



## Now decides next:

Insights from the leading edge of generative AI adoption in Germany

Deloitte's State of Generative AI in the Enterprise  
Quarter one report – German Cut

April 2024



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## About The State of Generative AI in the Enterprise

To help leaders in business, technology, and the public sector track the rapid pace of generative AI change and adoption, Deloitte is conducting a series of quarterly surveys. The series is based on Deloitte's State of AI in the Enterprise reports, which have been released annually five years running. The wave one survey was fielded to more than 2,800 director-to C-suite-level respondents across six industries and 16 countries between October and December 2023. Industries included: Consumer; Energy, Resources & Industrials; Financial Services; Life Sciences & Health Care; Technology, Media & Telecom; and Government & Public Services.

## Executive Summary

### A paradoxical stance of preparedness and prudence

This detailed analysis sets its focus on Germany's unique state in the context of generative AI, providing insightful conclusions and deriving four essential questions to spark thinking for German decision-makers to unlock the full potential of generative AI.

Our study reveals Germany's cautious approach toward transforming in response to generative AI's potential. In preparedness, Germany lags globally, especially in Talent and Risk & Governance, yet surprisingly, 50% of German leaders perceive minimal threat from generative AI to their business models, contrasting notably with more anxious global views. Despite the recognition of generative AI as a crucial tool for efficiency and productivity, Germany faces certain barriers, such as a lack of technical talent and an absence of a comprehensive governance strategy. However, 91% of German businesses are expecting an increase in productivity due to widespread usage of generative AI. Generative AI's impact on workforce strategies highlights a palpable discrepancy between Germany and its international counterparts – while 67% of German leaders anticipate major shifts in talent strategy due to generative AI within two years, Germany's endeavors in reskilling and education significantly falter compared to their European and global counterparts, potentially jeopardizing Germany's competitive position.

Germany's quandary of AI preparedness presents a compelling narrative in the rapid evolution of the global AI landscape. How will Germany navigate this?

## 4+1 questions for German executives

### **How can we build generative AI expertise?**

Advocate for agility, cross-disciplinary collaboration and continuous learning to keep abreast of the rapid innovation.

### **How can we reinvent work with generative AI?**

Prioritize upskilling the current workforce and invest in educational programs to promote responsible AI use and allay fears.

### **How can we use generative AI to create strategic advantage?**

Rather than merely pursuing efficiency and cost reduction, aim for strategic advantages with generative AI.

### **How can we lay AI foundations for sustainable value generation?**

Leverage AI for comprehensive and not just task-specific progress. Embrace a holistic strategy and strong governance for safe AI deployment.

### **+ How can decision-makers positively influence AI's social impact?**

Given concerns that generative AI use could heighten power concentration and economic disparity, each leader must proactively consider how their organization's AI decisions fit into the broader context, rather than awaiting official regulatory guidance.

## Foreword

### Now decides next

The arrival of generative AI heralds disruption and opportunity across industries. Organizations are exploring how generative AI can be used to unlock business value, supercharge efficiency and productivity, and open the door to entirely new products, services and business models. As business leaders contend with this new technology and make decisions about the future of the enterprise with generative AI, it is helpful to keep one's finger on the pulse of adoption.

To that end, The State of Generative AI in the Enterprise: Now decides next, captures the sentiments of 2,835 business and technology leaders involved in piloting and implementing generative AI in their organizations. In this inaugural release of the quarterly report series, leaders expressed their excitement for using generative AI and many expect substantial transformative impact in the short term. Yet, they also acknowledged uncertainty about generative AI's potential implications on workforces and society as the technology is widely scaled, calling for greater investment in talent, governance and global collaboration.

From these wave one insights, we can gain a clearer picture of how leaders are using generative AI and the challenges and lessons learned thus far. This helps reveal some of the essential questions leaders should be asking now and actions they should be taking to prepare their enterprise for what comes next.

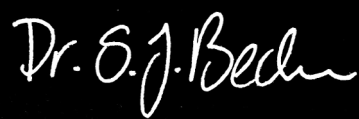
There is still much to discover with generative AI. As it matures and is deployed at scale for a litany of applications, new questions and challenges will become clearer. Our quarterly reports will be available to help you make sense of this moving space, to consider practical guidance based on what we have learned, and take a forward-looking view of your business future with generative AI.



**Dr. Björn Bringmann**



**Peter Fach**



**Dr. Sarah J. Becker**

## Introduction

### Now decides next: Insights from the leading edge of generative AI adoption



Will generative AI be the greatest, most impactful technology innovation in history? Will it completely transform how humans live and work? Or will it turn out to be just another *technology du jour* that promised revolutionary change but ultimately delivered only incremental improvement? Right now, we can't be certain.

What we do know is that many breakthrough technologies of the past have followed a common adoption pattern: initial awareness; excitement that led to hype; mild disappointment as hype met reality; and then explosive growth once the technology reached critical mass and proved its worth.

Generative AI seems to be following the same pattern, only much, much faster. ChatGPT was publicly released on November 30, 2022, largely as a technology demonstration. Two months later, it had already attracted an estimated 100 million active users – making it the fastest-growing consumer application in history.

Since then, generative AI has continued to advance by leaps and bounds and many new tools and use cases have emerged – providing a powerful glimpse at the technology's vast potential to transform how people live and work.

This report explores Germany's position, deriving key findings and addressing important questions. We encourage the interested reader to have a look at [Deloitte's State of Generative AI in the Enterprise Quarter one report, January 2024](#) for the global report.



## Introduction

# High expectations of generative AI overshadow preparedness in Germany

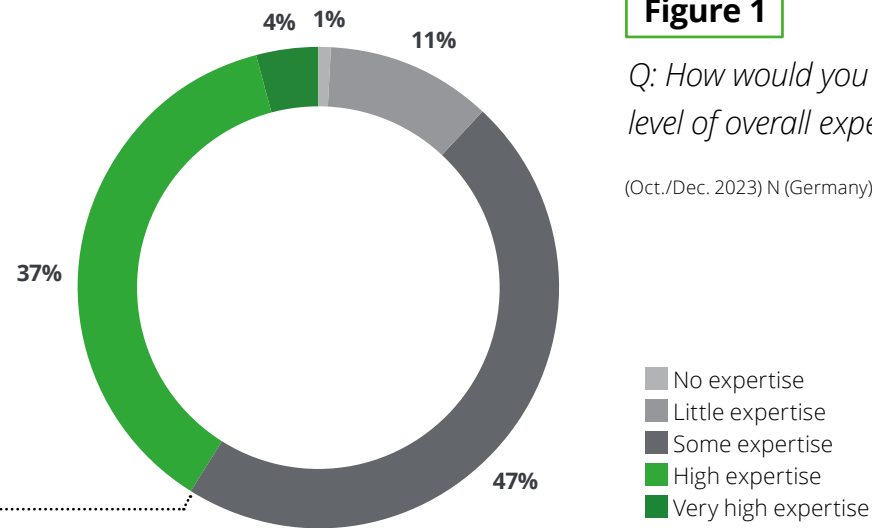
As generative AI continues to redefine the capabilities of technology, nearly 75% of business leaders in Germany are bracing for substantial transformation within their organizations in the next three years. This significant foresight is bolstered by robust financial commitment, with 78% planning to boost investment, with 33% of them eyeing increases of 20% or more.

But despite the high expectations and planned investment, a palpable sense of readiness is lacking. Just 27% of German leaders feel 'highly' or 'very highly' prepared for generative AI incorporation, presenting a stark contrast to the 41% who confidently rate their organization's generative AI expertise as high or very high, similar to the 45% globally (figure 1). This disparity between expectations, financial commitments, and perceived readiness underlines the critical challenges German business must confront in the dynamic world of AI.

## Self-assessed expertise with generative AI runs high amongst German respondents

**41%**

rate their organization's generative AI expertise as high or very high, but is such expertise even possible given the pace of the technology's advancement



**Figure 1**

Q: How would you assess your organization's current level of overall expertise regarding generative AI?

(Oct./Dec. 2023) N (Germany) = 150, N (Total) = 2,835



## Now: Key findings

This first pulse of our generative AI quarterly surveys included more than 2,800 AI-savvy business and technology leaders directly involved in piloting and implementing generative AI at major organizations around the world, including 150 leaders in Germany. This chapter highlights aspects relevant to German organizations and supplements the global report [Deloitte's State of Generative AI in the Enterprise Quarter one report, January 2024](#).

**Now:** Key findings

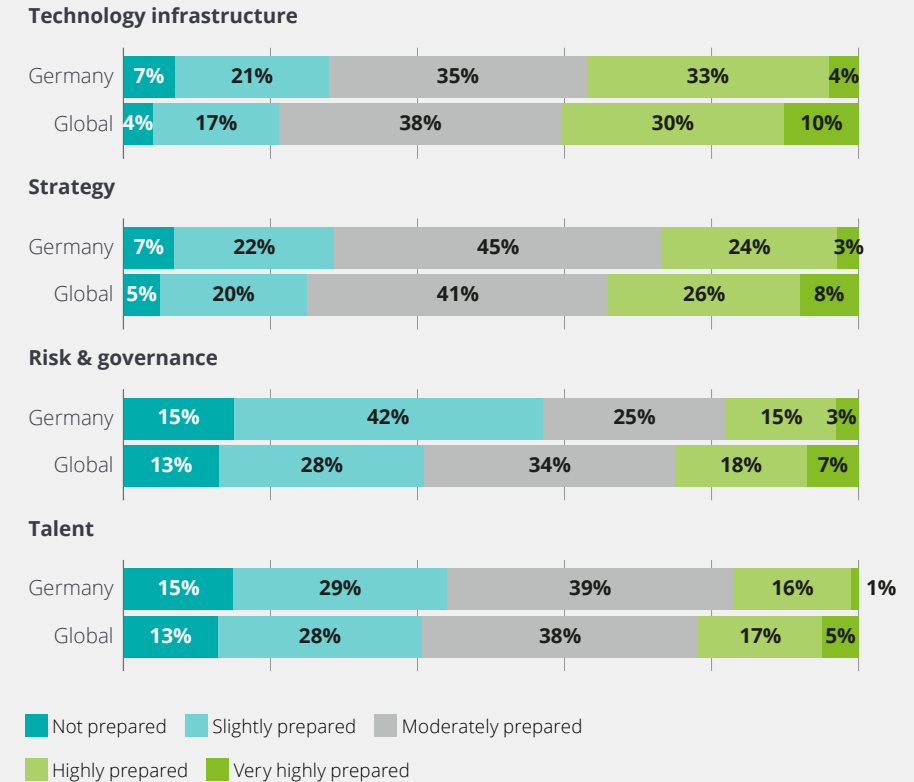
# 1 AI preparedness assessment reveals Talent and Risk & Governance as key challenges

As we progress further into our exploration of global generative AI adoption, globally, this section specifically evaluates the state of preparedness across various organizational facets, including Talent, Technology Infrastructure, Strategy, and Risk & Governance.

German organizations reported varied levels of readiness for generative AI adoption across the different areas. Both globally and in Germany organizations report comparatively high levels of preparedness in the areas of Technology Infrastructure and Strategy. When it comes to technology infrastructure, 72% of German organizations and 78% globally felt at least moderately prepared. This is in strong contrast to both Talent and Risk & Governance. In terms of Talent 44% of German respondents felt slightly or not prepared. Risk & Governance paints a similar picture, where 57% (compared with 41% globally) are slightly or not prepared (figure 2). In both areas Germany is lagging behind global counterparts, showing significant potential for improvement.

In conclusion, while German organizations denote a mixed sense of readiness for generative AI adoption, they generally reflect a more watchful stance than their global counterparts. Their highest confidence lies in Tech Infrastructure, and their biggest concerns in Talent and Risk & Governance. As AI use becomes a global imperative, it will be intriguing to follow how German organizations navigate these challenges and adjust their strategies.

## Preparedness



**Figure 2**

*Q: Consider the following areas. For each, rate your organization's level of preparedness with respect to broadly adopting generative AI tools/applications?*

(Oct./Dec. 2023) N (Germany) = 150, N (Total) = 2,835



**Now:** Key findings

# 1 German confidence stands out amid global uncertainty about generative AI

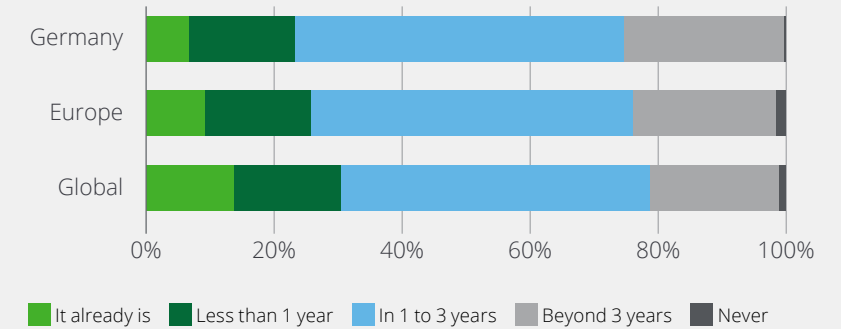
As generative AI continues to advance, perceptions of its potential impact on business models diverge.

German leaders consider the threat level as least concerning, with 50% of respondents believing that there is little or no threat, the highest level of assurance among all surveyed countries. Indeed, only 15% of respondents from Germany see a significant threat, the lowest figure of all countries surveyed. This confidence stands in marked contrast to the rest of Europe and the global figures, where an identical 35% see limited threat but a closely matched 20% (Europe) and 21% (globally) anticipate substantial implications. In contrast, respondents from other European countries like Spain (28%), the Netherlands (28%), and Switzerland (30%) appear more apprehensive (figure 4), perceiving a substantial threat from generative AI to their business model.

German leaders, having expressed an impressively low level of concern regarding the threats of generative AI to their business models, similarly project a restrained timeline for its substantial transformative impact on their own organizations. With just 7% expecting immediate changes, 23% within a year, and 75% over three years, Germany's projections trail slightly behind Europe's 9%, 26%, and 76%, which are again lower than the global projections of 14%, 30%, and 79% (figure 3).

While this progressive stance underlines Germany's prudence, it could potentially challenge its competitive positioning, given the accelerated pace of AI adoption globally and within Europe.

## Transformation potential



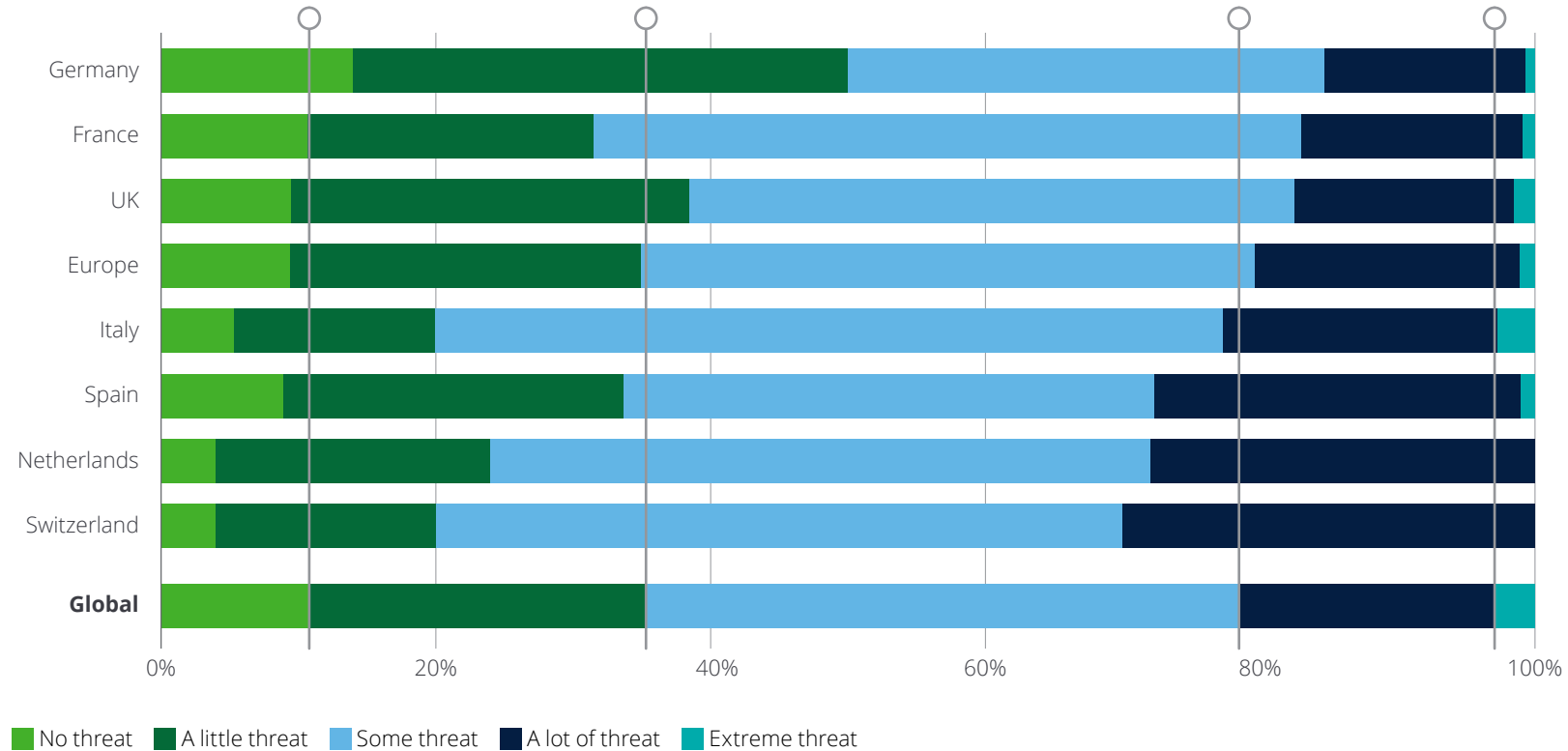
**Figure 3**

*Q: Transformational potential: When is generative AI likely to substantially transform your organization, if at all?*

(Oct./Dec. 2023) N (Germany) = 150, N (Total) = 2,835

**Now:** Key findings

# 1 Under how much threat is your current business model?



German respondents feel **least threatened by generative AI**, while simultaneously being **less prepared than the global average** in all four surveyed areas.

**Figure 4**

Q: Under how much threat is your organization's current business/operating model from the widespread adoption of generative AI tools/applications?

## 2 Current generative AI efforts prioritize efficiency and cost reduction over innovation and growth

The benefits that businesses in Germany and globally aspire to achieve through their generative AI efforts are noticeably similar, aligning around three principal themes – improving efficiency and productivity, reducing costs, and encouraging innovation and growth.

Recording the highest number observed at 67%, the enhancement of efficiency and productivity emerges as the most desired benefit of generative AI for German companies. Globally too, companies share this aim, albeit at a slightly lower percentage of 56% (figure 5). AI technology enables automation, precision, and quicker operations, inherently catalyzing increased productivity and efficiency.

Reducing costs is the second key benefit German companies see in generative AI, with 41% leaning towards this outcome. Again, this holds true globally, but to a slightly lesser extent at 35%. By streamlining operations and melding human labor, generative AI has the potential to significantly reduce overhead and operational costs.

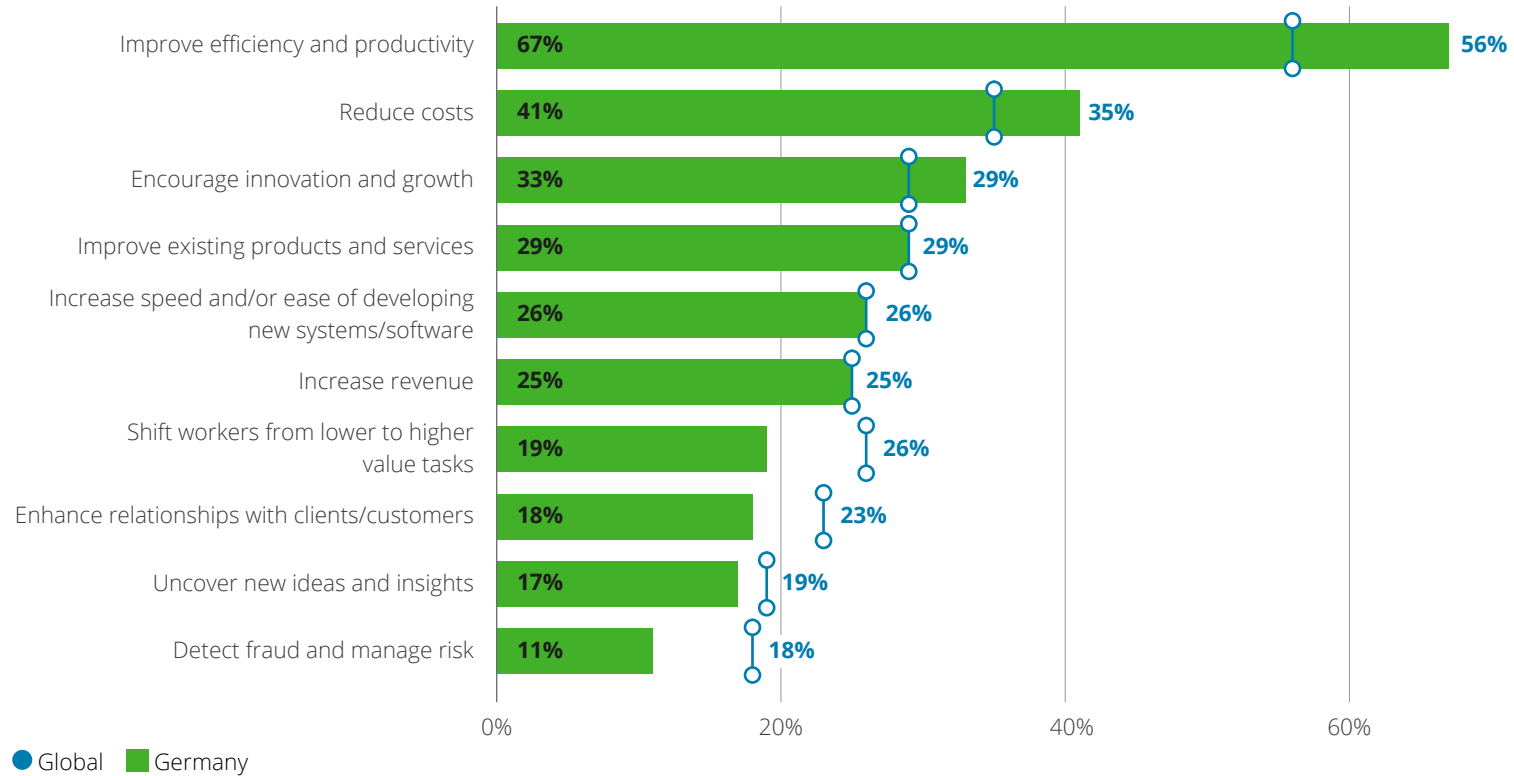
Innovation and growth, despite noticeably trailing in emphasis compared to efficiency and cost reduction, still forms the third crucial ambition with 33% of respondents in Germany and 29% of respondents globally aiming for this outcome through generative AI. This is fitting since AI is, in essence, an engine for innovation, offering unique strategies for problem-solving, accelerating business growth, and affording a competitive advantage.

Despite the transformative potential of generative AI, German businesses seem to adopt a remarkably cautious approach, prioritizing efficiency and cost reduction over innovation and growth.



Now: Key findings

## 2 Key benefits executives hope to achieve through generative AI



**Figure 5**

Q: What are the key benefits you hope to achieve through your generative AI efforts?

**Now:** Key findings

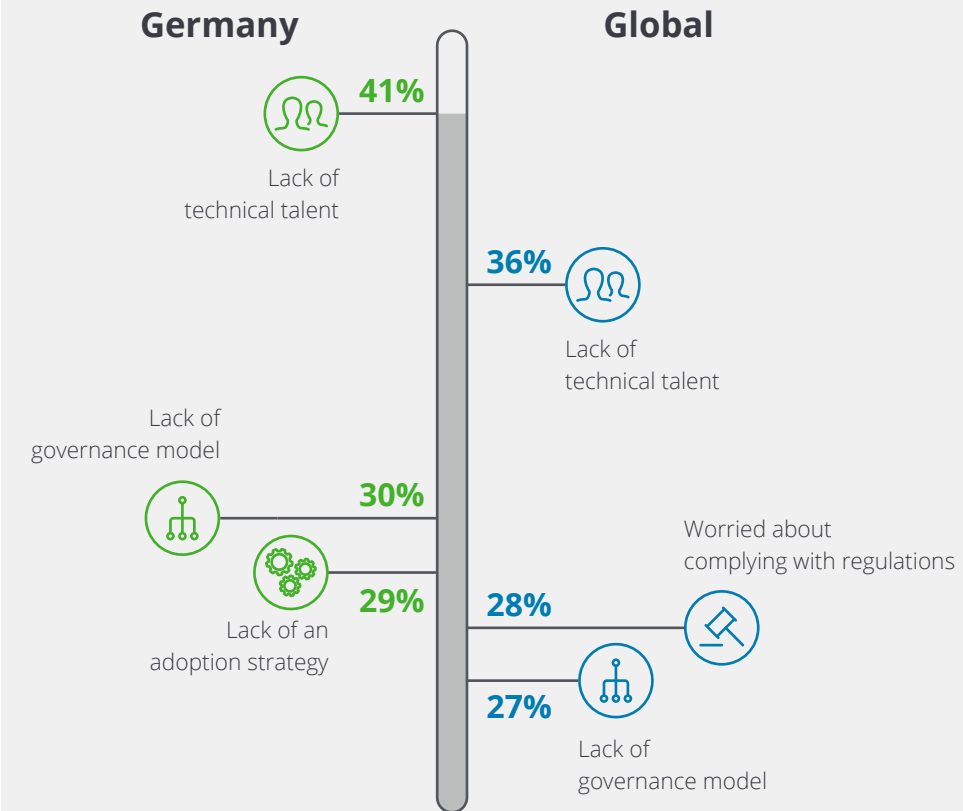
## 2 Overcoming technical talent gap and governance model deficiencies

In Germany, the three primary obstacles to AI adoption, as reported by organizations, are Lack of technical talent (41%), Lack of governance model (30%), and Lack of an adoption strategy (29%) (figure 6). This indicates a strong need for organizations to invest in staff training and development for AI technologies. Furthermore, the development of a comprehensive governance model and a strategic adoption plan are key prerequisites to successfully leveraging AI's capabilities.

On a global scale, the challenges mirror those in Germany, albeit with some variation. Across the globe, the Lack of technical talent (36%) is a mutual concern, underlining the global need for skilled AI professionals. The second-most prominent challenge is the worry about complying with regulations (28%), hinting at the complexity of the regulatory environment surrounding generative AI. Lastly, global organizations echo Germany's concern about the Lack of a governance model (27%), once again demonstrating the need for a structured framework to guide AI adoption.

These findings reinforce the notion that while the potential benefits of AI are widely acknowledged, there are significant barriers to its implementation which need to be addressed. To ensure successful AI adoption, it is critical for organizations, both in Germany and globally, to tackle these barriers proactively and strategically.

### Top 3 barriers of adaption



**Figure 6**

Q: What, if anything, has most held your organization back in developing and deploying generative AI tools/applications?

(Oct./Dec. 2023) N (Germany) = 150, N (Total) = 2,835



## Generative AI: Have we seen this movie before?

The term “unprecedented” is often thrown around when talking about business and technology, to the point of being cliché. However, in describing the pace of generative AI’s emergence and advancement – and its massive potential impact on business (and humanity as a whole – unprecedented could be an understatement.

Generative AI is already widely available to the public and has a running start toward critical mass. And similar to smartphones, it’s easy for an average person to use without much training – and can help with activities they already engage in every day – so the barriers to adoption are low. What’s more, generative AI has the strong potential to assist with its own future development, which could trigger a cycle of exponential improvement at exponential speed.

Generative AI’s speed factor may give organizations less time to ruminate or dabble with small-scale pilots – while reducing the margin for error – and increasing the consequences of inaction. It also creates opportunities to generate extraordinary business value very quickly.

Despite generative AI’s greatly accelerated pace, understanding typical adoption patterns based on previous breakthrough technologies can provide valuable lessons that leaders can use to help them understand and fully capitalize on the technology’s rapid advancement.

As in the past, organizations’ initial efforts will likely center around efficiency, productivity, cost savings and other incremental improvements. This is expected to help the workforce get accustomed to using generative AI, and will show people how it can help make their jobs

easier. Early wins will also likely help produce cost savings and momentum that can be channeled into higher value opportunities that are more strategic and differentiated in nature, such as enabling new products, services, business models and ways of working that simply weren’t possible before generative AI.

**Now:** Key findings

### 3 Generative AI sparks changes in global talent and workforce strategies

Generative AI holds the potential to augment human efforts across a broad range of traditionally human-exclusive tasks, with substantial implications for talent and workforce strategies.

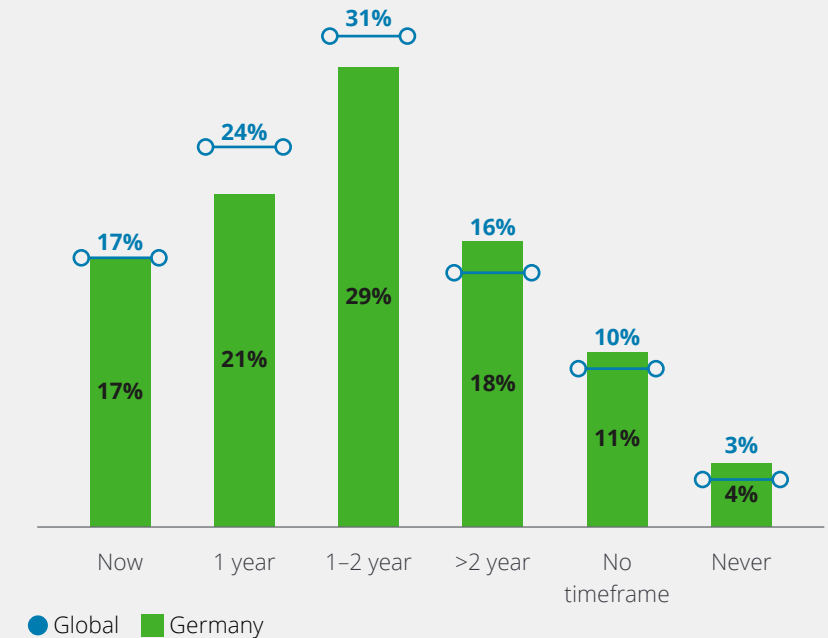
Indeed, this significant shift is recognized by 71% of global leaders who are proactively adapting their talent strategies in response to generative AI's impact within two years. While slightly trailing, Germany is not far removed, with 67% of its leaders anticipating these shifts in the next two years (figure 7). This discrepancy indicates nuanced differences in views on the urgency and extent of AI-propelled transformation between Germany and the broader global landscape.

Assessing German companies' efforts in reskilling workers, enhancing workforce education, and recruiting technical talent in response to generative AI reveals a certain level of recognition for the need to adapt. However, there are some signs of Germany lagging behind. For instance, in reskilling efforts, only 23% of German leaders report making substantial strides, behind the European and global averages of 29% and 36% (figure 8).

Similarly, the endeavour to educate the workforce sees only 30% of German leaders reporting considerable strides – a figure somewhat lacking compared to 33% of European leaders, and a 40% global average. The approach to recruiting technical talent further indicates a less urgent response, as German leaders, at 37%, match the European average of 36%, but fall short of the global average of 42%.

This measured response, however, may impact Germany's position in the rapidly evolving AI landscape if not addressed.

### Talent strategy



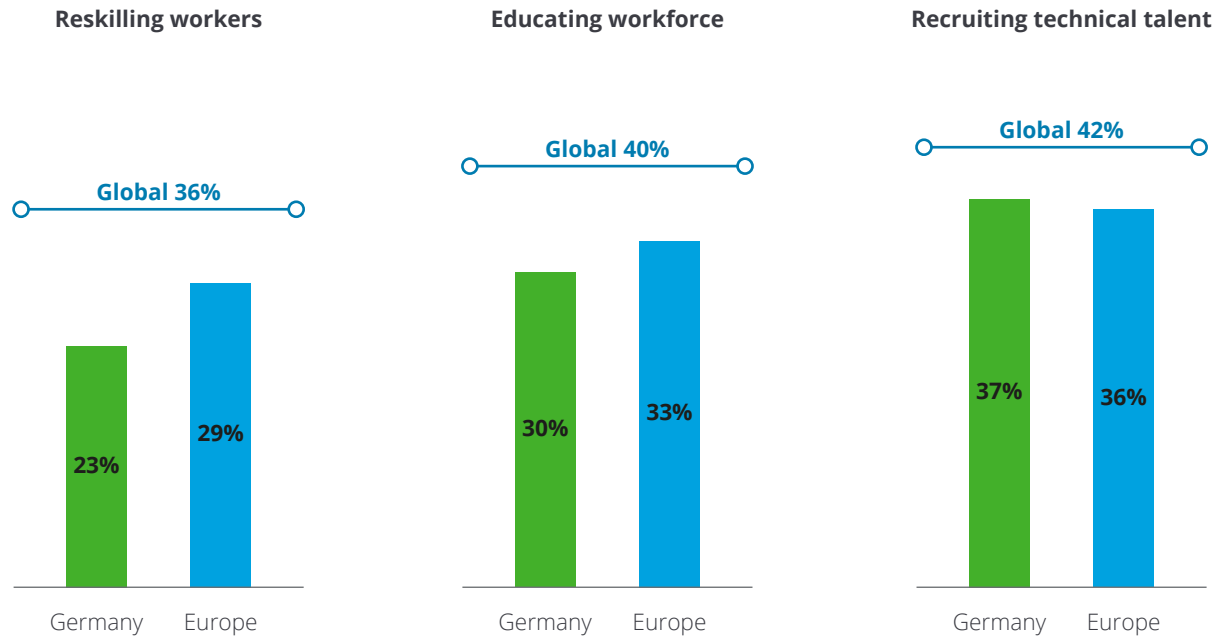
**Figure 7**

*Q: When do you expect to make changes to your talent strategies because of generative AI? (e.g., shifting skill profiles for jobs, recruiting strategies, etc.)*

(Oct./Dec. 2023) N (Germany) = 150, N (Total) = 2,835

**Now:** Key findings

# 3 How is your organization preparing your workforce to stay on top of generative AI developments?



**Figure 8**

Q: What level of effort is your organization making regarding the following workforce related areas?  
(Respondents selecting 'High' or 'Very high level of effort')

(Oct./Dec. 2023) N (Germany) = 150, N (Total) = 2,835



**Now:** Key findings

### 3 Generative AI might increase societal imbalances

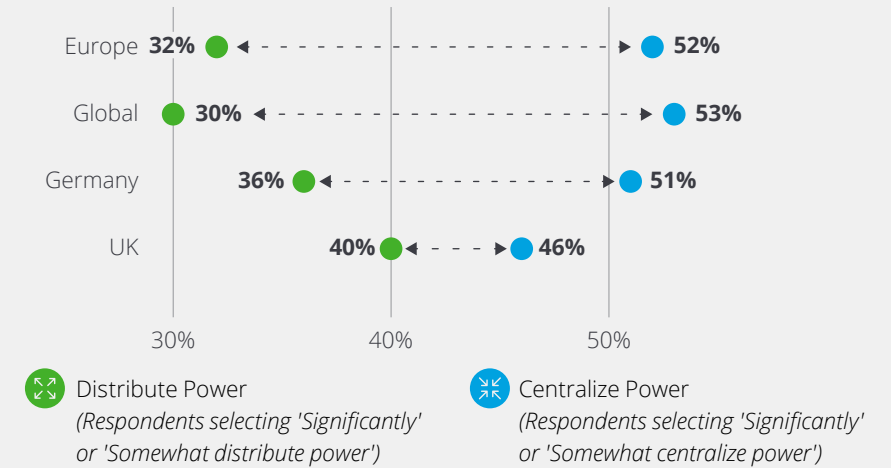
The survey delivers intriguing insight into how leaders envision the societal impacts of generative AI, focusing particularly on the shift in power dynamics within the global economy and existing economic inequality levels.

In assessing the impact of generative AI on the global economy's power distribution, German leaders' perspectives are split. A slightly larger group, 51%, foresees power becoming more centralized, while 36% predict that generative AI will disperse power, closely mirroring the worldwide pattern of 53% and 30% respectively (figure 9). The UK underscores an interesting deviation, with the highest number of leaders predicting power distribution (40%) and the lowest foreseeing centralization (46%) among all surveyed countries.

Despite the UK's relatively balanced perspective, the fact remains that even there, leaders expecting power centralization still outnumber those predicting dispersal. When examining the impact of generative AI on economic inequality, it's evident that more than half of German leaders (52%) and global leaders (51%) project an increase in this disparity. Conversely, a smaller group of German (22%) and global leaders (21%) foresee a reduction in economic inequality due to advancement of generative AI. When examining country-specific perspectives, however, differences emerge. The highest anticipation of decrease in inequality comes from India where 38% of leaders hold this view, but this remains lower than the 39% of Brazilian leaders, the lowest amongst all countries surveyed, who predict an increase in inequality. This shows that even in regions where leaders are most optimistic about generative AI decreasing inequality, they are outnumbered by those foreseeing an increase.

Concerns about generative AI increasing economic inequality and power centralization exist globally, and notably in Germany. The data suggests that even in optimistic scenarios, precautions are needed to prevent these potential adversities.

### Distribution of power



**Figure 9**

Q: How will widespread use of generative AI tools/applications impact global levels of economic inequality?

(Oct./Dec. 2023) N (Germany) = 150, N (Total) = 2,835

**66%**

of respondents in Germany, the lowest percentage globally, see the necessity for more AI regulation with the widespread use of generative AI applications.





## Next: Looking ahead

As the first in an ongoing series of quarterly surveys to track the pulse of generative AI, this initial effort was designed to establish a strong baseline to build on. Our objective is to understand how generative AI adoption is unfolding – and to anticipate where it’s headed. Throughout this report we posed a number of strategic questions to help organizations think critically about how the actions they take now will best set the stage for what comes next. We don’t have definitive answers to every issue, but we can put forward some questions to spark thinking and some practical guidance based on what we’ve learned so far. We will also point out that the pace at which AI and specifically generative AI is moving, definitive answers that make sense today may not be relevant in a few months.



**Next:** Looking ahead




## + How can my organization build generative AI **expertise** when things are moving so quickly?

German respondents assess their organizations' preparedness lower than the global average in all areas examined. In the race to deploy generative AI solutions, organizational attributes such as adaptation, experimentation, agility and active collaboration with partners will be essential. Innovation is too swift to pick today's clear winner. The key is to experiment and maintain a beginner's mindset—the belief that no matter how expert you think you are, there will always be much more to learn—even as your experience grows. Coordinating carefully across your organization and leading with a cross-disciplinary approach will be necessary to successfully navigate generative AI transformation amid rapid change.

## ••• How can we best invest in our **people** and reinvent how they work with generative AI?

Lack of technical talent was pegged as the largest barrier to generative AI adoption, a gap German respondents perceive as particularly critical. Surmounting this calls for measures beyond just recruiting new talent and empowering the existing workforce, and extends to elevating generative AI literacy throughout the organization. To speed up adoption and fully harness the potential of generative AI, it's essential to invest in people both developing and using generative AI. Such investment should include comprehensive, skill-enhancing educational programs that endorse responsible use, and address and allay common fears and misconceptions concerning AI.



**Next:** Looking ahead

+

## How can our organization use generative AI to create **strategic advantage**?

Current generative AI efforts both in Germany and globally prioritize efficiency and cost reduction over innovation and growth. Targeting productivity gains does not suffice to maximize the technology's value. Instead, consciously focus on innovation and differentiation—customizing your organization's generative AI solutions to fit its unique needs and data assets, with the goal of building capabilities that create sustainable competitive advantage. Pursuing easy opportunities and quick wins is smart, but not at the expense of more strategic opportunities. Strive to develop platform capabilities for multiple use cases and consider a deliberate reinvestment strategy for generative AI dividends, since these steps are crucial in paving the path for continued success.

•••

## How can we best **scale up** and build a foundation for sustainable value creation?

German respondents have ranked the lack of governance models and adoption strategies as top barriers to adoption, after tech talent. They are, however, crucial to scaling up generative AI and harnessing transformation potential. Since the most valuable use cases will likely change over time, becoming an AI-fueled organization calls for a focus on improving end-to-end processes, not just narrow tasks. To that end, consider deploying AI broadly across your enterprise as part of a holistic strategy and providing consistent governance and risk management to ensure models produce safe and trustworthy outputs and content.

## Authorship & Acknowledgements

### Authorship



**Dr. Björn Bringmann**

Managing Director  
Lead Deloitte AI Institute,  
Germany  
[bbringmann@deloitte.de](mailto:bbringmann@deloitte.de)

Björn is a Managing Director at Deloitte with over two decades' experience in artificial intelligence and digital transformation. He supports clients globally and across industries, from AI strategy to AI implementation, for sustainable growth.



**Peter Fach**

Partner  
Lead GenAI Market Activation,  
Germany  
[pfach@deloitte.de](mailto:pfach@deloitte.de)

Peter leads our teams that develop software products and platforms. He acts as the business sponsor for Deloitte CAMPfire, a marketplace for digital assets which we deploy for clients to scale and monetize their AI & software developments.



**Dr. Sarah J. Becker**

Partner  
Lead Digital Ethics,  
Germany  
[sarbecker@deloitte.de](mailto:sarbecker@deloitte.de)

Sarah leads the Digital & AI Ethics practice at Deloitte. For more than 15 years she has supported DAX companies, family businesses, non-profit organizations and public institutions in their digital transformation. She is a renowned expert in strategies and programs to operationalize digital ethics and AI governance.



**Maria Schamberger**

Senior Manager  
Deloitte AI Institute,  
Germany  
[mschamberger@deloitte.de](mailto:mschamberger@deloitte.de)

Maria is a Senior Manager at the Deloitte AI Institute in Germany. She supports organizations in their successful transformation in the age of AI and in holistically improving their AI readiness.



**Philipp Wendland**

Senior Consultant  
Deloitte AI Institute,  
Germany  
[pwendland@deloitte.de](mailto:pwendland@deloitte.de)

Philipp is a Senior Consultant at the Deloitte AI Institute in Germany. He has a strong technical background and focuses on the intersection of management and technology.



**Jens Burtscheidt**

Consultant  
Deloitte AI Institute,  
Germany  
[jburtscheidt@deloitte.de](mailto:jburtscheidt@deloitte.de)

Jens is a Consultant at the Deloitte AI Institute in Germany, focusing on the strategy and business side of AI solutions.

## Authorship & Acknowledgements

### Acknowledgements

Firstly, we would like to thank the authors of the global version of [Deloitte's State of Generative AI in the Enterprise](#), Quarter one report (in alphabetical order): Beena Ammanath, Deborshi Dutt, Costi Perricos, and Brenna Sniderman.

For the creation of the German cut, we would like to thank our German colleagues (in alphabetical order) for the discussion on our findings: Anica Buchholz, Ralf Esser, Isabel Gadea, Markus Goetz, Lovis Heinrich, Tamas Kiss, and Alexander Mogg.

Finally, the authors would like to thank the many talented professionals who brought this research to life: Joe Ucuzoglu, Nitin Mittal, Kevin Westcott, Lynne Sterrett, Rod Sides, Dina Tallarico, David Jarvis, Jeff Loucks, Ahmed Alibage, Natasha Buckley, Jonathan Holdowsky, Siri Anderson, David Levin, Joe Mariani, Sandeep Vellanki, Rajesh Mediseti, Shubham Oza, Gerson Lehrman Group (GLG), Lena La, Kate Schmidt, Ivana Vucenovic, Sharonjeet Meht, Bryan Furman, Lesley Stephen, Stephanie Anderson, Steve Dutton, Justin Joyner, Jordan Garrick, Karen Hogger, Matt Lennert, Maria Fernanda Castro, Tracy Fulham, Jose Porras, Jonathan Pryce, Sourabh Yaduvanshi, Jessi Hendon, Jamie Palmeroni-Lavis, Melissa Neumann, Tatum Hoehn, Sean Benton, Eric Alons-Cruz, Lancy Jiang, Amber Bushnell, Brandon Gomez, Judy Mills, Marianne Wilkinson, Lou Ghaddar, Lisa Iliff and Michael Lim.

### + About Deloitte's AI Institute

The Deloitte AI Institute™ helps organizations connect all the different dimensions of the robust, highly dynamic and rapidly evolving AI ecosystem. The AI Institute leads conversations on applied AI innovation across industries, using cutting-edge insights to promote human-machine collaboration in the Age of With™.

The Deloitte AI Institute aims to promote dialog about, and development of, artificial intelligence, stimulate innovation, and examine challenges to AI implementation and ways to address them. The AI Institute collaborates with an ecosystem composed of academic research groups, startups, entrepreneurs, innovators, mature AI product leaders and AI visionaries to explore key areas of artificial intelligence including risks, policies, ethics, future of work and talent, and applied AI use cases. Combined with Deloitte's deep knowledge and experience in artificial intelligence applications, the institute helps make sense of this complex ecosystem to deliver impactful perspectives that help organizations succeed by making informed AI decisions.

### + About the Deloitte Center for Integrated Research

The Deloitte Center for Integrated Research (CIR) offers rigorously researched and data-driven perspectives on critical issues affecting businesses today. We sit at the center of Deloitte's industry and functional expertise, combining the leading insights from across our firm to help leaders confidently compete in today's everchanging marketplace.





## Methodology

To obtain a global view of how generative AI is being adopted by organizations at the leading edge of AI, Deloitte surveyed 2,835 leaders between October and December 2023. Respondents were senior leaders in their organization and included board and C-suite members, and those at the president, vice president and director level. The survey sample was split equally between IT and line-of-business leaders. Sixteen countries were represented: Australia (100 respondents), Brazil (115 respondents), Canada (175 respondents), France (130 respondents), Germany (150 respondents), India (200 respondents), Italy (50 respondents), Japan (100 respondents), Korea (11 respondents), Mexico (101 respondents), Netherlands (75 respondents), Singapore (76 respondents), Spain (101 respondents), Switzerland (50 respondents), the United Kingdom (200 respondents), and the United States (1,201 respondents).

All participating organizations have one or more working implementations of AI being used daily. They also have pilots in place to explore generative AI or have one or more working implementations of generative AI being used daily. Respondents were required to meet one of the following criteria with respect to their organization's AI and data science strategy, investments, implementation approach, and value measurement: they influence decision-making, are part of a team that makes decisions, are the final decisionmaker, or manage or oversee AI technology implementation.

All statistics noted in this report and its graphics are derived from Deloitte's first quarterly survey, conducted October – December 2023; The State of Generative AI in the Enterprise: Now decides next, a report series. N (Total leader survey responses) = 2,835.





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