

Dell Technologies 2025 Survey



2,850 business and IT decision makers across 40 locations, all segments,
June 2025 (*US, UK, DE, FR and JP published in Feb 2025).*

 Dell Technologies



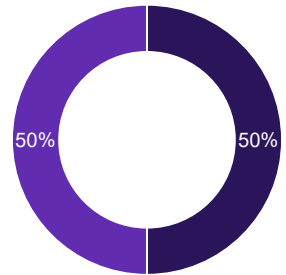
VansonBourne

2,850 respondents

Profiling and firmographics

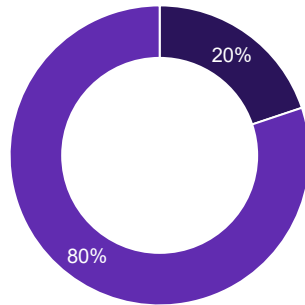
Respondent type

- IT decision maker
- Business decision maker



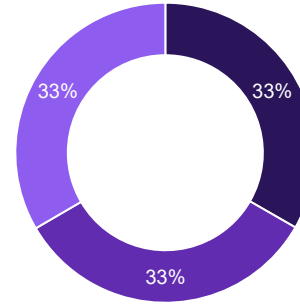
Respondent position

- C-suite
- Not C-suite



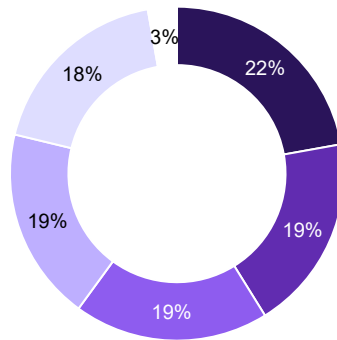
Segment

- SB
- MB
- LE



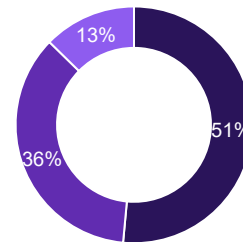
Vertical

- Financial services and insurance
- Energy and utilities
- Retail
- Healthcare and life sciences
- Manufacturing
- Other vertical



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



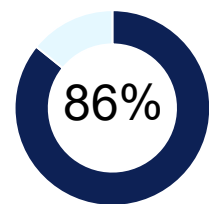


Business strategies and innovation

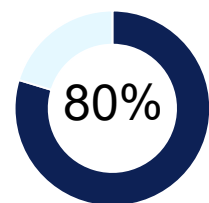
2,850 respondents

Business strategy influences

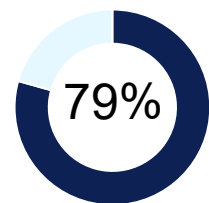
Key part of business strategy (Q1)



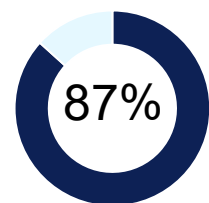
say **innovation** is a key part of their organization's business strategy



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

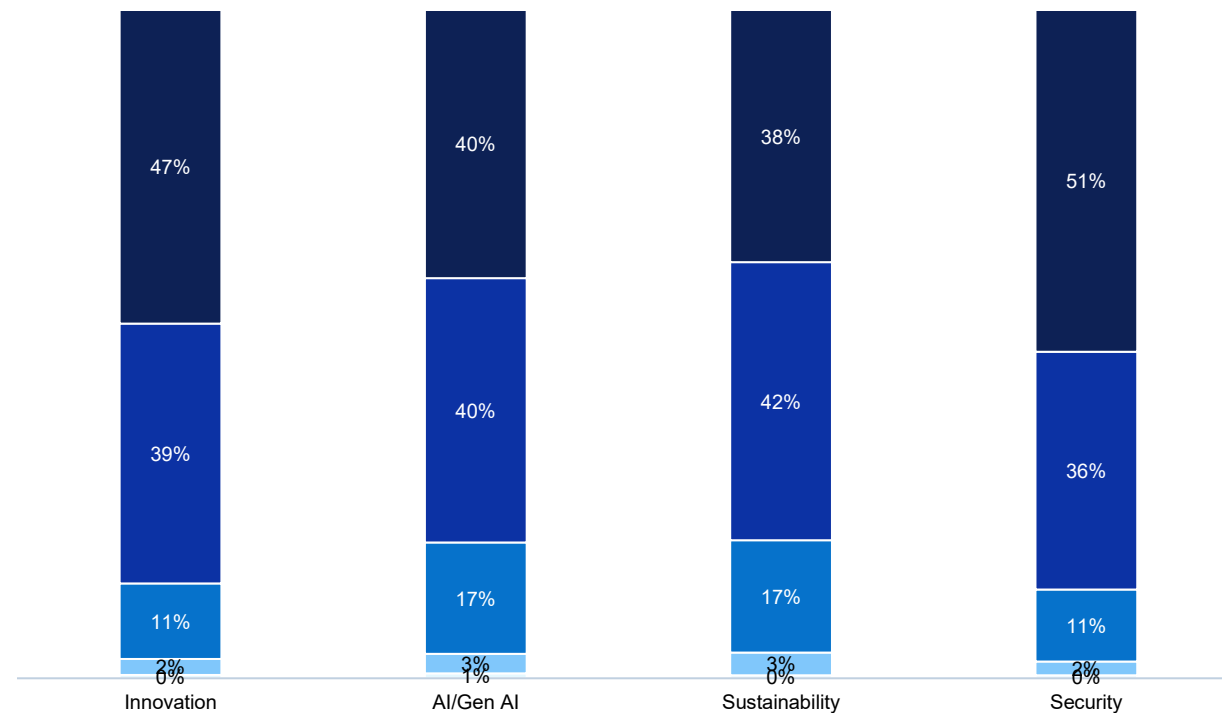


say **sustainability** is a key part of their organization's business strategy



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

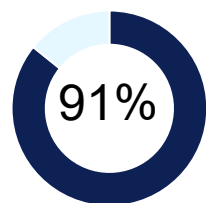
Role the following play in respondents' organizations business strategies (Q1)



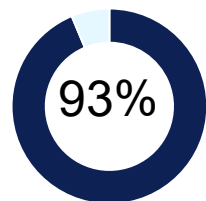
- It is a key part of our business strategy and is unlocking benefits across our organization already
- It is a key part of our business strategy and will unlock benefits across our organization in the future
- We recognize it is important to have within business strategy, but we don't currently have 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

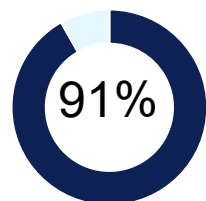
Experience challenges (Q2)



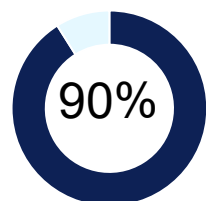
experience challenges when integrating **innovation** into their business strategies



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

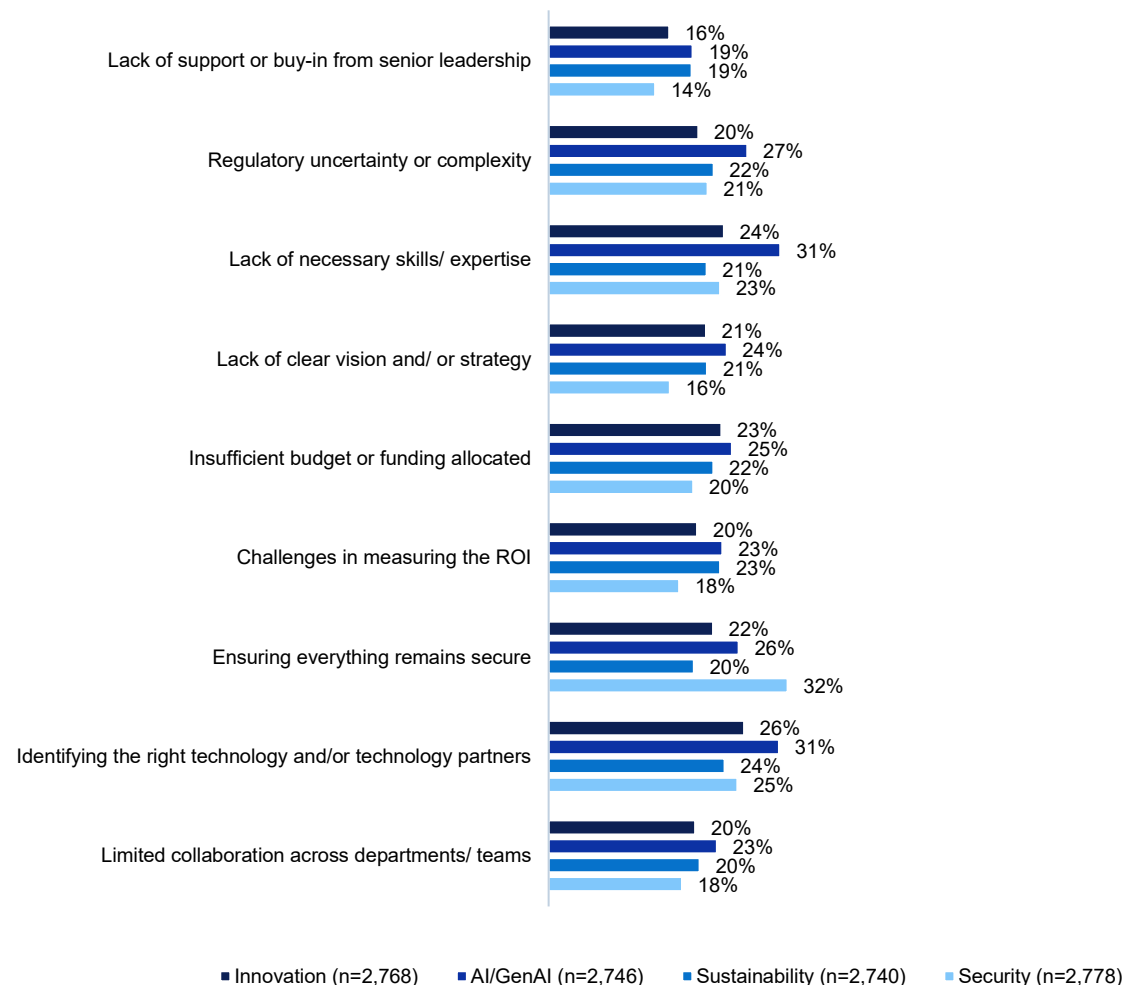


experience challenges when integrating **sustainability** into their business strategies



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 Lack of necessary skills/ expertise
- #3 Insufficient budget or funding allocated

2,768 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

2,746 respondents

Sustainability - top 3 challenges (Q2)

- #1 Identifying the right technology and/or technology partners
- #2 Challenges in measuring the ROI
- #3 Regulatory uncertainty or complexity

2,740 respondents

Security - top 3 challenges (Q2)

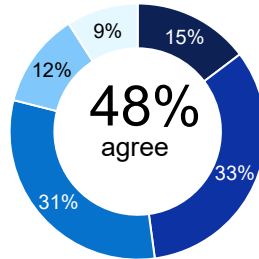
- #1 Ensuring everything remains secure
- #2 Identifying the right technology and/or technology partners
- #3 Lack of necessary skills/ expertise

2,778 respondents

2,850 respondents

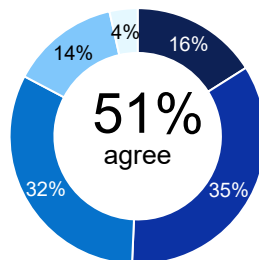
Keeping pace with the industry

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)

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

Poor customer service

Because of government regulations and resources

We have at least 1500 customers a day

We have to become more agile and adapt to business needs much quicker. However, we are getting better in this field.

I think the AI feature has to be fully implemented by our company. So then we will become more stronger to face problems like this.

turnover of quality staff and the lack of people that are quality trainers

To adapt the current technology solutions properly.

Threats are coming from many different sources.

Resource challenges results in struggling to keep up with the pace.

There come to few facts like legacy systems, cultural resistance, market saturation

Lack of qualified engineers

Because some of our technology is a little outdated and we have to work with legacy systems

because our budget is limiting in terms of the new innovations we can implement

Lack of budget and skilled employees is the biggest issue

There is constant change happening and its a challenge to upgrade quickly enough to keep pace with all changes

Staying abreast of competitors while transforming legacy on a limited budget

The challenge is embedding - we want to change at pace but we need to bring colleagues on the journey and a lack of understanding or mixed messages can lose them

1,364 respondents

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

We are constantly innovating and coming up with new idea for security

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

With security measures and codes

Going through reports of past operations help us navigate deficiencies in the company that can better tackle further disruptions in the job.

There always trying new tactics to make sure up to date

we do a lot

What we do to keep up with the pace of disruption is to keep updating and learning new safer methods

We have a dedicated team that monitors threats and will dispose of them as they arise.

Try to ensure that business critical teams are balanced with innovation focused projects

Making staying up to date on the latest technology and market trends a top priority for the business.

Market research, peer forums, vendor contact and attendance of enterprise events

get talents in the keep us secure

By acknowledgement of the disruption and a as a team working through to our goals

We have central It and working groups that support with knowledge and learning to keep our business up to date

By redirecting available manpower to other areas of the business to help cover the current disruption until the status quote is

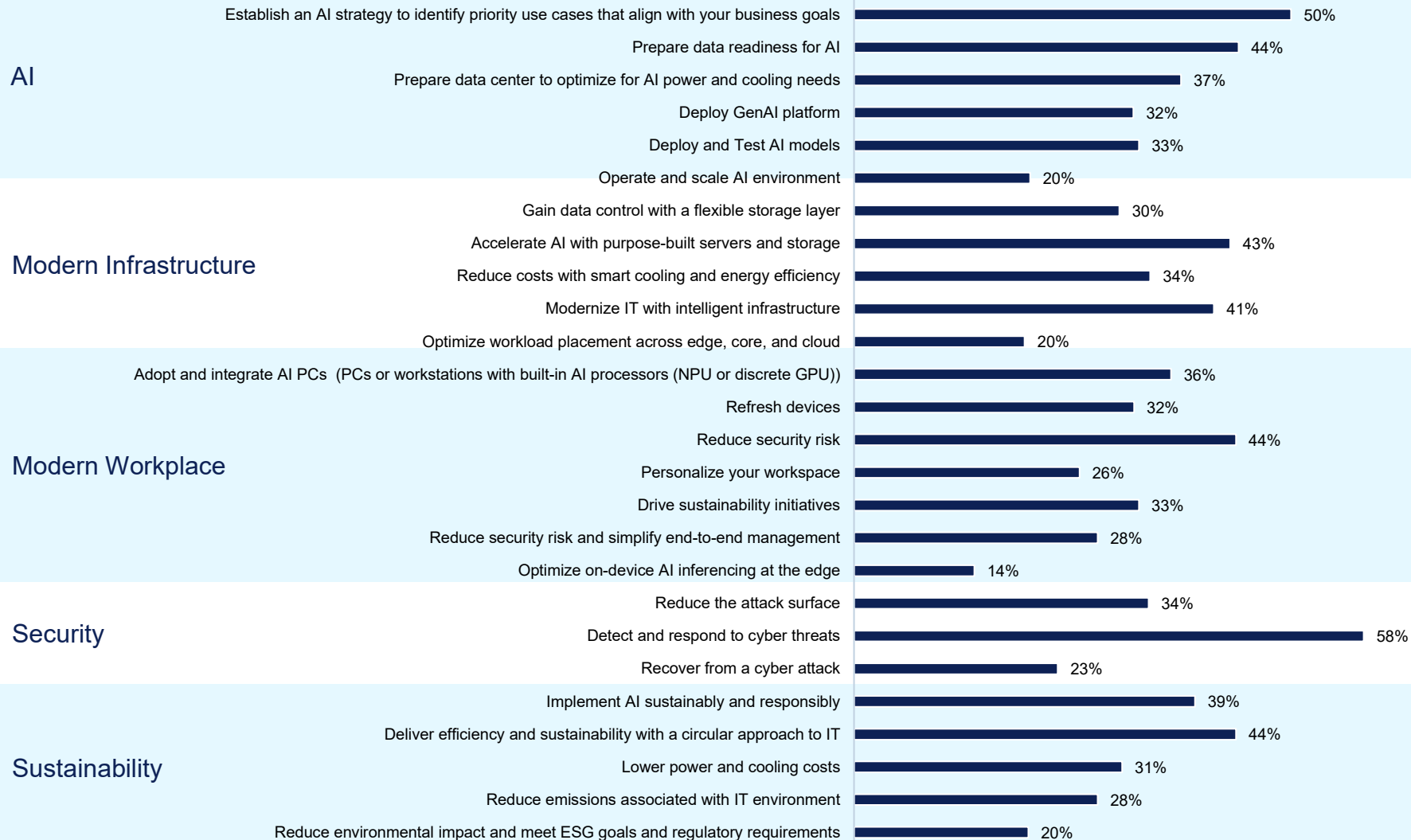
We keep up with the pace of disruption by always pushing the limits

We keep up with the pace of disruptions by maintaining our composure

1,228 respondents

2,850 respondents

Customer IT Initiatives planned for 2025 (M2^)



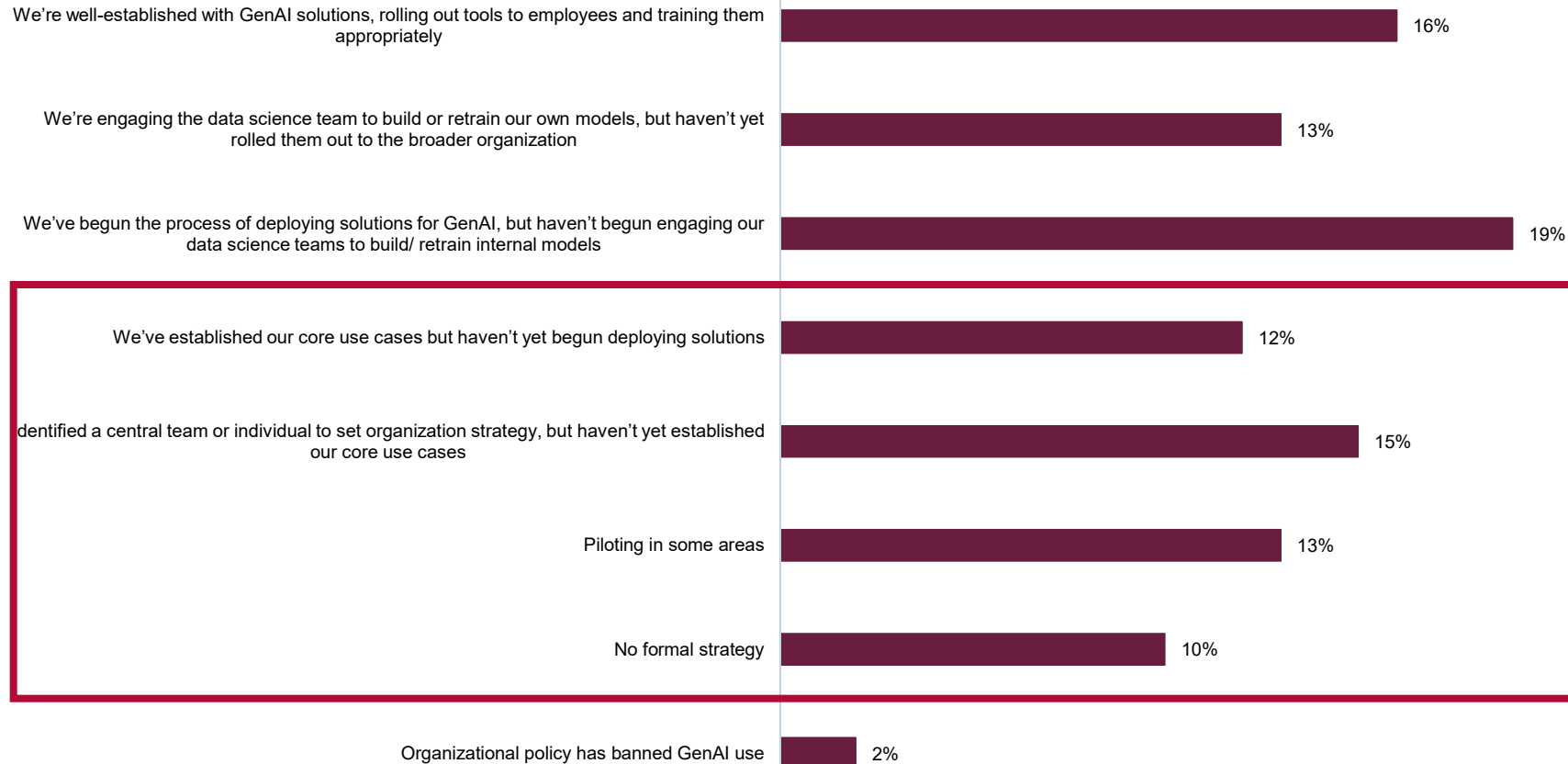


The role of artificial intelligence

2,850 respondents

AI/GenAI journey

Organization's GenAI journey (Q5)

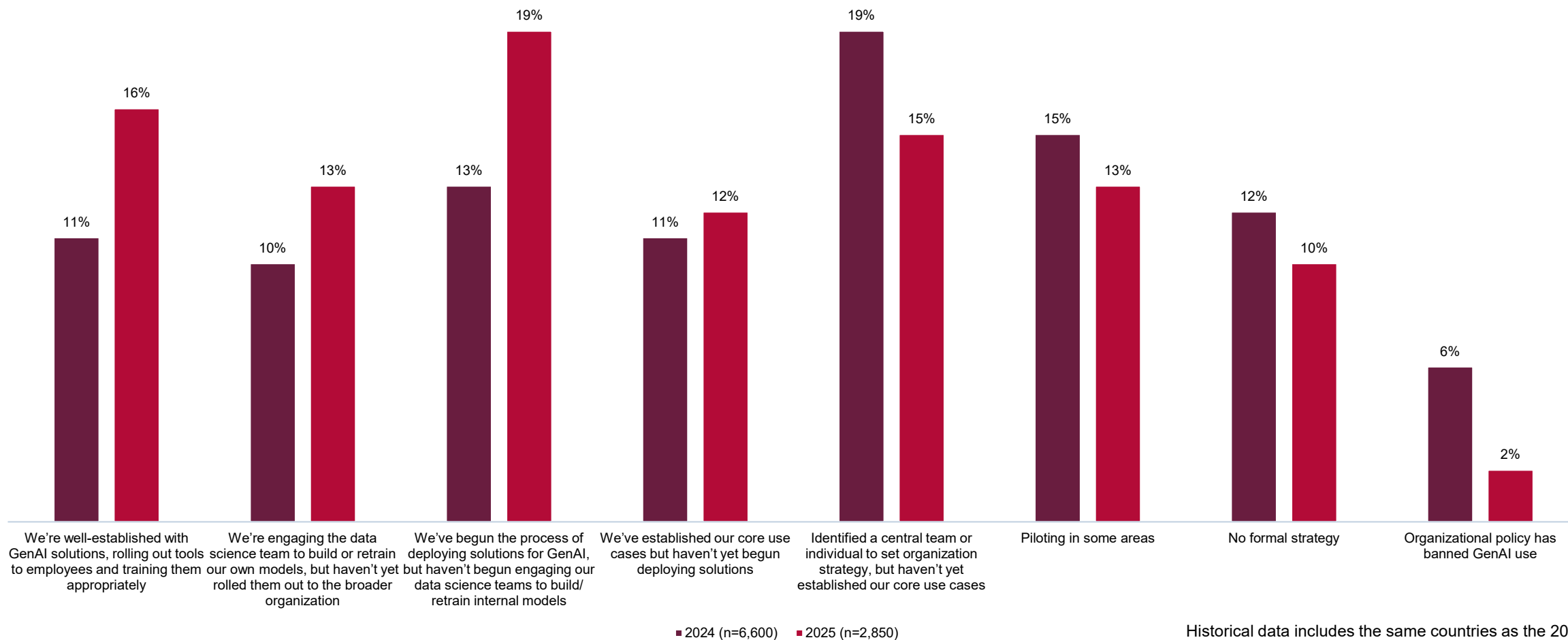


49%
of organizations at early to mid-stage of their journey

2,850 respondents

AI/GenAI journey

Organization's GenAI journey Year on Year (Q5)

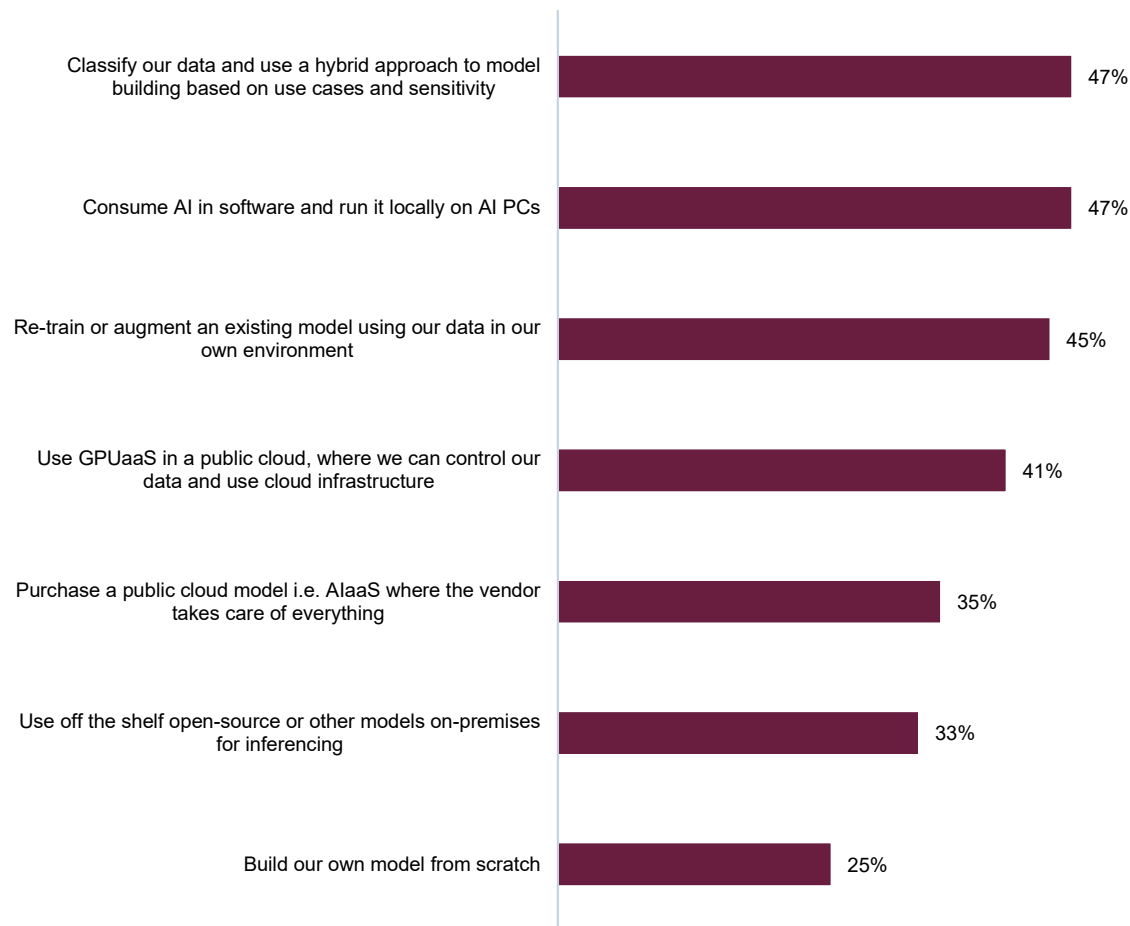


Historical data includes the same countries as the 2025 survey, but does not include SBs, Egypt or Philippines

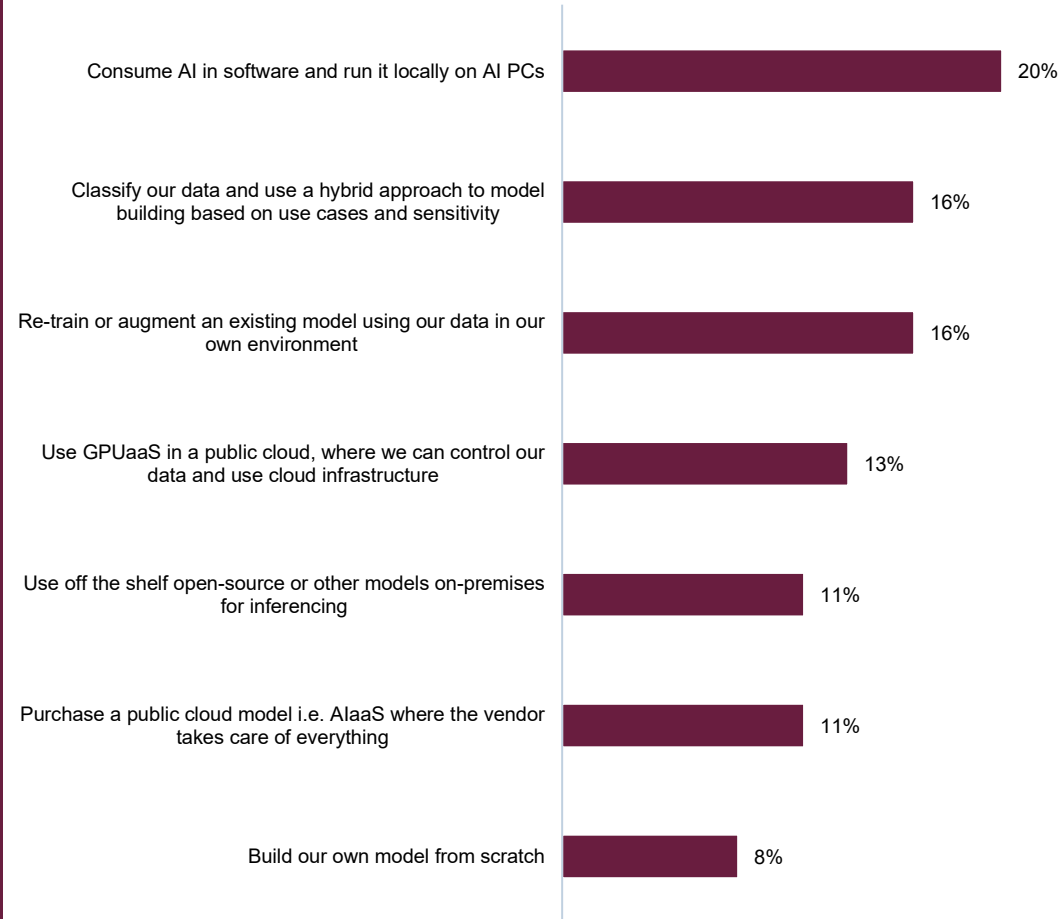
2,850 respondents

AI/GenAI strategy

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



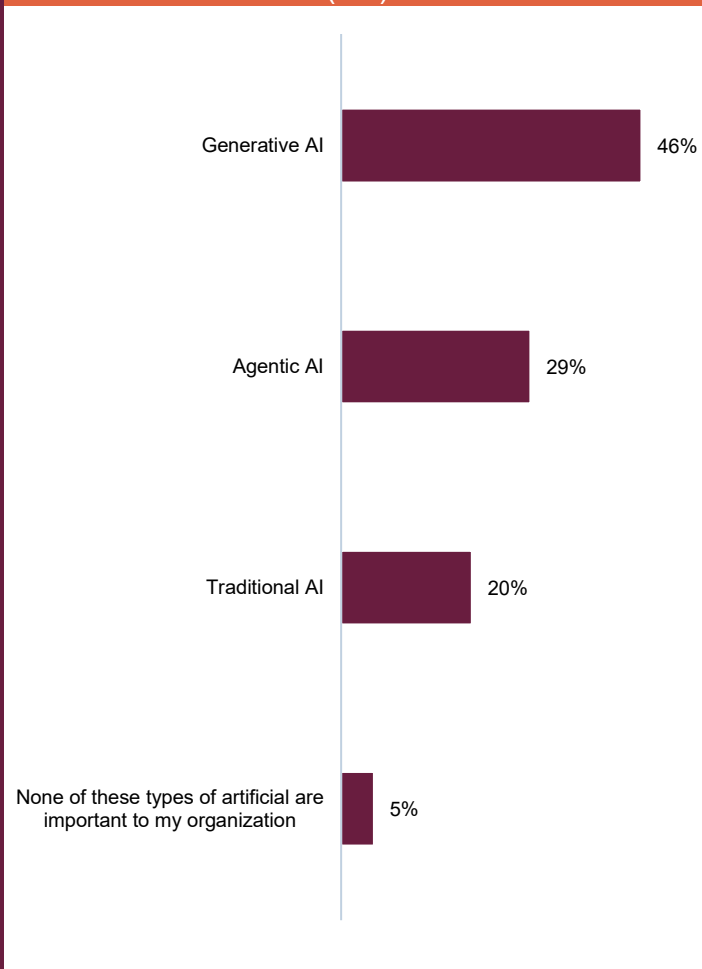
Most likely type of procurement/usage (Q6rank1)



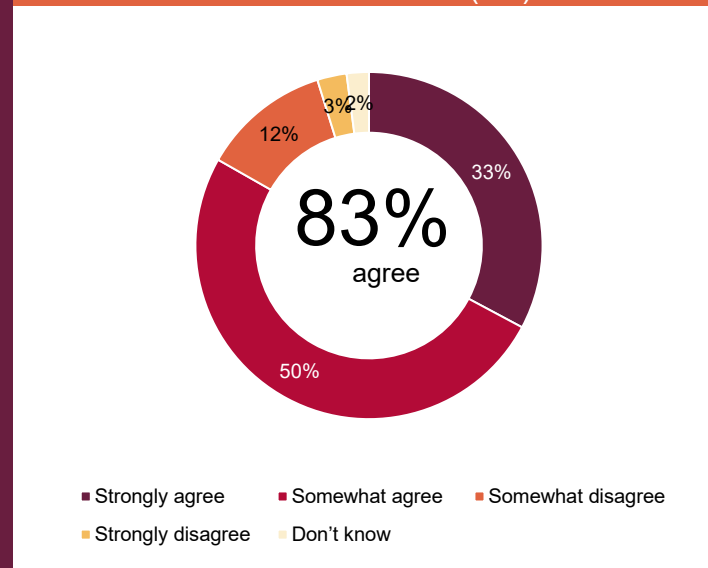
2,850 respondents

Importance of artificial intelligence

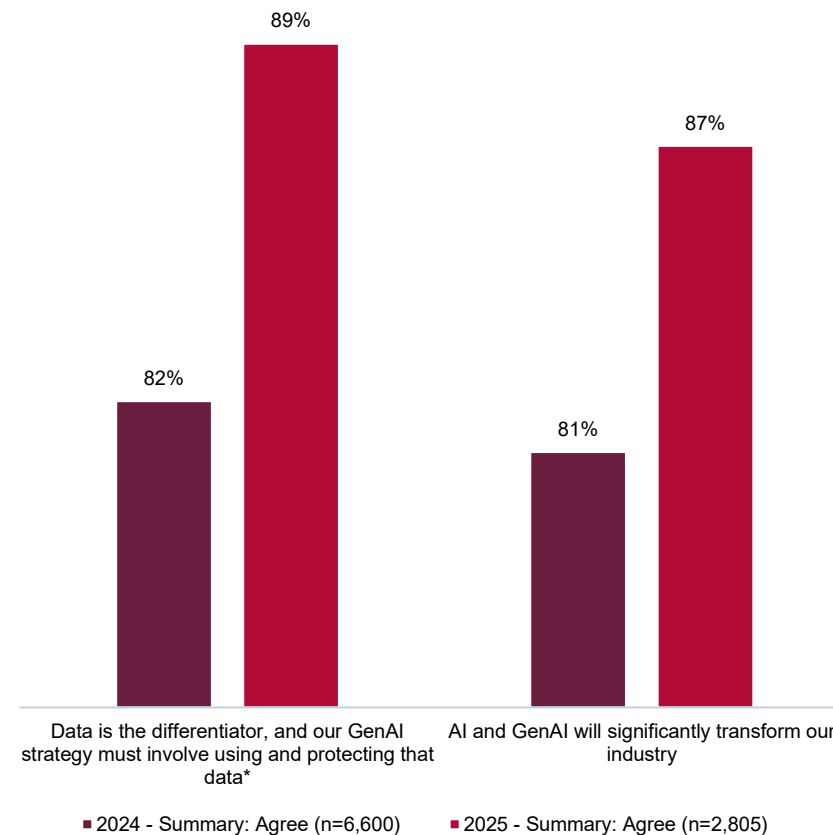
Most important type of AI for my organization (Q4)



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



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



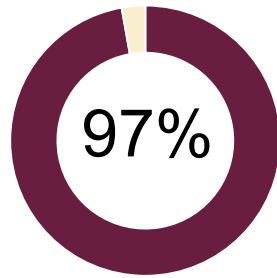
Historical data includes the same countries as the 2025 survey, but does not include SBs, Egypt or Philippines

2,805 respondents*

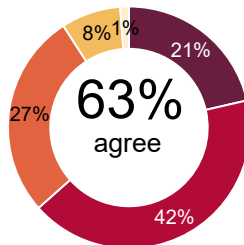
2,850 respondents

Artificial intelligence skills gap

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

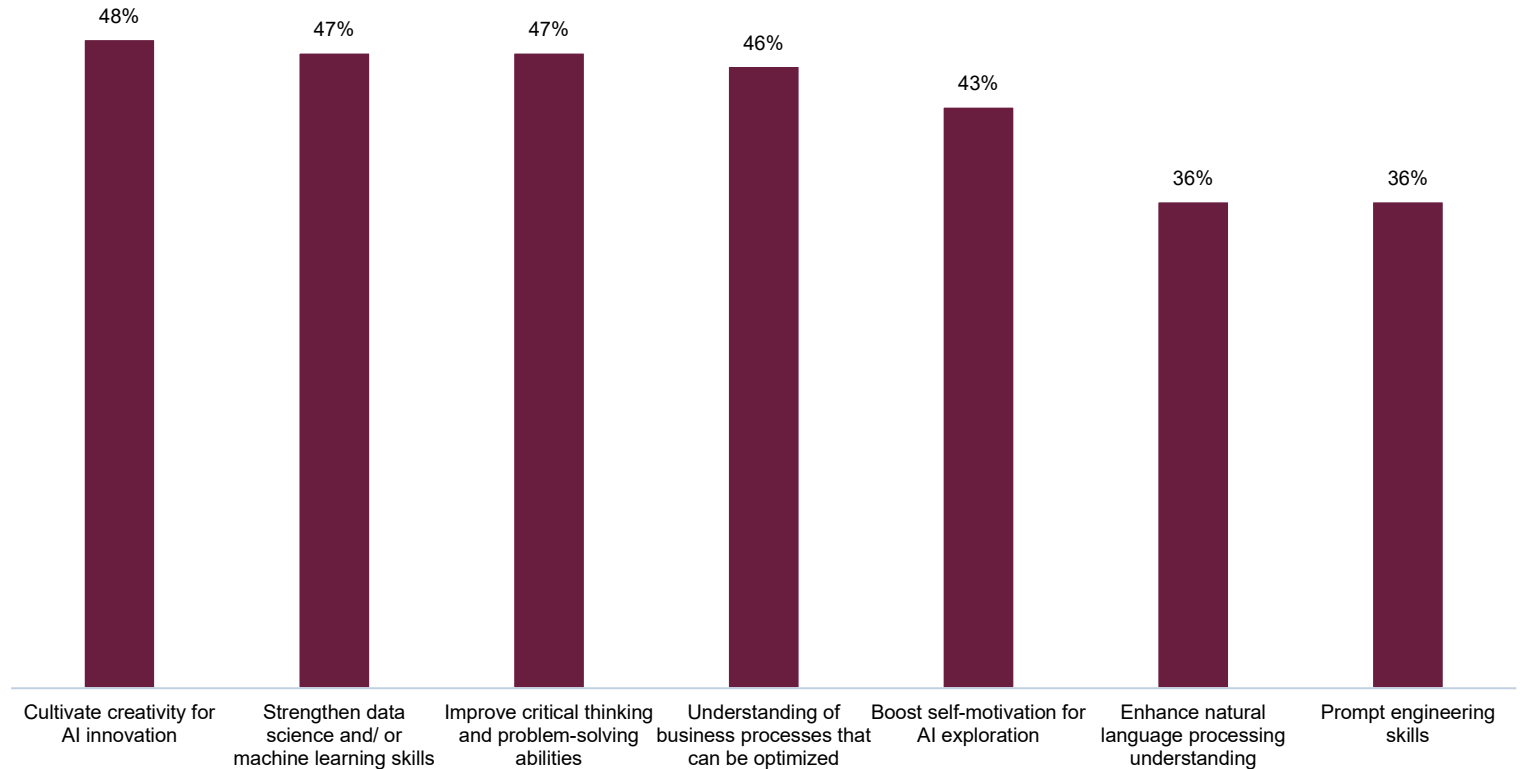


Employees within my organization do not fully understand how to implement GenAI securely (Q7_7)



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

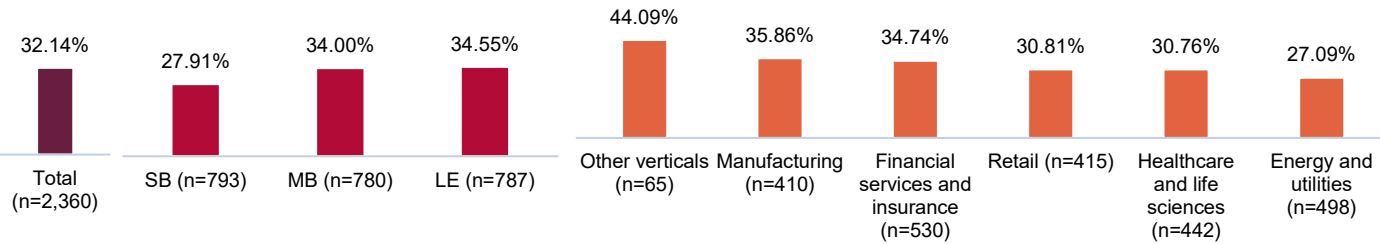
Skills that need to be developed to unlock the potential of AI (Q11)



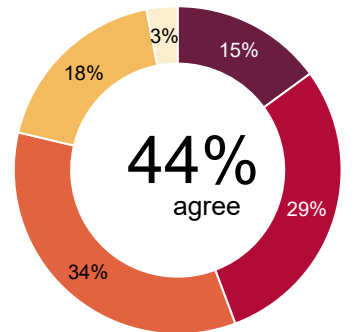
2,850 respondents

The ROI of artificial intelligence

Average expected return of investment from using artificial intelligence, by segment/vertical (Q10)

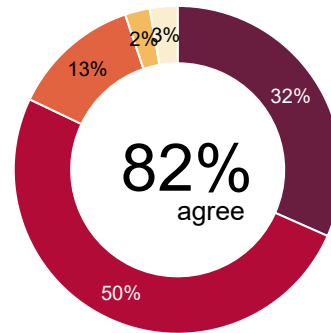


We have become pessimistic with the near-term value of AI (Q3_9)



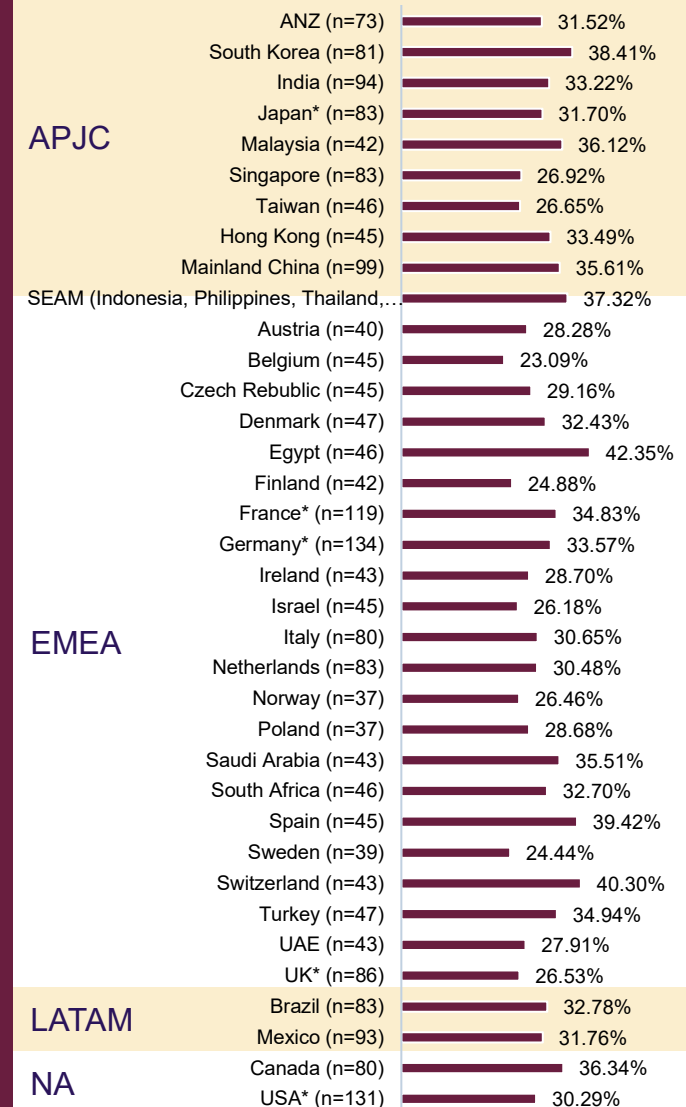
■ Strongly agree ■ Somewhat agree
■ Somewhat disagree ■ Strongly disagree
■ Don't know

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



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

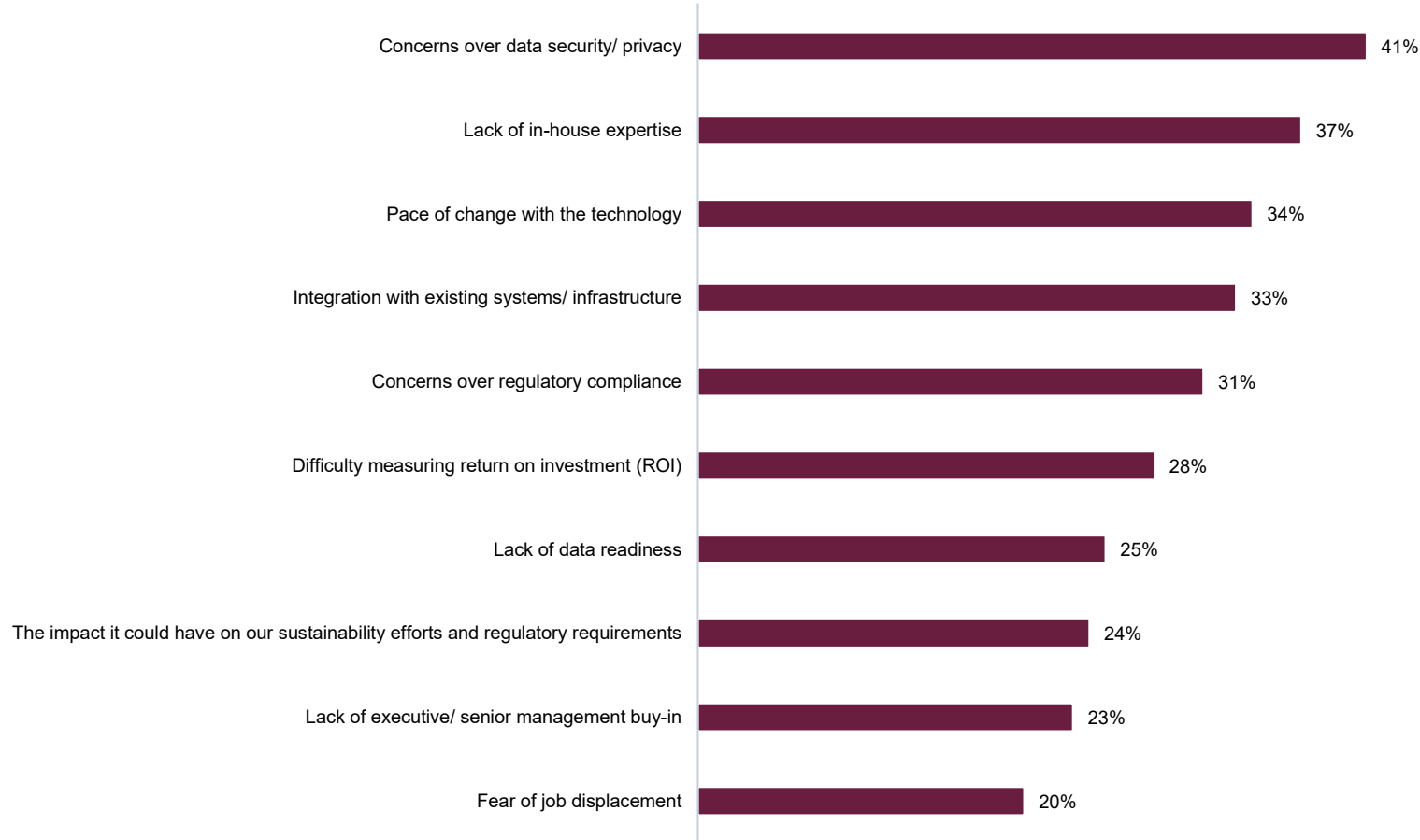
Average expected return of investment from using artificial intelligence, by country (Q10)



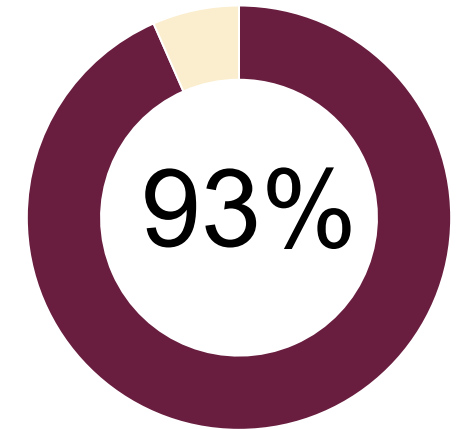
2,850 respondents

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)



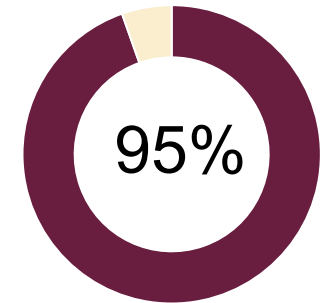
2,850 respondents

Data readiness challenges for AI/GenAI usage

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



95% of organizations face challenges when identifying, preparing and/or using data for AI/GenAI use cases (Q12)



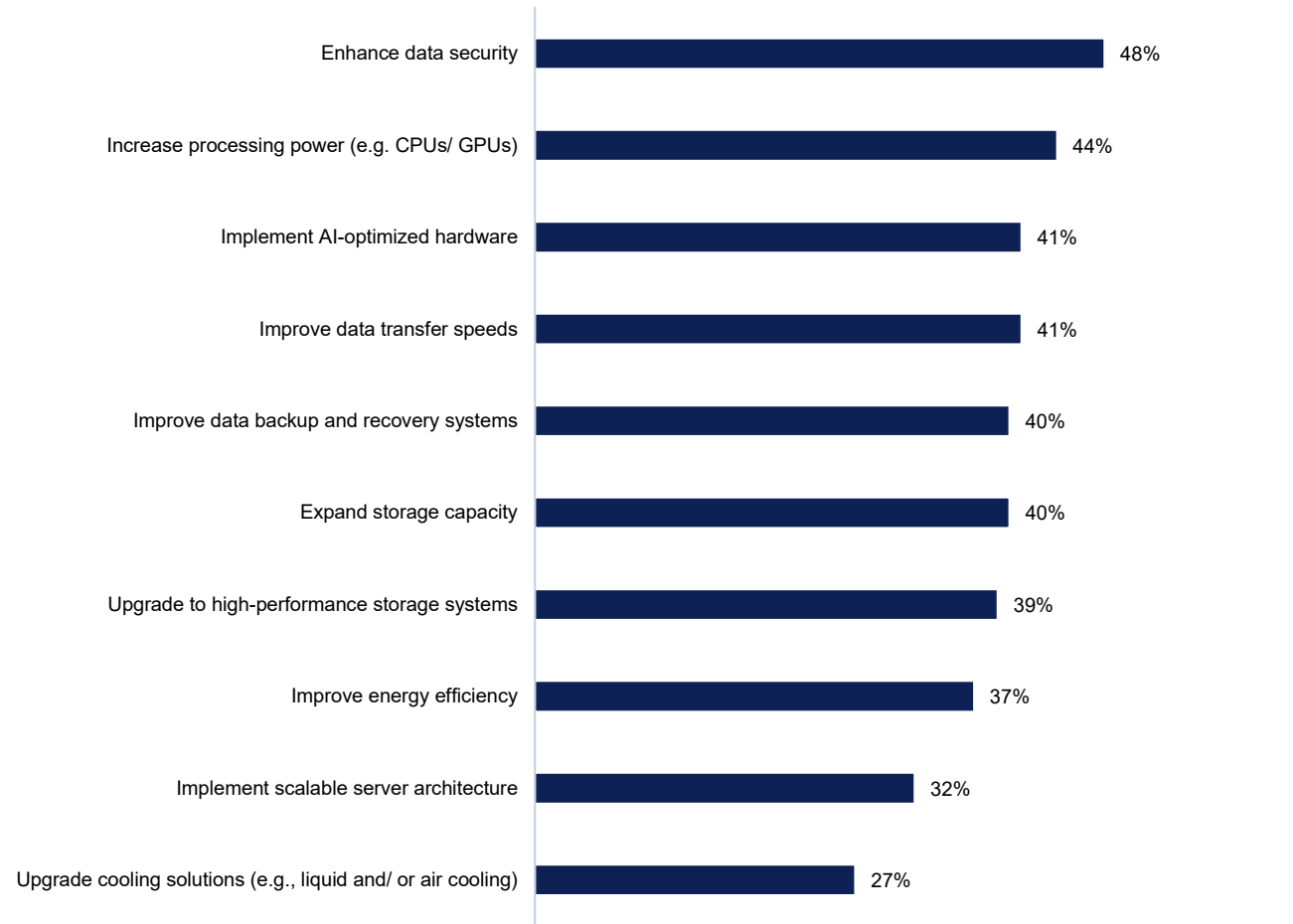


Modern Infrastructure

2,850 respondents

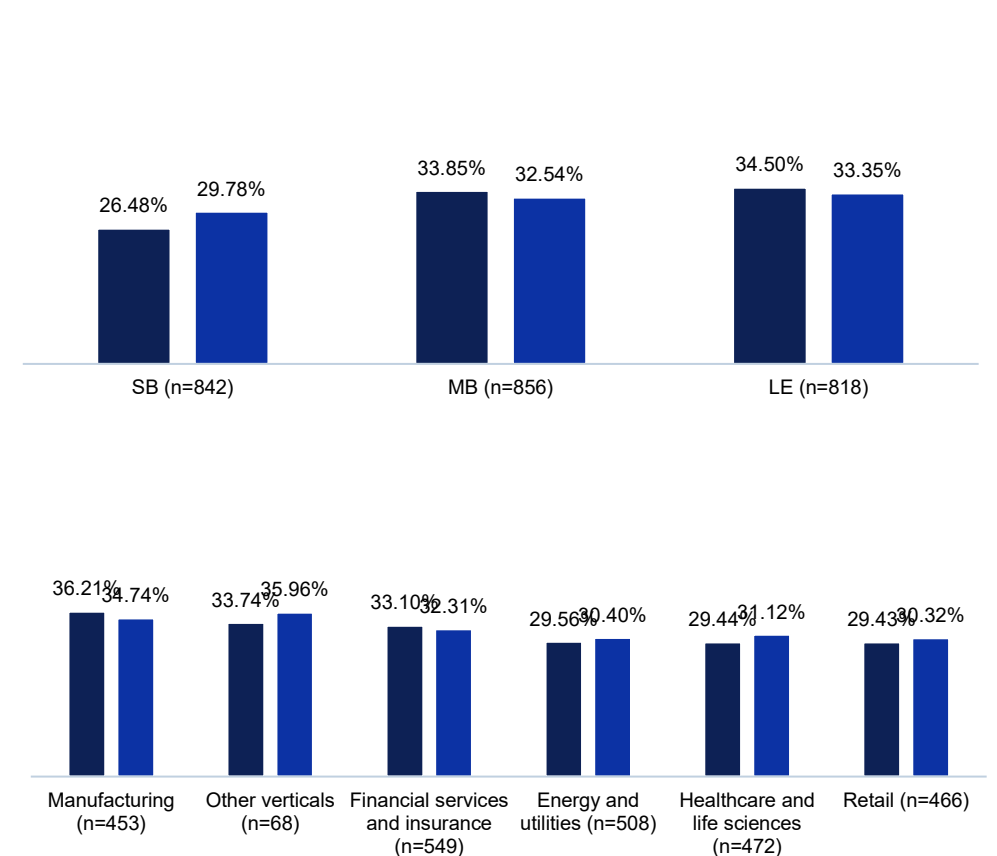
Storage and server upgrades

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



2,288 respondents

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



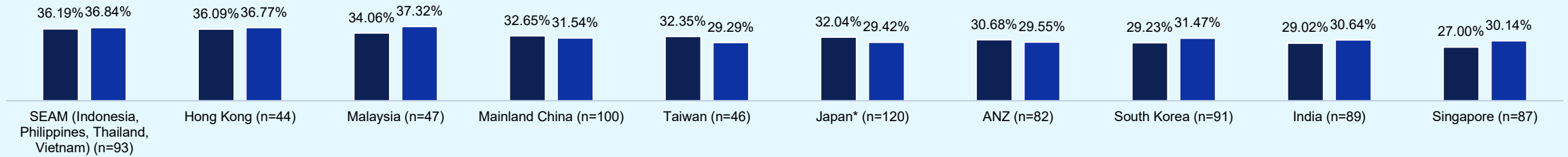
2,850 respondents

Storage and server upgrades

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

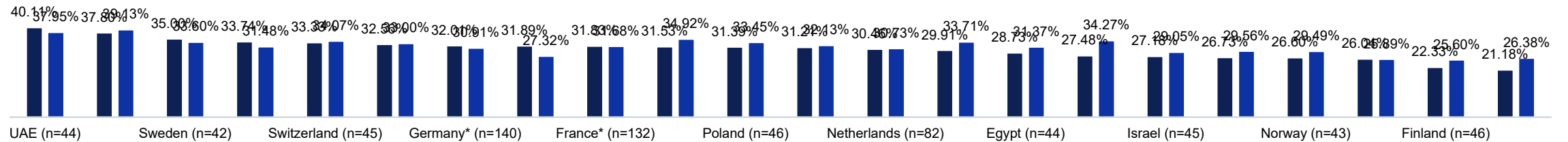
APJC

■ Servers ■ Storage systems



EMEA

■ Servers ■ Storage systems



LATAM

■ Servers ■ Storage systems



NA

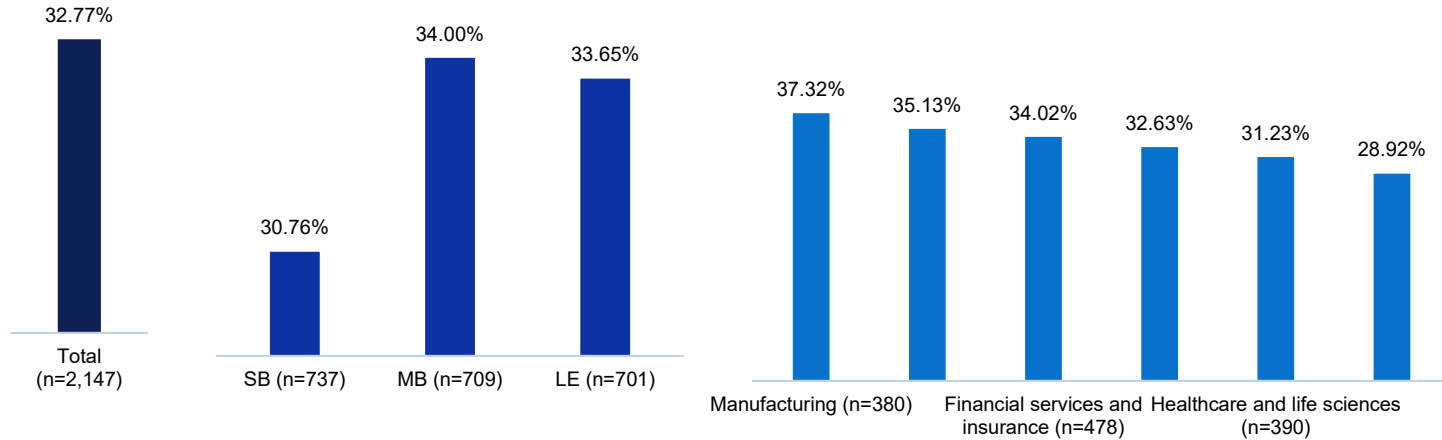
■ Servers ■ Storage systems



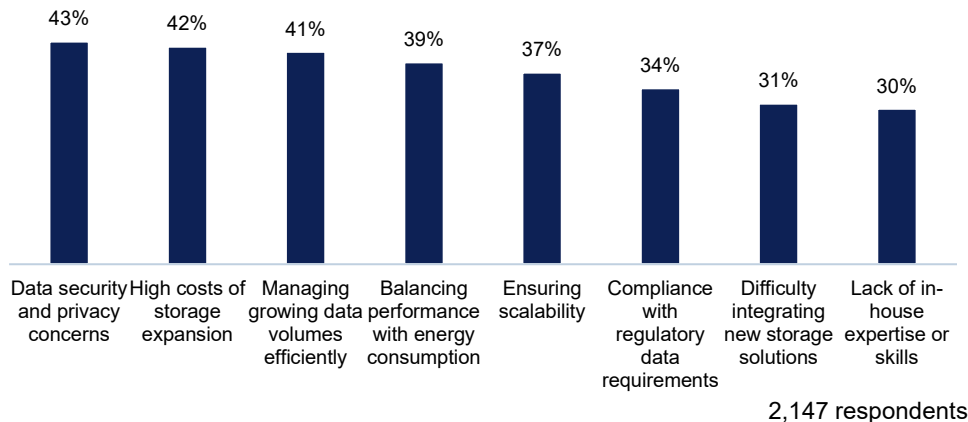
2,850 respondents

Increasing storage capacity

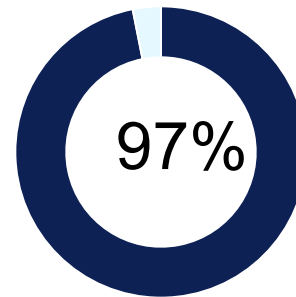
Average percentage increase to storage capacity as a result of data growth driven by AI, by segment/vertical (Q15)



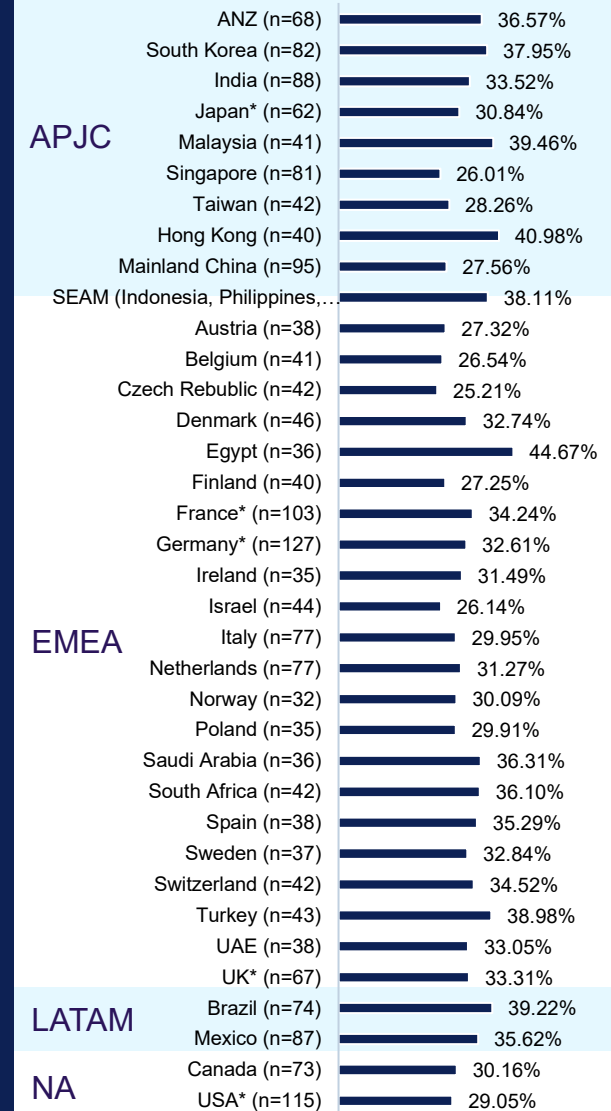
Expected challenges when increasing storage capacity (Q16)



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



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



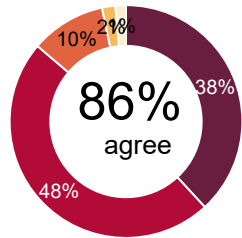


Modern Workplace

2,850 respondents

AI/GenAI and intuitive, personalized applications

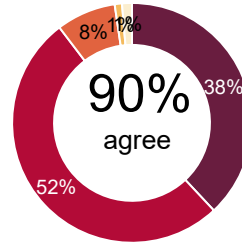
My organization plans to leverage GenAI to increase productivity, which will enhance the employee experience over the next 12 months (Q7_2)



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

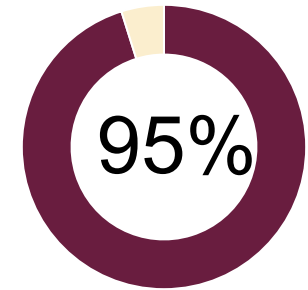
2,805 respondents

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

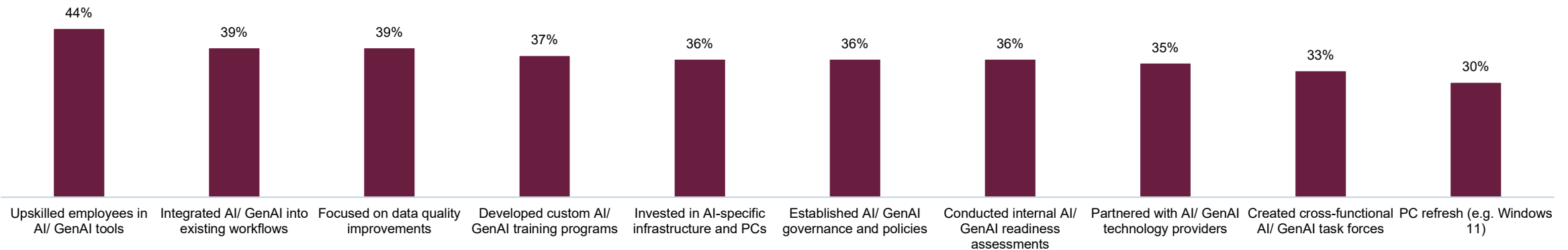


■ Strongly agree ■ Somewhat agree ■ Somewhat disagree
■ Strongly disagree ■ Don't know

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



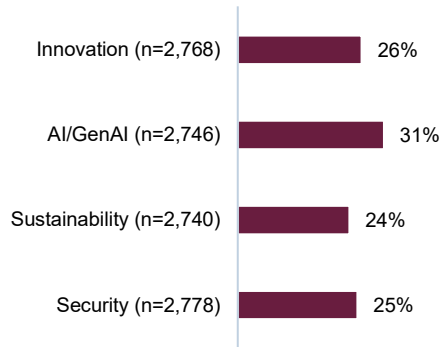
Steps taken towards using AI/GenAI for the deployment of more intuitive and personalized applications (Q8)



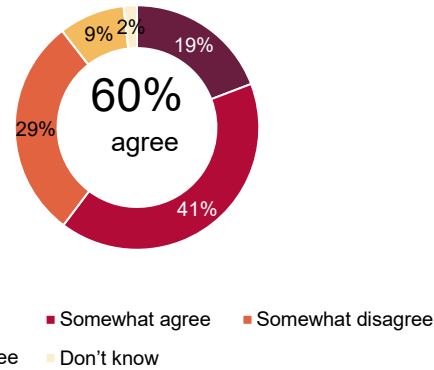
2,850 respondents

Modern workplace management

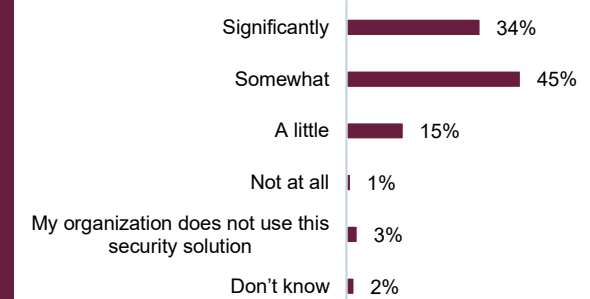
Organizations that find identifying the right technology and/or technology partners a challenge, in each of the following areas (Q2)



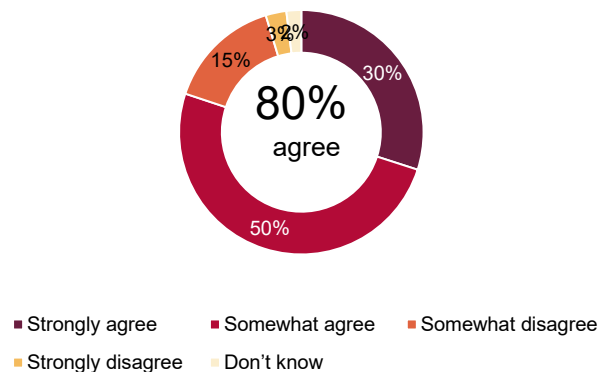
I'm concerned about my organization's ability to effectively manage our devices and protect our data (Q3_11)



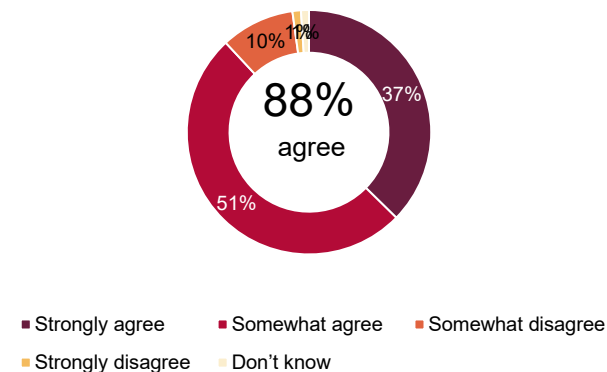
Extent endpoint security has increased confidence levels in organization's security posture (Q18)



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)



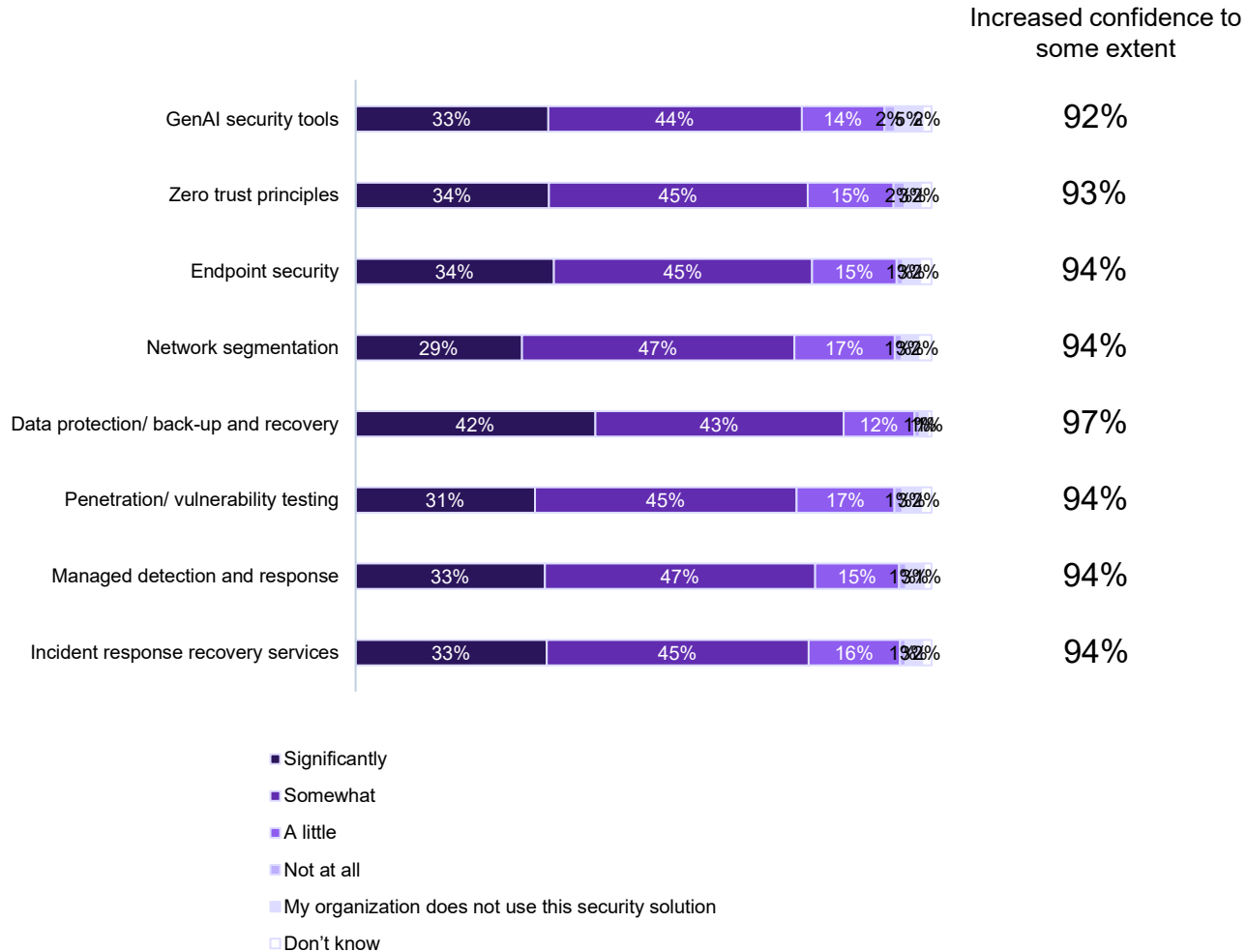


Security

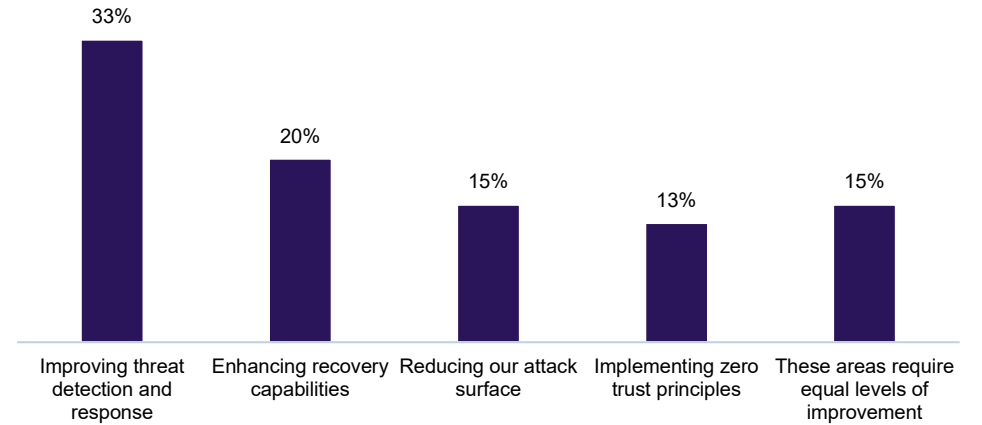
2,850 respondents

Importance of security

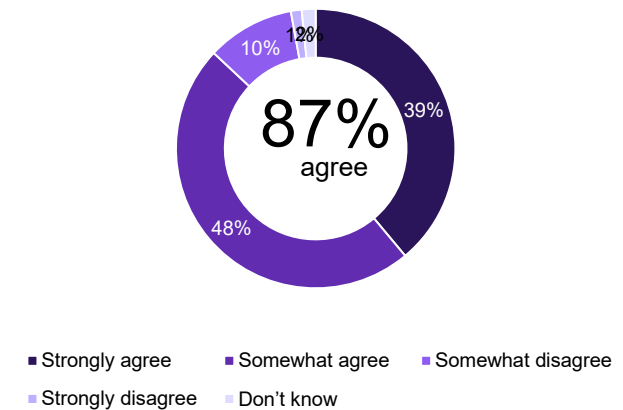
Security solutions most likely to have increased confidence levels in security posture (Q18)



Areas that require the most improvement (Q17)



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

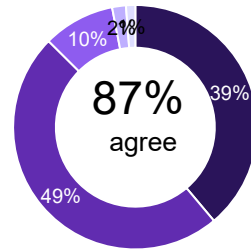


2,805 respondents

2,850 respondents

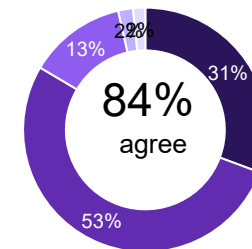
Security Concerns

The supply chain is critical to our security posture (Q3_5)



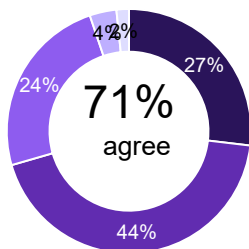
■ Strongly agree ■ Somewhat agree ■ Somewhat disagree
■ Strongly disagree ■ Don't know

When it comes to the detection and response to cyber threats, my organization could do better (Q3_7)



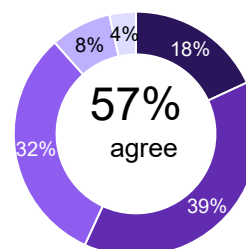
■ Strongly agree ■ Somewhat agree ■ Somewhat disagree
■ Strongly disagree ■ Don't know

Our data and intellectual property are too valuable to be placed in a GenAI tools where a third party may have access (Q7_6)



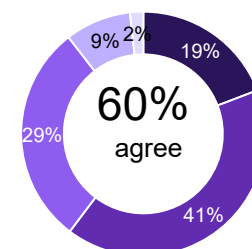
■ Strongly agree ■ Somewhat agree ■ Somewhat disagree
■ Strongly disagree ■ Don't know

Recovering the business to meet our SLAs would be difficult after a cyber attack (Q3_8)



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

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

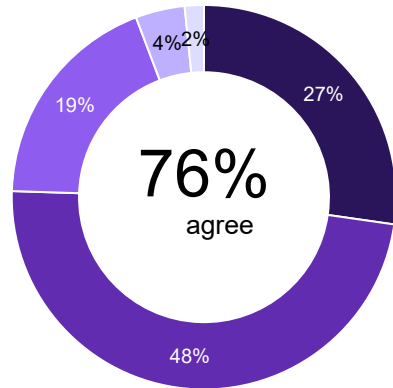


■ Strongly agree ■ Somewhat agree ■ Somewhat disagree
■ Strongly disagree ■ Don't know

2,850 respondents

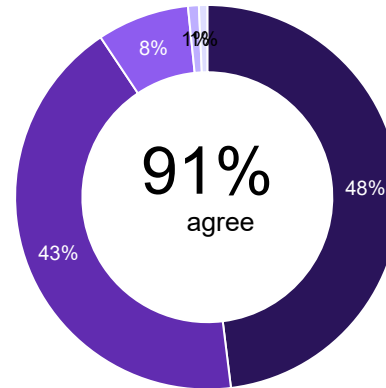
The innovation security paradox

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



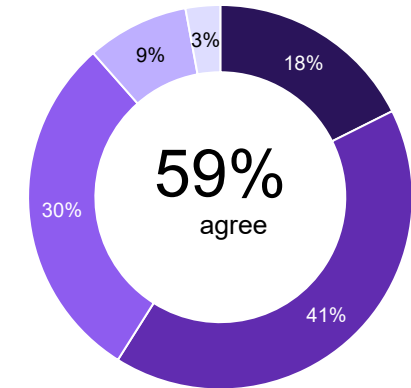
■ Strongly agree ■ Somewhat agree ■ Somewhat disagree
■ Strongly disagree ■ Don't know

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

2,850 respondents

Sustainability: AI, innovation and data centers

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

87%

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

81%

believe the benefits of AI outweigh its environmental impacts

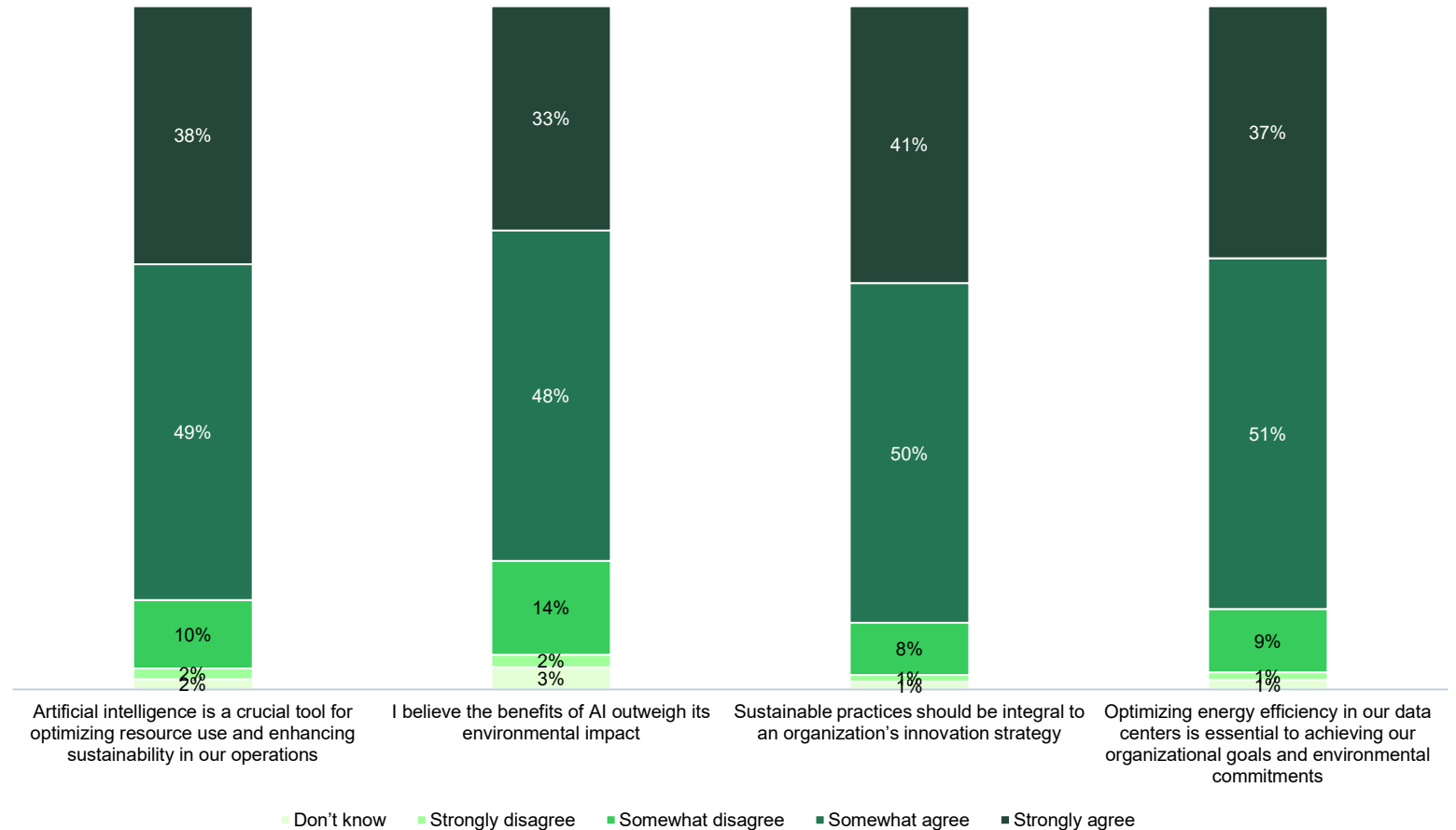
90%

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

88%

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

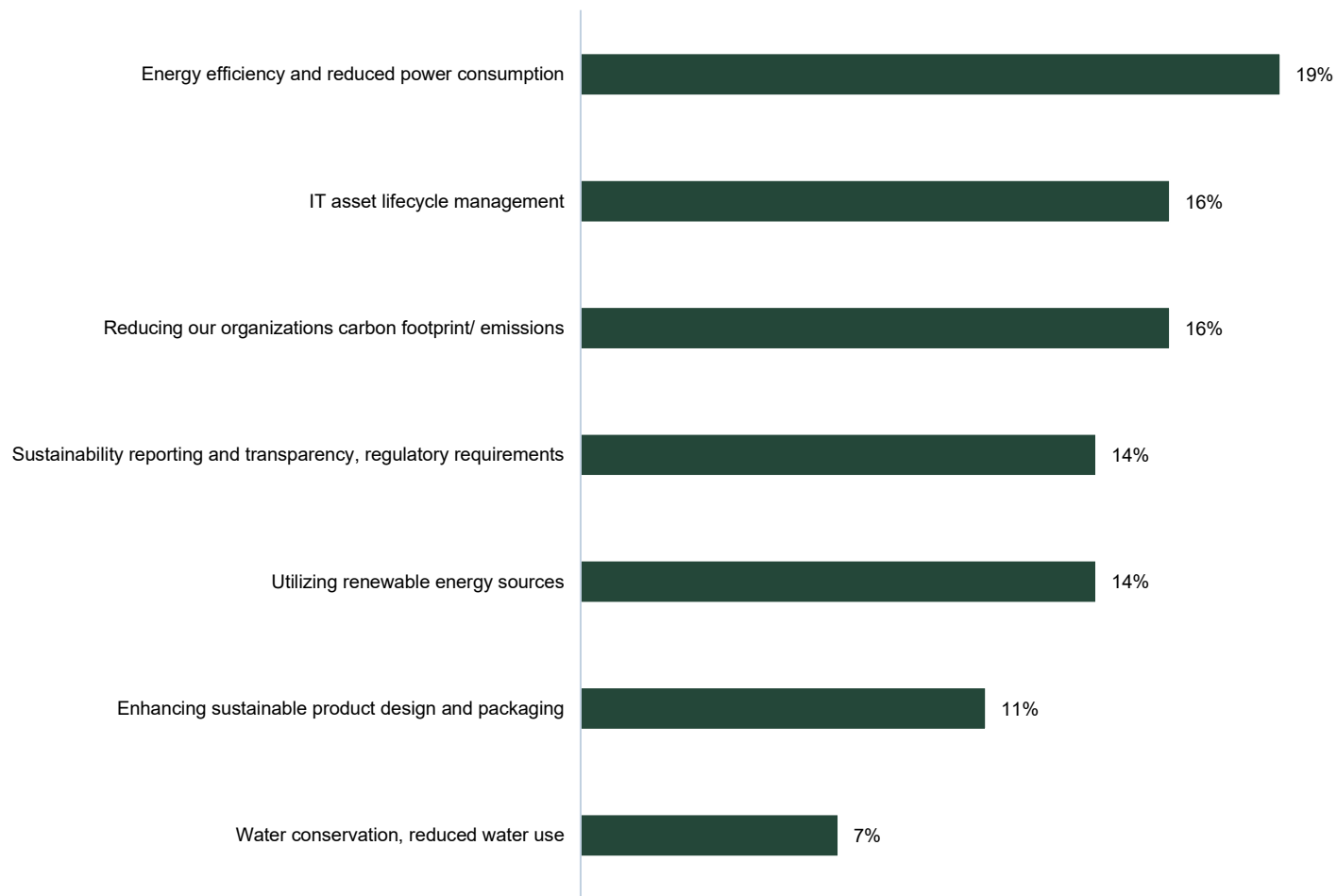
To what extent do you agree or disagree with the following (Q20)



2,850 respondents

Sustainability strategies

Top priority for sustainability strategy (Q19rank1)

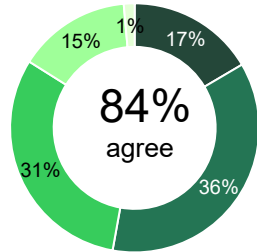


of organizations have a sustainability strategy (Q19combi)

2,850 respondents

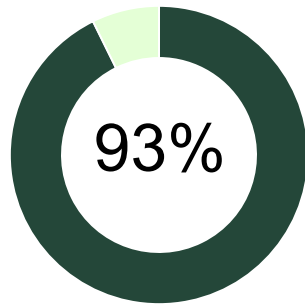
Impact of AI on sustainability

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

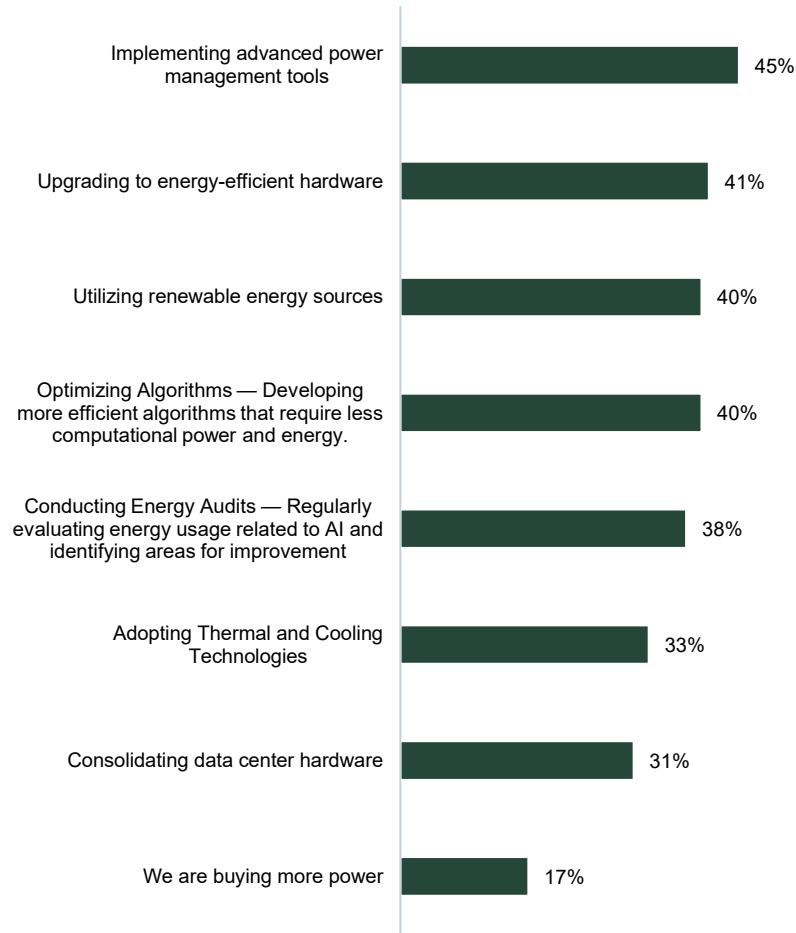


■ Very concerned ■ Somewhat concerned ■ A little concerned
■ Not at all concerned ■ Don't know

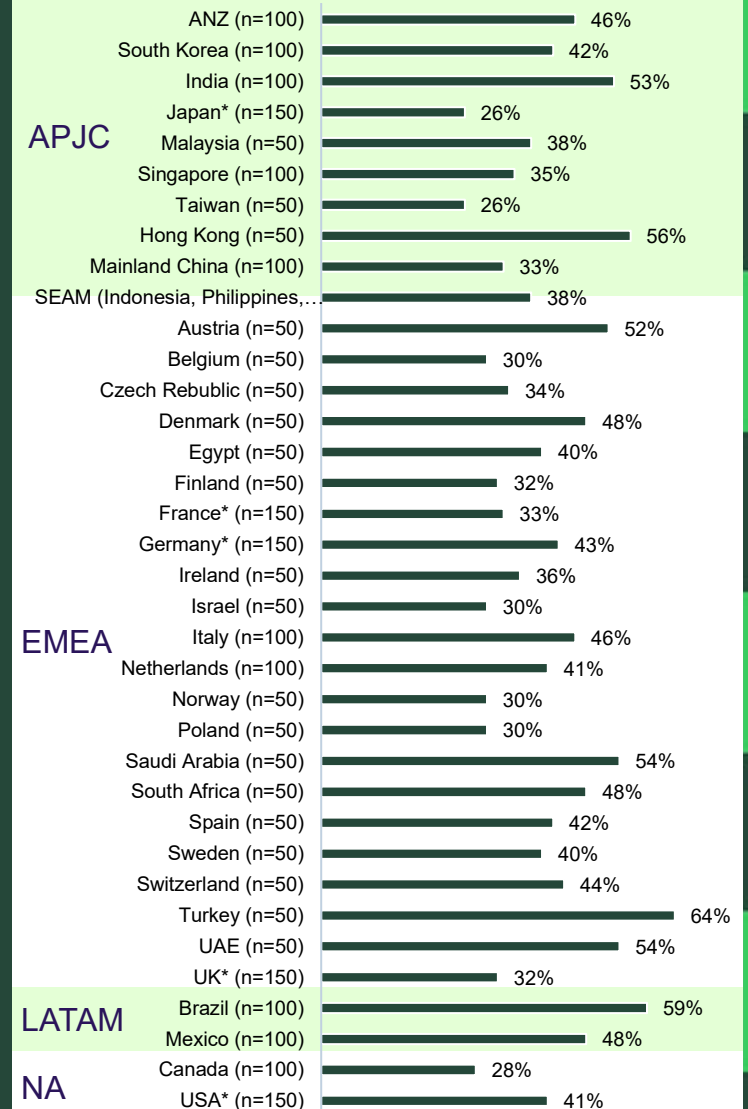
of organizations are taking steps to addressing the increasing energy demands of AI (Q22)



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



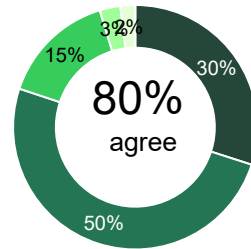
Utilizing renewable energy sources, by country (Q22)



2,850 respondents

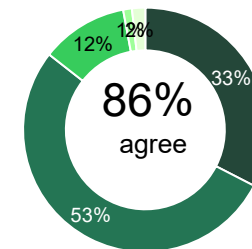
Tech buying criteria & 3rd party help

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



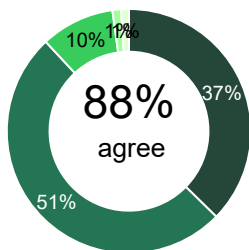
■ Strongly agree ■ Somewhat agree ■ Somewhat disagree
■ Strongly disagree ■ Don't know

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



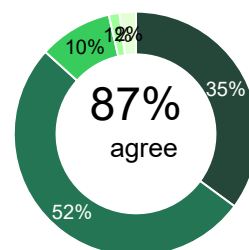
■ Strongly agree ■ Somewhat agree ■ Somewhat disagree
■ Strongly disagree ■ Don't know

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



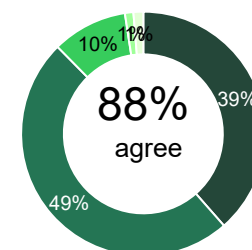
■ Strongly agree ■ Somewhat agree ■ Somewhat disagree
■ Strongly disagree ■ Don't know

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

