

Emerging Trends

EXTRACT



# EMERGING

**Client attitudes to AI  
and barriers to  
implementation today**

**Report**

June 2025

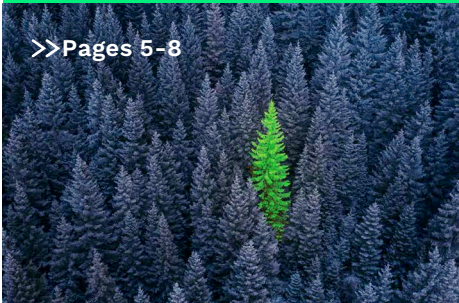
# Contents

# 1

## What really matters

We identify the things that really matter for firms—a snapshot of the most important dynamics in the market.

>> Pages 5-8



# 2

## AI in business, today and tomorrow: Opportunities and barriers

We explore how clients use AI today, where future opportunities will lie, what are clients' biggest concerns and where are clients seeing the greatest pushback.

>> Pages 9-20

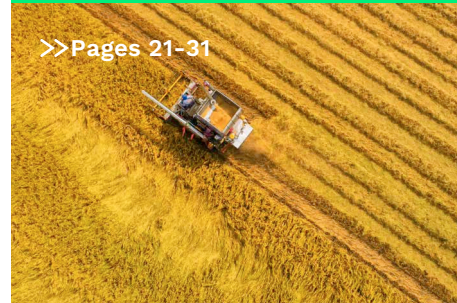


# 3

## A functional view: Tailoring AI solutions to the buyer

We identify the greatest differences in AI views across functions, and highlight what firms should expect to address to win clients over.

>> Pages 21-31

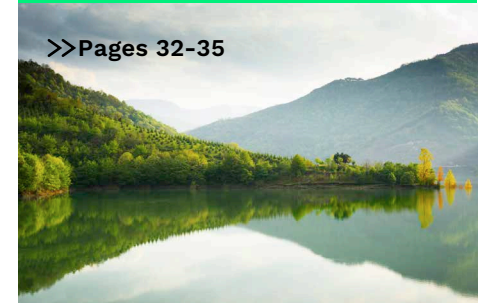


# 4

## AI-enabled delivery: What clients expect from consultants

We look into clients attitudes and expectations around the usage of AI for professional services delivery, how that will change project delivery, and which firms are in the best position.

>> Pages 32-35



## About this report

>> Pages 36-37

## About us and other reports

>> Pages 38-39

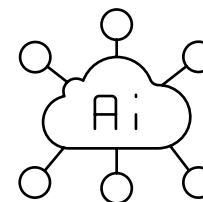
# Introduction

## Over the last year, AI has become more than just a buzzword

While well-funded researchers have been working on achieving Artificial General Intelligence (AGI) for over a decade, new digital tools have propelled AI out of the lab and into the mainstream. The introduction of conversational generative AI (GenAI) tools and the ease and speed with which large language models (LLMs) produce serviceable documents has driven consumers, clients, and consulting firms to explore how and when this technology can be deployed to speed up tasks that previously could take hours or even days. From adjusting the tone of voice of email communications to producing skeleton consulting proposals, to serving as a virtual butler, the possibilities are extensive—if you are willing to take on the risk of “hallucinations”.

Consulting firms have guided clients through many revolutions in business, and this one is no different. The market for AI-related offerings is growing; clients are looking to firms to show them how to use these tools to create value and expect consultants to integrate AI into the delivery of other projects, too. For firms, there’s a pressing challenge to understand clients’ needs, objectives, and reservations about this technology—and to meet their rising expectations.

This report mines client attitudes to AI, drawing on a global survey of 150 senior buyers of consulting. We explore how clients are using (and plan to use) GenAI to make their operations better, faster, and cheaper, alongside the barriers to doing so. Taking a functional view, we examine the distinct challenges clients face in adopting AI and how firms can tailor solutions to target their needs. Finally, we explore how clients expect firms to deploy AI in their own delivery.

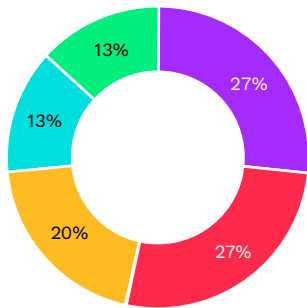


Almost half of clients (47%) claim they already use AI to a great extent, and just 2% say they are not planning to deploy AI

# Methodology

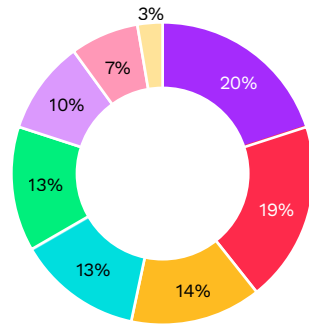
We surveyed 150 senior executives in May 2025, all of whom have been involved in an internal AI initiative in some capacity and are buyers of professional services. Respondents worked in five geographies, all of which are important in terms of scale and/or growth potential—the US, UK, Germany, France, and the GCC. They were also drawn from a representative mix of sectors and functions. Approximately two thirds came from organisations with more than 5,000 people.

Respondents by geography



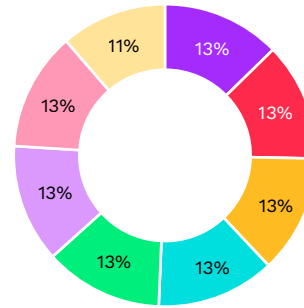
UK  
US  
GCC  
France  
Germany

Respondents by sector



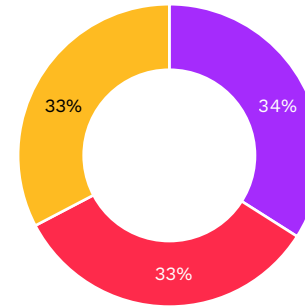
Retail  
Energy & resources  
Financial services  
Manufacturing  
TMT  
Healthcare  
Pharma & life sciences  
Services

Respondents by function



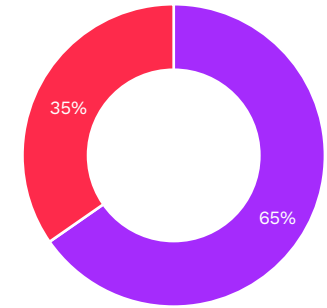
Finance  
Human resources  
IT, data & analytics  
Marketing & sales  
Operations  
Risk/compliance  
Strategy  
General management

Respondents by responsibility



Direct report into CxO/  
board-level management  
CxO/board-level  
management  
Head of department

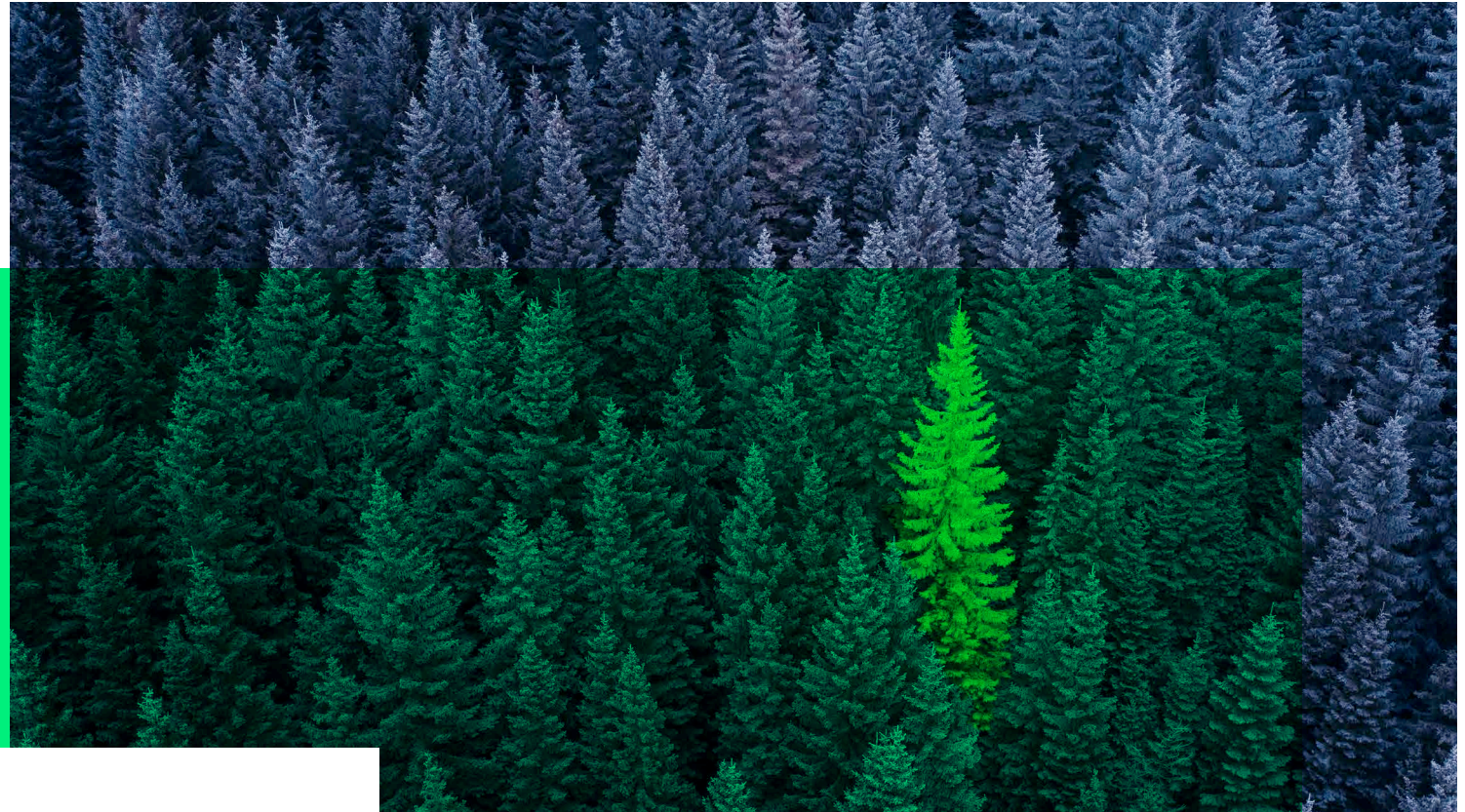
Respondents by headcount



5,000+ employees  
1,000-4,999 employees



1



**“Nowadays everybody is using GenAI because that is the buzzword. But what is the effective use of AI is more important.”**

CxO, banking, IT, India

## What really matters

Almost half of clients claim they already use AI extensively .....6

Not everyone is on board with the growing role AI plays.....7

Clients now expect (and often prefer) firms to use AI to deliver their projects and solutions .....8



2



# AI in business, today and tomorrow: Opportunities and barriers

AI is no longer a new and mysterious concept .....	10
Clients are already widely using AI .....	11
Mid-sized clients are more likely to try and develop AI solutions independently .....	12
ChatGPT uptake demonstrates the power of the first-mover advantage .....	13

**“We’re thinking about our strategy, how AI can contribute to the business.”**

CxO, pharma & healthcare, operations, India

Uptake of premium AI benefits from parent company bundles.....	14
Most clients are using GenAI on a daily basis.....	15
Summarisation, analysis, and content generation are the most popular use cases today .....	16
AI is already assisting staff with the majority of their work.....	17
Clients are open to using AI... ..	18
...but they face pushback, mainly from their senior-level peers .....	19
In some organisations, the use of AI remains off limits for certain functions.....	20



# 3

## A functional view: Tailoring AI solutions to the buyer

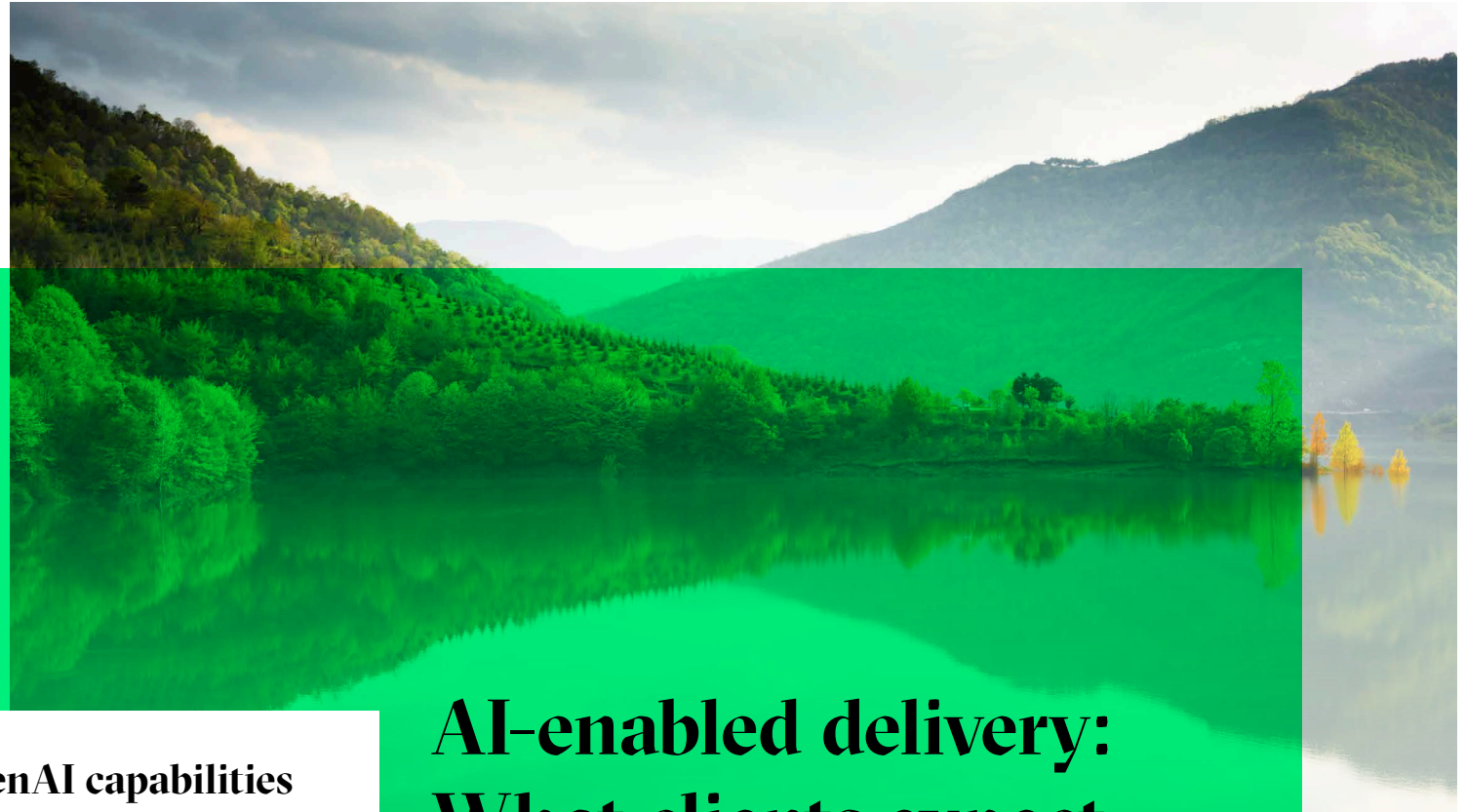
HR clients are concerned about hallucinations and funding for AI .....	22
Internal policies prevent AI deployment in some tax functions .....	23
Necessary human checks and staff pushback hinder AI adoption in regulatory/compliance .....	24
Operations functions are mostly concerned about the business case for AI .....	25

Clients are not deploying AI in the IT functions due to worries about laws and fears about being reliant on external providers .....	26
Local laws are holding back AI deployment in cybersecurity .....	27
Laws and regulations are holding back AI deployment in finance.....	28
Reluctant staff are the biggest barrier to AI deployment in marketing functions .....	29
AI deployment in sales will hinge on the preferences of end customers .....	30
In order for AI to play a greater role in the strategy function, its value will need to be clear.....	31

**“Yes, of course  
I use GenAI a lot.”**

CxO, public sector, IT, Canada

## 4



**“We are using GenAI capabilities but we’re doing those typically in the context of some enterprise software capability where that’s embedded. Like a Microsoft Copilot or something like that.”**

CxO, manufacturing, IT, US

## AI-enabled delivery: What clients expect from consultants

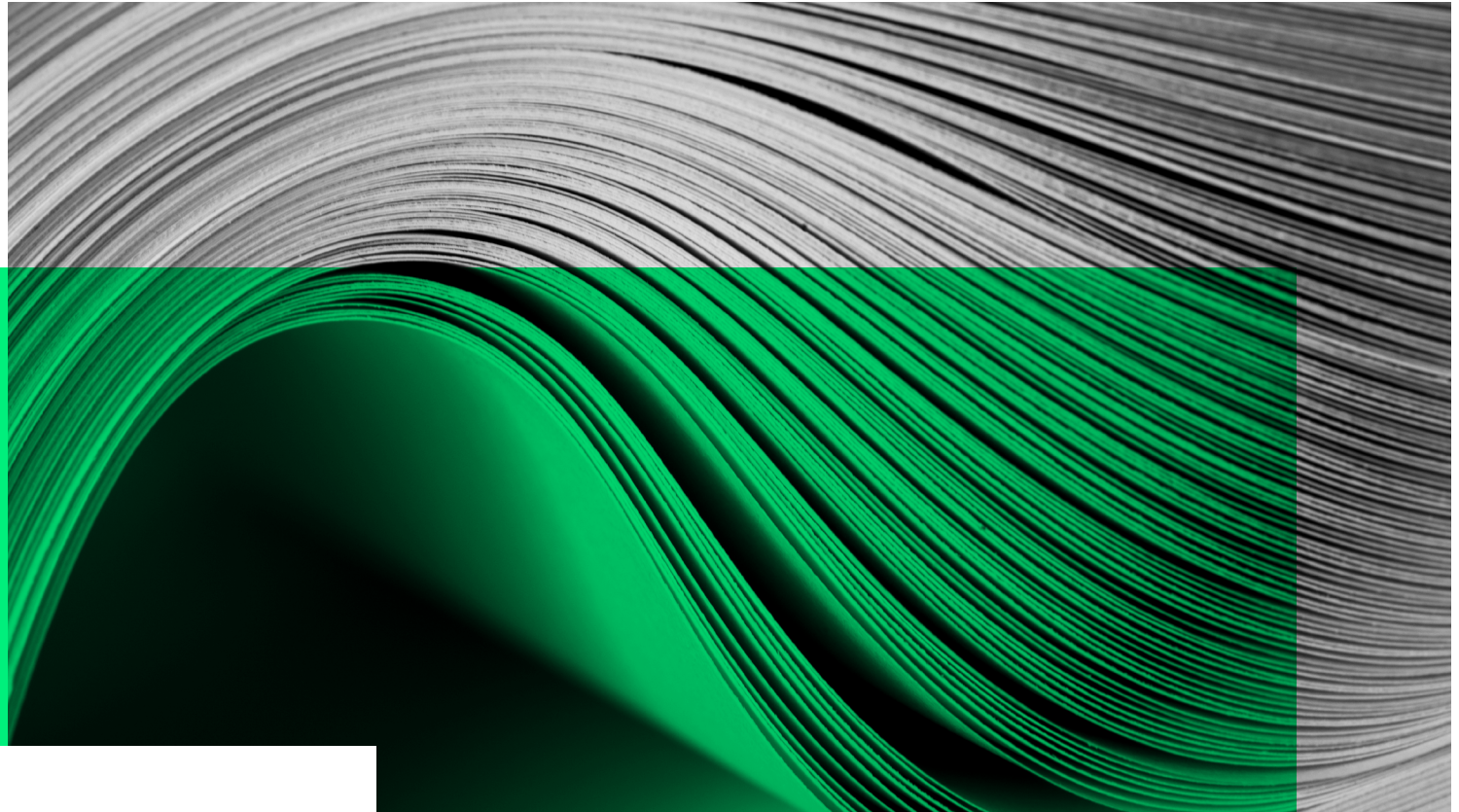
Nearly all clients are positive about firms’ use of AI to deliver professional services.....33

Most clients expect firms using AI to deliver projects faster..... 34

Established firms are in prime position to win AI work from clients .....35



5



**“I use AI daily, and it makes me more efficient as a leader.”**

Direct report, TMT, sales, UK

## About this report

Meet the expert.....	37
About us.....	38
Publication schedule 2025 .....	39

# Meet the expert

## Tony Maroulis

Tony is a Principal Consultant in the Market Trends team. He joined Source in September 2022 and works on a range of regular and custom reports. Prior to joining Source, Tony spent a decade as an industry analyst at Ampere Analysis, leading a team of 15 analysts to market size the TMT sector. This included maintaining syndicated products, leading and delivering custom projects, speaking to journalists, and presenting at industry events.

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# About us

**We help professional services firms understand what really matters when facing decisions of vital importance.**

The best decisions are based on evidence, objectivity, and a willingness to change. That's why, at Source, we tell you what you need to hear, rather than what you want to hear.

We draw upon our deep roots within the professional services sector to provide firms with a clear picture of their clients' worlds. Through comprehensive research and meticulous analysis, we pinpoint what truly matters and deliver actionable insights that help firms map out the right way forward.

We believe in thriving individually and succeeding together. And we would love to help your firm crack its latest conundrum.

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# Publication schedule for 2025

2025		Market Trends Reports	Market Trends Briefings	Client Perceptions Studies	Emerging Trends Programme	White Space Reports	White Space Insights
Q1	January	Forecasts for 2025 UK US GCC France		UK US GCC France			Featured thought leadership (monthly) Quarterly webinar series
	February				Pricing: Expectations vs. Reality		
	March					Quality Ratings Report (QRR)	
Q2	April	Nordics DACH Australia East Asia South East Asia Africa	India South America	Germany Australia China Japan Retail Energy & Resources Financial Services Technology, Media & Telecoms	What's next for people, HR & change consulting?		Featured thought leadership (monthly) Quarterly webinar series
	May						
	June				Client attitudes to AI and barriers to implementation today	Client Perceptions of Thought Leadership	
Q3	July	Energy & Resources Financial Services Technology, Media & Telecoms Sustainability	Healthcare & Pharma	Risk Tax			Featured thought leadership (monthly) Quarterly webinar series
	August				ET4		
	September					Thought Leadership Innovation	
Q4	October	Tax Risk Technology Planning for Growth in 2026	Public Sector	Audit Technology	ET5		Featured thought leadership (monthly) Quarterly webinar series
	November						
	December				ET6	Hot Topic Report	