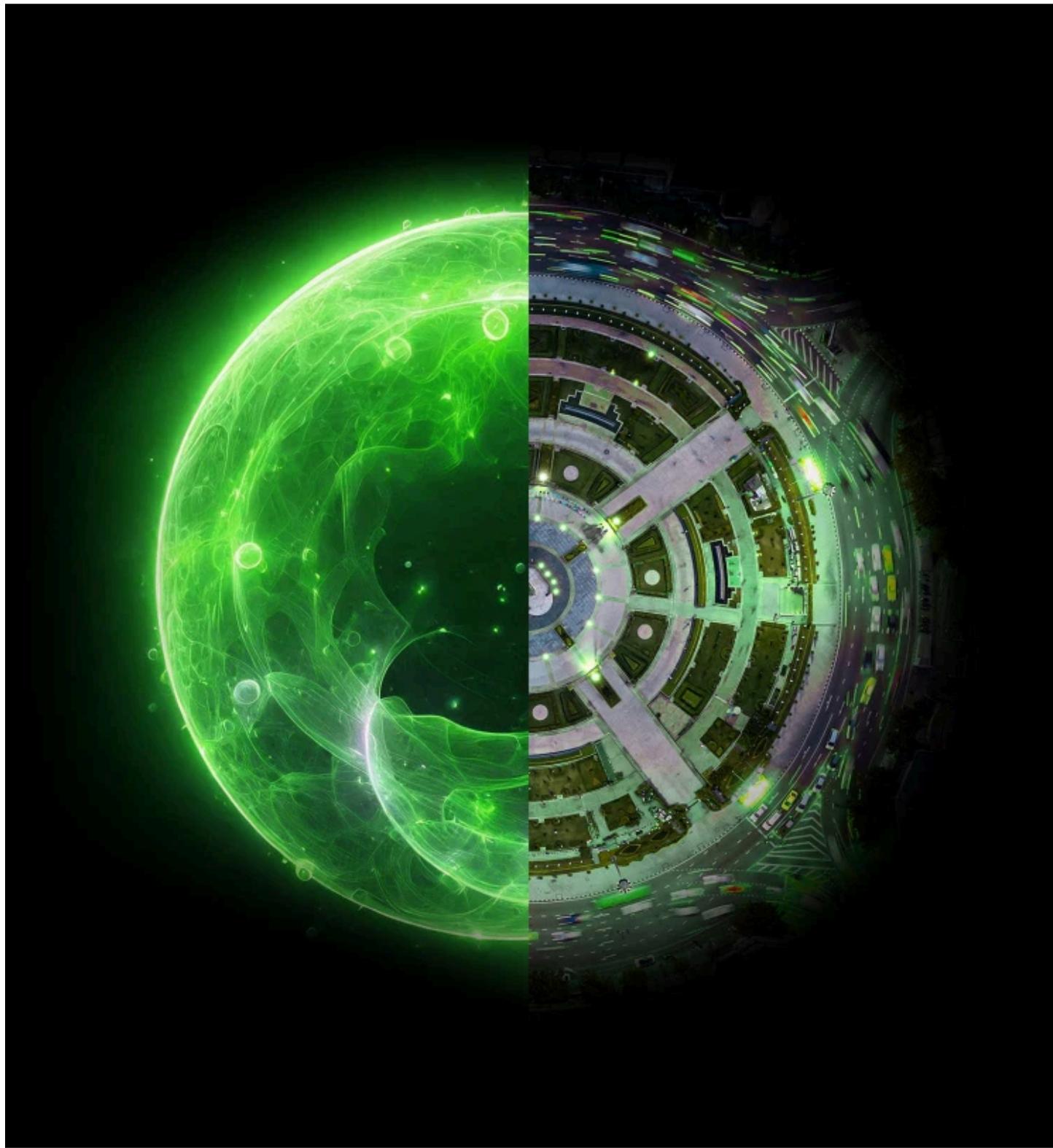


ARTIFICIAL INTELLIGENCE

The Widening AI Value Gap

Build for the Future 2025



Is your company AI-future built? Right now, 5% of firms worldwide are in this camp, while 35% are scaling AI, beginning to generate value. BCG's latest research provides empirical proof that AI future-built companies achieve five times the revenue increases and three times the cost reductions that other companies get from AI. The impact is sufficient to drive shareholder returns. But 60% companies are reaping hardly any material value, reporting minimal revenue and cost gains despite substantial investment.

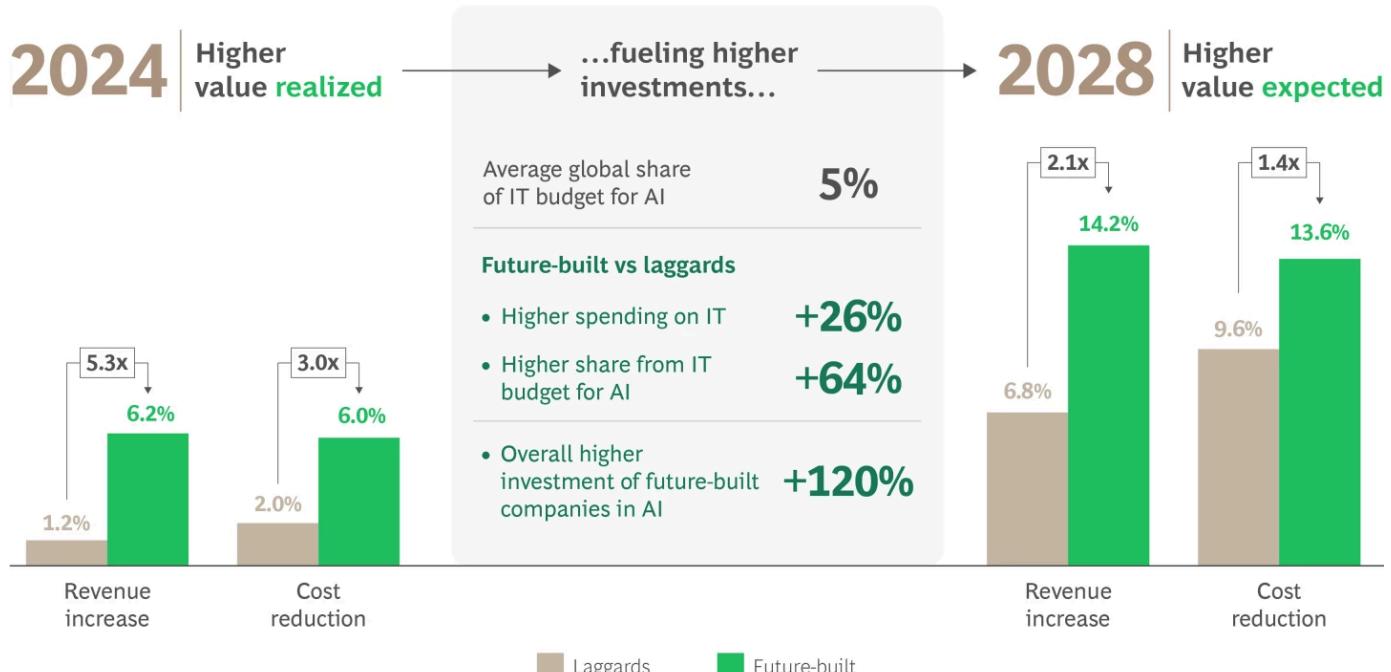
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Are You Generating Value from AI?

We call the 5% of value-generating companies future-built because they have put in place the critical capabilities they need to make AI work at the level of innovation and reinvention as well as to boost efficiencies. (See Exhibit 1.) Because they moved early, these businesses now enjoy outsized financial and operational benefits. They are achieving a transformative effect by catalyzing better decisions and more efficient and faster actions, targeting step changes that go far beyond what is possible from automation and productivity increases.

EXHIBIT 1

Future-Built Companies Create a Virtuous Cycle by Higher Spending on AI and Reinvestment of Gains from AI



Source: BCG Build for the Future 2025 Global Study (n = 1,250).

Note: Results reflect the business area respondents know best, not always the full company. Revenue increase and cost reduction are calculated as a percentage of annual revenue through AI efficiency gains in areas where AI is applied.

Read Chapter 1 on how future-built companies generate value.

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AI Value Generators Are Pulling Away

Future-built companies accelerate value creation by reinvesting their AI returns in stronger people and tech capabilities. They plan to spend 26% more on IT (representing almost a full percentage point of revenue) and dedicate up to 64% more of their IT budget to AI in 2025. As a result, they expect to see twice the revenue increase and 40% greater cost reductions in 2028 than laggards do in the areas where they apply AI.

The emergence of agentic AI is expanding the value gap between future-built and other firms. AI agents already account for about 17% of total AI value in 2025 and are expected to reach 29% by 2028. Future-built companies allocate 15% of their AI budgets to agents. A third of these companies use agents, compared with 12% of companies that are only scaling AI and almost none of the 60% that lag in adoption.

Read Chapter 2 on how future-built companies are pulling away.

What Value Generators Do Differently

The good news for all companies is that the playbook that future-built firms follow is clearly delineated and available to all. It's a roadmap that the other 95% can use to build AI maturity and achieve value at scale.

We first described this winning formula in our 2024 report, and the evidence this year suggests that companies should double down on it, since value creation clearly compounds for firms that focus on making the right moves.

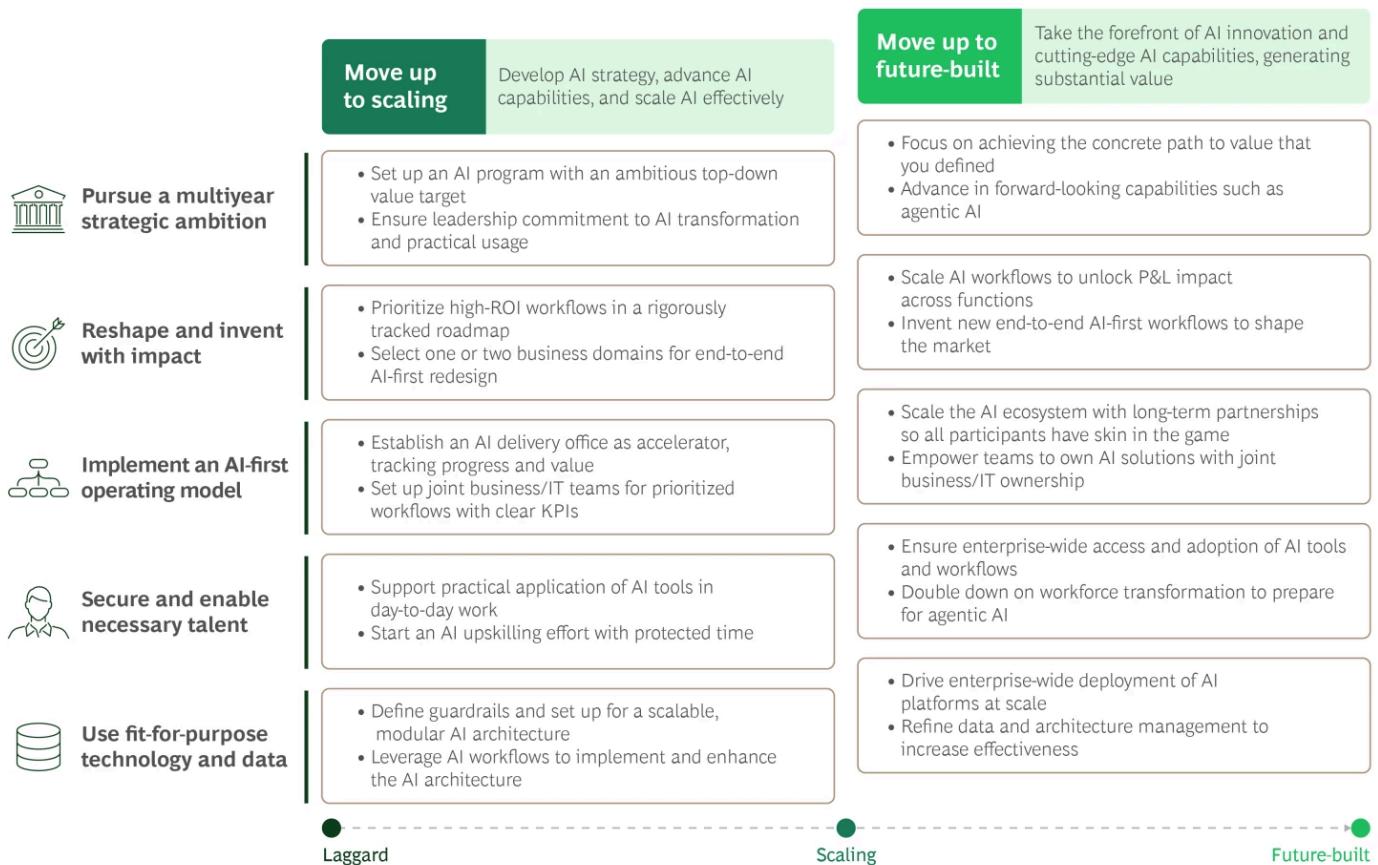
Read Chapter 3 on what future-built companies do differently.

How to Accelerate AI Value Creation

Each company will find its own path to value creation, depending on where it stands today. (See Exhibit 2.) Laggards can follow the playbook laid out by future-built leaders to move up the maturity curve, starting with a strong and bold commitment from top management and translate business objectives into an overarching vision and strategy. Companies that are already scaling AI initiatives should invest (and reinvest their gains) in forward-looking capabilities, such as agentic AI innovation.

EXHIBIT 2

The Future-Built Playbook for Climbing the AI Maturity Curve



Source: BCG analysis.

Read Chapter 4 on how you can accelerate value creation.

The most important point is that time is short. Future-built companies are pulling away, widening the value gap. Others need to move now.

Build for the Future x AI Quick Assessment

Take our two-minute Build for the Future x AI Quick Assessment to better understand your starting point on the journey along key capabilities.

Begin by indicating your company's sector. Throughout the assessment, select the score that most closely reflects where your company is today.

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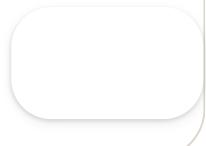
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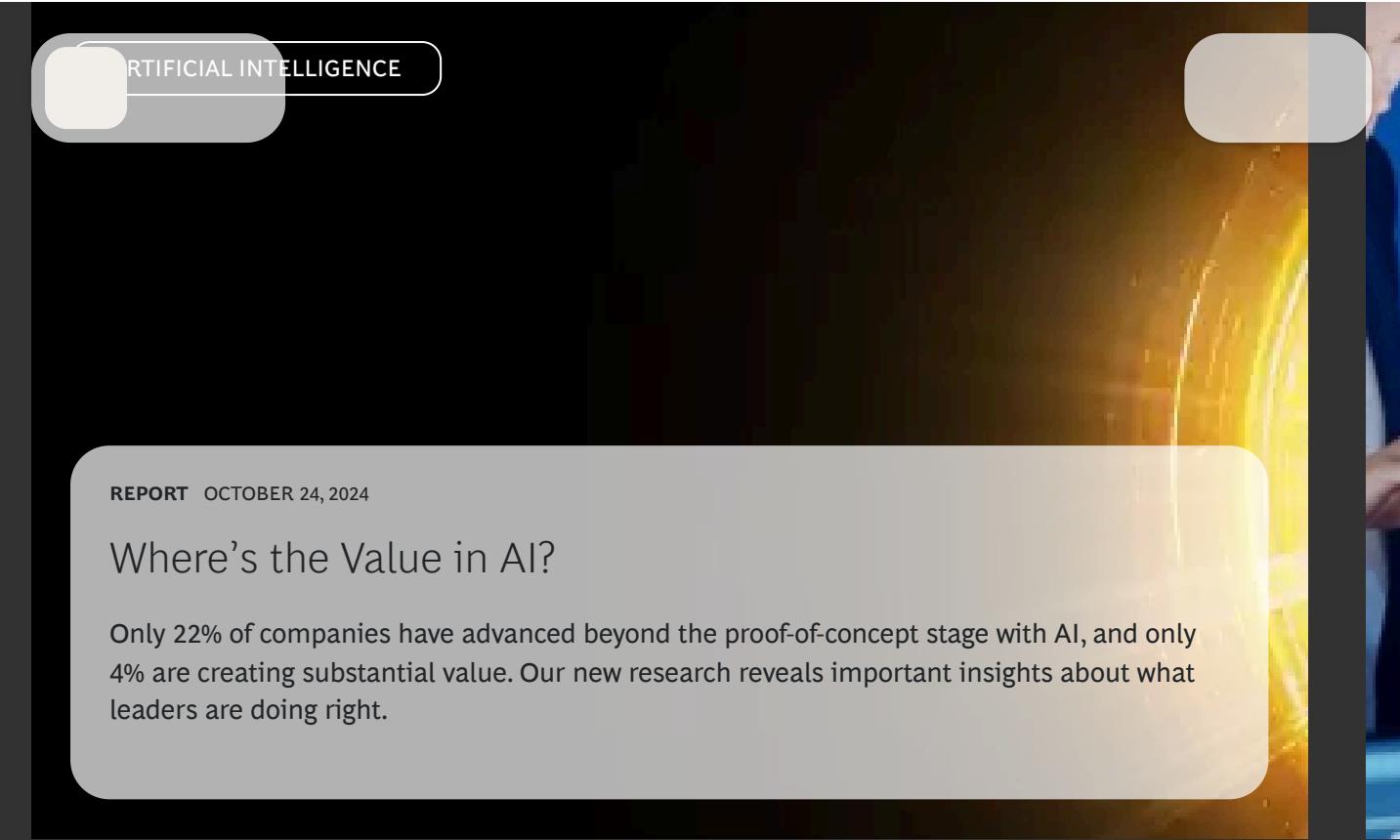
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REPORT OCTOBER 24, 2024

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Only 22% of companies have advanced beyond the proof-of-concept stage with AI, and only 4% are creating substantial value. Our new research reveals important insights about what leaders are doing right.



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