

C-suite perspectives on Generative AI (Australia)

YouGov®

Prepared for:

salesforce

Living Consumer Intelligence | business.yougov.com

Methodology

- This study was conducted online between 16th-23rd July 2024.
- ▶ The sample comprised 288 Australians 18 years and older who are C-suites and above of large businesses (250+ employees). In this report, this audience will be referred to simply as 'C-suites' for brevity.

Management Role	N
Owner	18
Board of Directors	13
C-suites	257

- The sample categorised CIOs, CTOs and similar roles as technical leaders and other C-suites/CEOs/owners/directors as non-technical leaders.

Type of leaders	N
Technical	82
Non-technical	206

- YouGov designed the questionnaire in consultation with Salesforce.

▶ Key Findings

Key Findings

Importance of Generative AI integration (Q1)

- When considered against other business priorities, almost all C-suites (99%) believe Generative AI integration (private and/or public AI) is important to the success of their business over the next three years, including four in five (81%) who say Generative AI integration is *critical* – *their top priority* (38%), or *quite important* – *in their top three priorities* (42%).
- One in seven (14%) believe Generative AI integration is moderately important - one of many notable initiatives contributing to the success of their business over the next three years, while just 5% believe it is only slightly important - on their agenda but deprioritised, and just 1% say that it is not at all important and that they are not considering Generative AI integration.
- C-suites working in businesses with 1,000 or more employees are more likely than their counterparts in smaller businesses to believe Generative AI integration is *critical* to the success of their business over the next three years (50% compared to 250 to 499 employees: 24% and 500 to 999 employees: 35%).
- While C-suites working in smaller businesses are more likely than larger businesses to believe it is *quite important* - in their top three priorities (250 to 499 employees: 60% compared to 500 to 999 employees: 41% and 1,000+ employees: 35%).
- Technical leaders are more likely than non-technical leaders to believe Generative AI integration is *critical* to the success of their business over the next three years (51% compared to 33%).

Key Findings

Factors driving the importance / priority of integrating Generative AI for business success in the next three years (Q2)

Among those who believe Generative AI integration is important to their business success over the next three years (n=284)...

- Research reveals that the most important factors driving importance or priority of integrating Generative AI for business success in the next three years are to boost productivity and efficiency (43%), to bring innovative customer and/or employee experiences to market (42%) and to remain competitive (41%).
- These are followed by, to be seen as being on the cutting edge of technology adoption (40%), customer expectations for faster/ more personalised experiences (39%), employee demand to introduce Generative AI (38%), and to become a market leader (35%).
- Almost a third of C-suites (29%) say this has been driven by an ask from the board to get going/integrate Generative AI.
- C-suites working in businesses with 500-999 employees are more likely than those working in businesses with 250-499 employees to cite bringing innovative customer and/or employee experiences to market (49% compared to 33%) and becoming a market leader (40% compared to 25%) as the driving factors.
- Among technical leaders, the most common driving factor is employee demand to introduce Generative AI tools (44%). While for non-technical leaders, the most common driving factor is boosting productivity and efficiency (45%).

Key Findings

Description of organisation's current Generative AI approach (Q3)

- Half (50%) of C-suites say their organisation currently has a clear and defined Generative AI strategy, while a further two in five (42%) say they have started working on a Generative AI strategy and plan for their business.
- In addition, 7% of C-suites say they have been discussing Generative AI internally but have not started working on a strategy.
- Only 1% say they have not discussed or investigated Generative AI internally.
- C-suites working in businesses with 1,000+ employees are more likely than their counterparts in smaller businesses to say they currently have a clear and defined Generative AI strategy (65% compared to 250 to 499 employees: 32% and 500 to 999 employees: 44%). While C-suites in smaller businesses are more likely to say they have started working on a Generative AI strategy for their business (250 to 499 employees: 61% and 500 to 999 employees: 48% compared to 1,000+ employees: 25%).
- Over three in five (62%) technical leaders say they currently have a clear and defined Generative AI strategy, which is far more likely than non-technical leaders (45%).

Key Findings

Responsibility for ensuring successful integration of Generative AI for business success in the next three years (Q4)

- Over four in five (86%) C-suite leaders believe C-suite leaders are ultimately responsible for successfully integrating Generative AI in their business over the next three years, including two in five (40%) who say the CEO, one in three (29%) who say the CIO/CTO or other technical leaders, and one in six (17%) who say department heads (e.g. CMO, COO, CFO).
- Less commonly, almost one in ten (8%) say an AI working group/ committee/ team has the ultimate responsibility, followed by external consultants (4%) and individual employees and/or teams (2%).
- C-suites working in businesses with 1,000+ employees are three times as likely as those in businesses with 500 to 999 employees to say an AI working group/ committee/ team has the ultimate responsibility (12% compared to 4%).
- Over half (54%) of technical leaders believe the CIO/CTO or other technical leaders are ultimately responsible for successfully integrating Generative AI in their business over the next three years, which is more than twice as likely as non-technical leaders (19%). Conversely, non-technical leaders are more than twice as likely as technical leaders to say the CEO has the ultimate responsibility (49% compared to 18%).

Key Findings

Confidence in AI integration communication and alignment (Q5)

- Almost all (96%) C-suites are confident that their company's plans to integrate Generative AI have been communicated effectively within their organisation so that every employee is aligned with the vision and is clear on the part they play, including nearly two thirds (64%) who are *very* confident.
- Interestingly, C-suites working in businesses with 1,000+ employees are more likely than their counterparts in smaller businesses to say they are *very* confident (73% compared to 250 to 499 employees: 50%). While C-suites in smaller businesses are more likely to say they are *somewhat* confident (250 to 499 employees: 45% compared to 1,000+ employees: 23%).
- All (100%) technical leaders are confident in this regard, including over two thirds (68%) who say they are *very* confident.
- C-suites who personally use Generative AI all the time/ frequently are more likely than those experimenting/ not using* to say they are *very* confident in this regard (69% compared to 40%).

*Small sample size, C-suites who are experimenting/not currently using Generative AI at work n=47

Key Findings

Functions where Generative AI will have the biggest positive impact (Q6)

- The most common functions that C-suites say they see Generative AI having the biggest positive impact are IT (41%) and operations (35%) in their business today and in the foreseeable future.
- These are followed by customer service (31%), marketing (29%), research and insights (28%), and administration (27%).
- One in four C-suites say they see Generative AI having the biggest positive impact in communications and public relations (26%), human resources (25%), finance (23%), and one in five say in sales (20%).
- C-suites working in businesses with 250-499 employees are twice as likely as those in larger businesses to say Generative AI has/ will have the biggest positive impact in marketing (42% compared to 500-999 employees: 22%) and communications and public relations (37% compared to 1,000+ employees: 19%).
- While half (51%) of C-suites working in businesses with 1,000+ employees say Generative AI has/ will have the biggest positive impact in IT, which is far more likely than those working in businesses with 500-999 employees (33%).
- Technical leaders are more likely than non-technical leaders to say Generative AI has/ will have the biggest positive impact in IT (52% compared to 37%), while non-technical leaders are more likely to say Generative AI has/ will have the biggest positive impact in research and insights (32% compared to 20%).

Key Findings

Personal use of Generative AI at work (Q7)

- Research reveals that usage of Generative AI tools at work among C-suites is high with more than four in five (83%) C-suites saying they personally use Generative AI at work all the time/frequently, including two in five who say they have Generative AI tool/s running on their desktop *all the time* (41%) and another two in five who say they *frequently* use Generative AI at work (43%).
- In addition, one in ten (11%) C-suites say they are experimenting with Generative AI at work.
- Just 5% say they are not currently using Generative AI at work, including 3% who say they plan to use it very soon, and just 2% who say they do not plan to do so.
- C-suites working in businesses with 1,000+ employees are more likely than their counterparts in smaller businesses to say they have a Generative AI tool/s running on their desktop *all the time* (54% compared to 250 to 499 employees: 34% and 500 to 999 employees: 31%).
- Half (49%) of technical leaders say they have Generative AI tool/s running on their desktop *all the time*, compared to 37% of non-technical leaders. Meanwhile, nearly two in five (38%) of technical leaders *frequently* use Generative AI at work, whereas 45% of non-technical leaders report frequent use.
- Similarly, 46% of C-suites working in financial services say they have Generative AI tool/s running on their desktop *all the time*, compared to 32% of those working in the manufacturing industry. Moreover, 38% of C-suites working in financial services *frequently* use Generative AI at work, whereas half (49%) of those working in manufacturing industry report frequent use.

Key Findings

Personal use of Generative AI at work (Q7, Q2-Jul 2023, Q1-Feb 2024)

- The proportion of C-suites who say they are already using Generative AI at work is doubling every six months from 19%* in July 2023 to 40%* in February and 83% in July 2024.
- Close to half (45%*) of C-suites said they were not currently using Generative AI at work but they plan to use it very soon in July 2023. The proportion dropped to only 8%*, and two in five (41%*) were experimenting with Generative AI at work just six months later (February 2024). Up to now, more experimenters are becoming the frequent Generative AI users at work, which increase the users to four in five (83%).
- *For other employees, in July 2023, those who were not currently using Generative AI at work but planned to use it very soon, showed a shift towards to experimenting with Generative AI at work six months later (26% dropped to 16%, and 19% increased to 33%). However, there is no significant difference in users - already using Generative AI at work (13% compared to 17%).*

C-suites+	Jul-23 (n=44)*	Feb-24 (n=35)*	Jul-24
I am already using Generative AI at work	19%	40%	83%
I am experimenting with Generative AI at work	27%	41%	11%
I am not currently using Generative AI at work but I plan to use it very soon	45%	8%	3%
I am not currently using Generative AI at work and do not plan to use it very soon	9%	11%	2%
Other employees	Jul-23 (n=486)	Feb-24 (n=434)	Jul-24
I am already using Generative AI at work	13%	17%	-
I am experimenting with Generative AI at work	19%	33%	-
I am not currently using Generative AI at work but I plan to use it very soon	26%	16%	-
I am not currently using Generative AI at work and do not plan to use it very soon	35%	31%	-

Samples have been filtered by C-suites+ and other employees of large businesses (250+ employees) for Jul 2023 and Feb 2024 studies.

*Small sample size should be interpreted with caution.

In Jul 2024 study, 'I am already using Generative AI at work' is net of 'I have a Generative AI tool/s running on my desktop all the time' and 'I frequently use Generative AI at work'.

Key Findings

Tasks C-suites and their team are currently using Generative AI for (Q8)

- The most common tasks that C-suites and their team currently use Generative AI for are ensuring inclusivity of content and communications (35%), generating text for internal communications (31%) and resolving employee IT issues (31%).
- These are followed by generating image, audio and/or video assets (28%), onboarding and training employees (26%) and researching and aggregating large volumes of material (26%).
- One in four cite generating text for customer communications, keeping data safe, making personal recommendations, and writing code (25% respectively) as the tasks they and their team are currently using Generative AI for.
- Less commonly, C-suites and their team are currently using Generative AI to act as a personal assistant (24%), for summarising large volumes of content (23%), and uncovering insights from data (23%).
- C-suites working in businesses with 1,000+ employees are more likely than those working in businesses with 500-999 employees to say they and their team are currently using Generative AI for generating text for customer communications (33% compared to 19%).
- Moreover, C-suites in businesses with 500-999 employees are more likely than those working in businesses with 250-499 employees to say they and their team are currently using Generative AI for onboarding and training employees (31% compared to 16%).

Among C-suites who personally use Generative AI at work all the time/frequently (n=240)...

- The most common task that C-suites and their team are currently using Generative AI for is ensuring inclusivity of content and communications (37%), followed by resolving employee IT issues (33%) and generating text for internal communications (31%).

Key Findings

Tasks C-suites and their team would consider using Generative for in the next three years (Q9)

- The most common task that C-suites say they and their team would consider using Generative AI for in the next three years is ensuring inclusivity of content and communications (37%).
- Three in ten say they and their team would consider using Generative AI for resolving employee IT issues (31%), generating image, audio and/or video assets (30%), and writing code (30%).
- These are followed by generating text for customer communications (28%) and for internal communications (28%), researching and aggregating large volumes of material (27%), acting as a personal assistant (27%), summarising large volumes of content (26%), making personal recommendations (26%), and keeping data safe (26%).
- Less commonly, C-suites say they and their team would consider using Generative AI for onboarding and training employees (22%) and uncovering insights from data (21%).
- Female C-suites are more likely than their male counterparts to say they and their team would consider using Generative AI for resolving employee IT issues (46% compared to 27%).
- C-suites working in businesses with 1,000+ employees are more likely than those working in businesses with 500-999 employees to say they and their team would consider using Generative AI for resolving employee IT issues (41% compared to 23%).

Key Findings

Tasks C-suites and their team would consider using Generative for in the next three years (Q9) cont.

- C-suites working in businesses with 250-499 employees are more likely than those working in businesses with 500-999 employees to say they and their team would consider using Generative AI for uncovering insights from data (34% compared to 17%).
- C-suites who personally use Generative AI at work all the time/frequently are nearly twice as likely as those just experimenting/not currently using Generative AI at work to say they and their team would consider using Generative AI for writing code (32% compared to 17%) and acting as a personal assistant (30% compared to 15%) in the next three years.

Among C-suites who are experimenting/not currently using Generative AI at work* (n=47)...

- The most common task that they and their team would consider using Generative AI for is generating text for customer communications (40%), followed by summarising large volumes of content (34%).

*Small sample size

Key Findings

Proficiency in using Generative AI to complete work tasks today (Q10)

Yourself

- Nearly all (96%) C-suites say their skills in using Generative AI to complete work tasks today are proficient, however just one in two (51%) say they are *highly* proficient.
- Male C-suites are more likely than their female counterparts to say their skills in using Generative AI to complete work tasks today are *highly* proficient (54% compared to 37%).
- Close to three in five (56%) of those who personally use Generative AI at work all the time/frequently say their skills in using Generative AI to complete work tasks today are *highly* proficient.

Your team

- Similarly, over nine in ten (94%) C-suites say the skills of their team in using Generative AI to complete work tasks today are proficient, however just over half (53%) say they are *highly* proficient.
- C-suites working in businesses with 1,000+ employees are more likely than those working in businesses with 500-999 employees to say the skills of their team in using Generative AI to complete work tasks today are *highly* proficient (62% compared to 48%).

Key Findings

Proficiency in using Generative AI to complete work tasks today (Q10, Q12-Feb 2024)

Yourself

- More C-suites say their skills in using Generative AI to complete work tasks today are *highly* proficient (51% compared to 18%* in Feb 2024).

Team

- Over half (53%) of C-suites say the skills of their team in using Generative AI to complete work tasks today are highly proficient, which is significantly higher than employees themselves who said their skills in using Generative AI to complete work tasks in February 2024 were *highly* proficient (23% in Feb 2024).

	Feb-24		Jul-24	
	[Q12] How proficient would you say your current skills are in using generative AI to complete work tasks?		[Q10] How proficient would you say the skills of you and your team are in using Generative AI to complete work tasks today?	
	C-suites+ (n=27)*	Other employees (n=214)	C-suites+	C-suites+ perception on their team
Highly proficient	18%	23%	51%	53%
Somewhat proficient	66%	52%	45%	41%
Not that proficient	16%	25%	3%	4%
Not proficient at all	0%	1%	0%	1%

Samples have been filtered by C-suites+ and others of large businesses (250+ employees) for Feb 2024 study.

*Very small sample size should be interpreted with caution.

Key Findings

Responsibility for enabling team to use Generative AI effectively at work (Q11)

- More than nine in ten (94%) C-suites say C-suite executives should be responsible for enabling their team to use Generative AI effectively at work, including half (49%) who say the CEO, 47% who say the CIO/CTO or other technical leaders, and two in five (41%) who say department heads (e.g. CMO, COO, CFO).
- One in four (26%) say themselves as a leader of their team should be responsible for enabling their team to use Generative AI effectively at work.
- Moreover, one in five (22%) say an AI working group/ committee/ team should be responsible for enabling their team to use Generative AI effectively at work, one in seven say external consultants (15%) and just 13% believe that individual employees and/or teams should be responsible.
- C-suites working in businesses with 1,000+ employees are almost twice as likely than those working in businesses with 500-999 employees to say an AI working group/ committee/ team (30% compared to 16%) should be responsible for enabling their team to use Generative AI effectively at work.
- Technical leaders are twice as likely than non-technical leaders to say CIO/CTO or other technical leaders (71% compared to 36%) should be responsible for enabling their team to use Generative AI effectively at work. Conversely, non-technical leaders are more likely to say the CEO (55% compared to 32%) and department heads (46% compared to 28%).

Key Findings

Barriers to adoption (or increased adoption) of Generative AI (Q12)

- Despite being widely used, over nine in ten (92%) C-suites believe there are barriers to adoption (or increased adoption) of Generative AI in their business today.
- The most common barriers are a lack of accessibility and inclusivity and generative AI tools consistently producing inaccurate outputs (31% respectively).
- These are followed closely by the use of incomplete customer/company data to train AI models (30%), a lack of skill-building or training opportunities (29%), a lack of data privacy and security (28%), and the cost to implement Generative AI tools (27%).
- Other barriers include the use of out-of-date public data to train AI models (25%), a lack of use cases/ not sure how they would use it in their work (24%), a lack of governance (23%), and a lack of human oversight (22%).
- Those working in businesses with 500-999 employees and 1,000+ employees are more likely than those working in businesses with 250-499 employees to say a barrier to adoption (or increased adoption) of Generative AI in their business today is a lack of skill-building or training opportunities (32% respectively compared to 18%).
- Two in five (40%) technical leaders cite the use of incomplete customer/company data to train AI models as a barrier, which is more likely than non-technical leaders (25%).
- C-suites who personally use Generative AI all the time/ frequently are more likely than those experimenting/ not using* to cite a lack of accessibility and inclusivity (34% compared to 17%) and the use of incomplete customer/company data to train AI models (32% compared to 17%) as barriers to adoption (or increased adoption) of Generative AI in their businesses.

*Small sample size, C-suites who are experimenting/not currently using Generative AI at work n=47

Key Findings

Importance of data factors in building confidence and trust in Generative AI tools (Q13)

Accurate data (i.e. the tool is using accurate data to provide the best output)

- Nearly all (97%) C-suites say accurate data is important in building their confidence and trust in Generative AI tools, including close to three in five (57%) who say it's *extremely* important.

Holistic/complete data (i.e. the tool is using all possible, relevant data to provide the best output)

- Nearly all (97%) C-suites say holistic/complete data is important in building their confidence and trust in Generative AI tools, with two in five (44%) saying it's *extremely* important.

Secure data/control of data/privacy protections/control over location of data (i.e. the tool is not putting confidential data at risk)

- Almost all (98%) C-suites say secure data/control of data/privacy protections/control over location of data is important in building their confidence and trust in Generative AI tools, including three in five (61%) who say it's *extremely* important.

Key Findings

Tasks C-suites would have confidence and trust delegating to AI alone in the next three years (Q14)

- Almost all (98%) C-suites say they have confidence and trust in delegating at least one of the surveyed tasks to AI alone in the next three years.
- C-suites most commonly say the task they would have confidence and trust in delegating to AI alone is resolving employee IT issues (35%).
- Three in ten say they would have confidence and trust in delegating text generation and refinement tasks for communications to AI alone, through ensuring inclusivity of content and communications (31%), generating text for internal communications (31%) and generating text for customer communications (30%).
- More than one in four say they would have confidence and trust in delegating aggregating tasks to AI alone, such as researching and aggregating large volumes of material (28%) and summarising large volumes of content (27%), while they were less confident in using AI alone to uncover insights from data (21%).
- Interestingly, less than one in four say they would have confidence and trust in delegating personal tasks to AI alone, such as acting as a personal assistant (24%) and making personal recommendations (23%).
- In terms of code or visual and audio generation tasks, while over one in four would have confidence and trust in delegating writing of code (27%) to AI alone, they are less confident in using AI alone to generate image, audio and/or video assets (22%).
- Furthermore, one in four (24%) would have confidence and trust in delegating keeping data safe to AI alone and just one in five (21%) share this sentiment for onboarding and training employees.

Key Findings

Tasks C-suites would have confidence and trust delegating to AI alone in the next three years (Q14) cont.

- Those working in businesses with 250-499 employees are twice as likely than those working in businesses with 500-999 employees to say they would have confidence and trust in delegating the task of uncovering insights from data to AI alone (31% compared to 16%).
- Technical leaders are more likely than non-technical leaders to say they would have confidence and trust in delegating the task of ensuring inclusivity of content and communications to AI alone in the next three years (40% compared to 28%).
- *In addition, the top three tasks that C-suite say they have confidence and trust in delegating tasks to AI alone in the next three years, are also the top three most common tasks that C-suites and their team are currently using Generative AI for (Q8).*

Key Findings

Tasks currently used, would consider using, and would have confidence and trust in delegating to AI alone in the next three years (Q8, Q9, Q14)

Currently using Generative AI for (Q8)		Would consider using Generative AI for in the next three years (Q9)		Would have confidence and trust in delegating to AI alone in the next three years (Q14)	
Ensuring inclusivity of content and communications	35%	Ensuring inclusivity of content and communications	37%	Resolving employee IT issues	35%
Resolving employee IT issues	31%	Resolving employee IT issues	31%	Ensuring inclusivity of content and communications	31%
Generating text for internal communications	31%	Generating image, audio and/or video assets	30%	Generating text for internal communications	31%
Generating image, audio and/or video assets	28%	Writing code	30%	Generating text for customer communications	30%
Researching and aggregating large volumes of material	26%	Generating text for internal communications	28%	Researching and aggregating large volumes of material	28%
Onboarding and training employees	26%	Generating text for customer communications	28%	Summarising large volumes of content	27%
Generating text for customer communications	25%	Researching and aggregating large volumes of material	27%	Writing code	27%
Keeping data safe	25%	To act as a personal assistant	27%	Keeping data safe	24%
Writing code	25%	Summarising large volumes of content	26%	To act as a personal assistant	24%
To make personal recommendations	25%	Keeping data safe	26%	To make personal recommendations	23%
To act as a personal assistant	24%	To make personal recommendations	26%	Generating image, audio and/or video assets	22%
Summarising large volumes of content	23%	Onboarding and training employees	22%	Uncovering insights from data	21%
Uncovering insights from data	23%	Uncovering insights from data	21%	Onboarding and training employees	21%

Key Findings

Tasks currently used, would consider using, and would have confidence and trust in delegating to AI alone in the next three years (Q8, Q9, Q14)

- Ensuring inclusivity of content and communications and resolving employee IT issues remain the top two of those surveyed tasks not only for current use, but also have potential to be used and delegated to AI alone in the next three years.
- Writing code shows an increased potential to be widely used in the next three years (currently use: 25% compared to would consider: 30%).
- However, using Generative AI for onboarding and training employees sees a decline in usage in the next three year (currently use: 25% compared to would consider: 22%). In addition, C-suites have less confidence and trust in delegating to AI alone for this task compared to other surveyed tasks.
- Surprisingly, current usage and usage in the next 3 years of Generative AI for uncovering insights from data is lowest of all surveyed tasks as well as being a task that C-suites have less confidence and trust in delegating to AI alone in the next three years. *This is despite 28% of C-suites saying they see Generative AI having the biggest positive impact in research and insights in their business today and in the foreseeable future.*

Thank You

Cath Kretzmann

Belle Wang

Belle.wang@yougov.com

YouGov, 2021, all rights reserved. All materials contained herein are protected by copyright laws. Any storage, reproduction or distribution of such materials, in whole or in part, in any form without the prior written permission of YouGov is prohibited. This information (including any enclosures and attachments) is propriety and confidential and has been prepared for the exclusive use and benefit of the addressee(s) and solely for the purpose for which it is provided. We make no representations, warranties or guarantees, whether express or implied, that the information is accurate, complete or up to date. We exclude all implied conditions, warranties, representations or other terms that may apply and we will not be liable to you for any loss or damage, whether in contract, tort (including negligence), breach of statutory duty, or otherwise, even if foreseeable, arising under or in connection with use of or reliance on the information. We do not exclude or limit in any way our liability to you where it would be unlawful to do so.