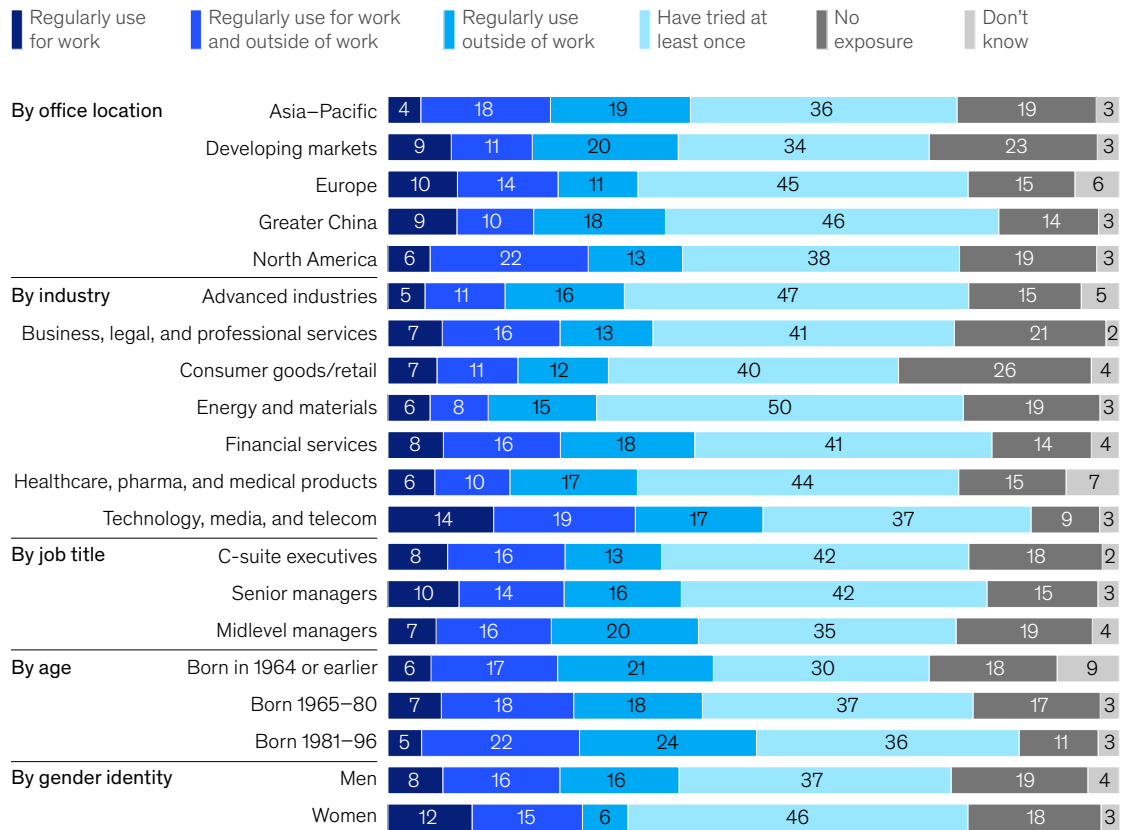


Respondents across regions, industries, and seniority levels say they are already using generative AI tools.

Reported exposure to generative AI tools, % of respondents



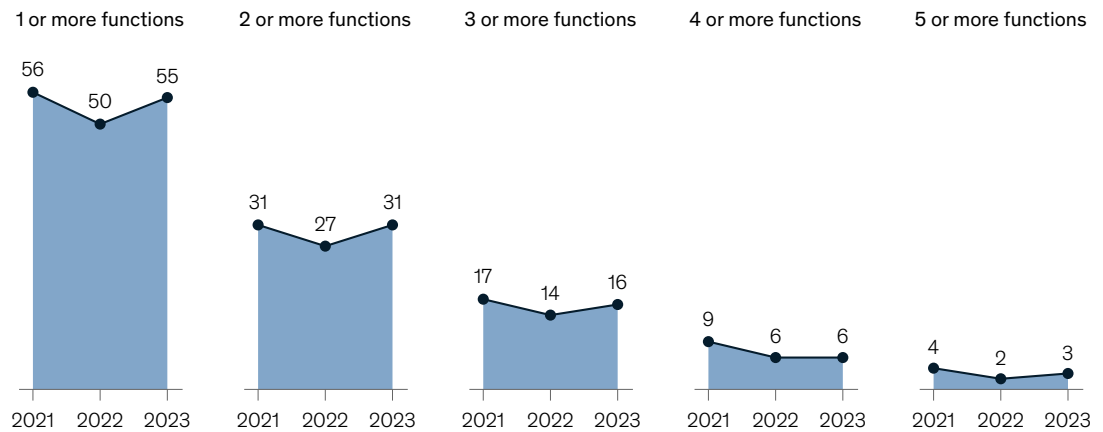
Note: Figures may not sum to 100%, because of rounding. In Asia-Pacific, n = 164; in Europe, n = 515; in North America, n = 392; in Greater China (includes Hong Kong and Taiwan), n = 337; and in developing markets (includes India, Latin America, and Middle East and North Africa), n = 276. For advanced industries (includes automotive and assembly, aerospace and defense, advanced electronics, and semiconductors), n = 96; for business, legal, and professional services, n = 215; for consumer goods and retail, n = 128; for energy and materials, n = 96; for financial services, n = 248; for healthcare, pharma, and medical products, n = 130; and for technology, media, and telecom, n = 244. For C-suite respondents, n = 541; for senior managers, n = 437; and for middle managers, n = 339. For respondents born in 1964 or earlier, n = 143; for respondents born between 1965 and 1980, n = 268; and for respondents born between 1981 and 1996, n = 80. Age details were not available for all respondents. For respondents identifying as men, n = 1,025; for respondents identifying as women, n = 156. The survey sample also included respondents who identified as "nonbinary" or "other" but not a large enough number to be statistically meaningful. Source: McKinsey Global Survey on AI, 1,684 participants at all levels of the organization, April 11–21, 2023

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Organizations, too, are now commonly using gen AI. One-third of all respondents say their organizations are already regularly using generative AI in at least one function—meaning that 60 percent of organizations with reported AI adoption are using gen AI. What's more, 40 percent of those reporting AI adoption at their organizations say their companies expect to invest more in AI overall thanks to generative AI, and 28 percent say generative AI use is already on their board's agenda. The most commonly reported business functions using these newer tools are the same as those in which AI use is most common overall: marketing and sales, product and service development, and service operations, such as customer care and back-office support. This suggests that organizations are pursuing these new tools where the most value is. In our previous research, these three areas, along with software engineering, showed the potential to deliver about 75 percent of the total annual value from generative AI use cases.

Less than one-third of respondents say their organizations use AI in more than one function—a share largely unchanged since 2021.

Number of business functions at respondents' organizations that have adopted AI, % of respondents¹



¹In 2021, n = 1,843; in 2022, n = 1,492; in 2023, n = 1,684.

Source: McKinsey Global Survey on AI, 1,684 participants at all levels of the organization, April 11–21, 2023

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More than two-thirds of respondents expect their organizations to increase their AI investment over the next three years.