The South African Generative AI Roadmap 2025

By World Wide Worx for
Dell Technologies and Intel.

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Foreword

By Tony Bartlett, Director: Data Centre Specialist Sales for Dell Technologies South Africa.

Across South Africa, Generative AI is redefining industries, inspiring innovation, improving operations, and driving growth. The government and businesses are capitalising on AI's potential to enhance customer experiences and gain a competitive advantage.

This GenAI Roadmap for 2025 reveals a notable increase in the use of GenAI across South African organisations, with an impressive 67% of respondents reporting current adoption. That's up from 45% in 2024, so we can see a significant shift away from planning and towards real-world deployment.

The tangible adoption of GenAI is, after all, the crux of the matter. To harness the potential of GenAI, IT leaders must consider its opportunities within their organisation, the right models to address their data, use case needs and how to position themselves for long-term success.

It's important to be fast, but it's *really* important to know exactly what you're doing, what you're creating, and that the customer is at the centre. What's important is creating an experience that is customer-focused. A good approach is to simplify and accelerate the GenAI journey by collaborating closely with a trusted partner.

It's also advisable to deploy GenAI workloads and data where they create the most value, and to bear in mind that GenAI use cases may require significant computing power and unstructured storage.

Of course, ROI is mission-critical. To measure the true impact of GenAI on their business, optimise implementation costs and achieve long-term objectives, organisations need to analyse operational, quality, adoption rate, and marketing and sale metrics. Perhaps most important is to measure the revenue increase from offering AI-driven products and services, taking note of growth in market share and new customer acquisition.

Education is a game-changer. Organisations need to enhance their employees' skillsets to get the most out of any GenAI deployment. With these skills, users will be able to consume AI content transparently by interacting with a single chatbot installed locally on their PCs. The chatbot will search and collect AI information present in the cloud and the company's data centres to finally unify and process the data. You can then track the percentage of employees using GenAI for their work, as well as how it is used, and measure how much strategic work employees can do after being released from manually repetitive tasks.

PCs are ready to consume AI locally but we still lack that 'killer app' that truly acts as the Swiss Army knife of AI and exploits all the capabilities of the neural processors that practically all business and consumer devices will incorporate as standard. At Dell, we are already working on bringing that ease of AI adoption to PCs in the near future, allowing us to make the most of the new AI PCs.

In 2024, we saw the arrival of laptops with neural processors; in 2025 they will be incorporated into desktops. Most importantly, we will witness the launch of small AI language models (SLMs), AI agents, and software that will allow us to get the most out of these neural processors. In 2025, we will be able to generate AI content locally on our PCs without the need for Internet access and without sharing data in the cloud with traditional chatbots like ChatGPT and Copilot.

This will become a reality with AI tools and utilities designed for the use of neural processors and trained with data present locally on our computers such as office documents, emails and PDF files. As a result, users will have their own personalised AI chat for their needs, with the advantages of high execution speed and security provided by the confines of their own PCs.

These rewards do not come without risks, from data security and integrity to system availability, compliance and governance – not to forget costs related to licences, infrastructure and implementation. By having a comprehensive understanding of these costs, businesses can make more informed decisions, allocate resources more effectively and manage risks more proactively. This awareness can lead to more successful AI deployments, ensuring a higher return on investment and a competitive edge in the marketplace.

As this study shows, AI has moved beyond emerging technology status and now plays a central role in digital transformation in South Africa. Companies that approach AI with robust protections and innovative strategies will not only mitigate risks but position themselves as industry leaders. The innovation AI enables will drive sustainable growth for businesses across South Africa, setting them up to thrive in an increasingly digital and data-centric world. The future belongs to those who innovate securely, balancing progress with responsibility.

Executive Summary

By Arthur Goldstuck, CEO, World Wide Worx

The South African Generative AI Roadmap 2025, conducted by World Wide Worx in collaboration with Dell Technologies, reveals a sharp increase in the active use of GenAI across organisations, with **67%** of respondents now reporting current adoption – up from 45% in 2024. This marks a significant shift from experimentation and planning toward real-world deployment, particularly in operational areas such as content generation, reporting, and analytics.

However, this rapid growth continues to outpace the development of formal strategies, governance structures, and responsible use frameworks. The findings reflect strong optimism about GenAI's potential to drive growth, innovation, and efficiency, alongside growing recognition of the challenges involved in achieving secure, well-managed adoption.

The research reflects views primarily from IT and strategic decision makers at mid-sized and large companies (organisations of over 200 employees) and particularly strong participation from the manufacturing, logistics, construction, and retail sectors.

GenAI adoption and company policy

- **67%** of respondents are actively using GenAI (officially, unofficially, or both) – a significant increase from 2024's 45%.
- Formal adoption is growing (**15%** using approved tools, up from 11% in 2024).
- Shadow AI remains significant at **32%** (up from 24%), with an additional **20%** using GenAI both officially and unofficially (up from 10%).
- **33%** report not using GenAI at all (down from 55%), suggesting persistent adoption barriers.

Strategy and readiness

While many organisations are using or exploring GenAI, far fewer have developed structured strategies to guide their approach:

- **14%** of respondents say their company has a company-wide GenAI integration strategy, with an additional **22%** reporting strategies within specific business units or divisions.
- **34%** indicate that a strategy is under discussion, while **22%** say their company has no strategy and no discussions underway.
- These results suggest that formal planning and alignment are lagging behind adoption, with many companies still unsure how to integrate GenAI into their broader business models.

Implementation timelines

For GenAI deployment timelines, while some companies are moving ahead, a large proportion remain on the sidelines:

- **20%** of respondents report that their organisation has already implemented GenAI solutions, and a further **15%** are currently in the process of implementation.
- **51%** report having no current plans to implement GenAI formally, with only a small minority targeting deployment within the next six months, one year, or two years.

Barriers to adoption

- High implementation costs (**39%**), data privacy concerns (**29%**), and lack of skilled talent (**28%**) remain the top challenges.
- Other barriers: resistance to change (**27%**), unclear business case (**20%**), and regulatory compliance (**14%**).
- Ethical concerns, hallucinations, leadership support, and bias issues rank lower but remain present.

GenAI maturity and deployment models

- **35%** are dabbling with basic GenAI services, down from 53% in 2024.
- Regular use of public services has increased to **35%**, up from 13% in 2024.
- Advanced deployments remain limited: **6%** using public cloud, **3%** on-premises, and **13%** hybrid use (including new three-tier users at **7%**).

Safeguards and responsible use

- **37%** have no measures in place for responsible GenAI use; **22%** are planning to introduce measures.
- Only **13%** have comprehensive guardrails (including safety, privacy, and bias mitigation).
- Monitoring for hallucinations (**7%**) and controls to prevent data leakage (**6%**) remain rare.

Perceived business impact

- **70%** expect significant or major improvements from GenAI in growth, innovation, and operational efficiency.
- Strongest positive impact seen in productivity (**83%** positive) and competitiveness (**86%** positive).
- Other areas like profit, sales, logistics, and customer service show mixed results, with many respondents neutral.

Use of time savings

- **54%** are using time saved through GenAI for upskilling employees.

- Only **3%** report headcount reduction; **26%** report no time savings achieved yet.
- A minority (**18%**) are reducing work hours to improve work-life balance.

Incidence of negative outcomes

- Negative outcomes remain rare: **1%** report security breaches, privacy breaches, or reputational damage – all due to unauthorised (Shadow AI) use.
- No reported impact on staff reductions or employee resistance.

Environmental impact: An overlooked area

- **76%** of organisations have no specific measures to address GenAI's environmental impact.
- Only small percentages report energy monitoring (**11%**), sustainable AI solutions (**10%**), carbon offsets (**5%**), or usage limits (**3%**).

Supplier landscape shifts

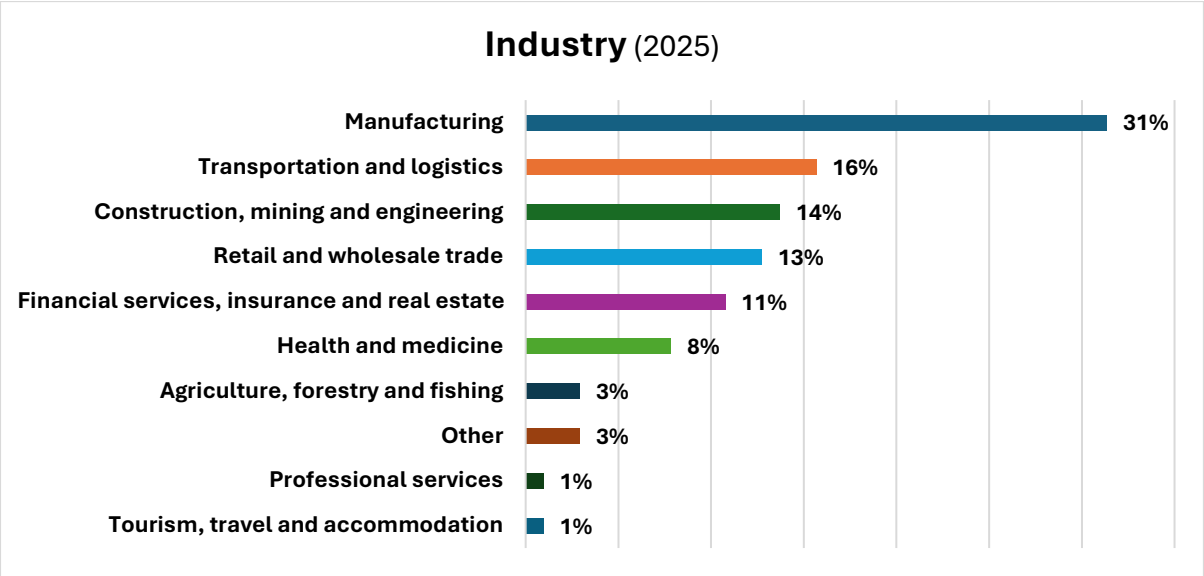
- Nvidia (**99%**), Intel (**93%**), and Dell (**92%**) are identified as the top GenAI hardware providers.
- HPE (**59%**), SuperMicro (**58%**), and Qualcomm (**56%**) gain ground.
- Samsung, Lenovo, and Huawei see significant declines in GenAI-specific relevance.

AI use across business functions

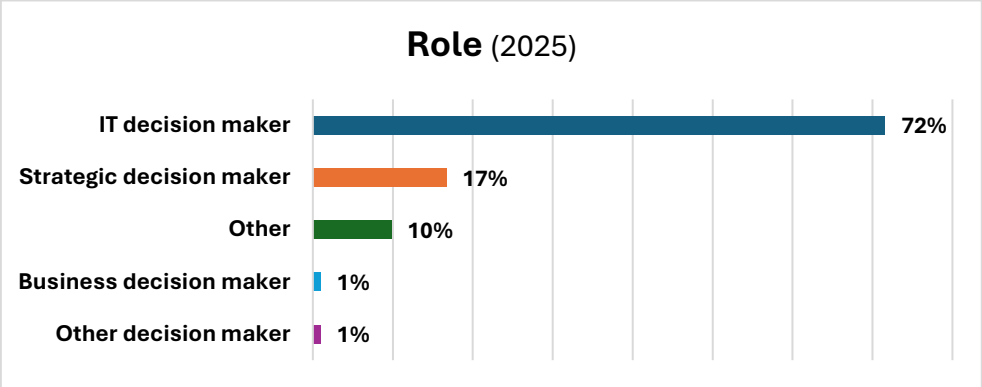
- Strong shift toward operational uses:
    - Email content generation (**94%**) and report writing (**87%**) now lead AI applications.
    - Marketing content (**68%**), market research (**74%**), and data analysis (**59%**) remain widely used but have declined.
- AI for training materials (**51%**) is rising, while use for website content (**44%**) and social media content (**41%**) is declining.

The findings

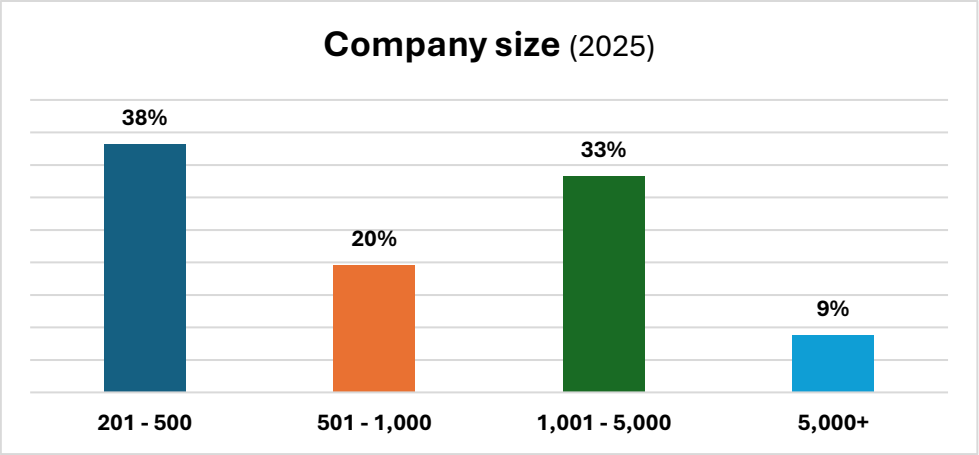
Industry



Role

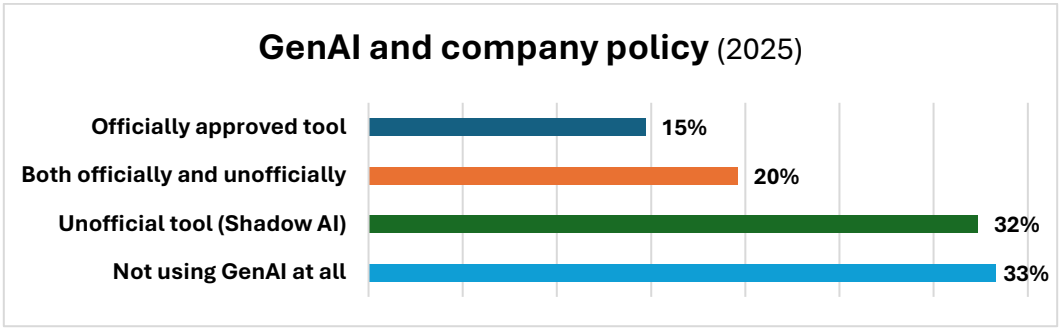


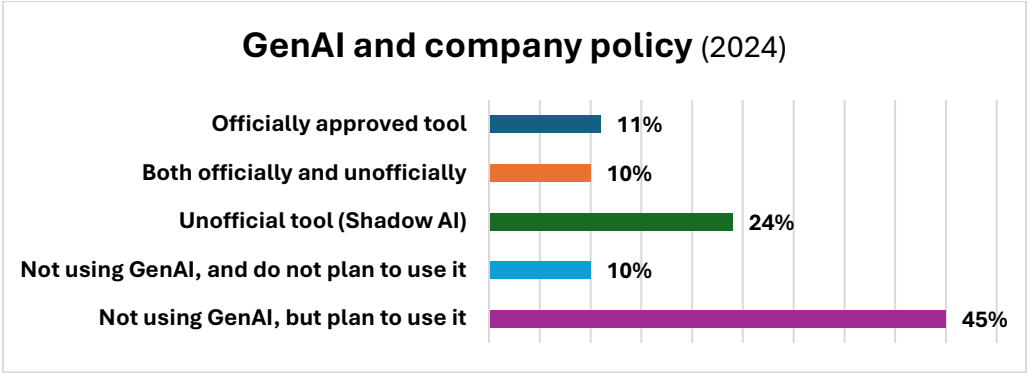
Company size



GenAI and company policy

The 2025 data reveals a sharp increase in GenAI adoption across organisations, alongside early signs of maturing usage patterns. While challenges around strategy, governance, and oversight remain, more companies are moving from isolated experimentation toward broader, more consistent engagement with these technologies. However, this growth in usage continues to outpace the development of formal policies and structured integration.





In 2025, 67% of respondents report using GenAI in some form within their organisations – whether through officially approved tools, unofficial use (often referred to as Shadow AI), or a combination of both. This reflects a strong shift from experimentation and planning toward actual deployment, up from 45% reporting active use in 2024.

Breaking down the 2025 usage patterns reveals some important trends. The proportion of respondents using GenAI as an officially approved tool has reached 15%, an increase from 11% in 2024. This growth suggests that more organisations are moving toward formalising their use of GenAI, likely driven by a need for compliance, risk management, and structured implementation strategies.

Unofficial use of GenAI, or Shadow AI, remains significant, with 32% of respondents indicating they use GenAI without formal organisational approval. This represents a rise from 24% in 2024 and may reflect the ongoing enthusiasm for experimentation and innovation at the individual or team level, even where official policies lag behind.

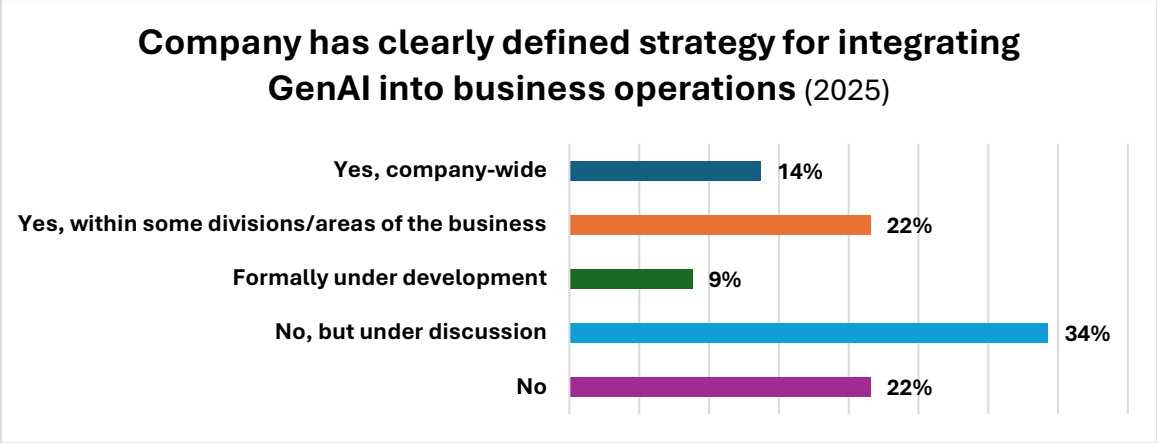
A further 20% of respondents say they are using GenAI both officially and unofficially. This figure has doubled since 2024, when only 10% reported combined usage. It suggests a growing complexity in GenAI adoption, where formal strategies coexist with grassroots use, potentially creating both opportunities and risks in governance.

Meanwhile, 33% of respondents report not using GenAI at all in 2025. This group includes both those not planning to use the technology and those still in early planning stages. In 2024, this figure was significantly higher at 55% (with 45% planning adoption and 10% not planning to use GenAI at all).

The 2025 data highlights significant growth in GenAI usage, with clear signs of maturing official adoption alongside persistent Shadow AI activity. The increase in formal usage points to progress in governance and structured integration, yet the continued prevalence of unofficial use underscores the need for organisations to balance innovation with effective oversight.

GenAI strategy and organisational readiness

While many organisations are engaging with GenAI technologies, far fewer have formalised their approach through a clearly defined integration strategy. This points to a gap between experimentation or adoption and the development of structured, organisation-wide plans for embedding GenAI into business processes.



In 2025, only 14% of respondents report having a company-wide strategy for integrating GenAI into their operations. A further 22% indicate that such strategies exist, but only within specific divisions or areas of the business. Combined, this means 36% of organisations have moved beyond informal or ad hoc use toward some level of structured planning and implementation.

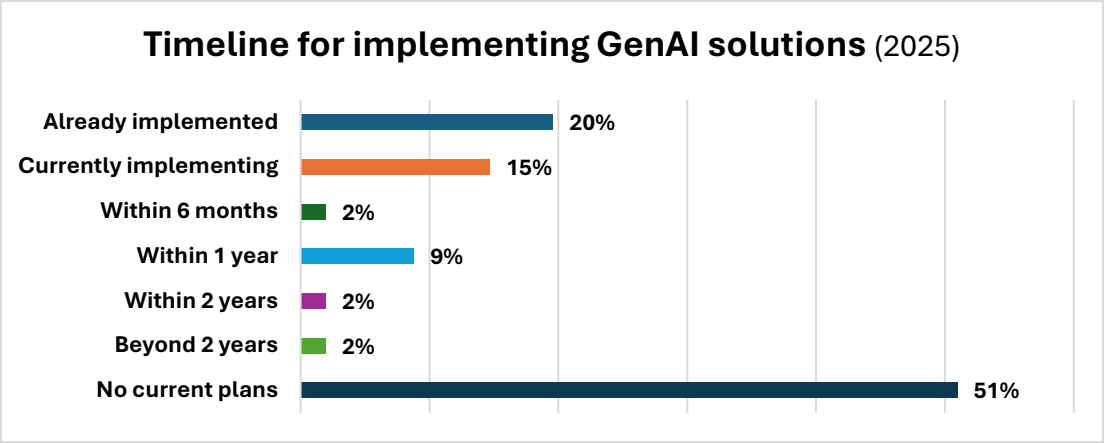
However, a significant proportion of respondents highlight that strategy work is still in progress. 9% state that a formal strategy is under development, while 34% say there is no strategy yet, but discussions are taking place. This suggests that although many companies recognise the importance of GenAI, they remain in the early stages of determining how best to align these technologies with their business objectives, governance frameworks, and operational models.

Notably, 22% of respondents report that their company has neither a strategy nor discussions underway regarding GenAI integration. This group may reflect sectors or organisations where GenAI is not yet seen as a priority, or where other barriers – such as lack of skills, limited resources, or uncertainty about use cases – are preventing meaningful engagement with strategic planning.

The 2025 data highlights that while technical adoption of GenAI is growing, strategic alignment is still catching up. The prevalence of discussions without formal strategies indicates that many organisations are aware of the need for structured approaches but have not yet translated this awareness into action. As the technology continues to advance and regulatory expectations around AI use grow, the development of clear, company-wide strategies may become increasingly critical for successful and responsible GenAI integration.

GenAI implementation timelines

The 2025 data on GenAI implementation timelines provides valuable insight into how organisations are pacing their adoption of these technologies. While many companies express interest in GenAI, the data reveals that actual deployment remains uneven, with over half of respondents (51%) reporting no current plans for implementation.



Among those who have engaged with GenAI, 20% say they have already implemented solutions, and a further 15% are currently in the process of rolling out GenAI initiatives. This group – accounting for 35% of respondents – represents the organisations actively moving beyond exploration into execution, reflecting early adopters who may be seeking competitive advantage or operational efficiencies through GenAI integration.

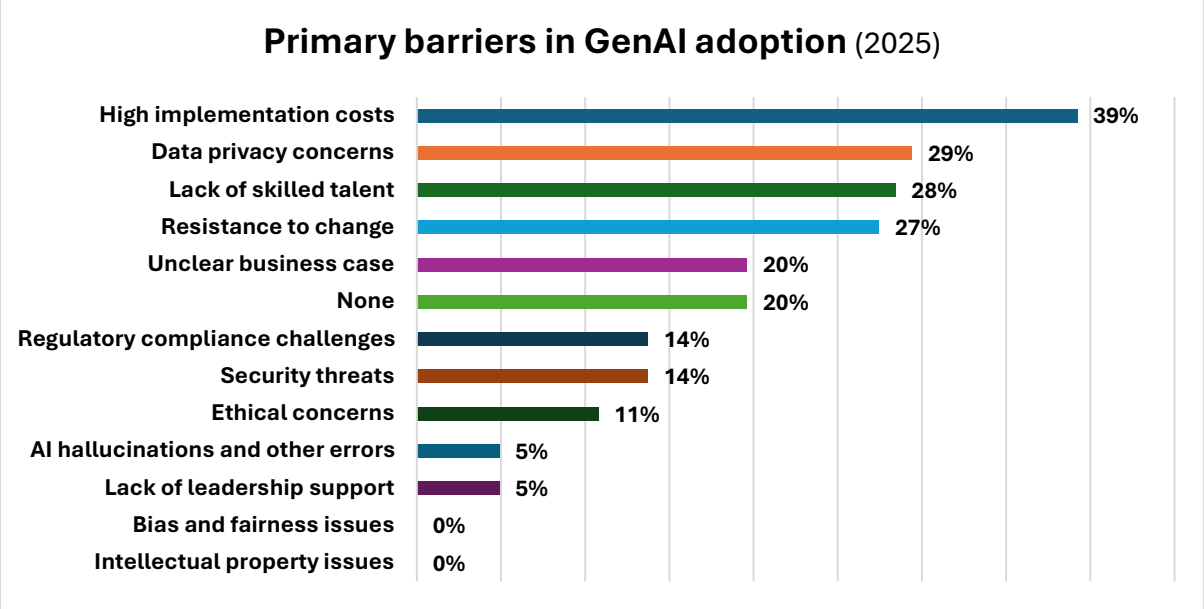
Looking ahead, a relatively small proportion of companies have set short- to medium-term implementation goals. Only 2% expect to roll out GenAI solutions within the next six months, 9% within a year, and another 2% within two years. A further 2% indicate timelines extending beyond two years. These relatively low figures suggest that while interest in GenAI remains strong, many organisations are approaching implementation cautiously, possibly due to uncertainties around use cases, budget constraints, or regulatory considerations.

The large share of respondents with no current plans highlights the ongoing barriers to GenAI adoption across sectors. This could reflect a range of factors, including lack of internal expertise, unclear return on investment, or competing technology priorities. It may also indicate that for some businesses, GenAI solutions are still perceived as experimental rather than essential.

The timeline data suggests a clear divide between a group of early movers who are actively implementing GenAI and a larger segment of the market that remains in a wait-and-see position. For the latter group, ongoing developments in technology maturity, regulatory frameworks, and demonstrated business value will likely influence future decisions about whether and how to engage with GenAI solutions.

Primary barriers to GenAI adoption

The 2025 data highlights a complex range of barriers that organisations face when considering the adoption of GenAI solutions. While enthusiasm for the potential of GenAI remains high, these obstacles underline the practical challenges that many companies encounter when moving from interest to implementation.



The most frequently cited barrier is high implementation costs, selected by 39% of respondents. This suggests that, for many organisations, the financial investment required for GenAI technologies – including infrastructure, licensing, and integration with existing systems – remains a major hurdle. Cost concerns may be especially pronounced for smaller companies or for those in industries where margins are tight.

Data privacy concerns (29%) and lack of skilled talent (28%) are also prominent challenges. These issues reflect both the technical and regulatory complexities of deploying GenAI effectively. Data privacy remains a sensitive issue, particularly where large language models may require access to significant amounts of internal or customer data. Meanwhile, the shortage of skilled professionals capable of managing, developing, and deploying GenAI solutions continues to be a bottleneck for many organisations, limiting their ability to move projects forward.

Resistance to change was identified by 27% of respondents, highlighting the cultural and organisational factors that can impede GenAI adoption. Even when technology is available, internal hesitation – whether from leadership, middle management, or frontline staff – can slow down or prevent adoption efforts.

Interestingly, 20% of respondents report an unclear business case as a barrier, suggesting that while GenAI is widely discussed, many companies still struggle to define how these tools will create measurable value within their specific operational contexts. Without clear use cases and expected outcomes, investments in GenAI can remain difficult to justify.

Regulatory and risk-related concerns are also present, though to a lesser extent. Regulatory compliance challenges (14%), security threats (14%), and ethical concerns (11%) indicate that while these issues are not the primary blockers, they remain relevant considerations for a significant minority of organisations. Meanwhile, AI hallucinations and other errors (5%) and lack of leadership support (5%) appear to be less widespread concerns but still noteworthy in some contexts.

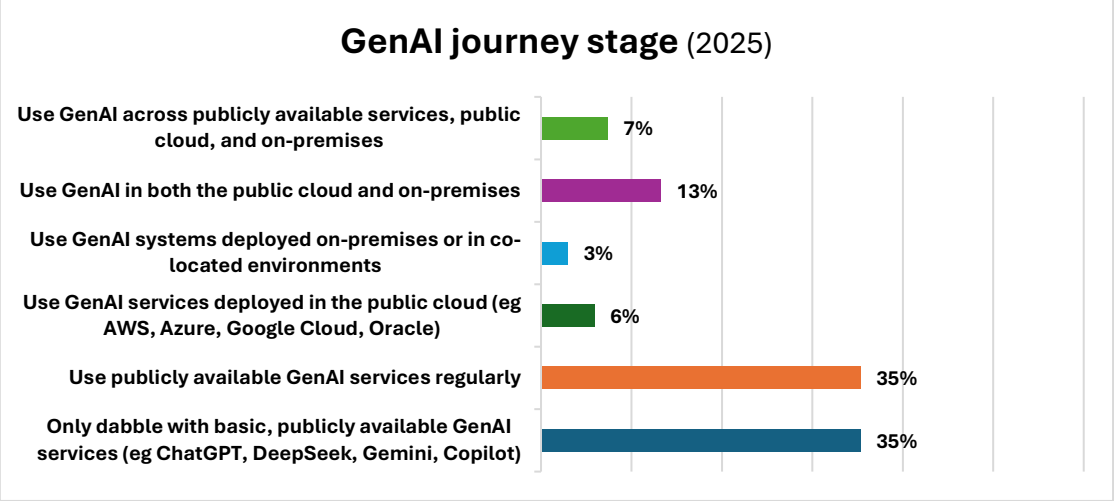
Notably, 20% of respondents selected 'None', indicating that nearly one-fifth of organisations do not perceive significant barriers to GenAI adoption. This may reflect either a high level of preparedness or a limited level of engagement with GenAI, where challenges have not yet been encountered.

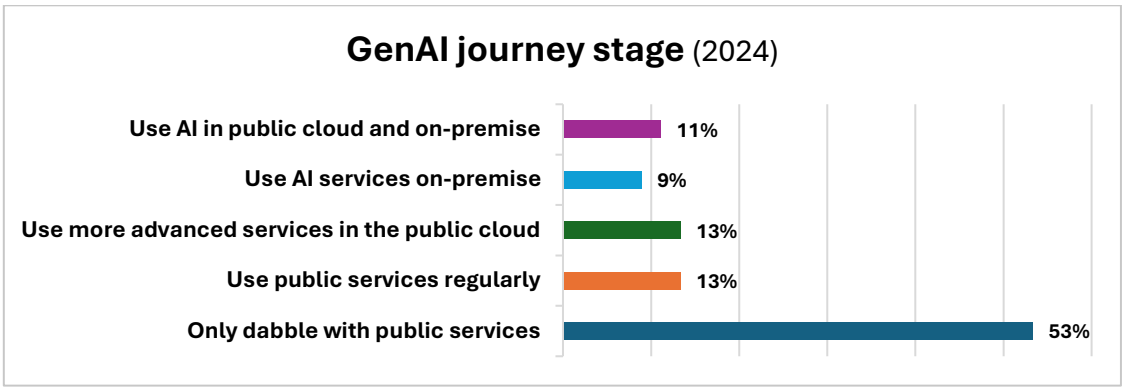
Bias and fairness issues and intellectual property issues were not selected by any respondents, which may suggest that these concerns are either not top of mind for most organisations at this stage, or are being addressed through existing safeguards and frameworks.

The findings point to a landscape where financial, technical, and cultural challenges dominate the conversation around GenAI adoption, while regulatory and ethical considerations, though present, appear to be secondary concerns for many companies. Overcoming these barriers will likely require a combination of cost-effective solutions, investment in skills development, and clearer articulation of business value.

GenAI maturity: From experimentation to integration

The 2025 data on GenAI maturity reveals that many organisations remain in the early stages of their GenAI journey, with usage patterns continuing to reflect a cautious and exploratory approach. While there are some signs of growing sophistication among a subset of respondents, broad-based, advanced integration remains limited.





In 2025, 35% of respondents who are using GenAI report that they are only dabbling with basic, publicly available GenAI services, such as ChatGPT, Gemini, DeepSeek, or Copilot. This represents a notable decline from the 53% recorded in 2024 for initial exploration, suggesting that while casual experimentation remains the most common entry point, a portion of companies has moved toward more regular or structured use.

A further 35% now use publicly available GenAI services regularly, up from 13% in 2024. This significant increase points to a shift from one-off experimentation toward more consistent engagement with GenAI tools, even if many organisations continue to rely primarily on public platforms rather than bespoke solutions.

When it comes to deeper levels of integration, the proportion of companies using GenAI services deployed in the public cloud is now 6%, slightly below the 13% reported last year for the equivalent "advanced services in the public cloud" category. This may reflect differences in how respondents interpreted the options this year or could indicate that while regular use of public services has grown, fewer companies have taken the next step toward investing in more customised, cloud-based deployments.

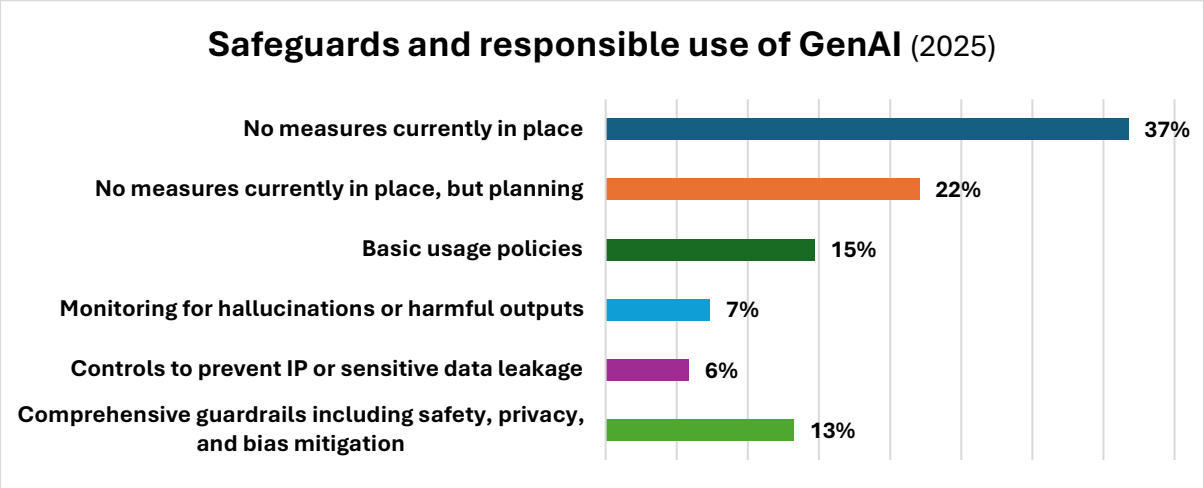
The share of respondents using on-premises or co-located GenAI systems remains low at 3%, down from 9% in 2024. This suggests that most organisations continue to favour the flexibility and scalability of cloud-based options over the higher control (but also higher complexity and cost) associated with on-premise deployments.

More advanced hybrid strategies, however, show some growth. Thirteen percent of respondents now use GenAI in both the public cloud and on-premises environments, slightly above the 11% reported last year. An additional 7% report an even broader approach, using GenAI across publicly available services, public cloud, and on-premises – a more detailed category that was not explicitly captured in 2024 but reflects a maturing level of GenAI integration for some companies.

Taken together, the 2025 data suggests that while a large segment of organisations remains at the exploratory or early adoption stage, there is a steady progression toward more regular use of GenAI tools. However, widespread, advanced integration – particularly involving hybrid cloud and on-premises strategies – remains confined to a relatively small group of companies. This pattern reinforces the view that while interest in GenAI continues to be strong, full-scale operational deployment is still a work in progress for many organisations.

Safeguards and responsible use of GenAI

The 2025 data reveals that many organisations using GenAI have yet to implement robust measures to ensure the safe and responsible use of these technologies. This suggests that while adoption is advancing, governance practices and risk mitigation strategies are still developing across much of the business landscape.



More than a third of respondents (37%) report having no measures currently in place to manage the risks associated with GenAI use. A further 22% indicate that while they do not yet have safeguards in place, they are planning to introduce them. Combined, this means that over half of organisations using GenAI are either operating without formal controls or are still in the planning stages, leaving a significant gap in responsible usage practices.

Among those who have introduced measures, the most common approach is the implementation of basic usage policies, reported by 15% of respondents. These policies likely cover general guidelines around how GenAI tools should be used but may not extend to technical controls or monitoring mechanisms.

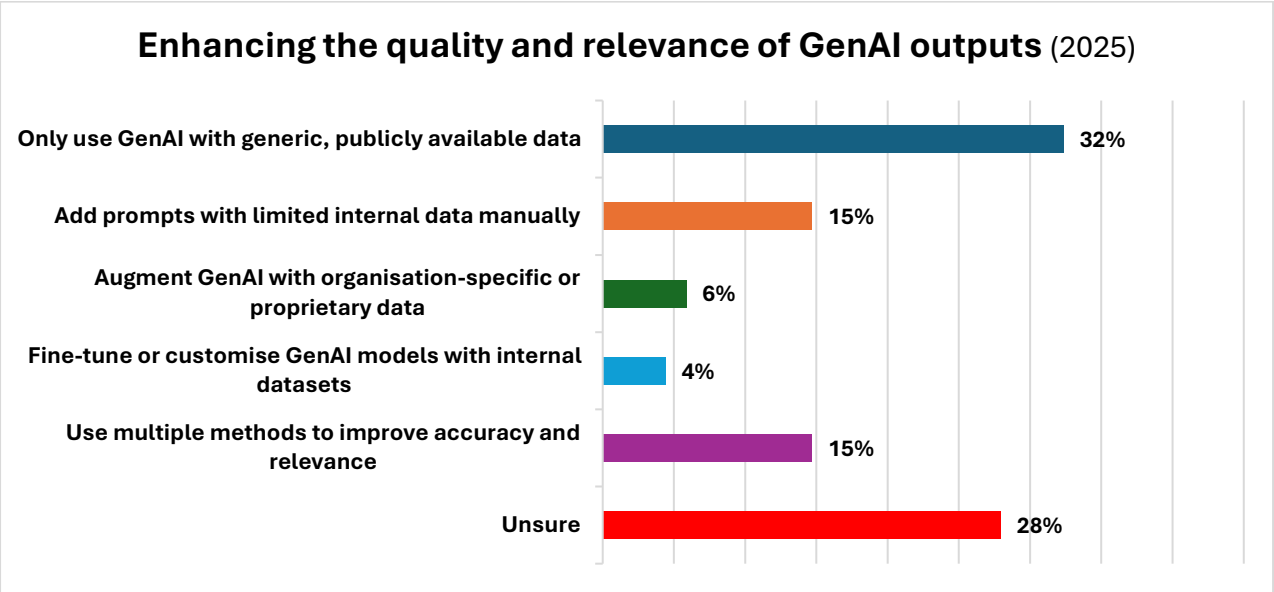
More advanced measures appear far less widespread. Only 7% report actively monitoring for hallucinations or harmful outputs – a key concern in the use of generative AI models where inaccurate or problematic responses can pose significant risks. Even fewer, 6%, have controls in place to prevent intellectual property (IP) or sensitive data leakage, despite this being a commonly cited barrier to GenAI adoption elsewhere in the survey.

At the highest level of maturity, 13% of respondents state that their organisation has put in place comprehensive guardrails, which include elements such as safety protocols, privacy protections, and bias mitigation measures. This group represents the most proactive segment of respondents, reflecting a growing recognition of the need for holistic risk management when deploying GenAI technologies.

The data points to a significant gap between GenAI adoption and the maturity of responsible use frameworks. While early-stage exploration and experimentation remain common, many organisations have yet to fully address the governance challenges that come with GenAI deployment. As use cases expand and regulatory scrutiny around AI continues to rise, the pressure to implement more structured and comprehensive safeguards is likely to grow.

Enhancing the quality and relevance of GenAI outputs

The 2025 data provides insight into how organisations are approaching the challenge of ensuring that GenAI outputs are accurate, relevant, and useful for their specific business needs. The findings suggest that while many companies are engaging with GenAI tools, few have progressed toward deeper levels of optimisation or customisation, with a significant portion still relying on generic usage patterns.



The most common approach, selected by 32% of respondents, is to only use GenAI with generic, publicly available data. This reflects a basic level of engagement, where organisations depend on the general capabilities of GenAI models without incorporating their own context-specific information. While this may reduce complexity and avoid certain risks, it also limits the potential for GenAI to deliver tailored insights or outputs aligned to business-specific needs.

A further 28% of respondents are unsure about how their organisation enhances the quality and relevance of GenAI outputs. This high level of uncertainty could indicate either a lack of clear strategy in this area or limited involvement of respondents in the technical aspects of GenAI deployment, underscoring a potential gap between usage and governance or technical oversight.

Among those actively working to improve output quality, 15% report using multiple methods to improve accuracy and relevance. This suggests a more sophisticated approach, likely involving prompt engineering, validation processes, or layered use of different tools to refine results.

Manual approaches are also evident, with 15% of respondents stating that they add prompts with limited internal data manually. This method provides a way to inject some organisational context into GenAI interactions without the complexity of fine-tuning models, but it remains labour-intensive and less scalable.

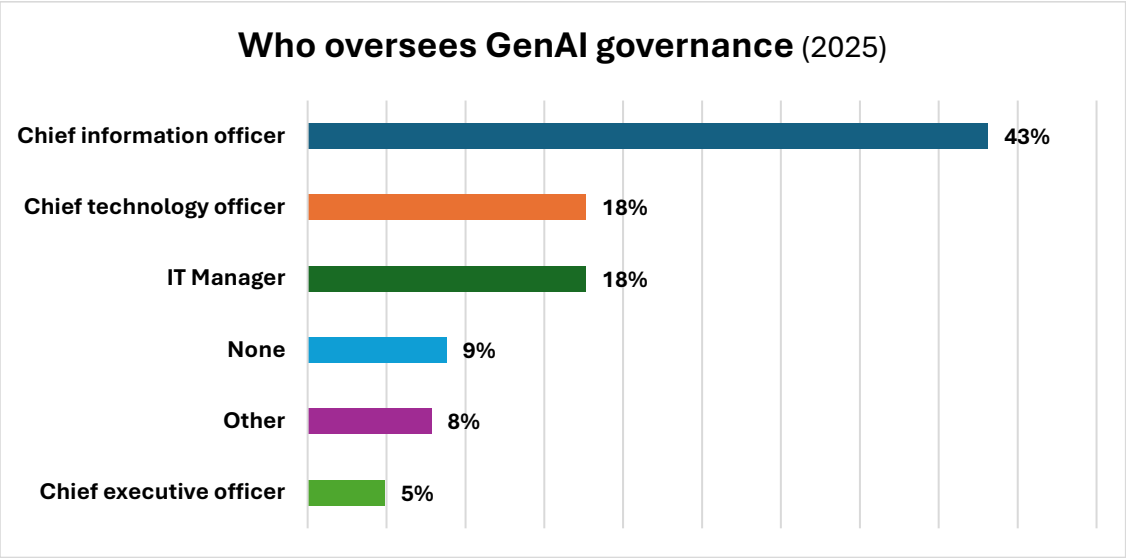
More advanced strategies, such as augmenting GenAI with organisation-specific or proprietary data, are reported by 6% of respondents. This approach helps tailor GenAI outputs to the unique needs of the business, improving the relevance of responses and insights. However, adoption of this method remains relatively low, likely due to the technical and compliance challenges associated with data integration.

At the highest level of customisation, only 4% of respondents report fine-tuning or customising GenAI models with internal datasets. This reflects the significant investment of resources, expertise, and infrastructure required to undertake model training or fine-tuning, which remains out of reach for many organisations, particularly those still in the early stages of GenAI adoption.

The data suggests that while there is growing interest in enhancing GenAI outputs, most organisations are still at the early or intermediate stages of this journey. The heavy reliance on generic data and the high level of uncertainty around enhancement practices indicate that there is considerable room for maturity in aligning GenAI outputs with business-specific goals.

GenAI governance

The 2025 data on GenAI governance highlights how responsibility for overseeing the use, policy, and risk management of GenAI technologies is being allocated within organisations. The findings suggest that, for most companies, GenAI governance is situated firmly within the IT and technology leadership domain, though a notable portion of organisations still lack formal oversight structures.



The chief information officer (CIO) is the most common role responsible for GenAI governance, cited by 43% of respondents. This strong concentration of responsibility within the CIO role suggests that many organisations view GenAI as a technology-driven initiative, requiring oversight from those who manage core information systems, data strategy, and IT infrastructure.

The chief technology officer (CTO) is reported as overseeing GenAI governance by 18% of respondents, while 18% say this responsibility sits with an IT manager. Together, these figures confirm that most of the governance is handled within the technology leadership tier, either at the executive or operational level.

A smaller group (5%) place this responsibility with the chief executive officer (CEO), indicating direct executive ownership in some organisations – perhaps where GenAI is considered highly strategic or where leadership is personally driving innovation efforts. However, this remains the exception rather than the norm.

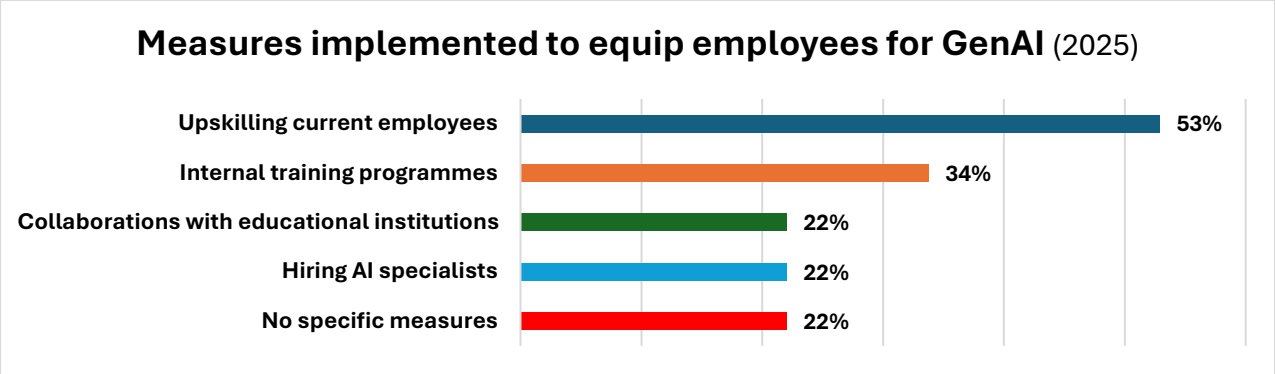
Interestingly, 9% of respondents report that no one currently oversees GenAI governance within their organisation. This lack of formal ownership may reflect the relatively early stage of GenAI maturity in many companies, where adoption is still informal or fragmented across departments without centralised coordination.

The 'Other' category, selected by 8% of respondents, is dominated by IT-related roles. This reinforces the broader pattern seen in the main response options, where GenAI governance remains largely situated within the IT function. Only a small number of responses within this category refer to roles outside of IT, suggesting that while cross-functional ownership exists in a few cases, responsibility for GenAI governance continues to reside primarily within technology leadership across most organisations.

The data points to a pattern where GenAI governance is most treated as an extension of existing IT governance structures rather than being elevated to broader executive leadership or standalone functions. As regulatory frameworks around AI evolve and the strategic importance of GenAI grows, organisations without clear governance ownership – or those relying solely on operational IT leadership – may face increased pressure to formalise their oversight mechanisms.

Building GenAI skills within the workforce

The 2025 data on skills development highlights how organisations are preparing their workforce for the adoption and effective use of GenAI technologies. While many companies are taking proactive steps to build internal capabilities, a significant proportion still report having no specific measures in place to support employee readiness.



he most common approach, selected by 53% of respondents, is upskilling current employees. This focus on developing the existing workforce suggests that many organisations recognise the importance of equipping their teams with the knowledge and skills needed to work effectively with GenAI tools, rather than relying solely on new hires or external expertise.

Internal training programmes are also widely used, reported by 34% of respondents. These programmes likely range from formal workshops and learning modules to more informal knowledge-sharing initiatives, providing structured opportunities for employees to understand GenAI capabilities, use cases, and best practices.

In addition to internal efforts, 22% of organisations report engaging in collaborations with educational institutions. These partnerships may include joint research initiatives, customised training courses, or certification programmes aimed at bridging the skills gap and accessing the latest knowledge from academic and research communities.

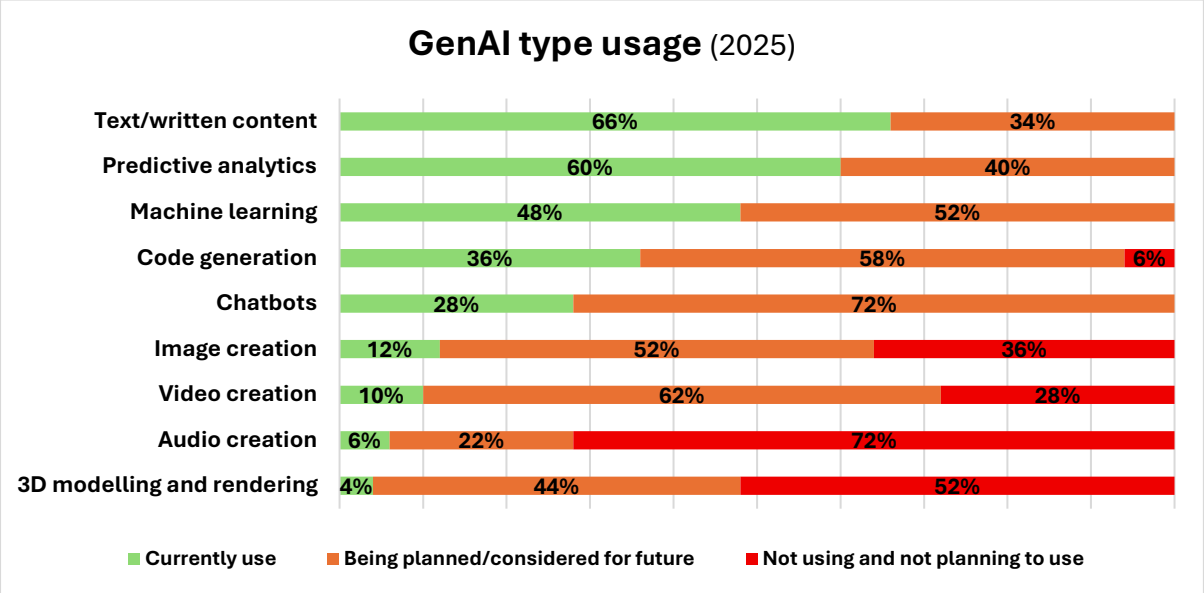
Similarly, 22% of respondents say their company is hiring AI specialists to bring in the necessary expertise. This approach complements internal training by adding specialist skills that may not exist within the current workforce, particularly in more technical or advanced areas such as model development, data science, or AI governance.

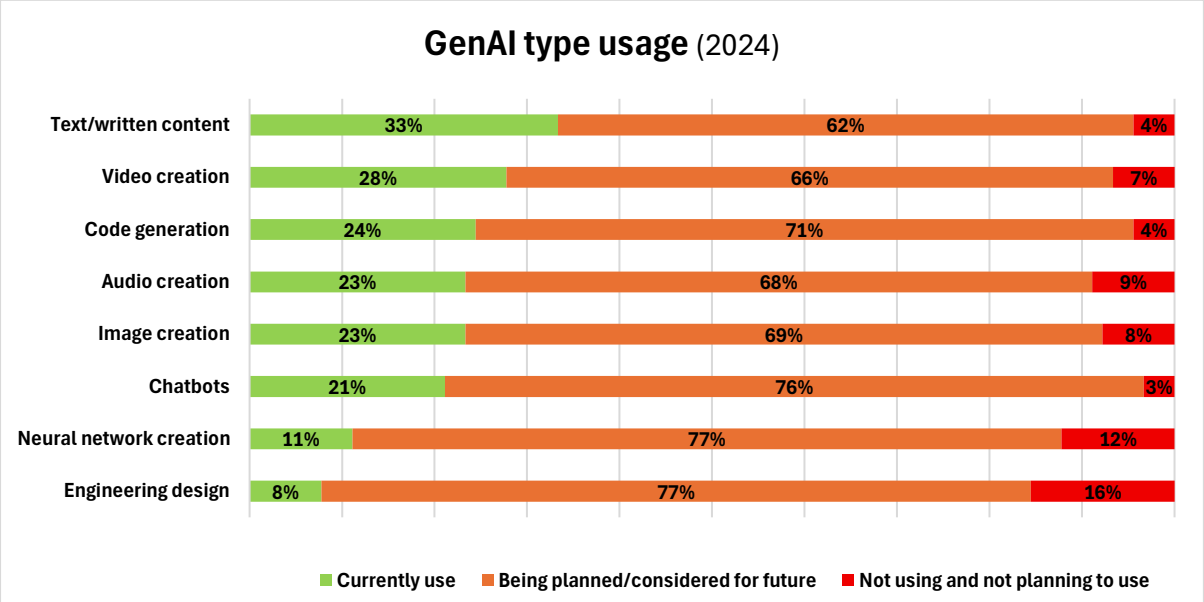
However, 22% of respondents indicate that their organisation has no specific measures in place to prepare employees for GenAI adoption. This lack of action could reflect the early stage of adoption in some companies, limited resources, or uncertainty around which skills will be most critical. It may also signal that, in certain cases, GenAI use is still confined to experimentation or individual initiatives rather than widespread organisational deployment.

The data suggests that while there is broad recognition of the need to build GenAI-related skills, approaches remain varied. Many organisations are relying on upskilling and internal programmes, but a considerable number have yet to formalise their efforts – highlighting a potential area of weakness that could affect the success of GenAI initiatives as adoption matures.

GenAI type usage

The 2025 data shows a significant escalation in both the breadth and depth of GenAI adoption compared to 2024, with clear shifts toward more advanced and varied use cases. While content generation continues to lead as the most widely adopted application, the data highlights growing interest in machine learning, predictive analytics, and code generation, marking a shift from experimentation toward more strategic, data-driven deployments.





Text generation: From leading category to near-universal adoption

In 2024, 33.3% of respondents reported using GenAI for text and written content creation, with this category already standing out as the most adopted type of GenAI. In 2025, this figure has surged to 66% currently using, with the remaining 34% planning or considering its use. The absence of any respondents selecting "not using and not planning to use" highlights text generation's position as the most universally appealing and accessible application of GenAI, adopted across a wide variety of business functions from marketing to operations.

Analytics and machine learning: Major growth areas

A major difference between 2024 and 2025 lies in the rise of predictive analytics and machine learning as prominent GenAI use cases. While these categories were not explicitly broken out in the 2024 survey, related activities such as neural network creation saw relatively low current use (11.1%) last year. In contrast, 2025 results show 60% of respondents currently using predictive analytics and 48% using machine learning, with the remainder in both categories planning or considering adoption. This sharp increase signals a strategic pivot among organisations towards leveraging GenAI not just for content creation but for data-driven decision-making, forecasting, and model-based optimisation.

The broad interest in machine learning (100% when combining current use and plans) represents one of the strongest indicators of GenAI's evolution from creative augmentation to core business capability.

Code generation and chatbots: Steady growth in practical applications

Code generation, used by 36% in 2025 with another 58% planning or considering its use, shows continued growth from 24.4% in 2024. This steady rise demonstrates how GenAI is being embedded into software development workflows, supporting automation, rapid prototyping, and efficiency gains in technical teams.

Chatbots also show moderate growth from 21.1% usage in 2024 to 28% in 2025, with a striking 72% considering or planning their use. The consistently high level of interest suggests that conversational AI remains a key area for customer engagement, although full implementation still appears to be progressing cautiously.

Creative media use cases: Planning outweighs current adoption

While image, video, and audio creation saw notable usage in 2024 (23.3% for both image and audio, 27.8% for video), current use levels in 2025 are lower, at 12%, 10%, and 6% respectively. However, a large proportion of respondents continue to express plans or interest in these areas, especially for video creation (62% planning or considering) and image creation (52%).

This pattern suggests that while enthusiasm for creative media remains, many organisations may be holding back from full-scale deployment, potentially due to resource constraints, content quality concerns, or the need for clearer use cases and ROI.

Notably, audio creation stands out as the least prioritised area in 2025, with 72% of respondents stating they are not using and not planning to use it – despite its higher adoption rate in 2024. This suggests a cooling of interest in this specific application, perhaps due to limited perceived value or satisfaction with existing non-AI tools.

Advanced capabilities: Still niche but on the radar

3D modelling and rendering, which was not captured explicitly in the 2024 survey, shows low current adoption at 4% but notable interest, with 44% planning or considering use. This aligns with the earlier finding in 2024 where engineering design was one of the least-used applications (7.8%). The results suggest that while these advanced applications remain niche, there is growing curiosity, particularly in sectors such as manufacturing, design, and construction.

Evolving patterns of GenAI adoption

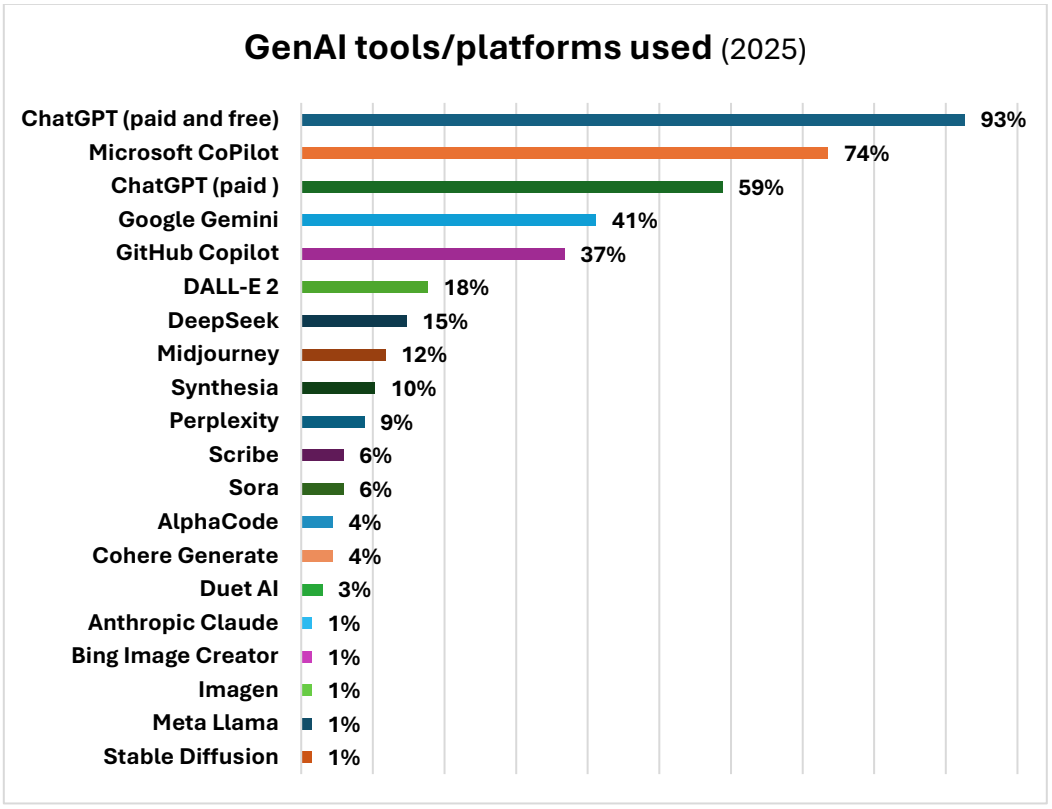
The 2025 data underscores an important shift: organisations are moving from experimenting primarily with content generation toward integrating GenAI into core business functions such as analytics, machine learning, and coding workflows. Creative media tools continue to attract interest but face slower actual deployment, while advanced use cases like 3D modelling remain niche but on the horizon for many.

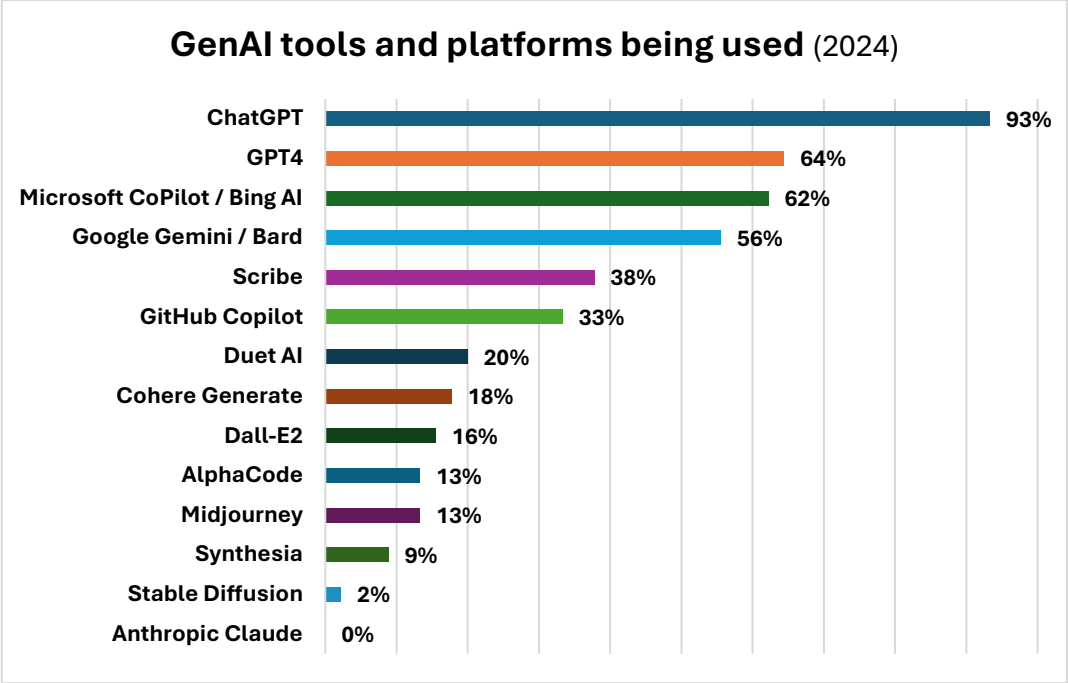
Compared to 2024, the increase in strategic and data-oriented GenAI applications reflects a maturing landscape where businesses are no longer just exploring what GenAI can do – they are actively working to deploy it where it can offer tangible, operational benefits.

This shift highlights the growing sophistication of GenAI strategies and the rising importance of skills development, governance, and clear use cases as enablers of successful adoption.

GenAI tools and platforms

The 2025 data on GenAI tool usage shows both continuity and strategic shifts in platform preferences compared to 2024. While many of the same tools remain popular, the results highlight a maturing and more segmented GenAI ecosystem, with some platforms consolidating their role, new entrants fragmenting the market, and others declining in relevance.





ChatGPT remains dominant

ChatGPT continues to lead the GenAI landscape with a combined usage rate of 93% – unchanged from 2024. The 2025 data reveals a split between paid (59%) and free (34%) tiers. This segmentation indicates a more structured adoption curve, with many companies willing to invest in advanced features, while others continue to rely on the free tier. The stable overall usage shows that ChatGPT remains foundational to many organisations' GenAI strategies, even as the ecosystem expands.

Microsoft Copilot: top single-tier tool, growing fast

With 74% adoption in 2025 – up from 62% in 2024 – Microsoft Copilot continues to expand its reach, ranking just behind the combined usage of ChatGPT. Its strong showing reflects deep integration into Microsoft's productivity suite, giving it a significant advantage among enterprise users who prefer tools embedded directly into their existing workflows. This growth highlights a broader shift in favour of GenAI solutions that are seamlessly integrated into business ecosystems, rather than accessed as standalone applications.

Google Gemini stabilises, GitHub Copilot grows steadily

Google Gemini (formerly Bard) now stands at 41% usage, down from 56% in 2024. This decline may be tied to branding transitions or intensified competition from Microsoft and OpenAI. Still, it remains one of the more widely adopted tools.

GitHub Copilot has grown steadily from 33% to 37%, signalling consistent interest from software development teams. Its focused use case – coding assistance – has helped it maintain a strong presence as a task-specific GenAI application.

Creative tools: modest growth, still niche

Visual content generators like DALL-E 2 (18%), Midjourney (12%), and Synthesia (10%) remain niche, with limited but stable uptake. These tools are valued in specific creative and marketing contexts but haven't crossed into broad enterprise adoption.

Tools like Stable Diffusion (1%) and Bing Image Creator (1%) continue to show minimal traction. Their limited usage reflects their positioning as either experimental or too specialised for general corporate needs.

Emerging entrants and the rise of fragmentation

Several new platforms made their debut in the 2025 data, reflecting increasing fragmentation of the GenAI toolscape. Notable entries include DeepSeek (15%), Perplexity (9%), and Sora (6%), each gaining moderate usage. These tools are likely appealing to specific niches or emerging use cases.

Other newer or niche tools such as AlphaCode (4%), Cohere Generate (4%), Duet AI (3%), Anthropic Claude (1%), Meta Llama (1%), and Imagen (1%) show low but visible adoption, potentially indicating early-stage experimentation or limited awareness.

Scribe's sharp decline stands out

One of the most notable shifts is the dramatic decline of Scribe, which fell from 38% usage in 2024 to just 6% in 2025. This drop may reflect a loss of relevance, supersession by better-integrated alternatives, or strategic shifts within organisations toward more multi-functional tools. Scribe's drop suggests that some formerly popular platforms are being actively phased out as GenAI strategies mature.

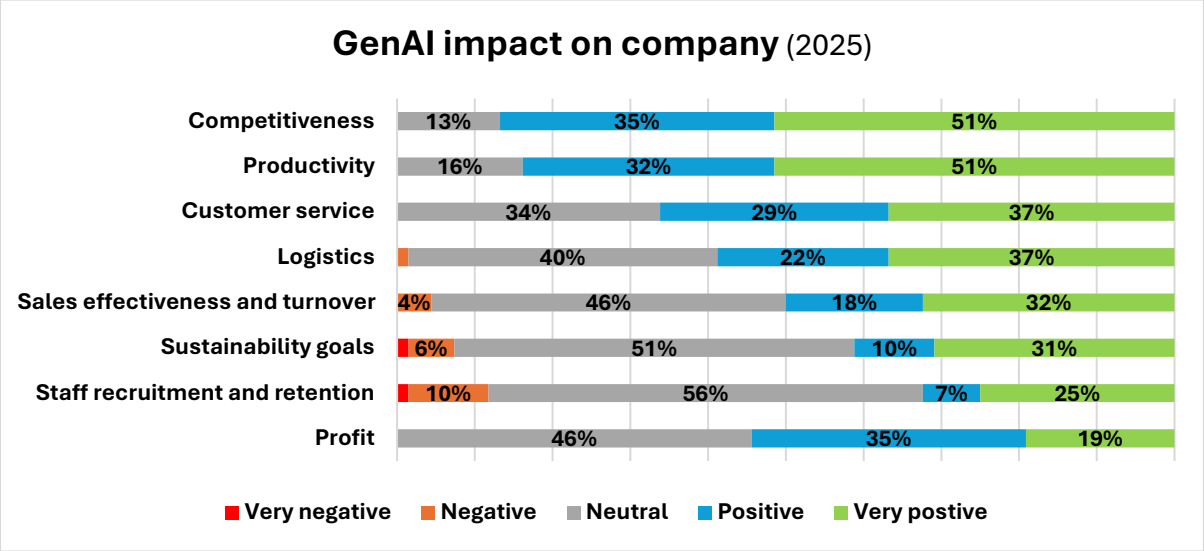
Consolidation and experimentation define 2025 trends

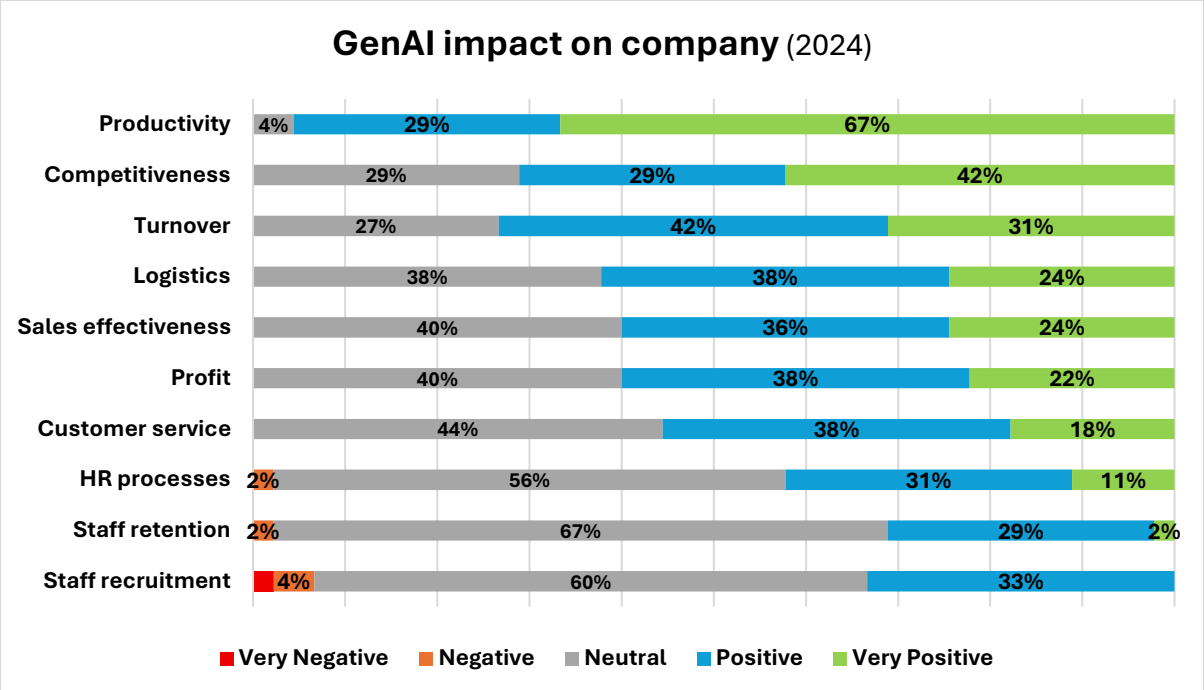
Taken together, the data reveals two simultaneous dynamics. First, there is a consolidation around major platforms like ChatGPT, Microsoft Copilot, Google Gemini, and GitHub Copilot – tools that offer robust ecosystems and enterprise-grade integration. Second, there's a clear pattern of experimentation, with organisations continuing to trial emerging tools like DeepSeek and Perplexity for more targeted use cases.

However, the plateauing of creative tools and the sharp drop in Scribe usage show that companies are refining their GenAI portfolios – shifting focus from exploratory adoption to consistent value delivery. As the landscape matures, organisations appear to be concentrating on fewer, more impactful tools tailored to specific functions and integrated deeply into their workflows.

Impact of GenAI on business functions

The 2025 data on the perceived impact of GenAI across different business functions reinforces several patterns observed in 2024 while revealing some shifts in sentiment and priority areas. Productivity and competitiveness continue to stand out as the most positively affected areas, though responses suggest that the depth of impact varies widely across different aspects of business operations.





Productivity and competitiveness: Consistently strong areas of impact

As in 2024, productivity and competitiveness remain the two areas where GenAI is seen as having the greatest positive influence. In 2025, 51% of respondents rate GenAI's impact on productivity as very positive and 32% as positive, closely matching last year's combined 96% positive sentiment. This suggests a sustained belief that GenAI is highly effective at streamlining workflows, reducing repetitive tasks, and enhancing operational efficiency.

For competitiveness, 51% of respondents rate the impact as very positive and 35% as positive, compared to 42% and 29% in 2024 respectively. This growth points to an increasing recognition that GenAI is not just about internal efficiencies but also about positioning companies to compete more effectively in their markets – whether through faster innovation, better customer insights, or enhanced product offerings.

Customer service and logistics: Improvements seen, but tempered by neutrality

In customer service, 37% of respondents now view GenAI's impact as very positive, up from 18% in 2024, suggesting growing confidence in the role of GenAI-powered chatbots, recommendation systems, and automated support. However, a sizable 34% remain neutral, indicating that while some organisations are seeing clear benefits, others may still be in the early stages of realising these gains or may not yet have effective GenAI applications in customer-facing roles.

Logistics similarly shows a positive trend, with 37% rating the impact as very positive and 22% as positive, though 40% remain neutral and 1% express a negative view. These results align with 2024's positive sentiment around supply chain and operational efficiencies, though they continue to reflect uneven adoption or perhaps limited maturity of GenAI in this domain.

Sales, turnover, and profit: Positive but less strongly endorsed

For sales effectiveness and turnover, 32% rate the impact as very positive and 18% as positive, but a significant 46% select neutral, and 4% rate the impact as negative. Compared to the 73% positive sentiment on turnover in 2024, these results indicate that while some companies are seeing benefits, the direct financial outcomes may not yet be consistent across the board.

The pattern is similar for profit, where 19% rate the impact as very positive and 35% as positive, while 46% remain neutral. This mirrors the 2024 finding that profit was one of the less strongly impacted areas, despite improvements in productivity and competitiveness. The ongoing gap between operational gains and financial outcomes may reflect either delayed realisation of profit impacts or difficulty attributing profitability directly to GenAI use.

Sustainability and HR: Persistent challenges in realising GenAI benefits

In the area of sustainability goals, positive sentiment remains lower, with 31% rating the impact as very positive and 10% as positive, while 51% remain neutral and 7% register negative or very negative sentiment. The relatively low impact perception here suggests that while GenAI may assist in data analysis or optimisation relevant to sustainability, its role is still emerging in this space.

Staff recruitment and retention, alongside HR processes, continues to be rated as the least positively impacted area. Only 25% rate GenAI's impact here as very positive, with 7% positive, 56% neutral, and 11% negative or very negative. These results suggest that while automation and augmentation may support some hiring processes, they have not yet fundamentally reshaped talent strategies for most organisations.

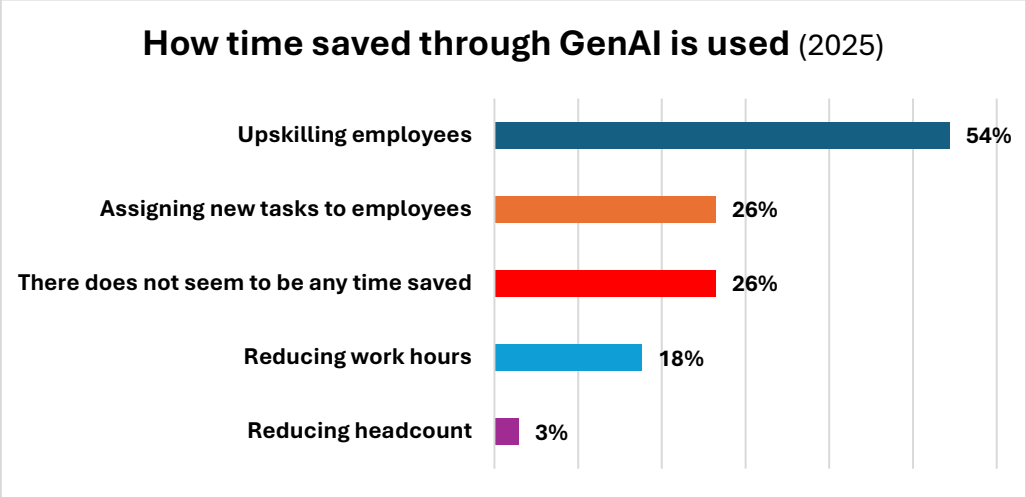
Uneven distribution of GenAI benefits

The 2025 results confirm that productivity and competitiveness remain the areas where GenAI delivers the clearest and strongest perceived value, consistent with the previous year. However, the continued neutrality across other domains like profit, sales effectiveness, logistics, and customer service highlights that the business value of GenAI remains unevenly distributed across functions.

The data suggests that while operational efficiencies are being realised, broader strategic gains – such as those tied to financial performance, customer engagement, or talent management – are either slower to emerge or harder to measure directly. This reinforces the need for organisations to focus not only on adoption but also on defining clear objectives and metrics for GenAI initiatives across different parts of the business.

How time saved through GenAI is used

The 2025 data offers insight into how organisations are handling one of the key promises of GenAI: saving time by automating or accelerating tasks. While the expectation is often that GenAI will free up employee capacity, the findings suggest that companies are taking varied approaches to managing this time, with a strong focus on reinvestment into employee development rather than direct cost-cutting measures.



The most common approach, reported by 54% of respondents, is upskilling employees with the time saved. This indicates that many organisations are choosing to reinvest GenAI-generated efficiencies back into their workforce by focusing on skill enhancement and capability building. This strategy aligns with the broader trend observed in the survey around training and skills development as enablers of GenAI adoption. It suggests that companies see value not just in automating tasks, but in empowering their teams to take on more complex or higher-value activities.

Assigning new tasks to employees was selected by 26% of respondents, showing that some organisations are repurposing saved time toward other priorities, potentially expanding the scope of work rather than reducing workloads. This reflects an approach where GenAI acts as a productivity enhancer, allowing employees to handle broader responsibilities rather than reducing their overall input.

However, 26% of respondents indicate that there does not seem to be any time saved through their GenAI deployment. This finding highlights a critical reality: despite expectations, not all implementations of GenAI immediately result in noticeable efficiency gains. This may reflect early-stage deployments, suboptimal use cases, or mismatches between tool capabilities and business needs. It serves as a reminder that while GenAI holds strong potential for productivity improvements, realising these gains depends heavily on thoughtful implementation and alignment with operational processes.

Interestingly, reducing work hours is reported by 18% of respondents. This suggests that a minority of organisations are exploring ways to translate efficiency into work-life balance

improvements, either through shorter workweeks, flexible schedules, or reduced overtime. While not the dominant strategy, this approach reflects emerging conversations about how automation might support more sustainable work models.

At the other end of the spectrum, only 3% of respondents report reducing headcount as a result of GenAI time savings. This low figure counters common fears around widespread job losses due to AI automation and suggests that, at least among the organisations surveyed, GenAI is more often used to augment existing teams rather than replace them.

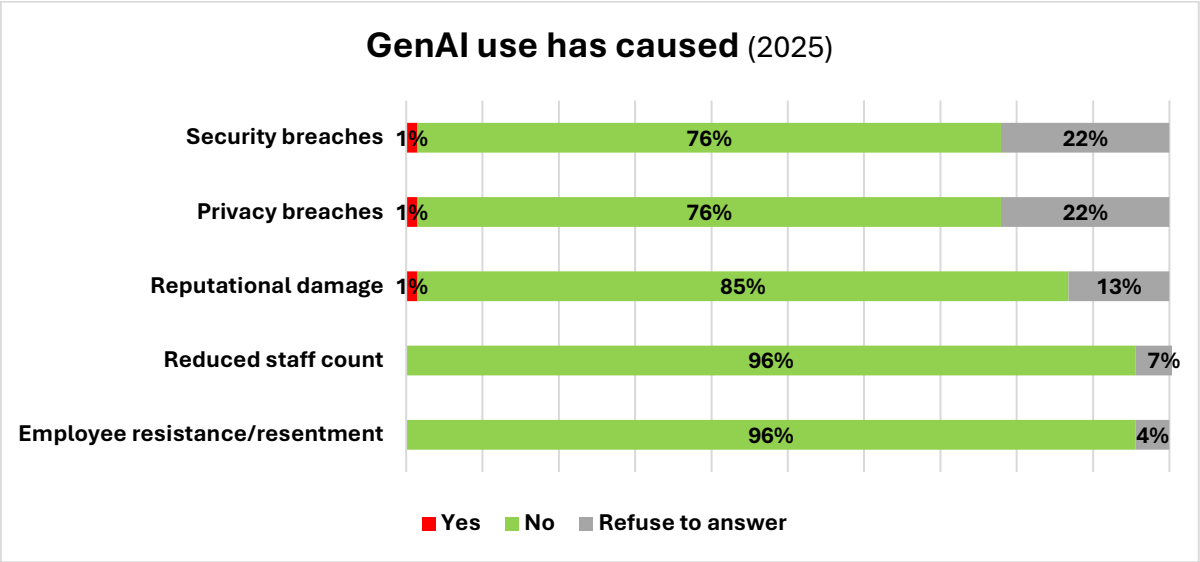
Reinvestment over reduction: The dominant approach

The data clearly shows that most companies are favouring reinvestment of saved time into employee development and broader task allocation, rather than cost-cutting through headcount reduction. However, the notable proportion of organisations reporting no observable time savings also points to challenges in realising the full promise of GenAI's efficiency benefits.

These findings underline the importance of clear adoption strategies, effective implementation, and realistic expectations when deploying GenAI solutions. Simply introducing GenAI tools does not automatically guarantee productivity gains; how organisations choose to deploy these tools – and how they manage the capacity they create – remains a crucial factor in determining the real business impact.

GenAI use has caused

The 2025 data on negative outcomes associated with GenAI deployment suggests that while incidents such as security breaches, privacy violations, and reputational damage remain rare, they have not been entirely absent from the GenAI adoption journey. Notably, the data also points to a consistent pattern: where issues have occurred, they are tied to unauthorised usage of GenAI tools, highlighting ongoing challenges around governance and compliance.



Security and privacy breaches remain low, but not eliminated

In 2025, 1% of respondents report experiencing security breaches as a result of GenAI use, with the same proportion (1%) reporting privacy breaches. While these are very small percentages, the fact that such incidents persist – even at low levels – underscores that GenAI introduces potential vulnerabilities, particularly when tools are used outside of approved channels.

This marks a decline from 2024, where 4% reported security breaches and 5% reported privacy breaches. The reduction suggests that organisations may be improving their oversight and governance of GenAI use. However, the continued presence of these risks – even at reduced levels – signals that shadow AI (unofficial or unsanctioned use) remains a key concern, and that effective enforcement of usage policies is still a work in progress for many companies.

Additionally, a notable share of respondents in 2025 (22%) chose to refuse to answer regarding security and privacy incidents, a sharp increase from 11% in 2024. This rise in non-disclosure may reflect growing sensitivity around these issues, either due to internal policy restrictions or reputational concerns about admitting such incidents.

Reputational damage remains rare but possible

Reputational damage was reported by 1% of respondents in 2025, similar to the 1% reported in 2024. While this remains a very low incidence rate, the fact that reputational risks were acknowledged in both years reinforces the need for careful content management, oversight of AI outputs, and clear guidelines for public-facing uses of GenAI.

Interestingly, the percentage of respondents refusing to answer on this point increased slightly to 13% in 2025 from 11% in 2024, suggesting a modest rise in caution or sensitivity when discussing reputational concerns.

No significant impact on headcount or employee relations

Concerns about job losses linked to GenAI adoption, often discussed in broader industry narratives, are not reflected in the data. In 2025, 0% of respondents reported reduced staff count as a result of GenAI deployment, consistent with the 1% who reported this in 2024. This supports the broader trend observed elsewhere in the survey that companies are largely choosing to reinvest time savings into upskilling or reallocation of tasks rather than reducing headcount.

Similarly, employee resistance or resentment remains minimal. In 2025, 0% reported either employee resistance or resentment, down from 5% (resistance) and 0% (resentment) in 2024. This may suggest that as GenAI adoption has matured, organisations have either improved their communication and change management efforts, or that initial fears among staff have diminished as the practical impacts of GenAI have become clearer.

The unauthorised use factor: Shadow AI remains the risk vector

It is important to highlight that in both 2024 and 2025, all reported negative incidents – whether breaches, reputational damage, or employee-related issues – were attributed to unauthorised use of GenAI tools. This consistent finding underscores that governance, policy enforcement, and user education remain critical elements in mitigating risks. Even as official adoption increases and strategies become more formalised, shadow AI continues to present one of the most significant sources of exposure for organisations.

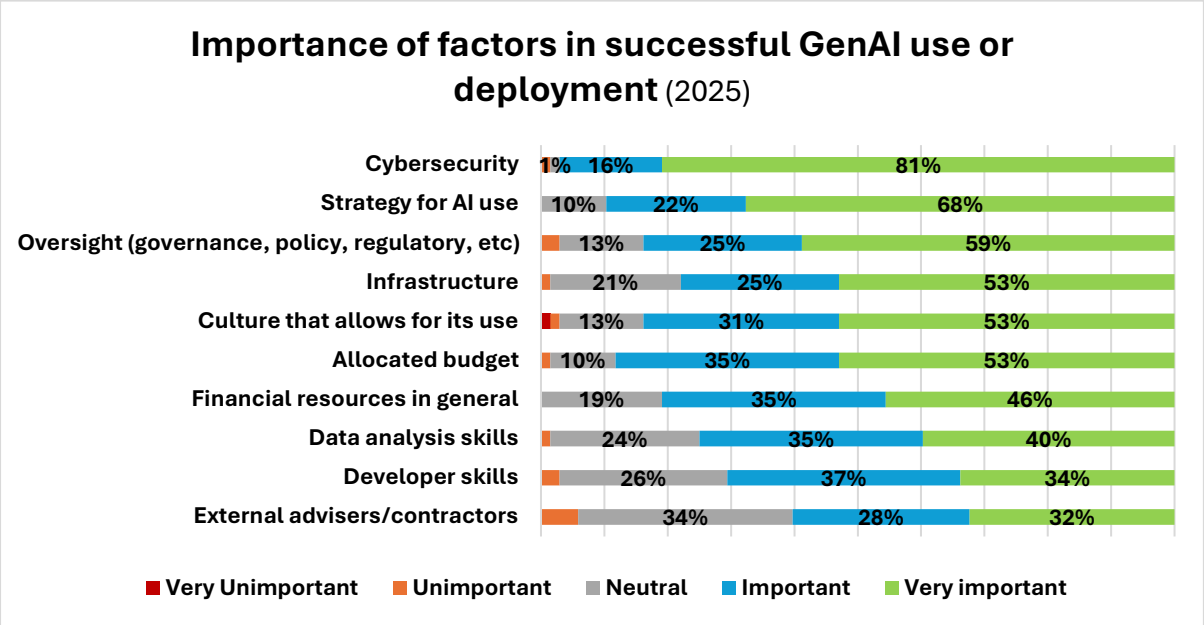
Risks remain low but demand continued vigilance

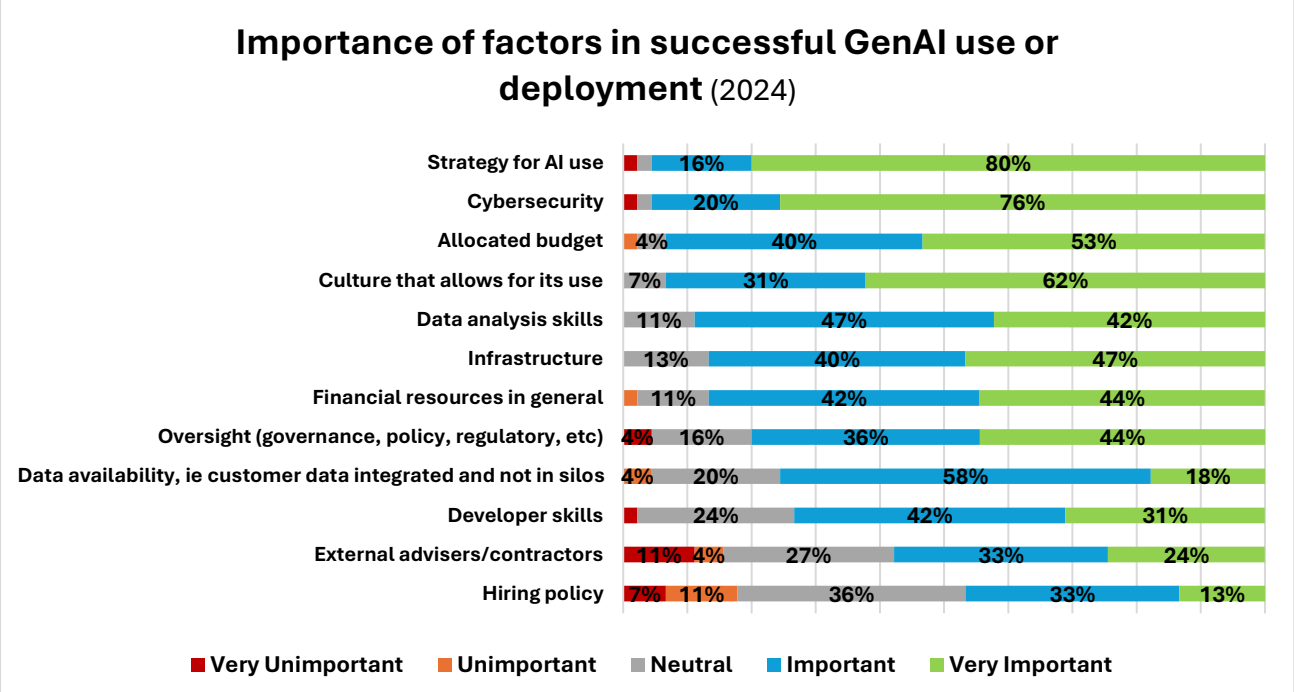
The 2025 findings confirm that the incidence of negative outcomes from GenAI remains low overall, but that unauthorised usage continues to be the common factor when incidents do occur. The small but persistent number of security, privacy, and reputational issues highlights the importance of moving beyond policy creation toward active monitoring, enforcement, and employee awareness.

As GenAI tools become more embedded in everyday workflows, organisations will need to sustain and strengthen their governance frameworks to ensure that adoption remains safe, compliant, and strategically beneficial, without exposing the business to preventable risks.

Importance of factors in successful GenAI use or deployment

The 2025 data on success factors for GenAI deployment reinforces many of the trends observed in 2024, with a few notable shifts in the perceived importance of specific elements. Strategy, cybersecurity, and governance remain at the forefront of what companies consider essential for the successful use of GenAI, while the importance of culture, skills, and external support shows a more varied response.





Strategy and cybersecurity remain critical

Cybersecurity has retained – and even slightly strengthened – its position as the most critical factor, with 81% rating it very important in 2025, up from 76% in 2024. Only 1% view it as unimportant, with a further 1% neutral, highlighting near-universal recognition of its importance. This reflects sustained concern over risks such as shadow AI, data breaches, and AI misuse, especially as adoption broadens across business functions.

As in 2024, a clear strategy for AI use continues to be viewed as one of the most important enablers for successful GenAI deployment. In 2025, 68% of respondents rate strategy as very important, with an additional 22% calling it important. Although this is a slight drop from the 80% very important reported in 2024, the combined importance remains strong. This may reflect growing maturity in GenAI adoption – where organisations are shifting from strategy formulation to execution and balancing strategy with operational enablers like infrastructure and skills.

Rise of governance and oversight

Oversight, including governance, policy, and regulatory frameworks, has grown in perceived importance. In 2025, 59% of respondents rated oversight as very important, with another 25% calling it important. This marks a meaningful rise from 2024, when governance was grouped with infrastructure and financial resources, and seen as lower priority. The increase indicates that as GenAI scales, companies are recognising the need for formal accountability structures and ethical safeguards to guide its use.

Infrastructure and budget: Stable importance

Infrastructure remains a cornerstone of successful GenAI deployment, with 53% rating it very important and 25% as important in 2025 – up from 47% very important in 2024. This continued emphasis reflects the need for scalable, secure, and reliable tech stacks to support growing GenAI applications.

Similarly, allocated budget is still viewed as essential, with 53% rating it very important and 35% as important. These findings mirror 2024 data, underscoring that financial commitment remains central not only for implementation, but also for long-term governance, training, and iteration.

Financial resources in general are also well regarded, with 46% rating them very important and 35% important. Though slightly behind budget-specific support, this reflects ongoing recognition that GenAI success requires investment beyond immediate tooling – spanning data pipelines, security, and staffing.

Culture: Still valued but less dominant

A culture that allows for GenAI use was rated very important by 53% in 2025, down from 62% in 2024. Another 31% rated it important. While still significant, the decline suggests that as adoption matures, fewer organisations view culture as the main barrier – shifting instead toward enabling mechanisms like oversight, infrastructure, and workforce readiness.

Skills: Growing differentiation between roles

Data analysis skills remain critical, with 40% rating them very important and 35% important. While slightly lower than the combined 89% positive sentiment in 2024, the continued emphasis suggests these capabilities are still core to effective GenAI use, particularly where decision-making and model interpretation are concerned.

Developer skills received a more balanced response, with 34% rating them very important and 37% important. This may reflect greater reliance on off-the-shelf tools and platforms, reducing pressure for deep in-house model-building capabilities in favour of operational integration and prompt engineering.

External advisers: Still a low priority

As in 2024, external advisers and contractors are considered lower priority, with only 32% rating them very important and a relatively high 34% neutral. This suggests that most organisations prefer to build internal capabilities rather than relying heavily on outside support – especially as GenAI becomes more embedded in daily operations.

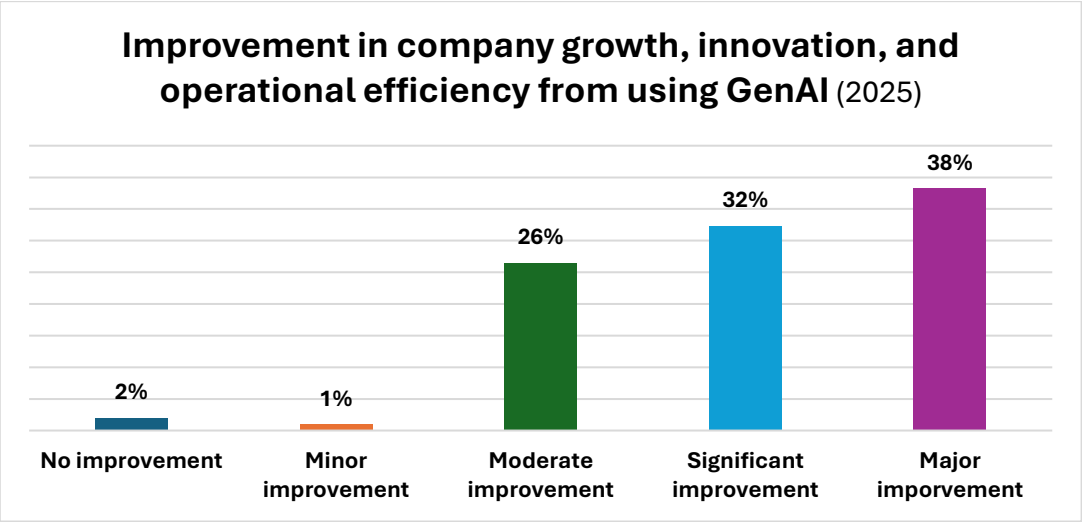
Key shifts and stability in success factors

The 2025 data confirms that strategy, cybersecurity, governance, and infrastructure remain the core pillars of successful GenAI deployment. Culture and skills continue to matter, but their relative importance appears to have softened slightly as organisations grow more comfortable with GenAI in practice.

The rise in prioritisation of governance and oversight is particularly notable, signalling a shift from experimentation to institutionalisation – as companies put in place formal mechanisms for safe, ethical, and scalable adoption. Meanwhile, the continued lower priority placed on external advisers suggests that GenAI maturity is increasingly internalised, with companies choosing to embed knowledge rather than outsource expertise.

GenAI's perceived potential for growth, innovation, and operational efficiency

The 2025 data shows a strong belief among organisations in the transformative potential of GenAI, particularly in enhancing growth, innovation, and operational efficiency. The responses reflect a high level of optimism, with the vast majority of respondents expecting GenAI to deliver either significant or major improvements to their business outcomes.



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A combined 70% of respondents rate GenAI's expected contribution as either a major improvement (38%) or a significant improvement (32%), underscoring widespread confidence in the value of GenAI beyond isolated use cases. This suggests that for many organisations, GenAI is not viewed merely as a supporting tool but as a core enabler of future competitiveness, innovation, and process optimisation.

A further 26% see GenAI providing a moderate improvement, indicating that while they recognise the potential, these organisations may either be at earlier stages of adoption or anticipate that gains will be more incremental rather than transformative in the short term.

Only 1% describe the expected impact as a minor improvement, and just 2% believe there will be no improvement at all. These small percentages highlight the near-universal expectation that GenAI will play a positive role in shaping the future performance of businesses, regardless of their current level of adoption.

Strong belief in value, but tempered by realism for some

The distribution of responses suggests that while enthusiasm for GenAI remains high, there is also a degree of measured realism. The notable share of respondents selecting moderate improvement points to an awareness that success with GenAI may depend on factors such as the quality of implementation, the availability of skills, the alignment of use cases with business goals, and the maturity of supporting infrastructure and governance.

This balance of optimism with caution reflects the broader trends seen across the survey, where many organisations are actively adopting or planning to adopt GenAI but are also grappling with barriers such as cost, skills shortages, and governance challenges.

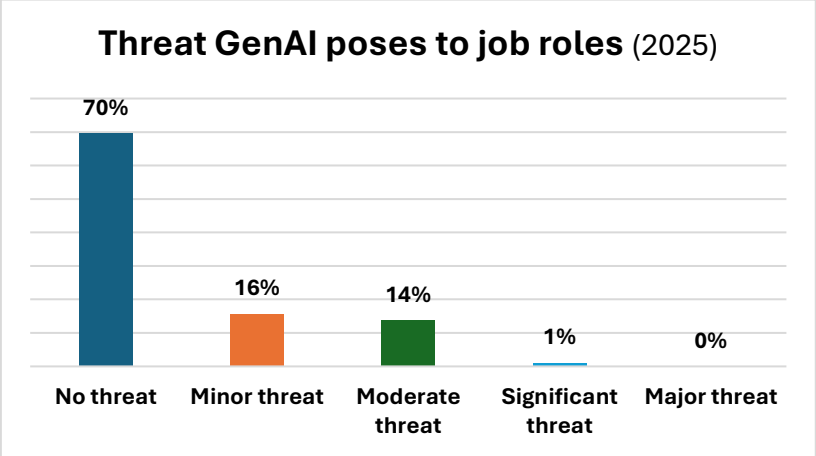
Implications for future strategy

The strong belief in GenAI's potential to enhance growth, innovation, and efficiency supports the case for sustained investment in GenAI strategy, skills development, and risk management. The high expectations also suggest that organisations will need to carefully monitor outcomes and measure success against these ambitions to ensure that the technology delivers on its promise.

As adoption continues to mature, these perceptions may evolve, depending on how well GenAI initiatives are executed and how effectively companies manage the balance between experimentation and structured deployment.

Threat of GenAI to job roles

The 2025 data reveals that while organisations are broadly optimistic about the benefits of GenAI, concerns about its potential to threaten job roles remain relatively limited. The majority of respondents believe that GenAI adoption does not significantly endanger employment within their organisations, reflecting a dominant view of GenAI as a tool for augmentation rather than replacement.



A substantial 70% of respondents rate GenAI as posing no threat to job roles, indicating widespread confidence that the technology will complement rather than displace human workforces. This aligns with other findings in the survey, such as the low incidence of reported staff reductions and the preference for reinvesting time savings into upskilling and task reassignment rather than headcount reduction.

An additional 16% view GenAI as a minor threat, suggesting that while some job functions may face limited automation or reshaping, the overall impact on employment is expected to be small. 14% of respondents perceive a moderate threat, indicating that in certain areas or roles, there is recognition that GenAI could lead to more noticeable changes in workforce requirements, particularly where tasks are highly repetitive or rule-based.

At the higher end of the scale, only 1% of respondents identify a significant threat, and 0% report a major threat. These low figures further reinforce the view that widespread displacement of jobs by GenAI is not anticipated by most organisations at this stage of adoption.

Augmentation over automation

The data reflects a consistent narrative emerging across the survey: GenAI is largely seen as a supportive technology that enhances productivity, innovation, and operational efficiency, rather than a disruptive force aimed at replacing human labour. The emphasis on skills development, task reallocation, and employee upskilling reported elsewhere in the survey supports this view, indicating that most companies are using GenAI to free up capacity for higher-value activities rather than to drive downsizing.

Perception gap and future considerations

While the current perception of job security is strong, the 14% moderate threat figure suggests that some respondents do foresee the potential for more significant workforce impacts, depending on how GenAI capabilities evolve and how organisations choose to apply them. Roles that involve routine information processing, manual data handling, or repetitive content creation may remain areas of vulnerability as automation advances.

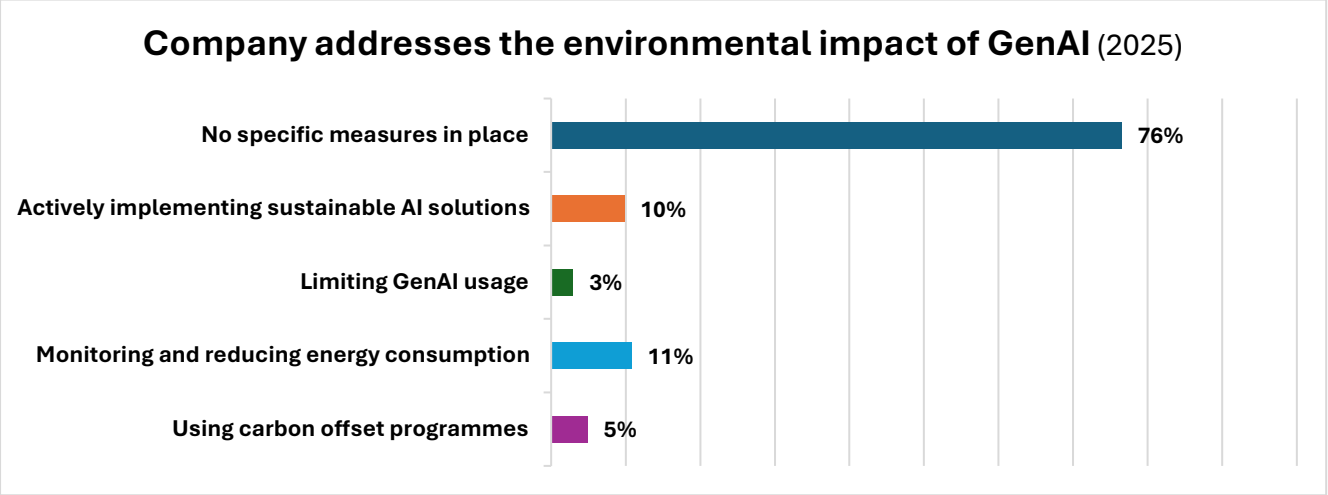
This finding highlights the importance of proactive workforce planning and transparent communication within organisations. Even where the perceived threat is low today, continued investment in reskilling and employee engagement will be critical to maintaining this positive outlook as GenAI tools become more sophisticated.

Stability, not fear, characterises current attitudes

The results suggest that fears of job displacement by GenAI remain largely unfounded among respondents, with the technology viewed more as an enabler than a disruptor. However, the presence of a small but notable segment seeing moderate threat signals that vigilance and thoughtful workforce strategies remain important to ensure GenAI's adoption delivers shared benefits across organisations.

Addressing the environmental impact of GenAI

The 2025 data on how organisations address the environmental impact of GenAI usage reveals that sustainability considerations are still largely absent from most GenAI strategies. Despite increasing global attention on the energy demands of AI models and data centres, the majority of companies report that they have not yet taken concrete steps to mitigate the environmental footprint of their GenAI activities.



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A striking 76% of respondents state that their organisation has no specific measures in place to address the environmental impact of GenAI. This suggests that for most businesses, environmental sustainability is not yet a formal part of their GenAI planning or governance, despite the well-documented energy consumption associated with large language models and generative AI systems.

Limited action among those engaging with sustainability

Among the minority of organisations that are taking steps, 11% report monitoring and reducing energy consumption linked to their GenAI use. This could involve choosing more energy-efficient models, optimising cloud usage, or evaluating the carbon footprint of AI processes. However, the relatively small share of companies engaged in these activities suggests that energy efficiency is not yet a widespread priority when deploying GenAI tools.

Only 10% of respondents say they are actively implementing sustainable AI solutions. These measures may include selecting AI models designed to be less resource-intensive, working with cloud providers that offer green energy options, or integrating sustainability criteria into AI procurement and deployment decisions.

Carbon offset programmes are used by just 5% of respondents. This option, while not reducing direct energy usage, indicates that a small number of companies are at least seeking to counterbalance their environmental impact through carbon credit schemes or similar initiatives.

A further 3% report that they are limiting GenAI usage specifically to reduce environmental impact. This approach suggests an intentional decision to constrain the scale or frequency of GenAI use where the environmental cost is deemed too high, though it remains a rare practice among respondents.

Sustainability not yet aligned with GenAI governance

The data highlights a clear gap between GenAI adoption and environmental responsibility. While organisations are increasingly investing in governance, security, and oversight of GenAI (as seen in other parts of the survey), sustainability considerations appear to lag behind. This may reflect a lack of awareness about the environmental implications of GenAI, or competing priorities where business performance and security dominate attention.

The absence of widespread action also suggests an opportunity for improvement. As regulatory scrutiny around AI expands and as sustainability becomes a more central business concern globally, organisations may face growing pressure to incorporate environmental factors into their GenAI strategies.

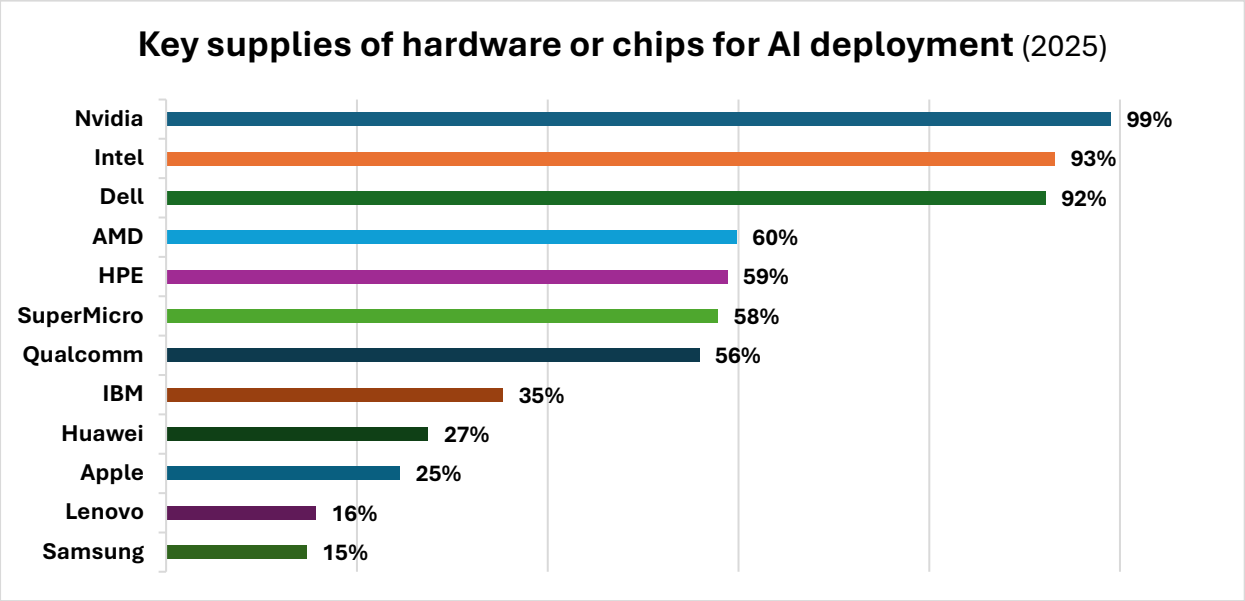
Environmental impact: A growing blind spot in GenAI strategies

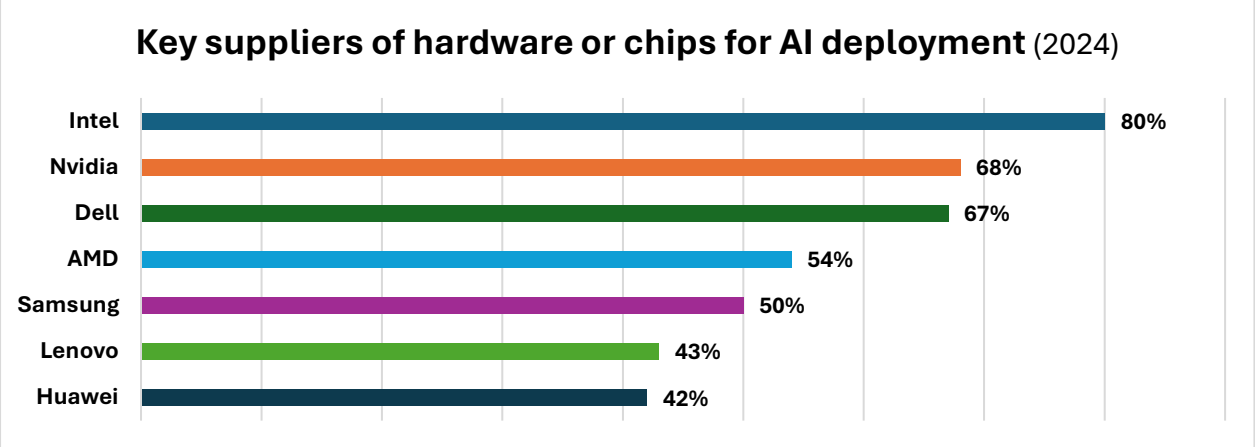
The 2025 findings indicate that while GenAI adoption is advancing across industries, sustainability is not yet a key focus for most organisations deploying these technologies. With only a small minority taking active steps to address energy consumption or carbon impact, there remains significant room for companies to align their AI strategies with broader environmental goals.

Going forward, integrating energy efficiency metrics, green procurement policies, and carbon-conscious deployment practices could become an important aspect of responsible GenAI adoption – particularly as awareness of AI's environmental footprint continues to grow.

Key hardware and chip suppliers for AI

The 2025 data on key suppliers of hardware and chips for AI deployment shows a clear reshaping of the competitive landscape, with Nvidia emerging as the leader, but followed closely by Intel and Dell. While many of the top players from 2024 remain central to the conversation, the results highlight significant changes in how organisations perceive the relevance and influence of different suppliers as AI adoption continues to scale.





In 2025, 99% of respondents identify Nvidia as a key supplier for AI hardware – up sharply from 68% in 2024. This near-universal recognition cements Nvidia in the space, driven by the critical role of its GPUs in powering generative AI, deep learning, and large language model (LLM) training.

Intel, which held the leading position in 2024 with 80%, remains highly relevant in 2025 at 93%. The sustained high recognition reflects Intel's continued investment in AI chipsets and server-grade processors. However, the data suggests that while Intel remains critical for general

compute infrastructure, Nvidia's specialist AI hardware has become the preferred choice for GenAI-specific workloads.

Dell continues to be regarded as a major player, identified by 92% of respondents in 2025, up from 67% in 2024. This rise highlights Dell's strong position in enterprise server solutions, storage systems, and integrated AI infrastructure offerings, supporting organisations' growing demand for scalable and reliable GenAI deployment platforms.

AMD rises to 60% in 2025 from 54% in 2024, reflecting its steady push into AI-ready processors and its competitive positioning against Intel. The incremental growth suggests that AMD continues to benefit from improvements in its CPU and GPU offerings but still trails Nvidia significantly in AI-specific recognition.

Notably, HPE (59%) and SuperMicro (58%) emerge as significant players in the 2025 data, though they were not highlighted in the 2024 results. Their presence signals growing recognition for server manufacturers that provide high-performance, AI-optimised infrastructure, particularly in cloud, hybrid, and edge environments where GenAI workloads are increasingly being deployed.

Qualcomm, identified by 56% of respondents, also makes a strong appearance, likely benefiting from its focus on edge AI and mobile AI chipsets, an area seeing growing interest as companies explore GenAI beyond the data centre.

In contrast, Samsung, which was recognised by 50% in 2024, has dropped significantly to 15% in 2025. Similarly, Lenovo has fallen from 43% to 16%, and Huawei from 42% to 27%. These declines suggest that while these companies remain relevant in broader technology markets, they are now perceived as playing a less central role in GenAI-specific hardware supply. This may reflect a shift in focus toward suppliers more directly associated with AI acceleration technologies rather than general-purpose hardware.

IBM is acknowledged by 35% of respondents, indicating some recognition of its AI infrastructure and chip capabilities, though it remains below the top-tier group. Apple, cited by 25%, suggests some awareness of its in-house AI chips – primarily for devices and on-device AI – but its role in enterprise GenAI infrastructure remains limited.

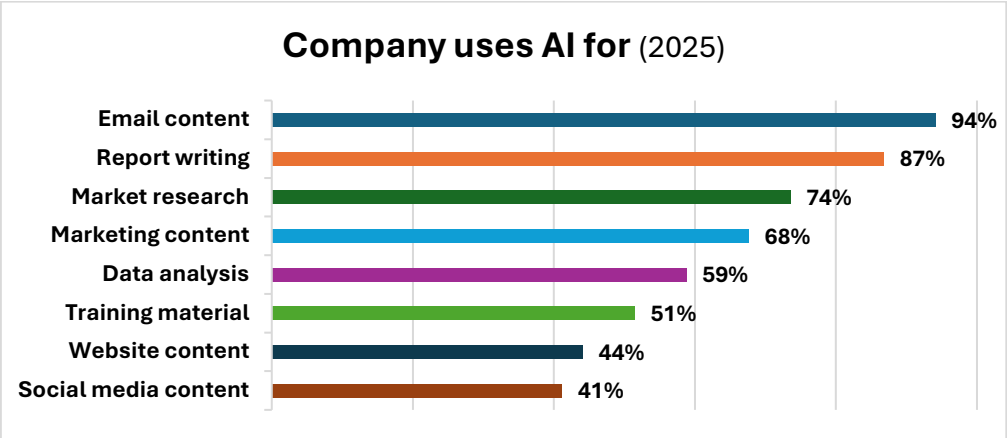
The 2025 data shows a significant consolidation of supplier recognition around Nvidia, Intel, and Dell, while newer entries like HPE, SuperMicro, and Qualcomm reflect the expanding complexity and diversity of the GenAI hardware ecosystem. At the same time, traditional suppliers such as Samsung, Lenovo, and Huawei have seen notable declines in perceived relevance for GenAI hardware specifically.

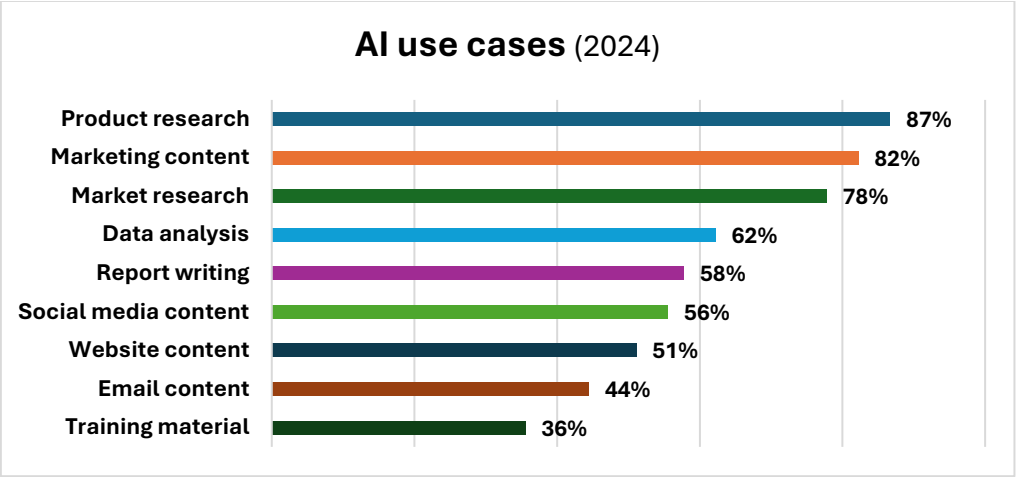
These shifts highlight how GenAI is driving a new hierarchy of importance among hardware providers, favouring those with AI-optimised architectures and integrated solutions capable of meeting the performance demands of large-scale GenAI models.

As the market continues to evolve, suppliers that invest in AI-specialised hardware, energy efficiency, and scalable infrastructure are likely to maintain or grow their influence – while those associated primarily with general-purpose or consumer-grade hardware may continue to lose prominence in this space.

Use of AI across business functions

The 2025 data on AI use cases among companies already using generative AI highlights a clear evolution in how businesses are applying the technology, with a shift toward content creation, business communications, and operational reporting. Compared to 2024, the results indicate a broadening of AI's role beyond insight generation, as organisations embed GenAI into more routine and functional areas of work.





Operational communication becomes the top AI use case

In a major shift from 2024, email content generation emerged as the most widely used application of GenAI in 2025, with 94% of GenAI-using companies reporting active use – more than doubling from 44% in 2024. This surge reflects the growing reliance on AI to support high-volume, personalised communications, especially in customer engagement, internal updates, and automated outreach campaigns. It also signals that email has moved from a peripheral use case to a critical touchpoint in how companies apply AI day-to-day.

Report writing similarly jumped from 58% in 2024 to 87% in 2025, making it the second most common AI use case. The sharp increase suggests that GenAI is now central to producing structured business documents – ranging from internal updates and stakeholder reports to

compliance documentation – highlighting the growing trust in AI's ability to handle formal outputs previously crafted by human authors.

Shift in content generation priorities

While marketing content and market research remain among the top AI use cases, their usage has declined. Marketing content use fell from 82% to 68%, and market research from 78% to 74%. These drops indicate that while these functions still benefit significantly from GenAI, they are no longer the primary focus. Businesses may now be applying AI more selectively within these areas, or reallocating resources toward more immediate and measurable content outputs such as emails and reports.

Stable performance in data and training functions

Data analysis, long a core application of AI, saw only a slight decline – from 62% to 59%. This stability suggests that while newer applications may be growing faster, AI's role in surfacing insights, identifying trends, and supporting decision-making remains fundamental to business operations.

Meanwhile, the use of GenAI for training material development increased from 36% in 2024 to 51% in 2025. This growth reflects rising demand for personalised learning tools and updated internal content as AI reshapes workflows. Organisations are using GenAI not just to train their employees in AI usage, but to power the training itself.

Declining focus on digital content creation

Content types such as website content and social media content have seen modest declines in use. Website content fell from 51% to 44%, and social media content from 56% to 41%. These drops may point to maturing expectations around GenAI's role in brand-facing communication, where tone, consistency, and governance are paramount. Rather than fully automating these areas, businesses appear to be shifting GenAI support toward internal or semi-structured content creation where quality controls are easier to enforce.

From creative support to core operations

The 2025 data reflects a deeper embedding of generative AI into business operations. While 2024 saw stronger emphasis on creative and strategic support – particularly in marketing and research – the 2025 data shows that GenAI is now being used primarily for communications and reporting functions that touch nearly every department.

This shift indicates that AI is no longer a tool for specialists or innovation teams but has become a foundational element of everyday business activity. As adoption deepens, the emphasis is increasingly on consistent, repeatable value from GenAI – supporting routine workflows, improving efficiency, and enabling teams to focus on higher-value tasks.

Conclusion

The South African Generative AI Roadmap 2025 survey presents a clear picture of GenAI moving firmly beyond the experimentation phase into more widespread adoption across organisations. With **67%** of respondents now reporting active use of GenAI – up from **45%** in 2024 – the findings reflect one of the most striking shifts year-on-year in the technology landscape. What was initially a space dominated by cautious exploration and future planning is now becoming embedded in daily business operations, particularly in areas like content generation, reporting, and market research.

From hype to action – but strategy still lags behind

Despite the strong growth in GenAI usage, the research shows that this acceleration continues to outpace the development of formal strategies, governance frameworks, and oversight mechanisms. Just **14%** of companies report having a company-wide GenAI strategy in place, with a further **22%** reporting strategies at the divisional level. While these numbers suggest incremental progress from last year, they also highlight that most organisations remain in an exploratory or reactive phase, where adoption is driven by individual teams or immediate needs rather than structured, organisation-wide plans.

This gap between deployment and strategic alignment reflects a core challenge that has persisted from 2024 into 2025. Many companies are moving quickly to leverage GenAI's capabilities, but fewer are investing the time and resources required to integrate these tools into business models in a way that is sustainable, compliant, and well-governed. The rise of Shadow AI – from **24%** in 2024 to **32%** in 2025 – illustrates how grassroots adoption continues to flourish in the absence of official policies, creating both innovation opportunities and significant governance risks.

A deepening divide between early adopters and those holding back

The report also highlights a growing polarisation in the market. On one side, a segment of organisations is actively deploying GenAI at scale: **20%** have already implemented solutions and a further **15%** are currently rolling out deployments. On the other side, **51%** of respondents still report having no current plans for GenAI implementation. This divide has remained largely unchanged from 2024, reinforcing the notion that while the adoption wave is gaining strength, it has not yet become universal across sectors.

Among those who are adopting GenAI, the range of deployment models remains varied but shows signs of steady maturation. Regular use of public GenAI services has risen from **13%** to **35%**, while dabbling with basic tools has declined from **53%** to **35%**. However, advanced deployments – such as hybrid cloud or on-premises integration – remain limited to a small minority. This suggests that while usage is growing, the leap from experimentation to deeply embedded, custom solutions is still a significant hurdle for many organisations.

High hopes, tempered by realism

A key finding across both the 2024 and 2025 reports is the sustained optimism about GenAI's potential to transform business performance. A combined **70%** of respondents expect significant or major improvements in growth, innovation, and operational efficiency. Productivity and competitiveness remain the strongest perceived areas of impact, with **83%** and **86%** of respondents respectively rating the impact in these domains as positive or very positive.

However, this optimism is tempered by growing realism about the challenges of implementation. Direct business outcomes such as profit, sales effectiveness, and turnover show far less consistent positive sentiment, with many respondents remaining neutral about GenAI's tangible financial benefits. These results suggest that while operational efficiencies are being realised, translating these into measurable financial returns remains a work in progress for many companies.

Governance, skills, and safeguards remain critical gaps

The findings highlight that governance structures are not keeping pace with adoption. **37%** of companies using GenAI report having no safeguards in place, while only **13%** have comprehensive guardrails that address safety, privacy, and bias. Monitoring for hallucinations (**7%**) and controls to prevent data leakage (**6%**) remain rare. These gaps raise concerns about the ability of organisations to manage risks effectively, particularly as adoption deepens across business units.

The low incidence of reported negative outcomes – such as security breaches (**1%**), privacy violations (**1%**), and reputational damage (**1%**) – should not be interpreted as a sign that governance can be deprioritised. The data consistently shows that when issues do arise, they are tied to unauthorised usage, reinforcing the need for organisations to actively manage Shadow AI risks through stronger policy enforcement, user education, and monitoring.

Skills development is another area where progress remains uneven. While upskilling of current employees is the most common approach (**53%**), **22%** of organisations report no specific measures in place to prepare their workforce for GenAI. The continued shortage of skilled talent was identified as a top-three barrier to adoption, alongside high costs and data privacy concerns. Without investment in skills and capability building, many companies risk limiting the effectiveness of their GenAI initiatives.

Environmental accountability: A growing blind spot

Sustainability remains a critical gap in GenAI planning. A striking **76%** of respondents report no specific measures in place to address the environmental impact of their GenAI use, despite rising global awareness of AI's energy consumption. Small minorities are taking steps to monitor energy use (**11%**), implement sustainable AI solutions (**10%**), or use carbon offset programmes (**5%**). As regulatory and stakeholder attention on environmental responsibility grows, this area could become an increasing point of vulnerability for companies with GenAI deployments.

A reshaped supplier landscape and evolving tool preferences

The 2025 data also captures important shifts in the GenAI supplier landscape. Nvidia's recognition jumped from **68%** in 2024 to **99%** in 2025, with Intel at **93%** and Dell at **92%**, establishing all three as leaders. Meanwhile, suppliers like HPE (**59%**), SuperMicro (**58%**) and Qualcomm (**56%**) have gained ground. These changes reflect a broader recognition of the need for AI-optimised infrastructure as adoption expands.

On the software side, **ChatGPT** remains the most widely used GenAI platform overall, with a combined **93%** usage across its paid (59%) and free (34%) tiers. **Microsoft Copilot** follows as the most adopted single-tier tool at **74%**, highlighting the appeal of embedded productivity integration. The tool landscape remains fragmented, with emerging players like DeepSeek (15%), Perplexity (9%), and Sora (6%) gaining visibility, while creative tools like DALL·E 2 (18%) and Midjourney (12%) continue to serve niche use cases.

Moving forward: From adoption to integration

The 2025 Roadmap confirms that the adoption of GenAI in South Africa is accelerating rapidly – but also that significant challenges remain in translating this adoption into structured, responsible, and effective integration. While usage is high, governance, strategy, and skills development continue to lag, leaving many organisations exposed to risk and limiting their ability to fully realise GenAI's potential.

Roadmap for responsible AI

To help businesses mature beyond initial use, we propose a six-pillar framework for GenAI readiness:

1. **Strategy**: Define and align AI with business objectives.
2. **Governance**: Establish ethical, legal, and security frameworks.
3. **Infrastructure**: Invest in scalable, secure, AI-ready environments.
4. **Skills**: Build internal capabilities and leadership.
5. **Environmental Responsibility**: Track and reduce AI-related emissions.
6. **Innovation**: Move from using GenAI tools to developing local models.

The next phase of the GenAI journey for many South African businesses will require not only broader deployment, but deeper alignment between technology use, business objectives, and operational governance. Companies that can close this gap – moving from informal usage to structured, risk-aware adoption – are likely to be the ones best positioned to harness GenAI's transformative capabilities in a sustainable and secure way.

Contact

The study was led by Arthur Goldstuck, managing director of World Wide Worx. He is author of 20 books, including *The Hitchhiker's Guide to AI*, and *Tech-Savvy Parenting*. As principal analyst, he leads World Wide Worx's groundbreaking research. He was assisted by Jason Bannier in data analysis for *The South African Generative AI Roadmap 2025*.

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