



# THE LUX INNOVATION SURVEY 2025:

Decoding the Impact of AI and Tariffs on  
Innovation



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# AGENDA

**1** | **Key themes driving innovation in 2025**

**2** | Innovation survey: How are companies responding?

**3** | Outlook: Planning for uncertainty



## Anti-ESG policy



A large container ship is shown from a low angle, sailing on the water. The ship's hull is dark grey, and its upper sections are filled with stacks of colorful shipping containers in shades of green, blue, and red. The ship is moving towards the right, leaving a wake in the water. The background features a calm sea and a distant shoreline under a warm, orange-hued sky, suggesting a sunset or sunrise.

①

**Anti-ESG  
policy**

②

**Tariffs  
and trade**



Hi, I'm DeepSeek.

How can I help you today?

Message DeepSeek



DeepThink (R1)



Search

①

**Anti-ESG  
policy**

②

**Tariffs  
and trade**

③

**AI and  
agents**



# Focus of our survey



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DeepThink (R1)



Search

①

Anti-ESG  
policy

②

Tariffs  
and trade

③

AI and  
agents

# AGENDA

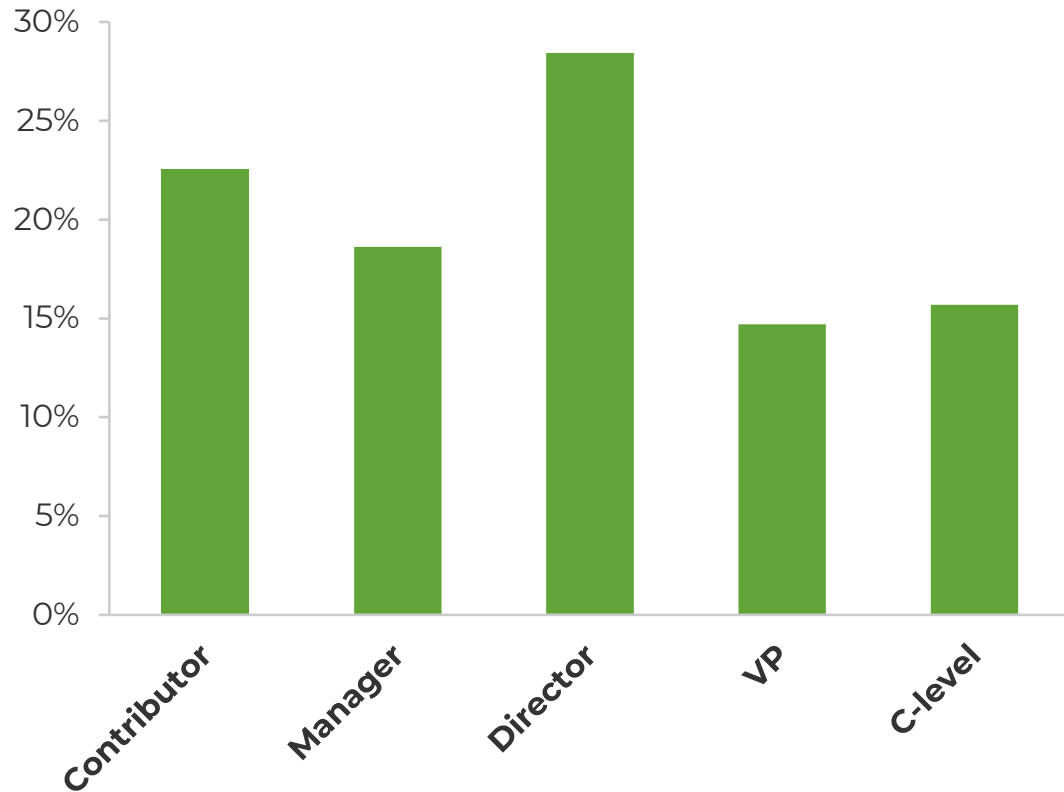
1 | Key themes driving innovation in 2025

2 | **Innovation survey: How are companies responding?**

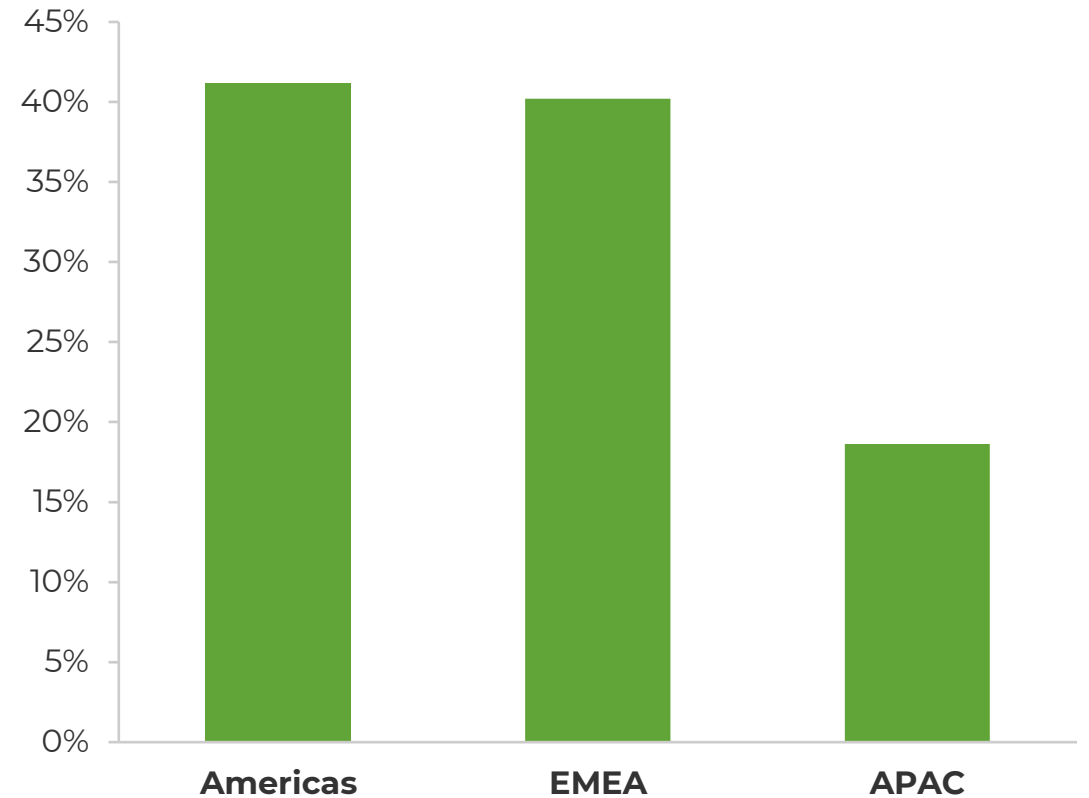
3 | Outlook: Planning for uncertainty

# THE 2025 LUX INNOVATION SURVEY IS A SNAPSHOT OF INNOVATION LEADERS

Survey Respondents by Title



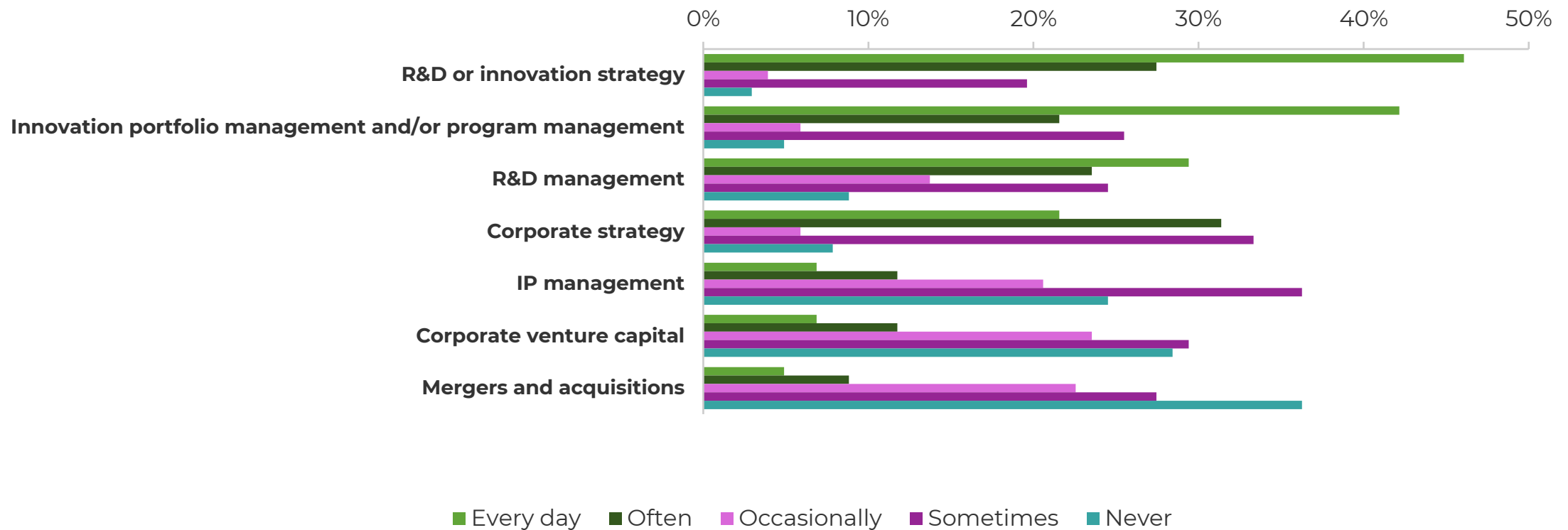
Survey Respondents by Region





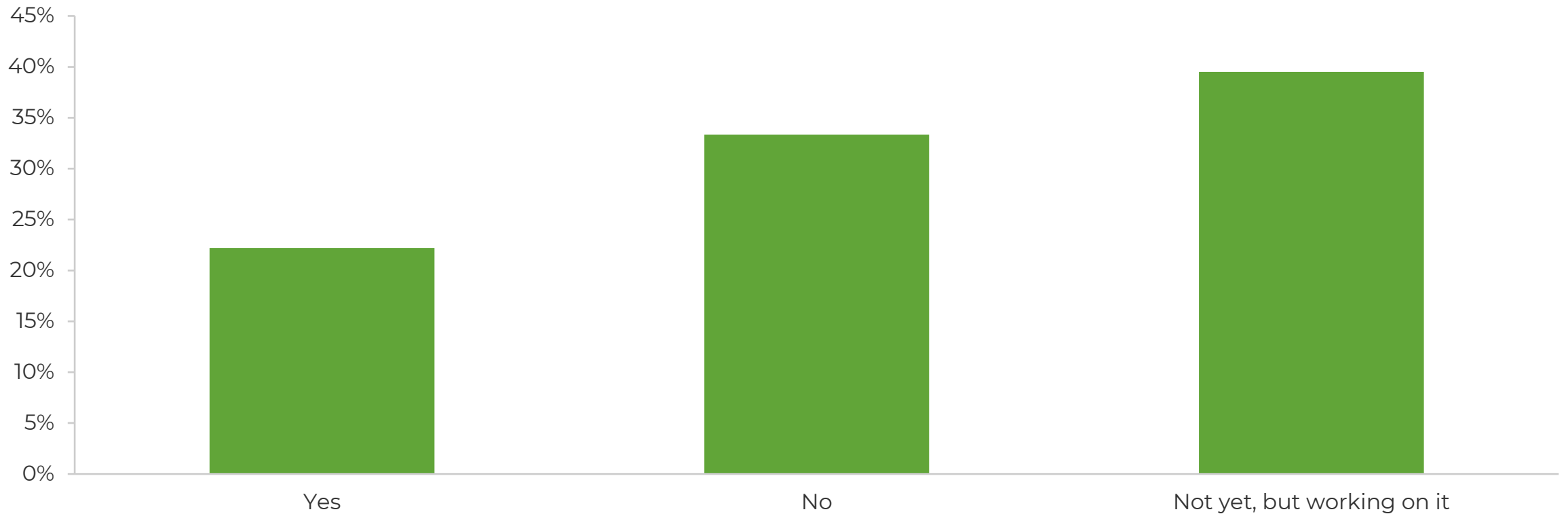
# SURVEY RESPONDENTS PRIMARILY WORK IN CORE INNOVATION FUNCTIONS

How often does your role require you to occupy yourself with the following activities?



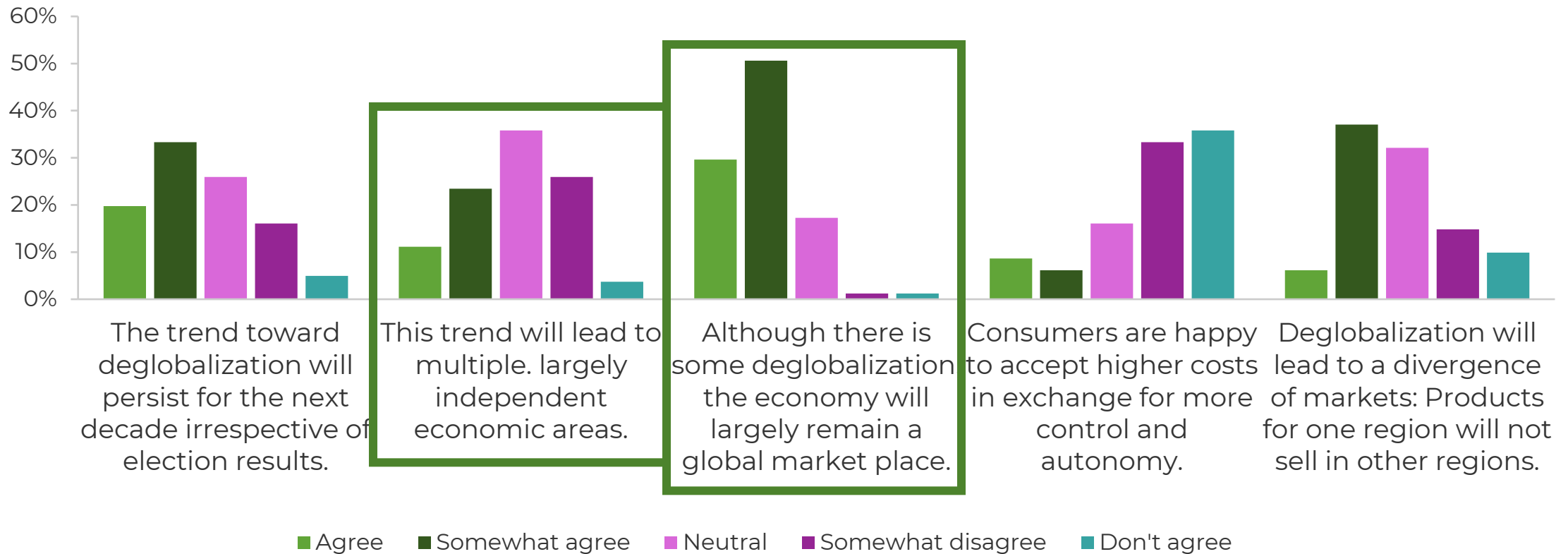
# MOST COMPANIES PLAN TO CHANGE INNOVATION DUE TO DEGLOBALIZATION

Do you have plans in place to change your innovation portfolio in response to tariffs and deglobalization in general?



# BUT LEADERS HAVE CONTRADICTIONARY VIEWS ON DEGLOBALIZATION

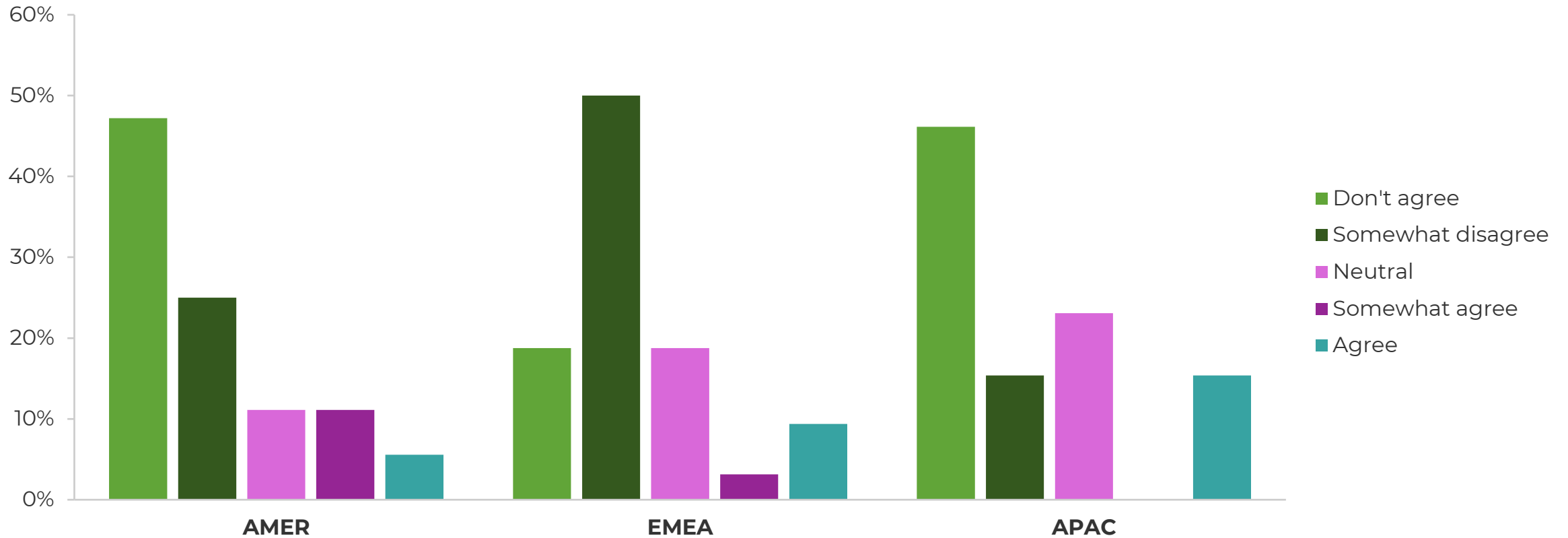
Do you agree with this view on deglobalization?





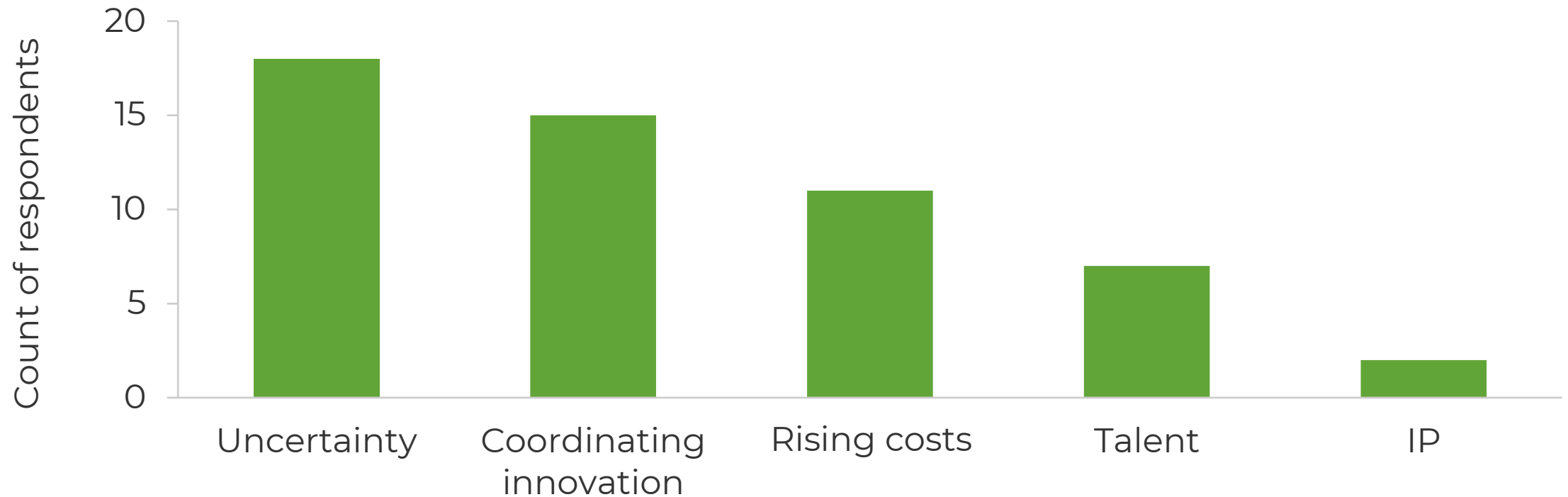
# EMEA INDICATES A GREATER WILLINGNESS TO PAY FOR AUTONOMY

Consumers are happy to accept higher costs in exchange for more control and autonomy.



# UNCERTAINTY IS THE KEY CHALLENGE

**What do you see as your main challenges when responding to deglobalization?**



# INNOVATION TEAMS ARE MORE REGIONALLY FOCUSED

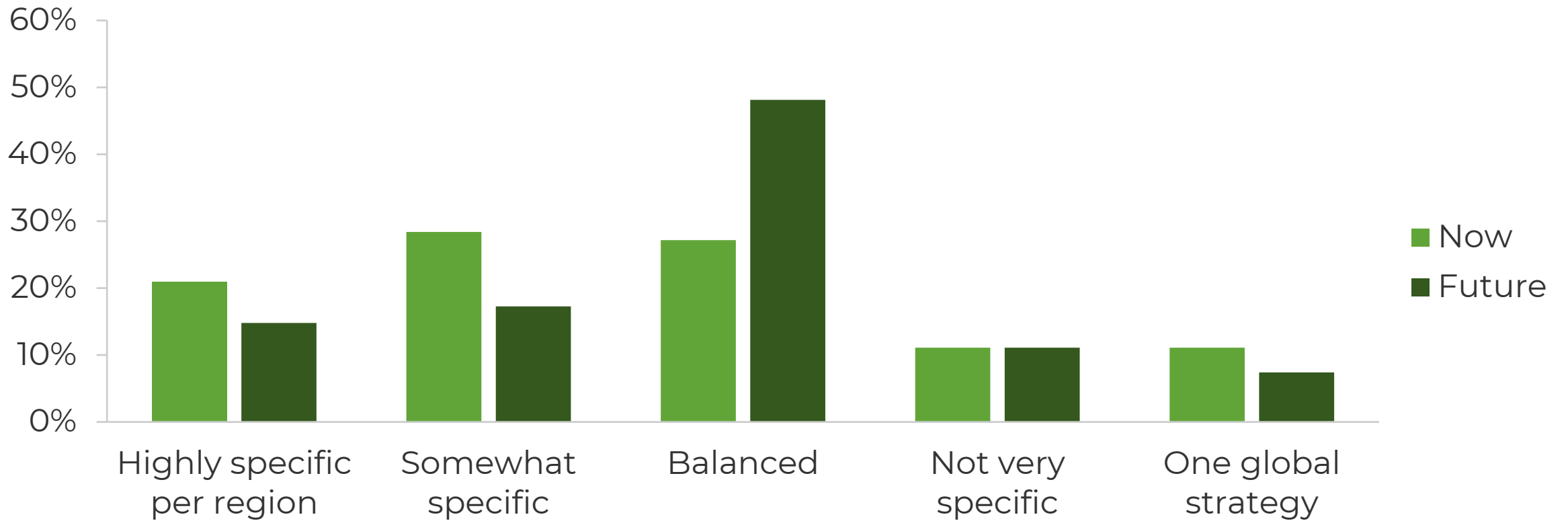
How “global” are your current innovation efforts?





# INNOVATION TEAMS ARE SHIFTING THEIR COMPOSITION TO RESPOND

Shift in Innovation Team Composition



# DEGLOBALIZATION SURVEY OUTLOOK

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1. Innovation leaders don't have a clear view of deglobalization but plan to change course anyway.
2. Corporate innovation structures are under strain in this new world of high uncertainty and rapid change.
3. Innovation leaders are responding by reshuffling where their teams are located.

# INNOVATORS ARE BULLISH ON AI, CITING ON SPEED AND INTELLIGENCE

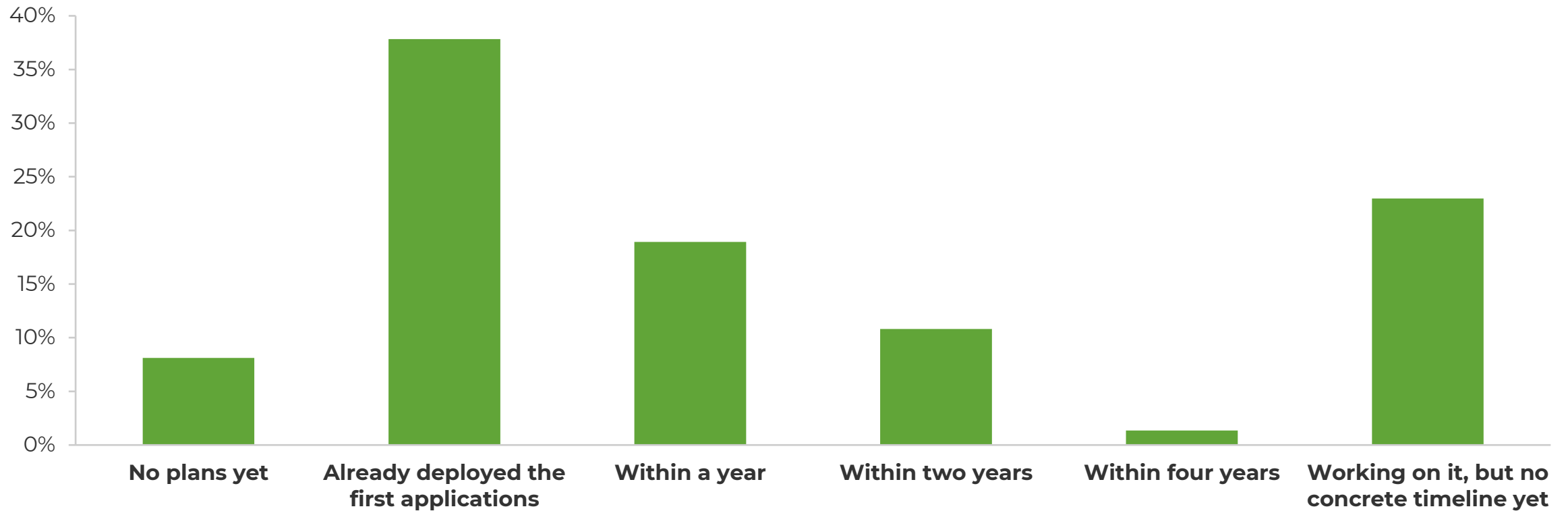
What do you think could be the impact of AI on your innovation efforts?





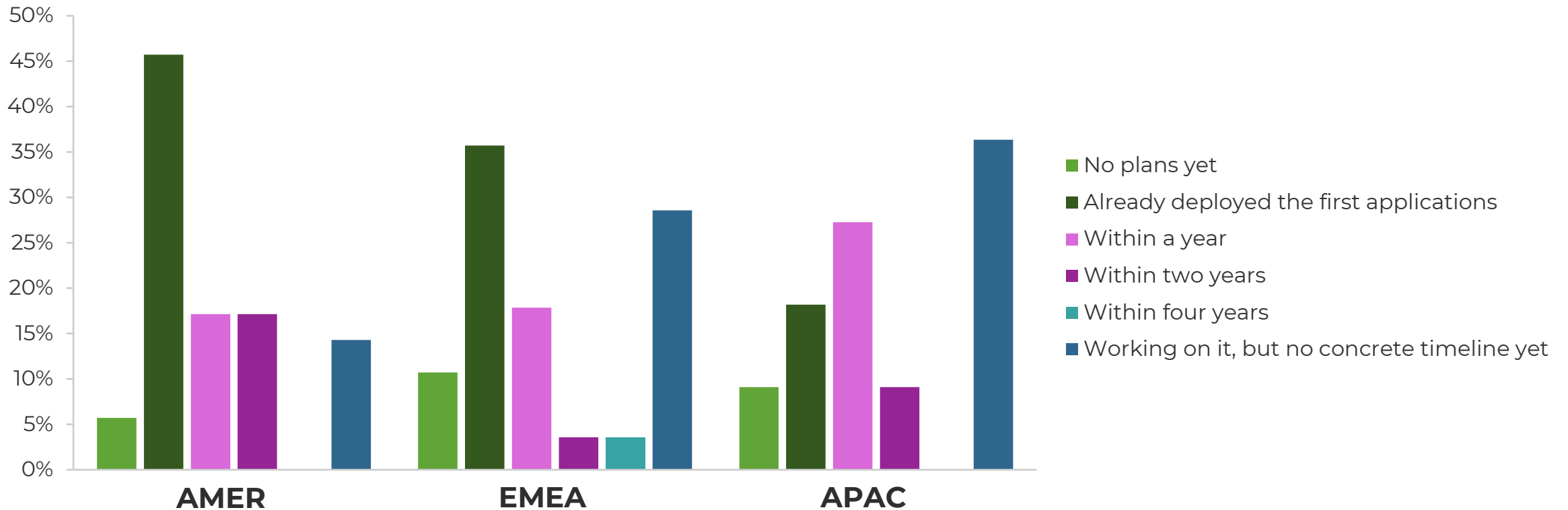
# COMPANIES ARE MOVING QUICKLY TO DEPLOY AI

When do you envision deploying the first AI applications in your innovation governance processes at the corporate scale?



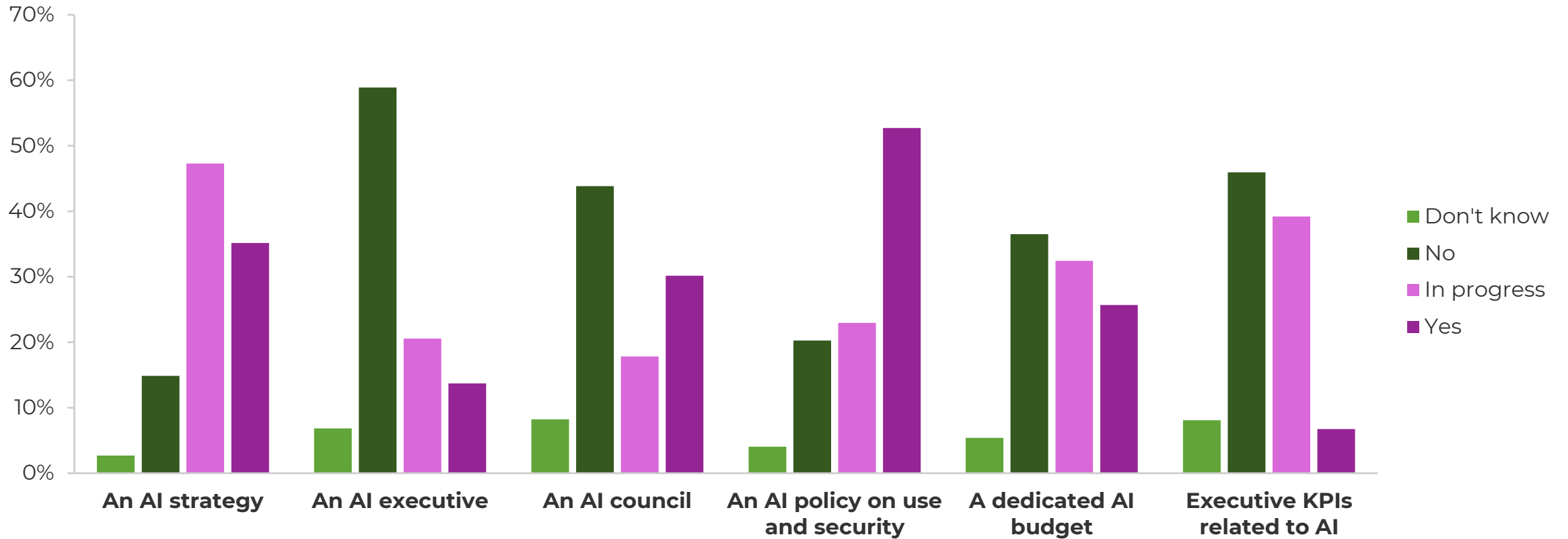
# APAC LAGS ON AI DEPLOYMENT

When do you envision deploying the first AI applications in your innovation governance processes at the corporate scale?



# ONLY 1/3 OF COMPANIES HAVE A STRATEGY

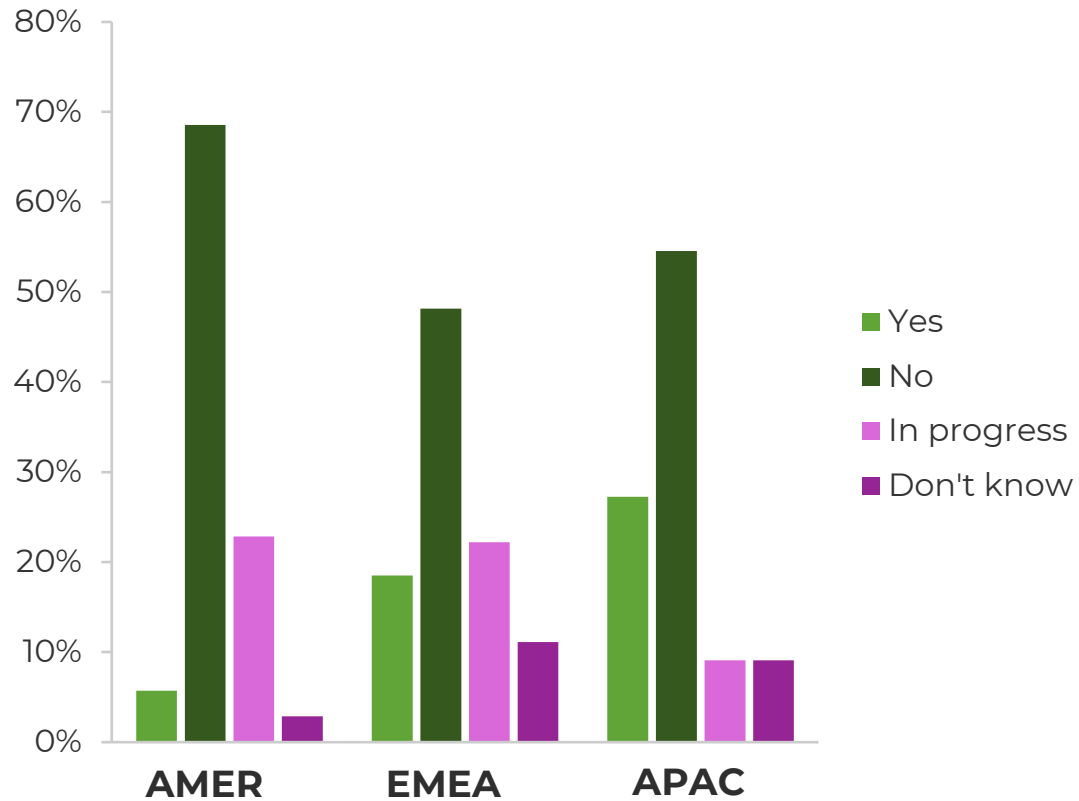
In terms of corporate structure around the use and development of AI, do you have...



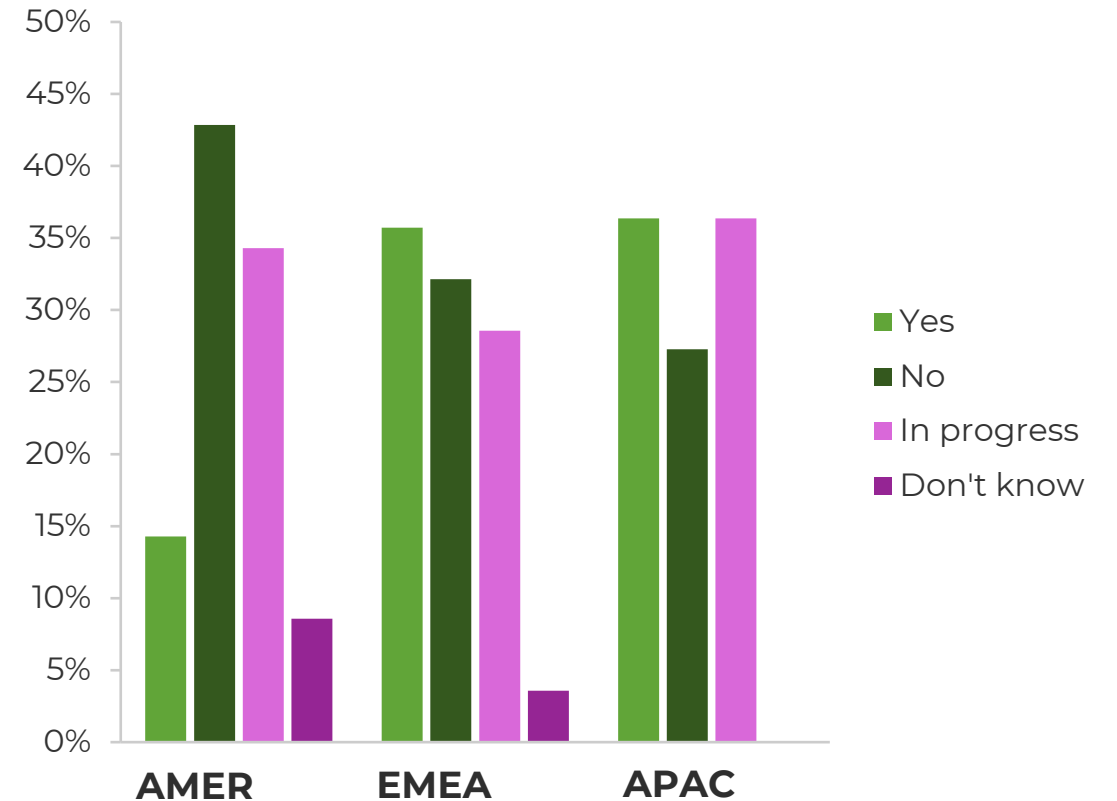


# APAC COMPANIES HAVE EXECS AND BUDGETS...

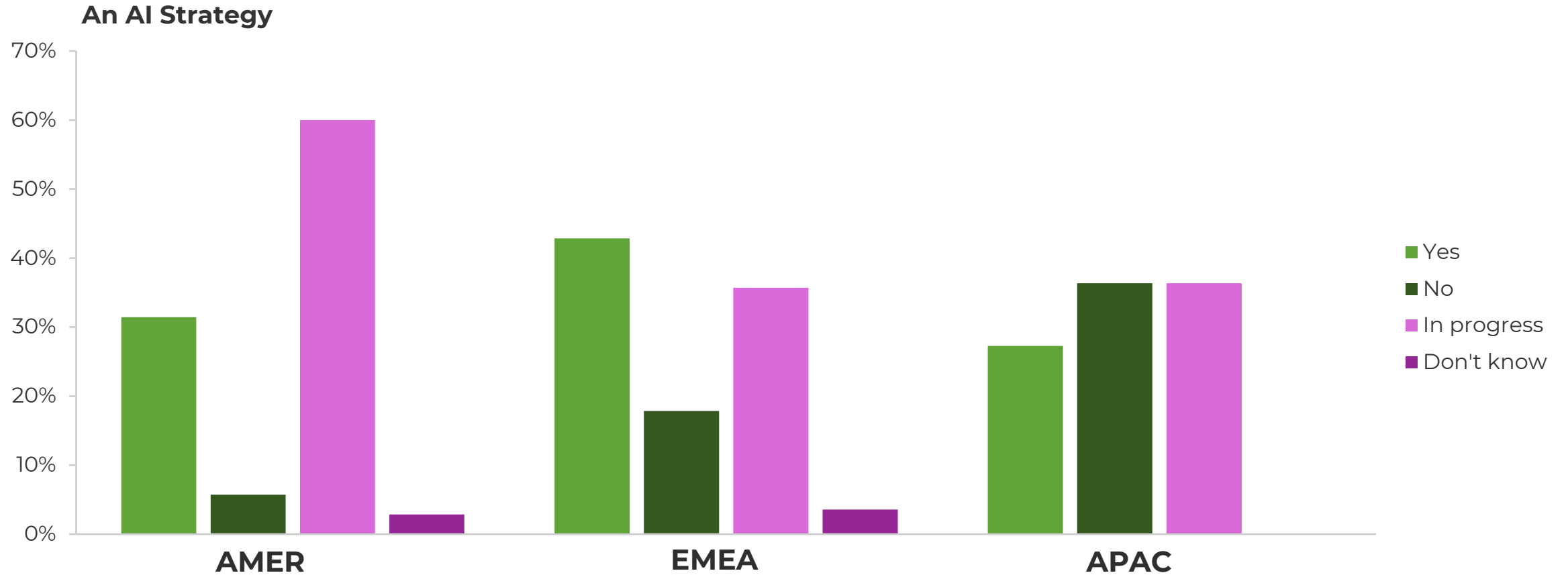
**An AI Executive**



**A Dedicated AI Budget**

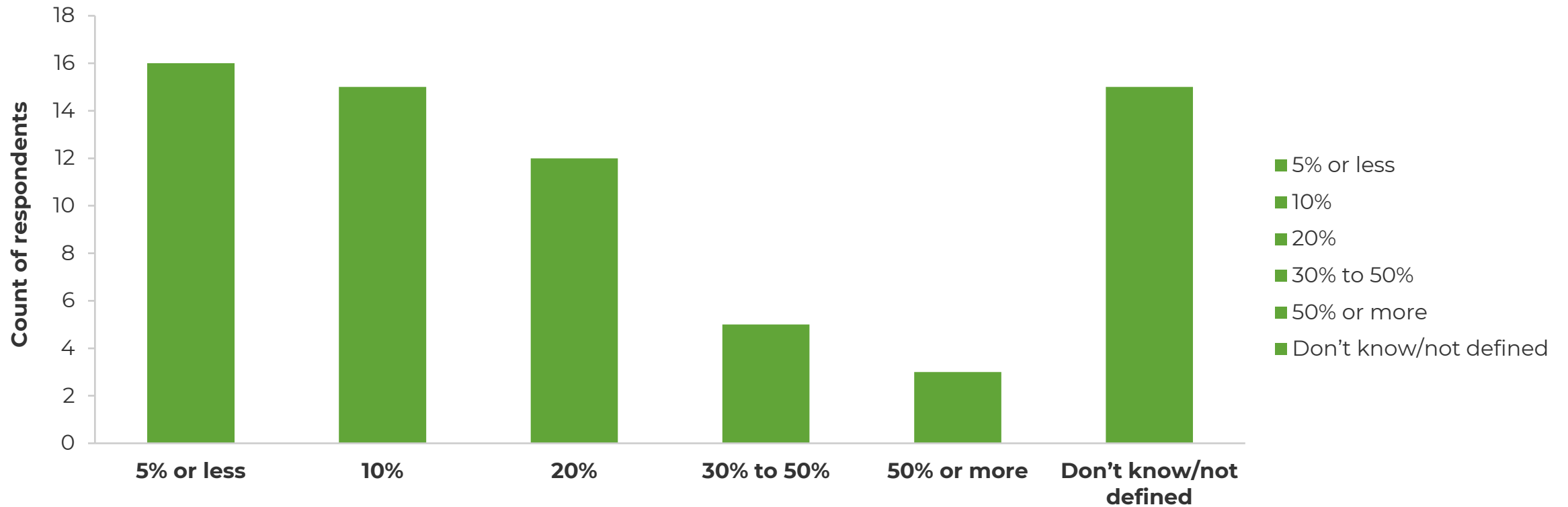


# ...BUT NOT AN AI STRATEGY



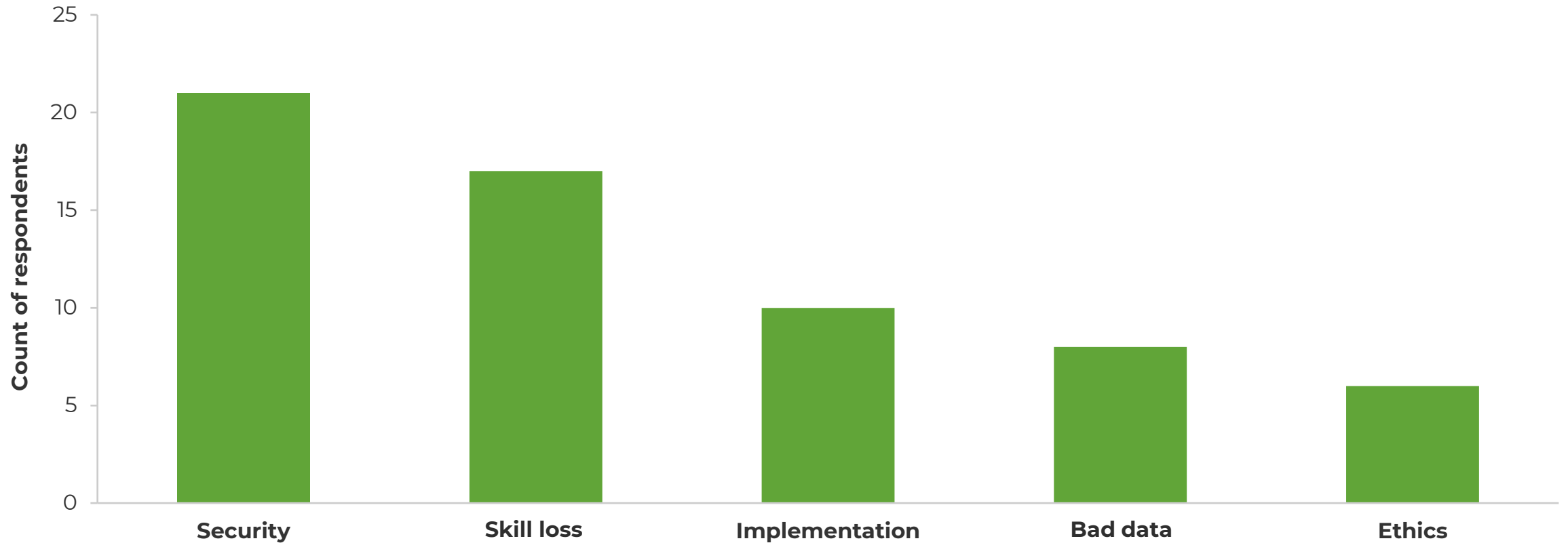
# INNOVATORS ARE STILL SOMEWHAT WARY OF OVERCOMMITTING TO AI

What percentage of your innovation budget do you plan to spend on AI in the coming three years?



# SECURITY AND SKILL LOSS ARE THE BIGGEST CONCERNS

What are your main concerns and perceived threats or issues related to the use of AI?



# AI SURVEY KEY TAKEAWAYS

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1. Leaders are already deploying AI proofs of concept — but should keep spending commitments low as ROI remains unclear.
2. There's no established best practice on what KPIs to measure, and most of the benefits of AI are still speculative.
3. U.S. companies are deploying AI in a bottom-up way, while companies in EMEA and APAC are more process oriented and top down.

# AGENDA

1

Key themes driving innovation in 2025

2

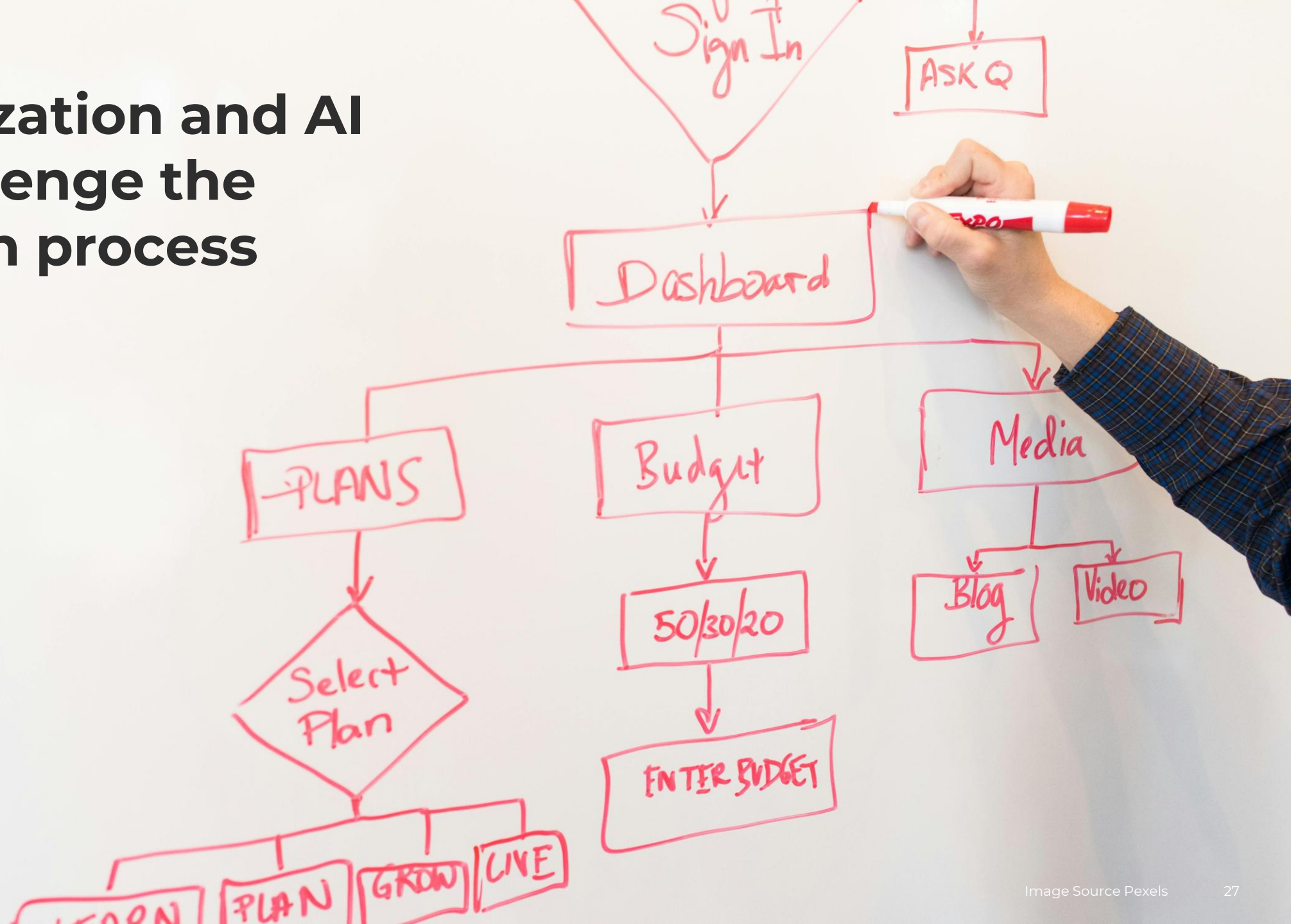
Innovation survey: How are companies responding?

3

**Outlook: Planning for uncertainty**



# Deglobalization and AI both challenge the innovation process





**Deglobalization and AI  
both change where the  
economy creates value**





**Deglobalization and AI  
both challenge companies  
to be opportunistic**



# KEY TAKEAWAYS

1

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**Innovation leaders are reacting without long-term understanding.**

The pressure of responding to big shifts like AI and decarbonization is leading innovation leaders to act despite not having a clear vision of the future.

2

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**Innovation processes need to change.**

Innovation processes assume a relatively static world — they need to be updated to take advantage of AI and enable more flexible decision-making.

3

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**Innovators need to focus on seizing opportunities.**

Innovation leaders have a defensive stance toward these changes, but merely treading water isn't sufficient to grow businesses.



# THANK YOU

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# ABOUT LUX

Lux Research fuels innovators to not only imagine what's possible in the future but also operationalize innovation success in the near term. We deliver research and advisory services to inspire, illuminate, and ignite innovative thinking that reshapes and grows businesses. Using quality data derived from primary research, fact-based analysis, and opinions that challenge traditional thinking, our experts focus on finding truly disruptive innovations that are also realistic and make good business sense.



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