GLG

WHITEPAPER

Cloud Migration Business Impact:

A Cross-Industry Study of AWS Customer Value Realization

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EXECUTIVE SUMMARY

As organizations migrate IT resources to the cloud, they experience significant improvements in their ability to deliver results for their customers, bring new products and services to market, and reduce business risks associated with security incidents and downtime. To understand more about the business value obtained from migration to the cloud, GLG surveyed 400 IT and business decision makers in four geographic regions and seven major industry segments who had migrated to Amazon Web Services (AWS). Organizations migrating to AWS realize significant improvements in both IT operations and industry-specific outcomes, spanning cost savings, staff productivity, operational resilience, and business agility. Greater improvements are seen as organizations move more resources to the cloud and make greater use of cloud spend optimization tools. By leveraging the ability to scale IT capacity over time and on demand, organizations that migrate to the cloud can achieve greater IT productivity, deploy new products and services faster, and share data across functional areas more efficiently. IT and business leaders surveyed project continued growth in cloud adoption over the next three years. By migrating to cloud, organizations establish an essential foundation for artificial intelligence (AI) adoption, improving customer experience and streamlining business processes today, while putting in place capacity to quickly deploy and scale AI capabilities as these technologies mature.

Business Outcomes from Cloud Migration

24% reduction in IT spend as a percent of revenue

47% fewer unplanned outages

22% improvement in infrastructure SLA performance

ABOUT THE RESEARCH

GLG, the World Insight Network, brings decision makers the insight it takes to get ahead, providing meaningful connections through a network of 1 million experts, the world's largest and most varied source of first-hand expertise. In February 2025, AWS engaged GLG to conduct a survey of 400 IT and business leaders who had migrated at least 25% of their IT footprint to AWS, leveraging GLG's network to provide independent perspectives on the business value obtained from that migration. GLG conducted the study in a double-masked manner to ensure objectivity. Survey respondents in this study had decision-making authority over the selection of cloud infrastructure services and their organizations had been using AWS services for at least two years. Respondents were asked to compare their business metrics before and after their migration to the cloud. To assist in interpretation of the survey findings, GLG conducted 20 in-depth, qualitative interviews (IDIs) with business and IT leaders possessing similar profiles to our survey respondents.

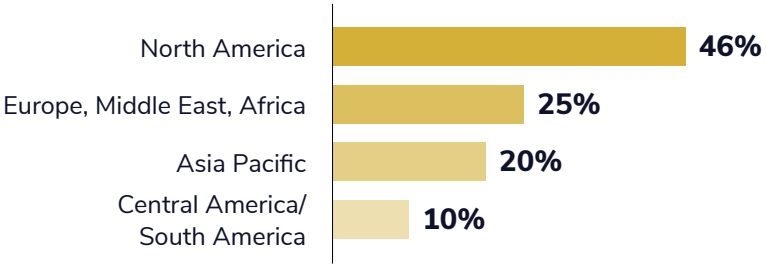
GLG conducted this research to understand the business value realized by migration of key IT capabilities to the cloud. The key goals were to:

- Identify the areas of business performance impacted by migration to AWS
- Quantify the improvement to key performance indicators (KPIs)
- Illuminate the means by which adoption of cloud services improves KPIs
- Understand challenges and opportunities presented during the migration process

The figures below indicate respondents' job function, their companies' annual revenue, company size, and segmentation of respondents' companies across industries.

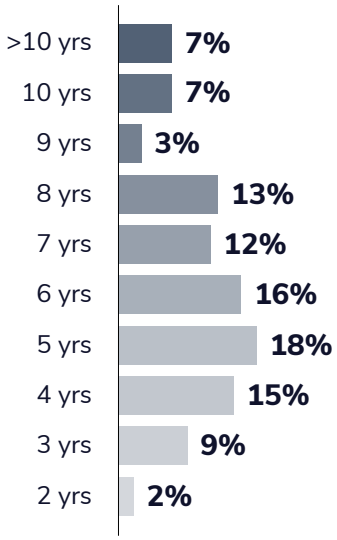
Region

N = 400



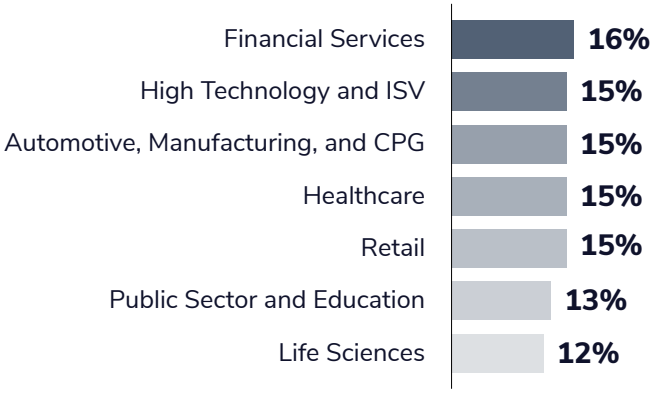
Time Hosting on Cloud

N = 400



Industry Segment

N = 400



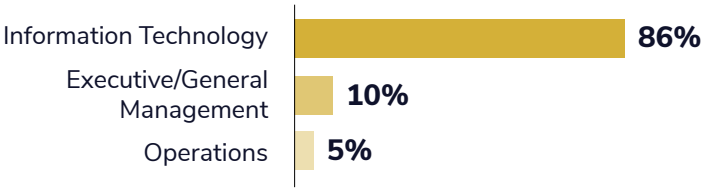
IT Spend

N = 400



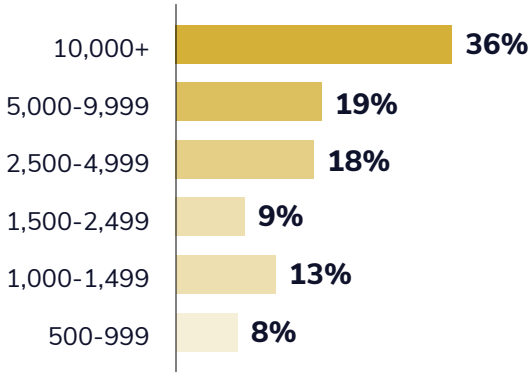
Job Function

N = 400



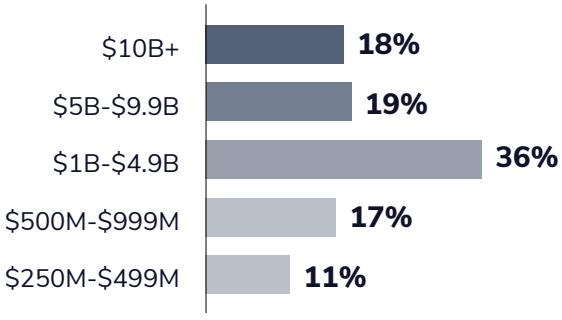
Number of Employees (FTEs)

N = 400



Annual Revenue

N = 400



CLOUD MIGRATION GOALS

IT cost reduction is an important goal for organizations, but it was not the only driver of migration reported in the survey. While 59% of respondents identified cost reduction as a key reason they moved to the cloud, 51% of respondents, including many of the same respondents seeking cost improvements, also emphasized the importance of achieving greater business agility through cloud migration, either by simplifying existing business processes, by investing in digital innovation in support of anticipated business needs, or both.

51%

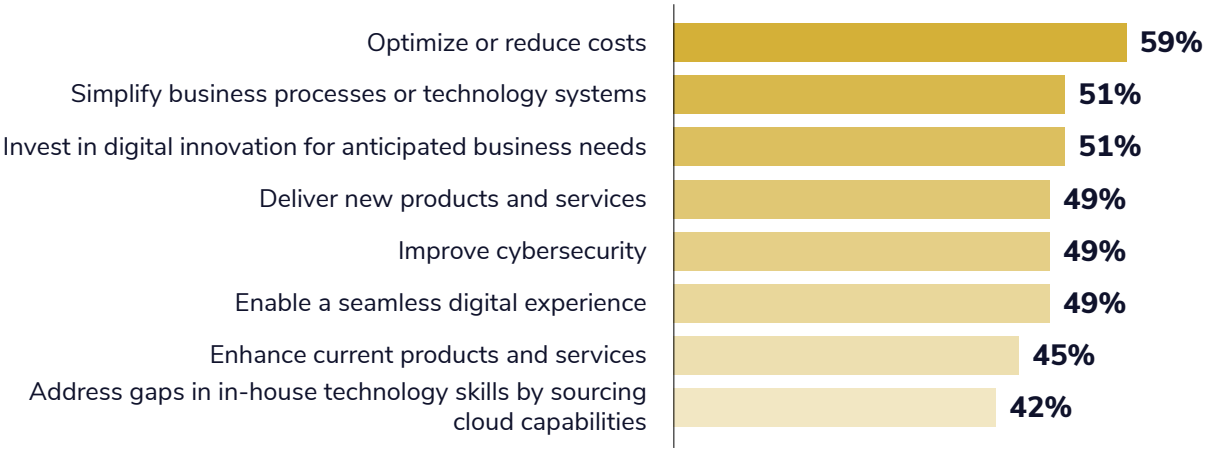
of respondents migrated to the cloud to enable innovation in support of future business needs

Companies in different industries pursued the business agility benefits of the cloud for different reasons, reflecting their varying business goals and customer expectations. 67% of respondents from life sciences companies identified the goal of delivering new products and services as a key driver of cloud migration, while 78% of public sector organizations moved to the cloud to improve cybersecurity. 62% of respondents from high-tech companies and ISVs saw cloud migration as a path to enabling a seamless digital experience for their customers. For these companies, cloud migration was more than just a path to reduce IT costs: it enabled innovation, helped to mitigate risk, and created opportunities for revenue growth.

When asked about the importance of business agility to the decision to migrate to the cloud, the CIO of a global industrial manufacturing firm explained, "This [cloud] way of working does two things. First, it reduces the number of IT personnel you need to govern existing services or products. Second, it massively accelerates the time to market for new features, new functions, new services, because you have people from IT and the business sitting together and exploring what kinds of capabilities they want to produce in the next iteration or the next six-week sprint. And the beauty of cloud services is that in most cases, 80% of the value of the new service or feature is available at your fingertips. You can easily do a rapid prototype or an MVP with a new feature out of the cloud stack, pilot it in one business unit, and after six weeks identify whether you want to roll it out to the organization or not. This was simply not possible in the past. A cloud-migrated platform gives you return on your costs because you are fast, you're more flexible, and, most important, you are bringing value as fast as possible to your customers or internal stakeholders."

Primary Reasons for Cloud Migration

N = 400



PRIORITIES FOR MIGRATION

Most organizations surveyed had moved the majority of their IT infrastructure to the cloud, with respondents indicating that an average of 52% of their IT stack was already on the cloud. The level of cloud deployment was expected to increase, with respondents expecting an average of 68% of their IT infrastructure to be in the cloud within three years.

IT Infrastructure (Public Cloud)

Mean %



When asked to detail which specific applications had been migrated to cloud first, 47% of respondents indicated that they started their migration with core workloads such as IT and security infrastructure and major horizontal business application suites, including customer relationship management (CRM) and enterprise resource planning (ERP) systems. Analytic workloads were the next most likely to have been migrated, with 28% of respondents beginning their cloud journey with these workloads.

The reliability and performance required for core revenue-generating workloads means that those are usually the first workloads moved to the cloud. The CTO of a large apparel retailer gave an example: “The first workload that we migrated to the cloud was our e-commerce platform, which was a big commitment because e-commerce is responsible for about 50% of our revenue. The primary reason that we did that was because the previous three years, at our peak season, which is the holidays, our website had fallen over. So there was lots of urgency about getting e-commerce moved to the cloud, to get our primary workloads onto the cloud first and foremost.”

Among the least likely workloads to have been migrated were engineering and design systems. Many of these systems are difficult to migrate due to either extreme sensitivity around the disclosure of their data and functionality or high degrees of customization. When presented with the opportunity, however, 60% of respondents indicated that they would deviate from their existing migration strategy if there was an opportunity to migrate a specific workload ahead of schedule, such as a special budget allocation or pressure due to an end-of-life announcement.

64%

of respondents had already migrated their core IT and security infrastructure to the cloud

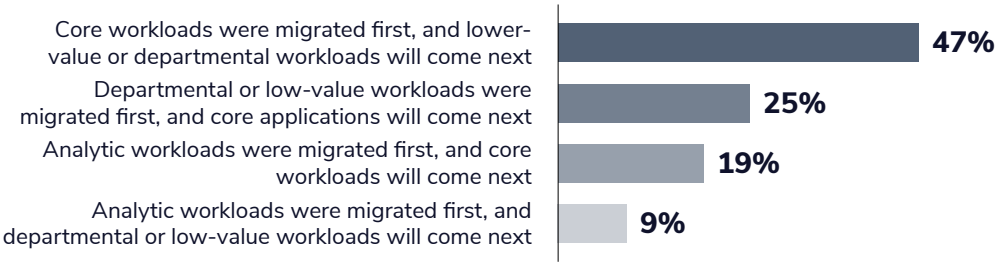
Workloads That Run on the Cloud

N = 396



Cloud Migration Patterns

N = 400



Deviation from Planned Migration Path to Add Opportunistic Workload

N = 400



Across industries, analytics was the most commonly identified “gateway” workload, meaning that migrating these workloads often acted as a trigger or impetus to additional migration efforts. Moving analytics workloads to the cloud can have immediate, transformative effects, as business units are able to obtain insights more rapidly and in a more timely manner. Impacts from migration of these workloads are also visible across the company, which may not be the case for business applications used by only specific groups of professionals

such as HR management systems or procurement tools. Though these gateway workloads typically represent less than 20% of an organization's IT spend, migrating them can stimulate rapid shifts of other parts of infrastructure and make it easier to build business cases for future modernization efforts.

Gateway Workloads to Migrate for Line of Business

N = 400



COST IMPROVEMENTS AND SPEND REALLOCATION

15%

reduction in IT infrastructure spend as % revenue after migration

When organizations migrate to cloud, they are able to reduce their overall spend on IT resources, as well as to redirect existing spend from operating the infrastructure to delivering new applications and services. Committing fully to cloud migration was observed to have a large impact on the level of cost improvement achieved. After migrating to cloud, respondents overall saw a 24% reduction in IT spend as a percent of revenue and a 15% reduction in IT infrastructure spend as a percent of revenue. Those migrating 50% or more to the cloud see the greatest improvements, with 38% lower IT spend and infrastructure spend as a percentage of revenue. For many organizations, this is likely because a partial migration still leaves substantial on-premises or co-located resources in place that must be maintained, while also adding responsibility to manage new cloud capabilities. As organizations shift more of their infrastructure to the cloud, efficiencies begin to compound and the full benefits of adopting the cloud model become apparent.

Change in IT and Infrastructure Spend Due to Cloud Migration

	Mean IT Spend	Mean Infrastructure Spend
Total	-24%	-15%

IT Spend total base size = 388; Infrastructure Spend total base size = 366

When asked how organizations realize cost benefits from migrating to the cloud, the head of cloud and infrastructure at a major pharmaceutical company explained, "The cloud allows you to tailor the supporting infrastructure and services around the demands of the workload. It flexes and bends to whatever output is required. You couldn't possibly do this with on-premises infrastructure. You spec an on-prem server or data center to the worst-case scenario: let's say we're supporting an ERP system, and at the end of every month when the books close, traffic spikes, that's what we spec. But three weeks and four days of the month, it's largely idle and it's just sitting there, and that's just a tremendous waste. Whereas in the cloud, you can put on auto-scaling capabilities and it'll go ahead and scale up to what's needed, and then when it's not needed

anymore, it'll scale down. And the human never even gets in the loop. The system does it automatically. All of the automation makes sure that you're only utilizing the capacity that you absolutely need. No more, no less."

The CIO of a regional bank emphasized that the cost benefits of cloud migration are frequently realized in the form of averted future costs. "Once you move your workloads to the cloud, assuming nothing changes, you are largely in a steady state in terms of cost, but there are two factors to consider. One is the ongoing innovation that's happening in the cloud. As a provider introduces more capabilities for us to develop software faster or have more access to AI, you are getting increased value, but it's not going to necessarily save costs. The same thing is true with scalability. As we grow as an organization, we didn't have to spend $250,000 on servers this year; we simply increased our workload capacity on the cloud, and that only cost us $100,000."

INCREASED IT STAFF PRODUCTIVITY

7%

reduction in IT staff assigned to manage day-to-day operations after migration

After migrating to the cloud, respondents found that IT staff were able to administer more IT resources per capita, with an average IT admin able to manage 139% more virtual machines and 160% more storage. For organizations that had migrated more than 75% of their infrastructure to AWS, the impact was even more significant: organizations at this highest tier of adoption were able to manage an average of 1,031 TB of storage per storage admin, compared with 382 TB per storage admin across the survey population as a whole. Similarly, organizations that had migrated more than 75% of their infrastructure to AWS saw a 282% increase in the number of VMs managed per admin, compared with 139% for the survey population as a whole. Respondents also saw an overall reduction of 7% in the number of IT staff assigned to manage day-to-day operations after migration, meaning that a significant portion of IT resources were made available to develop new capabilities or handle more complex IT tasks.

IT Infrastructure (Admin)

Mean value

	VMs per Admin	TBs per Admin	Infrastructure Staff on Day-to-Day Ops
% Change after Migration	139%	160%	-7%

Base size of VMs per Admin = 350; TBs per Admin = 336; Infrastructure Staff on Day-to-Day Ops = 391

A state government CTO explained how cloud migration changed the nature of the work performed by existing IT staff: "It goes from needing a person on-site to cover a specific data center to that person being able to cover a whole region. One of the things that used to be an issue for us was whether there was a server down in a particular office. I used to have a person or two at each site. Moving to the cloud, that changed to having one person monitor all of the offices. As far as security, it's the same thing: today you might have a security team of 20 or so people that are involved in responding to threat actors. That drops down to five because there are a lot of automated tools within the cloud environment that can do all that for you. Their role becomes about monitoring and reacting to threats that are detected. They're not doing everything that they would do in the past."

The CTO of an international bank also described how after migrating to the cloud, organizations can find that they need to staff entirely new roles in their IT organizations: "Migrating to the cloud means that your internal organization will shift in shape and form. It requires reskilling and upskilling of a large number of resources. When you have moved all your workloads to the cloud, people in your IT organization will need to have different roles. You will need roles like vendor manager, like a performance manager who looks at your SLAs and your contracts with the cloud provider. You need people who can translate requirements from the business into requirements for the cloud provider. So there is both upskilling in existing roles, but also potentially new recruitment or new types of competencies added for the retained IT organization."

IMPROVED RESILIENCE

Respondents saw improved business resilience after migrating to the cloud in the form of both reduced downtime and increased security. Organizations saw a 38% reduction in critical incidents after migrating to cloud, 47% fewer unplanned outages, and a 51% reduction in unplanned downtime, with respondents experiencing an average of 32 hours less downtime across each year. Overall this meant that organizations were able to meet infrastructure SLAs 22% more often than before they had migrated to the cloud. Respondents also saw a 41% decrease in the number of security incidents and a 49% reduction in mean time to detect (MTTD) security incidents.

51%

reduction in unplanned downtime after migration

IT Infrastructure (Outages & Downtime)

Mean value

	Percent of Infrastructure SLAs Consistently Met	Number of Outages	Unplanned Downtime
% Change after Migration	22%	-47%	-51%

Base size of Percent of Infrastructure SLAs = 383; Number of Outages = 372; Unplanned Downtime = 364

IT Infrastructure (Security)

Mean value

	Number of Security-Related Incidents	MTTD for Cybersecurity Incidents	Number of Critical Incidents
% Change after Migration	-41%	-49%	-38%

Base size of Number of Security-Related Incidents = 341; MTTD for Cybersecurity Incidents = 351; Number of Critical Incidents = 369

A solution architect at a regional healthcare facility articulated their confidence in cloud security. "It's a fallacy to think that your own data center is more secure than the cloud. There are multiple levels of security. You have physical security, I mean, you look at the huge data centers that the cloud providers erect to host all that hardware, and they're guarded physically by security guards better than the data center that I go to every day at my organization. In terms of the vulnerabilities that are in the operating systems, those providers are much quicker to respond to those security gaps than you can ever be. So I'm completely convinced that my data

is much more secure on the cloud. From physical security, to network security, to vulnerability mitigation, to thwarting hackers, the cloud providers are much better suited and much more prepared to deal with security threats than any individual company on the commercial side."

A state government CIO also described their cloud environment as significantly more reliable than their previous on-premises data center: "There were a lot of unplanned outages in the infrastructure that was on-premises. It was very easy to demonstrate that when something controlled on-premises by the state went down, other parts that were in the cloud were not affected. We tracked that over time, so you have real statistics to support that cloud infrastructure is more stable. We had key risk metrics that represented our tolerance level for certain things before we felt like we had an obligation to report them up to the governor's office. Availability was one of them, and it was easy to demonstrate over time that the cloud infrastructure was so much more reliable and stable."

INDUSTRY-SPECIFIC OUTCOMES

While all organizations share a common set of core IT operational metrics, every industry has unique KPIs that measure its most important business activities. In the study, respondents were asked to indicate how these key metrics had improved as a result of migrating industry-specific workloads to the cloud. In retail, for example, respondents indicated a 73% average increase in e-commerce conversion rates and a 7% decrease in stock-out situations. High-tech ISVs were able to support 40% more monthly active customers for the same cost. Financial services companies saw an increase in online self-service success rates of 84%, while manufacturing companies saw a 4% decrease in design testing cycle time. Healthcare companies saw a 36% decrease in the time required to file and process claims, and life sciences firms saw a 14% decrease in the number of days taken to identify a promising new drug candidate. The charts below provide a more detailed picture of improvements observed across industries.

Change in Retail Metrics

Mean value

	Shopping Cart Abandonment Rate	E-commerce Conversion Rates	Stock Out	Increase Basket Size
% Change after Migration	-3%	73%	-7%	42%

Base size of Shopping Cart Abandonment Rate = 44; E-commerce Conversion Rates = 48; Stock Out = 41; Increase Basket Size = 40

Change in High-Technology & ISV Metrics

Mean value

	Daily Active Customers	Monthly Active Customers
% Change after Migration	30%	40%

Base size of Daily Active Customers = 43; Monthly Active Customers = 44

Change in Financial Services Metrics

Mean value

	Software Licensing Costs	Online Self-Service Success Rate	Average Time to Migrate Application
% Change after Migration	-6%	78%	-4%

Base size: Among companies hosting 51% or more of their workloads on AWS. Base size of Software Licensing Costs = 23; Online Self-Service Success = 23; Average Time to Migrate Application = 23

Change in Manufacturing Metrics

Mean value

	OEE	On Time in Full (OTIF)	Design Testing Cycle Time	Unplanned Downtime	Time to Resolution
% Change after Migration	4%	11%	-4%	-24%	-6%

Base size of OEE = 47; OTIF = 46; Design Testing Cycle Time = 51; Unplanned Downtime = 52; Time to Resolution = 51

Change in Healthcare Metrics

Mean value

	Cost per Patient Service	Time to Enter/ Process Patient Records	Time to File/ Process Claims	Time to Market for New Digital Products/Services	Time to Integrate New Systems	Patients Adopting Telehealth
% Change after Migration	-4%	-29%	-36%	-26%	-30%	61%

Base size of Cost per Patient Service = 29; Time to Enter/Process Patient Records = 33; Time to File/Process Claims = 29; Time to Market for New Digital Products/Services = 34; Time to Integrate New Systems = 40; Patients Adopting Telehealth = 33

Change in Life Sciences Metrics

Mean value

	Time to Drug Candidate Identification	Research Operation Spend as % of R&D Spend	Clinical Trial Setup Time	Cost per Patient Recruited for Clinical Trial	Manufacturing Cycle Time	Time to Process Data and Generate Insight
% Change after Migration	-14%	-2%	-17%	-10%	-17%	-27%

Base size of Time to Drug Candidate Identification = 34; Research Operation Spend as % of R&D Spend = 37; Clinical Trial Setup Time = 41; Cost per Patient Recruited for Clinical Trial = 32; Manufacturing Cycle Time = 38; Time to Process Data and Generate Insight = 42

Change in Public Sector Metrics

Mean value

	First-to-Second Year Retention Rate	Endowment Growth	Expenses	Number of Publications in Peer-Reviewed Journals	Grant Success Rate	Institutional Support	% Revenue Impact through Advanced Analytics	Data Security Cost
% Change after Migration	28%	74%	-12%	49%	52%	19%	58%	-7%

Base size of First-to-Second Year Retention Rate = 41; Endowment Growth = 25; Expenses = 41; Number of Publications in Peer-Reviewed Journals = 14; Grant Success Rate = 31; Institutional Support = 35; % Revenue Impact through Advanced Analytics = 38; Data Security Cost % Change = 45

The opportunities presented by cloud migration can create significant business and operational transformations in certain industries. The CIO of a public health institution provided an example of the impact cloud has had in healthcare: "There has been material transformation in the way in which healthcare is being delivered as a result of advances in cloud technology, whether it be in cancer treatment, emergency medicine, maternity services, et cetera. These advances in technology have necessitated significant transformation in the skills that our clinicians have to bring to the workplace in their understanding and usage of technology to support them in managing their patient care. In the field of medicine, we've seen significant advances in technology in the design and manufacture of new drugs, diagnostics, and robotics. These technology advances are changing in a material way how healthcare is being operated and delivered by clinicians to their patients."

GENERATIVE AI

26%

return on investment (ROI) achieved from GenAI projects

Data migration, a key element of cloud migration, is a significant enabler of generative AI adoption and value realization. As the CTO of a global bank explained: "A lot of financial institutions have legacy processes that involve documents. When you start automating these processes, you can obtain return on investment from head count reductions or efficiency gains the moment your AI service is put into production. But a lot of these companies don't have the fundamentals in place to implement generative AI automations. If you believe that you can realize the value of a generative AI implementation in two or three months without already having invested in your data infrastructure and migrated it to the cloud, then you're going to go wrong. The value from your generative AI investment will not materialize because you don't have your data in the cloud."

As organizations begin to invest in generative AI technologies, IT leaders are reallocating budgets to meet growing business demand: respondents indicated that an average of 26% of IT costs allocated to new projects are expected to go toward generative AI next year. Overall, IT budgets for generative AI have increased by 46%.

Though generative AI is still early in its adoption curve, organizations that have introduced this technology are already seeing results. Respondents indicated that their organizations have seen an average of 15% increase in revenue associated with generative AI investments and an overall return on investment from generative AI projects of 26%. Generative AI is also helping make organizations more efficient, with respondents indicating that using generative AI as part of new product or service projects accelerated time to value by 29%.

Generative AI Adoption Outcomes

Percentage of ROI Actualized	Percent of Revenue Increase from GenAI	Percent Time Reduction due to GenAI Implementation	GenAI Budget Growth
26%	15%	29%	46%

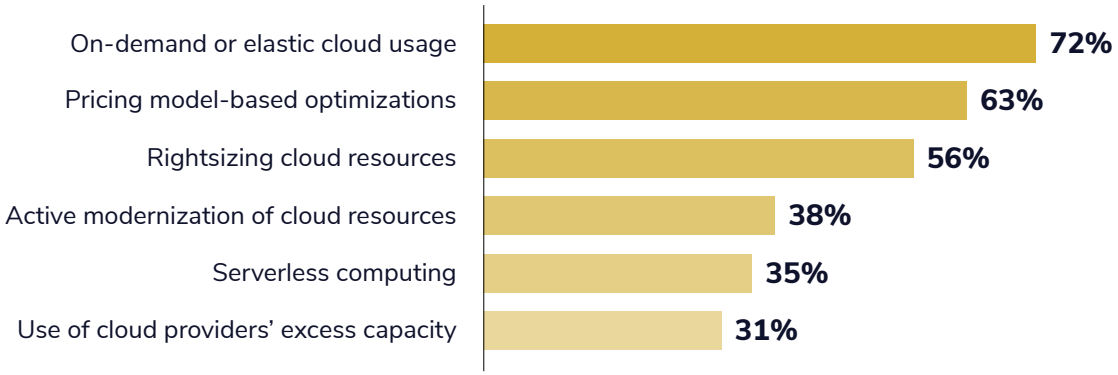
Base size of Percentage of ROI Actualized = 400; Base size of Percent of Revenue Increase from GenAI = 400; Base size of Percent Time Reduction due to GenAI Implementation = 400; Base size of GenAI Budget Growth = 383

CLOUD FINANCIAL MANAGEMENT

AWS offers a wide range of cloud spend optimization features, including workload scheduling, dynamic resource allocation, autoscaling, reserved instances, committed use discounts, spot instances, storage tiering, and serverless architectures. Organizations frequently reported utilizing these features to manage cloud costs. 72% of respondents made use of on-demand or elastic cloud infrastructure, 63% took advantage of pricing-model-based optimizations such as consumption tiers or commitment-based pricing, and 56% indicated an active strategy to "right size" cloud resources based on business requirements. 46% of respondents leverage commitment-based pricing and 23% use cloud provider excess capacity. Organizations that adopt cloud cost optimization strategies achieve an average 24% incremental savings.

Tools and Strategies Used to Optimize Cloud Spend

N = 400



Spend on Cloud-Hosted Infrastructure/Platforms across Pricing Models

N = 400



Cloud Spend Breakdown

Mean %

	Forecast Accuracy	Charge-Back Rate	Incremental Savings from Cost Optimization
Mean %	67%	51%	24%

Base size of Forecast Accuracy = 372; Charge-Back Rate = 370; Incremental Savings from Cost Optimization = 372

The survey examined customer adoption of six AWS tools for optimizing cloud spend: on-demand or elastic cloud usage, pricing-model-based optimizations, rightsizing of cloud resources, active modernization of cloud resources, serverless computing, and use of excess capacity. Organizations that indicated use of five or more of these tools achieved the highest overall incremental cost savings, 134% greater than savings achieved by

peers that are not utilizing any of the six studied cloud spend optimization tools. In addition, organizations that utilized recommended approaches to cloud spend forecasting, resource tagging, and cloud financial management were seen to achieve greater savings than organizations that did not utilize these approaches:

- Organizations that utilized forecasting approaches that integrated known cost drivers, historical cloud spend, and input from teams building on AWS spent an average of 8% less on IT infrastructure as a percent of revenue.
- Increased use of tagging strategies to identify and track cloud expense was associated with a 6% increase in incremental cost savings from cost optimization measures.
- Organizations reporting organization-wide usage of an integrated financial management approach across cloud and on-premises IT reported an average 9% lower overall IT costs.

Organizations that put in place centralized and enforced governance over cloud expenditures saw 7% lower IT spend as a percent of revenue compared with peers with decentralized approaches or limited enforcement. Some organizations were able to compound the benefits of financial governance with robust cloud IT governance strategies to enable greater resilience and business agility.

The technology director for a global retailer provided an example of how a mature company operates its cloud spend optimization environment: "What we try to do is adhere to tiered pricing structures. We know what we're paying for, we can give very good estimates on how much data we're exchanging in and out of the platform, how much space we need, how many virtual machines we're going to be running. Then we use third-party tools to help make sure that we're not running too many virtual machines, that we're compressing data as much as we can so that we don't need so much space in those respective environments. For my cloud teams, it's part of their 24/7 job to look at those usage stats and make sure that business teams are keeping an eye on the costs."

CONCLUSION

GLG's research demonstrated that companies that migrate to AWS benefit from improvements to business agility and operational resilience, enabling them to bring products to market more quickly and deliver value to customers at greater scale and with higher reliability. Across industries, organizations that migrated to the cloud saw improvements in the KPIs most essential to their operations. The benefits of adopting AWS services were seen to compound, with greater benefits accruing to organizations that moved more resources to the cloud. By migrating to the cloud, organizations are able to avoid investing up-front in hardware and facilities to accommodate peak demand and can instead dynamically size capacity over time through incremental investment in cloud services. As organizations reduce costs and take advantage of cloud spend optimization practices, they can leverage greater IT productivity to rapidly deploy new capabilities and leverage data across silos, supporting industry-specific business objectives such as improving customer service, improving the pace of core business processes, and generating new insights that open new pathways for growth. The highest levels of adoption of cloud optimization features were correlated with the largest efficiency gains. Migrating to the cloud also creates an agile foundation on which to build new generative AI capabilities, allowing organizations to move quickly to capitalize on valuable market opportunities and experiment with emerging technology.



The survey and interview research and analysis contained in this document has been conducted by a consultant engaged by AWS through Gerson Lehrman Group's network of independent consultants and subject-matter experts ("Network Members"). Network Member survey respondents and interviewees were compensated for their participation in the research. All information is as of February/March 2025, is for informational purposes, and does not constitute legal, accounting, tax, investment or other professional advice. No representations or warranties (express or implied) are made regarding this document. Neither GLG nor any Network Member shall have any liability whatsoever in connection with the use of this document.