C-suite perspectives on Generative AI (India)

Prepared for:

salesforce

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Methodology

- This study was conducted online between 17th-28th July 2024.

- The sample comprised 302 Indian adults aged 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	52
Board of Directors	24
C-suites	226

- 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	75
Non-technical	227

- YouGov designed the questionnaire in consultation with Salesforce.

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Key Findings

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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 (80%) who say Generative AI integration is *critical – their top priority* (44%), or *quite important – in their top three priorities* (36%).

- One in seven (15%) 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 4% 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.

- Over half (52%) of C-suites working in businesses with 5,000 or more employees believe Generative AI integration is *critical* to the success of their business over the next three years.

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 tools are important to their business success over the next three years (n=299)…

- Research reveals that the most important factors driving importance or priority of integrating Generative AI for business success in the next three years are customer expectations for faster, more personalised experiences (56%) and to boost productivity and efficiency (55%).

- These are followed by, employee demand to introduce Generative AI tools (49%), to bring innovative customer and/or employee experiences to market (48%), to be seen as being on the cutting edge of technology adoption (48%), due to an ask from the board to get going/ integrate Generative AI (44%), and to remain competitive (44%).

- Less commonly, C-suites say this has been driven by becoming a market leader (38%).

- Among C-suites working in businesses with 5,000 or more employees, the most common driving factor is employee demand to introduce Generative AI tools (61%).

- Among technical leaders, the most common driving factor is to boost productivity and efficiency (67%), which is far more likely than non-technical leaders (51%). While for non-technical leaders, the most common driving factor is customer expectations for faster, more personalised experiences (53%).

- Seven in ten C-suites who are working in the technology industry say this has been driven by customer expectations for faster, more personalised experiences and to boost productivity and efficiency (69% respectively).

Key Findings

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

- Three in five (60%) of C-suites say their organisation currently has a clear and defined Generative AI strategy, while a further one in three (32%) say they have started working on a Generative AI strategy and plan for their business.

- In addition, 5% 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.

- Non-technical leaders are more likely to say they currently have a clear and defined Generative AI strategy (65% compared to technical leaders 45%). While technical leaders are more likely to say they have started working on a Generative AI strategy and plan for their business (51% compared to non-technical leaders 26%).

Key Findings

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

- Three in four (76%) 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 (42%) who say the CEO, one in five (18%) who say the CIO/CTO or other technical leaders, and one in seven (15%) who say department heads (e.g. CMO, COO, CFO).

- Less commonly, one in eight (12%) say an AI working group/ committee/ team has the ultimate responsibility, followed by individual employees and/or teams and external consultants (6% respectively).

- Over half (52%) 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 seven times as likely as non-technical leaders (7%). Conversely, non-technical leaders are more than ten times as likely as technical leaders to say the CEO has ultimate responsibility (55% compared to 5%).

- C-suites working in financial services are more likely than those working in the technology industry to say the CEO has ultimate responsibility (55% compared to 37%), while those working in the technology industry are more likely than those working in financial services to say the CIO/CTO or other technical leaders have ultimate responsibility (30% compared to 13%).

Key Findings

Confidence in AI integration communication and alignment (Q5)

- Almost all (97%) 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 over four in five (83%) who 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 (92% compared to 61%).

Key Findings

<u>Functions where Generative AI will have the biggest positive impact (Q6)</u>

- The most common functions that C-suites say they see Generative AI having the biggest positive impact is IT (44%).

- These are followed by finance (33%), customer service (31%), research and insights (30%), human resources (29%), operations (27%).

- One in four C-suites say they see Generative AI having the biggest positive impact in communications and public relations (25%) and administration (25%) in their business today and in the foreseeable future.

- While less commonly, less than one in five C-suites say they see Generative AI having the biggest positive impact in marketing (18%) and sales (16%).

- Technical leaders are more likely than non-technical leaders to say they see Generative AI having the biggest positive impact in IT (63% compared to 37%).

- Unsurprisingly, C-suites working in the technology industry are more likely than those working in financial services to say they see Generative AI having the biggest positive impact in IT (65% compared to 32%). While those working in financial services are more likely than those working in the technology industry to say they see Generative AI having the biggest positive impact in finance (50% compared to 21%).

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 seven in ten (73%) C-suites reporting they personally use Generative AI at work all the time/frequently. This includes almost half (45%) who have Generative AI tools running on their desktop *all the time*, and another nearly three in ten (27%) who *frequently* use Generative AI at work.

- In addition, nearly one in five (19%) C-suites say they are experimenting with Generative AI at work.

- Just 8% say they are not currently using Generative AI at work, including 6% 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 the technology industry (42%) are more likely than those working in financial services (25%) to say they *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 (42%).

- This is followed by resolving employee IT issues (38%), to act as a personal assistant (37%), onboarding and training employees (37%), generating text for customer communications (36%), and generating text for internal communications (36%).

- Around a third cite researching and aggregating large volumes of material (34%), summarising large volumes of content (34%), making personal recommendations (33%), generating image, audio and/or video assets (33%), and writing code (32%) 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 for keeping data safe (30%) and uncovering insights from data (27%).

- Technical leaders are more likely than non-technical leaders to say they and their team are currently using Generative AI for summarising large volumes of content (44% compared to 30%).

Among C-suites who personally use Generative AI at work all the time/frequently (n=219)…

- The most common task that C-suites and their team are currently using Generative AI for is ensuring inclusivity of content and communications (46%), followed by resolving employee IT issues (42%) and onboarding and training employees (42%).

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 (47%).

- Around two in five say they and their team would consider using Generative AI for generating text for internal communications (42%), writing code (42%), generating text for customer communications (41%), and generating image, audio and/or video assets (40%).

- These are followed by acting as a personal assistant (39%), resolving employee IT issues (38%), making personal recommendations (37%), researching and aggregating large volumes of material (37%), and summarising large volumes of content (36%).

- Less commonly, C-suites say they and their team would consider using Generative AI for uncovering insights from data (32%), onboarding and training employees (32%) and keeping data safe (31%).

- C-suites working in businesses with 1,000+ employees (46% - especially 5,000 employees: 51%) are more likely than those working in businesses with 250-999 employees (34%) to say they and their team would consider using Generative AI for generating text for internal communications.

- Technical leaders are more likely than non-technical leaders to they and their team would consider using Generative AI for resolving employee IT issues (49% compared to 34%).

Key Findings

<u>Tasks C-suites and their team would consider using Generative AI for in the next three years (Q9)</u> *cont*.

- C-suites who personally use Generative AI at work all the time/frequently are more likely than those just experimenting/not currently use Generative AI at work to say they and their team would consider using Generative AI for ensuring inclusivity of content and communications (52% compared to 36%) and resolving employee IT issues (42% compared to 29%) in the next three years.

Among C-suites who are experimenting/not currently using Generative AI at work (n=80)…

- The most common task that they and their team would consider using Generative AI for is generating text for internal communications (41%), followed by ensuring inclusivity of content and communications (36%), writing code (36%) and researching and aggregating large volumes of material (36%).

Key Findings

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

Yourself

• Nearly all (95%) C-suites say their skills in using Generative AI to complete work tasks today are proficient, with nearly four in five (79%) saying they are *highly* proficient.

• C-suites working in businesses with 250-999 employees are more likely than those working in businesses with 1,000+ employees to say their skills in using Generative AI to complete work tasks today are *highly* proficient (87% compared to 76%).

• More than four in five (85%) 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, nearly all (96%) C-suites say the skills of their team in using Generative AI to complete work tasks today are proficient, however only close to six in ten (58%) say they are *highly* proficient.

• C-suites working in businesses with 500-999 employees are more likely than those working in businesses with 1,000+ employees to say the skills of their team in using Generative AI to complete work tasks today are *highly* proficient (72% compared to 54%).

Key Findings

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

- Four in five (82%) C-suites say C-suite executives should be responsible for enabling their team to use Generative AI effectively at work, including (52%) who say the CEO, two in five (40%) who say department heads (e.g. CMO, COO, CFO), and 36% who say the CIO/CTO or other technical leaders.

- Close to two in five say themselves as a leader of their team (37%) and AI working group/ committee/ team (36%) should be responsible for enabling their team to use Generative AI effectively at work.

- Moreover, around a quarter say that individual employees and/or teams (25%) and external consultants (24%) should be responsible for enabling their team to use Generative AI effectively at work.

- C-suites working in businesses with 1,000+ employees are almost twice as likely than those working in businesses with 250-999 employees to say individual employees and/or teams (30% compared to 14%) should be responsible for enabling their team to use Generative AI effectively at work.

- Technical leaders are more likely than non-technical leaders to say CIO/CTO or other technical leaders (63% compared to 28%) 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 should be responsible for enabling their team to use Generative AI effectively at work (62% compared to 23%).

Key Findings

<u>Barriers to adoption (or increased adoption) of Generative AI (Q12)</u>

- Despite being widely used, over nine in ten (91%) 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 (38%), followed by Generative AI tools consistently producing inaccurate outputs, the cost to implement Generative AI tools, and a lack of skill-building or training opportunities (34% respectively).

- These are followed closely by the use of incomplete customer/company data to train AI models (32%) and a lack of governance (30%).

- Other barriers include a lack of human oversight, a lack of use cases/ not sure how they would use it in their work, a lack of data privacy and security (28% respectively), as well as the use of out-of-date public data to train AI models (27%).

- Those working in businesses with 500-999 employees (49%) are more likely than those working in businesses with 1,000+ employees (27%) to say a barrier to adoption (or increased adoption) of Generative AI in their business today is the use of incomplete customer/company data to train AI models.

- Non-technical leaders are more likely than technical leaders to cite a lack of skill-building or training opportunities (37% compared to 23%) and a lack of governance (34% compared to 19%) as the barriers to adoption (or increased adoption) of Generative AI in their business today.

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 (95%) C-suites say accurate data is important in building their confidence and trust in Generative AI tools, including seven in ten (72%) 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 (95%) C-suites say holistic/complete data is important in building their confidence and trust in Generative AI tools, with close to three in five (58%) say it's *extremely* important.

• Those working in businesses with 500-999 employees (69%) are more likely than those working in businesses with 1,000+ employees (54%) to say it's *extremely* important in this regard.

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

• Nearly all (96%) 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 seven in ten (72%) 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)

- All (100%) 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 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 (47%), generating text for customer communications (37%) and generating text for internal communications (37%).

- Interestingly, two in five say they would have confidence and trust in delegating personal tasks to AI alone, such as making personal recommendations (40%) and acting as a personal assistant (39%).

- In terms of code or visual and audio generation tasks, fewer than two in five would have confidence and trust in delegating writing of code (38%) and generating image, audio and/or video assets (36%) to AI alone.

- Over a third say they would have confidence and trust in delegating aggregating tasks to AI alone, such as uncovering insights from data (35%), researching and aggregating large volumes of material (33%) and summarising large volumes of content (33%).

- Furthermore, more than two in five (42%) would have confidence and trust in delegating resolving employee IT issues to AI alone. 38% would have confidence and trust in delegating keeping data safe to AI alone and just one third (33%) share this sentiment for onboarding and training employees.

- Those working in businesses with 250-999 employees are more likely than those working in businesses with 1000+ employees to say they would have confidence and trust in delegating the task of generating text for customer communications to AI alone (49% compared to 31%).

- Technical leaders are more likely than non-technical leaders to say they would have confidence and trust in delegating the task of summarising large volumes of content to AI alone in the next three years (45% compared to 30%).

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	42%	Ensuring inclusivity of content and communications	47%	Ensuring inclusivity of content and communications	47%
Resolving employee IT issues	38%	Generating text for internal communications	42%	Resolving employee IT issues	42%
To act as a personal assistant	37%	Writing code	42%	To make personal recommendations	40%
Onboarding and training employees	37%	Generating text for customer communications	41%	To act as a personal assistant	39%
Generating text for customer communications	36%	Generating image, audio and/or video assets	40%	Writing code	38%
Generating text for internal communications	36%	To act as a personal assistant	39%	Keeping data safe	38%
Researching and aggregating large volumes of material	34%	Resolve employee IT issues	38%	Generating text for customer communications	37%
Summarising large volumes of content	34%	Researching and aggregating large volumes of material	37%	Generating text for internal communications	37%
To make personal recommendations	33%	To make personal recommendations	37%	Generating image, audio and/or video assets	36%
Generating image, audio and/or video assets	33%	Summarising large volumes of content	36%	Uncovering insights from data	35%
Writing code	32%	Uncovering insights from data	32%	Summarising large volumes of content	33%
Keeping data safe	30%	Onboarding and training employees	32%	Researching and aggregating large volumes of material	33%
Uncovering insights from data	27%	Keeping data safe	31%	Onboarding and training employees	33%

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 remain the top 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: 32% compared to would consider: 42%).

- Surprisingly, current usage of Generative AI for keeping data safe (30%) and uncovering insights from data (27%) are lowest of all surveyed tasks but see an uplift in delegation these to AI alone in the next three year (38% and 35% respectively).

- However, using Generative AI for onboarding and training employees sees a decline in usage in the next three year (currently use: 37% compared to would consider: 32%). In addition, C-suites have less confidence and trust in delegating to AI alone for this task compared to other surveyed tasks (33%).

Thank You

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