

OCTOBER 2024

# GROWING UP: NAVIGATING GEN AI'S EARLY YEARS

**Full Report**

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## Study Leaders & Authors



### Jeremy Korst

PARTNER,  
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Jeremy is a former CMO and product management executive with leading brands including Microsoft, T-Mobile, and Avalara – with a proven track record of driving profitable growth using innovative product and go-to-market approaches.

Jeremy is also active in the early-stage ecosystem, serving as an advisor to a diverse portfolio including Mint Mobile (acquired by T-Mobile) and Oleria (Salesforce backed enterprise security startup). Jeremy has served on Intel's Communications Advisory Board, the IT Services Marketing Association Board of Directors, the CTIA workgroup on Emerging Device. He received his MBA from the Wharton School and now serves on its executive board. His works have been featured in a variety of outlets, including Harvard Business Review, Fast Company, Entrepreneur, Martech and Forbes.



### Stefano Puntoni, PhD

FACULTY CO-DIRECTOR,  
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Stefano is the Sebastian S. Kresge Professor of Marketing at The Wharton School and Faculty Co-Director of AI at Wharton. Prior to joining the University of Pennsylvania, Stefano was a professor of marketing and head of department at the Rotterdam School of Management, Erasmus University, in the Netherlands. He holds a PhD in marketing from London Business School and a degree in Statistics and Economics from the University of Padova, in his native Italy.

Most of his ongoing research investigates how new technology is changing consumption and society. He is a former MSI Young Scholar and MSI Scholar, and the winner of several grants and awards. He is currently an Associate Editor at the Journal of Consumer Research and at the Journal of Marketing. Stefano teaches in the areas of marketing strategy, new technologies, brand management, and decision making.



### Mary Purk

EXECUTIVE DIRECTOR,  
AI AT WHARTON

As Executive Director of AI at Wharton, Mary leads the AI academic research center that focuses on how AI tools can be utilized to solve business problems, customer journeys, and discover the human impact of AI and smart technologies for consumers, firms, and society.

She and the AIW team leverage the resources of the Wharton School to be seen as a world leader in the study of the business and societal impacts of advances in AI and technology to keep the world informed of any new research, teaching, or outreach related to AI, new technologies, and/or its impacts to expand Wharton's footprint in the AI/technology domain. She connects students, academics, and professionals across multiple industries to solve complex, real-world business challenges using machine learning, AI, and big data.

## Research & Insights Team



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## I Context

It is the intent of AI at Wharton to annually produce an outlook on AI Industry adoption. GBK Collective led the inaugural study in 2023 alongside Wharton Professor Stefano Puntoni. This year's study was sponsored by **AI at Wharton**, part of the **Wharton AI and Analytics Initiative** at The Wharton School, University of Pennsylvania; GBK Collective performed research and analysis.



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# EXECUTIVE SUMMARY

# | Abstract

In 2024, Generative AI (Gen AI) entered a new phase, as companies moved beyond initial hype and amazement towards a focus on proving ROI and understanding its performance. Trial of Gen AI surged this year, with 72% of decision-makers reporting uses of Gen AI once a week, compared to 37% in 2023. Increases are pronounced in the functional areas that lagged last year, including Marketing, Operations, and HR. Greater experimentation has shifted sentiment, with more decision-makers feeling “pleased,” “excited,” and “optimistic,” and less “amazed,” “curious,” and “skeptical.” Negative perceptions are also softening slightly, as decision-makers see more promise in Gen AI’s ability to enhance jobs without replacing employees.

Still, companies today are confronted with unanswered questions on what Gen AI can do for them. There is agreement that Gen AI performs well on such tasks as data analysis, idea generation/brainstorming, and legal contract generation, but it is yet to be perceived as “highly impactful” across most functions. The top concerns cited by leaders continue to be accuracy or bias, data privacy, team integration, and ethical issues (though intensity of these barriers has slightly softened from last year).

Looking to the future, Gen AI adoption will enter its next chapter which is likely to be volatile in terms of investment and carry greater privacy and usage restrictions. Enthusiasm projected by new Chief AI Officer (CAIO) role additions and team expansions this year will be tempered by the reality of finding “accountable” ROI. While approximately three out of four industry respondents plan to increase Gen AI budgets next year, the majority expect growth to slow over the longer term, signaling a shift in focus towards making the most effective internal investments and building organizational structures to support sustainable Gen AI implementation. The key to successful adoption of Gen AI will be proper use cases that can scale, and measurable ROI as well as organization structures and cultures that can adapt to the new technology.

# Study Objectives and Methodology

Spurred by the release of ChatGPT, Gen AI has generated a great deal of buzz and press over the past couple of years. While Gen AI has captured the public's fascination, it has also raised debate around its potential impact on commercial enterprises, the makeup of the talent economy, and the future of jobs.

## Objectives

- Take a pulse on where enterprises are on their adoption of Gen AI, build on adoption survey results in 2023
- Assess how Gen AI is, or is expected to be, used overall and within department areas
- Pinpoint the impact that Gen AI has had, and will have, on employees
- Understand key investments and influencers during Gen AI rollout
- Uncover which brands are perceived as leading the way with Gen AI in the enterprise

## Method

- 15-minute online quantitative tracking survey
- United States, with a mix of respondents across regions
- Total number of respondents: 802
- Interviews conducted between July 5 and July 15, 2024

## Audience criteria

- Age 18+
- Enterprise commercial organization (1000+ employees)
- Company based in the US
- Employment requirements:
  - Be a full-time employee
  - Work for a commercial organization (private sector)
  - Roles: Senior Decision Maker in one of the following departments: HR, IT/Business Intelligence, Legal, Marketing/Sales, Operations, Product/Engineering, Purchasing/Procurement, Finance/Accounting, or General Management
  - Not work in Market Research or Advertising sectors

**Gen AI gains momentum as enterprises increase experimentation and invest in proofs of concept in 2024.**



As newness and amazement temper and more companies adopt Gen AI, the dialog has shifted to experimentation and proving ROI.

### 2023: Trial

- 37% reported using Gen AI at least once a week.
- Gen AI spending was predicted to increase 25%.
- Gen AI users were Optimistic, Excited, and many are Impressed but Cautious. Non-Users were mostly Curious and Cautious.
- There was strong optimism for Gen AI adoption: 78% average likelihood of integrating Gen AI across business functions, with top use cases in Data Analysis, Content Creation, and Research & Insights.

### 2024: Experimentation

- 72% report using Gen AI at least once a week.
- Gen AI spending increased by 130% since 2023.
- After 12 months of increased experimentation and usage, Gen AI users are Pleased and Excited, and less Amazed and Curious, along with negative perceptions softening.
- On average, 55% currently use Gen AI across business functions. Of those, 58% rated the performance of these use cases as 'Great'. Users may focus their adoption based on successful trial outcomes.

### 2025+: Adoption & Deployment

- 72% say Gen AI budgets will increase in the next year, most over \$5 million.
- However, a majority (57%) anticipate spending increases to slow (+1 - 10%).
- Slowing growth is perhaps an indicator that enterprises are still searching for the ROI on their initial investment.
- Future focus may be on the right internal investments and organization structures to support Gen AI.

## Key Takeaway

“Our productivity has certainly increased since we started using [Gen AI]. I'm amazed by its power; AI is changing not only my company, it's already changing the world.”

– Tech/Telecom Leader, \$1B - \$2B Annual Revenue

**Gen AI adoption has surged, nearly doubling across functional areas in one year.**

# Gen AI is Widely Used Across Multiple Areas

## How/For What Purposes Gen AI is Currently Being Used (Among Total Respondents)



The top uses for Gen AI include document and proposal writing/editing, data analysis, and document/meeting summarization.

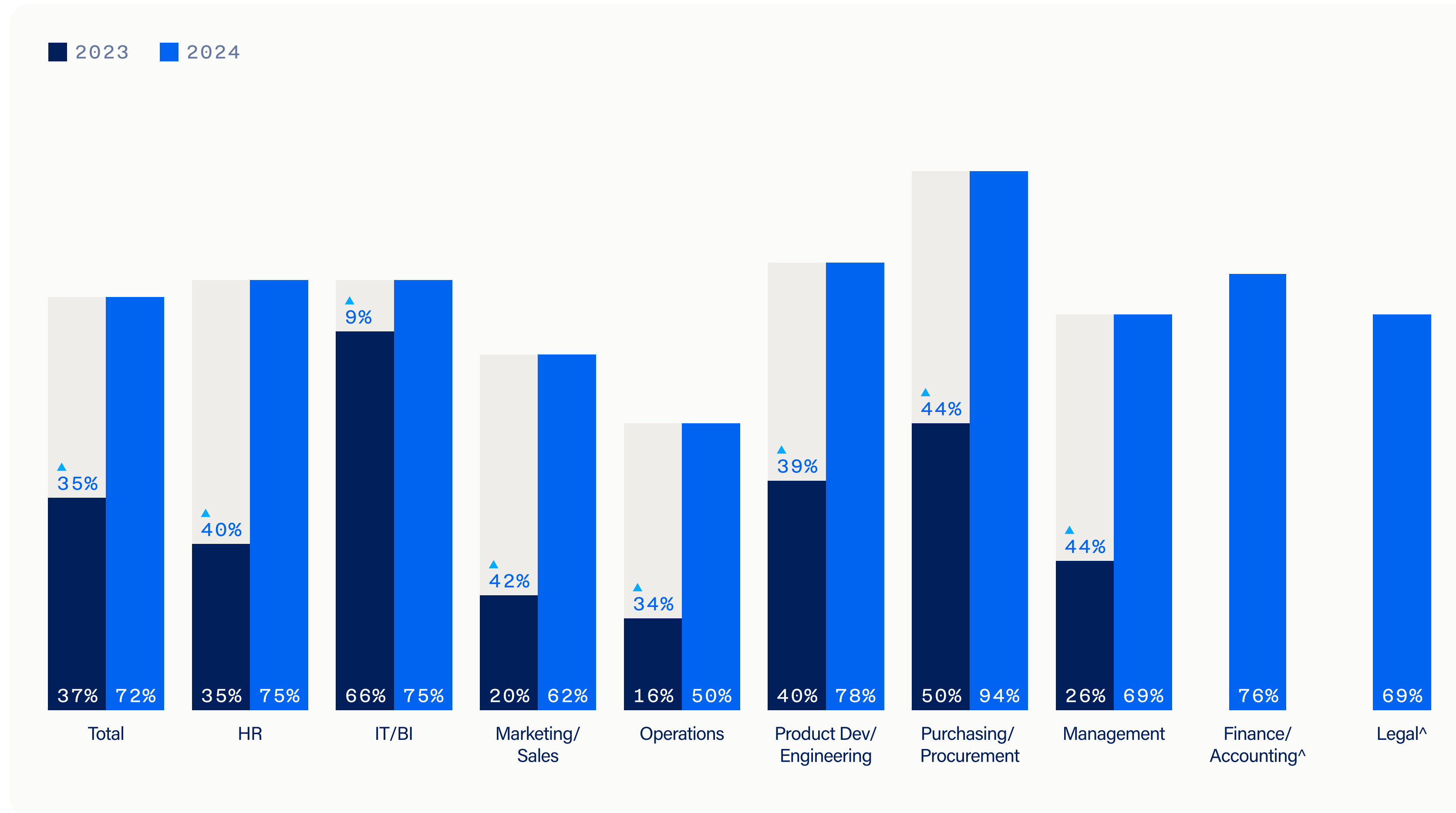
“The biggest impact of Gen AI will be to augment my capabilities. [It will] automate routine tasks and provide 24/7 support to our customers, freeing me up to focus on [customer] empathy and more complex problem-solving.”

- Banking Leader, \$100M - \$250M Annual Revenue

See Executive Summary End Notes for survey question and base sizes.

Growing Up: Navigating Gen AI's Early Years." AI at Wharton in collaboration with GBK Collective, October 2024.

# Usage in the Workplace: Using Gen AI at Least Once a Week



More and more companies are using Gen AI and adoption is now ubiquitous across functions, even the laggard areas of Marketing, Operations, and HR.

“In our marketing department, Gen AI has the biggest impact on creating content and strategy.”  
- Leader in Retail, \$250M - \$1B Annual Revenue

“[Gen AI] can analyze data, write memos, and make recommendations. It will automate many functions of HR [employees]... and may replace searching, sorting through, interviewing, and even recommending candidates.”  
- Leader in HR, \$50M - \$100M Annual Revenue

^Functional areas added to 2024 Survey. See Executive Summary End Notes for survey question and base sizes.

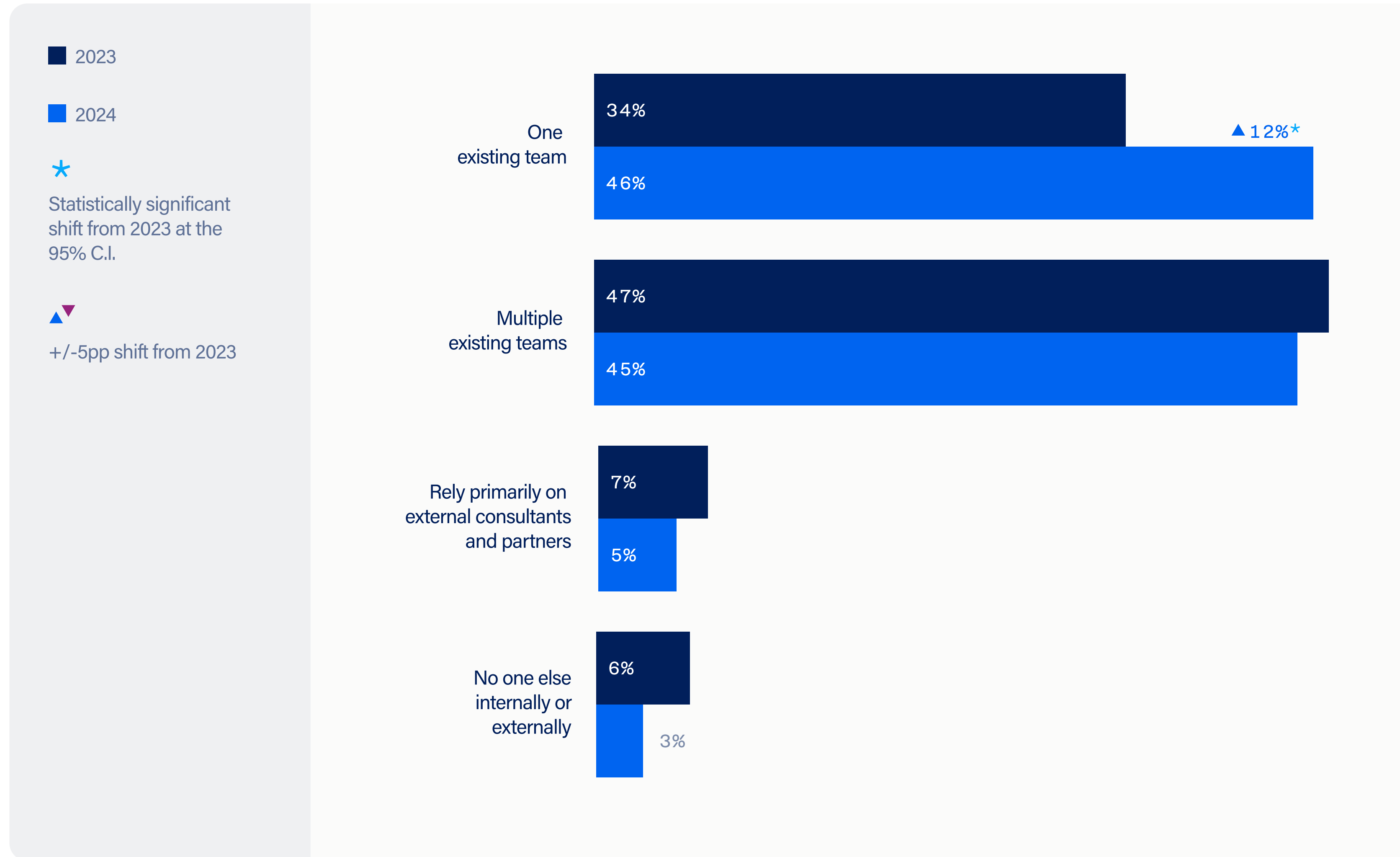
Growing Up: Navigating Gen AI's Early Years." AI at Wharton in collaboration with GBK Collective, October 2024.

# Audiences with notably frequent usage of Gen AI are:

- **Smaller companies** (revenue \$50M to \$250M): **80%**
- **Mid-sized companies** (revenue \$250M to \$2B): **78%**
- **Younger individuals** (ages 18-34): **80%**

**Companies are  
adapting by expanding  
teams and adding  
Chief AI Officer  
(CAIO) roles.**

# Gen AI Strategy is Led Internally—Not by Consultants



Gen AI strategy responsibilities are being kept in-house across different sized teams.

See Executive Summary End Notes for survey question and base sizes.

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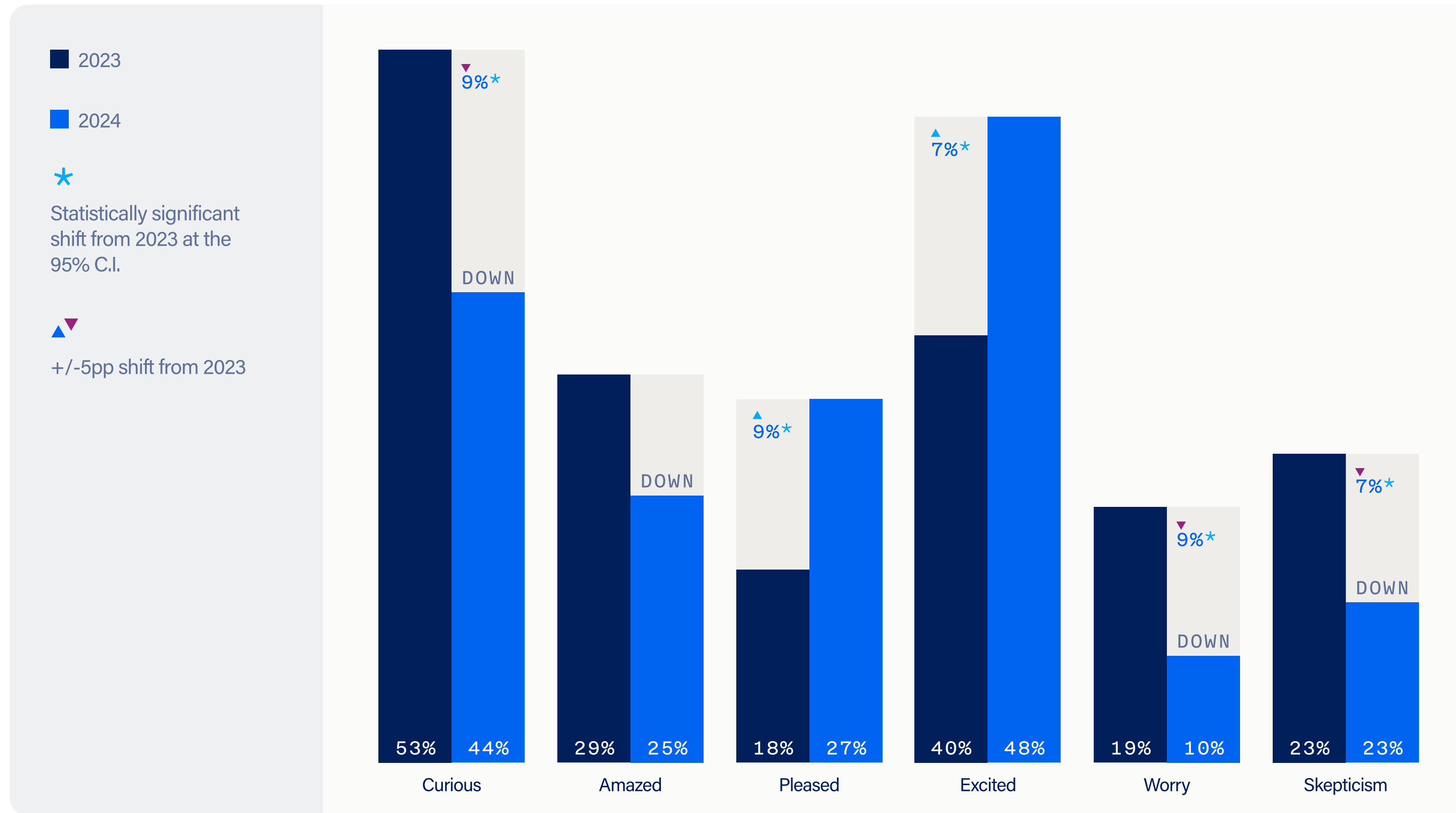
# Chief AI Officers (CAIO) are now in 46% of companies:

- **Large companies** (revenue \$2B+): 41%
- **Mid-sized companies** (revenue \$250M to \$2B): 48%
- **Small companies** (revenue \$50M to \$250M): 49%



**Views of Gen AI have evolved since 2023, with greater acceptance that Gen AI will lead to greater productivity.**

# Business Leaders' Excitement Around Generative AI Grows in 2024, While Concerns Decrease



"Amazement" and "Curiosity" about Gen AI have decreased since 2023, and more people indicate being "Pleased" and "Excited" about it. Negative perceptions are softening slightly, as decision-makers see more promise in Gen AI's ability to enhance jobs (without replacing employees).

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# Leaders View Gen AI as Positively Impacting Employee Skills

2023

80%

Enhance employees' skills in some tasks

75%

Replace employees' skills in some tasks

2024

90%

Enhance employees' skills in some tasks

72%

Replace employees' skills in some tasks

Compared to last year, decision-makers see more promise in Gen AI's ability (**up a statistically significant 10%**) to enhance jobs without replacing them.

“AI will not replace people for certain jobs, but rather enhance employee output... eliminate human error, and improve overall quality.”

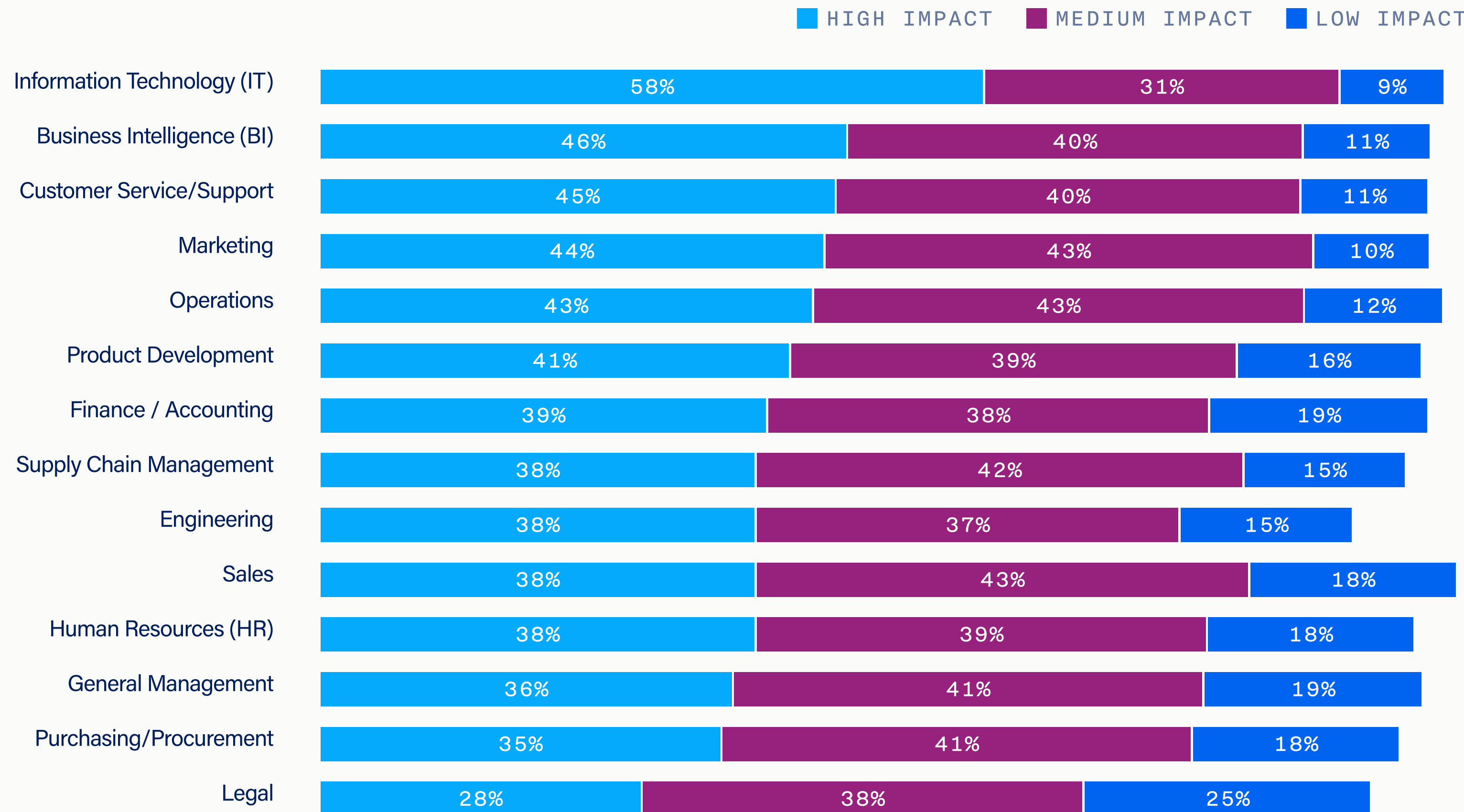
- Automotive Leader, \$2B+ Annual Revenue

See Executive Summary End Notes for survey question and base sizes.

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**Most agree Gen AI is having an impact—though not yet an overwhelming impact.**

# Most Leaders Think Gen AI is Having a Positive Impact



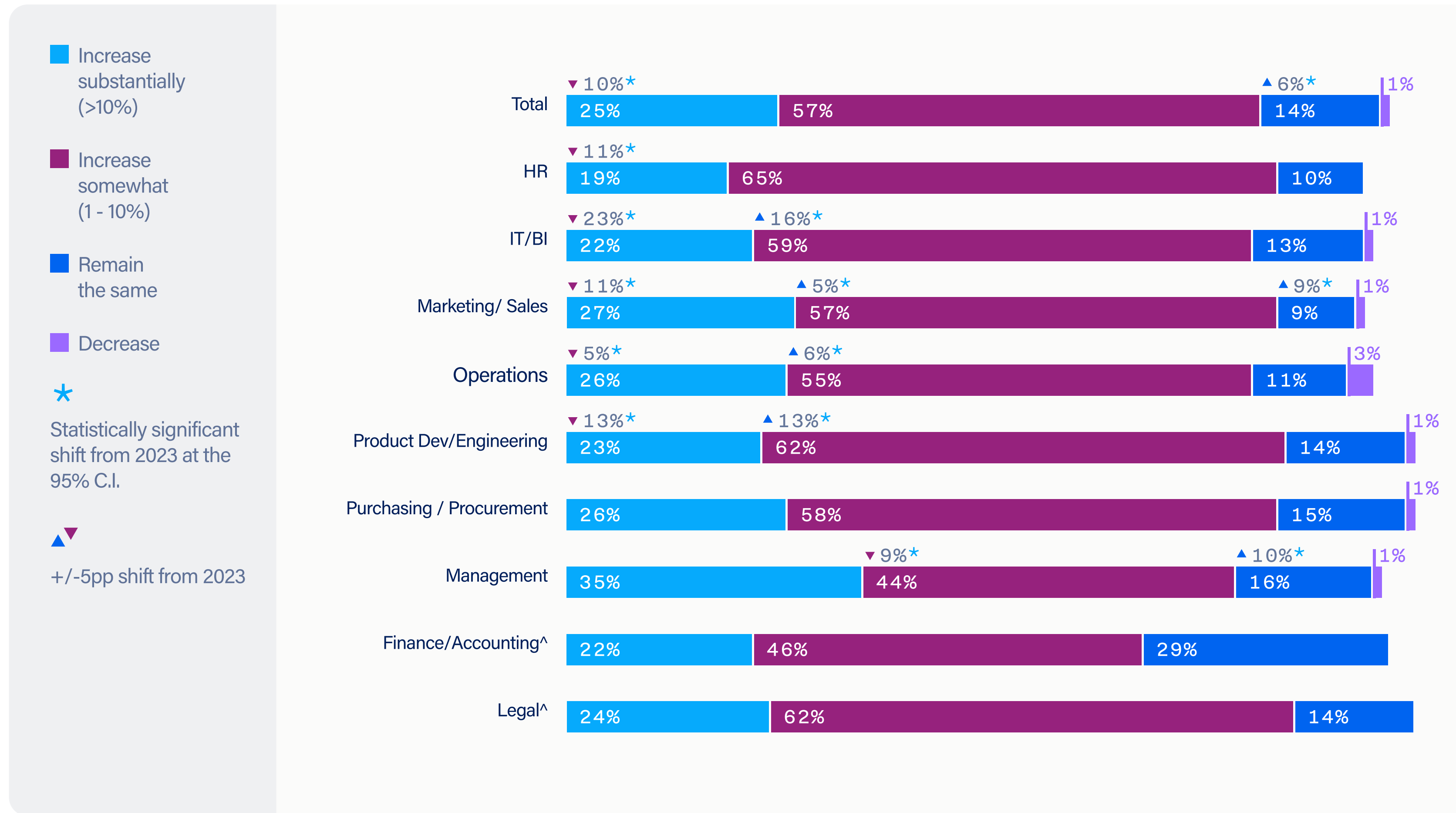
Companies today are confronted with unanswered questions on what Gen AI can do for them. There is agreement that Gen AI is impactful, but it's yet to be perceived as "highly impactful" in most areas. **IT is the exception, where a majority (58%) believe it is highly impactful.**

Does not include "I'm not sure/NA", hence displayed data does not sum to 100%. See Executive Summary End Notes for survey question and base sizes.

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**Investment will continue to increase over the next 2 to 5 years, but at a slower pace.**

# Gen AI Budget Investment to Rise Across All Functional Areas Over the Next 2-5 Years



Percentage increases in investment across functional areas, while still large, are slowing compared to last year.

Certain functions predict steadier fiscal investments with **IT/BI, Marketing, Operations, and Product/Engineering** predicting budgets increasing somewhat or remaining the same.

^Functional areas added in 2024. Does not include "Not sure", hence displayed data does not sum to 100%. "See Executive Summary End Notes for survey question and base sizes.

Growing Up: Navigating Gen AI's Early Years." AI at Wharton in collaboration with GBK Collective, October 2024.

## Key Takeaway

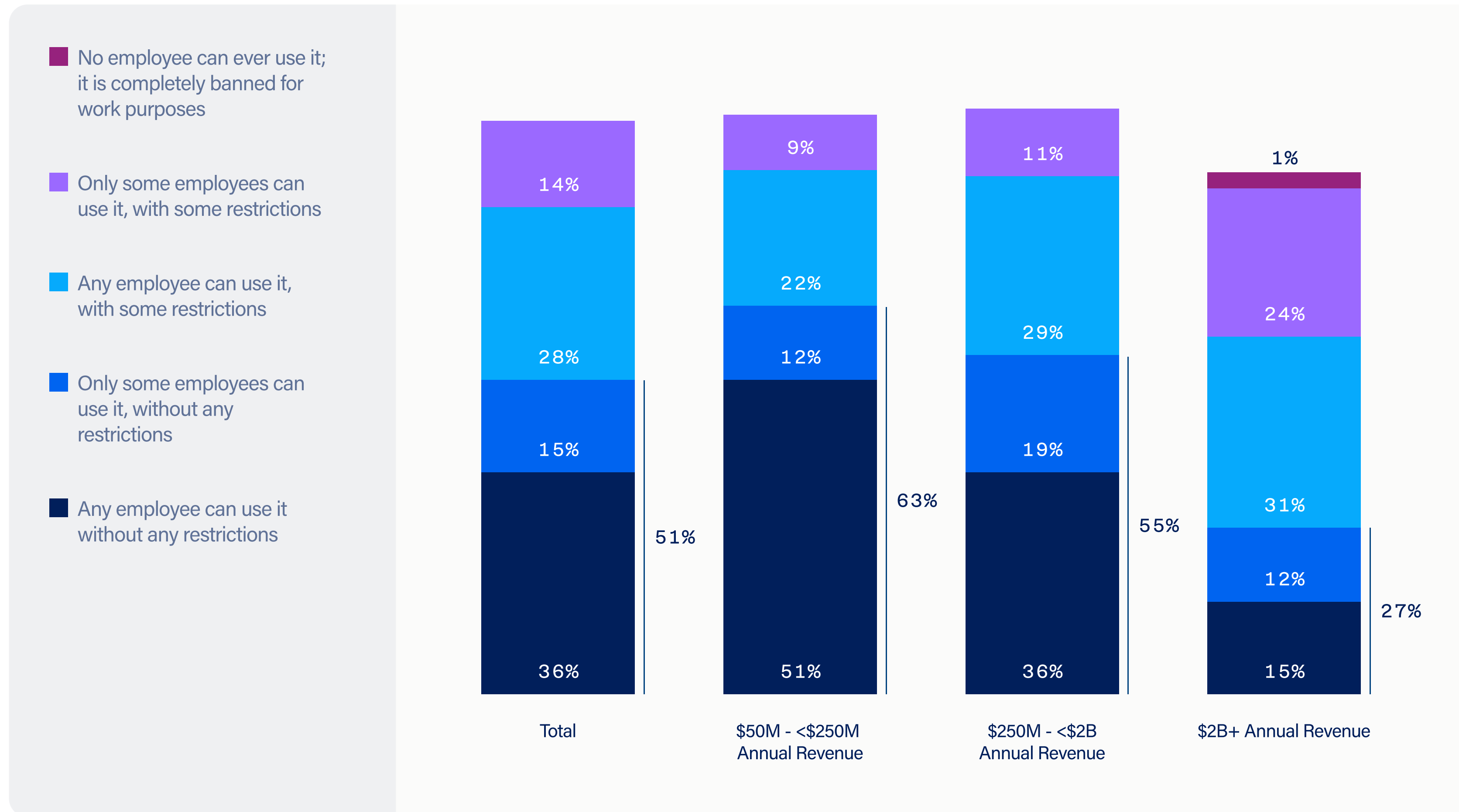
“I hope people become much less afraid of AI. I’m quite optimistic about future applications. At the same time, specific regulations need to be in place [for] safety, security, and ethical creation.”

– Retail Leader, \$250M - \$1B Annual Revenue

**For now, uniform or stringent usage policies on Gen AI practices in the workplace have not emerged.**



# About Half of Enterprises Have Few or No Restrictions on Gen AI Usage



About half surveyed have **few or no restrictions of usage at work (51%)** – however more restrictions exist the larger the organization size. **Only 15% of \$2B+ annual revenue enterprises allow use without any restrictions.**

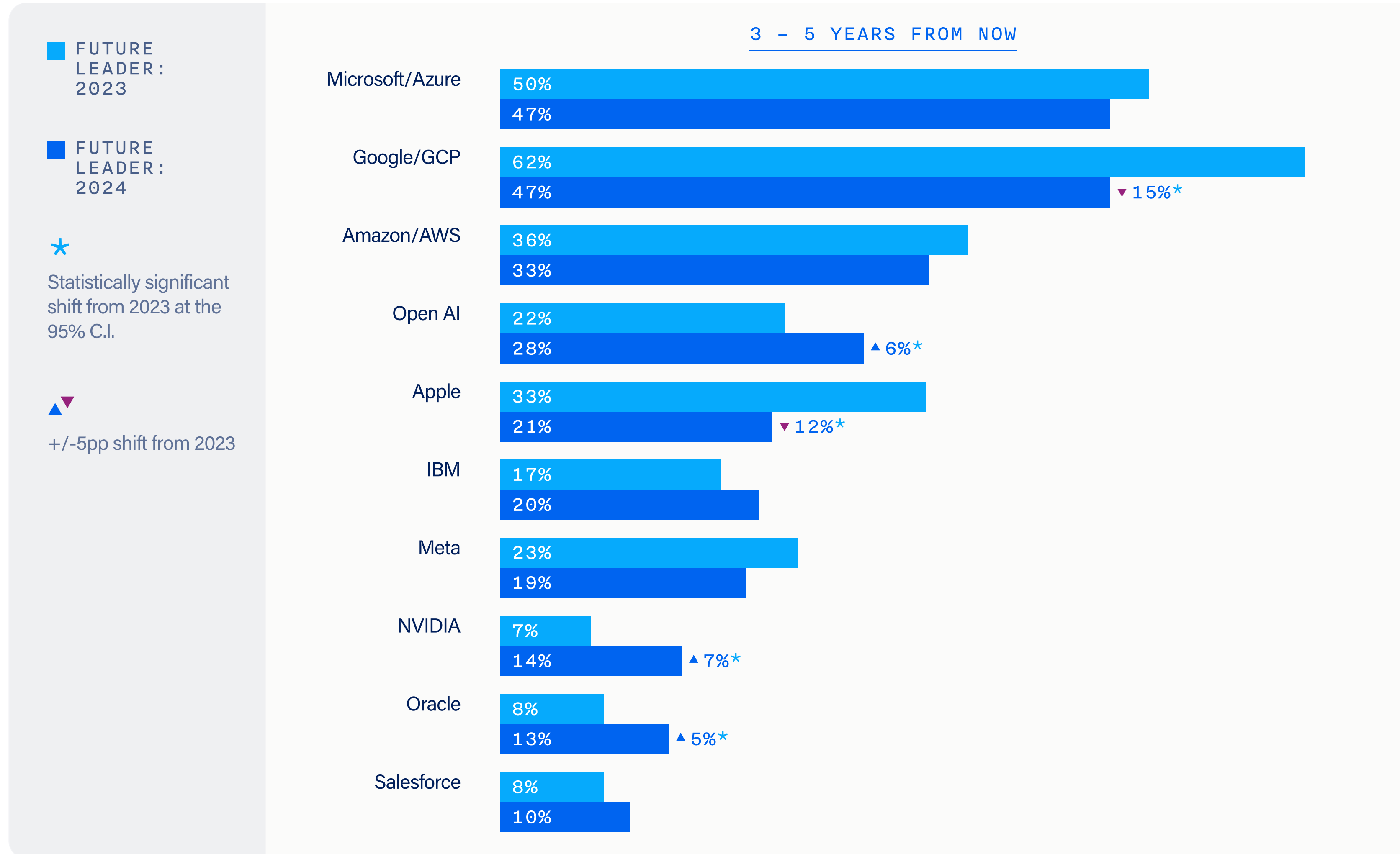
\$2B+ annual revenue enterprises may see additional risks that require additional scrutiny.

See Executive Summary End Notes for survey question and base sizes.

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**AI market leadership is in flux, but Microsoft and Google continue to be seen as leaders now and in the future.**

# Perceptions of AI Vendors is in Flux



- Microsoft, Google, Amazon, and OpenAI are expected to lead in Gen AI for the next three to five years.
- Google and Apple have lost perception share as current and future leaders.

Not every brand measured is displayed, hence displayed data does not sum to 100%. See Executive Summary End Notes for survey question and base sizes.

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## ■ What Comes Next?

**Continued usage of Gen AI will signal areas of opportunity—but it will also likely highlight the technology’s weak points.** Companies are incentivized to find effective and efficient use cases of Gen AI, but will require a learning curve to figure out how to mitigate the risks this technology poses, particularly those around data privacy, security risks, biases (the strong barriers against adoption today).

**The most successful Gen AI applications and use cases will see higher adoption in the areas of knowledge documentation, fraud, and brainstorming.** Today, Gen AI receives the highest performance scores for data analysis/analytics, idea generation/brainstorming, legal contract generation, fraud detection, and email generation. It is in these niche areas where the proliferation of products for Gen AI most likely will occur.

**More defined usage policies are needed.** For now, there are no uniform or stringent usage policies on Gen AI practices in the workplace—but this is something to watch for in the coming years as the technology becomes more ubiquitous across functional areas.

**While many predict that Microsoft and Google will remain the enterprise leaders, the mantle is anyone’s for the taking.** With continued investment and increases in capabilities, it is possible that any of the top five leaders can outperform them.

## Key Takeaways and Recommendations

**Gen AI is still in the early phase.** As with previous major advances in technologies (e.g., PCs, the Internet), Gen AI is currently being used to improve the efficiencies of business processes. It takes time for companies and industries to fully take advantage of the new tools, assess the right tools and platforms, and re-engineer their processes and develop new capabilities based on the new tech.

**Short-term investment may be cooling, but this is not to be seen as a lack of interest.** Investment in Gen AI remains strong, signaling that while maybe not immediately, many industries are preparing to embrace a world in which Gen AI plays a big role.

**Remain vigilant, continue experimenting, watch for major developments, and be ready to follow quickly with investment as successful use cases become known.** The companies that are prepared to pivot to Gen AI when the technology matures are going to be more competitive and agile. Companies that aren't treating this as a transformative technology could be caught flat-footed.

**Have an open mind on which vendors are the best on Gen AI because best may soon be relative.** Microsoft and OpenAI still appear to carry a first-mover advantage in decision-makers' minds. However, as Gen AI develops past the experimentation phase, other providers (including lesser-known players) will start to specialize their capabilities within certain industries or use cases. It's not hard to imagine providers diverging to claim an edge in niche areas.

# Executive Summary

## End Notes

Page 09 Q8. Please indicate whether your organization uses or intends to use Gen AI for the following areas. - Currently use (Note: Response options updated in 2024) Total: 2024 (n=802)

Page 10 Q2. What is your experience using Gen AI for work purposes? (Note: Question wording updated in 2024) Total: 2024 (n=802), 2023 (n=672)

Page 13 Q18. Who in your organization is currently responsible for your Gen AI strategy? Total: 2024 (n=802), 2023 (n=672)

Page 16 Q3A/Q3B. Which (if any) of the words below describes your perception of Gen AI as it stands today? Total: 2024 (n=802), 2023 (n=672)

Page 17 Q6. What is your level of agreement with the following statements regarding the current impact of Gen AI on your organization? - Strongly/somewhat agree Total: 2024 (n=802), 2023 (n=672)

Page 19 Q5. How strong of an impact is Gen AI having on each of the following functions or departments within your organization? Total: 2024 (n=802)

Page 21 QSP5. Do you anticipate your organization's spending on Gen AI, 2-5 years from now, to increase, decrease, or remain the same? "Not sure" (<1%) data points not shown. Total (n=802), HR (n=91), IT/BI (n=92), Marketing/Sales (n=89), Operations (n=92), Product development/Engineering (n=92), Purchasing (n=102), General Management (n=75), Finance/Accounting (n=91), Legal (n=78)

Page 23 Q2A. Which best describes your current organization's policy for Gen AI for work purposes? (Note: New question in 2024) Total: 2024 (n=802), \$50 million - less than \$250 million in annual revenue (n=211), \$250 million - less than \$2 billion in annual revenue (n=421), \$2 billion or more in annual revenue (n=170) Not shown in chart: Those answering "other," "don't know," or never used Gen AI.

Page 25 Q13B. Which of the following companies do you expect to be the leaders in Gen AI in the next 3-5 years? Total: 2024 (n=802), 2023 (n=652)

# DETAILED FINDINGS: **CURRENT ADOPTION & USAGE POLICIES**

## Key Findings on Adoption & Usage Policies

**Closing the knowledge and familiarity gaps:** The knowledge gap closes as more decision-makers familiarize themselves with Gen AI. Knowledge of Gen AI has increased +23 percentage points overall since last year. Increases are seen across functional areas, though particularly in Marketing/Sales (+49 percentage points)—the functional area faring lowest on knowledge and familiarity in 2023.

**Usage is heightened:** Overall usage of Gen AI is up across the board, particularly in areas of HR, Purchasing/Procurement, Product/Engineering, and Marketing. Adoption of Gen AI has sharply increased in these areas almost matching adoption rates within IT/Business Intelligence.

**Not yet a revolution:** While Gen AI investment continues to grow in 2024, many organizations are cautiously awaiting more concrete evidence of its transformative power and ability to tilt the scales on ROI. When asked whether Gen AI is having a high, moderate, or low impact on their business, most decision-makers perceive that it is having a low-to-moderate impact across functional areas (except for IT/Business Intelligence, where 58% believe it is having a strong impact).

**Limited restrictions:** Usage of Gen AI within companies appears encouraged as most decision-makers do not (yet) face access or usage restrictions. About half surveyed have little to no restrictions of at work usage (51%)—however more restrictions exist the larger the organization size possibly due to additional risk factors and internal decision-making processes.



# Gen AI is Widely Used Across Multiple Areas

## How/For What Purposes Gen AI is Currently Being Used (Among Total)



The top uses for Gen AI include document and proposal writing/editing, data analysis, and document/meeting summarization.

Q8. Please indicate whether your organization uses or intends to use Gen AI for the following areas. - Currently use (Note: Response options updated in 2024) 2024 (n=802)

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# Knowledge and Familiarity of Gen AI is Increasing—Overall and Among Functional Areas

**Knowledge and Familiarity with Gen AI by Functional Area**  
(Among Total, Showing “Expert/At Least Somewhat Familiar”)



- Knowledge of Gen AI has increased from last year by **+23 percentage points overall**, demonstrating that business leaders have spent the last year becoming more familiar with and deepening their understanding of the technology.
- Marketing, Procurement, and HR see the largest increases over last year (**+49 percentage points, +36 percentage points, +31 percentage points**)

Q1. Which best describes your personal knowledge and familiarity with Gen AI? Total: 2024 (n=802), 2023 (n=672)

^ Functional areas added to 2024 Survey

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# Late Adopters in 2023 Are Catching Up

Usage in Workplace - Using Gen AI at Least Once a Week (Among Total)



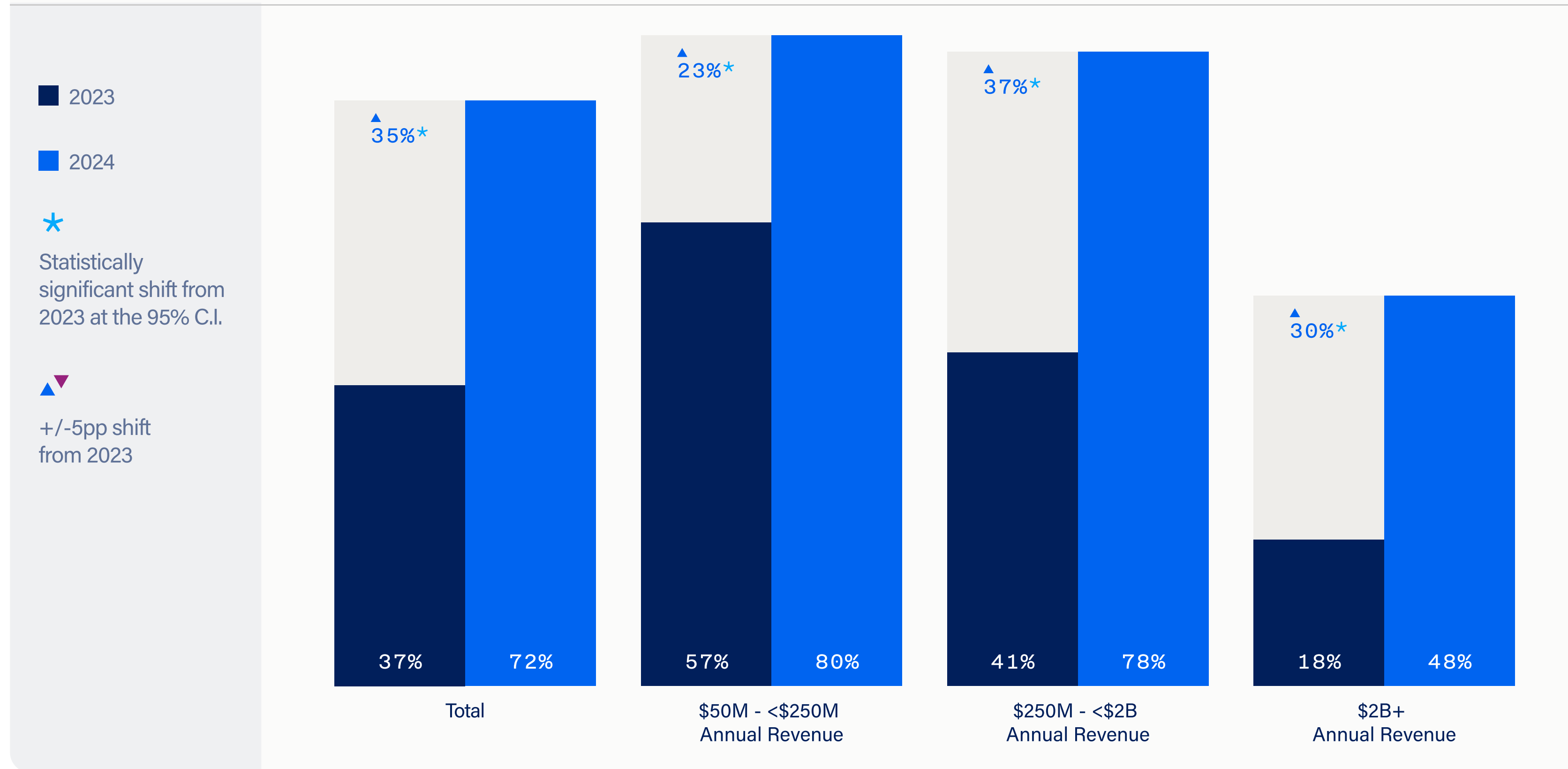
- While IT/Business Intelligence were early adopters last year, Gen AI usage is up across the board with **most functional areas at 70% usage or higher.**
- Leading areas are Purchasing/Procurement, Product/Engineering, IT/BI, and HR.
- Largest increases are in Purchasing, HR, General Management, Product/Engineering, and Marketing.

Q2. What is your experience using Gen AI for work purposes? (Note: Question wording updated in 2024)  
 Total: 2024 (n=802), 2023 (n=672)  
 ^ Functional areas added to 2024 Survey

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# Gen AI Impact Usage is Greatest Among Smaller Enterprises, with Larger Enterprises Showing Less Frequent Usage

Usage in Workplace - Using Gen AI at Least Once a Week by Company Size (Revenue in USD) (Among Total)



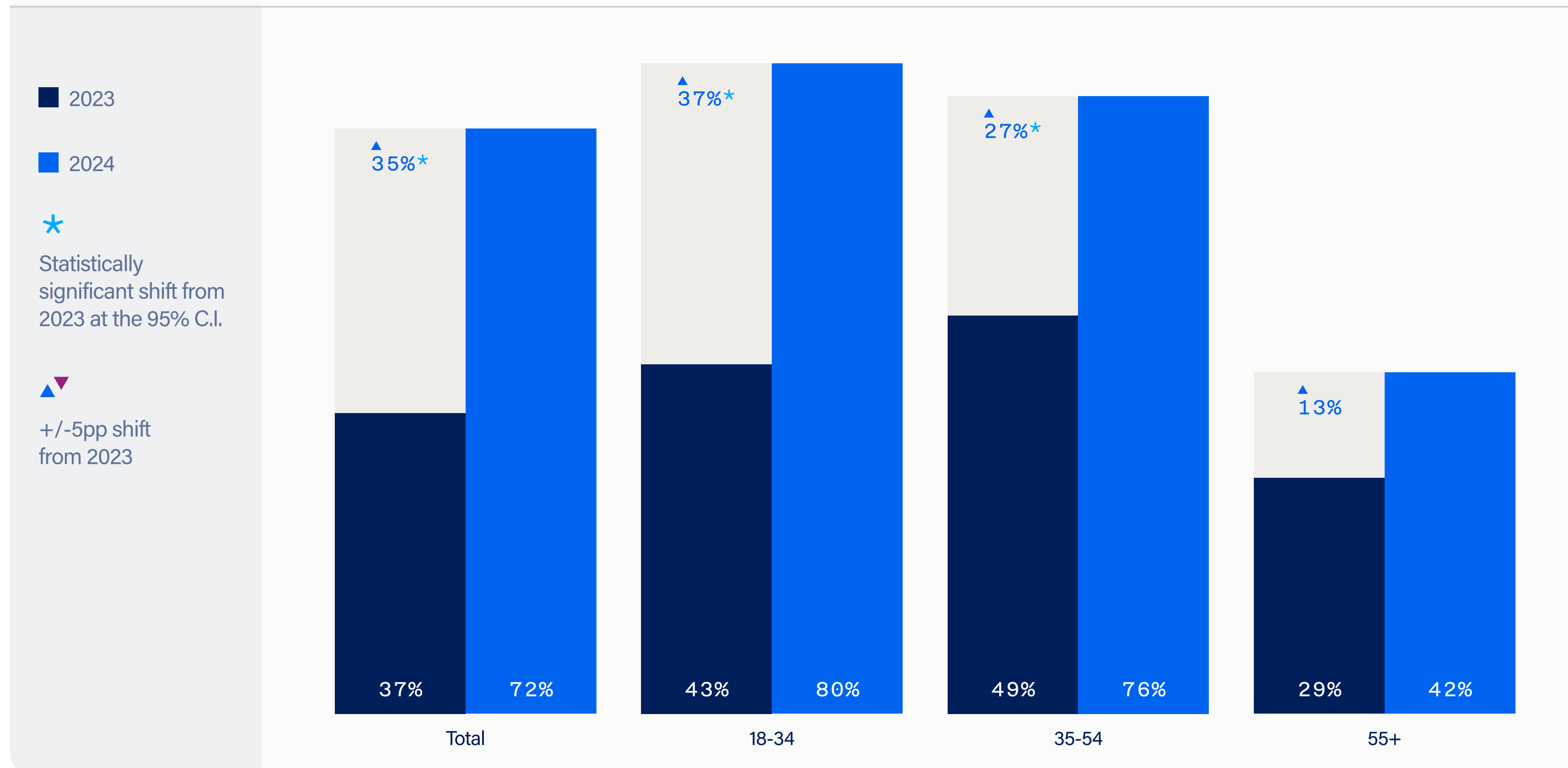
- Decision-makers at smaller enterprises (<2,500 FTE/\$250M) continue reporting higher usage this year, with **80% (an increase of 23 percentage points)** using Gen AI at least once per week. Usage is much lower in the largest enterprises (\$2B+)
- This finding may be due to smaller enterprises' agility to change tools and adjust processes faster, or that they may face greater pressure to realize the efficiency gains available with Gen AI.

Q2. What is your experience using Gen AI for work purposes? (Note: Question wording updated in 2024)  
 Total: 2024 (n=802), 2023 (n=672)

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# Regular Usage Among All Ages is Up, but Adoption is Greater Among Younger Audiences

Usage in Workplace - Using Gen AI at Least Once a Week by Age  
(Among Total)



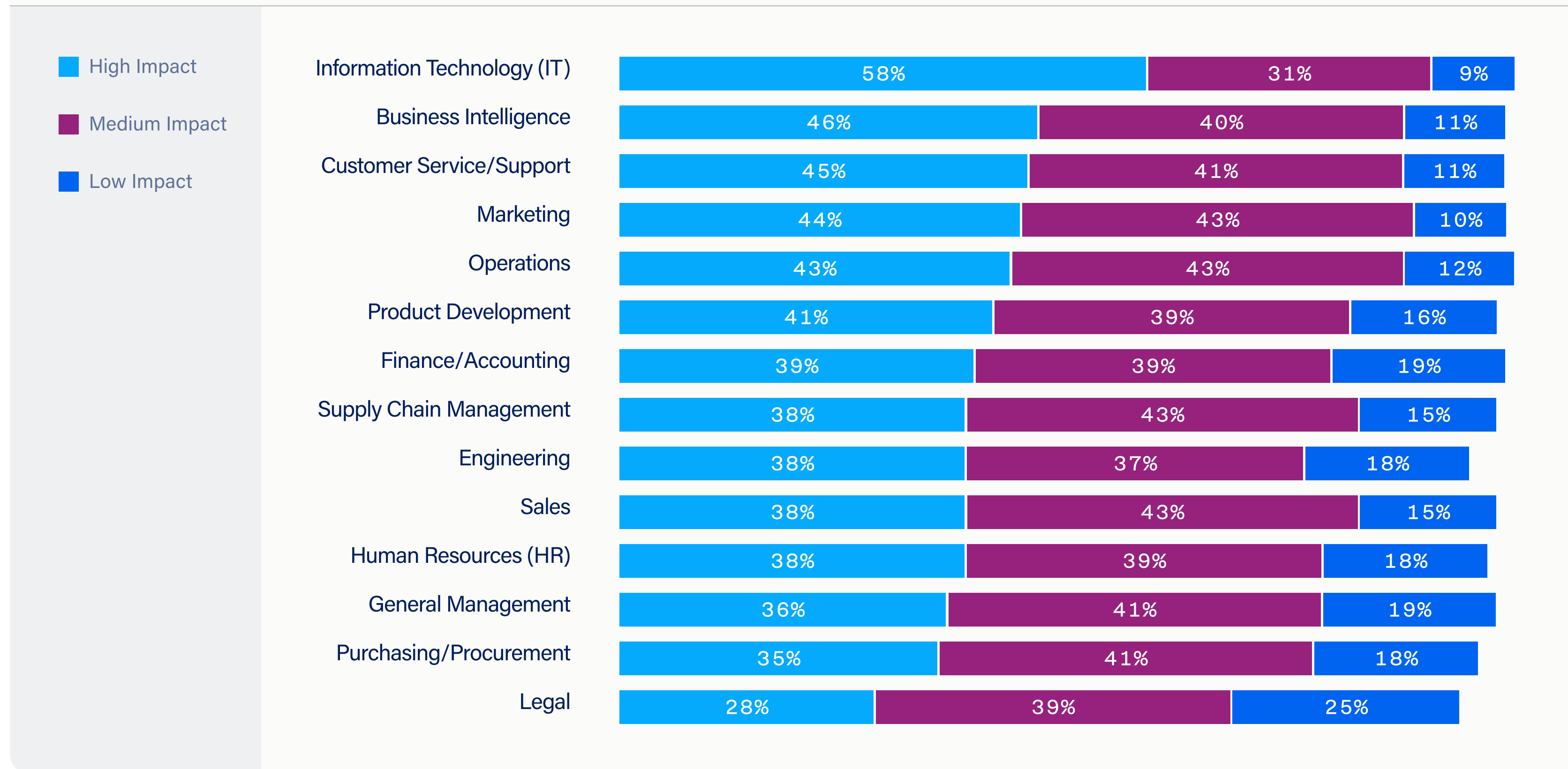
- Over the last year, people under the age of 55 are adopting Gen AI at higher rates.
- **20% of those aged 55+** reported they "never have used" Gen AI, or do not use it currently.

Q2. What is your experience using Gen AI for work purposes? (Note: Question wording updated in 2024)  
Total: 2024 (n=802), 2023 (n=672)

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# Decision-Makers Think Gen AI is Impactful - Though Not Yet Strongly Impactful Everywhere

**Expected Impact Across Functional Areas**  
(Among Total)



Despite growth in usage across functions, less than half of decision-makers think Gen AI is having a high impact on any functional area. **IT is the exception, where a majority (58%) believe it is highly impactful.**

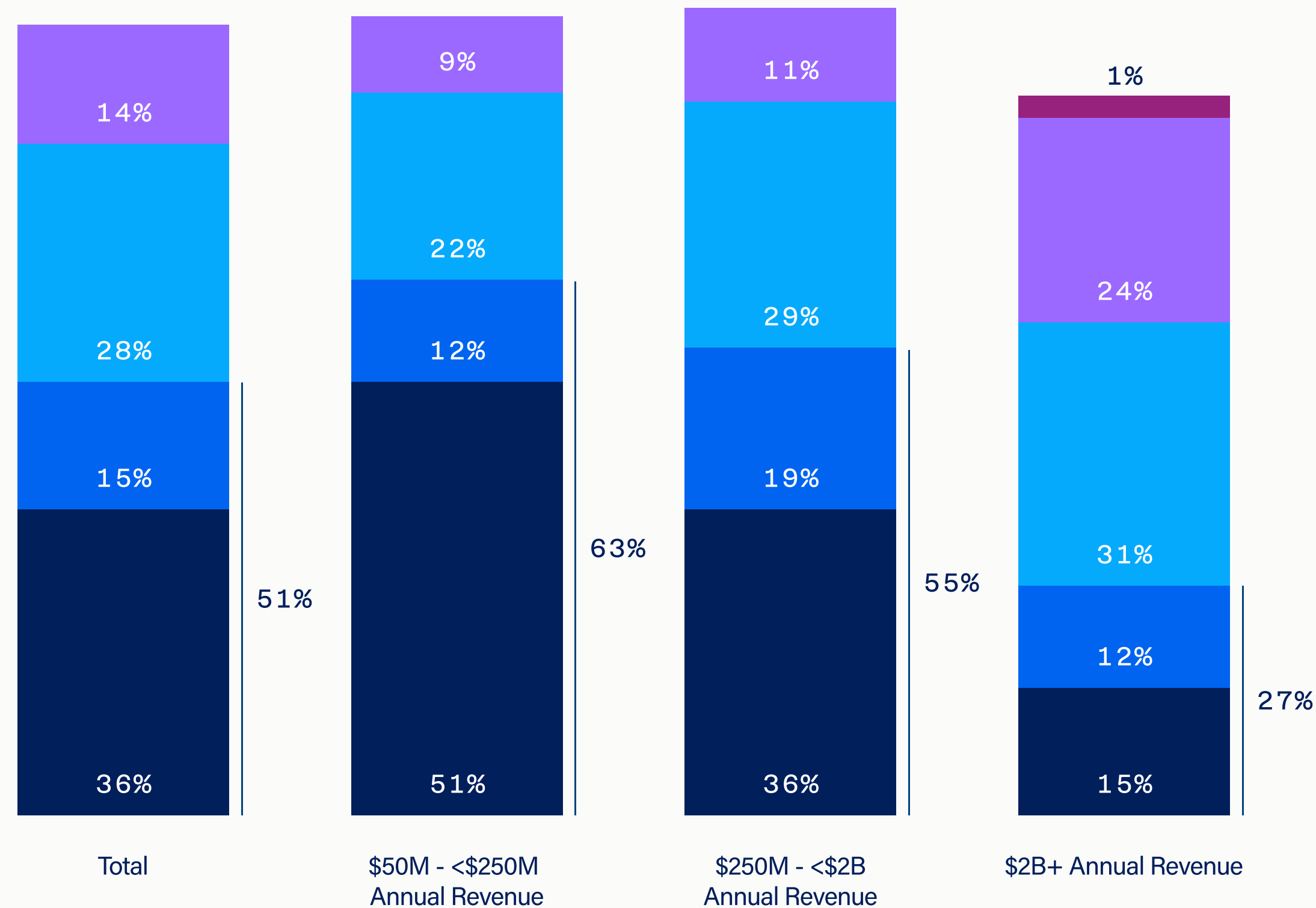
Q5. How strong of an impact is GenAI having on each of the following functions or departments within your organization?  
Total: 2024(n=802)  
Does not include "I'm not sure/NA", hence displayed data does not sum to 100%.

Growing Up: Navigating Gen AI's Early Years." AI at Wharton in collaboration with GBK Collective, October 2024.

# Most Employees Do Not Face Heavy Restrictions in Accessing Gen AI at Their Companies

## Usage Restrictions (Among Total)

- No employee can ever use it; it is completely banned for work purposes
- Only some employees can use it, with some restrictions
- Any employee can use it, with some restrictions
- Only some employees can use it, without any restrictions
- Any employee can use it without any restrictions



About half surveyed have **little to no restrictions of usage at work (51%)** – however more restrictions exist the larger the organization size (“Without any restrictions” 15% at \$2b+).

Larger companies may find additional risk that that requires additional scrutiny.

Q2A. Which best describes your current organization’s policy for Gen AI for work purposes? (Note: New question in 2024)  
 Total: 2024 (n=802), \$50 million - less than \$250 million (n=211), \$250 million - less than \$2 billion (n=421), \$2 billion or more (n=170)  
 Not shown in chart: Those answering “other,” “don’t know,” or “never used Gen AI”

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**Restrictions and usage policies vary by size of company.**



# Restrictions are More Common Among Larger Enterprises

**Usage Policy Adoption**  
(Among Total)

	Total	\$50M - <\$250M Annual Revenue	\$250M - <\$2B Annual Revenue	\$2B+ Annual Revenue
Compliance with regulatory standards	59%	57%	60%	59%
Usage restrictions for sensitive tasks/employees/subject matter	56%	52%	57%	58%
Data security policies	55%	49%	53%	68%
Employee training and awareness programs	54%	60%	50%	59%
Explicit approval process for usage	52%	54%	53%	47%
No formal policies in place	6%	6%	6%	8%

The largest companies (revenue \$2B+) had have higher adoption of policies on employee training and data security.

QAP1. What types of Gen AI usage policies does your organization have in place? (Note: New question in 2024)  
Total: 2024(n=802), \$50 million - less than \$250 million (n=211), \$250 million - less than \$2 billion (n=421), \$2 billion or more (n=170)

Growing Up: Navigating Gen AI's Early Years." AI at Wharton in collaboration with GBK Collective, October 2024.

# Many Enterprises Lack Gen AI Policies & Guidelines

## Responsible AI Policy Adoption (Among Total)

	Total	\$50M - <\$250M Annual Revenue	\$250M - <\$2B Annual Revenue	\$2B+ Annual Revenue
Data privacy preservation	53%	50%	50%	63%
Human oversight and intervention	45%	43%	47%	41%
Ethical guidelines for AI usage	43%	37%	42%	54%
Transparency and explainability	41%	45%	40%	38%
Intellectual property rights	41%	34%	43%	43%
Fairness and bias mitigation	37%	42%	36%	32%
Accountability and governance	35%	31%	35%	40%
Inclusivity and diversity in AI development	27%	31%	25%	26%
Monitoring and auditing AI outputs	27%	22%	25%	35%
Sustainability and environmental impact	24%	22%	27%	19%
No formal policies in place	4%	3%	4%	6%

- Despite double-digit increases in Gen AI usage, many enterprises lack guardrails.
- The lack of usage and policy adoption potentially sends a mixed message in terms of leaderships' trust and clarity in what an increased investment in Gen AI means for their firms.
- The largest enterprises (revenue \$2B+) have more guardrails than smaller organizations.

QAP2. What types of responsible AI policies does your organization have in place for Gen AI?  
(Note: New question in 2024)  
Total: 2024(n=802), \$50 million - less than \$250 million (n=211), \$250 million - less than \$2 billion (n=421), \$2 billion or more (n=170)

Growing Up: Navigating Gen AI's Early Years." AI at Wharton in collaboration with GBK Collective, October 2024.

# DETAILED FINDINGS: **INVESTMENTS & INTERNAL STRATEGY**

## Key Findings on Investment & Internal Strategy

**Short-term budget boom continues.** The average expenditure has skyrocketed from \$4.5M in 2023 to \$10.3M in 2024. Investments in Gen AI are seen in technology/tools/systems, training, consultants, and hiring.

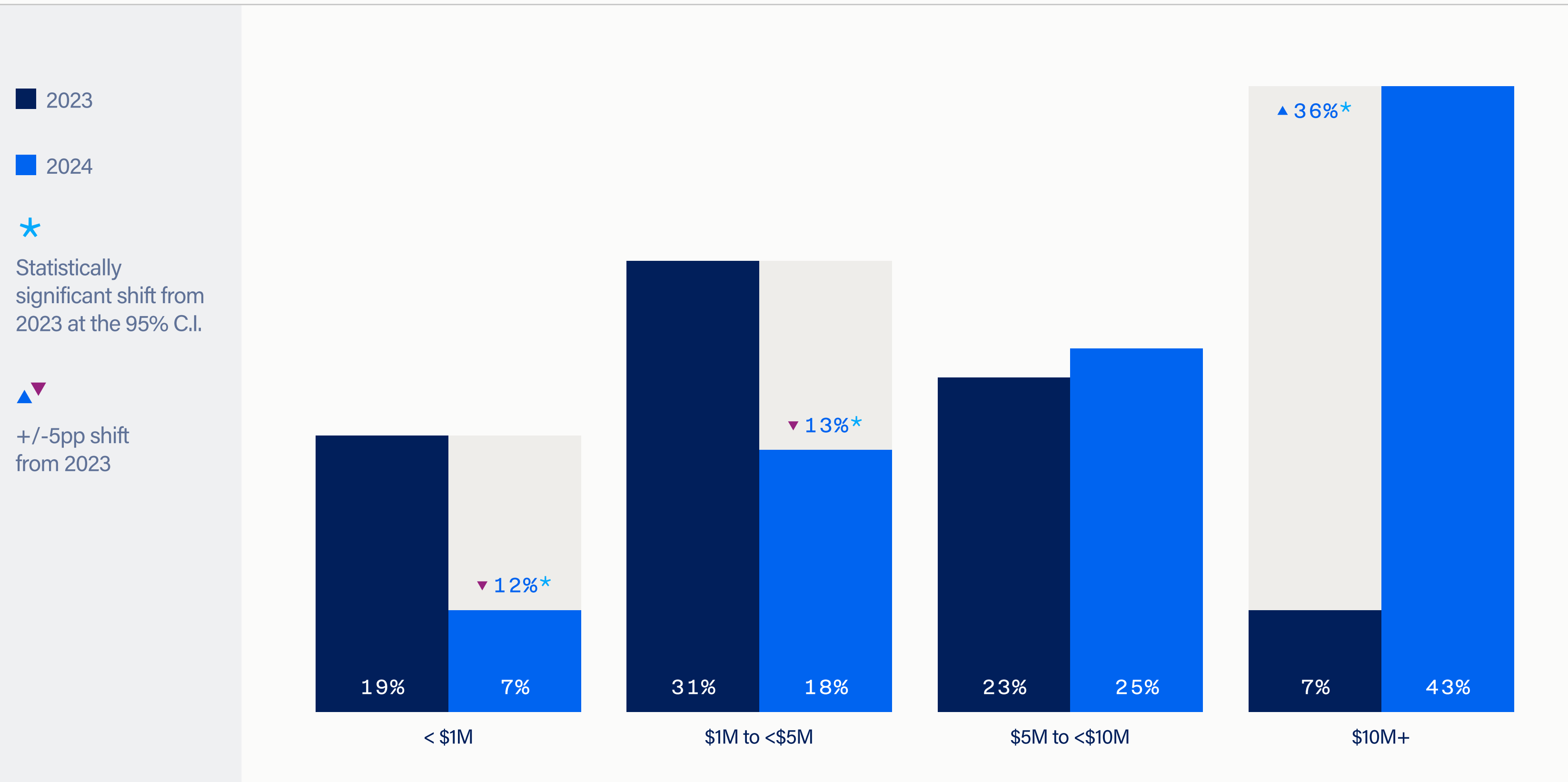
**Future spending is increasing, but at a slower pace.** Looking 2 to 5 years out, the majority of firms (57%) anticipate increasing spending between 1 and 10%, a reduction over last year. This slowing pace is perhaps an indicator that enterprises are still searching for the ROI on their initial investment.

**Investment in training is more muted.** Training—still seen as a key internal strategy in rolling out Gen AI—is down from last year, seeming to indicate a more conservative investment posture. This may also indicate a “wait-and-see” mentality where firms seek to validate the utility of Gen AI before making sweeping internal investments in getting employees on board.

**Enterprises are making organizational changes to adjust to Gen AI.** More than 45% of companies report single or multiple internal teams tasked with Gen AI strategy, and 64% of companies without a team are considering forming one. Among those with internal teams, 80% are comprised of 10 or more employees. Nearly half (46%) have a Chief AI Officer.

# Enterprise Spending on Gen AI Has More Than Doubled Since 2023

**Organizational Gen AI Budgets**  
(Among Total)



The average investment in Gen AI has **increased 2.3 times**, with enterprises spending \$10.3M compared to \$4.5M last year.

Compared to other functions Finance (**63%**), Purchasing (**55%**), and Legal (**54%**) spent had the highest budgets (**\$10+M**)

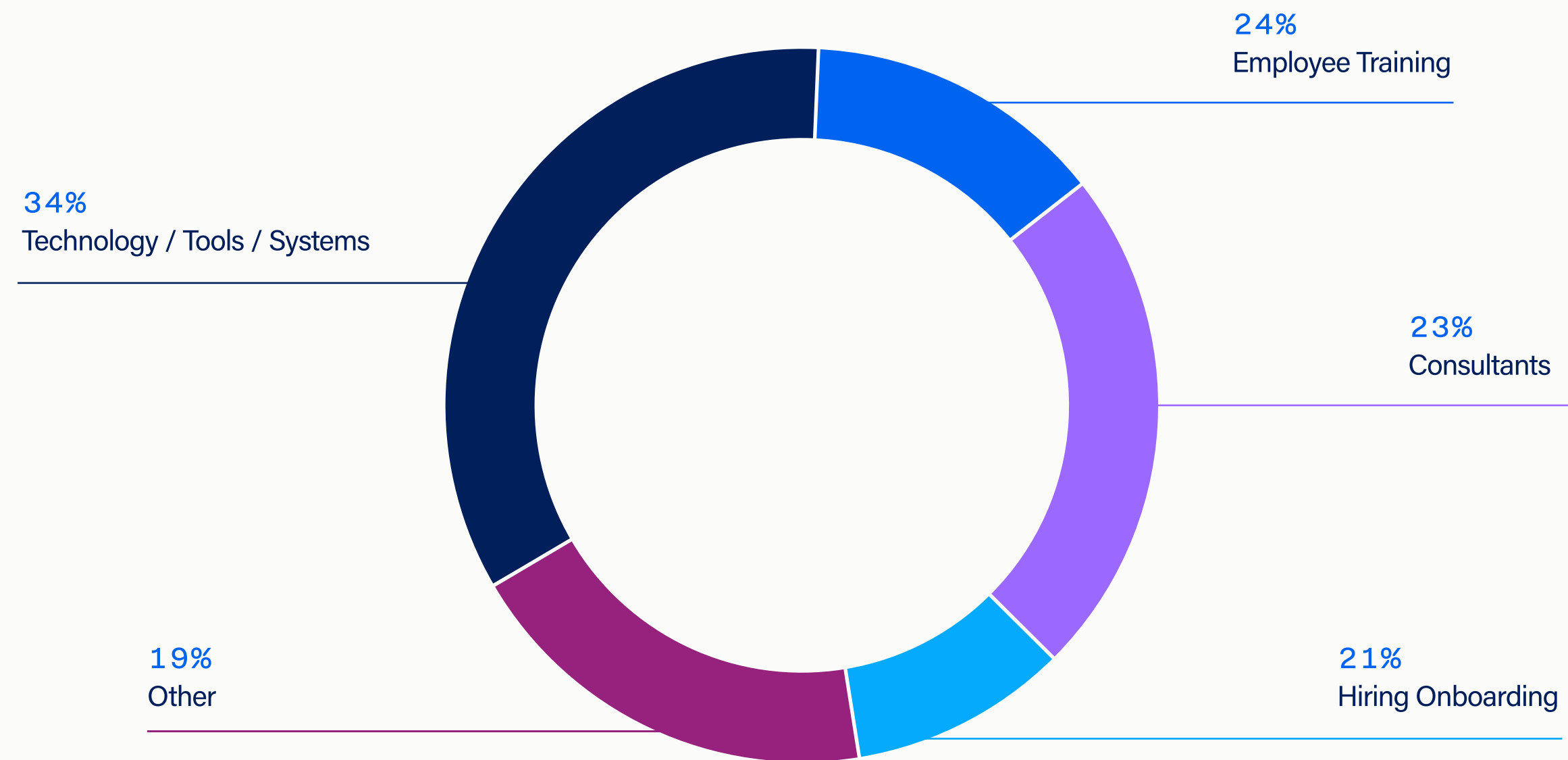
QSP1. What is your organization's approximate budget for Gen AI solutions and related services? (Note: Question wording updated in 2024)

Total: 2024 (n=802), 2023 (n=672)

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# Enterprise Spending on Gen AI Currently Focuses on Training, Consulting, and Onboarding

**Budget Breakout**  
(Among Total)



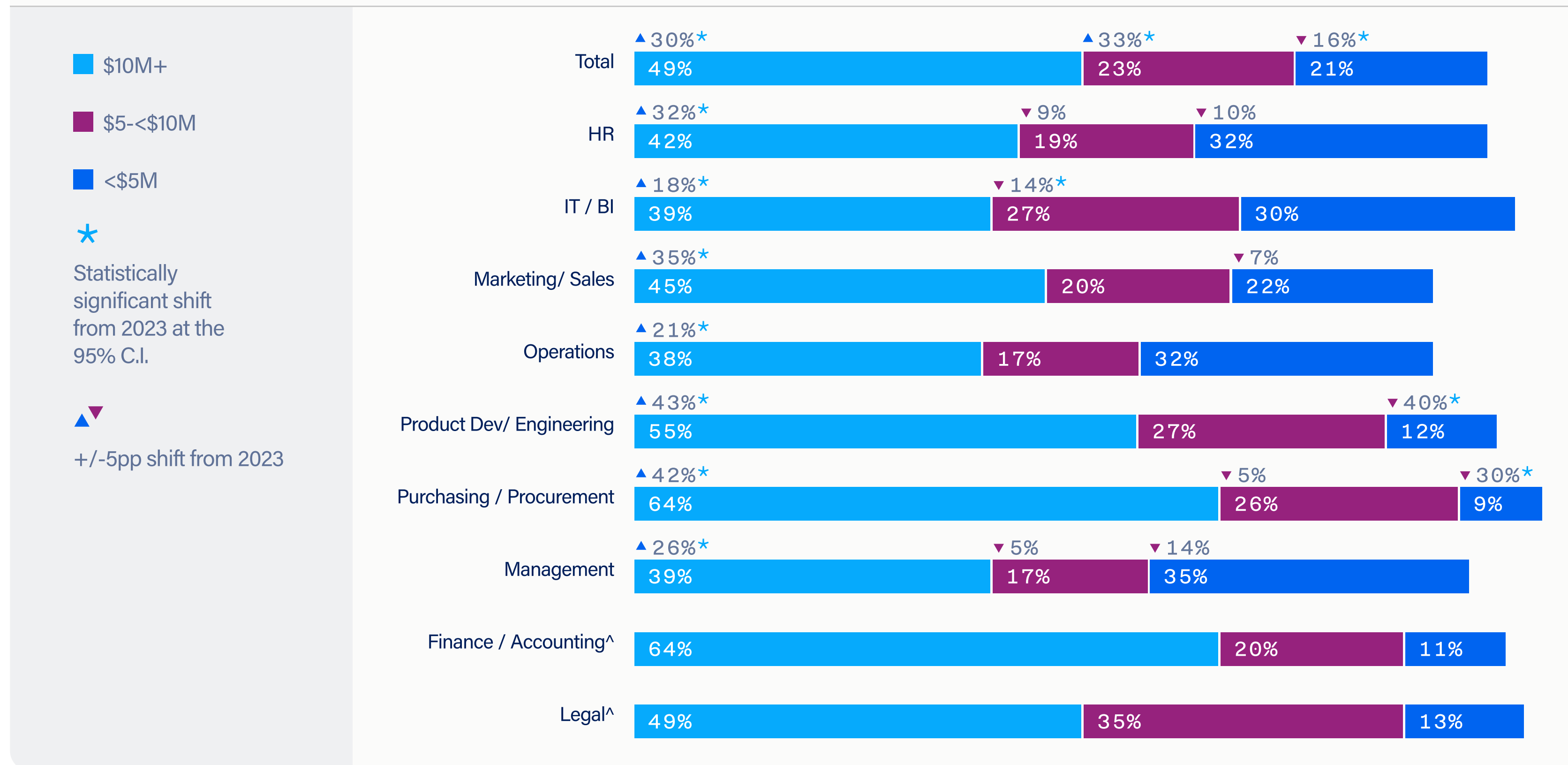
The average investment in Gen AI has **increased 2.3 times**, with enterprises spending \$10.3M compared to \$4.5M last year. Primary investment areas are in technology tools and systems, training, hiring, and consulting.

QSP2. How do you budget for Gen AI across the below areas? - Mean (Excluding Zero) :Summary (Note: New Question in 2024)  
Total: 2024 (n=802)

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# Predicted Future Spending Means More Enterprises with Budgets Greater than \$5M

Gen AI Budget Investment Next Fiscal Year - By Functional Area (Among Total)



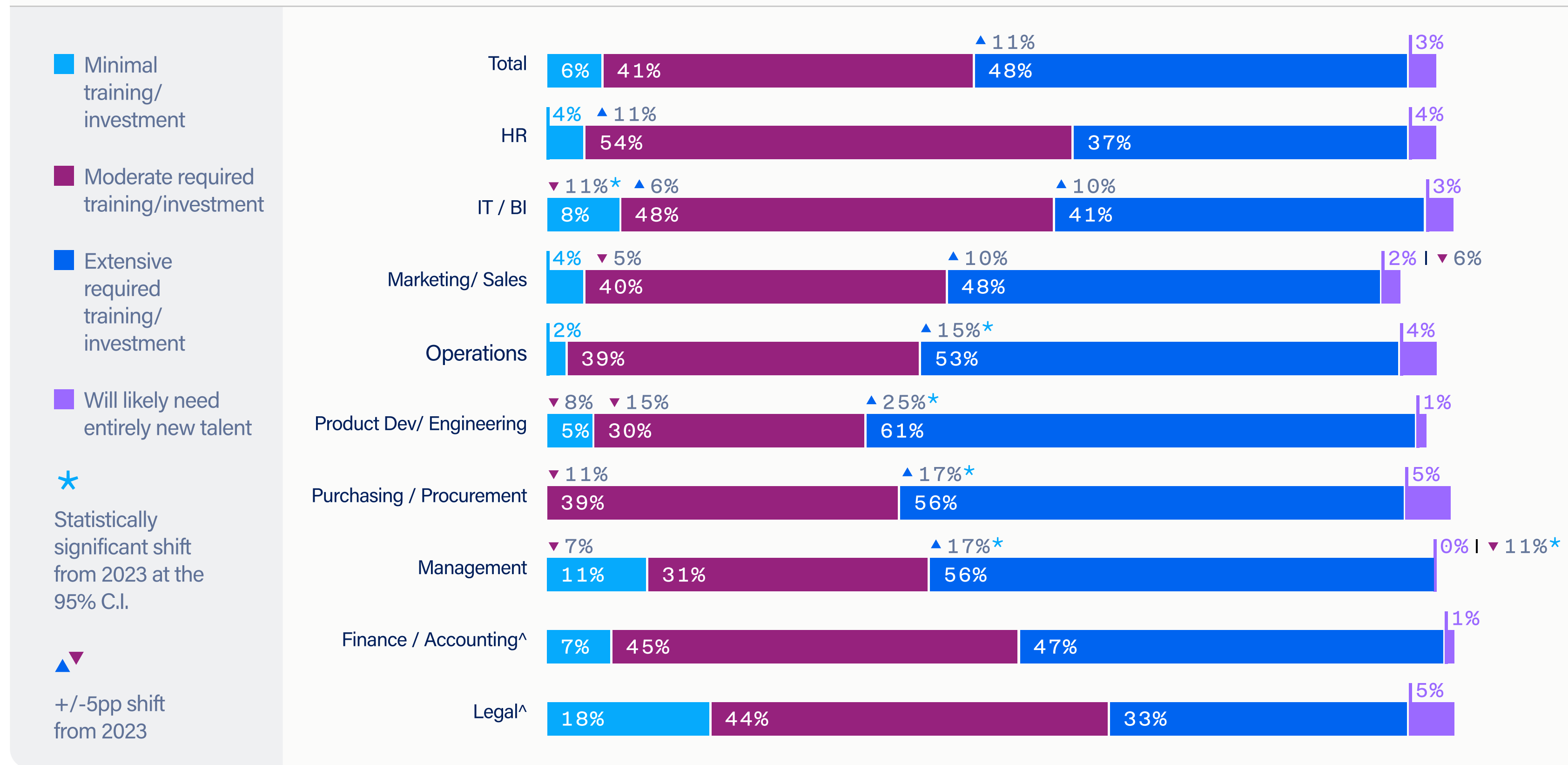
- The last 12 months have seen strong investments in Gen AI, and that should continue with **72% of enterprises predicting Gen AI budget growth** over the next 12 months.
- Finance (**64%**), Purchasing (**64%**), and Product Development/Engineering (**55%**) are most likely to have budgets greater than **\$10M** next year

Does not include "I'm not sure/NA", hence displayed data does not sum to 100% QSP3. Thinking about the next fiscal year, what do you anticipate your organization's approximate total budget will be for Gen AI solutions and related services?  
 Total: 2024 (n=802), HR (n=91), IT/BI (n=92), Marketing/Sales (n=89), Operations (n=92), Product Development /Engineering (n=92), Purchasing (n=102), General Management (n=75), Finance /Accounting (n=91), Legal (n=78)  
 ^Functional areas added in 2024

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# Training Will Be a Major Component of Enterprise AI Strategy

**Training Investment Expectations by Functional Area** (Among Total)



In addition to dollar investments, there is consensus that moderate to extensive training is required in most functions, however not all functions need the same level of training their workforces. While new talent acquisition is most important for legal and general management, most functional areas predict decreases in that need.

Does not include "I'm not sure/NA", hence displayed data does not sum to 100%  
 Q21. What are your expectations regarding the level of effort and / or investment (in terms of training, time, money, resources) that may be required for your employees to effectively use Gen AI tools or systems?  
 Total: 2024 (n=802), HR (n=91), IT/BI (n=92), Marketing/Sales (n=89), Operations (n=92), Product Development /Engineering (n=92), Purchasing (n=102), General Management (n=75), Finance /Accounting (n=91), Legal (n=78)  
 ^Functional areas added in 2024

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# Investment in Training is Limited to the Basics and Not Uniform Across Functional Areas

**Investment in Training - by Functional Area** (Among Total)

	HR	IT/BI	Marketing/Sales*	Operations	Product Dev/Engineering*	Purchasing/Procurement*	Management*	Finance/Accounting*	Legal*
Courses on AI	55%	55%	60%	51%	67%	41%	59%	52%	68%
Providing access to AI tools and software for hands-on learning	66%	57%	55%	49%	47%	49%	59%	32%	68%
Implementing AI learning projects or pilot programs	48%	66%	48%	57%	33%	46%	57%	55%	55%
Developing in-house training modules or courses	52%	43%	50%	57%	40%	36%	43%	48%	51%
Internal workshops or seminars	57%	40%	38%	60%	30%	31%	52%	35%	53%
Hiring external consultants or trainers	41%	38%	40%	40%	43%	41%	39%	35%	49%
Offering certification programs in AI	41%	43%	30%	51%	37%	28%	45%	26%	43%
Partnering with educational institutions for AI training	36%	43%	45%	34%	27%	31%	36%	19%	45%

While budgets will be dedicated to Gen AI training, just over half of companies currently provide courses on AI, hands-on access, and internal projects or pilots. More advanced partnerships, custom in-house training, and internal workshops and seminars lag.

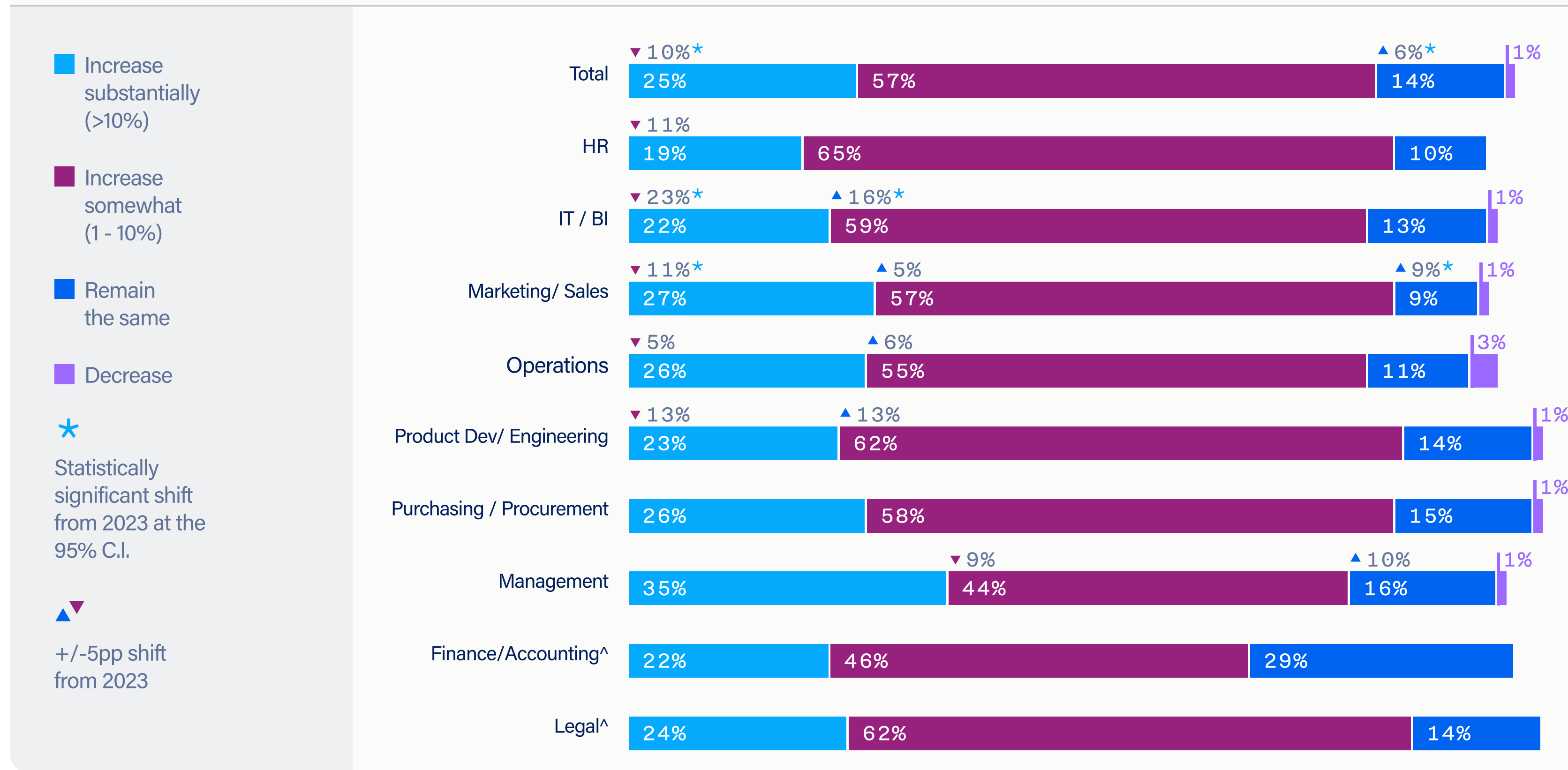
Q23C. Which ways is your organization investing in Gen AI training programs for employees? (Note: New question in 2024), HR (n=56), IT/BI (n=53), Marketing/Sales (n=40), Operations (n=47), Product Development/Engineering (n=30), Purchasing (n=39), General Management (n=47), Finance / Accounting (n=44), Legal (n=31)

\*Base size <50 interpret directionally

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# Investment Will Continue to Increase Over the Next 2 to 5 Years, But at a Slower Pace

Gen AI Budget Investment Next 2 to 5 Years - by Functional Area (Among Total)



Percentage increases in investment—while still large—are slowing compared to last year. Across functional areas, enterprises predict less aggressive budget increases. However, certain functions predict steadier fiscal investments, with IT/BI, Marketing, Operations, and Product/Engineering predicting budgets increasing somewhat (1-10%) or remaining the same.

Does not include "I'm not sure/NA", hence displayed data does not sum to 100%. QSP5. Do you anticipate your organization's spending on Gen AI, 2-5 years from now, to increase, decrease, or remain the same? Total: 2024 (n=802), HR (n=91), IT/BI (n=92), Marketing/Sales (n=89), Operations (n=92), Product Development /Engineering (n=92), Purchasing (n=102), General Management (n=75), Finance /Accounting (n=91), Legal (n=78) ^Functional areas added in 2024

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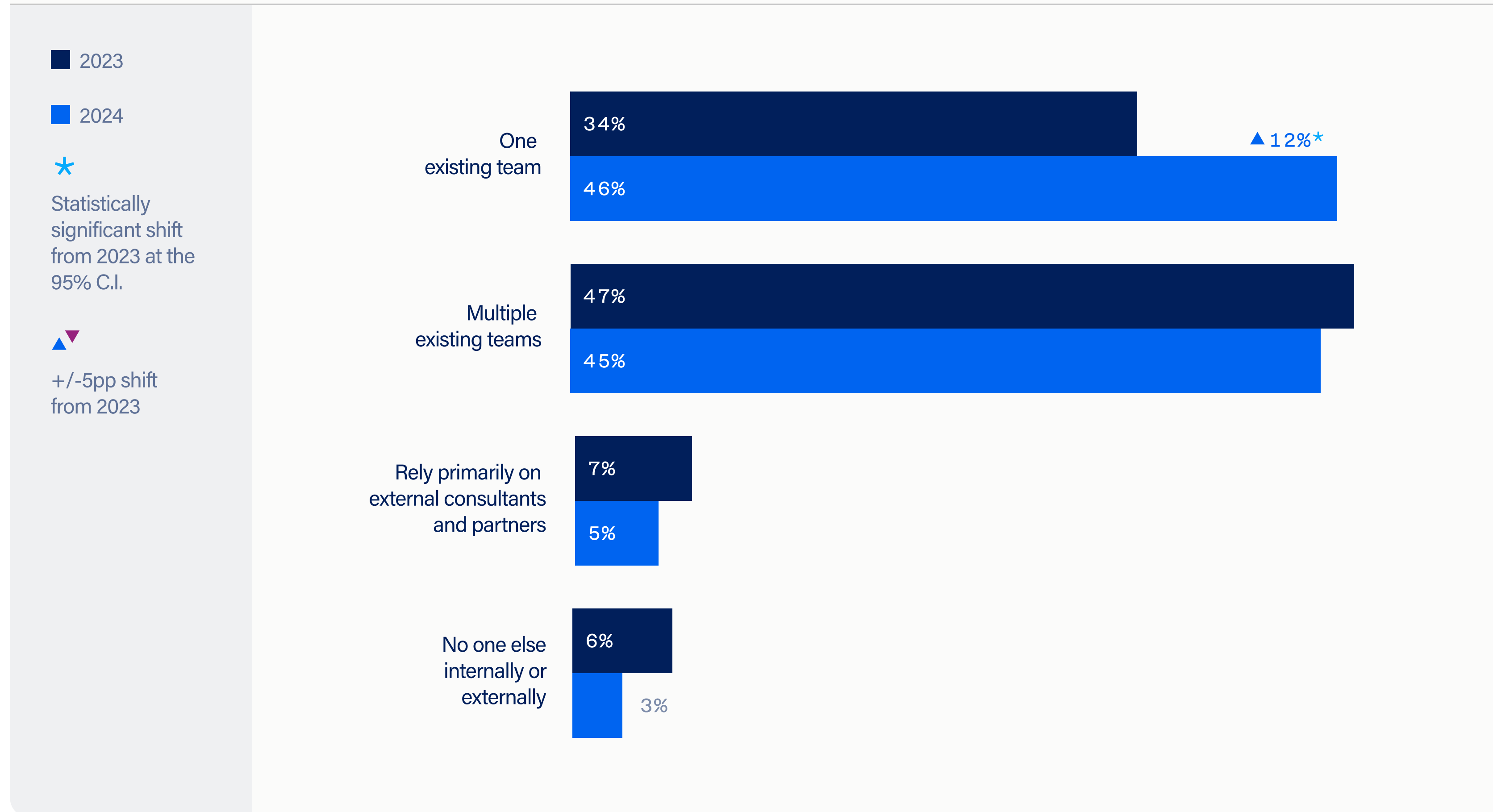
Growing Up: Navigating Gen AI's Early Years." AI at Wharton in collaboration with GBK Collective, October 2024.

# Chief AI Officers (CAIO) are now in 46% of companies:

- **Large companies** (revenue \$2B+): 41%
- **Mid-sized companies** (revenue \$250M to \$2B): 48%
- **Small companies** (revenue \$50M to \$250M): 49%

# Companies are Adapting by Expanding Teams

Responsibility for Gen AI Strategy  
(Among Total)



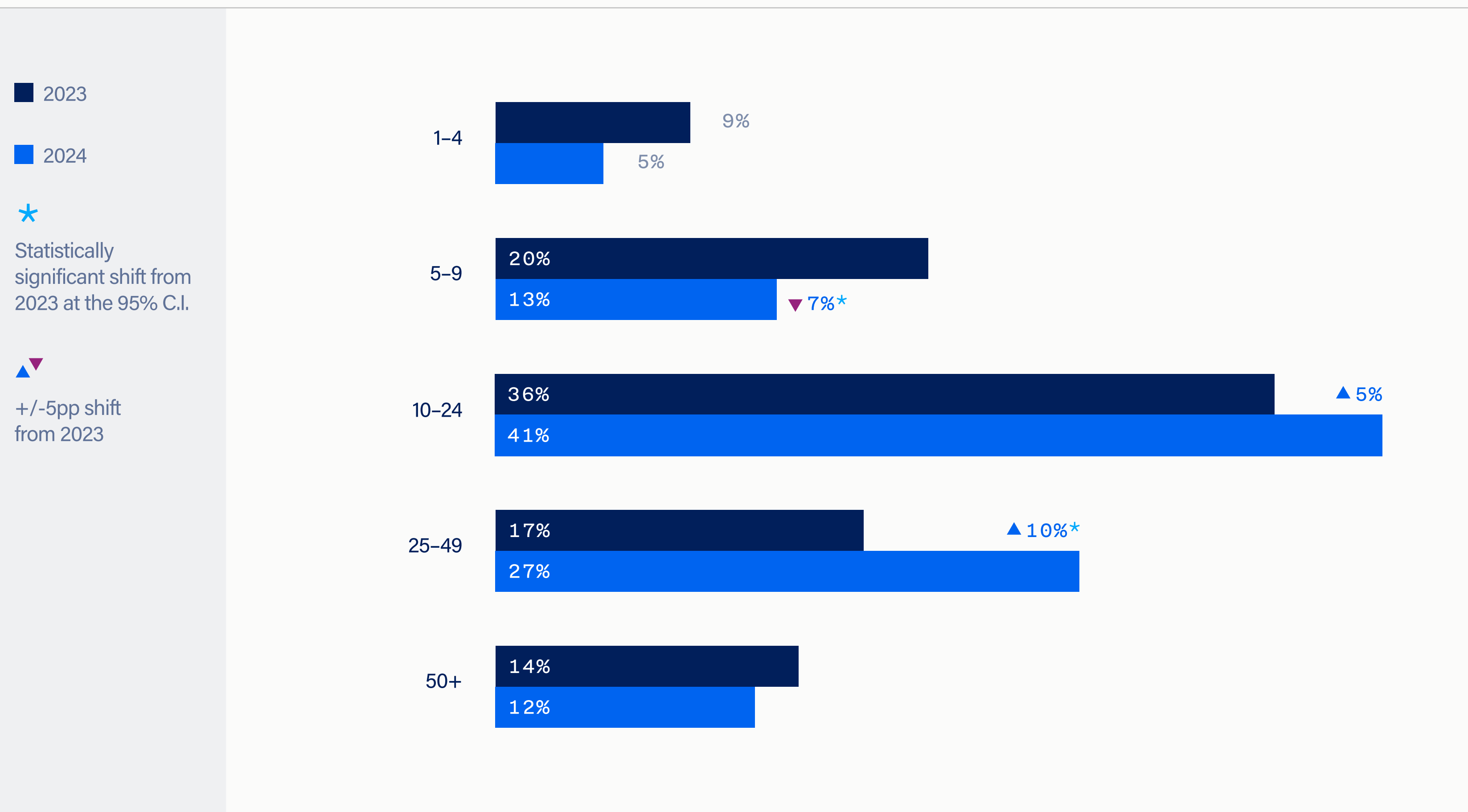
Gen AI strategy responsibilities are being kept in-house across different size teams. However, among those who do not currently have internal teams, **64%** are considering or in the process of creating one.

Q18: Who in your organization is currently responsible for your Gen AI strategy? 2024 (n=802), 2023 (n=672)

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# Size of AI Teams Has Increased

**Team Composition with Number of People**  
(Among those with Existing Teams)



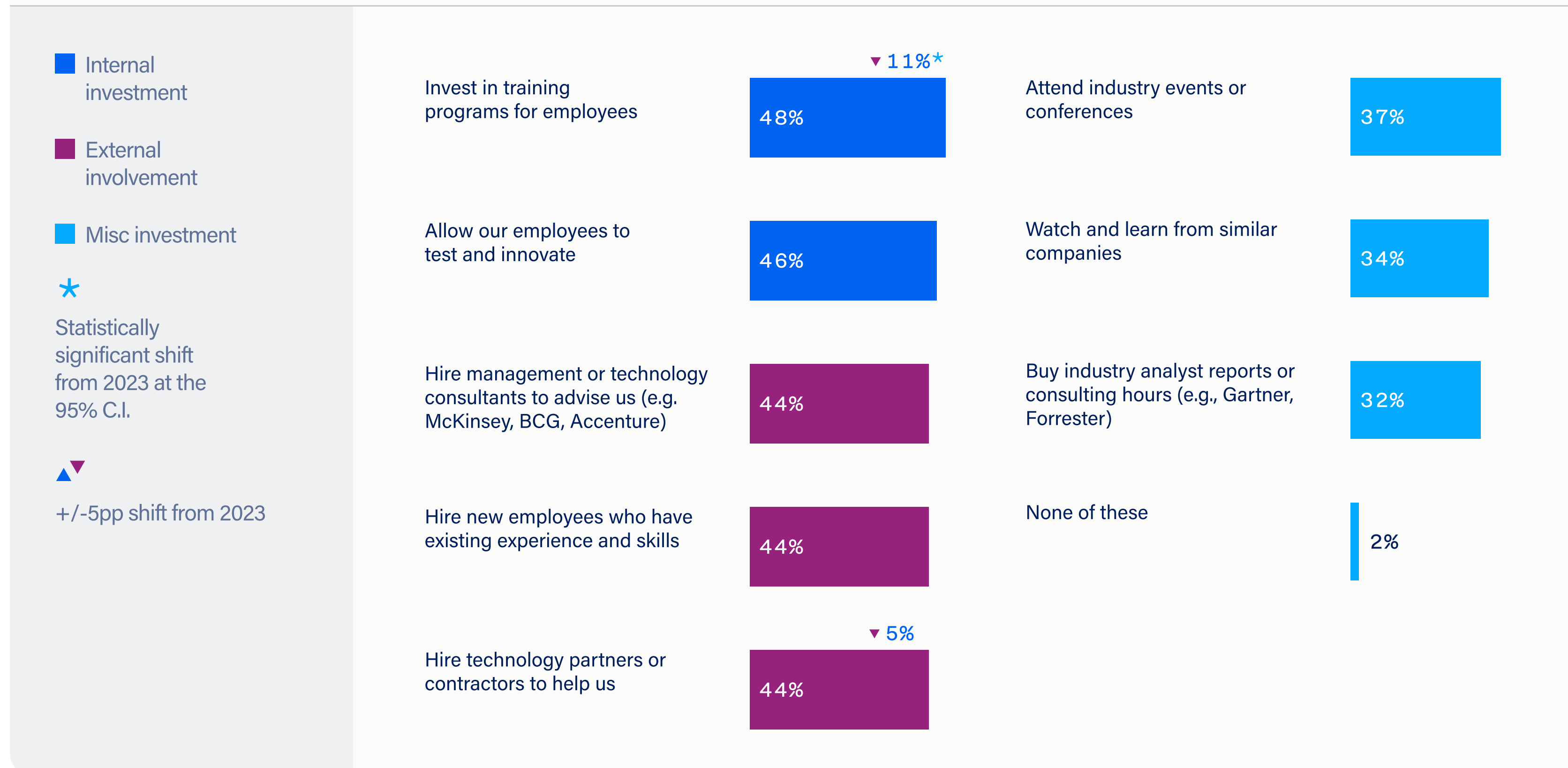
Size of AI teams have grown. Among smaller organizations, Chief AI Officer (CAIO) roles are prevalent.

Q19. Approximately how many people are specifically focused on your Gen AI strategy? 2024 (n=731), 2023 (n=541)

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# Role of Training is Up for Debate; Rollout of GenAI is Not Guided by One Strategy

## Strategies for Rolling Out Gen AI (Among Total)



- Although the most common investments are employee programs for training, testing, and innovating with Gen AI, enterprises may be in a "wait-and-see" period, relying on lower-cost options such as industry reports.
- Fewer than half expect to bring in external consultants, partners, or contractors. Those who will bring in consultants expect that they will play a substantial role in strategy, planning, and rollout.

Q22. Which of the following methods has your organization done, or is currently doing, in making decisions on how to use or roll out our Gen AI solutions or tools? 2024 (n=802)

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**Among those planning to hire external consultants, 63% say that these consultants will have a substantial role, while 29% indicate they'll play a moderate role. Only 8% will rely primarily on consultants.**

Q23A. How big of a role do you expect management and technology consultants to play in your organization's strategy, planning, and rollout of Gen AI projects?  
2024 (n=354)

# DETAILED FINDINGS: **DRIVERS & USE CASES**



## Key Findings on Drivers & Use Cases

**AI is everywhere.** Last year, decision-makers expected Gen AI to touch everything—data analysis, content creation, research, and more. Indeed, after a year of usage and increased familiarity, use cases exist across a wide range of areas, including document writing/editing, analysis, data analysis, and summarization.

**Top drivers.** Top drivers of Gen AI adoption include decision-makers' expectations that it will boost productivity, optimize operations, and enhance customer experiences. However, the perceived benefits and factors for consideration have decreased from last year—perhaps indicative of decision-makers' better understanding of the realities of Gen AI's abilities.

**Barriers remain, but to a lesser degree.** Accuracy concerns, privacy risks, and integration challenges are the biggest hurdles to adoption. However, concerns have decreased around cost, trust (employee/internal resistance and lack of trust), and ethical concerns around the technology (e.g., systemic biases, transparency).

# The Top Use Cases are Not Always Top Performers— Idea Generation, Legal Contracts, and Fraud Detection Perform Well

## Gen AI Use Case Performance

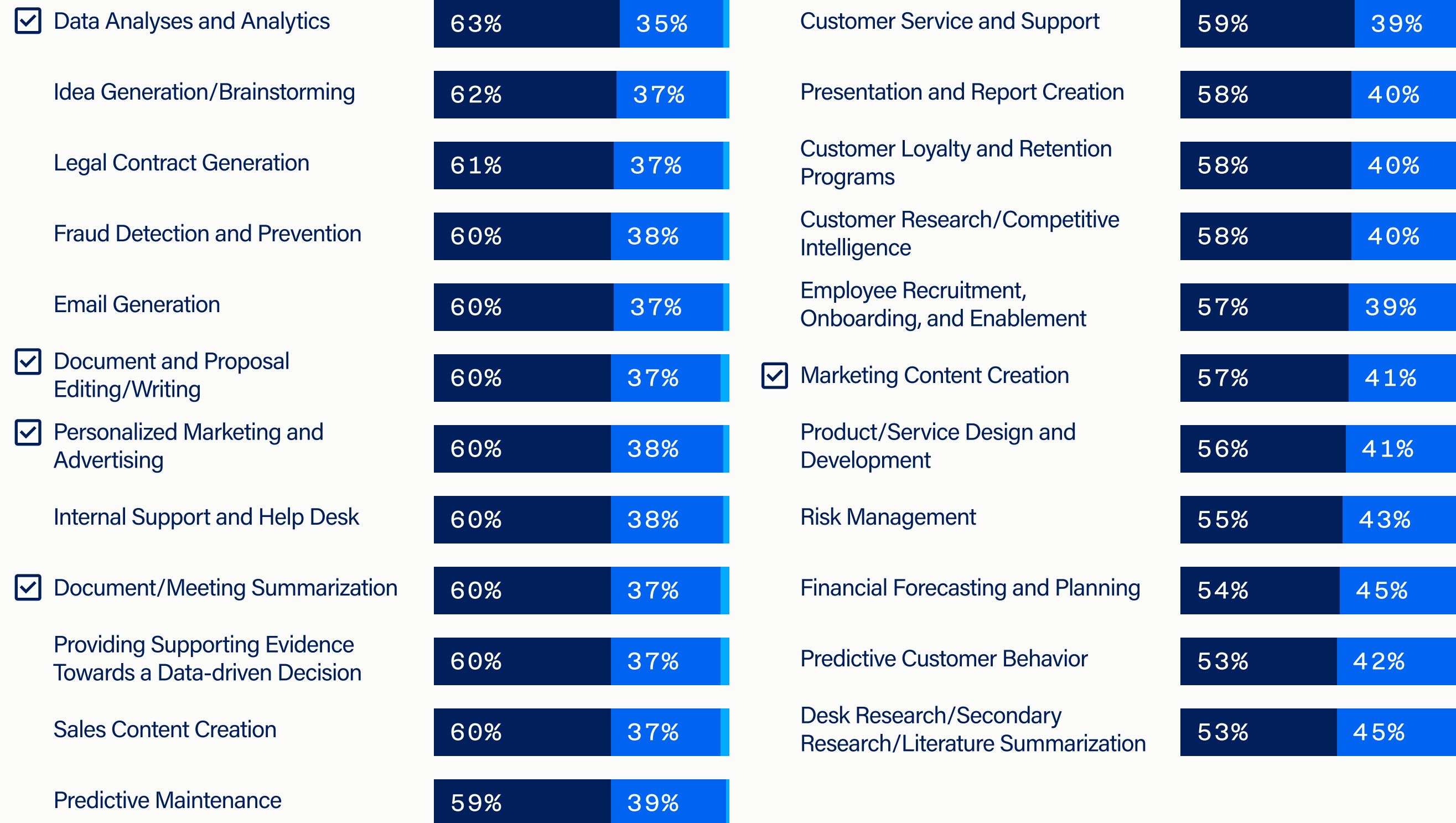
(Among Organizations Currently Using Gen AI)

Great Performance

Good Performance

Poor Performance

Top 5 most common use cases for Gen AI



Users of Gen AI rated its performance, putting data analytics as a top performer along with other idea and content generation.

Q8A. How well do you feel Gen AI has performed in each of these areas? (note: New question in 2024) Organization currently uses Gen AI (n=Base Varies)

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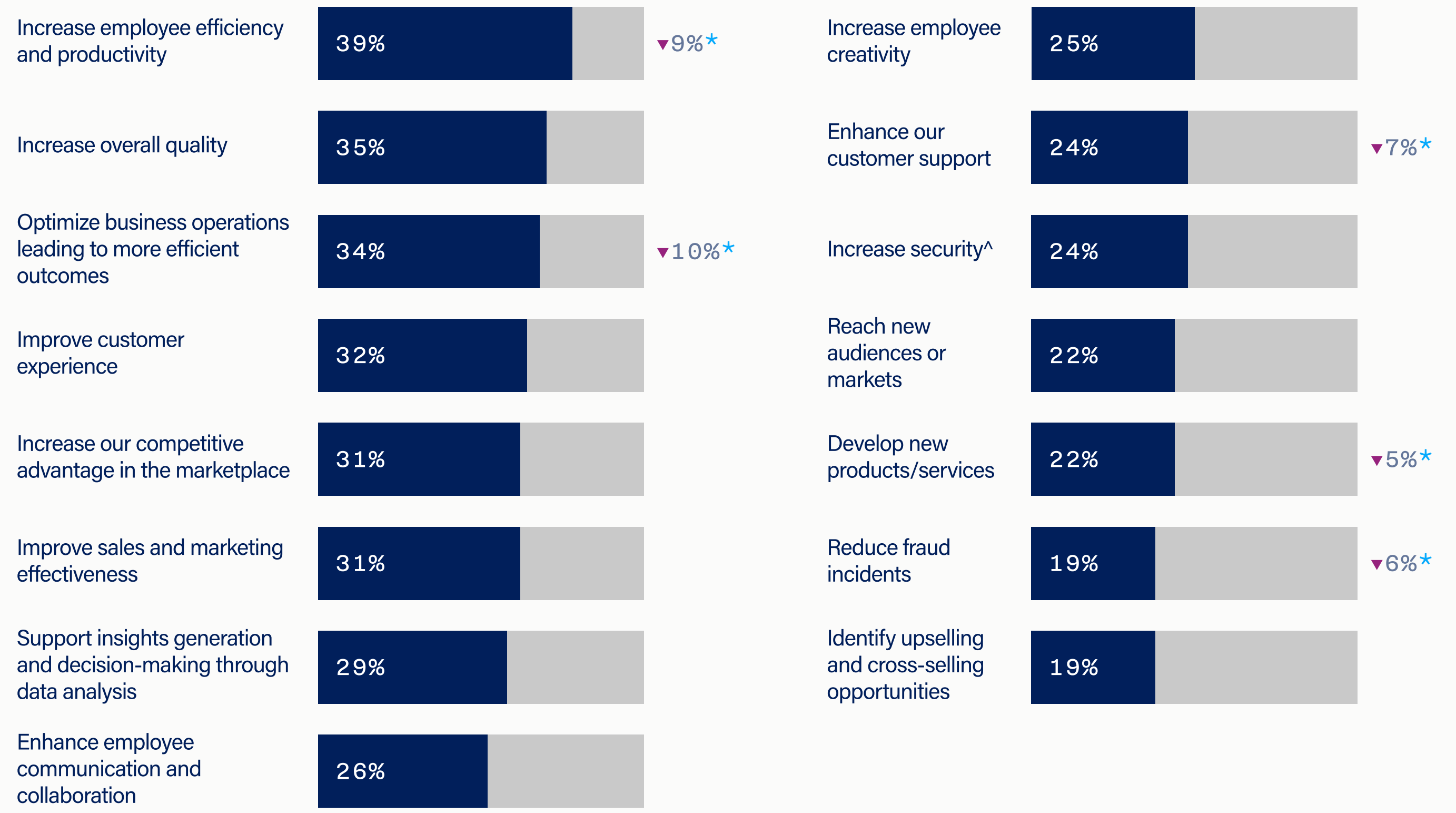
# Reasons for Using Gen AI Are Relatively Consistent This Year, With Some Softening in Intensity on Productivity and Optimization

## Benefits of Using GenAI

(Among Those Likely to Use or Using Gen AI)

\* Statistically significant shift from 2023 at the 95% C.I.

▲▼ +/-5pp shift from 2023



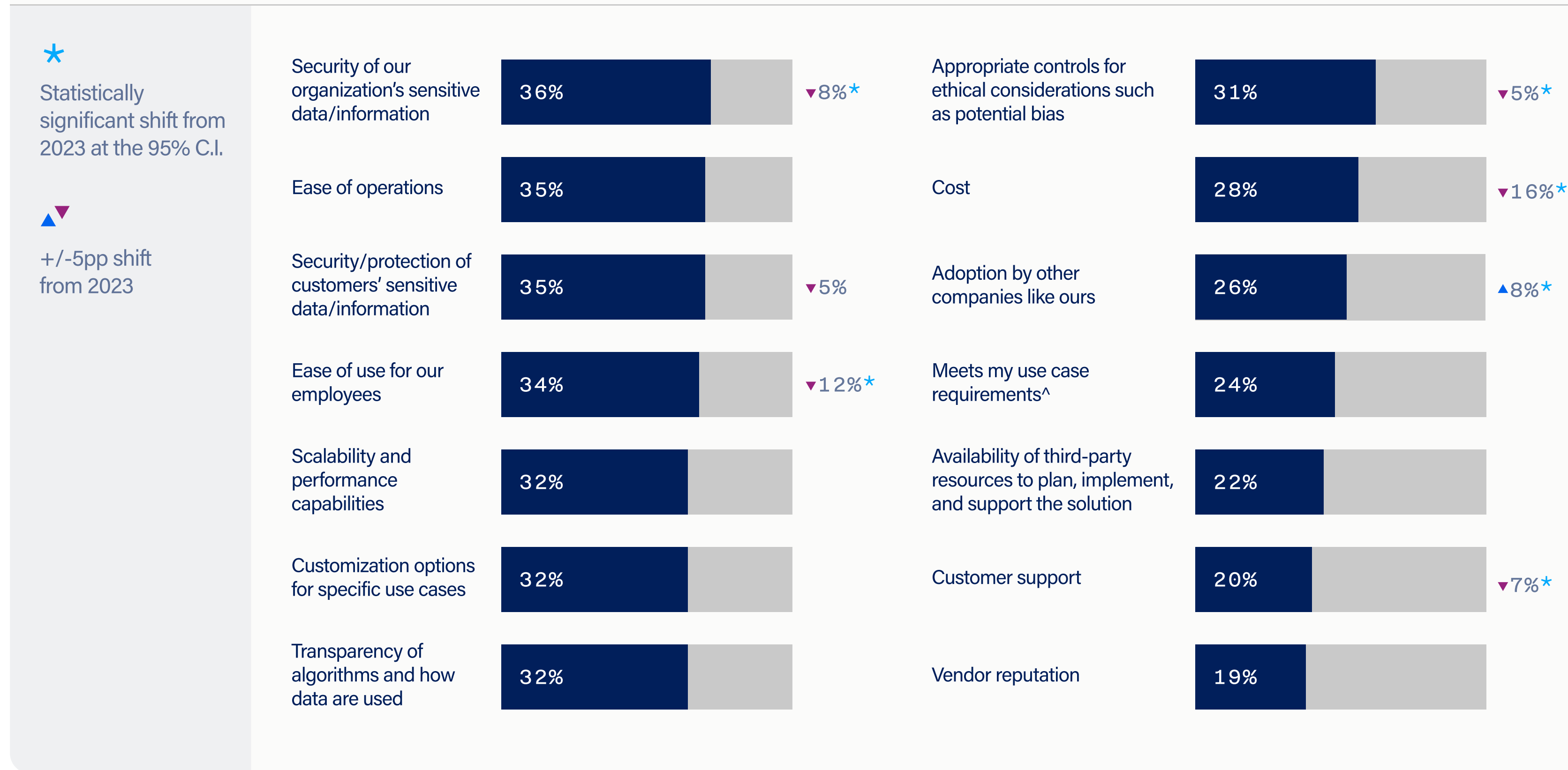
Across enterprises of all revenues, **employee efficiency/productivity, increases overall quality, and optimize business operations leading to more efficient outcomes** are the highest perceived benefits of using Gen AI.

Q10. What are the main benefits your organization is seeking by using Gen AI? Currently use or intend to use Gen AI (n=794)  
 "Other" (<1%) and "None" (<1%) datapoints not shown.  
 ^Added in 2024

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# Security and Ease of Use Are Most Considered When Selecting a Gen AI Solution / Platform

What is Considered When Selecting a Gen AI Solution / Platform (Among Total)



- Consistent with last year, **Security** and **Ease of operations** are the top factors for consideration of Gen AI. Larger organizations also focus on Cost and Transparency of the algorithm and how data is used.
- **Cost as a barrier** factor fell from a top 3 consideration in 2023, suggesting firms are understanding Gen AI's value, and **Ethical Considerations** also fell, perhaps as familiarity has increased.
- **Adoption by similar companies** and **Availability of 3P resources** are up from last year are factors to watch.

Q12. What are the top factors you would consider when selecting a Gen AI solution or platform for your organization?  
 2024 (n=802)  
 ^Added in 2024

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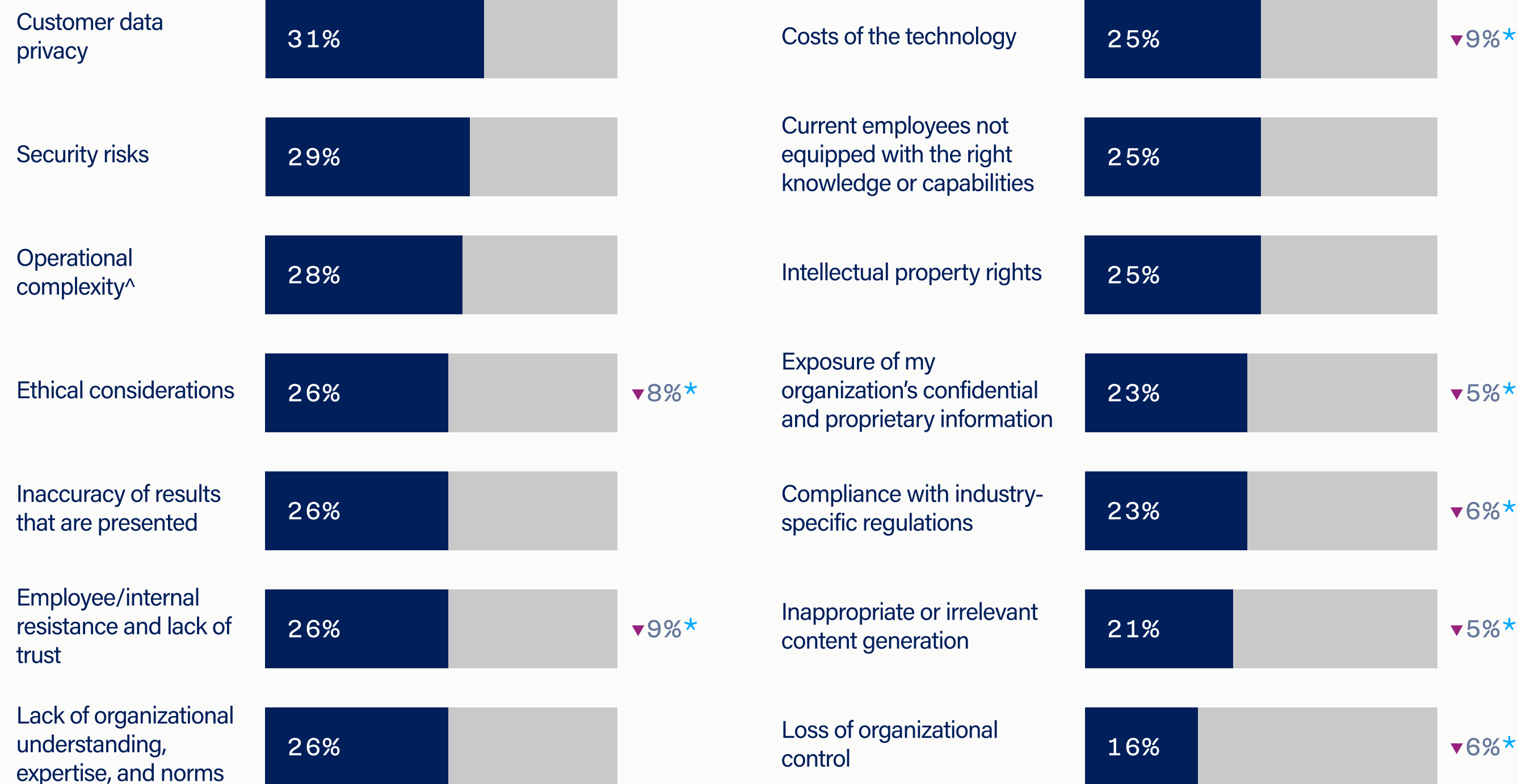
# Concerns About Gen AI Have Decreased Over the Past Year

## Barriers to Using Gen AI

(Among Those Likely to Use or Using Gen AI)

★ Statistically significant shift from 2023 at the 95% C.I.

▲▼ +/-5pp shift from 2023



- **Cost and Ease of use**—top barriers in 2023—have decreased in concern, suggesting enterprise decision-makers have more comfort with Gen AI.
- Last year, **inaccuracy of results, customer data privacy, and employee resistance & lack of trust** were top challenges, however after a year of increased familiarity only **customer data privacy** remains a top concern.

Q11. What are your main challenges or concerns related to using Gen AI within your organization? 2024 (n=802)  
 "Other" (<1%) and "None" (<1%) datapoints not shown.  
 ^Added in 2024

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# DETAILED FINDINGS: **ATTITUDES & PERCEPTIONS**

## Key Findings on Attitudes & Perceptions

**Vibes are positive.** After 12 months, positive emotive associations like Optimistic, Excited, and Appreciation for Gen AI are up, while Caution and Skepticism are down, as senior decision-makers have more understanding of the technology. While the negative potential of Gen AI is still in the back of users' minds, in the short-term there has been a positive shift.

**Curiosity is being replaced by excitement.** As familiarity and usage of Gen AI has grown over the last 12 months, enterprise users have had a chance to test and try out Gen AI, thus satisfying their curiosity.

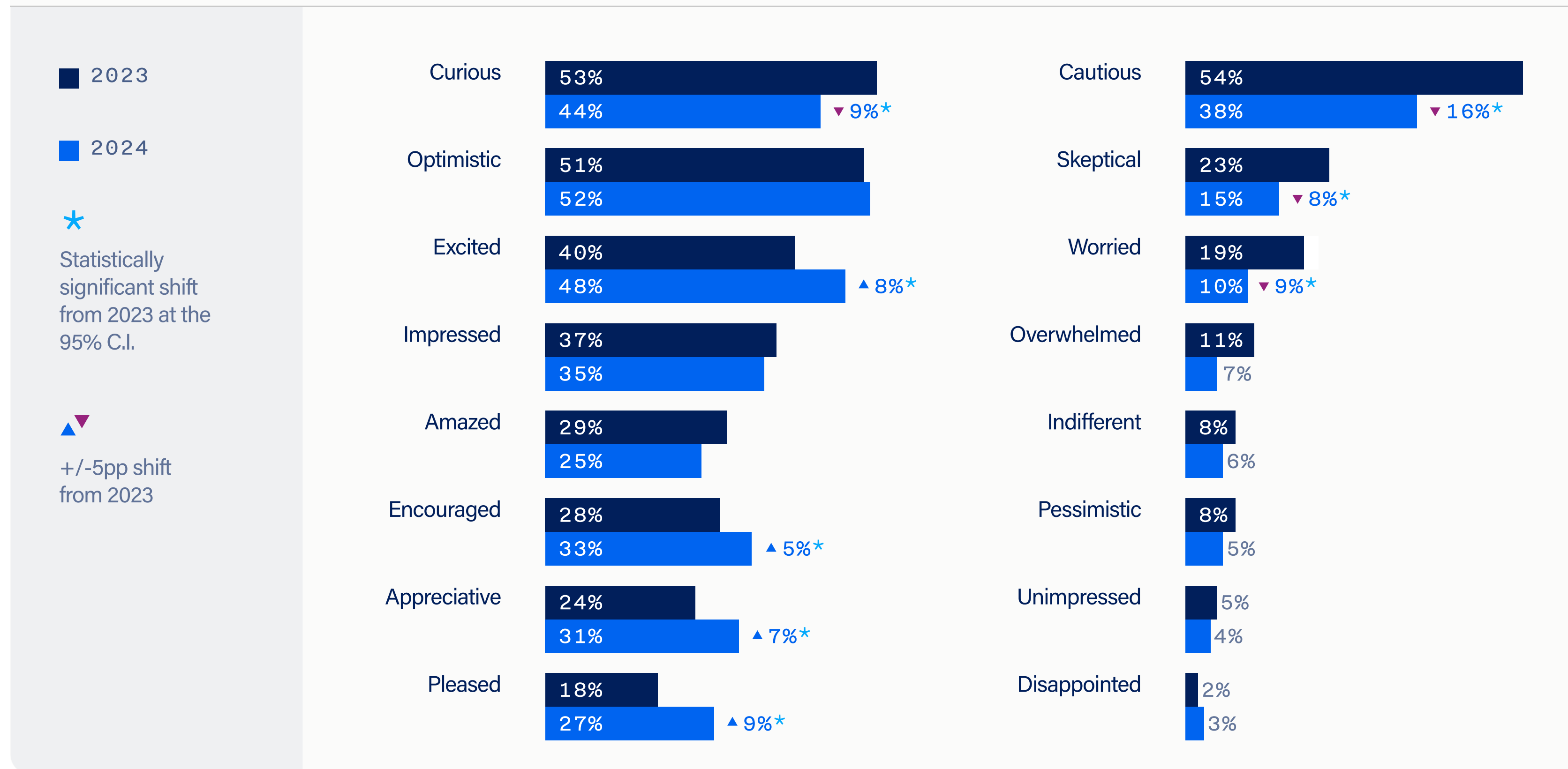
**Gen AI is being seen as a productivity booster.** As decisions-makers become more familiar with Gen AI, there is softened concern of it being a direct competitor to human capital and a realization that Gen AI is a tool that compliments and creates efficiencies in work streams.

**Microsoft and Google are still the leaders in the Gen AI race.** Microsoft has taken the top leadership role as Google slips over the last 12 months despite initial predictions it would continue to widen the gap. OpenAI and AWS are rising stars.

**LLMs are going mainstream.** Foundational models like GPT-4 are becoming enterprise staples. Users are becoming comfortable with more than just one model, exploring Claude (Anthropic), Copilot (Microsoft), MetaAI (Meta), and Perplexity, using both free and subscription versions (individual and commercial).

# Leaders Show the Same or More Optimism and Excitement, with Decreased but Still Notable Curiosity and Caution

**Emotional Associations with Gen AI**  
(Among Total)



Enterprise users are still “optimistic” and even more “excited” about Gen AI, however, they are less “curious” after having another year to build their familiarity with Gen AI.

Q3A. Which (if any) of the words below describes your perception of Gen AI as it stands today?  
 Q3B. Which (if any) of the below words describes your perception of Gen AI as it stands today?  
 Total: 2024 (n=802), 2023 (n=672)

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# Gen AI is Still Seen More as a Tool to Enhance Employee Efficiency, Rather than a Replacement

**Perceptions of Employee Impact**  
(Among Total, Top 2 Box – Strongly/Strongly Agree)

■ 2023  
■ 2024  
★ Statistically significant shift from 2023 at the 95% C.I.  
▲ +/-5pp shift from 2023

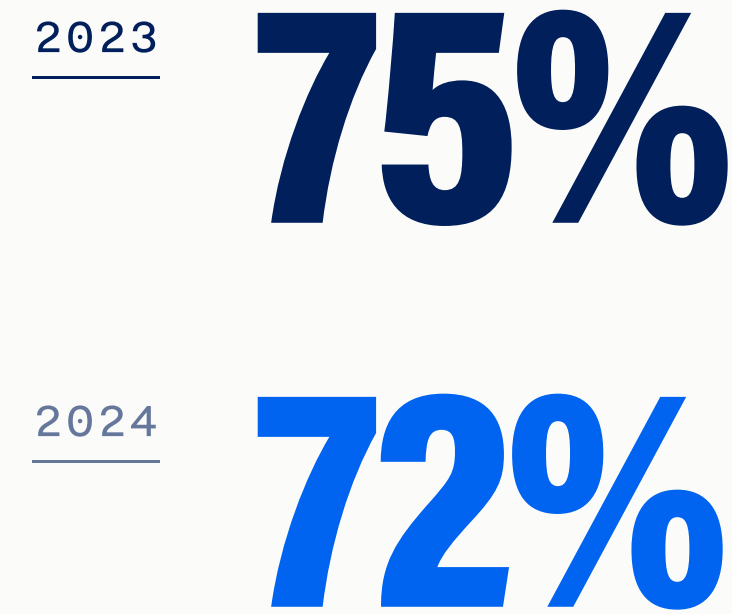
**Enhance** employees' skills in some tasks



"AI will not replace people for certain jobs, but rather enhance employee output and help improve the overall quality of the output of employees and eliminate human error, and improve quality."

Leader in Automotive, \$2B+ Annual Revenue

**Replace** employees' skills in some tasks



"The company is asking its best coders to train the AI and it's hard to fathom that this is entirely altruistic. I believe that companies will use AI to replace human workers because it's cheaper."

Leader in Technology/Telecom, \$250M - \$1B Annual Revenue

As familiarity and usage increase, there is more agreement on statements of efficiency and supplemental enhancement versus replacement.

Those working in Purchasing/Procurement (97%) are more likely than most other functions to agree Gen AI will 'enhance' skills, while those in Finance (87%) are more likely to agree it will 'replace'.

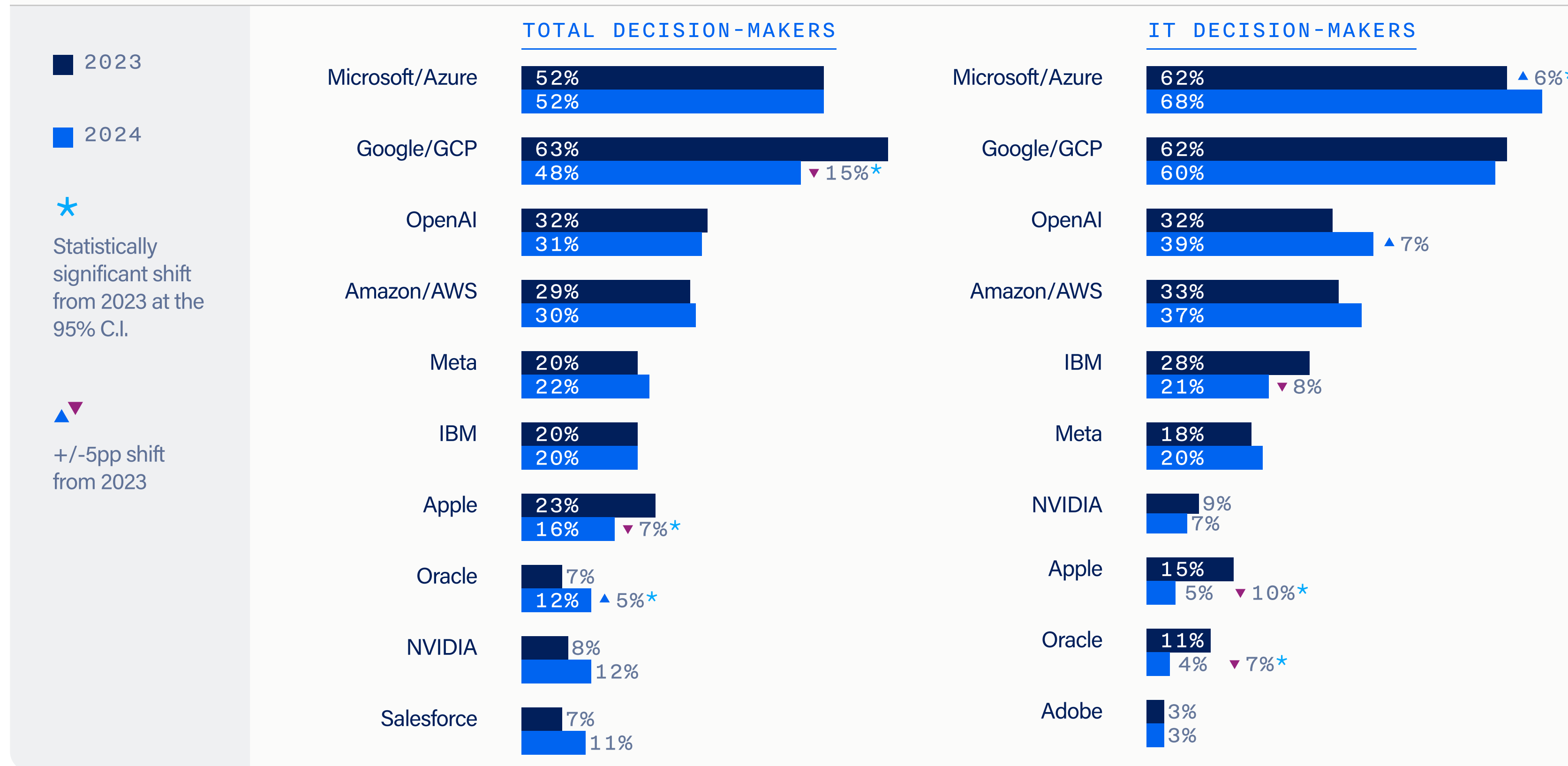
Q6. What is your level of agreement with the following statements regarding the current impact of Gen AI on your organization? - Strongly/somewhat agree :Summary  
Total: 2024 (n=802), 2023 (n=672)

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# Microsoft and Google are Seen as Today's Standout Leaders in Gen AI

## Perception of Leaders in Gen AI – TODAY

(Among Total and IT Decision-Makers, % of the time each brand was selected in the top 3)



- Among all decision makers, Microsoft/Azure and Google are seen as equal, although Google has slipped (-16pp) from its big lead last year.
- Among IT Decision Makers, Microsoft (+6pp) has broken away from Google (-2pp).
- Open AI and Amazon/AWS come in closely together in the 3rd and 4th positions.

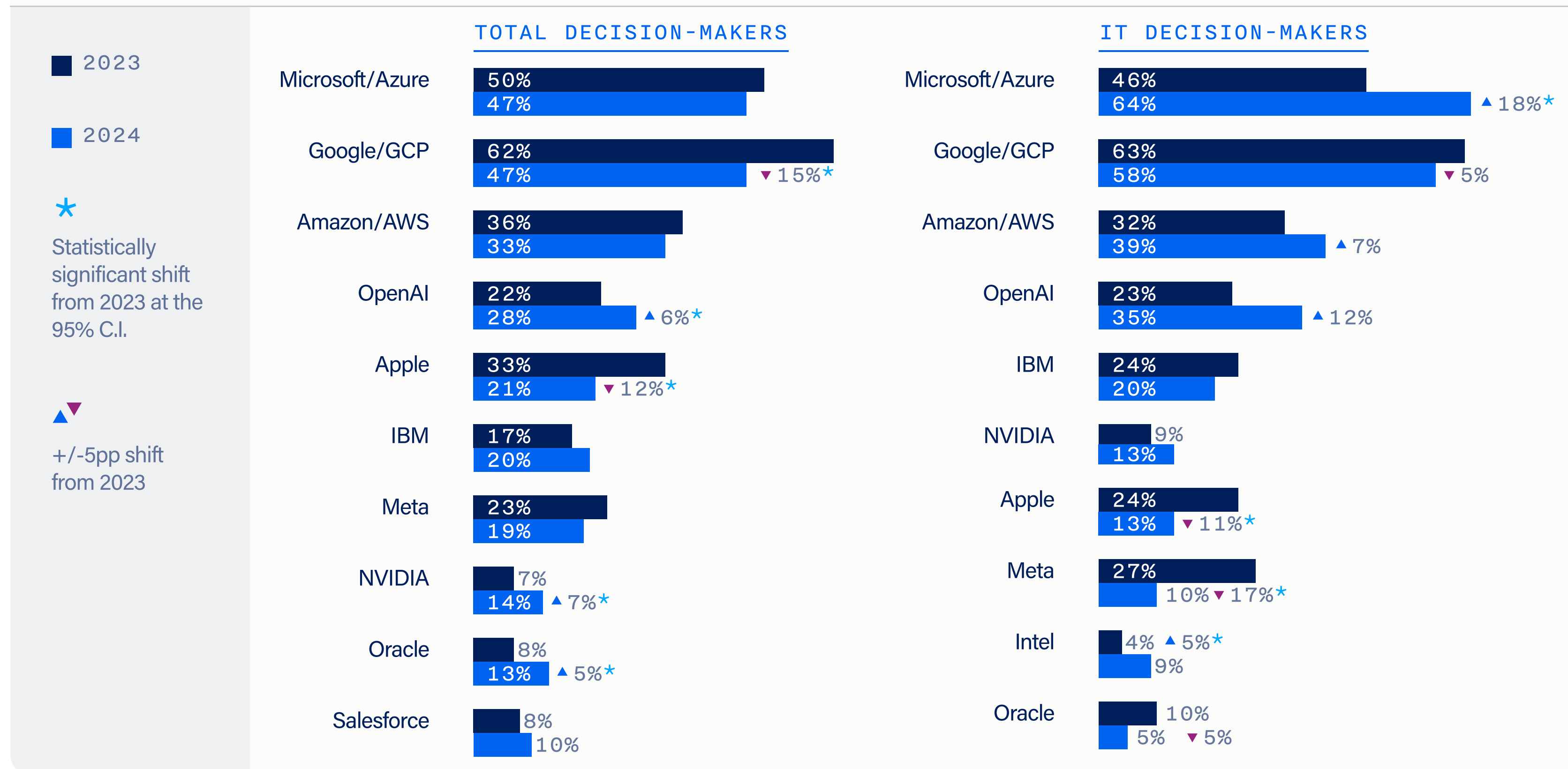
Q13A. Which of the following companies do you consider to be the current leaders in Gen AI?  
 Total: 2024 (n=802), 2023 (n=652); IT Decision-Makers: 2024 (n=92), 2023 (n=117)

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# Microsoft and Google Are Expected to Maintain Their Front-runner Status, Although IT Leaders Feel More Bullish about Microsoft

## Perception of Leaders in Gen AI – FUTURE

(Among Total and IT Decision-Makers, % of the time each brand was selected in the top 3)



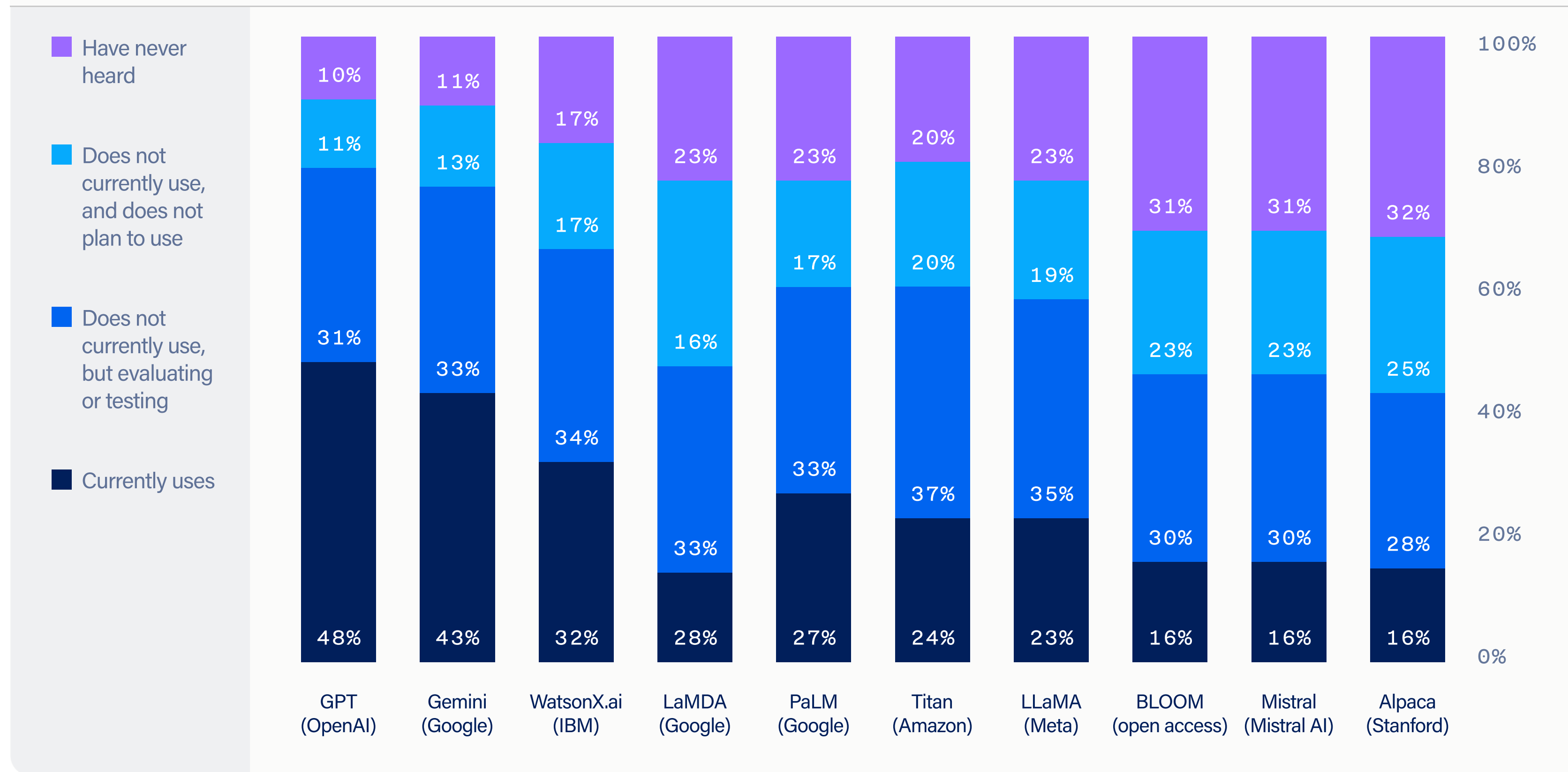
- Perceptions that Google will lead in Gen AI in the future are sharply down this year compared to last year speaking to the rocky year Google has had in its Gen AI roll-out of Bard and Gemini.
- Among IT decision-makers, Microsoft has dramatically increased (+18 percentage points) in perceptions as a future leader.

Q13B. Which of the following companies do you expect to be the leaders in Gen AI in the next 3-5 years?  
 Total: 2024 (n=802), 2023 (n=672); IT Decision Makers: 2024 (n=92), 2023 (117)

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# GPT and Gemini are the Most Commonly Used Large Language Models

Large Language / Foundational Models  
(Among Total)



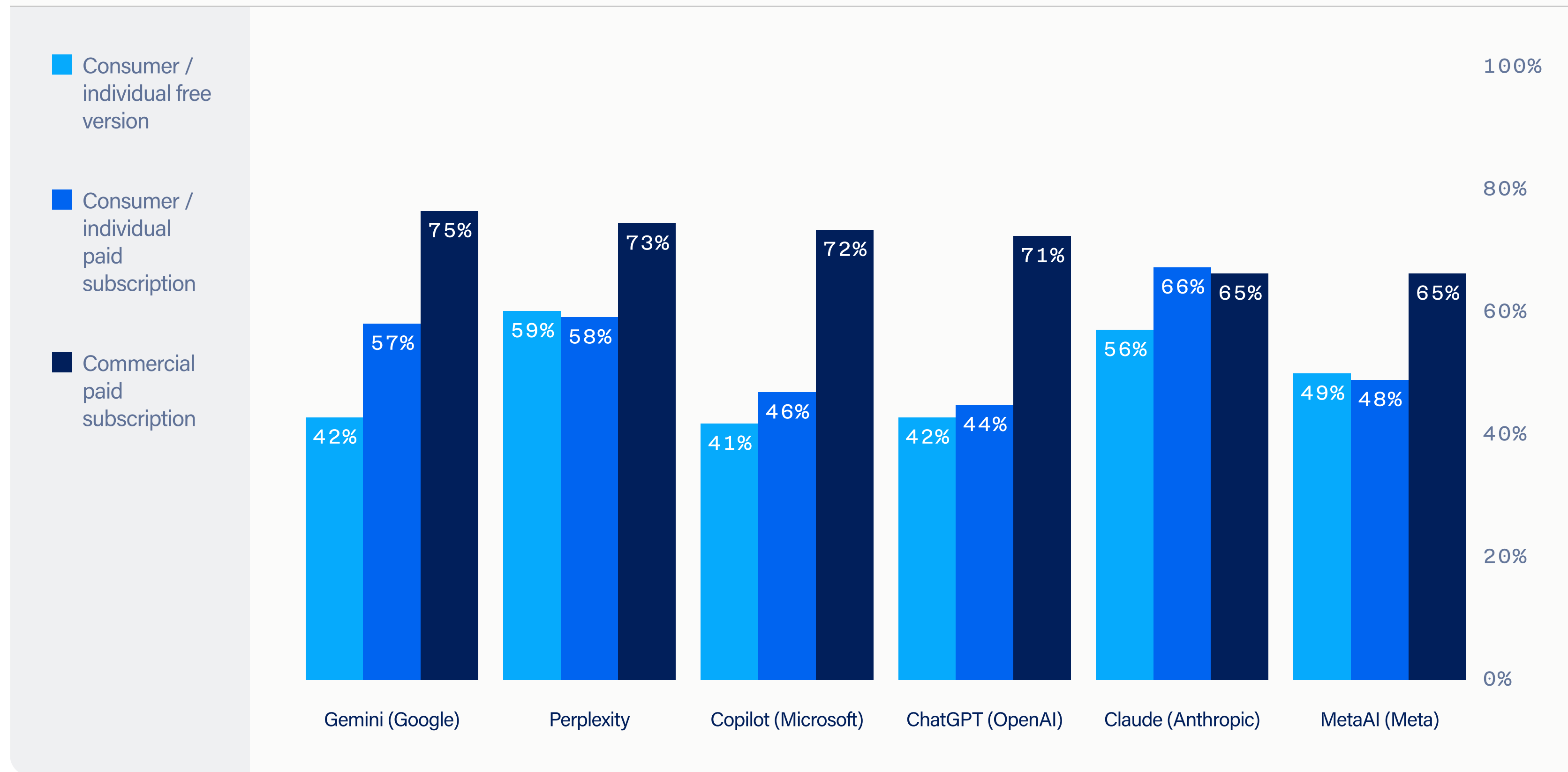
In Large Language Models (LLMs), **79%** of decision-makers are either currently using OpenAI’s GPT in some capacity, or planning to use it in the future as the dominant market leader right now. Overall, familiarity with LLMs has grown, as companies test, use and evaluate.

Q16A. Please indicate your organization's use of the specific foundational LLMs (Large Language Model) listed below. - Currently use :Summary 2024: (n=802) (Note: Question wording updated in 2024)

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# Four Players Vie for Commercial Subscriptions, While Consumer Versions Face More Competition

**ChatBot Subscription Type**  
(Among current users of each ChatBot)



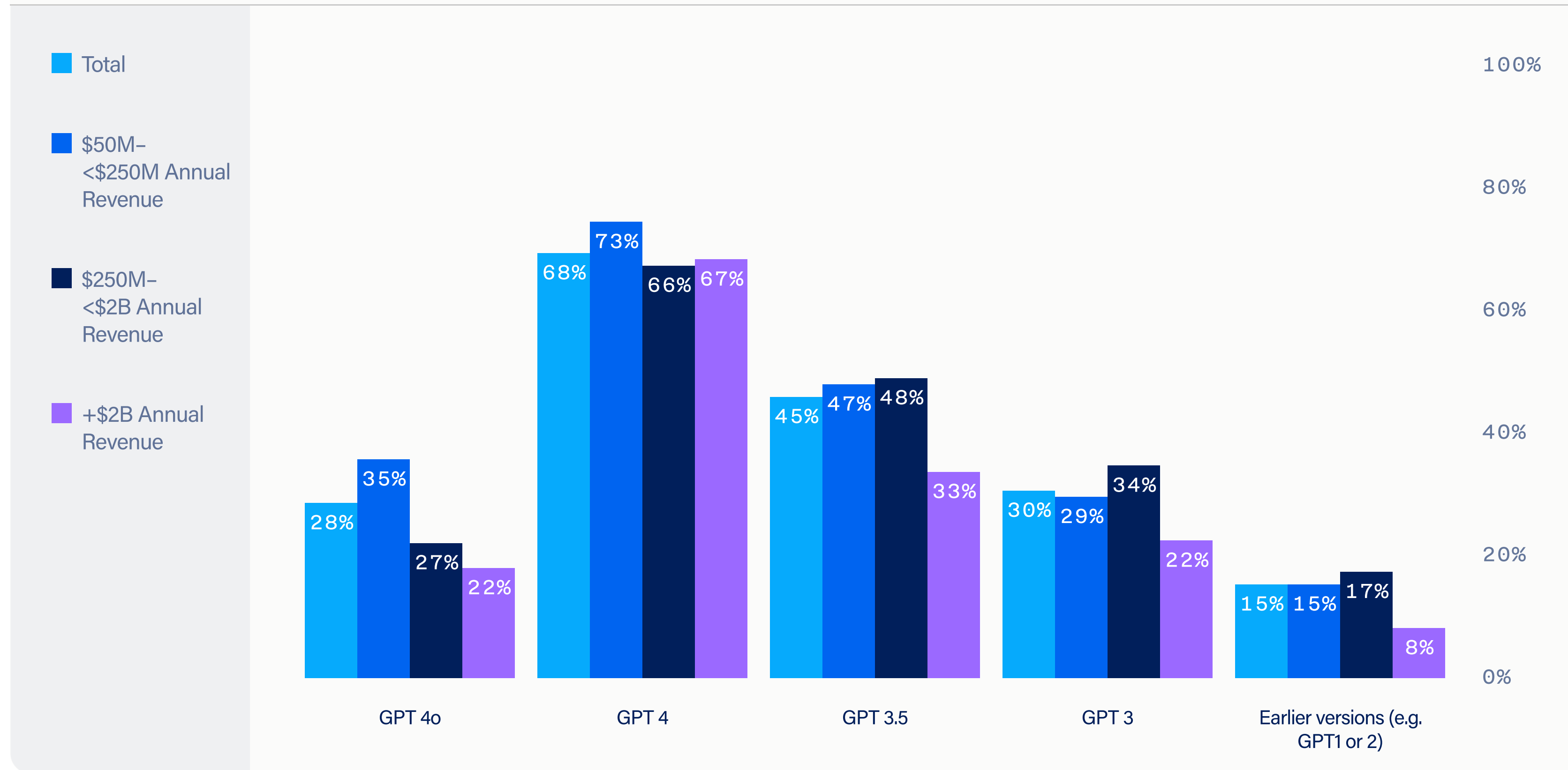
In chatbots, Google, Perplexity, Copilot, and OpenAI are holding leads with commercial paid subscription users. Among consumer/individual versions, Claude is the top paid subscription and Perplexity is the top free version.

Q15. You said you are using <Gen AI Chatbot> in your organization. Which specific subscription model are you using? (Note: Question wording updated in 2024)  
ChatGPT Current Users (n=498), Copilot Current Users (n=414), Claude Current Users (n=152), MetaAI Current Users (n=318), Gemini CurrentUsers (n=321)

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# OpenAI's ChatGPT4 is the Dominant Model Across Different Size Organizations

**Commercial ChatGPT Subscriptions**  
(Among current ChatGPT users)



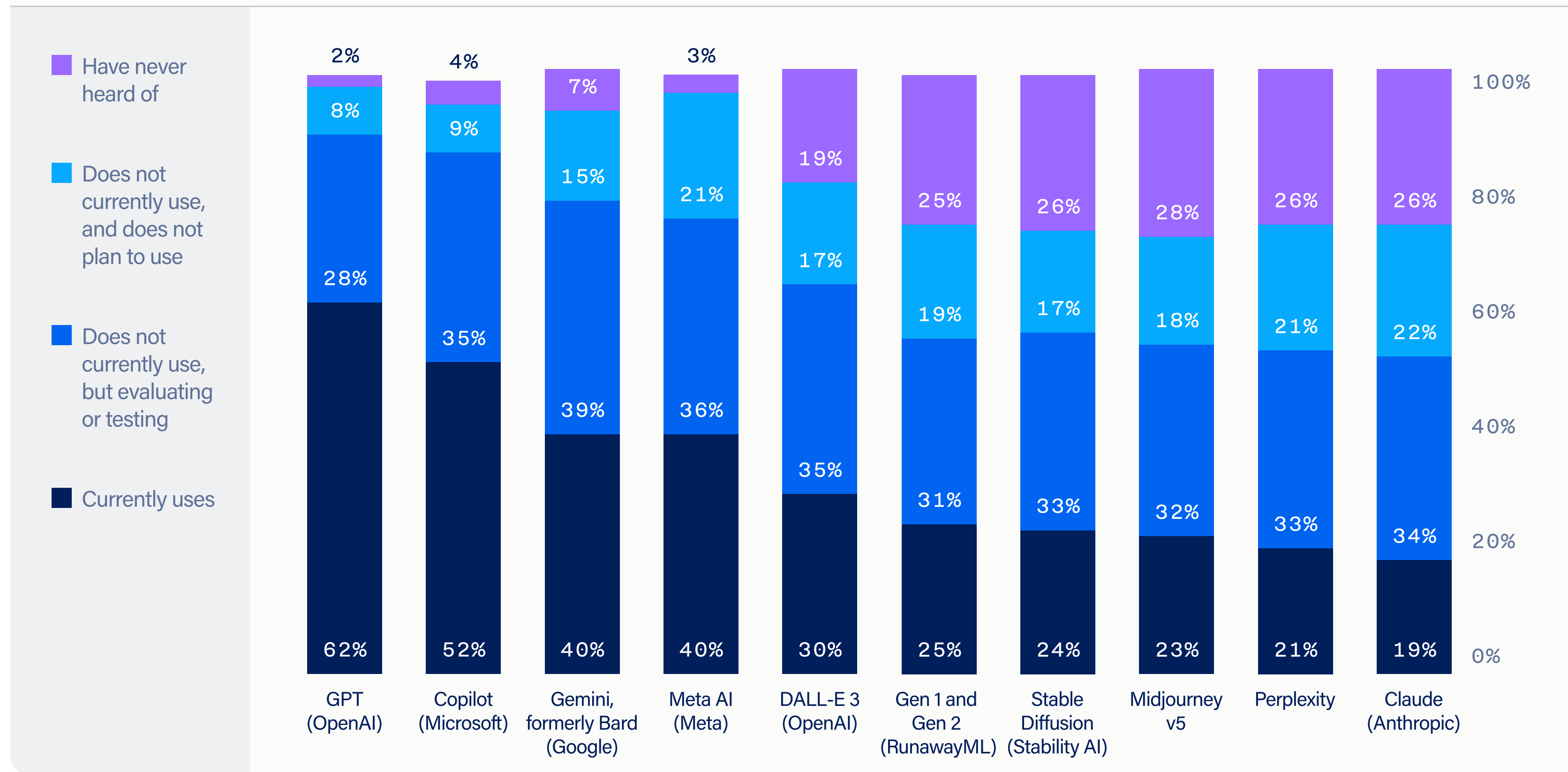
Models like GPT 4 and GPT 3.5 are still used by all sizes of organizations. The newest model, GPT 4, lags in adoption behind even GPT 3.

Q16B. You said you are using GPT (OpenAI) in your organization. Indicate all models you are using? (Note: Question wording updated in 2024)  
Total 2024 (n=306), \$50 million - less than \$250 million (n=103), \$250 million - less than \$2 billion (n=204), \$2 billion or more (n=79)

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# ChatGPT and Copilot are the Most Used Tools, with Gemini and Meta AI in the Second Tier

**Top Used Tools**  
(Among Total)



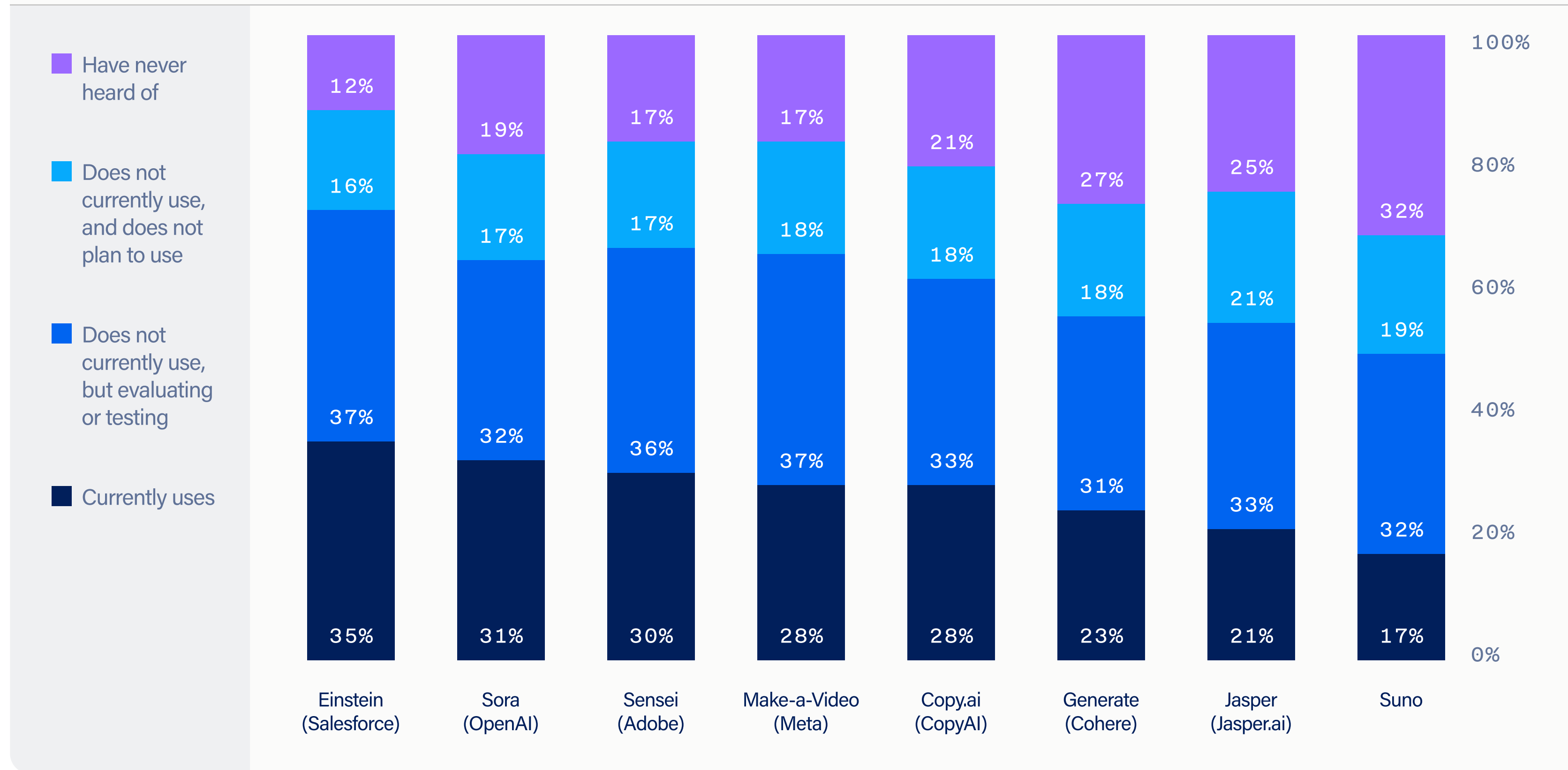
In the broad collection of products for writing, content generation, or business processes, leading products are ChatGPT, Copilot, Gemini, Meta AI, and DALL-E 3.

Q14. Please indicate your organization's use of the specific Gen AI tools listed below. (Note: Updated list of Gen AI tools in 2024)  
2024 (n=802)

Growing Up: Navigating Gen AI's Early Years." AI at Wharton in collaboration with GBK Collective, October 2024.

# Using Gen AI for Media Generation is Relatively Niche, Although Many are Evaluating or Testing

**Media Generation Tools**  
(Among Total)



In this collection of products that are used for media generation such as voice, image, or video creation, Einstein from Salesforce, Sora from OpenAI, Sensei from Adobe are used, but most are still evaluating or testing.

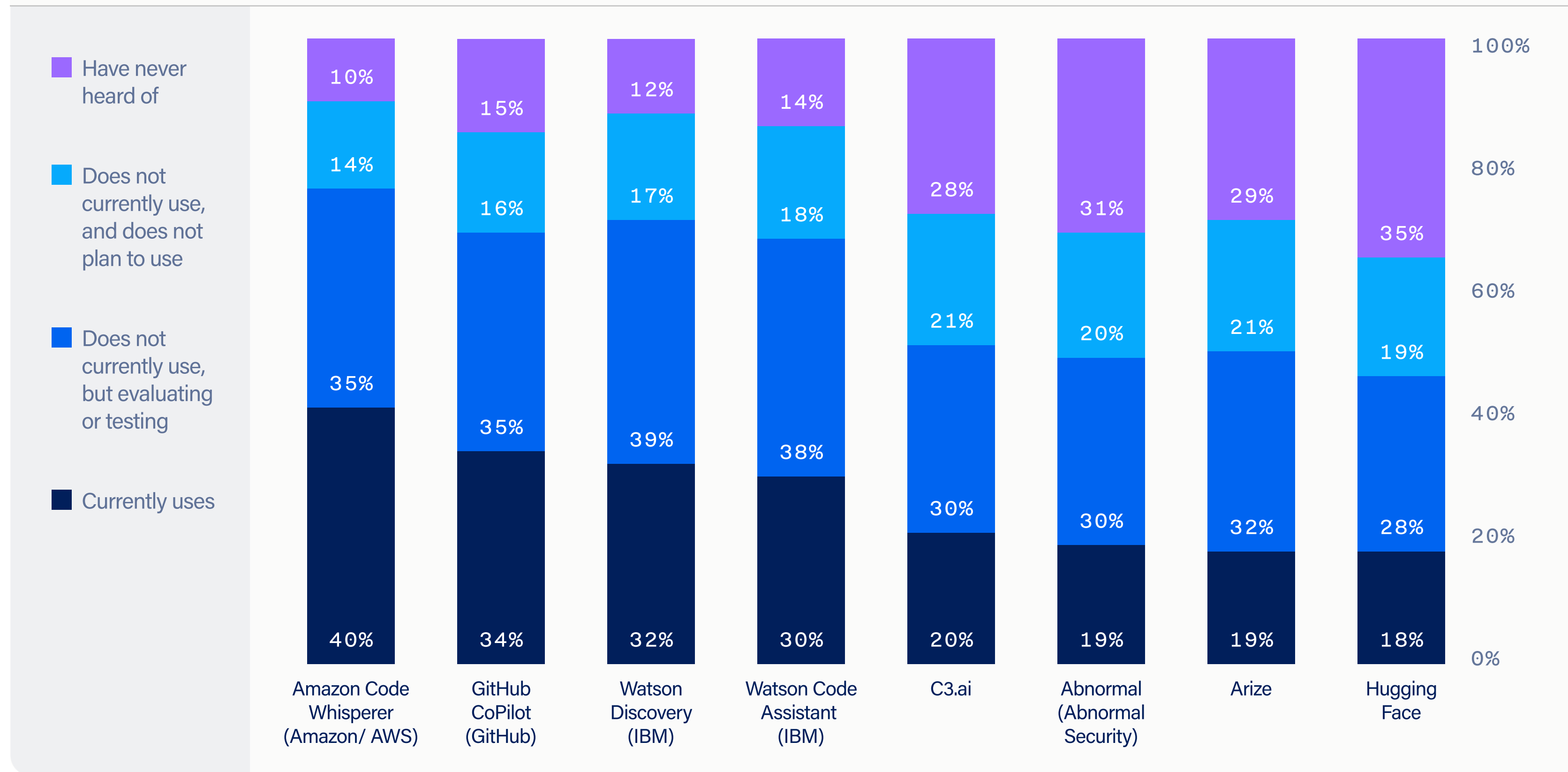
Q14. Please indicate your organization's use of the specific Gen AI tools listed below. (Note: Updated list of Gen AI tools in 2024)  
2024 (n=802)

Growing Up: Navigating Gen AI's Early Years." AI at Wharton in collaboration with GBK Collective, October 2024.



# Operational Usage is Dispersed Among the Big Players like Amazon/AWS, Microsoft, and Watson

**IT, Development, Infrastructure, & Security Tools**  
(Among Total)



In this collection of products that are used for IT, infrastructure, development, and security, Amazon/AWS Code Whisperer, GitHub Copilot, and IBM’s Watson Discovery and Code Assistance are most used.

Q14. Please indicate your organization's use of the specific Gen AI tools listed below. (Note: Updated list of Gen AI tools in 2024)  
2024 (n=802)

Growing Up: Navigating Gen AI's Early Years." AI at Wharton in collaboration with GBK Collective, October 2024.

# APPENDIX

## Notes on 2023 v. 2024 Comparisons

The 2024 survey is a follow-up of the Gen AI survey completed in the summer of 2023. Visuals are included to demonstrate differences between years, indicating percent changes between 2023 and 2024 ( $\pm$ pp) and statistical significance testing in those changes at a 95% confidence interval (\*).

While the goal of the 2024 survey is to build upon the insights generated in 2023, the 2024 survey includes additional questions, updated responses options, new functional areas, as well as other changes. This means certain questions do not track data across years. Footnotes are included in cases where a question is not able to be tracked or compared across years.

For the 2024 survey's functional areas IT and Business Intelligence were combined, as well as added Legal and Finance/Accounting.



+/-5pp shift  
from 2023



Statistically  
significant shift  
from 2023 at the  
95% C.I.

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