

# Global IT Spending Trends and AI Adoption

## Featured Companies

Amazon.com Inc.  
AMZN US

Citrix Systems Inc.  
CTXS US

Microsoft Corp.  
MSFT US

NVIDIA Corp.  
NVDA US

Okta Inc.  
OKTA US

Palo Alto Networks Inc.  
PANW US

Salesforce.com Inc.  
CRM US

## Methodology

Online Panel Survey

## Sources

552 IT decision makers at companies with 100 or more employees:

Location:	Role:	Company Budget:	No. of Employees:	Industry:
<ul style="list-style-type: none"> <li>209 in the US</li> <li>170 in Europe</li> <li>173 in Asia</li> </ul>	<ul style="list-style-type: none"> <li>41% head of IT/CIO</li> <li>19% CTO</li> <li>14% CFO</li> <li>13% purchasing manager</li> <li>7% COO</li> <li>5% other</li> </ul>	<ul style="list-style-type: none"> <li>8% &lt;USD 1 million</li> <li>16% USD 1–9 million</li> <li>19% USD 10–49 million</li> <li>19% USD 50–99 million</li> <li>18% USD 100–249 million</li> <li>12% USD 250 million–1 billion</li> <li>9% &gt;USD 1 billion</li> </ul>	<ul style="list-style-type: none"> <li>39% 100–499</li> <li>32% 500–999</li> <li>29% 1,000+</li> </ul>	<ul style="list-style-type: none"> <li>34% technology</li> <li>14% industrial</li> <li>9% business services</li> <li>8% retail</li> <li>7% financial/insurance</li> <li>6% healthcare</li> <li>5% public sector</li> <li>3% energy</li> <li>2% restaurant</li> <li>2% media</li> <li>9% other</li> </ul>

## Global—Key Findings

- 43% expect their 2020 IT budget to increase 6% or more vs. their 2019 IT budget, while 32% expect a 1%–5% increase, 16% expect it to remain flat, and 8% expect a 1% or more decrease.
- 40% said COVID-19 has increased their company's willingness to spend on IT projects for 2020 in the past 90 days, while 20% said it has lowered their IT budget.
- Among respondents who said macro events have affected their company's willingness to spend on IT projects for 2020 in the past 90 days, 41% said their overall IT budget increased 6% or more in the past 90 days and 35% said 1%–5%, while 15% said it remained flat, and 10% said it decreased 1% or more.
- The top IT spending priority in 2020 is security (22%), followed by cloud computing (11%).
- In the event of cuts to the IT budget, security and cloud computing would be affected the most.
- The technology that respondents expect to have the greatest impact on their companies in the next five years is cybersecurity (37%), followed by IoT (34%) and AI/machine learning (30%).
- 32% have one or more ongoing AI projects currently, while 25% said AI is already incorporated in some processes or offerings, 20% have none but plan to in the future, and 13% said AI is extensively incorporated in their organization.
- Among respondents who have one or more ongoing AI projects currently, 98% said results from big data and AI are measurable or very measurable.
- Among respondents who have one or more ongoing AI projects currently, 92% started at least some last year, and 97% plan to start at least some this year.

## Global—Key Findings, Cont.

- Among respondents who have one or more ongoing AI projects currently, the top objective of investment is advanced analytics/better decisions (30%), followed by improved customer service (23%) and innovation/disruption (20%).
- The current mix of cloud workloads is 39% private, 33% public, and 28% hybrid. The expected mix in five years is 39% private, 30% public, and 31% hybrid.
- The top security priority in 2020 is cloud security (32%), followed by network security (31%) and data security (28%).
- The top security vendor that respondents plan the largest percentage spending increase with in 2020 vs. 2019 is **Microsoft** (46%), followed by Cisco (**Cisco Systems**) (32%) and Amazon (**Amazon.com**) (30%).

## US—Key Findings

- 48% expect their 2020 IT budget to increase 6% or more vs. their 2019 IT budget, while 25% expect a 1%–5% increase, 19% expect it to remain flat, and 8% expect a 1%–10% decrease.
- 47% said COVID-19 has increased their company's willingness to spend on IT projects for 2020 in the past 90 days, while 16% said it has lowered their IT budget.
- Among respondents who said macro events have affected their company's willingness to spend on IT projects for 2020 in the past 90 days, 54% said their overall IT budget increased 6% or more in the past 90 days and 27% said 1%–5%, while 10% said it remained flat, and 8% said it decreased 1% or more.
- The top IT spending priority in 2020 is security (22%), followed by networking (14%) and cloud computing (9%).
- In the event of cuts to the IT budget, security, cloud computing, and digital marketing would be affected the most.
- The technology that respondents expect to have the greatest impact on their companies in the next five years is IoT (37%), followed by factory automation (36%), the hybrid cloud (30%), and the public cloud (25%).
- 28% have one or more ongoing AI projects currently, while 24% said AI is already incorporated in some processes or offerings, 22% said AI is extensively incorporated in their organization, and 13% have none but plan to in the future. 12% have no plans to adopt AI.
- Among respondents who have one or more ongoing AI projects currently, 100% said results from big data and AI are measurable or very measurable.
- Among respondents who have one or more ongoing AI projects currently, 93% started at least some last year, and 97% plan to start at least some this year.
- Among respondents who have one or more ongoing AI projects currently, the top objective of investment is advanced analytics/better decisions (28%), followed by improved customer service (26%) and innovation/disruption (19%).
- The current mix of cloud workloads is 42% private, 31% public, and 28% hybrid. The expected mix in five years is 41% private, 27% public, and 31% hybrid.
- The top security priority in 2020 is cloud security (28%), followed by data security (27%) and network security (26%).
- The top security vendor that respondents plan the largest percentage spending increase with in 2020 vs. 2019 is Microsoft (47%), followed by Amazon (37%) and Cisco (29%).

## Europe—Key Findings

- 43% expect their 2020 IT budget to increase 6% or more vs. their 2019 IT budget, while 36% expect a 1%–5% increase, 12% expect it to remain flat, and 9% expect a 1%–10% decrease.
- 33% said COVID-19 has increased their company's willingness to spend on IT projects for 2020 in the past 90 days, while 16% said it has lowered their IT budget.
- Among respondents who said macro events have affected their company's willingness to spend on IT projects for 2020 in the past 90 days, 39% said their overall IT budget increased 1%–5% in the past 90 days and 36% said 6% or more, while 16% said it remained flat, and 10% said it decreased 1% or more.
- The top IT spending priority in 2020 is security (25%), followed by cloud computing (11%).
- In the event of cuts to the IT budget, security, infrastructure/data center, and cloud computing would be affected the most.

## Europe—Key Findings, Cont.

- The technology that respondents expect to have the greatest impact on their companies in the next five years is cybersecurity (40%), followed by AI/machine learning (36%).
- 34% have one or more ongoing AI projects currently, while 28% said AI is already incorporated in some processes or offerings, 24% have none but plan to in the future, and 6% said AI is extensively incorporated in their organization. 8% have no plans to adopt AI.
- Among respondents who have one or more ongoing AI projects currently, 97% said results from big data and AI are measurable or very measurable.
- Among respondents who have one or more ongoing AI projects currently, 92% started at least some last year, and 97% plan to start at least some this year.
- Among respondents who have one or more ongoing AI projects currently, the top objective of investment is advanced analytics/better decisions (28%), followed by innovation/disruption (23%) and improved customer service (21%).
- The current mix of cloud workloads is 41% private, 31% public, and 28% hybrid. The expected mix in five years is 41% private, 30% hybrid, and 29% public.
- The top security priority in 2020 is cloud security (32%), followed by data security (30%).
- The top security vendor that respondents plan the largest percentage spending increase with in 2020 vs. 2019 is Microsoft (43%), followed by Cisco (35%) and **McAfee** (29%).

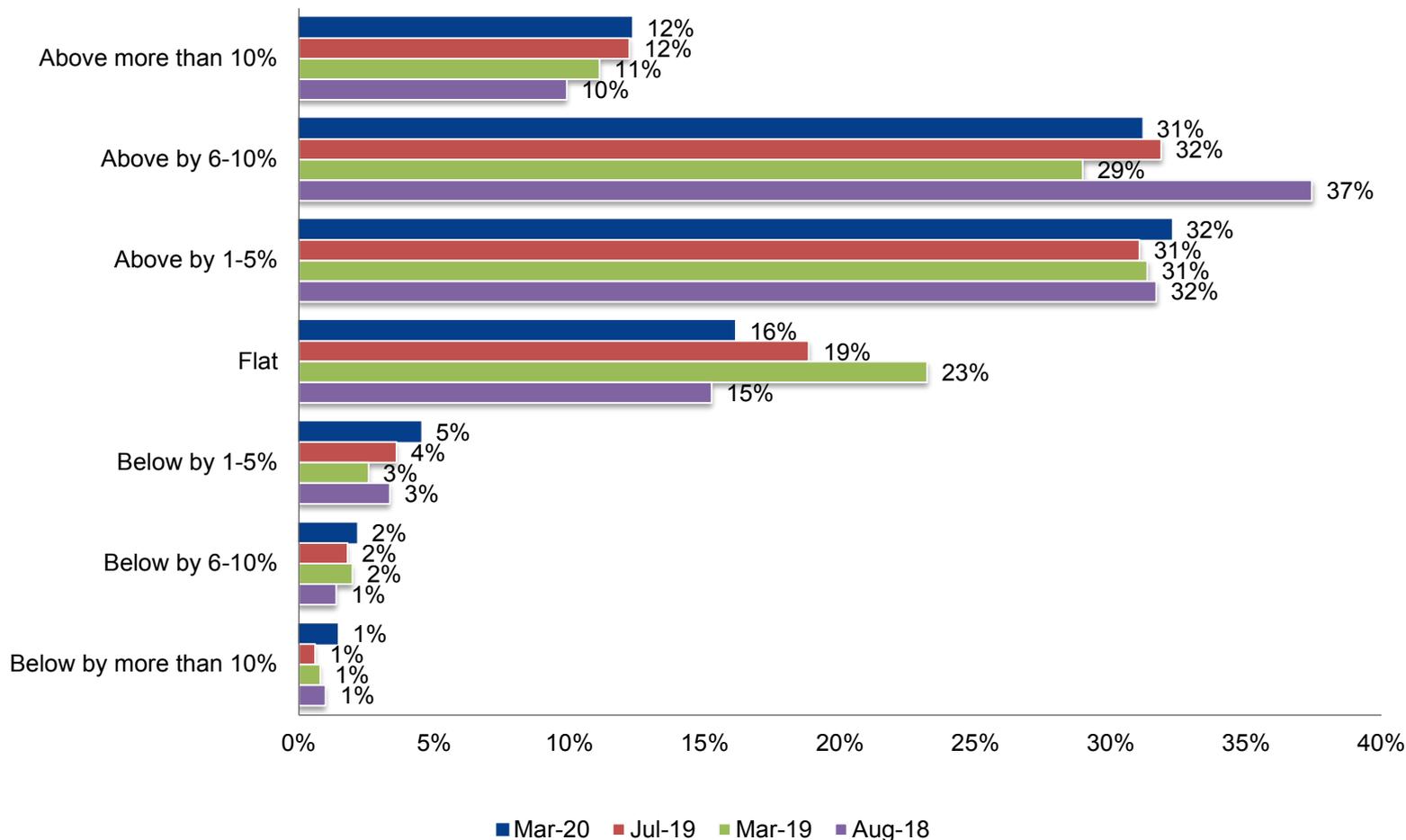
## Asia—Key Findings

- 39% expect their 2020 IT budget to increase 6% or more vs. their 2019 IT budget, while 37% expect a 1%–5% increase, 16% expect it to remain flat, and 8% expect it a 1% or more decrease.
- 40% said COVID-19 has increased their company's willingness to spend on IT projects for 2020 in the past 90 days, while 29% said it has lowered their IT budget.
- Among respondents who said macro events have affected their company's willingness to spend on IT projects for 2020 in the past 90 days, 38% said their overall IT budget increased 1%–5% in the past 90 days and 29% said 6% or more, while 21% said it remained flat, and 11% said it decreased 1% or more.
- The top IT spending priority in 2020 is security (20%), followed by cloud computing (13%).
- In the event of cuts to the IT budget, security and cloud computing would be affected the most.
- The technologies that respondents expect to have the greatest impact on their companies in the next five years are AI/machine learning, cybersecurity, and IoT (34% each).
- 36% have one or more ongoing AI projects currently, while 24% have none but plan to in the future, 23% said AI is already incorporated in some processes or offerings, and 10% said AI is extensively incorporated in their organization. 8% have no plans to adopt AI.
- Among respondents who have one or more ongoing AI projects currently, 97% said results from big data and AI are measurable or very measurable.
- Among respondents who have one or more ongoing AI projects currently, 93% started at least some last year, and 97% plan to start at least some this year.
- Among respondents who have one or more ongoing AI projects currently, the top objective of investment is advanced analytics/better decisions (34%), followed by improved customer service (20%) and innovation/disruption (18%).
- The current mix of cloud workloads is 34% private, 36% public, and 30% hybrid. The expected mix in five years is 33% public, 34% private, and 33% hybrid.
- The top security priority in 2020 is network security (38%), followed by cloud security (36%).
- The top security vendor that respondents plan the largest percentage spending increase with in 2020 vs. 2019 is Microsoft (47%), followed by Cisco (33%) and Amazon (28%).

# Global—2020 IT Budget Expectations

43% expect their 2020 IT budget to increase 6% or more vs. their 2019 IT budget, while 32% expect a 1%–5% increase, 16% expect it to remain flat, and 8% expect a 1% or more decrease.

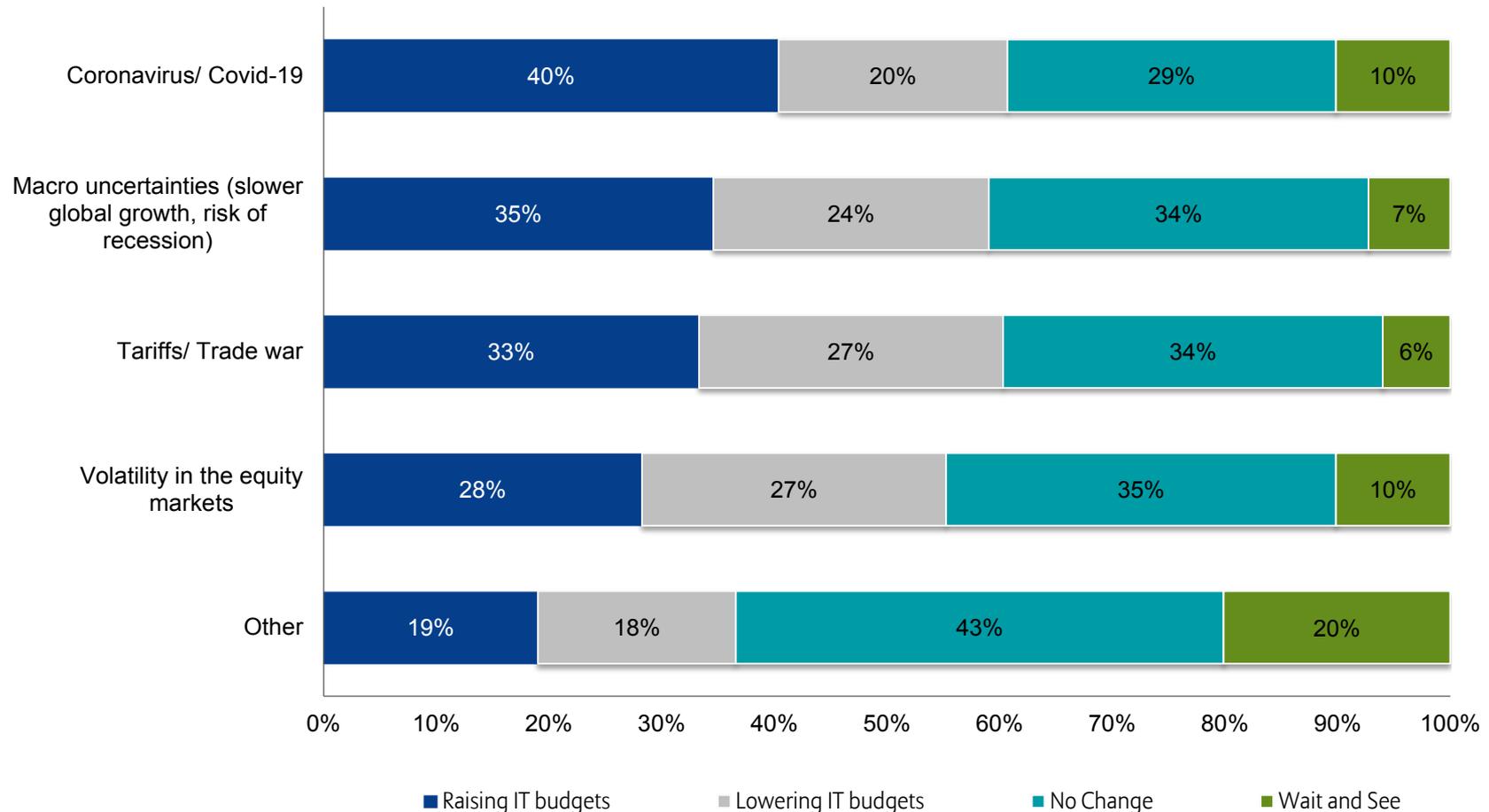
*How do you expect your 2020 IT budget to compare to your 2019 IT budget?*



# Global—Impact of Macro Events on 2020 IT Budget

40% said COVID-19 has increased their company's willingness to spend on IT projects for 2020 in the past 90 days, while 20% said it has lowered their IT budget.

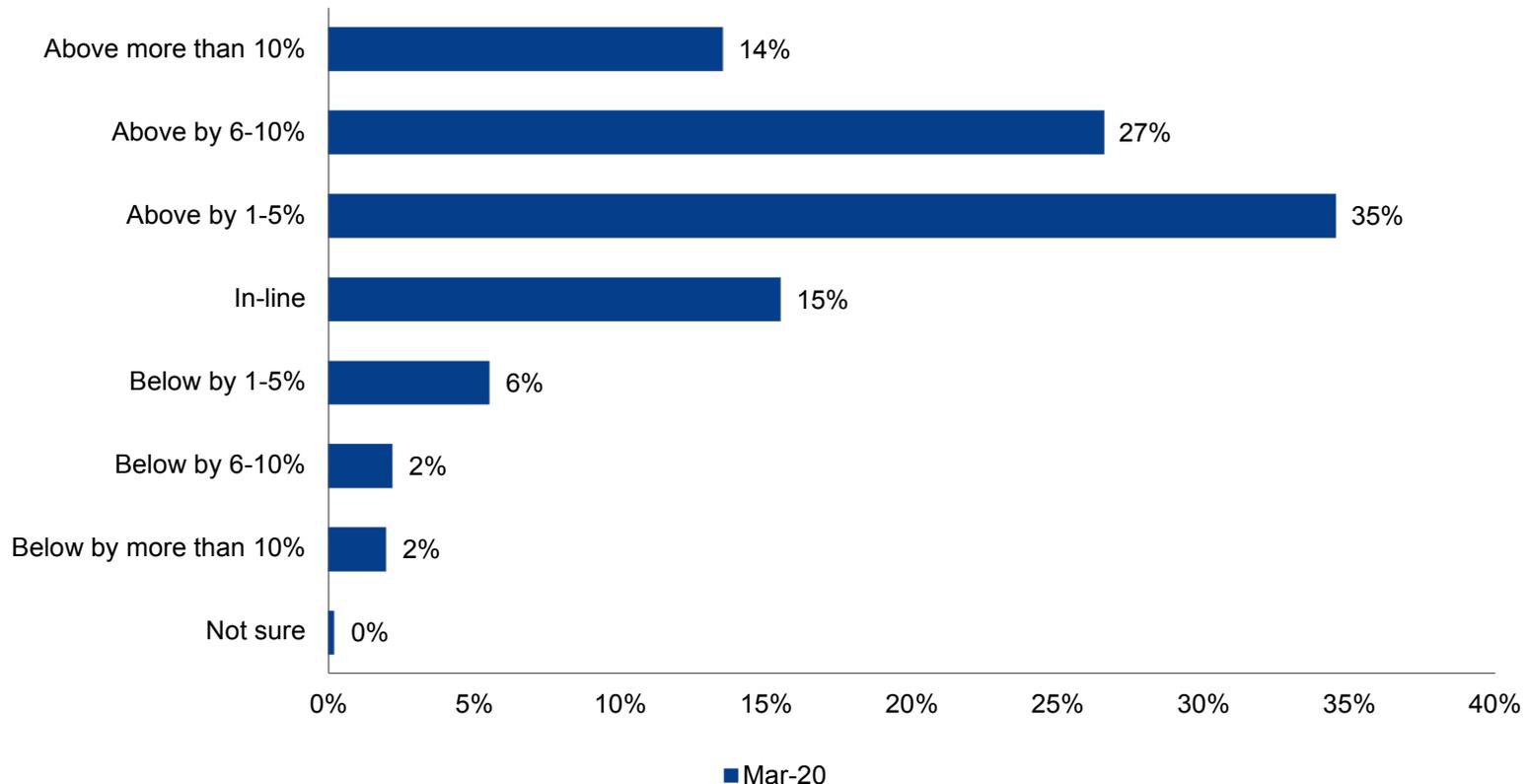
*How have the following affected your company's willingness to spend on IT projects for 2020 in the past 90 days, if at all?*



## Global—% Impact of Macro Events on 2020 IT Budget

Among respondents who said macro events have affected their company's willingness to spend on IT projects for 2020 in the past 90 days, 41% said their overall IT budget increased 6% or more in the past 90 days and 35% said 1%–5%, while 15% said it remained flat, and 10% said it decreased 1% or more.

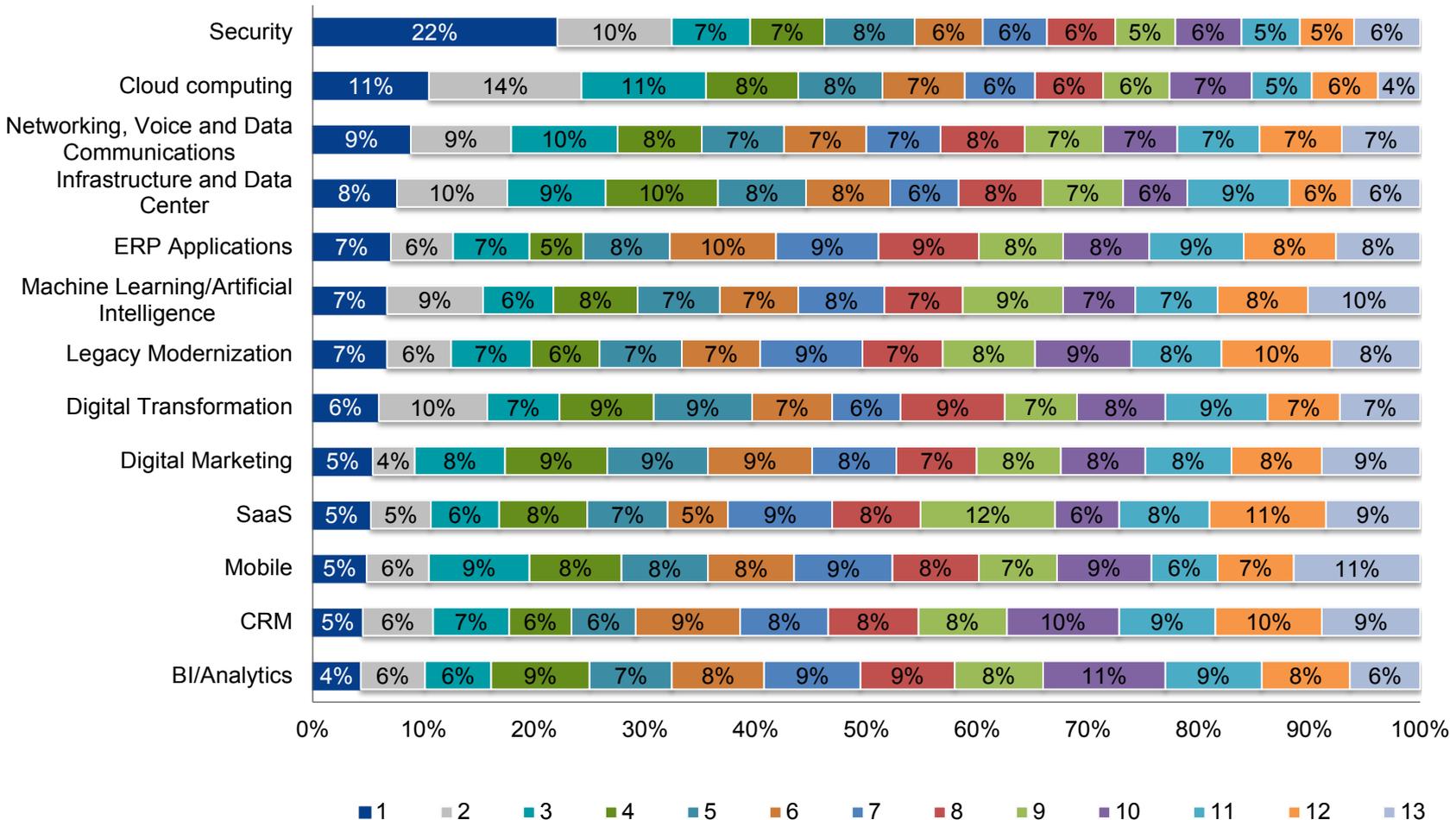
*In the previous question, you indicated that macro events (e.g., tariffs) have affected your company's willingness to spend on IT projects for 2020 in the past 90 days. Can you estimate by how much your overall 2020 IT budget has changed in the past 90 days?*



# Global—IT Spending Priorities in 2020

The top IT spending priority in 2020 is security (22%), followed by cloud computing (11%).

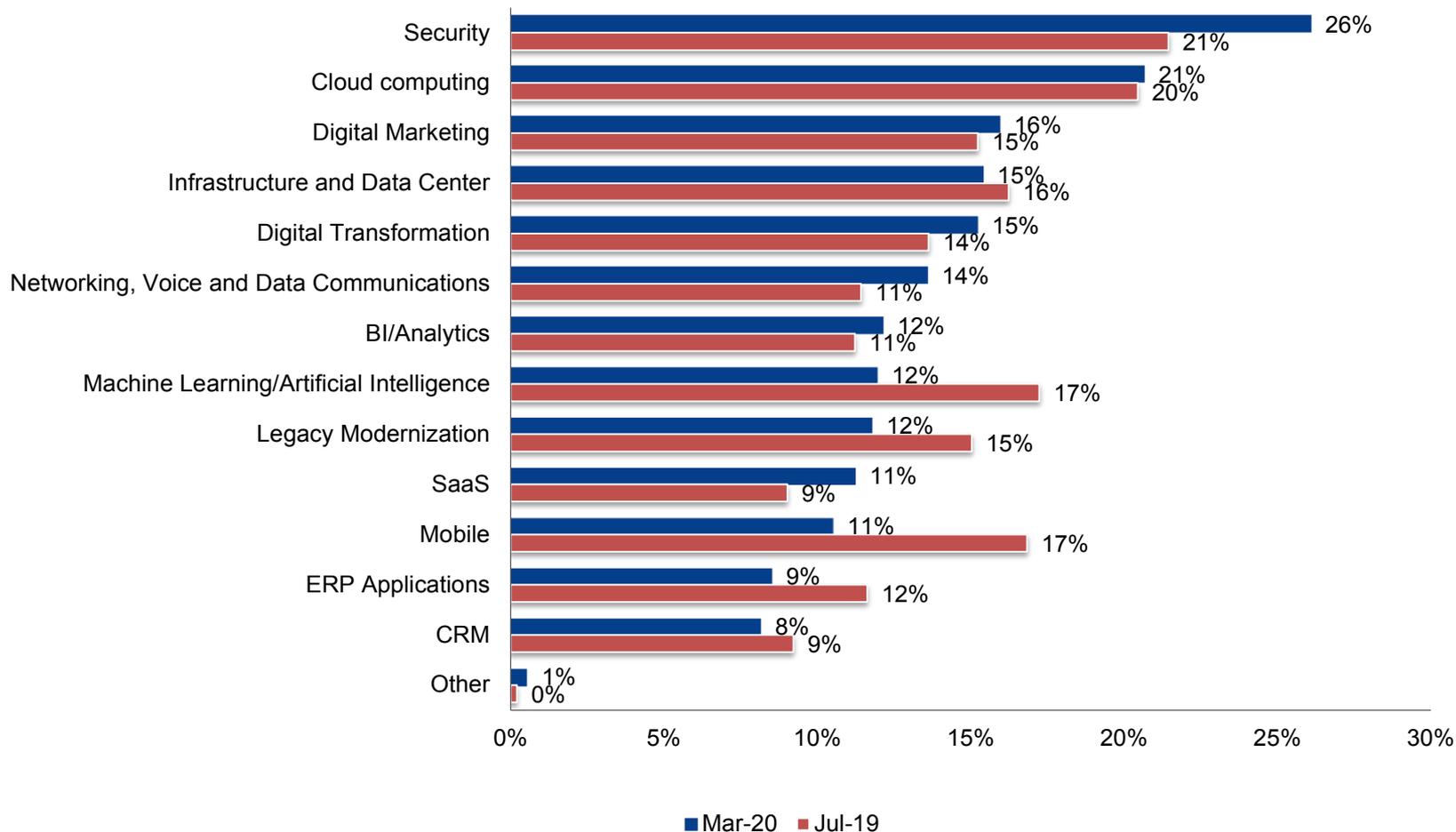
Please drag and drop the following in order of your top IT spending priorities for 2020, with No. 1 being the most important.



# Global—Categories of Spend Vulnerable to Budget Cuts

In the event of cuts to the IT budget, security and cloud computing would be affected the most.

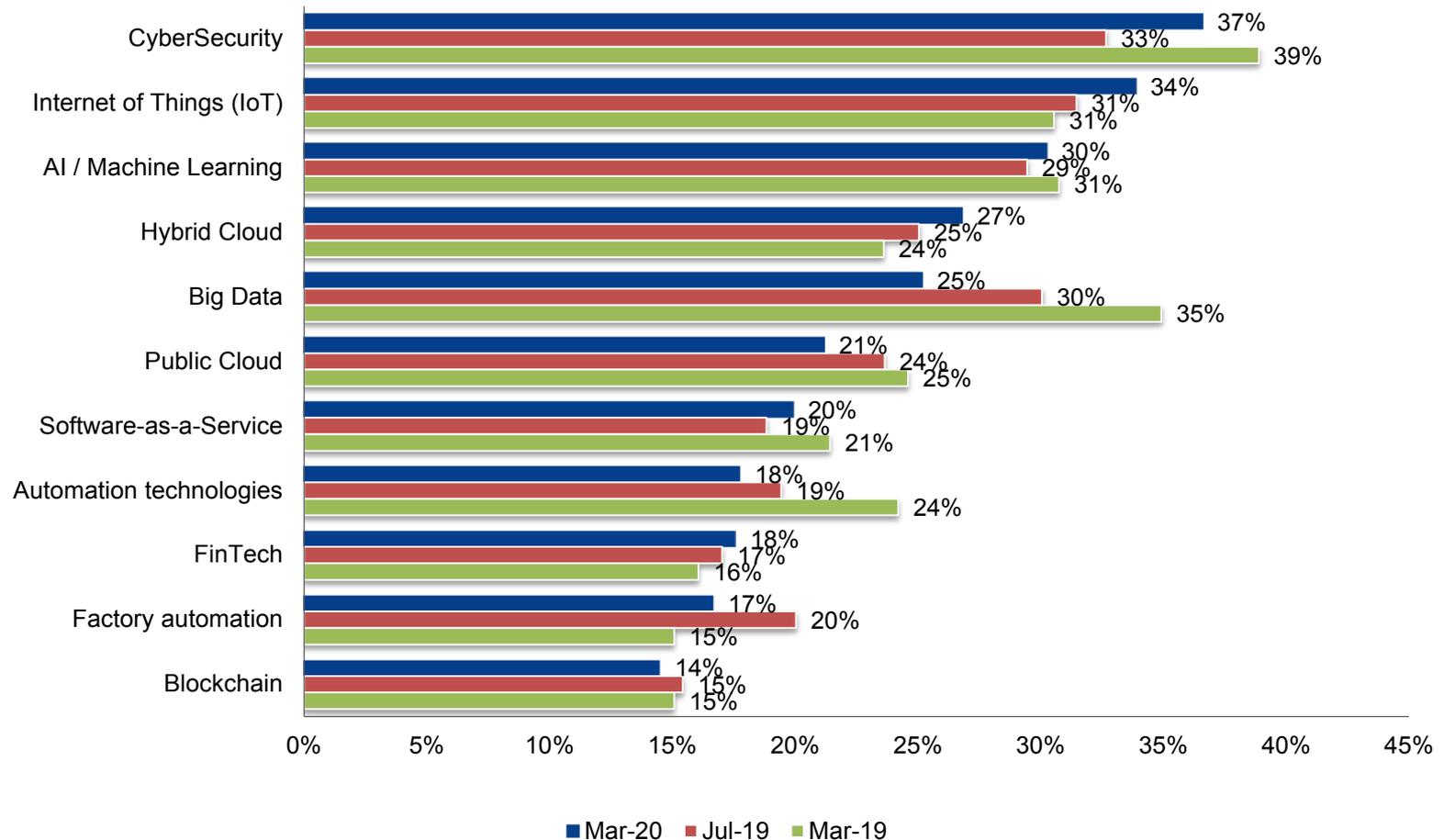
*In the event of cuts to your IT budget, which two broad categories of spending would be affected the most?*



# Global—Technology with the Greatest Impact in the Next 5 Years

The technology that respondents expect to have the greatest impact on their companies in the next five years is cybersecurity (37%), followed by IoT (34%) and AI/machine learning (30%).

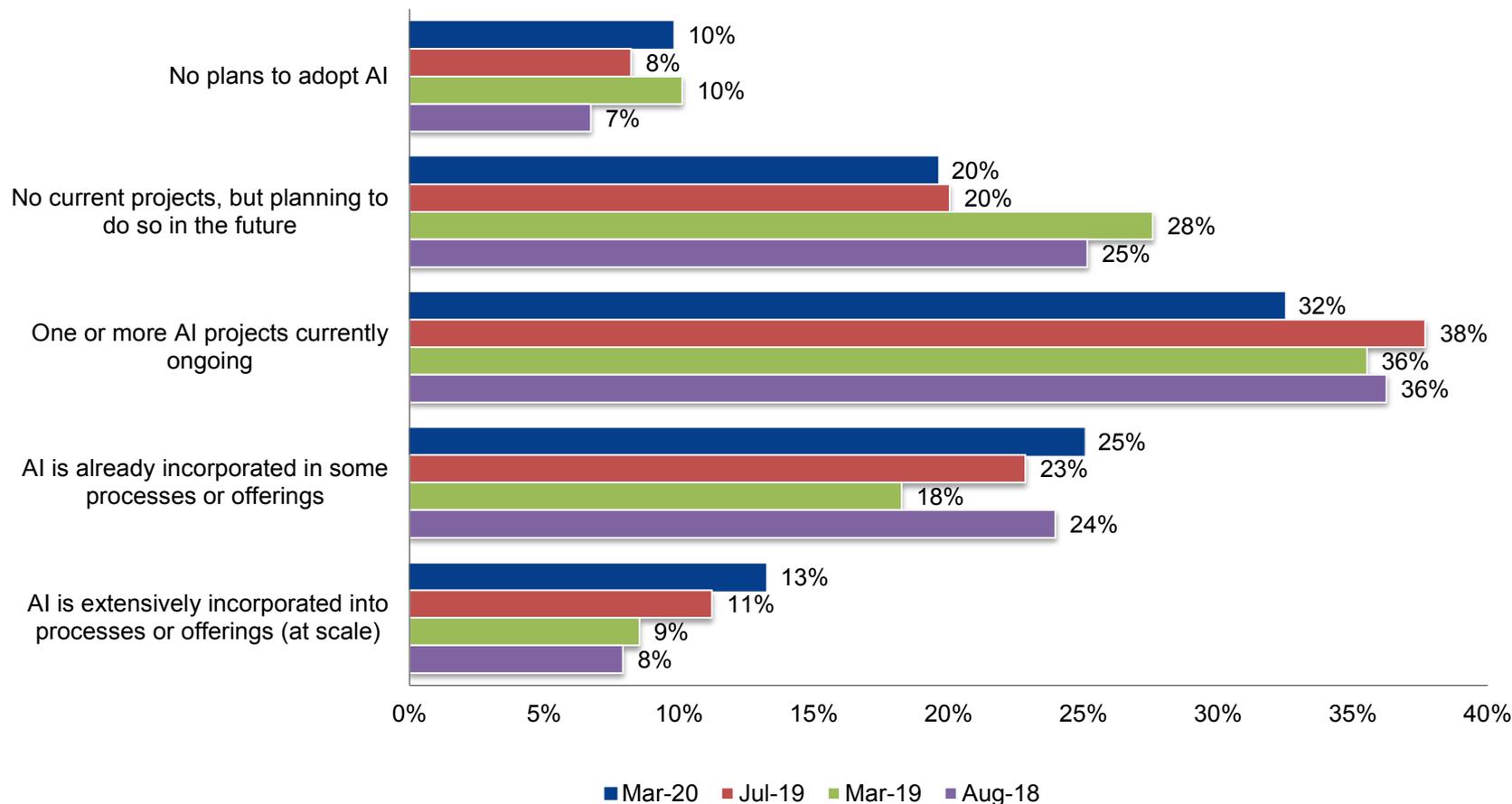
*Which technology do you expect to have the greatest impact on your company in the next five years? (Choose up to three.)*



# Global—AI Adoption

32% have one or more ongoing AI projects currently, while 25% said AI is already incorporated in some processes or offerings, 20% have none but plan to in the future, and 13% said AI is extensively incorporated in their organization.

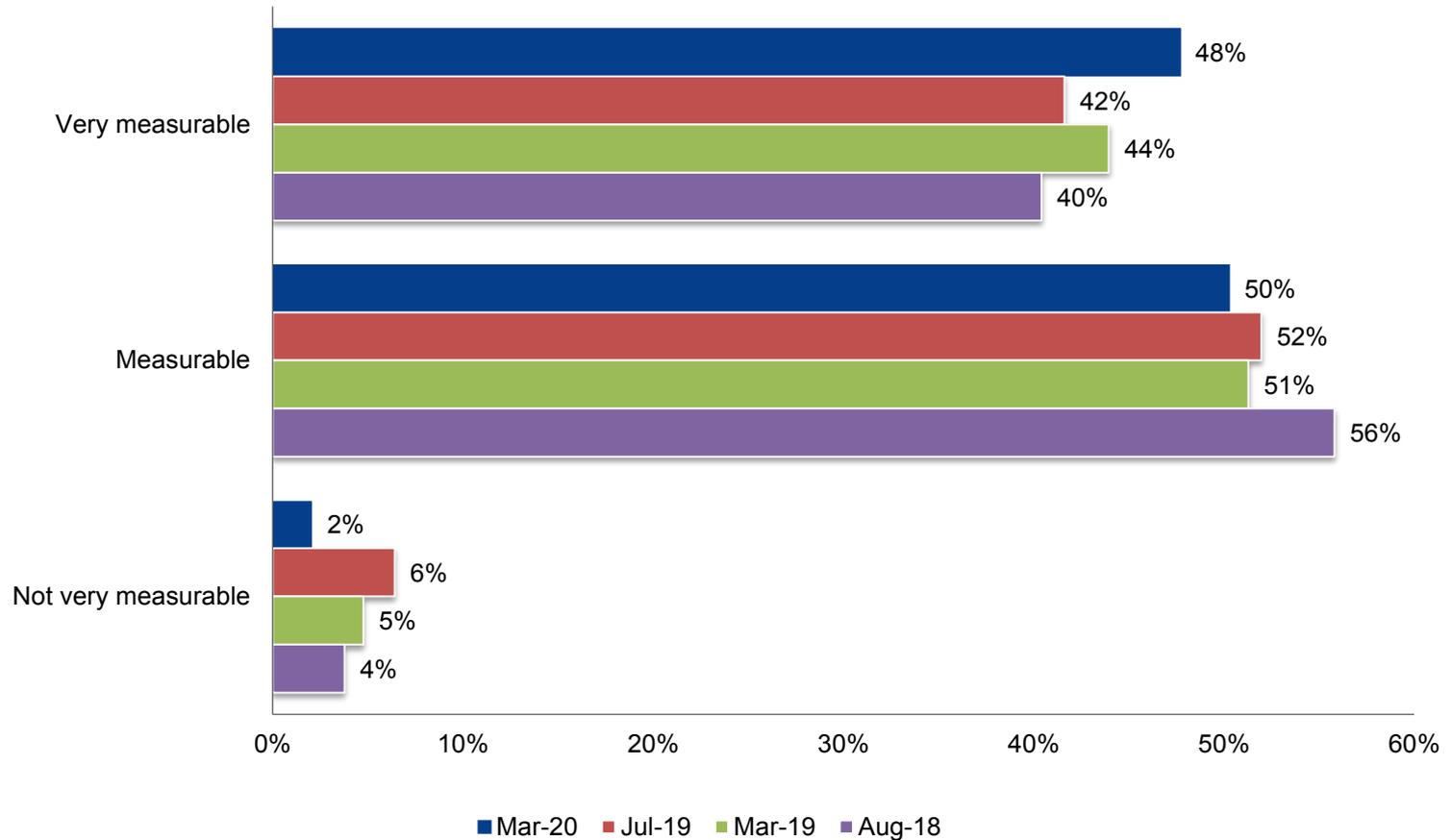
*What is the level of AI adoption in your organization?*



# Global—Measurability of Results from Big Data and AI

Among respondents who have one or more ongoing AI projects currently, 98% said results from big data and AI are measurable or very measurable.

*Do you see measurable results from big data and AI?*

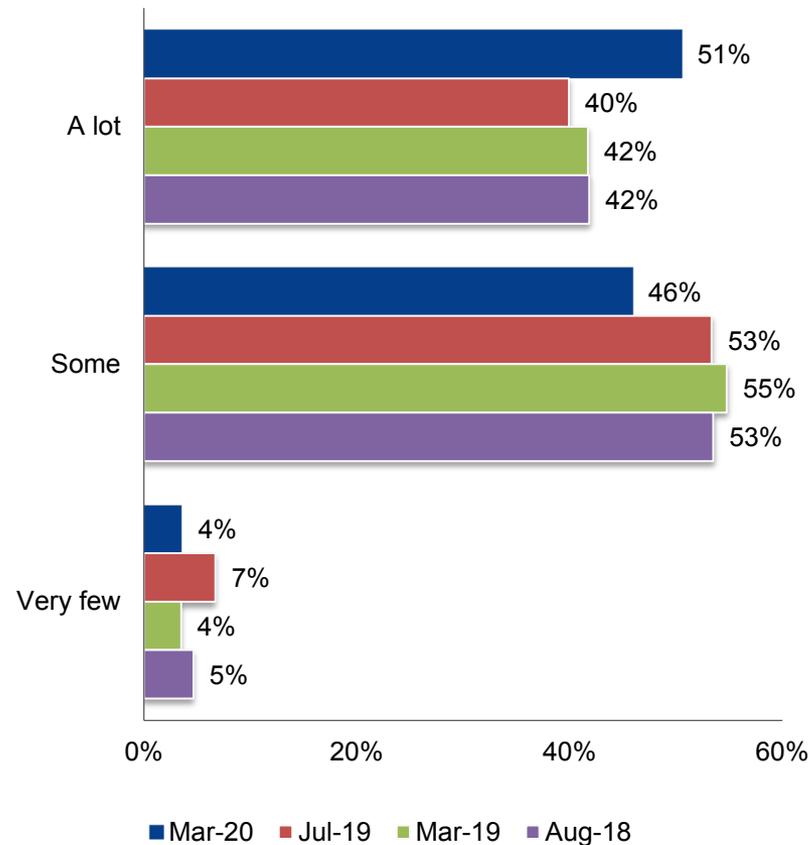
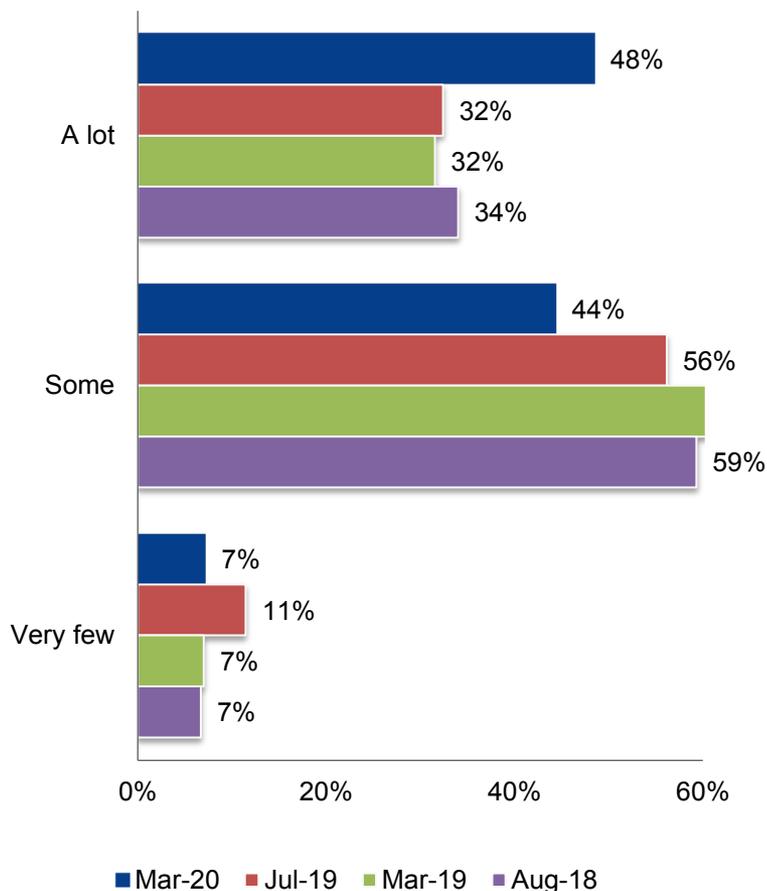


# Global—No. of AI Projects Underway or Expected

Among respondents who have one or more ongoing AI projects currently, 92% started at least some last year, and 97% plan to start at least some this year.

*How many AI projects did your company start **last year**?*

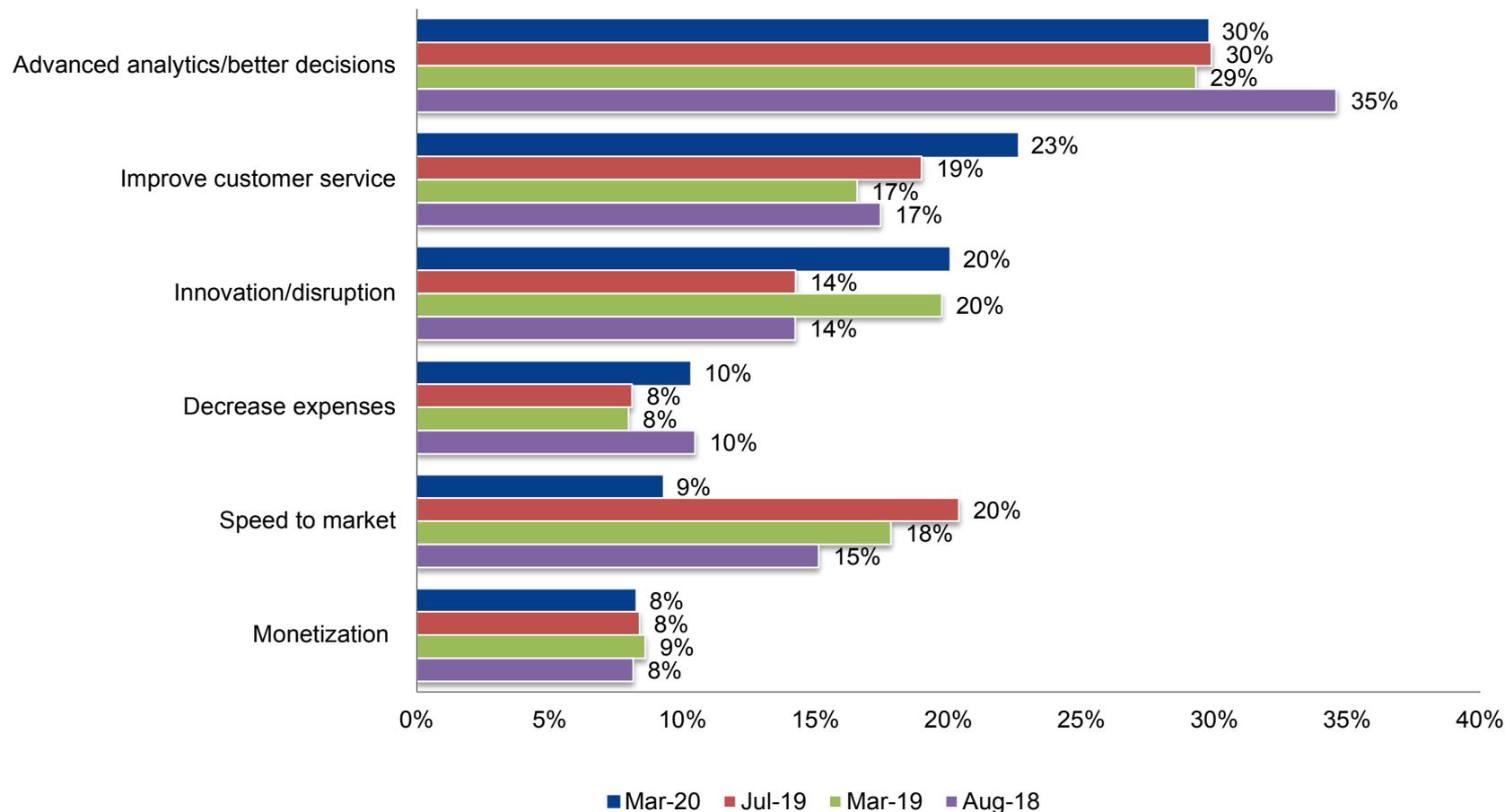
*How many AI projects do you expect your company to start **this year**?*



## Global—Top Objective of AI Investment

Among respondents who have one or more ongoing AI projects currently, the top objective of investment is advanced analytics/better decisions (30%), followed by improved customer service (23%) and innovation/disruption (20%).

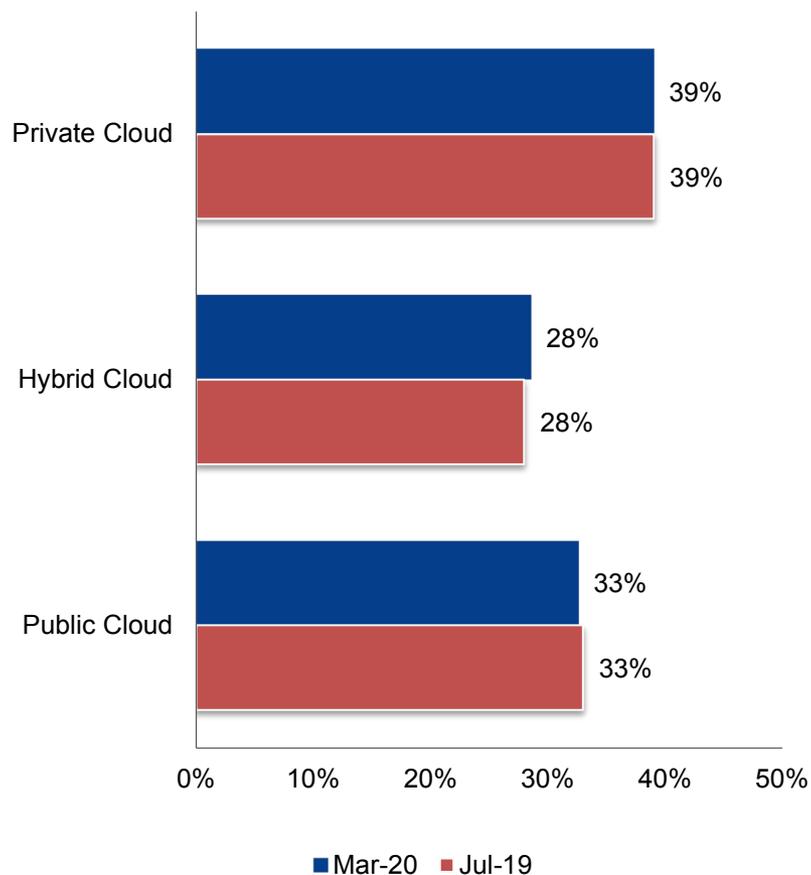
*What is the top objective of AI investment? (Choose one.)*



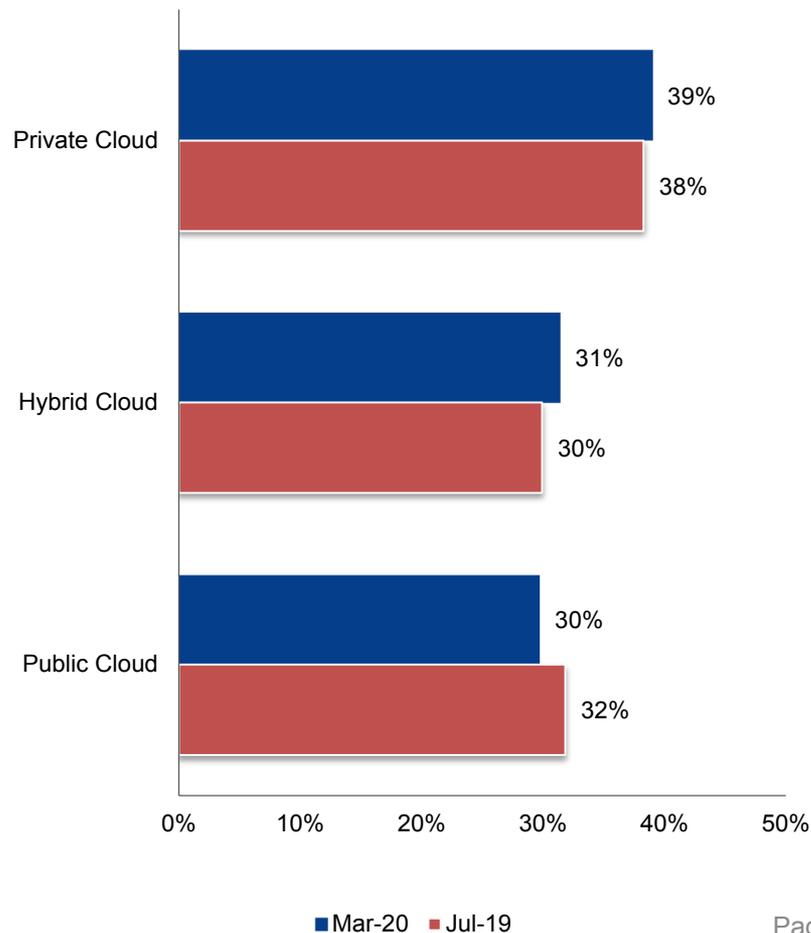
# Global—Cloud Mix

The current mix of cloud workloads is 39% private, 33% public, and 28% hybrid. The expected mix in five years is 39% private, 30% public, and 31% hybrid.

*What is your current mix of private, hybrid, and public cloud workloads?*



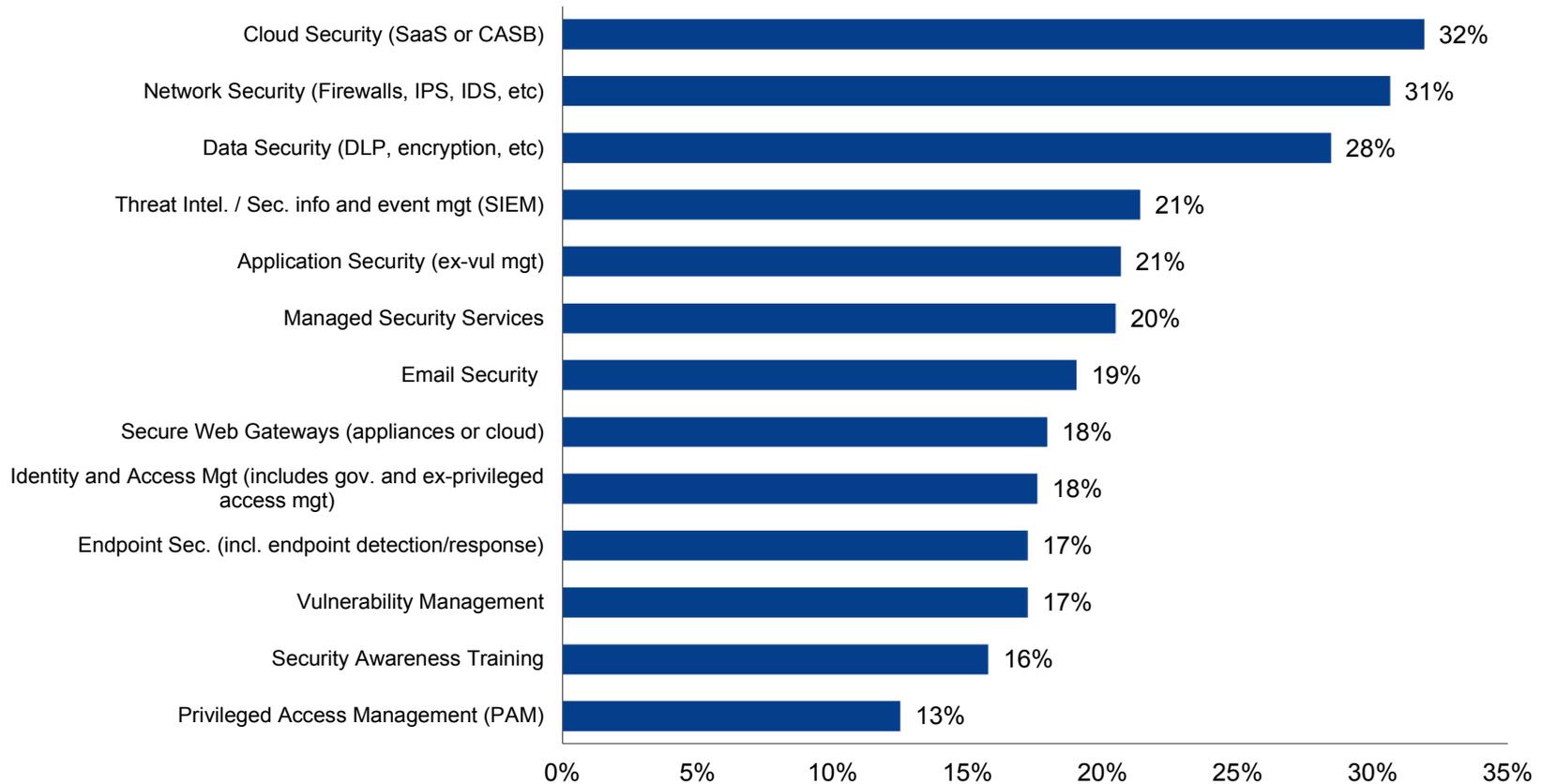
*What do you think your mix will be in five years of private, hybrid, and public cloud workloads?*



# Global—Security Priorities

The top security priority in 2020 is cloud security (32%), followed by network security (31%) and data security (28%).

*Which areas of security are your organization's top priorities in terms of spending in the next 12 months (2020)? (Select the top three.)*

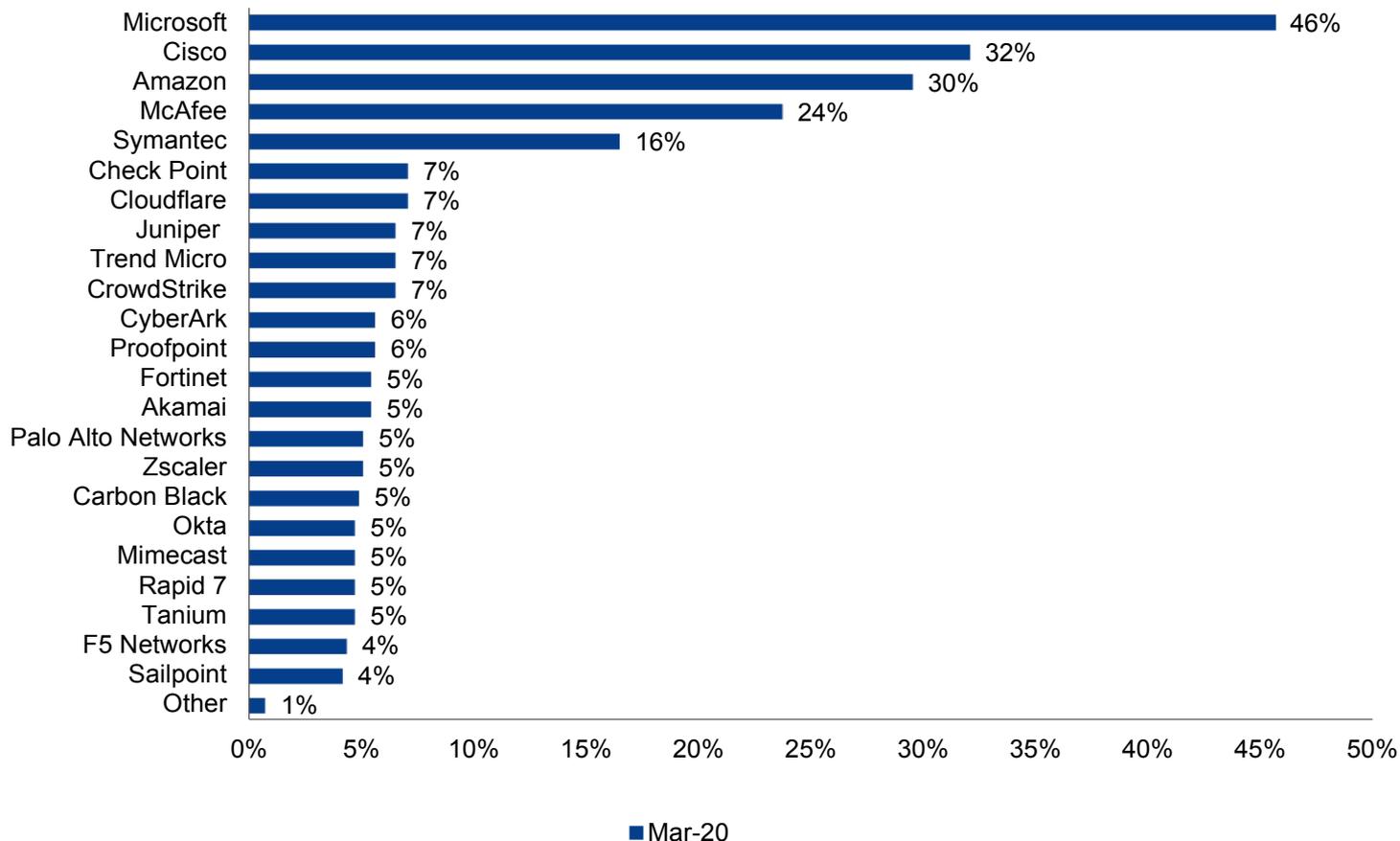


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# Global—Security Vendors

The top security vendor that respondents plan the largest percentage spending increase with in 2020 vs. 2019 is Microsoft (46%), followed by Cisco (32%) and Amazon (30%).

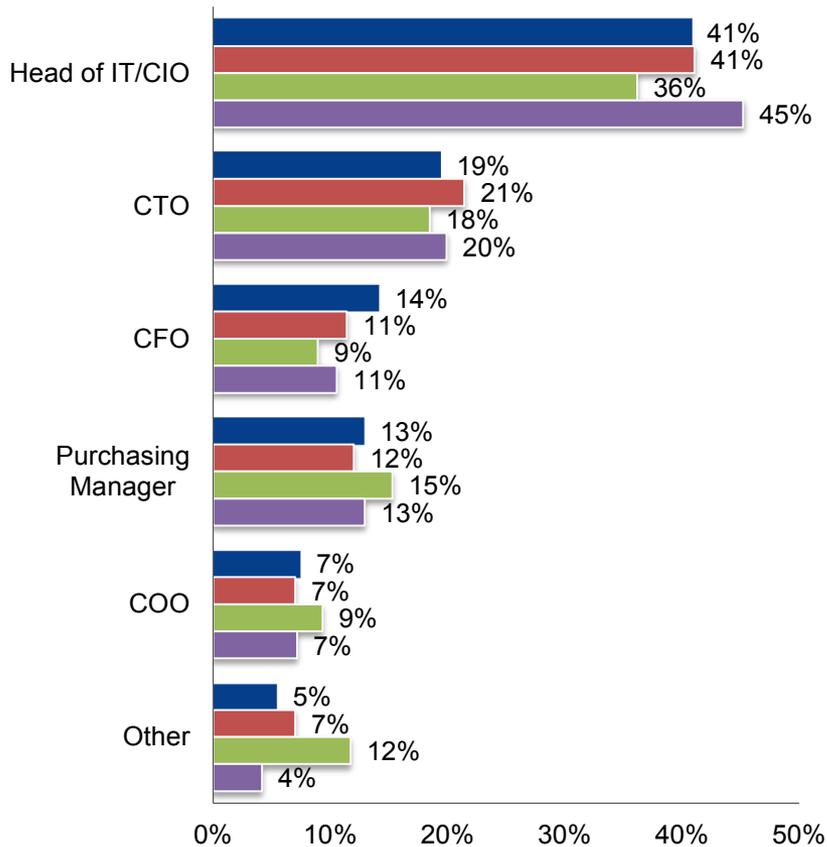
*Choose the top security vendors that you plan the largest percentage spend increase in 2020 vs. 2019. (Select up to three.)*



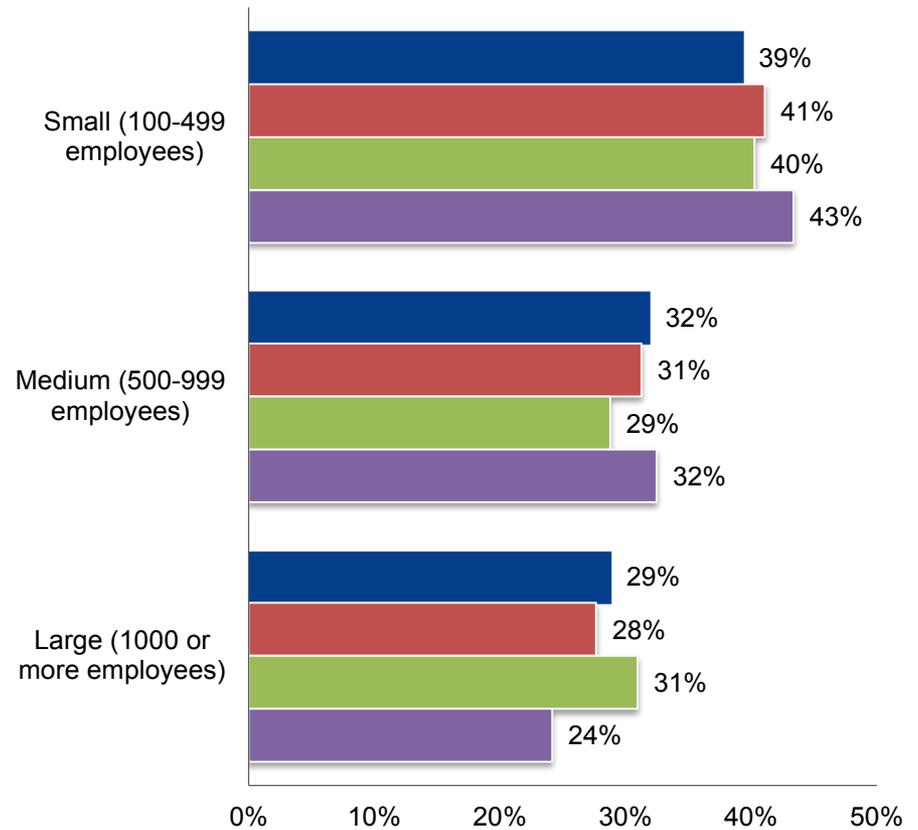
# Global—Demographic Information (Role with Company and No. of Employees)

This survey comprised 552 IT decision makers at companies with 100 or more employees: 209 in the US, 170 in Europe, and 173 in Asia.

*What is your role with the company?*



*How many total employees are there at your company?*



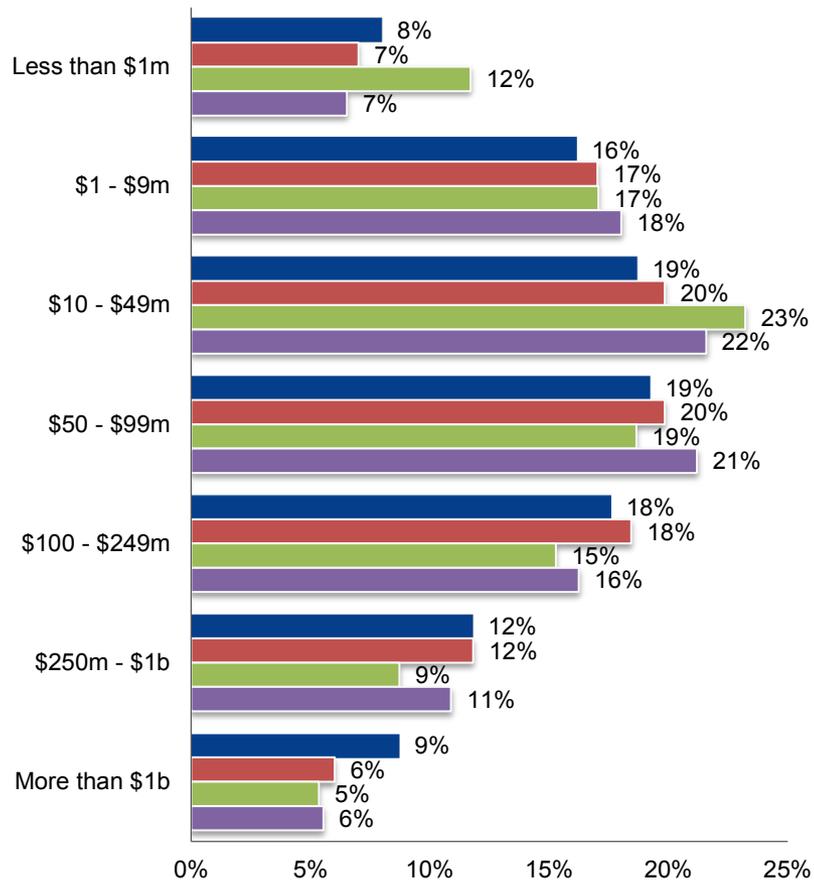
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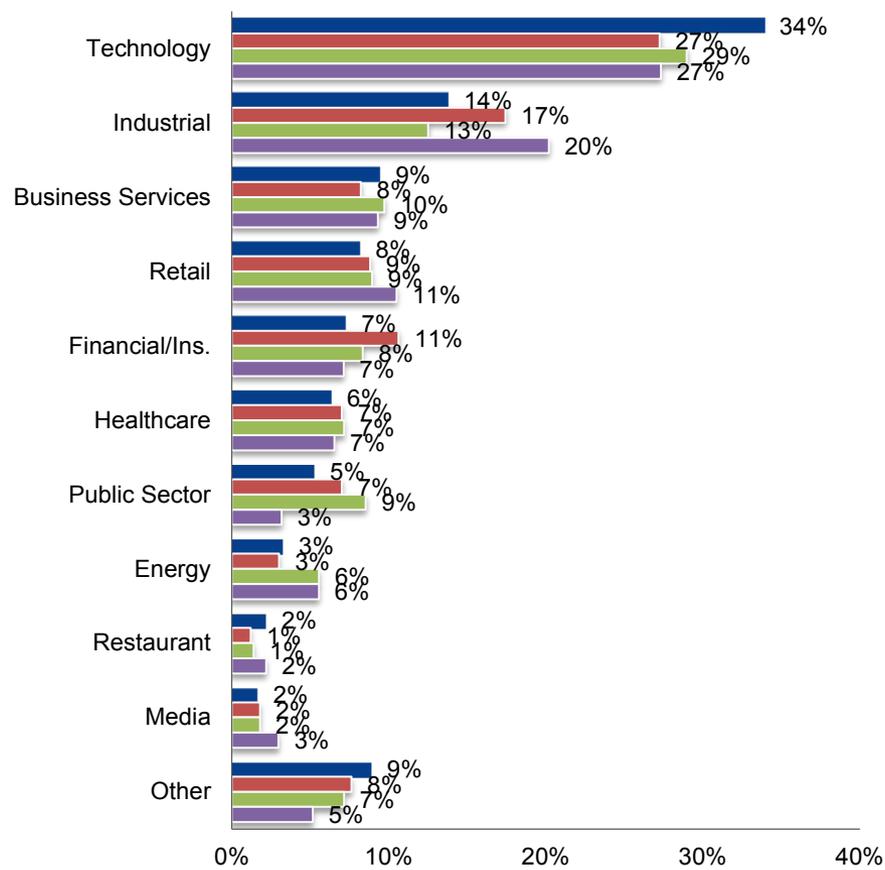
# Global—Demographic Information (Budget Size and Industry)

This survey comprised 552 IT decision makers at companies with 100 or more employees: 209 in the US, 170 in Europe, and 173 in Asia.

Indicate your annual IT budget size.



In which industry do you classify your company?



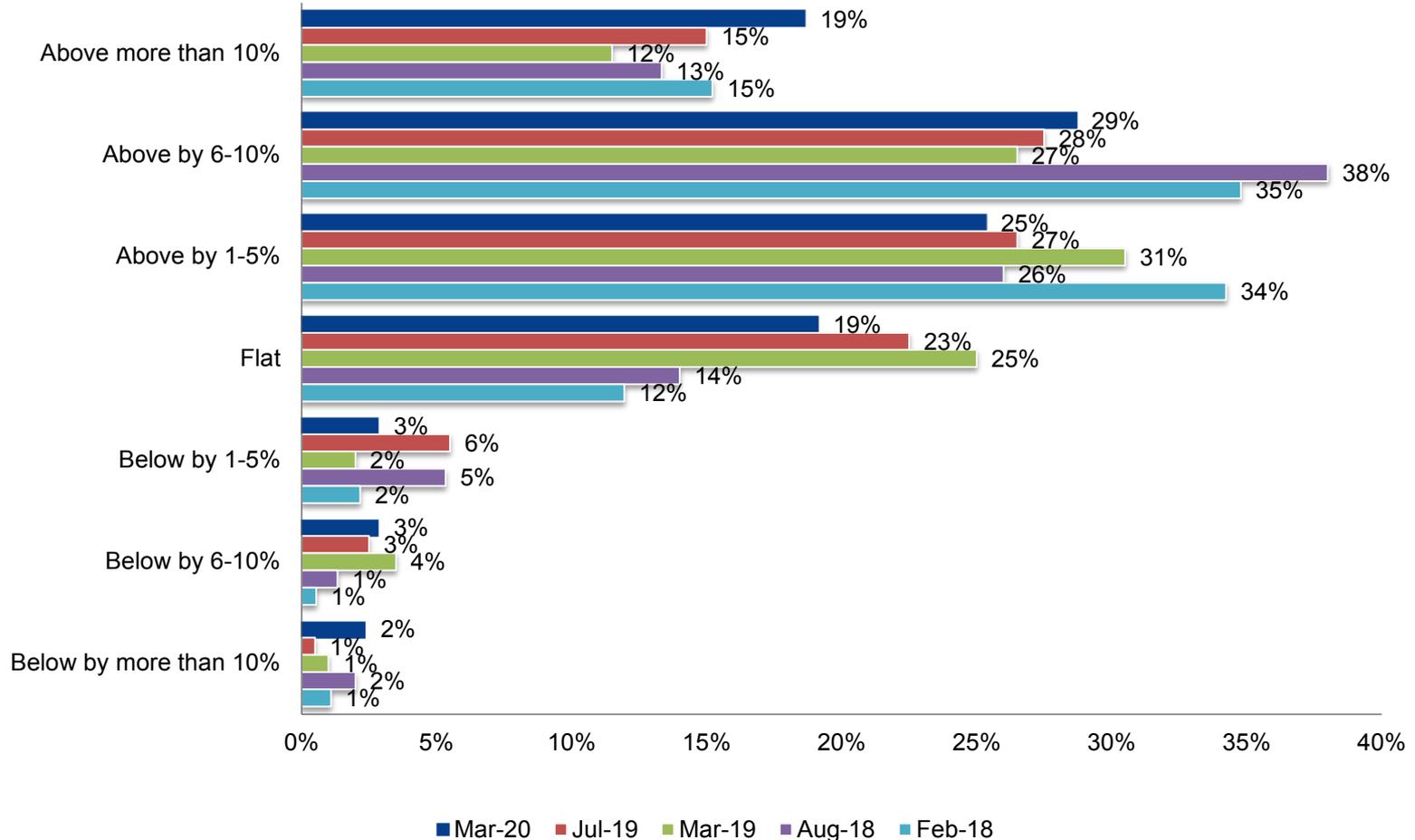
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# US—2020 IT Budget Expectations

48% expect their 2020 IT budget to increase 6% or more vs. their 2019 IT budget, while 25% expect a 1%–5% increase, 19% expect it to remain flat, and 8% expect a 1%–10% decrease.

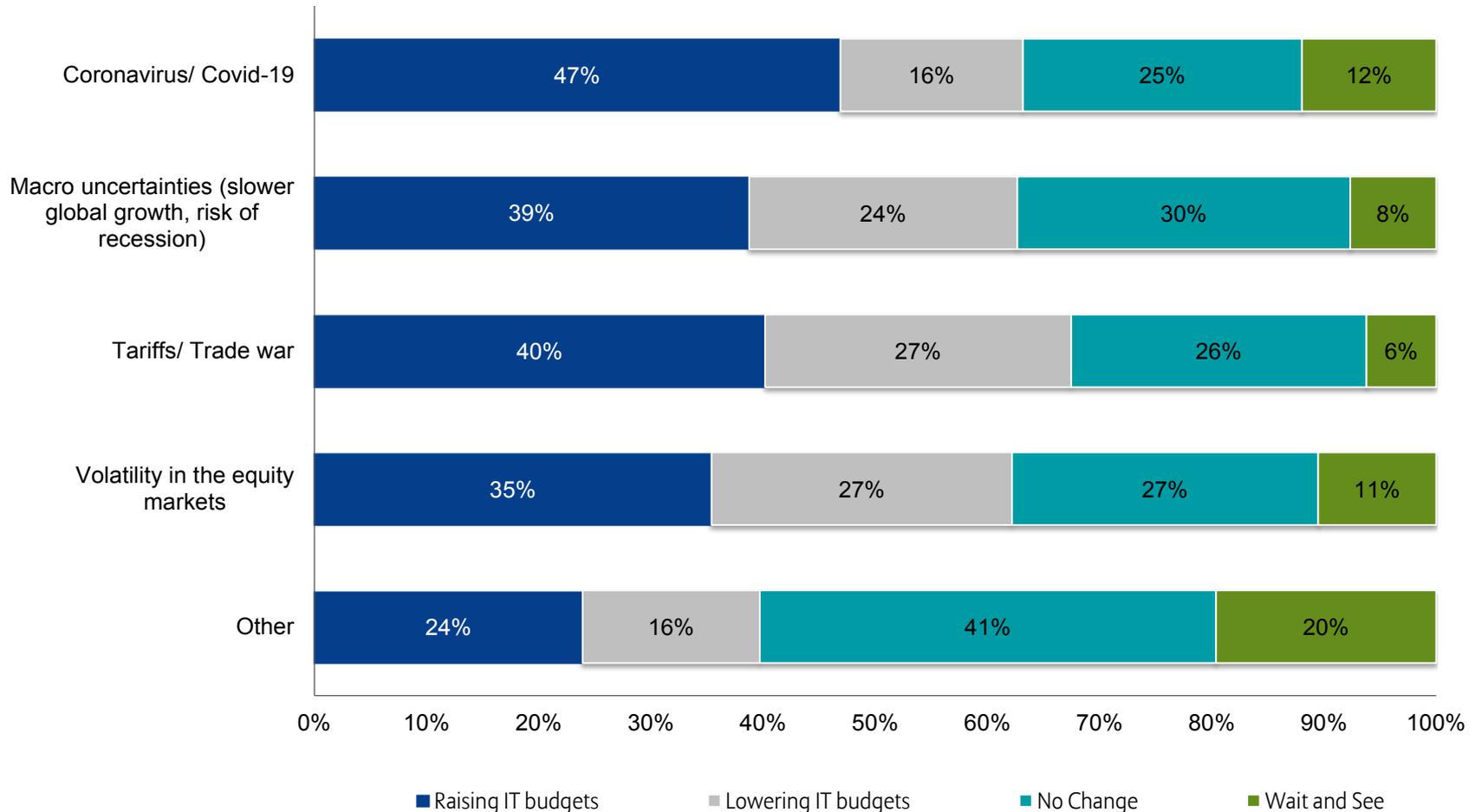
*How do you expect your 2020 IT budget to compare to your 2019 IT budget?*



# US—Impact of Macro Events on 2020 IT Budget

47% said COVID-19 has increased their company's willingness to spend on IT projects for 2020 in the past 90 days, while 16% said it has lowered their IT budget.

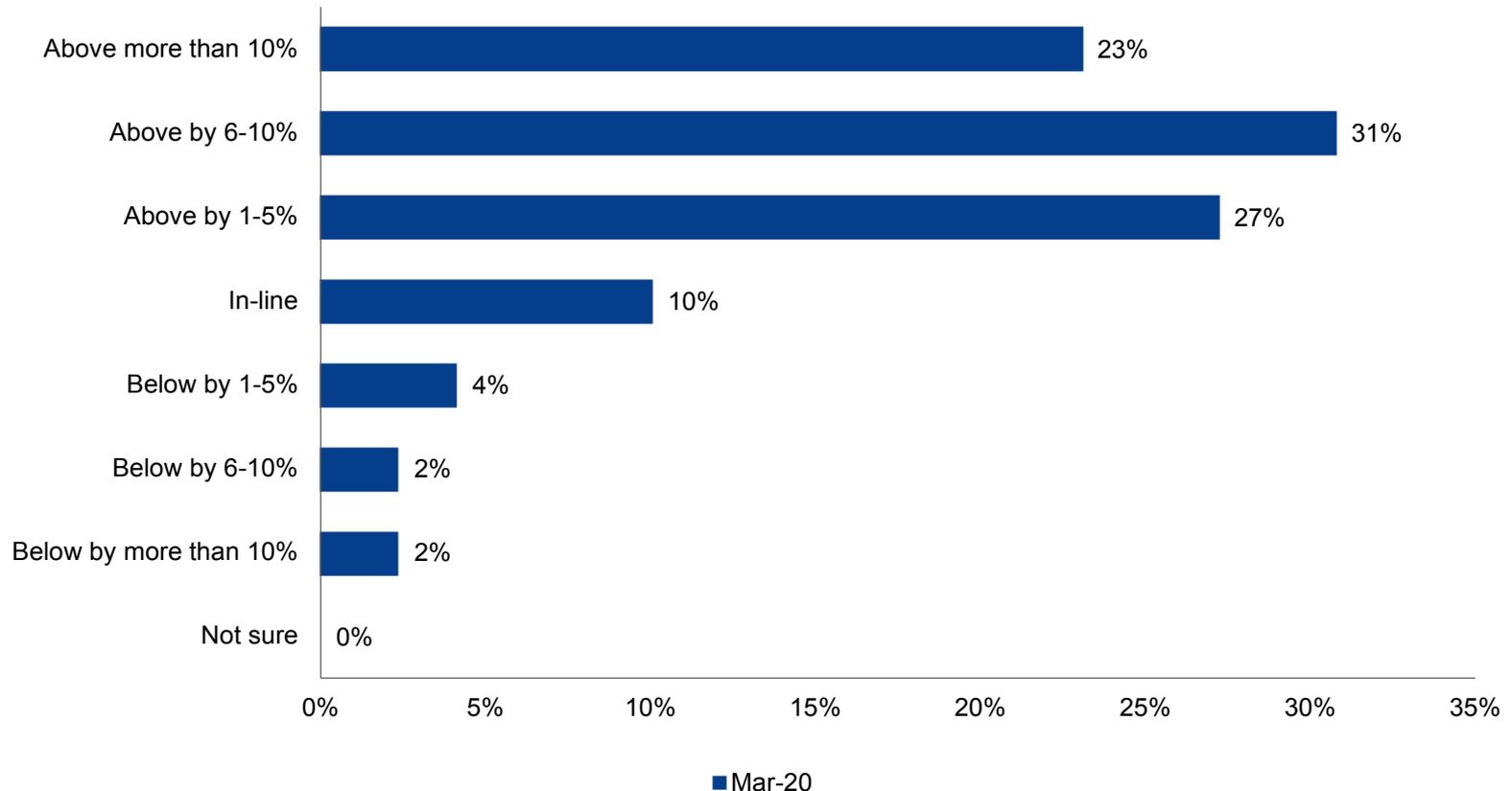
*How have the following affected your company's willingness to spend on IT projects for 2020 in the past 90 days, if at all?*



## US—% Impact of Macro Events on 2020 IT Budget

Among respondents who said macro events have affected their company's willingness to spend on IT projects for 2020 in the past 90 days, 54% said their overall IT budget increased 6% or more in the past 90 days and 27% said 1%–5%, while 10% said it remained flat, and 8% said it decreased 1% or more.

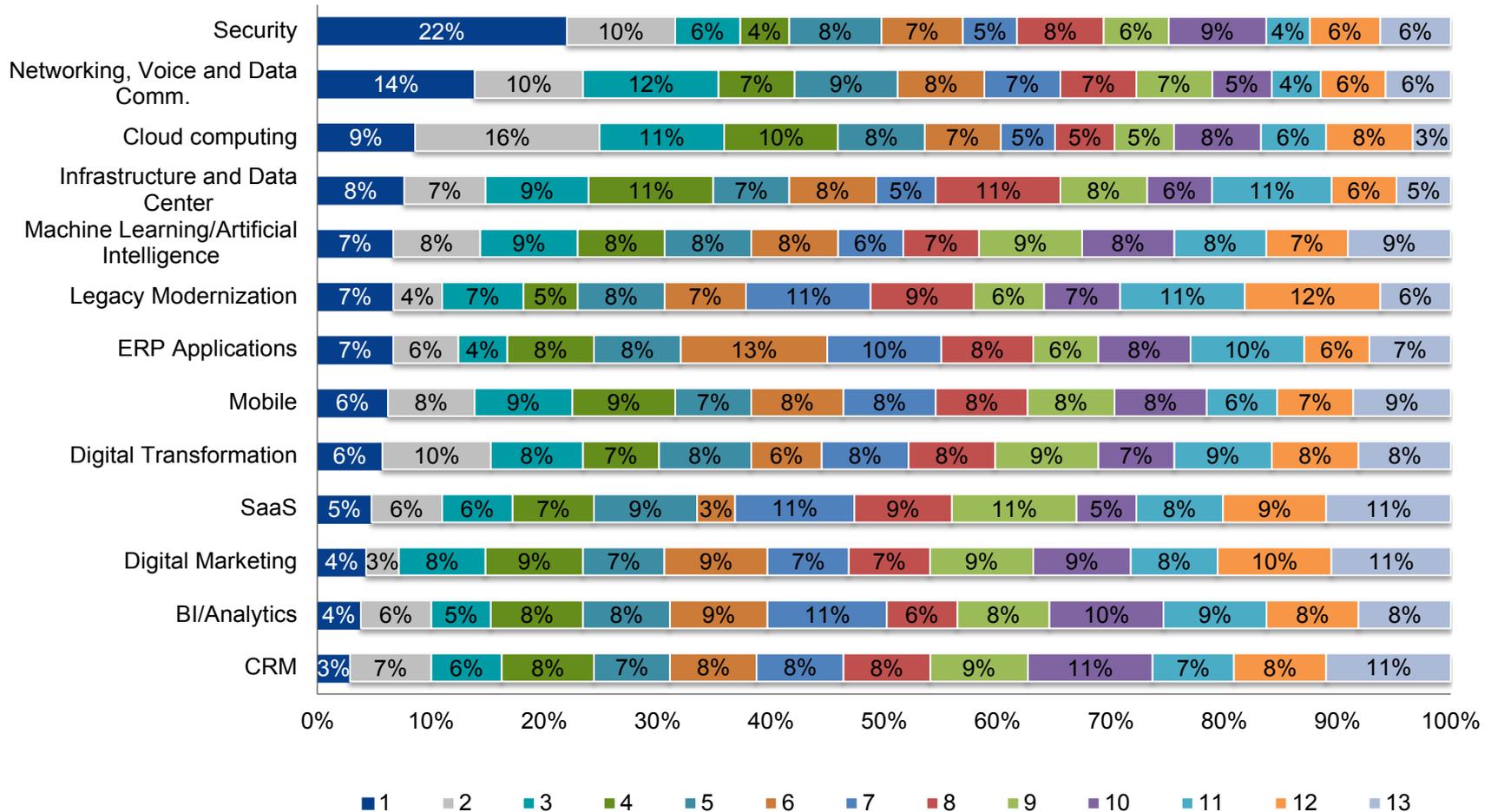
*In the previous question, you indicated that macro events (e.g., tariffs) have affected your company's willingness to spend on IT projects for 2020 in the past 90 days. Can you estimate by how much your overall 2020 IT budget has changed in the past 90 days?*



# US—IT Spending Priorities in 2020

The top IT spending priority in 2020 is security (22%), followed by networking (14%) and cloud computing (9%).

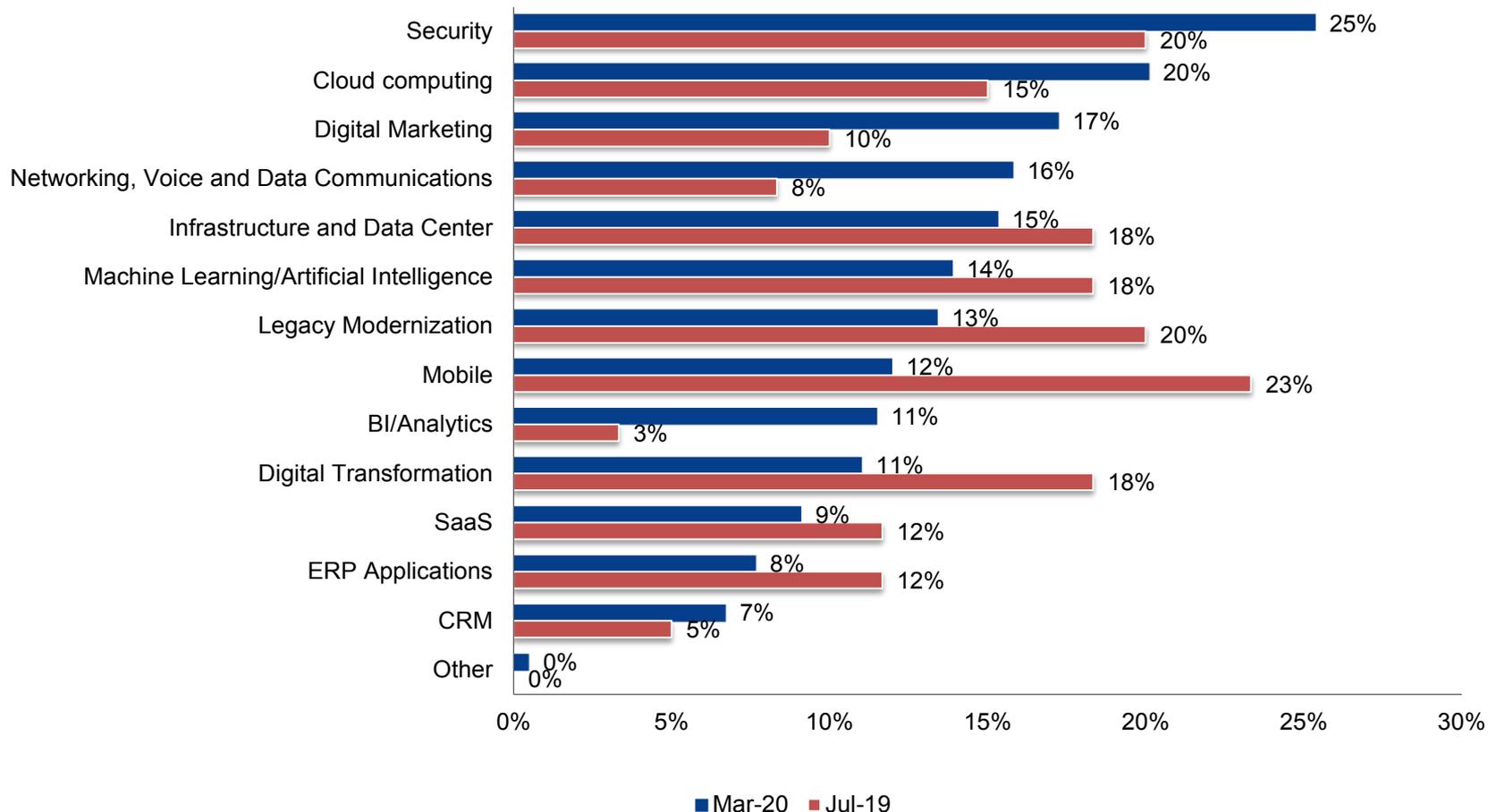
*Please drag and drop the following in order of your top IT spending priorities for 2020, with No. 1 being the most important.*



# US—Categories of Spend Vulnerable to Budget Cuts

In the event of cuts to the IT budget, security, cloud computing, and digital marketing would be affected the most.

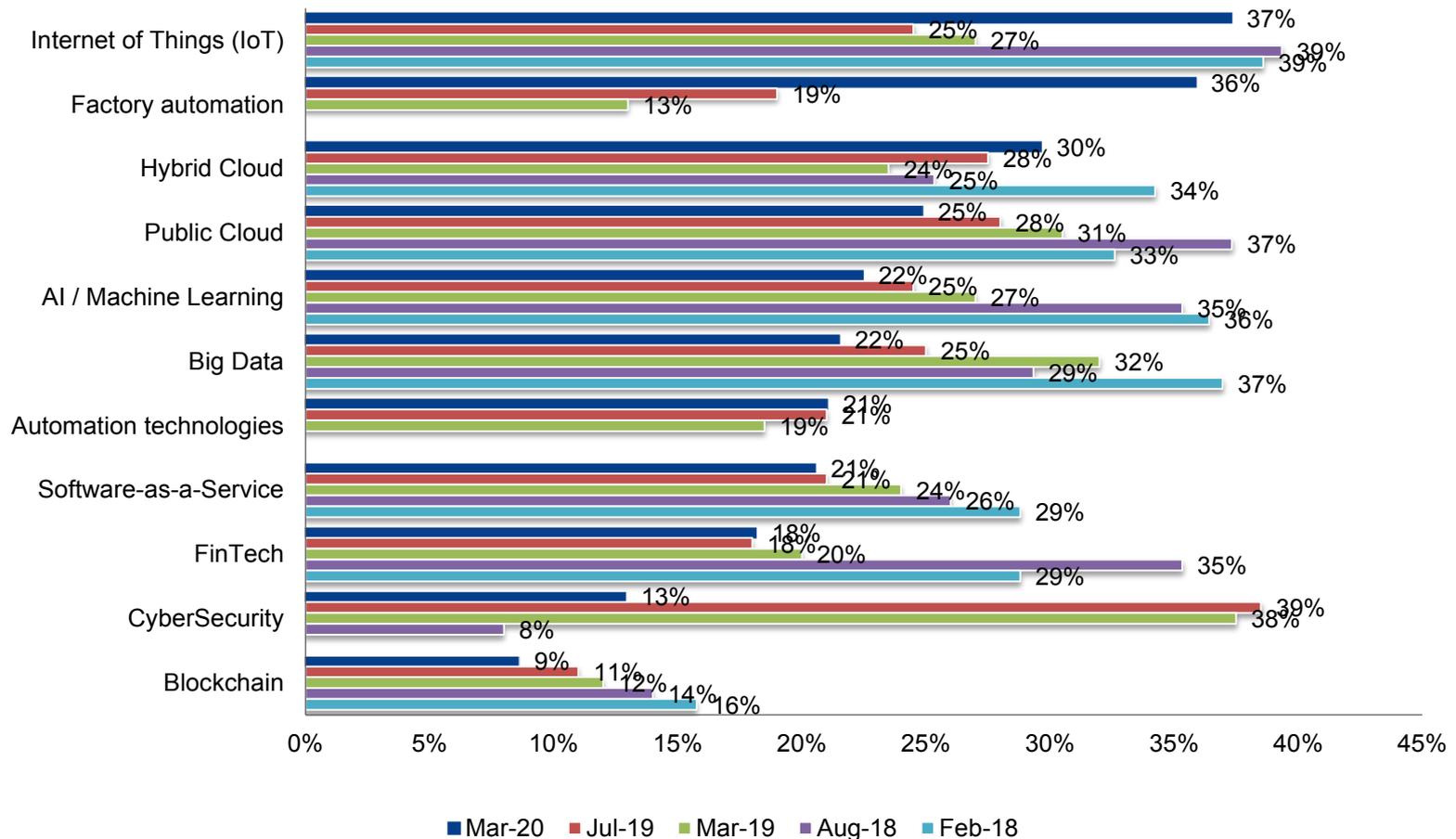
*In the event of cuts to your IT budget, which two broad categories of spending would be affected the most?*



# US—Technology with the Greatest Impact in the Next 5 Years

The technology that respondents expect to have the greatest impact on their companies in the next five years is IoT (37%), followed by factory automation (36%), the hybrid cloud (30%), and the public cloud (25%).

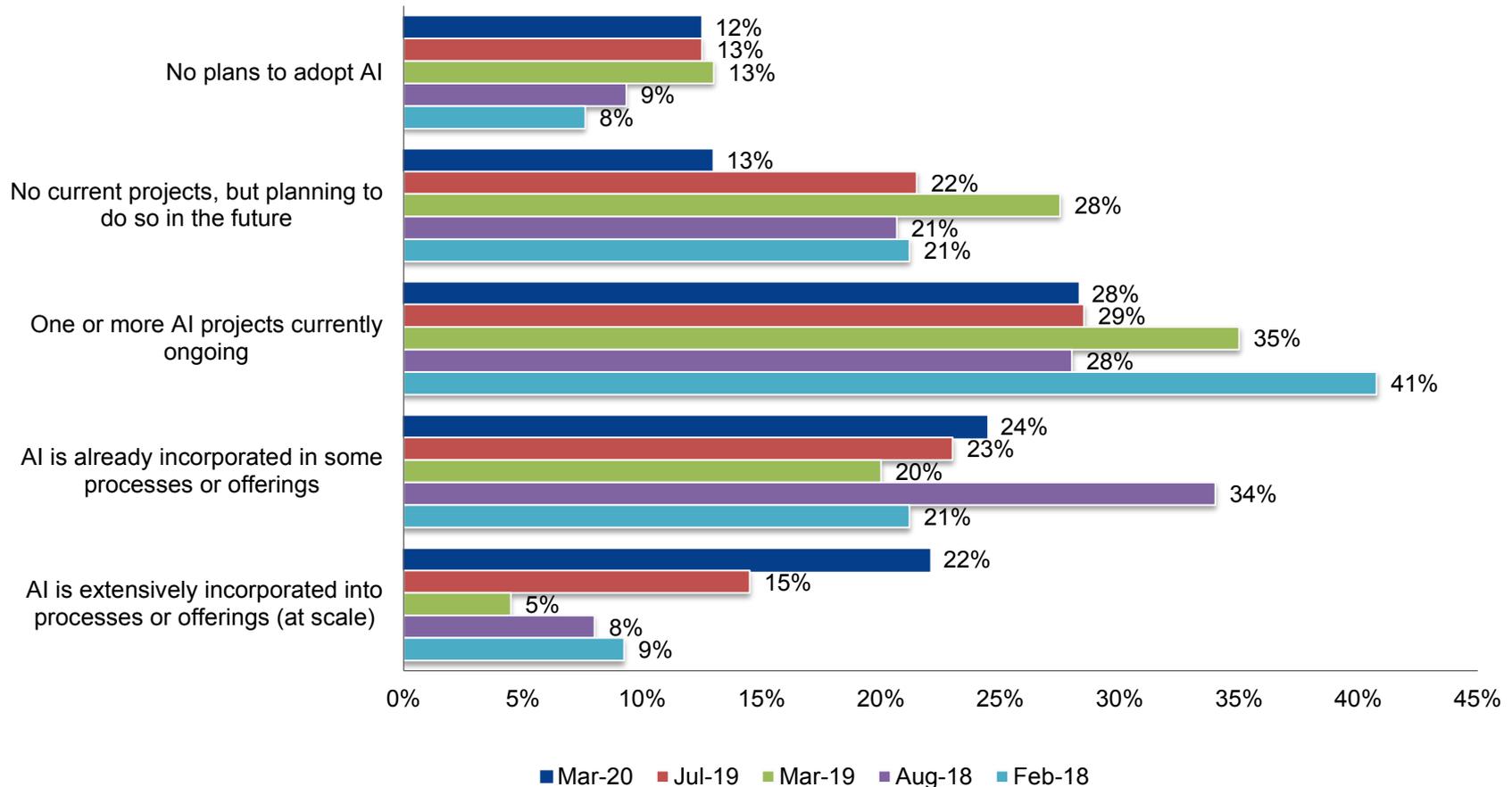
*Which technology do you expect to have the greatest impact on your company in the next five years? (Choose up to three.)*



# US—AI Adoption

28% have one or more ongoing AI projects currently, while 24% said AI is already incorporated in some processes or offerings, 22% said AI is extensively incorporated in their organization, 22% said AI is already incorporated in some processes or offerings, 22% said AI is extensively incorporated in their organization, and 13% have none but plan to in the future. 12% have no plans to adopt AI. 12% have no plans to adopt AI.

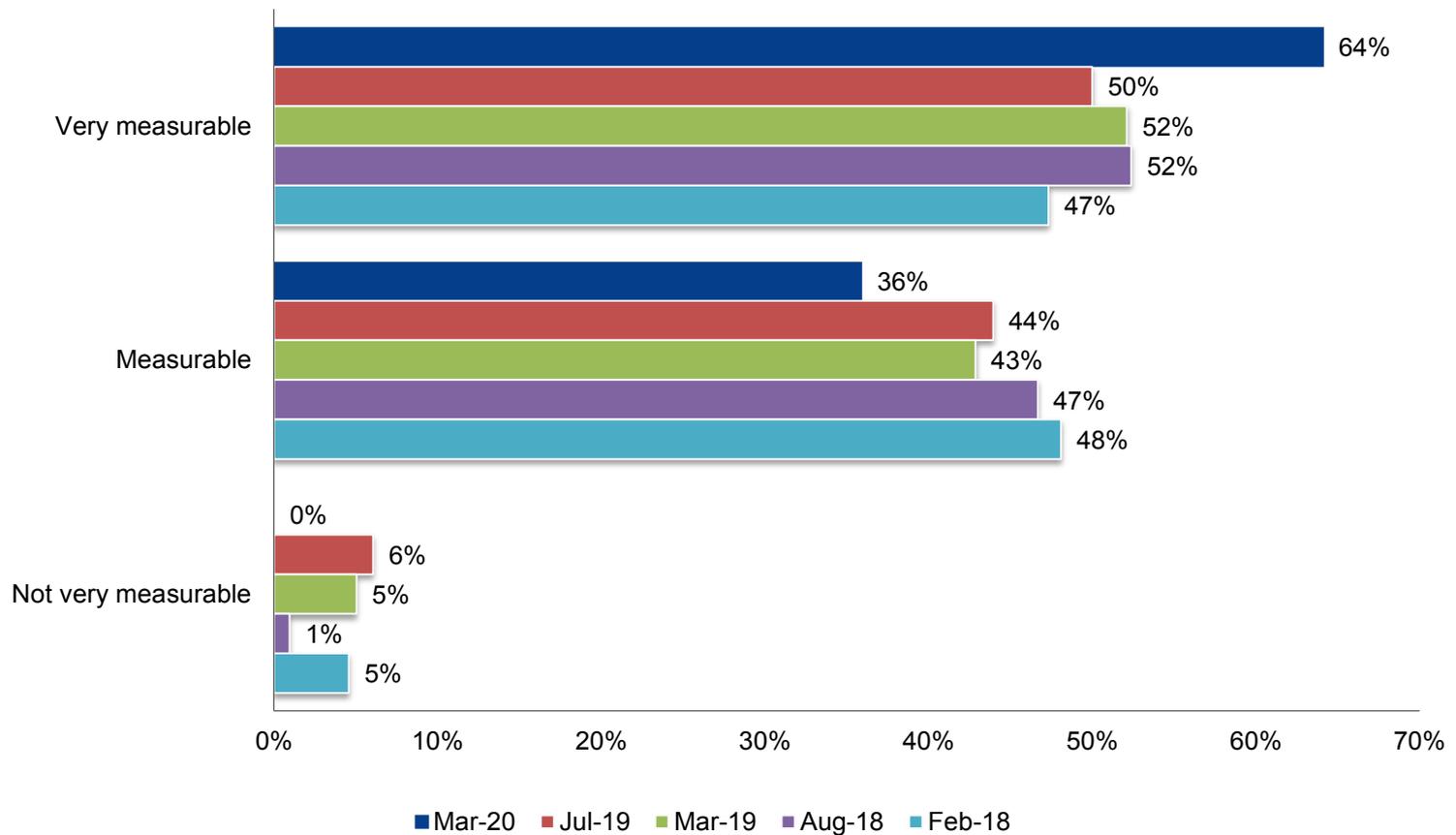
*What is the level of AI adoption in your organization?*



# US—Measurability of Results from Big Data and AI

Among respondents who have one or more ongoing AI projects currently, 100% said results from big data and AI are measurable or very measurable.

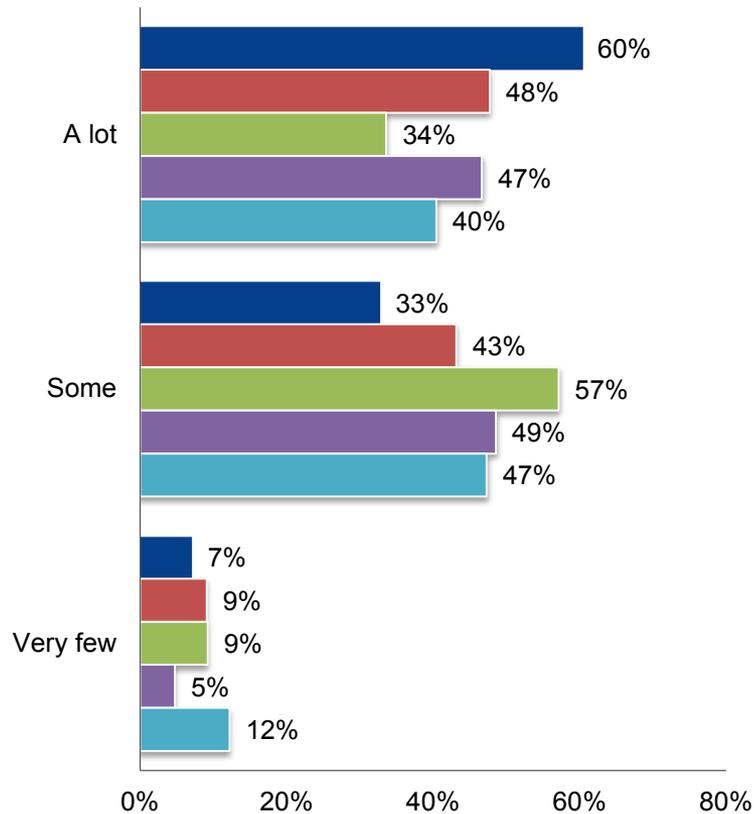
*Do you see measurable results from big data and AI?*



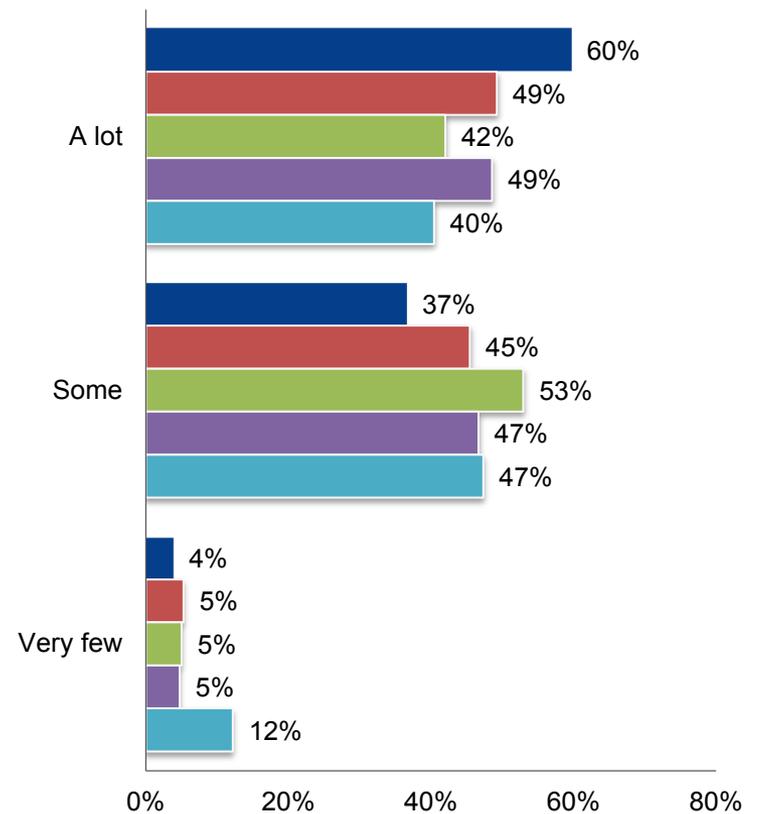
# US—No. of AI Projects Underway or Expected

Among respondents who have one or more ongoing AI projects currently, 93% started at least some last year, and 97% plan to start at least some this year.

*How many AI projects did your company start **last year**?*



*How many AI projects do you expect your company to start **this year**?*



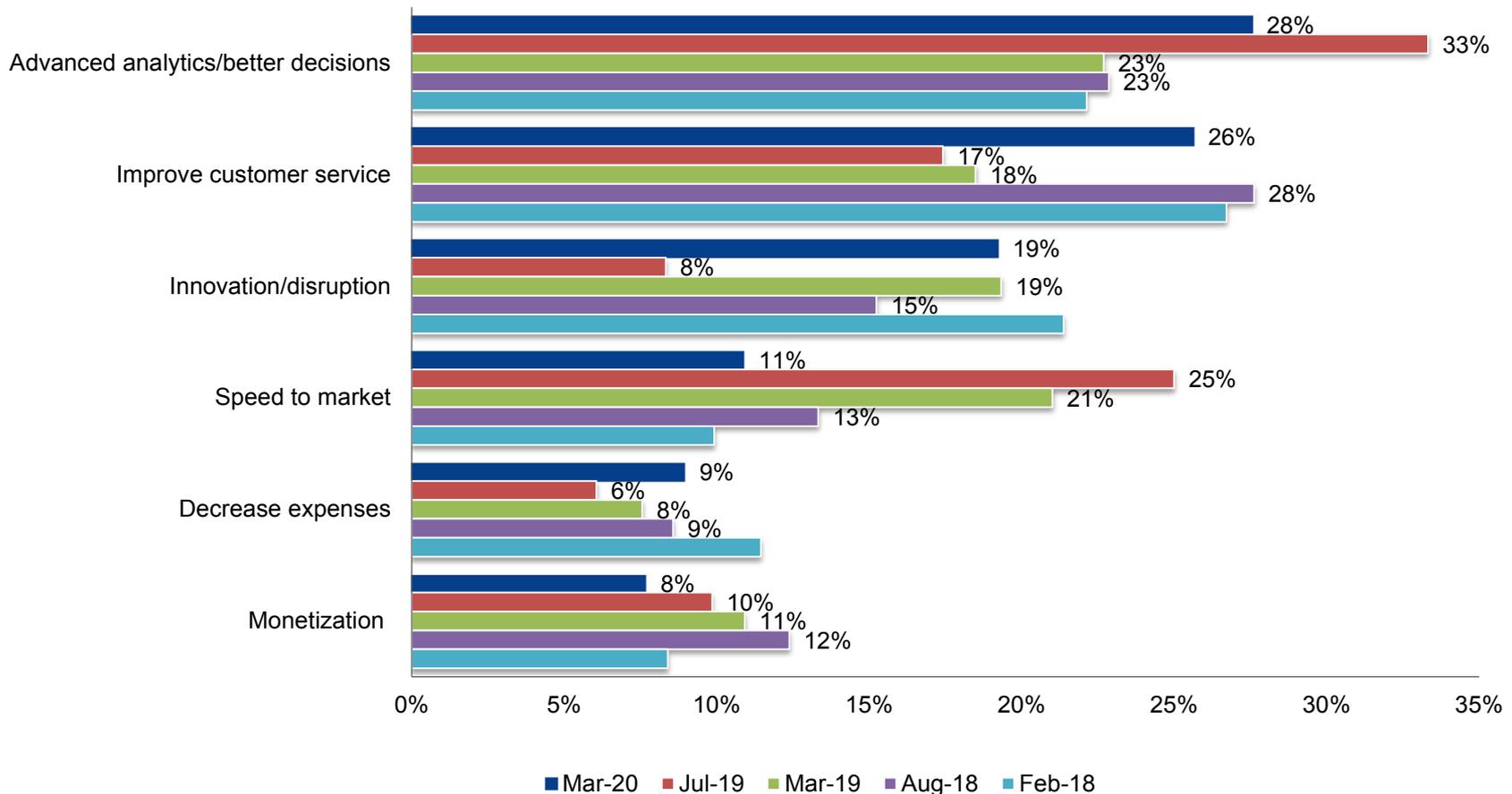
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# US—Top Objective of AI Investment

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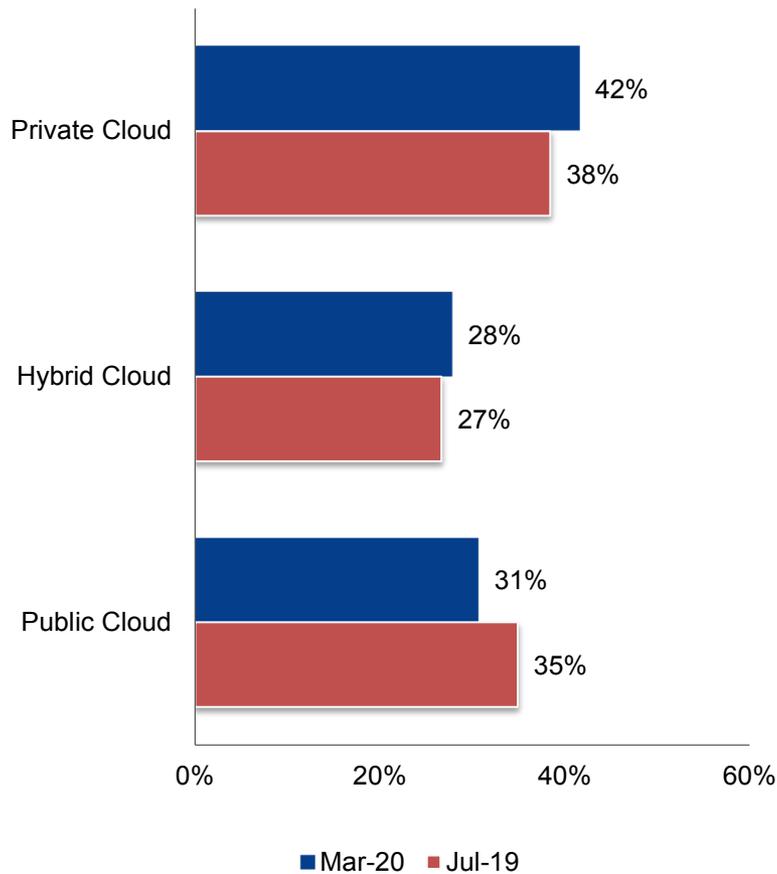
*What is the top objective of AI investment? (Choose one.)*



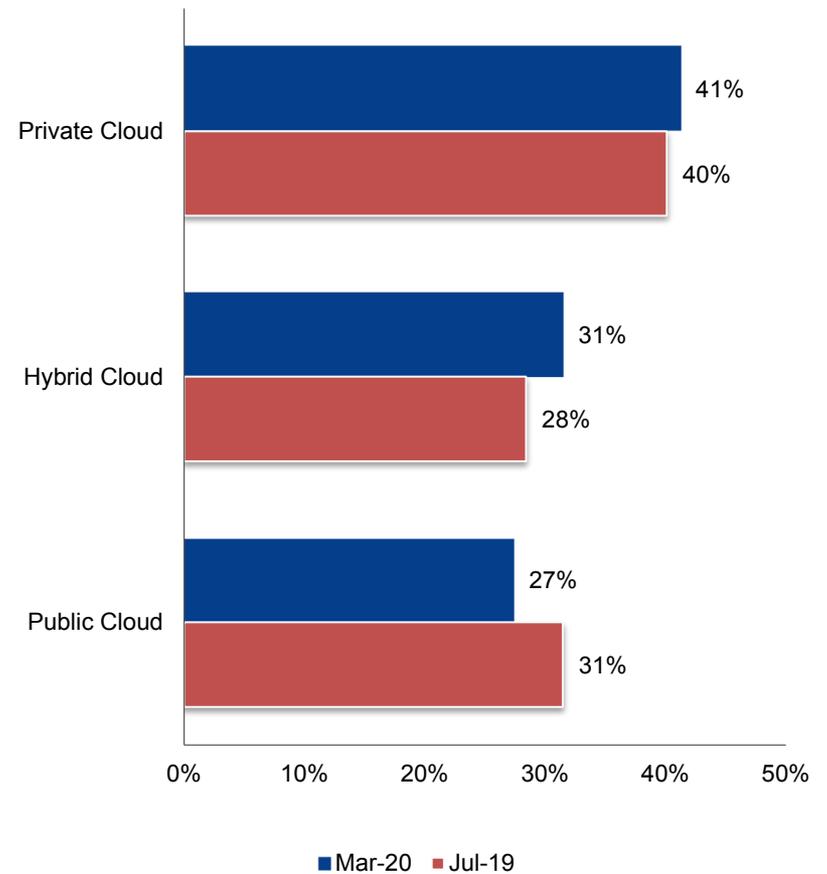
# US—Cloud Mix

The current mix of cloud workloads is 42% private, 31% public, and 28% hybrid. The expected mix in five years is 41% private, 27% public, and 31% hybrid.

*What is your current mix of private, hybrid, and public cloud workloads?*



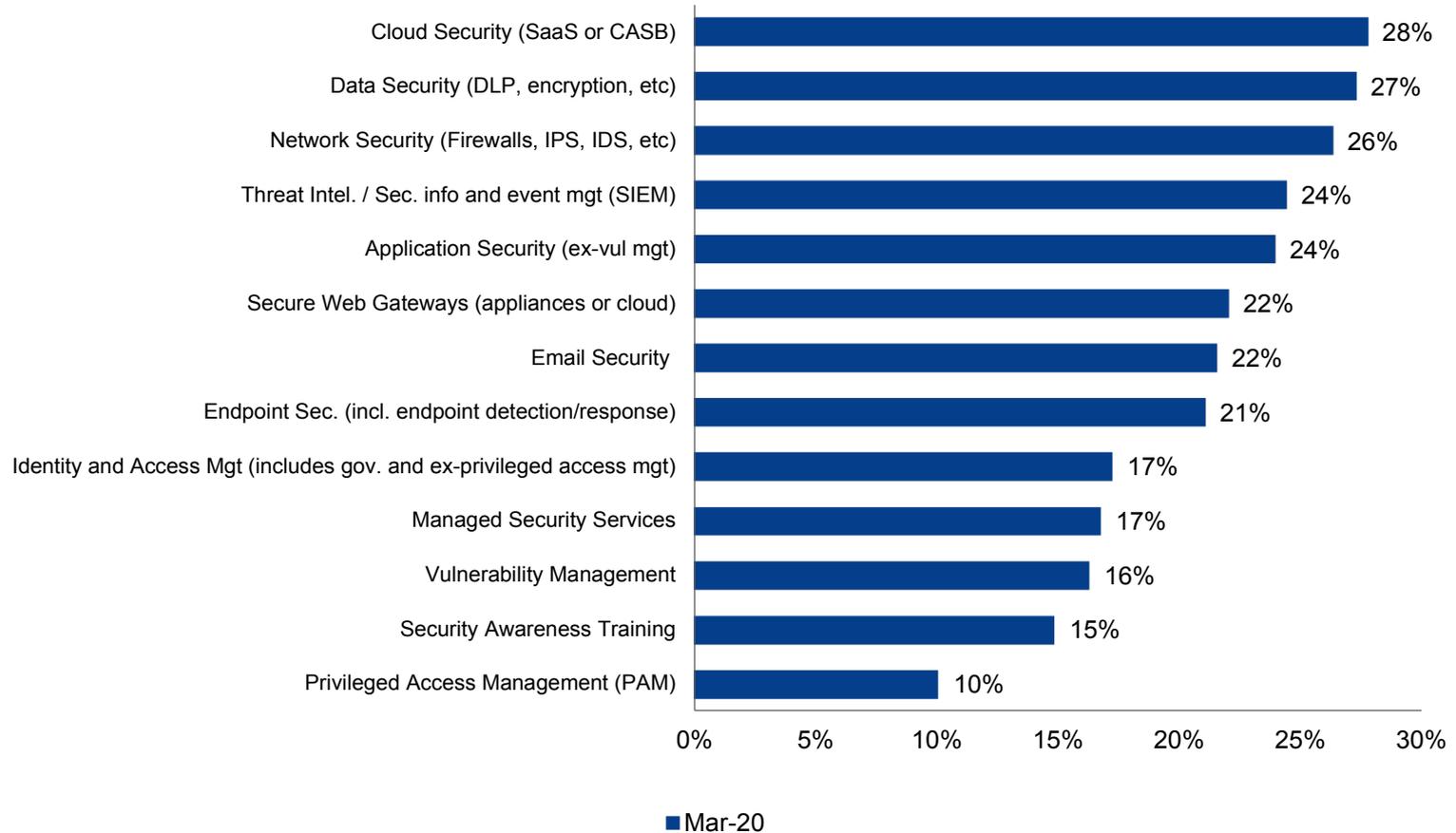
*What do you think your mix will be in five years of private, hybrid, and public cloud workloads?*



# US—Security Priorities

The top security priority in 2020 is cloud security (28%), followed by data security (27%) and network security (26%).

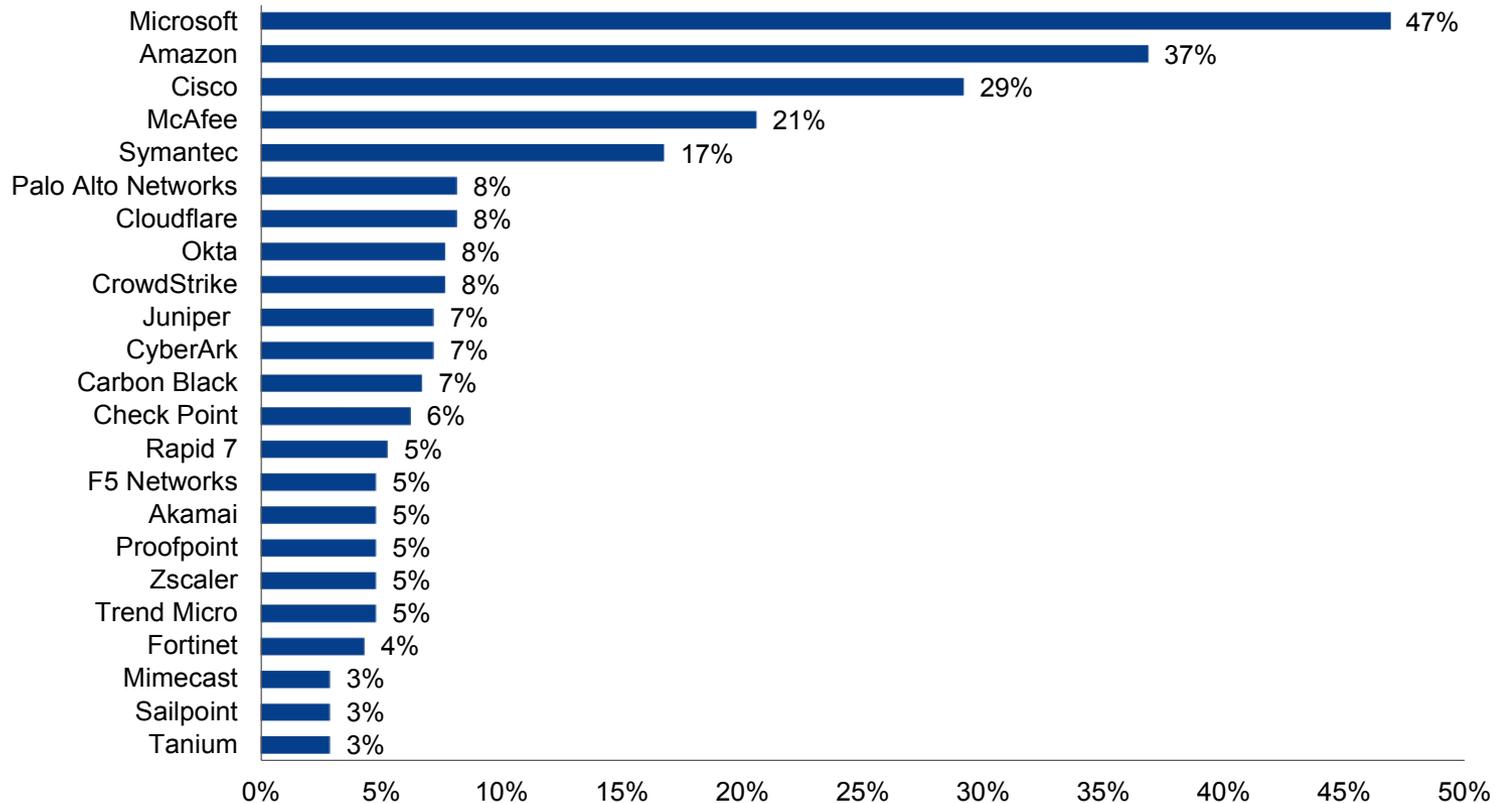
*Which areas of security are your organization's top priorities in terms of spending in the next 12 months (2020)? (Select the top three.)*



# US—Security Vendors

The top security vendor that respondents plan the largest percentage spending increase with in 2020 vs. 2019 is Microsoft (47%), followed by Amazon (37%) and Cisco (29%).

*Choose the top security vendors that you plan the largest percentage spend increase in 2020 vs. 2019. (Select up to three.)*

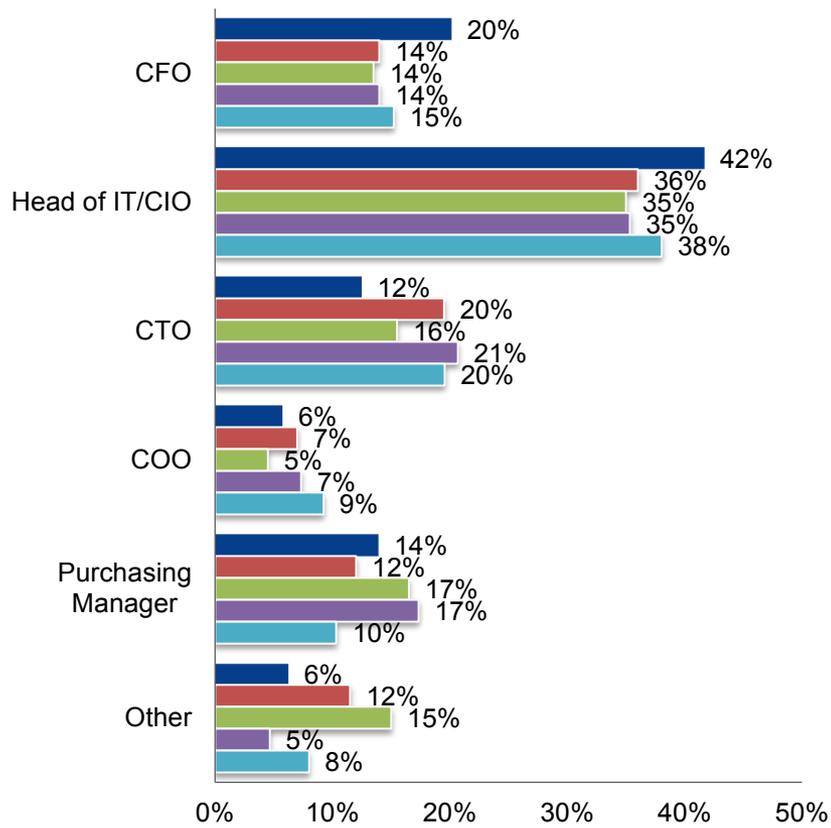


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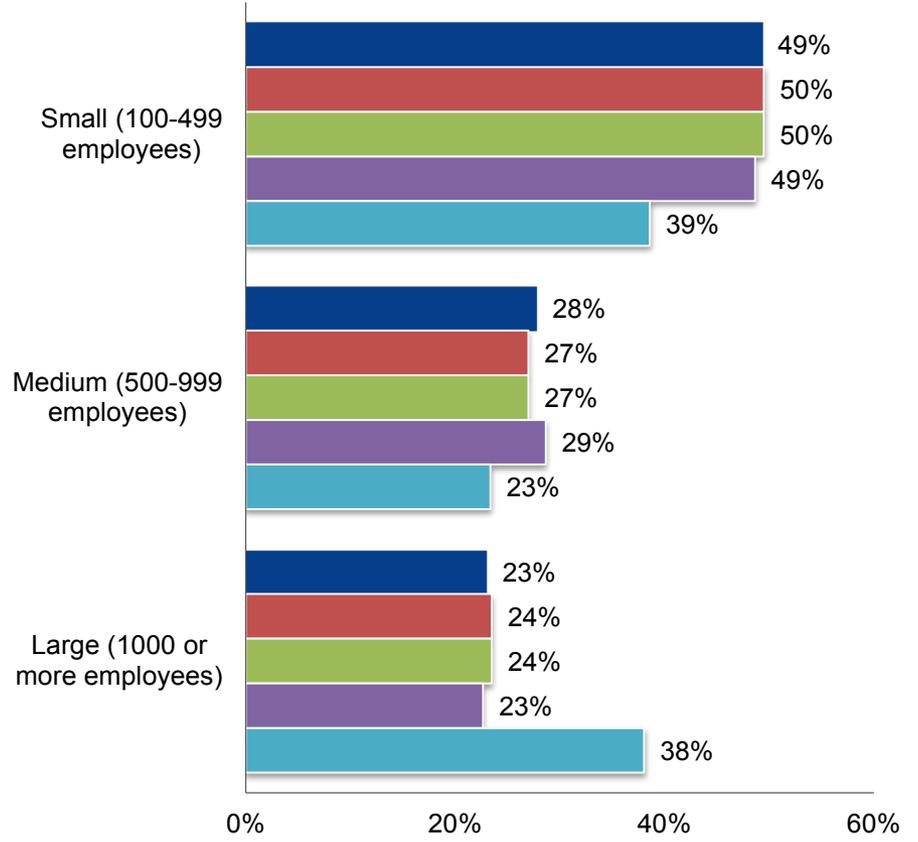
# US—Demographic Information (Role with Company and No. of Employees)

This survey comprised 209 IT decision makers at companies with 100 or more employees in the US.

*What is your role with the company?*



*How many total employees are there at your company?*



■ Mar-20 ■ Jul-19 ■ Mar-19 ■ Aug-18 ■ Feb-18

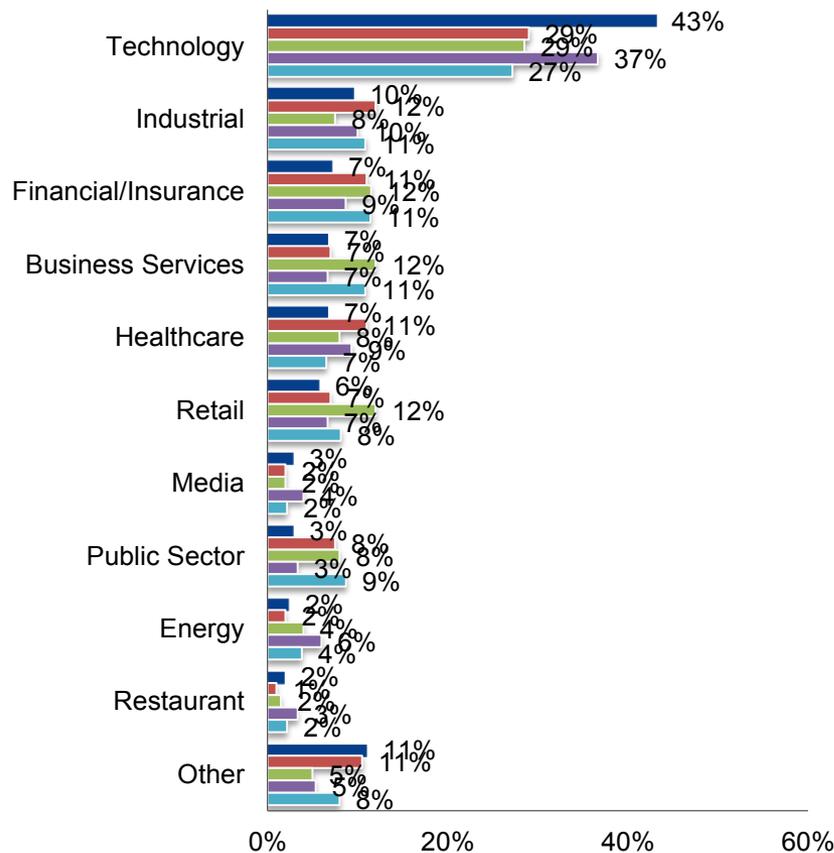
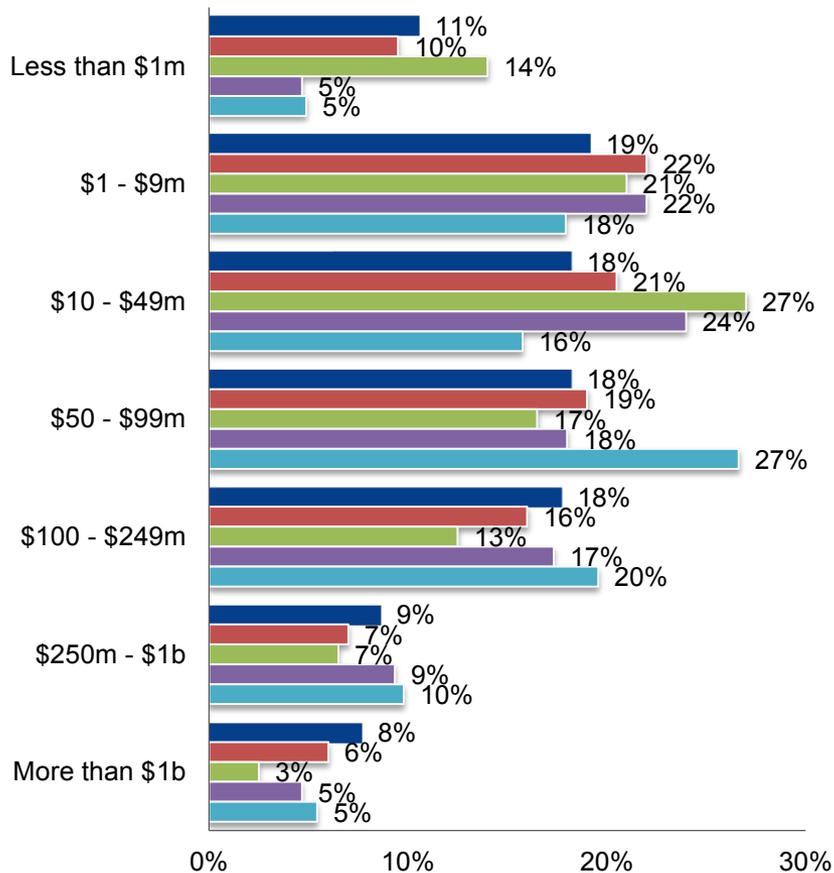
■ Mar-20 ■ Jul-19 ■ Mar-19 ■ Aug-18 ■ Feb-18

# US—Demographic Information (Budget Size and Industry)

This survey comprised 209 IT decision makers at companies with 100 or more employees in the US.

Indicate your annual IT budget size.

In which industry do you classify your company?



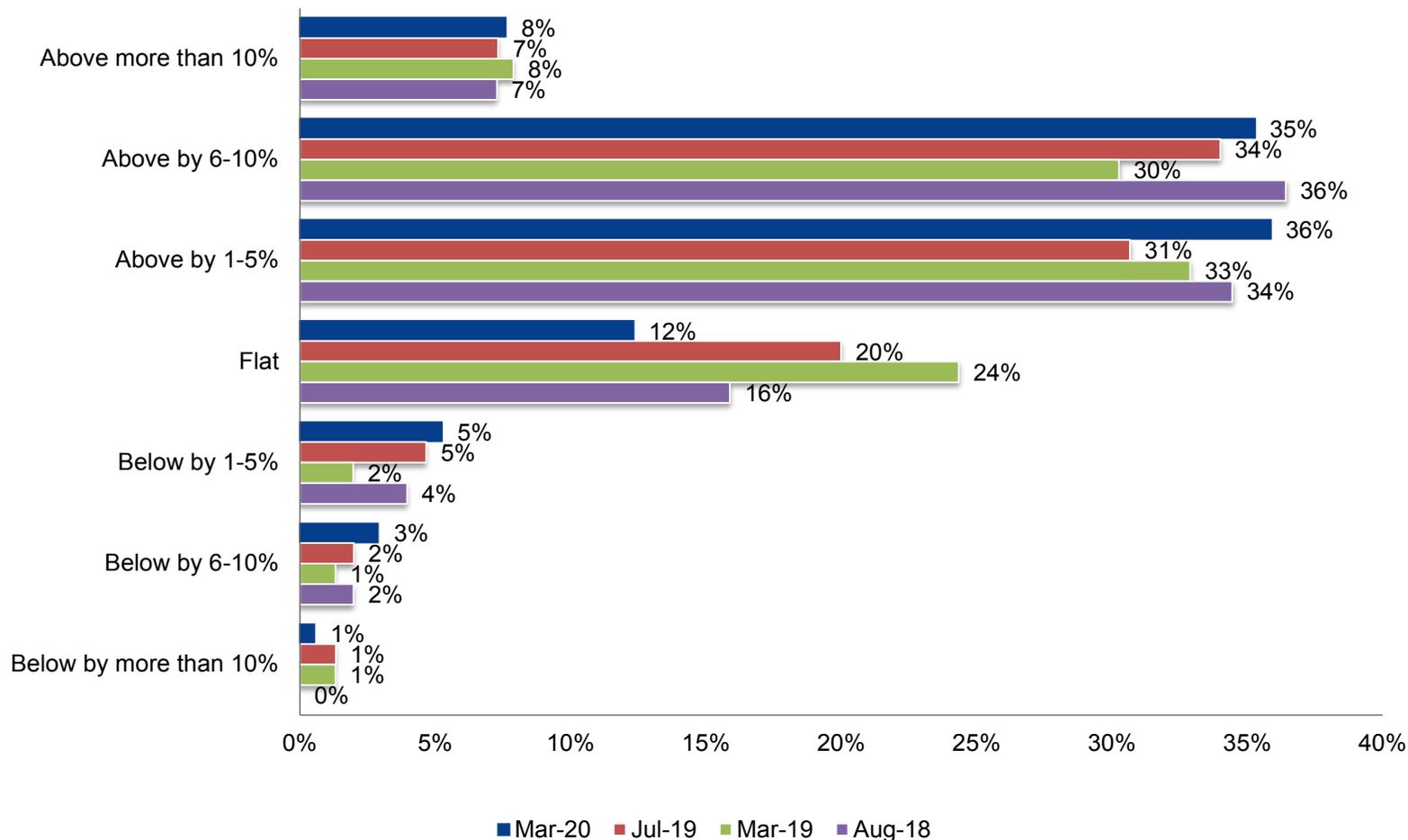
■ Mar-20 ■ Jul-19 ■ Mar-19 ■ Aug-18 ■ Feb-18

■ Mar-20 ■ Jul-19 ■ Mar-19 ■ Aug-18 ■ Feb-18

# Europe—2020 IT Budget Expectations

43% expect their 2020 IT budget to increase 6% or more vs. their 2019 IT budget, while 36% expect a 1%–5% increase, 12% expect it to remain flat, and 9% expect a 1%–10% decrease.

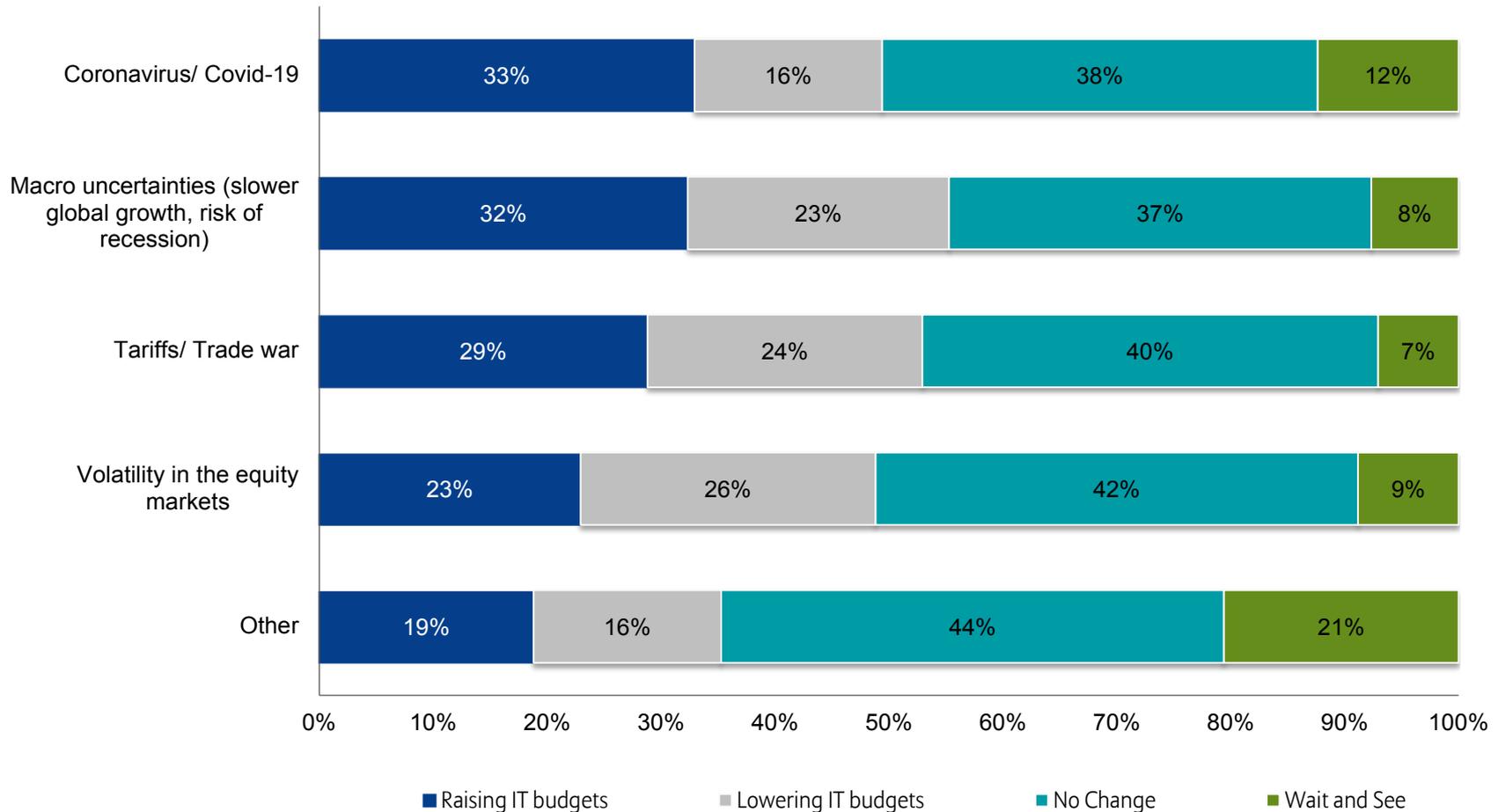
*How do you expect your 2020 IT budget to compare to your 2019 IT budget?*



# Europe—Impact of Macro Events on 2020 IT Budget

33% said COVID-19 has increased their company's willingness to spend on IT projects for 2020 in the past 90 days, while 16% said it has lowered their IT budget.

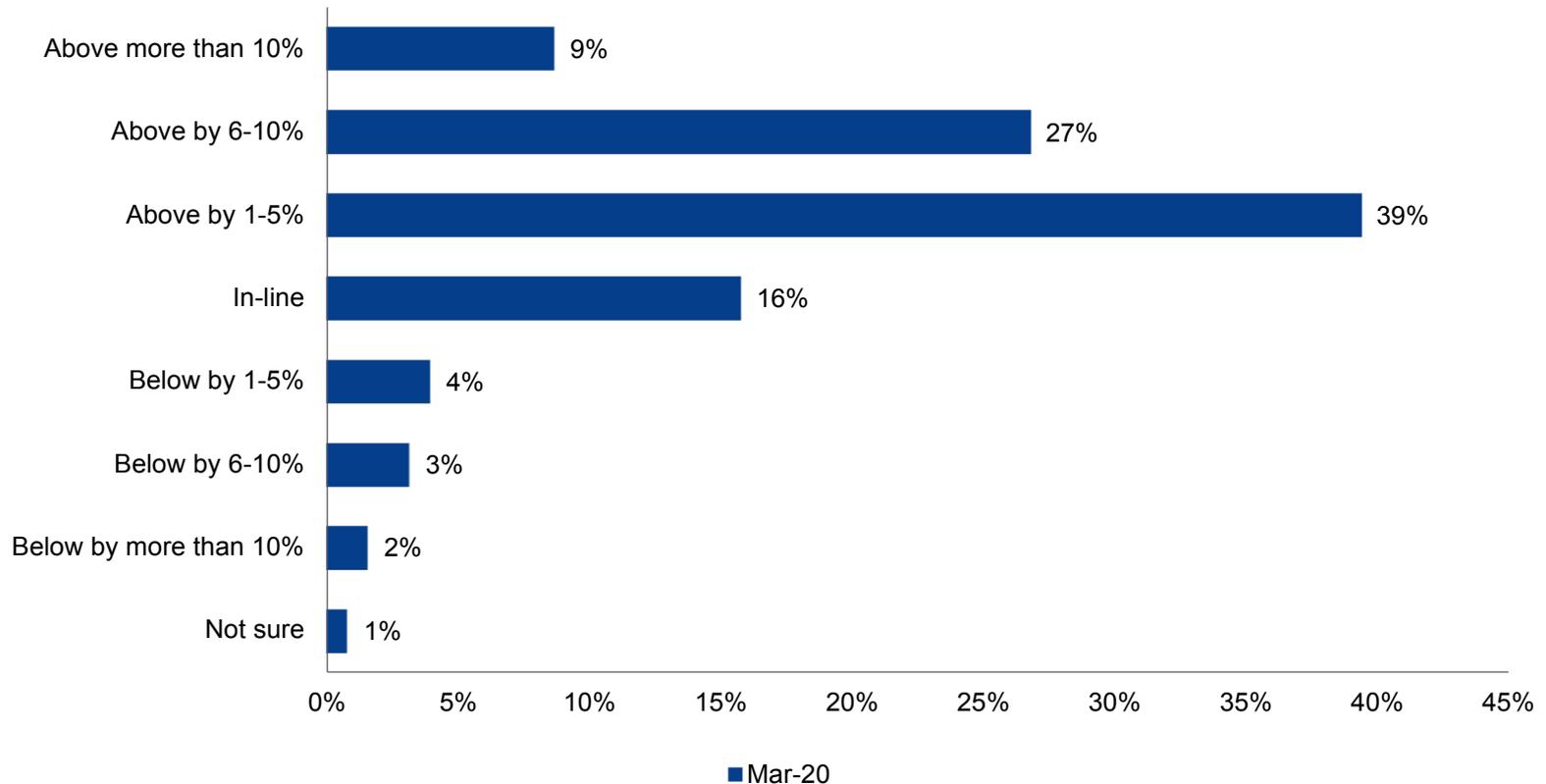
*How have the following affected your company's willingness to spend on IT projects for 2020 in the past 90 days, if at all?*



## Europe—% Impact of Macro Events on 2020 IT Budget

Among respondents who said macro events have affected their company's willingness to spend on IT projects for 2020 in the past 90 days, 39% said their overall IT budget increased 1%–5% in the past 90 days and 36% said 6% or more, while 16% said it remained flat, and 10% said it decreased 1% or more.

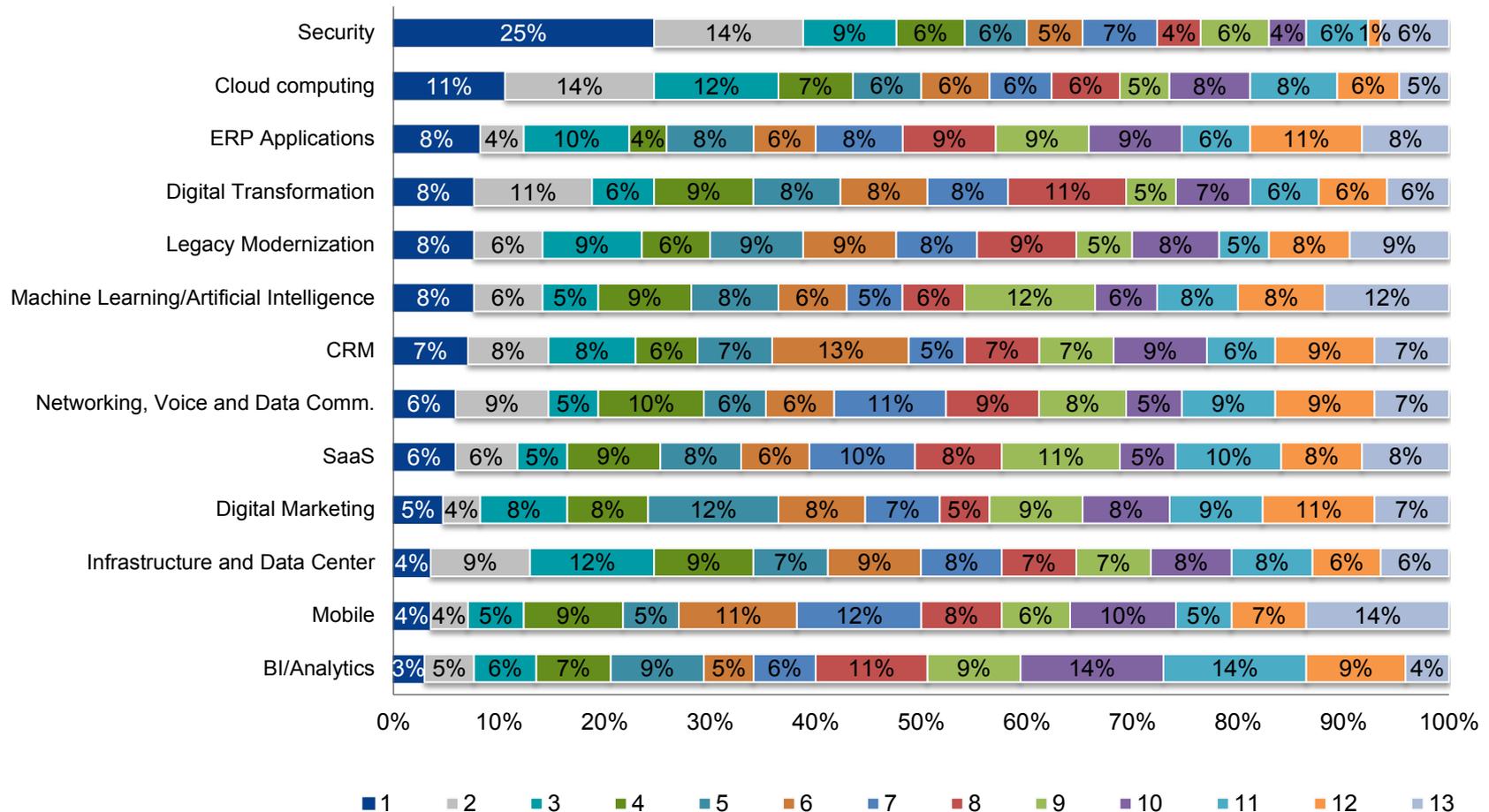
*In the previous question, you indicated that macro events (e.g., tariffs) have affected your company's willingness to spend on IT projects for 2020 in the past 90 days. Can you estimate by how much your overall 2020 IT budget has changed in the past 90 days?*



# Europe—IT Spending Priorities in 2020

The top IT spending priority in 2020 is security (25%), followed by cloud computing (11%).

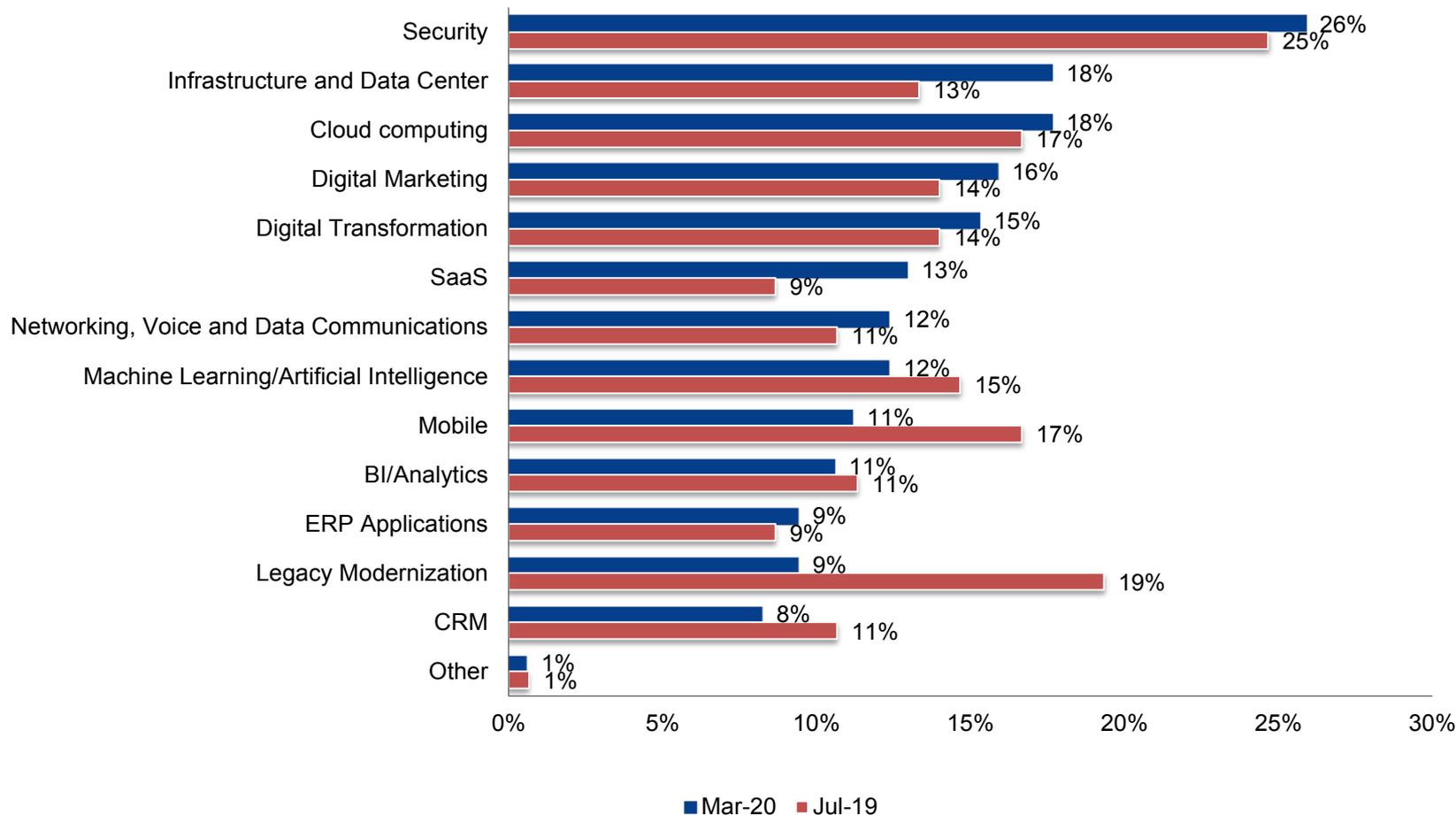
*Please drag and drop the following in order of your top IT spending priorities for 2020, with No. 1 being the most important.*



# Europe—Categories of Spend Vulnerable to Budget Cuts

In the event of cuts to the IT budget, security, infrastructure/data center, and cloud computing would be affected the most.

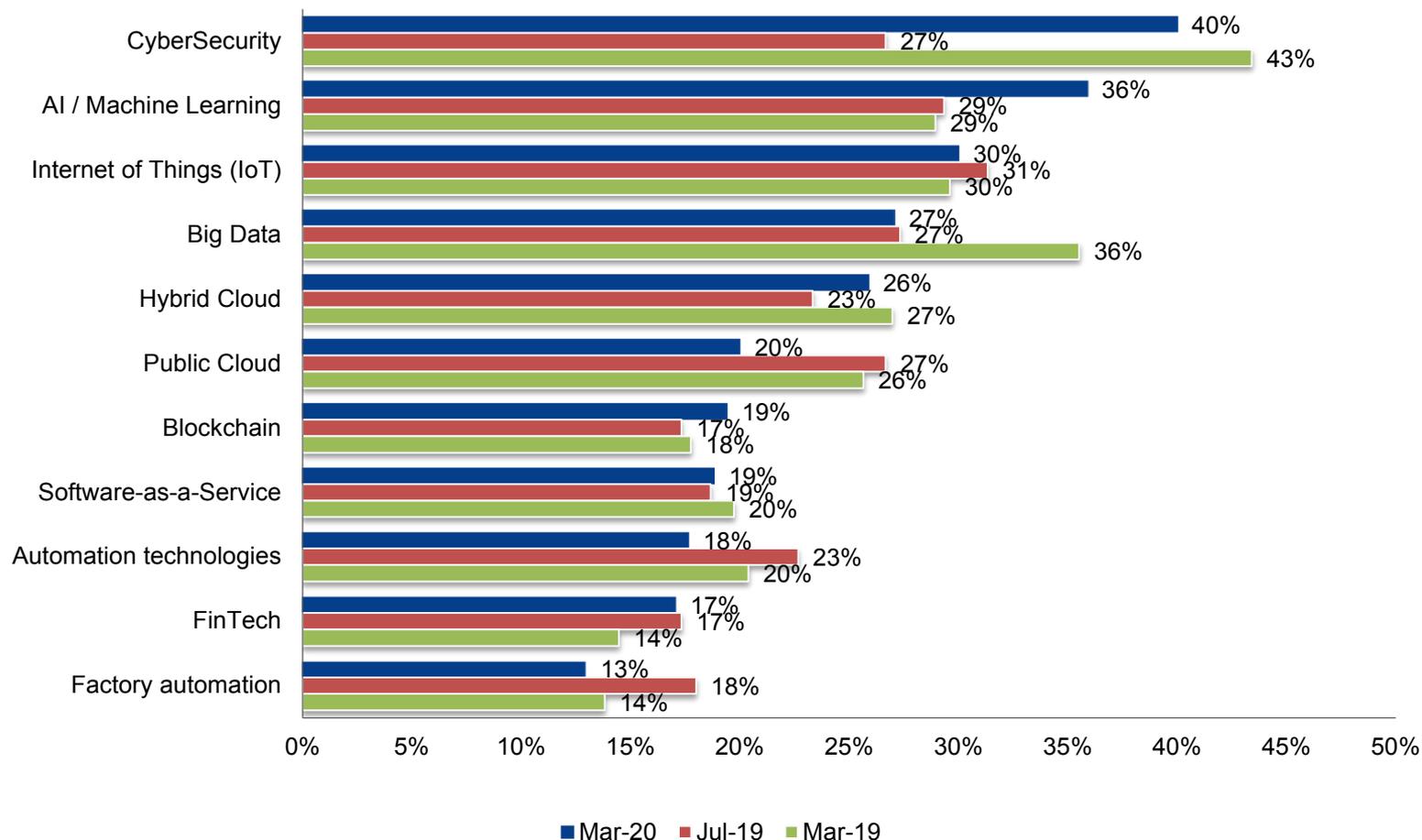
*In the event of cuts to your IT budget, which two broad categories of spending would be affected the most?*



# Europe—Technology with the Greatest Impact in the Next 5 Years

The technology that respondents expect to have the greatest impact on their companies in the next five years is cybersecurity (40%), followed by AI/machine learning (36%).

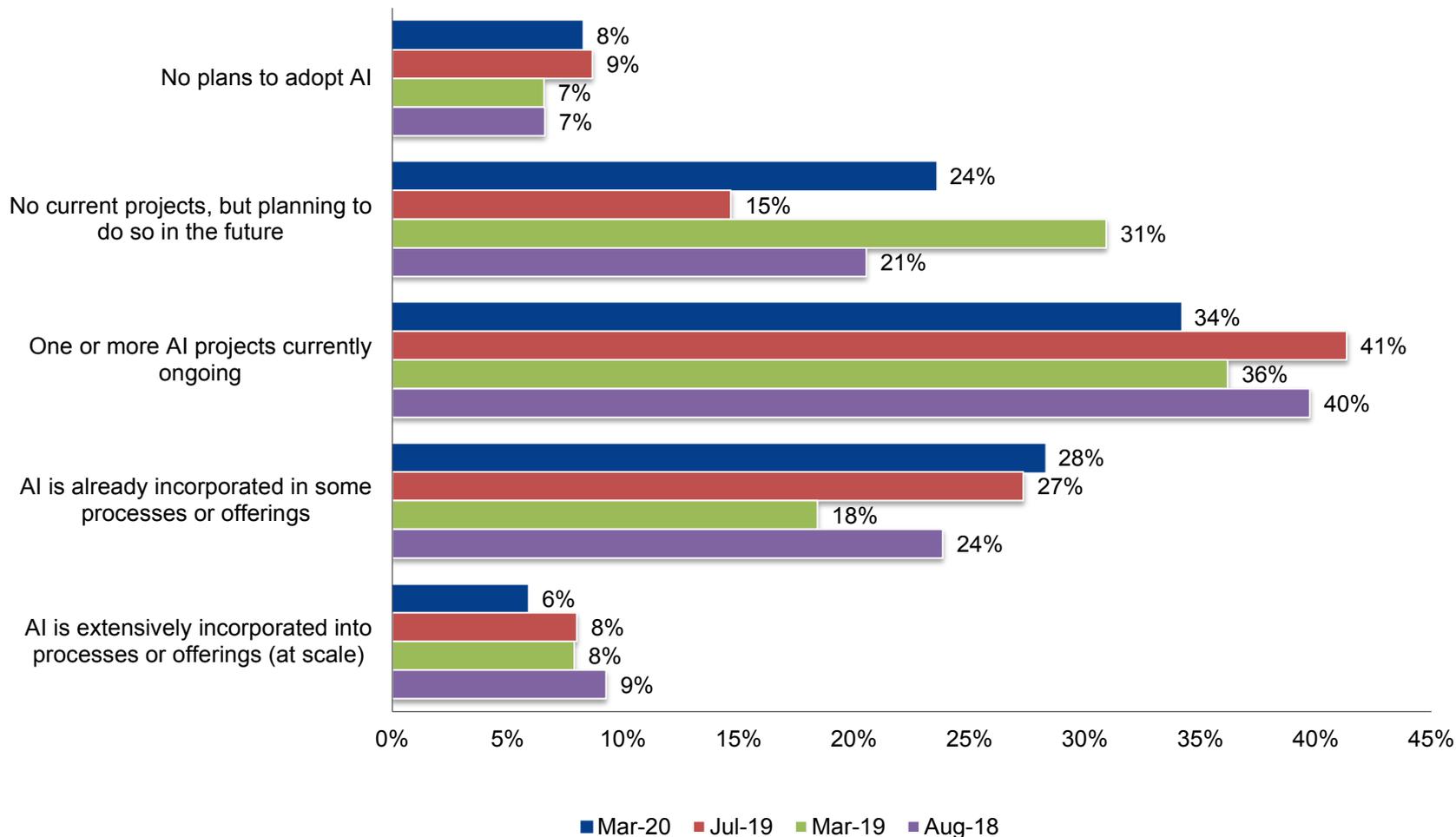
*Which technology do you expect to have the greatest impact on your company in the next five years? (Choose up to three.)*



# Europe—AI Adoption

34% have one or more ongoing AI projects currently, while 28% said AI is already incorporated in some processes or offerings, 24% have none but plan to in the future, and 6% said AI is extensively incorporated in their organization. 8% have no plans to adopt AI.

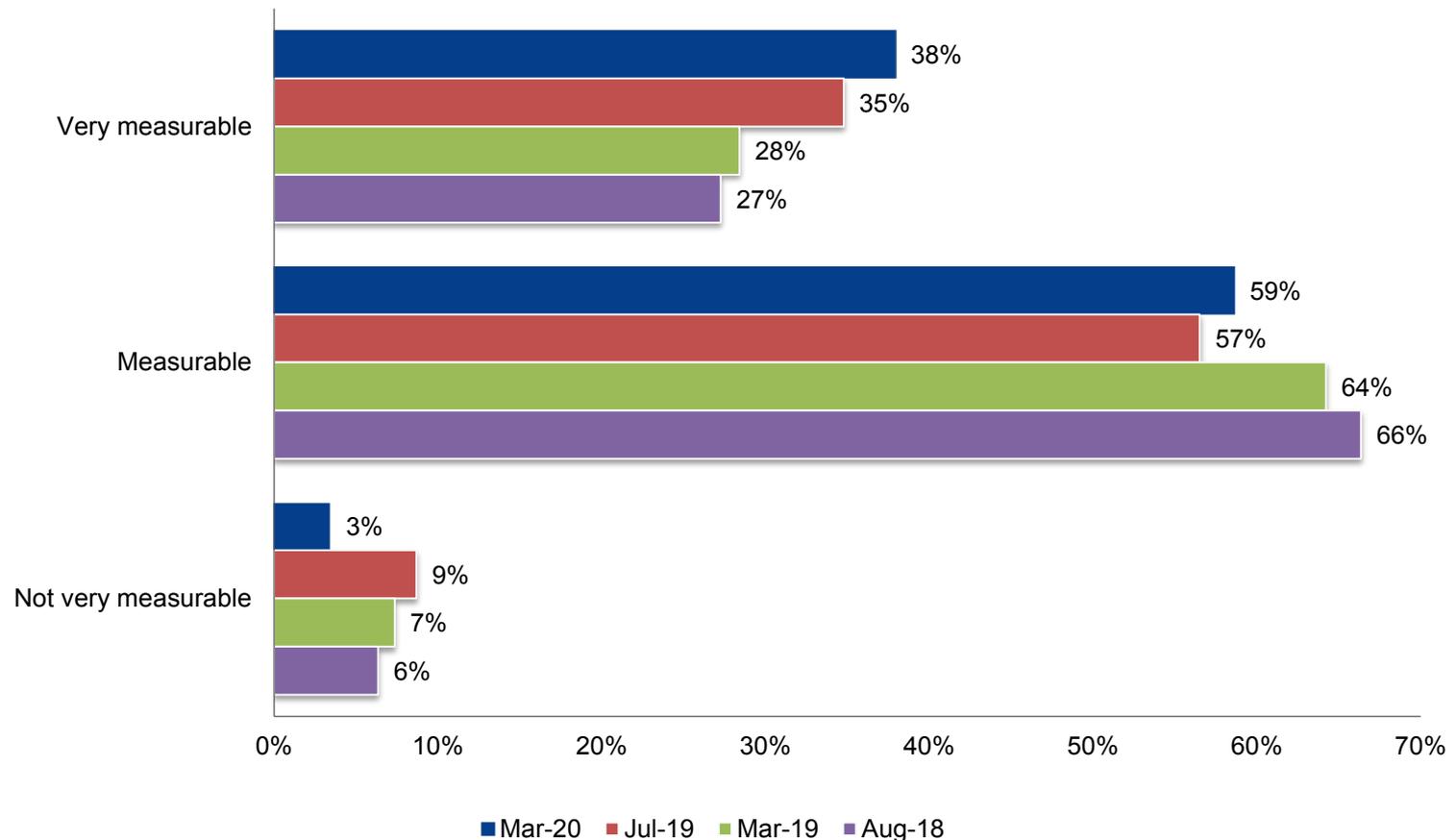
*What is the level of AI adoption in your organization?*



# Europe—Measurability of Results from Big Data and AI

Among respondents who have one or more ongoing AI projects currently, 97% said results from big data and AI are measurable or very measurable.

*Do you see measurable results from big data and AI?*

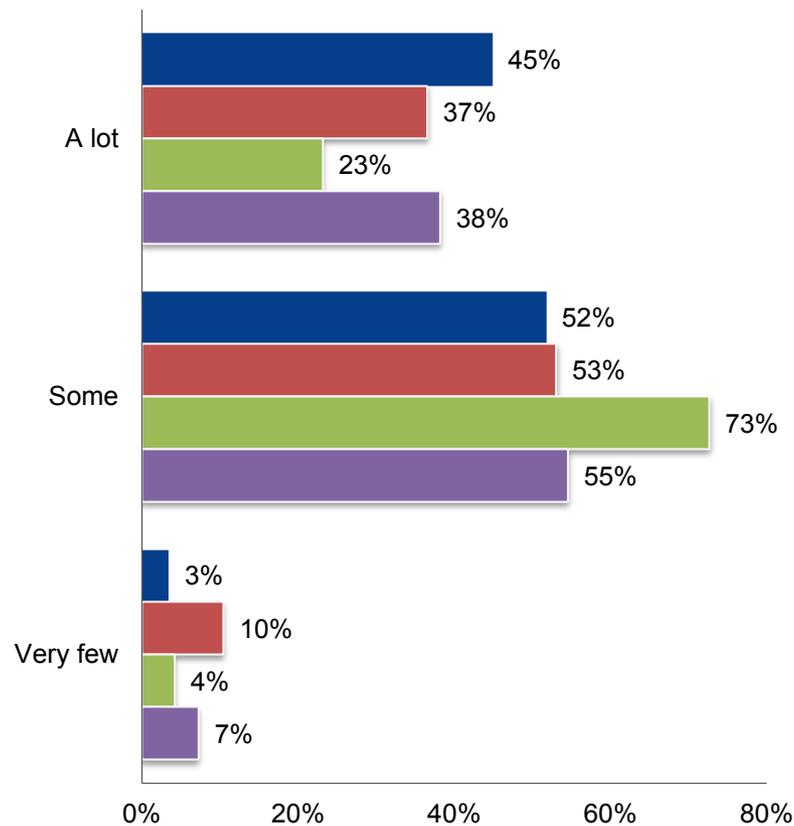
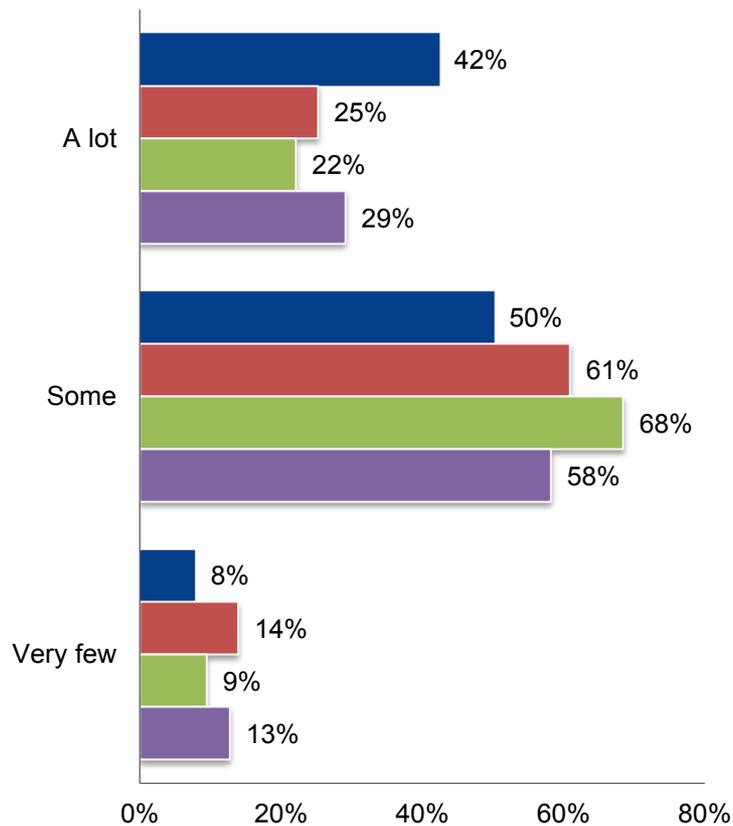


# Europe—No. of AI Projects Underway or Expected

Among respondents who have one or more ongoing AI projects currently, 92% started at least some last year, and 97% plan to start at least some this year.

*How many AI projects did your company start **last year**?*

*How many AI projects do you expect your company to start **this year**?*



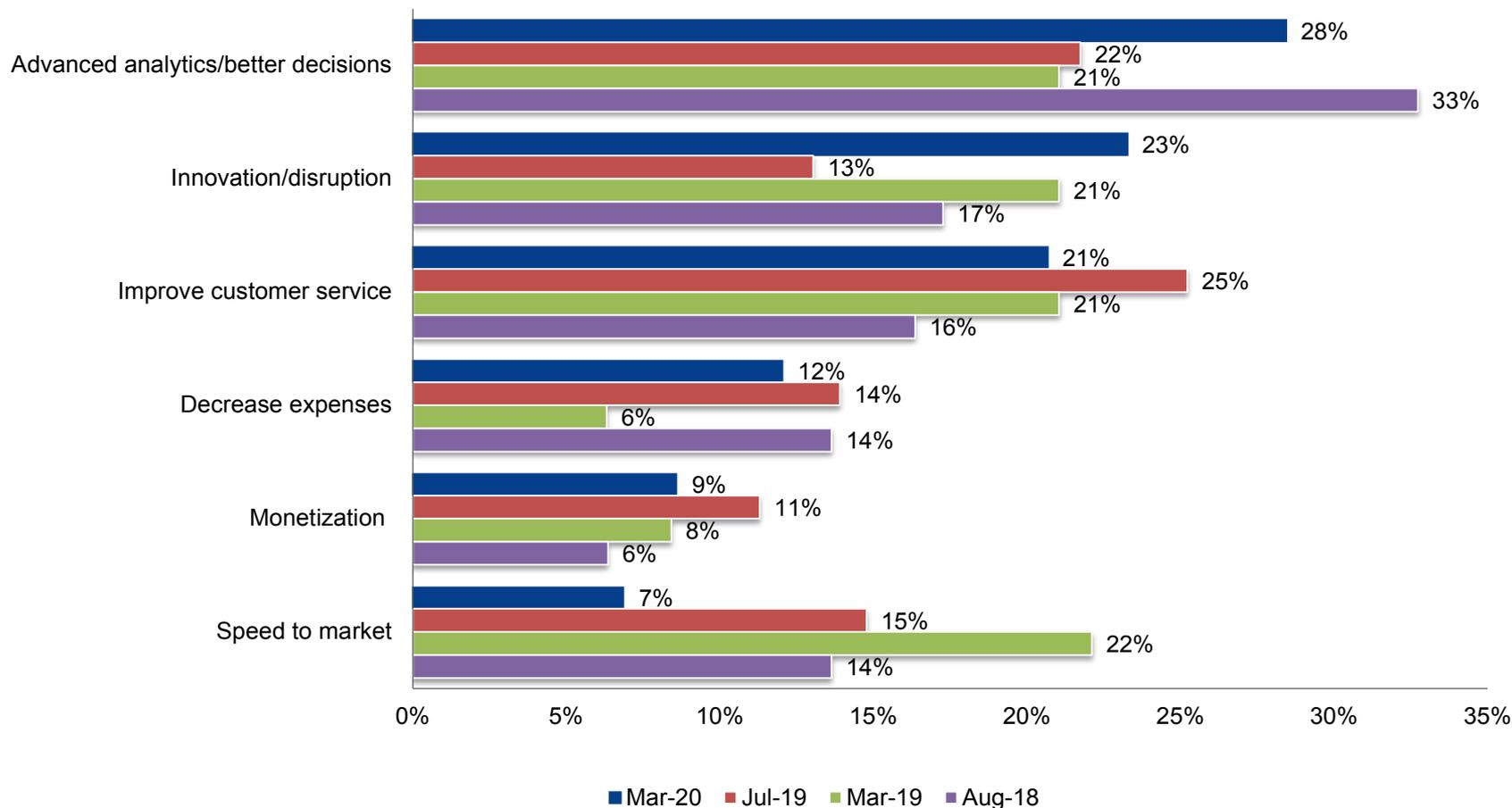
■ Mar-20 ■ Jul-19 ■ Mar-19 ■ Aug-18

■ Mar-20 ■ Jul-19 ■ Mar-19 ■ Aug-18

## Europe—Top Objective of AI Investment

Among respondents who have one or more ongoing AI projects currently, the top objective of investment is advanced analytics/better decisions (28%), followed by innovation/disruption (23%) and improved customer service (21%).

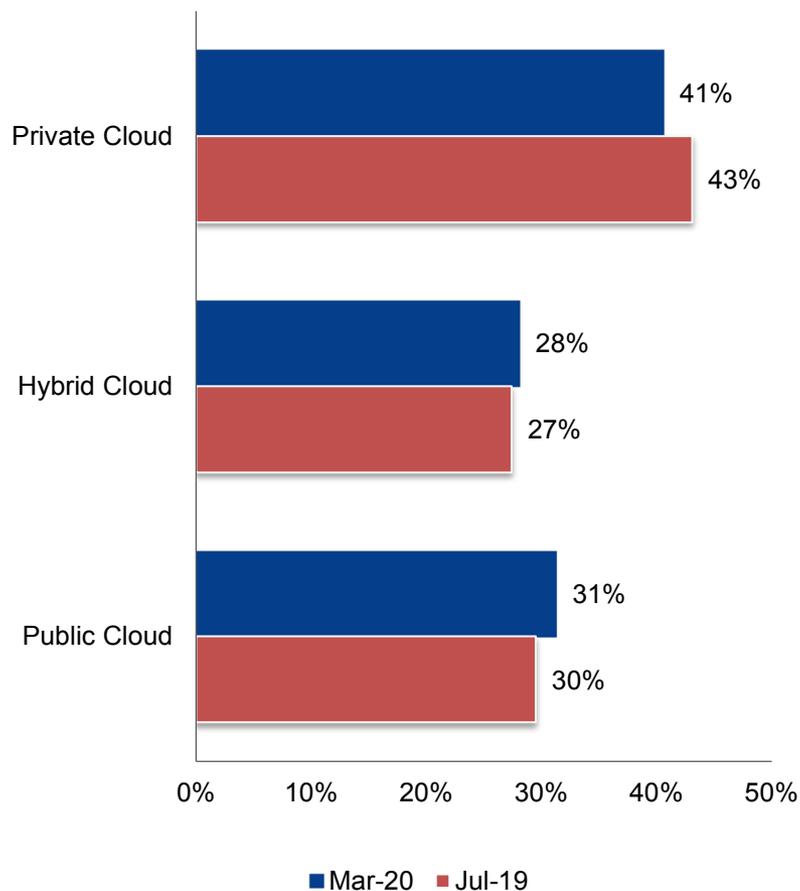
*What is the top objective of AI investment? (Choose one.)*



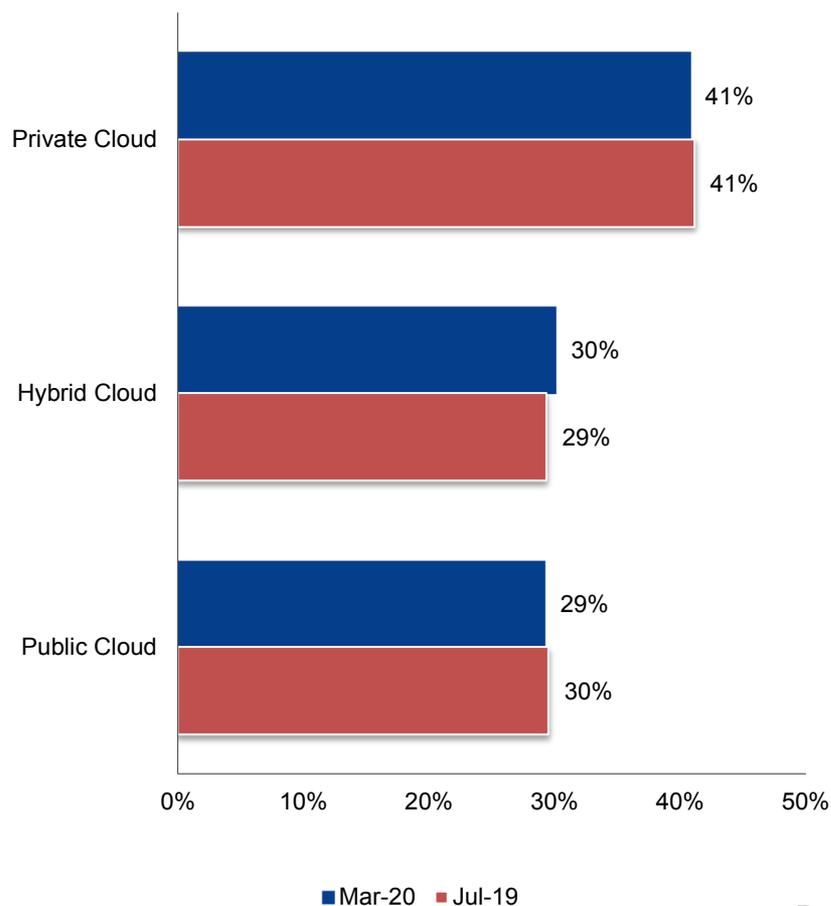
# Europe—Cloud Mix

The current mix of cloud workloads is 41% private, 31% public, and 28% hybrid. The expected mix in five years is 41% private, 30% hybrid, and 29% public.

*What is your current mix of private, hybrid, and public cloud workloads?*



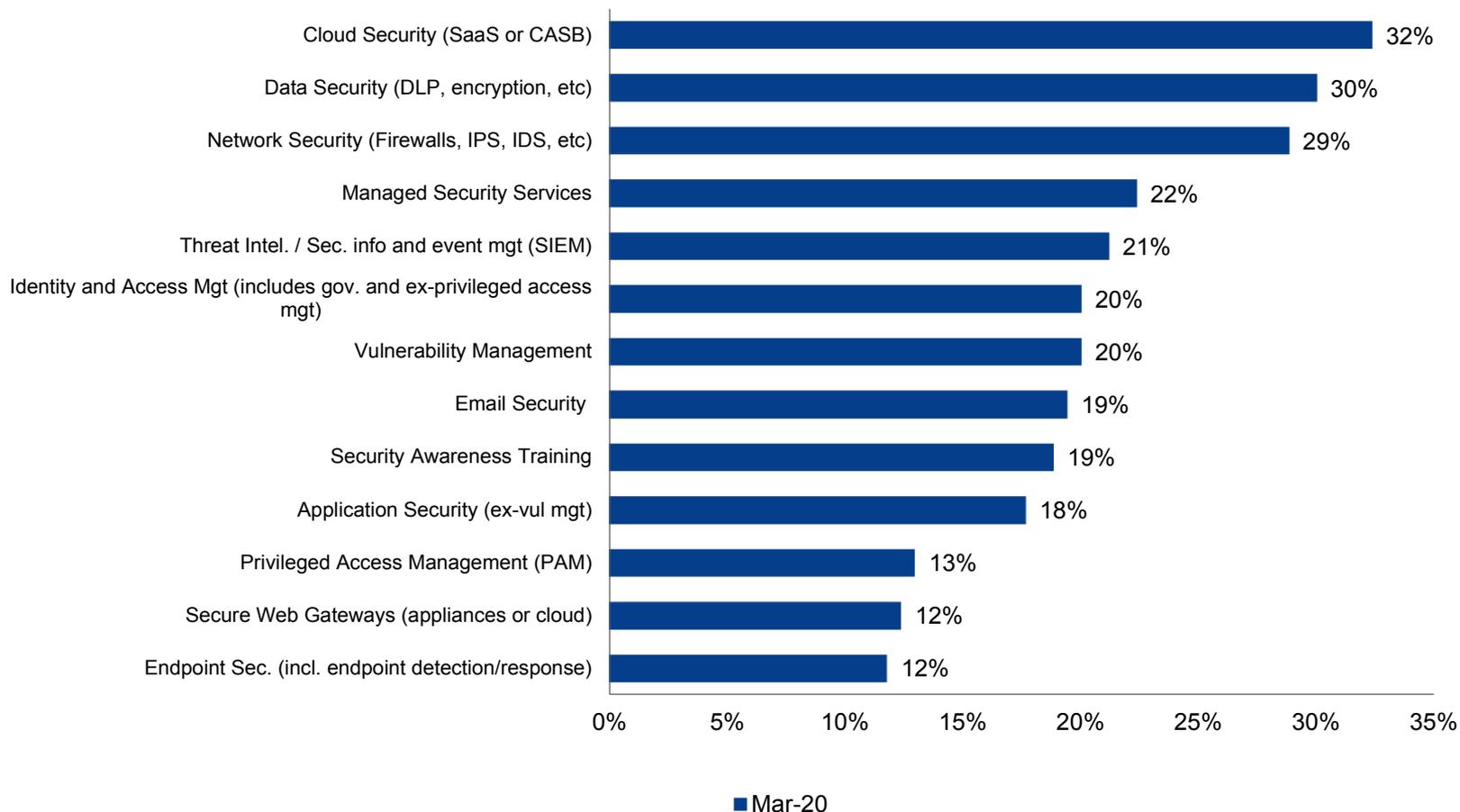
*What do you think your mix will be in five years of private, hybrid, and public cloud workloads?*



# Europe—Security Priorities

The top security priority in 2020 is cloud security (32%), followed by data security (30%).

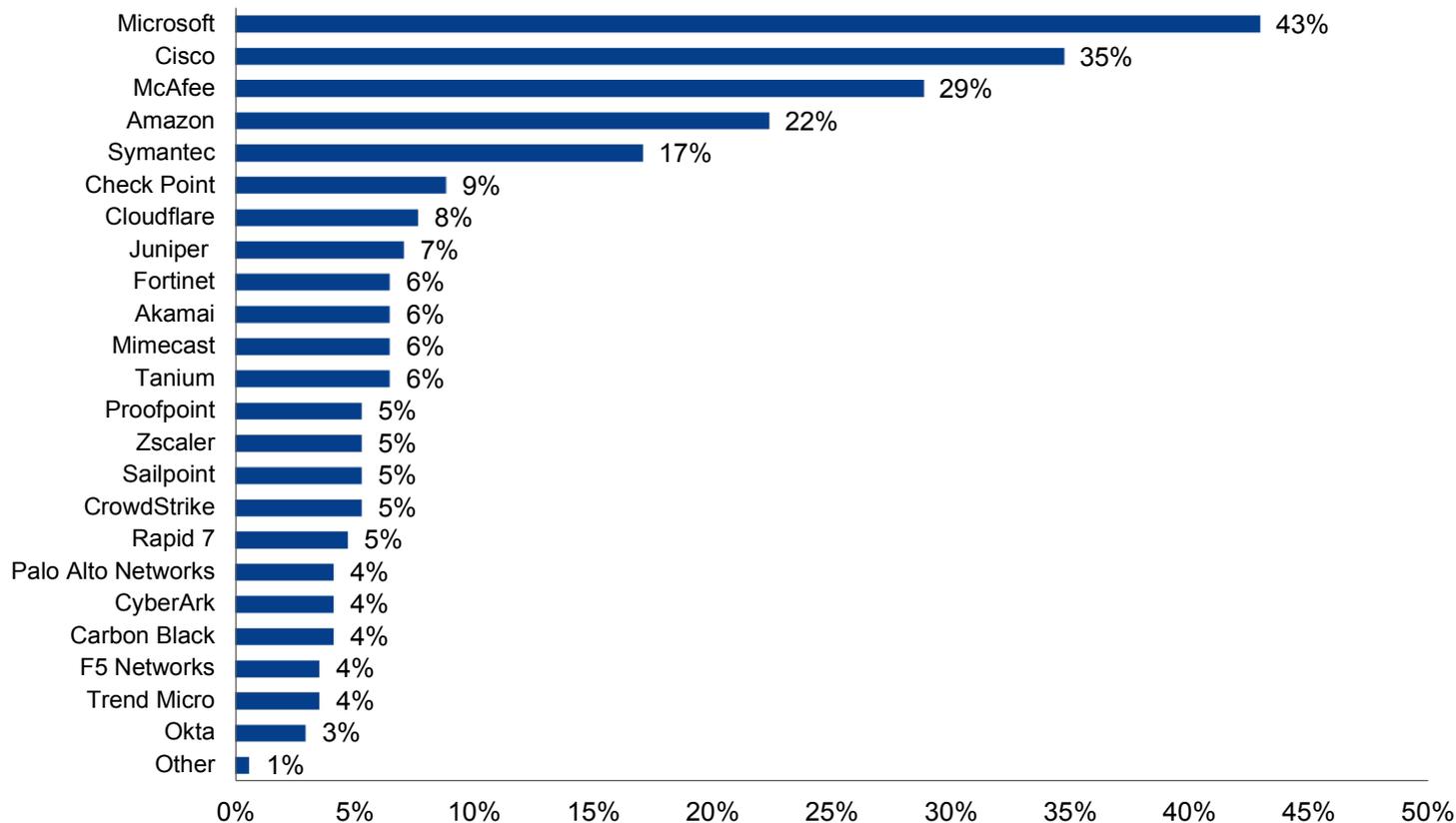
*Which areas of security are your organization's top priorities in terms of spending in the next 12 months (2020)? (Select the top three.)*



# Europe—Security Vendors

The top security vendor that respondents plan the largest percentage spending increase with in 2020 vs. 2019 is Microsoft (43%), followed by Cisco (35%) and McAfee (29%).

*Choose the top security vendors that you plan the largest percentage spend increase in 2020 vs. 2019. (Select up to three.)*

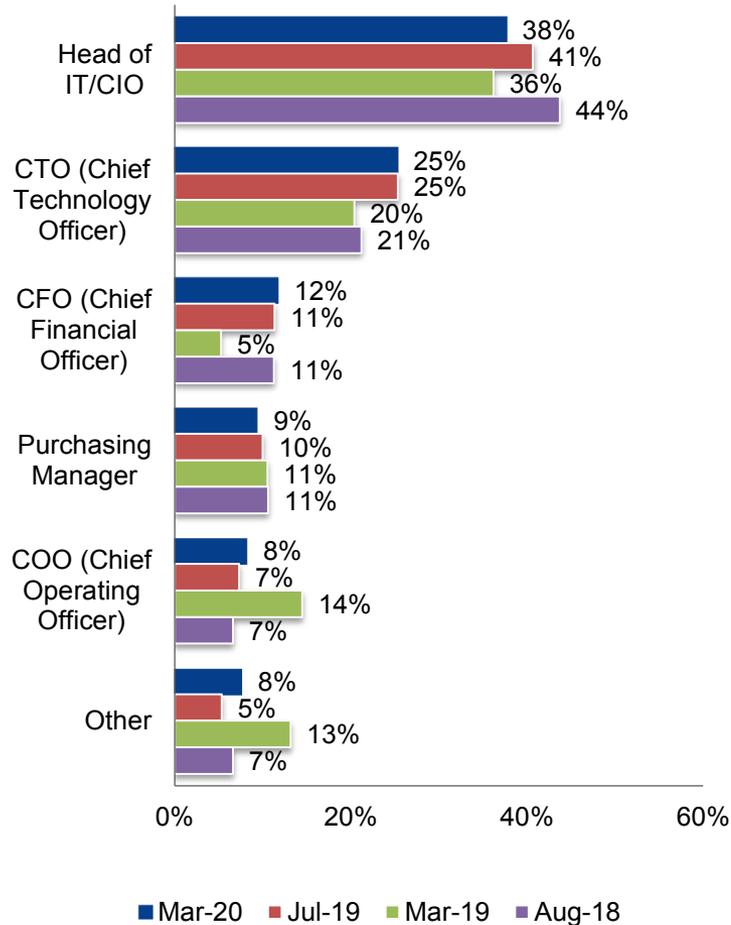


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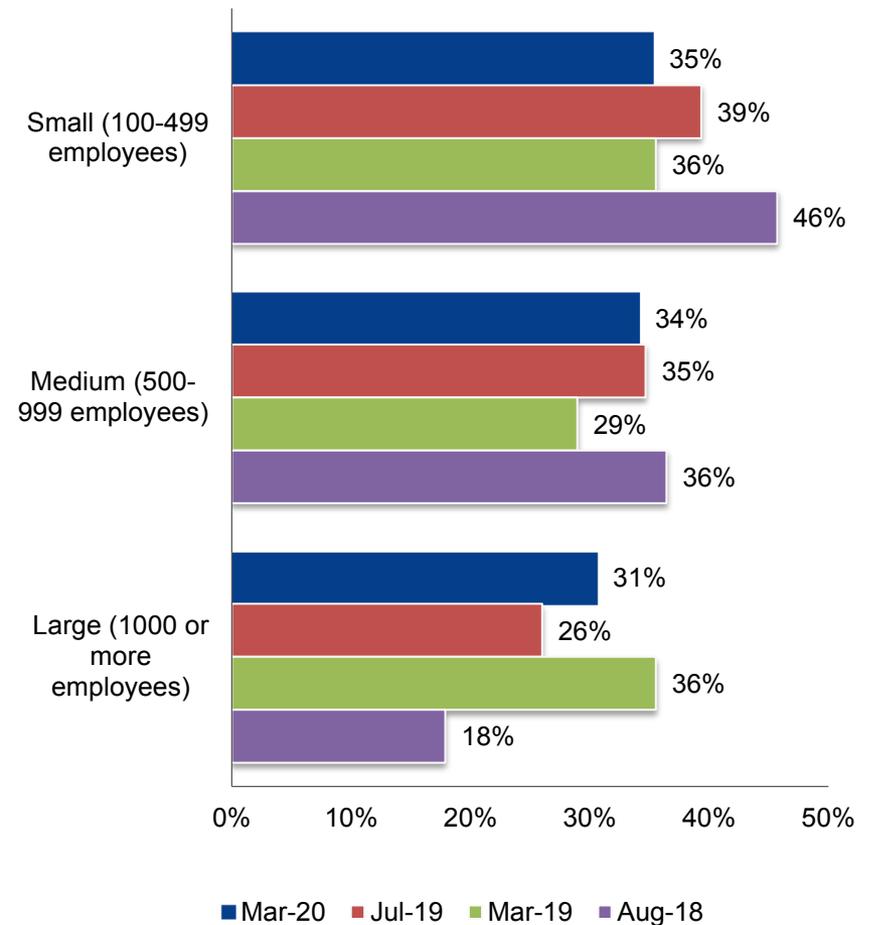
# Europe—Demographic Information (Role with Company and No. of Employees)

This survey comprised 170 IT decision makers at companies with 100 or more employees in Europe.

*What is your role with the company?*



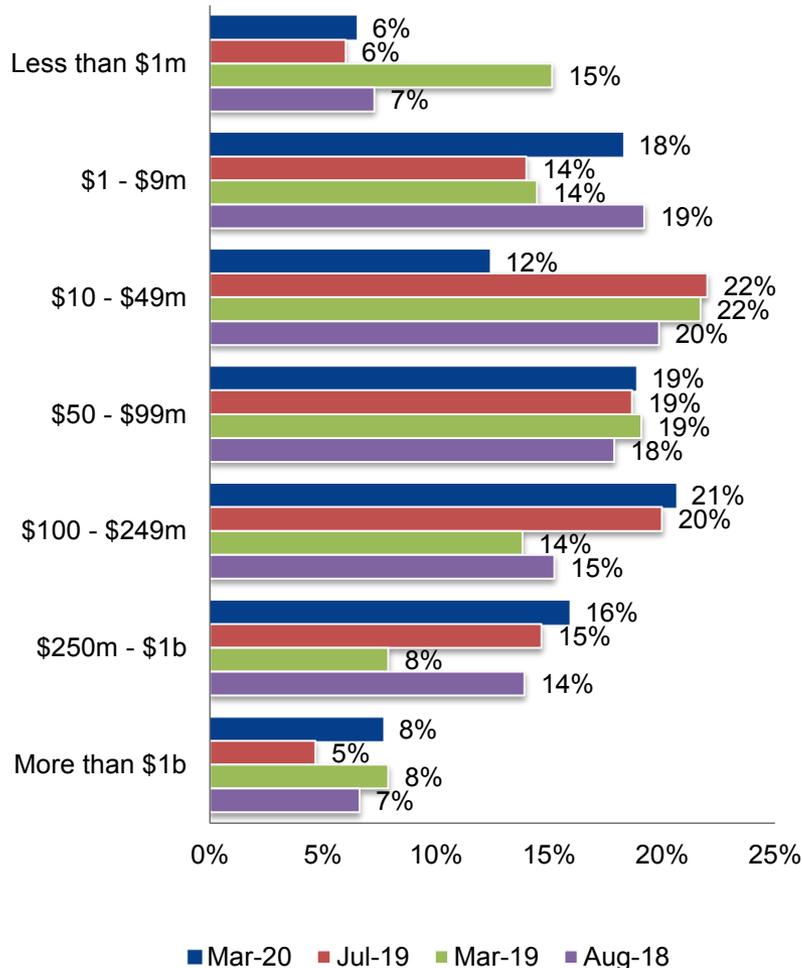
*How many total employees are there at your company?*



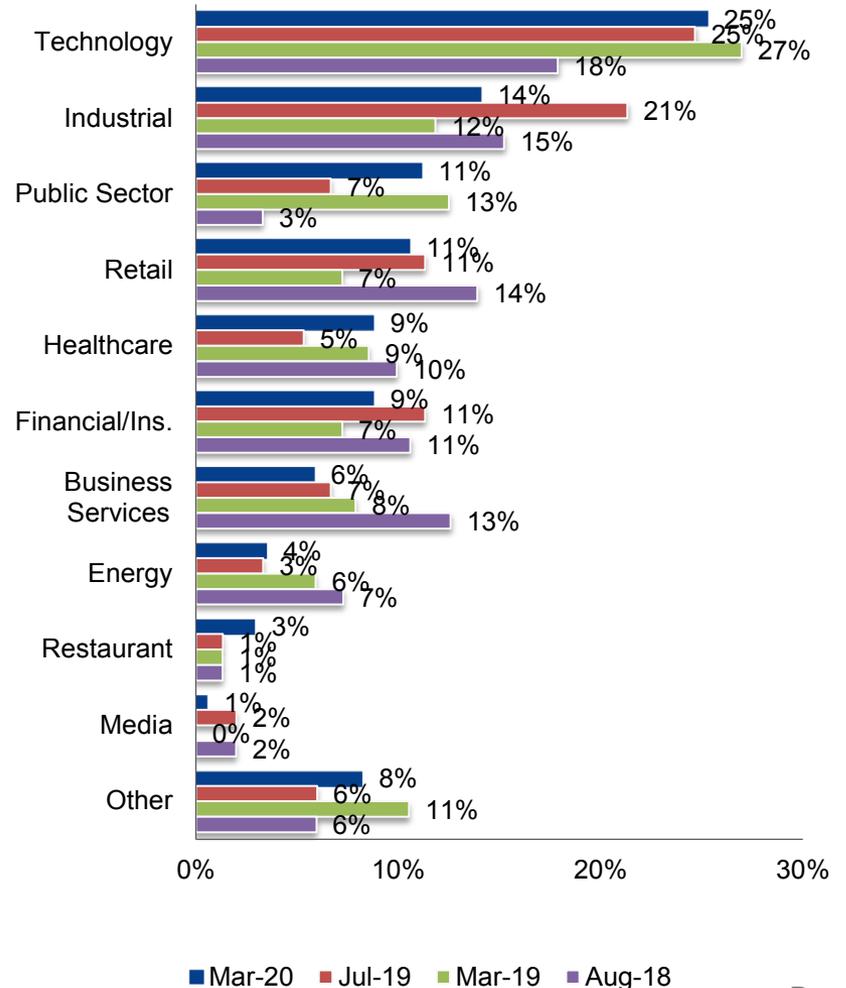
# Europe—Demographic Information (Budget Size and Industry)

This survey comprised 170 IT decision makers at companies with 100 or more employees in Europe.

Indicate your annual IT budget size.



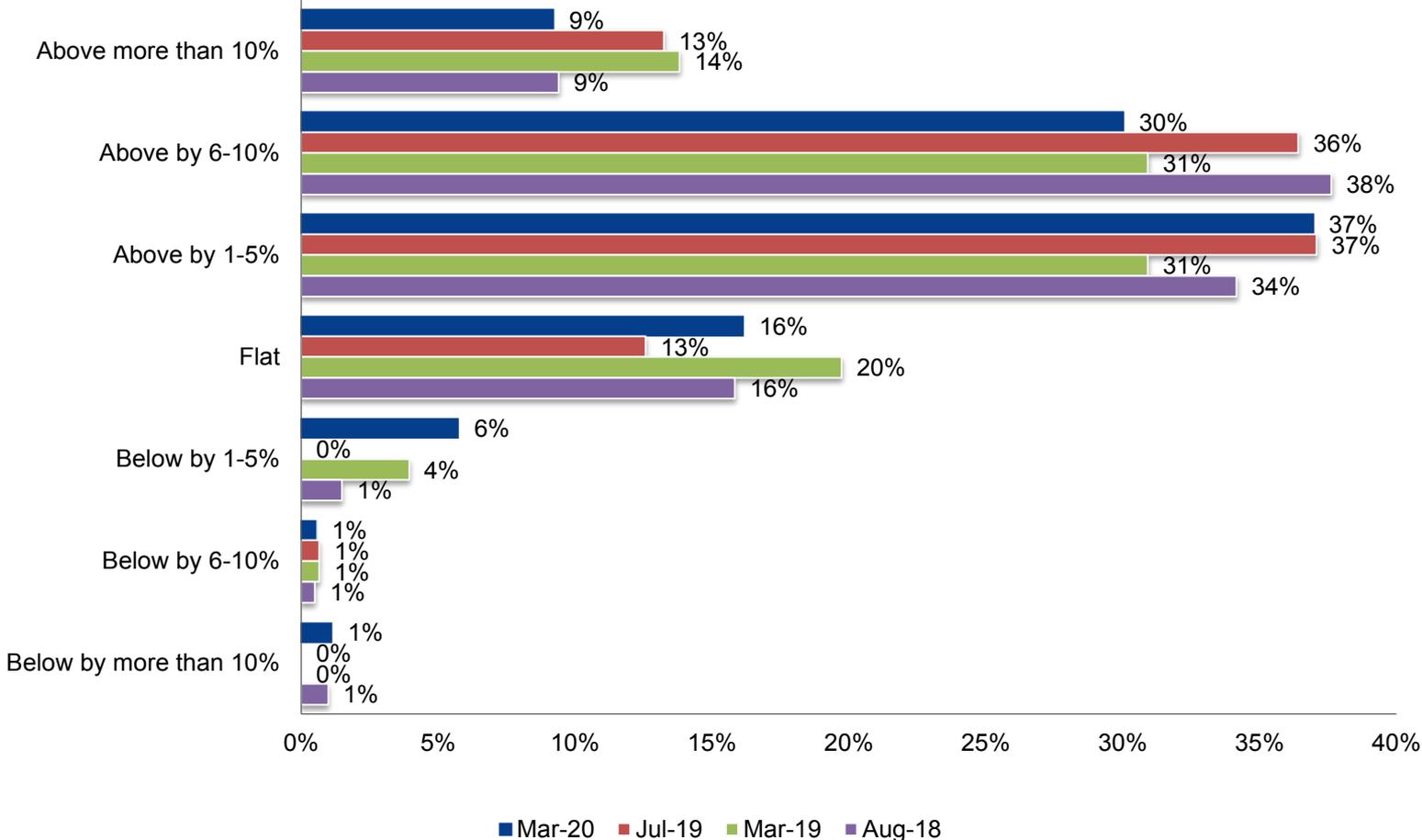
In which industry do you classify your company?



# Asia—2020 IT Budget Expectations

39% expect their 2020 IT budget to increase 6% or more vs. their 2019 IT budget, while 37% expect a 1%–5% increase, 16% expect it to remain flat, and 8% expect it a 1% or more decrease.

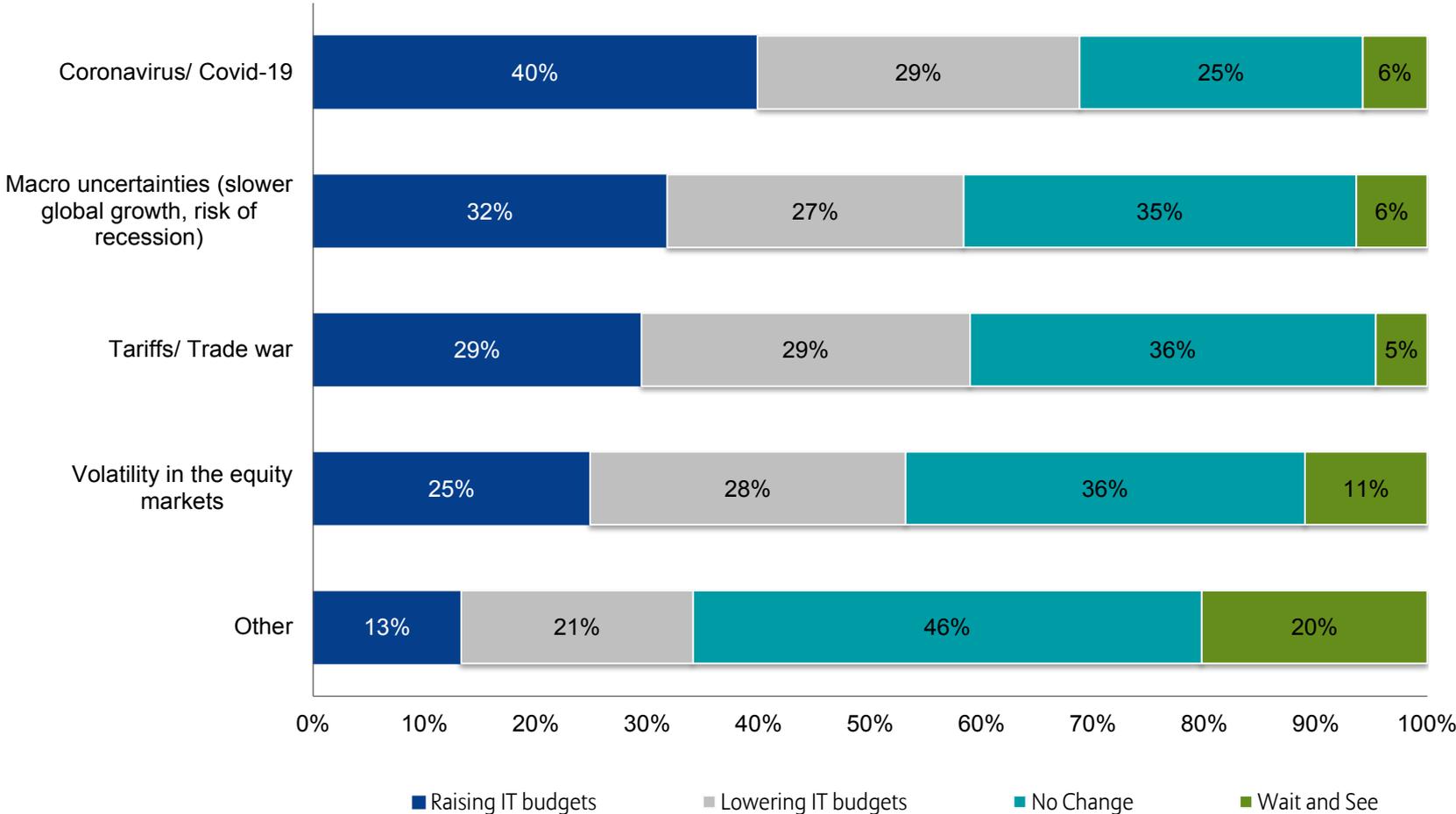
*How do you expect your 2020 IT budget to compare to your 2019 IT budget?*



# Asia—Impact of Macro Events on 2020 IT Budget

40% said COVID-19 has increased their company's willingness to spend on IT projects for 2020 in the past 90 days, while 29% said it has lowered their IT budget.

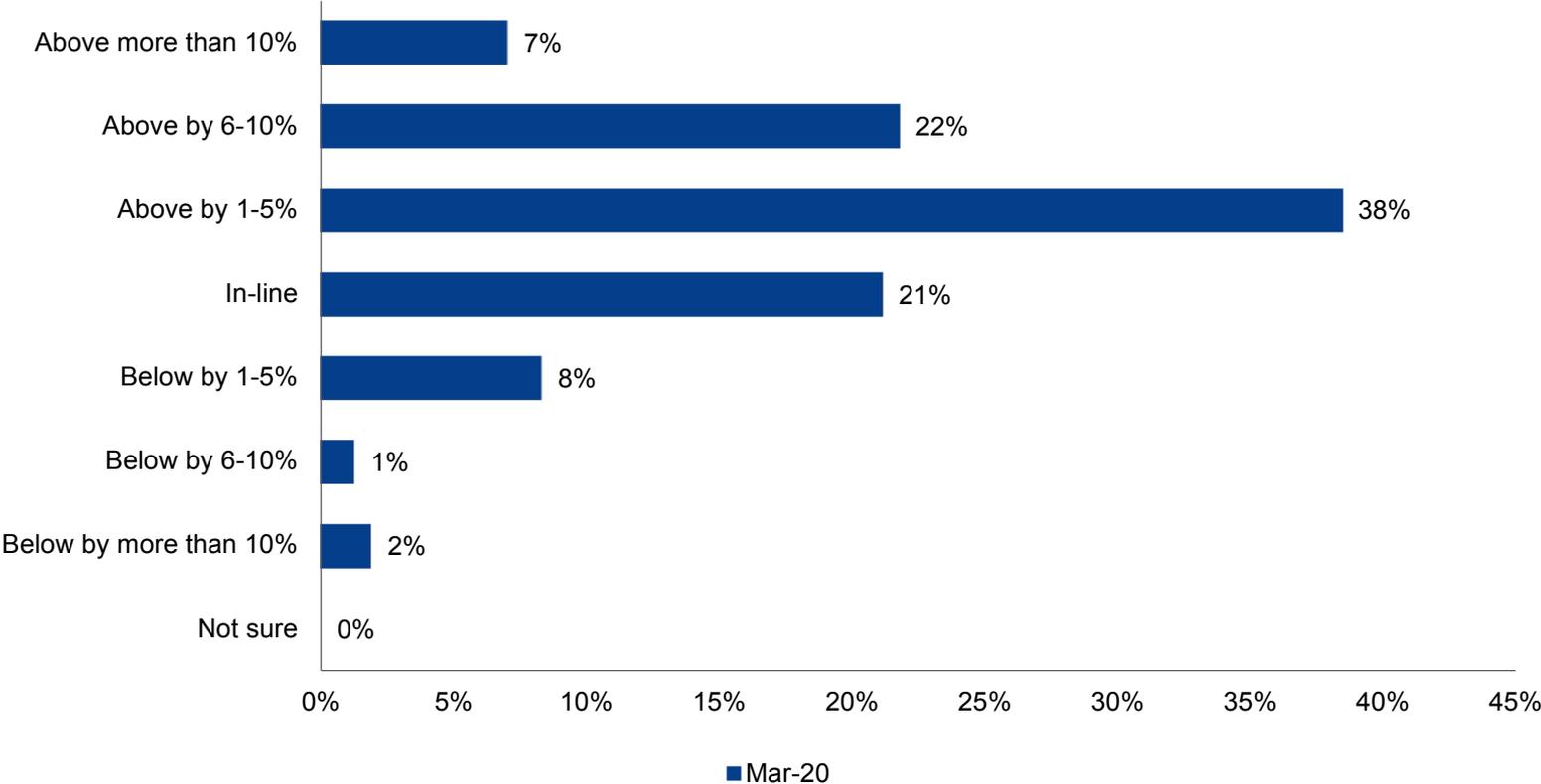
*How have the following affected your company's willingness to spend on IT projects for 2020 in the past 90 days, if at all?*



# Asia—% Impact of Macro Events on 2020 IT Budget

Among respondents who said macro events have affected their company's willingness to spend on IT projects for 2020 in the past 90 days, 38% said their overall IT budget increased 1%–5% in the past 90 days and 29% said 6% or more, while 21% said it remained flat, and 11% said it decreased 1% or more.

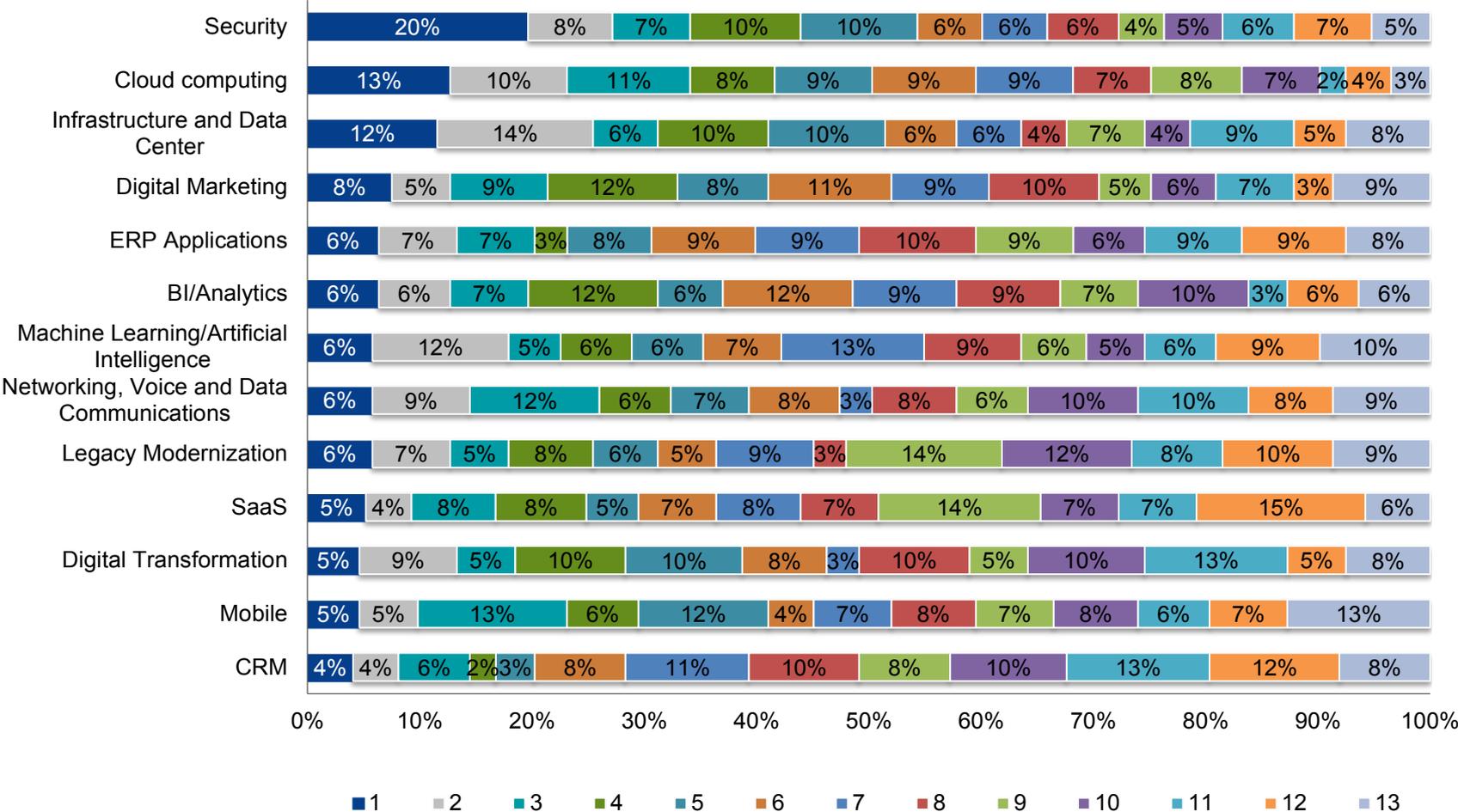
*In the previous question, you indicated that macro events (e.g., tariffs) have affected your company's willingness to spend on IT projects for 2020 in the past 90 days. Can you estimate by how much your overall 2020 IT budget has changed in the past 90 days?*



# Asia—IT Spending Priorities in 2020

The top IT spending priority in 2020 is security (20%), followed by cloud computing (13%).

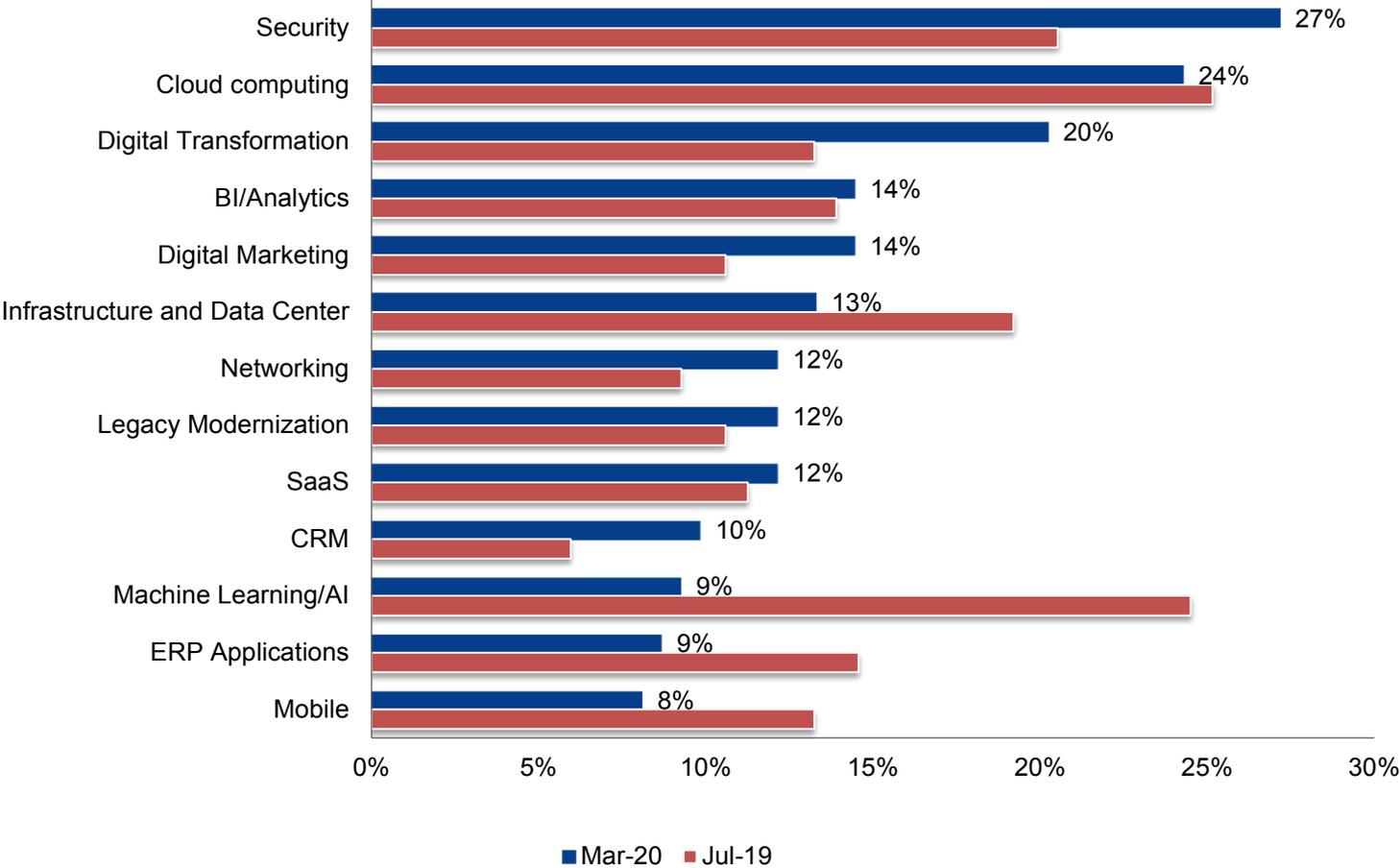
Please drag and drop the following in order of your top IT spending priorities for 2020, with No. 1 being the most important.



# Asia—Categories of Spend Vulnerable to Budget Cuts

In the event of cuts to the IT budget, security and cloud computing would be affected the most.

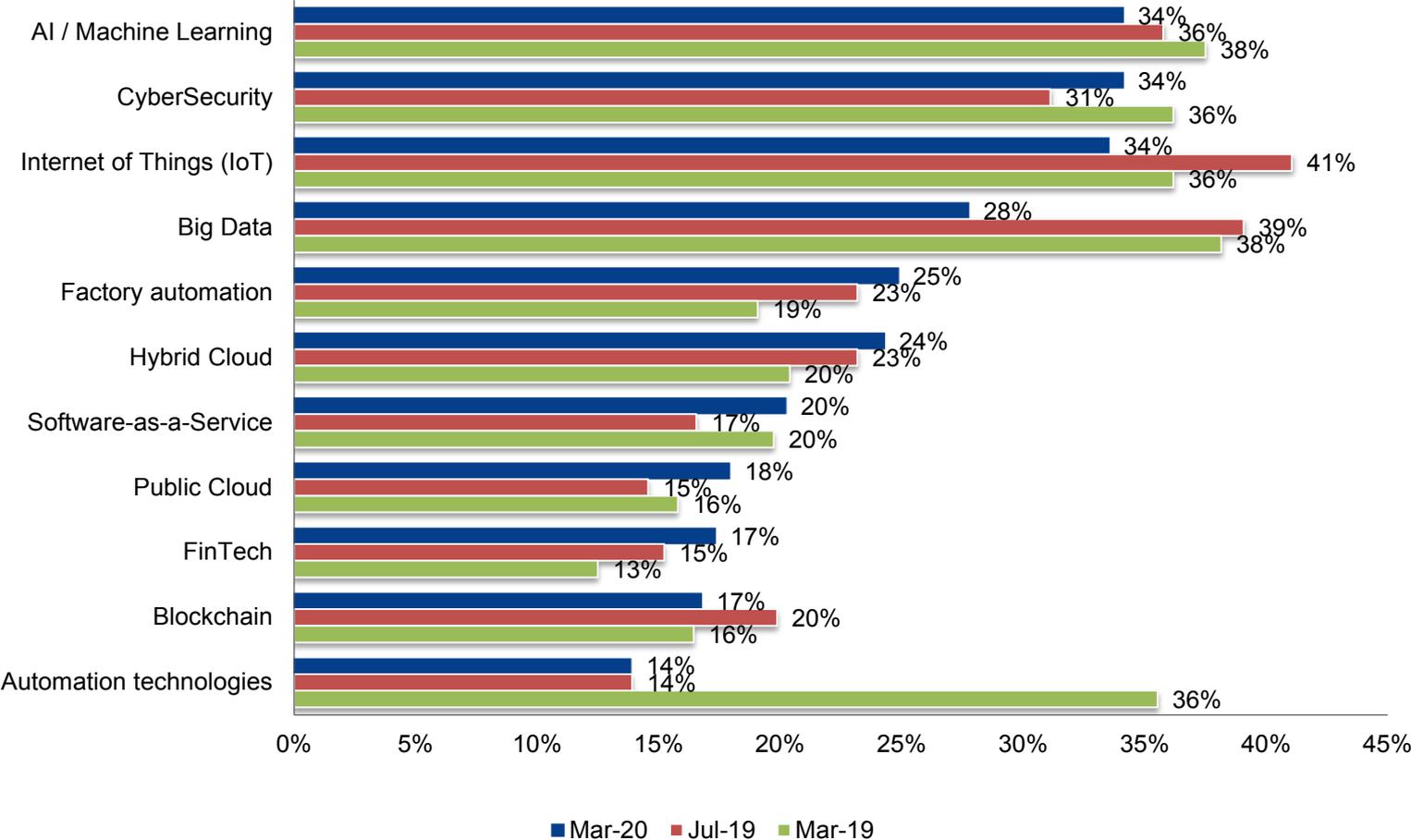
*In the event of cuts to your IT budget, which two broad categories of spending would be affected the most?*



# Asia—Technology with the Greatest Impact in the Next 5 Years

The technologies that respondents expect to have the greatest impact on their companies in the next five years are AI/machine learning, cybersecurity, and IoT (34% each).

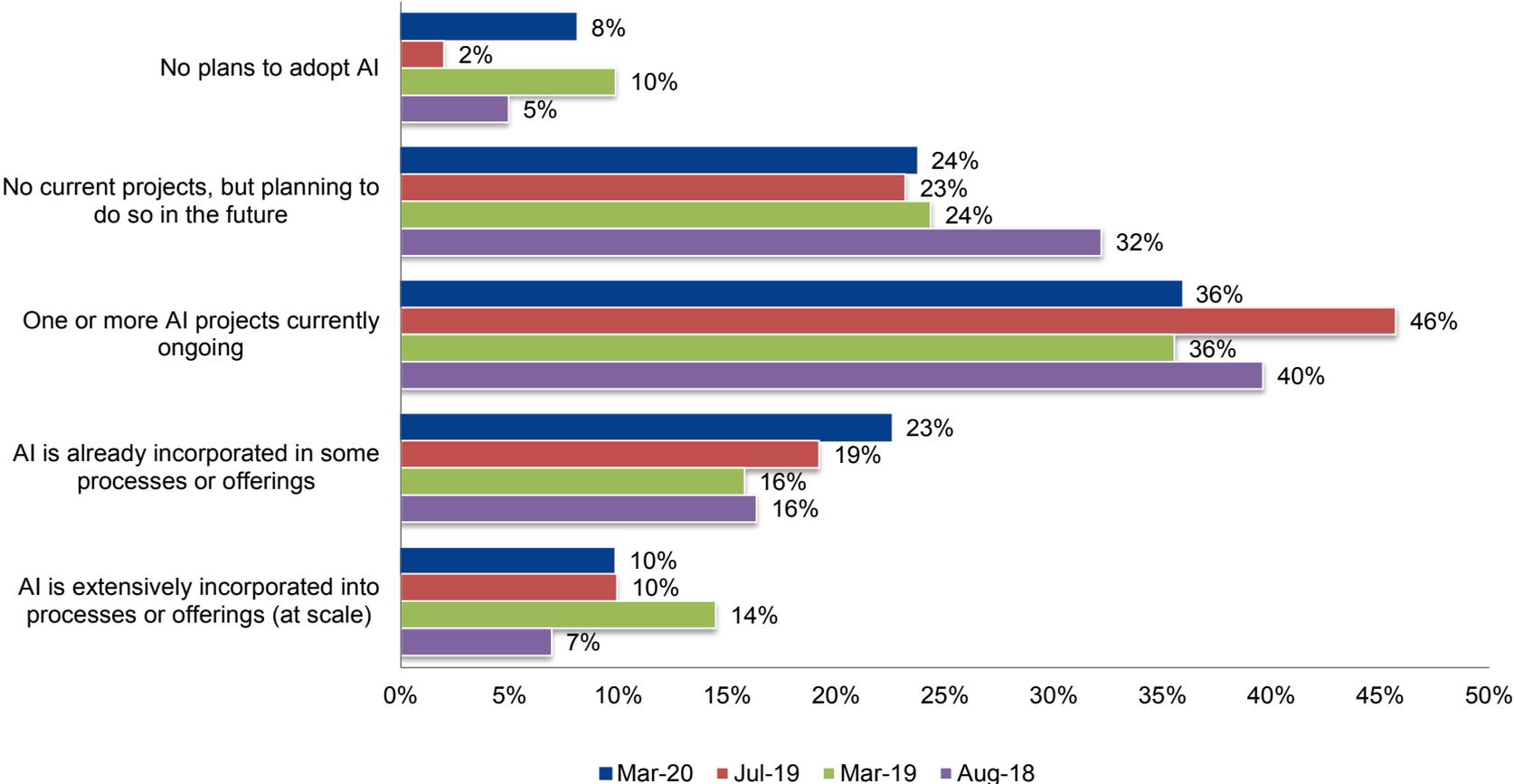
*Which technology do you expect to have the greatest impact on your company in the next five years? (Choose up to three.)*



# Asia—AI Adoption

36% have one or more ongoing AI projects currently, while 24% have none but plan to in the future, 23% said AI is already incorporated in some processes or offerings, and 10% said AI is extensively incorporated in their organization. 8% have no plans to adopt AI.

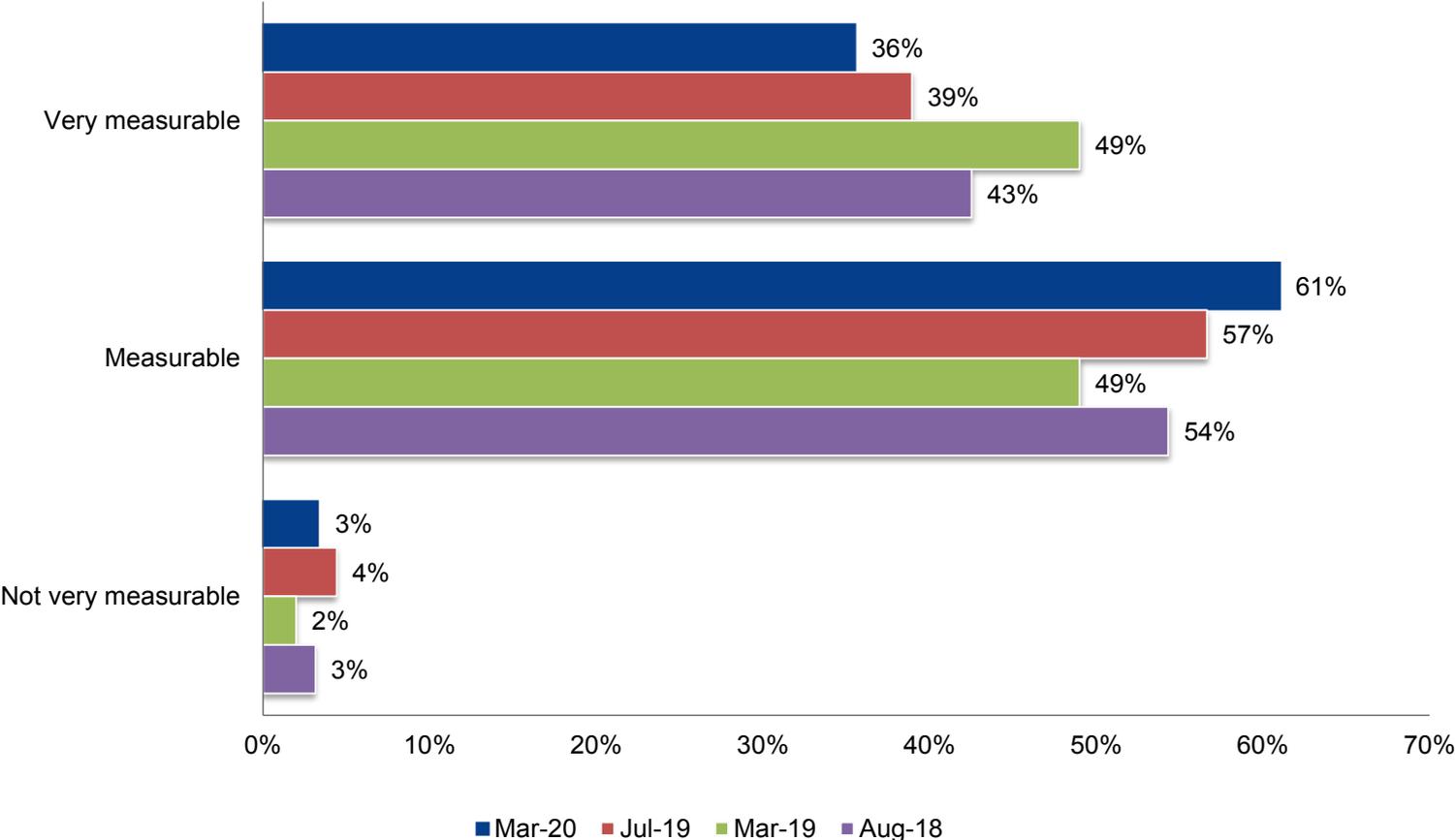
*What is the level of AI adoption in your organization?*



# Asia—Measurability of Results from Big Data and AI

Among respondents who have one or more ongoing AI projects currently, 97% said results from big data and AI are measurable or very measurable.

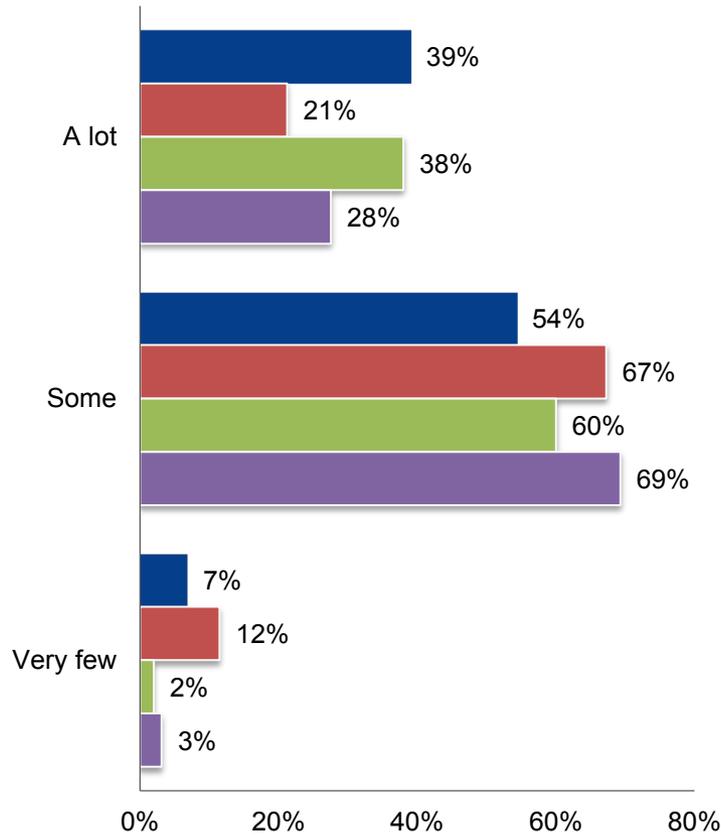
*Do you see measurable results from big data and AI?*



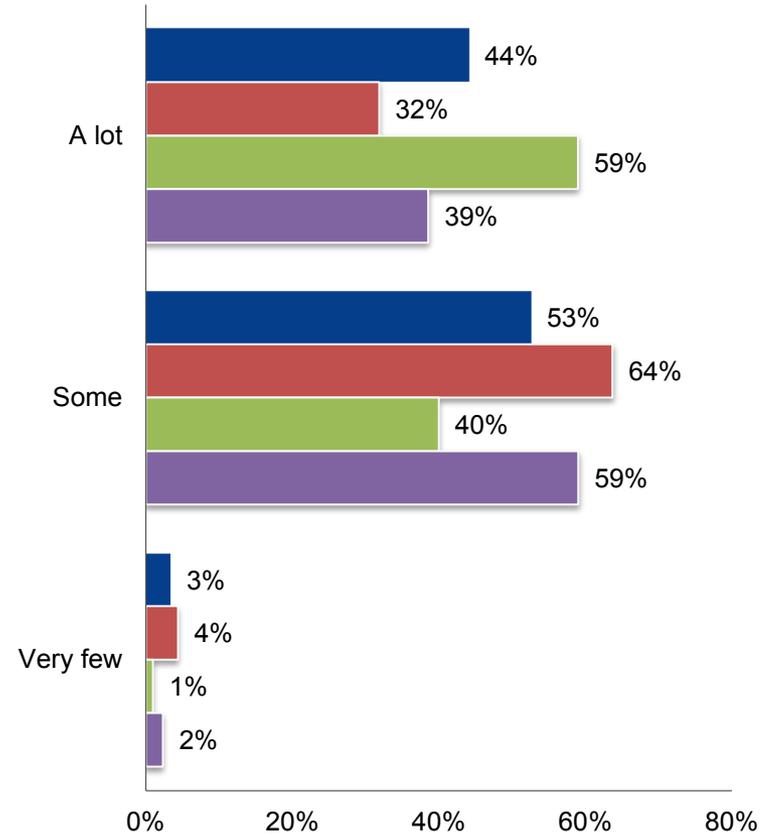
# Asia—No. of AI Projects Underway or Expected

Among respondents who have one or more ongoing AI projects currently, 93% started at least some last year, and 97% plan to start at least some this year.

*How many AI projects did your company start **last year**?*



*How many AI projects do you expect your company to start **this year**?*



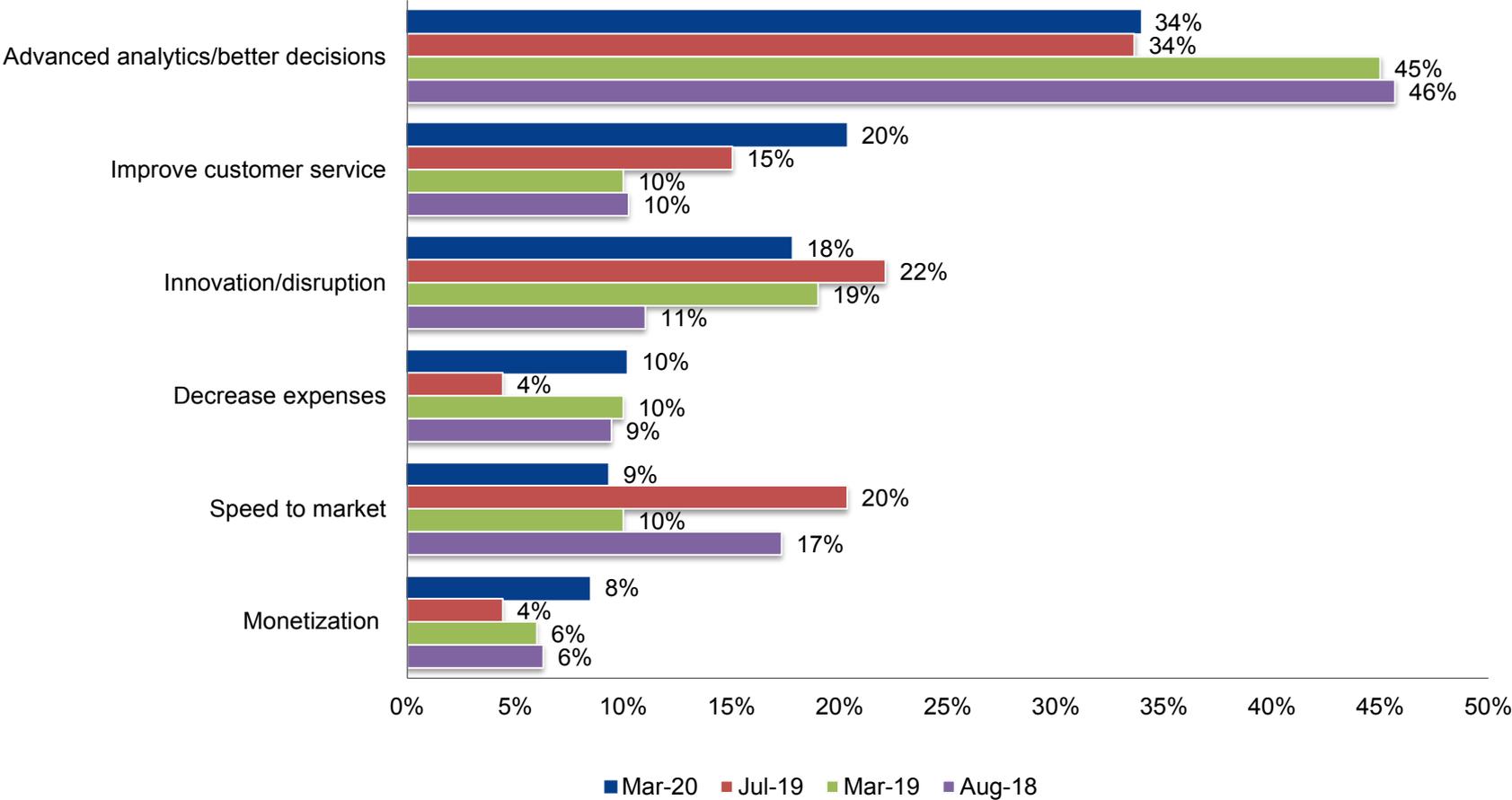
■ Mar-20 ■ Jul-19 ■ Mar-19 ■ Aug-18

■ Mar-20 ■ Jul-19 ■ Mar-19 ■ Aug-18

# Asia—Top Objective of AI Investment

Among respondents who have one or more ongoing AI projects currently, the top objective of investment is advanced analytics/better decisions (34%), followed by improved customer service (20%) and innovation/disruption (18%).

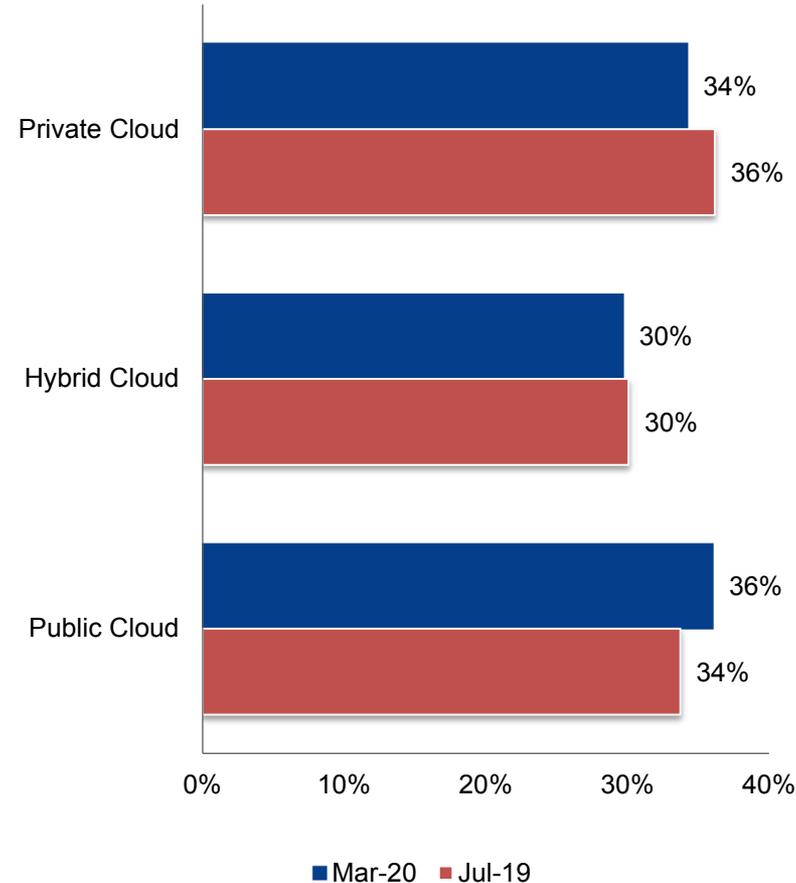
*What is the top objective of AI investment? (Choose one.)*



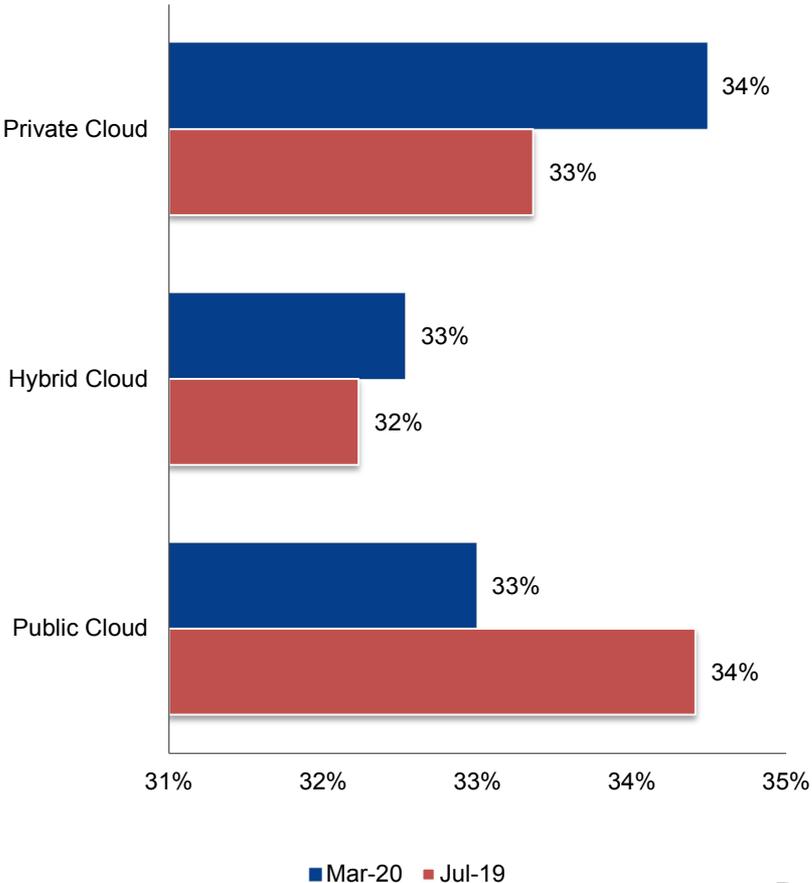
# Asia—Cloud Mix

The current mix of cloud workloads is 34% private, 36% public, and 30% hybrid. The expected mix in five years is 33% public, 34% private, and 33% hybrid.

*What is your current mix of private, hybrid, and public cloud workloads?*



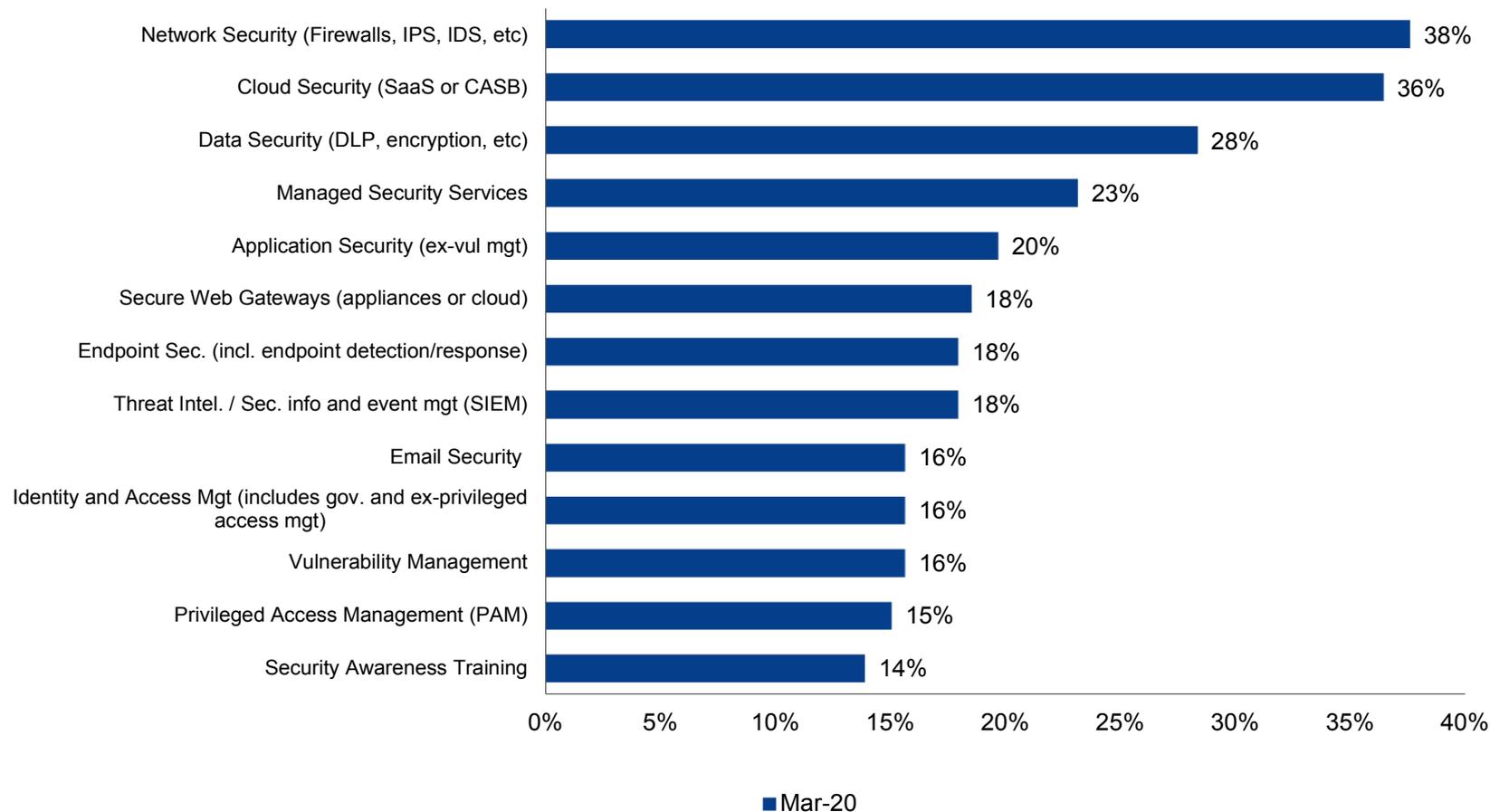
*What do you think your mix will be in five years of private, hybrid, and public cloud workloads?*



# Asia—Security Priorities

The top security priority in 2020 is network security (38%), followed by cloud security (36%).

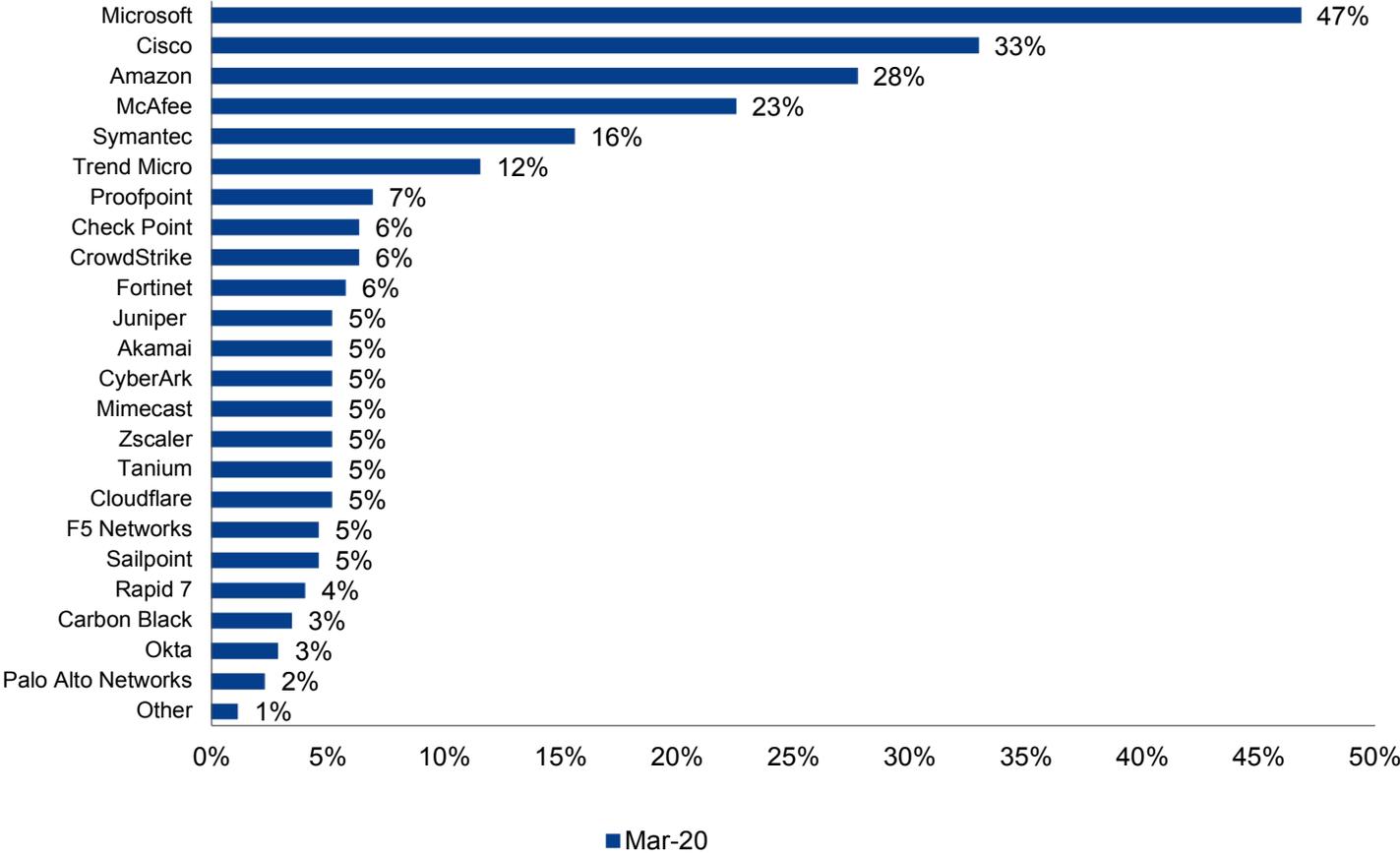
*Which areas of security are your organization's top priorities in terms of spending in the next 12 months (2020)? (Select the top three.)*



# Asia—Security Vendors

The top security vendor that respondents plan the largest percentage spending increase with in 2020 vs. 2019 is Microsoft (47%), followed by Cisco (33%) and Amazon (28%).

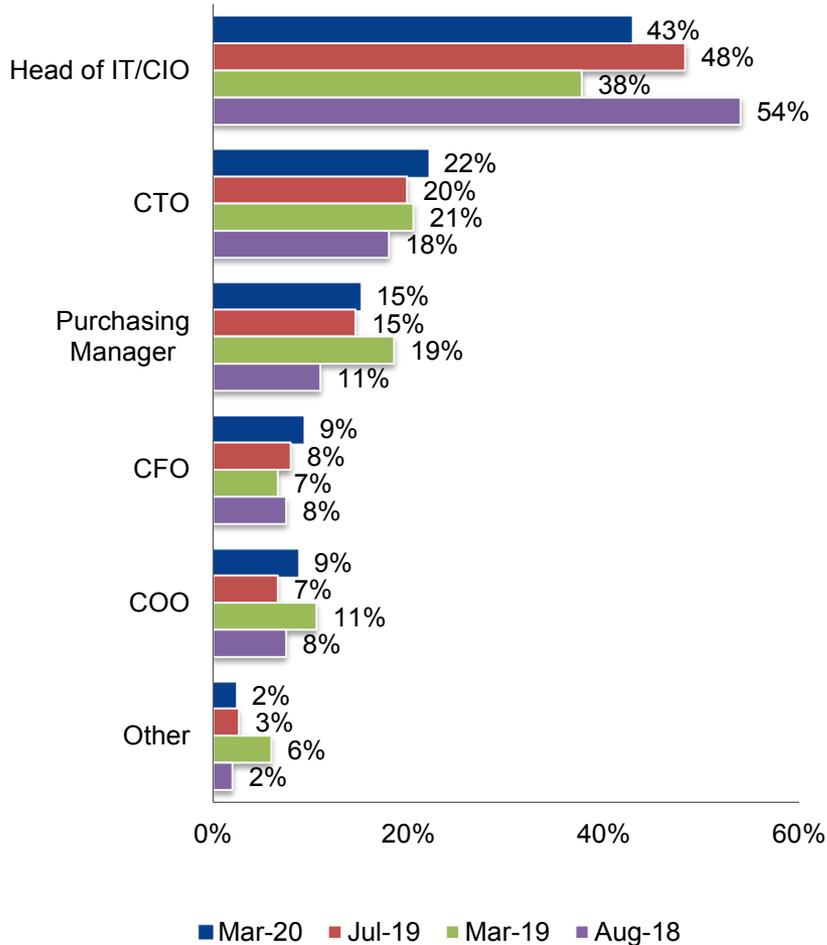
*Choose the top security vendors that you plan the largest percentage spend increase in 2020 vs. 2019. (Select up to three.)*



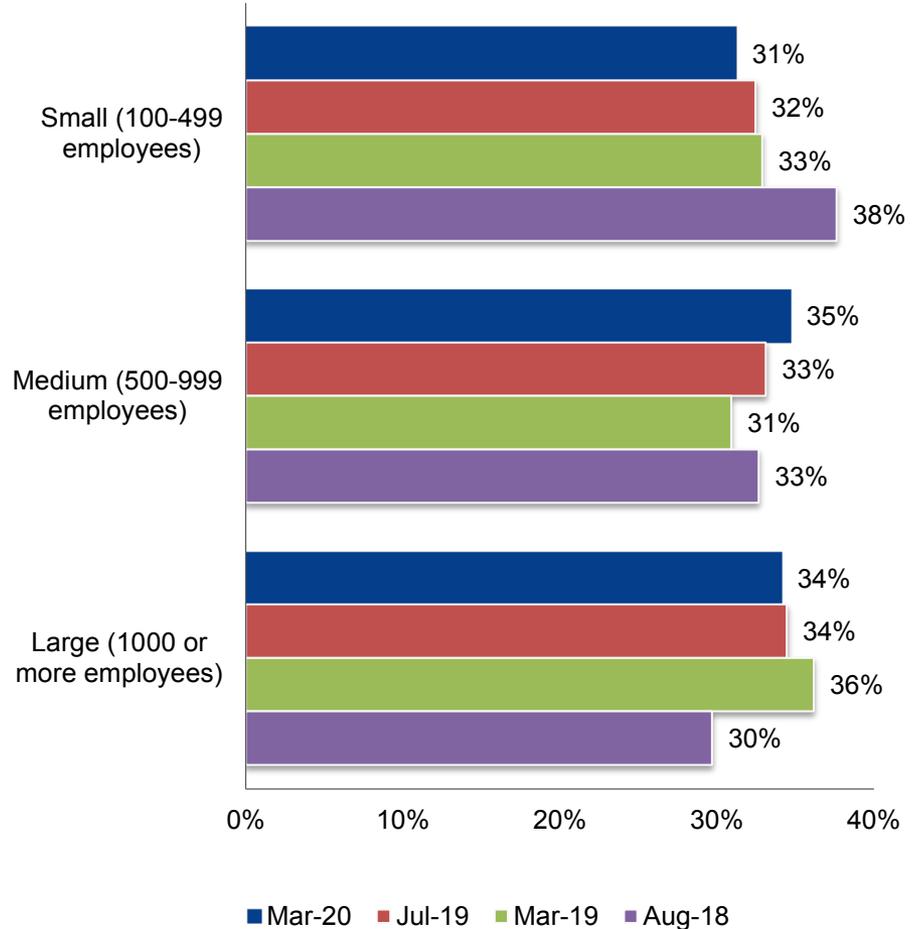
# Asia—Demographic Information (Role with Company and No. of Employees)

This survey comprised 173 IT decision makers at companies with 100 or more employees in Asia.

*What is your role with the company?*



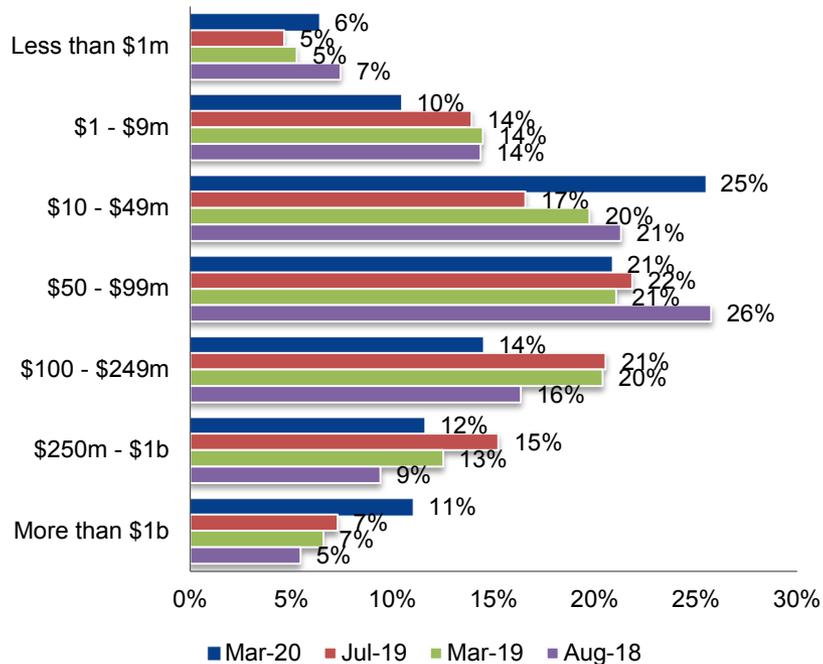
*How many total employees are there at your company?*



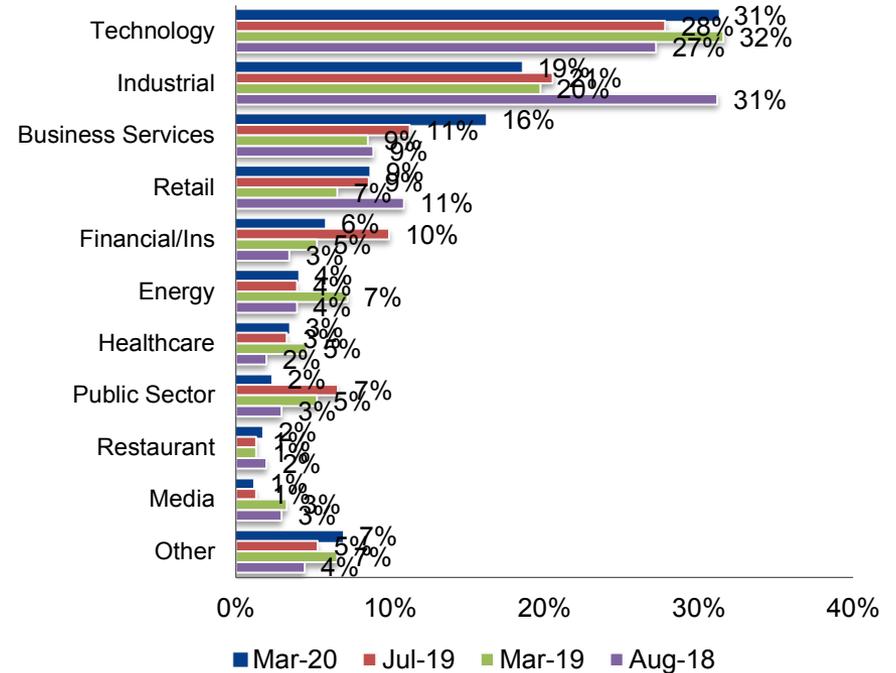
# Asia—Demographic Information (Budget Size and Industry)

This survey comprised 173 IT decision makers at companies with 100 or more employees in Asia.

Indicate your annual IT budget size.



In which industry do you classify your company?



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