# GIC Bridge Forum Survey – Final Results

May 05, 2025

# The survey is representative of a wide base of industries and company sizes

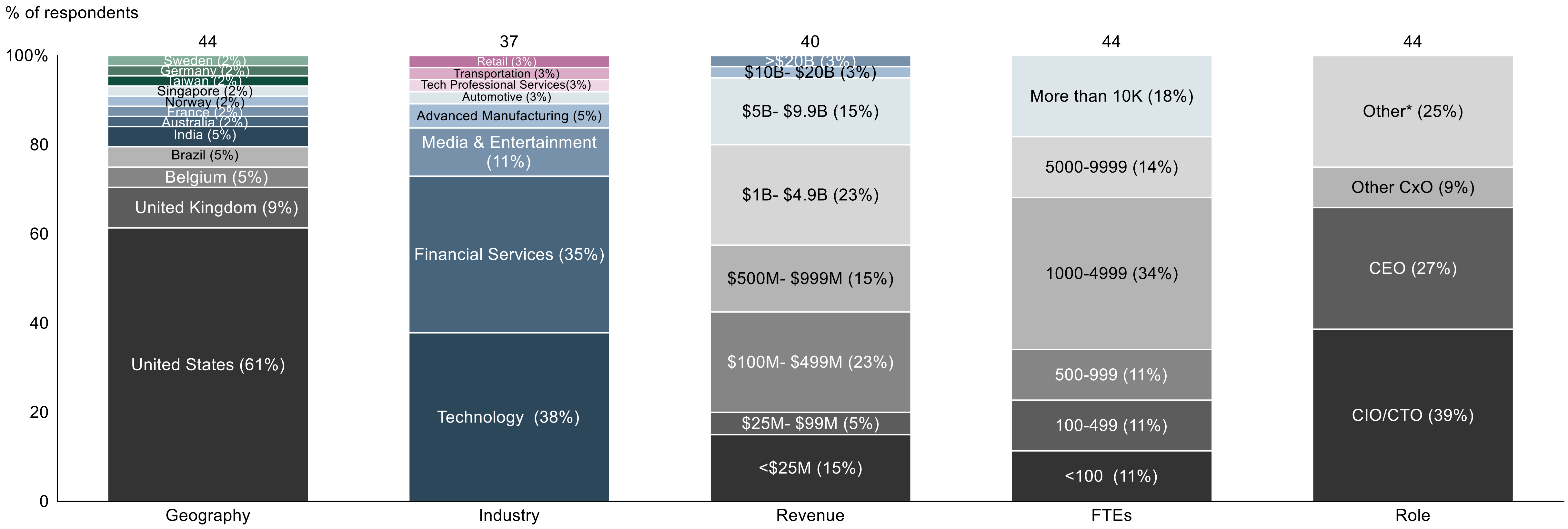
Which **country** is your company based in?

Choose the **industry** that best describes your current organization.

What is your organization's **current revenue**?

How many **full-time employees** work at your organization globally?

What best describes your **title**?

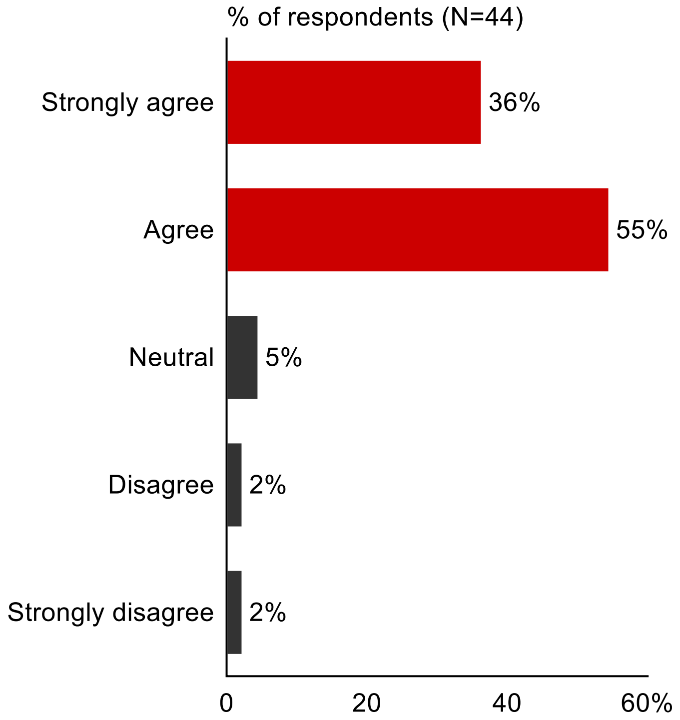



Note: “Prefer not to answer" and "Other" responses hidden, *Primarily includes roles like Chairman, VPs, and Directors
Source: Project GenAI (N=44)

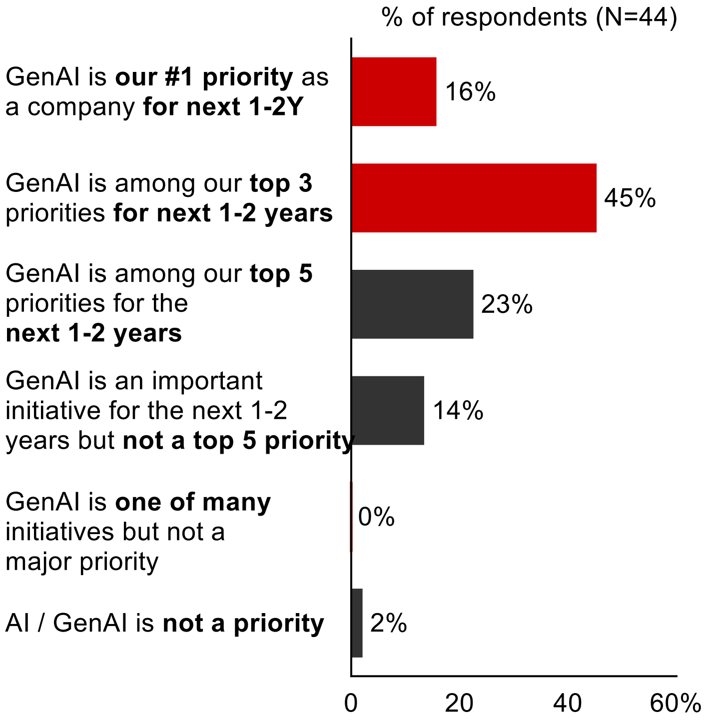
AGENDA

# Majority of firms see GenAI as a top priority with the right overall vision, and around half have determined the right path forward

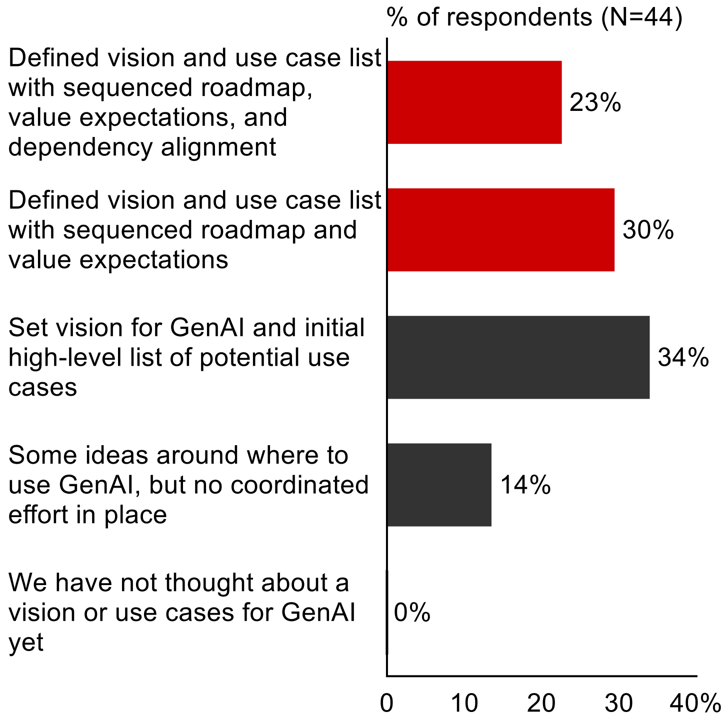
My company has a **clear overall strategy** and direction **around AI and GenAI** specifically




Where does **AI / GenAI rank** as an overall **company priority** for the **next 1-2 years**?




How clear is your **company's vision** for GenAI and how **well defined** are its use cases?



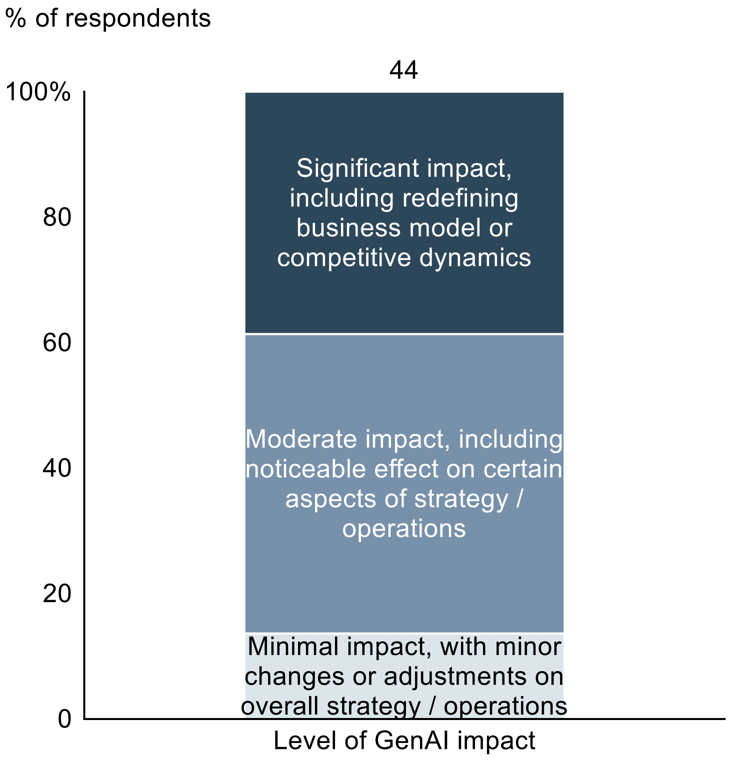

**~60% see GenAI as a top 3 priority in next 2Y**

**~55% have a defined GenAI vision**

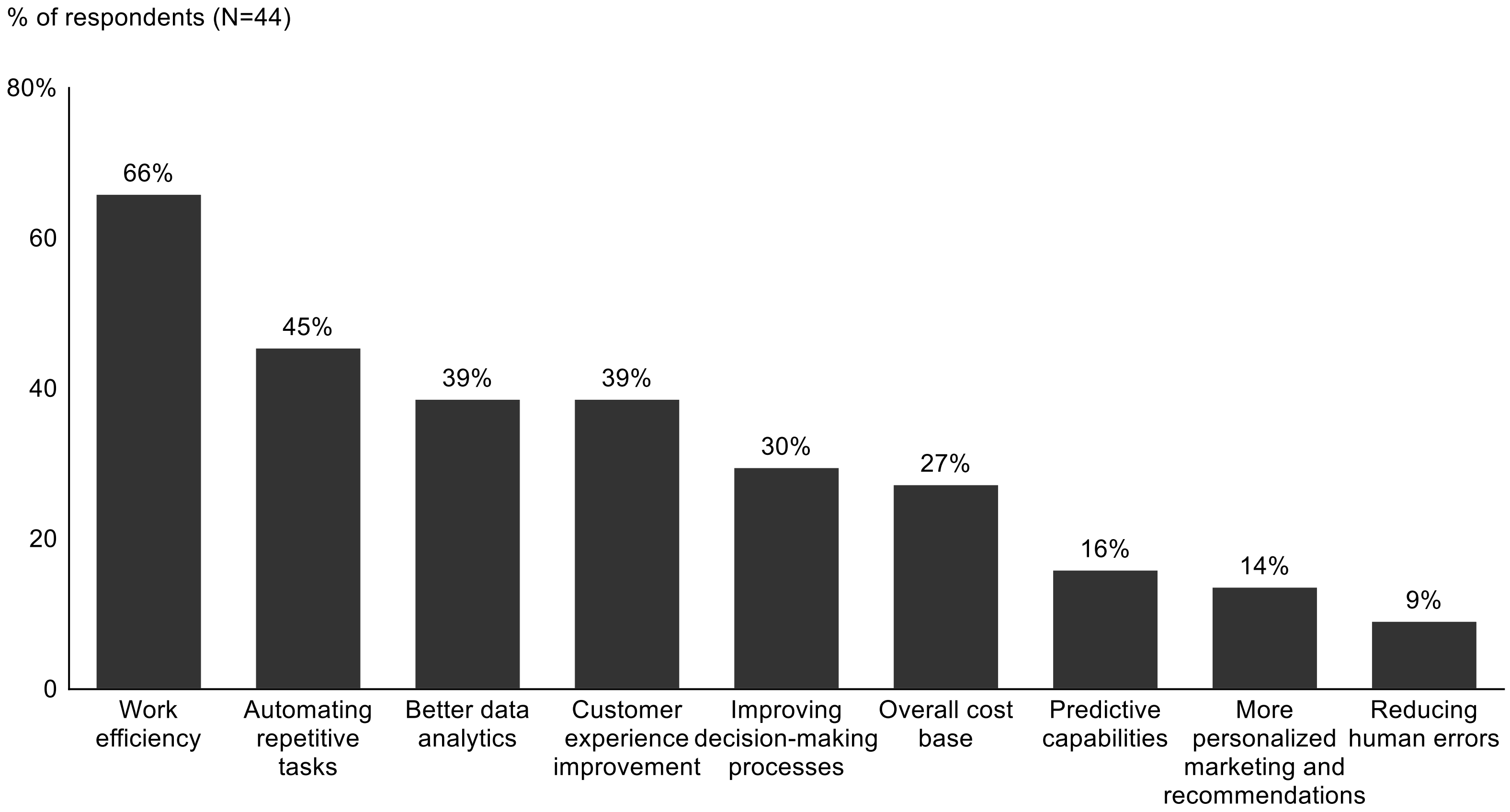
Source: Project GenAI (N=44)

# Leaders expect AI will have moderate to significant impact on their work in the future; work efficiency is the top 'problem' addressed by AI

What level of impact do you think AI / GenAI will have on your organization in the **next 3 years**?



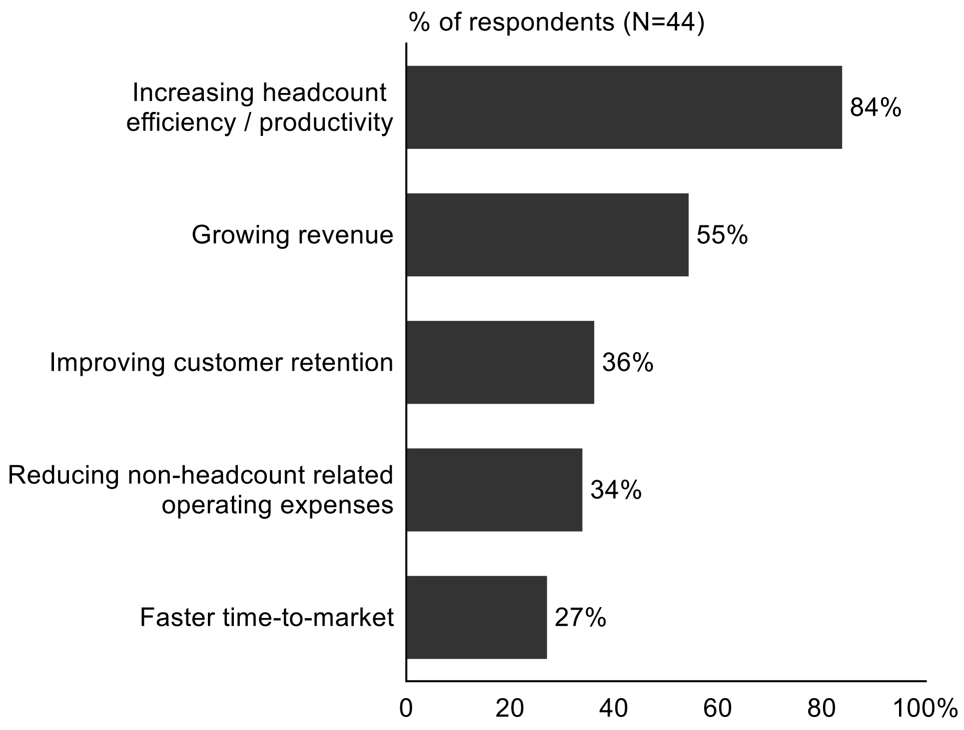

What are the **top problems** that you would like to have **solved by AI**? *Rank up to 3 problems.*



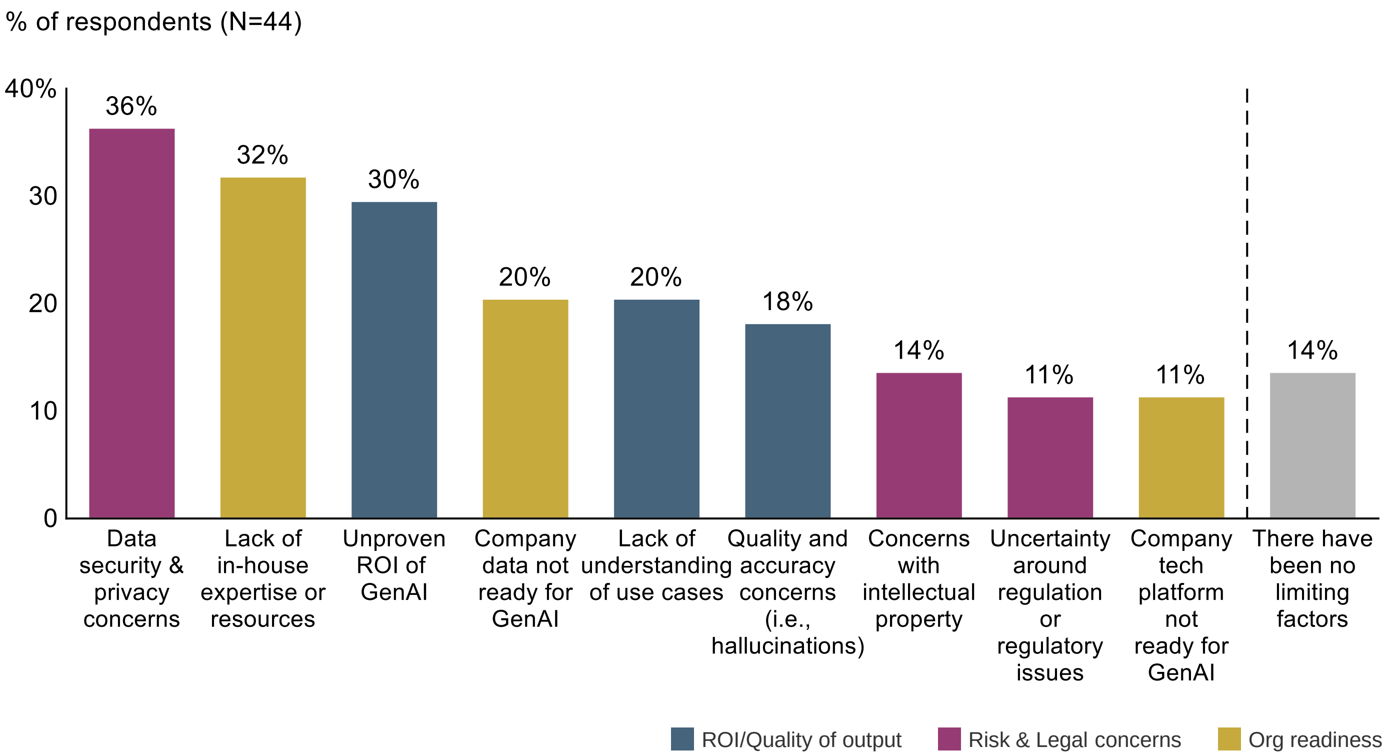

Note: "Other" responses hidden; RHS: problems ranked by less than 9% respondents hidden
Source: Project GenAI (N=44)

# Firms most commonly aim to use GenAI for efficiency and productivity; privacy / lack of expertise concerns remain the biggest roadblocks

What are the **primary business goals** your company has for Generative AI usage? *Select up to 3 options.*




What are the top reasons **preventing your company from moving faster with Generative AI -** i.e., reasons holding your company back from adopting more Generative AI tools/applications in additional use cases? *Select up to 3 reasons.*



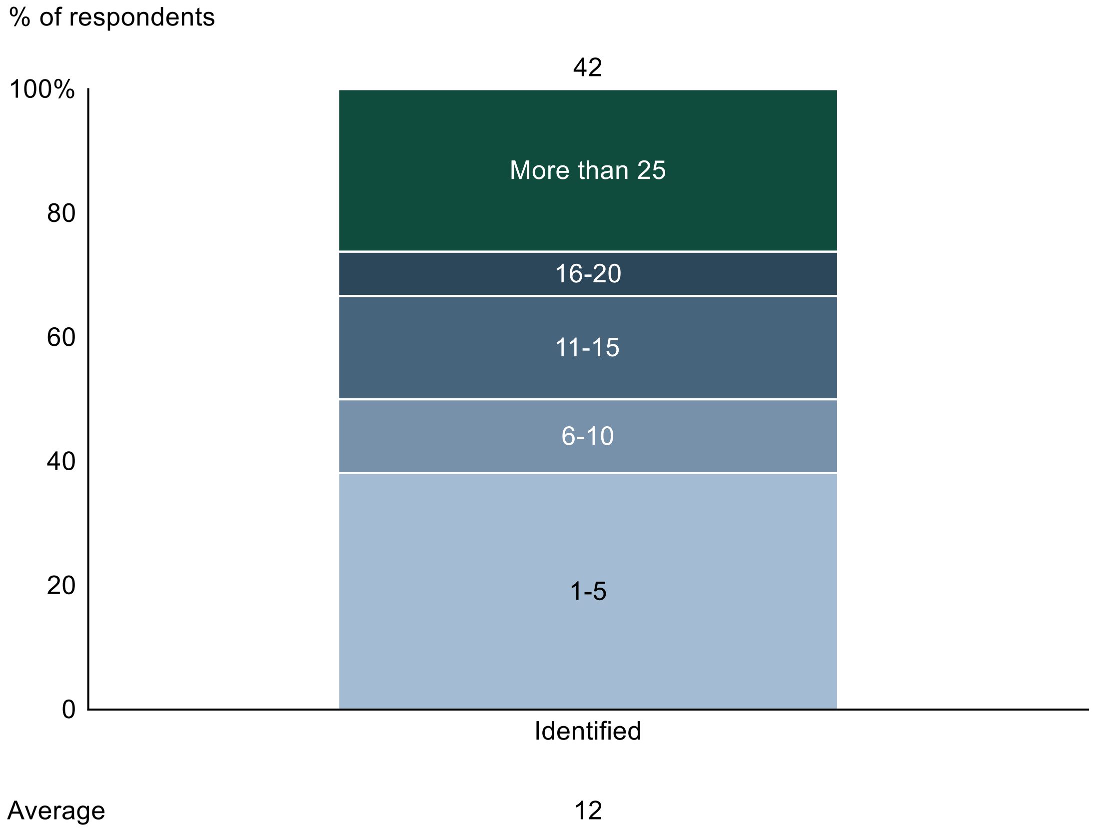

**The most common goals are increasing productivity and growing revenue**

**The largest concerns are data security and privacy concerns, lack of expertise and resources and unproven ROI of GenAI**

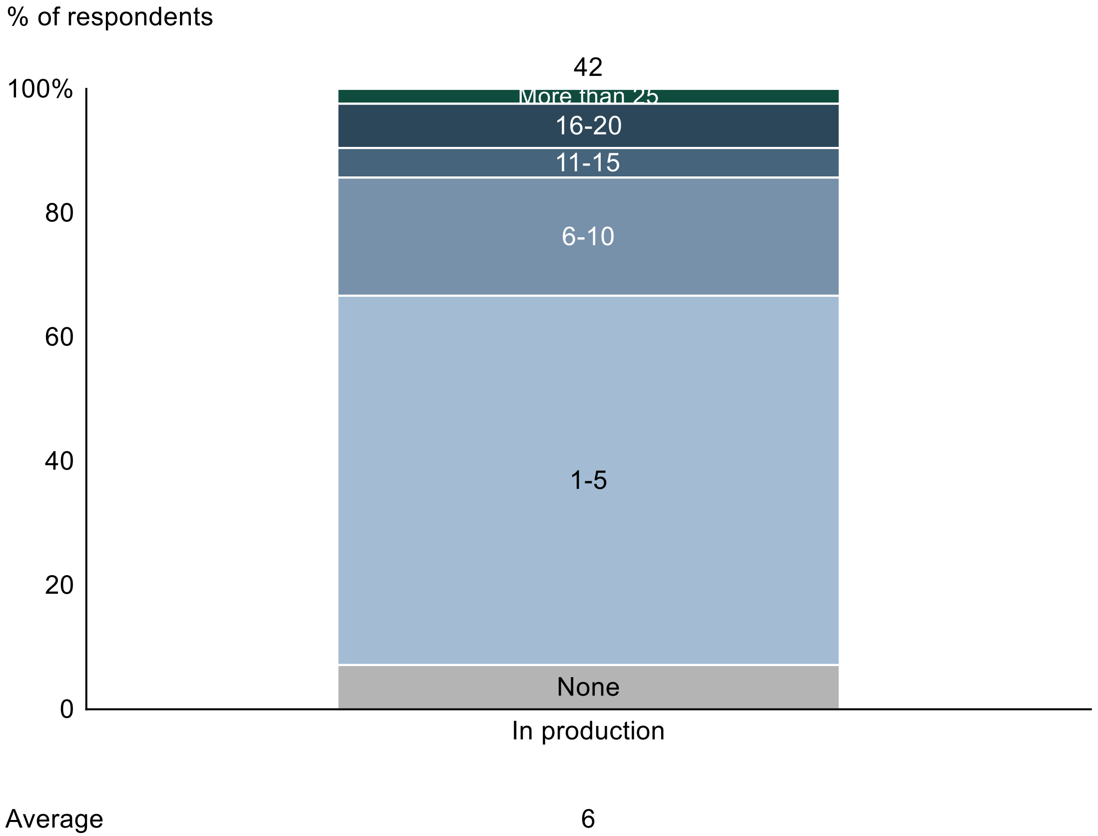
Note: "I don't know" and "Other" responses hidden; LHS: shown same set of key reasons as for previous surveys; RHS: reasons with less than 10% hidden
Source: Project GenAI (N=44)

# There is a wide dispersion in the number of use cases identified, though most firms have less than 6 in production

How many use cases has your company **identified** (e.g., scoped and sized, not just ideated) for GenAI?



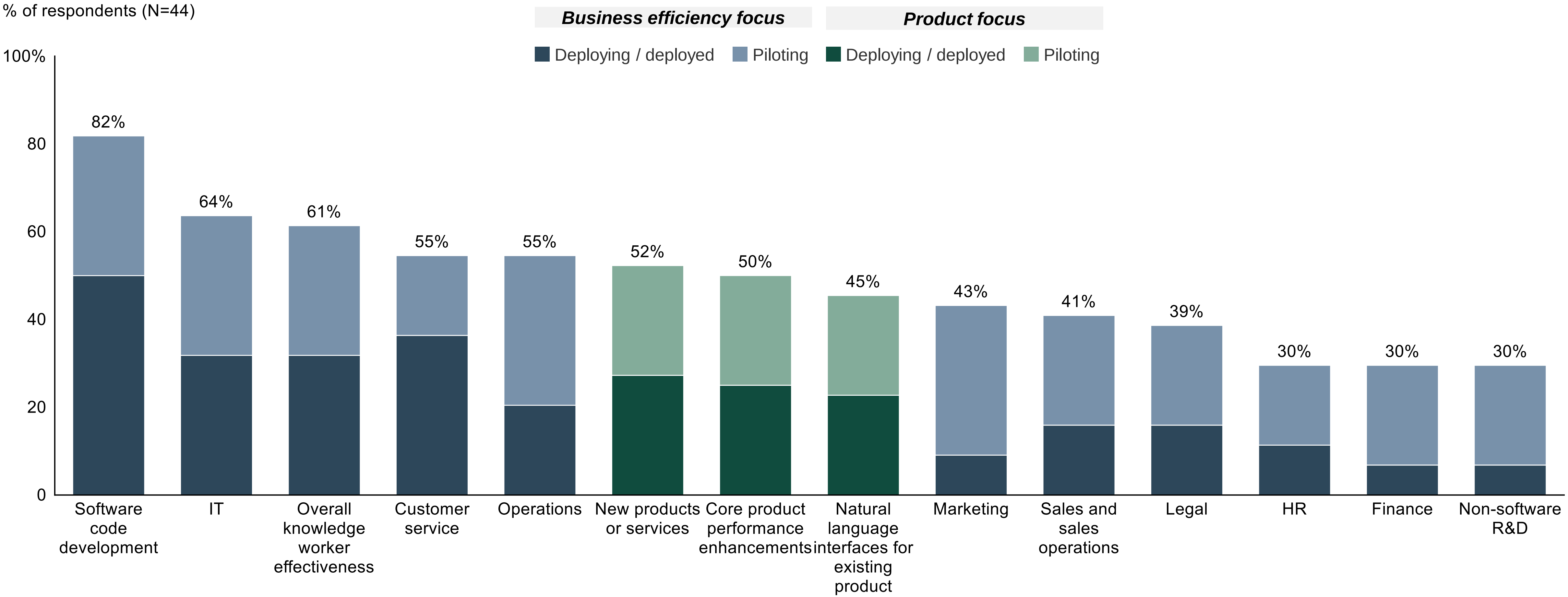

How many GenAI applications are **in production**?




Note: "I don't know" responses hidden
Source: Project GenAI (N=44)

# Firms continue to explore a wide range of AI use cases, with software code development and IT leading, followed by overall worker effectiveness

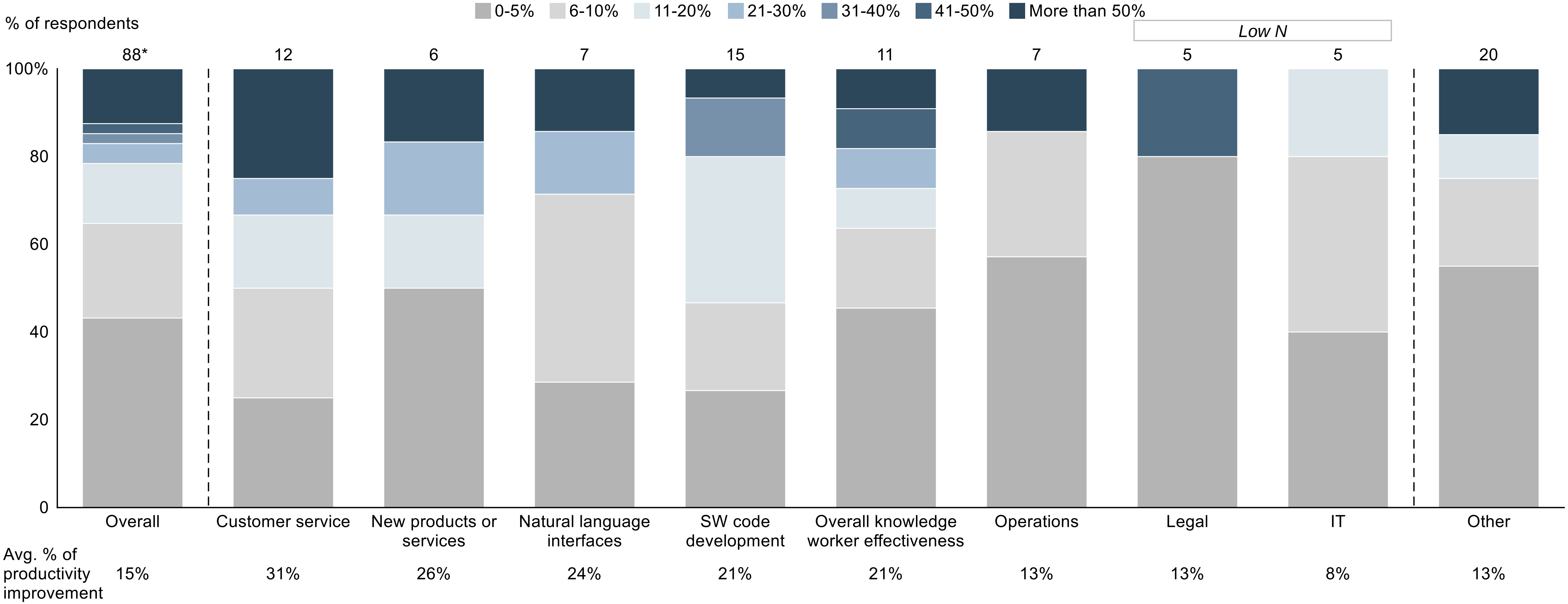
For which use cases or domains has your company **adopted or is considering adoption of Generative AI**?




Note: "Other" responses hidden
Source: Project GenAI (N=44)

# On average, companies estimate a ~15% productivity improvement from deploying GenAI use cases

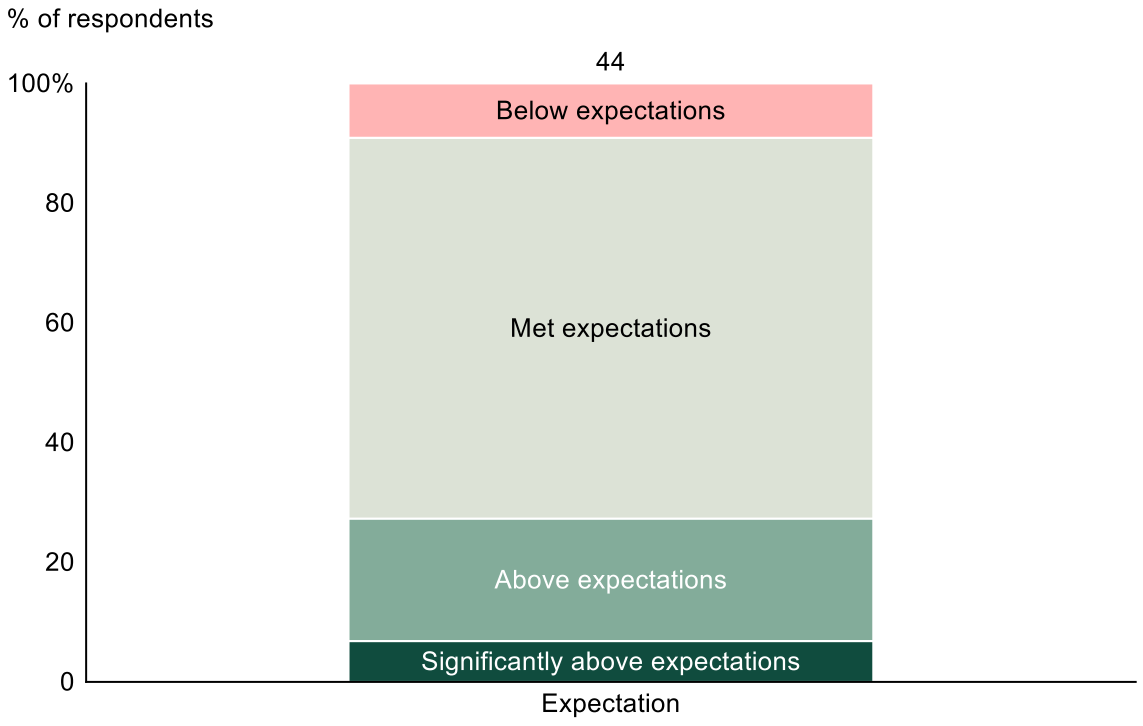
What has been the measurable, attributable **impact** of those **use cases** on the **bottom line** (increased revenue, decreased costs) in that domain at your company?




Note: * - N of responses; categories with N<5 aggregated in "Other" bar
Source: Project GenAI (N=44)

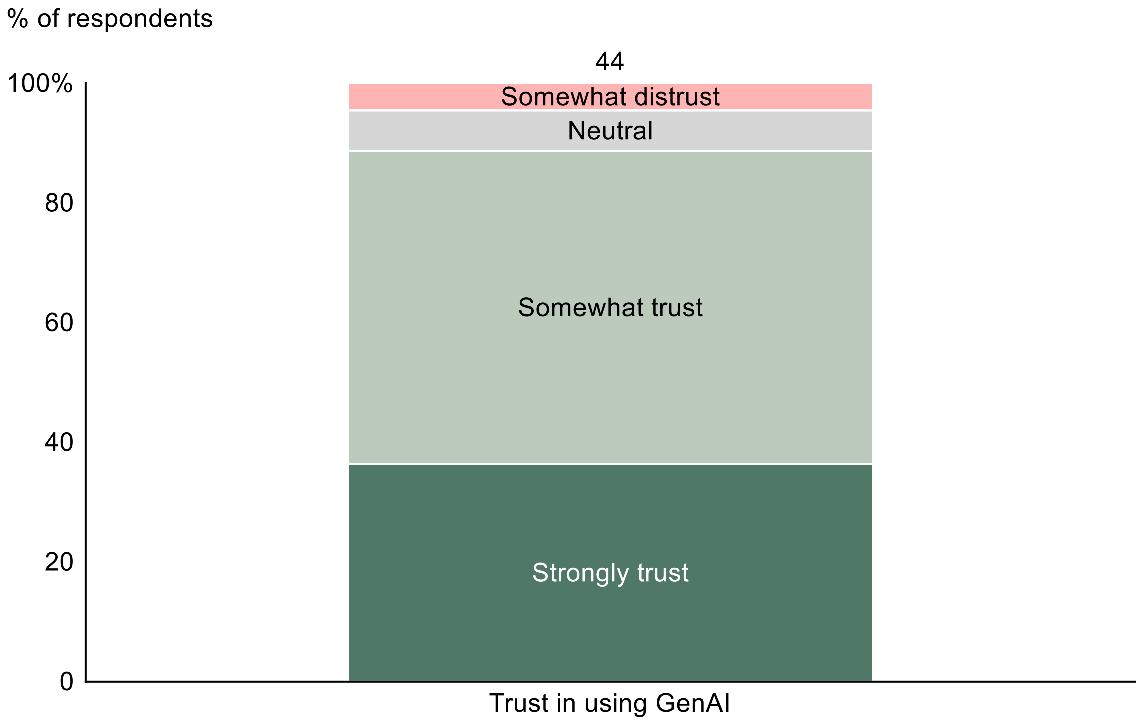
# Nearly all firms report that GenAI met or exceeded expectations; same share of employers have trust that employees use or will use AI

For the GenAI products your company has rolled out, the **impact** has been...




**GenAI met / exceeded expectations in ~90% of instances across use cases**

How much do you **trust** that **your employees** are using or will use AI?

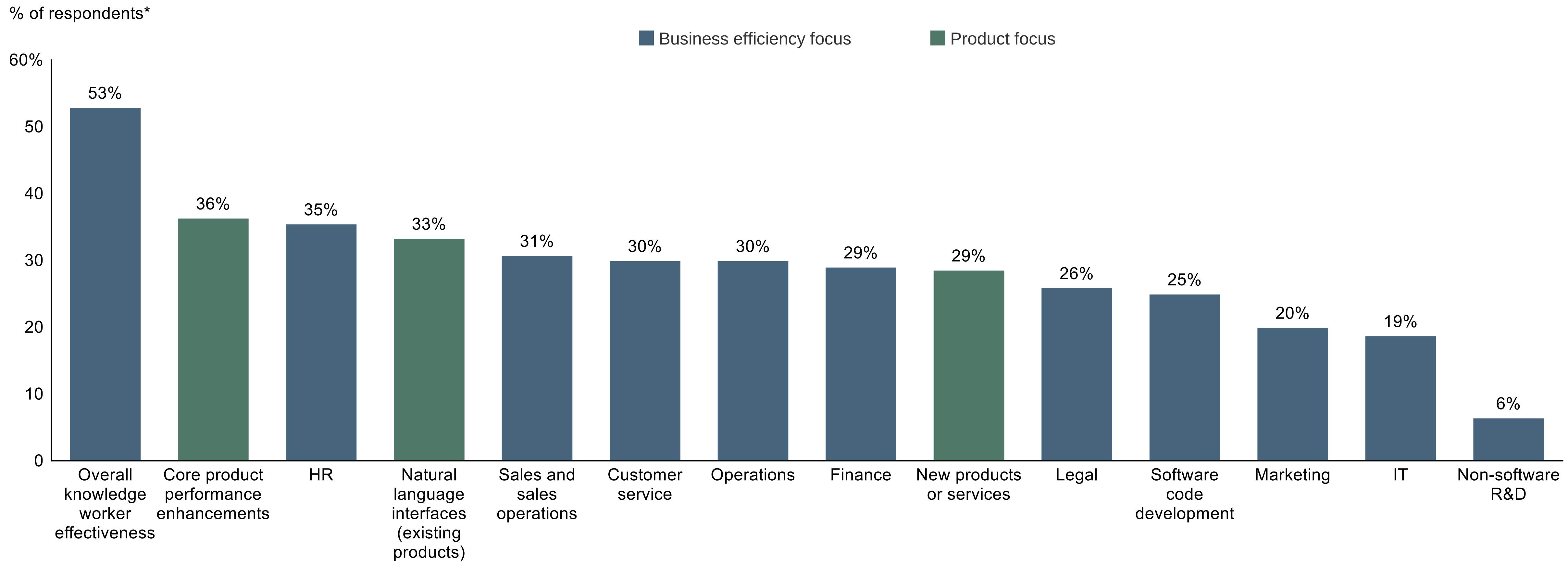



**GenAI with ~90% of trust that employees will or already use it**

Source: Project GenAI (N=44)

# Knowledge worker effectiveness is the most top of mind use case to build around in the upcoming year, followed by product performance enhancements

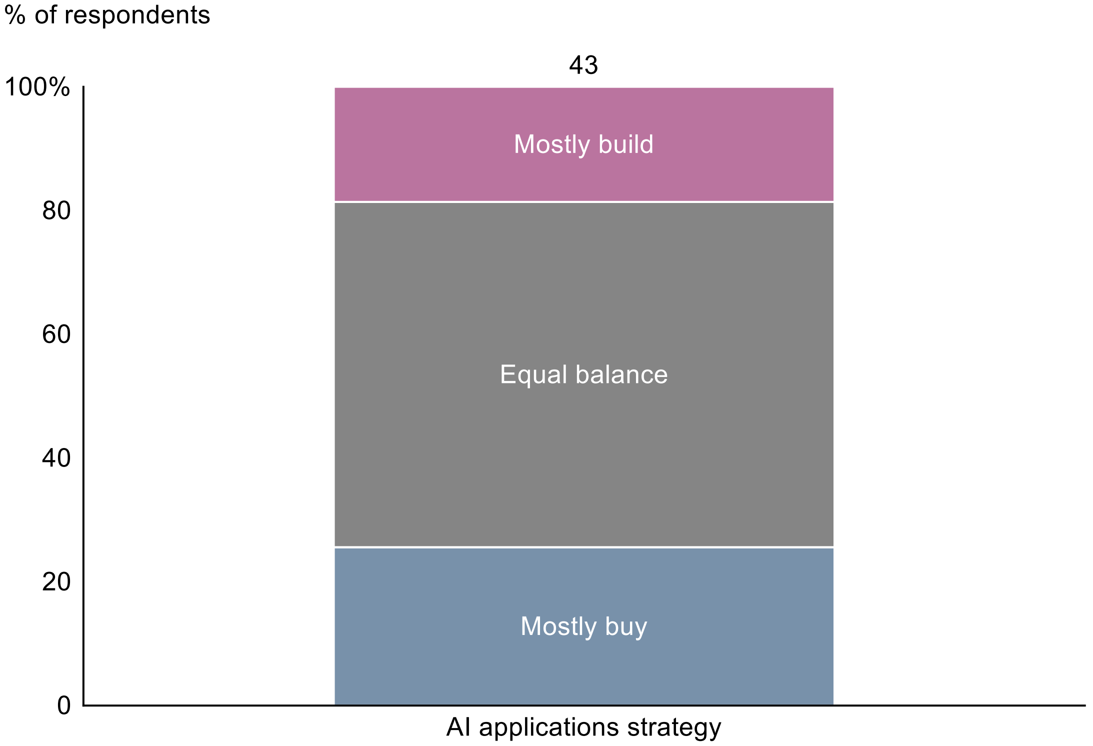
What **areas of your business** do you expect to utilize GenAI tools in the **next year that you haven't already**? *Select up to 3 options*.




Note: "Other" responses hidden; * - N of respondents varies across areas
Source: Project GenAI (N=44)

# As companies scale AI use cases, most firms expect to have a mix between building in-house and buying vended solutions

As you think about **applications integrating AI** over the next 3 years, are you more likely to rely on **building your own AI** applications, or **buying AI** applications?



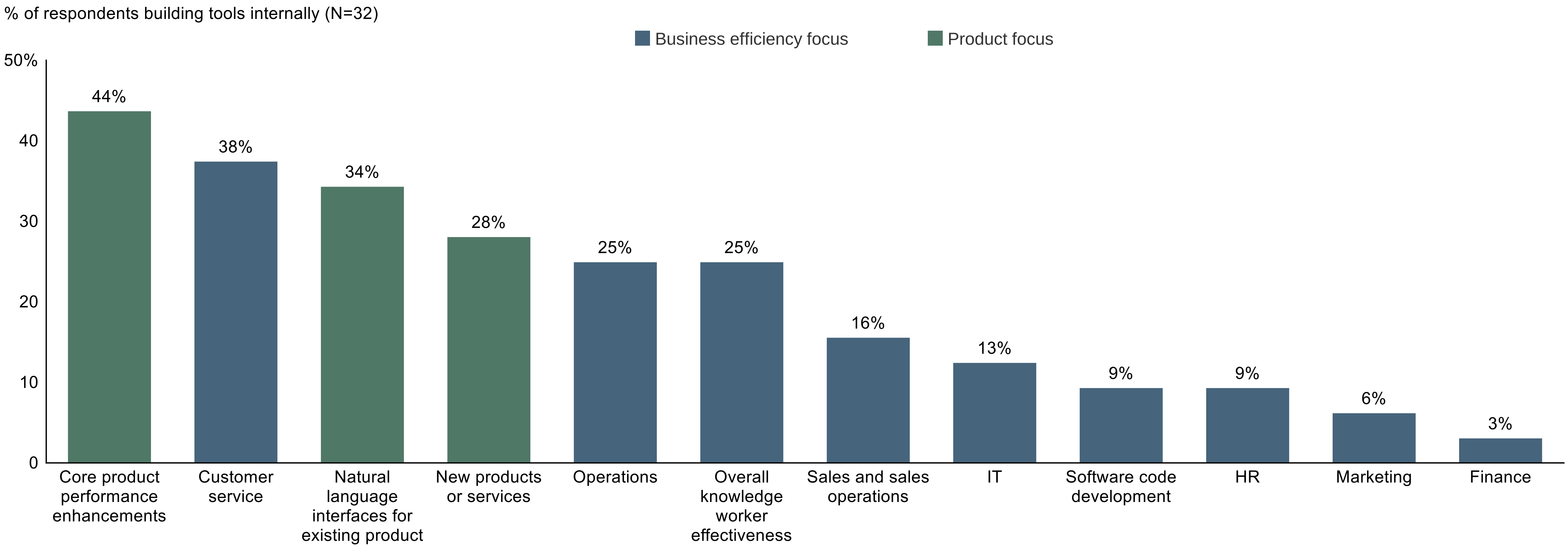

Note: "I don't know" responses hidden
Source: Project GenAI (N=44)

Can you provide 1-2 sentences about **why this** would be / this is your **strategy**?

| ***Mostly build*** |
| --- |
| *"We want to be able to **differentiate our products in market** vs. our competition so need to have something built on top of foundational models available to everyone."* |
| *"We are in the business of **GenAI** as **our core product** or service."* |
| ***Equal balance*** |
| *"**Build** for broadly applicable uses **to manage cost**, **buy** for **vertical use cases**."* |
| *"**Buying internal tools** because others will be the experts, **developing solutions for customers** because we are the **experts**."* |
| *"We will **buy solutions** for **specific functions** that require heavy external / functional context (e.g. legal) and **build for** ones that require **more internal** and **product specific context** (e.g. customer service)."* |
| *"We have to **buy the best tools**. But in **our product category** there aren't many players that are forward-leaning as us, which means we also have to **build**."* |
| ***Mostly buy*** |
| *"Tools are evolving, and **it is not clear** where we will need to build tools."* |
| *"We think **off the shelf products are the way to go**. We want to **avoid technology debt**, and the landscape is changing fast. Also, we are not a software company!"* |
| *"**Not our core expertise.** We want to buy expert solution."* |
| *"Doing a **more 'buy' than build will allow us to get to market faster** and not be burdened with keeping up. Even though we will do mostly buy, we will still be responsible for much of the orchestration / configuring."* |

# Internally built use cases typically skew toward areas touching the product or customers

What types of tools are you **most likely to build internally**? *Select up to 3 options*.




Note: "Other" responses hidden
Source: Project GenAI (N=44)

AGENDA

Strategy and use cases

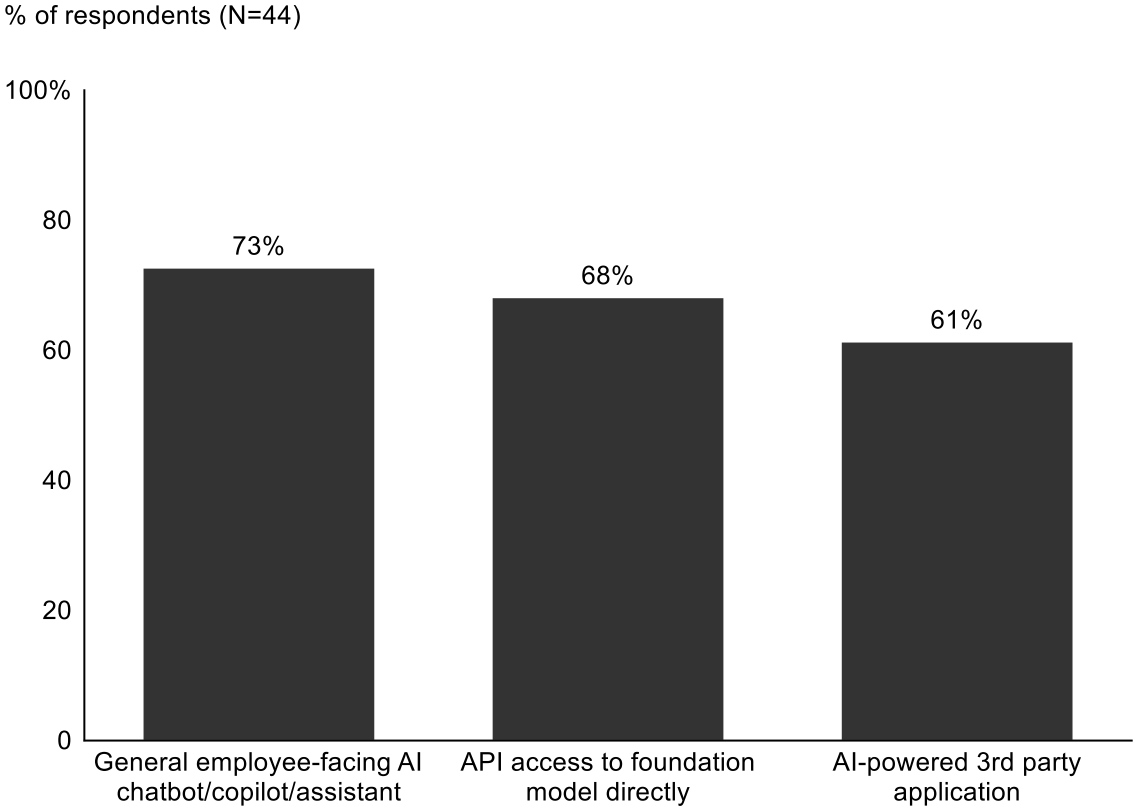
**Vendors and platforms**

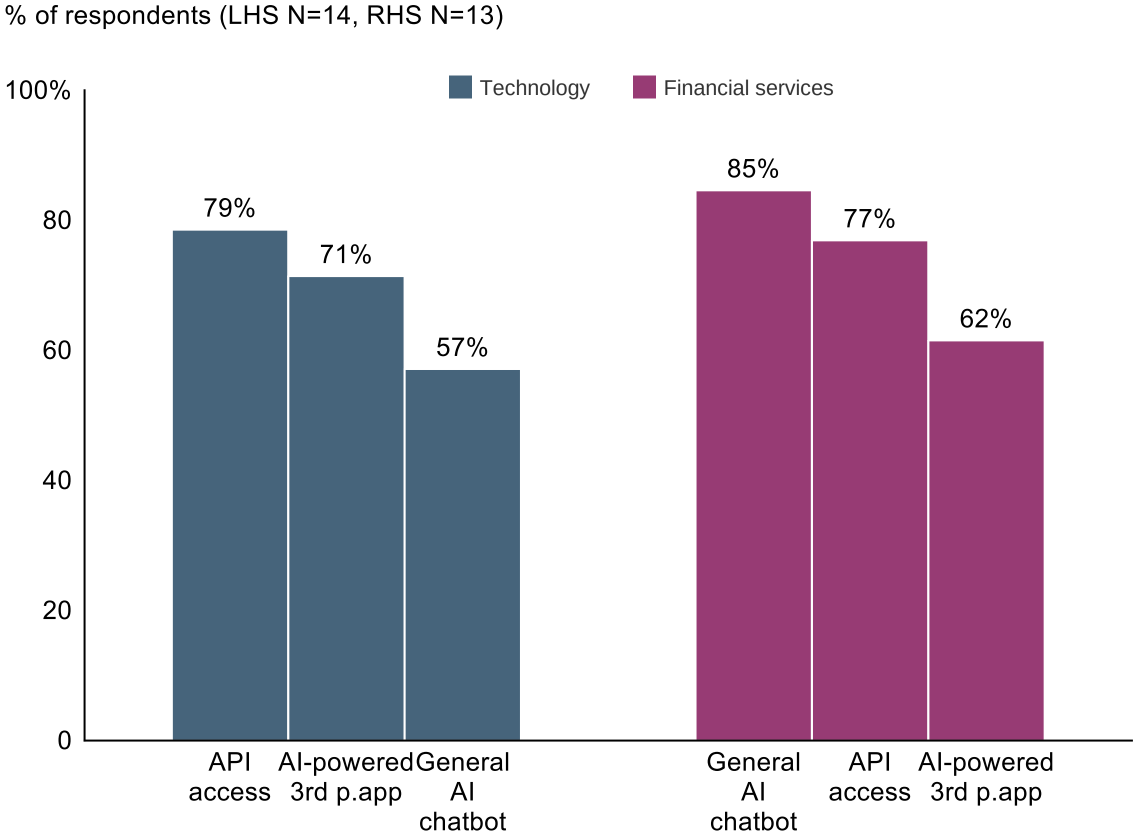
Purchasing and budgeting

Other

# ~75% of respondents purchase general employee-facing AI assistant; ~70% invest in direct access to foundation models

Which of the following AI solutions does your company **currently** purchase? *Select all that apply*.



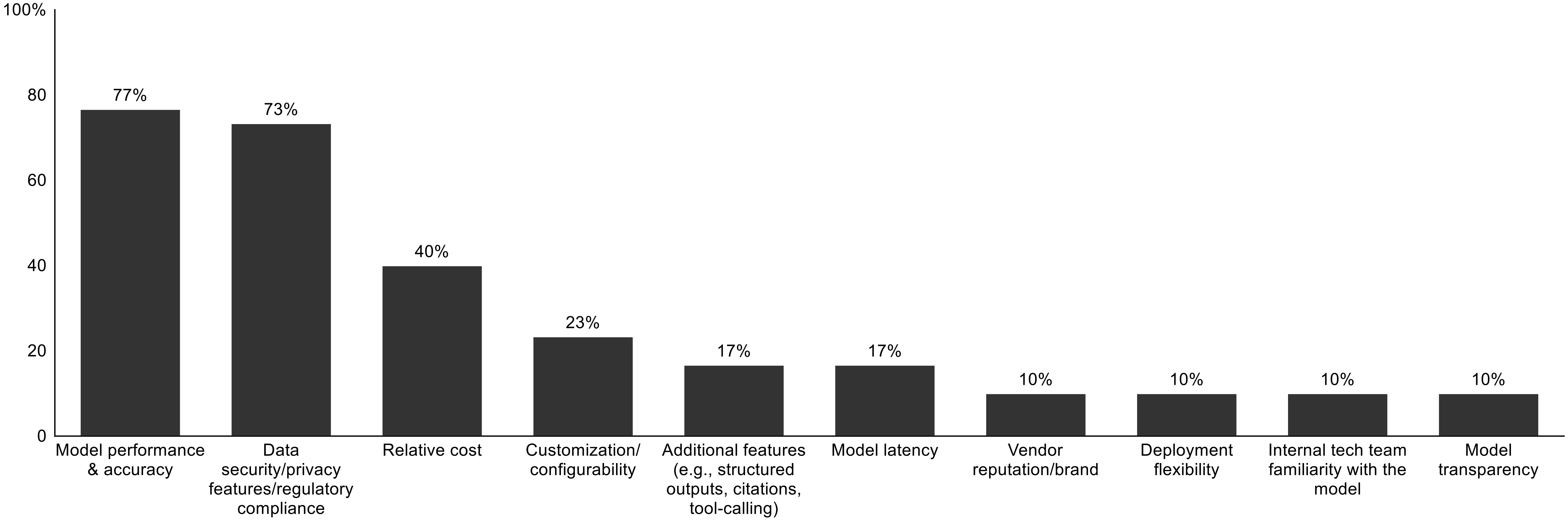

Note: "Other" and "None of the above" responses hidden
Source: Project GenAI (N=44)

AGENDA

# Model performance and accuracy is the top criterion when selecting foundation models, followed by data security, privacy, and compliance

When selecting **foundation models** to use at your company, what factors are most important to you? *Select up to 3 options*.

% of respondents using API access to foundation model directly (N=30)

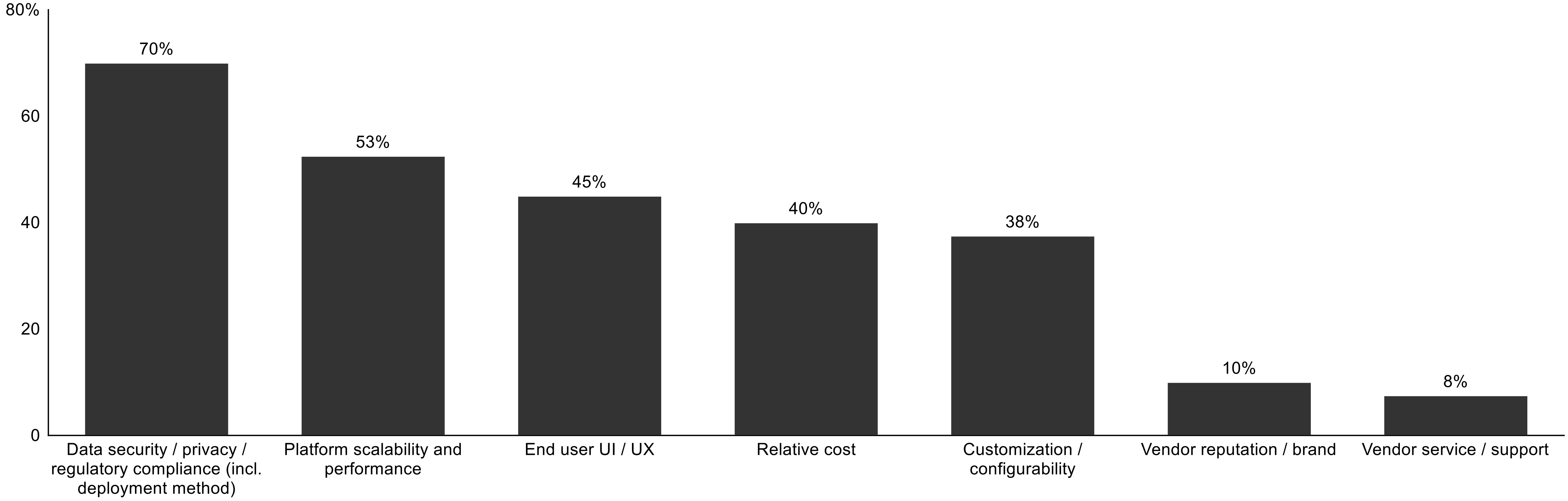



Note: "Other" and options with N=0 are hidden
Source: Project GenAI (N=44)

# Data security and privacy is the primary consideration when selecting user-facing AI apps, with scalability and performance being 2nd most important criterion

When selecting **user-facing AI applications** to use at your company, what factors are most important to you? *Select up to 3 options*.

% of respondents selecting user-facing AI applications (N=40)

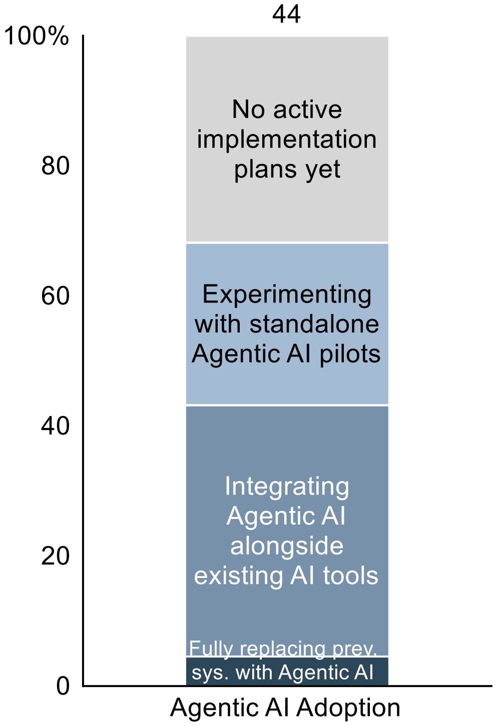



Note: "Other" responses hidden
Source: Project GenAI (N=44)

# There is high hope to integrate AI agents into business processes, though very few firms will pivot toward 'agent only' infrastructures

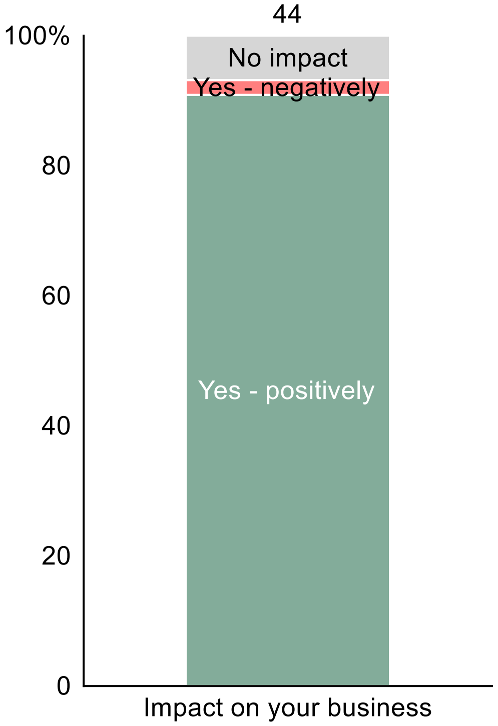
How is your company approaching **Agentic AI adoption** in relation to your **existing AI stack**?

% of respondents



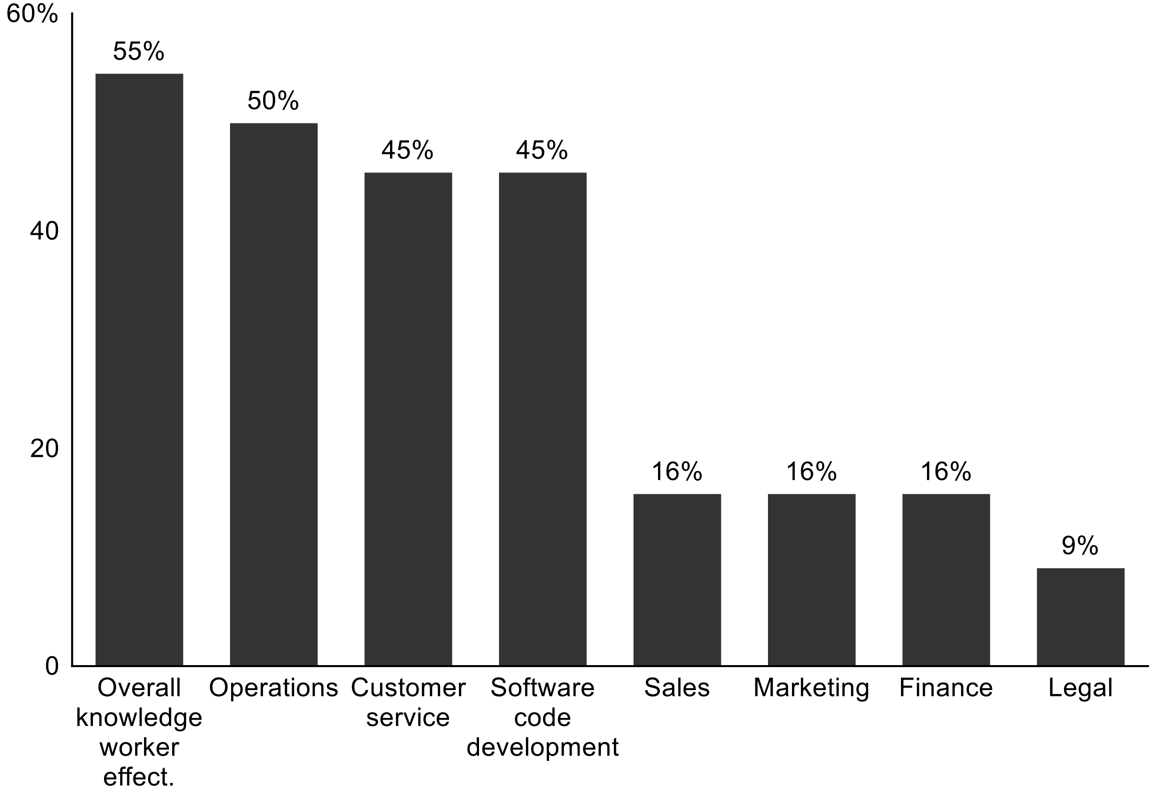

Do you think **AI agents** will have an impact on your business?

% of respondents




Where are **AI agents** most likely to add the **most value** to your business? *Select up to 3 options*.

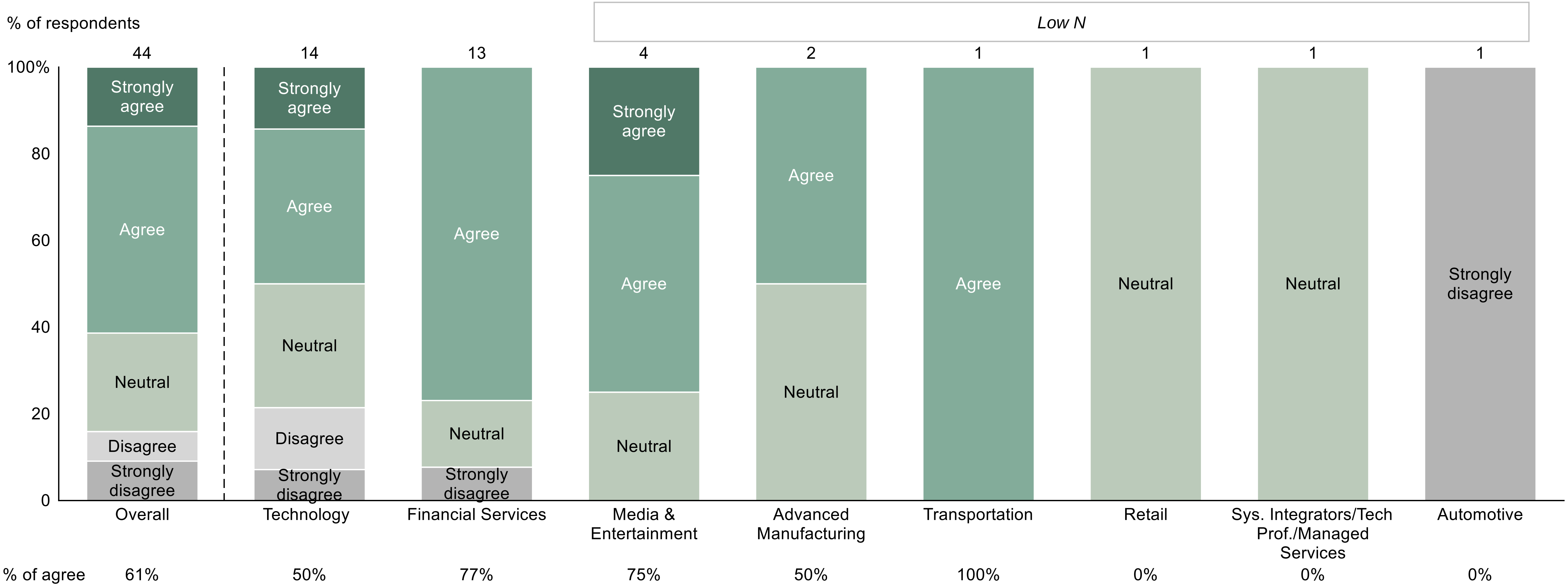
% of respondents (N=44)




Source: Project GenAI (N=44)

# ~60% of respondents' organizations have a defined budget for AI

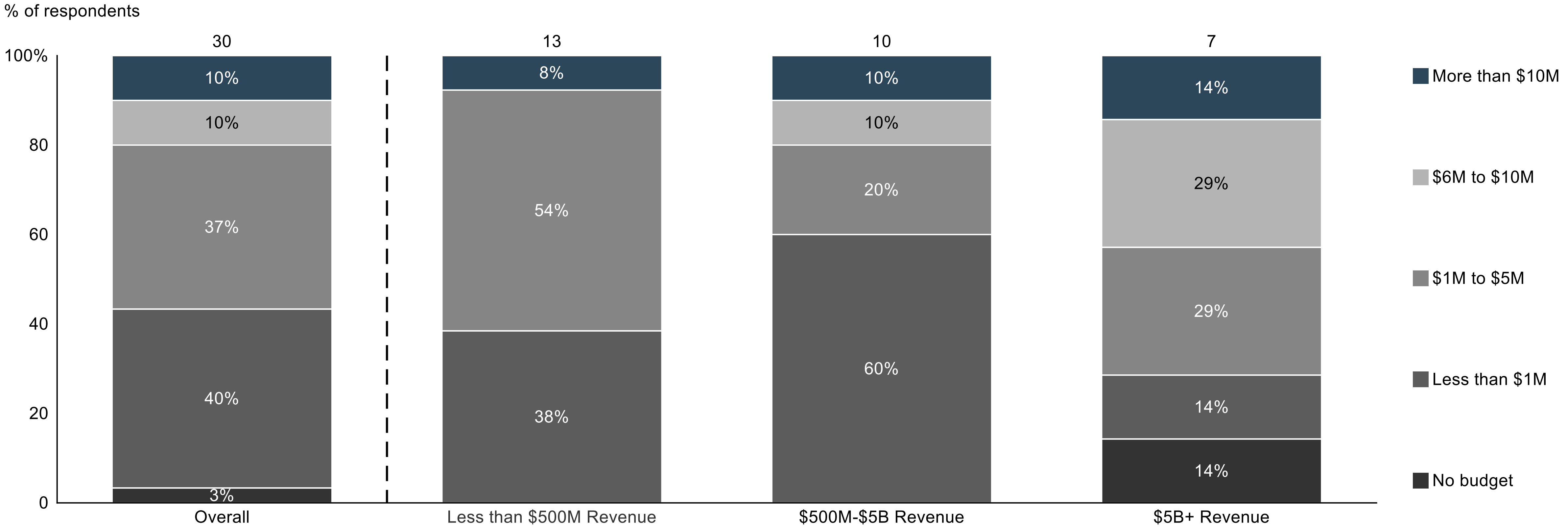
Please indicate your level of agreement with the following statement: "*My **company has a clearly defined GenAI budget** for the current fiscal year*."




Note: "Other" responses hidden
Source: Project GenAI (N=44)

# Company budgets for GenAI specifically vary by size

What is the **approximate size of your company's annual budget** for Generative AI related activities and supporting infrastructure?
What is your organization's **current revenue**?

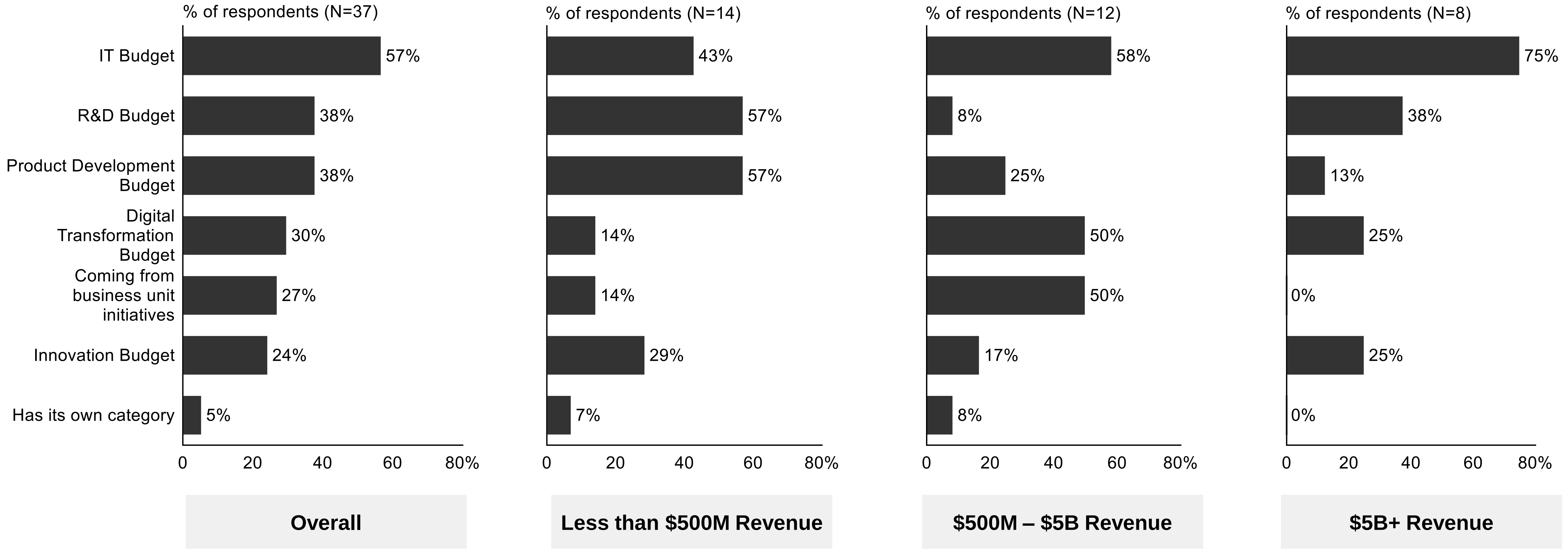



| Average ($M) | $4M | $3M | $3M | $5M |
|---|---|---|---|---|

Note: Excluded respondents who answered "Prefer not to answer" in company’s revenue question, "I don’t know" responses hidden
Source: Project GenAI (N=44)

# Most GenAI funding comes out of IT budgets, with secondary inputs from R&D and Product development

Where does your company's **GenAI budget** come from?
What is your organization's **current revenue**?

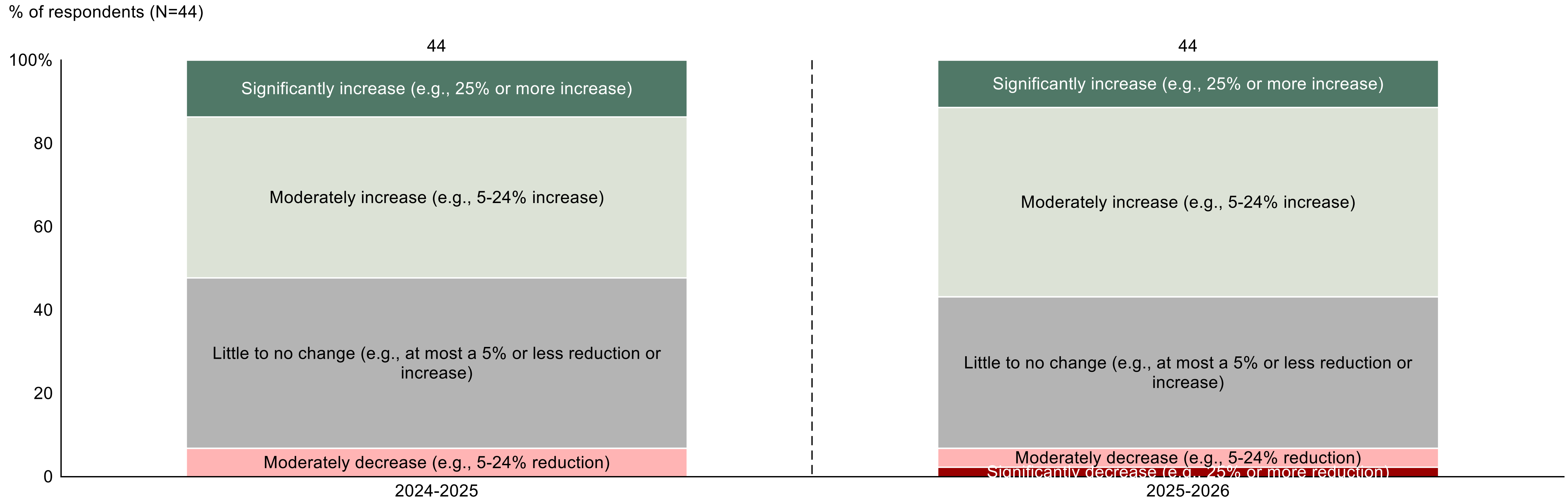



Note: "Other" and "I don't know" options hidden
Source: Project GenAI (N=44)

# Companies anticipate spending on IT to remain the same or moderately increase in 2025 and 2026

How do you expect your spending on IT to trend in **2025 vs. 2024**?

How do you expect your spending on IT to trend in **2026 vs. 2025**?




Source: Project GenAI (N=44)

AGENDA

Strategy and use cases

Vendors and platforms

Purchasing and budgeting

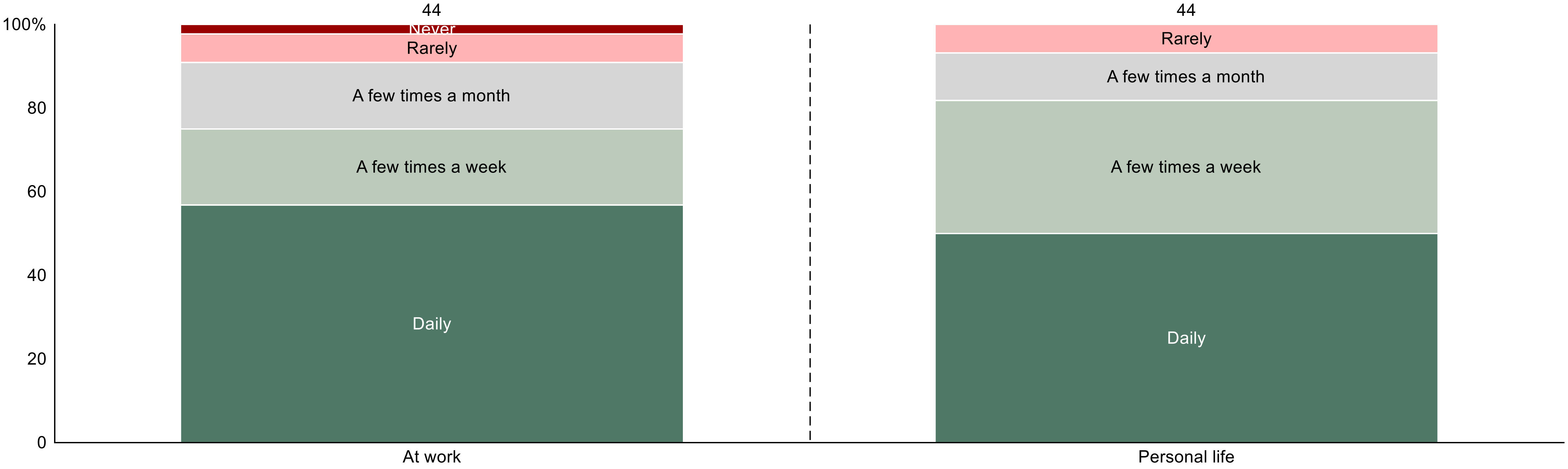
**Other**

# Leaders of firms taking survey are heavy users of AI both in personal life and at work

How often do you use GenAI at **work**?

How often do you use GenAI in your **personal life**?

% of respondents (N=44)




| | At work | Personal life |
|---|---|---|
| Average (per week) | 4.7 | 4.6 |

Source: Project GenAI (N=44)

BAIN & COMPANY