



GenAI, Future of Work, & Sustainability

Q4 2025 Survey Findings



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Executive Summary

OVERVIEW

- HPA's Economic and Business Outlook Survey was conducted from November 14-21, 2025 in conjunction with Eden McCallum, a European-based firm
- We surveyed 379 business leaders from across the globe, with a focus on the U.S., UK, and rest of world (RoW)
- Our sample respondents work across a broad range of industries within companies of varying sizes and ownership models

GENERATIVE AI

Current state and usage

- Most companies are still in the exploratory phase of using GenAI (~66%), experimenting with/piloting GenAI use cases, as well as observing what others in the industry are doing; one-third are developing or using proprietary tools, and fewer are implementing GenAI at scale (~20%)
- Marketing/communications (43%) and customer service (40%) are the top business functions using/piloting GenAI, with marketing/communications using it for content generation, personalization, and campaign optimization, while customer service utilizes GenAI-powered chatbots and virtual assistants
- Regarding talent, >50% of companies are training their existing staff, and nearly one-third are hiring new talent with relevant GenAI skills; employee fears around being replaced by GenAI are valid to some degree, as 12% of leaders stated that their company has replaced staff with AI agents

Impact

- Nearly 33% believe that GenAI is already (very) significantly impacting their business; with over 50% seeing that impact as positive, though 25% are mixed
- Business leaders reported the most value is being derived from cost reduction/efficiency improvement (50%), as well as enhanced decision making with better insights (37%) and improved customer and employee experience (32% and 28% respectively); only a few have seen direct impacts on revenue (10-12%)

Future state

- Looking forward, ~80% expect the impact of GenAI on their businesses to be (very) significant (up from ~33% now), a view shared consistently across regions
- Business leaders also expect large increases in value generation from GenAI in the next 1-3 years across all areas, particularly from improved customer experience, although cost reduction / efficiency is the top area where leaders expect to generate value

Executive Summary

WAYS OF WORKING

- Globally the hybrid model is the most common, with nearly 7 in 10 organizations taking this approach to office work; approximately 10% are fully office-based and just under 10% fully remote, with the remaining stating that their company's approach 'varies by team'
- More U.S. organizations have a policy requiring employees to be in the office full time compared to those in other regions (18% in the U.S. vs. 11% globally), and at the same time, more U.S. organizations are working remotely compared to the global average (13% vs. 7%)
- Business leaders spend an average of 2.8 days working in the office, which they report is right in line with their organization's policy; in RoW, however, business leaders spend more time in the office than their organization's policy requires (3.2 days vs. 2.9 days)
- Over two-thirds of leaders report being satisfied with their organization's current ways of working, particularly those who are fully remote or where approaches vary by team; leaders note remote work benefits such as flexibility and balance, while noting challenges for collaboration and connection
- Most (~60%) expect their company's approach to office working to remain unchanged over the next 1-3 years, although 36% expect more time in office

ENVIRONMENTAL SUSTAINABILITY

- Most business leaders globally (88%) are personally concerned about environmental sustainability to some extent, with 29% reporting they are 'very concerned'; in the U.S., concern is still high among business leaders, though slightly lower (81%) than the global average
- Despite the concern at the personal level, only 57% of global leaders are at companies that have a corporate sustainability plan with specific, time-bound targets; in the U.S., the number drops to 36%; leaders at companies that are publicly traded (vs. privately held) and/or large (>5,000 employees) are more likely to have a corporate sustainability plan
- Only 7% of U.S. leaders are optimistic about the U.S. achieving net-zero emissions by 2050, and 56% stated they were 'very pessimistic'; overall the U.S. was more pessimistic around net-zero targets than the UK and RoW, though these geographies were also quite pessimistic (only 12% were optimistic in the UK and 20% in RoW around achieving their targets)
- Though leaders are pessimistic about their country hitting its targets, nearly 70% of those with a corporate sustainability plan are optimistic about their company achieving its own targets, suggesting they view their own company's capabilities more favorably than those of their government's

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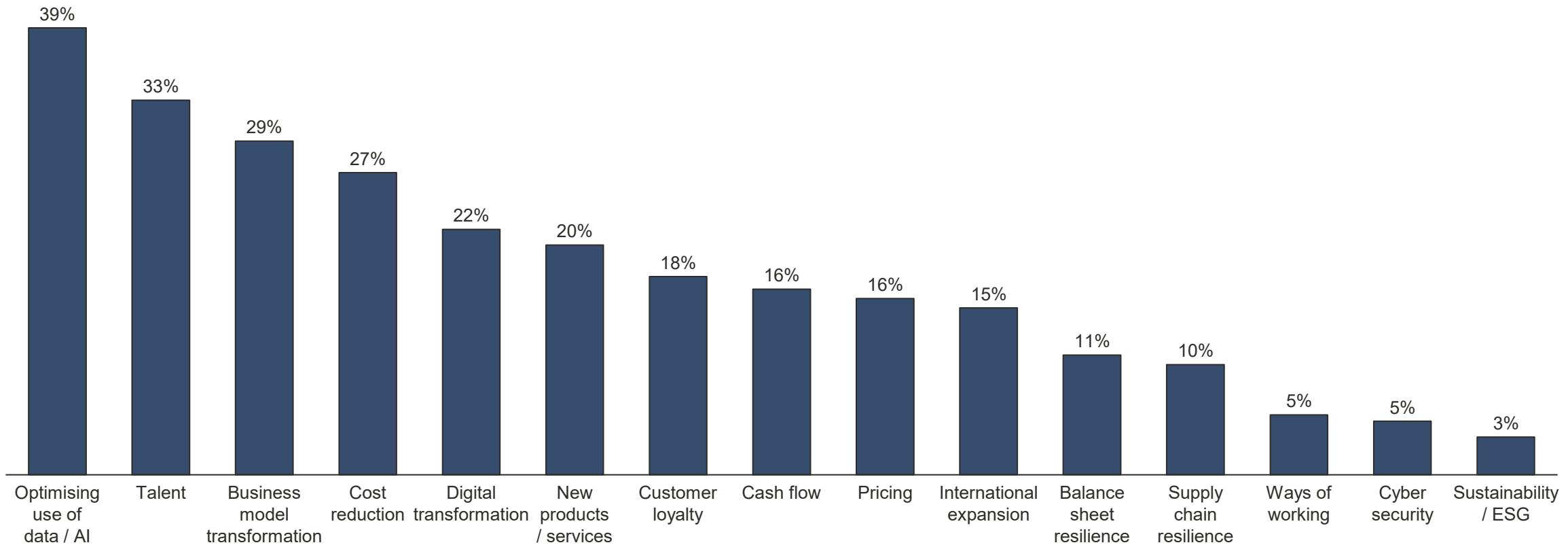
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Optimizing use of data and AI is the top internal issue along with talent and business model transformation

Most important internal issues for businesses (Q4 '25)



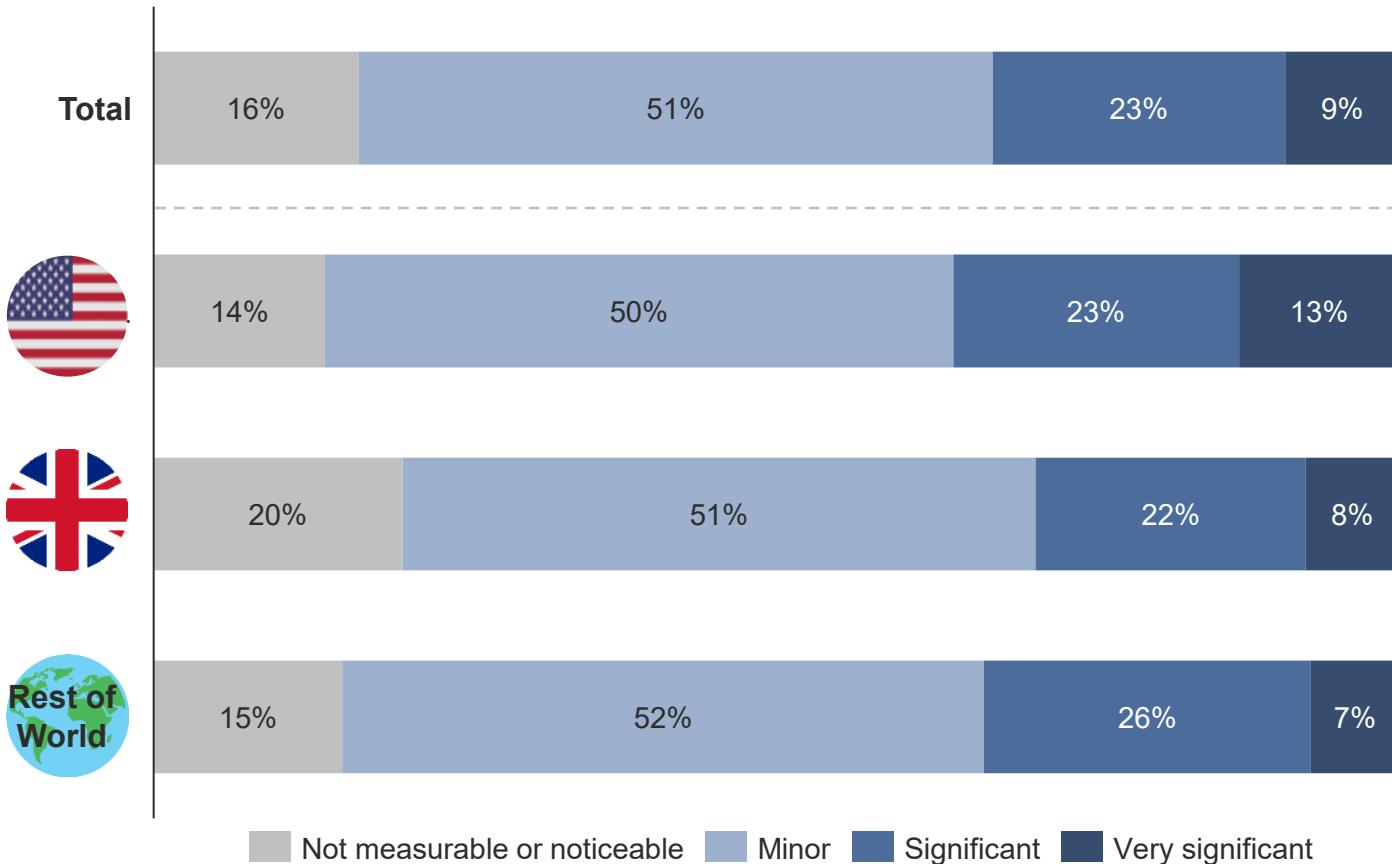
n: 360

Notes: Participants could select a maximum of 3 answers. Excludes those who answered 'Other' or 'Don't know'. Other (textbox) responses n:17, includes comments around expansion (e.g., domestic expansion, cost of growth), 5 business specific issues (e.g., product development, supply chain), business landscape (e.g., demand, availability of finance, market instability), and personnel issues (e.g., staffing)

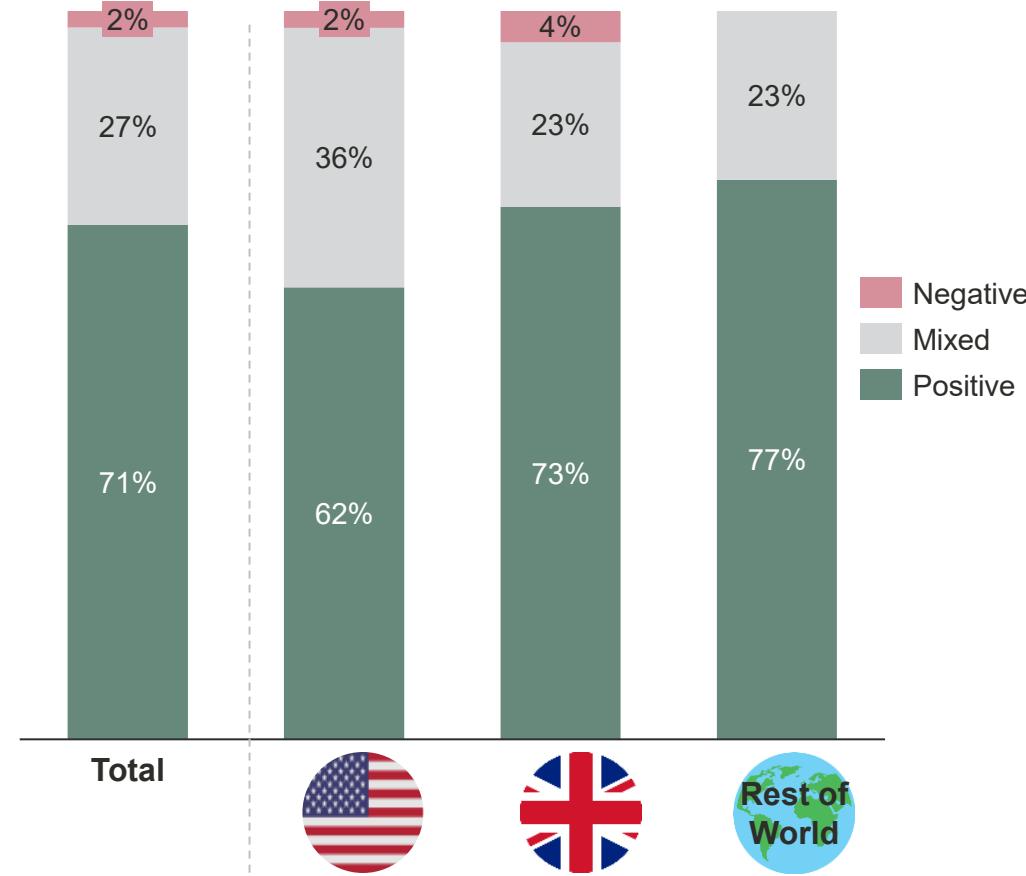
Source: HPA Business Outlook Survey: Q11 - What are the most important internal issues for your company over the next 1-2 years?

Nearly 33% of leaders say GenAI is significantly impacting their business, with over 70% stating that the impact has been positive

Extent of GenAI impact on business, by country (Q4 '25)



Sentiment around GenAI impact, by country (Q4 '25)



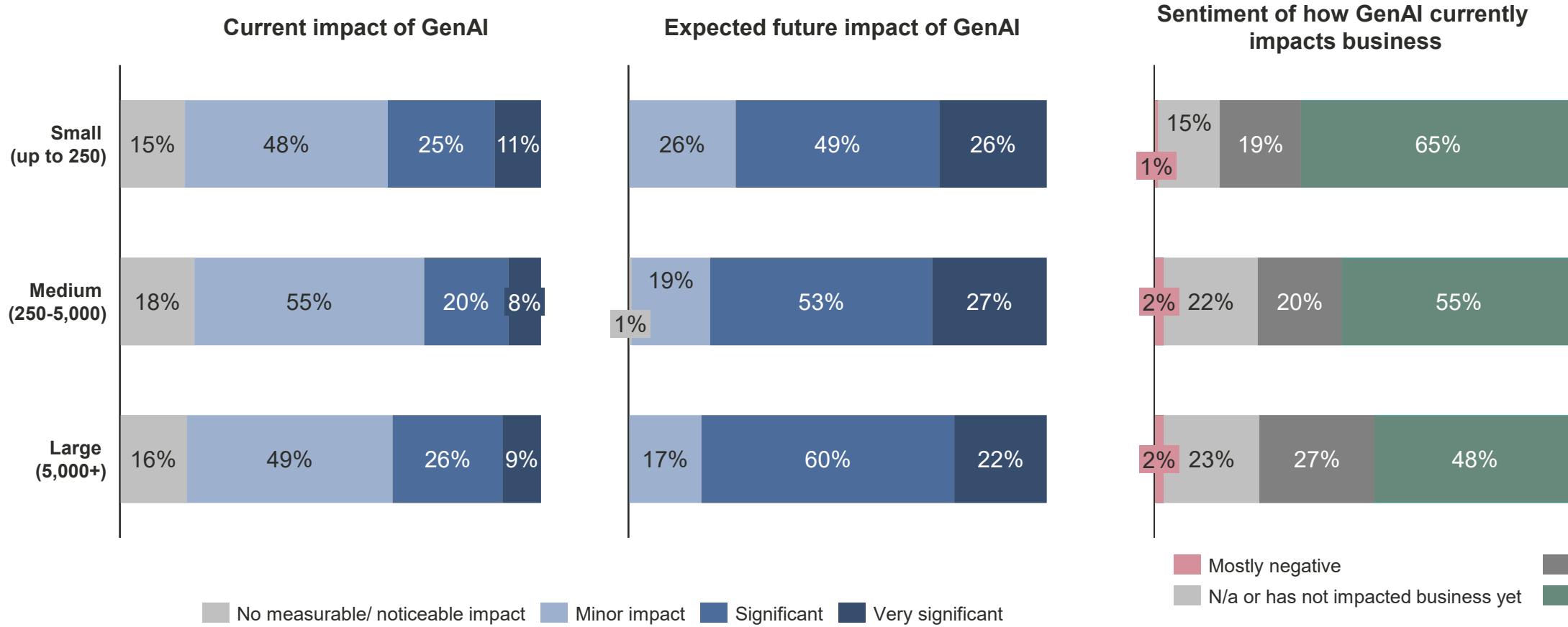
Total n: 329; U.S. n: 110; UK n: 120; RoW n: 99

Note: Excludes those who answered 'Don't know'.

Source: HPA Business Outlook Survey: Q18 - To what extent has generative AI impacted your business thus far?; Q19 - To the extent AI has impacted your business, has the impact been mostly positive, negative, or mixed?

While the current impact of GenAI is similar by size, in the future larger businesses expect greater impact; currently small businesses feel the most positive

Impact and sentiment of GenAI by company size (Q4 '25)



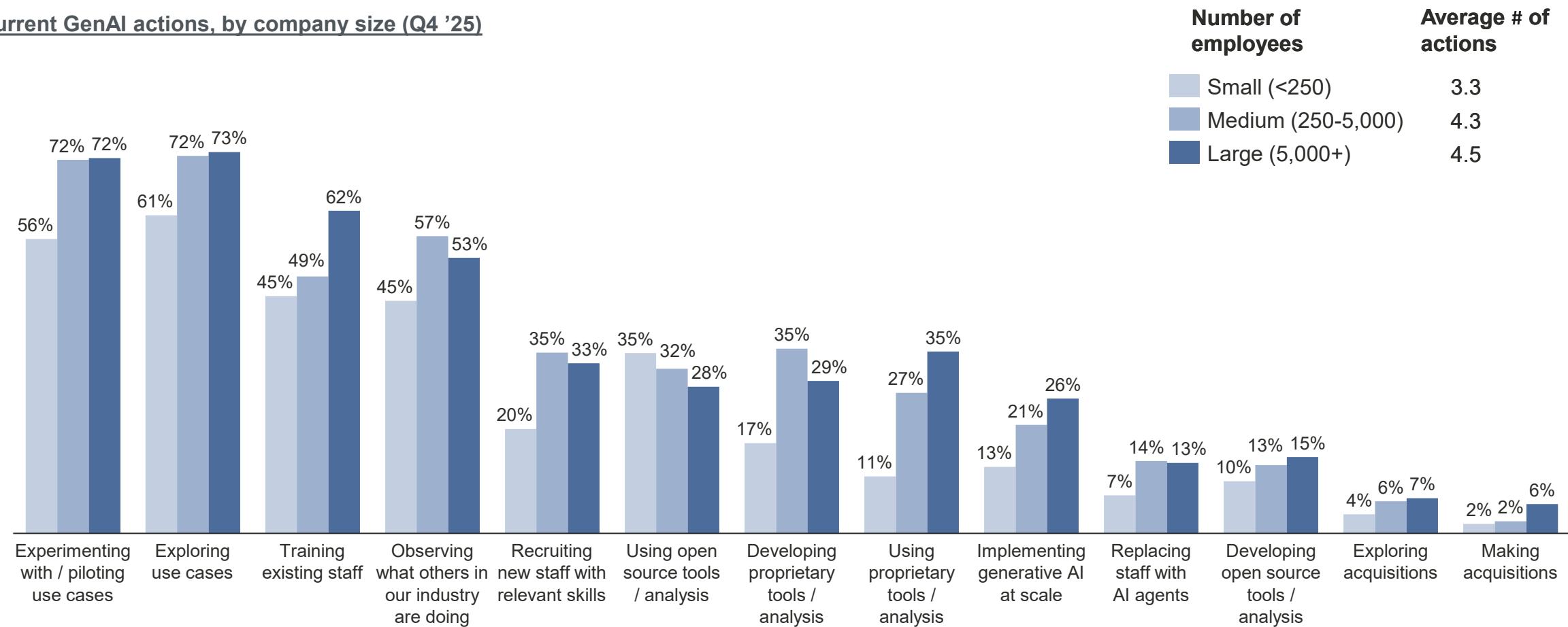
"This is the biggest disruption since the beginning of the internet; it allows small players such as ourselves to be as performant as the bigger players."

n: Overall 328; <250: 109; 250-5000:130; 5000+ :88

Source: HPA Business Outlook Survey Q2 – How many people does your company / organization employ in total? Q18 – To what extent has generative AI impacted your business thus far? Q19 – To the extent AI has impacted your business, has the impact been mostly positive, negative, or mixed ?

Perhaps not surprisingly, small companies are less likely to be undertaking GenAI actions of all types

Current GenAI actions, by company size (Q4 '25)



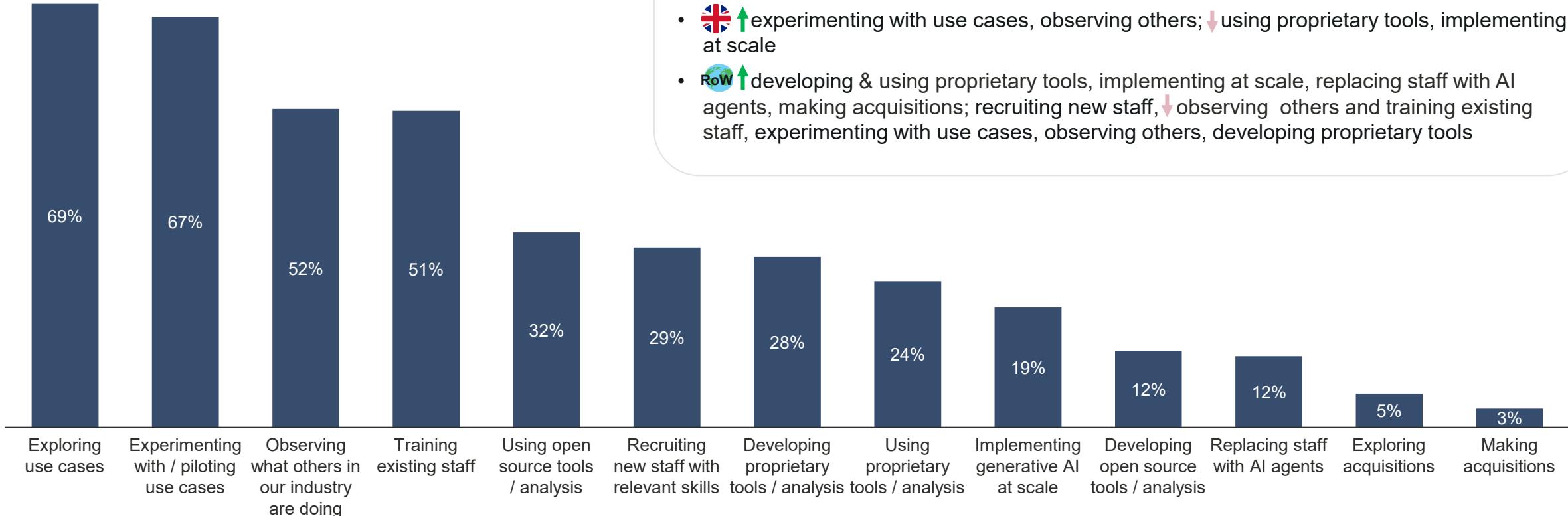
Q4 '25 n: <250: 110, 250-5000: 130; 5000+: 89

Notes: Don't know and Other responses are excluded. Respondents could select all that apply; hence percentages do not add to 100%.

Source: HPA Business Outlook Survey Q20 - What is your company currently doing about / with generative AI? Please select all that apply. Q2 – How many people does your company / organization employ in total?

Two-thirds of businesses are currently exploring and experimenting with GenAI use cases

Current GenAI actions (Q4 '25)



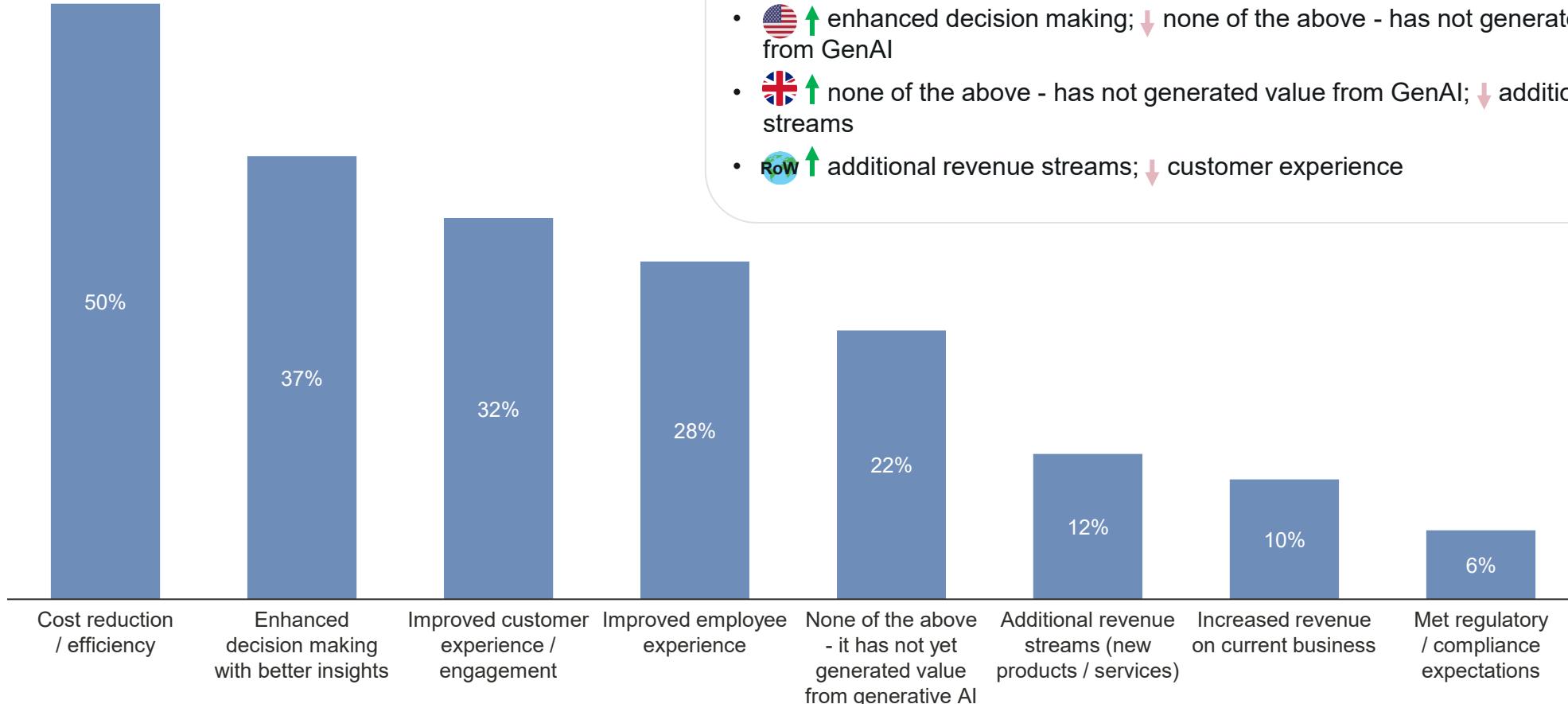
n: 329 (average of 4.0 actions per respondent)

Note: Excludes those who answered 'Don't know' and 'Other'. Respondents could select all that apply; hence percentages do not add to 100%.

Source: HPA Business Outlook Survey: Q20 - What is your company currently doing about / with generative AI?

GenAI value creation is emerging, led by cost reduction / efficiency gains and better decision-making

Value generated from GenAI (Q4 '25)



Generally high consistency in value generated by cost reduction, decision making, and customer experience by country, with similar rankings - but slight differences including:

- enhanced decision making; none of the above - has not generated value from GenAI
- none of the above - has not generated value from GenAI; additional revenue streams
- additional revenue streams; customer experience

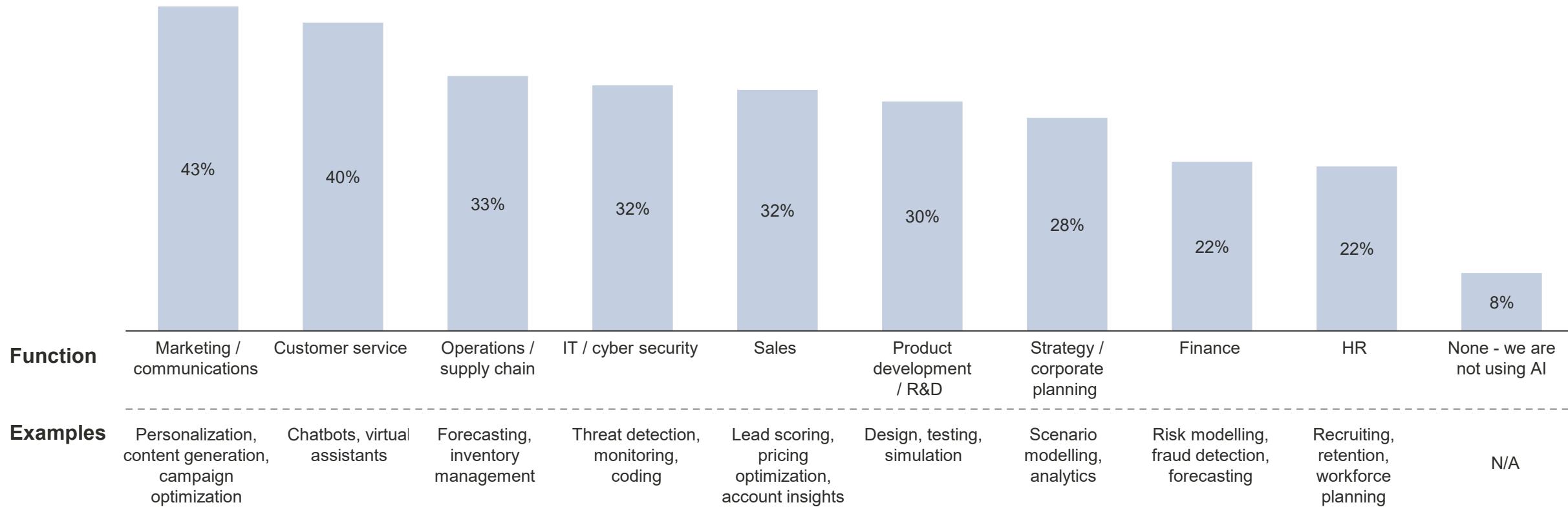
n: 329

Note: Excludes those who answered 'Don't know' or 'Other'.

Source: HPA Business Outlook Survey: Q21 - How has your company generated value from generative AI thus far?

GenAI adoption is highest in marketing and customer service, with operations close behind

Business functions currently using GenAI (Q4 '25)



U.S. n: 110; UK n: 120; RoW n: 99

Note: Excludes those who answered 'Don't know' or 'Other'. Respondents could select all that apply; hence percentages do not add to 100%.

Source: HPA Business Outlook Survey: Q22 - In which business functions are you currently using or piloting AI?

While the top 6 business functions using GenAI are similar across geographies, customer service, operations and sales have notably different rankings / usage

Business functions currently using GenAI, by country (Q4 '25)

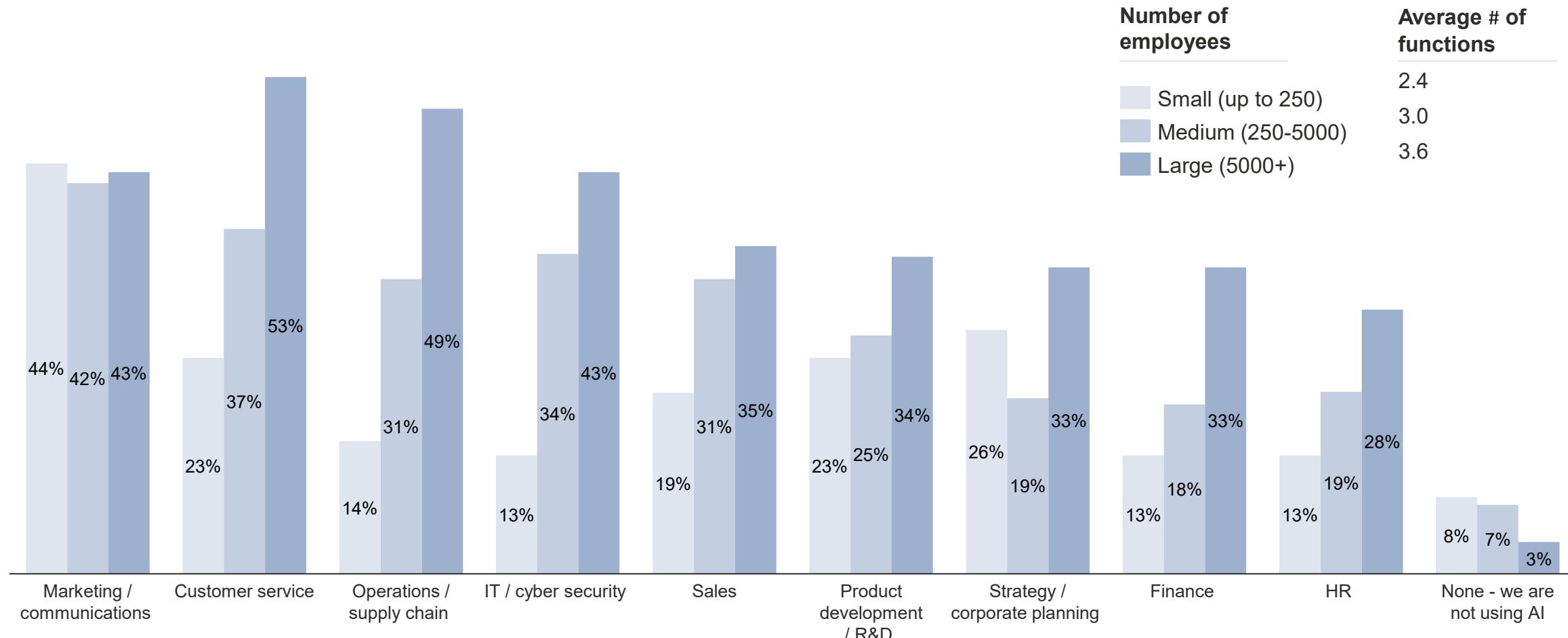
THE UNITED STATES	THE UNITED KINGDOM	REST OF WORLD
 Customer service 47%	 Marketing / communications 41%	 Marketing / communications 44%
 Marketing / communications 43%	 Customer service 39%	 Sales 41%
 Strategy / corporate planning 36%	 Operations / supply chain 31%	 Operations / supply chain 40%
 IT / Cyber security 35%	 IT / Cyber security 30%	
 Operations / supply chain 30%	 Product development / R&D 27%	 Customer Service 34%
 Product development / R&D 30%	 Sales 25%	 Product Development / R&D 34%
		 IT / Cyber Security 32%

U.S. n:110; UK n:120; RoW n:99

Note: Excludes those who answered 'Don't know' or 'Other'. Respondents could select all that apply; hence percentages do not add to 100%.
Source: HPA Business Outlook Survey: Q22 - In which business functions are you currently using or piloting AI?

Large businesses are using GenAI more across all business functions; Marketing/Comms has the most common usage across company size

Business functions currently using GenAI, by company size (Q4 '25)



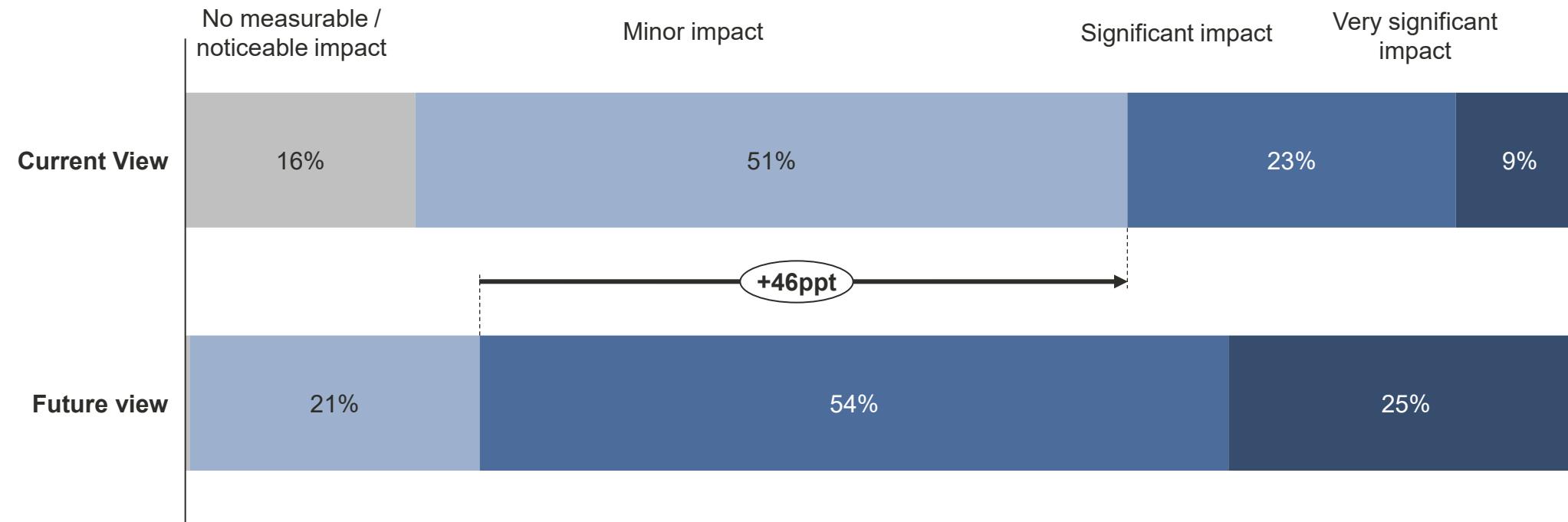
n: <250: 110, 250-5000: 130; 5000+: 89

Note: 1) Respondents could select all that apply, hence percentages do not add to 100, and don't know responses are excluded

Source: HPA Business Outlook Survey, Q22 – In which business functions are you currently using or piloting AI? [Please select all that apply] Q2 – How many people does your company / . employ in total?

Looking forward, leaders expect the impact of GenAI to significantly increase in the future

Impact of GenAI on organization – current vs future (next 1-3 years) view (Q4 '25)



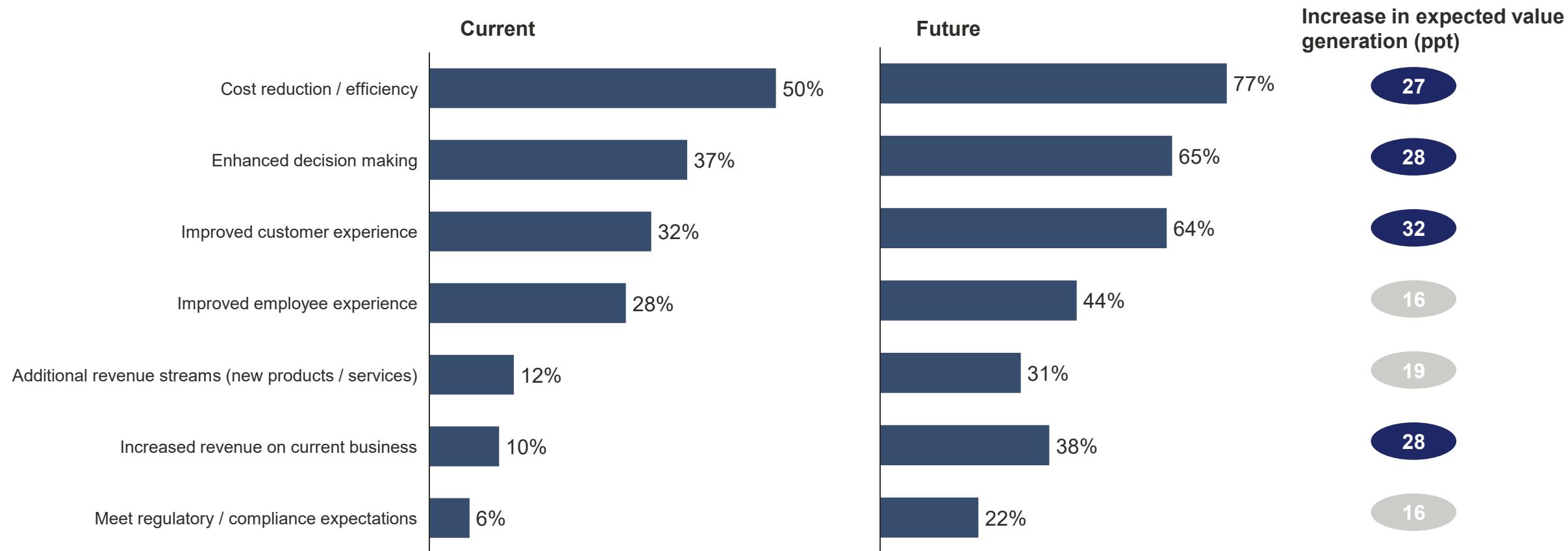
Q4 '25 n: 323

Notes: Don't know responses are excluded

Source: HPA Business Outlook Survey Q18 – To what extent has generative AI impacted your business thus far? Q23 - Now looking to the future, to what extent do you expect generative AI to impact your business / organization in the future (next 1-3 years)?

Business leaders expect large increases in value generation from GenAI in the next few years, particularly on improved customer experience

Current vs future (next 1-3 years) expected value generation from GenAI (Q4 '25)



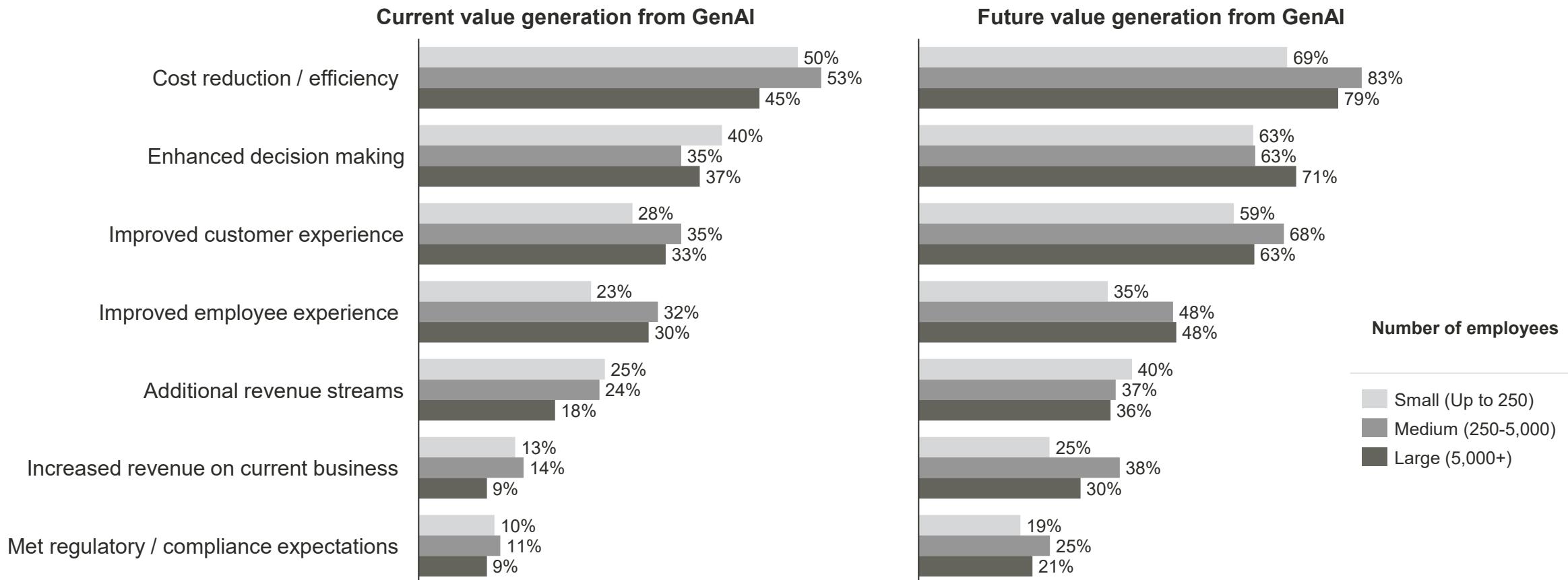
n: 329

Note: 1) Respondents could select all that apply, hence percentages do not add to 100, and don't know responses are excluded

Source: HPA Business Outlook Survey Q21 – How has your company generated value from generative AI thus far? [Please select all that apply]. Q24 - Still thinking about the future, how does your company expect to generate additional value from generative AI in the next 1-3 years? [Please select all that apply]

Despite different levels of activity with GenAI, companies across the board are experiencing/expecting relatively similar levels of impact

Current and future GenAI value generation, by number of employees (Q4 '25)



<250 n: 110, 250-5000 n: 130; 5000+ n: 89

Note: Excludes those who answered 'Don't know'. Respondents could select all that apply; hence percentages do not add to 100%.

Source: HPA Business Outlook Survey: Q21 - How has your company generated value from generative AI thus far?; Q24 - Thinking about the future, how does your company expect to generate additional value from generative AI in the next 1-3 years?

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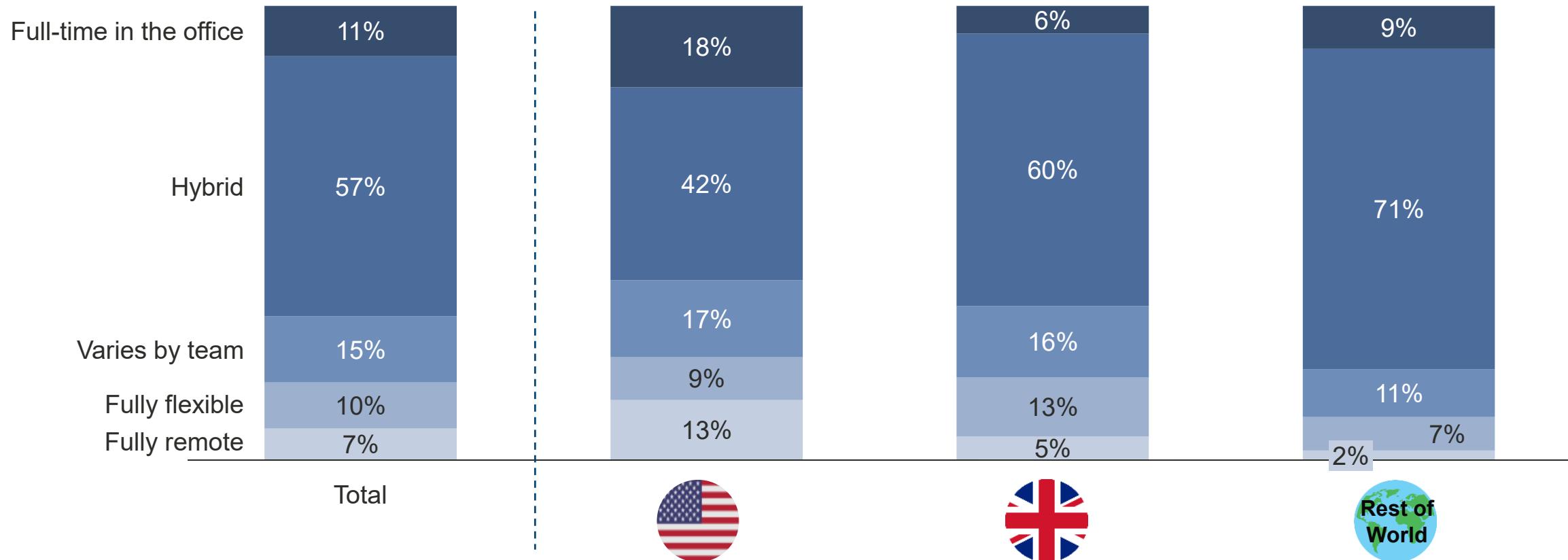
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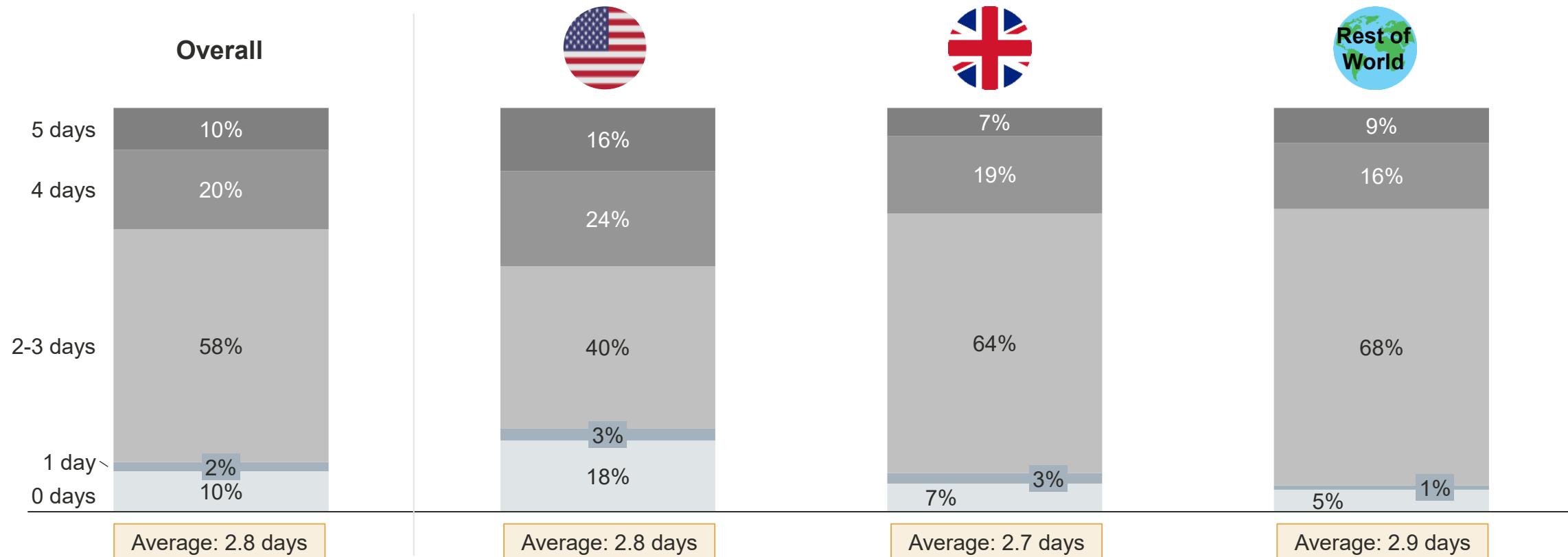
Globally most companies have a hybrid work policy in place; the U.S. reports having more companies at the two extremes: fully remote and full-time in the office

Average days per week office reporters are expected to be in office, by country (Q4 '25)



Nearly 40% of U.S. office workers have an in-office policy of 4-5 days per week, compared to 20-30% in the UK and the rest of the world

Organizational policy on office working, by country (Q4 '25)



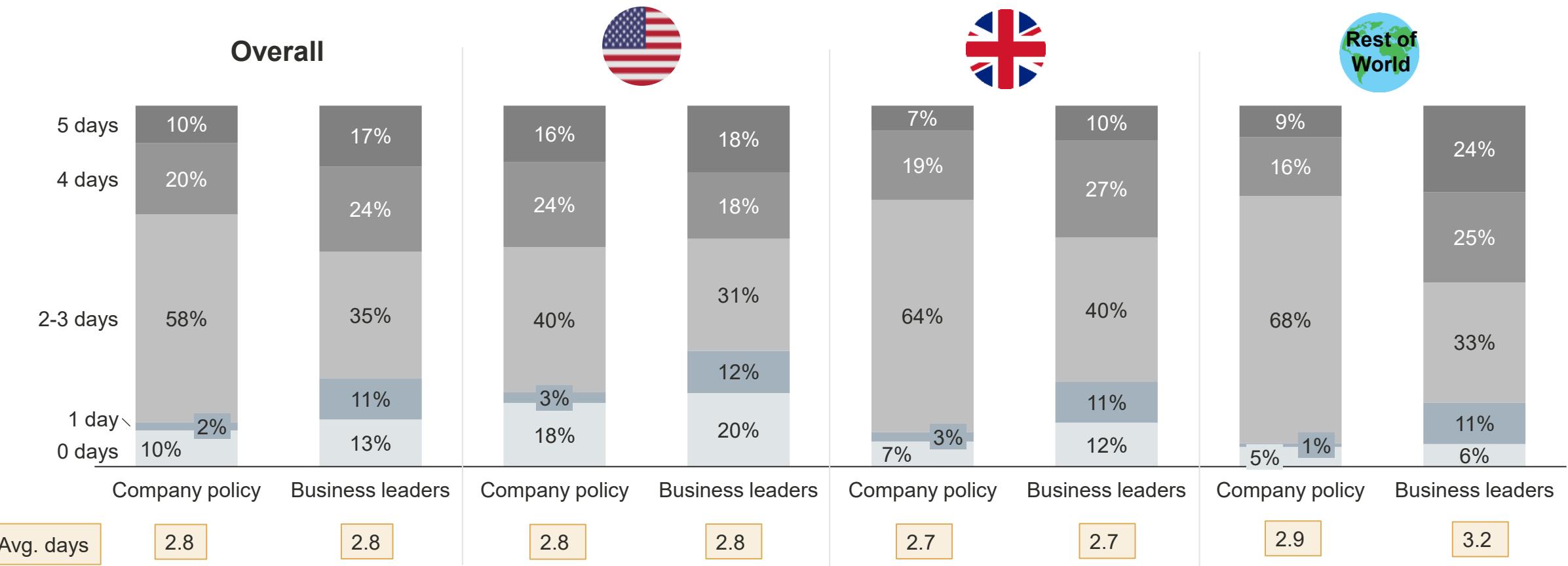
Total n: 316; U.S. n: 102; UK n: 115; RoW n: 92

Note: Includes respondents who said 1, 0-1, and 1-2 days; Includes respondents who said 2, 3 and 2-3 days; Includes respondents who said 4, and 3-4 days; Includes respondents who said 5, and 4-5 days. Responses noted as very variable depending on season or level of seniority were excluded. Excludes those who answered 'Don't know'.

Source: HPA Business Outlook Survey: Q31 - On average, how many days per week are your company's office workers currently expected to be in the office?

While most organizations' office working expectations are for 2-3 days per week in the office, business leaders' actual time in the office is more bifurcated

Company policy (expected days per week in office) vs. business leaders' days in the office, by country (Q4 '25)



Company policy total n: 309; U.S. n: 102; UK n: 115; ROW n: 92; Business leaders total n: 314; U.S. n: 103; UK n: 115; Row n:96

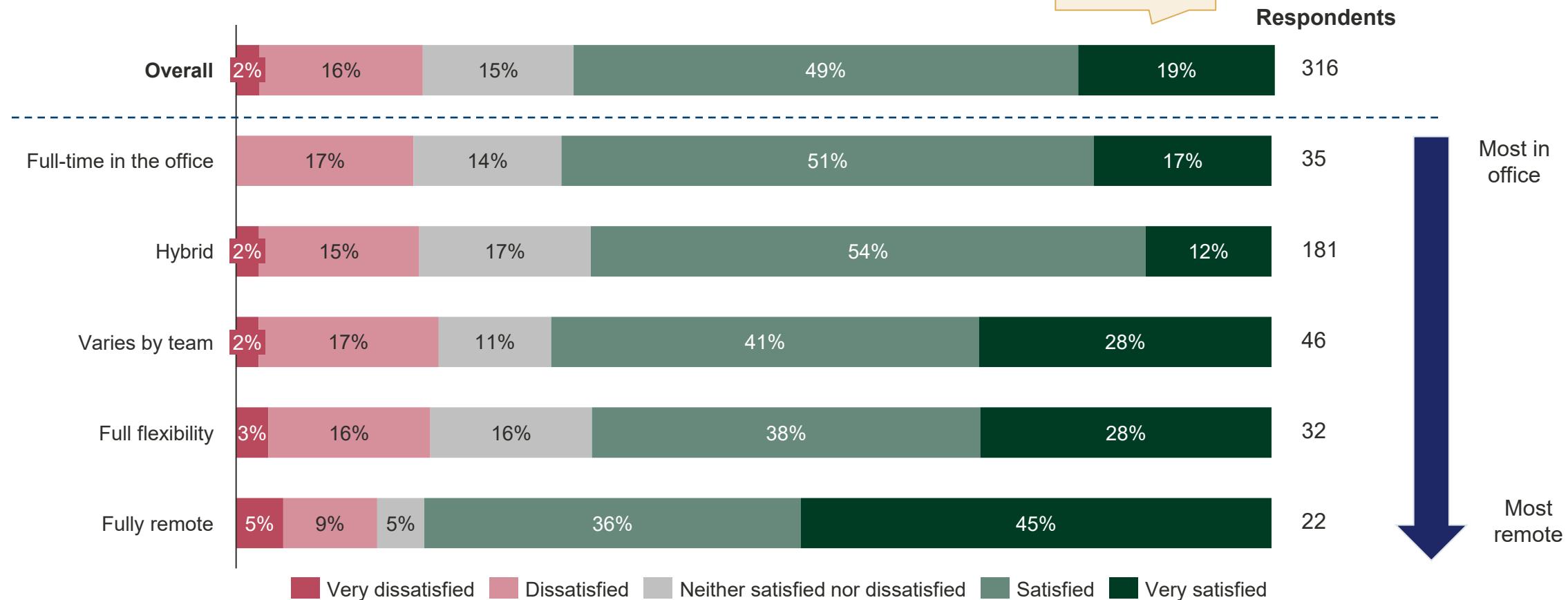
Note: Includes respondents who said 1, 0-1, and 1-2 days; Includes respondents who said 2, 3 and 2-3 days; Includes respondents who said 4, and 3-4 days; Includes respondents who said 5, and 4-5 days. Responses noted as very variable depending on season or level of seniority were excluded. Excludes those who answered 'Don't know'.

Source: HPA Business Outlook Survey: Q31 - On average, how many days per week are your company's office workers currently expected to be in the office?; Q35 - Lastly, on average, how many days per week do you personally spend in the office?

Over two-thirds of business leaders are satisfied with their organization's current ways of working

Business leaders' satisfaction with their company's approach to ways of working (Q4 '25)

The trend is similar across geographies



Total n: 316

Note: Small sample size for some categories: Full time in office: 35; Hybrid: 181; Varies by team: 46; Full flexibility: 32; Fully remote: 22. Excludes those who answered 'Don't know' or 'Other'.

Source: HPA Business Outlook Survey: Q30 - Thinking now about Ways of Working, and focusing on your company's office workers, which best describes your organization's current approach?; Q32 - As a business leader, how satisfied/dissatisfied are you with your company/organization's current approach?

Balance and flexibility underpin business leaders' satisfaction for flexibility/remote working, while collaboration and teamwork remain the key sources of friction

Key reasons for business leaders' satisfaction/dissatisfaction with current ways of working (Q4 '25)

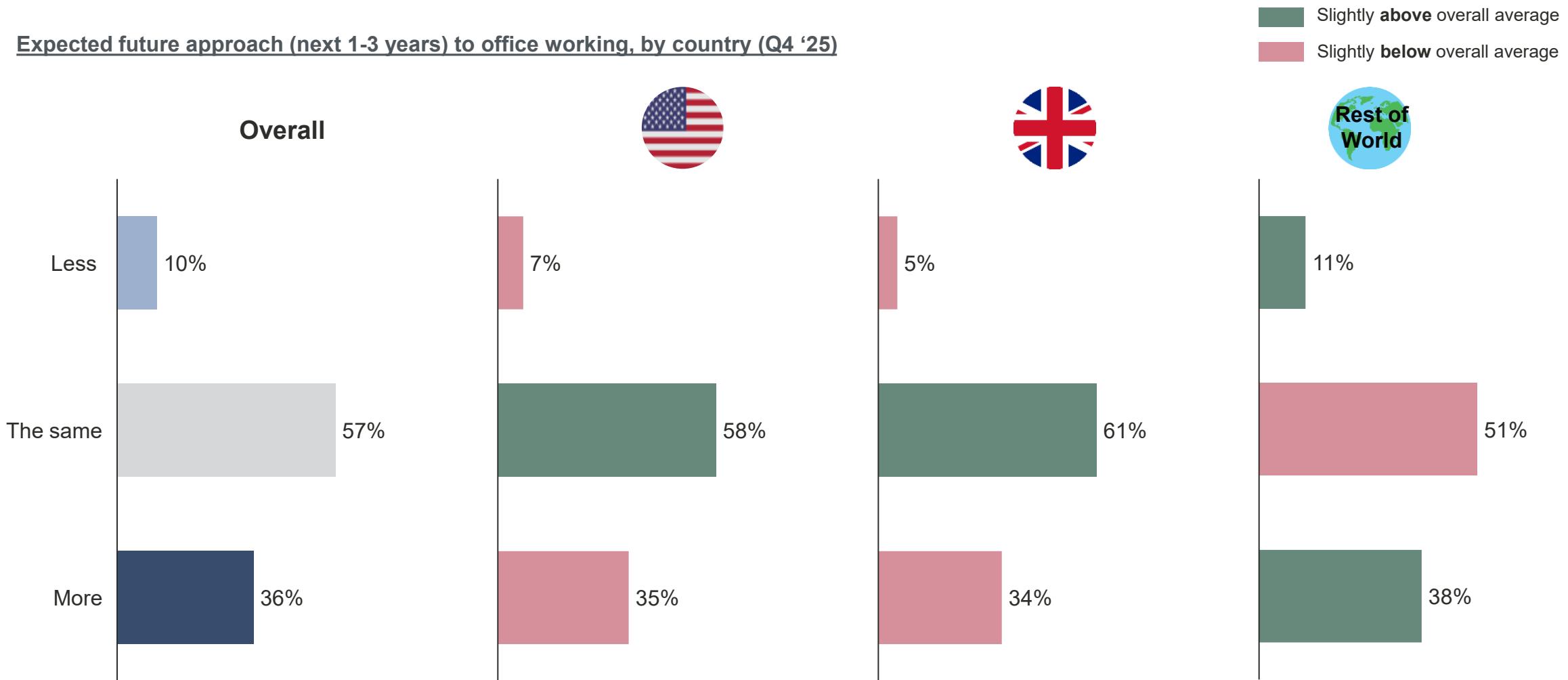
Full time in office	Hybrid - set days/ flexible	Fully remote
<ul style="list-style-type: none"> Collaboration & coordination "Face to face interaction is essential" "We need to coordinate constantly" Productivity & execution "Boosts productivity and collaboration" "Projects are executed and completed at a significantly higher level" Culture & focus "Team dynamic is much more strategic and focused" 	<ul style="list-style-type: none"> Balance between flexibility and coordination "Attracts top talent and provides flexibility. Balance between coordination and flexibility" Wider talent pool "The flexibility allows us to recruit from a wider pool" Culture, learning & norms (when office time is used well) "In-office time allows collaboration, learning and a way to embed new cultural norms" Digital collaboration is 'good enough' for some "We get enough teamwork and collaboration through Zoom and Teams" 	<ul style="list-style-type: none"> Flexibility & satisfaction "Provides great flexibility" "Enhances personal satisfaction"
<ul style="list-style-type: none"> Cost & rigidity "Forced to meet regulatory requirements at great cost... no investment return" (UK) "Limited flexibility post-Covid for the normal happenings in life" 	<ul style="list-style-type: none"> Communication inefficiency "Too many emails to replace in-person comms which remain vital" Lack of synchronization "Need to spend more (synchronized) time in the office for collaboration" Execution, teamwork & morale concerns "Concerns about productivity, client engagement skills, teamwork and overall morale" Hybrid without clarity underperforms "It works but we could optimize communications" 	<ul style="list-style-type: none"> Productivity & collaboration "Remote workers are less productive" "Working in silos, complete lack of collaboration" Learning & idea generation "Office presence needs to be mandatory for skill sharing, development and idea generating"

n: 104

Source: HPA Business Outlook Survey: Q30 - Thinking now about Ways of Working, and focusing on your company's office workers, which best describes your organization's current approach?; Q32 - As a business leader, how satisfied/dissatisfied are you with your company/organization's current approach?; Q33 - Why?

Those outside the U.S. and UK are more likely on average to expect more days in the office in future

Expected future approach (next 1-3 years) to office working, by country (Q4 '25)



Total n: 309; U.S. n: 103, UK n: 114; RoW n: 92

Note: Excludes those who answered 'Don't know'.

Source: HPA Business Outlook Survey: Q34 - Thinking now about the future (next 1-3 years), how do you expect your organization's approach to office working to evolve?

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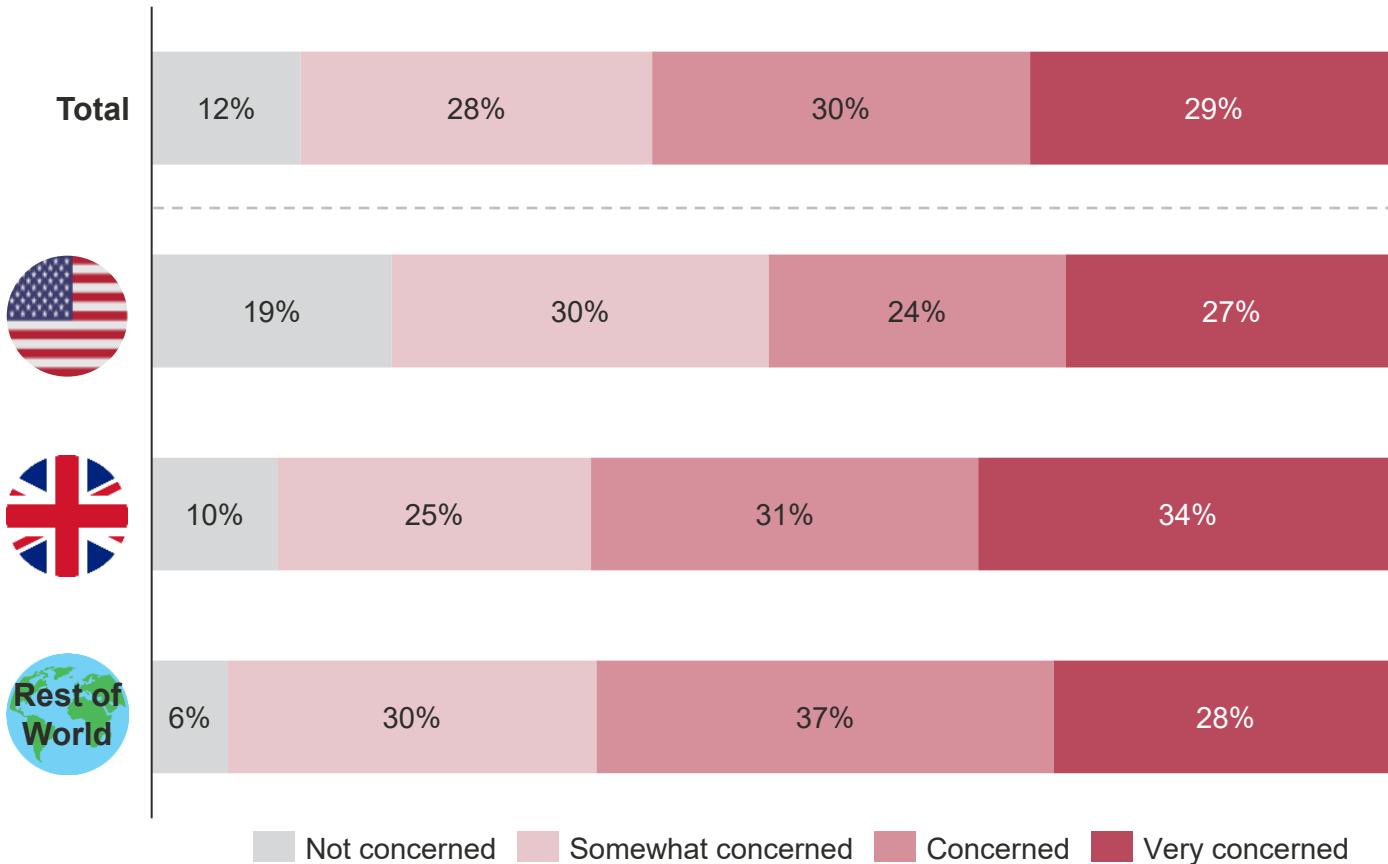
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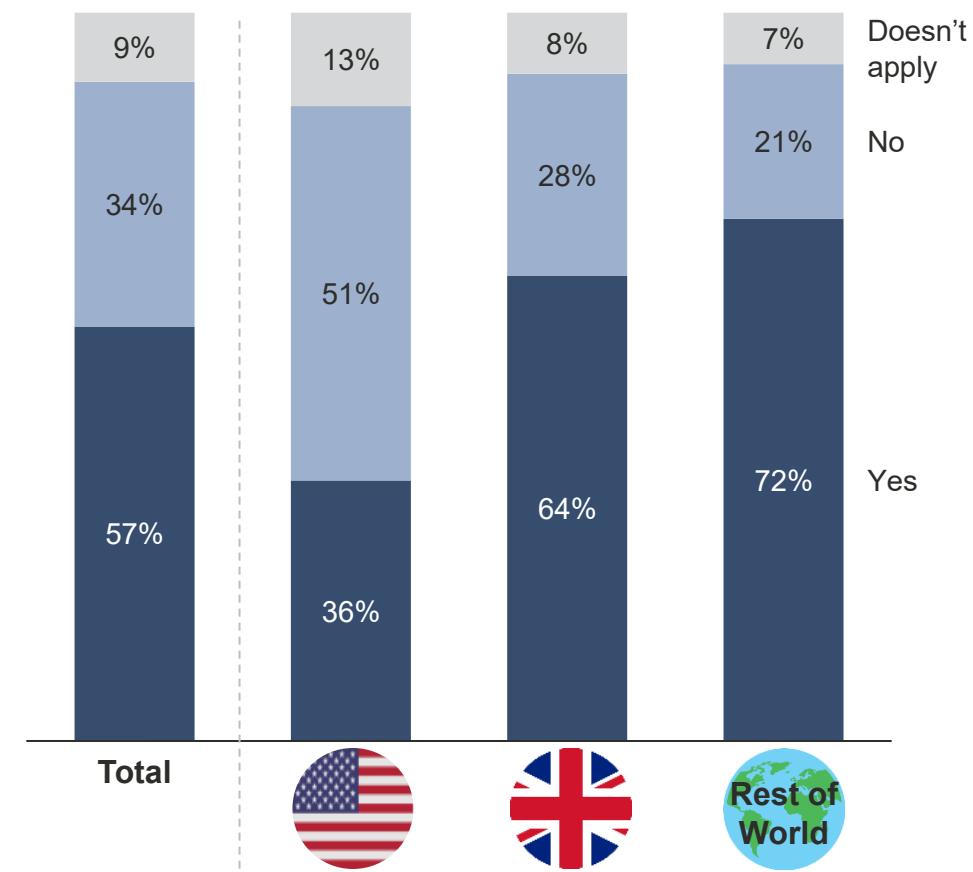


U.S. leaders are generally concerned about sustainability; however, most U.S. companies do not have a sustainability plan with specific time-bound targets

Personal concern about environmental sustainability, by country (Q4 '25)



Corporate sustainability plan with targets, by country (Q4 '25)



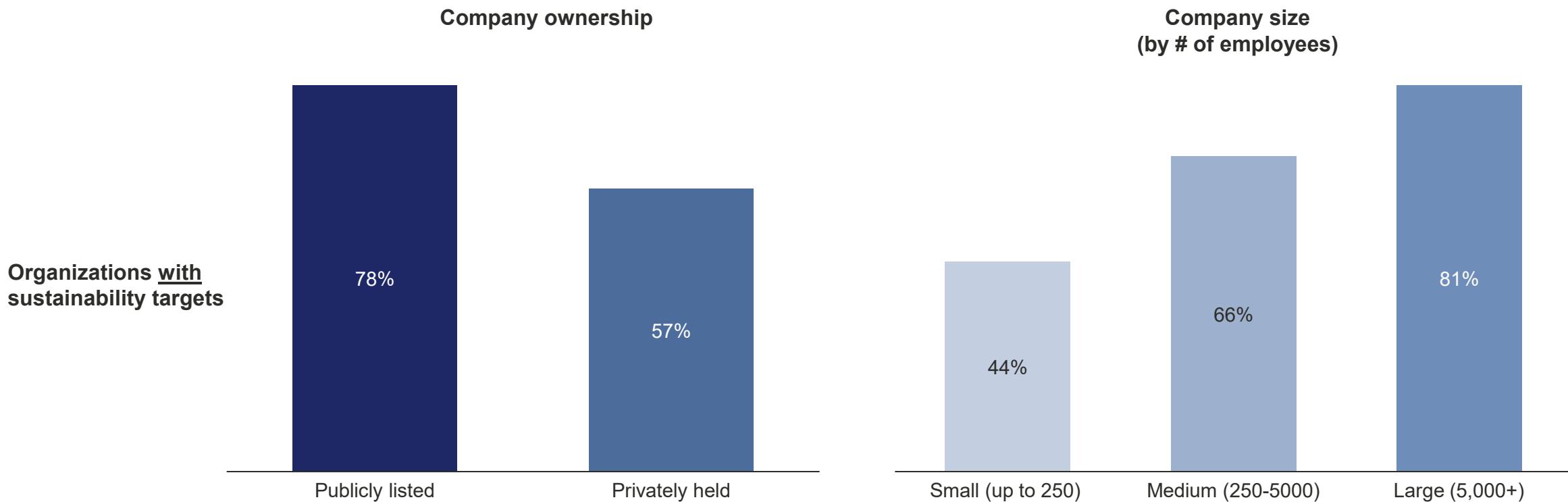
U.S. n: 109; UK n: 119; RoW n: 99

Note: Excludes those who answered 'Don't know', 'Not applicable', and those who do not expect to take any action in the previous question.

Source: HPA Business Outlook Survey: Q26 - How concerned are you personally about environmental sustainability?; Q28 - Does your organization have an environmental sustainability plan with specific, time-bound targets?

Globally, a greater proportion of publicly listed companies and large companies (>5,000 employees) have sustainability plans with specific, time-bound targets

Percent of organizations with corporate environmental sustainability plans with specific, time-bound targets, by company ownership and size (Q4 '25).



Publicly listed n: 89, Private n: 182; Company size by number of employees: up to 250 n: 110, 250-5000 n: 128, 5000+ n: 89

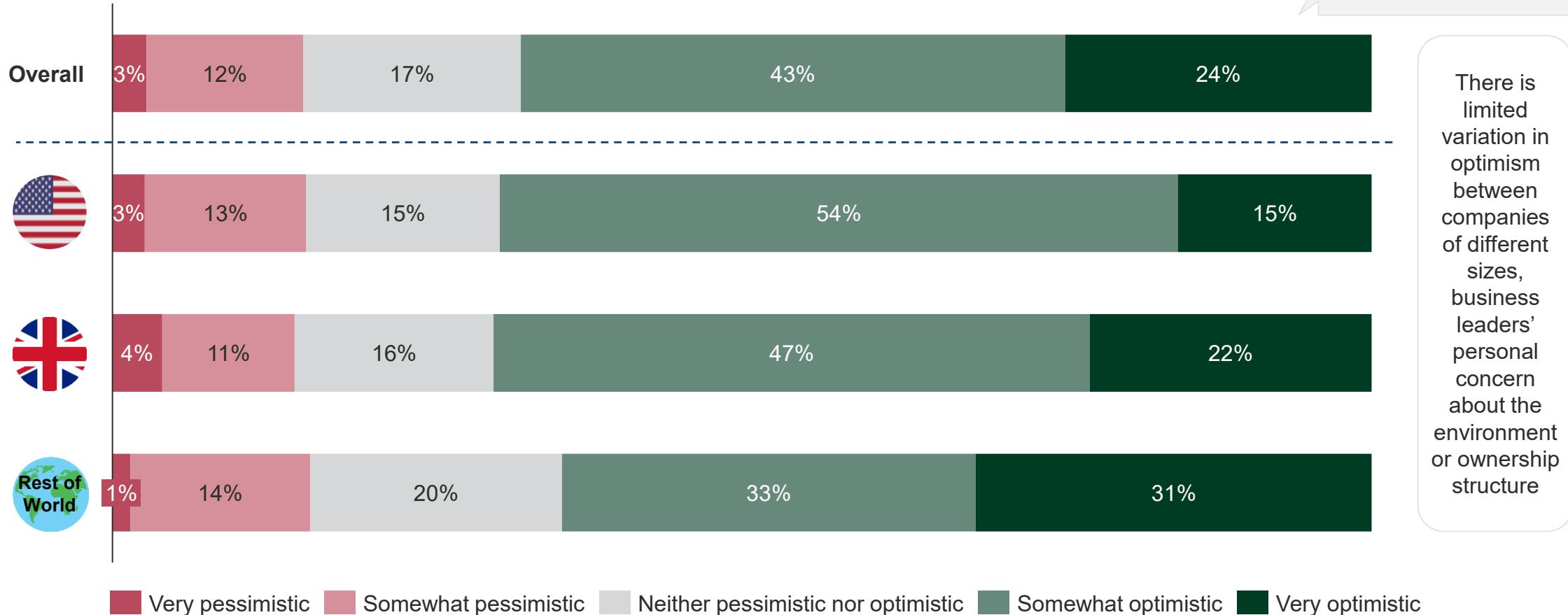
Note: Ownership split excludes those who answered Partnership, Government and NGO; Number of employees split excludes those who answered 'Don't Know'.

Source: HPA Business Outlook Survey: Q28 - Does your organization have an environmental sustainability plan with specific, time-bound targets?

For those with a plan, nearly 70% of respondents are optimistic about their organization achieving their environmental targets (with slightly fewer in the U.S.)

Sentiment around company achieving its specific, time-bound environmental targets, by country (Q4 '25)

Excludes those who do not have a sustainability target



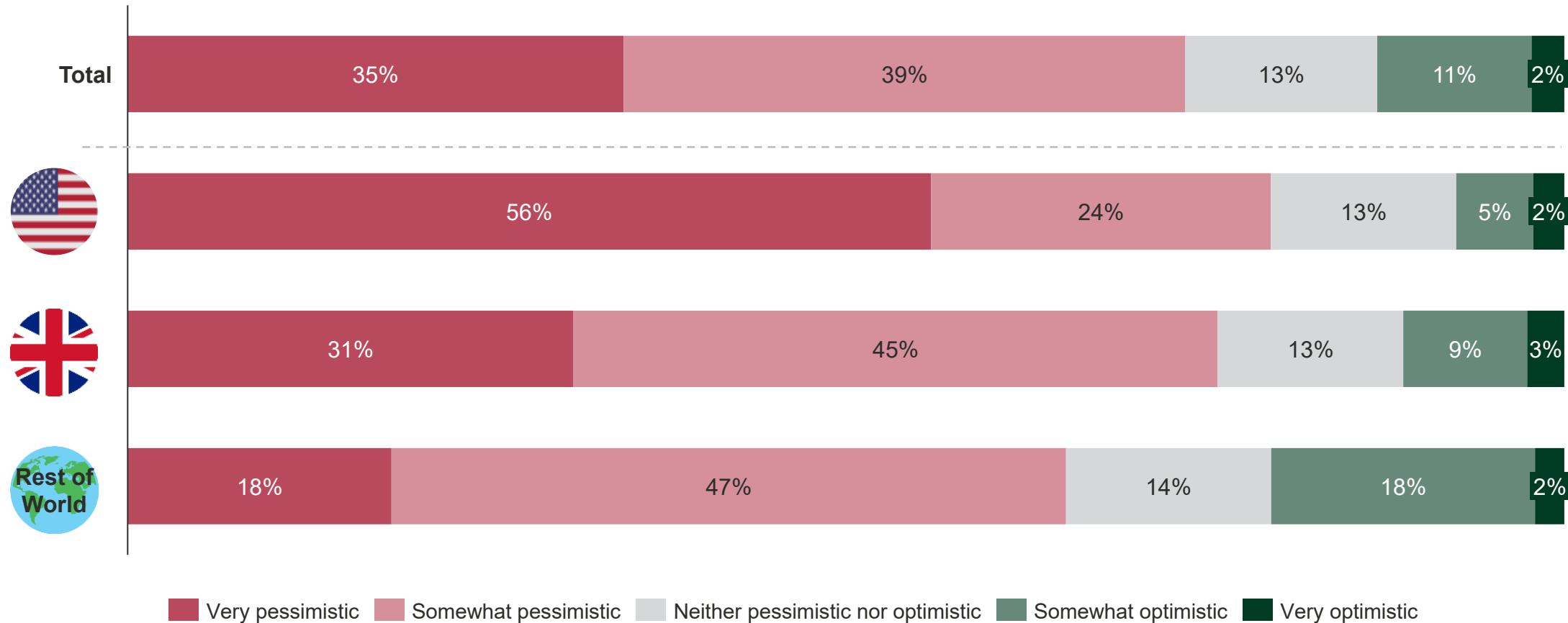
Total n: 186, UK: 76; NL: 47; U.S.: 39; ROW: 24

Note: Excludes those who answered 'Don't know'.

Source: HPA Business Outlook Survey: Q29 - How pessimistic or optimistic are you about your organization achieving its environmental sustainability targets?

And yet, nearly 75% of leaders are pessimistic about their country achieving the target of net zero greenhouse gas emissions by 2050, particularly those in the U.S.

Sentiment around country achieving its net-zero emissions targets, by country (Q4 '25)



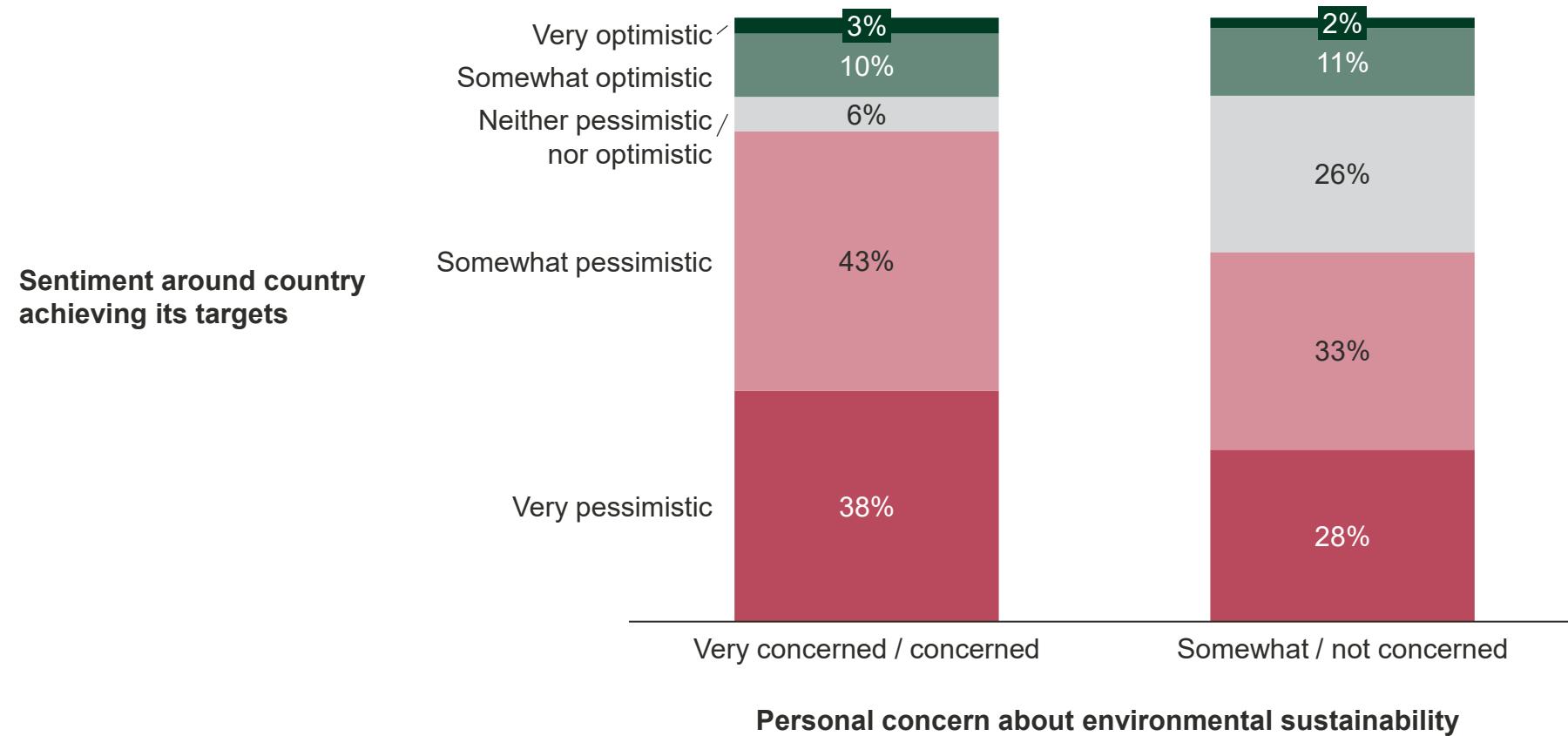
Total n: 307; U.S. n: 109; UK n: 119; RoW n: 99

Note: Excludes those who answered 'Don't know'

Source: HPA Business Outlook Survey: Q27 - How pessimistic or optimistic are you about your country achieving the target of net zero greenhouse gas emissions by 2050?

Business leaders who are personally concerned about environmental sustainability are more pessimistic about their country's ability to achieve net zero targets by 2050

Sentiment around country achieving its net-zero emissions targets, by personal concern about environmental sustainability (Q4 '25)



Total n: 307

Note: Excludes those who answered 'Don't know' or 'Doesn't apply'

Source: HPA Business Outlook Survey: Q26 - How concerned are you personally about environmental sustainability?; Q27 - How pessimistic or optimistic are you about your country achieving the target of net zero greenhouse gas emissions by 2050?

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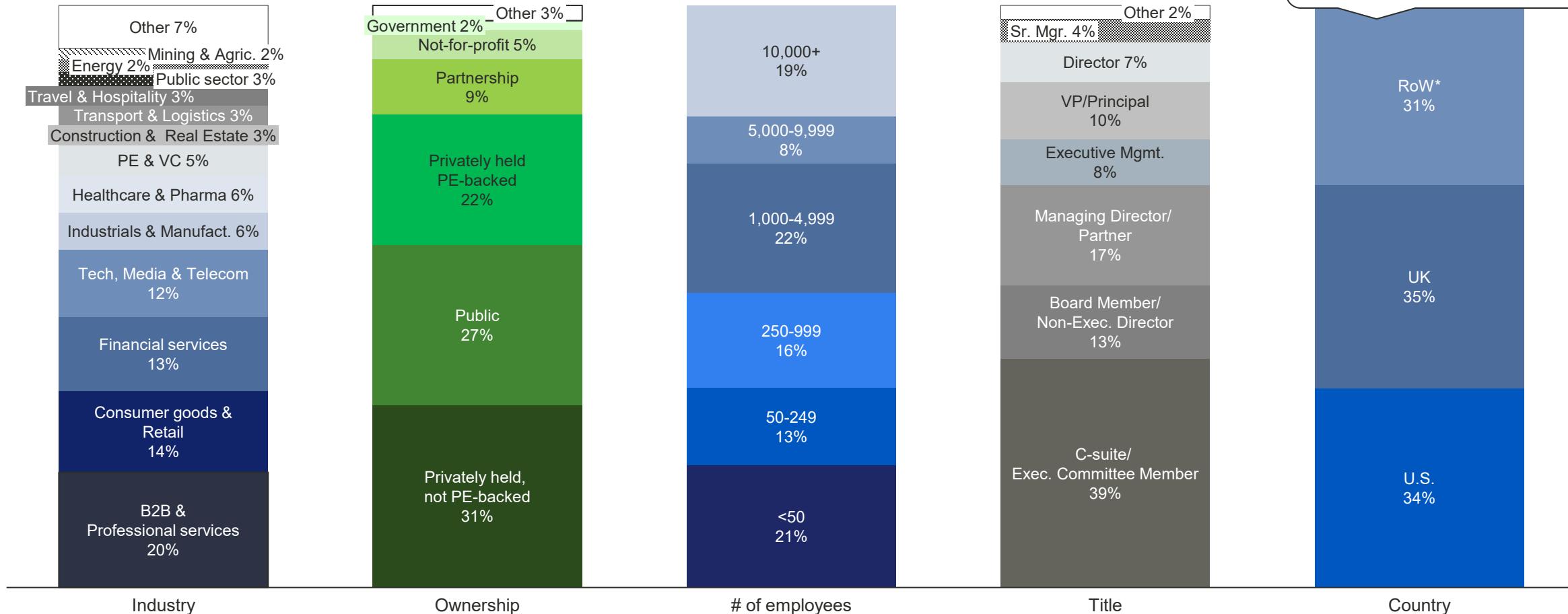
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Survey Demographics



We surveyed 379 business leaders across a broad range of industries within companies of varying sizes and ownership models

Survey respondent demographics



n: 379

*RoW participants include Netherlands (72), Germany(6), Canada (4), France (4), Ireland (4), Switzerland (4), Belgium (3), Italy (3), China (2), UAE (2), Finland (2), Singapore (2), Sweden (1), Spain (1), Austria (1), Australia (1), India (1), Japan (1), Prefer not to say (2)

Source: HPA Business Outlook Survey: Q1 - Which industry is your company / organization in?; Q4 - How would you best describe your organization?; Q2 - How many people does your company / organization employ in total?; Q5 - Which of the following best describes your role within your organization?; Q3 - In which country do you live? Please select one.

Additional survey sample information

Key facts

	INDUSTRY FOCUS		OWNERSHIP STRUCTURE				COMPANY SIZE (FTES)		
	B2B	B2C	Publicly listed	Privately held	Partnership	Gov or NGO	0-249	250-4,999	5,000+
	36%	57%	30%	25%	12%	0%	31%	47%	32%
	45%	45%	25%	21%	7%	2%	36%	42%	22%
	54%	39%	27%	21%	9%	2%	36%	37%	27%

n: 379; B2B and B2C split excludes those who answered 'Other' for Industry focus (12 in UK, 5 in NL, 8 in U.S. and 3 in RoW); Ownership structure split excludes those who answered 'Other' for ownership structure (2 in UK, 5 in NL, 2 in U.S., 1 in RoW)

Source: HPA Business Outlook Survey: Q1 - Which industry is your company / organization in?; Q4 - How would you best describe your organization?; Q2 - How many people does your company / organization employ in total?; Q3 - In which country do you live?