

# Dell Technologies 2025 Survey

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

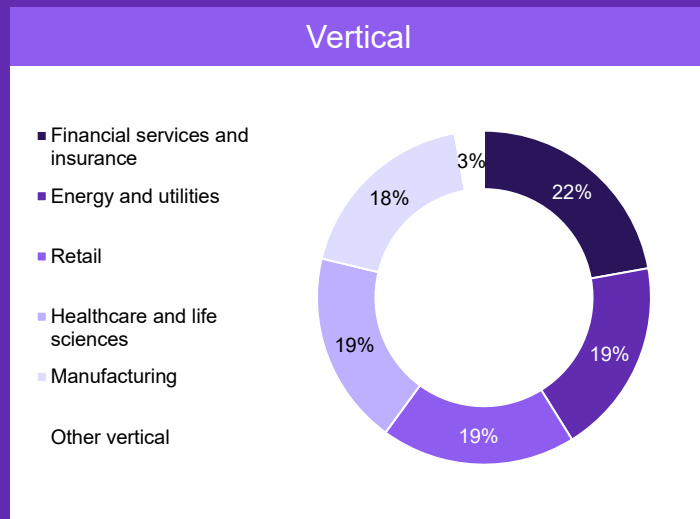
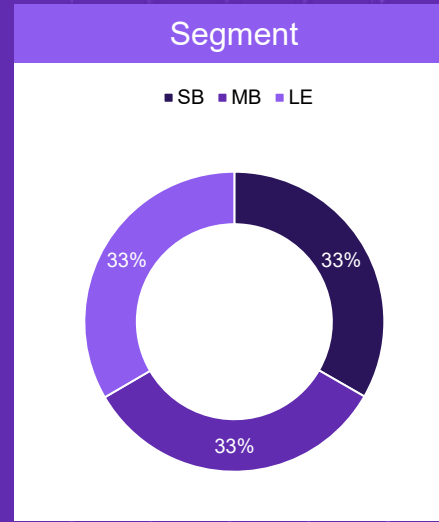
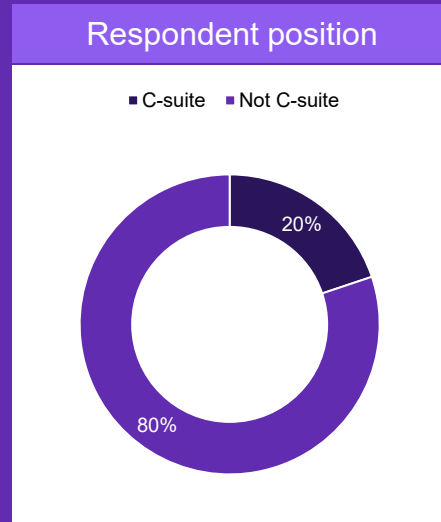
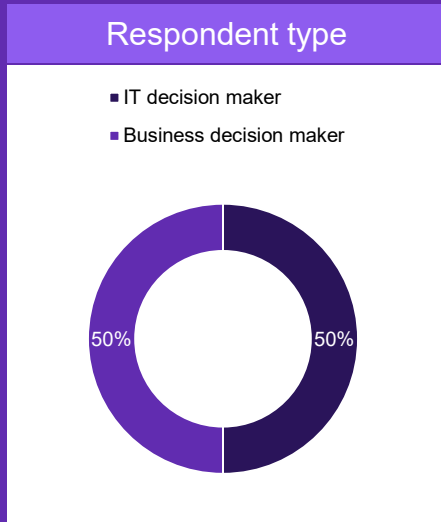
 Dell Technologies



VansonBourne

2,850 respondents

# Profiling and firmographics

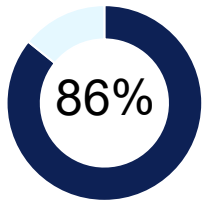




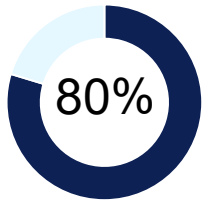
# Business strategies and innovation

# Business strategy influences

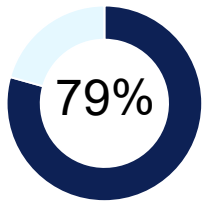
## Key part of business strategy (Q1)



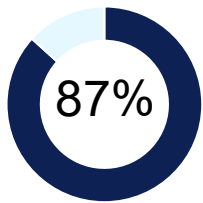
say **innovation** is a key part of their organization's business strategy



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

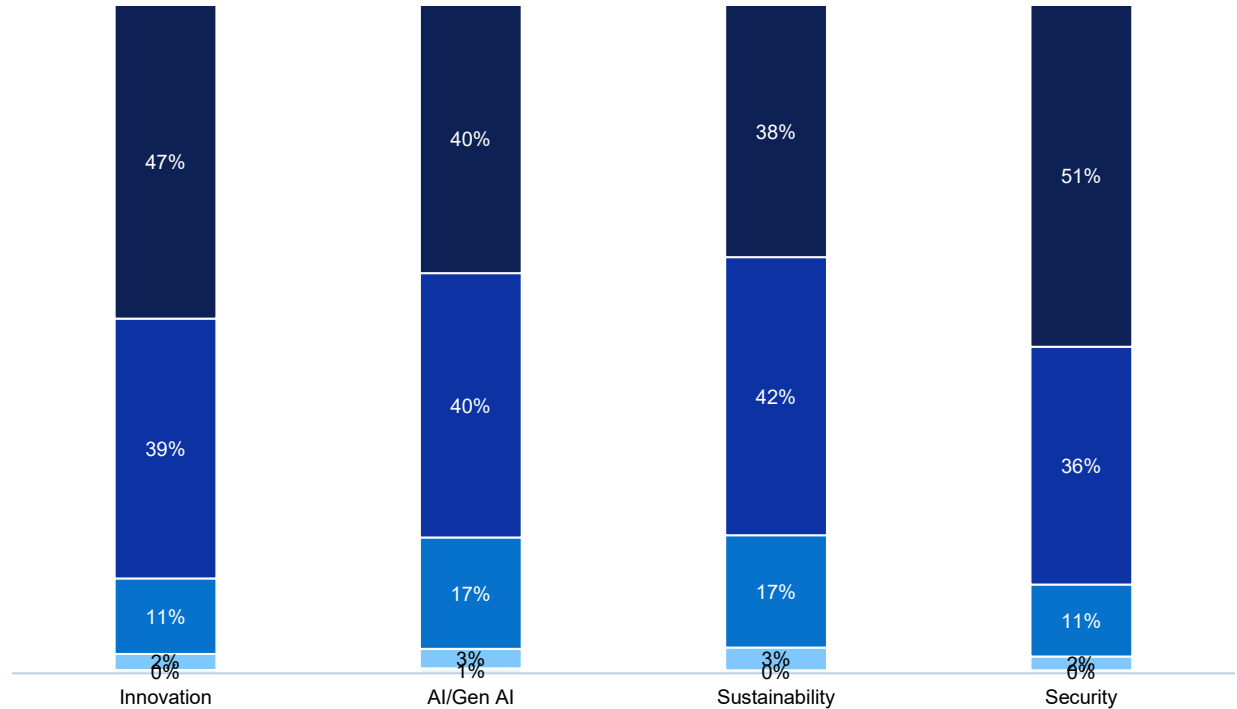


say **sustainability** is a key part of their organization's business strategy



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

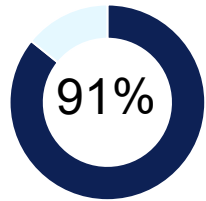
## Role the following play in respondents' organizations business strategies (Q1)



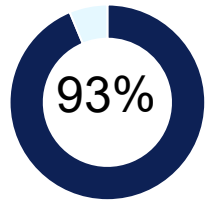
- It is a key part of our business strategy and is unlocking benefits across our organization already
- It is a key part of our business strategy and will unlock benefits across our organization in the future
- We recognize it is important to have within business strategy, but we don't currently have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

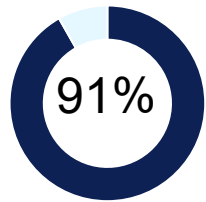
## Experience challenges (Q2)



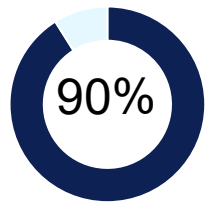
experience challenges when integrating **innovation** into their business strategies



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

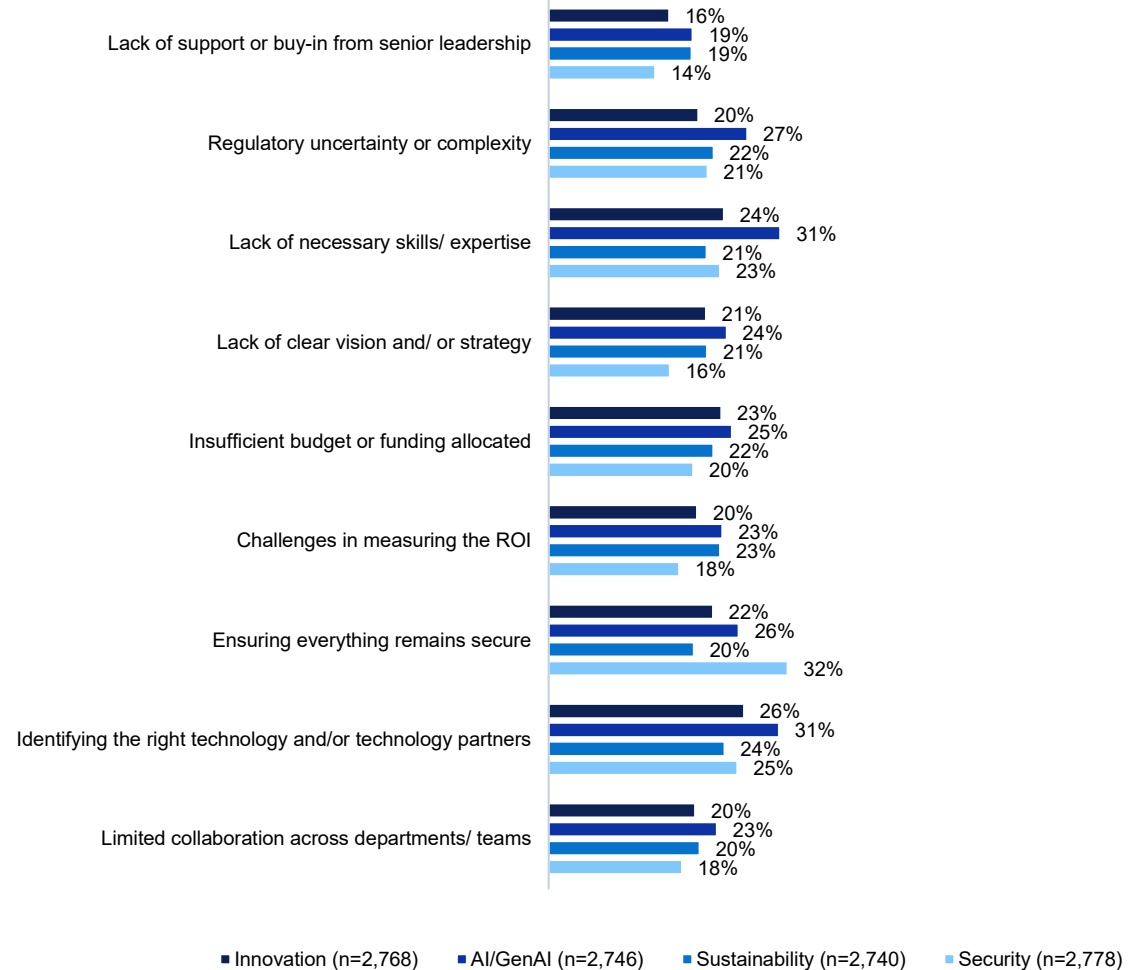


experience challenges when integrating **sustainability** into their business strategies



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 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

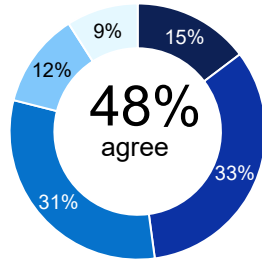
## Security - top 3 challenges (Q2)

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

2,778 respondents

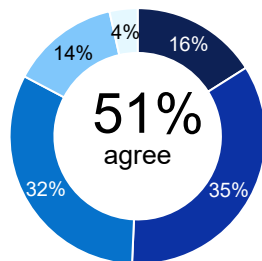
# Keeping pace with the industry

## 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)

### Verbatim answers summarized in themes:

- 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

### Example verbatim answers:

*"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."*

1,364 respondents

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

### Verbatim answers summarized in themes:

- 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

### Example verbatim answers:

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

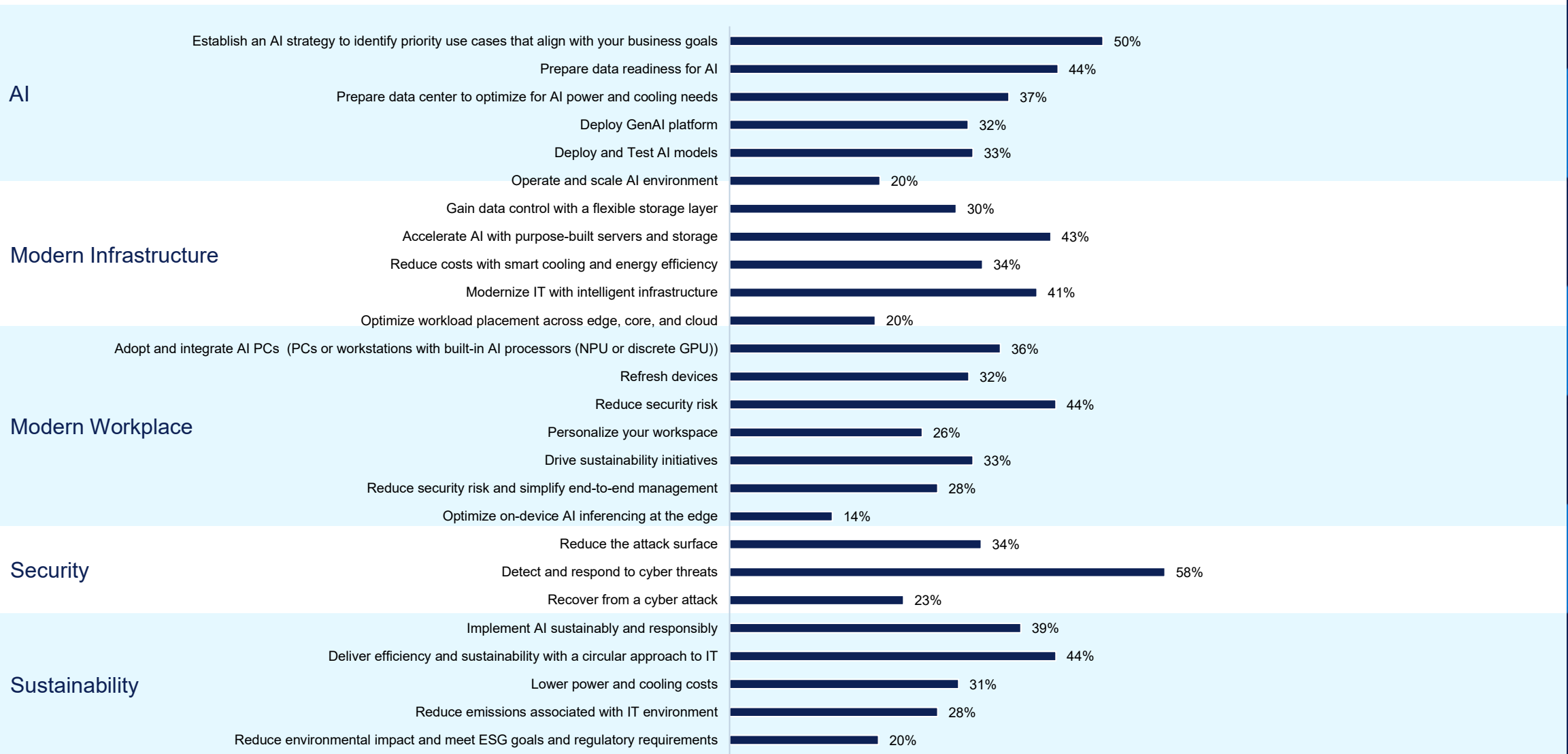
*"We constantly upgrade our security to meet the highest standards."*

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

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

1,228 respondents

### Customer IT Initiatives planned for 2025 (M2^)



Source: Vanson Bourne, Dell Technologies survey across 2,850 business and IT decision makers globally, all segments, Jun 2025 (\*countries published Feb 2025).

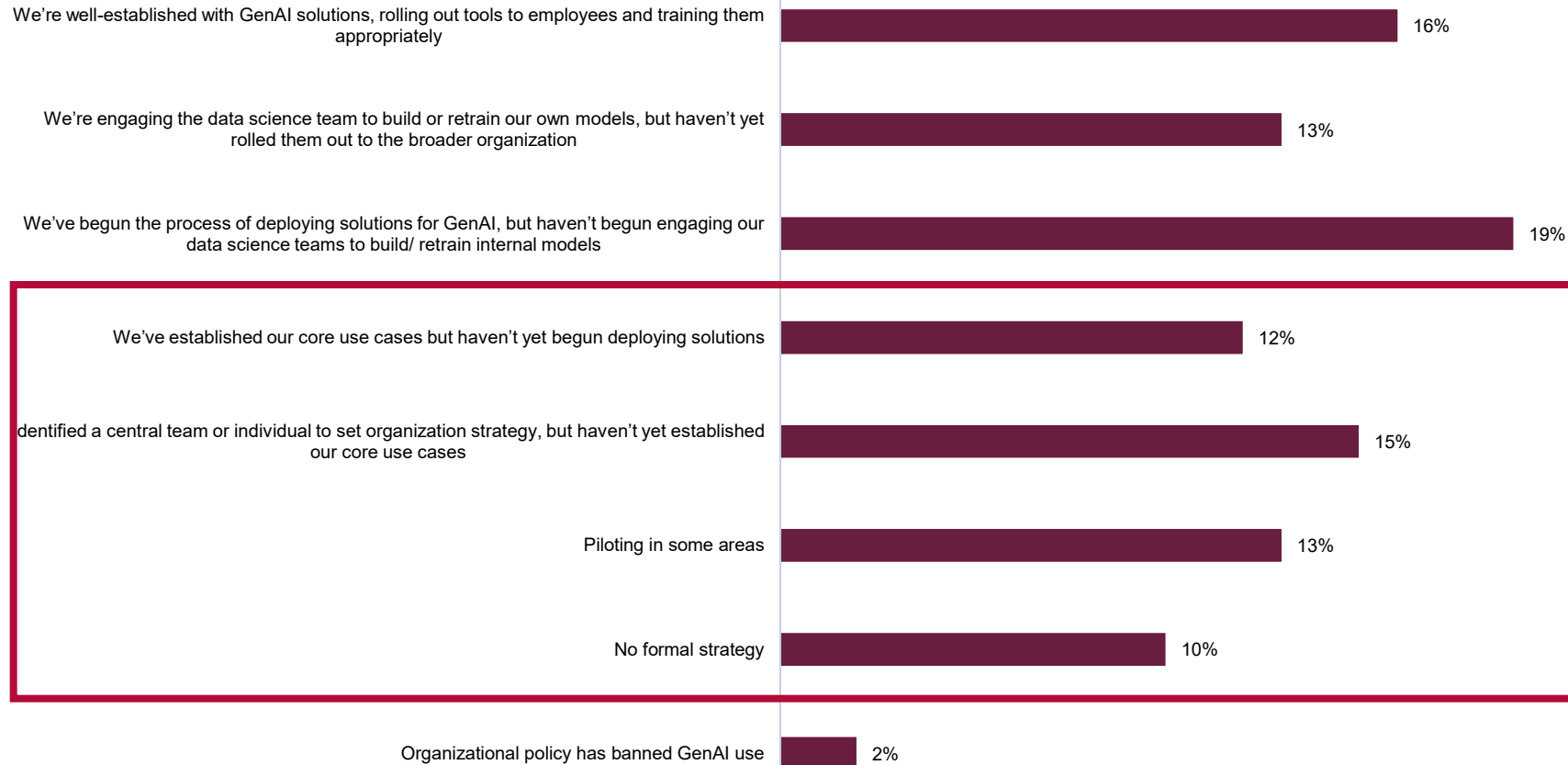
^Note, this question was asked of a different respondent set in the US, UK, France, Germany and Japan compared to the remainder of the survey. The data for these countries comes from the messaging survey for these countries.

# The role of artificial intelligence

2,850 respondents

# AI/GenAI journey

## Organization's GenAI journey (Q5)

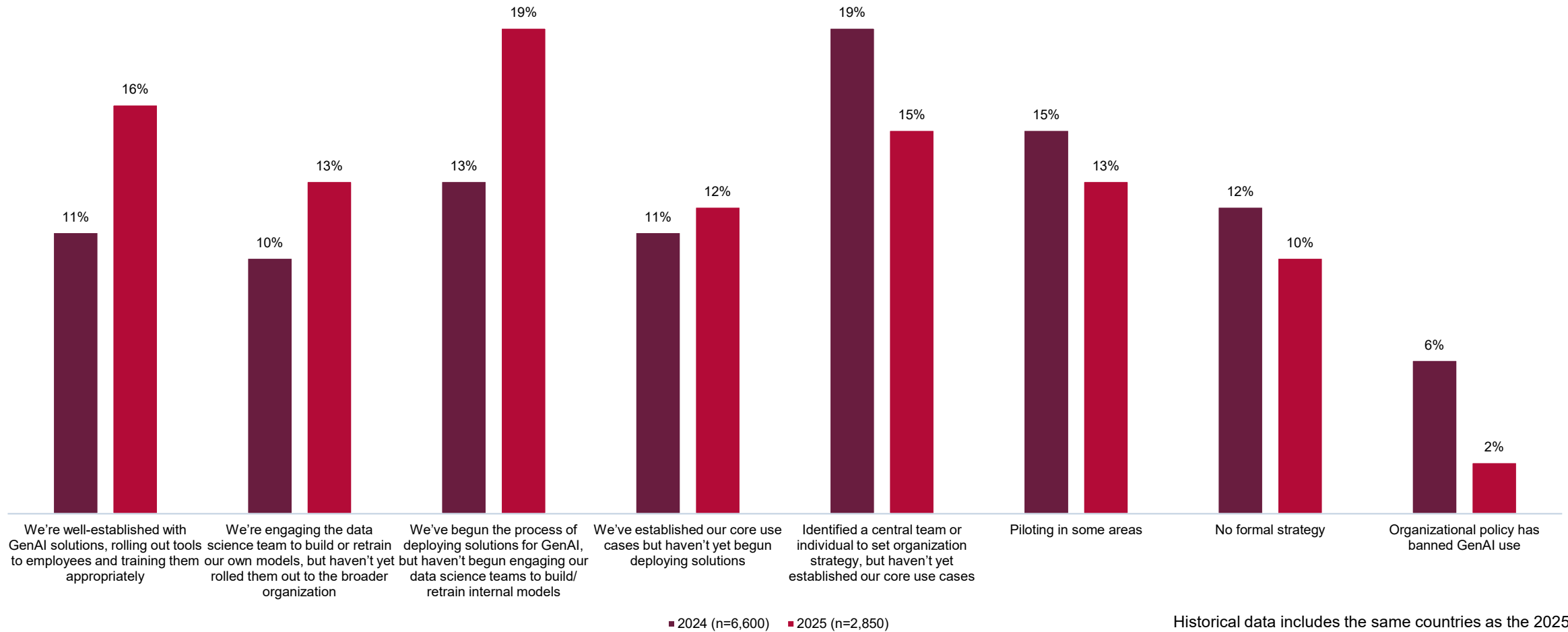


**49%**  
of organizations at early to mid-stage of their journey

2,850 respondents

# AI/GenAI journey

## Organization's GenAI journey Year on Year (Q5)

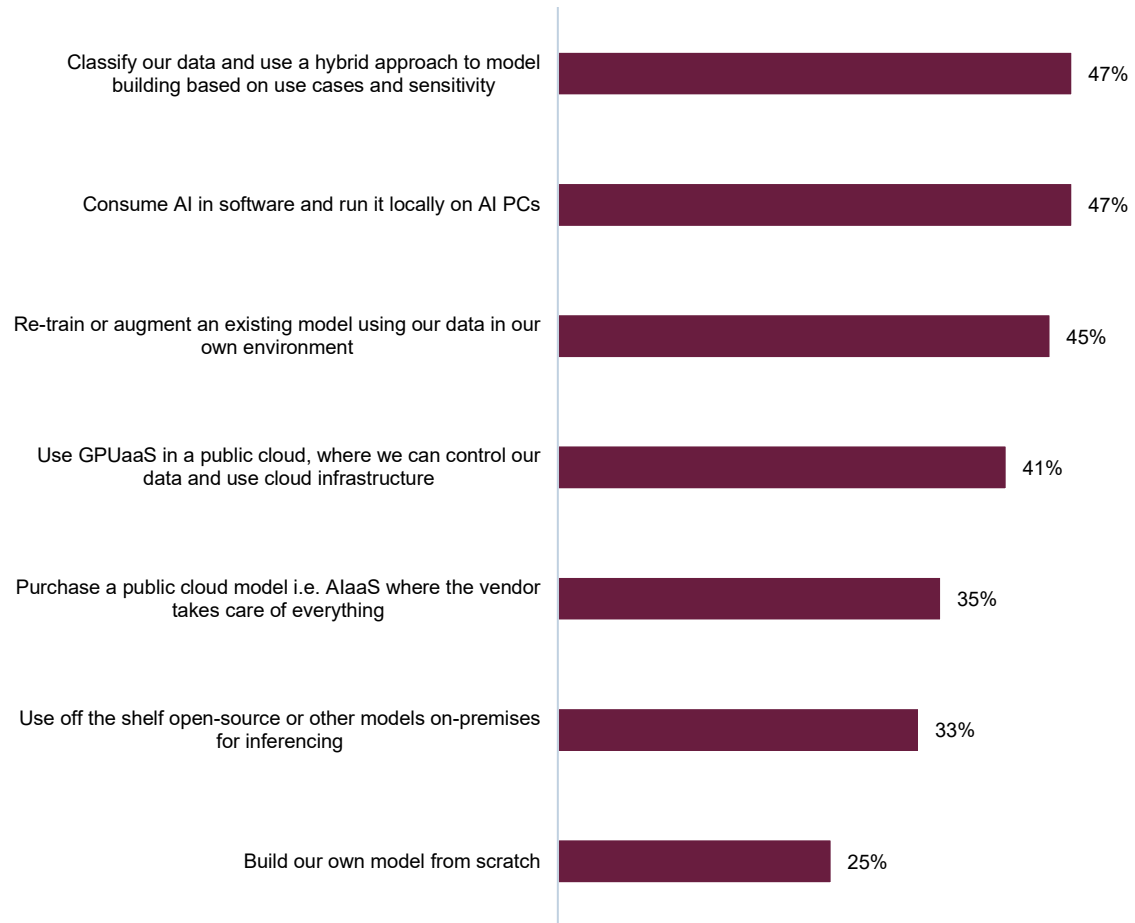


Historical data includes the same countries as the 2025 survey, but does not include SBs, Egypt or Phillipines

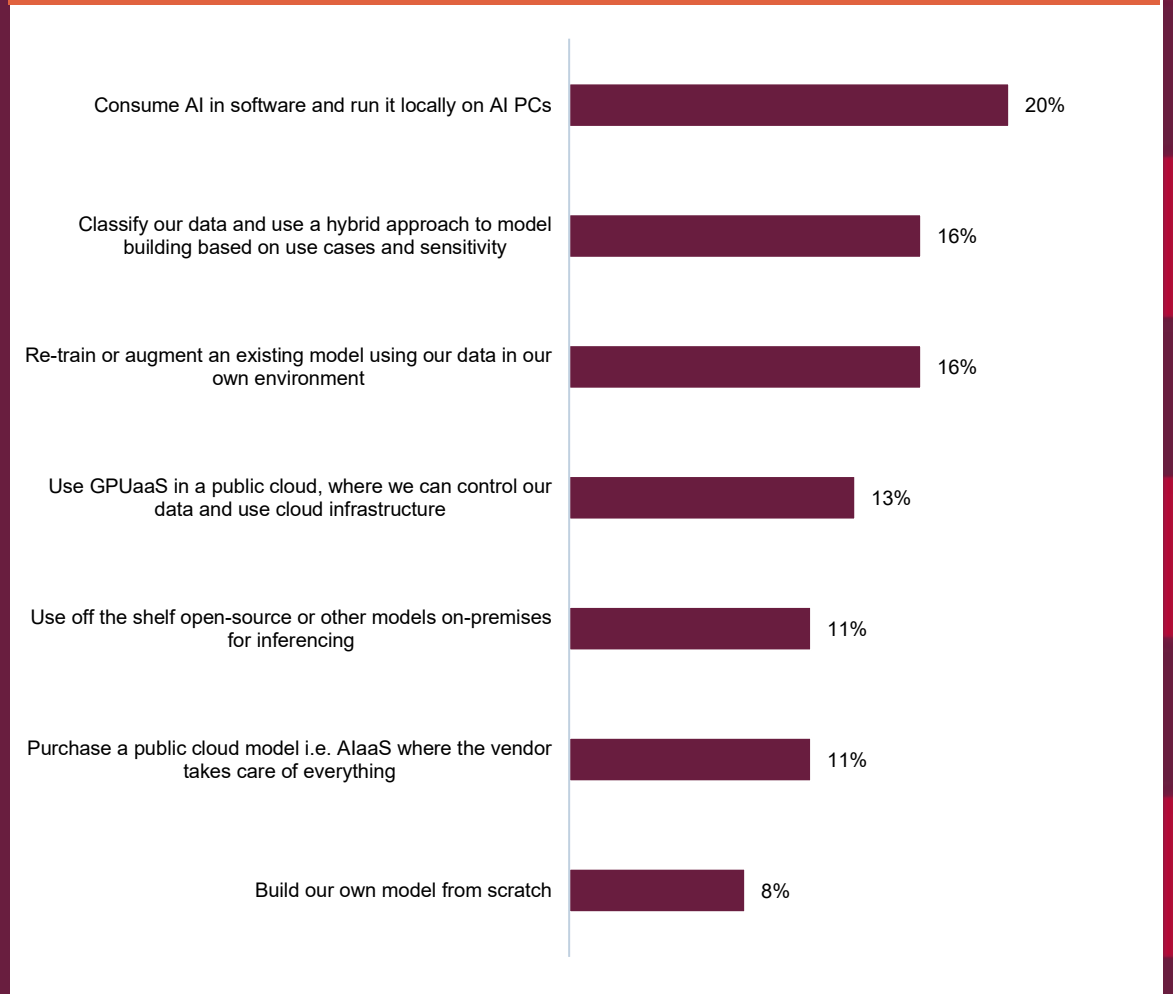
2,850 respondents

# AI/GenAI strategy

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



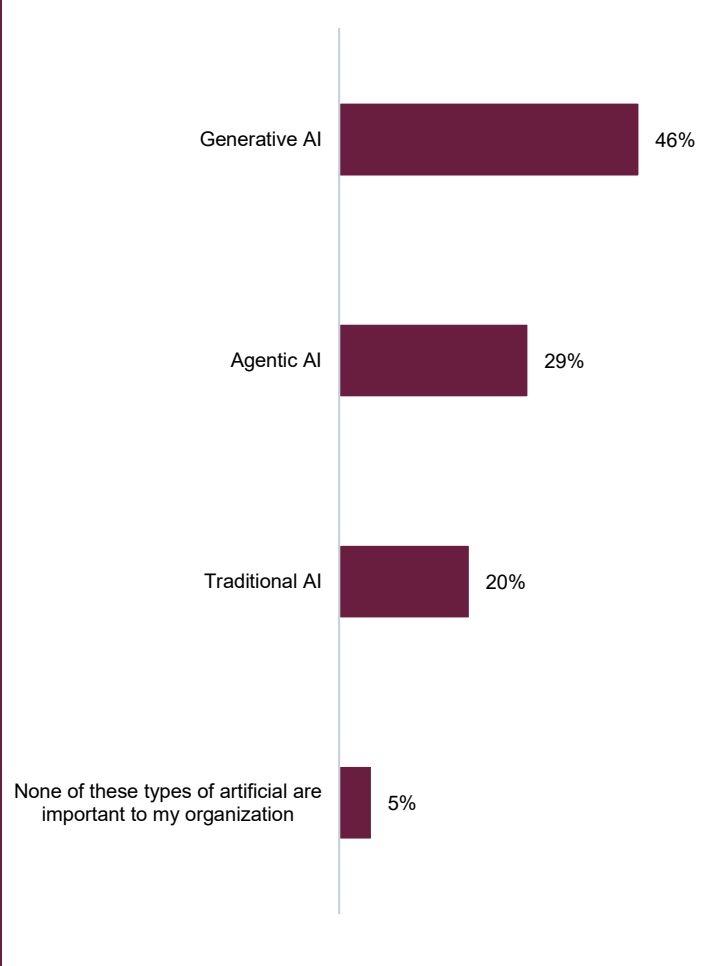
## Most likely type of procurement/usage (Q6rank1)



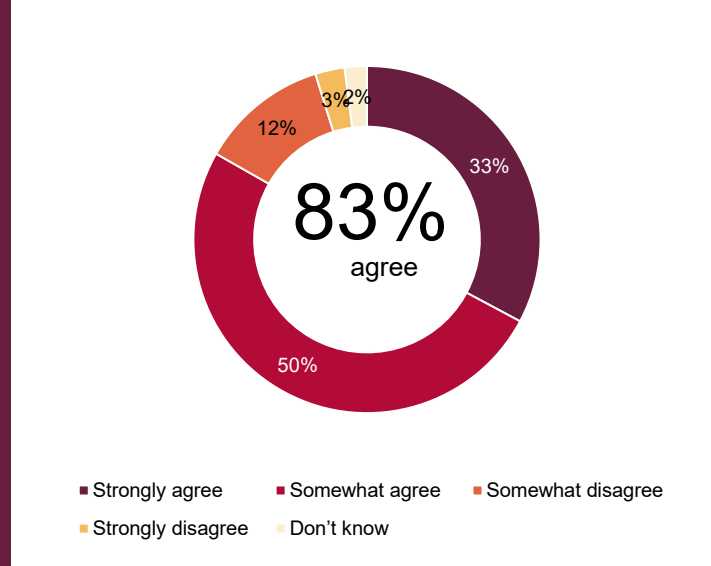
2,850 respondents

# Importance of artificial intelligence

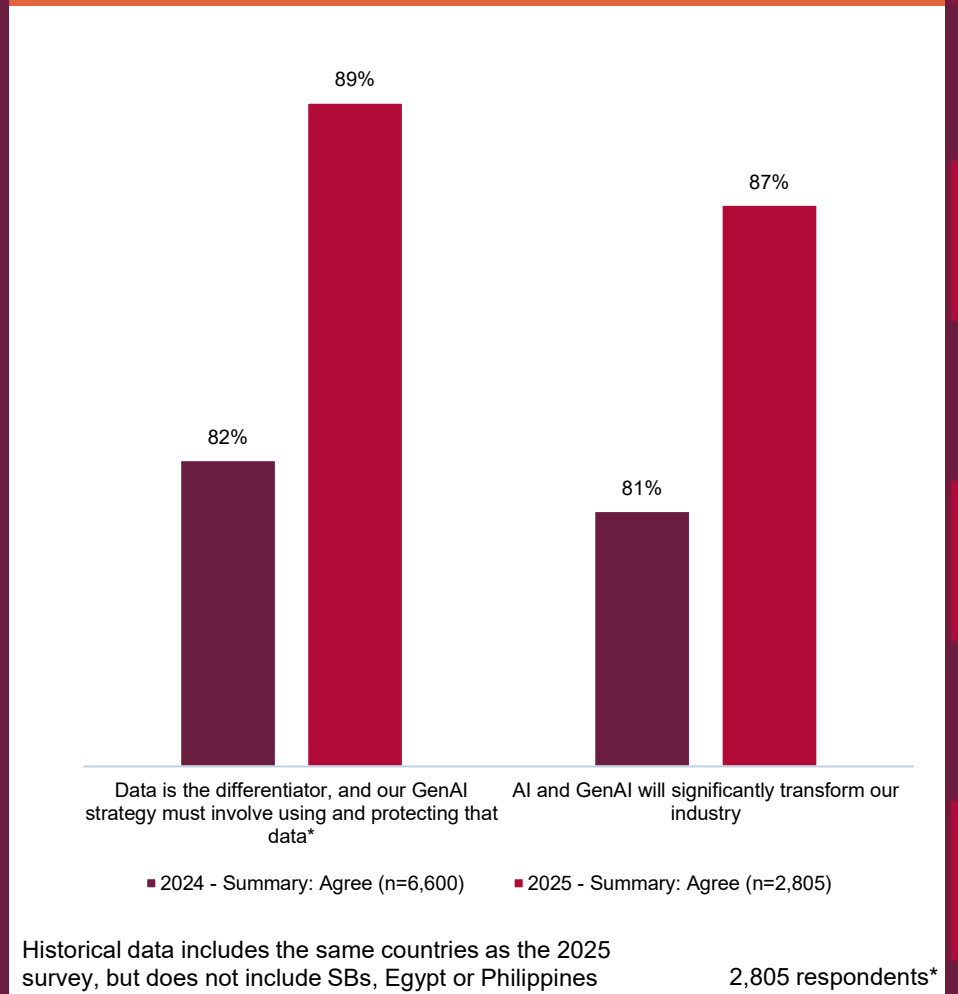
## Most important type of AI for my organization (Q4)



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



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

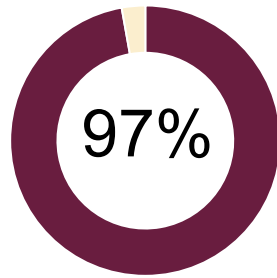


Source: Vanson Bourne, Dell Technologies survey across 2,850 business and IT decision makers globally, all segments, Jun 2025 (\*countries published Feb 2025).

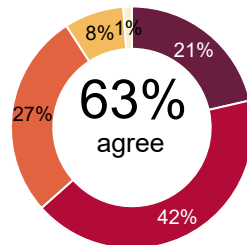
2,850 respondents

# Artificial intelligence skills gap

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

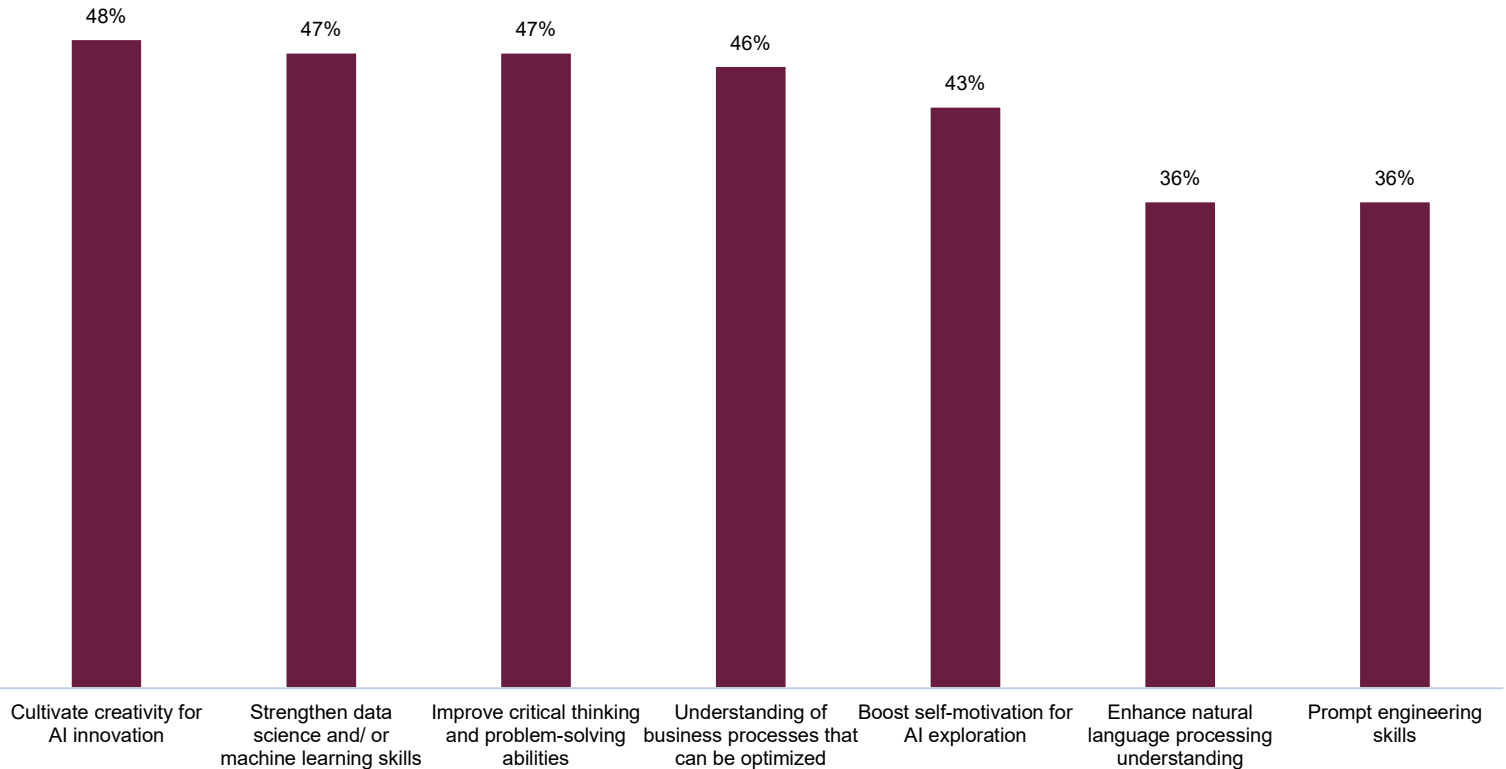


Employees within my organization do not fully understand how to implement GenAI securely (Q7\_7)



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

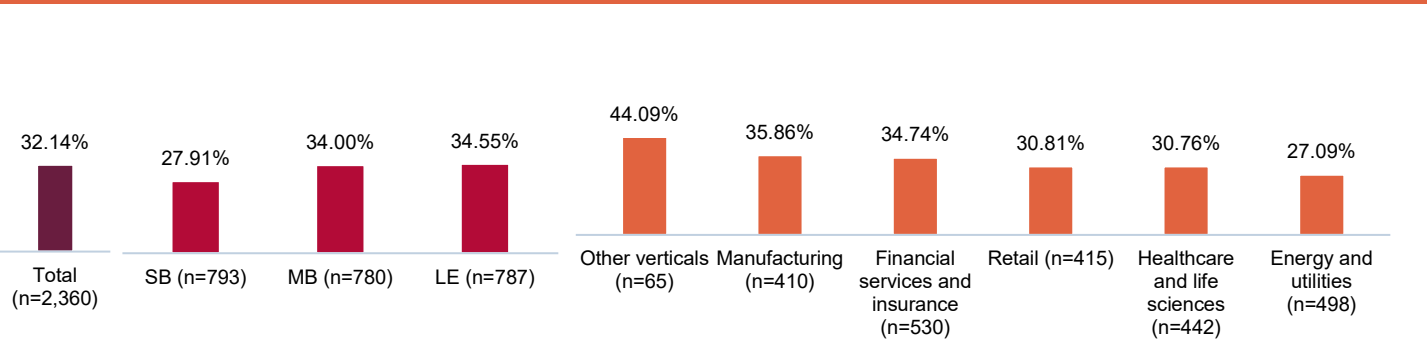
Skills that need to be developed to unlock the potential of AI (Q11)



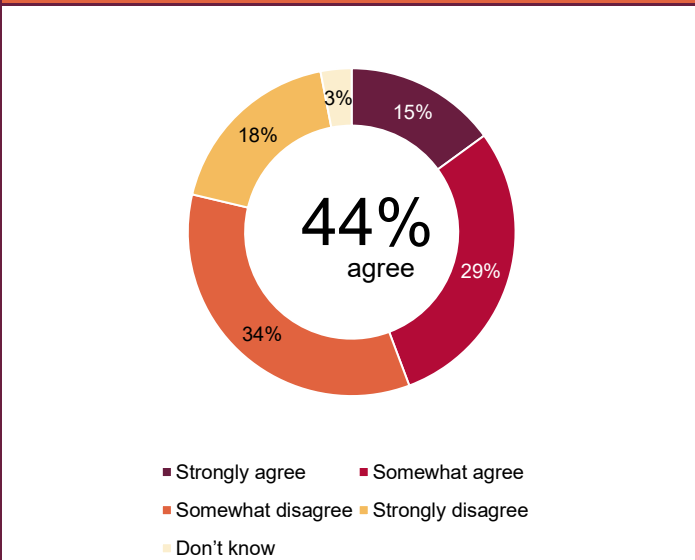
2,850 respondents

# The ROI of artificial intelligence

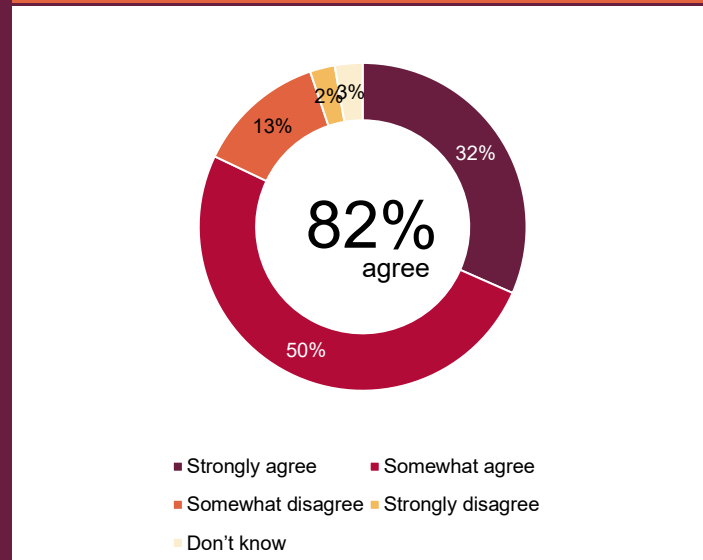
Average expected return of investment from using artificial intelligence, by segment/vertical (Q10)



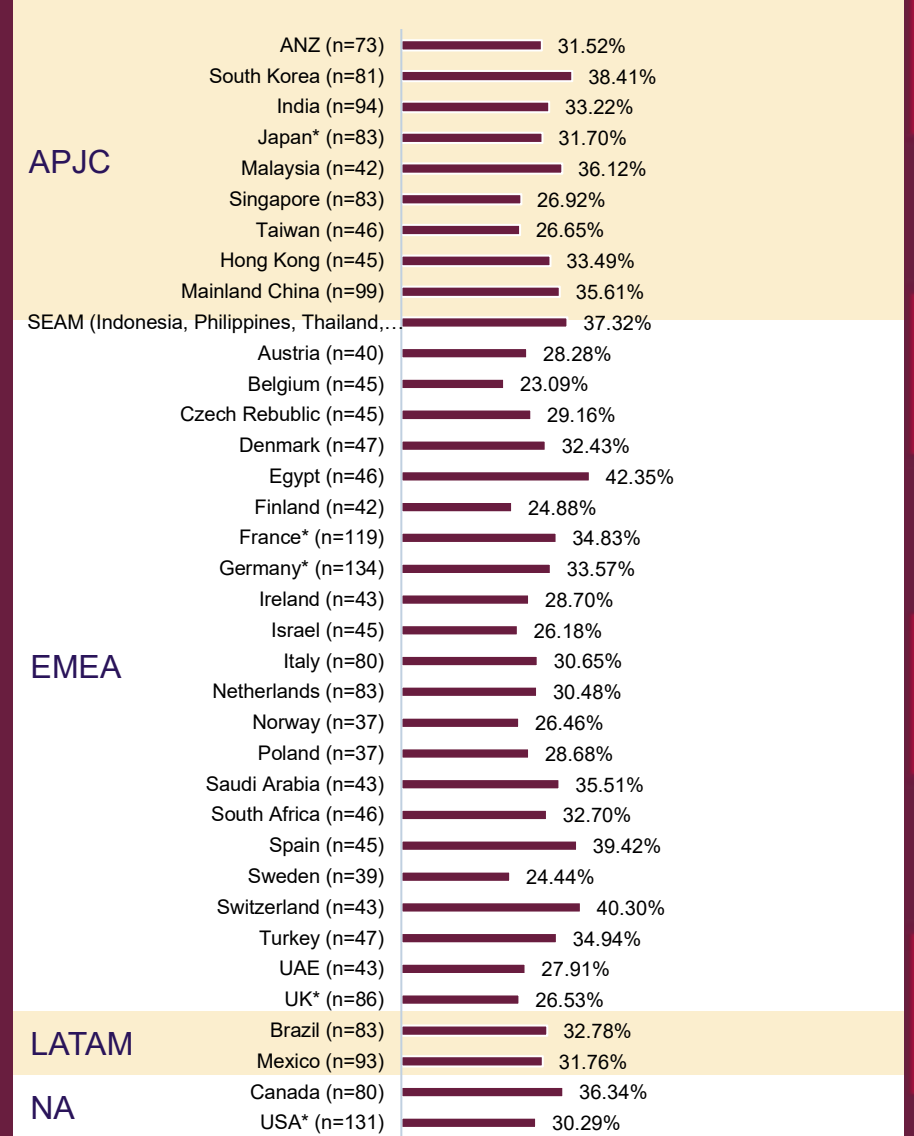
We have become pessimistic with the near-term value of AI (Q3\_9)



We are seeing substantial ROI and/or productivity gains from AI (Q3\_10)



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

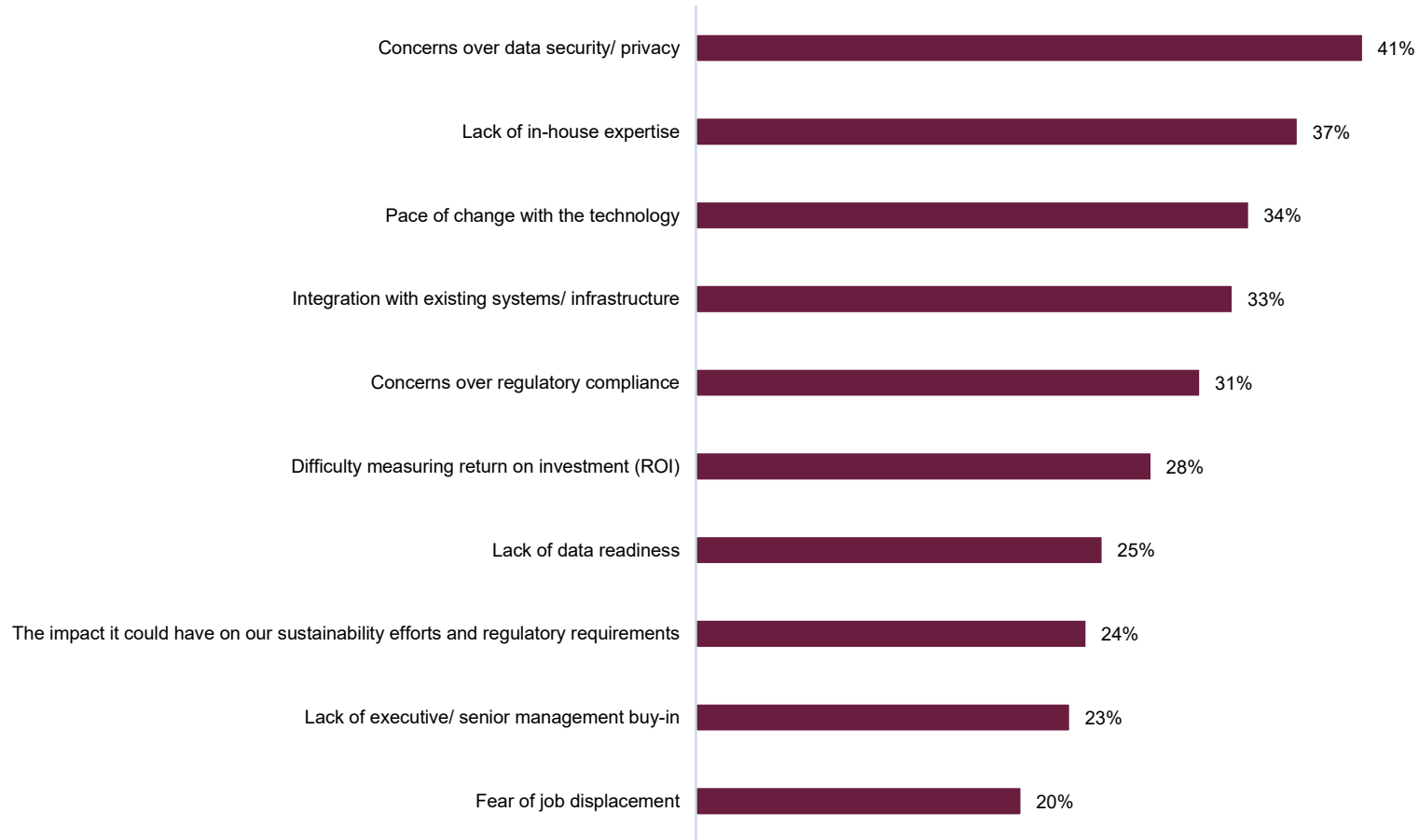


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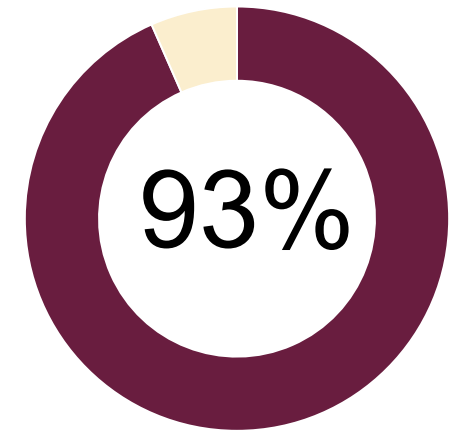
2,850 respondents

# 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)



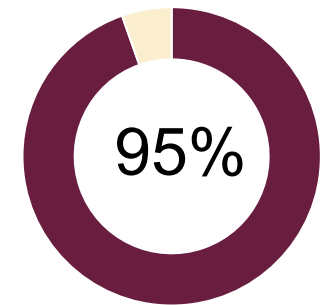
2,850 respondents

# 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)

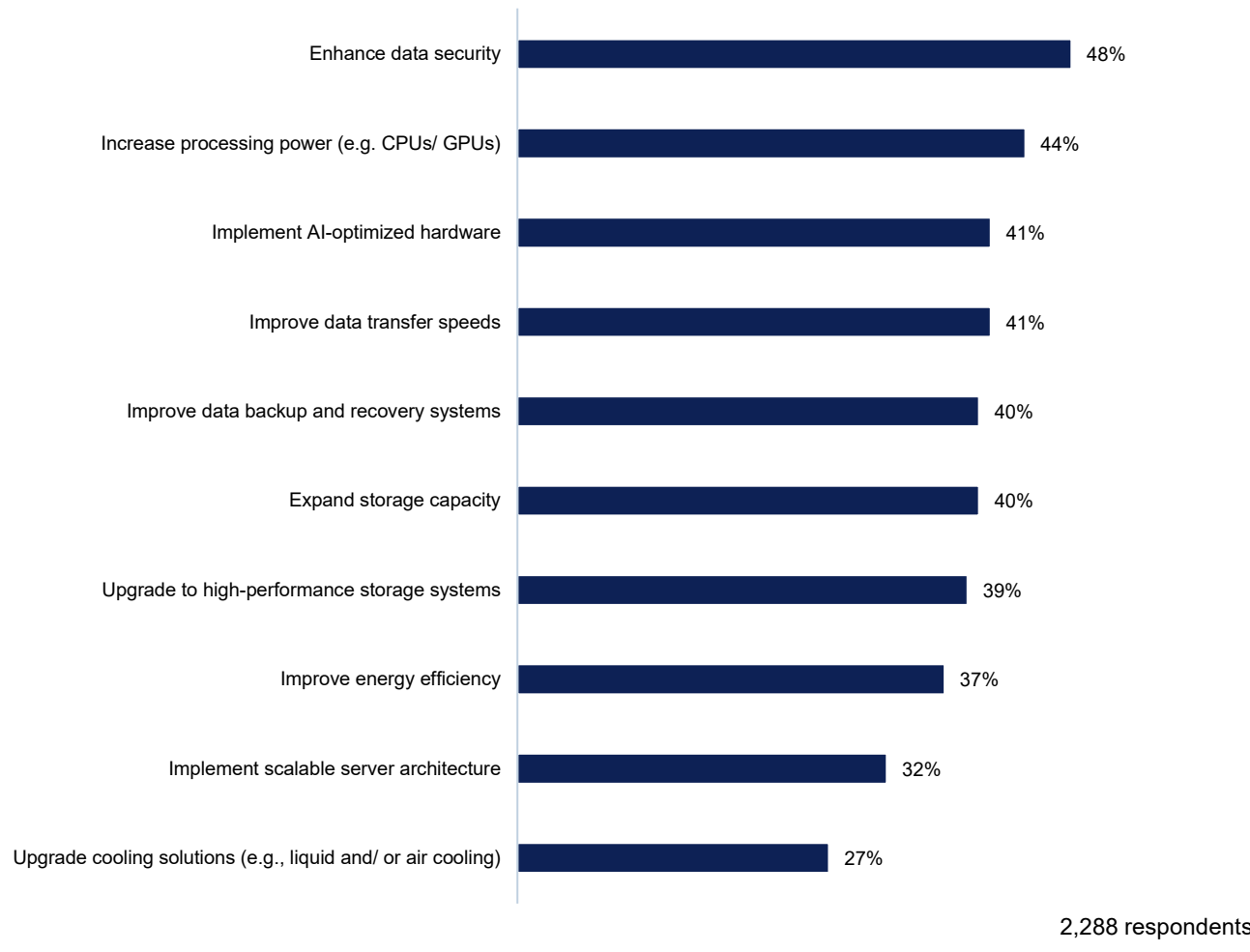


# Modern Infrastructure

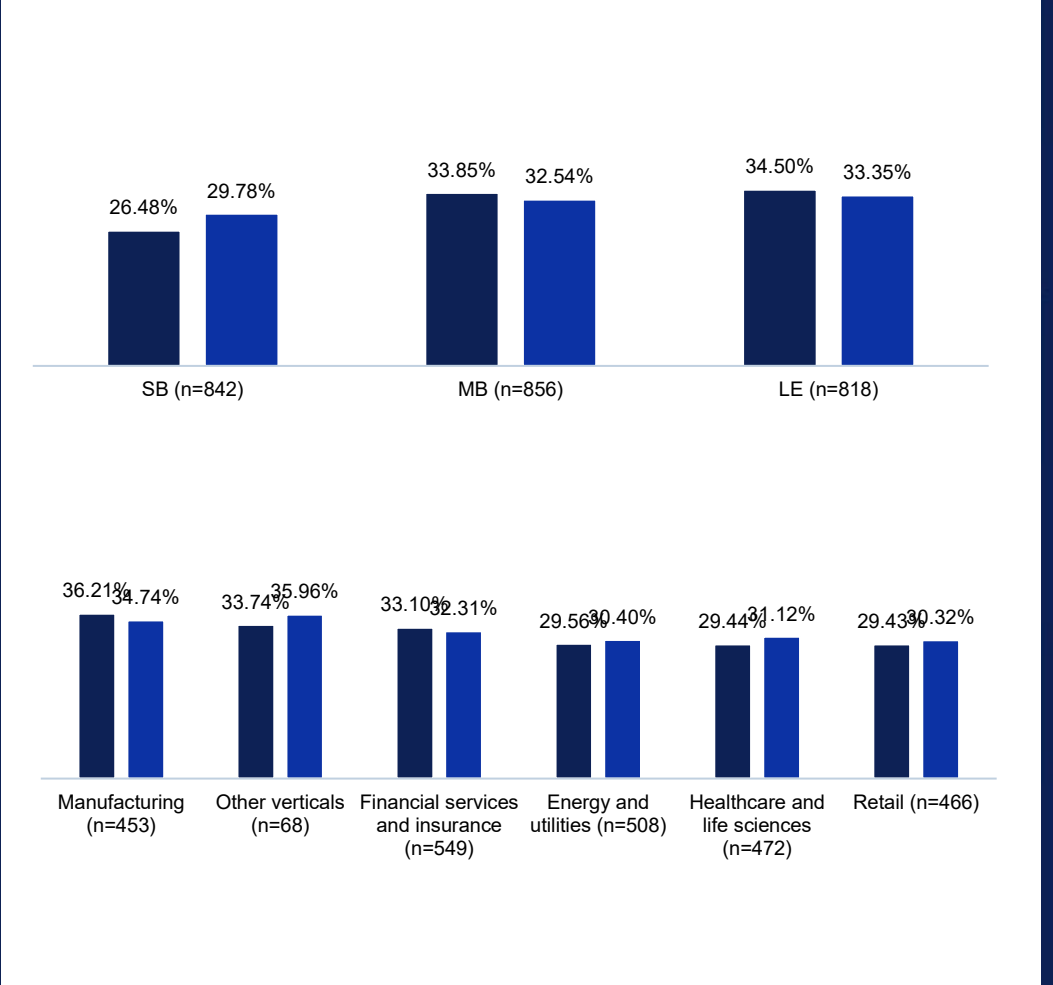
2,850 respondents

# Storage and server upgrades

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



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



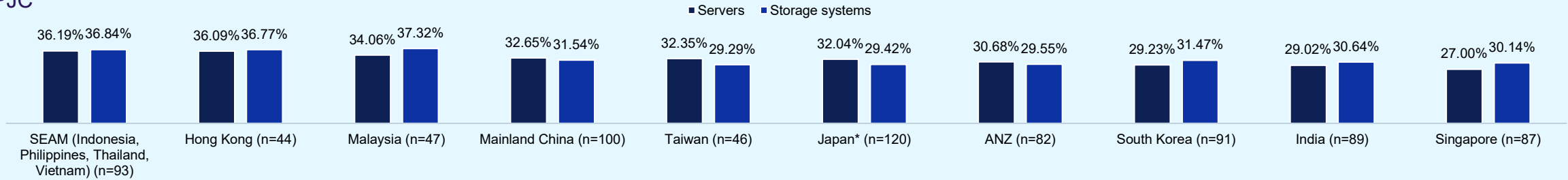
Source: Vanson Bourne, Dell Technologies survey across 2,850 business and IT decision makers globally, all segments, Jun 2025 (\*countries published Feb 2025).

2,850 respondents

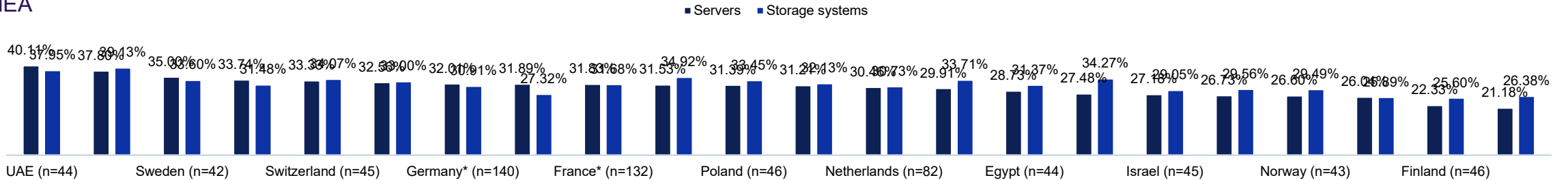
# Storage and server upgrades

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

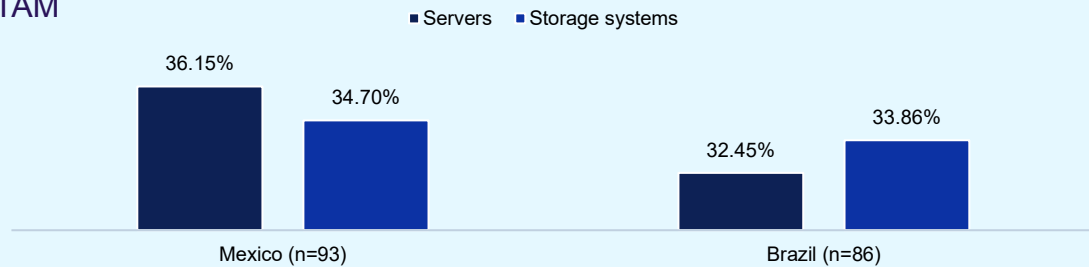
## APJC



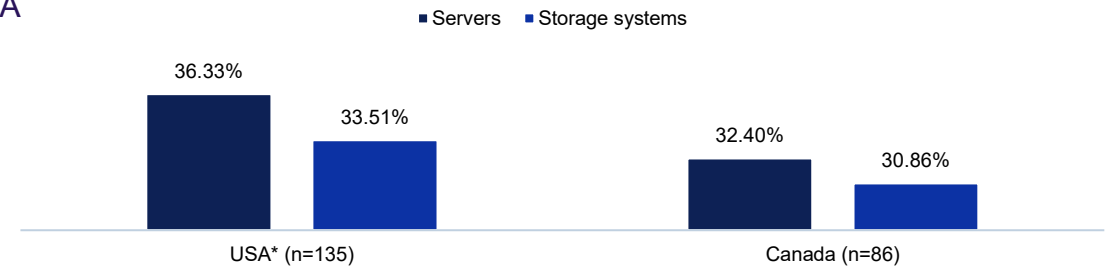
## EMEA



## LATAM



## NA

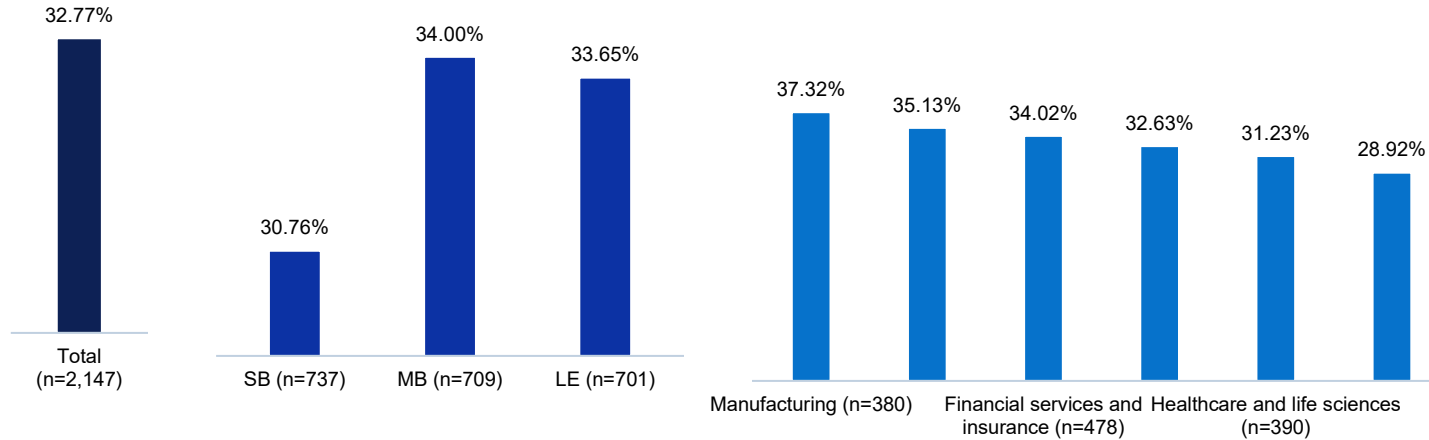


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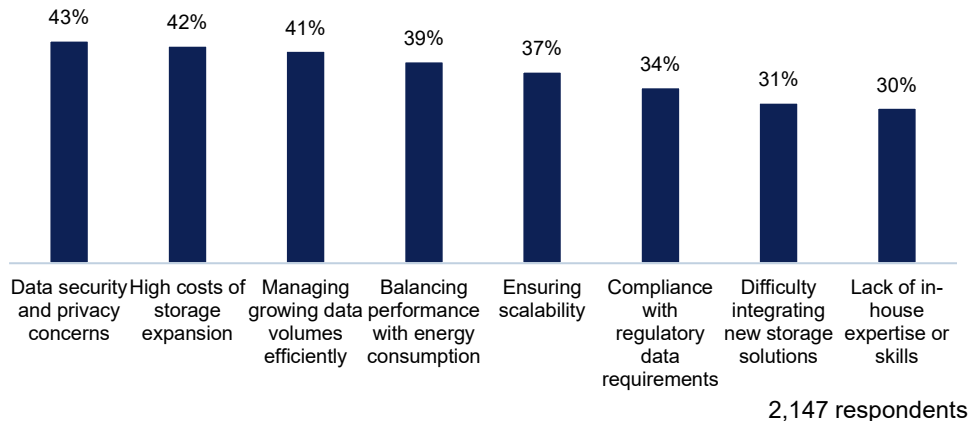
2,850 respondents

# Increasing storage capacity

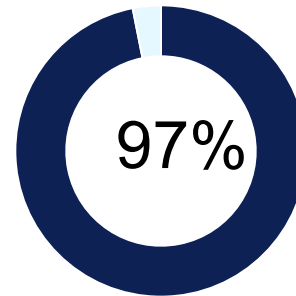
Average percentage increase to storage capacity as a result of data growth driven by AI, by segment/vertical (Q15)



Expected challenges when increasing storage capacity (Q16)

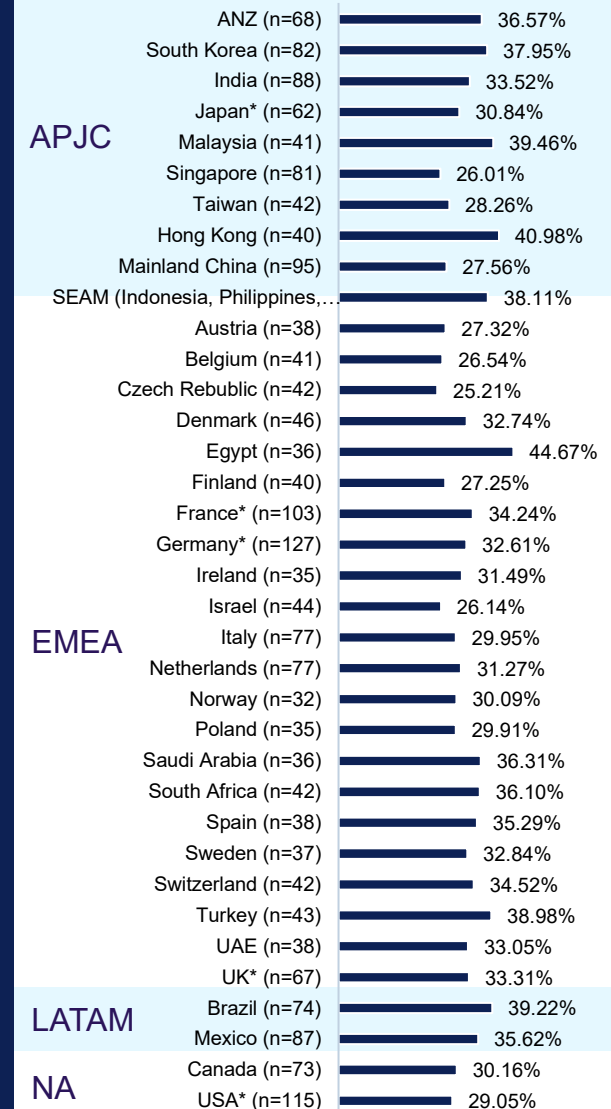


of organizations planning to increase their storage capacity expect to face challenges when doing so (Q16)



2,147 respondents

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



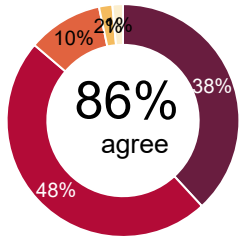
Source: Vanson Bourne, Dell Technologies survey across 2,850 business and IT decision makers globally, all segments, Jun 2025 (\*countries published Feb 2025).

# Modern Workplace

2,850 respondents

# AI/GenAI and intuitive, personalized applications

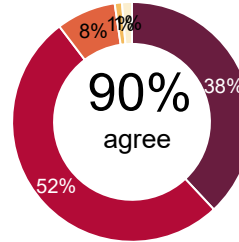
My organization plans to leverage GenAI to increase productivity, which will enhance the employee experience over the next 12 months (Q7\_2)



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

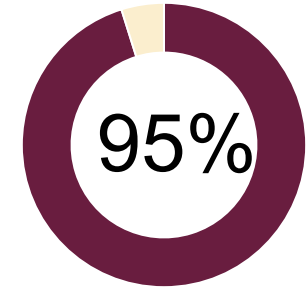
2,805 respondents

GenAI tools have the potential to enable the deployment of more intuitive and personalized applications (Q7\_3)

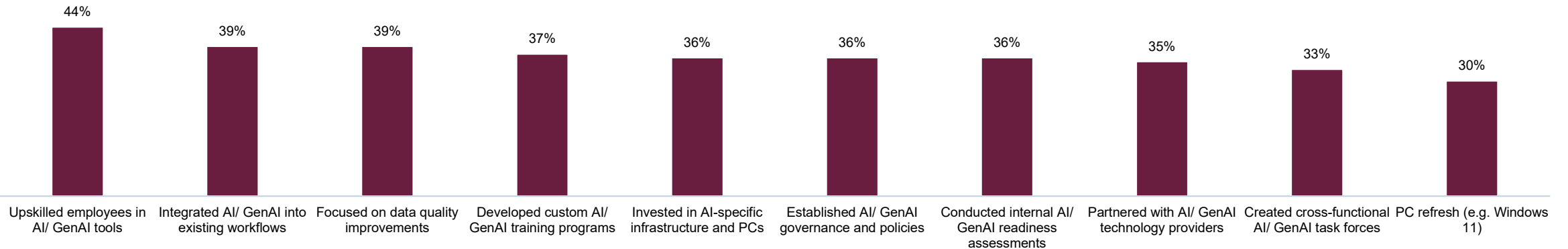


■ Strongly agree ■ Somewhat agree ■ Somewhat disagree  
■ Strongly disagree ■ Don't know

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

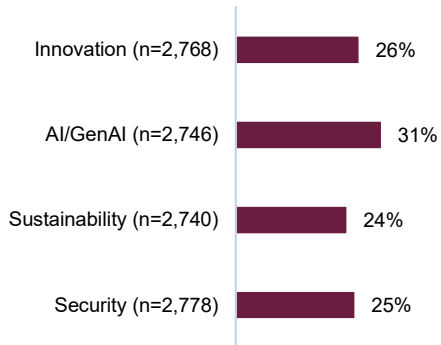


Steps taken towards using AI/GenAI for the deployment of more intuitive and personalized applications (Q8)

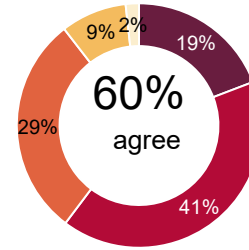


# Modern workplace management

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

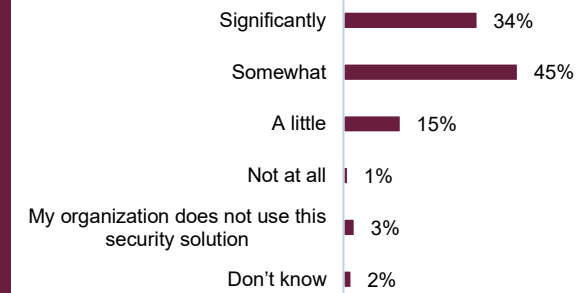


I'm concerned about my organization's ability to effectively manage our devices and protect our data (Q3\_11)

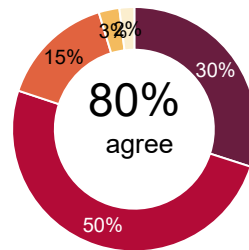


■ Strongly agree ■ Somewhat agree ■ Somewhat disagree  
■ Strongly disagree ■ Don't know

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

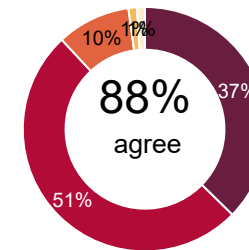


We need the help of a third-party partner to achieve our sustainability goals (Q20\_1)



■ 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

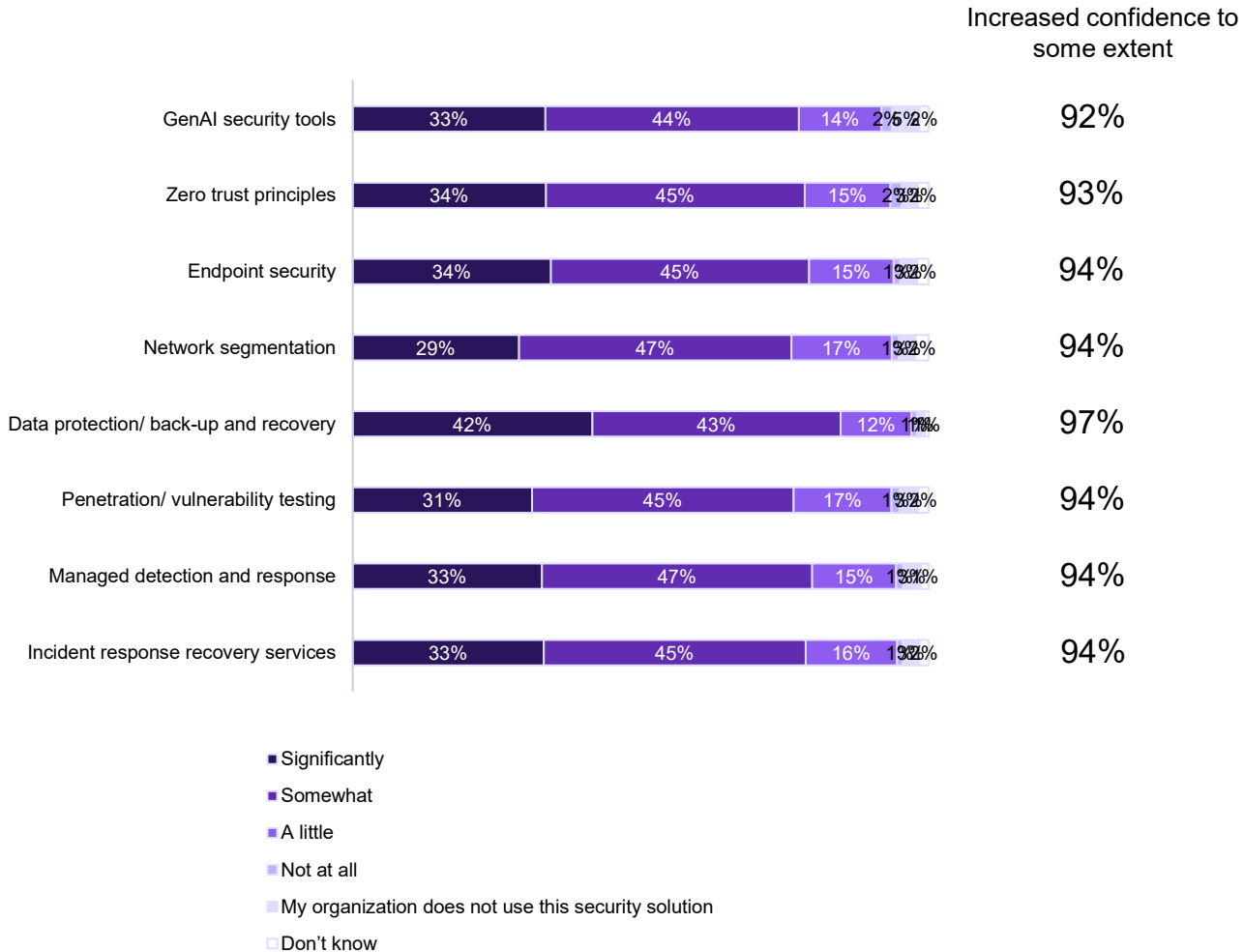


# Security

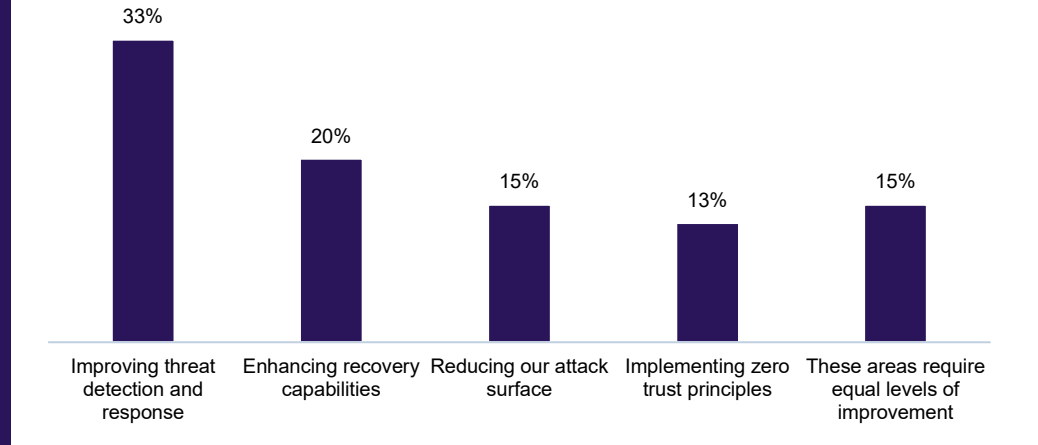
2,850 respondents

# Importance of security

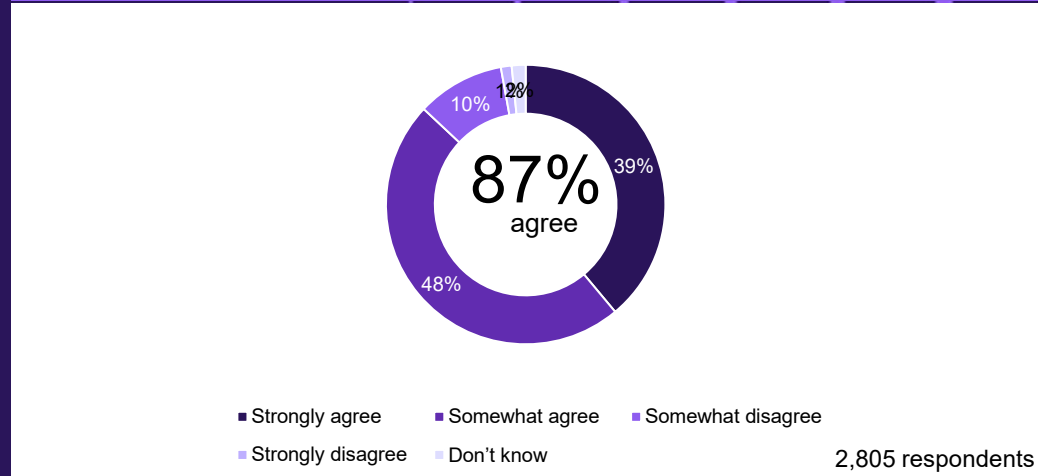
## Security solutions most likely to have increased confidence levels in security posture (Q18)



## Areas that require the most improvement (Q17)

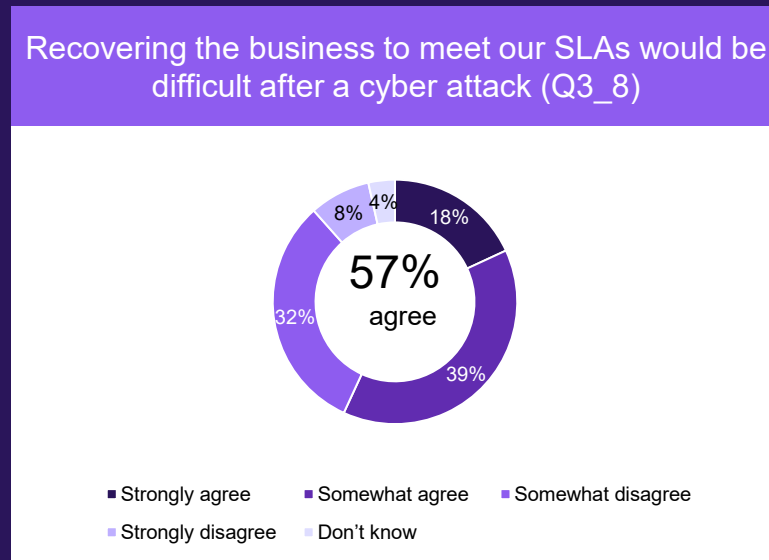
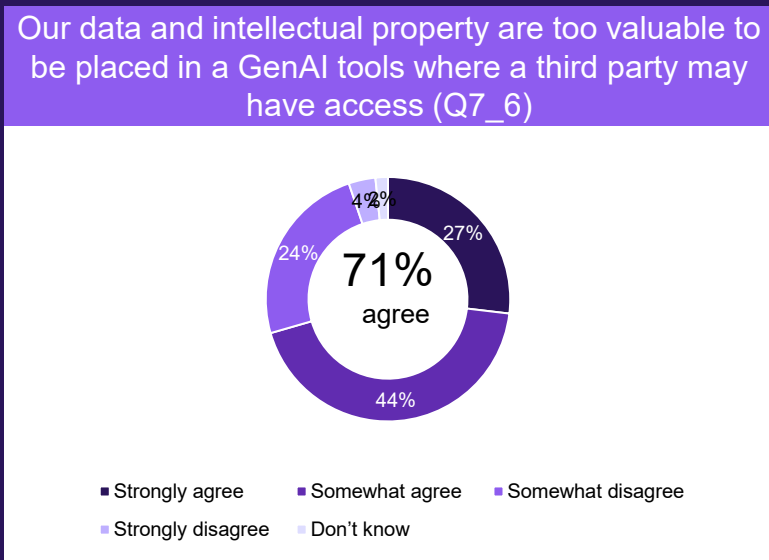
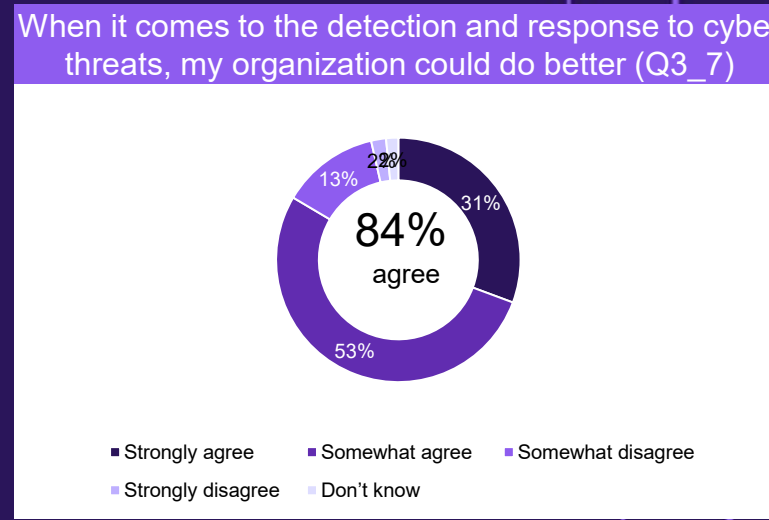
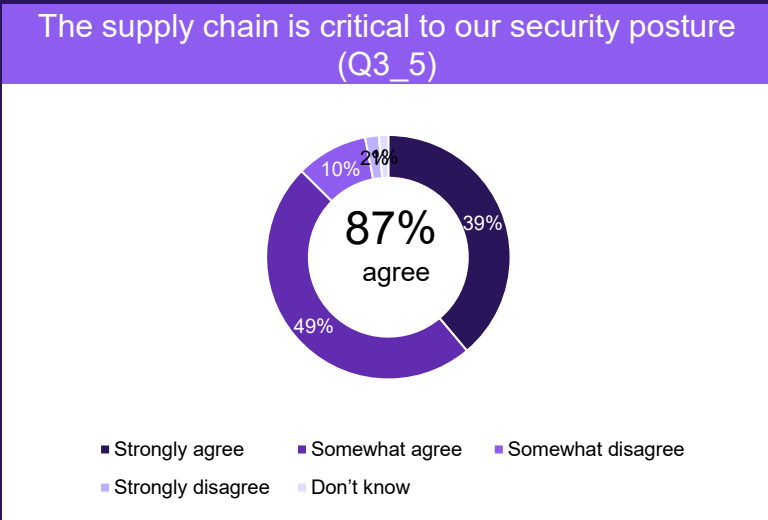


## I expect GenAI to significantly improve our security operations (Q7\_4)



Source: Vanson Bourne, Dell Technologies survey across 2,850 business and IT decision makers globally, all segments, Jun 2025 (\*countries published Feb 2025).

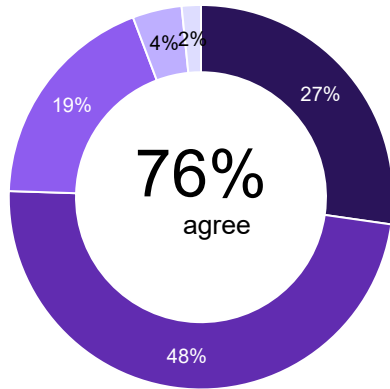
# Security Concerns



2,850 respondents

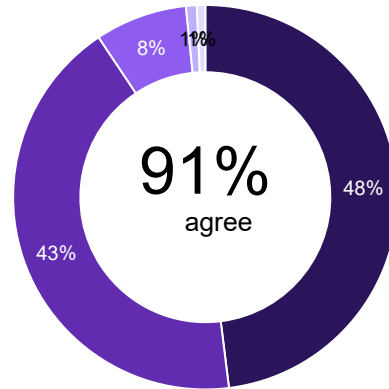
# The innovation security paradox

Balancing security and innovation is a challenge for our organization (Q3\_3)



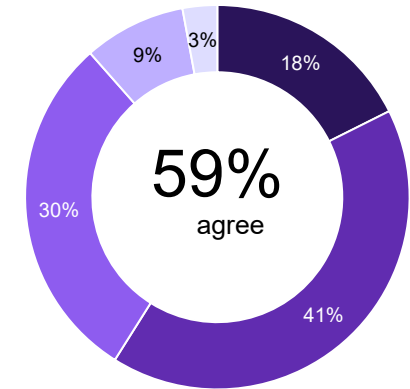
■ Strongly agree ■ Somewhat agree ■ Somewhat disagree  
■ Strongly disagree ■ Don't know

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

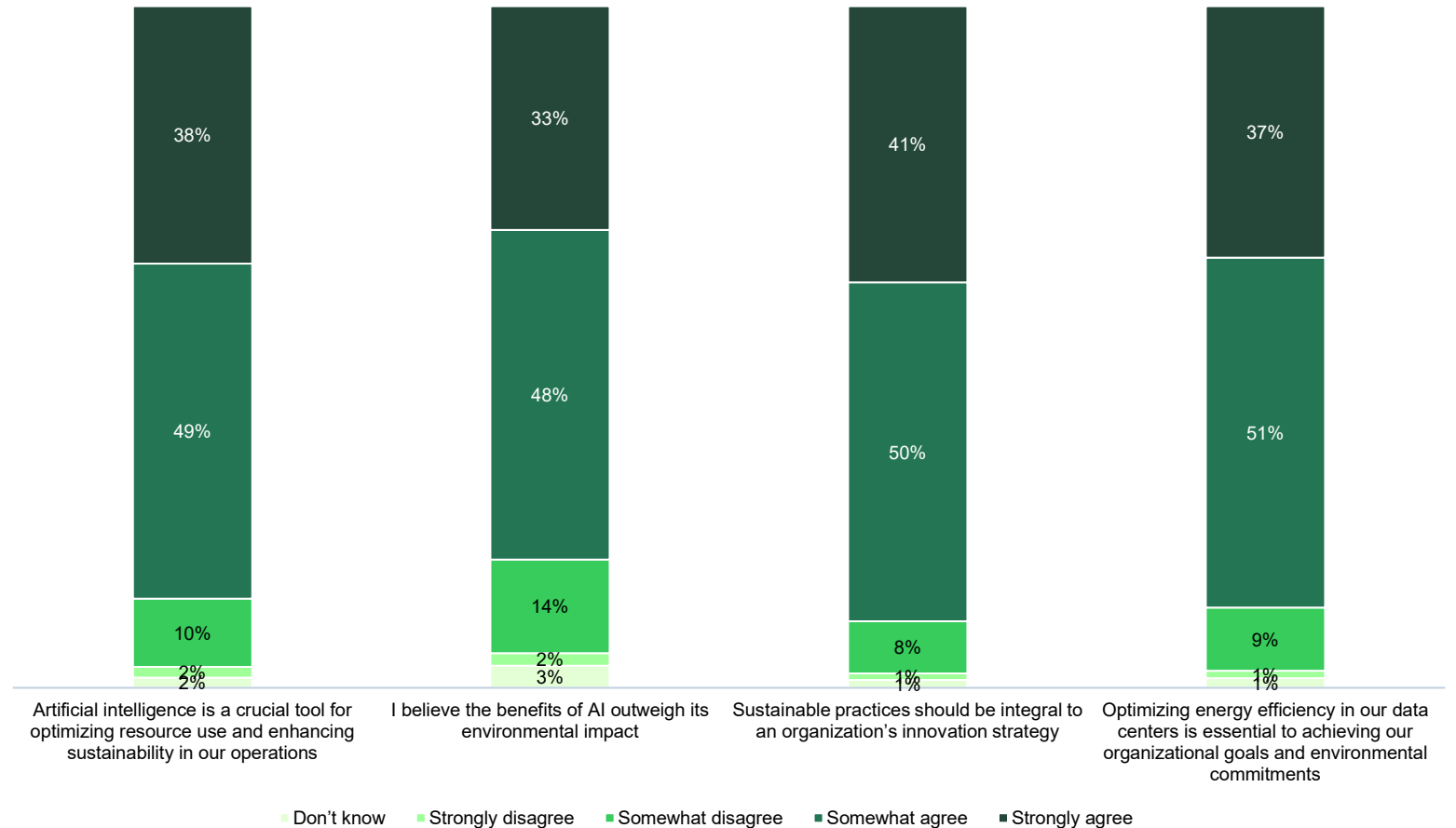
90%

**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

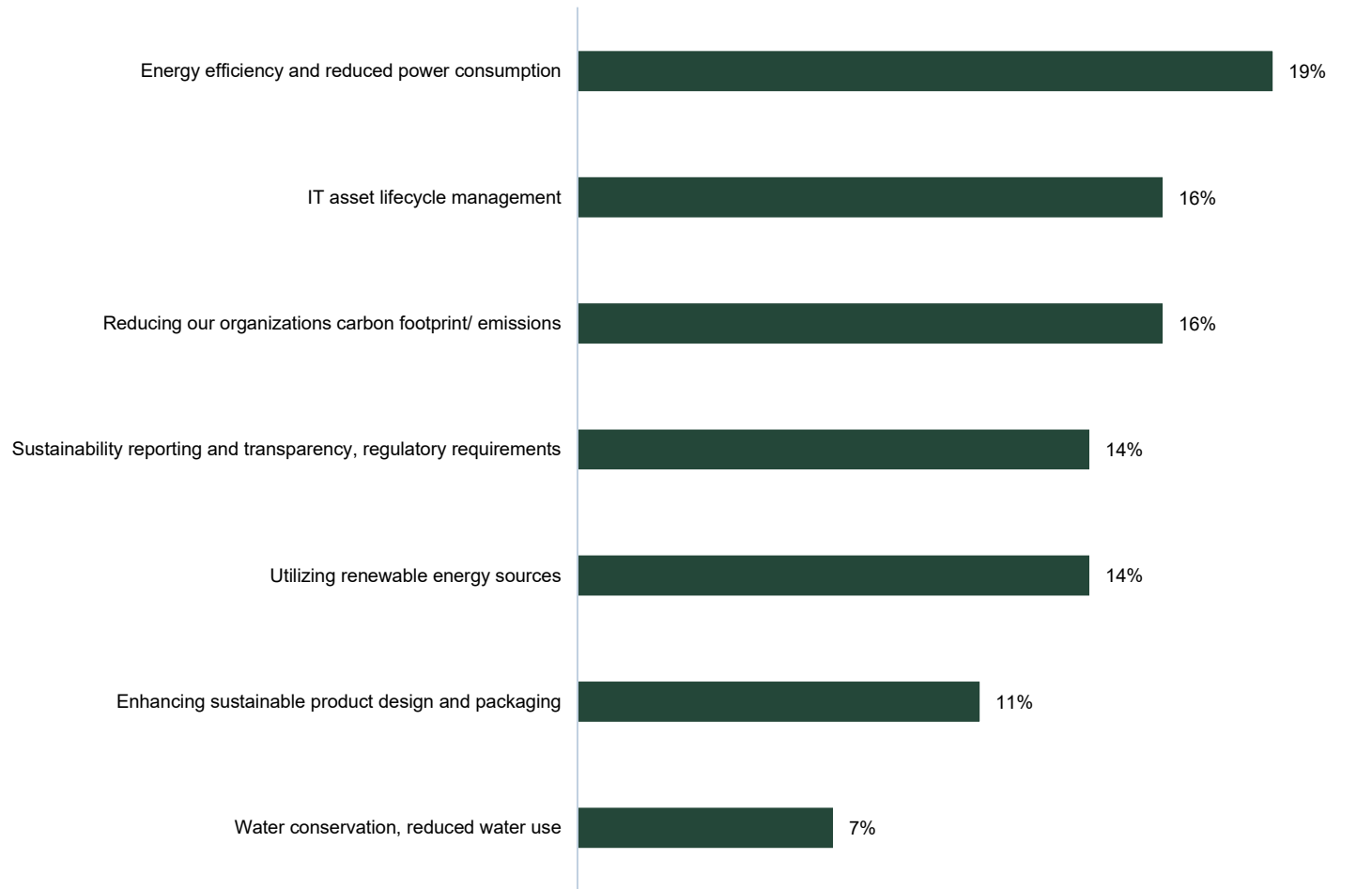
To what extent do you agree or disagree with the following (Q20)



2,850 respondents

# Sustainability strategies

## Top priority for sustainability strategy (Q19rank1)



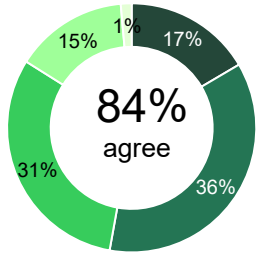
of organizations have a sustainability strategy (Q19combi)



2,850 respondents

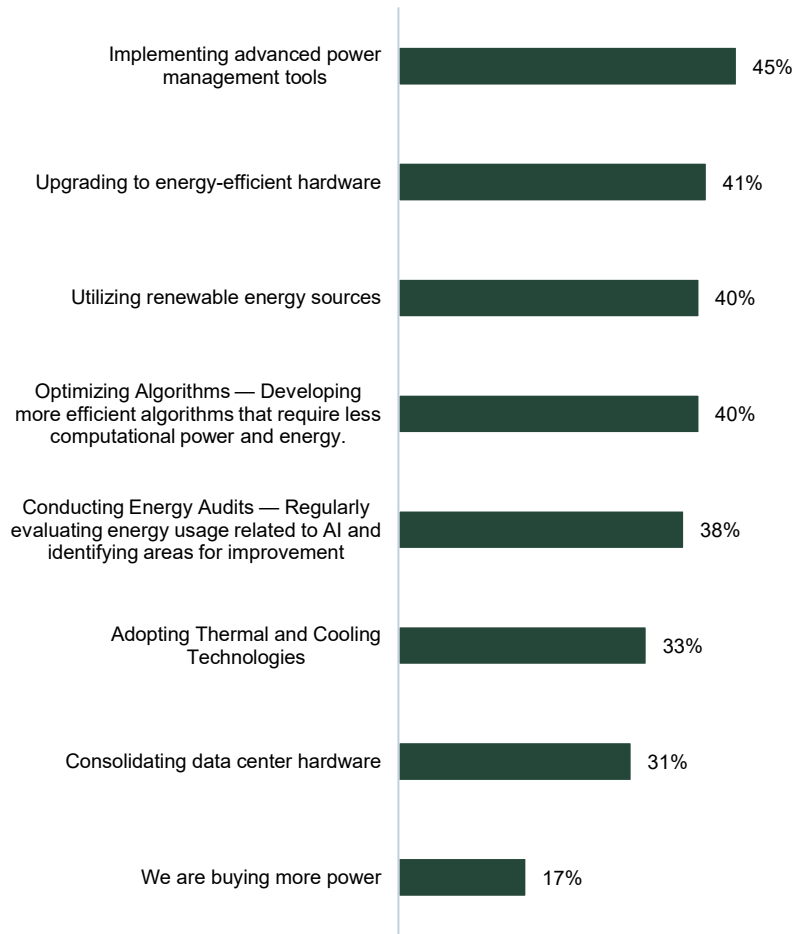
# Impact of AI on sustainability

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

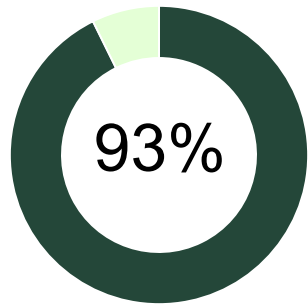


■ Very concerned   
 ■ Somewhat concerned   
 ■ A little concerned  
■ Not at all concerned   
 ■ Don't know

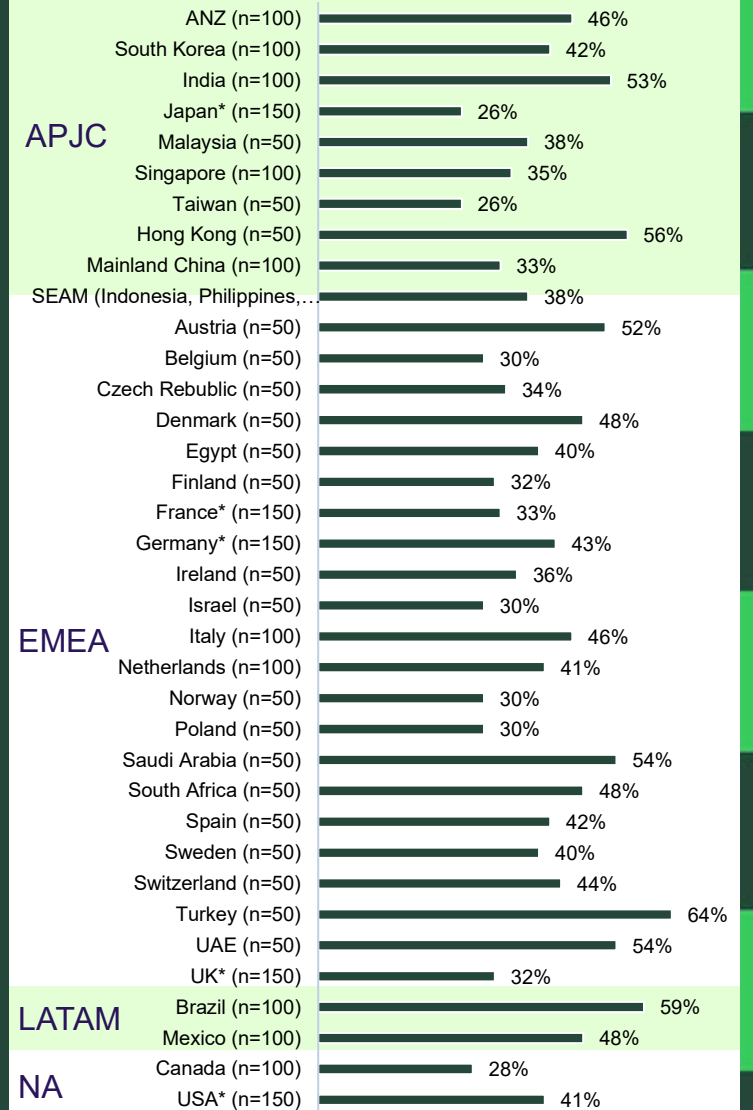
## Steps being taken to address the increasing energy demands of AI (Q22)



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



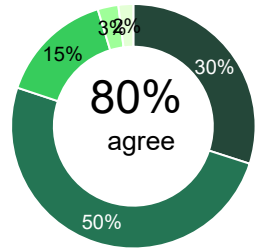
## Utilizing renewable energy sources, by country (Q22)



Source: Vanson Bourne, Dell Technologies survey across 2,850 business and IT decision makers globally, all segments, Jun 2025 (\*countries published Feb 2025).

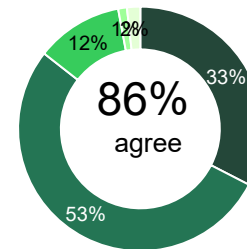
# Tech buying criteria & 3rd party help

We need the help of a third-party partner to achieve our sustainability goals (Q20\_1)



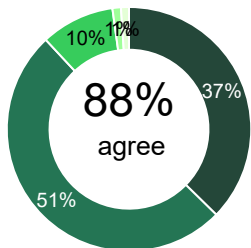
■ Strongly agree ■ Somewhat agree ■ Somewhat disagree  
■ Strongly disagree ■ Don't know

Collaborating with a third-party partner would simplify our efforts to implement circular IT practices (Q20\_7)



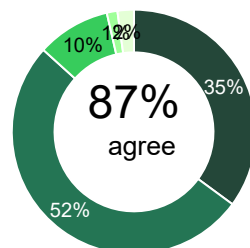
■ Strongly agree ■ Somewhat agree ■ Somewhat disagree  
■ Strongly disagree ■ Don't know

Sustainable design and energy efficiency are key factors when selecting solutions for my organization (Q20\_2)



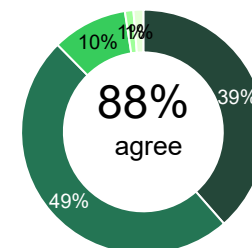
■ Strongly agree ■ Somewhat agree ■ Somewhat disagree  
■ Strongly disagree ■ Don't know

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

