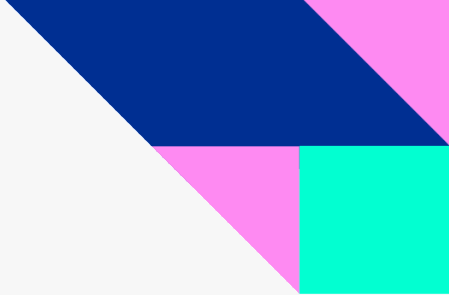




ARTIFICIAL INTELLIGENCE IN THE CORPORATE WORLD - REGIONAL REPORT

JANUARY 2025





TECHNICAL DATA SHEET + SAMPLE SIZE

23 QUESTIONS | SURVEY | 1200 PARTICIPANTS | DECISION MAKERS



53%

AGE

- 56 years or older: 11%
- 45 – 55 years: 20%
- 35 – 44 years: 27%
- 25 – 34 years: 27%
- 18 – 24 years: 15%



COMPANY SIZE

- Large: +250 employees: 23%
- Medium: 41-250 employees: 24%
- Small: 11-40 employees: 37%
- Micro: Less than 10 employees: 15%



47%



25%

(300)



25%

(300)



17%

(200)



17%

(200)



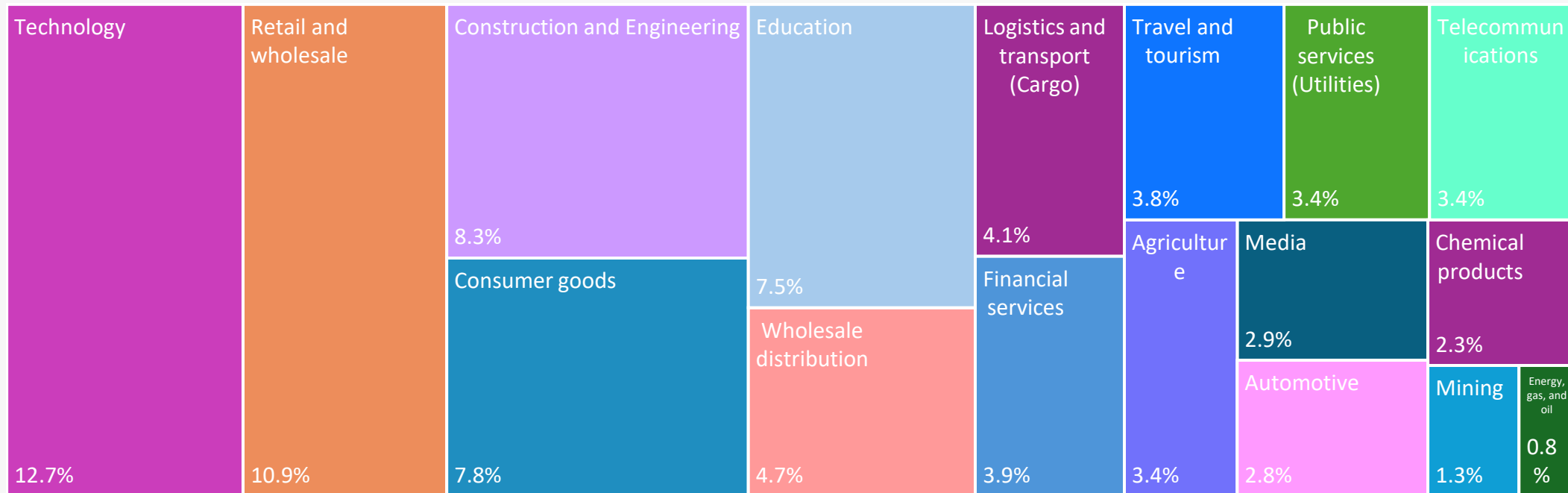
17%

(200)



WE ANALYZED 16 INDUSTRIES, FINDING TECHNOLOGY LEADS WITH 13%, FOLLOWED BY RETAIL AT 11% AND CONSTRUCTION AT 8%

INDUSTRY TO WHICH THE DECISION-MAKERS BELONG



Q2. Which industry does your company belong to?



AGENDA

1. PERCEPTION OF AI IN THE CORPORATE WORLD

2. ADOPTION, IMPLEMENTATION, AND EXPLORATION OF AI

3. CHANNELS

4. MAIN TAKEAWAYS



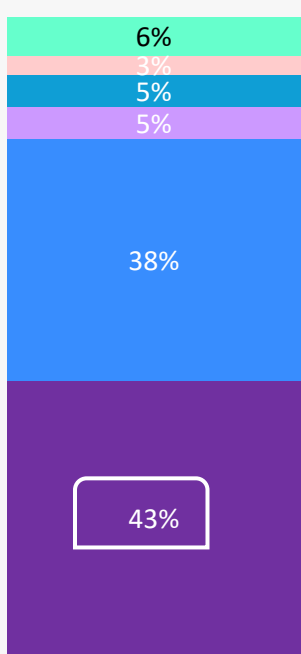
PERCEPTION OF AI IN THE CORPORATE WORLD



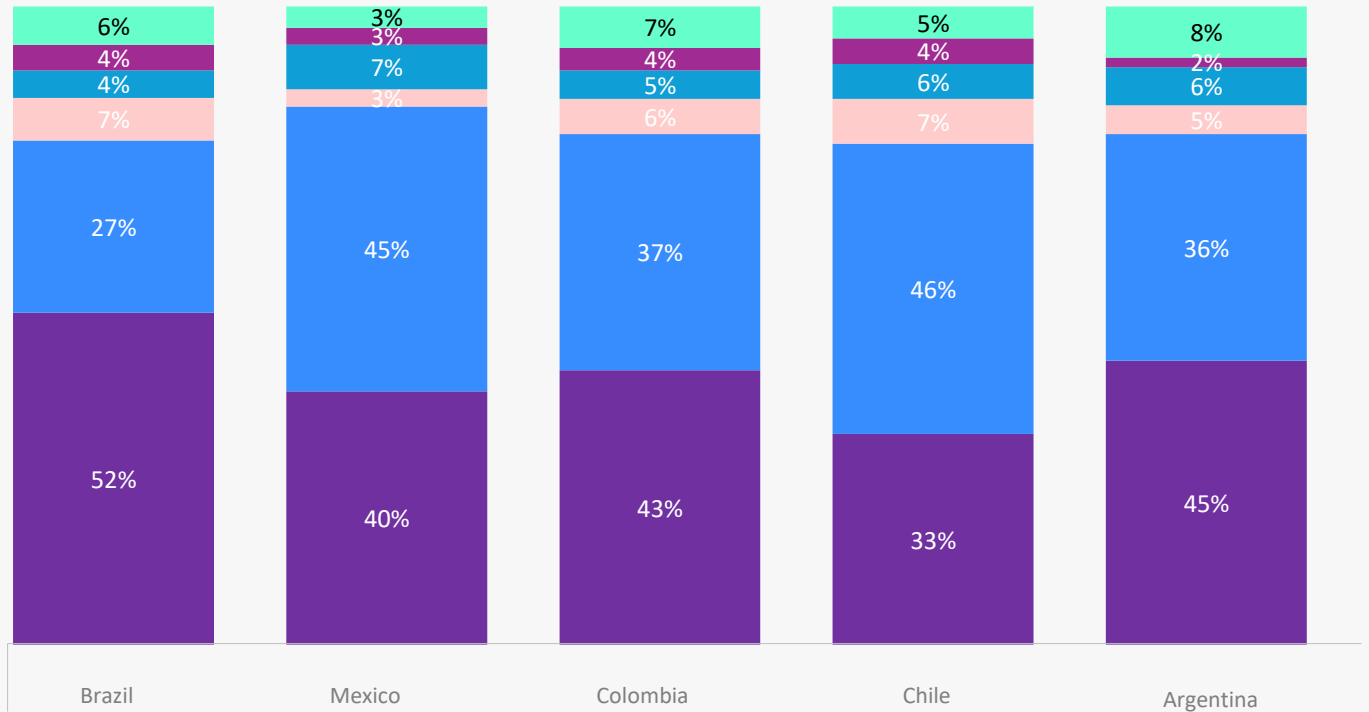
PERCEPTION

A SIGNIFICANT 43% OF DECISION-MAKERS IN LAC VIEW AI POSITIVELY, WITH ANOTHER 38% RECOGNIZING ITS POTENTIAL.

The study suggests that Brazil (52%) and Argentina (45%) exhibit higher levels of optimism towards AI compared to the rest of countries surveyed.



- I don't have a positive or negative stance on AI
- No, I am concerned about the environmental implications and how AI impacts my sustainability indicators
- No, I am concerned about the ethical, privacy, and transparency implications of AI
- No, I think AI is a threat to my industry and my business
- Yes, although I have reservations
- Absolutely, AI will help us automate processes and focus on what truly matters



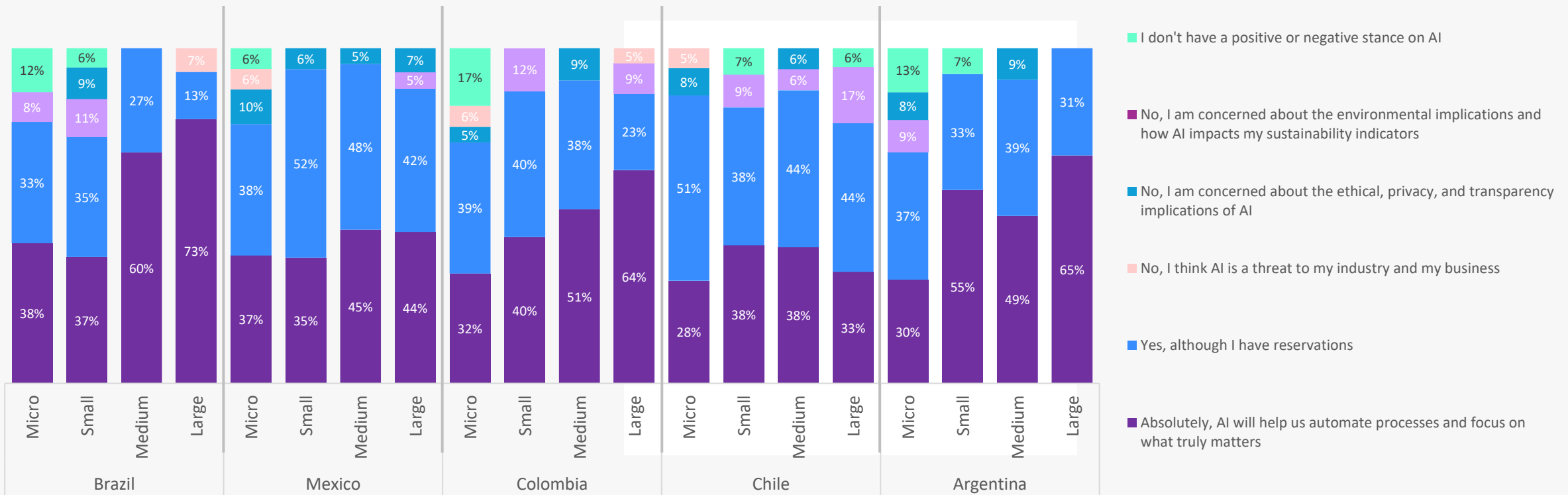
Q18. Do you perceive Artificial Intelligence in a positive way?



PERCEPTION

DATA PER MARKET AND COMPANY SIZE

AI adoption optimism varies by company size. **Large enterprises** in Brazil (73%) and Argentina (65%) are most bullish on AI's potential for process automation and task prioritization. **Medium-sized businesses** also express confidence, with 60% in Brazil and 51% in Colombia anticipating similar benefits. **Small businesses** demonstrate a more mixed outlook, with positive sentiment strongest in Argentina (55%).



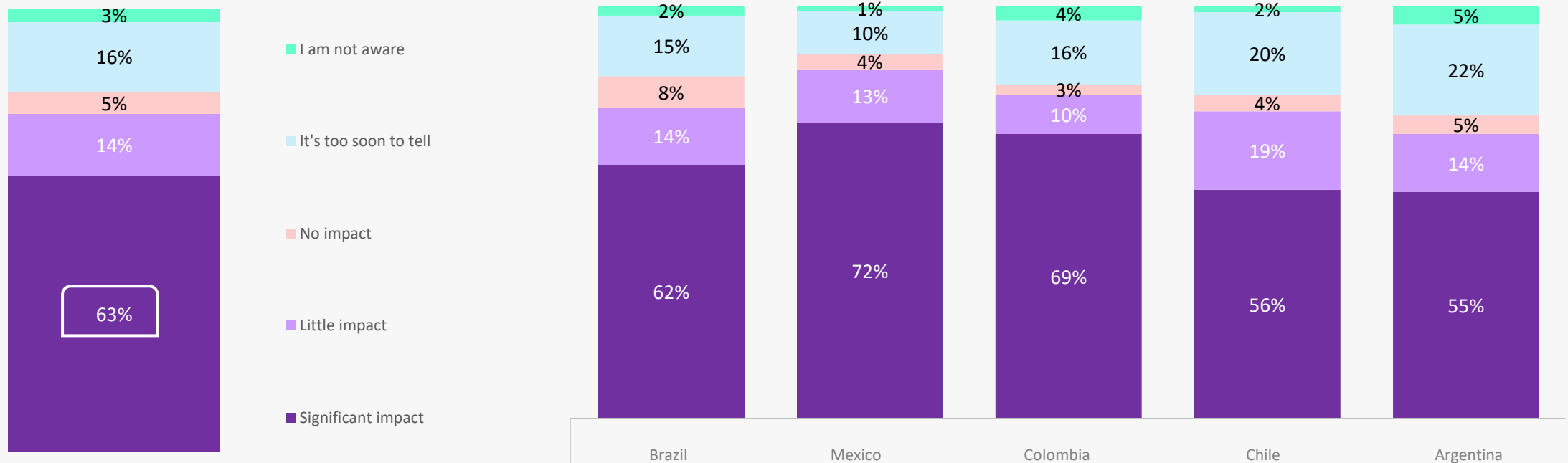
Q18. Do you perceive Artificial Intelligence in a positive way?



PERCEPTION

63% OF LATAM COMPANIES EXPECT AI TO HAVE A SIGNIFICANT IMPACT IN THEIR INDUSTRIES.

Latin American businesses are largely optimistic about the transformative potential of AI. Overall, **63%** expect AI to have a significant impact on their respective industries. This sentiment is particularly strong in **Mexico**, where **72%** of companies hold this view, and in **Colombia**, where the figure is **69%**.



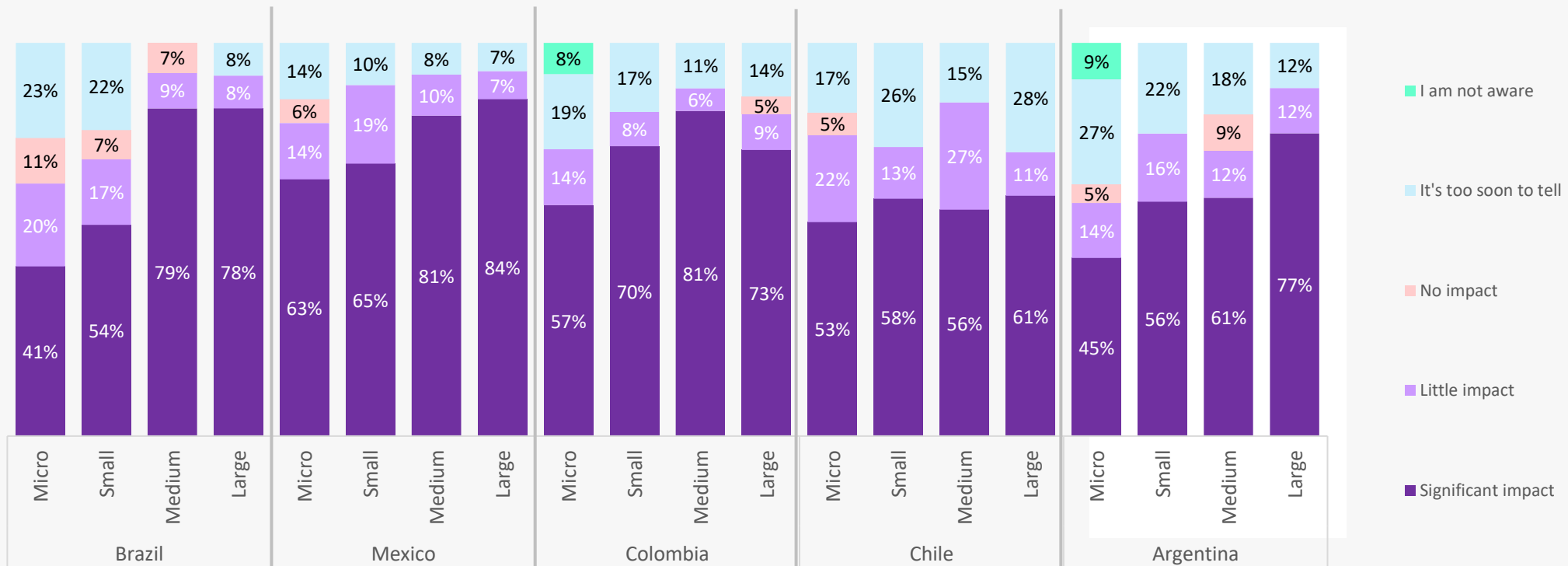
Q21 To what extent do you believe Artificial Intelligence will impact your industry?



PERCEPTION

DATA PER MARKET AND COMPANY SIZE

Expectations regarding AI's industry impact vary by company size across Latin America. **Large enterprises** in Mexico (84%) and Brazil (78%) express the highest confidence in AI's transformative potential. **Medium-sized businesses** in Colombia and Mexico also demonstrate strong optimism (81% in both). **Small businesses** show a more mixed outlook. While a significant proportion in Colombia (70%) and Mexico (65%) anticipate significant impact, a notable percentage in Chile (26%) believe it's too early to assess AI's influence.

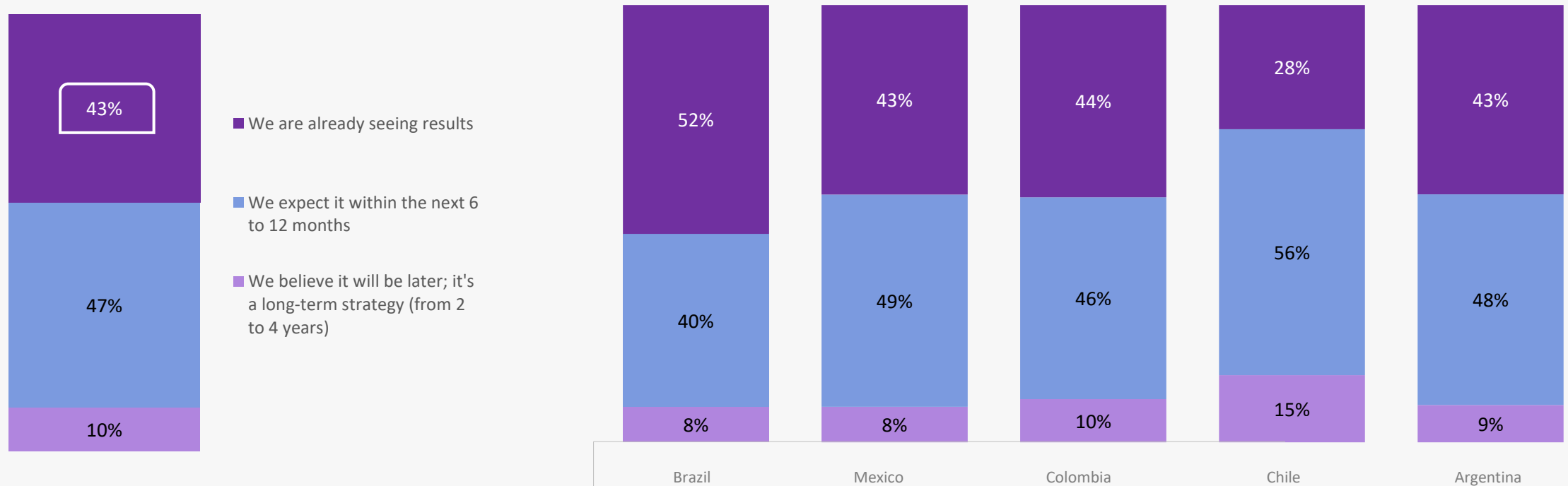




PERCEPTION

43% OF LATAM COMPANIES ARE ALREADY SEEING RESULTS OF THEIR AI STRATEGIES, 47% EXPECT TO SEE IMPACT IN 2025

Currently, **43%** of Latin American companies report seeing tangible results from their AI strategies, with **Brazil** leading at **52%**. An additional **47%** expect to see impact by 2025, with **Chilean** companies expressing the highest optimism (**56%**).



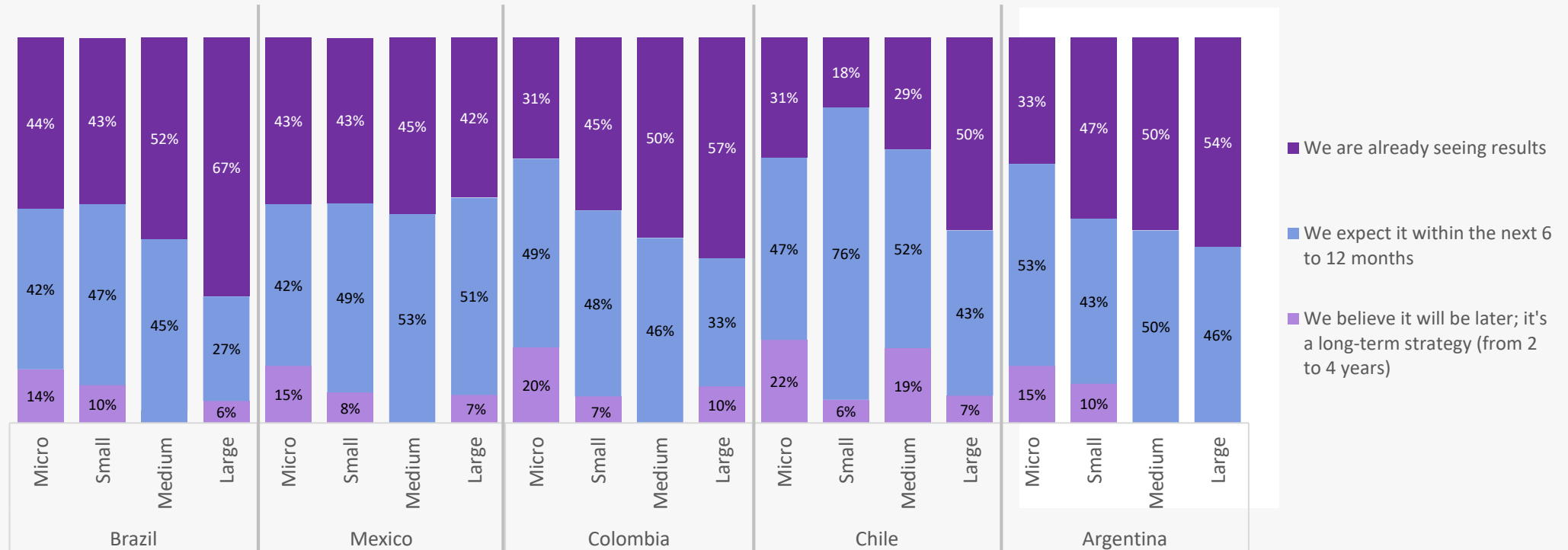
Q15. How long do you estimate it will take for Artificial Intelligence to impact your business efforts?



PERCEPTION

DATA PER MARKET AND COMPANY SIZE

Latin American companies of all sizes demonstrate varying levels of AI adoption and impact. Among **small businesses**, 47% in Argentina and 45% in Colombia are already seeing results, while a significant 76% of Chilean companies anticipate impact by 2025. **Medium-sized enterprises** report results in Brazil (52%), Colombia (50%), and Mexico (45%), with Mexican companies also expecting further progress within the next 6-12 months (53%). **Large companies** lead in AI maturity, with 67% in Brazil and 57% in Colombia already experiencing tangible benefits.



Q15. How long do you estimate it will take for Artificial Intelligence to impact your business efforts?



MAIN BENEFITS OF AI IN LAC: EFFICIENCY & PRODUCTIVITY, IMPROVED CUSTOMER SERVICE, AND COST REDUCTIONS

Artificial intelligence is gaining traction among businesses in the region, who see its potential to drive significant improvements in **efficiency, productivity, customer service, and cost savings**. Contrary to fears of widespread job losses, AI is also perceived as a complement to human capabilities. Specifically, **18%** of businesses view AI as an **ally in decision-making**, while **17%** appreciate its role in **reducing human error**, highlighting its supportive function.

BENEFITS OF AI AS PERCEIVED BY DECISION-MAKERS

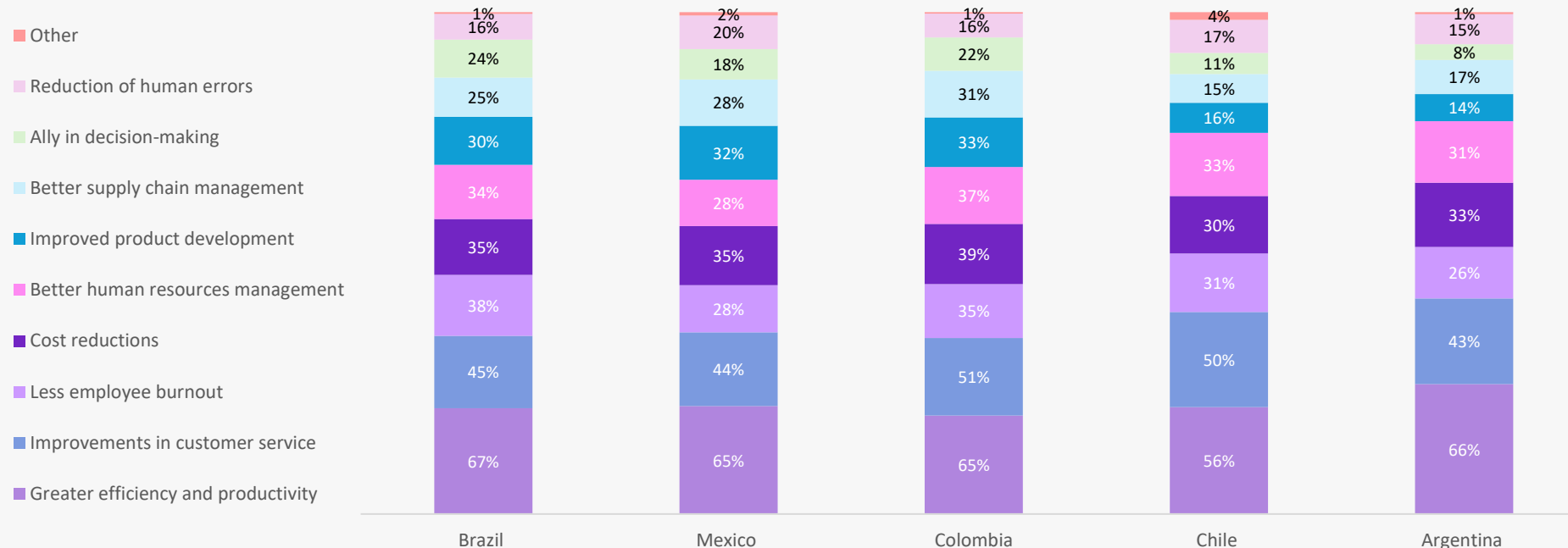


Q11. What benefits has your company identified after implementing Artificial Intelligence solutions?

DATA PER MARKET

Businesses across LAC recognize the potential of AI to drive significant improvements in **efficiency, productivity, and customer service**. While these benefits are widely acknowledged, other key advantages vary by market. **Cost reduction** is the third focus for companies in Argentina, Colombia, and Mexico, whereas Brazilian businesses prioritize **mitigating employee burnout**, and Chilean companies emphasize **enhanced HR management**. Additionally, a notable trend emerges in Brazil, Mexico, and Colombia, where **supply chain management** (25%, 28%, and 31%) and **product development** (30%, 32%, and 33%) are receiving significant attention, reflecting a strategic focus on operational excellence and innovation.

BENEFITS OF AI AS PERCEIVED BY DECISION-MAKERS



Q11. What benefits has your company identified after implementing Artificial Intelligence solutions?

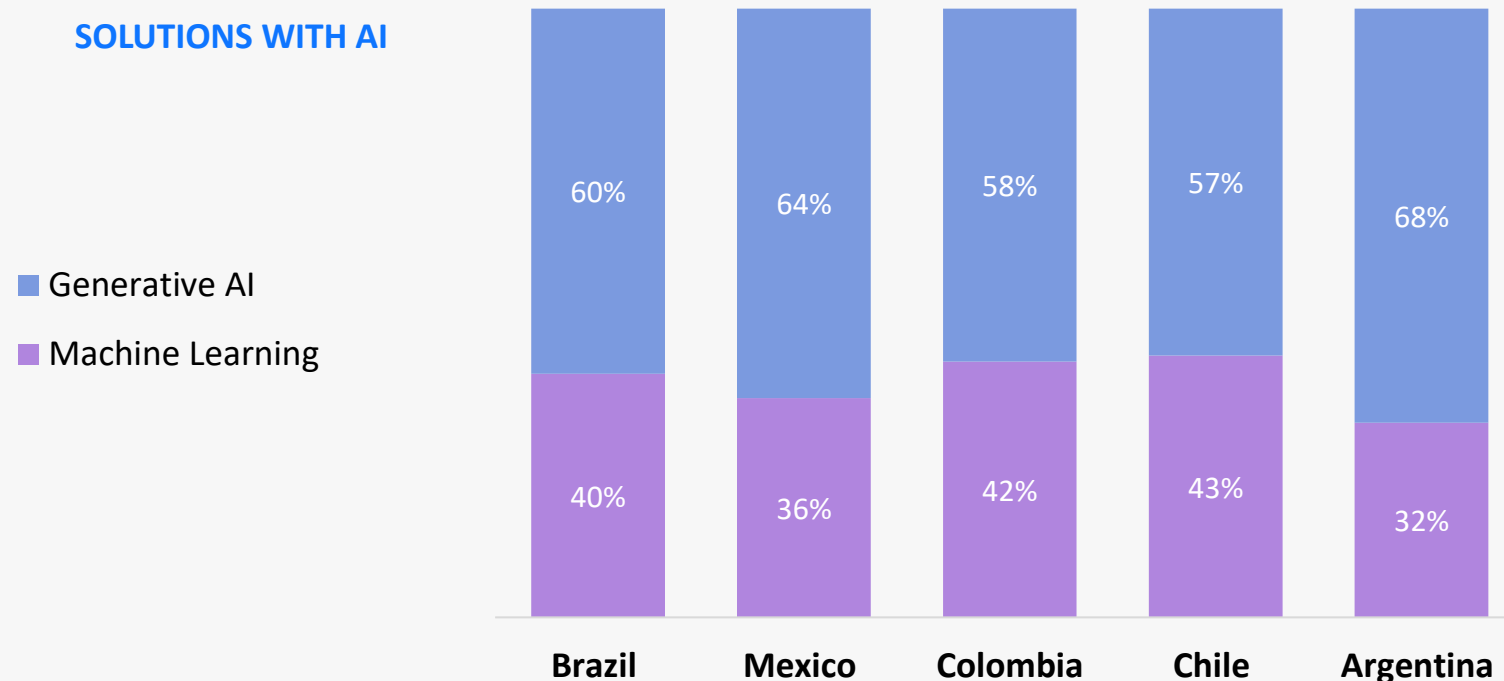


61% of AI solutions implemented by companies are Generative AI, showcasing its growth in creative and adaptive capabilities.

38% of AI solutions are driven by Machine Learning, highlighting its role in process optimization and predictive analysis within organizations.

GENERATIVE AI DRIVES PREFERENCE, WITH OVER HALF OF COMPANIES ADOPTING IT NOW

Generative AI is having a significant impact on business strategies throughout Latin America, becoming the preferred technology across all surveyed markets. **Argentina** leads the region in adoption, with **68%** of businesses utilizing generative AI. **Machine learning** continues to play a vital role, with adoption rates ranging from **32%** to **43%**, underscoring its value in predictive analytics and process optimization. This landscape demonstrates how Latin American businesses are strategically leveraging these technologies to drive innovation and enhance efficiency, ultimately transforming their business models.



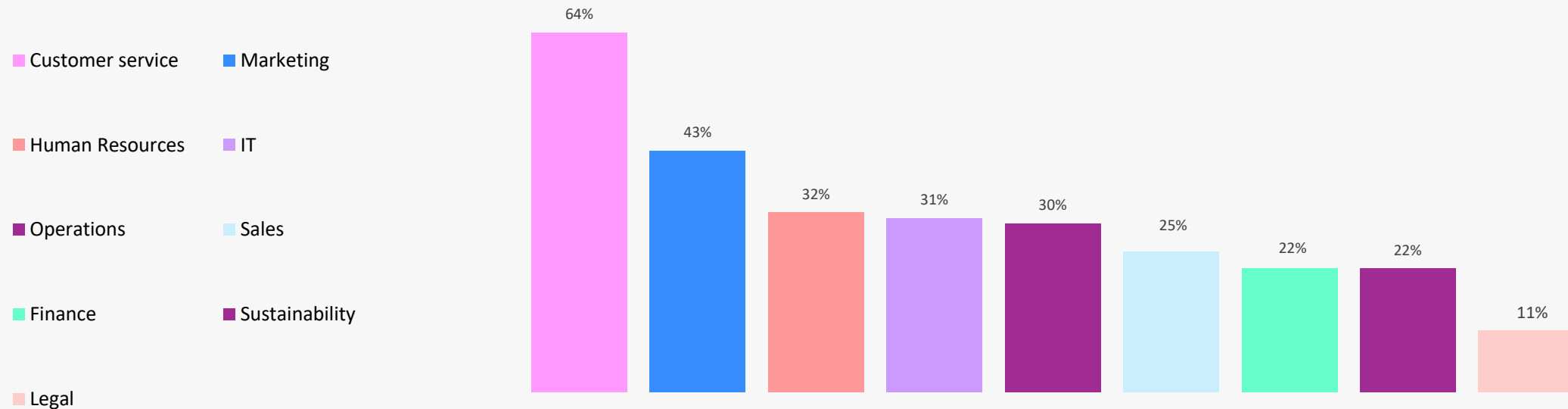
Q8. What type of AI-related business solutions does your company use?



CUSTOMER SERVICE AND MARKETING, THE AREAS LEADING THE AI IMPLEMENTATION

Customer Service is the most AI-integrated sector at **64%**, highlighting its importance in automation and efficiency. Marketing at **43%**, Human Resources at **32%**, and IT **31%** also show significant AI adoption, indicating a growing trend in business operations and digital transformation. Meanwhile, Legal **11%** remains the least AI-driven sector, likely due to regulatory complexities and reliance on human expertise.

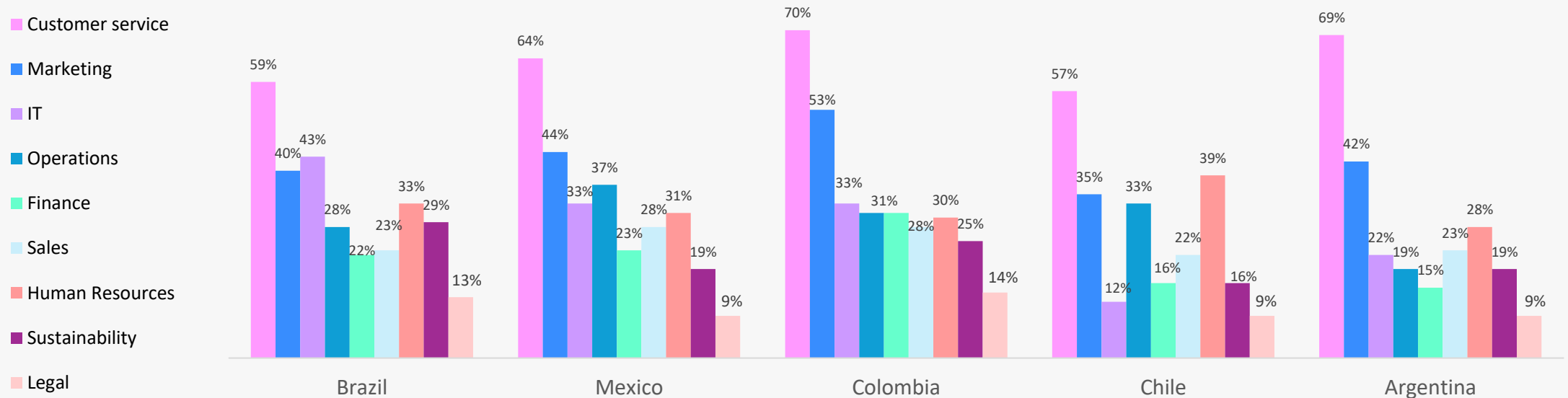
AREAS LEADING AI IMPLEMENTATION





CUSTOMER SERVICE, IT AND MARKETING: LEADERS IN AI ADOPTION ACROSS LATIN AMERICA

AREAS THAT USE AI SOLUTIONS



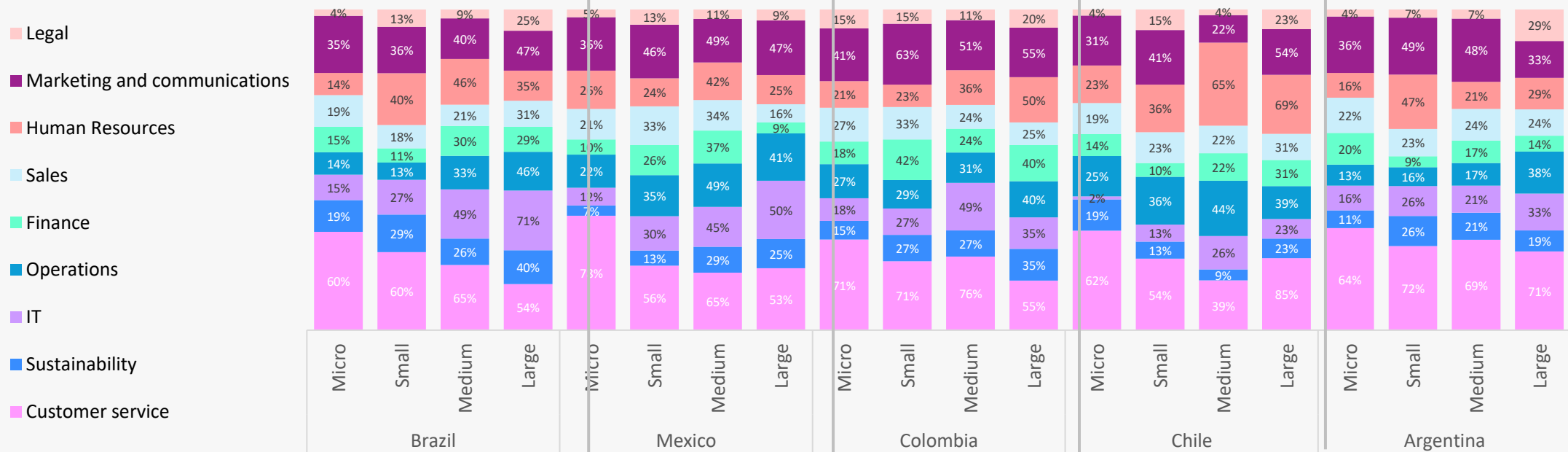
Q10. Which areas of your company use Artificial Intelligence solutions? Check all that apply.



DATA PER MARKET AND COMPANY SIZE

This chart reveals that SMEs in Latin America are adopting AI in various areas of their businesses. **Customer service** is the department that benefits the most from this technology, with **Colombia** and **Argentina** leading the way. **Human Resources** is another department benefiting from AI integration within **small companies**, particularly in **Argentina (47%)** and **Brazil (40%)**. Among **medium-sized companies**, **HR** also stands out, most notably in **Chile (65%)**. **Marketing and communications** departments across most surveyed countries are also widely utilizing AI, ranking second in adoption.

AREAS THAT USE AI SOLUTIONS



Q10. Which areas of your company use Artificial Intelligence solutions? Check all that apply.

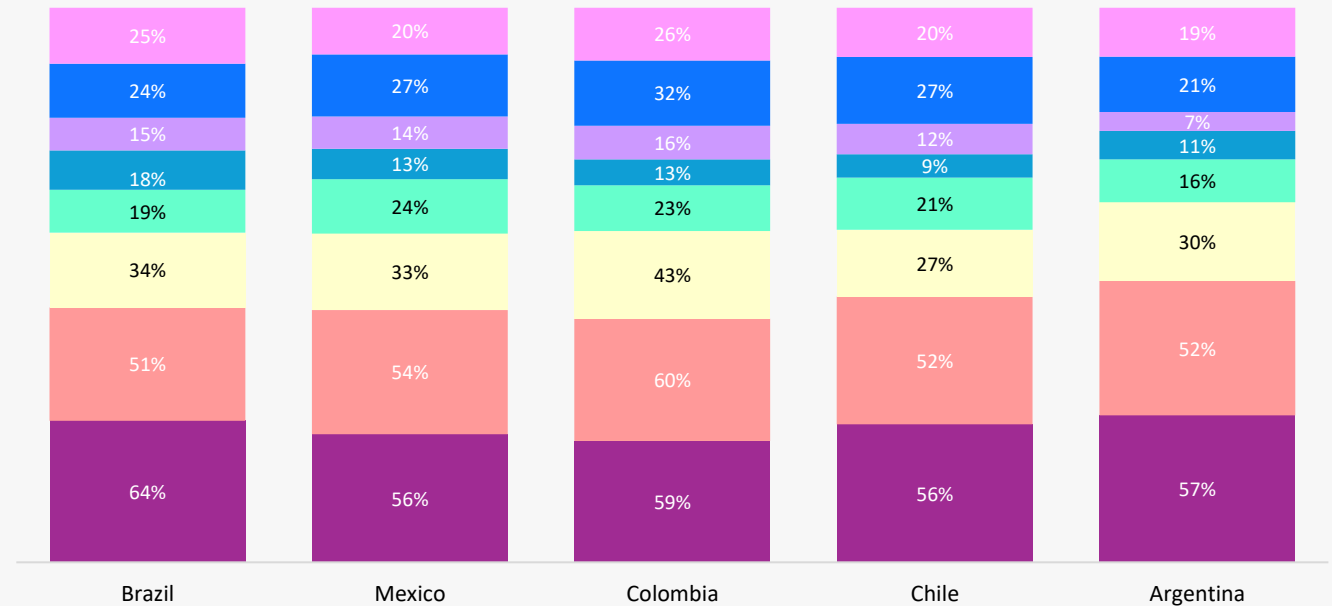
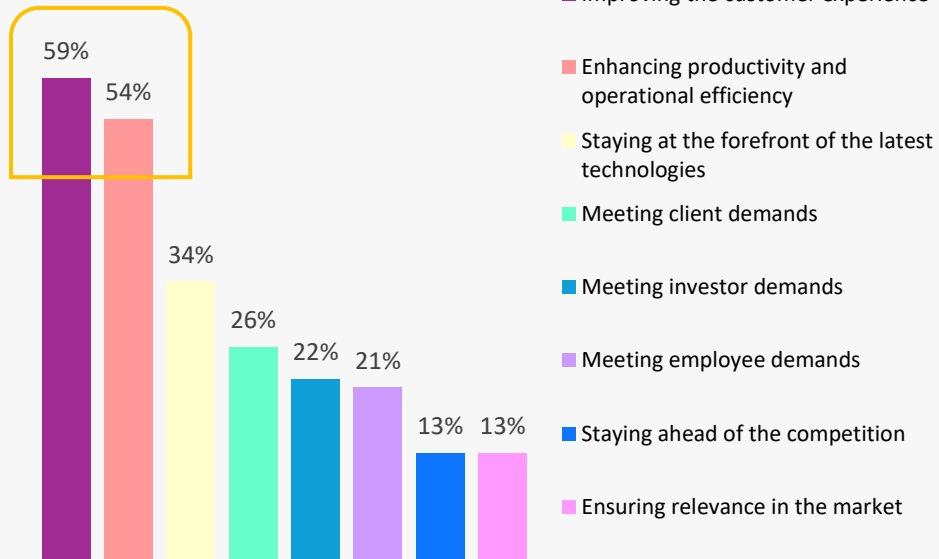


ADAPTATION, IMPLEMENTATION, AND EXPLORATION OF AI

DRIVERS AND OBSTACLES

59% OF LATAM COMPANIES ADOPT AI TO IMPROVE CUSTOMER EXPERIENCE, WHILE 54% TO ENHANCE PRODUCTIVITY AND EFFICIENCY

DRIVERS



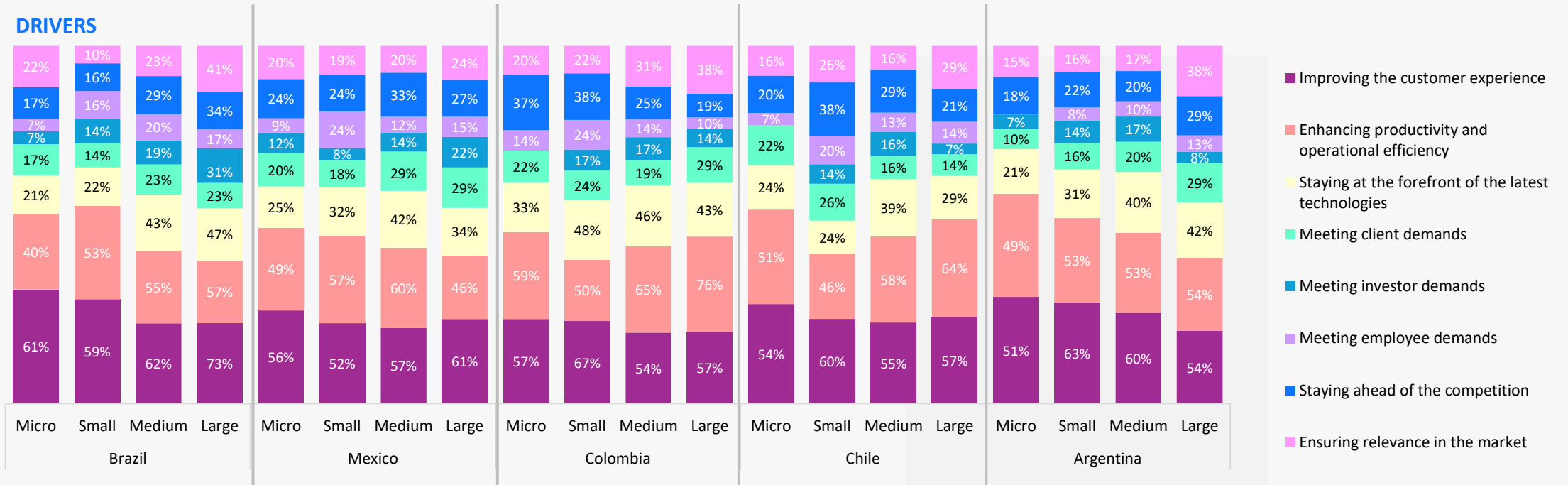
Q14. What are the reasons that have driven your company to adopt or consider an Artificial Intelligence strategy?

DRIVERS AND OBSTACLES

DATA PER MARKET AND COMPANY SIZE

Latin American businesses are primarily motivated to adopt AI by the desire to improve **customer experience (59%)**. This driver is particularly strong among **large enterprises in Brazil (73%)**. **Enhancing productivity & operational efficiency** is another key motivator, influencing **54%** of businesses on average, and especially relevant for **SMEs in Colombia and Mexico**. For **SMEs in Colombia, staying at the forefront of technology** is a significant factor. Competitive pressures also play a role, with **small businesses in Chile and Colombia (38% each)** seeking to **stay ahead of the competition**, and **large enterprises in Brazil (41%), Argentina (38%), and Colombia (38%)** prioritizing **market relevance** to avoid falling behind.

DRIVERS



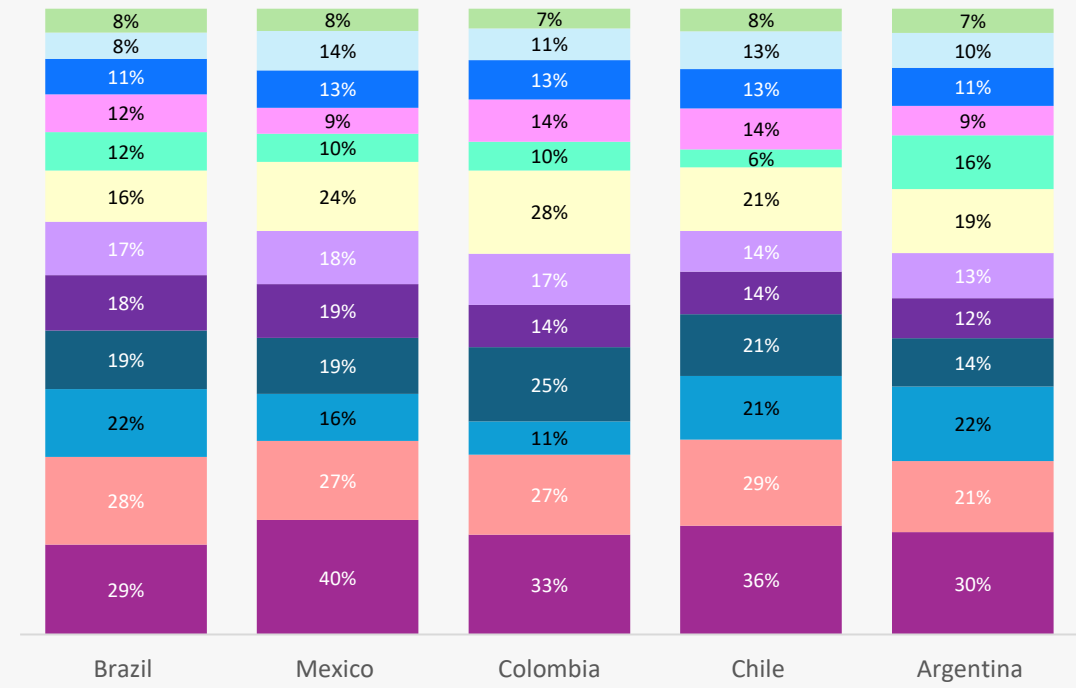
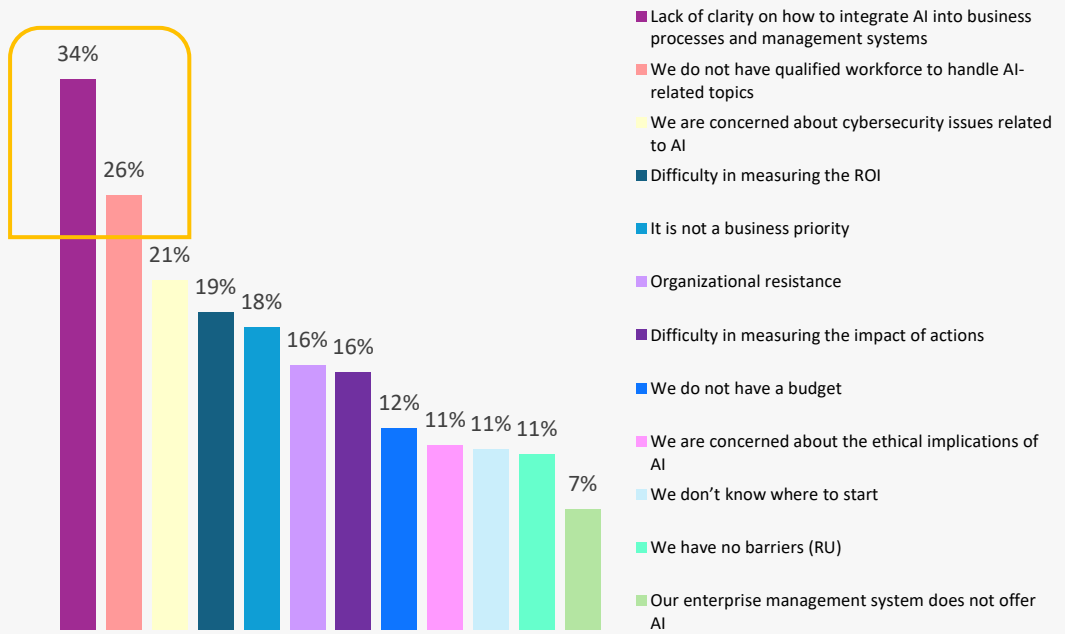
Q14. What are the reasons that have driven your company to adopt or consider an Artificial Intelligence strategy?



DRIVERS AND OBSTACLES

LACK OF CLARITY IN HOW TO INTEGRATE AI AND QUALIFIED WORKFORCE: THE MAIN OBSTACLES FOR THE REGION

OBSTACLES



Q17. What are the main barriers your organization faces in implementing or expanding efforts in Artificial Intelligence?

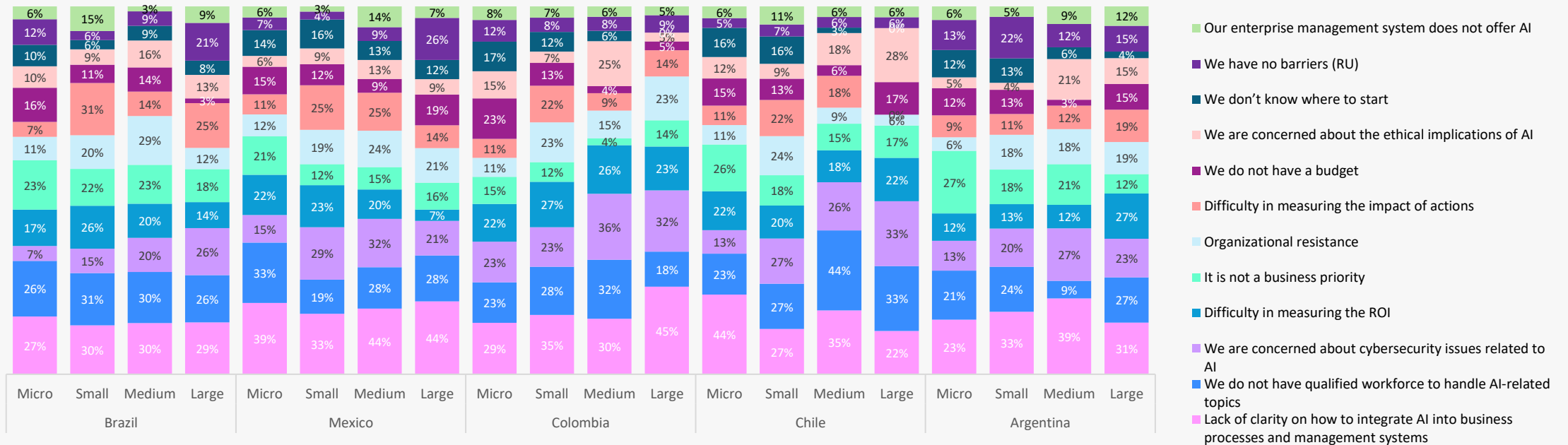


DRIVERS AND OBSTACLES

DATA PER MARKET AND COMPANY SIZE

The primary obstacle to AI adoption in Latin America is the lack of clarity regarding how to integrate AI with existing business processes. This challenge is particularly acute for **medium and large enterprises in Mexico (44%)** and **small businesses in Colombia (35%)**. **Cybersecurity** is another significant concern, especially for **large companies in Chile (33%)** and **Colombia (32%)**. **Medium-sized businesses** struggle with a **shortage of skilled AI professionals**, notably in **Chile (44%)** and **Colombia (32%)**. **Small businesses** face the additional hurdle of **proving return on investment (Colombia: 27%, Brazil: 26%)**, while also grappling with a **lack of skilled personnel in Brazil (31%)**.

OBSTACLES



Q17. What are the main barriers your organization faces in implementing or expanding efforts in Artificial Intelligence?

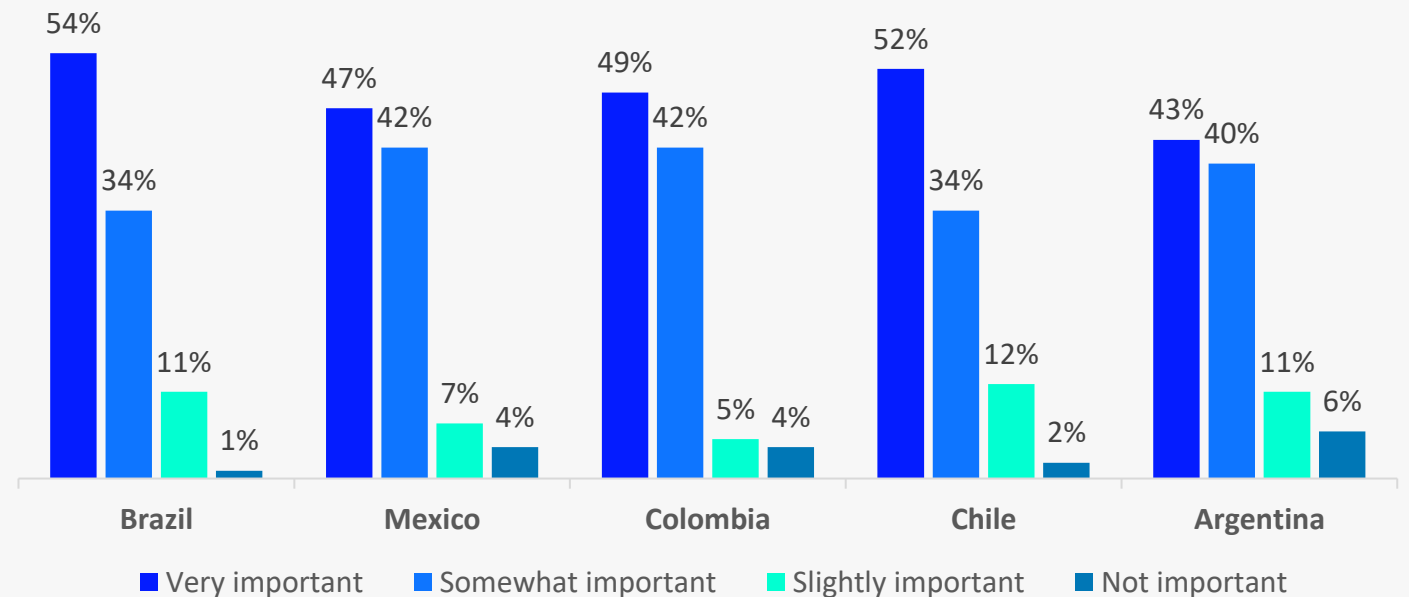
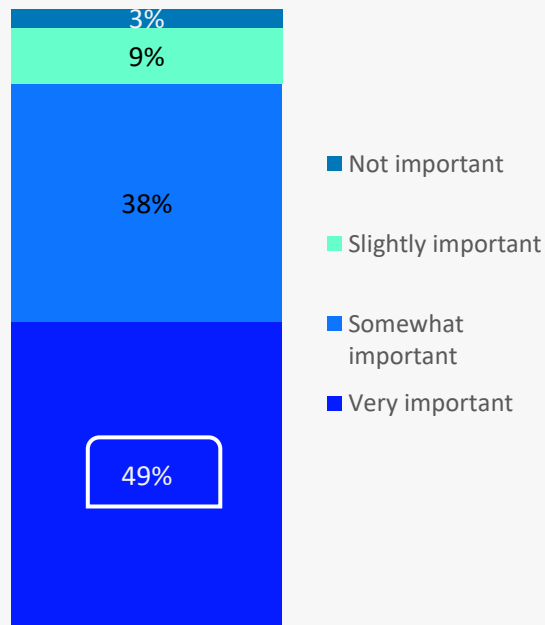


DRIVERS AND OBSTACLES

SUSTAINABILITY IS A KEY DRIVER FOR 49% OF COMPANIES

Sustainability is a key consideration for Latin American businesses implementing AI. **Brazil (54%)** and **Chile (52%)** are at the forefront of this trend, with a strong focus on integrating environmental and social factors into their AI strategies. **Colombia (49%)** and **Mexico (47%)** also demonstrate a commitment to sustainability, while **Argentina** reports slightly lower prioritization (**43%**). These findings suggest that sustainability is increasingly viewed as an integral part of business innovation and growth, rather than a separate concern.

IMPORTANCE OF PRIORITIZING SUSTAINABILITY CONSIDERATIONS AND THE IMPLEMENTATION OF AI SOLUTIONS WITHIN THE COMPANY



Q20. How important is it for your company to prioritize sustainability considerations when implementing Artificial Intelligence solutions?



52% of surveyed decision-makers say that their AI implementation strategy has expanded, as they explore new solutions and teams putting it into practice.

Q9. How has your company's strategy for implementing Artificial Intelligence solutions evolved in the last 12 months?

55% of surveyed decision-makers plan to increase their AI investment compared to 2024.

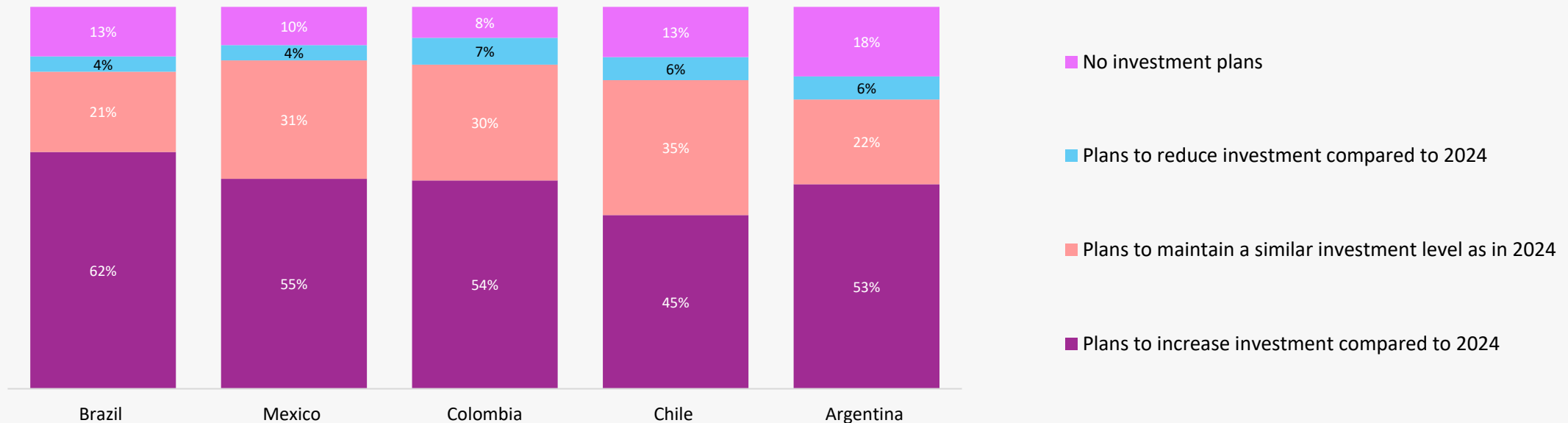
Q16. In terms of investment in Artificial Intelligence solutions, what are your company's plans for 2025?



INVESTMENT IN AI IS SET TO RISE ACROSS THE REGION

Most businesses in **Brazil (62%)**, **Mexico (55%)**, and **Colombia (54%)** intend to **increase their AI spending** in 2025, indicating robust growth in the regional AI market. However, a considerable share of companies in **Chile (35%)** and **Mexico (31%)** plan to **maintain their current levels of investment**. While few businesses plan to **reduce AI spending (4% to 7%)**, **Argentina (18%)**, **Chile (13%)**, and **Brazil (13%)** have the largest proportion of companies with **no plans for AI investment**, demonstrating varying levels of commitment to AI adoption across the region.

LEVEL OF INVESTMENT BY COUNTRY

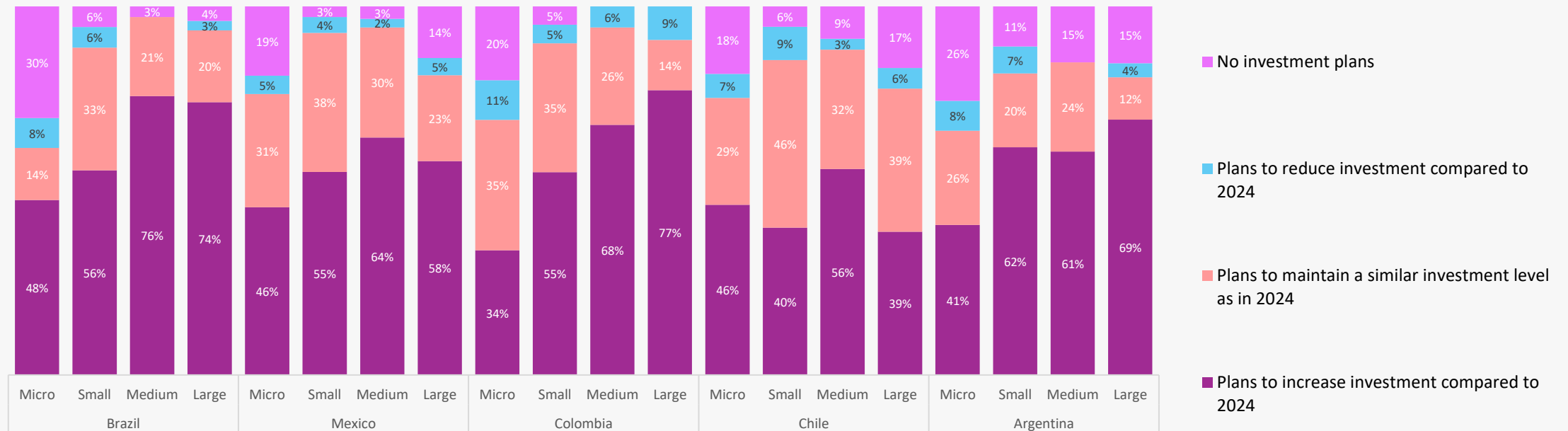




MEDIUM AND LARGE COMPANIES LEAD AI INVESTMENT GROWTH

Across all five countries surveyed, large companies are the most committed to increasing AI investment: with **77%** in Colombia, **74%** in Brazil and **69%** in Argentina planning to expand their budgets. Medium-sized companies follow a similar trend, with **76%** in Brazil, Colombia at **68%** and Mexico at **64%** planning increased AI investment. In contrast, small businesses are more likely to maintain their current AI spending, particularly in Chile at **46%**, Mexico at **38%** and Colombia at **35%**. Additionally, plans to reduce investment remain low at **3% to 11%** across all business sizes, indicating overall confidence in AI's future value.

LEVEL OF INVESTMENT BY COUNTRY AND COMPANY SIZE



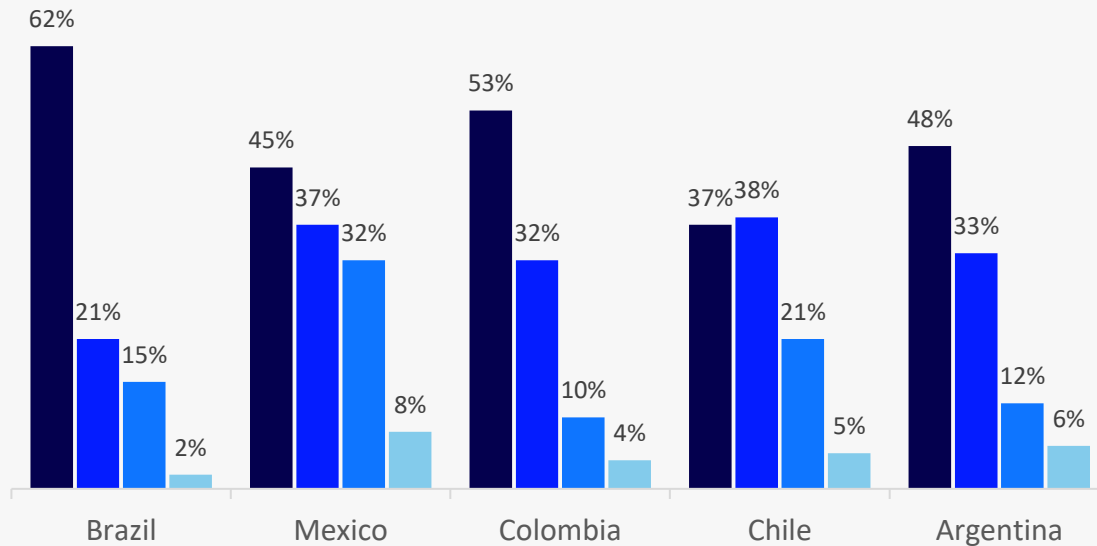


HUMAN TALENT

50% OF LATAM COMPANIES ALREADY INVEST IN AI TRAINING FOR THEIR TEAMS, WHILE 46% EXPECTS TO START IN 2025

While **50%** of Latin American companies are **currently investing in AI training**, a near-equal proportion (**46%**) **plans to begin such investments in 2025**, suggesting significant growth in the near future. **Brazil** leads current investment (**62%**), followed by **Colombia** (**53%**).

TEAM TRAINING IN AI



Yes

50%

No, we are planning it within the next 6 months

32%

No, we are planning it by mid-2025

14%

We do not have it planned

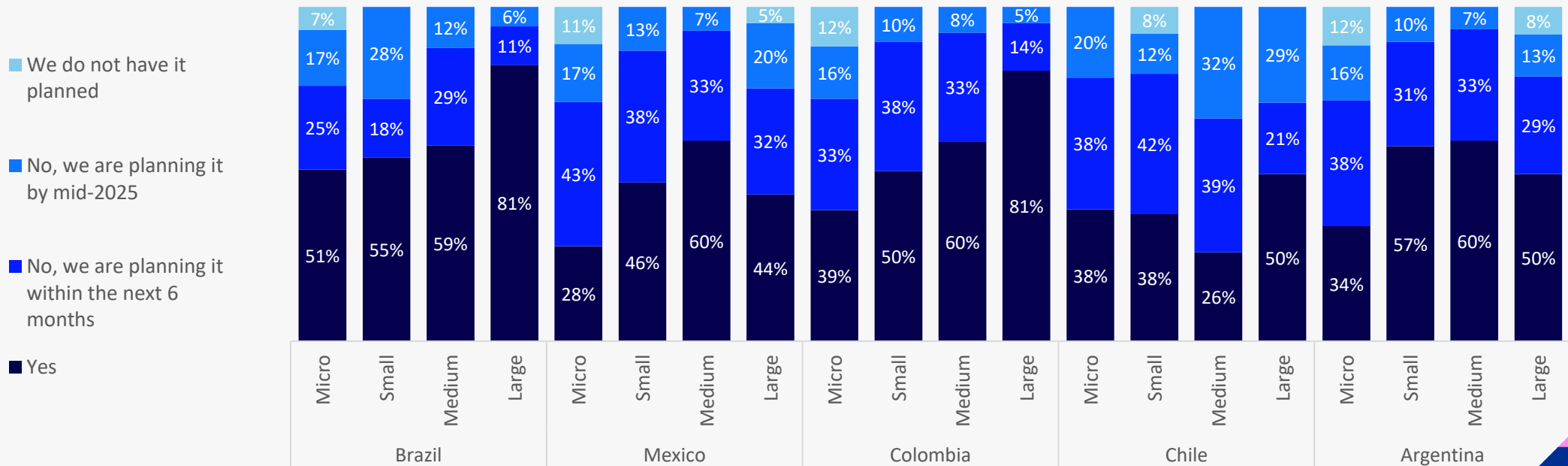
4%



DATA PER MARKET AND COMPANY SIZE

Large enterprises in Latin America are at the forefront of AI training investments, with **81%** of **large companies** in both **Brazil** and **Colombia** already providing training for their teams. **Medium-sized businesses** are also actively participating, with **60%** in **Argentina, Colombia, and Mexico** having implemented training programs. **Small businesses** are gradually embracing AI training, with **42%** in **Chile** and **38%** in **Mexico and Colombia planning to launch programs in the first half of 2025**. These trends demonstrate a proactive approach to AI readiness among large and medium-sized companies, with small businesses showing increasing adoption.

TEAM TRAINING IN AI



Q12. Do you invest in training for your team to leverage AI?

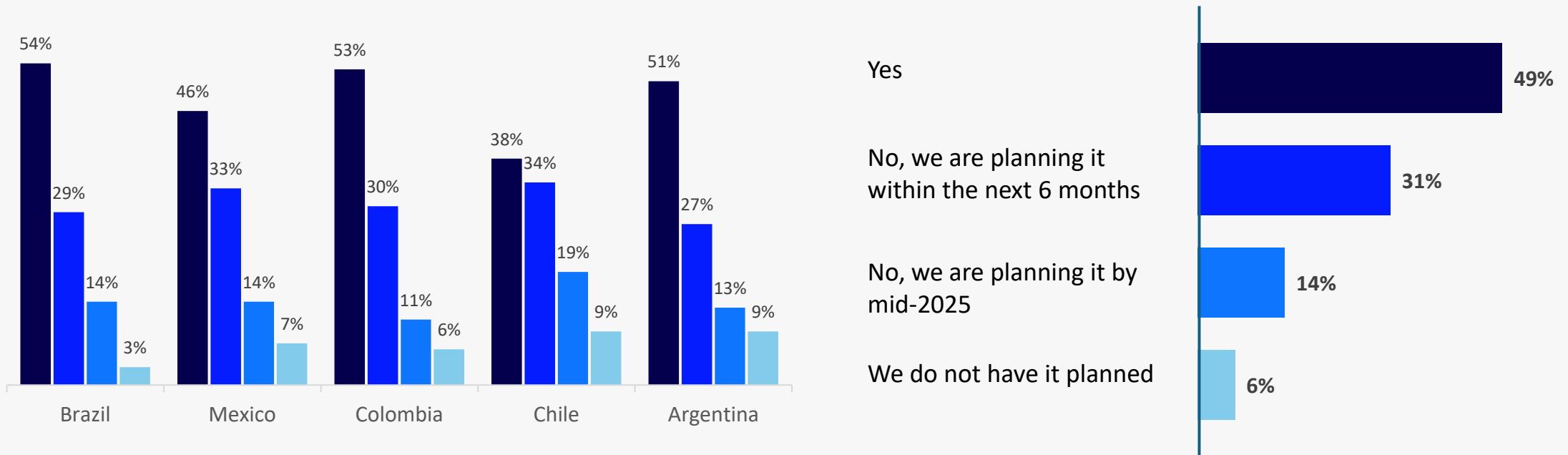


HUMAN TALENT

49% OF LATAM COMPANIES ARE HIRING AI TALENT, 45% IS EXPECTING TO START IN 2025

While nearly half of Latin American companies are **currently hiring employees** with AI experience (with **Brazil at 54%** and **Colombia at 53%**), a similar proportion (**45%**) **plans to begin hiring AI personnel in 2025**, suggesting substantial growth in the AI talent market. **Chile (53%)** and **Mexico (47%)** are expected to lead this next wave of hiring.

HIRING STAFF WITH EXPERIENCE IN AI SOLUTIONS



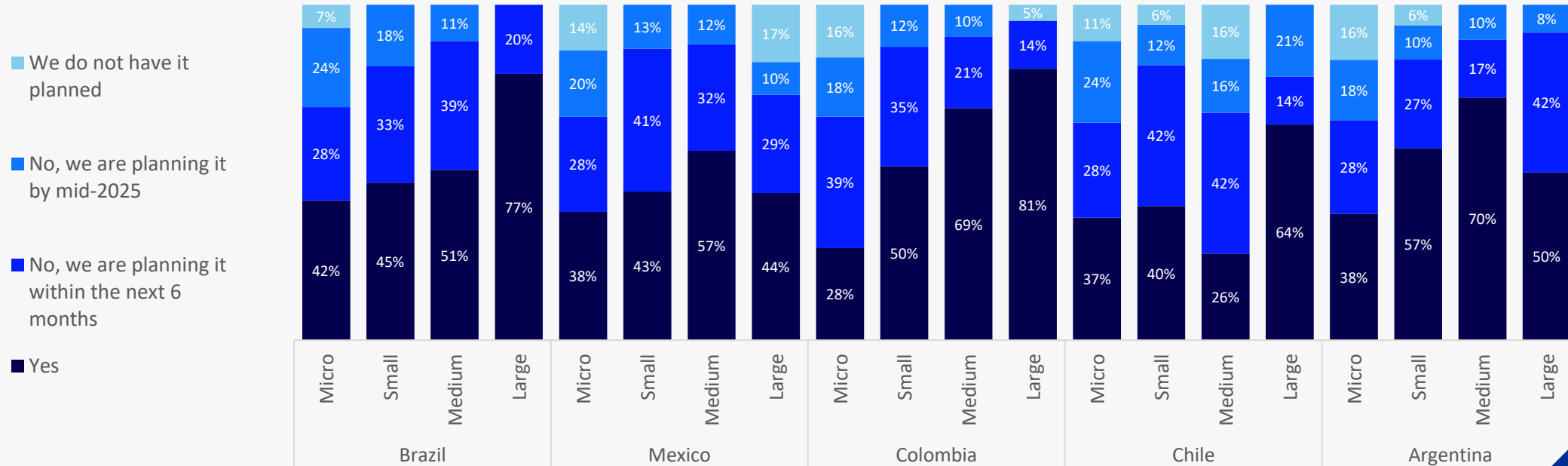
Q13. Are you hiring people with AI experience to accelerate innovation in your company?



DATA PER MARKET AND COMPANY SIZE

Large enterprises across Latin America are leading the acquisition of AI expertise, with **81% of large companies in Colombia** and **77% in Brazil** already **actively hiring**. **Medium-sized businesses** are also demonstrating a proactive approach to AI recruitment, with **70% in Argentina** and **69% in Colombia** investing in talent acquisition. **Small businesses**, while showing slower adoption, are gradually catching up, with **42% in Chile** and **41% in Mexico** **planning to begin hiring in the first half of 2025**. Notably, only a small fraction of companies (**3% to 9%**) across all sizes currently **have no plans to hire AI personnel**. These trends reflect a strong focus on AI talent among larger organizations, with smaller firms progressively integrating into the AI-driven workforce.

HIRING STAFF WITH EXPERIENCE IN AI SOLUTIONS



Q13. Are you hiring people with AI experience to accelerate innovation in your company?



CHANNELS

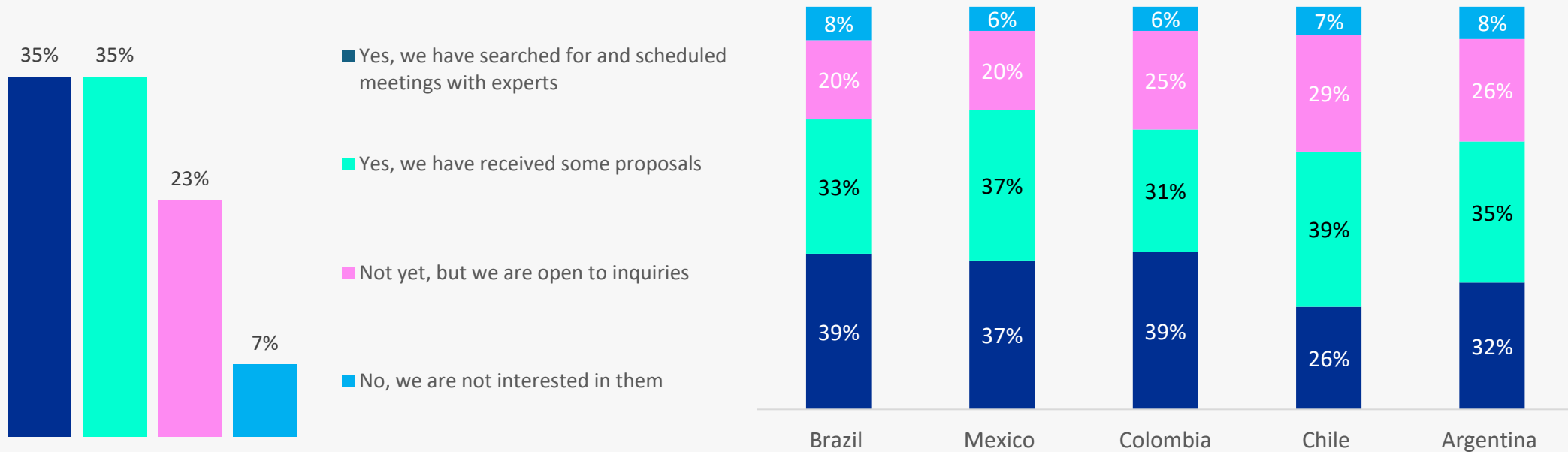


CHANNELS

AI IMPLEMENTATION: A TOP PRIORITY FOR 70% OF LATAM COMPANIES

Latin American businesses are actively exploring AI solutions, as evidenced by the **70%** of companies that consulted with technology providers in 2024 regarding AI implementation and advancement. **Mexico** demonstrated particularly strong engagement, with a consultation rate of **74%**.

MEETINGS WITH PROVIDERS



Q23 During 2024, did you consult technology providers on how to advance or implement Artificial Intelligence in your company?

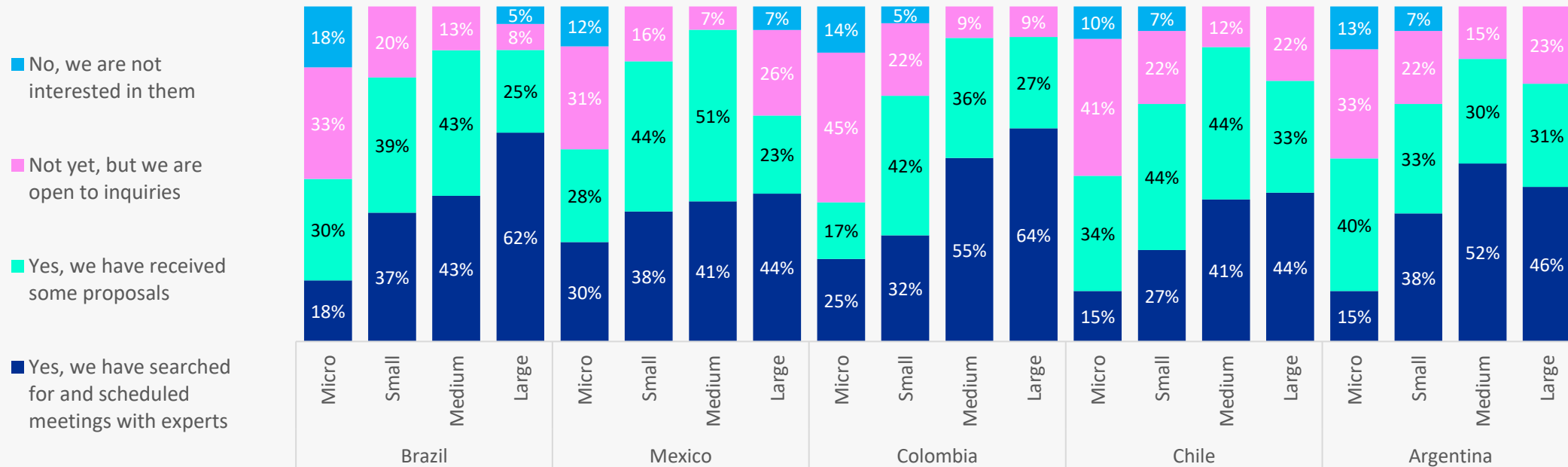


DATA PER MARKET AND COMPANY SIZE

Large enterprises across Latin America are at the forefront of **engagement with AI technology providers**. **Colombia (91%)** and **Brazil (87%)** demonstrate particularly strong engagement, with the vast majority of **large companies** having either **consulted with experts or received proposals for AI implementation**. **Medium-sized businesses** are also actively engaging with IT experts, with high participation rates in **Mexico (92%)** and **Colombia (91%)**. **Small businesses**, while showing lower engagement rates, are **open to exploring AI solutions**, with **22%** in **Argentina, Chile, and Colombia** expressing interest. These findings underscore the proactive approach of larger firms to advancing AI strategies, while smaller enterprises are still in the exploratory phase.

* The percentages combine both types of "Yes" answers (blue and green bars)

MEETINGS WITH PROVIDERS

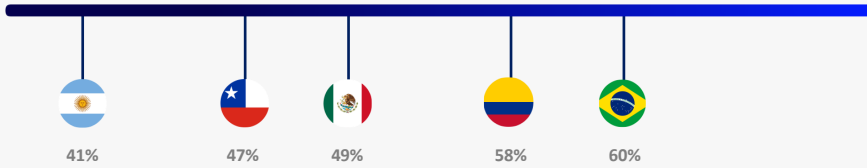




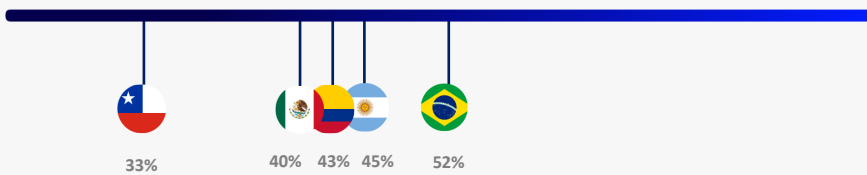
MAIN TAKEAWAYS

MARKET'S BALANCE

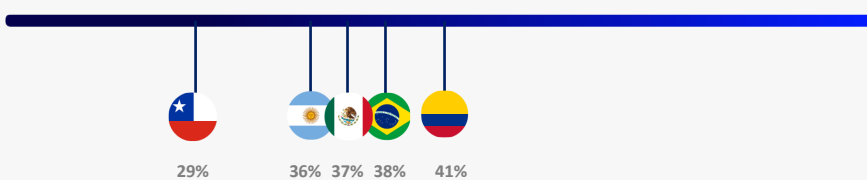
DIGITAL NATIVES



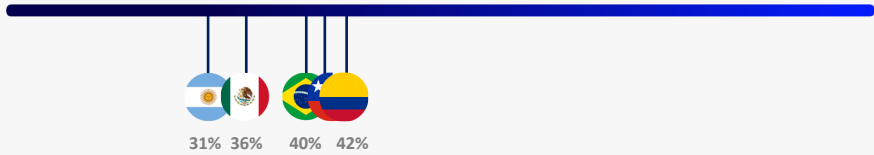
POSITIVE AI PERCEPTION



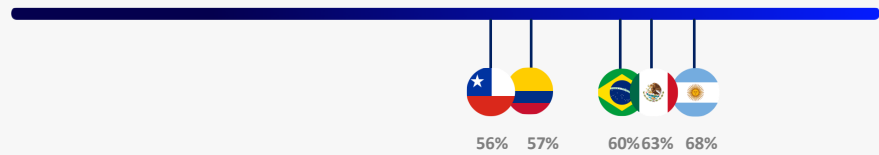
IMPLEMENTATION OF AI-RELATED SOLUTIONS



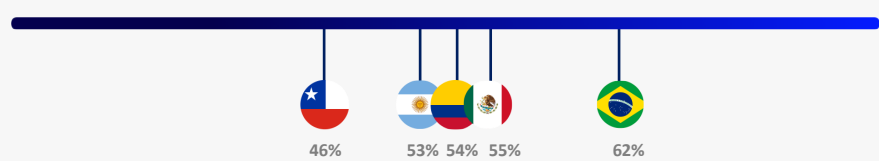
MACHINE LEARNING



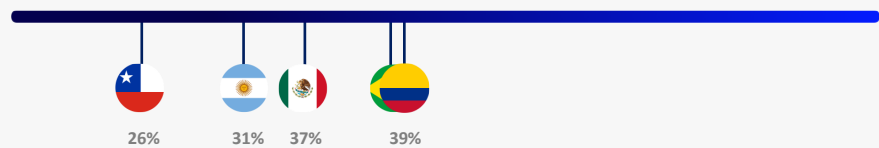
GENERATIVE AI



INVESTMENT IN AI



CONSULTATION WITH PROVIDERS





MAIN TAKEAWAYS

AI OPTIMISM ON THE RISE: 43% OF LATAM COMPANIES POSITIVE

A significant portion (**43%**) of Latin American businesses hold a positive view of artificial intelligence. **Brazil** exhibits the highest level of positive perception (**52%**), followed by **Mexico**, **Argentina**, and **Colombia**, all with positive sentiment above **40%**. Chile expresses the most skepticism (33%). Despite these varying levels of optimism, **63%** of companies are already seeing **the impact of AI** on their industries. **Mexico** leads in reported impact (**72%**), followed by **Colombia** (**69%**) and **Brazil** (**62%**), with **Chile** and **Argentina** also reporting **impact above 55%**. The vast majority of companies (**90%**) expect to see continued or new AI-driven results in 2025.

LACK OF CLARITY: TOP AI CHALLENGE FOR BUSINESSES

Integrating AI effectively is the primary challenges facing **34%** of businesses in the region. Concerns about unclear AI implementation are highest in **Mexico (40%)**, followed by **Chile (36%)**. A shortage of **skilled AI workers** is another significant hurdle, affecting approximately **26%** of companies across all markets. **Cybersecurity** also poses a challenge, particularly in **Colombia (28%)** and **Mexico (24%)**. Interestingly, **16%** of companies report facing **no significant barriers** to AI adoption, a stark contrast to Chile's low 6%.

COMPANIES POISED TO SUPERCHARGE AI STRATEGIES AND BUDGETS IN 2025

52% of surveyed decision-makers report expanding their AI implementation strategies, exploring new solutions and teams. **55%** plan to increase AI investment compared to 2024, with **Brazil** leading (**62%**). A significant **96%** of companies will train their teams in AI adoption this year, with Mexico leading (69%), followed by Chile (59%). AI proficiency is now a key hiring criterion for **94%** of companies in the region for 2025.



THANK
YOU!

