

REPORT



The State of Generative AI ADOPTION

The Current Landscape and
Lessons from Early Adopters





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Generative AI – From Hype to Business Impact



Pascal Bornet

Pascal Bornet is an award-winning expert, author, keynote speaker, and influencer in Artificial Intelligence (AI). Bornet, with 20+ years of executive experience at McKinsey and EY, regularly ranks as one of the top 10 global AI experts. He's a tech influencer with over a million social media followers.

Generative AI has surged onto the global stage, disrupting traditional business practices and models. As leaders, innovators, and analysts, we are engaged in a race to effectively harness and apply generative AI tools. While we marvel at the capabilities of tools like ChatGPT and Google Bard, which produce lifelike content, it is now crucial for businesses to shift their focus towards achieving measurable returns on investment.

Drawing from my extensive experience collaborating with global corporate clients, it is clear that generative AI currently finds itself in the 'Hype' phase—a natural stage for emerging technologies. The real challenge lies in how businesses can adapt, scale, and ethically deploy these tools to realize tangible outcomes. As I have emphasized over time, businesses investing in Gen AI should expect substantial and measurable results.

So, where should they embark on this journey?

Based on my experience, corroborated by the research conducted by LTIMindtree, two key areas are critical for transitioning generative AI from hype to lasting impact: a well-defined strategy to enable scale and a responsible approach to ensure the sustainability of the transformation.

Firstly, business leaders must craft a **well-defined strategy for scaling generative AI** deployment to yield enduring, high-impact results. Isolated pilot programs will not suffice; what's needed is a strategic approach that encompasses platformization, industry-specific training, and an unwavering commitment to ethics, aligning with the demands of our times.

I have led numerous AI projects globally, and my experience underscores the importance of having a clear AI strategy aligned with business objectives. This begins with identifying high-impact use cases, ensuring that AI initiatives are purposeful and value-driven.

My experience and this research affirm that the accuracy and effectiveness of generative AI solutions hinge on the quality, diversity, and relevance of the underlying data used to train AI models. Hence, developing and fine-tuning narrow, industry-specific Language Models (LLMs) are crucial. These models, enriched with industry-specific knowledge, enhance content generation and task performance. For instance, a 'law' domain-specific model undergoes specialized training encompassing terminology, legal texts, cases, and specific terminology. Once fine-tuned, these industry-specific models excel in generating content, answering questions, or performing tasks tailored to their respective industries.

Businesses must also embrace a 'platformization strategy' to ensure robust and rapid scalability. Based on my experience, neglecting this aspect may hinder the development of the robust and scalable technology infrastructure necessary for successful AI deployment.

Secondly, this study is a timely reminder that our technological aspirations must never outpace **our commitment to responsible and ethical practices**. Businesses need to proactively manage the limitations and risks associated with generative AI. As the potential of this transformative technology grows, so does our responsibility to use it ethically and securely. My observations have shown how AI can bring remarkable benefits to humanity, but groundbreaking technology demands even greater responsibility. As we strive for technological advancement, businesses must handle data reliably, ethically, and securely, keeping a firm foothold on ethical and practical grounds.

Leaders must engage in 'Mindful AI' practices, educating themselves and their stakeholders about the risks when designing AI solutions. When AI is employed, team members should have a say in shaping AI development. Businesses must prioritize human values in their endeavors, empowering team members to voice concerns and advocate against AI usage if necessary.

How can businesses implement Mindful AI?

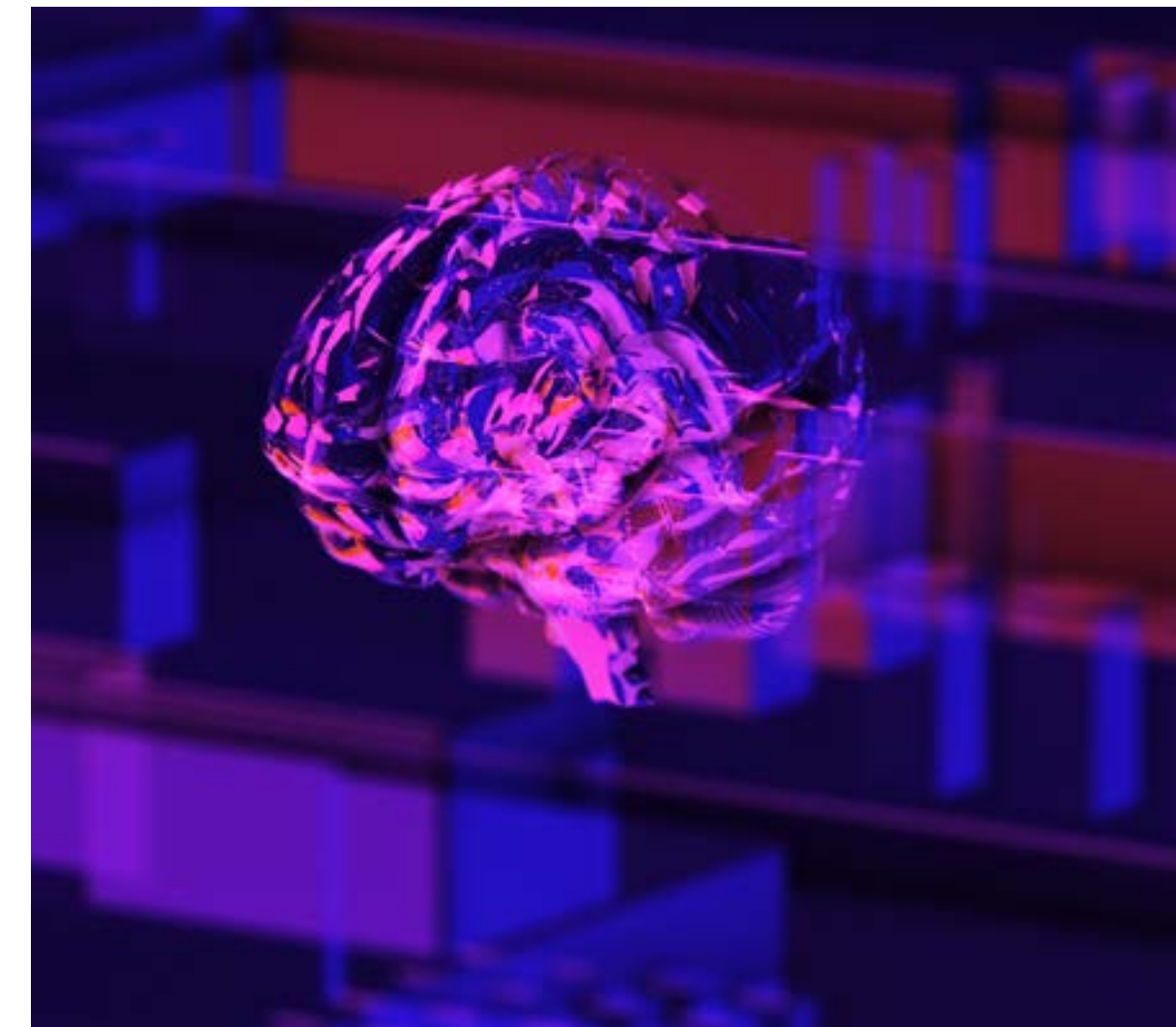
Businesses must routinely audit and update their AI systems to ensure adherence to the highest ethical standards. Strict data privacy and security standards must be upheld, and models should be scrutinized to prevent the perpetuation of harmful biases. Additionally, robust cybersecurity measures should be implemented, and businesses should comply with relevant data protection regulations to safeguard sensitive information.

Lastly, having acquired the necessary talent and expertise in AI, machine learning, and domain-specific knowledge, skilled resources should prioritize transparent and explainable AI models. The next generation of workers entering the workforce will be AI natives. It is crucial to ensure that AI natives and stakeholders understand how AI makes decisions, fostering trust in AI and enabling better risk management practices associated with responsible AI.

The transformation brought about by generative AI transcends the mere adoption of a new technology. It involves reshaping business strategies, prioritizing ethical considerations, and continuously aligning with evolving societal needs. This report distills the essential strategy for businesses to successfully navigate the generative era. Whether businesses are on the cusp of this AI revolution or deeply immersed in their AI journey, this work serves as both a guiding light

and a cautionary tale. It encourages innovation with a sense of purpose and responsibility. It is essential reading for anyone committed to making a meaningful impact in our generative AI-fueled future.

Pascal Bornet



Preparing for a New Breed of Customers: The Gen AI Natives

The ability to predict the future is central to society. Today, we try to predict everything, from the outcome of the ball game this evening to the weather tomorrow morning, from the state of the stock market this month to the likely value of our investments next year and the possibility of a pandemic in the next decade. The availability of data and statistical models has made this possible. But we are now poised at a radical moment in the history of civilizations: for the first time, we have generative AI (Gen AI), a technology that is as smart as us, if not more. This technology will do for creativity what statistical models did for data.

The World Economic Forum captured the coming change with remarkable exactness: “Until just a few months ago, AI was a mysterious and obscure technology for most of us. Millions of people are chatting with mesmerizingly powerful AI tools that use everyday language. Suddenly, the vast potential of generative AI is dawning on us.”¹ Recently, when the results of an LTIMindtree study called The State of Generative AI Adoption came in, it set me thinking: The children of Millennials—let’s call these youngsters ‘Gen AI Natives’—weaned on Multi-modal Large Language Models (MLLM) and algorithmic dopamine will be different. But how different will they be, and what will businesses do to address this new generation of customers?

Before exploring the answer, let’s understand that Digital Natives,² in direct contrast to Analog Natives before them, grew up with technologies like the Internet and the mobile phone. The primary life experience of Digital Natives for everything, from shopping, entertainment, playing, and banking to studying, finding a partner, and giving job interviews, has been online. When they say, “Let’s meet,” they mean on Teams, Google Meet, Zoom or Slack.

In the early 2000s, a friend said he would admit his Millennial children to a school where using the mobile phone was a formally taught life skill. I assumed he was joking. Now, I think back on that remark and am convinced he meant it seriously. Whatever the case, today, parents and teachers must help children with Gen AI. As it turns out, in the wake of the “wildly popular AI chatbot ChatGPT,” the MIT Technology Review has thoughtful advice for parents. It offers six tips on how to give your children an AI education in the times of Gen AI. The first is to remember that AI is “not a friend,” and the last is “not to miss out on what AI is actually good at!”³

Clearly, Gen AI Natives (born in 2017, the year Google introduced the first transformer⁴ and after) will be a step ahead. They are growing up with super-intelligent technology that will enable a profound shift in their thinking. One good way to sense the nature

of the change is to understand that technology, until now, has been used to improve productivity, efficiency, accuracy, convenience, and compliance. For the first time, with Gen AI, we have tools that aid and improve creativity. So, the expectations of this generation, their work ethics, and social behavior will be radically different.

Sudhir Chaturvedi

Whole-Time Director & President,
LTIMindtree



Generation Alpha or Gen AI Natives?

There are minor differences in terminology around Gen AI Natives. Some organizations may prefer to use Generation Alpha – as is the case with the Institute of Electrical and Electronics Engineers (IEEE). Interestingly, the IEEE has determined that the children of Millennials, born after 2010 – the year iPads were launched – comprise Generation Alpha. See <https://transmitter.ieee.org/ai-2017/> for more on how the IEEE thinks AI will impact the coming generation, from infancy to retirement.

While CEOs rush to add Gen AI into the upskilling syllabus of their workforce, product designers, marketers, and human resource specialists must align themselves with the experience curve this new generation expects. Our study of early adopters shows that almost three-quarters of leaders are upskilling staff for future use of Gen AI. They see Gen AI as the perfect way to personalize and refine products and experiences, but our study shows that content and creativity are low priorities. Only two in five companies have reported content generation as the key reason for adopting Gen AI. This is as it should be. The technology is new. Investing in it to pursue the primary business goals –income and profitability—is a ground reality. Our study reflects this, showing that 33% of leaders see Gen AI increase revenue by 20% or more.

But organizations should note what looms over the horizon. One of the most hotly debated concerns is AI hallucination. Gen AI models with their LLMs often tend to make up answers that sound convincingly factual. This is because the training data for these models, primarily acquired off the Internet, is unreliable. In addition, training the models is expensive. Therefore, these models must live with the reality of data cut-off—meaning the LLM will remain unaware of anything beyond the training. Techniques to neutralize the hallucinations and bridge the gaps are being developed, but it will be some time before streaming real-time input becomes financially viable.

Aside from misleading “hallucinatory content,” Gen AI enables the creation of deep fakes. This will make Gen AI Natives cautious of the technology. They will live in a world where the quality of content used to personalize experiences and shape their behavior will always be suspect.

The question, “Can I trust my provider?” will always haunt them. So, organizations adopting Gen AI will do well to remember that the coming generation will highly prize ethical processes, transparency, and regulatory compliance. Taking a proactive approach by embedding ethical practices and transparency into processes touched by Gen AI will soon separate the leaders from the laggards.

Sudhir Chaturvedi

¹ *The golden age of AI: Why ChatGPT is just the start*, World Economic Forum, March 24, 2023: <https://www.weforum.org/agenda/2023/03/generative-ai-chatgpt-machinelearning/>

² *The Millennial Generation, born 1977-1995*

³ *You need to talk to your kid about AI. Here are 6 things you should say*, Rhiannon Williams and Melissa Heikkilä, MIT Technology Review, September 5, 2023: <https://www.technologyreview.com/2023/09/05/1079009/you-need-to-talk-to-your-kid-about-ai-here-are-6-things-you-should-say/>

⁴ *Transformer: A Novel Neural Network Architecture for Language Understanding*, Jakob Uszkoreit, Google Research, August 31, 2017: <https://blog.research.google/2017/08/transformer-novel-neural-network.html>

Reimagining Business Processes and Interactions with Gen AI

Generative AI is rapidly changing how we engage with the internet, our applications and each other. Businesses are now in a frantic race to move beyond using AI for routine problem-solving. They want to use Gen AI to reimagine their processes and interactions, and power business performance. Gen AI is a silver bullet that everyone will eventually bite, but, for the moment, it raises more questions than it answers.

The emerging risk we see lies in treating Gen AI like a shiny new toy rather than making it central to transformation and business preservation. More danger lurks when businesses are slow to shape a Gen AI roadmap aligned with their goals. There is no time available for vacillation.

Should Gen AI be used to improve customer experience? Enhance product design? Improve data summarization? Enhance analytics? Or create new business opportunities? Should it be used to improve operational efficiency? To help answer these and other confounding questions, we turned to organisations across the world who are showing us how to harness Gen AI successfully. Our survey is uniquely illuminating because it examines what is happening on the

ground. And (spoiler alert), our study shows that a third of leaders (33%) report that Gen AI increases revenue by 20% or more.

We must pay attention to what these organizations are doing because Gen AI has become essential to transforming every part of society, business and governance. This is only the start of a trend that promises to leave an immediate and lasting impact on four key business functions:

1. **Customer and employee interactions:** With the use of contextual and enterprise-aware AI systems (such as chatbots), interactions can become more sophisticated, personalised, and accurate while reducing response time. Gen AI can become an invaluable tool to enhance customer and employee experiences in an age of consumer impatience.
2. **Supply chains:** Gen AI can eliminate the manual and transactional work involved in managing supply chains. It can support supply chain professionals by providing analytics that reduces execution latency. The result is efficient and agile supply chains that excel at timely deliveries and avoid inventory backlog.



Nachiket Deshpande

Whole Time Director and COO,
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- 3. Data summarisation:** Gen AI can understand and summarise complex, unstructured data, helping businesses go beyond predictive analysis to achieve prescriptive analytics. Researchers may take upwards of US\$25 an hour to summarise documents – and could make errors – while Gen AI can do the same in seconds and at a fraction of the cost.
- 4. Content generation:** Gen AI is already disrupting the world of content creation. It creates advertising copy, produces social media content, designs packaging, generates videos, writes music (and poetry!) and translates without losing context. Its ability to create diverse, compelling and personalised content at scale can accelerate growth.

Researchers say Gen AI could add the equivalent of US\$2.6 trillion to US\$4.4 trillion annually, above what other AI and analytics can unlock across the 63 use cases they studied.¹ Given the pace at which the Gen AI technology is developing—OpenAI’s ChatGPT became the world’s fastest-growing consumer application in history with 100 million users in 2 months²—it is advisable to begin the adoption journey now.

Our study distils the Gen AI strategies of 450 leading decision-makers at businesses around the globe. It looks at who is adopting the technology, why it is being adopted, and the best ways to guarantee successful adoption. You can use this study to compare and challenge your strategic choices related to Gen AI, shape and evolve your thinking, and explore the value this technology can unlock.

If this study helps you make decisions around Gen AI with greater confidence, it will have served its purpose. I invite you to use it as a guide to the future of your business.

Nachiket Deshpande



¹ *The economic potential of generative AI: The next productivity frontier*, McKinsey Digital, June 14, 2023: <https://www.mckinsey.com/capabilities/mckinsey-digital/our-insights/the-economic-potential-of-generative-ai-the-next-productivity-frontier>

² *ChatGPT sets record for fastest-growing user base - analyst note*, Reuters, February 2, 2023: <https://www.reuters.com/technology/chatgpt-sets-record-fastest-growing-user-base-analyst-note-2023-02-01/>

Navigating the Generative AI Frontier — An Early Roadmap Emerges

What sets leaders in Gen AI apart?

In a world defined by relentless technological advancements, one innovation stands out as a transformative powerhouse: generative AI. It embodies a seismic shift that is indelibly shaping the contemporary business landscape. Our report, *The State of Generative AI Adoption: The Current Landscape and Lessons from Early Adopters* delves into one core question: what sets the leaders in generative AI apart, and how can others emulate their success?

Our survey was conducted in August 2023. Its findings reveal widespread experimentation with Gen AI tools, despite their relative novelty. Respondents not only embrace experimental use but also anticipate a profound transformation within their industries.¹ Globally, the United States leads in Gen AI adoption, surpassing UK and Continental Europe, while the Nordic regions fall behind.

Our report unveils a comprehensive roadmap for the Gen AI journey. This roadmap highlights five pivotal success factors: unwavering leadership, access to skilled personnel, effective training programs,

user-friendly AI technology, and effective communication and change management.

The data reveals that leaders and moderate adopters are keen to co-develop Gen AI solutions in close partnership with technology providers, with a resounding 52% of both groups choosing this path. However, for enterprises yet to embark on their Gen AI journey, formidable barriers loom large, including operational costs, challenges related to data quality and availability, and the need for precise identification of suitable use cases. A staggering 79% of leaders cite ethical, security, or regulatory issues as barriers to the successful adoption or scaling of Gen AI, while 78% identify a lack of suitable skills, expertise, or knowledge as their greatest challenge.

Early adopters share a common vision: harnessing Gen AI to elevate customer experience, drive revolutionary product design, and unlock the transformative capabilities of data analytics. Gen AI is proving to be a sound investment for these pioneers, delivering benefits such as improved operational efficiency, greater revenue, and streamlined costs.



¹ For the purposes of this roadmap, we will refer to those who state that they have extensively adopted Gen AI, across multiple functions of their business, or their entire organisation, as leaders.

Survey Unveils Blueprint for Shaping the Future

How Leaders Use Gen AI

Early or Extensive Adopters



Pre-Adopters' Intended Use



Top Use Cases in the US, UK and Continental Europe, and the Nordics



Improving **Customer Experience**

Investments in Gen AI

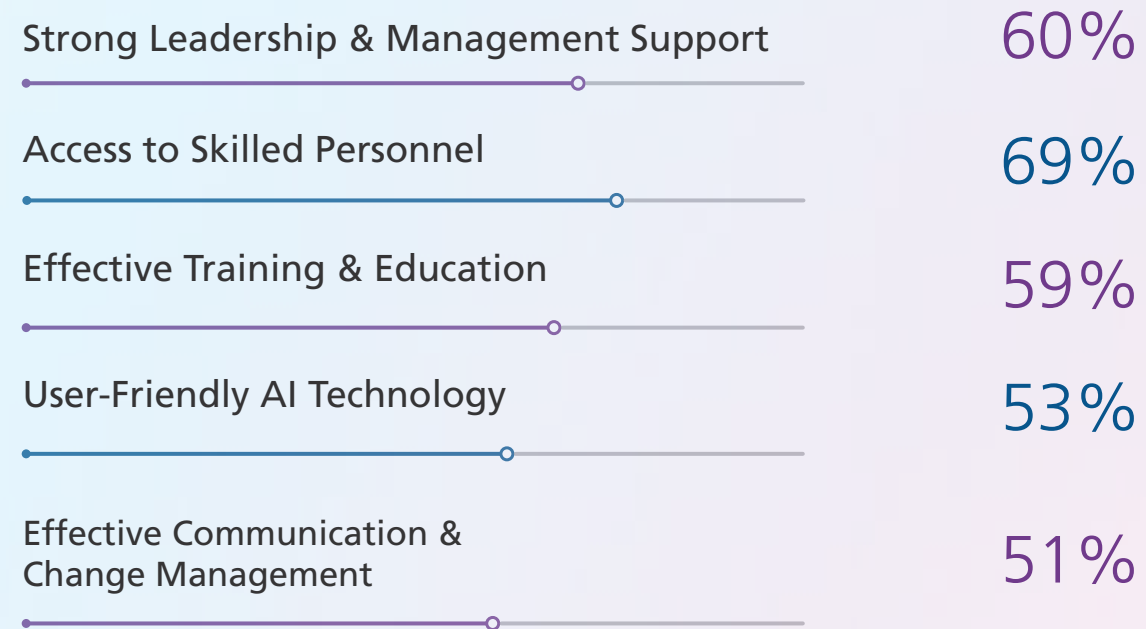
Pre-Adopters Invest in Research and Development

75%

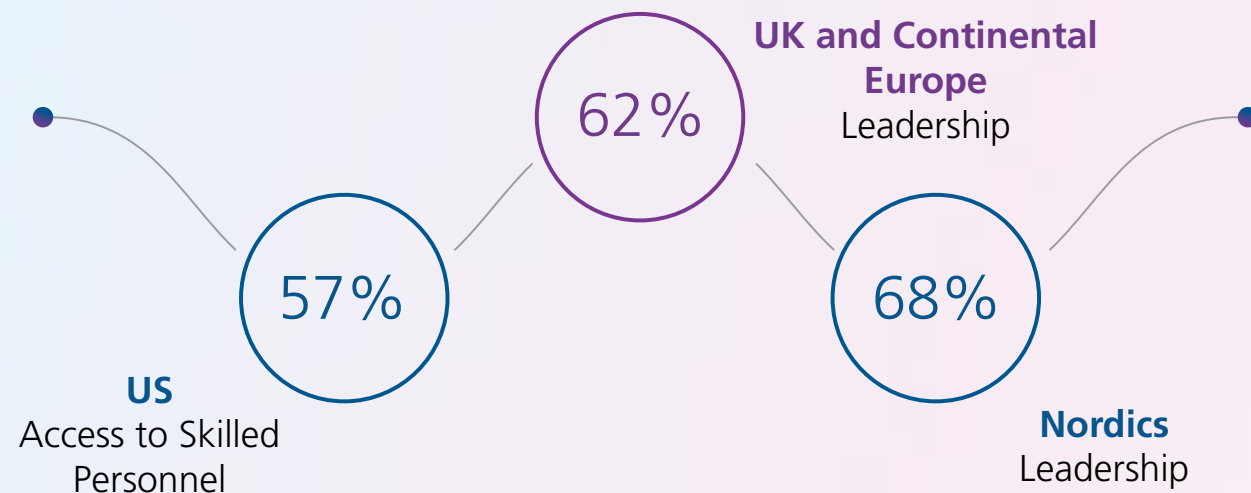
Early Adopters Explore New Use Cases

80%

Successful Gen AI Adoption: Key Factors

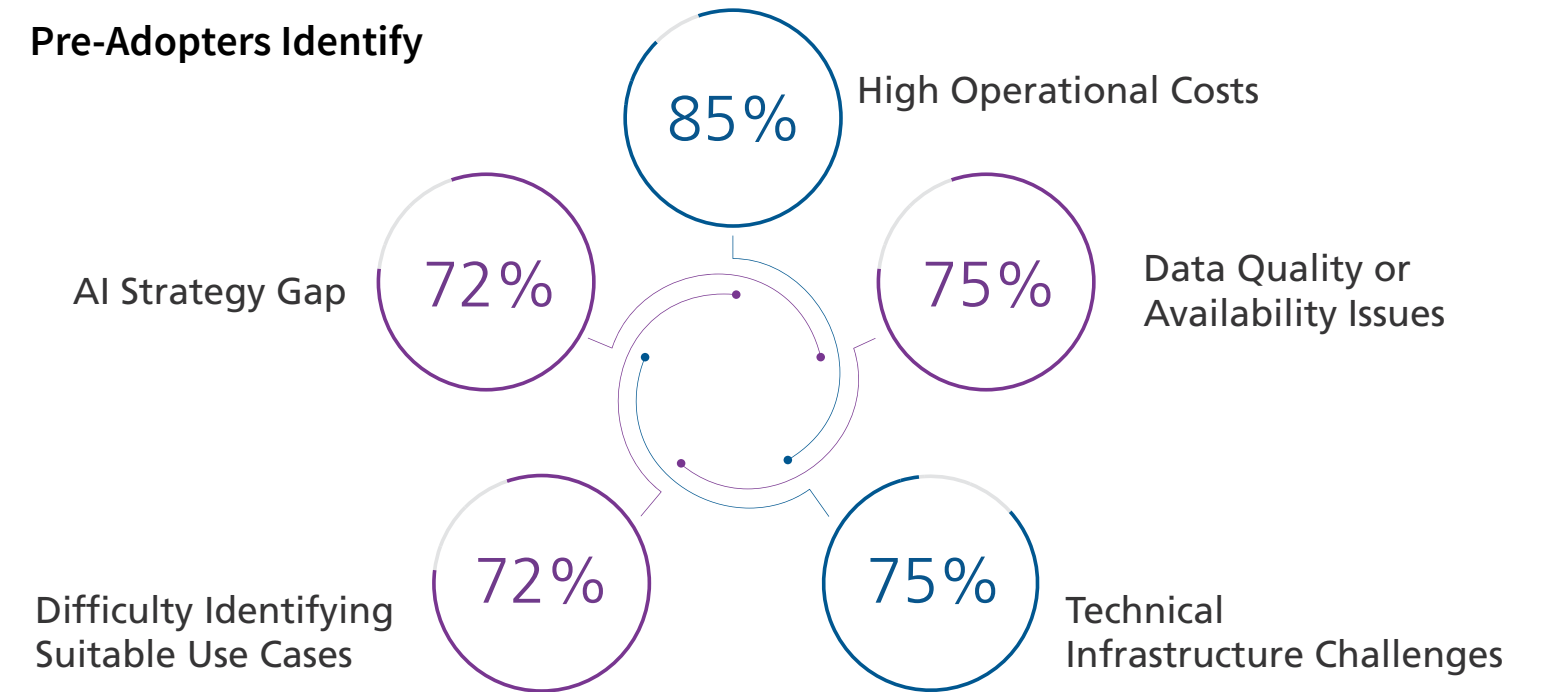


Critical Success Factors Across Regions



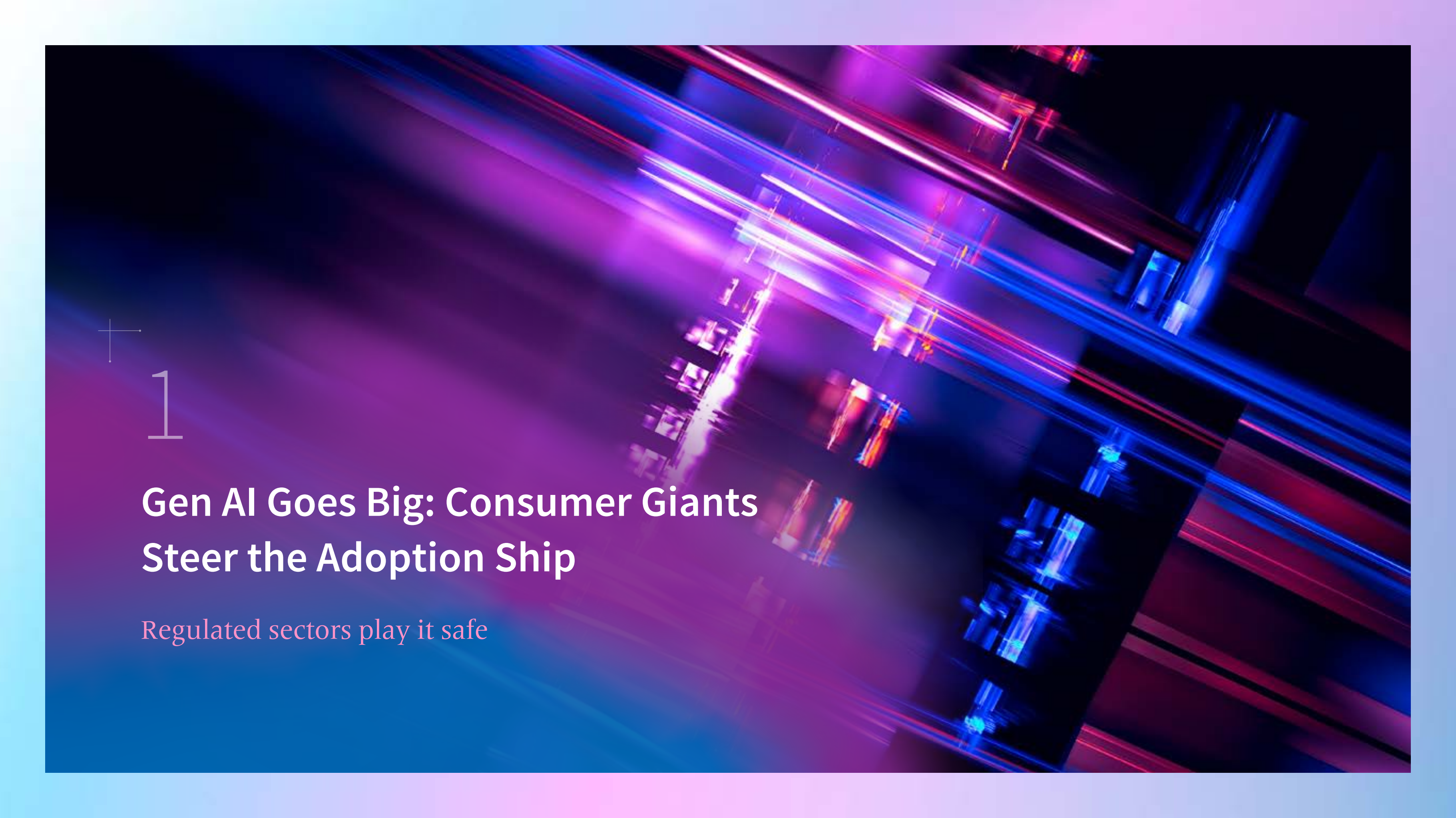
Barriers to Successful Gen AI Adoption

Pre-Adopters Identify



Critical Challenges Across Regions





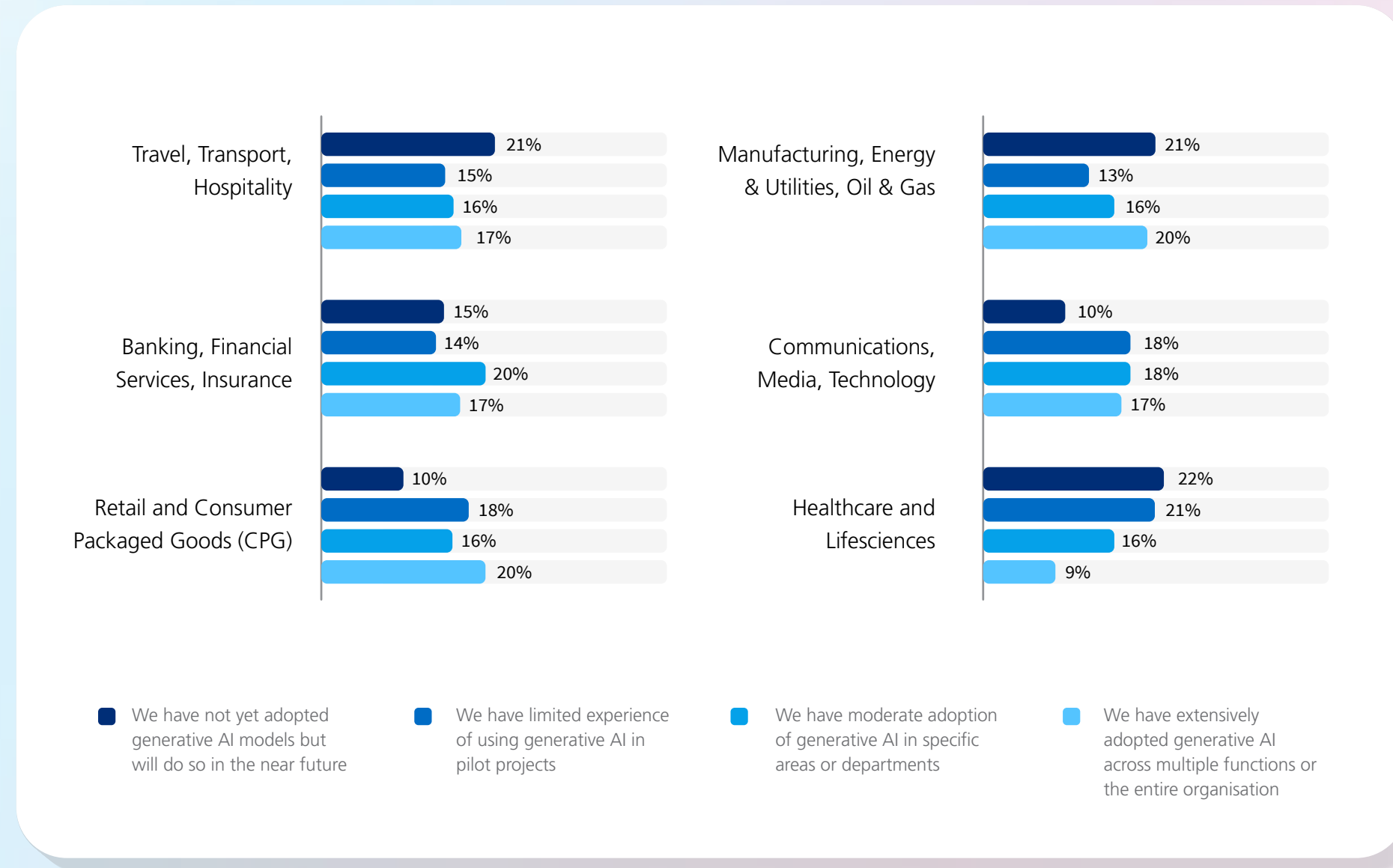
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Gen AI Goes Big: Consumer Giants Steer the Adoption Ship

Regulated sectors play it safe

Retail and manufacturing outpace banking & healthcare in Gen AI adoption



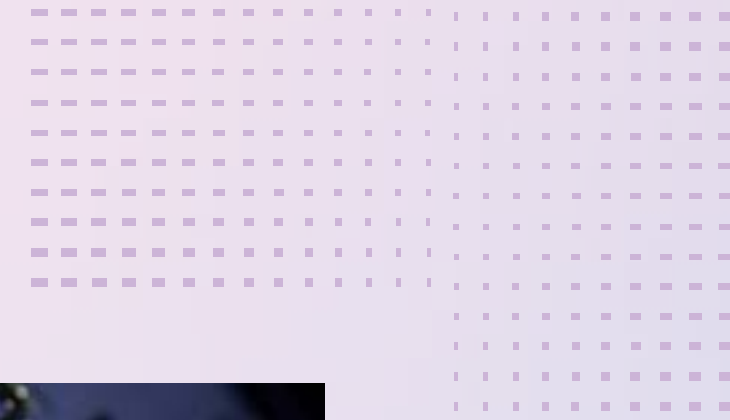
Q. In which sector does your organization operate?

- **Four in 10 leaders have an annual turnover of \$20 billion or more**

41% of those leading the charge in Gen AI adoption are large corporates, with an annual turnover exceeding \$20 billion. In contrast, businesses with an annual turnover of under \$1 billion are trailing in the race. Our survey shows that larger companies are exploring in-house solutions using API plug-ins and their own databases. One in five smaller and mid-tier businesses are choosing, instead, to collaborate with service providers to create cost-effective and tailored Gen AI solutions that meet their needs.

- **The US leads the way**

The United States currently surpasses UK and Continental Europe in Gen AI adoption, with 61% of Gen AI leaders based in the US compared to 39% in UK and Continental Europe. Only 10% of Gen AI leaders are found in the Nordic regions. The US holds a dominant position due to its thriving tech giants, such as Google and Microsoft, as well as a vibrant venture capital scene, centred in Silicon Valley. Europe, known for legislative frameworks such as the General Data Protection Regulation (GDPR), has a unique alternative perspective on Gen AI which emphasises ethics and privacy.




- **40% of early adopters are in retail and manufacturing**

Consumer-facing industries such as retail and manufacturing are at the forefront of Gen AI adoption, with 40% of Gen AI leaders operating in these sectors. These industries recognize the immense value of Gen AI in terms of personalisation, efficiency, and competitive advantage. The use of predictive analytics enables these businesses to anticipate consumer preferences, much like Spotify suggesting songs for individual playlists. The AI-driven evolution optimises operations and delivers the streamlined, personalised digital experiences that consumers.

- **Complex regulatory frameworks hinder adoption**

Only 9% of Gen AI leaders are found in the healthcare industry, despite its extensive use of advanced technologies such as big data, machine learning and AI. Regulatory barriers, concerns over the safeguarding of sensitive patient information, and the complexity of health data contribute to the cautious adoption of Gen AI in healthcare. Similarly, the banking and finance sector, another highly regulated industry, includes only 17% of Gen AI leaders.





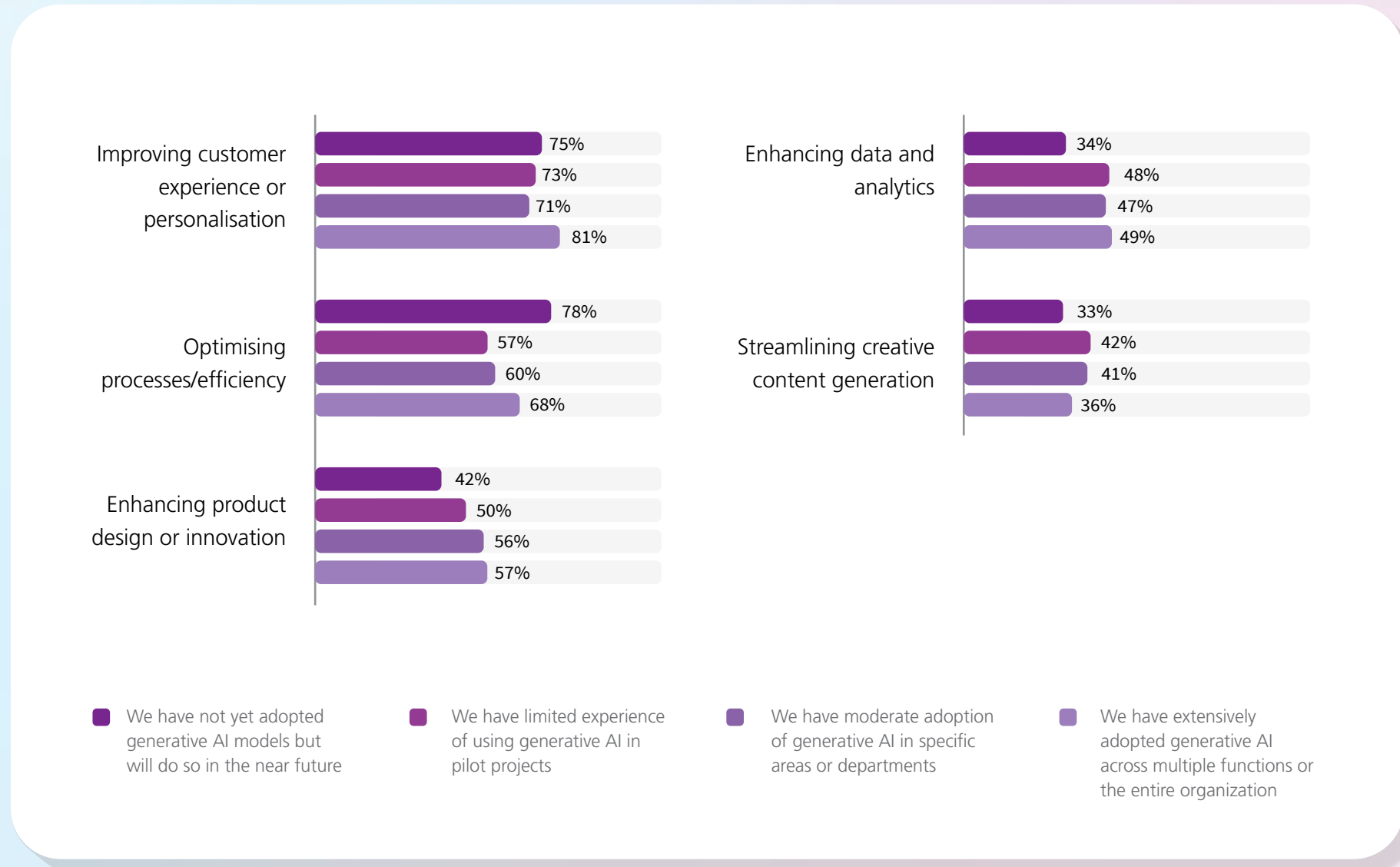
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Seamless Customer Experience Motivates 81% of Early Adopters

Process efficiency and product
innovation follow suit

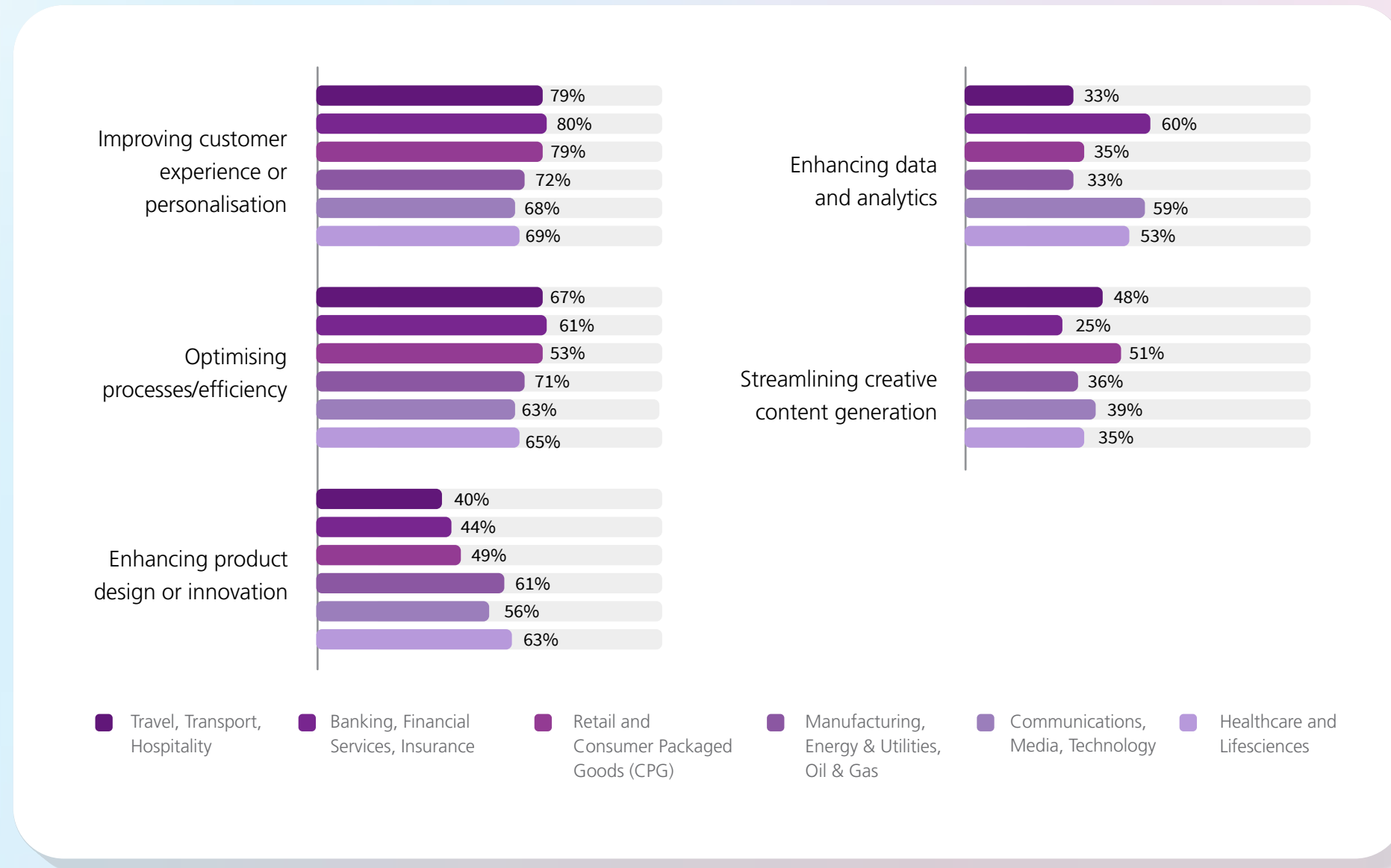
Leaders are primarily driven by enhancing customer experience in their adoption of Gen AI



Q. What specific business objectives or use cases are driving your organization's adoption or planned adoption of generative AI?



Manufacturers using Gen AI to enhance operational efficiency



69%

in healthcare see use cases in personalization

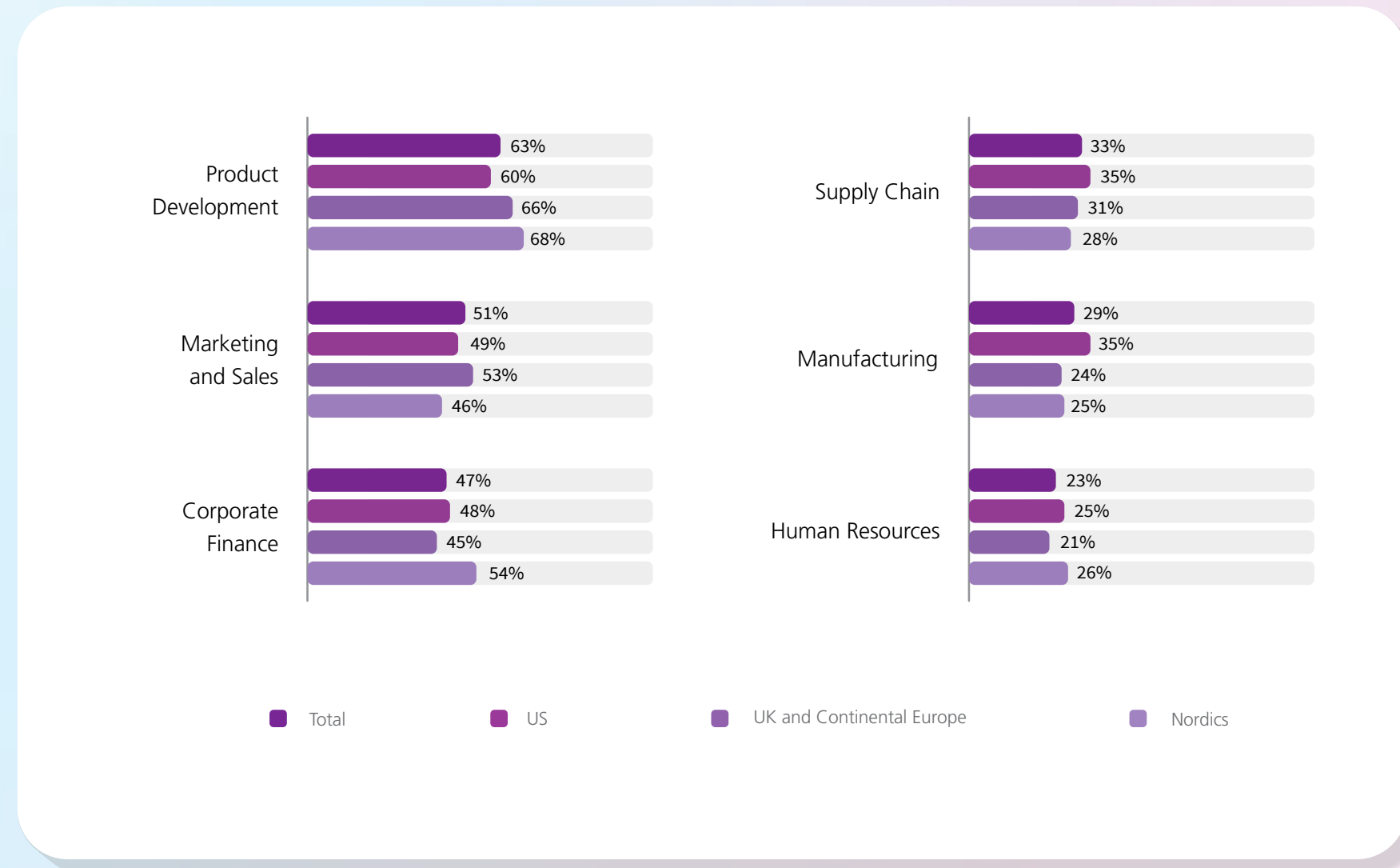
Across various industries, the primary driver for adopting Gen AI is the potential to enhance customer experience. Notably, the travel, banking, and retail sectors exhibit a heightened interest in this advantage. In the realm of travel, AI enables personalised recommendations and streamlined booking processes. In banking, it offers tailored financial advice, fraud detection and efficient online interfaces. Within the retail sector, AI elevates personalised shopping experiences, product recommendations and inventory management.

In manufacturing, there is significant interest in leveraging Gen AI to optimise processes and boost efficiency. This aligns with the industry's focus on maximising production, minimising waste and achieving smoother workflows. In healthcare and life sciences, Gen AI primarily serves to enhance product design and innovation. These industries aim to utilise this emerging technology to develop innovative medical equipment, pioneer new therapies and discover breakthrough drugs.

Q. What specific business objectives or use cases are driving your organisation's adoption or planned adoption of generative AI?

59% of leaders use Gen AI in product development

Businesses also want to use Gen AI in marketing and corporate finance



53%

businesses in UK and Continental Europe use Gen AI in marketing and sales

For leaders, the most popular reason to adopt Gen AI is to accelerate new product development (71% name this as their most important driver, and 59% see use cases in product development departments). The possibilities are tantalising: manufacturers and retailers could use the technology to design new products based on market demand, with instantaneous speed, or even tailor products to the immediate wishes of individual consumers. However, looking at the regional data, it's clear that while product development is seen as a key use for Gen AI across all regions, the US is currently more likely than other regions to use AI in manufacturing departments; UK and Continental Europe jumps ahead when it comes to marketing and sales, and the Nordic regions are ahead of the rest for Gen AI usage in corporate finance departments

Q. In which departments within your organization do you see use cases for generative AI adoption?



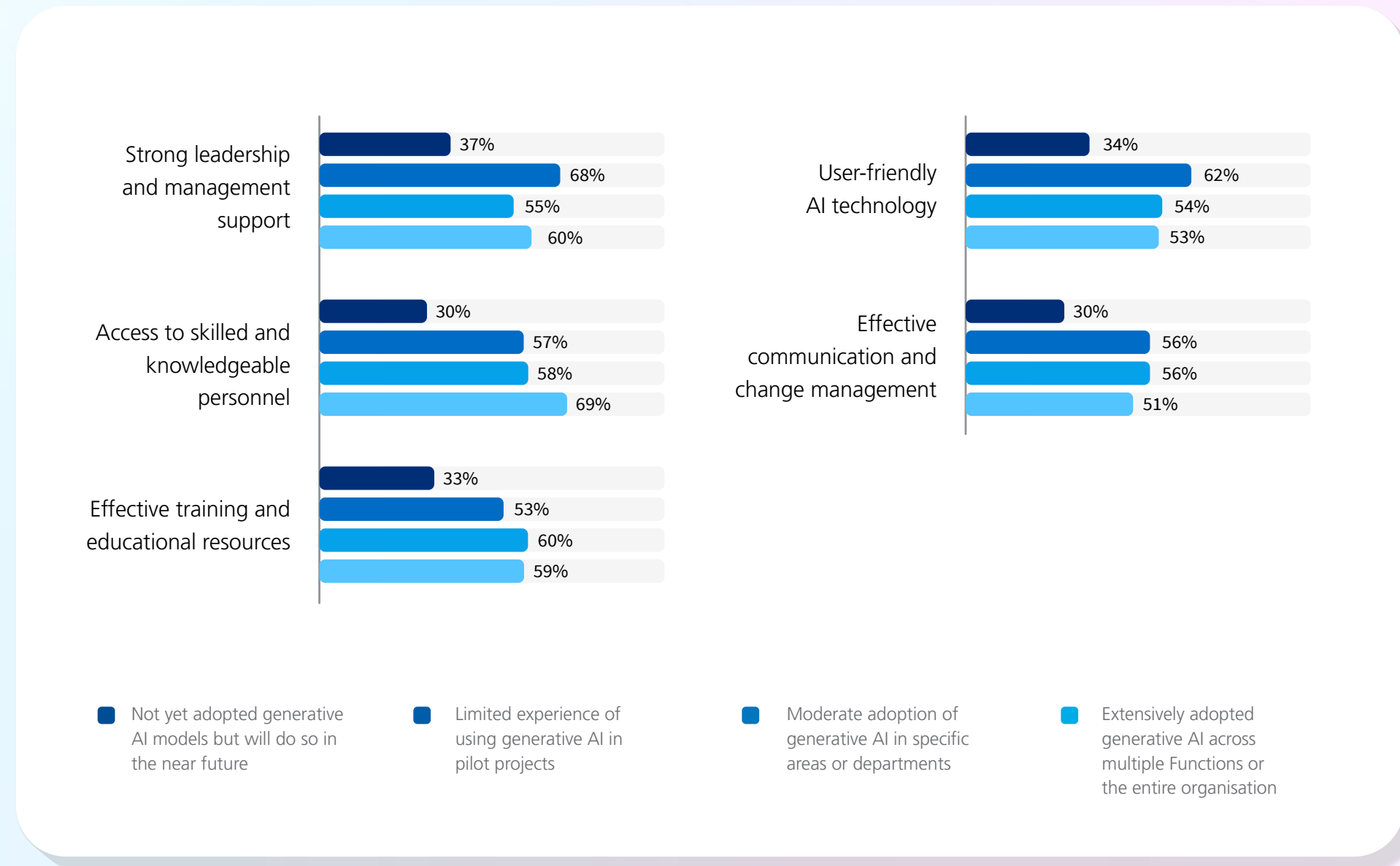
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3

Early Adopters Share the Roadmap

69% of leaders say skilled personnel play a key role in successful adoption

Key factors in successful Gen AI adoption



Q. Which of the following do you believe to be the key factors for successful adoption and implementation of generative AI in your organization?





Strong leadership and management support

Named by **60%** of leaders

Successful adopters say that if an organisation is to implement Gen AI effectively, the leadership team must be at the forefront of change. As a technology with a wealth of applications, Gen AI has the potential to fundamentally alter the way a business operates and expand the possibilities of what it can achieve. Change must come from the top, and a steady hand is needed on the wheel.



Access to skilled and knowledgeable personnel

Named by **69%** of leaders

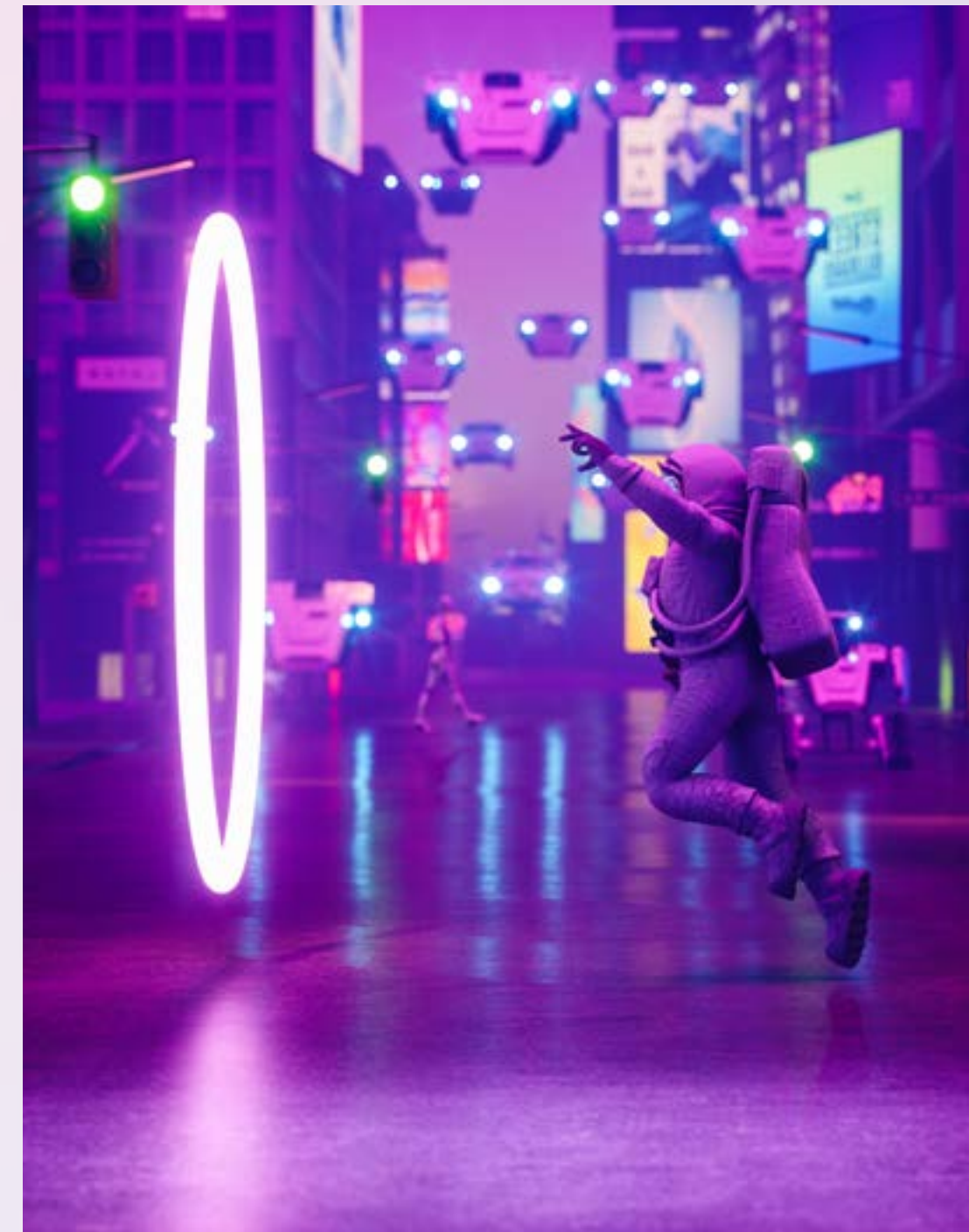
The decisive factor often hinges on access to talent. The market for individuals possessing Gen AI skills is experiencing robust growth. Nonetheless, this dual-edged realization unveils a striking paradox: 78% of industry leaders identify a shortage of suitable skills, expertise, or knowledge as the foremost impediment to realizing successful adoption.



Effective training and educational resources

Named by **59%** of leaders

Training is a clear way for leaders to achieve a digitally savvy management team and employees who can successfully implement and support Gen AI. 71% of leaders are preparing the workforce for Gen AI by upskilling existing talent. Meanwhile, 46% are collaborating with tech vendors to augment their workforce. In the wake of this seismic technological shift, workforces will not be replaced, but reskilled.





User-friendly AI technology

Named by **53%** of leaders

Training is a clear way for leaders to achieve a digitally savvy management team and employees who can successfully implement and support Gen AI. 71% of leaders are preparing the workforce for Gen AI by upskilling existing talent. Meanwhile, 46% are collaborating with tech vendors to augment their workforce. In the wake of this seismic technological shift, workforces will not be replaced, but reskilled.



Effective communication and change management

Named by **51%** of leaders

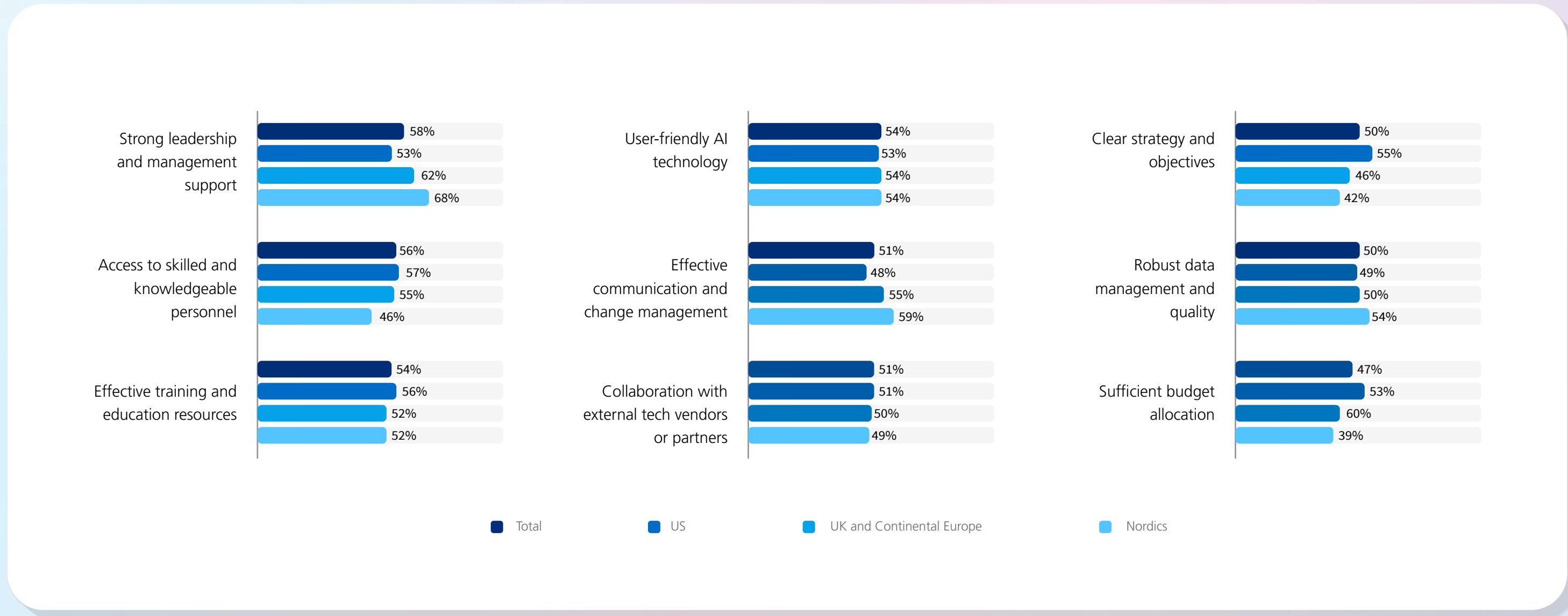
Leaders report that in order to realise the transformative possibilities of Gen AI, organizations must have an effective change management strategy. When adopting this technology, institutions undergo a significant transition. This must be supported by structures, processes and systems, and workforces must undergo a shift in mindset. Leadership teams will have to model a new way of working, and effective communication across the organisation must be in place to support behavioural change.

57%

in the US name access to skilled personnel as their top concern

For businesses in UK and Continental Europe and the Nordic countries, the most important priority on the Gen AI adoption journey is strong leadership and management support (62% UK and Continental Europe, 68% Nordics). This is an interesting contrast to the US, where the top concern is named as access to skilled and knowledgeable personnel (57%). In a region where the use of Gen AI is more established, the focus is less on change management. Instead, businesses who are further along their Gen AI journey seek to address a key emerging challenge: hiring employees with the skill set necessary to support a nascent technology.

For UK and Continental Europe and the Nordics, effective communication and change management joins strong leadership as a priority



Q. Which of the following do you believe to be the key factors for successful adoption and implementation of generative AI in your organization?

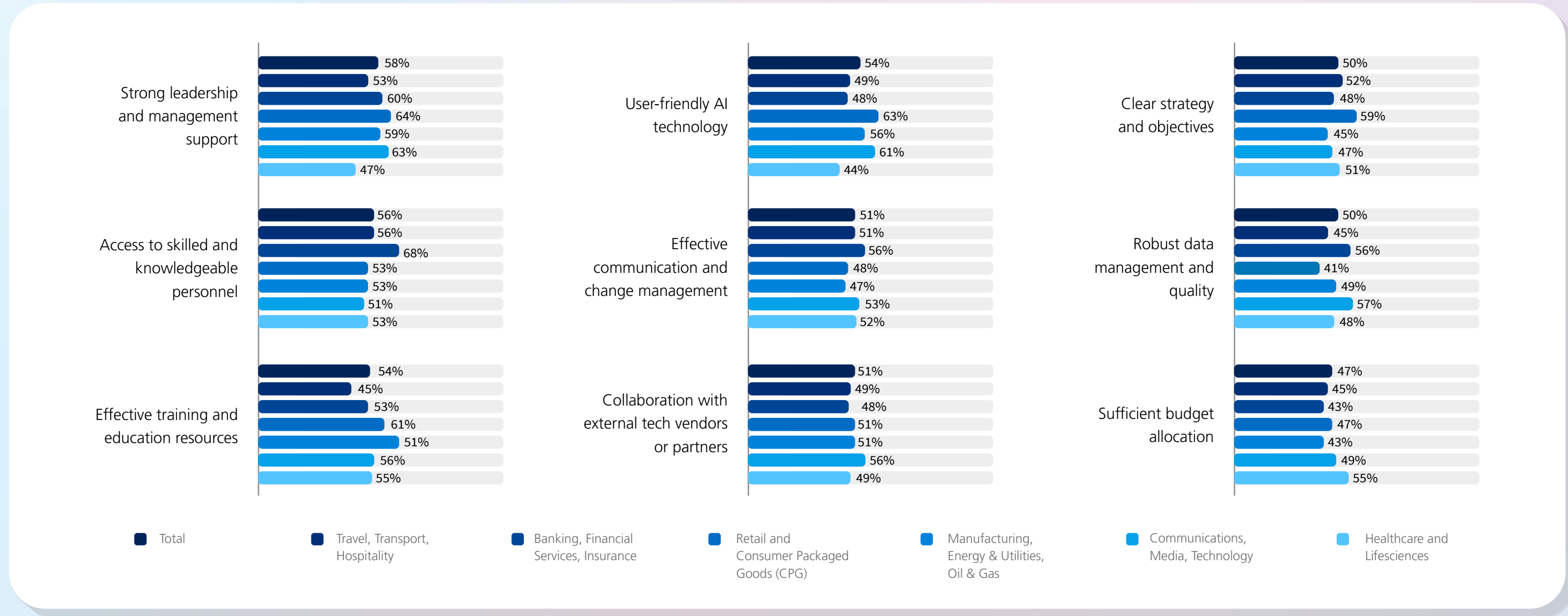
50%

say a clear AI strategy is essential for success

Across different industries, different priorities come to the fore when considering the Gen AI adoption journey. For the consumer-focused retail and manufacturing industries, and the public-facing media, the most important concern is strong leadership and management support. This may reflect a concern about managing consumer / public trust in Gen AI solutions, and the need for processes and messaging to be clear and unified. In the travel and banking industries, the top consideration is access to skilled and knowledgeable personnel, perhaps indicating a lack of talent in these industries with relevant AI skills. Within healthcare, the key priority is effective training and educational resources, a clear concern for an industry in which Gen AI may operate in sensitive contexts.



User-friendly AI technology is a significant concern across the retail, manufacturing, and communications sectors



Q. Which of the following do you believe to be the key factors for successful adoption and implementation of generative AI in your organization?



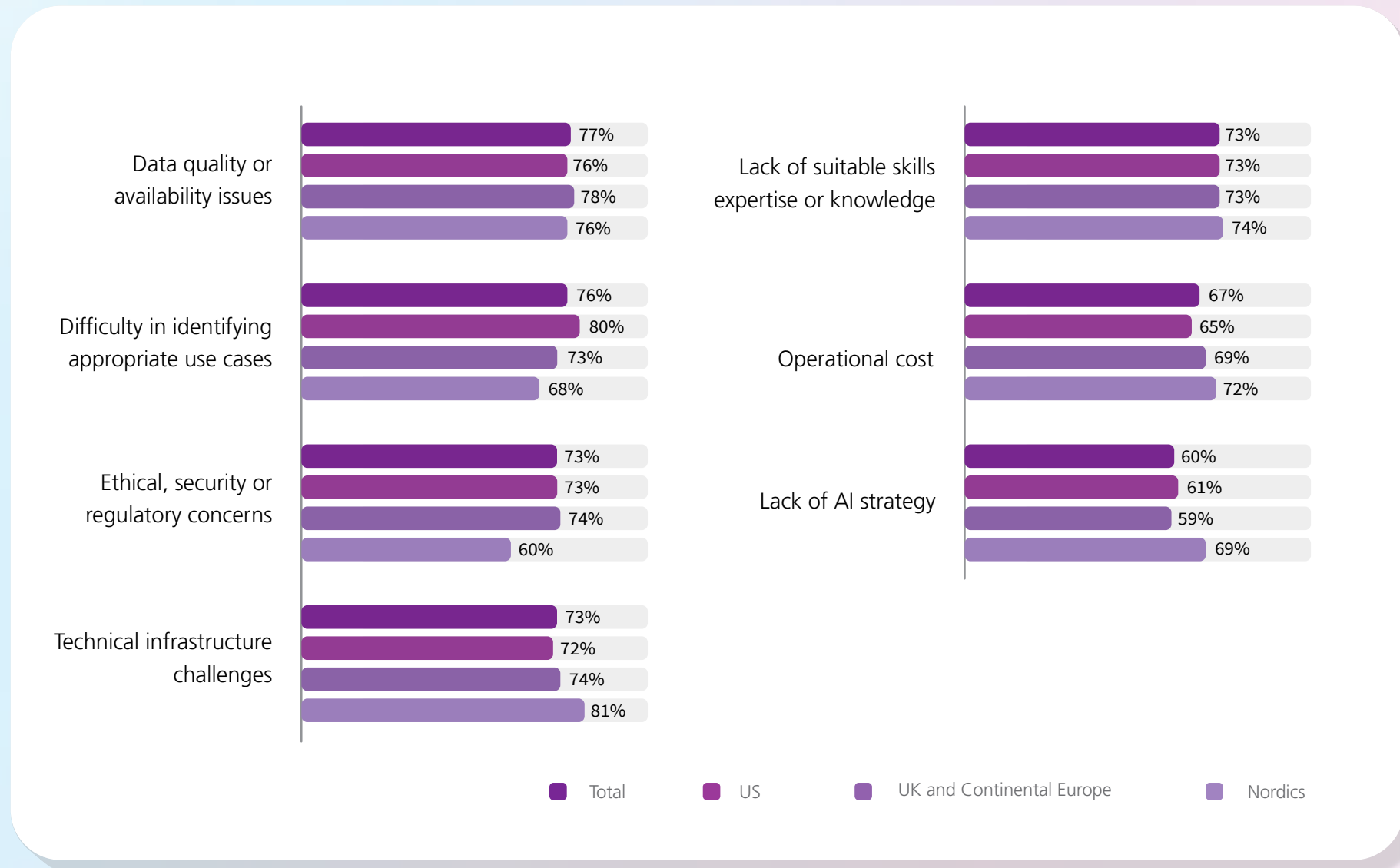
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4

Scaling the Summit

Late Gen AI entrants face cost, data,
and infrastructure challenges

Data Challenges and Use Case Hurdles: Primary Barriers to Gen AI Adoption



Q. What are the greatest barriers to the successful adoption or scaling of generative AI solutions within your organization?

67% see operational cost as one of the barriers

Three of these barriers – the issues with data quality, identifying use cases and ethical issues of various kinds – were felt across all respondents, not just late adopters. Different regions struggle with different obstacles on their path to Gen AI adoption. For the US, the key barrier is identifying appropriate use cases (cited by 80%). For the UK, Continental Europe, and the Nordics, it's data quality or availability issues (78%) while for the Nordics, the number one barrier is technical infrastructure challenges (81%).



Data quality or availability issues

Named by **77%** of respondents

Data quality or availability issues are a common barrier to Gen AI adoption – for instance, an online retailer might struggle with AI-driven product recommendations if their existing customer purchase data is incomplete or inconsistent. Without high-quality input data, businesses find it difficult to achieve meaningful and coherent outputs using Gen AI.



Operational cost

Named by **67%** of respondents

Cost is a significant barrier to Gen AI adoption, resulting in a field of leaders who are predominantly larger organizations. Operational cost is identified by 85% of late adopters as the most important barrier to Gen AI implementation. The irony is that leaders report that Gen AI proves to be a reliable return on investment once the cost barrier is overcome.



Difficulty in identifying appropriate use cases

Named by **76%** of respondents

The challenge of identifying appropriate use cases was named as a barrier to Gen AI implementation by 80% of US-based firms: the most common barrier for this region. With so many possible use cases, and considering the transformative effect it might have on a business' operations, deciding how to use Gen AI is a key concern for adopters. For example, a manufacturing firm might struggle to decide whether to apply AI to quality control or supply chain optimization.

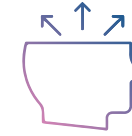




Lack of AI strategy

Named by **60%** of respondents

Late adopters might not be sure how to get started or what their priorities should be when starting their journey with Gen AI. Since implementing Gen AI systems often involves significant investment in technology and training, and sometimes requires companies to restructure their operations, a strategic approach is paramount.



Lack of suitable skills, expertise, and knowledge

Named by **73%** of respondents

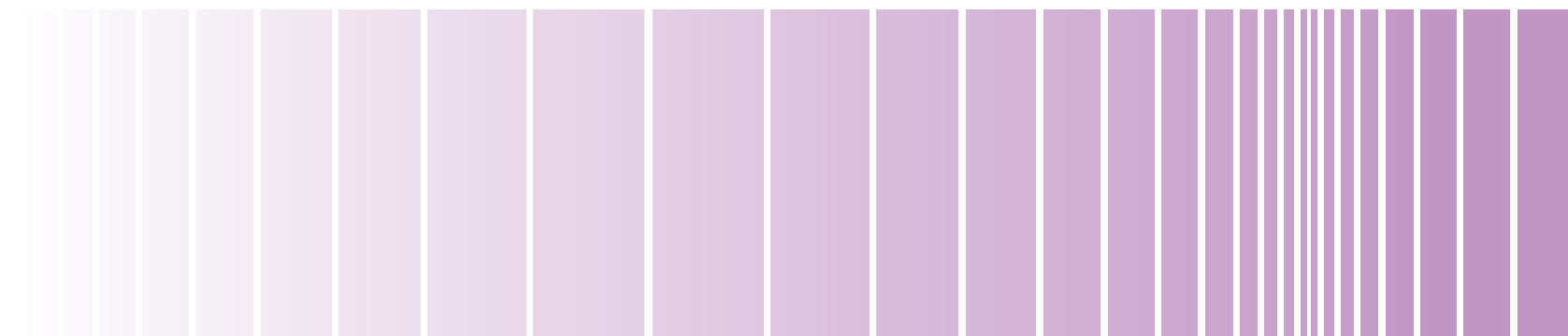
Cost is a significant barrier to Gen AI adoption, resulting in a field of leaders who are predominantly larger organizations. Operational cost is identified by 85% of late adopters as the most important barrier to Gen AI implementation. The irony is that leaders report that Gen AI proves to be a reliable return on investment once the cost barrier is overcome.



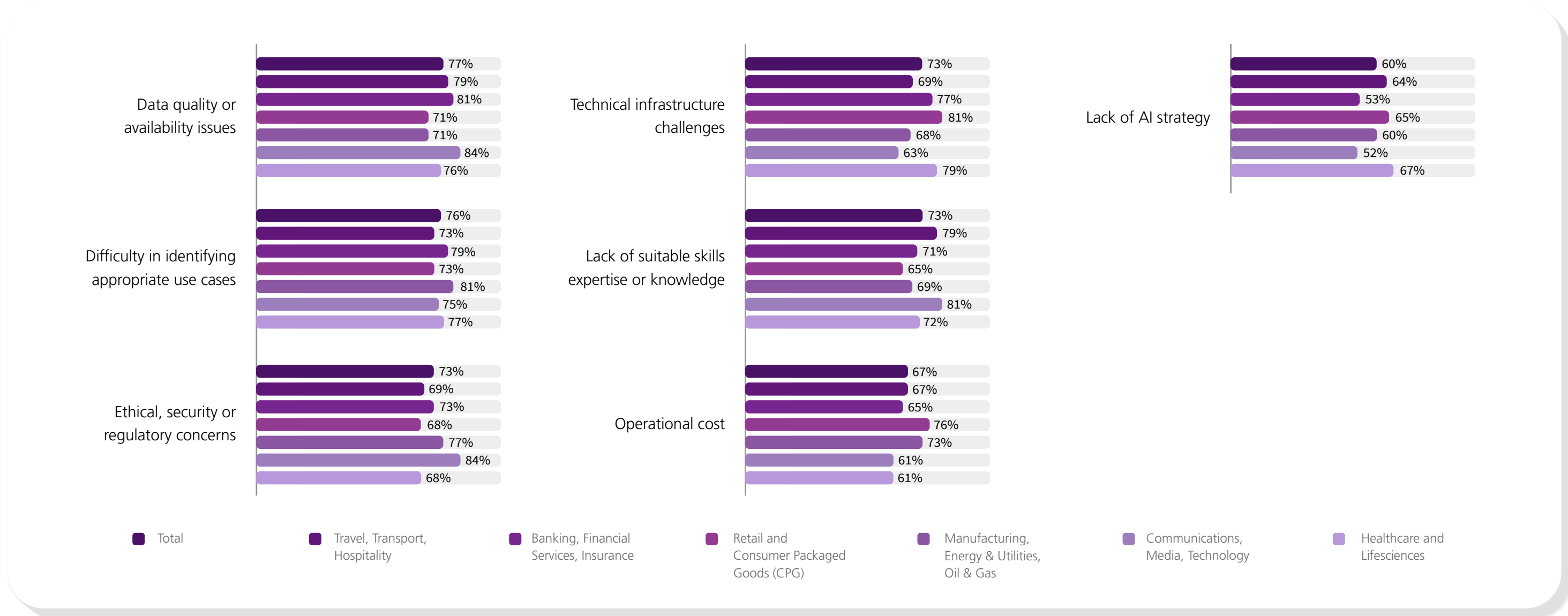
Regulatory issues

Named by **76%** of respondents

In this changing landscape, businesses are keen to develop policies and standards to safeguard their use of Gen AI, and this is of particular concern for leaders (see 'Leaders are focused on developing mindful AI.') It's clear that, as organisations develop their usage, they must monitor and evaluate the technology against standards of reliability, safety and ethics.



81% of manufacturers identify difficulty in identifying appropriate use cases for Gen AI as the chief barrier to adoption



Q. What are the greatest barriers to the successful adoption or scaling of generative AI solutions within your organization?

Generative AI: How Early Adopters Are Getting It Right

Early adopters are true weathervanes in the technology space. They inform us of the direction in which the wind blows. More importantly, they provide us with critical early indicators that contribute to the long-term success of technology adoption based on field experiences. The Roger theory tells us that early adopters drive industry behavior by reducing the uncertainty around new ideas¹.

The insights gleaned from early adopters of generative AI (Gen AI), can help enterprises to avoid missteps and false starts. Enterprises can take a more considered approach to the technology, set expectations, determine investments, and accelerate outcomes.

Given the potency of Gen AI to reinvent entire industries and business processes, there is significant pressure from investors and customers to make fast moves in deploying Gen AI use cases. This creates risks as missteps will result in setbacks which can derail the AI strategy. So, it is essential to get behind what early adopters are signaling:

- Are there specific use cases or functions more suited for experimenting with the new technology?
- For which use cases can we expect the best ROI with the least risk?
- Which applications can be presented to end customers, and which applications might be risky without moderation?

- What investments in people will be necessary for upskilling and cross-skilling?
- Which partnerships should be given priority?

Our study, The State of Generative AI Adoption, was designed to shed light on the thinking, decisions, and actions of early adopters of Gen AI. Among the host of invaluable insights, it extracts from users of Gen AI, the study makes three things clear:

- 1. Use Gen AI to amplify customer experience:** Leaders who have extensively adopted Gen AI across multiple functions or the entire organization are using Gen AI to improve customer experience (81%). This is true for even those businesses with moderate adoption of the technology within specific areas of business (71%). The technology's ability to handle and parse immense volumes of data – with its large language models (LLMs)—helps it quickly and accurately summarize reports (examples: financial, medical, sales, marketing, and compliance); from a consumer perspective, the technology can go beyond locating a product to looking for a solution; it can customize images in real-time based on customer profiles and preferences (example: show a customized thumbnail of a show on Netflix to increase viewership), etc.

The applications of Gen AI in the area of customer experience are limitless. The good news, say innovation management experts from Wharton, is that APIs from big tech will make sure integrating LLMs into digital user experiences will be democratized: “Even a small healthcare start-up, or a school

Jitendra Putcha
EVP – Data, Analytics & AI,
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district with antiquated technology infrastructure, will have access to this technology.²” They also warn that integrating the skills of LLMs will soon become “table stakes” – meaning, the sooner a business leverages Gen AI to improve customer experience, the better. If your business has a use case related to customer experience, Gen AI should be a top priority.

2. Focus on talent and next-generation skills: Our study shows that in the US, the most important factor in the successful adoption of Gen AI is access to skilled personnel (57%). By contrast, UK and Continental Europe highlights leadership (62%), and the Nordics rate this factor even higher (68%). Strong leadership, management support, and access to skills were listed as three (of the five) top factors that dictate success. The access to skills cannot be emphasized enough. Globally, our study suggests that organizations that have extensively adopted Gen AI across multiple functions or the entire organization believe that access to skilled and knowledgeable personnel is the key to success (69%).

An essential skill required to leverage Gen AI is that of a prompt engineer and librarian. Anthropic, an AI start-up founded by former OpenAI team members and backed by Google, observes, “Given that the field of prompt engineering is arguably less than two years old, this position is a bit hard to hire for!” The company was offering a salary in the range of US\$250,000 to \$375,000 for the position³. A vital requirement of the position was “a creative hacker spirit and a love for solving puzzles with a grasp of Python.”

The implications of this data on skills acquisition are straightforward: for the moment, businesses considering Gen AI as part of their strategy would do well to partner with a technology provider with a dependable Gen AI talent bank. Meanwhile, businesses must wait to create in-house talent for this function until prompt engineering is offered as an academic course with industry-specific university specializations.

3. Identify the right use case balancing risk & reward: Our study shows that leaders in Gen AI usage are exploring new use cases (80%). Not finding a proper use case can become a significant barrier to adoption, followed by data quality and availability issues (as expressed by 78% of respondents in UK and Continental Europe) and technical infrastructure challenges (as expressed by 81% of respondents in the Nordics). An interesting use case that showed up in the study was product development—two-thirds of leaders want to use Gen AI to accelerate new product development.

Marketing and sales, corporate finance, supply chain, and human resources also showed up in the study as fertile areas for use cases. However, every industry will have its priorities that drive the adoption of Gen AI: media, tech, and healthcare will use it for new product development; travel, transport, and hospitality will use it to improve customer experience; the communication sector will use to enable data-driven decision-making and improve productivity.

Aside from boosting creativity and driving initiatives around product development, customer experience, and productivity, Gen AI can drive cost reduction, process accuracy, training and growth, manage privacy and security, detect fraud, and enhance quality control and safety.



¹ *Diffusion of Innovations*, Everett M. Roger, Simon and Schuster, 2003: https://books.google.co.in/books/about/Diffusion_of_Innovations_5th_Edition.html?id=9U1K5LjUOwEC&redir_esc=y

² *Create Winning Customer Experiences with Generative AI*, by Nicolaj Siggelkow and Christian Terwiesch, *Harvard Business Review*, April 4, 2023: <https://hbr.org/2023/04/create-winning-customer-experiences-with-generative-ai>

³ Anthropic, last retrieved October 4, 2023: <https://jobs.lever.co/Anthropic/e3cde481-d446-460f-b576-93cab67bd1ed>



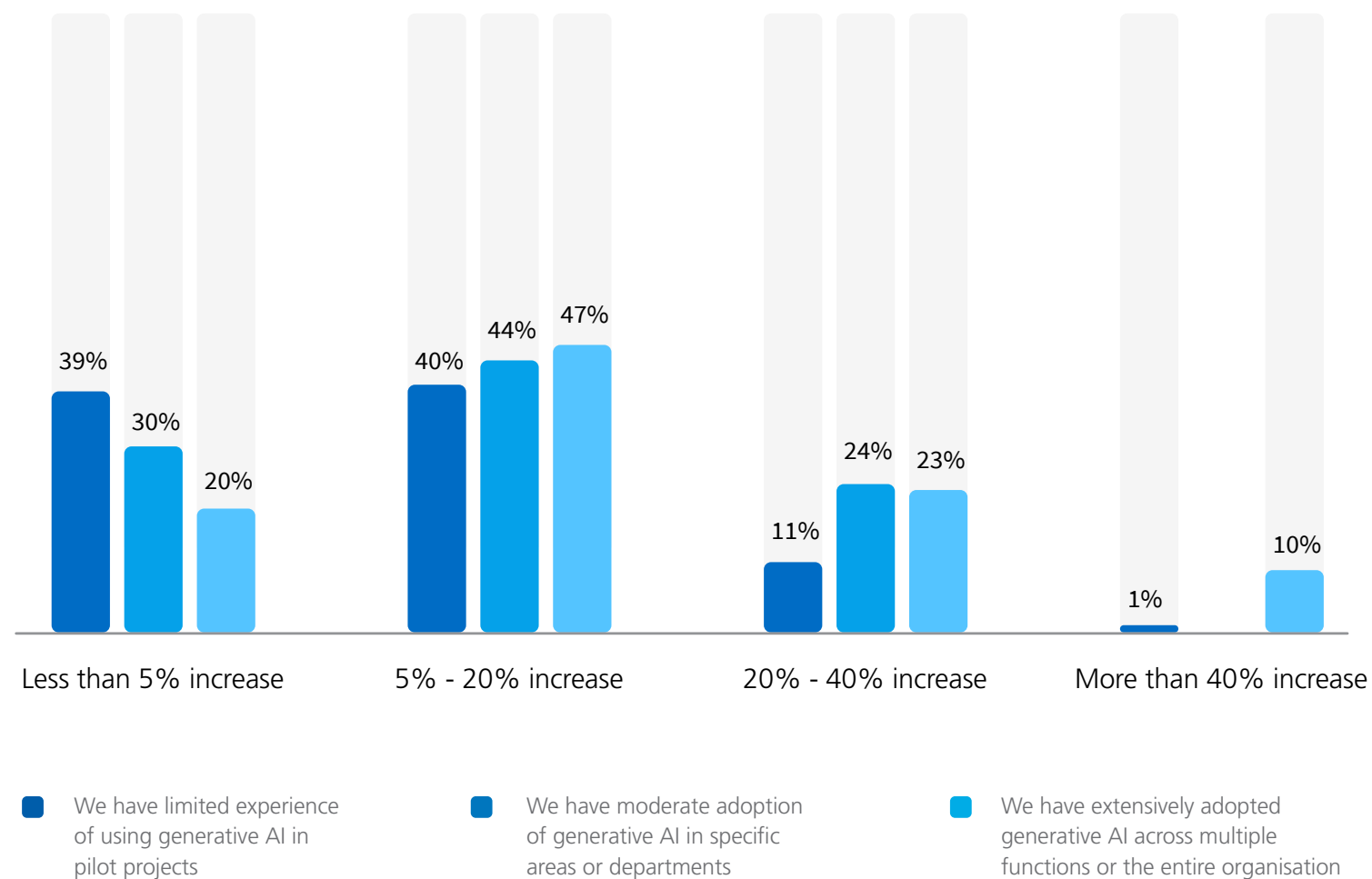
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5

Riding the Wave

Early adopters witness revenue gains and cost reductions

Early adopters already ahead with Gen AI



Q. Which of the following do you believe to be the key factors for successful adoption and implementation of generative AI in your organization?

- **For a third of leaders (33%), Gen AI increases revenue by 20% or more**

As organizations grow acquainted with Gen AI, they are increasingly recognizing the multitude of benefits it offers. Notably, 28% of leaders have discovered that leveraging Gen AI results in an improvement in operational efficiency, ranging from 20% to 40%. In comparison, only 14% of moderate adopters experience this level of enhancement.

Extensive adopters observe a significant positive impact on their bottom line, further highlighting the value and potential returns this technology brings. 80% of leaders see Gen AI increase revenue by 5% or more. For 33%, revenue grows by at least 20%. According to the survey, a third (33%) of organizations reported a decrease in costs by less than 5%, while 55% experienced a decrease between 5% and 20%, and 8% witnessed a substantial 20% to 40% decrease in costs. Notably, experienced Gen AI users saw even greater savings, with 19% reporting a 20% to 40% decrease in financial outlay.

- **US sees costs decrease 20% more than UK and Continental Europe and the Nordic regions**

Analysing the regional impact, it is apparent that regions with higher investment in Gen AI are experiencing more pronounced positive outcomes. While companies across all regions have observed cost reductions, a significant 72% of US businesses reported a decrease of 5% or more, compared to 55% in UK and Continental Europe and 52% in the Nordic region. This discrepancy reflects the greater investment in Gen AI technologies made by organisations in the United States.

- **80% of Gen AI leaders are exploring additional use cases**

Having experienced these benefits, leaders in Gen AI usage demonstrate an eagerness to further explore and invest in the technology. Among those who have not yet adopted Gen AI models, 75% are investing in research and development. In contrast, 80% of Gen AI leaders are actively exploring new use cases, indicating a strong commitment to expanding the technology's applications. This trend is more prevalent in the United States than in Continental Europe or the Nordic regions. However, the UK and Continental Europe stands out as a front-runner in scaling up existing Gen AI initiatives, demonstrating its proactive approach to leveraging the technology's potential.



75%
of US businesses
reported a cost reduction
of 5% or more

Charting the future with collaborations and partners

- **71% of leaders are upskilling the workforce to support the future use of Gen AI**

Early adopters are giving us a glimpse into what the future of work may look like. It seems that, in the wake of this seismic technological shift, workforces will not be replaced, but reskilled. 71% of leaders are preparing the workforce for Gen AI by upskilling existing talent. Meanwhile, 46% are collaborating with tech vendors to augment their workforce – rather than investing in permanent hires in the early stages of development

- **Over half of leaders co-develop Gen AI solution with partners**

Leaders who have already embraced Gen AI, and reaped significant benefits, are allocating sizable resources to developing their use of the technology. A notable 37% of leaders are dedicating 10–25% of their IT resources to generative AI projects, recognising it as a worthwhile investment. Additionally, 52% of leaders and moderate adopters are choosing to co-develop Gen AI solutions with tech partners or vendors, particularly in the US. Open-source tools are also gaining popularity, with 48% of leaders and 44% of moderate adopters opting for this user-friendly software. Late adopters are following suit, with 81% planning to co-develop Gen AI solutions in the next 12-18 months, and 61% opting to use open-source tools over the same period.

- **Five advantages of collaborating with vendors on Gen AI**

There are five clear reasons why half of leaders and moderate adopters are choosing to develop Gen AI solutions in collaboration with vendors.

Expertise: Collaborating with vendors allows companies to combine their domain-specific knowledge with the technical expertise of their partner.

Cost efficiency: Research and development costs can be distributed between companies and vendors to make the process more affordable.

Risk mitigation: Working with experienced partners can reduce the potential risks in the development phase.

Speed customization: Vendors may have tools and frameworks in place to accelerate the deployment process. They can apply their specialist capabilities to a business' specific needs, creating a tailored solution.

Continuous support: Companies can rely on ongoing support, maintenance, and updates from their partner, ensuring that the technology functions well over time.

Navigating the Gen AI Roadmap: From Efficiency to Creativity

Innovation is the lifeblood of a business. The arrival of generative AI (Gen AI) heralds a new and exciting chapter in innovation. With its ability to generate new data indistinguishable from existing data, the technology—with Large Language Models at its core—delivers new ideas, processes, designs, content, and code. It is, therefore, no surprise the technology has captured the interest of businesses across industries.

In the fashion industry, Gen AI has surprised us by using the style of legendary fashion designers to create a realistic catwalk with futuristic clothes and environments¹; it is helping research legal libraries, summarize cases, and draft legal documents using natural language conversations²; it can generate characters, dialogues, and movie scenes (as was done for Everything Everywhere All at Once that won 7 Oscars in 2023³); it can optimize component placement in semiconductor chip design.⁴

These are eye-popping examples of transformation. They capture our imagination but are not illuminating when determining how the new technology can be leveraged to solve common, everyday problems. To understand this, LTIMindtree decided to follow the breadcrumbs

of early adopters. For a study called The State of Generative AI Adoption – The Current Landscape and Lessons from Early Adopters, LTIMindtree surveyed 450 decision-makers in large organizations across the US, Europe, and the Nordics that were early adopters of Gen AI. The survey results provide an interesting panorama of insights for organizations waiting to create a Gen AI roadmap.

Our study shows that organizations widely using Gen AI improve operational efficiency by 20 to 40%. By contrast, those who have adopted it in a partial and limited manner enhance operational efficiency by a mere 14%. Shoring up operational efficiency around procurement, production/maintenance, distribution, sales and marketing, communication, fraud/anomaly/leakage detection, sustainability, customer experience, and decision-making enables scalability and profitability. Our study also showed that 8% of Gen AI users who had embraced it quickly and widely also saw a 20 to 40% decrease in costs. The study reaffirmed our belief that the most extensive adopters begin their journey by targeting improvements in operational efficiency.

Once these early adopters have tasted success, they use Gen AI to improve personalization, enhance customer experience, and aid product design.

Deepak Khosla

VP and Business Head, Enterprise AI,
LTIMindtree



A major fallacy around Gen AI is that the technology is used to generate creative content. Our study shows that two in five companies have reported this as a key reason to adopt the technology—with retail, CPG, travel, transport, and hospitality leading the trend— but streamlining creative content is a low priority for leaders. There is considerable wisdom in making content generation a low priority. The creative process is fueled by freedom and experimentation, not by rules and algorithms. It should remain in the hands—and heads—of humans. Using Gen AI for content, however, may benefit smaller organizations that may not have the budgets to create the large volume of content required to feed today's marketing and business programs.

The survey shows that 81% of organizations that have adopted Gen AI extensively across multiple functions or the entire organization use it to improve customer experience. In comparison, 68% use it to optimize processes and enhance efficiency. A mere 36% of these organizations use technology to streamline creative content generation.

The inability to logically place Gen AI in the technology roadmap is the primary barrier to harvesting the potential of the technology. However, the lack of Gen AI skills and capabilities can also hinder the creation of a well-rounded roadmap.

The challenge is in being able to use Gen AI applications and frameworks. These require natural language processing and deep learning expertise—skills that are in short supply. However, one of

the most sought-after roles currently is that of a prompt engineer. These experts can “talk” to Gen AI platforms to deliver the required results. Salaries for the role can range between US\$250,000 and US\$375,000.⁵ The task of a prompt engineer is becoming even more sophisticated with the emergence of new applications that improve prompts iteratively. Called Promptbreeders⁶, they use a self-referential loop to trigger a prompt mutation. The result is specialized high-performance prompts for specific applications outperforming state-of-the-art prompt strategies.

Early adopters are shedding light on where the Gen AI roadmap should lead. Organizations that are considering Gen AI as a business tool should examine the trends they are setting (download The State of Adoption of Generative AI – Lessons from Early Adopters now) to guarantee faster returns. But the supply of talent to help follow the roadmap has, unfortunately, not kept pace. Organizations have two options: wait for universities to offer formal courses in Gen AI that create the talent pool or leverage the existing talent available with their technology partners. It does not take much to place a bet on the fact that practical and ambitious organizations will choose the latter option for the next several years.

Deepak Khosla

¹ *Hyper-Realistic Meta Catwalk*, Fashion Innovation Agency: <https://www.fialondon.com/projects/hyper-realistic-meta-catwalk/>

² *Generative AI for Lawyers: What It Is, How It Works, and Using It for Maximum Impact*, LexisNexis, May 22, 2023: <https://www.lexisnexis.com/community/insights/legal/thought-leadership/posts/generative-ai-for-lawyers>

³ *How AI tools are creating new possibilities for movies and visual design, according to this AWS-powered startup*, Amazon, March 29, 2023: <https://www.aboutamazon.com/news/laws/how-ai-tools-are-creating-new-possibilities-for-movies-and-visual-design-according-to-this-aws-powered-startup>

⁴ *Beyond ChatGPT: The Future of Generative AI for Enterprise*, Gartner, January 26, 2023: <https://www.gartner.com/en/articles/beyond-chatgpt-the-future-of-generative-ai-for-enterprises>

⁵ *Anthropic*, last retrieved October 4, 2023: <https://jobs.lever.co/Anthropic/e3cde481-d446-460f-b576-93cab67bd1ed>

⁶ *Promptbreeder: Self-Referential Self-Improvement Via Prompt Evolution*, Fernando, C., Banarse, D., Michalewski, H., Osindero, S., & Rocktäschel, T., September 28, 2023 [2309.16797] *Promptbreeder: Self-Referential Self-Improvement Via Prompt Evolution* (arxiv.org)





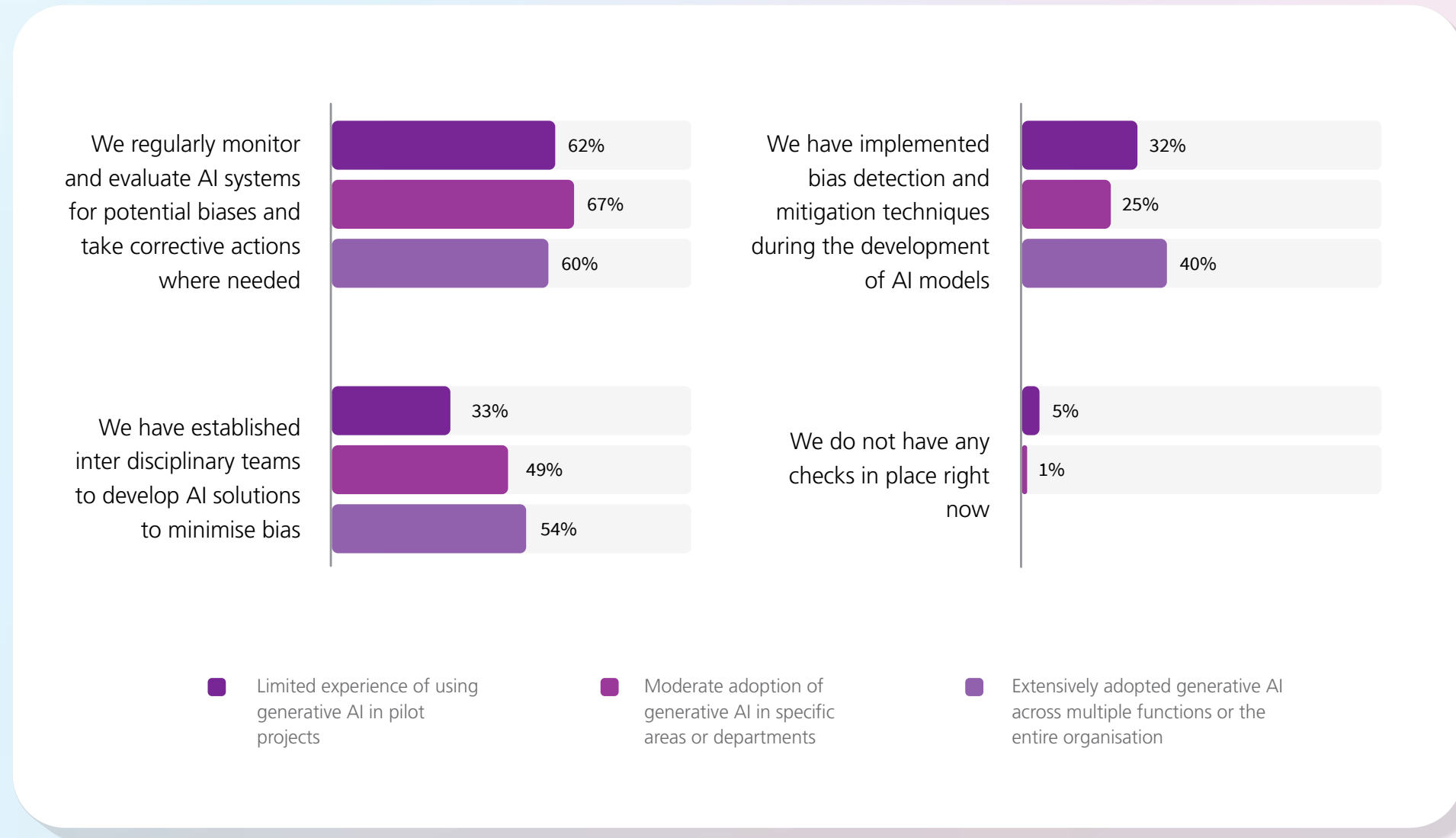
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Beyond the Code

Leaders champion 'Mindful AI' with 79% carrying out regular Gen AI usage audits

100% early adopters have some checks in place to counter bias



Q. Which of the following do you believe to be the key factors for successful adoption and implementation of generative AI in your organization?

79%

leaders consistently audit their Gen AI usage

The behaviour of leaders does not just serve as a harbinger of shifts in work culture but also of the rise of 'mindful AI.' An impressive 79% of leaders consistently audit their Gen AI usage for ethical compliance. Early adopters seek to address potential issues of bias and discrimination. As organisations progress in their use of Gen AI, they continue to monitor the technology for reliability, safety, and ethical usage. For companies who find themselves at the beginning of their Gen AI journey, one clear question emerges: How to ensure reliability, security, and ethical use of this emerging technology?

The Need for Ethical and Mindful Use of Gen AI

“Trust is the currency of interactions,” says Rachel Botsman¹, author of *Who Can You Trust?* and the creator of the first course on trust in the digital world at Oxford University’s Saïd Business School. When the interactions and relationships with a business cannot be trusted, it can lose as much as 30% of its value². The arrival of generative AI (Gen AI) throws a curved ball into the management of trust. Although Gen AI makes the tantalizing promise of revolutionizing business productivity, there are deep concerns around its ethical use, which can affect trust if not handled correctly. Understanding ethical issues and using that wisdom to keep the trust of customers, partners, and society is an immediate responsibility that businesses must fulfill.

Gen AI uses multi-modal large language models (MLLMs) to understand human language and for self-supervised learning. Algorithms, neural networks, and deep learning methodologies are then used over this model to generate new text, summarize documents, carry out translations, create code, conduct chats, and produce music, video, and images that did not exist before. This process is not without gray areas, bringing common ethical principles under the crosshairs of business. These ethical issues concern data provenance and bias, copyright violations, transparency, accountability, and data privacy.

There are several instances where Gen AI has proven to be problematic. In a recent incident, a lawyer in the US reportedly used ChatGPT for case research. The judge found that six cases being referred to did not exist and had bogus judicial citations. The lawyer was unaware that the contents created by ChatGPT could be inaccurate or even false³. This is not an isolated incident. Parents, teachers, and administrators are worried that children will use Gen AI applications to create their college assignments and pass them off as their own. Truthfulness and accuracy are at stake.

Another clear problem is associated with the data being used to train LLMs. The data could have originated anywhere (mostly the internet), and using it without permission can result in copyright violations. This September, 17 authors and the Authors Guild in the US sued OpenAI for copyright infringement, claiming that OpenAI used the authors’ work to train its AI tools without permission⁴. Designer and educator Steven Zapata, who is fighting to protect artists’ rights, says, “The performance of the model would not be possible without all of the data fed into it – much of it copyrighted.”⁵

For now, the most widely felt ethical problems revolve around using biased or false information as input, data laundering or using someone else’s data to manufacture your content to run your systems and applications, and passing off Gen AI content as your own.

To unravel how businesses were approaching Gen AI and the challenges around its use, LTIMindtree surveyed 450 early adopters of the technology across the US, UK and Continental Europe, and the Nordics. Called *The State of Generative AI Adoption*, the study found that leaders were focusing on developing “mindful” AI. As many as

Nachiket Deshpande
Whole Time Director and COO,
LTIMindtree



60% of the organizations that had extensively adopted Gen AI across multiple functions, or the entire organization said they regularly monitored and evaluated AI systems for potential biases and took corrective action where needed. Those with moderate adoption of the technology (67 %) were also doing likewise. Across the surveyed group, 79% regularly audited their usage of Gen AI. These leaders and early adopters tell us a story: If standards of safety, reliability, security, and ethics are not maintained, there will be trouble ahead; there will be a loss of trust. Besides brand erosion, legal penalties may be expensive.

Using generative AI to advance business and the cost of creating ethical policies go hand in hand. Organizations that solve ethical challenges will move ahead with confidence. They will engage AI practitioners and researchers to help build models that filter misinformation; they will use ethically sourced and non-biased data for training their models; the usage of these models will be controlled; regulatory bodies will be welcomed to examine their systems; and these organizations will remain transparent to their customers, clearly providing indicators of where Gen AI is used in their processes.

Businesses must create strategies – backed by talent – to build trust models when using Gen AI. They must have safeguards for the use of data and their self-learning algorithms. They must create processes that identify and stop the use of misinformation. They must proactively inform customers and users of flaws and breaches that

endanger their privacy or safety.

Organizations will do well to consider the early creation of a body such as the Department of Digital Trust with a full-time Digital Ethics Officer at its head. Deploying Gen AI cannot be considered successful until a structured approach to ethics is in place.

Nachiket Deshpande

¹ Rachel Botsman: An Economy of Trust, Mike Sturm, NORDIC Business Report, February 4, 2018: <https://www.nbforum.com/nbreport/rachel-botsman-economy-trust/>

² Good News for Disgraced Companies: You Can Regain Trust, Lane Lambert, Working Knowledge, Harvard Business School, July 7, 2021: <https://hbswk.hbs.edu/item/good-news-for-disgraced-companies-you-can-regain-trust>

³ ChatGPT: US lawyer admits using AI for case research, Kathryn Armstrong, BBC News, May 27, 2023: <https://www.bbc.com/news/world-us-canada-65735769>

⁴ George R.R. Martin Among 17 Authors Suing OpenAI for Copyright Infringement, Charlie Wacholz, IGN India, September 21, 2023: <https://in.ign.com/news/194577/george-rr-martin-among-17-authors-suing-openai-for-copyright-infringement>

⁵ The End of Art: An Argument Against Image AIs, Steven Zapata Art, October 18, 2022: <https://www.youtube.com/watch?v=tjSxFAGP9Ss&t=1831s>

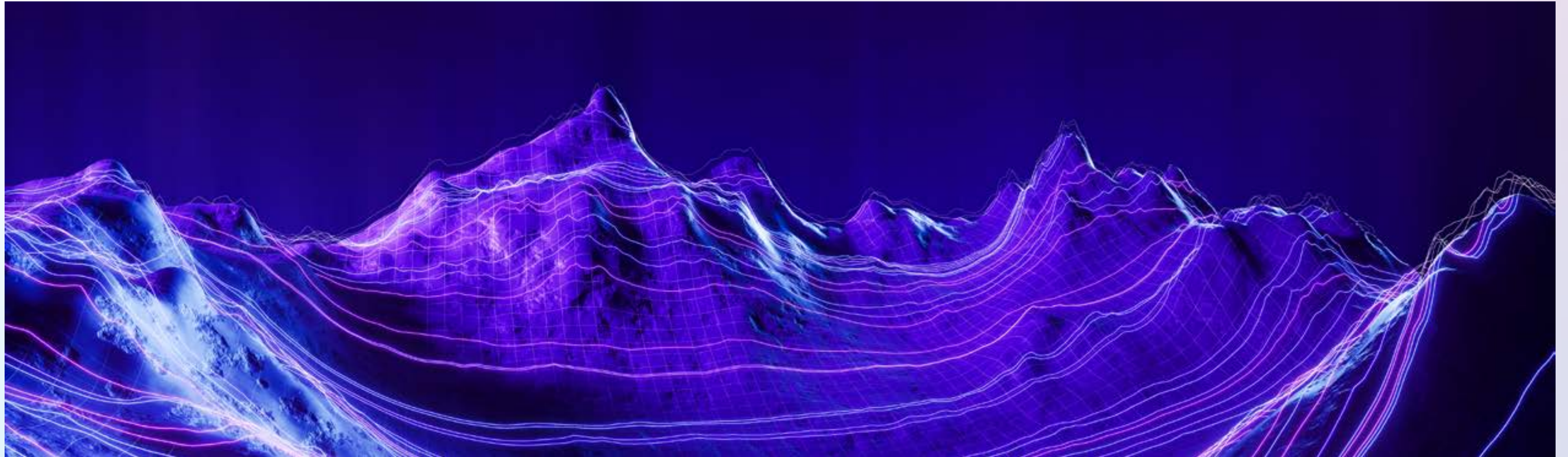




About this research

In July and August 2023, a survey was conducted by LTIMindtree, which included 450 decision-makers from organizations with annual revenues exceeding \$250 million, focusing on Gen AI adoption. Respondents were evenly split between the United States and Europe, with 18% in the Nordics. Of these organizations, 85% were actively using Gen AI, with 32% having limited usage and 53% moderate to extensive adoption.

The study encompassed various sectors, including 'Travel, Transport and hospitality,' 'Banking, Financial Services, and insurance,' 'Retail and Consumer Packaged Goods (CPG),' 'Manufacturing, Energy and utilities, Oil and gas,' 'Communications, Media and technology,' and 'Healthcare and Lifesciences.' Respondents held senior positions like Head of IT, Director of Strategy, Head of Finance, and Director of Digital. The survey employed a phone-to-web methodology, with respondents initially contacted via phone and later completed the survey online at their convenience.



About LTIMindtree

LTIMindtree is a global technology consulting and digital solutions company that enables enterprises across industries to reimagine business models, accelerate innovation, and maximize growth by harnessing digital technologies. As a digital transformation partner to more than 700 clients, LTIMindtree brings extensive domain and technology expertise to help drive superior competitive differentiation, customer experiences, and business outcomes in a converging world. Powered by 83,000+ talented and entrepreneurial professionals across more than 30 countries, LTIMindtree — a Larsen & Toubro Group company — combines the industry-acclaimed strengths of erstwhile Larsen and Toubro Infotech and Mindtree in solving the most complex business challenges and delivering transformation at scale. For more information, please visit <https://www.ltimindtree.com/>.

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