



# UNLOCKING MEXICO'S AI POTENTIAL 2025

## Introduction

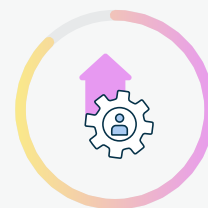
Businesses across Mexico are accelerating their use of artificial intelligence<sup>1</sup> at an unprecedented pace. In the past year alone, 495,000 businesses in Mexico began using AI<sup>2</sup> – equivalent to nearly one every minute. This brings the total percentage of AI-adopting firms to **38%**, up from **29%** a year ago, representing a growth rate of **31%**. Today, over a third of all businesses in Mexico – or more than 2 million companies – have adopted AI.

Small and medium-sized enterprises (SMEs), which constitute the backbone of Mexico's economy, demonstrate similar adoption trends. Approximately **37%** of SMEs have integrated AI solutions, a substantial increase from **28%** in the prior year, representing a **32%** annual growth rate.

The benefits of AI adoption are already being felt.



**83%** of businesses that have adopted AI report increased revenue, at an average increase of **16%**.



Meanwhile, **88%** say they have already seen significant productivity improvements.

These gains are enabling businesses to redirect their focus toward enhancing customer service and relationships (**66%**) and developing new products and services (**61%**). Looking ahead, the outlook remains optimistic.



**83%** of those who have adopted AI say that the technology is likely to increase their growth in the next year



**80%** also expect cost savings in the next year, due to AI adoption.

Despite this encouraging momentum, truly transformative AI adoption remains limited. Only **3%** of all Mexican businesses, including both AI adopters and those yet to integrate the technology, are currently leveraging AI at an advanced level, embedding sophisticated AI capabilities across their operations to drive comprehensive digital transformation.

'This increase in adoption occurs in a context where Mexico is intensifying its efforts to drive national digital transformation. In early 2025, the Executive presented the [Digital Transformation and Telecommunications Agency \(ATDT\)](#) as the institution that will be responsible for unifying the technological capabilities of the Mexican Government for better utilization, generating technological autonomy and promoting technological solutions from within the public administration. Its current responsibilities include directing national policies on digital inclusion, government digitalisation, data intelligence and telecommunications; leading the cybersecurity strategy; managing telecommunications licenses; and promoting the transformation of digital services across the government.'

ATDT's flagship efforts have the primary goal of implementing a simplification and digitalisation process aimed at reducing administrative procedures, requirements, and processing times by **50%**, while ensuring that **80%** of Mexico's most commonly used administrative procedures and services are available digitally through the [Llave MX](#) programme. The Llave MX programme aims to significantly improve public service delivery and the ease of doing business in Mexico.

Similarly, the [National Alliance for Artificial Intelligence \(ANIA\)](#) was launched in 2023 through a collaboration between government, academia, and industry stakeholders. ANIA serves as a foundational platform to promote the responsible development and deployment of AI, representing a milestone in Mexico's pursuit of establishing national AI strategy.

Through such policy frameworks and strategic initiatives, Mexico can continue to create a more conducive environment for digital transformation, helping businesses across Mexico harness the full potential of AI to enhance productivity, innovation, and long-term competitiveness.

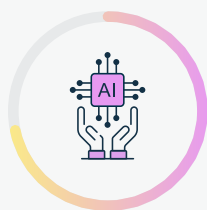


## Key findings from this study:

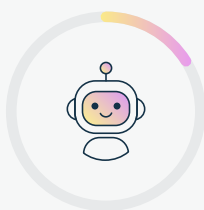
- Over a third (**38%**) of businesses in Mexico have adopted AI, up from **29%** in the last year.
- **83%** of Mexican businesses have seen a significant revenue increase as a result of AI. Businesses reporting revenue increases, experience growth of **16%** on average.
- **88%** say they have already seen significant productivity improvements. These gains are enabling businesses to redirect their focus toward enhancing customer service and relationships (**66%**) and developing new products and services (**61%**).
- **68%** of businesses believe that AI will transform their industry in the next five years.
- However, only **3%** of all businesses in Mexico are harnessing the most advanced uses of AI, leaving significant untapped opportunity for growth and innovation.
- A lack of digital skills remains the single largest barrier holding back AI adoption and innovation across Mexico; only **19%** of companies report having a strong AI skillset, and **40%** struggle to find local talent with the necessary expertise.

## The growing digital divide

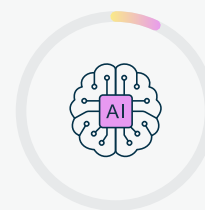
While AI adoption across Mexico is accelerating, many businesses are not harnessing its most advanced uses. Over a third of businesses in Mexico have adopted AI but celebrating these adoption figures alone risks masking an underlying trend. When examining how businesses are implementing AI, from initial experimentation to full transformation, most Mexican organisations still remain at basic levels of AI adoption.



**72%** of Mexican businesses that have adopted AI remain focused primarily on the basic uses of the technology and on incremental gains (e.g., driving efficiencies and streamlining processes), rather than innovation (e.g., developing new products or disrupting industries). These businesses are using publicly available chatbots for routine tasks such as scheduling assistants and purchasing ready-made AI solutions.



**16%** have advanced to the intermediate stage of AI adoption. These companies are moving beyond isolated applications and integrating AI across business functions, resulting in efficiency improvements and more innovative approaches to customer experience.



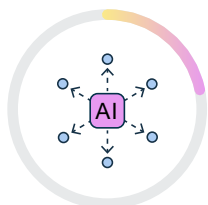
Only **7%** of Mexican businesses that have adopted AI have reached the most transformative stage of AI integration, using AI for its most advanced purposes. This amounts to just **3%** of all businesses in Mexico. Organisations at this stage are combining multiple AI tools or models for complex tasks by creating custom AI systems that transform their operations.

This underscores a critical divide in AI adoption. While AI is being widely used across businesses in Mexico, only a small section of organisations are harnessing the technology for its most transformative potential. Most companies are still exploring AI's surface-level benefits, missing out on the deeper strategic advantages it can offer. To fully realise AI's potential, more businesses will need to move beyond experimentation and efficiency gains, and toward deeper integration and innovation.

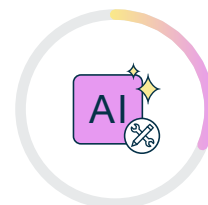


## Mexican startups are embracing AI innovation, but require support

Mexican startups<sup>3</sup> are emerging as leaders in AI adoption, with **41%** reporting that they have adopted the technology, compared to the average adoption of **38%**. A small segment of innovative businesses lead the way by using AI to enhance operations, and built entirely new products — using AI to enhance operations and also to build entirely new products, services, and business models. Supporting this high-performing group will be critical to maintaining momentum and ensuring that startups can continue to pioneer Mexico's AI-driven transformation.



**22%** of startups say AI is central to their business model or operations. Of AI-adopting startups, **29%** are using AI for their most advanced applications, far exceeding the national average of **7%**.



**31%** are developing new AI-driven products or services.



Just under four-in-ten (**37%**) of startups employ AI-specific talent, indicating a growing commitment to building and nurturing in-house AI expertise, ensuring businesses can develop, deploy, and refine AI-driven strategies.



Over three-quarters (**77%**) of startups believe AI will transform their industry in the next five years.

These startups represent significant untapped potential for Mexico. Those startups that have been able to successfully grow and scale with AI point to Mexico's proximity and access to multiple global markets (**37%**) and a diverse consumer market within the region (**35%**) as key factors in this success.

Initiatives such as [StartupMexico](#), Mexico's first innovation campus for entrepreneurs, a super hub connecting newly formed high-impact companies, seed capital funds, corporate implants and entrepreneurial services, are boosting collaboration and innovation among startups. Expanding support for such initiatives will be essential to unlocking startups' full potential in AI development.

However, these opportunities come with challenges. Access to digital talent is the most significant hurdle. **55%** of Mexican startups cite difficulty in attracting digital talent as the primary factor making Mexico uncompetitive – a greater concern than even a lack of funding (**41%**) or investment barriers (**40%**). Addressing this talent gap is critical. With the right support in talent development, funding access, and regulatory clarity, Mexico's startups are well-positioned to lead regional innovation and drive national economic competitiveness through AI, delivering on their untapped potential.



## Case Study: Transforming women's health in Mexico: How Plenna Is using AI to close the care gap

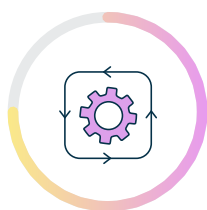


[Plenna](#) is Mexico's leading femtech company, dedicated to revolutionising women's health care by offering accessible, comprehensive, and personalised services. With a focus on gynecology, pregnancy care, and sexual health, Plenna serves women both in-person at its Mexico City clinics and virtually across the globe. Many women in Mexico face barriers to high-quality, empathetic healthcare, particularly for sexual and reproductive health, but Plenna is closing that gap with specialised services and cutting-edge technology provided by AWS.

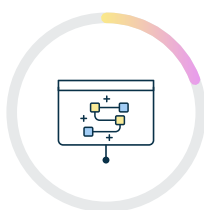
Plenna's holistic approach empowers women to take control of their health with tools and support that extend beyond the clinic, addressing not only their physical but also their emotional and social well-being. By fostering a more inclusive and patient-centered healthcare model, Plenna is transforming how women in Mexico experience medical care. "From day one, we set out to transform women's health in Mexico by offering care that truly listens to and understands the needs of every patient," says one of Plenna's founders. AWS enables Plenna's mission by powering their telemedicine and data-driven healthcare solutions with scalable cloud infrastructure.

## Large businesses prioritise efficiency ahead of innovation

A divide is emerging between startups and larger businesses<sup>4</sup>, who are not yet seeking to harness the most advanced uses of AI, resulting in an emerging 'two-tier' economy.



For **75%** of large businesses, their AI adoption remains at basic levels, where they are focused on incremental gains, such as driving efficiencies and streamlining processes.



Only **20%** have a comprehensive AI strategy, a roadmap that outlines how an organisation will leverage AI.



Fewer than one-in-ten (**9%**) are delivering a new AI-driven product or service by harnessing AI's deeper potential, less than a third of the proportion of startups (**31%**).

This two-tier dynamic poses a critical challenge. While startups are emerging as pioneers of transformative AI-driven innovation, the majority of larger firms remain at the early stages of adoption, limiting the broader economic and societal impact of AI. Bridging this gap by encouraging deeper, more strategic AI integration across businesses of all sizes is essential to fully unlocking AI's potential for Mexico.

Moving beyond basic adoption is key to unlocking the full benefits of AI for Mexico's economy and society. Recent [research](#) by the Telecoms Advisory Service, on behalf of AWS, found that cloud and AI added over \$14.25 billion to Mexico's GDP in 2023. The research also found that cloud as a whole is set to add \$707 billion to Latin America's GDP by 2030, with nearly \$19.3 billion alone coming from cloud-enabled AI.



## Key barriers are preventing Mexican businesses from fully leveraging AI

Critical barriers are holding back Mexican businesses of all sizes and sectors from adopting AI. If left unaddressed, these obstacles risk slowing Mexico's progress:

### 1. Skills

Businesses across Mexico identify the digital skills gap as a crucial challenge to their AI adoption. A lack of skills was the highest reported barrier, with **55%** of businesses saying it prevents them from adopting or expanding their AI use.

### 2. Increasing compliance costs

Mexican businesses are held back by compliance costs, estimating that \$17 out of every \$100 they spend on tech goes towards compliance-related costs.

While this is currently less than half of the EU average of \$40, **67%** of Mexican businesses expect these compliance costs to increase further in the next 3 years.

### 3. Perceived costs

**34%** of Mexican businesses cite perceived upfront costs as a key barrier to AI adoption. Interestingly, **45%** of businesses say they need a clearer understanding of AI's return on investment. Yet, among businesses that have adopted the technology, **83%** have seen a significant increase in revenue from AI, reporting an average revenue growth of **16%** revenue growth.

Through its [AWS Mexico \(Central\) Region](#), AWS is committed to supporting industries and businesses of all sizes across Mexico to overcome these barriers and unlock their digital and AI potential. AWS is investing more than \$5 billion in Mexico over 15 years. This AWS Region will provide customers with advanced and secure cloud technologies, including cutting-edge artificial intelligence (AI) and machine learning (ML) capabilities with purpose-built processors, while supporting Mexico's growing digital economy. With this effort, AWS will support an average of more than 7,000 full-time equivalent jobs annually in Mexico, adding more than \$10 billion to Mexico's gross domestic product (GDP). Amazon also launched the \$300,000 Amazon Queretaro Community Fund to help local groups, schools, and organizations initiate new community projects.



## Case Study: How Konfío is using AWS to empower Mexico's SMEs and drive growth

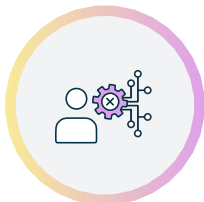


[Konfío](#) was created with the goal of helping small and medium-sized Mexican businesses grow. Its mission is to enable SMEs to focus on growing their businesses and not necessarily on how to raise capital or funding for expansion. To this end, Konfío faced the challenge of offering services in a more attractive way than those offered to SMBs by traditional banks. From the outset, Konfío decided to leverage AWS technology, and, 10 years ago, began operations and quickly became one of the first Mexican unicorns.

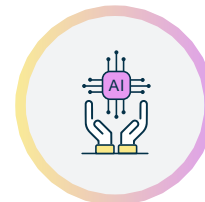
To date, they have benefited more than 85,000 companies throughout the country by providing them with productive loans, business credit cards, and point-of-sale systems. Konfío's collaboration with AWS has helped them to provide better solutions to their customers with the best cost-performance ratio.

### A deep dive: Digital skills gap is the most critical barrier

Among these challenges, the lack of AI and digital skills stands out as the single most urgent and systemic issue. It is the most frequently cited barrier to adoption, with **55%** of businesses reporting it prevents them from adopting or expanding their use of AI. The shortage of skilled AI talent is directly constraining Mexico's ability to turn AI ambition into implementation.



A shortage of AI talent is holding businesses back – only **19%** report having a strong AI skillset, while **40%** struggle to find local talent with the necessary expertise.



With AI literacy expected by these businesses to be required in **45%** of new jobs within three years, bridging this gap is critical for Mexico's economic future.

Recognising the urgency, a segment of Mexican businesses are addressing the skills gap through training and investment:



Companies are offering financial incentives to attract top talent – businesses say they are willing to offer, on average, a **34%** salary premium for candidates with strong digital skills.



Over one in ten are now upskilling their workforce – **15%** have already implemented AI-specific training programs.

The availability of training is making AI more accessible. **52%** of businesses believe that widespread AI training initiatives are helping drive adoption.

To support the bridging of this gap, AWS [has committed](#) to upskill Mexico's next generation of digital talent and empower individuals with cloud expertise and Gen AI to unlock new career paths and propel organisational digital transformation. By investing in comprehensive cloud training, AWS cultivates a skilled workforce to spearhead innovation and growth in Mexico's digital economy. Since 2017, AWS has trained more than 500,000 individuals in Mexico in cloud skills and plans to offer cloud and generative AI upskilling to an additional 200,000 individuals by the end of 2026.



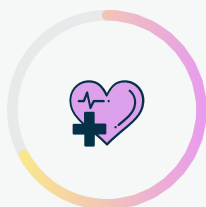
## Unlock the full potential of AI through four crucial actions

Mexico has the right tools and ambition to lead in AI. AWS urges policymakers and industry leaders to take action to unlock AI's full potential across both start-ups and larger enterprises:

### 1. Increase adoption of AI across industries and sectors.

To do this, the Mexican government should introduce targeted measures that lower the cost and risk of experimentation. These include establishing regulatory sandboxes to allow safe and flexible testing of AI applications and creating AI-focused innovation grants for startups to support research, development, and deployment. By encouraging businesses to explore and pilot AI tools, Mexico can foster a broader culture of innovation and digital experimentation. These early AI adopters, supported by a predictable regulatory environment, can then transition from short-term experimenters to long-term AI users, embedding the technology into their operations, products, and services. Over time, this strategy will help build a stronger, more resilient AI ecosystem, contribute to productivity, ensuring the benefits of AI adoption are widely distributed across industries and regions.

Public sector adoption should also be a focus. Citizens believe that the government should prioritise digital transformation in:



Healthcare (**67%** of citizens)

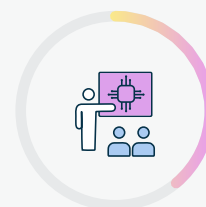


Education (**57%** of citizens)

Both of which are seen as the top citizen priorities, closely followed by:



Emergency and disaster response (**46%**)



Digital skills training (**39%**)

The government can also use public procurement to drive innovation, create test-beds and cross-border exploratory projects using AI to deliver new services. **52%** of Mexican businesses say they are more likely to increase their adoption of AI when the public sector leads, while **60%** of startups say that increased public sector adoption of new technologies are crucial for their ability to scale. Investing directly in public sector AI adoption can improve outcomes for citizens, relieve strain on public sector workers, and stimulate demand for AI services.





## 2. Accelerate digital adoption through boosted skills efforts and broader access to the cloud's AI tooling layer:

Only **24%** of businesses feel prepared to adopt AI, yet **50%** identify AI skills as critical, build sector-specific skills academies in partnership with industry and universities, and incentivise upskilling through offering tax credits for AI training or subsidized digital apprenticeships.

Mexico's government should promote a more diffusion-focused strategy expanding access to the tooling layer of the cloud stack, which is what most businesses will use to build and run AI applications.

## 3. Take steps to ease the burden of rising compliance costs:

Businesses in Mexico currently face rising compliance costs, spending **17%** of their tech spend on compliance. However, over two-thirds (**67%**) anticipate this figure to rise, acting as a barrier to increased AI adoption, which risks missing out on key opportunities for growth and innovation throughout Mexico. To mitigate this risk, it will be crucial to streamline processes and provide clearer, more efficient compliance pathways that reduce the burden on businesses.



Spending **17%** of their tech spend on compliance



Over two-thirds (**67%**) anticipate this figure to rise

## 4. Foster a strong startup ecosystem:

Startups represent great untapped potential in the nation. With the right support, Mexico's startups can drive innovation across sectors, export AI-based solutions globally, and drive growth across Mexico's economy. To support this aim, the government should expand national initiatives through creating regional AI hubs and incubators and offering great access to funding or grant programs for AI-enabled products.



## Conclusion

Mexico stands at a defining moment in its AI-driven digital transformation. With adoption rates surging and businesses recognising AI's potential to enhance productivity, innovation, and economic growth, the nation is positioning itself as a digital leader. However, to maintain this momentum and unlock AI's full potential, Mexican businesses must transition from experimentation to deep, strategic integration. With proactive policymaking, a commitment to fostering digital skills, and expanded support of its innovative startups, Mexico can bridge the two-tier AI economy and sustain long-term competitiveness.

The direction is clear, and the momentum is undeniable. By embracing AI across business functions in businesses of all sizes and accelerating digital transformation, Mexico can secure its place as a global AI leader, driving innovation, economic resilience, and shared prosperity in the years ahead.



# Appendix

## Methodology

The fieldwork for this study was undertaken by Strand Partners' research team for AWS. This research has followed the guidance set forth by the UK Market Research Society and ESOMAR. For the purposes of this study, business leaders are defined as founders, CEOs, or members of the C-suite in organisations.

'Citizens' are nationally representative members of the public based on the latest available census.

For inquiries regarding our methodology, please direct your questions to: [polling@strandpartners.com](mailto:polling@strandpartners.com).

## In Mexico:

- We conducted a survey targeting 1,000 businesses and 1,000 nationally representative members of the public.
- The survey of citizens has ensured representation based on age and gender.
- The survey of businesses is representative by business size and sector.

## Sampling:

Our sampling process used a mix of online panels that are recognised for their validity and reliability. These panels are carefully curated to ensure diverse representation across various demographics. For the business leaders, the panels are selected with a consideration for organisational size, sector, and position within the company. Our objective with the sampling strategy is to achieve an optimal mix that mirrors the actual distribution of our target populations in the respective markets.

## Weighting Techniques:

Post-data collection, we applied iterative proportional weight to correct any discrepancies or over-representations in the sample.

## Survey:

- Usage Patterns: This survey gauges the evolving patterns of digital technology usage. We are particularly interested in examining the adoption and implementation levels of technologies, focusing on cloud computing and artificial intelligence.
- Perceptions and Attitudes: The survey seeks to unearth the prevailing perceptions and attitudes towards digital technologies, understanding the perceived benefits, challenges, and potential ramifications of both present and emerging tech solutions.
- Barriers and Opportunities: The survey scrutinises the predicted challenges and potential avenues that both businesses and individuals anticipate on their digital trajectory. This involves pinpointing challenges, from skill deficits to regulatory complications, and recognising opportunities for growth, innovation, and market development.
- 'Size of the Prize': The survey shed light on the economic repercussions and growth prospects linked with digital transformation. By elucidating the 'size of the prize', we aspire to stress the importance of digital transformation and foster further investments and technology adoption.

## References

1. "Adopted AI" or "consistently use AI": a business that consistently uses at least one AI tool. This would not include businesses that experimented with AI once or twice, or ran a temporary pilot programme, for instance.
2. Calculated based on recent estimates for the total number of businesses in Mexico, which in 2023, El Instituto Nacional de Estadística y Geografía [estimated to be around 5.5 million](#)
3. A startup is a business founded in the last 2 years which provides a new product/service or innovation and is aiming for rapid growth in terms of employees and turnover.
4. A large enterprise is a business with 500 or more employees, founded 10 years ago or more.