AWS Study: Generative AI Adoption Index

Insights on organizations in the US

This report illustrates the emerging characteristics of the generative AI wave and provides critical insights on what business leaders and policymakers must focus on in order to best harness it. Findings show that organizations will be prioritizing spending on generative AI tools as compared to security in their 2025 IT budgets. Alongside this, a new class of C-suite leaders – Chief AI Officers (CAIOs) – will lead the generative AI transformation. While organizations are adopting and experimenting actively with generative AI, the shortage of skilled talent poses challenges in moving these experiments to production. To address this, organizations are focusing on training existing employees and hiring new talent. Out-of-the-box AI models are anticipated to be highly valued, with the partnership between third-party vendors and in-house teams being critical in their successful deployment.

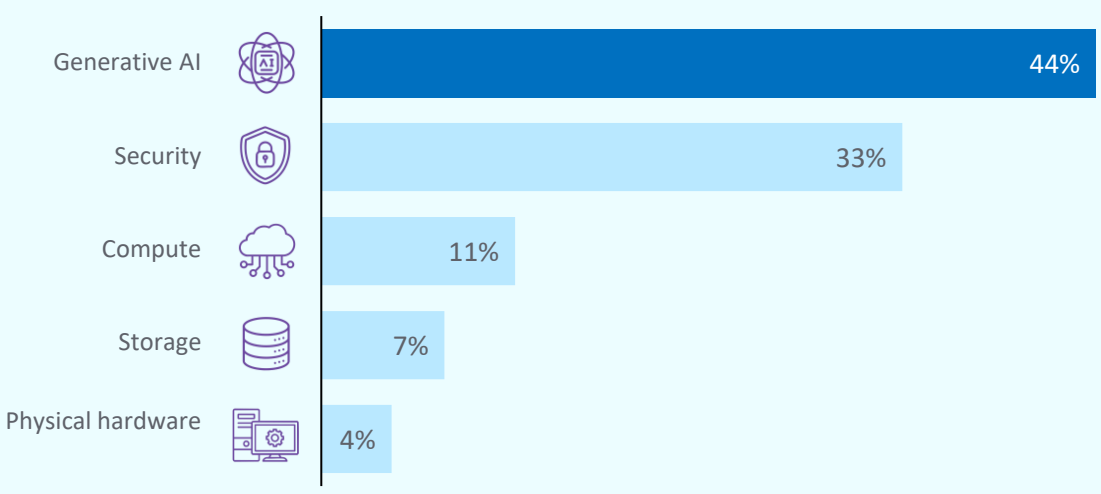
These findings were from a survey conducted by Access Partnership in collaboration with Amazon Web Services (AWS). IT decision makers involved in technology investment, and implementation at more than 3,739 organizations across nine countries – the United States of America (US), Brazil, Canada, France, Germany, Japan, India, South Korea, and the United Kingdom (UK) were surveyed. In the US, 409 IT decision makers were surveyed.

1 Organizations prioritize generative AI over security spending in 2025

Generative AI tools top budget priorities for organizations in the US in 2025. 44% of IT decision-makers surveyed ranked generative AI tools as their top budget priority for 2025, surpassing security solutions (33%) (Exhibit 1). This represents the shifting priorities of organizations that are eager to draw the benefits of AI-driven innovation. In evaluating generative AI tools or solutions for adoption, ease of integration into workflows is the most important factor for firms that face lower levels of oversight (68%) while those facing higher levels of oversight value advanced capabilities the most (63%). Interestingly, a significantly higher proportion of firms that face a high level of oversight (52%) – for example, those in the financial services sector – value privacy and security as compared to those who face lower levels of oversight (39%). Strong security features are emphasized to comply with stringent safety and regulatory requirements in highly regulated sectors.

EXHIBIT 1 Organizations prioritize spending on generative AI over security

Top priority for IT spending in 2025, Percentage of respondents, %



Source: Access Partnership's survey of 409 IT decision makers in the US.

2 The rise of the Chief AI Officer (CAIO)

Generative AI is creating a new class of C-suites who will drive change in businesses. As generative AI becomes embedded in the workplace, organizations are introducing new C-suite roles focused on AI strategy to remain competitive and address the rising need for AI leadership. 6 in 10 organizations have already appointed a Chief AI Officer (CAIO) to lead generative AI deployment, and an additional 26% intend to appoint one in 2026 (Exhibit 2). While 85% of organizations do not have a change management strategy to help employees navigate a future shaped by generative AI today, that number is expected to drop to 21% by the end of 2026. This underscores the increasing acknowledgment of AI as a transformative technology that demands strategic oversight at the highest levels and structured change management.

EXHIBIT 2 6 in 10 organizations have already appointed a CAIO

AI leadership plans, Percentage of respondents, %

Source: Access Partnership's survey of 409 IT decision makers in the United States.

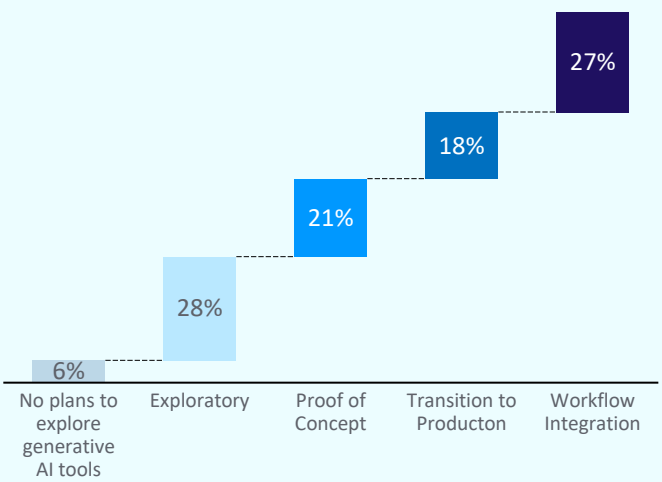
3 From experimentation to full integration – organizations are charging ahead

Around half (45%) of organizations in the US are transiting to production or have fully integrated generative AI into their workflows today. Organizations in the US have been quick to adopt generative AI with 94% using generative AI tools, and 89% running generative AI experiments. Only 6% of organizations have no plans to explore generative AI tools. Out of the 48 generative AI experiments conducted by organizations on average in 2024 to test and refine generative AI solutions, only 20 experiments on average are expected to move to production in 2025 (Exhibit 3). One of the key challenges hindering progress is the shortage of workers with generative AI skills.

EXHIBIT 3 While organizations are adopting and experimenting with generative AI, talent is a constraint

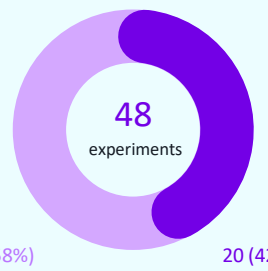
Generative AI adoption and experimentation

Stage of generative AI adoption
Percentage of respondents, %



Generative AI experiments in 2024
Number of experiments conducted by organizations experimenting with generative AI

48 experiments conducted on average in 2024, only **20** expected to move to production in 2025[1]



28 (58%)
Not moving to production in 2025

20 (42%)
Moving to production in 2025

1. Number of experiments conducted were calculated based on the weighted average of the number of organizations that indicated the different bands of number of experiments ran, and the mid-point of each band. Number of experiments that are expected to move to production were calculated using this figure, and the weighted average of the number of organizations that indicated the different bands of the percentage of experiments that make it to production, and the mid-point of each band.

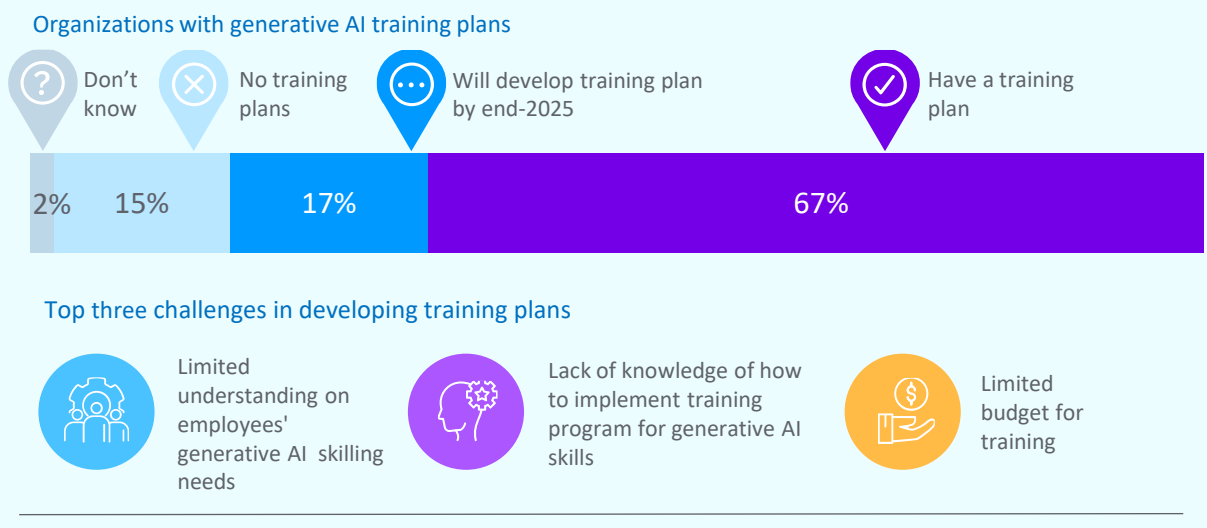
Source: Access Partnership's survey of 409 IT decision makers in the United States.

4 Bridging the generative AI talent gap – upskilling and hiring in 2025

To bridge the gap between experimentation and full-fledged deployment, organizations want to train and hire generative AI talent. Today, 67% of organizations in the US have developed generative AI training plans. A further 17% will develop one by the end of 2025 (Exhibit 4). However, some challenges are expected. The biggest challenges cited by IT decision makers in the development of training plans are a limited understanding of employees' generative AI skilling needs, a lack of knowledge of how to implement training programs, and budget constraints. Given these challenges, training alone is unlikely to fully meet skill demands, and organizations will be recruiting generative AI-skilled talent in 2025. 91% of organizations in the US expect to hire for roles that require generative AI skills in 2025.

EXHIBIT 4 Organizations are planning to train generative AI talent, but face challenges

Generative AI training, Percentage of respondents, %



Source: Access Partnership's survey of 409 IT decision makers in the United States.

5 Build vs Buy – organizations take a blended approach

Types of generative AI

Organizations may deploy a range of generative AI solutions:

In-house solutions involve training a generative AI model from scratch using data produced or acquired by the organization.

Out-of-the-box applications involve using existing applications as is for the organization's uses.

Custom applications built on out-of-the-box model involve simply adding a 'wrapper' or a user interface on top of pre-existing models without having to update the model's weights via additional training.

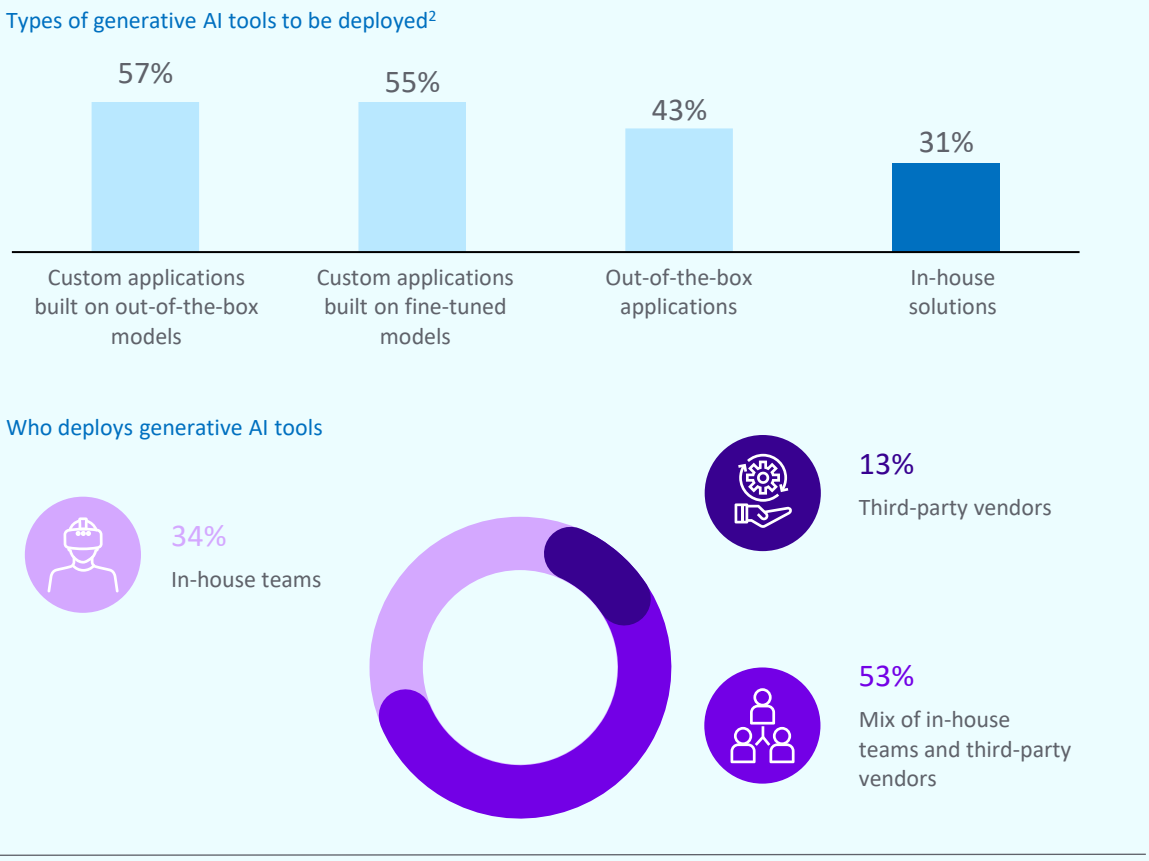
Custom applications built on fine-tuned models involve training pre-existing generative AI models on new data to adjust the weights of the model.

Most organizations will depend on pre-existing models but the desire for customization is evident. Most firms will build and deploy custom applications with organizations predominantly planning to leverage out-of-the-box models (57%) followed by fine-tuned models (55%) (Exhibit 5). This reflects a growing preference for models that can be tailored to meet specific business needs while still leveraging the efficiency of pre-built solutions.

Strong partnership between external vendors and in-house teams is key to accelerating generative AI deployment. 13% of organizations deploying generative tools in 2025 intend to solely rely on external vendor teams for deployment, while 53% plan to rely on a mix of in-house teams and third-party vendors (Exhibit 5). This underscores the growing emphasis on building internal capabilities alongside strengthening external partnerships. By leveraging both external and internal resources, organizations can achieve a balance between speed and flexibility of deployment as well as strategic alignment with their broader objectives.

EXHIBIT 5 Partnerships between third-party vendors and in-house teams will be critical

Deployment of generative AI tools in 2025, Percentage of respondents, %[1]



1. Excludes respondents who were not sure or were not planning to deploy generative AI tools.
2. Respondents were asked to select all options that apply.

Source: Access Partnership's survey of 409 IT decision makers in the United States.

Conclusion

Generative AI is poised to redefine the competitive landscape for organizations in the US, with the emergence of CAIOs signaling a shift toward dedicated leadership in AI transformation. While enthusiasm for generative AI is high, addressing the talent gap will be critical for full-scale implementation. Organizations are seeking to bridge the gap through training and hiring as well as investing in generative AI tools. For organizations in the US, it will be critical to build internal capabilities alongside strengthening external partnerships as they seek to deploy customized solutions. For US organizations aiming to integrate generative AI effectively and harness its benefits fully, a structured strategy will be essential. The key tenets: establish clear AI leadership, prioritize workforce readiness, and select scalable solutions that can be customized to meet unique operational needs to maximize long-term value.