

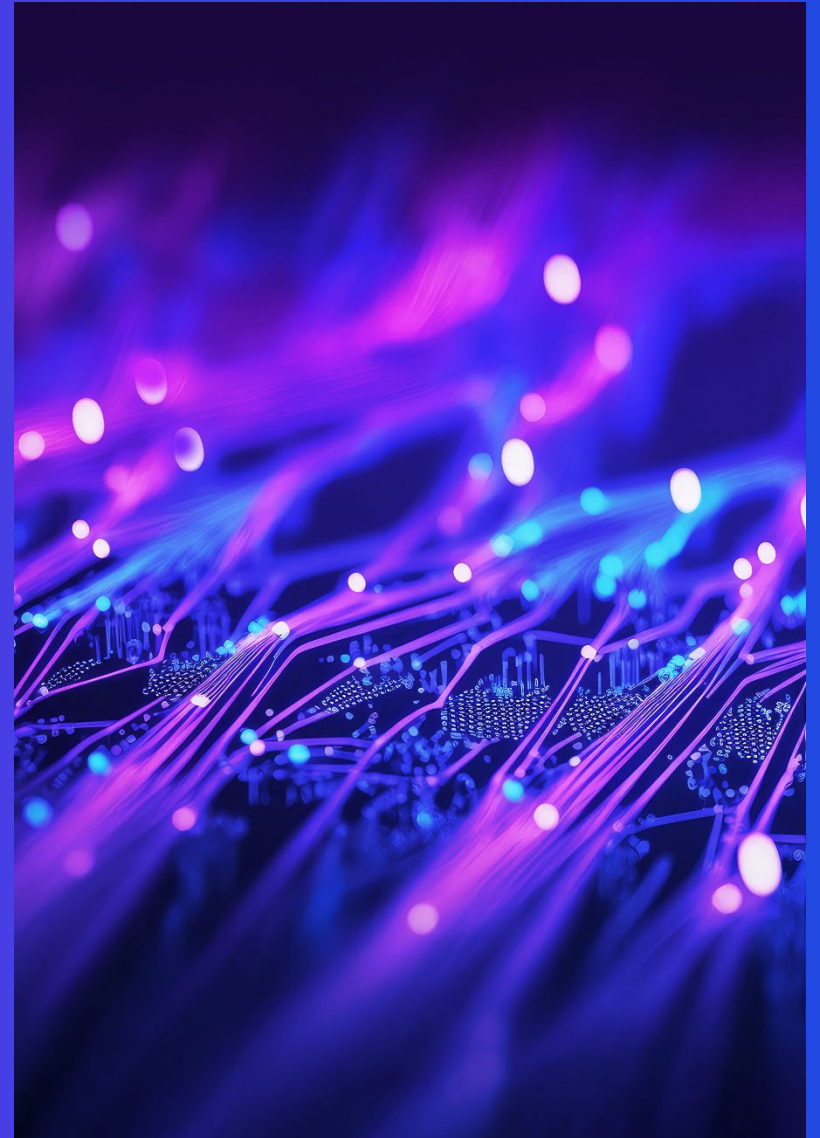


# AI Q4 Pulse Survey: Key Findings

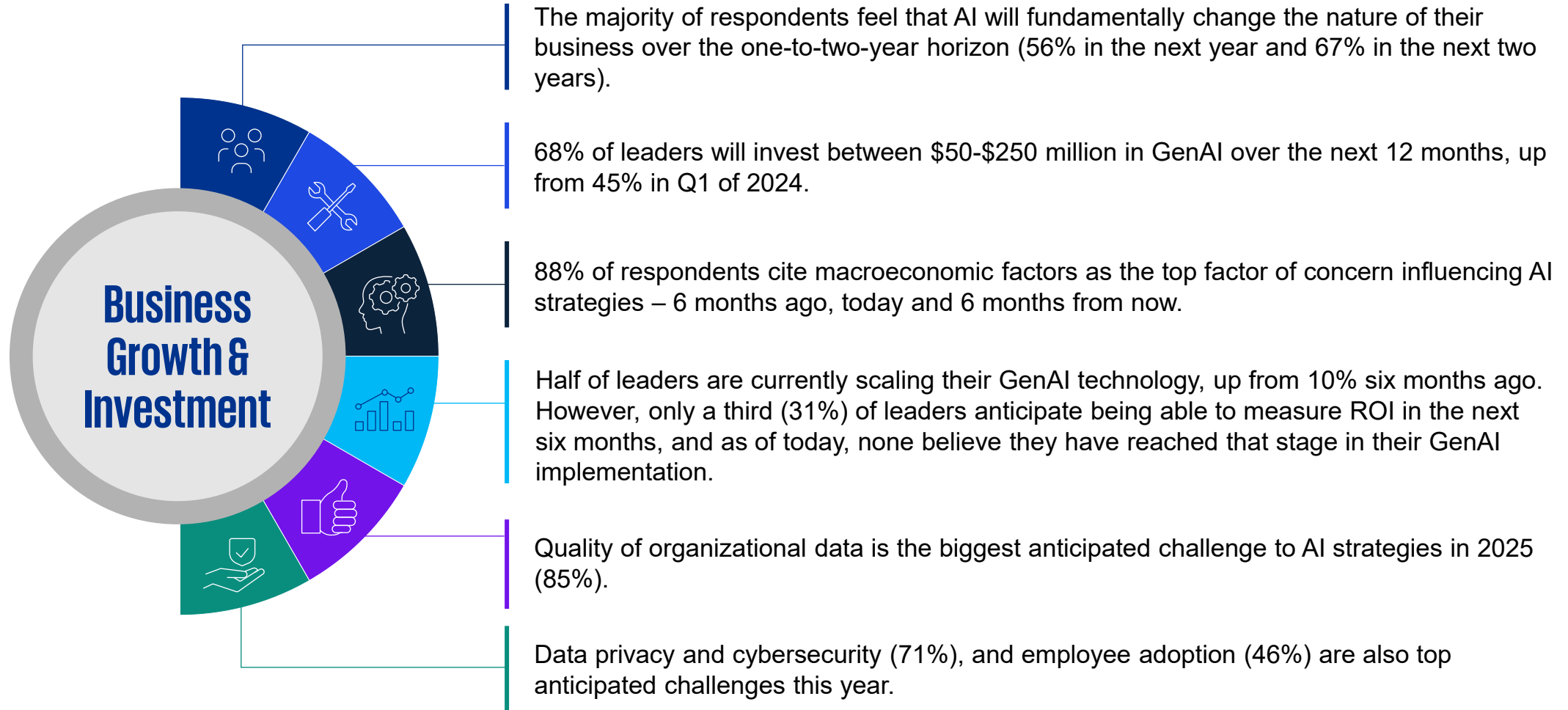
AI & Digital Innovation

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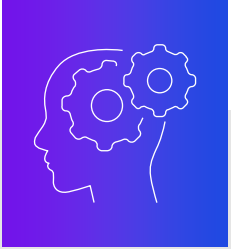
Q4 2024



# Executive summary



# Executive summary



## AI Agents

- Over half (51%) of organizations are exploring the use of AI agents and another 37% are piloting AI agents.
- Leaders expect to utilize the capability for administrative duties (60%), call center tasks (54%) and to develop new business materials (53%), within the next 12 months.
- Currently, only 12% of respondents have deployed AI agents for use across their organizations.



## Workforce

- As organizations tackle cybersecurity and data quality challenges, Chief Information Officers (71)% are increasingly leading AI initiatives more so than CEOs (17%) and Chief Innovation Officers (10%).
- More than 80% are planning to include GenAI as part of their organization's formal performance development track. Yet just a quarter (24%) of employees are currently leveraging AI embedded into existing workflows at least weekly.
- Counter to traditional bottom-up technology adoption patterns, leaders appear to be utilizing GenAI more than middle to entry level employees, suggesting the possibility of underreported usage and governance gaps across the enterprise.

# Business Growth & Investment

Do you believe that AI will help you achieve the following within the designated time periods?



## *In the next year...*

**70%** of business leaders believe AI will help their organization run a better business.

**56%** of business leaders believe AI will fundamentally change their organization's business.



## *In the next two years...*

**91%** of business leaders believe AI will help their organization run a better business.

**67%** of business leaders believe AI will fundamentally change their organization's business.

To what extent are the following factors influencing your AI strategy today (top choices of “great concern”)?

**88%**

Macroeconomic factors (GDP growth, inflation, etc.)

**61%**

Pressures to improve efficiency

**55%**

Limitations on hiring, upskilling

**47%**

Need to manage increased workloads or volume of tasks

**47%**

Need to demonstrate value to investors

**46%**

Opportunity to identify new revenue opportunities

# Business Growth & Investment (continued)

Which of the following best describes the phase your organization is in its GenAI journey?

	6 months ago	Today	6 months from now
Research and development (understanding the technology and its potential)	<b>55%</b>	8%	4%
Experimentation (proof-of-concepts or pilots, identifying areas of improvement + opportunity)	14%	16%	21%
Strategic planning (establishing a roadmap, KPIs and data management infrastructure)	20%	26%	19%
Scaling the technology (enterprise-wide adoption and optimization, measurable outputs)	10%	<b>50%</b>	25%
Established ROI (experiencing meaningful business outcomes, tangible growth and opportunity)	1%	0%	<b>31%</b>

How much in USD does your organization plan to invest in Gen AI over the next 12 months (e.g., training, technology, compliance, talent, etc.)?

	Q1 2024	Q4 2024
Under \$10 million	14%	8%
\$10 – 49 million	18%	22%
\$50 – 99 million	23%	49%
\$100 – 249 million	22%	19%
\$250 – 499 million	15%	1%
\$500 million or more	6%	1%
We do not plan to invest in Gen AI over the next 12 months	3%	0%

# Business Growth & Investment (continued)

How important is investor pressure as it relates to demonstrating ROI on your organization's GenAI investment?

31%

Very important

37%

Important

32%

Somewhat important

How are you measuring your organization's ROI related to GenAI?\*

	Q1	Q2	Q3	Q4
Improved productivity	51%	40%	36%	79%
Improved profitability	35%	27%	38%	73%
Revenue generated	47%	52%	51%	41%
Employee adoption	0%	0%	0%	10%
Employee AI learning and development	0%	0%	0%	12%
Improved performance or higher quality of work delivered by employees	0%	0%	0%	13%
Improved analytics used by C-suite in business decision making	0%	0%	0%	16%
Other (please specify)	0%	0%	0%	0%
None of the above	0%	0%	0%	0%

0% categories reflect new choices in Q4 not included in previous quarters. \*

# Challenges & Risks

Which of the following do you expect to be the biggest challenges in your GenAI strategy in 2025 (top 3 choices)?

**85%**

Quality of organizational data

**71%**

Risk management such as data privacy and cybersecurity

**46%**

Employee adoption

Which of the following best describes risk mitigation measures your organization is putting in place when it comes to AI-agents?

**11%**

We are developing AI agents in-house only

**29%**

We are not yet comfortable with autonomous agents and will require human-in-the-loop oversight

**31%**

We are not allowing AI agents access to sensitive data without human oversight

**47%**

We are looking at AI agents as augmented support for our employees and providing training to our workforce

**23%**

We are looking to deploy AI agents developed by trusted tech providers

# AI Agents

In what capacity is your organization engaging with AI agents?

51%

Exploring the possibility of using AI agents

37%

Piloting AI agents

12%

Deploying AI agents

In the next 12 months, would you consider integrating an AI-agent, to assist with any of the following tasks in your organization?

	We already use an AI agent for this	Yes, and we have plans to do so	No, and we have no plans to do so
Professional coaching	42%	39%	19%
Acting as call center agents	16%	54%	30%
Analyzing complex data sets	70%	23%	7%
Performing administrative tasks (i.e., scheduling meetings)	27%	60%	13%
Recruiting and sourcing new employee candidates	15%	50%	35%
Developing new business materials (e.g., pitch decks and proposals)	23%	53%	24%
Conducting employee reviews	27%	30%	43%
Releasing a custom AI agent for our clients or customers	21%	29%	50%



# Workforce & Talent

Who is leading AI-related initiatives at your organization?

71%

Chief Information Officer

17%

CEO

10%

Chief Innovation Officer

Have you recruited new board members to help enable an organizational GenAI strategy?

7%

Yes

91%

No, but we plan to do so

2%

No, and no plans to do so

Is GenAI part of your formal performance development track at your organization?

19%

Yes

81%

No, but we plan to include it

0%

No, and no plans to include it

# Workforce & Talent (continued)

How often is your organization's workforce using the following?

	Daily	Once a week	Once a month	Less than once a month	Never
GenAI productivity tools (e.g., Microsoft Copilot)	22%	<b>54%</b>	14%	10%	0%
GenAI agents or knowledge assistants (Retrieval augmented generation (RAG) is a technique used to augment interactions with AI, using external data such as a specified set of documents, to respond to user questions)	2%	<b>48%</b>	29%	6%	15%
GenAI embedded into existing workflows	0%	24%	<b>56%</b>	9%	11%

To what extent are GenAI tools used by employees at your organization?

	1 – Not used at all				5 – Used a significant amount
C-suite	0%	3%	26%	<b>57%</b>	14%
Executive management	0%	8%	34%	<b>51%</b>	7%
Entry level employees	14%	<b>40%</b>	31%	15%	0%
Middle managers	8%	13%	<b>53%</b>	26%	0%

# Methodology

*Results compiled in December 2024*

- U.S. based companies with \$1 billion or more in revenue
- **65%** public companies, **35%** private companies
- **100** individuals surveyed; **20%** CEO/President, **30%** other C-level, **50%** EVP or MD
- **51%** represent companies with 10,000 or more employees

## Functional breakdown:





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