DIGITAL
LEADERS

2024 STATE OF AI REPORT

A Review of this year's AI Surveys

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FOREWORD

As we come to the end of 2024, the transformative potential of AI has become increasingly evident, presenting both remarkable opportunities and significant challenges for organisations and society at large. With the world's biggest technology companies investing billions of dollars to drive AI forward, the UK is looking to emerge as a pivotal player in this global technological landscape, with strategic initiatives aiming to position us at the forefront of AI innovation.

The genesis of this report emerged from a critical inquiry by the Digital Leaders Advisory Board following the publication of Digital Leaders AI Attitudes Survey in March 2024. Their request to conduct a comprehensive review of existing AI surveys across various sectors presented a unique opportunity to synthesize and analyse the most significant research of the year.

The resulting "Digital Leaders 2024 State of AI Report" brings together a collection of disparate findings to provide a curated and coordinated set of insights to broaden our understanding of the current AI ecosystem. From the pioneering research of the Alan Turing Institute to the UK government's strategic National AI Strategy, this report captures the multifaceted nature of AI's advance. It represents a critical resource for leaders seeking to understand the broader implications of AI.

We extend our sincere appreciation to Professor Alan Brown and the Digital Leaders team, whose careful analysis and commitment to excellence have made this comprehensive review possible. Thanks is also due to our four expert commentators: Lynne Peabody, CEO EY Foundation; Jo Miller, Director of Technology, UK Civil Service; Christine Ashton, CEO, UKRI; Rashik Parmer, CEO, BCS and David Lawton, CIO Informed Solutions.

As we reflect on the year's developments, it becomes clear that our relationship with AI is about more than technological capability. It is fundamentally about responsible innovation – ensuring that our technological progress aligns with our core societal values and ethical considerations.

This inaugural report is supported by Informed Solutions, leading AI experts. It is the first step in what promises to be an ongoing dialogue about the role of AI in our collective future. We invite readers to approach these findings with both intellectual curiosity and strategic consideration, recognising that the insights contained here are not merely academic observations, but potential roadmaps for organisational and societal development.

To the leaders, innovators, and visionaries who are charting the course of this technological revolution: this report is for you.

Sabby Gill
Chair, Digital Leaders

EXECUTIVE SUMMARY
A Year of AI Insights

DIGITAL LEADERS

2024 has been a landmark year for artificial intelligence (AI), characterised by rapid advances and growing integration across industries. This has fuelled excitement and investment but also brought challenges, including exaggerated expectations, ethical concerns, and barriers to scaling adoption. To establish the current state-of-the-practice in AI, this report synthesizes findings from 23 AI surveys, representing nearly 40,000 respondents, to identify trends, insights, and actionable priorities for digital leaders.

Overall, the report identifies the significant tensions now being experienced by digital leaders and decision makers as they seek to adopt AI responsibly. By bringing together this broad sample of AI surveys from throughout 2024, the report highlights the opportunities and challenges presented by AI, and brings into focus the difficult balance that must be established to manage the risks and deliver measurable value in 2025 and beyond.

KEY THEMES

1. Awareness & Attitudes

- While public understanding of AI is growing, perceptions remain divided between optimism and scepticism.
- Clear communication and education are needed to dispel myths and build trust.

2. Technological Advances

- Breakthroughs in AI tools like Generative AI (GenAI), machine learning, and natural language processing have driven innovation.
- Significant adoption challenges remain, including high costs, technical complexity, and integration issues.

3. Risks & Harms

- Ethical concerns, such as bias, accountability, and transparency, are major public and organisational priorities.
- Trust is key, requiring careful attention to concerns about data privacy, mis-information, and data rights.

4. Adoption & Scaling

- Adoption is widespread for some tasks and industries, but broader scaling is hindered by cultural barriers, organisational resistance, and a lack of skilled talent.
- Strategic alignment and leadership commitment are critical to overcoming these hurdles.

5. Jobs & Skills

- AI is transforming the workforce, creating new roles but also sparking employment fears and risking significant job displacement.
- Upskilling and reskilling efforts, essential to preparing employees for AI's evolving demands, are not yet widely available.

PRIORITIES FOR 2025

Maximising Value & Return on Investment

- Focus on high-impact use cases and measurable outcomes.
- Ensure data quality and collaboration between business and IT to drive efficiency.

Strengthening Regulation & Governance

- Develop and implement ethical guidelines and global standards for responsible AI use.
- Enhance transparency and explainability to build stakeholder trust.

Fostering Discovery & Dissemination

- Invest in education, research, and collaboration to align on best practices and democratise access to AI tools.
- Prioritise professionalisation in AI delivery, particularly within the public sector.

A VISION FOR AI IN 2025

The evolution of AI holds immense potential to reshape industries and society. However, delivering AI at scale requires overcoming financial, structural, and organisational barriers. Digital leaders must navigate these challenges by balancing innovation with ethics, ensuring that AI adoption contributes to a fairer, more sustainable future.

As we move forward, success will hinge on measurable Return on Investment (ROI), robust governance, and fostering collaboration across sectors. By embracing ethical principles and prioritising human values, leaders can unlock AI's full potential responsibly and equitably.

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INTRODUCTION
A Year of AI Insights

There is no doubt that 2024 has been a watershed moment in the evolution of AI. The rapid advances in AI technologies, coupled with their increasing integration into a wide variety of sectors, has sparked significant interest and investment. This is already yielding tangible benefits. Yet, inevitably, the speed of its development has also led to hype, exaggeration, and confusion surrounding the current state of AI and its real-world use. As a result, the best ways to address important questions about the most effective ways to adopt AI responsibly and efficiently remain unclear.

To gain a handle on these issues, we have seen a proliferation of AI surveys conducted by a diverse range of organisations, from academic institutions and government agencies to corporations and non-profit groups. These surveys have explored a wide spectrum of AI-related topics, including technological capabilities, adoption rates, ethical implications, and societal impact.

Across the broad landscape of AI surveys in 2024, researchers, policymakers, and industry experts have offered insight into:

- **Technological advances:** Surveys have assessed the latest developments in AI algorithms, hardware, and software, including breakthroughs in natural language processing, computer vision, and machine learning.

- **Adoption rates and trends:** Studies have examined the extent to which AI technologies are being adopted across different industries and regions, identifying factors that drive or hinder adoption.

- **Ethical considerations and responsible AI:** Surveys have explored the ethical implications of AI, including issues such as bias, fairness, transparency, and accountability.

- **Societal impact and future implications:** Studies have analysed the potential societal benefits and risks of AI, considering its impact on employment, economic growth, and social norms.

- **Public perception and attitudes:** Surveys have gauged public opinion on AI, assessing levels of trust, concern, and excitement about the technology.

This report provides a review of the state of AI in 2024 by synthesizing the findings of 23 surveys representing the opinions of almost 40,000 individuals. Based on this sample, our report identifies common themes and highlights key lessons for digital leaders and decision-makers.

Many AI surveys have been conducted throughout the year. By reviewing the focus and results of these studies, we gain valuable insights into the current state of AI, emerging trends, and potential future directions. Reviewing a cross-section allows us to gain a sense of both what questions are being asked and how the findings are being reported. While the results of each AI survey vary depending on its specific methodology, sample size, and target audience, several common trends and insights have emerged. Through these observations, we can look ahead to the priorities of AI in 2025 and identify the opportunities and challenges that will shape AI's future directions.

Of course, there is no attempt here to review all AI surveys conducted throughout the year. Although such a task would provide a useful catalogue of data, it would require significant resource beyond our remit. Rather, we aim to establish a common perspective by considering a broad sample of AI surveys to make observations on the data collected and highlight the key insights they offer. By understanding these diverse viewpoints, we bring important context to inform AI strategies being adopted in the public and private sectors as we navigate the complex landscape of AI to responsibly harness its power and deliver value to business and society.

AI SURVEY THEMES

In this review we selected 23 AI surveys as the basis for our observations covering a broad set of issues and constituencies. The diverse characteristics of these surveys reflects the multifaceted nature of AI itself. The technology has the potential to revolutionise countless industries, from healthcare and finance to transportation and education. However, it also raises significant challenges, such as the risk of job displacement, the potential for malicious use, and the need for robust regulatory frameworks. The surveys we examined offered useful insights into many of these concerns.

In reviewing this sample of AI surveys, 5 key themes were observed as key indicators of the state of AI in 2024. Here, we provide an overview of these themes, together with a brief commentary from leading experts based on their perspective of the state of AI today. (A full list of the reviewed AI surveys and their main characteristics are provided in the Appendix).

AWARENESS & ATTITUDES

Public awareness of AI is growing, but understanding of AI varies widely. While many people are familiar with the term "AI," deeper knowledge of its applications and implications is often limited. Attitudes toward AI are also diverse, ranging from excitement and optimism to fear and scepticism. For example, this range of views is seen in a US public attitudes survey [5] which classified 37% of Americans as "AI optimists", while 29% were considered "AI ignorant" and 34% as "AI abstainers".

Ethical concerns about AI are increasingly prominent, with issues such as bias, privacy, and autonomy at the forefront. In Elsevier's survey of 2,999 clinicians and researchers [2], for instance, 86% of respondents feared AI would cause critical errors or mishaps in a medical setting. More generally, public trust in AI is a critical factor, and transparency, accountability, and responsible development are essential to building and maintaining that trust.

Observations for Digital Leaders and Decision Makers:

1. **Prioritise AI Literacy**: Invest in initiatives to educate the public about AI, its benefits, and potential risks. Clear and accessible communication can help dispel misconceptions and build trust.

2. **Engage with Stakeholders:** Engage with various stakeholders, including employees, customers, and policymakers, to understand their perspectives on AI. This will help identify potential concerns and opportunities.

3. **Monitor Public Sentiment:** Continuously monitor public opinion on AI through surveys, social media, and other channels. This will ensure timely responses to emerging issues and trends.

Lynne Peabody CEO, EY Foundation

A key challenge faced by the UK is to provide employability skills to young people from a low-income background. For this group, the impact of AI could be transformational – helping to unlock potential and level the playing field for those often denied the opportunity to succeed. Examples of how it can do this is by filling educational gaps, increasing knowledge about career options, and providing tailored skills training.

To fully realise the opportunity of AI, this report rightly identifies the need for meaningful engagement with stakeholders to help shape its development. From the EY Foundation's perspective, this means working with young people from a low-income background in the design and delivery of AI-based interventions to ensure they reflect real life experiences and meet their specific needs.

One of those needs is AI literacy. And while having the technical aptitude to use AI tools will be important, what can be overlooked is the requirement for less technology-focused skillsets. Most notably, humancentric skills will be increasingly relevant in the workplaces of the future. Our ability to demonstrate empathy, communication, teamwork, and a growth mindset will be what differentiates humans from machines.

At the EY Foundation, we are exploring how to combine technical and softer human focused skills training. One approach we have taken is to adapt the format of our employability skills programmes to deliver technical AI skills alongside emotional intelligence training. Initial results have been encouraging, with participants showing increased AI knowledge, for example a 59% increase in understanding of AI bias, and a rise in softer skills, such as a 34% increase in confidence working in a team. Looking ahead, we recognise the importance of continuing to explore how we can build technical and humancentric skills in the most effective way.

TECHNOLOGIES & TOOLS

The AI landscape is rapidly evolving, with the adoption of new technologies and tools at an unprecedented pace. A study from Wharton Business School [11] found that the number of organisations using GenAI on a weekly basis had risen from 37% in 2023 to 72% in 2024.

While GenAI tools were the most prominent, machine learning, natural language processing, and computer vision were also highlighted as key AI technologies driving innovation in various sectors.

Despite the pace of AI tool adoption, on-going technology challenges can inhibit their adoption at scale. The Make UK and Autodesk survey of UK manufacturers reported that barriers to AI adoption are substantial [23]. The most cited challenges included systems integration issues (44%), high costs of technology (44%), and technical complexity (39%).

Access to AI technologies and tools varies significantly across different regions and organisations. While large tech companies and research institutions have access to advanced AI capabilities, smaller organisations and constituencies may face challenges in adopting and implementing AI solutions, as highlighted in bsi's "International AI maturity model" [1].

Observations for Digital Leaders and Decision Makers:

1. Stay Updated on AI Trends: Keep abreast of the latest AI advancements and their potential applications. This will help identify opportunities to leverage AI for competitive advantage.

2. Invest in AI Talent: Recruit and retain skilled AI professionals to drive innovation and development. Consider partnerships with academic institutions and research organisations to access talent and expertise.

3. Build a Robust AI Infrastructure: Invest in the necessary hardware, software, and data infrastructure to support AI initiatives. This will ensure that AI projects can be implemented efficiently and effectively.

Christine Ashton CIO, UKRI

As this report highlights, 2024 has seen rapid advances in AI technologies, with all organisations feeling the impact. The acceleration of AI adoption reflects its transformative potential and growing accessibility. However, disparities persist. Larger, established organisations often have the resources to experiment, iterate, and refine AI strategies, while smaller organisations frequently rely on vendor solutions, risking fragmented systems and widening gaps in how value can be derived from AI.

IT leaders are not only driving AI adoption across their organisations but are also leveraging AI to enhance their own operations. AI has the potential to revolutionise IT by automating routine tasks, such as incident management and software deployment, allowing teams to focus on innovation and strategic priorities. To fully realise these benefits, organisations must prioritise streamlined AI tool adoption and ensure efforts are focused on delivering meaningful value and cost efficiencies.

A critical step is embedding design thinking into AI strategies. This user-centred approach helps tailor AI solutions to the specific needs of an organisation, aligning innovation with purpose. Additionally, raising workforce capability through targeted training and upskilling is essential. By investing in talent and fostering a culture of learning, organisations can maximise AI's potential while building resilience and adaptability for the future.

RISKS & HARMS

While AI offers numerous benefits, it also poses significant risks, including the potential for bias, discrimination, and misuse. Ensuring the safe and ethical development and deployment of AI is essential to mitigate these risks, and was highlighted as a key concern in Deloitte's state of GenAI report [14]. Similarly, the Digital Leaders AI Attitudes survey found that over 90% of respondents were worried about data privacy.

Robust governance frameworks, ethical guidelines, and regulatory oversight are necessary to address the challenges associated with AI.

The UK National Audit Office's (NAO) survey of AI in government [16] only 30% of all survey respondents reported that they had risk and quality assurance processes that explicitly incorporated AI risks. Similarly, EY's 2004 Financial Services AI Survey [22] found that only 9% of leaders say their firm is prepared for incoming regulation and 14% do not have an AI regulatory risk framework in place.

Observations for Digital Leaders and Decision Makers:

1. Establish Ethical Guidelines: Develop and implement clear ethical guidelines for AI development and use, ensuring fairness, transparency, and accountability.

2. Prioritise Data Privacy and Security: Protect sensitive data and implement robust security measures to prevent data breaches and misuse.

3. Monitor and Mitigate Bias: Regularly assess AI systems for bias and take steps to mitigate it.

Jo Miller Director of Technology, UK Civil Service

As the geopolitical landscape (and technological landscape) becomes more dynamic and contested, and as our adoption of AI models and systems broadens and deepens, being clear about the threats posed by AI and our ability to respond to and recover from them (our resilience) is paramount.

Balancing the security of the development and adoption of AI systems, the safety of those systems, and evaluating their vulnerability to misuse, is a key function of the now-global network of AI Safety Institutes. Whilst industry leaders and Government officials are also building on the UK-led research into AI security to develop a code of practice for secure AI systems development, which is being used to underpin global AI security standards; addressing the needs identified in Deloitte's report and the YouGov survey.

Key issues that come to the fore in these discussions include, firstly, sovereignty - a nation's ability to use AI, independent of others and/or a nation's autonomously-developed AI technologies, and thereby protected equities. Secondly, resilience - that of our critical national infrastructure and Government systems, but just as importantly the resilience of our small and medium-sized enterprises, large companies' infrastructure, charities and academic institutes.

Our ability, organisationally, to prepare for, respond to, and recover from AI-enabled threats. And lastly, value creation - how we build and nurture an AI security and safety ecosystem, around education, standards and accreditation, professional services and certification, research, and pulling AI innovation through to tangible growth. We have done this across many sectors before - cyber security being one, and a sector now worth multiple billions in the UK - and AI security and safety offers us the same growth opportunities.

What levers we see developed, nationally and internationally, will range in 2025 from market incentives to accelerate the pull-through of AI innovations into real value creation, to industry-led standards developed through international partnering, to legislation and regulatory frameworks to tackle the key challenges that come with AI use and misuse. And that is not an exhaustive list. Regardless, our approach must be one built on effective partnering across sectors and industries - a key feature of 2024, and a necessity for 2025.

ADOPTION & SCALING

The adoption of AI varies across industries and regions, with broad use in tasks such marketing and customer service and increasing impact in domains such as financial services and healthcare. For instance, the Bank of England's review of the use of AI in finance [18] reported that 75% of finance firms already use AI with more planning to join them. However, these surveys also report that many organisations still face challenges in scaling AI initiatives.

Cultural barriers, organisational resistance, and lack of skilled talent are among the key factors hindering AI adoption according to Section's AI proficiency report [12]. They note that 82% of those surveyed were AI "newcomers" or "experimenters" without the necessary proficiency to see significant productivity gains.

Overcoming these challenges requires a strategic approach to AI adoption, including leadership commitment, strong change management, and a focus on building an AI-ready workforce. BCG's review, "Where's the Value in AI", surveyed 1,000 CxOs and senior executives [10] and found that leading the organisations focus on core business processes and support functions. They seek to deploy AI for productivity, to reshape processes and functions, and to invent new revenue streams.

Observations for Digital Leaders and Decision Makers:

1. Develop a Clear AI Strategy: Define a clear AI strategy aligned with industry norms and business objectives. This will help prioritise AI initiatives and allocate resources effectively.

2. Foster a Data-Driven Culture: Encourage a data-driven culture that values data quality, privacy, and security. This will create a strong foundation for AI initiatives.

3. Collaborate with Partners and Ecosystems: Collaborate with other organisations, startups, and academic institutions to accelerate AI adoption and innovation.

David Lawton CIO, Informed Solutions

2024 has witnessed an explosion of AI pilot projects across the UK, but only a small proportion have developed into impactful, national-scale AI services. This gap reveals a pressing need for organisations to address foundational issues around their AI readiness. Gaps in data quality, cultural alignment, skills, technical architecture, and trust are holding back progress. These must be addressed if we are to expedite the shift from isolated, experimental AI tools to building national-level, scalable services and platforms that unlock the full operational benefits of AI-driven service transformation.

Where AI scaling has been successful, such as in NatureScot's efforts to revolutionise sustainable land management in Scotland and NHSE's use of AI to enable data-driven patient safety learning and improvement, the driving force has been deep collaboration and a user-focussed approach. Success stories like these highlight the power of bringing together subject matter, policy, and technical expertise to co-create solutions that are trusted, safe, and secure.

This collaborative approach plays a crucial role in upskilling teams, enabling a broader group to transition from AI "newcomers" (as found in one of the Survey's reviewed in this report) to "experimenters" and, further still into innovators. Successful partnerships foster environments where diverse expertise converges, creating opportunities to identify new applications for AI, explore critical considerations across ethics, privacy, and governance, and build momentum for responsible adoption.

By prioritising AI readiness and collaboration, organisations can develop the critical mass of skills, capabilities, and knowledge needed to adopt and scale AI rapidly and effectively. This, in turn, will drive exponential growth in AI-enabled transformation, benefiting not just individual organisations but the UK economy as a whole.

The path to adoption of AI at scale lies in organisational readiness, user engagement, transparency, and industry collaboration. 2024's lessons make it clear that these should be at the forefront of any AI strategy.

JOBS & SKILLS

AI has been found to have the potential to both create and displace jobs, leading to significant shifts in the labour market. As AI technologies advance, new job roles are emerging, requiring a different set of skills and competencies. Additionally, the impact on current jobs may be extensive. The bsi review of AI in the workplace [15] revealed that a significant portion of global leaders (83%) anticipate changes in manual roles, while 72% expect these roles to soon be fully automated. Knowledge-based roles are projected to undergo significant transformation, with the bsi report stating that 89% of those surveyed expect changes and 77% anticipate AI-driven replacement.

Upskilling and reskilling the workforce will be crucial to address the challenges and opportunities presented by AI. Investing in education and training programs can help individuals adapt to the changing job market and acquire the necessary skills to thrive in the AI era. Github's AI in software development 2024 survey of 2,000 software developers [21] found that a key is working with employees to improve trust, provide clear guidelines, and define measurable outcomes.

Observations for Digital Leaders and Decision Makers:

1. **Invest in Workforce Development:** Prioritise employee training and development to equip them with the skills needed to work effectively with AI.

2. **Anticipate Future Skills Needs:** Identify emerging skills gaps and develop strategies to address them proactively.

3. **Promote Ethical AI Practices:** Ensure that AI is developed and used in an ethical and responsible manner, considering the potential impact on jobs and society.

Rashik Parmar CEO, BCS

Advances in AI will impact the majority of the existing roles and require individuals to identify the ways they can continue to add value to the employer. Individuals can be considered in two groups, those that use AI tools as part of their role and those that create the AI tools for others to use.

AI consumers will need to understand the boundaries of the AI tools and develop techniques to assess the validity and relevance of results.

Being able to compare the results from two or more tools and deciding on appropriate actions will enable successful use. Awareness of ethical considerations that may arise using the tools will continue to be critical. Understanding the potential to disadvantage groups of employees, create in-humane workplaces or unintended consequences.

Society needs to be able to trust the AI creators and will look for proven means of demonstrating competence, upholding ethical principles, and having the relevant diversity of experiences. Such as being on a professional register and holding a relevant certification from a recognised professional body such as the Chartered IT Professional (CITP). They should also be held to account by a regulatory body with the powers to remove individuals from the register for failure to comply with the code of conduct, lack of competence, professional misconduct, or a criminal conviction. The AI tools should also be subject to assurance mechanisms that delve into the comprehensiveness of the training data, transparency of the AI decision pathways, and identify the ethical considerations based on the legal requirements for the territory.

FUTURE DIRECTIONS
& Impact in 2025

As we look ahead to 2025, the AI landscape is undoubtedly set for further evolution. The continued advances in AI technologies driven by widespread industry demand for greater efficiency will continue to shape the future of both the public and private sectors. Alongside explicit focus on areas where AI can bring benefits, we will also see implicit use of AI as its capabilities are adopted across the wide spectrum of the digital and products and tools we use daily. Thus, we can expect AI to play a leading role in redefining key elements of industries and society.

At the same time, while the potential benefits of AI are immense, over the coming year greater pressure will be applied to ensure organisations address the challenges and risks associated with AI's responsible development and deployment. Increasingly, leaders will be asked to demonstrate that they understand and are responding to the need for a fairer, more sustainable, and secure adoption of AI.

Based on our review of these recent AI surveys, we expect that in 2025 digital leaders will need to place their focus in three key areas:

- Maximising the value and return on investment of AI.
- Strengthening AI regulation and governance.
- Fostering discovery and dissemination of AI knowledge.

VALUE & ROI

Organisations are increasingly investing in AI, but also understand that realising its full potential requires a strategic approach to AI adoption. In 2025 the pressure will be to maximise value and ROI, with digital leaders increasingly focused on identifying high-impact use cases, prioritising projects with clear business objectives, and measuring the impact of AI initiatives.

Data quality and accessibility are critical factors for the success of AI projects. Ensuring data quality will remain a significant priority, enabling organisations to improve the accuracy and reliability of AI models, leading to better decision-making and increased efficiency. Additionally, collaboration between business and IT teams will be seen as essential to bridge the gap between AI capabilities and business needs in the search for measurable business improvements.

REGULATION & GOVERNANCE

As AI becomes more pervasive, the need for robust regulation and governance frameworks will be highlighted as increasingly important. New AI regulations to ensure AI safety are already coming into effect. However, there remains the question of implementing them effectively and efficiently. To address ethical concerns, mitigate risks, and promote responsible AI development, policymakers and industry leaders will need to redirect efforts in 2025 toward working together to establish clear guidelines and standards that can be practically applied.

Yet, beyond the regulatory imperative, transparency and explainability are key principles for ethical AI. A focus for 2025 will be making AI systems more transparent and understandable to enable organisations to build trust with stakeholders and ensure accountability. Additionally, international cooperation will increase its importance to develop global standards and norms for AI development and use that take account of a diversity of needs.

DISCOVERY & DISSEMINATION

Fostering innovation and collaboration in AI requires a strong ecosystem of research, development, and education. Both within and across organisations, alignment on key AI concepts, practices, and regulations is slowing the essential deployment of AI at scale. Increasing investment in 2025 will be necessary to accelerate sharing of knowledge, best practices, and open-source tools, thereby ensuring that the AI community can maintain momentum and democratise access to AI.

Similarly, continued investment in AI research and development is crucial to advance the state of the art. Supporting academic research, industry partnerships, and public-private collaborations can drive innovation and address emerging challenges. However, funding for such activities will come under increasing pressure in 2025. Renewed focus will be needed to ensure that this investment is targeted to lead to measurable impact across the public and private sectors.

To support this, AI education and training programs will need to be prioritised to increase professionalisation in AI delivery, especially within the public sector. This will help expand the skilled workforce needed to support AI's current momentum and foster a culture of AI literacy.

A FINAL WORD

Our review of AI surveys from 2024 reveals a mixed picture for AI adoption and deployment. While there has been significant progress and rising expectations for AI, broad acceptance and delivery of AI at scale has been slower than many anticipated. The fast pace of technical progress and a new wave of product announcements may have created a crescendo of experimentation with AI. However, much of this energy is not yet reaching mainstream adoption across organisations. Rather, digital leaders have been spending their time battling with a complex collection of financial, structural, organisational, and legal barriers that must be addressed in delivering any disruptive large-scale digital change programme.

Looking ahead, the future of AI holds immense promise, but only if we can overcome these significant challenges. In 2025, digital leaders will focus on maximising value, strengthening regulation, and fostering discovery and dissemination to navigate the complex landscape of AI. By doing so, they will reduce the barriers to delivering AI at scale and ensure the harnessing of AI's power to benefit their organisations and contribute to a fairer, more sustainable society.

As we continue this journey, attention will remain centred on demonstrating value and ensuring a measurable return on investment in AI deployment. However, these cannot come at the expense of broader risk and safety concerns as we move deeper into the age of AI. In moving forward, it is imperative for digital leaders that we embrace ethical principles, prioritise human values, and work collaboratively to shape a future where AI is used responsibly, efficiently, and effectively.

APPENDIX
AI Survey Sources

INTRODUCTION

In this section, we provide a summary of the AI surveys that have been reviewed within this study. Each survey is listed together with an outline of its main characteristics and findings.

While there has been no attempt to catalogue all the AI surveys conducted in 2024, we believe that this set of surveys offers a meaningful cross-section of those conducted throughout the year. By reviewing this sample, we hope to offer a fair representation of the current state of AI based on their focus and results.

To aid review, the surveys are categorised under three main themes:

- **Broad Attitudes Surveys:** Aimed at understanding the views on AI of a wide range of individuals or organisations.

- **Technology adoption Surveys:** Focused on learning about the adoption of AI technologies and tools in different constituencies.

- **Domain-Specific Surveys:** Directed at narrow audiences or limited communities of AI users to assess their progress with AI.

Further details on each of the AI surveys are available by consulting their sources in the links provided.

DISCLAIMER:

For the avoidance of doubt the Surveys included have been chosen by us as publicly available reports and we have had no contact with the reports authors and the interpretations of their findings as expressed in this report are entirely our own.

BROAD ATTITUDES SURVEYS

1. Trust in AI: Actions and attitudes around AI adoption - 2024

👤 **Commissioned by: bsi** and **Yonder Data Solutions**

📋 **Total surveyed:** 932 business leaders from 9 countries.

⚙️ **Method:** Broad survey with answers split by country and sector. Based on responses, an 'International AI Maturity Model' was created to assess the maturity of AI adoption across different countries and sectors (based on investment, adoption, confidence, training, communication, safety, innovation, and trust).

🎯 **Focus and Responses:** Survey showed large disparities in AI Maturity between countries and sectors. The UK ranked as one of the lowest by country and healthcare ranked the lowest by sector. Medium sized organisations employed the highest levels of AI maturity.

🔗 **Link:**
https://www.bsigroup.com/
siteassets/pdf/en/insights-
and-media/insights/white-
papers/trust-in-ai.pdf
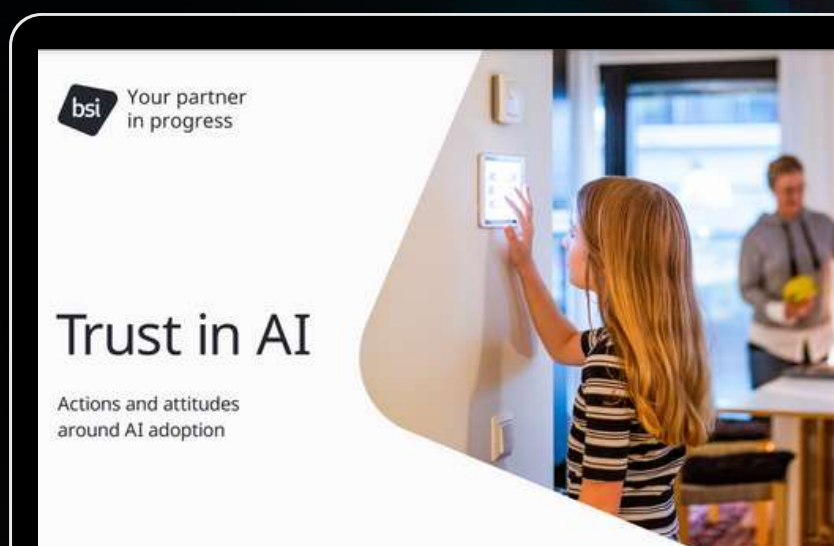
2. Insights 2024: Attitudes toward AI - July 2024

👤 **Commissioned by: Elsevier**

📋 **Total surveyed:** 2,999 clinicians and researchers from 123 countries.

⚙️ **Method:** Survey conducted between December 2023 and February 2024 targeting people working in research and health which included those who had published recently, voluntary sign-ups, and users of Elsevier.

🎯 **Focus and Responses:** Initial questions focused on the current AI landscape. 31% of respondents had used AI before for work purposes and 72% believed AI would significantly impact their area of work. Attitudes were gathered regarding the future of AI in health with 94% of respondents believing AI would accelerate medical research. Turning to concerns, the survey found that 86% of respondents feared AI would cause critical errors or mishaps in a medical setting. Based on the survey respondents, the report offers some recommendations to GenAI creators and clinical/research institutions.

🔗 **Link:** https://www.elsevier.com/en-gb/insights/attitudes-toward-ai

Insights 2024: Attitudes toward AI

Discover what researchers and clinicians around the world think about the use of AI in their work.

Read the full report

3. Balancing the human touch in the age of AI - 2024

Commissioned by: bluQube

Total surveyed: 250 senior directors of UK SMEs.

Method: Survey, unclear how participants were found/selected.

Focus and Responses: Survey focused on the 'human touch' in finance decisions and attitudes towards AI-based automation of a number of key financial actions including payroll, tax, and accounts. Participants were asked about the future they see for AI in financial services and their confidence in AI. Most significantly, the survey found 79% of respondents preferred to buy finance software if that software was supported by a human team, not AI helpers.

Link: https://pages.bluqube.online/human-touch-AI

bluQube

Balancing the human touch in the age of AI

bluQube report: Free Downlaod

Read our insightful report based on a survey of 250 senior directors of medium/large UK SMEs across multiple business sectors.
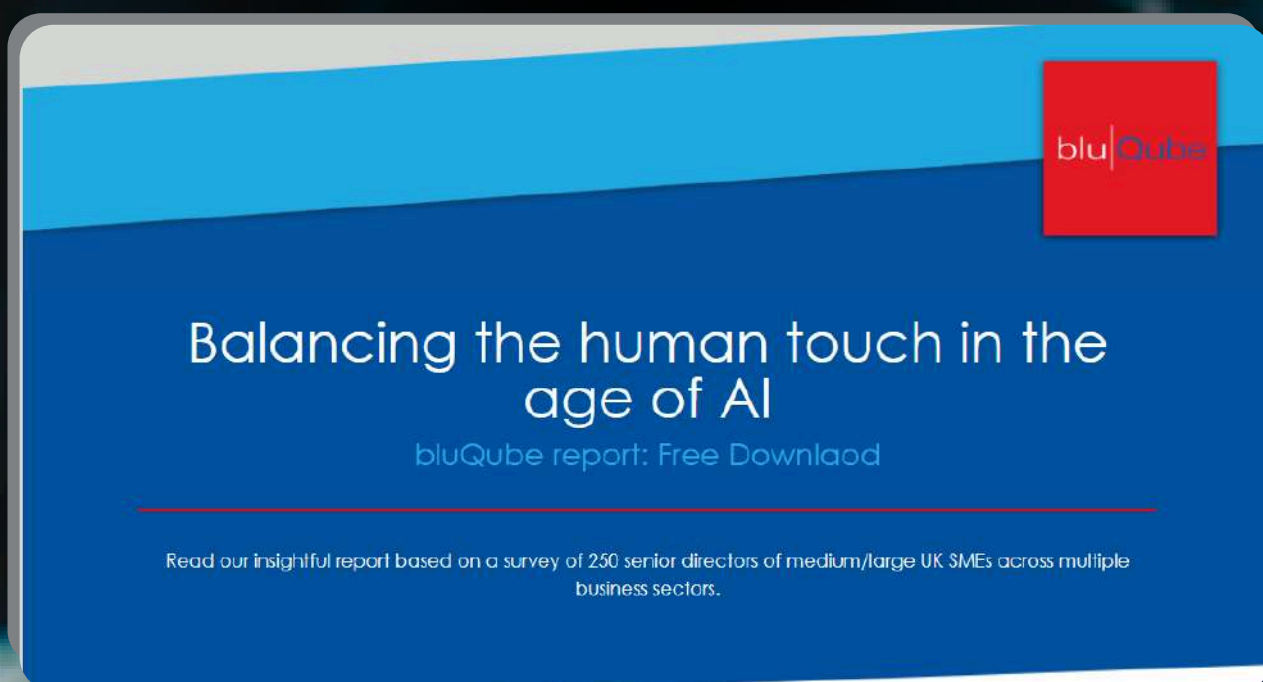
4. PwC's 27th UK CEO Survey - 15th January 2024

Commissioned by: PwC

Total surveyed: Unclear.

Method: Survey and selected interviews of UK CEOs.

Focus and Responses: The focus of the survey extended beyond AI but GenAI retained an exclusive section. Respondents reported on their adoption of GenAI and expectations in the next 12 months. Nearly two thirds (64%) say they expect to reskill most of their workforce within the next three years to capitalise on GenAI and a similar number (66%) believe GenAI will increase competition in their industry within the same time frame. A majority reported fear of GenAI contributing to the spread of misinformation in their business and nearly half feared legal liabilities.

🔗 **Link:** https://www.pwc.co.uk/ceo-survey.html

Time for reinvention: CEOs target the acceleration and elevation of critical change
27th UK CEO Survey
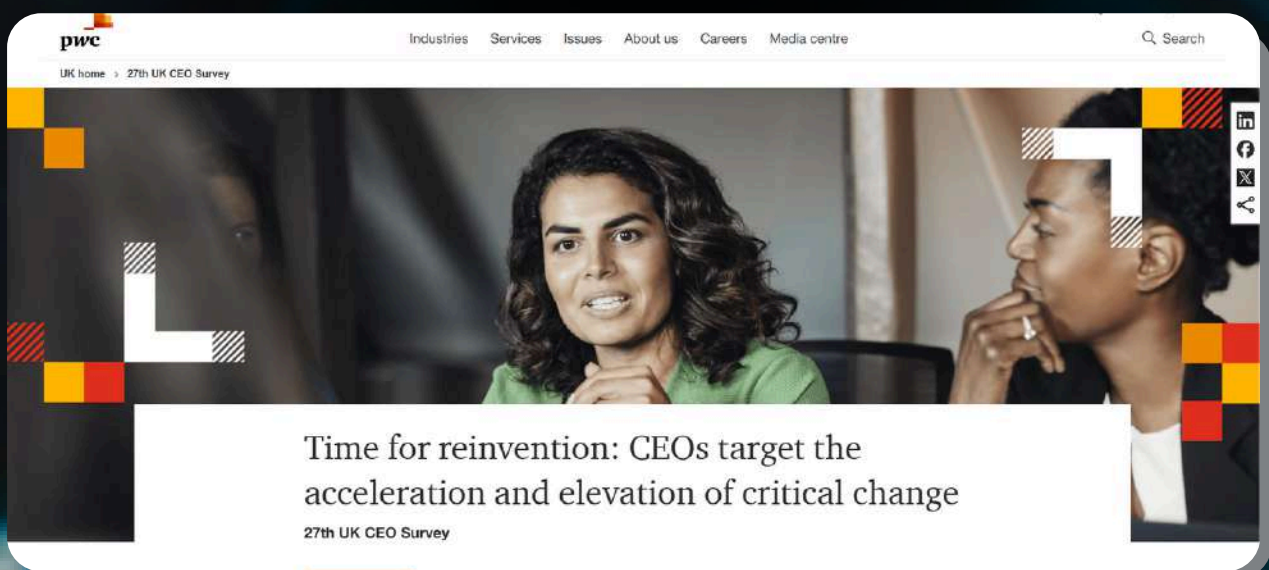
5. US public attitudes towards Artificial Intelligence (AI) -
9th July 2024

👤 **Commissioned by: YouGov**

📋 **Total surveyed:** The study involved three stages, all conducted in the US in 2023 and 2024, leveraging YouGov's research panel of 6+ million Americans. A parallel study was conducted in the UK.

⚙️ **Method:** YouGov conducted a mixed-methods study combining qualitative and quantitative research. They identified three distinct consumer segments based on their attitudes, understanding, and use of AI.

🎯 **Focus and Responses:** A focus on how Americans truly feel about AI and their perceptions of AI's current and future applications in fields like healthcare, education, law, and business. The findings reveal that 37% of Americans are AI optimists, while 29% are "AI ignorant" and 34% are "AI abstainers".

🔗 **Link:** https://business.yougov.com/content/49938-us-artificial-intelligence-report-2024

6. Digital Leaders AI Attitudes Survey – March 2024

👤 **Commissioned by: Digital Leaders**

📋 **Total surveyed:** Survey of the Digital Leaders community with 577 completed responses. The majority of respondents (50%) were from the public sector, with the remainder split between academia (5%), charity (17%), and the private sectors (28%).

⚙️ **Method:** Online survey of the membership of Digital Leaders.

🎯 **Focus and Responses:** The survey highlighted that AI is a major topic among digital leaders, with most survey respondents reporting weekly discussions and interactions with AI, and over a third using it daily. While ROI concerns exist (almost half unsure of positive impact), bigger issues lie in talent acquisition/retention and integrating AI into existing workflows (both cited by over half as significant barriers). Interestingly, job loss fears were a lesser concern for most respondents (less than a quarter). Reliability and data privacy are major issues, with less than a quarter confident in AI for critical tasks and over 90% worried about data privacy. There is a lack of preparedness for upcoming regulations and responsible AI frameworks, with over 60% of respondents expressing worries in these areas.

🔗 **Link:**
https://digileaders.kartr a.com/page/ai-survey-free-download

AI ATTITUDES SURVEY 2024

The Emerging Role of AI on Today's Digital Leadership

7. Gallup Culture of AI Benchmark Report – December 2024

👤 **Commissioned by: Gallup**

📋 **Total surveyed:** 40 European enterprise companies in 11 countries.

⚙️ **Method:** The study was executed in two phases: Initially, in-depth interviews were conducted with the global Chief Human Resources Officers (CHROs) of each organisation. These interviews were meticulously coded and analysed using generative AI; they also included quantitative questions. Subsequently, a comprehensive survey was conducted, engaging CHROs, Chief Technology Officers (CTOs), Chief Information Officers (CIOs), and HR People Analytics Leaders.

🎯 **Focus and Responses:** Employee enthusiasm for AI is low in Europe, with only 37% of employees showing high interest compared to over 50% in other regions. About half of leaders surveyed feel comfortable using AI themselves, but six in 10 companies said their leadership teams are less at ease. Seven in 10 leaders stated their employees are not prepared to work with AI.

🔗 **Link:**

https://www.gallup.com/workplace/652784/culture-of-ai-and-adoption-report.aspx

GALLUP

2024

Culture of AI Benchmark Report

State of AI Adoption and Culture Readiness in Europe
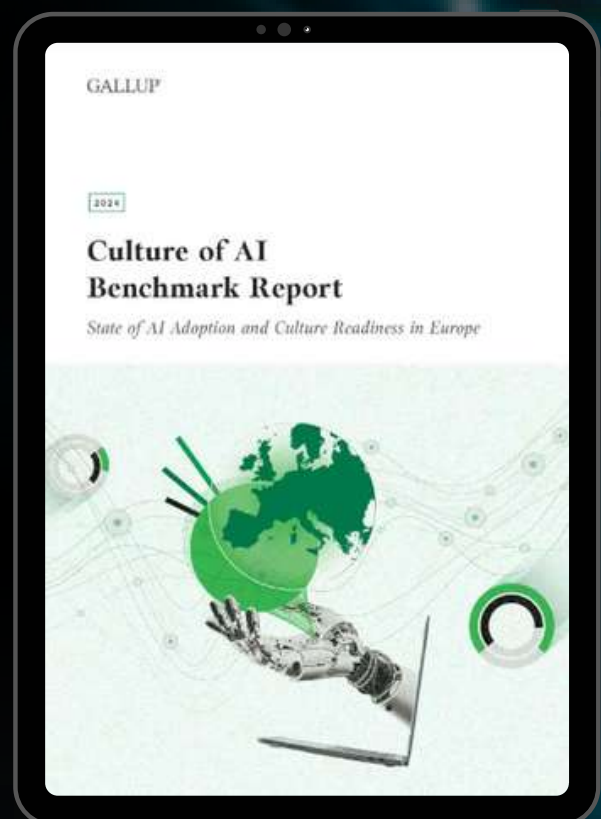
TECHNOLOGY ADOPTION SURVEYS

8. British Chambers of Commerce Employment Trends Report 2024 - July 2024

👤 **Commissioned by:** **British Chamber of Commerce and Pertemps Network Group**

📋 **Total surveyed:** 1,238 UK businesses

⚙️ **Method:** Unclear how participants were selected. Answers apparently weighted but no methodology was given.

🎯 **Focus and Responses:** Adaptation to AI by UK businesses forms a subsidiary part of the report. Usage of AI is assessed among a number of sectors and firm sizes. Self-assessments of productivity gains are also measured by the survey with a sizable minority reporting an expectation or experience of productivity gains. Some very brief recommendations are provided.

🔗 **Link:** https://www.britishchambers.org.uk/news/2024/07/most-smes-still-struggling-to-embrace-a
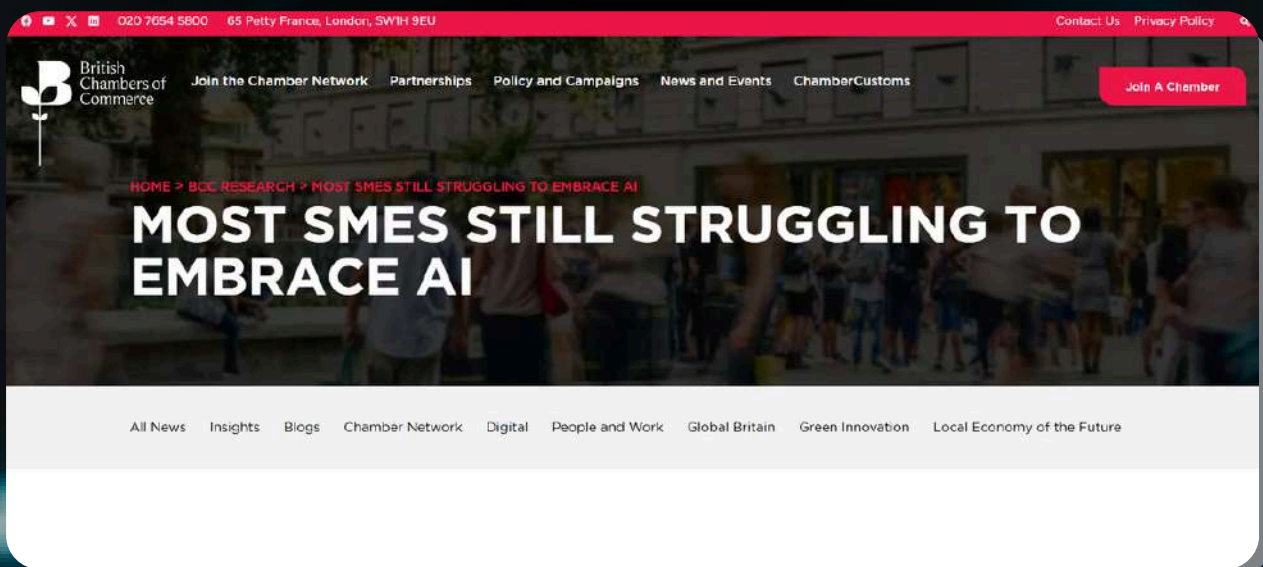
9. 2024 Cloud and AI Business Survey - July 2024

👤 **Commissioned by: PwC Research**

📋 **Total surveyed:** 1,030 executives in the USA.

🔧 **Method:** Respondents were all from US companies that generate at least $500m in revenue. Respondents came from a range of sectors with Media the largest (22%) and mining the smallest (6%).

🎯 **Focus and Responses:** Found a group of 'Top Performers' (12% respondents) reaping rewards of early investment in AI. 88% found early returns on GenAI and 41% report better customer experience. The report also looks at risk and responsible AI practices.

🔗 **Link:** https://www.pwc.com/us/en/tech-effect/cloud/cloud-ai-business-survey.html
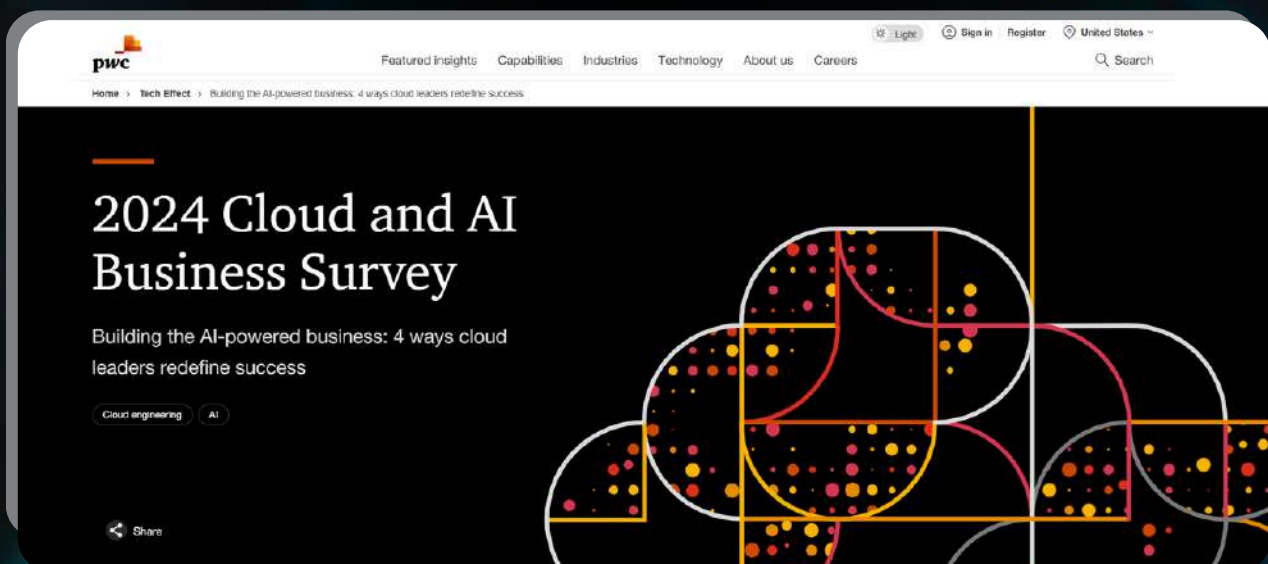
10. Where's the Value in AI? - October 2024

Commissioned by: BCG

Total surveyed: 1,000 CxOs and senior executives across 20 sectors and 59 countries.

Method: Created a weighted 'AI Maturity' score for responses based on 30 enterprise foundational capabilities which divided respondents between 'AI stagnating', 'AI emerging', 'AI scaling', and 'AI future-built'.

Focus and Responses: Who are the AI leaders and what are they doing? 26% of respondents were considered 'leaders' and were found to be deploying AI to support core business functions and focus on productivity gains. The survey also asked where is the value in AI? Again, it found 62% of AI value was found in core business processes. The survey also includes a 7-point plan sharing strategies for creating value from AI.

Link: https://www.bcg.com/publications/2024/wheres-value-in-ai
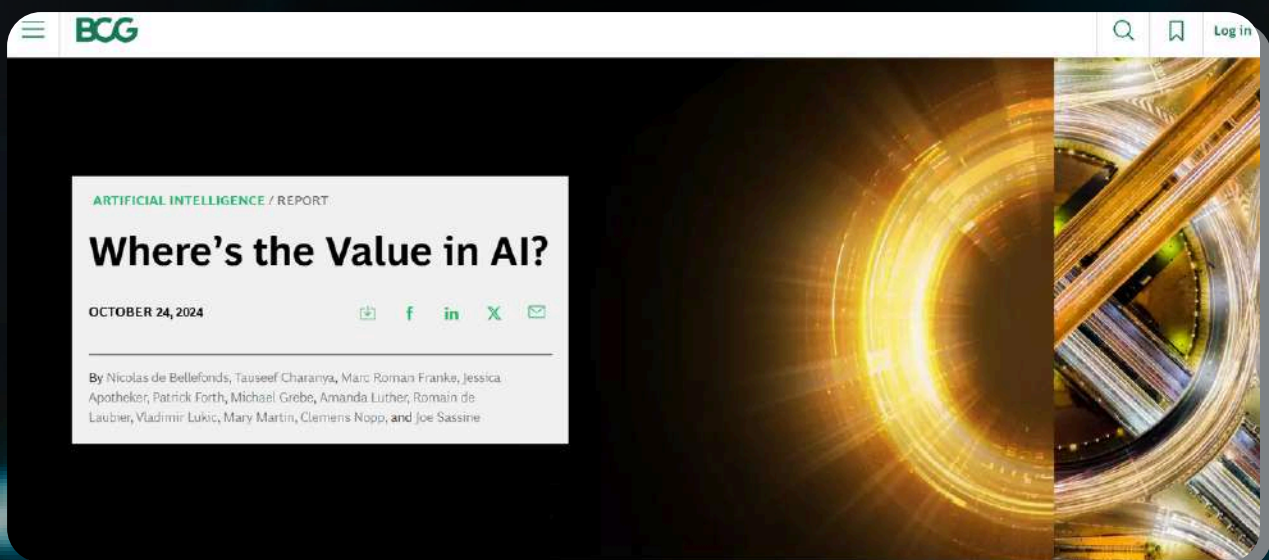
11. Growing Up: Navigating Gen AI's Early Years -
21st October 2024

👤 **Commissioned by: AI at Wharton (University of Pennsylvania) and GBK Collective**

📋 **Total surveyed:** 802 commercial organisations based in the USA with 1000+ employees.

⚙️ **Method:** 15-minute online quantitative tracking survey

🎯 **Focus and Responses:** The survey found a significant rise in the number of organisations using GenAI on a weekly basis (from 37% in 2023 to 72% in 2024). Spending on GenAI had also more than doubled in the same timespan. The survey also asked about future spending, noting that responses showed a slowdown on the horizon.

🔗 **Link:** https://ai.wharton.upenn.edu/focus-areas/human-technology-interaction/2024-ai-adoption-report

Growing Up: Navigating Generative AI's Early Years – AI Adoption Report

Wharton · AI at Wharton · GBK COLLECTIVE

GROWING UP:
Navigating Gen
AI's Early Years
AI ADOPTION REPORT

12. The AI Proficiency Report - 1st August 2024

👤 **Commissioned by: Section**

📋 **Total surveyed:** 1,000+ US, Canadian, and UK knowledge workers

⚙️ **Method:** Tested participants' proficiency in creating simple prompts for LLMs.

🎯 **Focus and Responses:** To measure AI proficiency (not just usage) in the North American and UK workforce. They found that just 7% of professionals surveyed had a high proficiency in using AI but that these 7% of workers saved up to 12 hours of work per week. The survey also found that 82% of those surveyed were assessed as AI "newcomers" or "experimenters" but lacked the necessary proficiency to see significant productivity gains.

🔗 **Link:**
https://www.sectionschool.com
/ai/the-ai-proficiency-
report#download
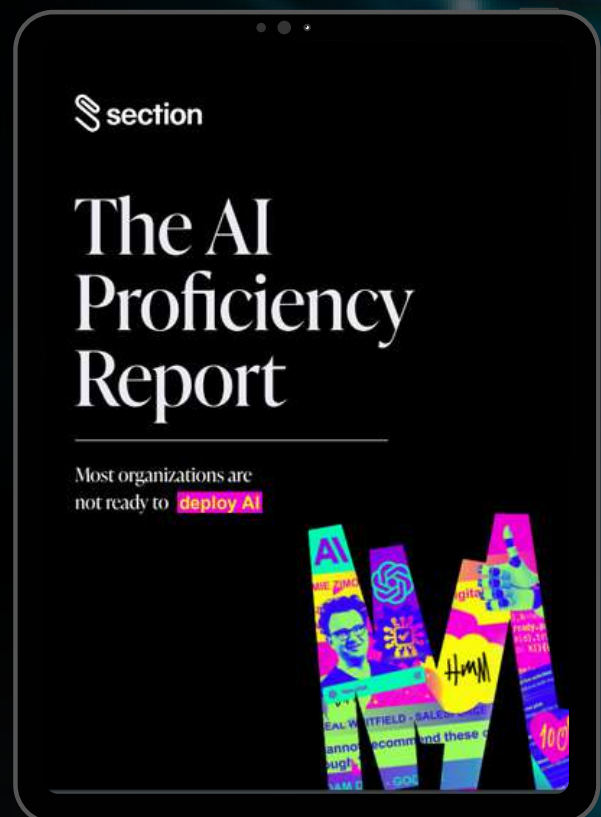
13. 2024: The State of Generative AI in the Enterprise - 20 November 2024

👤 **Commissioned by:** Menlo Ventures

📋 **Total surveyed:** 600 US IT decision makers

⚙️ **Method:** Looking exclusively at US decision-makers in IT at enterprises with 50 or more employees.

🎯 **Focus and Responses:** The survey looks at year-on-year spending on GenAI, identifying where new spending is reaping the rewards. With an IT firm focus, the survey identifies the most beneficial use-cases: code copilots, website chatbots, meeting summarisation, etc. The survey also used data to construct a 'stack' following the use of AI in vertical chains. The survey ends by making some informed predictions on the future of GenAI in enterprise.

🔗 **Link:** https://menlovc.com/2024-the-state-of-generative-ai-in-the-enterprise
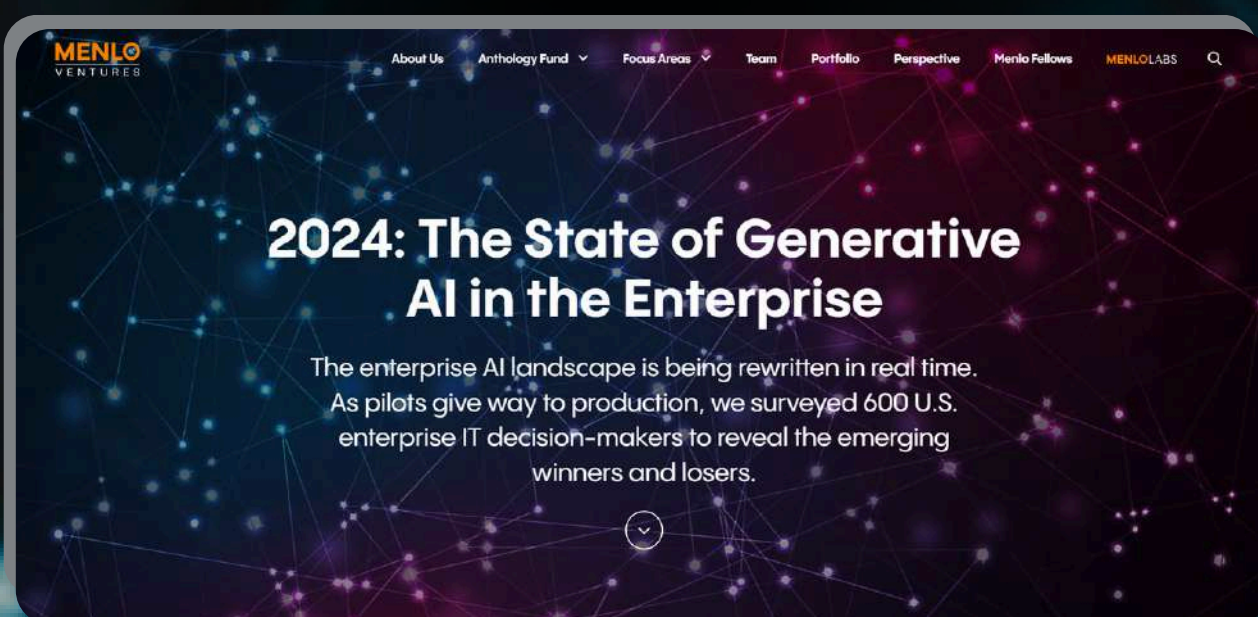
14. Deloitte's State of Generative AI in the Enterprise Q3 Report - August 2024

👤 **Commissioned by:** Deloitte and Deloitte AI Institute

📋 **Total surveyed:** 2,770 senior leaders, C-suite, and board members

⚙️ **Method:** Respondents from fourteen countries (incl. UK) and organisations with one or more working implementations of AI being used daily. Respondents were all required to have some input over decisions affecting their organisation's AI technology implementation.

🎯 **Focus and Responses:** Focus remained on areas of success for firms implementing GenAI solutions. The second finding from the survey assessed how firms scaled GenAI. It found that the majority of firms had deployed less than a third of their experimentation into production. Firms were also asked about their data strategies and capabilities, and how they were mitigating risks. The survey finished with some tips for looking ahead on GenAI.

🔗 **Link:**
https://www2.deloitte.com/content/dam/Deloitte/us/Documents/consulting/us-state-of-gen-ai-q3.pdf

Deloitte.

Now decides next:
Moving from potential to performance

Deloitte's State of Generative AI in the Enterprise
Quarter three report

August 2024

deloitte.com/us/state-of-generative-ai

15. Evolving Together: Flourishing in the AI workforce - 18th September 2024

👤 **Commissioned by: bsi and Yonder**

📋 **Total surveyed:** 932 'business leaders' in nine countries

🔧💡 **Method:** Answers are split by country and then sector in a comparative approach. UK data is separate and contrasts with business attitudes in the US, China, India, etc.

🎯 **Focus and Responses:** Many focuses, first questions ask about AI's impact on manual labour and where GenAI is expected to make savings within firms (operations, marketing, sales, etc.). 83% of leaders globally said they expect some manual roles to change, and 72% expect some manual roles to be replaced, a figure that rises to 76% in retail and transport. The figures are similar but marginally higher for knowledge-based roles, with 89% expecting some roles to change and 77% expecting some to be replaced by AI. Use of GenAI in businesses was also measured along with attitudes towards training, risks, and trust. Survey ends with takeaways for business leaders regarding job design, training, trust, and performance management.

🔗 **Link:**
https://www.bsigroup.com/siteassets/pdf/en/insights-and-media/insights/white-papers/flourishing-in-the-ai-workforce.pdf

bsi Your partner in progress

Evolving together

Flourishing in the AI workforce
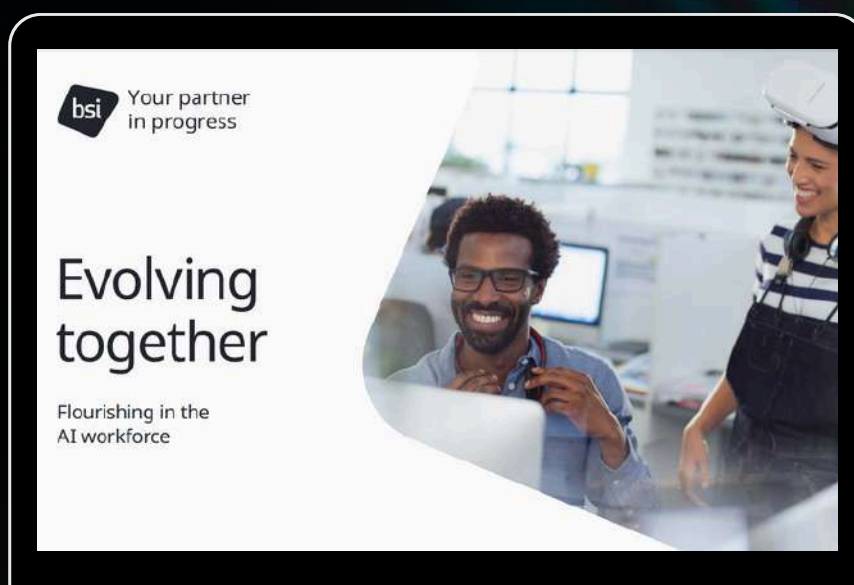
DOMAIN-SPECIFIC SURVEYS

16. Use of artificial intelligence in government -
15th March 2024

👤 **Commissioned by:** UK National Audit Office (NAO)

📋 **Total surveyed:** A mix of interviews with government representatives and a survey of 89 government bodies, including the main ministerial and non-ministerial departments and 52 arm's-length bodies.

🖥️ **Method:** Mix methods to examine interview notes and analyse survey data.

🎯 **Focus and Responses:** The study considers how effectively the government is setting itself up to maximise the opportunities and mitigate the risks of artificial intelligence (AI) in the provision of public services. A survey of government bodies found that AI was not yet widely used across government, but 70% of respondents were piloting and planning AI use cases.

🔗 **Link:**
https://www.nao.org.uk/
reports/use-of-artificial-
intelligence-in-
government

17. The Impact of Generative AI on Software Developer Performance - Q4 2024

👤 **Commissioned by: BlueOptima**

📋 **Total surveyed:** 20,548 software developers with and without licensed GenAI tools

🧩 **Method:** Data from over 200,000 software narrowed to 20,548 active users split into group that uses GenAI tools and control group without licenses.

🎯 **Focus and Responses:** How does access to GenAI tools affect software development? Does it bring marked gains in productivity? Are GenAI tools (or proficiency in their use) advanced enough to contribute to code without requiring significant human reworking? Survey found 4% increase in productivity among GenAI users.

🔗 **Link:**
https://www.blueoptima.com/resource/llm-paper-1

REPORT

The Impact of Generative AI
on Software Developer Performance

18. Artificial intelligence in UK financial services 2024 - 21st November 2024

👤 **Commissioned by:** The Bank of England and Financial Conduct Authority

📋 **Total surveyed:** 118 UK firms

⚙️ **Method:** Respondents ranged from UK banks, insurance, international banks, investment/capital markets, non-bank lenders, and financial market infrastructure.

🎯 **Focus and Responses:** Use and adoption: 75% of firms already use AI with more planning to join them. Growth identified in the use of third-party implementations of AI (from 17% in 2022 to 33% in 2024). Benefits, risks, and constraints formed the largest section of the survey. Greatest benefits found in cybersecurity, anti-money laundering, and data insights while greatest risk all linked to data (protection, bias, quality, security). Largest constraint is greater regulation.

🔗 **Link:** https://www.bankofengland.co.uk/report/2024/artificial-intelligence-in-uk-financial-services-2024

19. AI and climate action: how UK firms are responding - Autumn 2024

👤 **Commissioned by:** LSE and the Confederation of British Industry (CBI)

📋 **Total surveyed:** 400 UK firms

⚙️ **Method:** Unclear

🎯 **Focus and Responses:** Survey asked two-pronged questions about the adoption of AI and the wider adoption of digital technologies in response to shocks (covid, energy prices, climate change). It asks specifically about how investment was affected by Russia's invasion of Ukraine, considerations affecting the adoption of AI, the expected impact of AI, and the impact of economic shocks on sustainability actions.

🔗 **Link:**
https://cep.lse.ac.uk/pubs/
download/cp686.pdf

20. AI and the Future of News: What does the public in six countries think of generative AI in news? - May 2024

👤 **Commissioned by:** YouGov on behalf of the Reuters Institute for the Study of Journalism (RISJ) at the University of Oxford

📋 **Total surveyed:** Sample sizes are approximately 2,000 in each country (Argentina, Denmark, France, Japan, the UK, and the USA)

🗂️ **Method:** Data were collected by YouGov using an online questionnaire fielded between 28 March and 30 April 2024 in six countries: Argentina, Denmark, France, Japan, the UK, and the USA.

🎯 **Focus and Responses:** A sizable minority of the public – between 20% and 30% of the online population in the six countries surveyed – have not heard of any of the most popular AI tools. Roughly equal proportions across six countries say that they have used generative AI for getting information (24%) as creating various kinds of media, including text but also audio, code, images, and video (28%).of Ukraine, considerations affecting the adoption of AI, the expected impact of AI, and the impact of economic shocks on sustainability actions.

🔗 **Link:**
https://cep.lse.ac.uk/pubs/download/cp686.pdf
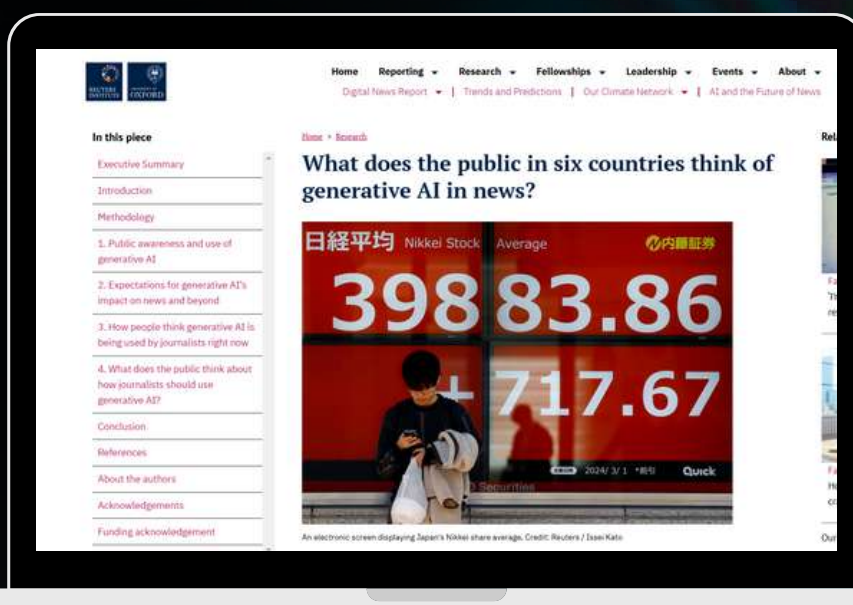
21. AI in Software Development 2024 Survey – 20th August 2024

👤 **Commissioned by:** Github

📋 **Total surveyed:** 2000 software developers

🧠 **Method:** Software development teams at enterprises in the U.S., Brazil, India, and Germany about the use, experience, and expectations around generative AI tools in software development.

🎯 **Focus and Responses:** Almost 97% reported using AI tools both in and outside of work. A strong majority (59-88%) of respondents across all markets reported that their companies are either "actively encouraging" or "allowing" the use of AI tools. Reported benefits include more secure software, improved code quality, better test case generation, and faster programming language adoption.

🔗 **Link:** https://github.blog/news-insights/research/survey-ai-wave-grows

Survey: The AI wave continues to grow on software development teams

We surveyed 2,000 people on software development teams at enterprises in the U.S., Brazil, India, and Germany about the use, experience, and expectations around generative AI tools in software development.

55%

30%

AI in software development
2024 survey

22. EY 2024 Financial Services AI Survey – December 2024

👤 **Commissioned by: EY**

📋 **Total surveyed:** UK financial services executives at 20 UK firms representing an aggregate market cap of almost £200bn.

⚙️ **Method:** In October 2024, EY conducted two surveys to assess the impact of AI and generative AI on the financial services industry. The UK survey polled 20 firms with a combined market cap of nearly £200 billion, while the European survey included 106 firms with a combined market cap of almost €880 billion. Both surveys sought insights from financial services executives on potential impacts in areas such as productivity, talent, and risk management.

🎯 **Focus and Responses:** A majority (91%) of UK firms surveyed have adopted AI into operations to some degree, but most remain in the early stages and 5% have not integrated AI at all. 82% of leaders plan to increase annual investment related to GenAI specifically. Only 9% of leaders say their firm is prepared for incoming regulation and 14% do not have an AI regulatory risk framework in place. Just 27% of firms have established GenAI training programmes, despite the majority (77%) of leaders believing their workforce does not have strong capabilities to implement GenAI applications.

🔗 **Link:** https://www.ey.com/en_uk/newsroom/2024/12/ey-european-financial-services-ai-survey

23. Make UK and Autodesk Survey of UK Manufacturing – 25th November 2024

Commissioned by: **Make UK and Autodesk**

Total surveyed: 151 UK manufacturing companies

Method: They surveyed 151 manufacturers between July and August 2024. In addition, they spoke to numerous manufacturers to test findings.

Focus and Responses: According to the survey, only 16% of manufacturers consider themselves knowledgeable about AI, with just 7% describing their expertise as "very knowledgeable." Despite this, 75% of manufacturers intend to increase AI spending within the next year. Only a third of manufacturers actively deploy AI tools within production processes, with many limited to experimental or supplementary applications. For instance, 44% of businesses use AI for production line automation, while 43% apply it for predictive maintenance. Fewer companies (37%) use AI to integrate new technologies with legacy machinery or connect systems across multiple sites. Barriers to AI adoption are substantial. The most cited challenges include systems integration issues (44%), high costs (44%), and technical complexity (39%). Cybersecurity concerns (35%) and a lack of skilled personnel add to these difficulties.

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