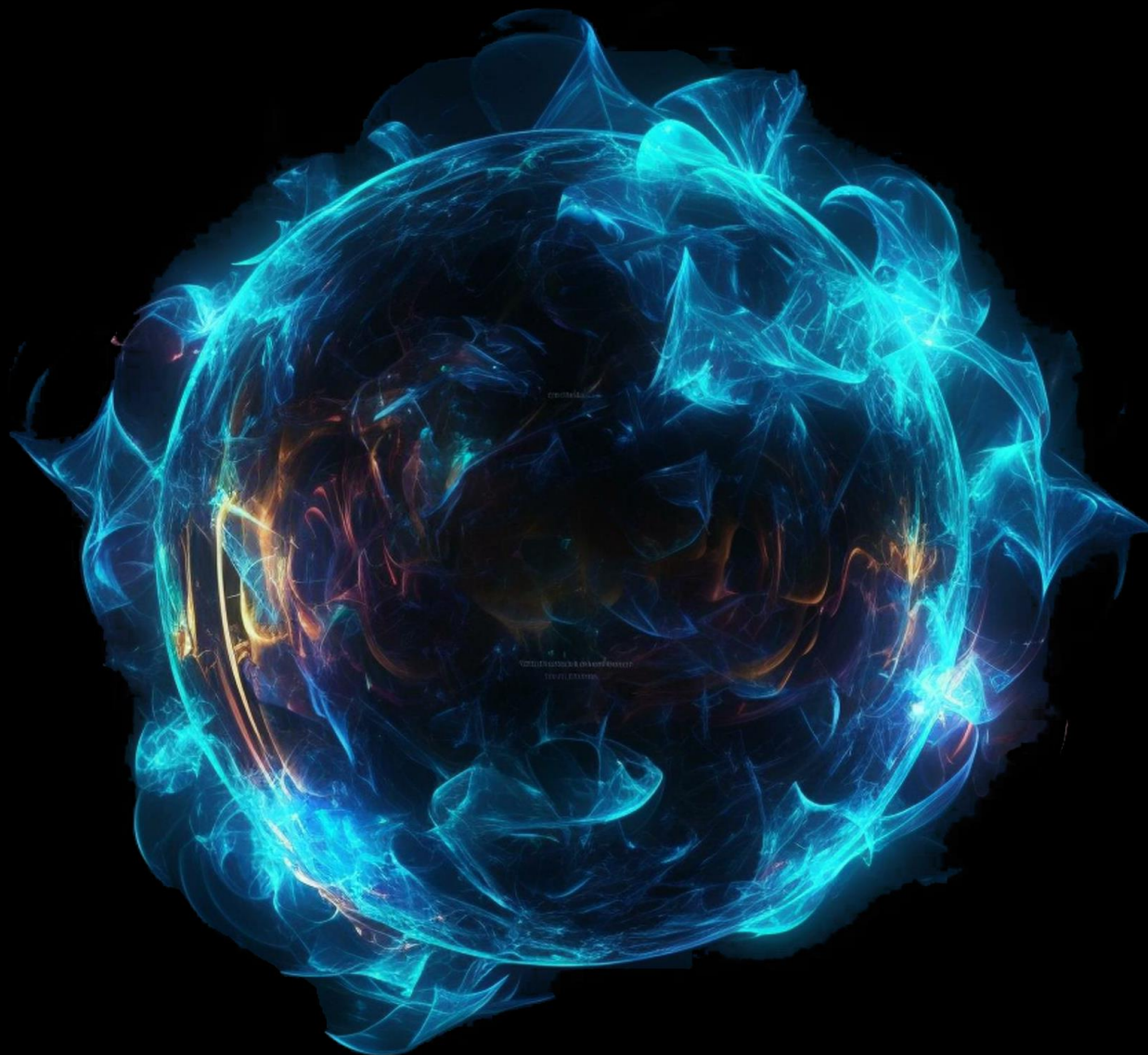


Deloitte.



GLOBAL AI Driven Organization Survey | 2024

The maturity level of companies in the
transformation driven by artificial intelligence





The term "AIDO" refers to business organizations that integrate AI into decision-making and operational processes, with the goal of improving efficiency and increasing margins and revenues. These companies exploit their information assets to optimize processes and make more informed decisions, based on data analysis. For AIDOs, the adoption of AI is an essential step, not simply an opportunity.

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AI, the future is today: the transformation that revolutionizes your business

We are pleased to share the results of our study, based on the contribution of the many clients who participated in the Survey carried out by the **AI Driven Organization** (AIDO) center of excellence of Deloitte Italy. The goal is to understand the level of maturity of companies in integrating AI solutions within their processes and corporate culture. The data collected allowed us to delve deeper into the advantages, challenges and trends in the five areas of evaluation of our proprietary AIDO framework: strategy, people, process, data and technology.

We led and coordinated the launch of the Survey for **Deloitte's entire global network**, providing methodological and organizational support to understand to what extent and how companies are leveraging data and AI to improve decision-making processes. Representatives of **over 500 companies in 14 countries**, belonging to **different sectors and industries**, responded to the Survey. The analysis shows a growing awareness of the opportunities offered by **AI in generating value**, maintaining **competitiveness** and increasing **efficiency**.

To address the **business challenges** of rising **operating costs** and changes in the ecosystem in which companies operate (customers, suppliers, business partners and competitors), it is essential to adopt methodologies that innovate traditional approaches, going beyond the experimental phase and pilot projects to large-scale implementations.

We take this opportunity to **thank** our **colleagues** and our **customers** from Italy, Poland, Bulgaria, France, Turkey, Azerbaijan, Georgia, Sweden, Denmark, Romania, Croatia, New Zealand, Hungary and Switzerland for **contributing** to this important research and analysis work.



Alfredo Maria Garibaldi
AI & Data Leader for
Deloitte Central
Mediterranean

Artificial intelligence is the ability of a computer to mimic human intelligence, opening up new opportunities for problem-solving. At the moment, AI represents one of the most innovative and promising technological solutions of our time. Its use is widespread in numerous sectors, including finance, logistics, manufacturing and healthcare, contributing significantly to targeted actions along the value chain. For example, it is used for the creation of innovative products and for the automation of complex processes.

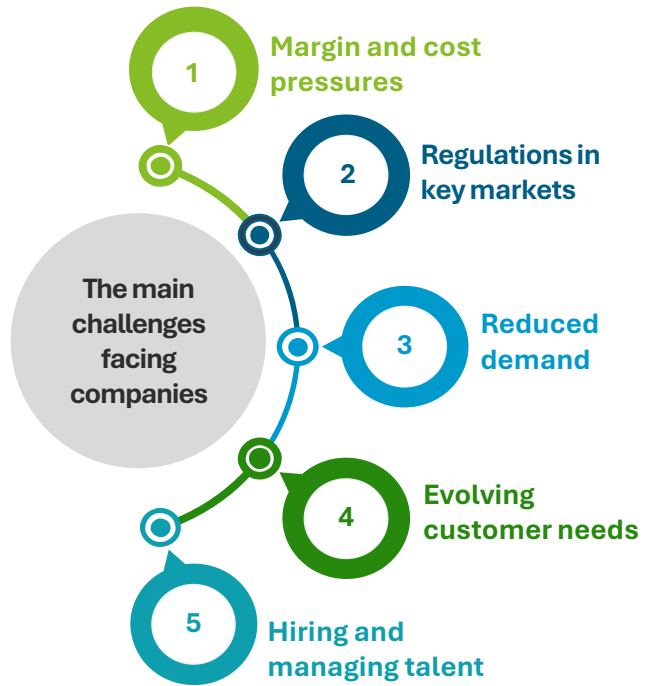
AI, A COMPLEX EVOLUTIONARY LEAP

Being an **early adopter** allows you to anticipate trends, launch **innovative services**, consolidate your market **reputation** and therefore seize the opportunities it can offer in advance. On the other hand, you will need to face possible **obstacles** that may arise when traveling unexplored paths. A structured and guided approach is key to addressing these challenges during AI-driven transformation processes

From Market Trends...

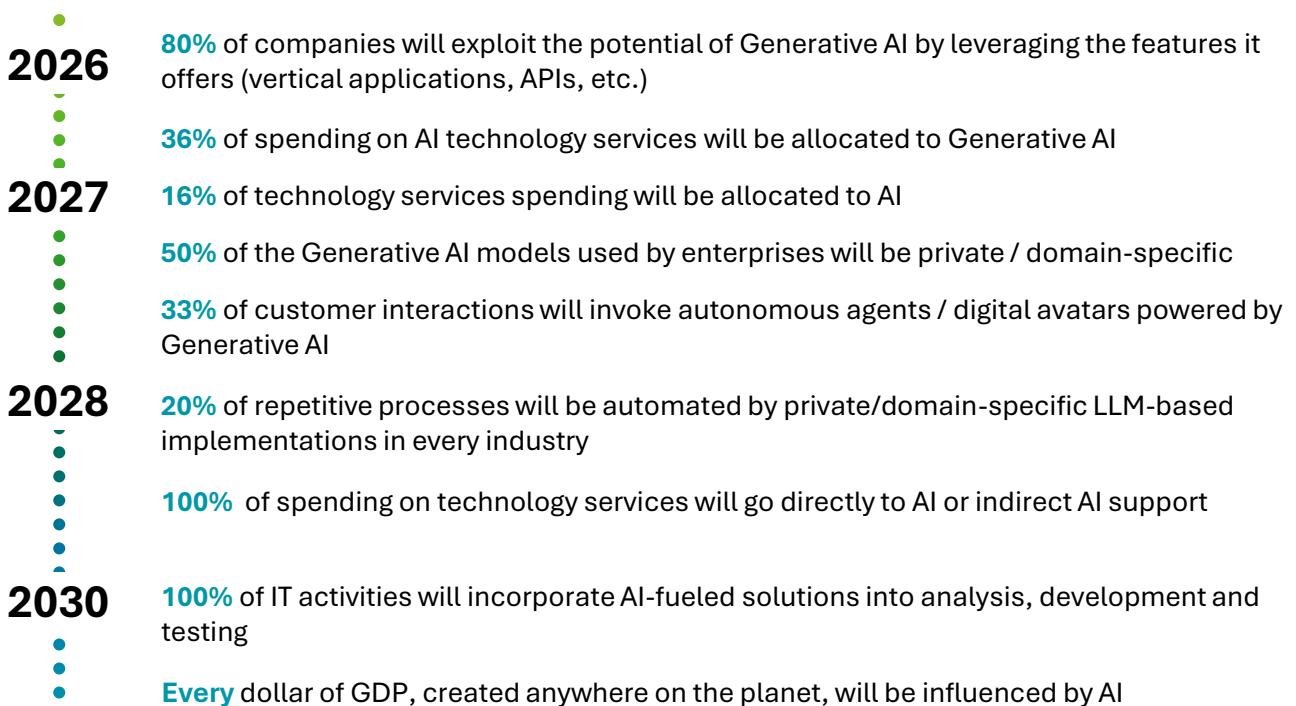
In an increasingly complex global economic environment, macroeconomic conditions are putting **significant pressure** on **corporate revenue** growth. At the same time, geopolitical issues, with high volatility in raw material costs and increasing price competitiveness, are significantly impacting **operating margins**. These factors are redefining the **strategic priorities** of companies, which are now focused on driving growth and maximizing profitability. To enhance operational efficiency and to sustain a **competitive advantage** within this ever-changing economic environment, the priorities identified to date are:

- **Expanding the offer** into new markets and channels
- **Creating** new value-added **products and services**
- **Efficiency** of production processes
- **Increased attractiveness** (quality of service and market reputation)



... to the main developments in AI

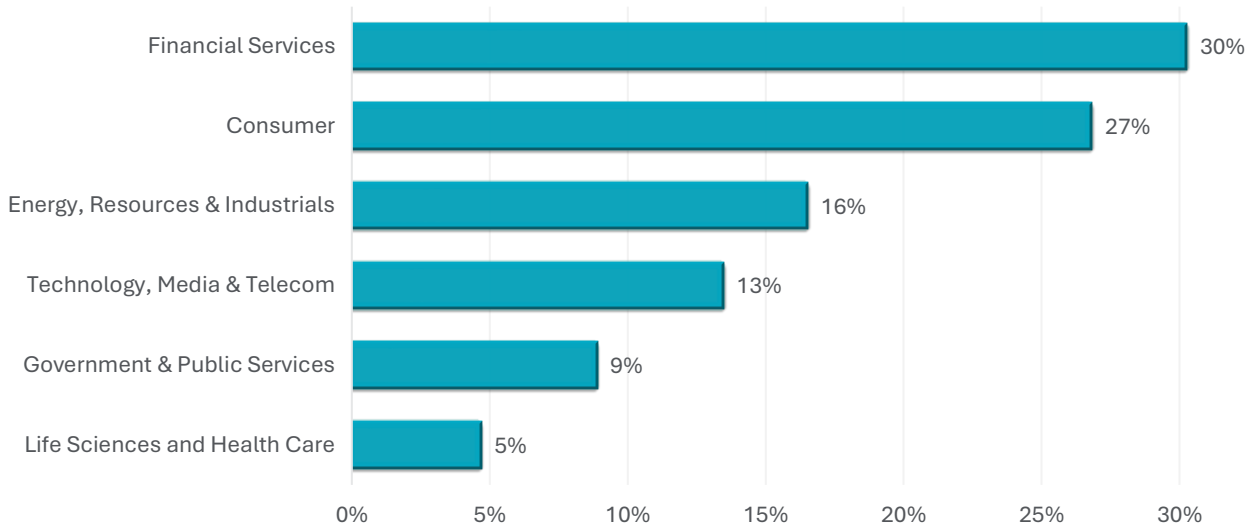
In this context, AI has a transformative effect, which allows companies to **adapt** to current challenges, offering new **opportunities** for growth and innovation. The evolution of AI is shaping the future of the market, providing advanced solutions to optimize processes, improve operational efficiency and proactively respond to consumer needs.



Characteristics and structure of the Survey

The Survey, conducted in 2024, collected the opinions of **medium and large companies** on the importance of digital transformation, showing up the investments and strategies adopted to integrate AI solutions and highlighting the introduction of new solutions offered by Generative AI.

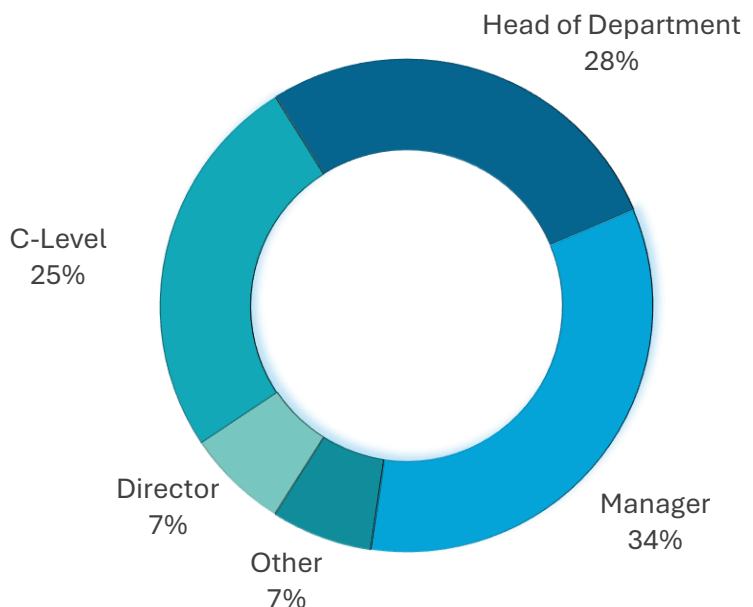
In which industry does your company primarily operate?



21% of the participants belong to the **Banking & Capital Markets** sector (within the Financial Services industry), **11%** operate in the **Retail, Wholesale & Distribution** sector (within the Consumer industry).

Some information that characterizes the sample interviewed: about **28%** work in companies with more than 10,000 employees and 59% in companies with more than 1,000 employees; **31%** belong to the **Information Technology** area and **26%** work in the **Data Analysis and Digital field**.

More than half of the survey participants hold **high-level roles**, such as those of 'C-level' or 'Head of', thus assuming decision-making and strategic responsibilities crucial for the guidance and future vision of the company and the market



Highlights of the AIDO Survey evaluation model

The Survey analyzed the position of the respondents with reference to the **5 evaluation criteria** provided by the AIDO global model defined by Deloitte:



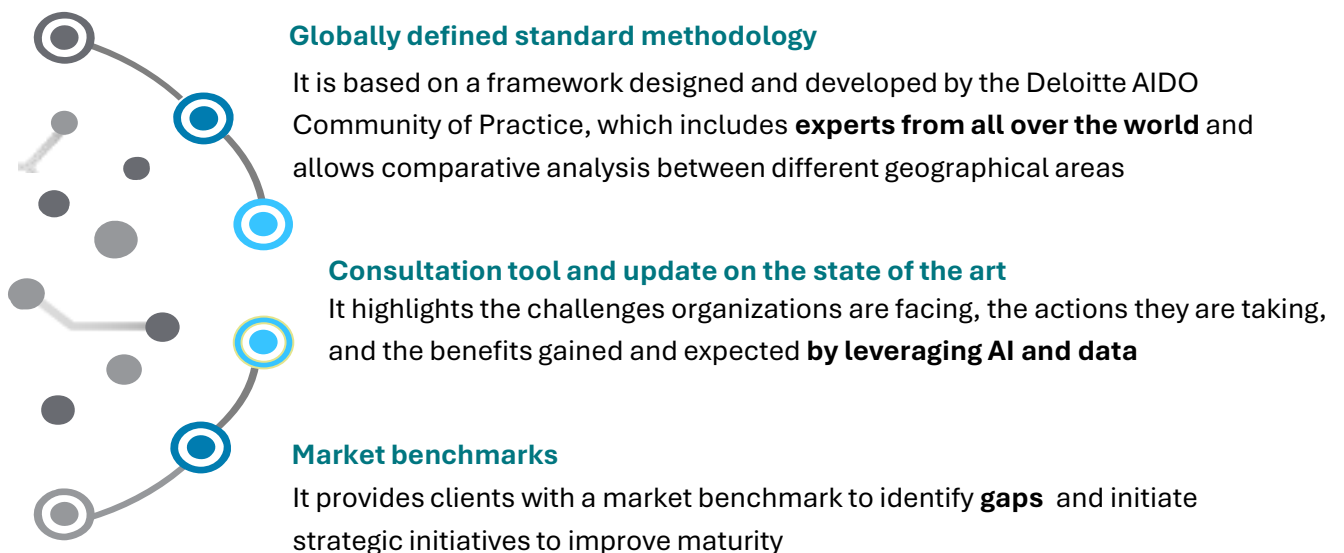
Organizations **continue to invest** in the AI and data landscape as a foundational element, but **face significant challenges** in defining and adopting efficient **operating models**. The lack of specialized skills, essential to support innovation, remains a significant obstacle. This situation underscores the need for more targeted strategies and investments in training to bridge the gap between technological potential and actual results.

43% of planned **IT investments** are allocated to Advanced Analytics, Machine Learning and Generative AI solutions

The largest skills gap is in AI-related roles (49%), which is why **64%** of companies have identified **training as a priority** action

53% recognise the lack of AI expertise as a significant obstacle to fully exploiting the potential of AI

Key aspects of the AIDO Survey evaluation model



The maturity level of organizations

Why become an AIDO?

One of the main benefits is the AI-enhanced efficiency of decision-making.

This comes from the **integrated combination** of strategic, functional and business aspects with technology.

AIDOs do not delegate the management of data and analysis to a single team, but adopt a **holistic approach**, which considers strategy, people, processes, data and technology from an end-to-end perspective. Becoming an AIDO therefore means achieving **rapid decision-making** and proactivity, supported by a deep awareness and knowledge of data.

Distinctive aspects of AIDO



Generating Insights is part of the mindset



Innovations and challenges are part of everyday life



Evolving processes with AI



Proactive governance and robust decision-making

Through widespread use of AI, organizations have the ability to anticipate market trends and dominate the competitive context in which they operate

Competitiveness

How does a certain investment make the company more competitive and how does it differentiate it in the market?

Innovation and Growth

How will the investments foster opportunities for innovation and growth?

Operating Model

What investments are needed in order to bridge the gap with the new skills required? Is the operating model in line with this purpose?

Market Conditions

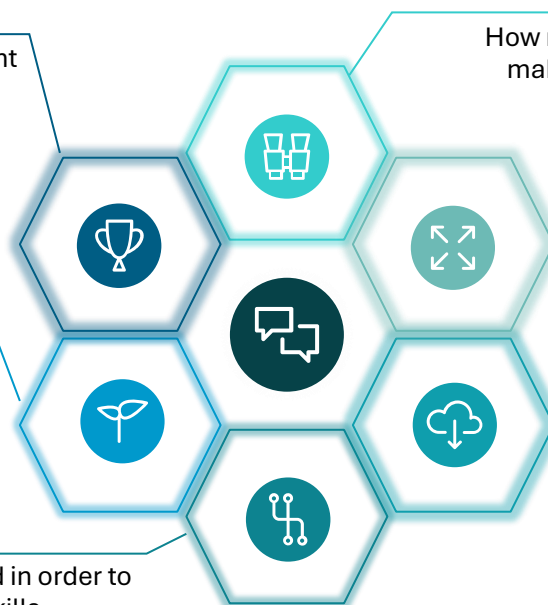
How much would a given investment make the company better suited to respond to changing market conditions?

Scalability

How adequate is the company structure to ensure scalable processes?

Data and Technology

Is reliable data available for analysis, or does it need to be created? Can the technology currently in use enable the use cases that would generate value?

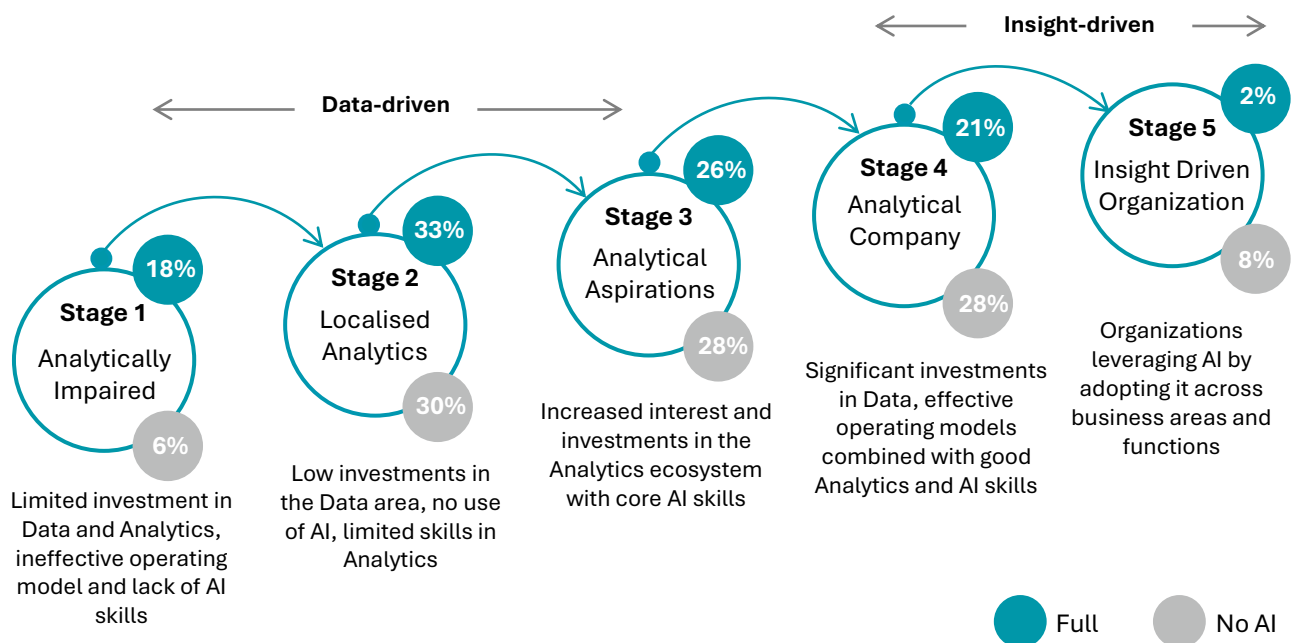


Deloitte's Maturity Model

To assess the level of maturity of companies in the field of AI, Deloitte adopts a global model, which is constantly evolving and updated, based on a wide range of experiences and market initiatives.

The maturity level of companies based on survey results

The following graph illustrates the distribution of companies in the various stages of the 2024 Survey. The analysis is divided into **two perspectives**: one "Full", which considers the answers to all questions, and the other "No AI", which excludes the "scores" relating to questions focused solely on AI solutions.



The comparison between the two perspectives highlights a **significant gap related to the "weight" of AI**. In stage 1, where the necessary skills are absent or scarce, if AI is taken into account, the number of organizations that fall into this category is **double** compared to those that fall into it considering a traditional approach to Analytics. The difference is accentuated in the **last two levels** of maturity, and in particular in the last one, where the ratio is 1 to 4 among organizations that have undertaken a path of engineering and integrating AI into business processes

The trend of organizations investing in AI is growing.

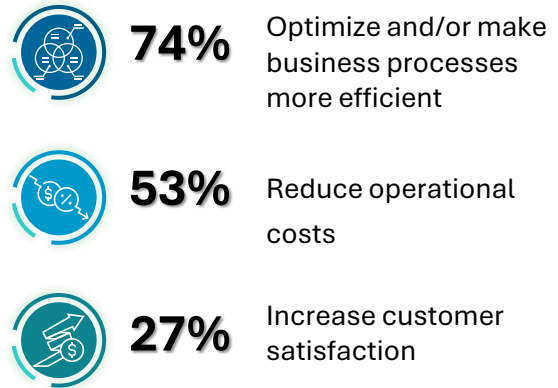
This is demonstrated by the value of 26% of companies residing in the third stage: companies that have started a consolidation of skills in the AI field. This approach encourages **prototype experimentation** with the aim of understanding which internal processes AI can be grafted **into for value creation** and to evaluate related investments.



Defining successful strategies

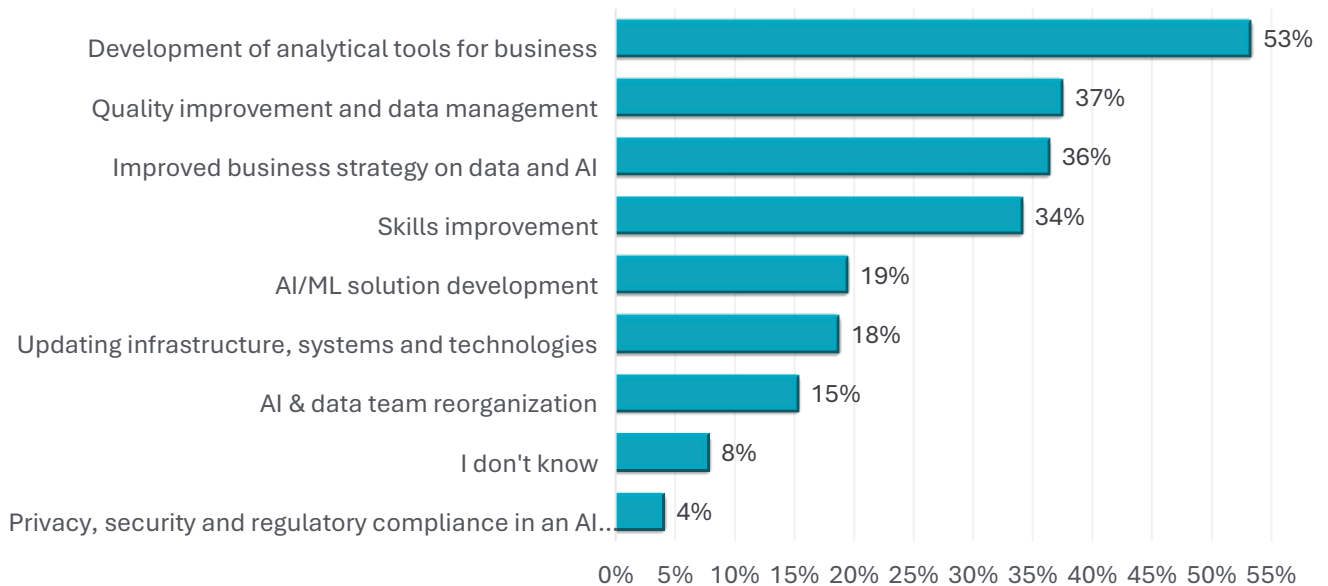
AI is now an integral part of business strategies, a **key driver** for achieving targets. By integrating AI into processes and operating models, companies gain a tangible competitive advantage through a transformation journey.

Fostering a culture of **continuous improvement** and adaptation to change allows you to harness the full potential of AI, strengthening competitiveness and ensuring long-term success.



74% of the companies interviewed are interested in one or more **investments in AI**. In particular, the four sectors most interested in this type of investment are Financial Services, Consumer, Energy, Resources & Industrials and Technology, Media & Telecom

What are the main areas in which you plan to invest in the coming year in the field of AI and Data?



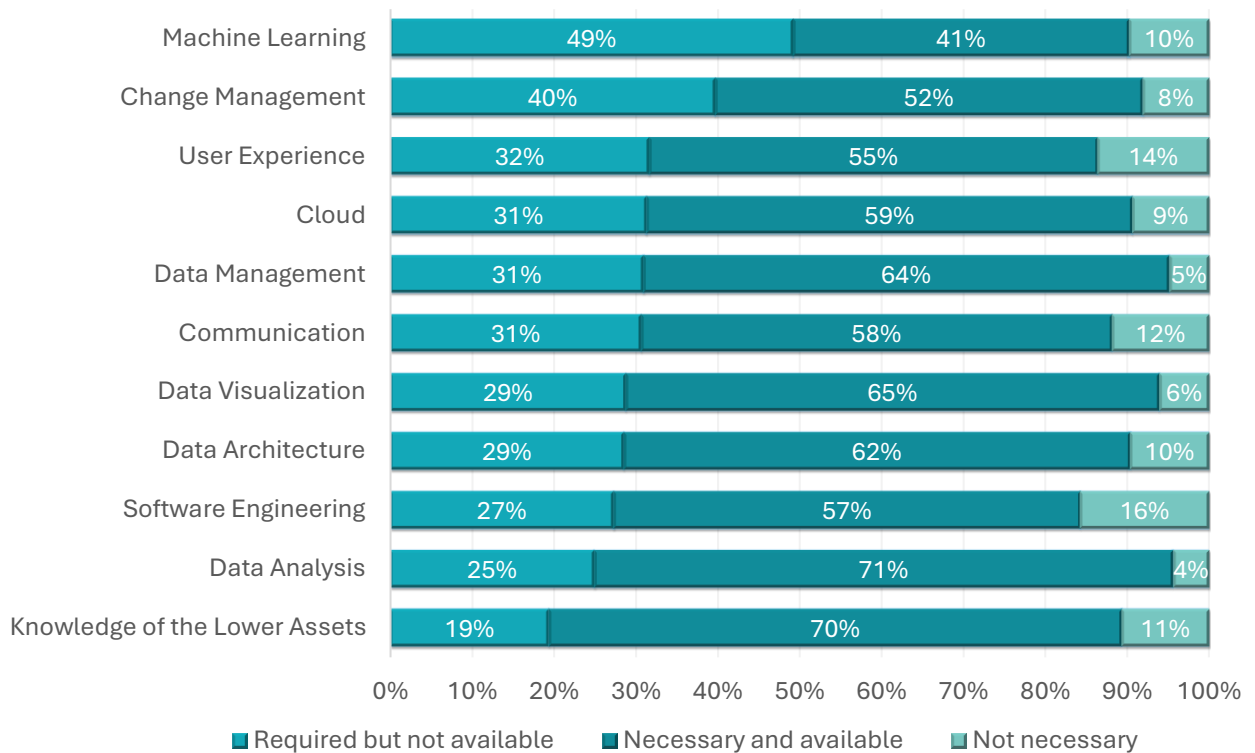
19% of participants plan to invest in AI and ML solutions next year. **34%** aim to improve internal **skills**, aligned with the company's strategy of evolution in the field of AI; finally, **18%** plan to invest in the infrastructures



Evolution of corporate culture

Having specialized skills to effectively manage and analyze data and to adopt AI is now a **key differentiator**. We asked respondents if their organizations have resources with adequate expertise on topics such as Data Management, Machine Learning and Data Architectures.

Does your organization have the necessary skills to address AI and Data issues?



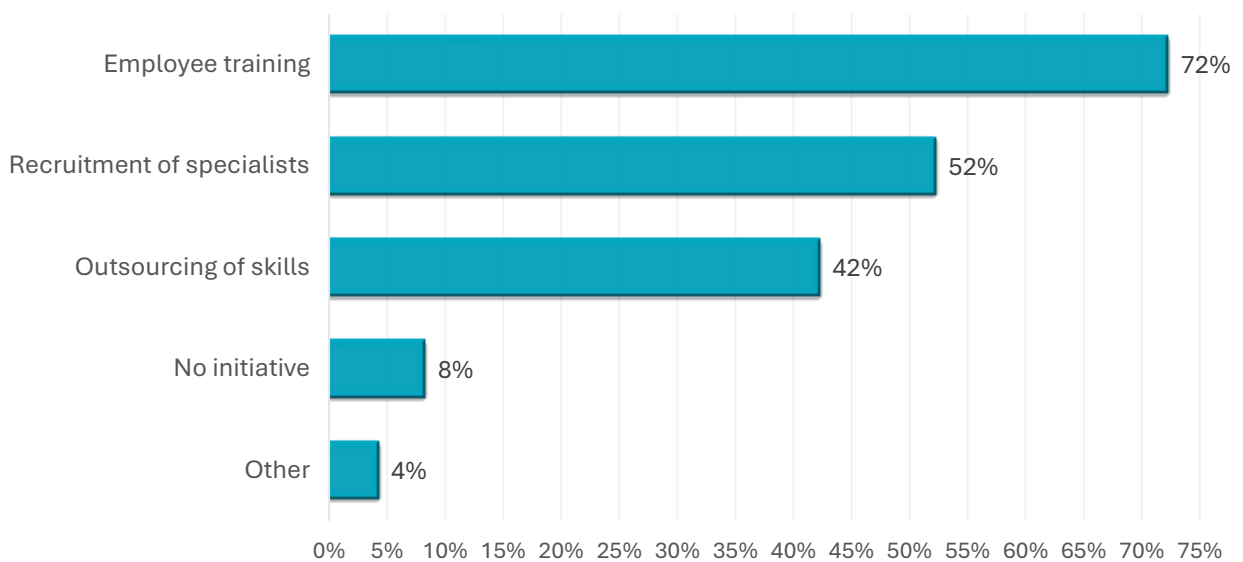
The results show that companies have resources knowledgeable about their informational assets and skilled in Data Analysis. On the contrary, some necessary skills are often unavailable, such as expertise in **Machine Learning** (49%), **Change Management** (40%), **User Experience** (32%), **Cloud** (31%), **Data Management** (31%) and **Communication** (31%).

A significant proportion of organizations believe that the level of AI skills is not sufficient, but they declare a driving force towards training and updating their employees aimed at filling these gaps. As a result, multiple **growth areas** are identified, **beginning with Machine Learning** and extending across the entire **AI ecosystem**.

How companies are moving to acquire the necessary skills

The skills required by the market are constantly **evolving** due to the strong dynamism of external contexts. For this reason, we see several **initiatives taken** by organizations to accelerate the acquisition of appropriate skills. Among the actions aimed at mitigating the skills shortage, companies mainly invest in the **training** and the **professional updating** of their resources (**64%**). The second most selected option falls on the hiring of specialized figures (**41%**) and a significant percentage, to address contingent needs, intends to outsource activities (**36%**).

What are the actions taken in order to guarantee skills in the AI field?



Figures involved in the world of AI, Data & Analytics

The results of the Survey show that the percentage of resources working using and leveraging data and Analytics as their main activity is **low**, despite the fact that the demand for AI-related skills has grown exponentially in all industrial sectors.

79% of companies surveyed say they have less than **10%** of their workforce using Analytics to support their operations, while only **6%** of respondents say the percentage rises to **50%**

While there is an intention to **invest** in advanced solutions in the field of AI, Data & Analytics, there is still limited involvement of people in these areas.

However, organizations have recognized the importance of hiring **specialized figures** to increase their internal skills.

To meet market demand, companies research and promote, in addition to technical skills and specific notions in the field of AI, Data & Analytics, also soft skills based on analytical acumen.



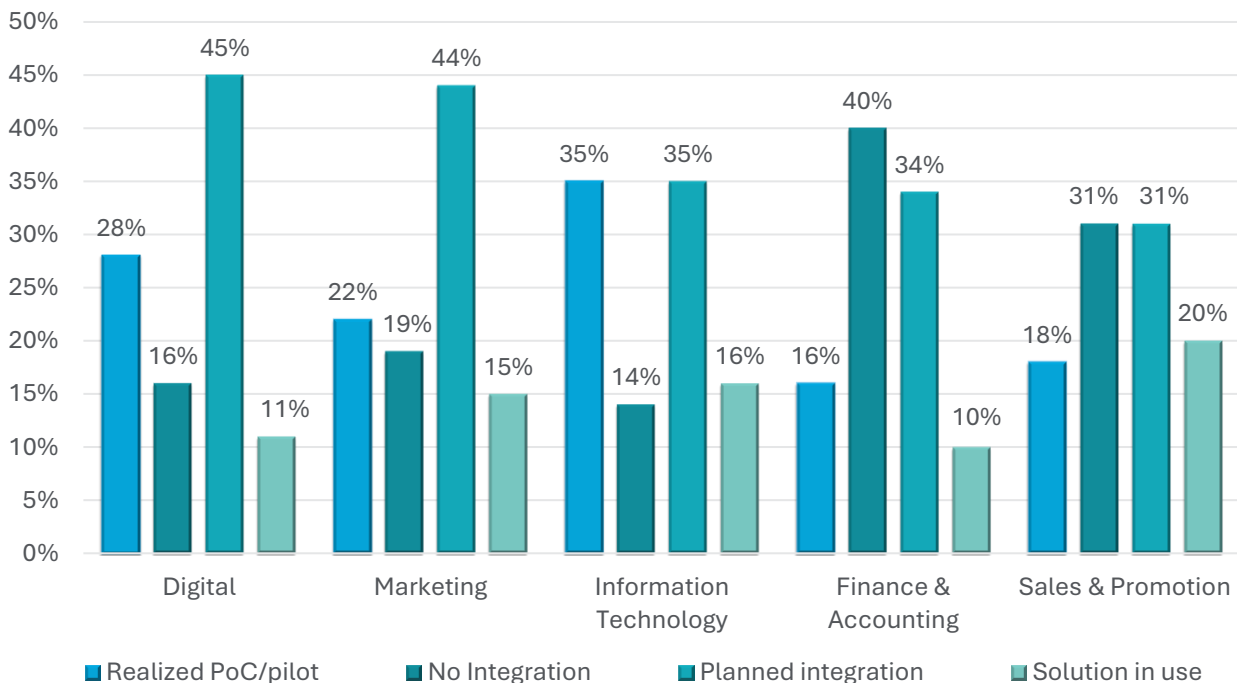
Review of business processes for value generation

AI can make a crucial contribution to **simplifying processes**, analyzing them through the data generated, in order to:

- help identify bottlenecks before they generate congestion;
- provide recommendations for process efficiency by identifying redundant or superfluous paths;
- accelerate the completion of processes by automating repetitive steps or speeding up choices at decision-making hubs.

We asked participants in which business functions they use or plan to use AI. **Sales and Promotion, Information Technology** and **Marketing** departments already show an **advanced level of commitment** in the use of AI; **Digital, Research and Development** and **Customer Service processes** have embarked on this path; in **TAX, Legal & Audit, Procurement, HR** and **Supply Chain** functions, low responsiveness in adopting AI-related solutions was recorded.

Which business departments have defined a strategy for AI integration?



It is clear that companies are willing to integrate AI into their processes and to be guided by insights. **Less than 14%** of respondents said they **do not use AI** and are **not willing to invest** in using it in the near future

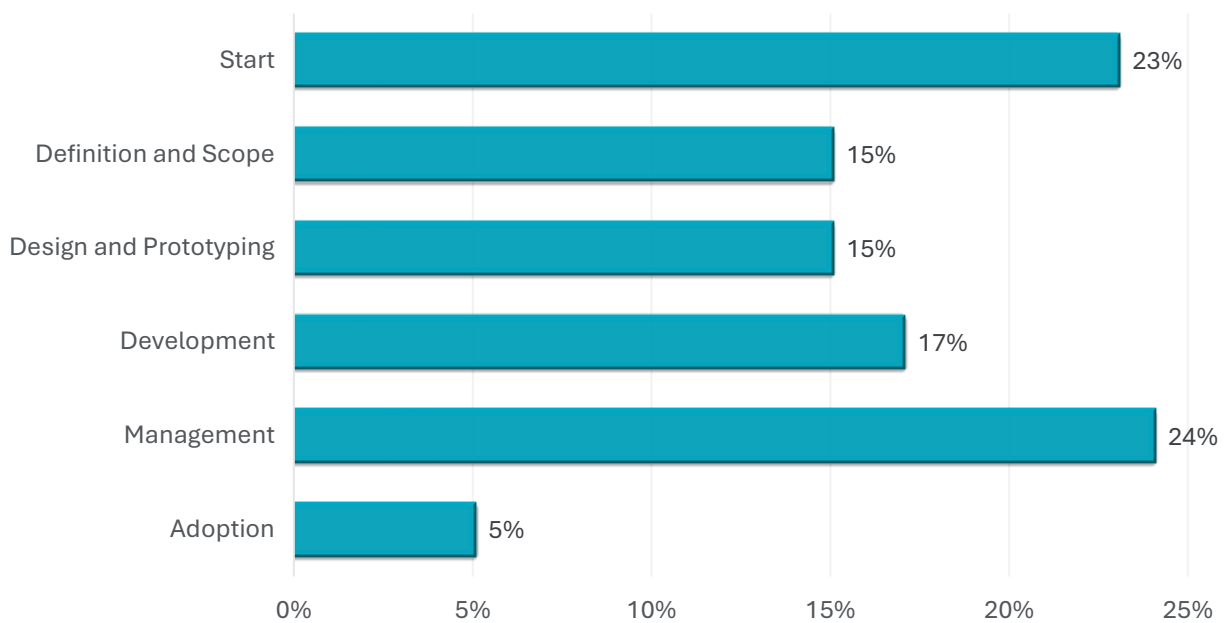
81% of companies operating in the **Marketing area** are **using or approaching AI solutions**. In the **Digital** and in the **Information Technology** sectors the percentages of non-use of AI are only **16%** and **14%**.

Barriers to AI adoption

The analysis of the responses shows that organizations continue to face **significant barriers to AI adoption**. In this context, the Survey aimed to investigate the critical areas that hinder the transformation process towards an **"AI driven"** company.

We asked our respondents which were the most critical project phases in AI-based initiatives.

At what stages of the AI and Data project lifecycle does your organization encounter the main obstacles?



The **startup phase** is a crucial moment for companies, which, from an improvement perspective, recognize the **need to find specific skills**. Companies identify areas for improvement in **managing** and **adopting** AI-related solutions, with a focus on **change management** and **measuring and monitoring return on investment**, key elements for long-term success

Key and relevant elements for an AIDO

Companies that aspire to become AIDO must be able to adopt a well-defined strategy, with a **continuous commitment to innovation** and **learning**.

Ethics

The first step of an ethically responsible AI program is the creation of policies and roles to measure the ethical dimension of AI

Risks

All AI systems must meet standardized parameters of resilience, security, accuracy, and reliability to ensure risk minimization

Regulation

With the vote on March 13, 2024, the European Union confirms itself as a global leader, introducing regulation for the first time to manage the transformative AI revolution



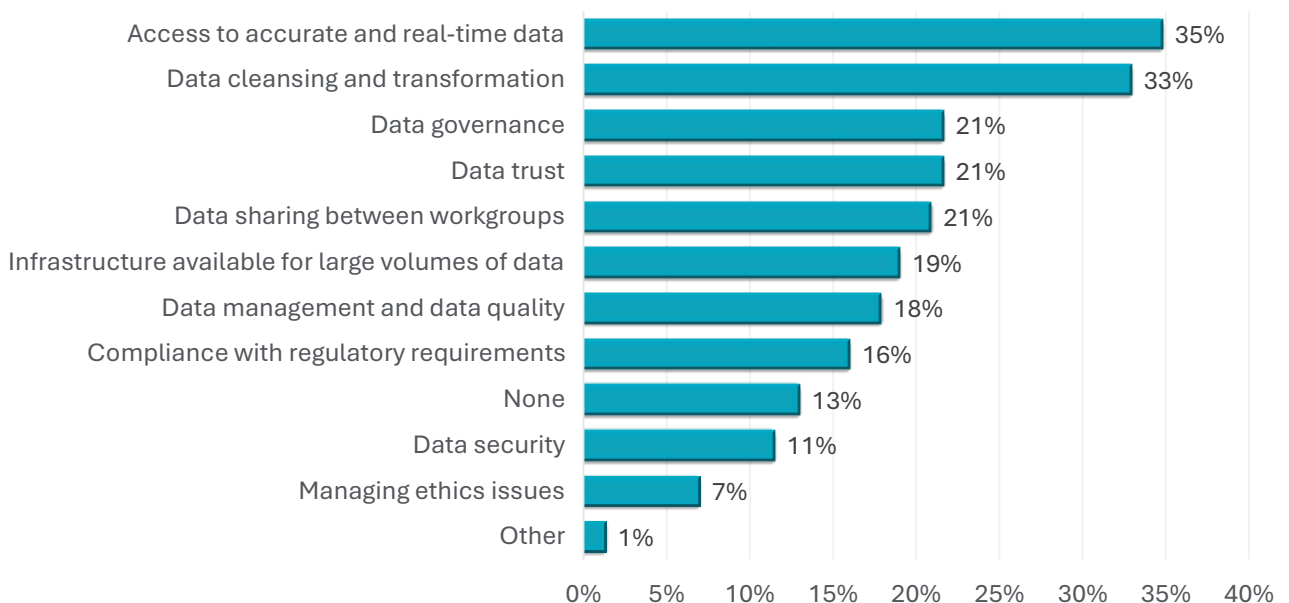
AI for sustainable use of data

The integration of AI solutions promotes a more sustainable data usage by optimizing data management and supporting regulatory compliance. The Survey reveals the key areas in which organizations focus efforts to address the challenges encountered in the AI adoption journey. Most of the investments are focused on **Advanced Analytics** and **Machine Learning** solutions (**40%**) and on the experimentation of **Generative AI (33%)**, while only 2% is allocated to Computer Vision solutions, limited by stringent privacy regulations and a level of technological readiness that is not yet adequate.

The hype around Generative AI has prompted many organizations to implement or plan different use cases, predominantly focused on **chatbots** and **virtual assistants**. However, compared to the potential offered by this technology, adoption for activities such as creating marketing content or generating software code still remains limited.

A significant number of organizations (**35%**) are encountering **difficulties in accessing accurate, real-time data**. In particular, data cleansing and data transformation are proving to be substantial challenges for more than a third of companies (33%).

Areas in the Data area where you are most challenged:



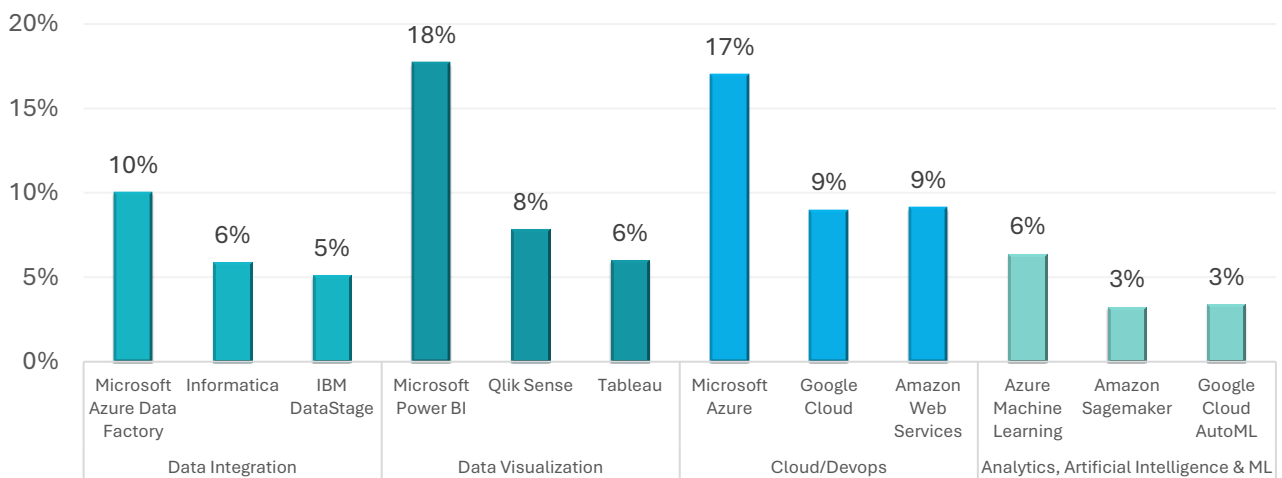
Data governance and data trust are essential for ensuring data reliability and consistency, preventing misuse, and maintaining the quality of business analytics output. However, 21% of respondents report challenges in both areas. This underscores the importance of adopting robust data governance strategies and technological solutions that facilitate the management, protection, and integrity of data, in order to enhance trust and the quality of business analytics.



Technological trends, increasingly business drivers

The results of the Survey show that solutions based on Data Visualization and Data Integration tools are still the most widespread, thanks to their accessibility for everyday use. However, it is essential to consider the importance of a **supporting infrastructure**, increasingly based on the Cloud, with specific solutions that guarantee reliability, scalability and secure access to data, accompanied by adequate governance. This approach enables the consolidation and sharing of information value within business areas.

Top 3 technology tools by type



Some of the AI technology trends that are impacting business:

<p>AI Growth Catalyst</p>	<p>Explainable AI: Tools and techniques that make AI decisions more transparent and understandable, improving user trust</p> <p>Business Process Automation: Using AI to automate complex and repetitive processes, improving efficiency and reducing operational costs</p>
<p>Green Technologies and Sustainability</p>	<p>Circular Economy: Promoting practices that reduce, reuse, and recycle materials to support a sustainable economic model</p> <p>Environmental Impact Prediction: AI models to predict the impacts of human activities on the environment and plan mitigation interventions</p>
<p>Augmented & Virtual Reality</p>	<p>Immersive Experiences: Create virtual environments for training, design, and remote collaboration to improve user interaction</p> <p>Marketing and Sales: Using augmented reality to enhance online shopping experiences, allowing customers to view products in their real-world environment</p>

Becoming AI Driven with the support of Deloitte

Deloitte supports clients at every stage of the process of assessing, developing, and adopting AI solutions. Thanks to its global network, it offers local excellence specialized in the provision of strategic and operational services in the field of AI, in the analysis of Insights and in the modernization of Big Data platforms.

To support companies in the integration of AI solutions, we use a series of **tools and accelerators** that involve all stakeholders and analyze the competitive context, strategic priorities and the degree of digitization of the company. Once these elements have been defined, we develop an **evolution program in the AI field** that includes change management and compliance with ethical and regulatory aspects, thus facilitating the redefinition of operational processes and ensuring **virtuous** and **sustainable** integration. In addition, Deloitte offers domain, functional and application expertise to **support the transformation** of companies towards AI-driven realities

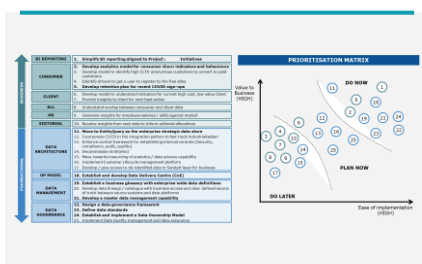
We have a proven track record in analyzing, designing, and executing programs in both pure tech, business or cross-industry contexts. We provide methodologies, processes and application and technological solutions using global or local assets and accelerators.

Deloitte accelerators to improve the AI adoption process



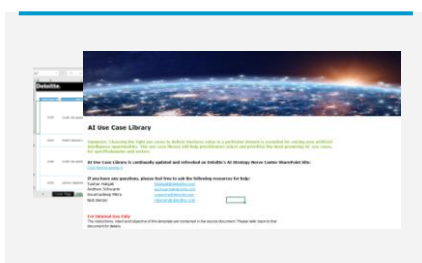
DELOITTE AI INSTITUTE

It supports companies in the transformation programs, use and adoption of AI technologies, providing guidance to companies with the "Human in the loop" paradigm to keep humans at the center of a tech-driven future



AI/ML PRIORITIZATION FRAMEWORK

A detailed framework of AI solutions related to processes and business scenarios classified by priority, to facilitate the evaluation of the value linked to individual use cases



EXTENSIVE AI/ML LIBRARY

A robust library of AI use case value propositions (1000+) to accelerate the ideation and identification of opportunities to adopt valuable solutions for customers

AIDO Scaling Lab

AIDO Lab sessions prepare organizations for **cultural change**, promoting insight-driven decision-making and helping to identify key areas to define an evolutionary roadmap that harnesses the potential of AI. During the Lab, we **co-design with our clients** the phases and activities to develop and consolidate the analytical skills necessary to address the business value proposition.



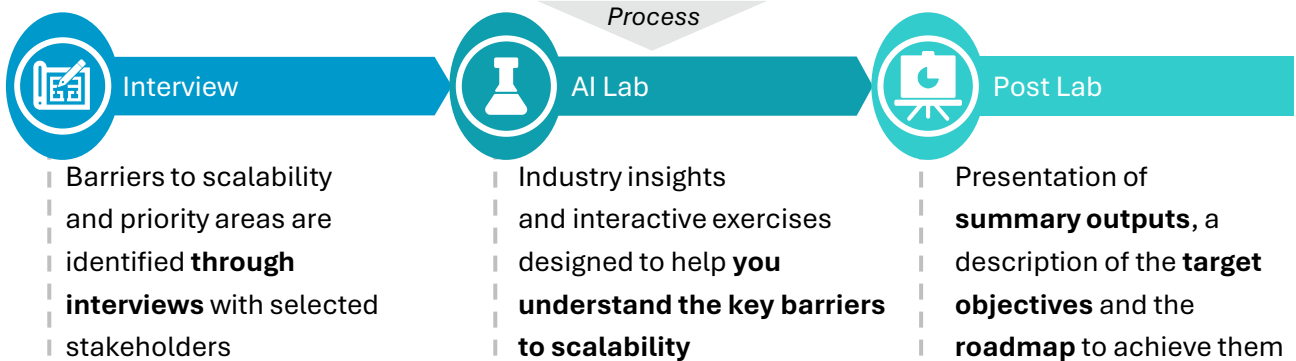
What is the Lab

Immersive, collaborative and interactive session that explores "the art of the possible" and stimulates the transformative path



What are the results for companies?

Overcoming barriers by defining a scalable process supported by an AI evolutionary roadmap across Analytics and data



What to expect from a Lab with Deloitte?

The Lab offers a momentum of stimulation for creativity and to **overcome organizational barriers** to change, as well as defining future aspirations. To ensure that an organization makes the most of the presence of key decision-makers in a shared environment, we support the selection of crucial figures who will lead the cultural change necessary for high value-added transformation processes.

The Lab has been developed in collaboration with Deloitte's AI Institute. Deloitte's SME AIDO methodology addresses both **technical** and **business foundational aspects**, which are essential for the enhancement of the AI solutions adopted

Benefits and impacts of the Lab

The Labs have provided our clients with the opportunity to develop a shared vision and establish a common foundation around data, analytics, and AI. Thanks to the Labs, we offer an **optimized and efficient process** for setting priorities, continuously measuring their value and integrating them into the transformative plan.

This approach not only facilitates the realisation of strategic ambitions, but also increases their economic value by ensuring consistent and results-oriented management.



"Generative AI should be available and accessible to everyone and businesses like ours must ensure that the adoption of AI promotes social equality rather than exacerbating existing disparities"

Richard Houston, CEO of Deloitte UK and Deloitte NSE

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