

Business Outlook Survey: GenAI

Q4 2025

eden
mccallum



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Executive Summary

OVERVIEW

- Eden McCallum's semi-annual Economic and Business Outlook Survey was conducted from 14-21 November 2025, with HighPoint Associates
- We surveyed 329 business leaders from across the globe, with a focus on the UK, Netherlands and US (Eden McCallum's and HighPoint's offices)
- Our sample respondents work across a broad range of industries within companies of varying sizes and ownership models

VIEWS AND ADOPTION OF GENERATIVE AI CURRENTLY

- Nearly 1/3 believe that GenAI is already (very) significantly impacting their business; with over half seeing that impact as positive, though c. quarter as mixed; non-American business leaders are generally more positive about the impact of GenAI than their American counterparts
- GenAI activity has increased sharply since 2023 – 2/3 are now exploring/experimenting with use cases; >50% training staff; average number of actions being taken has gone from 2.4 to 4.0
- 50% of business leaders have derived value from GenAI through cost reduction and c. 1/3 in enhanced decision making and improved customer experience. Companies are typically using / piloting AI in multiple functional areas, particularly marketing / communications and customer service

EXPECTATIONS ABOUT GENERATIVE AI IN THE FUTURE

- Looking forward, c.80% expect the impact of GenAI on their businesses to be (very) significant (up from 1/3 now), a view shared consistently geographically
- Business leaders also expect significant value generation from GenAI in the next 1-3 years across all areas, and particularly in cost reduction, enhanced decision making and improved customer experience

VARIANCES BY COMPANY TYPE

- Size of company: Companies of all sizes report similar impact from GenAI now, but smaller companies are more positive on that impact. However, they are less likely to be undertaking GenAI actions of all types and across different functional areas

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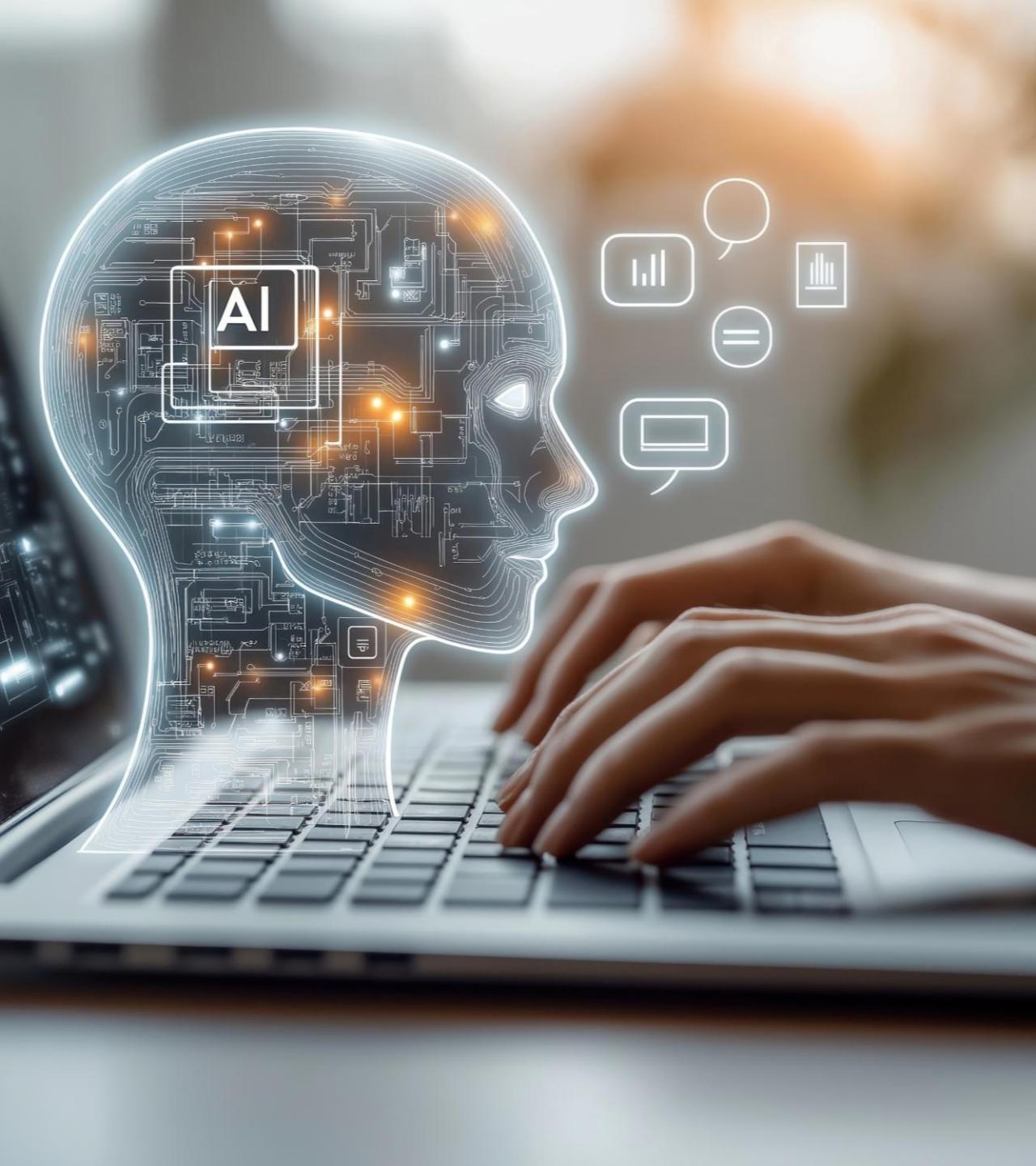
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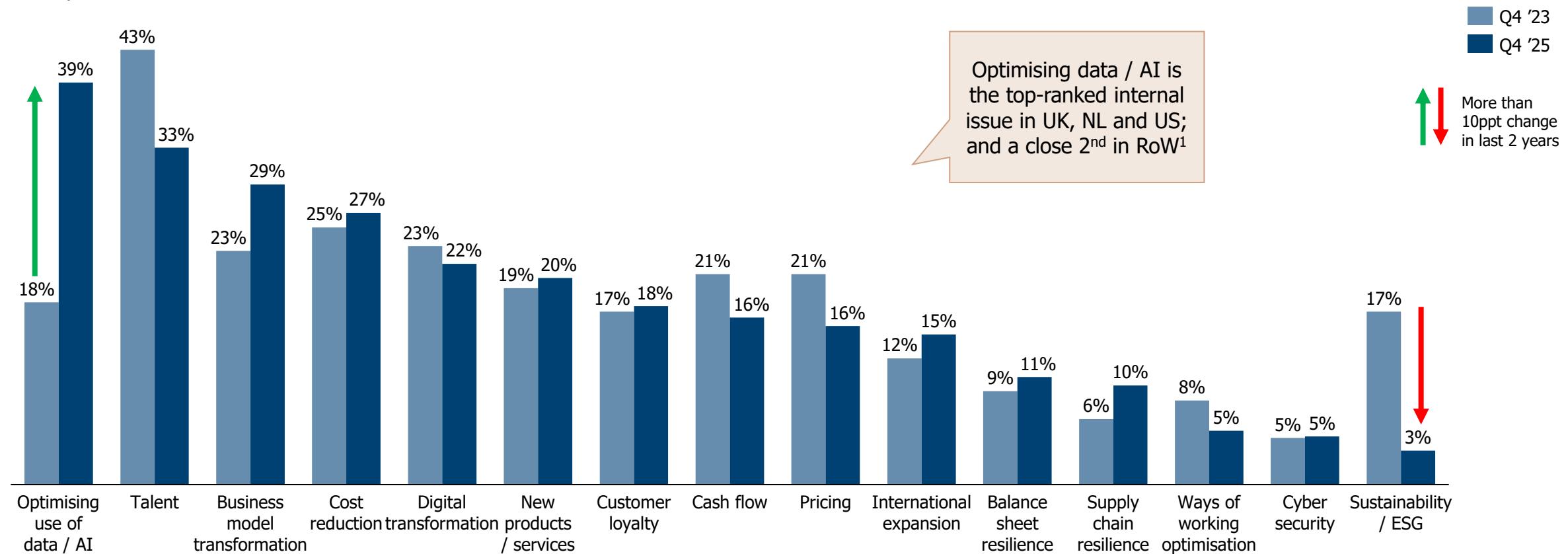
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Data / AI has jumped in importance to be the key internal issue for businesses over the last 2 years

MOST IMPORTANT INTERNAL ISSUES FOR BUSINESSES (Q4 '23 VS. Q4 '25)

% respondents



Q4 '23 n: 218; Q4 '25 n: 360

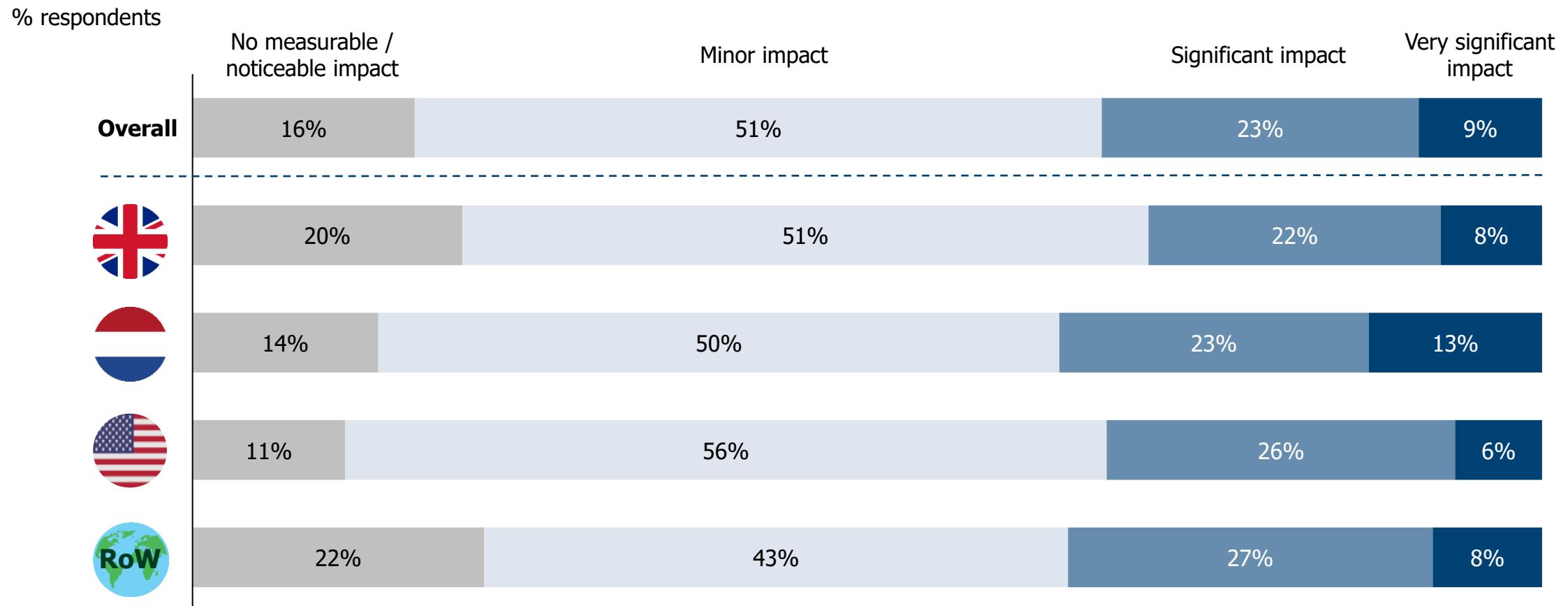
(1) Tied with Talent after Business Model Transformation

Note: Participants could select a maximum of 3 answers. Excludes those who answered 'Other' or 'Don't know'. Sample for Q4 25 has higher representation of US respondents than prior years (33% vs. 7% as last 3 years average). Historic comparisons have been checked by reweighting the sample and no material differences emerged, so the data shows the unweighted sample

Source: Eden McCallum Business Outlook Survey: Q11 - What are the most important internal issues for your company over the next 1-2 years? [Please select up to three]
Business Outlook Survey Q2 2025

Nearly one-third of respondents feel that GenAI has *already* significantly or very significantly impacted their business

DEGREE OF GENERATIVE AI'S IMPACT ON BUSINESS TO DATE (Q4 '25) – BY COUNTRY



Q4 '25 n: 329; UK: n 120; NL: 62; US: 110; RoW: 37

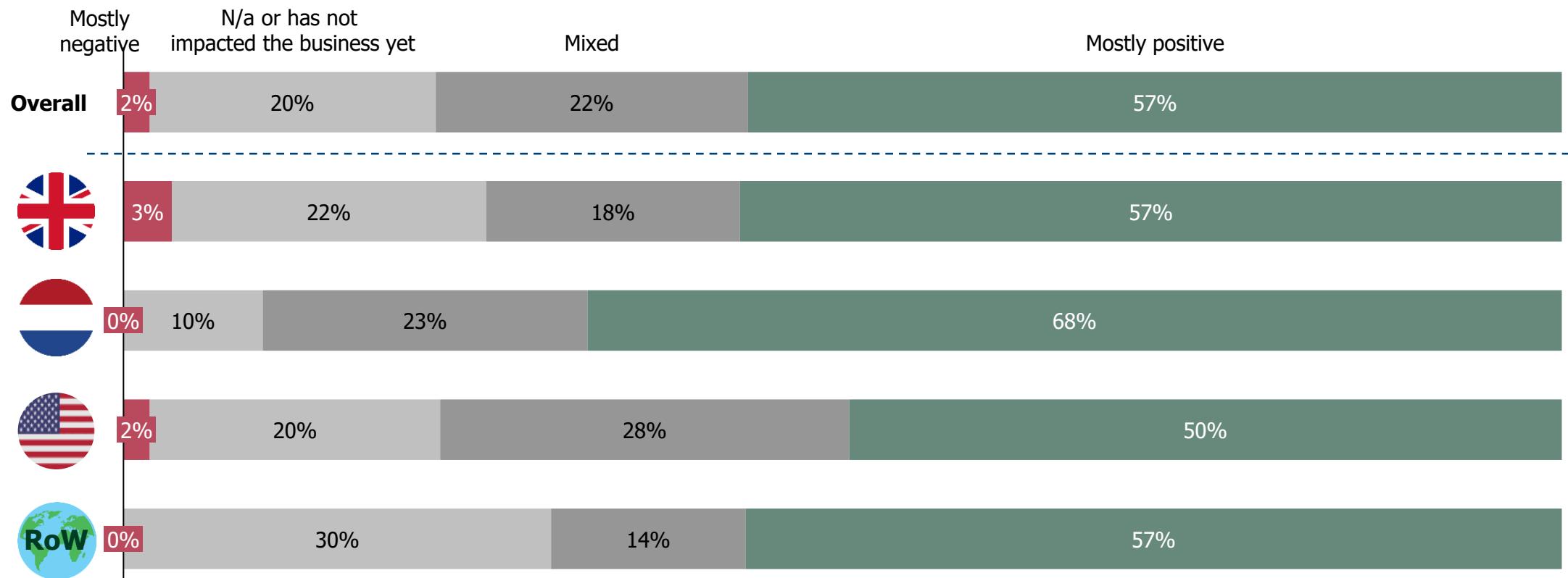
Notes: Don't know responses are excluded

Source: Eden McCallum Business Outlook Survey Q18 – To what extent has generative AI impacted your business thus far? Q3 – In which country do you live?

Over half of business leaders feel that the impact of GenAI on their business has been positive, particularly those outside the US

NATURE OF GENERATIVE AI'S IMPACT ON BUSINESS TO DATE (Q4 '25) – BY COUNTRY

% respondents



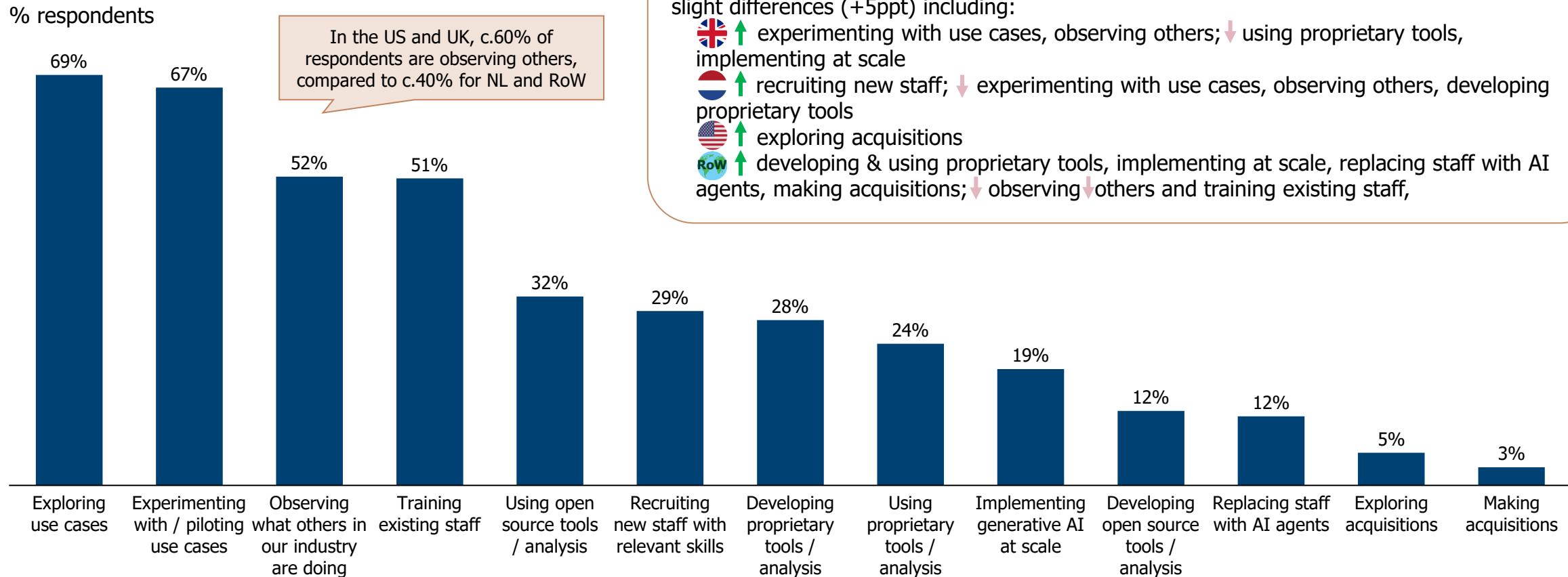
Q4 '25 n: 329; UK: n 120; NL: 62; US: 110; RoW: 37

Notes: Don't know responses are excluded

Source: Eden McCallum Business Outlook Survey Q19 – To the extent AI has impacted your business, has the impact been mostly positive, negative or mixed? Q3 – In which country do you live?

Two-thirds of businesses are currently exploring and experimenting with GenAI use cases

CURRENT ACTIONS (Q4 '25)



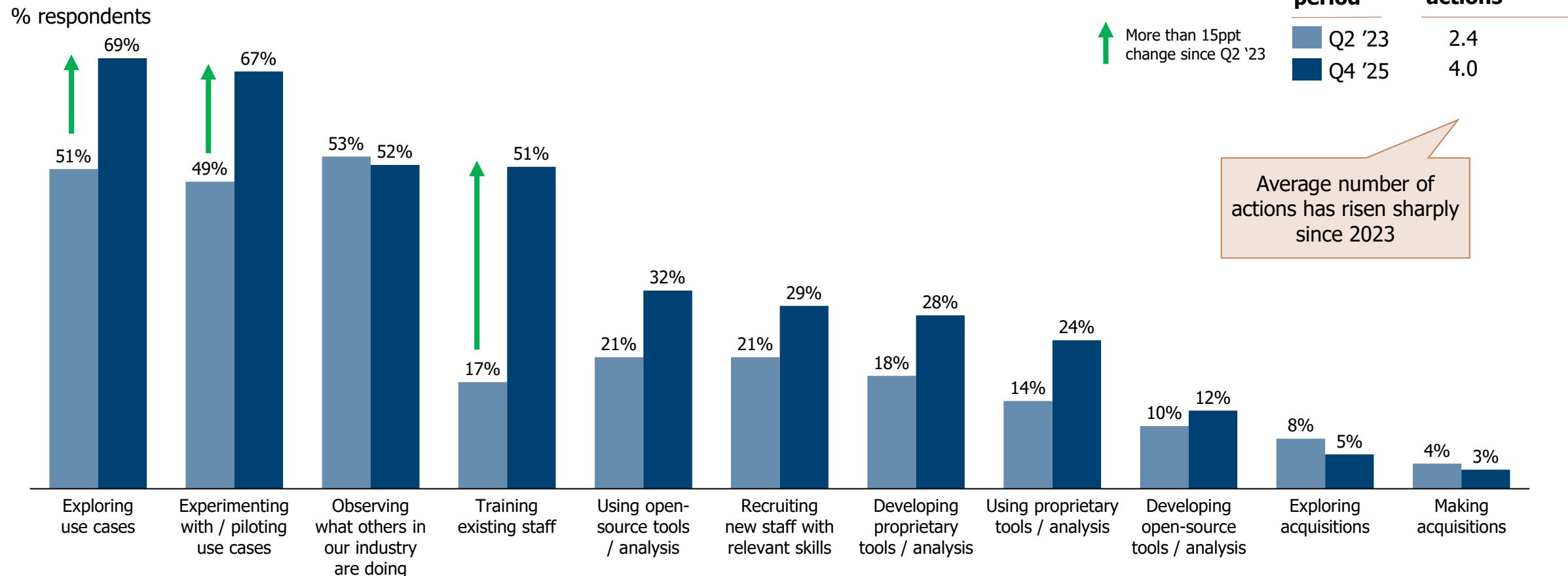
Q4 '25 n: 329 (average of 4.0 actions per respondent)

Notes: Don't know and Other responses are excluded. Respondents could select all that apply; hence percentages do not add to 100%.

Source: Eden McCallum Business Outlook Survey Q20 - What is your company currently doing about / with generative AI? Please select all that apply.

Use of GenAI has increased across almost all areas compared to Q2 2023, with the biggest jumps in exploring/ experimenting with use cases and training staff

CURRENT ACTIONS (Q2 '23 VS. Q4 '25)



Q2 '23 n: 178 (average of 2.4 actions per respondent); Q4 '25 n: 329 (average of 4.0 actions per respondent)

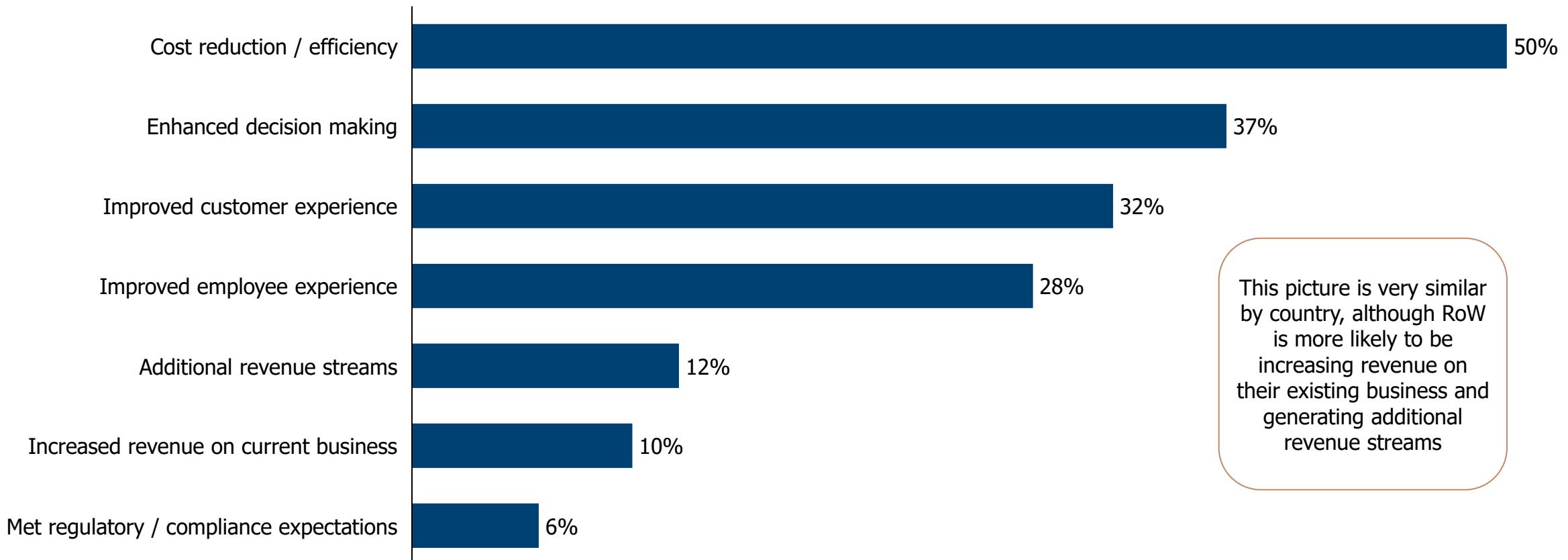
Note: Don't know responses are excluded. Respondents could select all that apply; hence percentages do not add to 100%.

Source: Eden McCallum Business Outlook Survey Q20 - What is your company currently doing about / with generative AI? Please select all that apply.

Half of business leaders have derived value from GenAI through cost reduction; and c. one-third in better decision making and customer experience

VALUE GENERATION FROM GENERATIVE AI TO DATE (Q4 '25)

% respondents



n: 329

Note: Respondents could select all that apply, hence percentages do not add to 100, and don't know responses are excluded. 22% of respondents selected "None – not yet experienced value from AI yet"

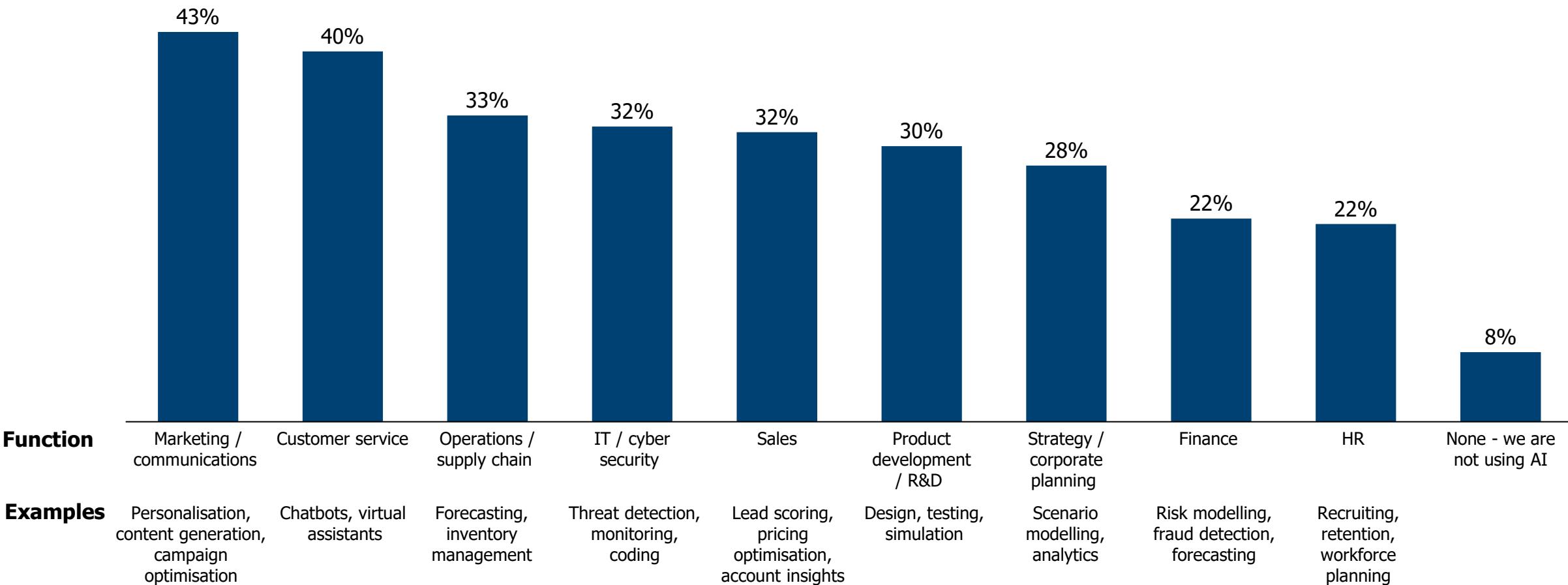
Source: Eden McCallum Business Outlook Survey, Q21 – How has your company generated value from generative AI thus far? Please select all that apply

This picture is very similar by country, although RoW is more likely to be increasing revenue on their existing business and generating additional revenue streams

Use of GenAI is widespread, but most common in marketing and customer service

BUSINESS FUNCTIONS CURRENTLY USING / PILOTING GENERATIVE AI (Q4 '25)

% respondents



n: 329

Note: 1) Respondents could select all that apply, hence percentages do not add to 100, and don't know responses are excluded

Source: Eden McCallum Business Outlook Survey. Q22 – In which business functions are you currently using or piloting AI? [Please select all that apply]

While the top 6 business functions using GenAI are similar across geographies, customer service, operations and sales have notably different rankings / usage

BUSINESS FUNCTIONS CURRENTLY USING / PILOTING GENERATIVE AI BY COUNTRY (Q4 '25)

% respondents

THE UNITED KINGDOM	THE NETHERLANDS	THE UNITED STATES	REST OF WORLD
 Marketing / communications 41%	 Marketing / communications 45%	 Customer service 47%	 Sales 46%
 Customer service 39%	 Operations / supply chain 44%	 Marketing / communications 43%	 Marketing / communications 43%
 Operations / supply chain 31%	 Sales 39%	 Strategy / corporate planning 36%	 Customer service 35%
 IT / cyber security 30%	 Product development / R&D 27%	 IT / cyber security 35%	 Operations / supply chain 35%
 Product development / R&D 27%	 Customer service 34%	 Operations / supply chain 30%	 IT / cyber security 35%
 Sales 25%	 IT / cyber security 31%	 Product development / R&D 30%	 Product development / R&D 30%

UK n: 130; NL n: 126; US n: 71, RoW n: 44

Notes: Participants could select a maximum of 3 answers. Excludes those who answered 'Other' or 'Don't know'.

Source: Eden McCallum Business Outlook Survey: Q22 – In which business functions are you currently using or piloting AI? [Please select all that apply]

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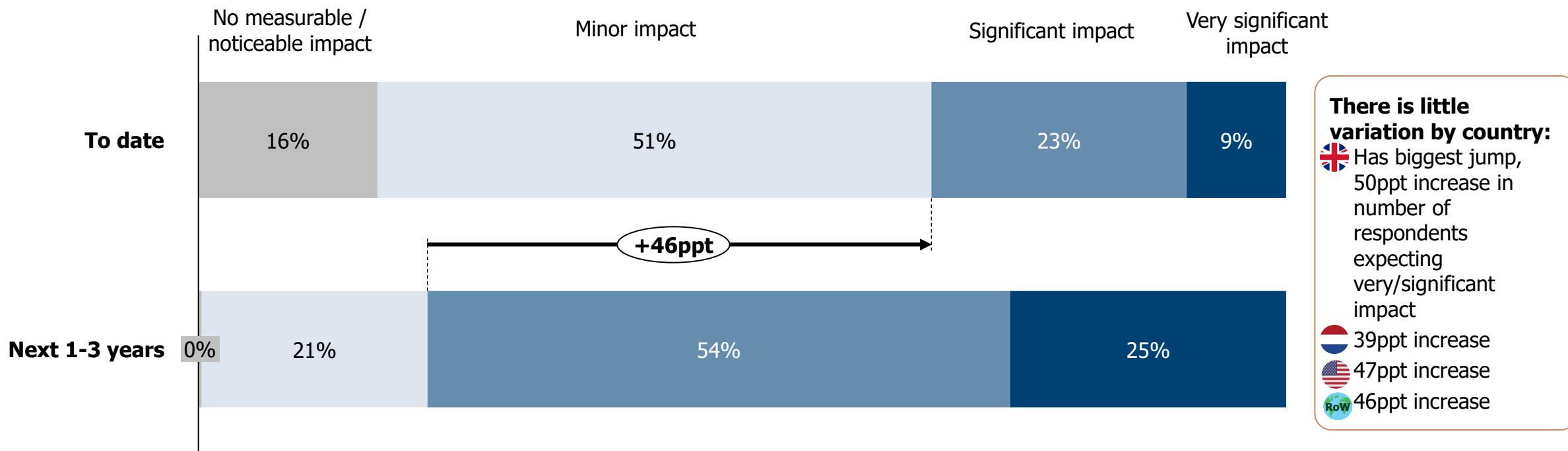
Appendix: Sample details



Leaders overwhelmingly expect GenAI to have significant impact in the next 1-3 years

IMPACT OF GENERATIVE AI ON BUSINESS (Q4 '25): TO DATE VS. EXPECTED (NEXT 1-3 YEARS)

% respondents



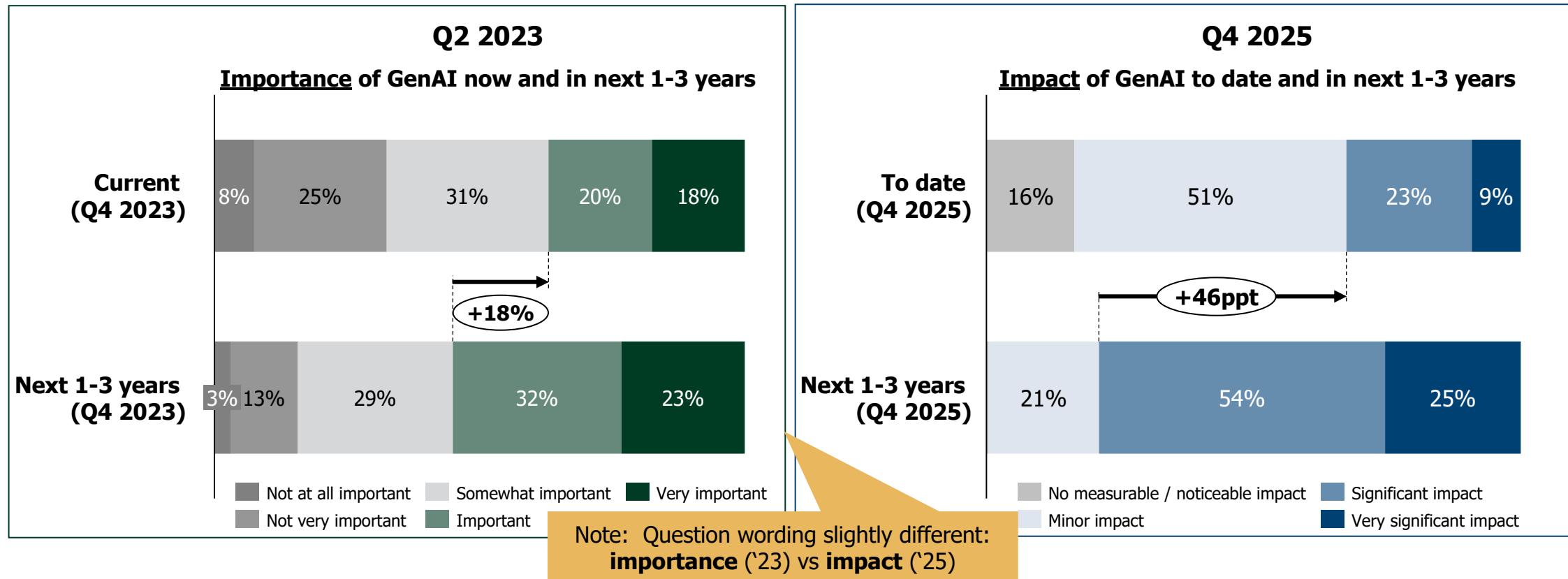
Q4 '25 n: 323

Note: Don't know responses are excluded

Source: Eden McCallum Business Outlook Survey Q18 – To what extent has generative AI impacted your business thus far? Q23 - Now looking to the future, to what extent do you expect generative AI to impact your business / organisation in the future (next 1-3 years)?

Over the past 2 years, expectations about the future importance / impact of AI has increased significantly

IMPORTANCE / IMPACT OF GENERATIVE AI ON ORGANISATION – CURRENT VS. EXPECTED – Q2 '23 VS. Q4 '25



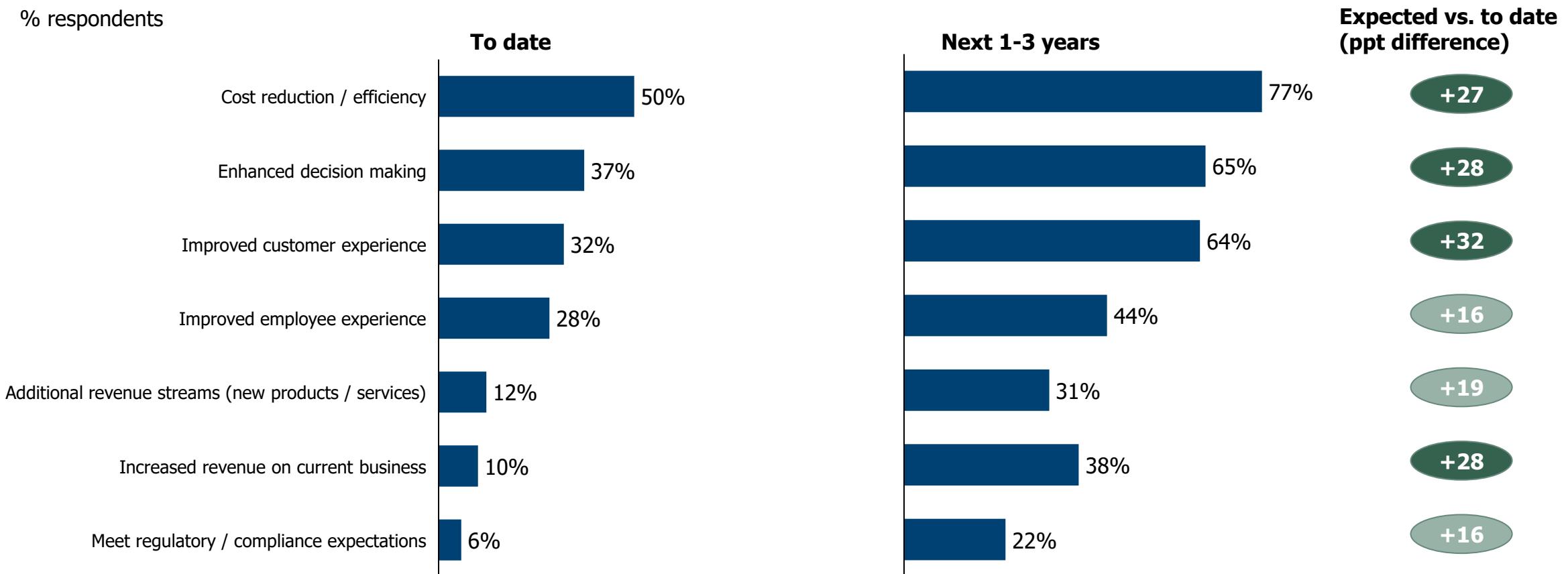
Q4 '25 n: 323; Q2 '23: Current n: 200, Future n: 198

Note: Don't know responses are excluded

Source: Eden McCallum Business Outlook Survey 2025: Q18 – To what extent has generative AI impacted your business thus far? Q23 - Now looking to the future, to what extent do you expect generative AI to impact your business / organisation in the future (next 1-3 years)? ; Eden McCallum Business Outlook Survey 2023: "Thinking now about generative AI, which of the following best describes your company's view of the current importance of generative AI to your business / organisation? And which best describes your company's view on the importance of generative AI to your business / organisation in the future (next 1-3 years)? Both questions with the options of: Not at all important, Not very important, Somewhat important, Important and Very important

Expectations of value generation from GenAI in the next 1-3 years are more widespread, particularly improved customer experience

VALUE GENERATION FROM GENERATIVE AI TO DATE VS. EXPECTED (NEXT 1-3 YEARS) (Q4 '25)



n: 329

Note: Respondents could select all that apply, hence percentages do not add to 100, and don't know responses are excluded

Source: Eden McCallum Business Outlook Survey Q21 – How has your company generated value from generative AI thus far? [Please select all that apply]. Q24 - Still thinking about the future, how does your company expect to generate additional value from generative AI in the next 1-3 years? [Please select all that apply]

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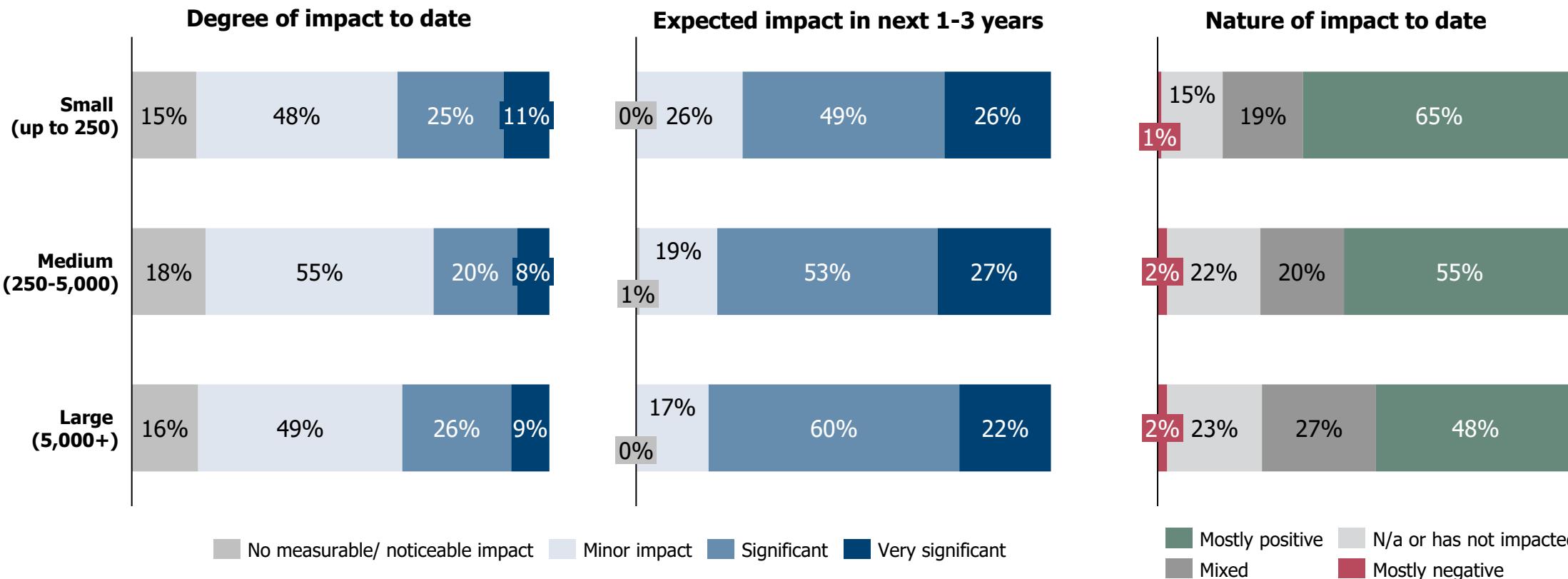
Appendix: Sample details



While the impact of GenAI to date is similar by company size, in the next 1-3 years larger businesses expect greater impact; small businesses feel most positive

IMPACT OF GENERATIVE AI BY COMPANY SIZE (Q4 '25)

% respondents



n: <250: 109; 250-5000: 130; 5000+: 88

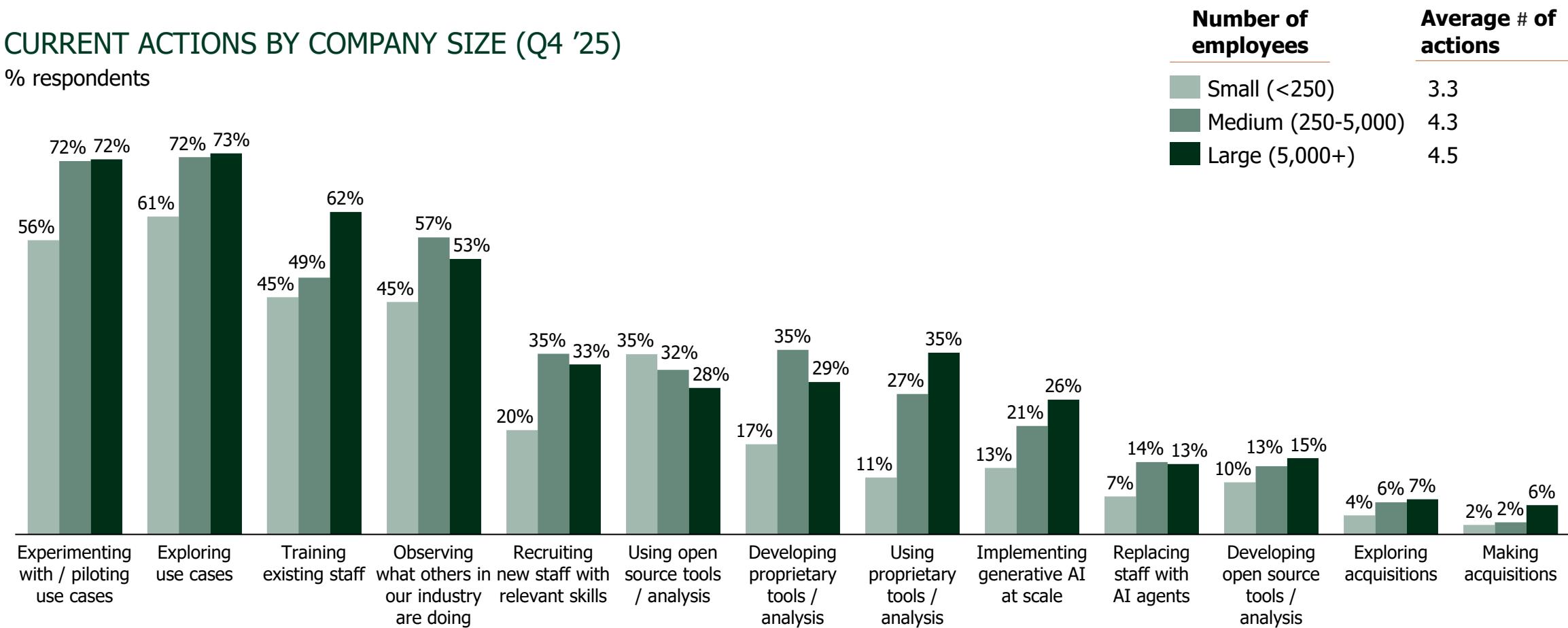
Source: Eden McCallum Business Outlook Survey Q2 – How many people does your company / organisation employ in total? Q18 – To what extent has generative AI impacted your business thus far? Q19 – To the extent AI has impacted your business, has the impact been mostly positive, negative, or mixed ?

"This is the biggest disruption since the beginning of the internet, it allows small players such as ourselves to be as performant as the bigger players."

Perhaps not surprisingly, small companies are less likely to be undertaking GenAI actions of all types

CURRENT ACTIONS BY COMPANY SIZE (Q4 '25)

% respondents



n: <250: 110; 250-5000: 130; 5000+: 89

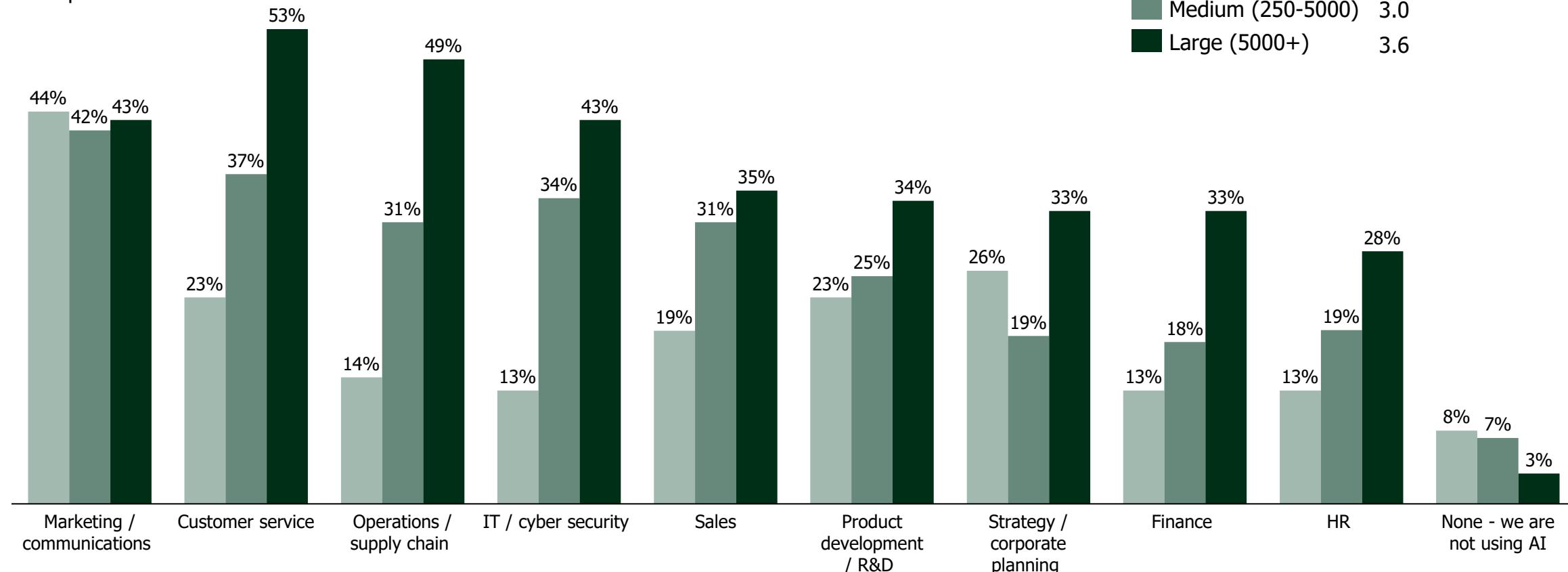
Notes: Don't know and Other responses are excluded. Respondents could select all that apply; hence percentages do not add to 100%.

Source: Eden McCallum Business Outlook Survey Q20 - What is your company currently doing about / with generative AI? Please select all that apply. Q2 – How many people does your company / organisation employ in total?

Large businesses are using GenAI more across all business functions; Marketing / Comms has the most common usage across company size

PILOTING / USING GENERATIVE AI IN BUSINESS FUNCTIONS BY COMPANY SIZE (Q4 '25)

% respondents



n: <250: 110, 250-5000: 130; 5000+: 89

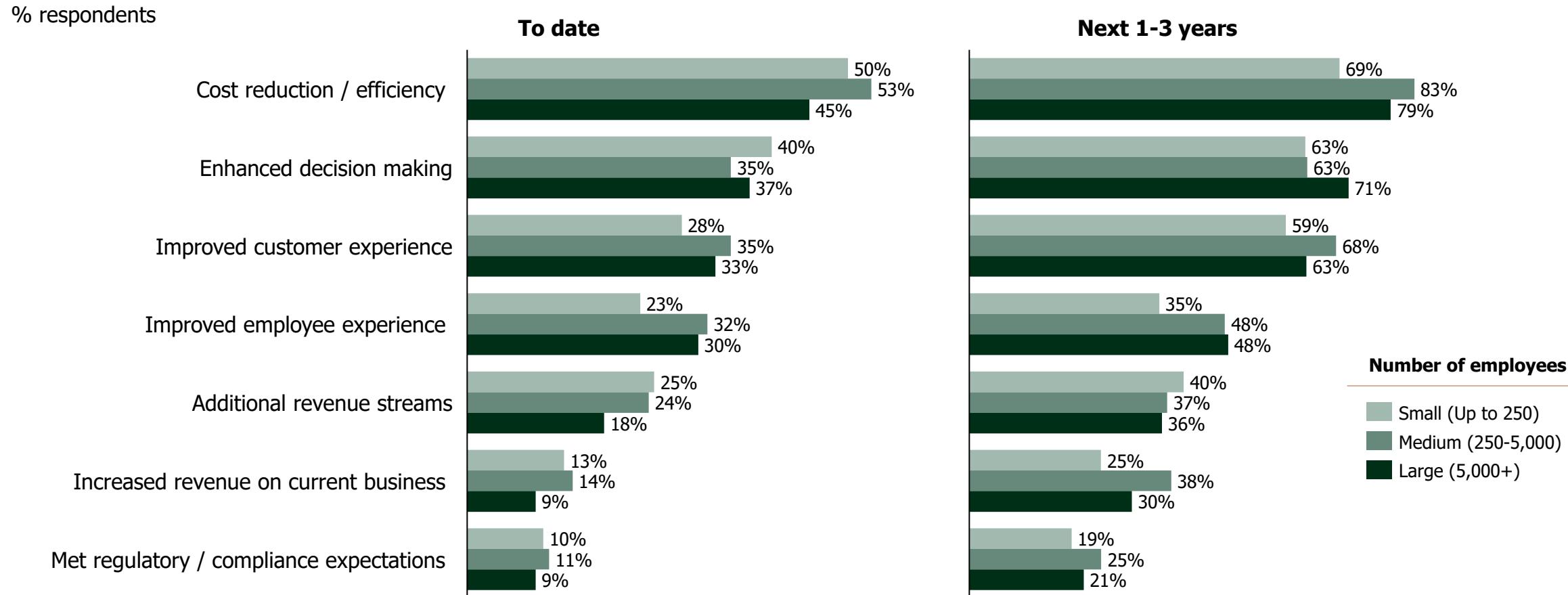
Note: Respondents could select all that apply, hence percentages do not add to 100, and don't know responses are excluded

Source: Eden McCallum Business Outlook Survey. Q22 – In which business functions are you currently using or piloting AI? [Please select all that apply] Q2 – How many people does your company / organisation employ in total?

Business Outlook Survey Q2 2025

Despite different levels of activity with GenAI, companies of all sizes report similar experience and expectations of value generated

VALUE GENERATION TO DATE AND EXPECTED (NEXT 1-3 YEARS) BY COMPANY SIZE (Q4 '25)



n: <250: 110, 250-5000: 130, 5000+: 89

Notes: Don't know responses are excluded. Respondents could select all that apply; hence percentages do not add to 100%.

Source: Eden McCallum Business Outlook Survey Q2 – How many people does your company / organisation employ in total? Q21 – How has your company generated value from generative AI thus far? Q24 – Thinking about the future, how does your company expect to generate additional value from generative AI in the next 1-3 years?

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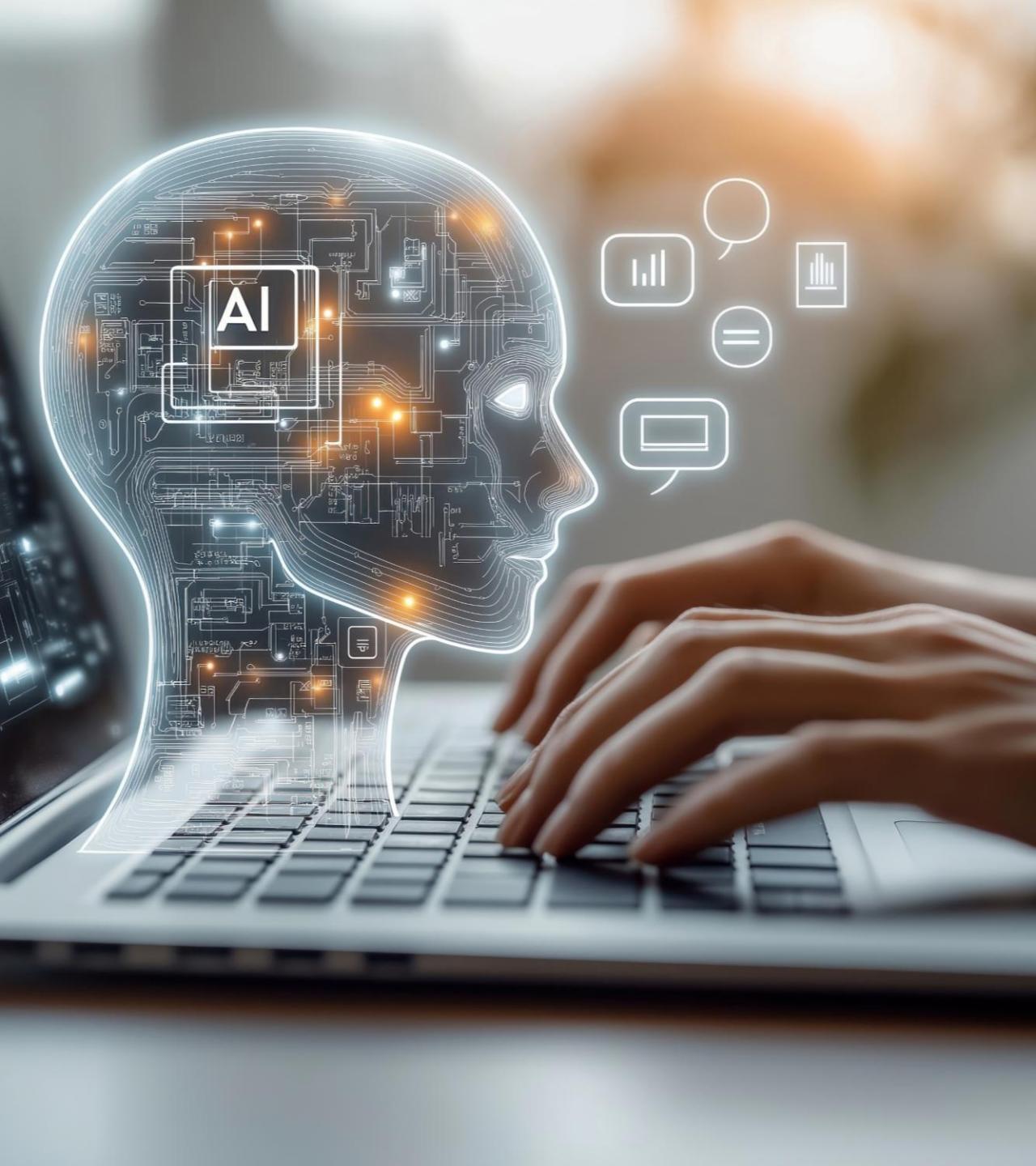
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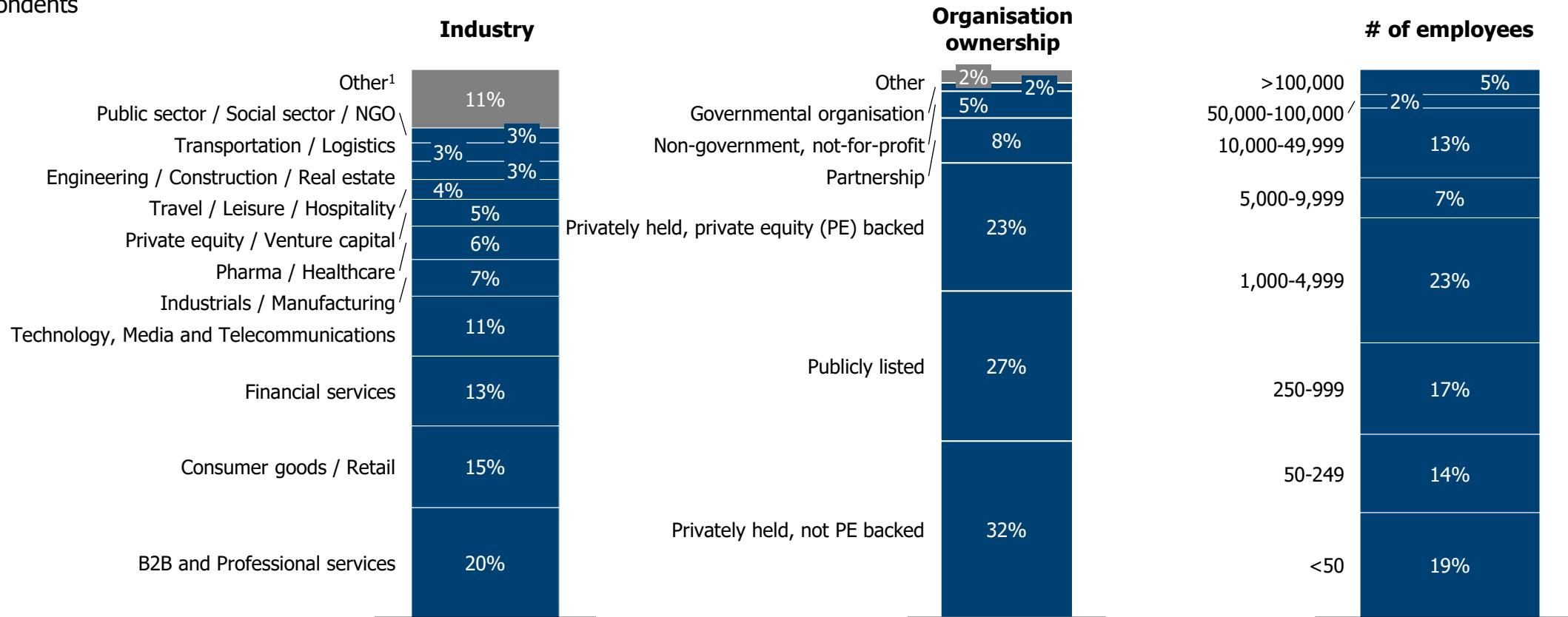
Appendix: Sample details



Survey sample information [1 of 2]

KEY FACTS ABOUT THE SAMPLE SURVEY RESPONDENTS' ORGANISATIONS

% respondents



n: 329

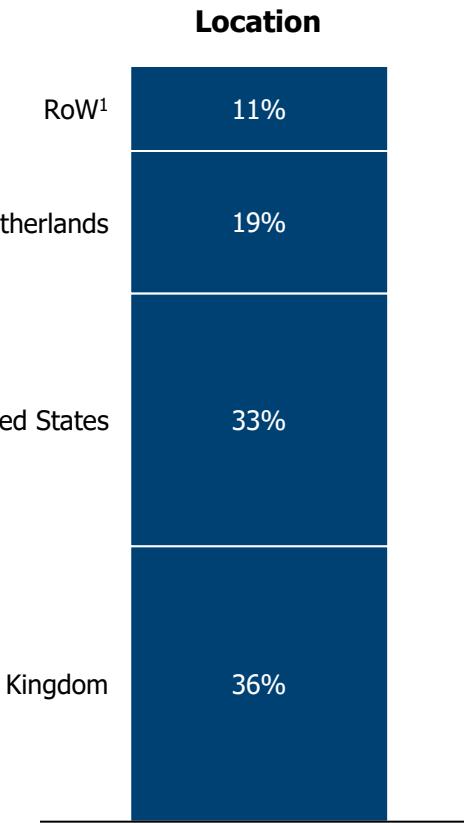
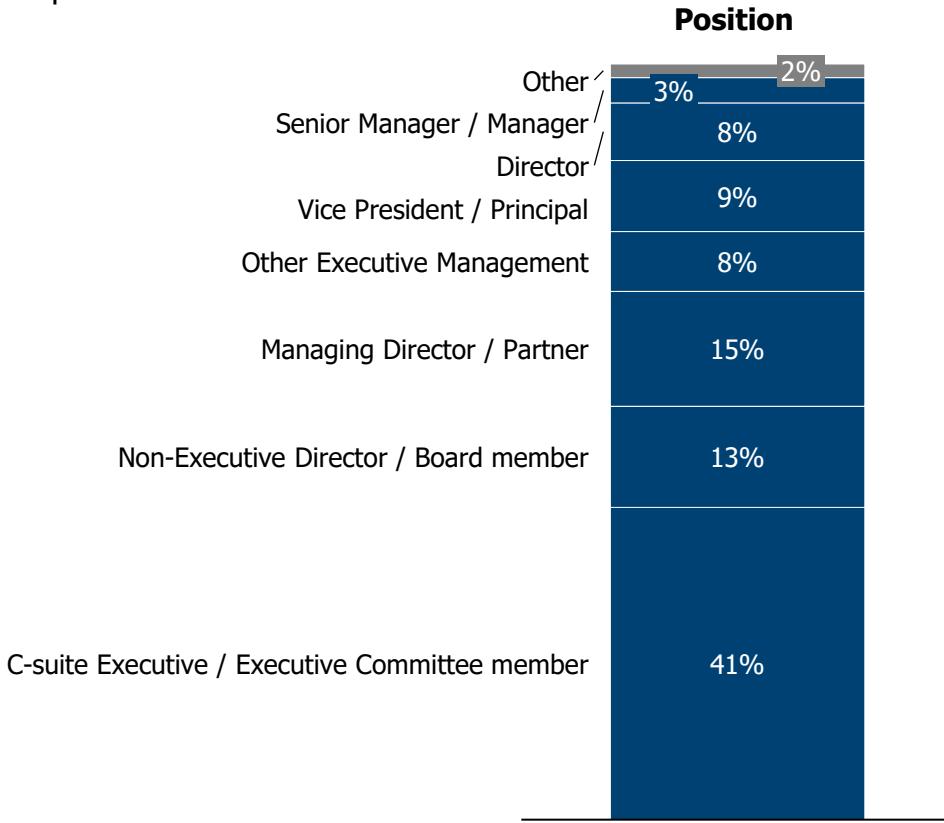
1 Other includes Energy / Utilities at 2% and 'Primary industries (mining, forestry, agriculture, etc.) at 2%

Source: Eden McCallum Business Outlook Survey: Q1 - Which industry is your company / organisation in?; Q4 - How would you best describe your organisation? Please select one.; Q2 - How many people does your company / organisation employ in total?

Survey sample information [2 of 2]

KEY FACTS ABOUT THE SAMPLE SURVEY RESPONDENTS

% respondents



n: 329

(1) RoW n of participants = 8% Europe (ex-UK and NL); 3% other

Source: Eden McCallum Business Outlook Survey; Q5 - Which of the following best describes your role within your organisation?; Q3 – In which country do you live?