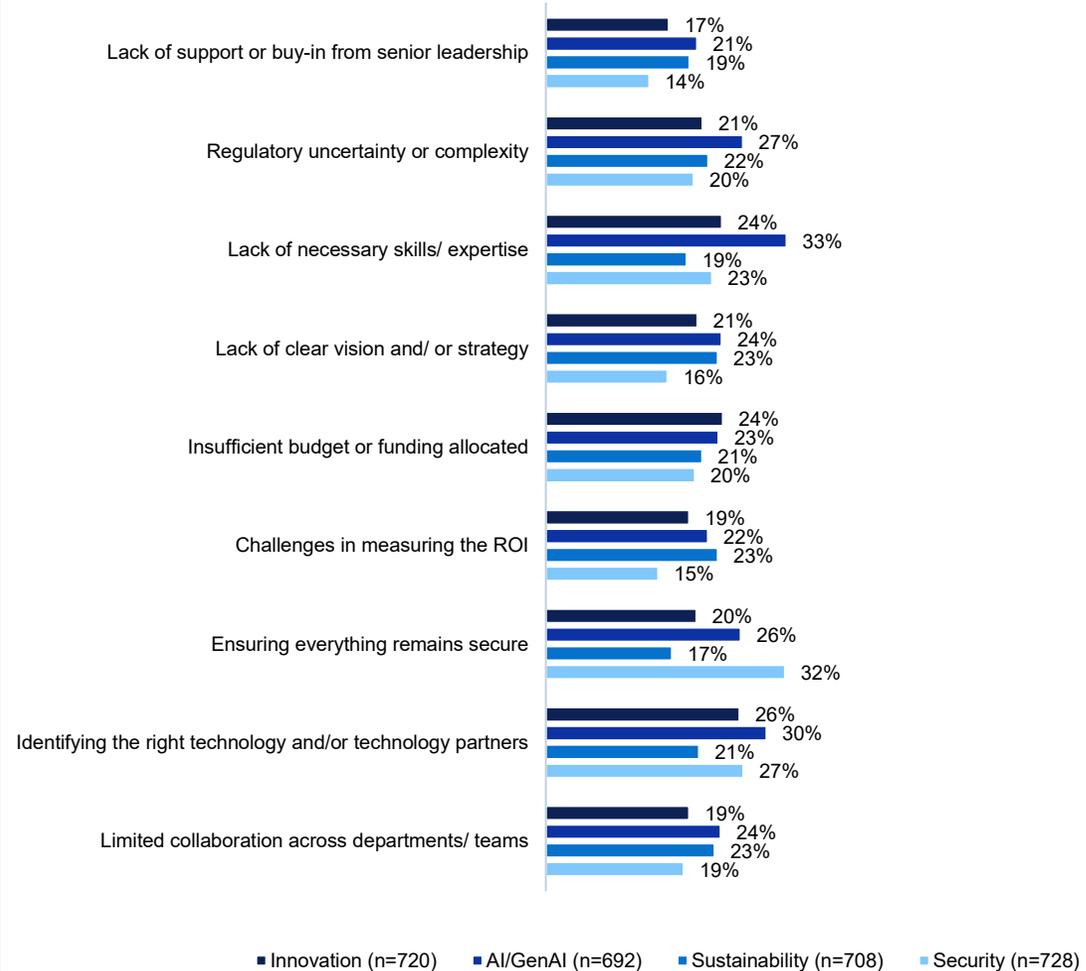


experience challenges when integrating **sustainability** into their business strategies



experience challenges when integrating **security** into their business strategies

Challenges when integrating the following into business strategies (Q2)



Top 3 challenges

Innovation - top 3 challenges (Q2)

- #1 Identifying the right technology and/or technology partners
- #2 Insufficient budget or funding allocated
- #3 Lack of necessary skills/ expertise

720 respondents

AI/GenAI - top 3 challenges (Q2)

- #1 Lack of necessary skills/ expertise
- #2 Identifying the right technology and/or technology partners
- #3 Regulatory uncertainty or complexity

692 respondents

Sustainability - top 3 challenges (Q2)

- #1 Lack of clear vision and/ or strategy
- #2 Challenges in measuring the ROI
- #3 Limited collaboration across departments/ teams

708 respondents

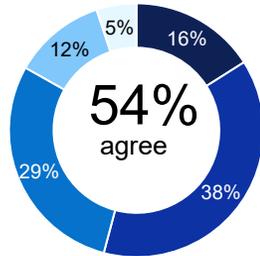
Security - top 3 challenges (Q2)

- #1 Ensuring everything remains secure
- #2 Identifying the right technology and/or technology partners
- #3 Lack of necessary skills/ expertise

728 respondents

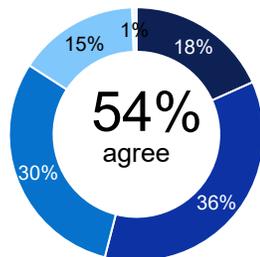
Keeping pace with the industry

We're struggling to keep up with the pace of disruption (Q3_1)



■ Strongly agree
■ Somewhat agree
■ Somewhat disagree
■ Strongly disagree
■ Don't know

We don't know what the next 3-5 years will look like for our industry (Q3_2)



■ Strongly agree
■ Somewhat agree
■ Somewhat disagree
■ Strongly disagree
■ Don't know

Why do organization's struggle to keep up with the pace of disruption (Q3b)

Summary of verbatim answers:

- Use of legacy technology/unable to keep pace with change
- Technology costs/lack of investment
- Strategic limitations
- Organizational dynamics
- Resource constraints (e.g. financial, resource etc.)
- Workforce challenges (excluding skills gap)
- Skilled workforce shortage

Verbatim examples:

"The pace of change is too quick, and it is hard to keep up."

"We struggle to align our resourcing with the use of new technologies."

"Staying abreast of competitors while transforming legacy on a limited budget."

"Transformative projects are not given enough priority."

406 respondents

How do organization's keep up with the pace of disruption (Q3c)

Summary of verbatim answers:

- Strategic planning
- Embracing new technologies and/or software
- External and cross team collaboration
- Operational efficiency, agility and flexibility
- Innovation and creativity
- Continuous improvement
- Managing existing technology
- Customer focus
- Risk management
- Employee development

Verbatim examples:

"We maintain openness to new technologies and remain flexible in our approach to emerging trends."

"We constantly upgrade our security to meet the highest standards."

"Constant review and change. We are always seeking advice."

"Foster flexibility and a curiosity to learning at all levels."

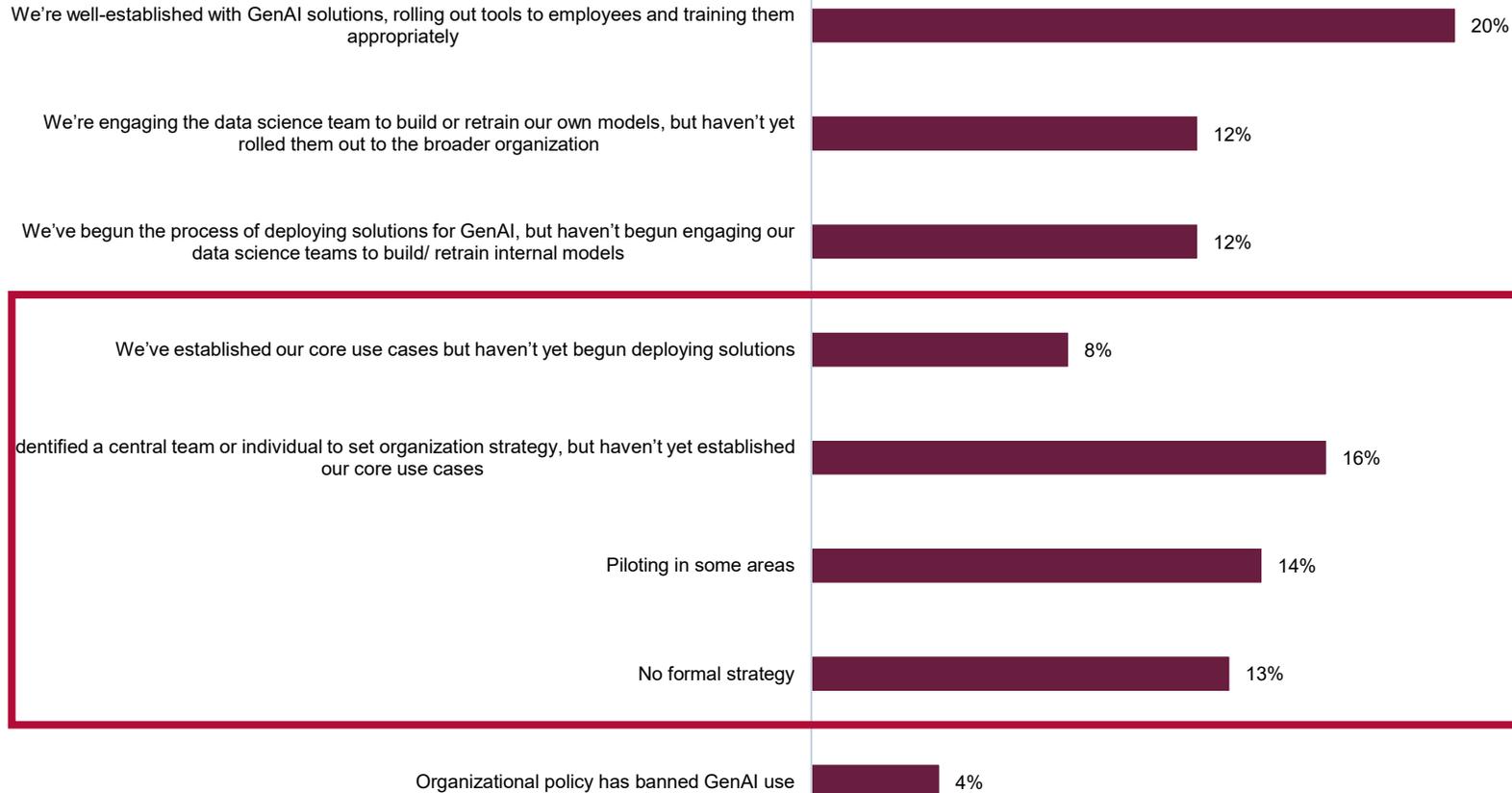
306 respondents

The role of artificial intelligence

750 respondents

AI/GenAI journey

Organization's GenAI journey (Q5)

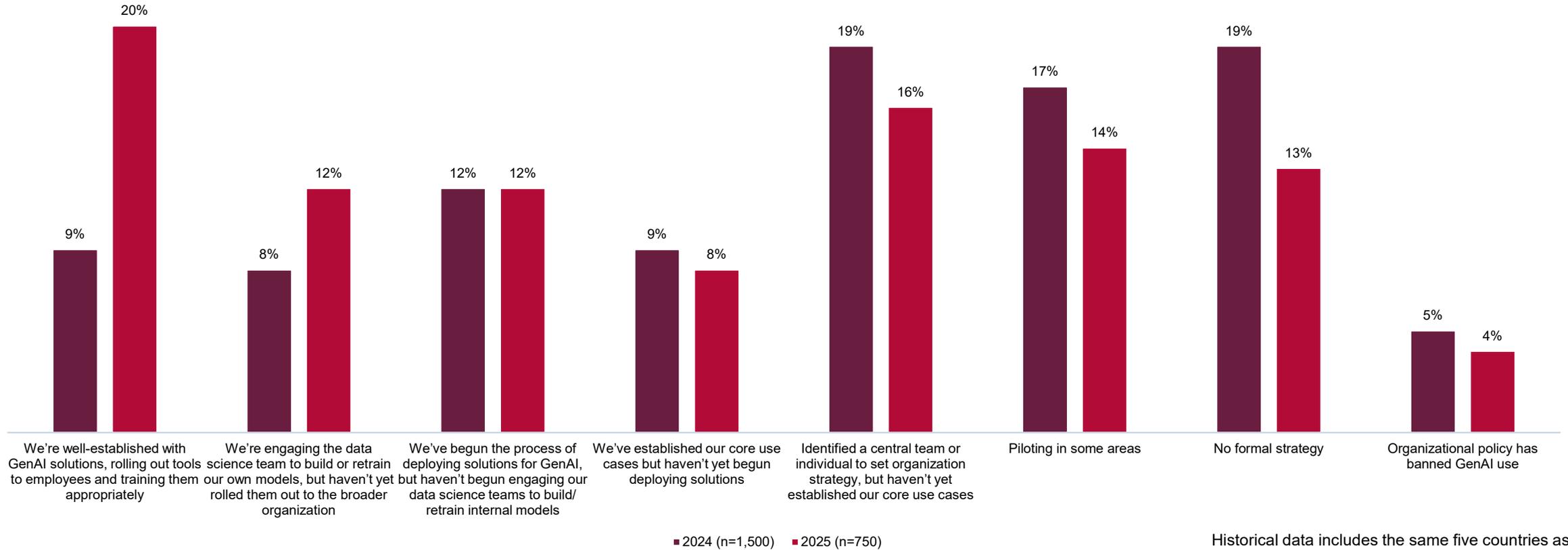


50%
of organizations at early to mid-stage of their journey

750 respondents

AI/GenAI journey

Organization's GenAI journey Year on Year (Q5)

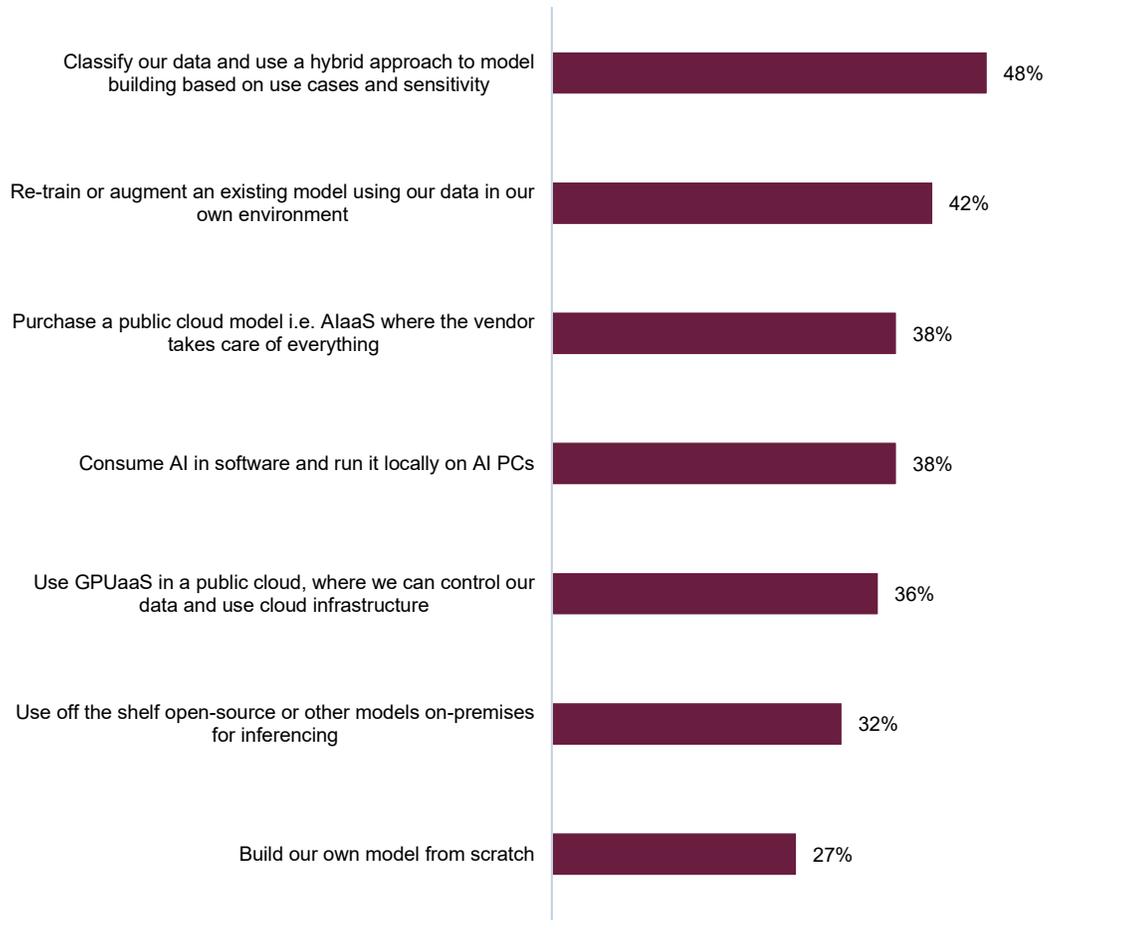


Historical data includes the same five countries as the 2025 survey, but does not include SBs

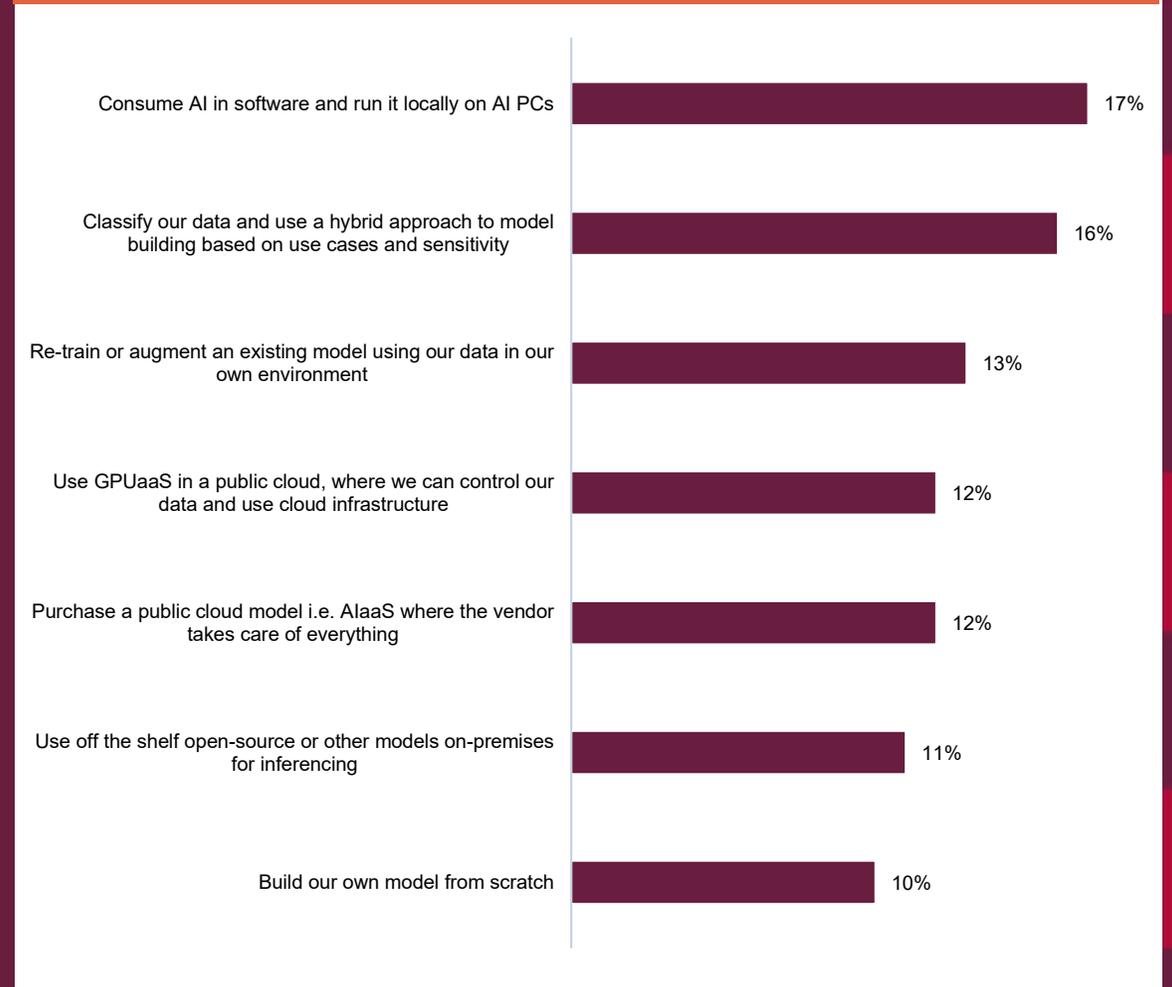
750 respondents

AI/GenAI strategy

Most common types of procurement/usage that will be included in AI/GenAI strategy (Q6combi)



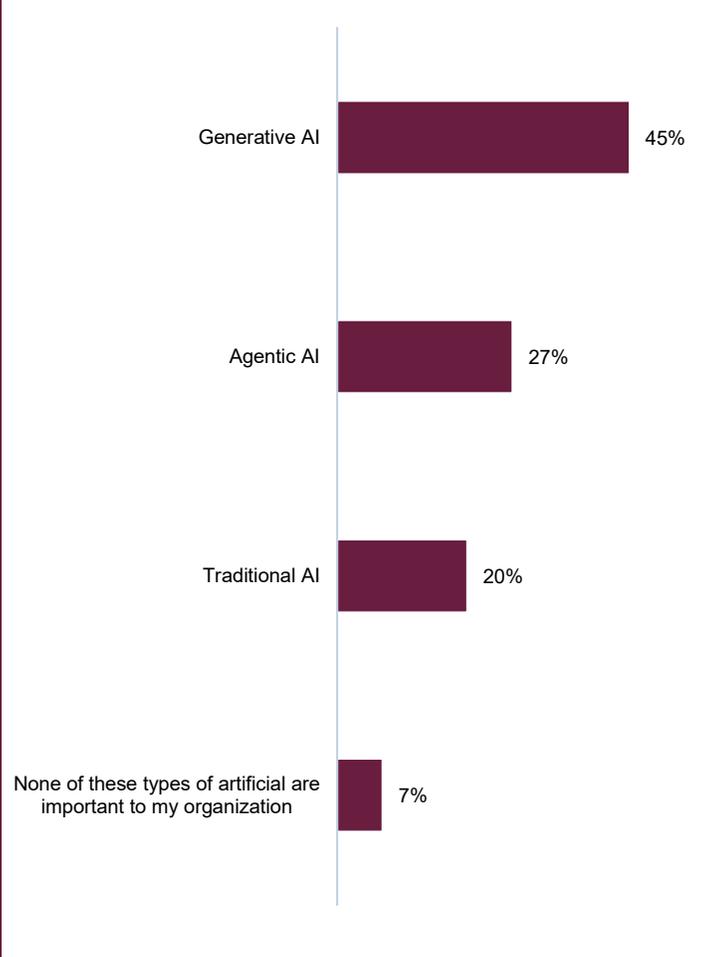
Most likely type of procurement/usage (Q6rank1)



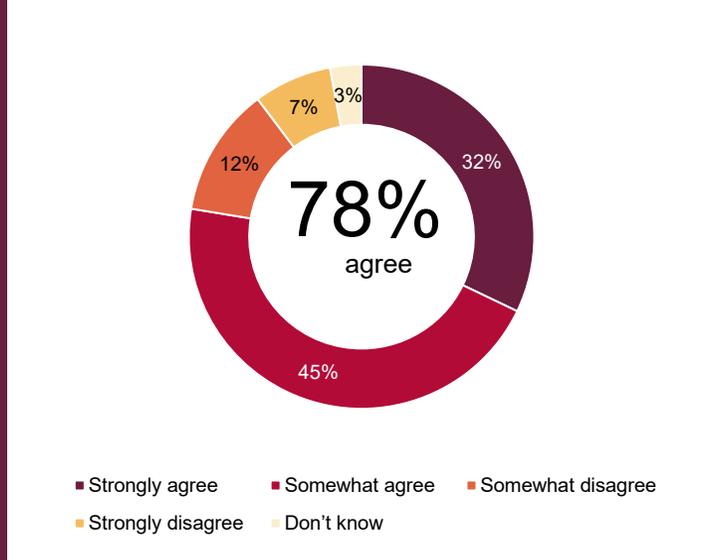
750 respondents

Importance of artificial intelligence

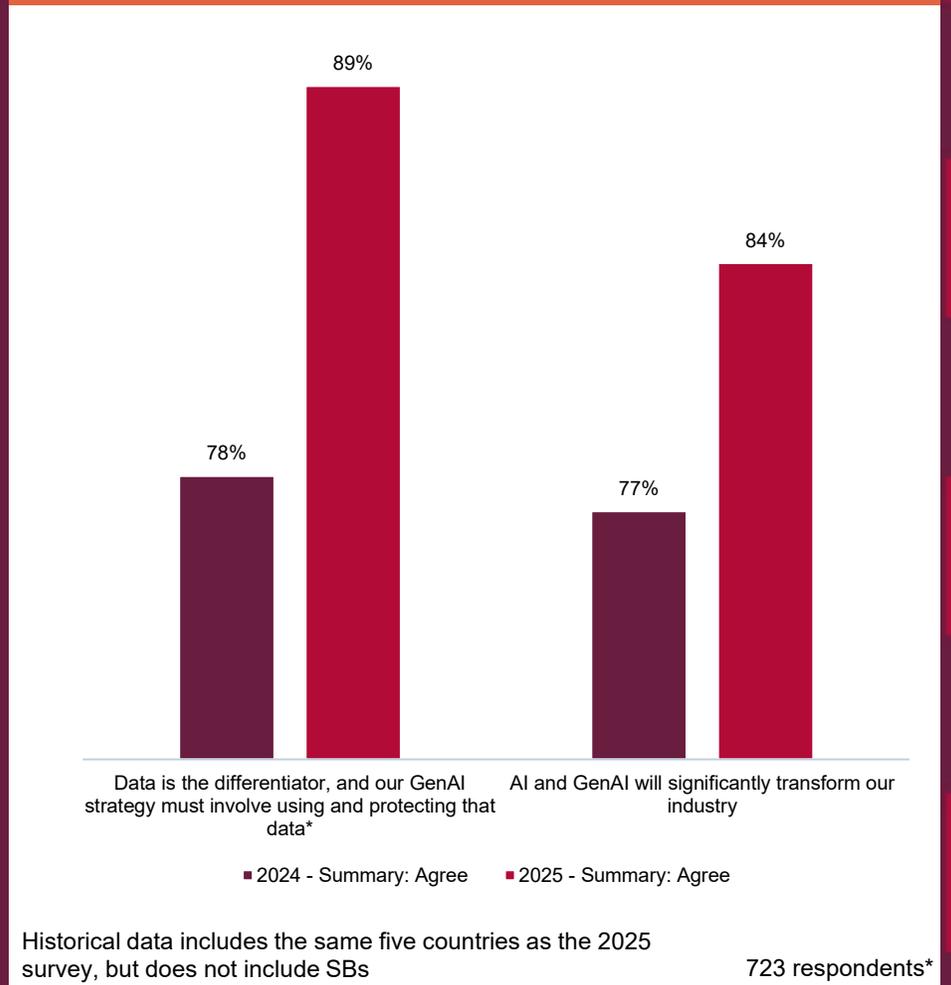
Most important type of AI for my organization (Q4)



We see strong opportunities to leverage agentic AI in our business (Q7)



To what extent do you agree or disagree with the following (Q7)

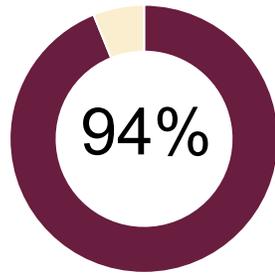


Source: Vanson Bourne, Dell Technologies survey across 750 business and IT decision makers across US, UK, DE, FR and JP, all segments, Feb 2025.

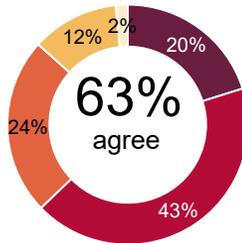
750 respondents

Artificial intelligence skills gap

of respondents believe that their organization's employees need to develop skills to fully unlock the potential of AI (Q11)

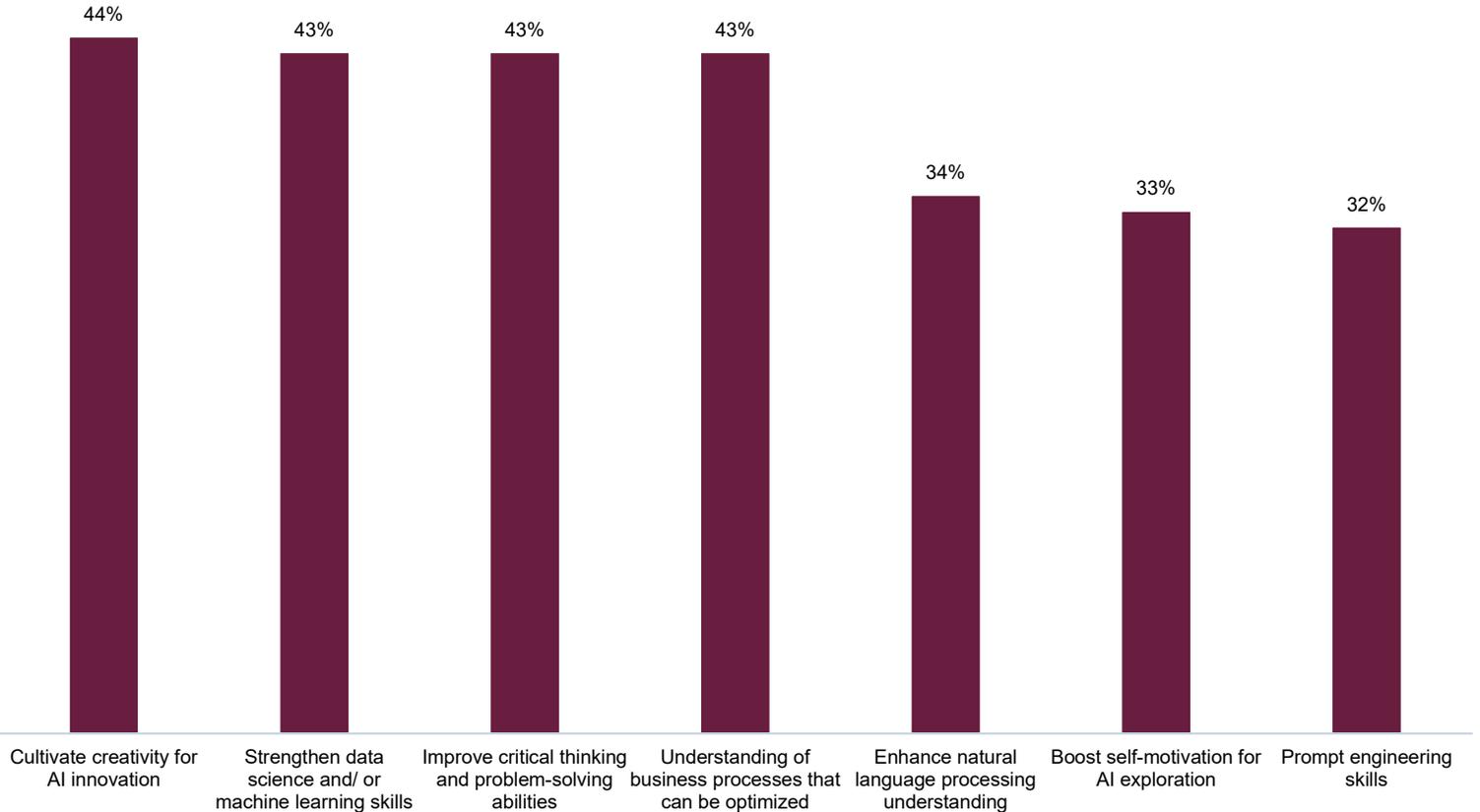


Employees within my organization do not fully understand how to implement GenAI securely (Q7_7)



■ Strongly agree ■ Somewhat agree ■ Somewhat disagree
■ Strongly disagree ■ Don't know

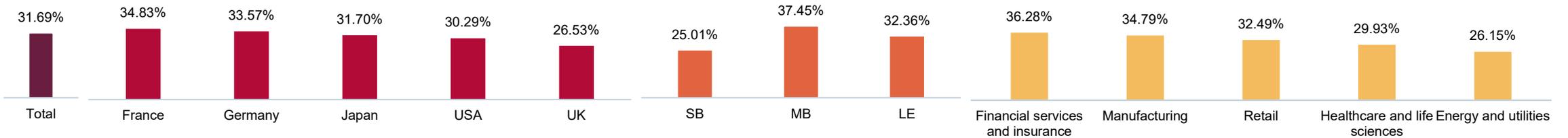
Skills that need to be developed to unlock the potential of AI (Q11)



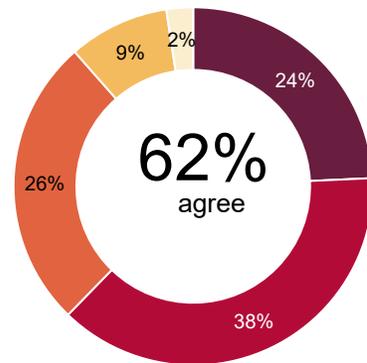
750 respondents

The ROI of artificial intelligence

Average expected return of investment from using artificial intelligence (Q10)

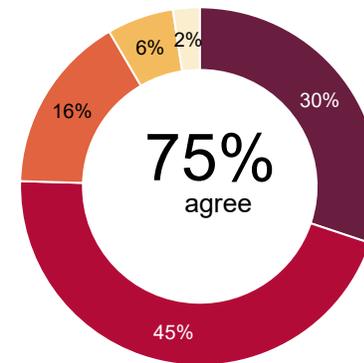


We have become pessimistic with the near-term value of AI (Q3_9)



■ Strongly agree ■ Somewhat agree ■ Somewhat disagree
■ Strongly disagree ■ Don't know

We are seeing substantial ROI and/or productivity gains from AI (Q3_10)

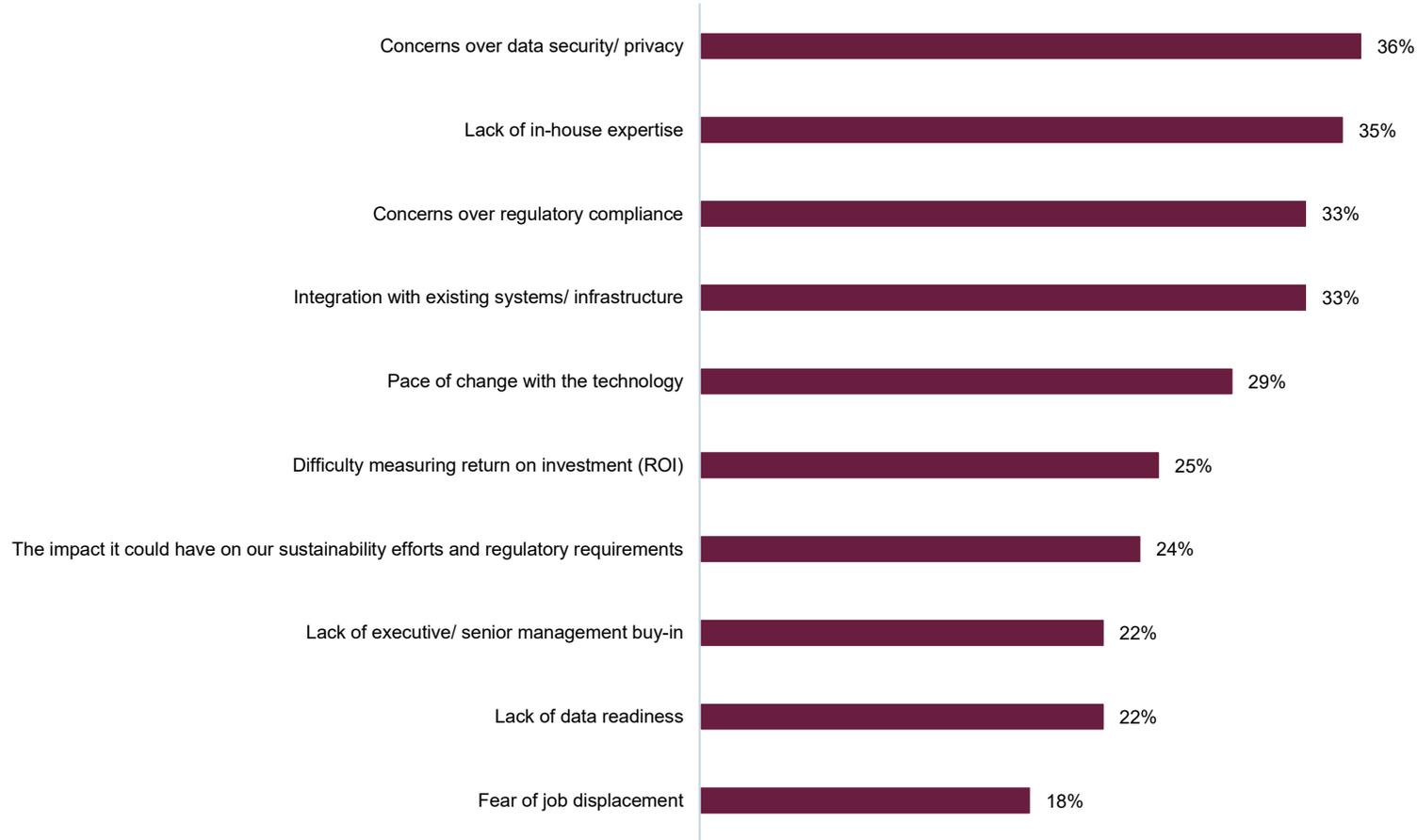


■ Strongly agree ■ Somewhat agree ■ Somewhat disagree
■ Strongly disagree ■ Don't know

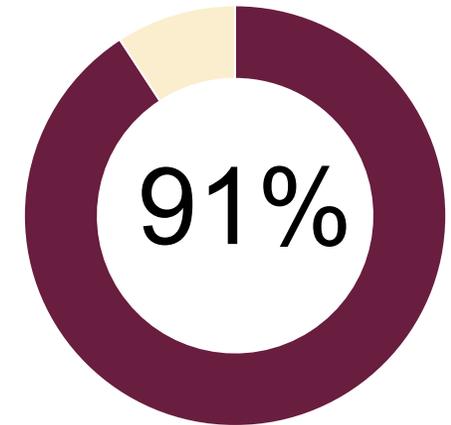
750 respondents

Barriers to GenAI/AI adoption

Barriers to adopting AI/GenAI (Q9)



of respondents face barriers or expect to face barriers when adopting AI/GenAI (Q9)



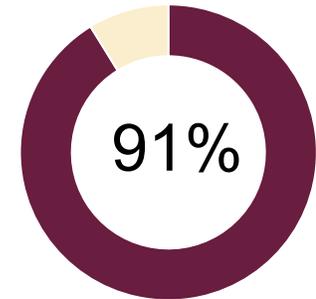
750 respondents

Data readiness challenges for AI/GenAI usage

Challenges when identifying, preparing and/or using data for AI/GenAI use cases (Q12)



91% of organizations face challenges when identifying, preparing and/or using data for AI/GenAI use cases (Q12)

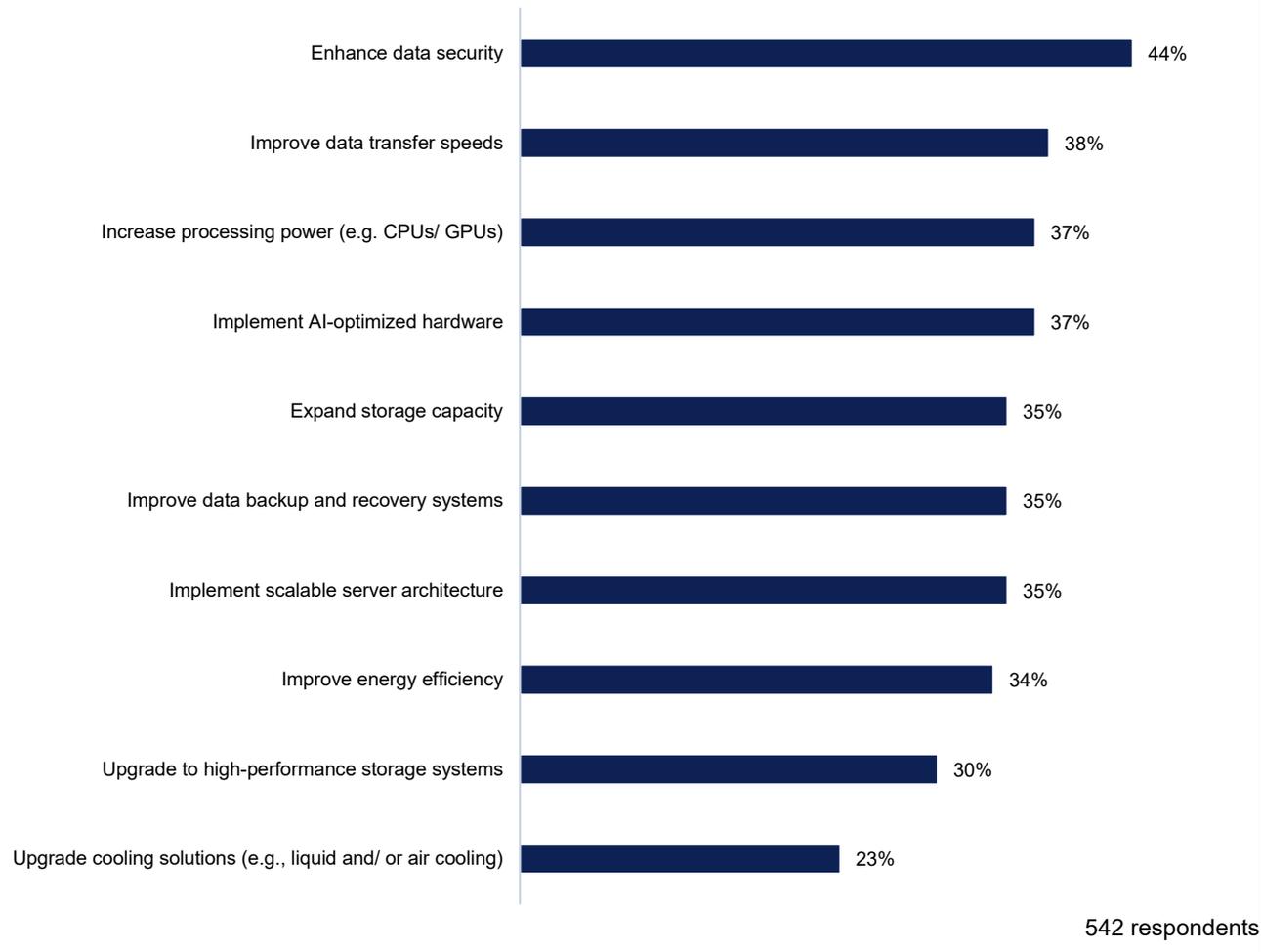


Modern Infrastructure

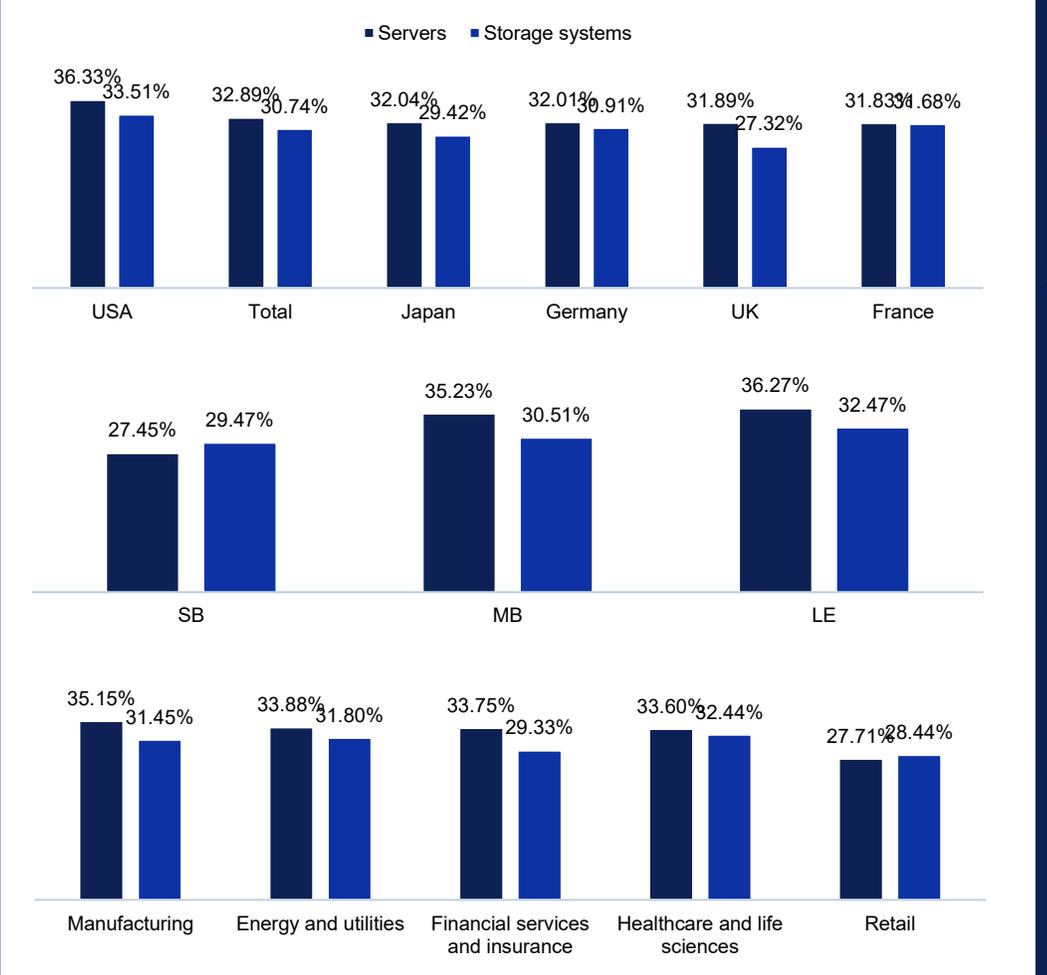
750 respondents

Storage and server upgrades

Upgrades needed to make servers and/or storage systems support AI-driven workloads (Q14)



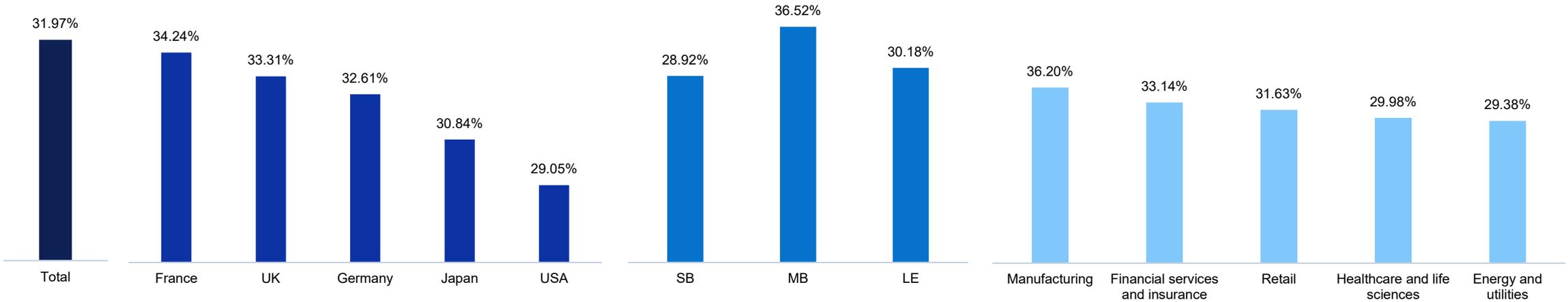
Average percentage of servers and/or storage systems that need to be upgraded to support AI-driven workloads (Q13)



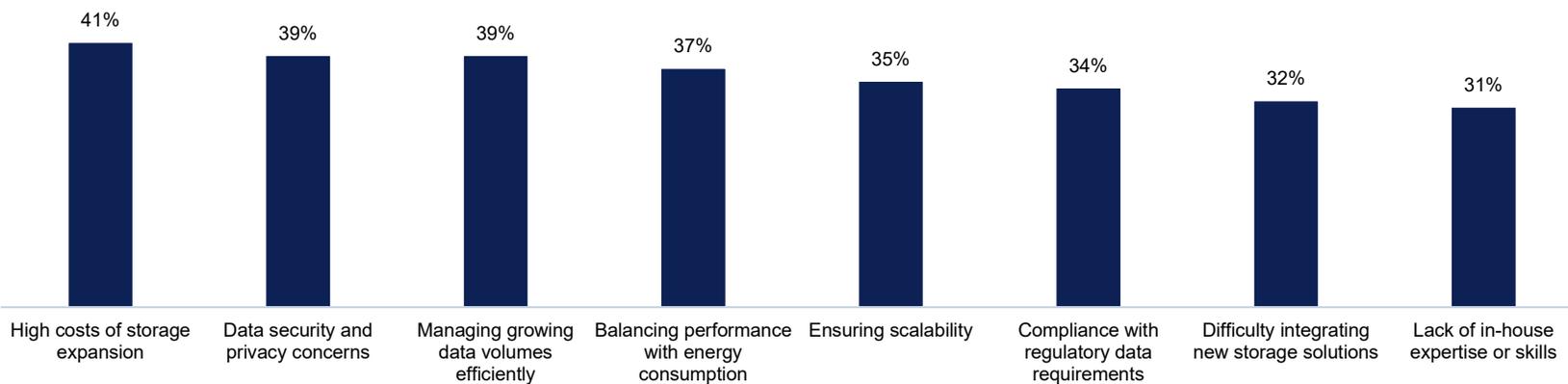
750 respondents

Increasing storage capacity

Average percentage increase to storage capacity as a result of data growth driven by AI (Q15)

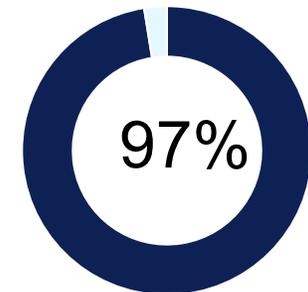


Expected challenges when increasing storage capacity (Q16)



474 respondents

of organizations planning to increase their storage capacity expect to face challenges when doing so (Q16)



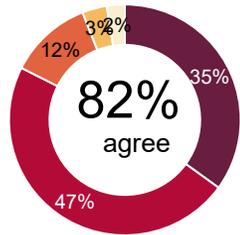
474 respondents

Modern Workplace

750 respondents

AI/GenAI and intuitive, personalized applications

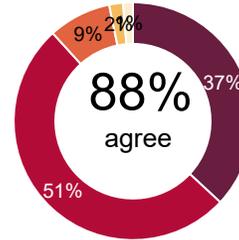
My organization plans to leverage GenAI to increase productivity, which will enhance the employee experience over the next 12 months (Q7_2)



■ Strongly agree ■ Somewhat agree ■ Somewhat disagree
■ Strongly disagree ■ Don't know

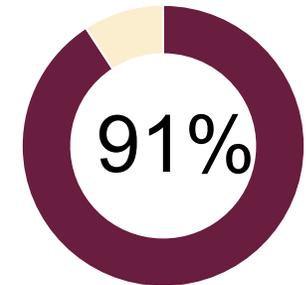
723 respondents

GenAI tools have the potential to enable the deployment of more intuitive and personalized applications (Q7_3)

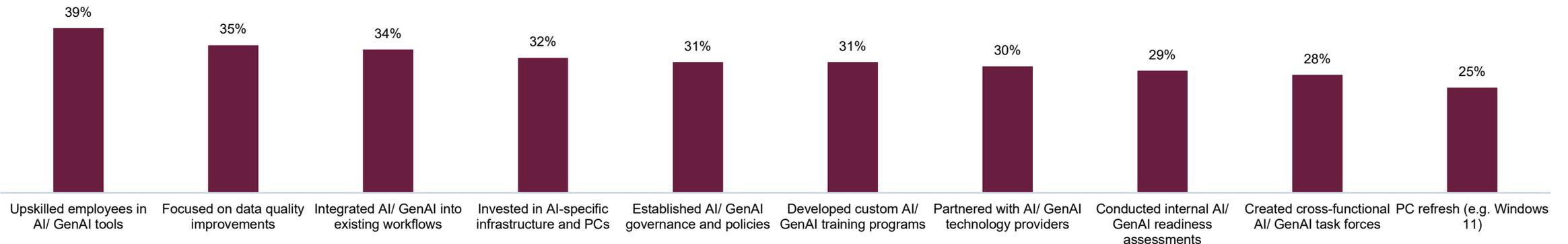


■ Strongly agree ■ Somewhat agree ■ Somewhat disagree
■ Strongly disagree ■ Don't know

of organizations have taken, or are planning to take steps towards using AI/GenAI for the deployment of intuitive and personalized applications (Q8)



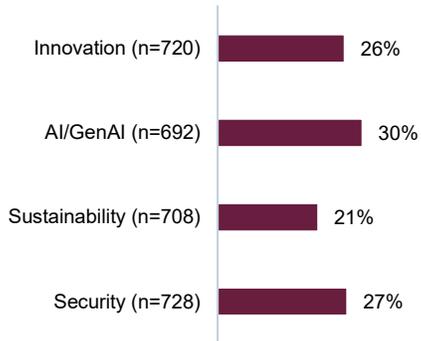
Steps taken towards using AI/GenAI for the deployment of more intuitive and personalized applications (Q8)



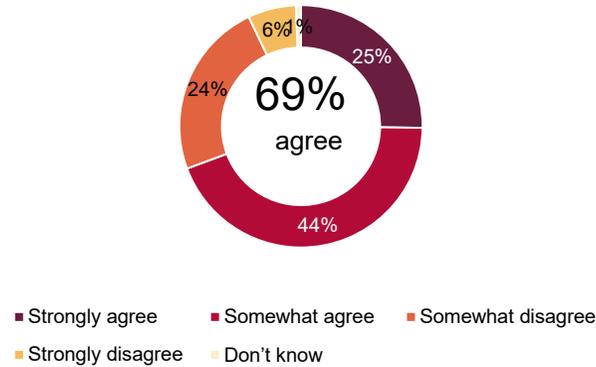
750 respondents

Modern workplace management

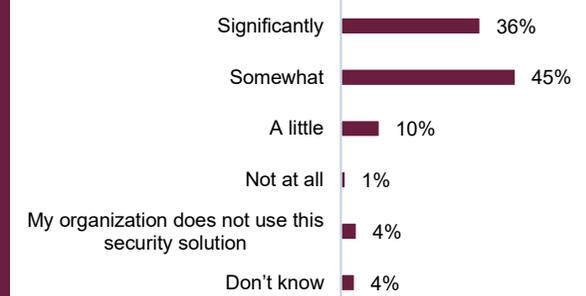
Organizations that find identifying the right technology and/or technology partners a challenge, in each of the following areas (Q2)



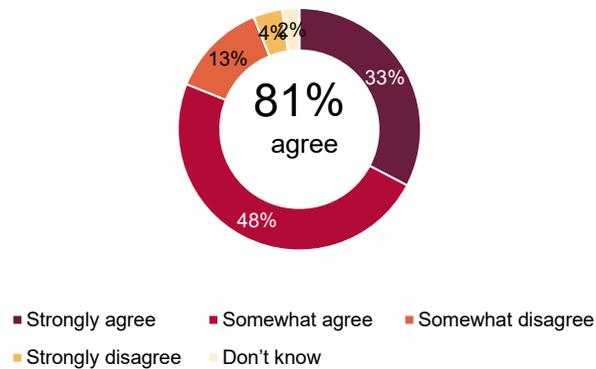
I'm concerned about my organization's ability to effectively manage our devices and protect our data (Q3_11)



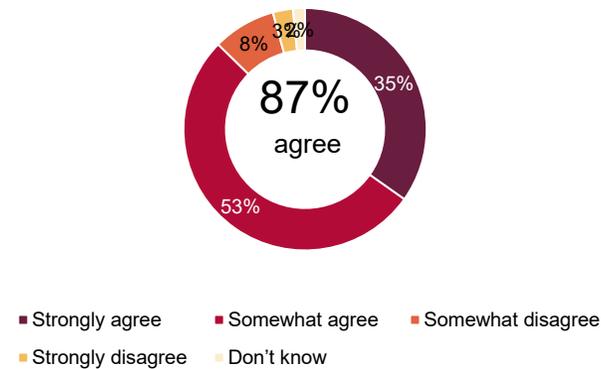
Extent endpoint security has increased confidence levels in organization's security posture (Q18)



We need the help of a third-party partner to achieve our sustainability goals (Q20_1)



Sustainable design and energy efficiency are key factors when selecting solutions for my organization (Q20_2)



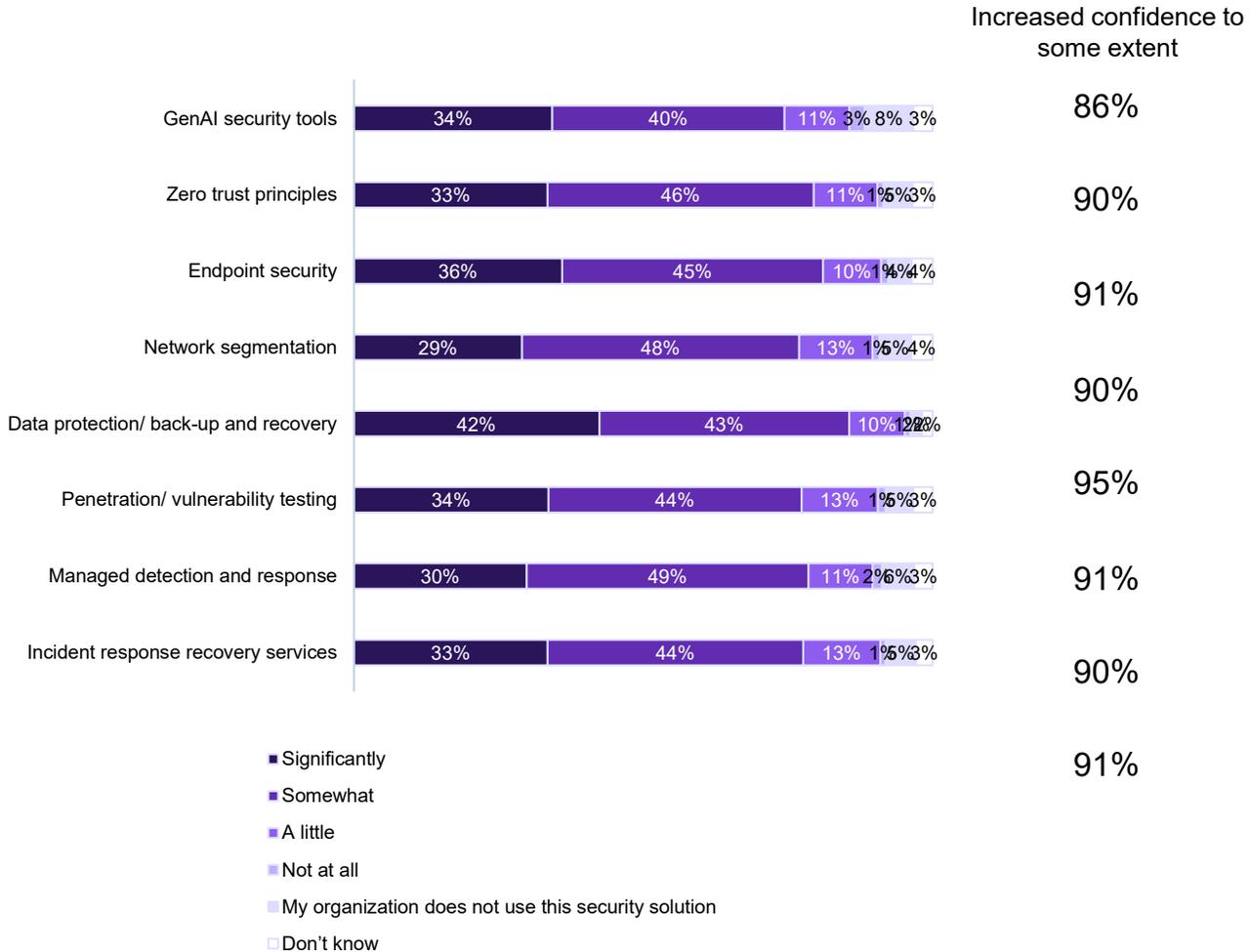


Security

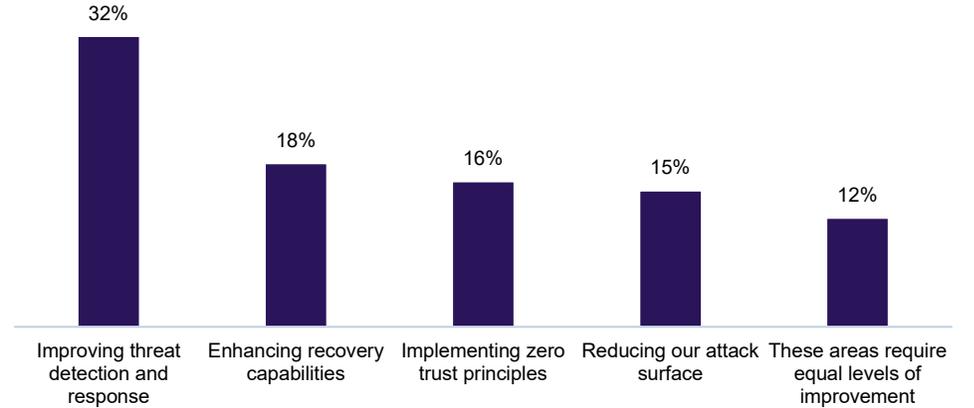
750 respondents

Importance of security

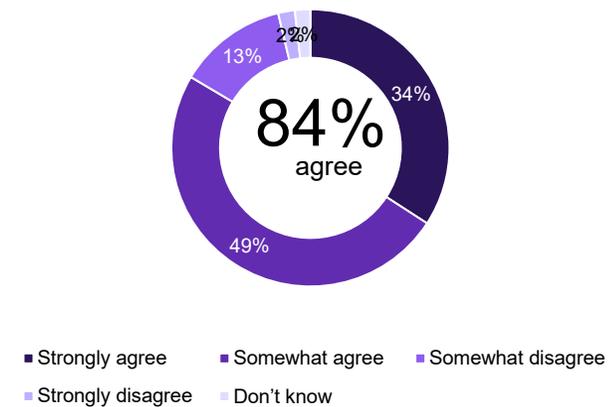
Security solutions most likely to have increased confidence levels in security posture (Q18)



Areas that require the most improvement (Q17)

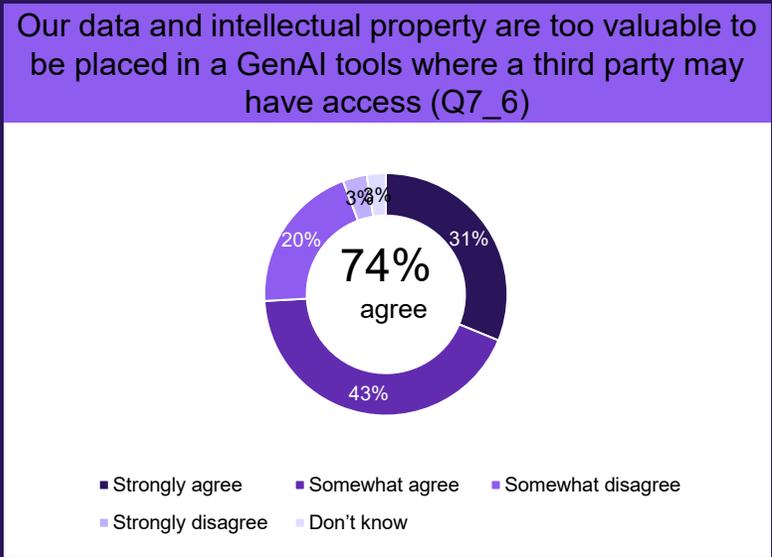
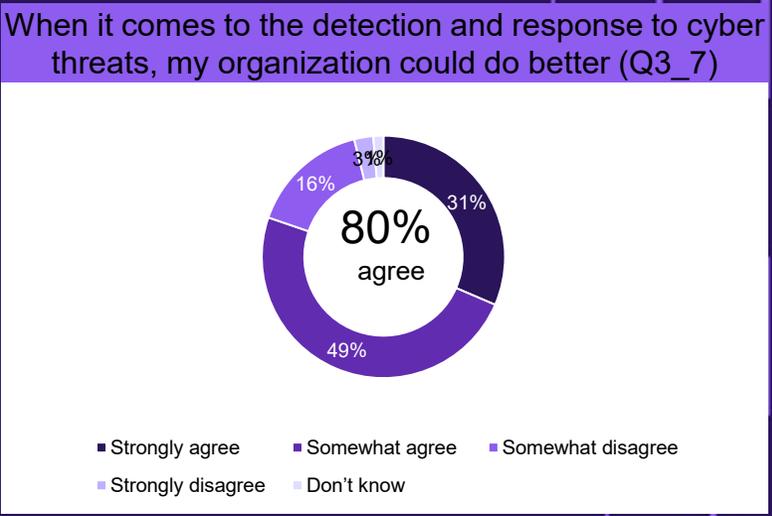
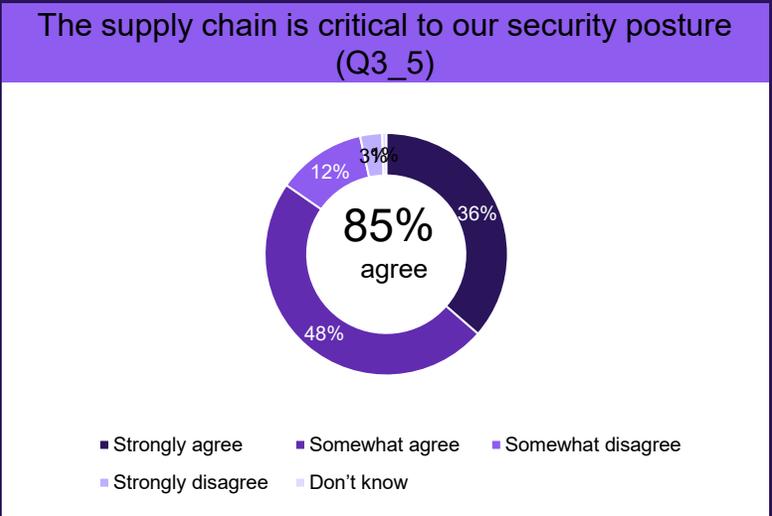


I expect GenAI to significantly improve our security operations (Q7_4)



723 respondents

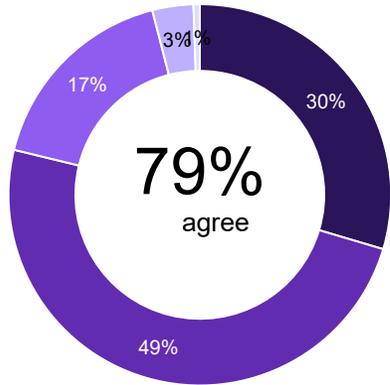
Security Concerns



750 respondents

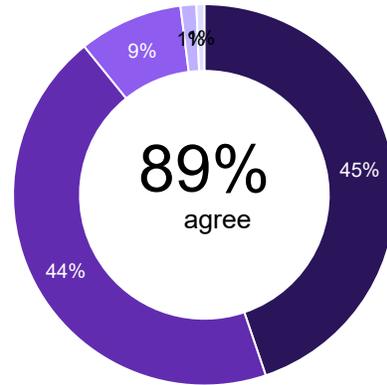
The innovation security paradox

Balancing security and innovation is a challenge for our organization (Q3_3)



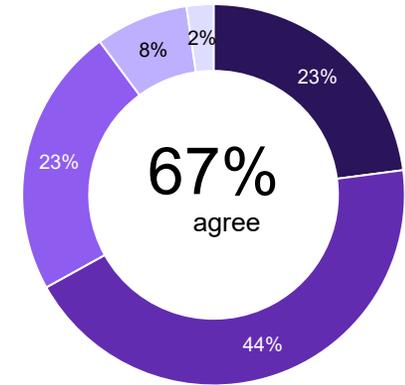
■ Strongly agree ■ Somewhat agree ■ Somewhat disagree
■ Strongly disagree ■ Don't know

Security plays a critical part in the development of new innovations (Q3_4)



■ Strongly agree ■ Somewhat agree ■ Somewhat disagree
■ Strongly disagree ■ Don't know

We are fearful that new innovations will increase our attack surface (Q3_6)



■ Strongly agree ■ Somewhat agree ■ Somewhat disagree
■ Strongly disagree ■ Don't know



Sustainability strategy priorities

750 respondents

Sustainability: AI, innovation and data centers

Combination of 'strongly agree' and 'somewhat agree' (Q20)

81%

agree that AI is a crucial tool for optimizing resource use and enhancing sustainability in their operations

79%

believe the benefits of AI outweigh its environmental impacts

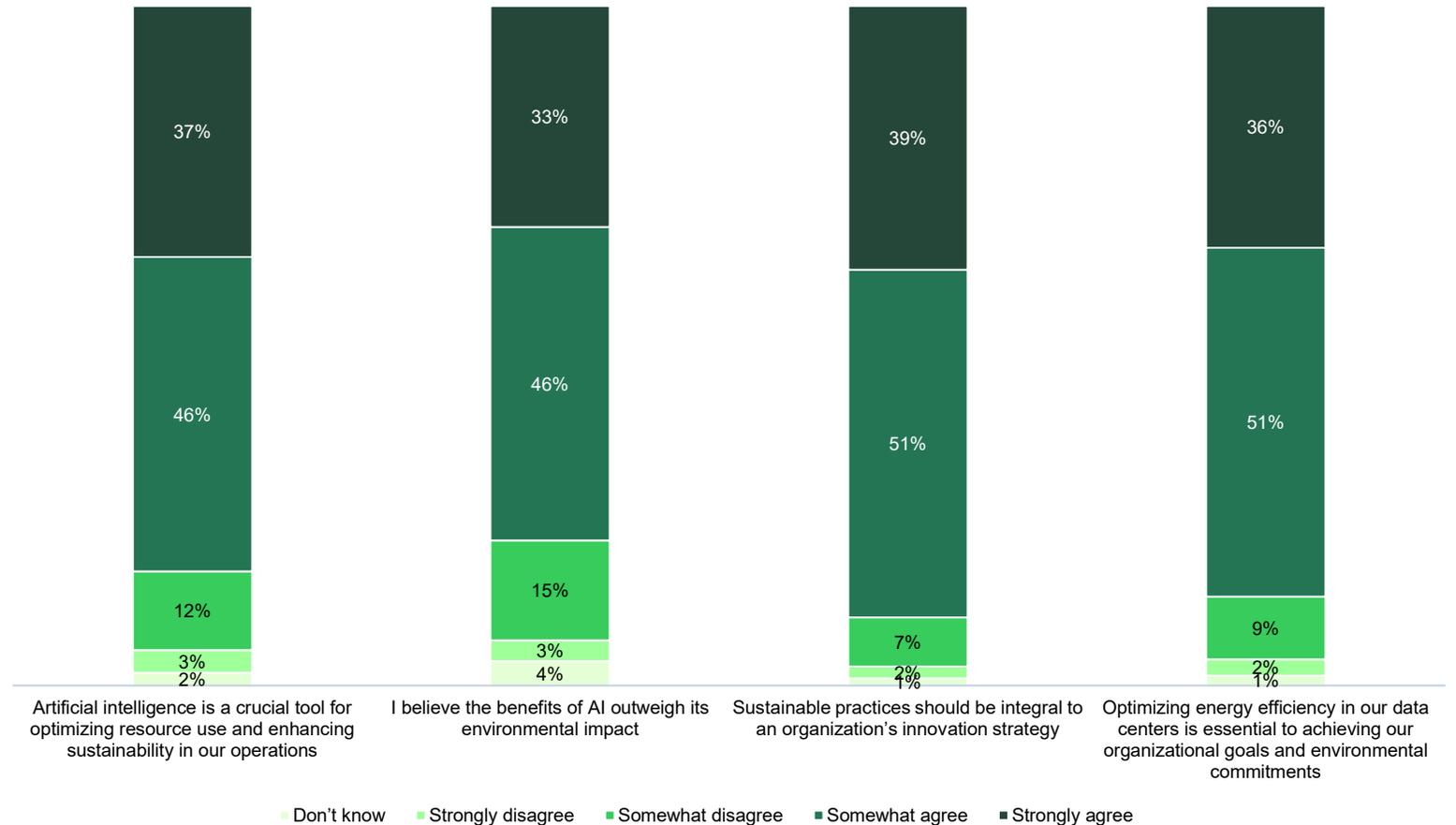
90%

agree that sustainable practices should be integral to an organization's innovation strategy

87%

agree that optimizing energy efficiency in their data centers is essential to achieving their goals and environmental commitments

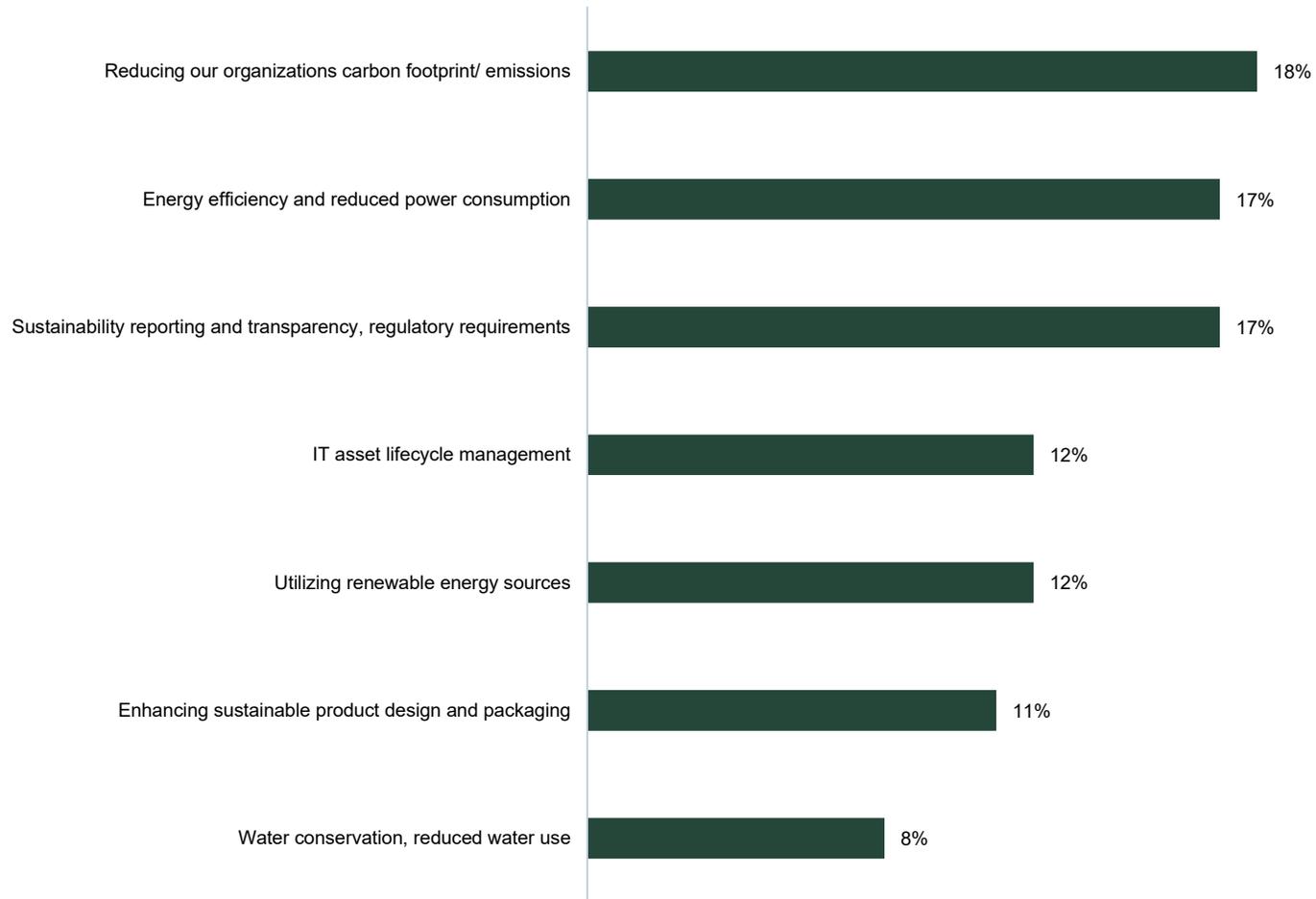
To what extent do you agree or disagree with the following (Q20)



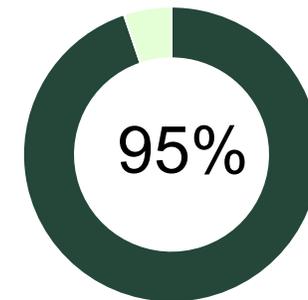
750 respondents

Sustainability strategies

Top priority for sustainability strategy (Q19rank1)



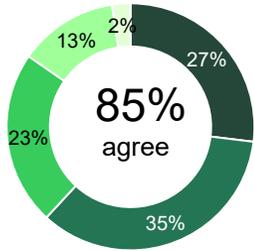
of organizations have a sustainability strategy (Q19combi)



750 respondents

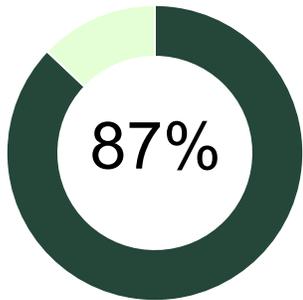
Impact of AI on sustainability

Concern over the environmental impact of organization's AI technologies (Q21)

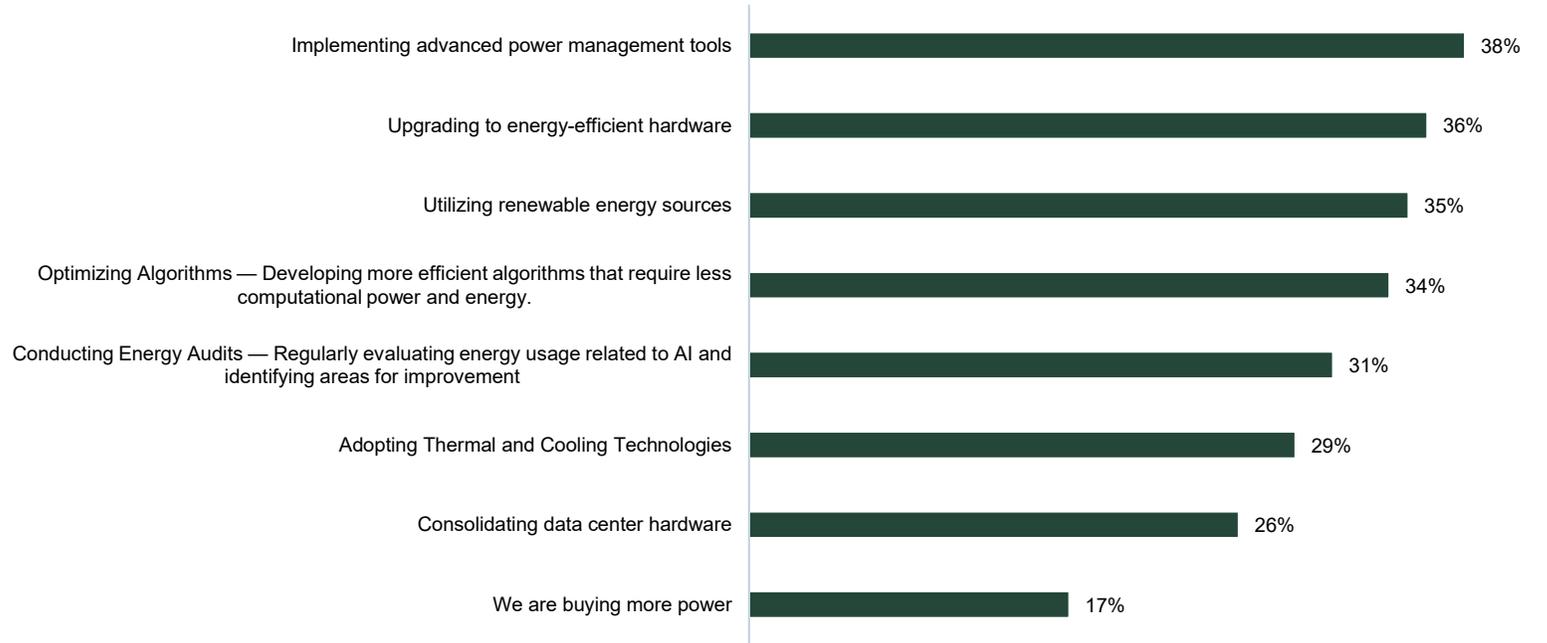


Very concerned Somewhat concerned A little concerned
Not at all concerned Don't know

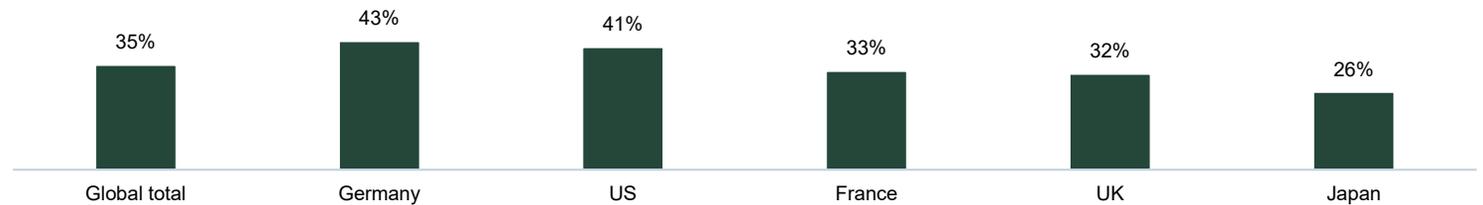
of organizations are taking steps to addressing the increasing energy demands of AI (Q22)



Steps being taken to address the increasing energy demands of AI (Q22)

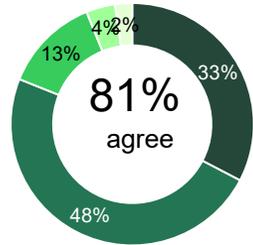


Utilizing renewable energy sources by country (Q22)



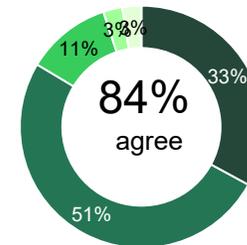
Tech buying criteria & 3rd party help

We need the help of a third-party partner to achieve our sustainability goals (Q20_1)



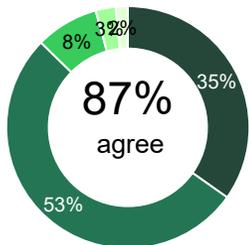
■ Strongly agree ■ Somewhat agree ■ Somewhat disagree
■ Strongly disagree ■ Don't know

Collaborating with a third-party partner would simplify our efforts to implement circular IT practices (Q20_7)



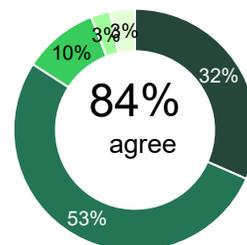
■ Strongly agree ■ Somewhat agree ■ Somewhat disagree
■ Strongly disagree ■ Don't know

Sustainable design and energy efficiency are key factors when selecting solutions for my organization (Q20_2)



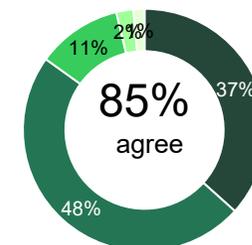
■ Strongly agree ■ Somewhat agree ■ Somewhat disagree
■ Strongly disagree ■ Don't know

Circularity in AI hardware is an important consideration in our IT asset management system (Q20_9)



■ Strongly agree ■ Somewhat agree ■ Somewhat disagree
■ Strongly disagree ■ Don't know

We are prioritizing the use of sustainable products and solutions (Q20_6)



■ Strongly agree ■ Somewhat agree ■ Somewhat disagree
■ Strongly disagree ■ Don't know



Methodology & Scope

Methodology:

Dell Technologies commissioned independent market research specialist Vanson Bourne to conduct this research. The study surveyed 750 respondents equally split across small, media and large enterprises in USA, UK, Germany, France and Japan. These organizations are from a range of sectors, including financial services and insurance, manufacturing, retail, healthcare and life sciences as well as energy and utilities.

All respondents either are the final decision-makers, drive or influence innovation in their organization, with 20% of respondents being in the C-Suite. Of the total number of respondents, 325 are IT decision-makers (ITDMs) and 325 are business decision-makers (BDMs).

The interviews were conducted online and via telephone in November and December 2024 and were undertaken using a rigorous multi-level screening process to ensure that only suitable candidates were given the opportunity to participate.

About Dell Technologies:

Dell Technologies helps organizations and individuals build their digital future and transform how they work, live and play. The company provides customers with the industry's broadest and most innovative technology and services portfolio for the data era. www.dell.com.

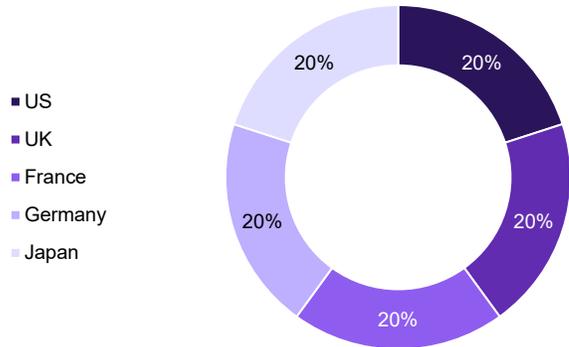
About Vanson Bourne:

Vanson Bourne is an independent specialist in market research for the technology sector. Their reputation for robust and credible research-based analysis is founded upon rigorous research principles and their ability to seek the opinions of senior decision-makers across technical and business functions, in all business sectors and all major markets. www.vansonbourne.com.

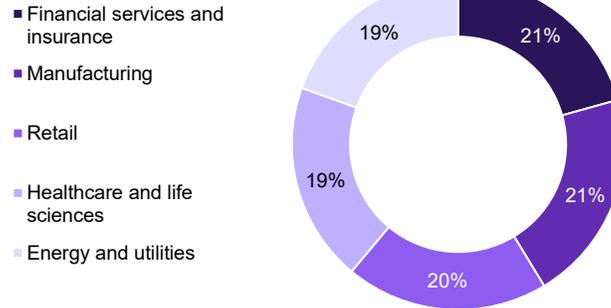
750 respondents

Profiling and firmographics

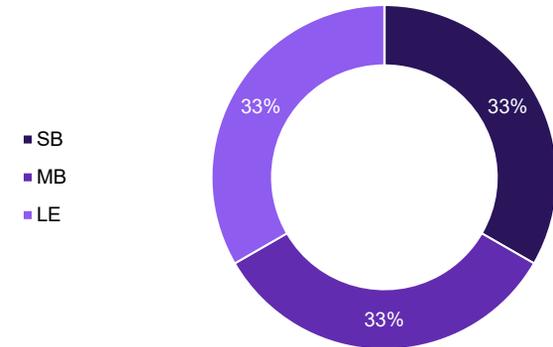
Respondent country



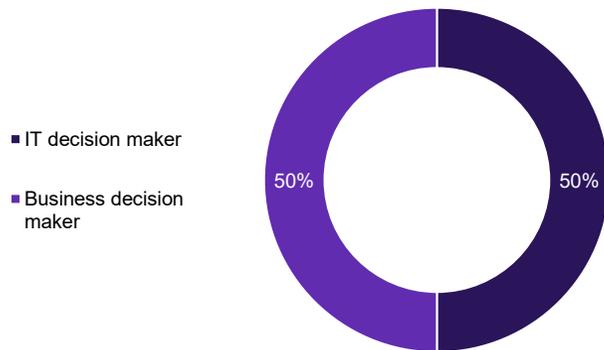
Vertical



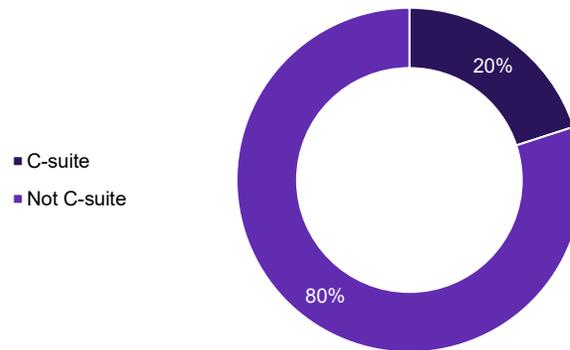
Segment



Respondent type



Respondent position



Respondent initiative responsibility

- I am a final decision maker/ have overall responsibility
- I am one of the final decision makers/ have significant responsibility
- I am an influencer of decision making/ have some responsibility

