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BCG AI AT WORK

# Momentum Builds, But Gaps Remain
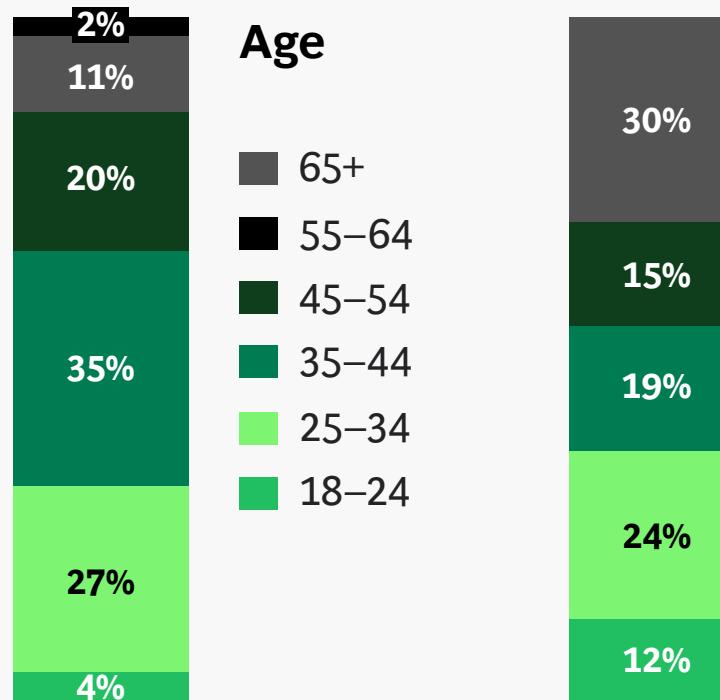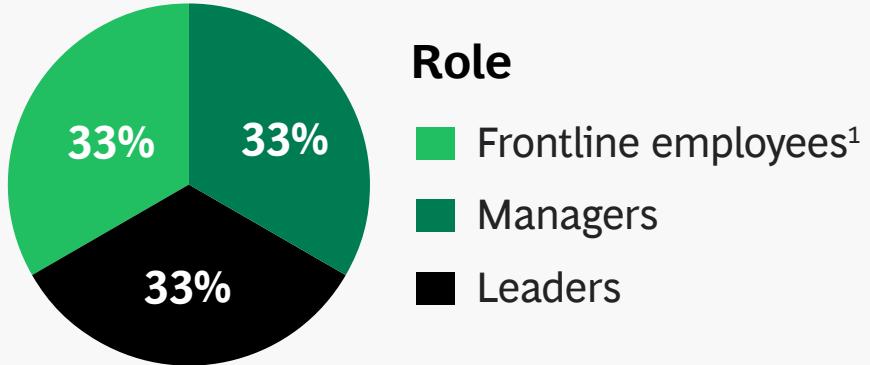
Survey parameters

10,635 respondents
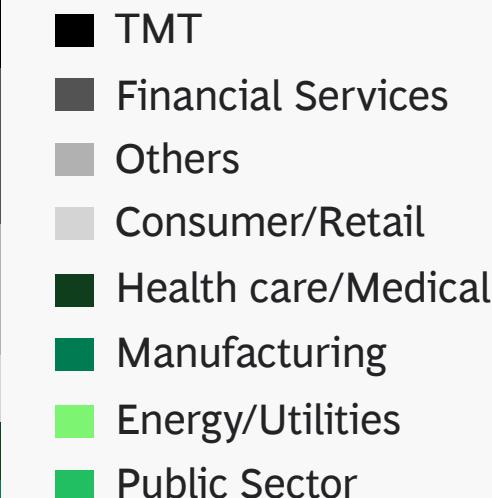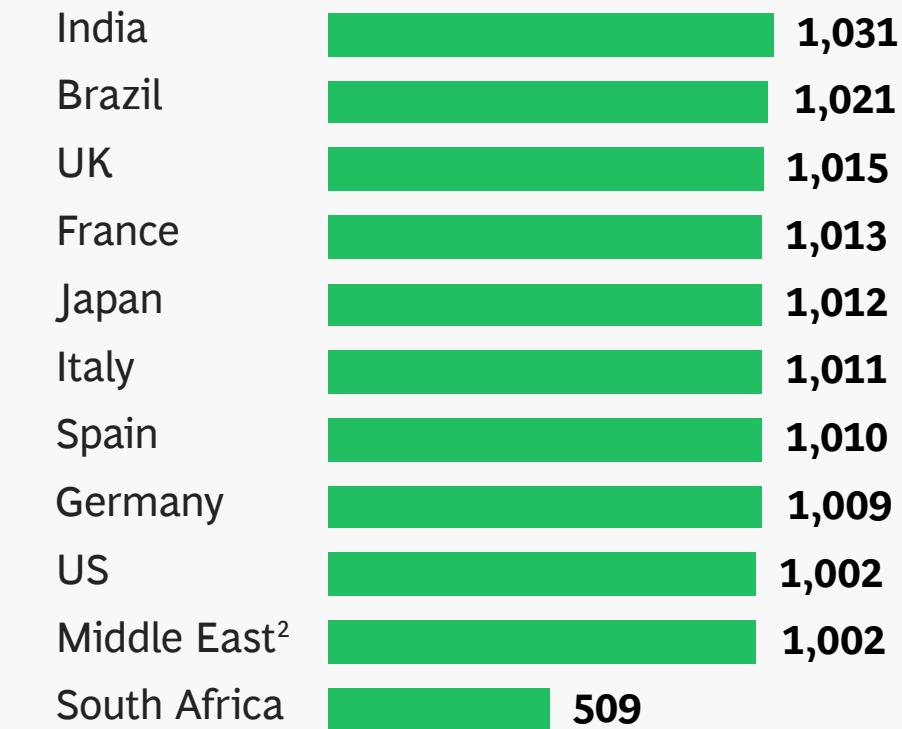
Role

- Frontline employees[1] — 33%
- Managers — 33%
- Leaders — 33%

Age

%	Age group
2%	65+
11%	55–64
20%	45–54
35%	35–44
27%	25–34
4%	18–24

Company revenue

%	Revenue
30%	>$5B
15%	$2B–$5B
19%	$1B–$2B
24%	$500M–$1B
12%	<$500M

Industry

%	Industry
23%	TMT
22%	Financial Services
20%	Others
10%	Consumer/Retail
8%	Health care/Medical
8%	Manufacturing
5%	Energy/Utilities
4%	Public Sector

Key markets

Market	Respondents
India	1,031
Brazil	1,021
UK	1,015
France	1,013
Japan	1,012
Italy	1,011
Spain	1,010
Germany	1,009
US	1,002
Middle East[2]	1,002
South Africa	509

Five key takeaways

1
AI is now part of our daily work lives. While 72% of all respondents are regular AI users, adoption among frontline employees has stalled at 51%.

2
Proper training, leadership support, and access to the right tools can break this ceiling. Yet only 36% of employees are satisfied with their AI training.

3
The Global South is again showing higher adoption of AI. India is leading the pack with 92% of regular users.
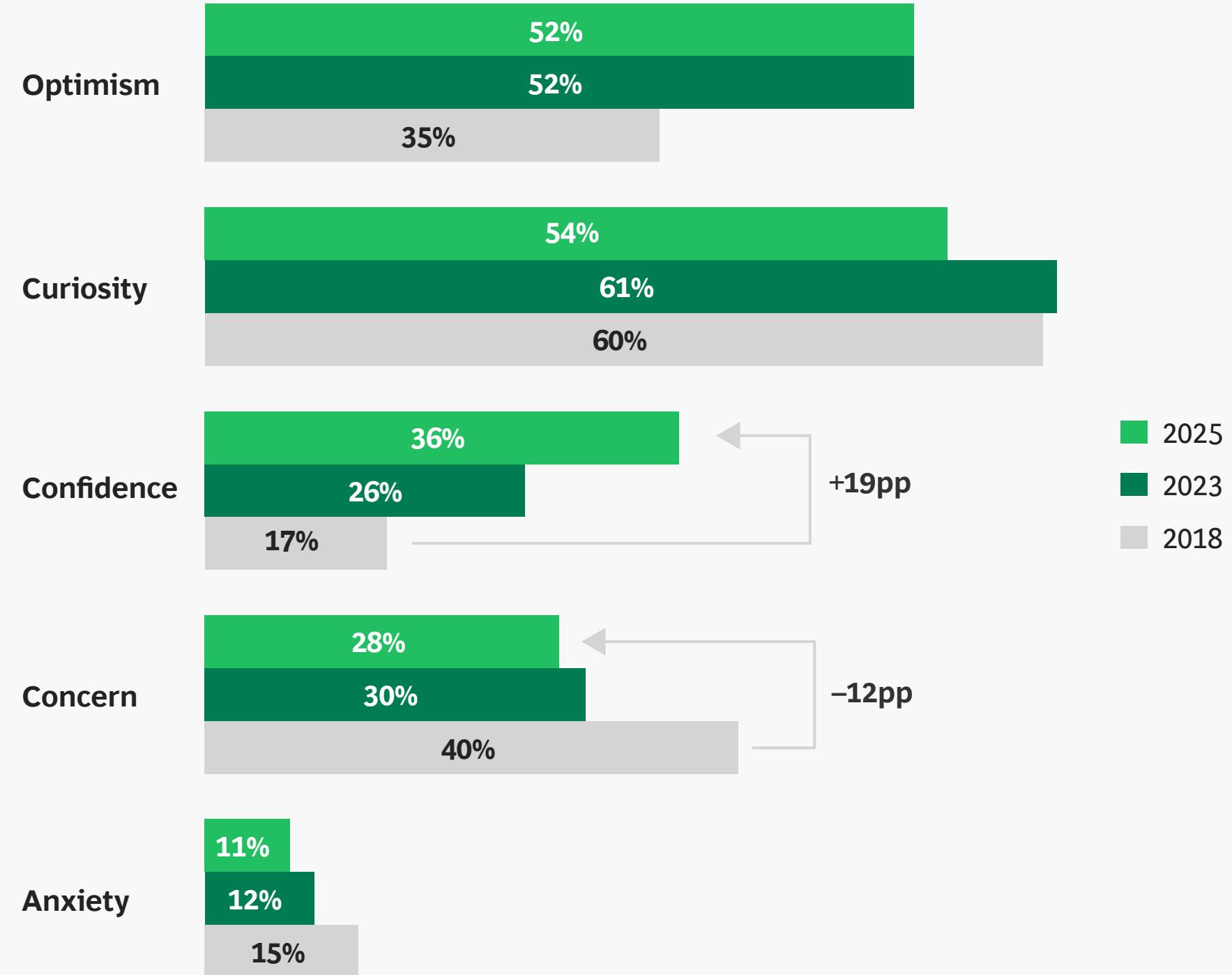
4
The next frontier: from adoption to value with end-to-end redesign. One-half of respondents say their company is starting to reshape processes. These companies invest more in their people—and it pays off.

5
AI agents are not widely deployed. In practice, only 13% see agents integrated into broader workflows.

AI is now part of our daily
work life—but frontline employees
have hit an adoption ceiling

As AI goes mainstream, confidence is rising and concerns are falling
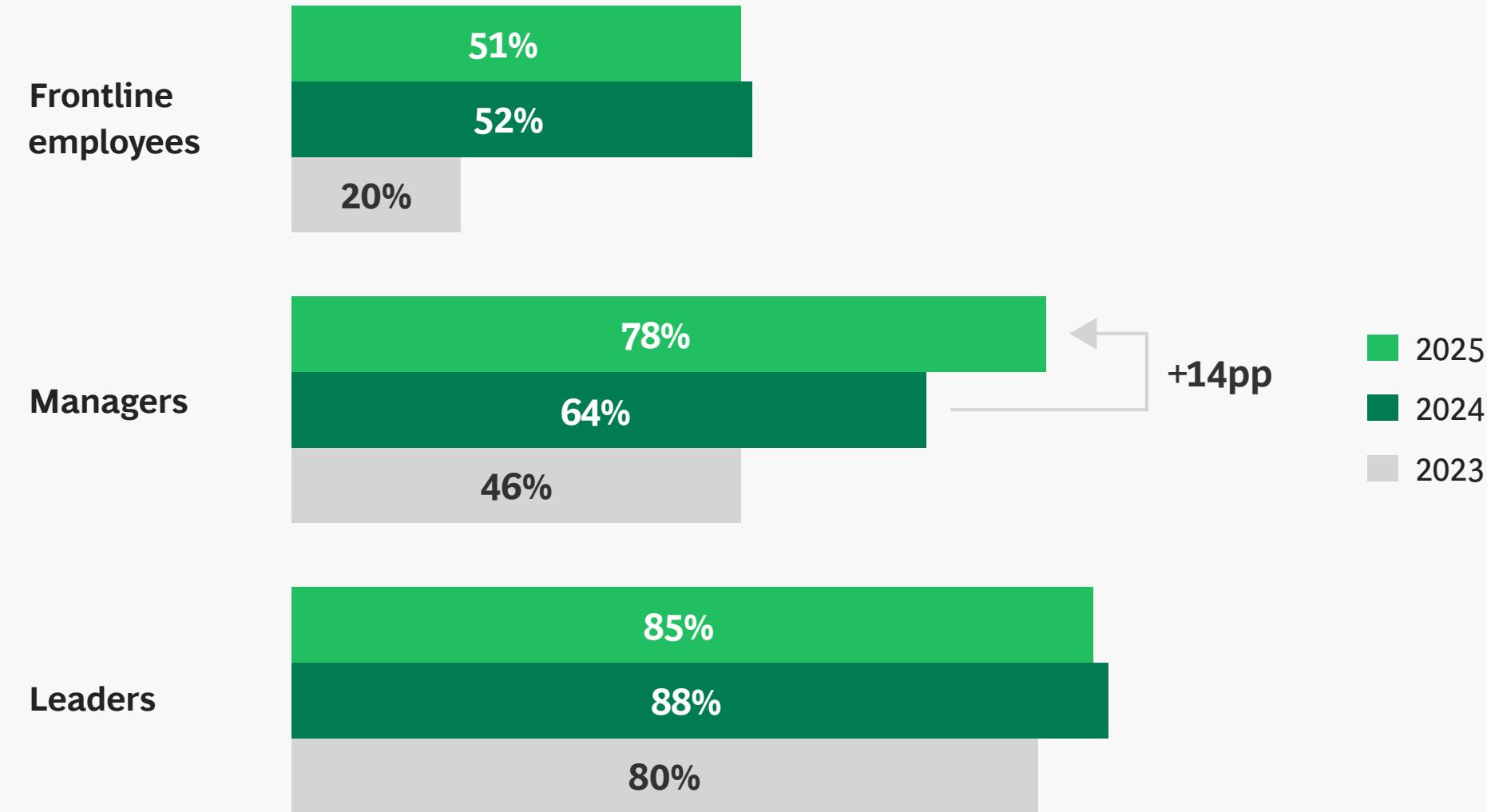
Optimism
- 2025: 52%
- 2023: 52%
- 2018: 35%

Curiosity
- 2025: 54%
- 2023: 61%
- 2018: 60%

Confidence
- 2025: 36%
- 2023: 26%
- 2018: 17%

+19pp

Concern
- 2025: 28%
- 2023: 30%
- 2018: 40%

−12pp

Anxiety
- 2025: 11%
- 2023: 12%
- 2018: 15%

Legend:
- 2025
- 2023
- 2018

Overall adoption is strong—72% of respondents are regular users—but it has stalled for frontline employees
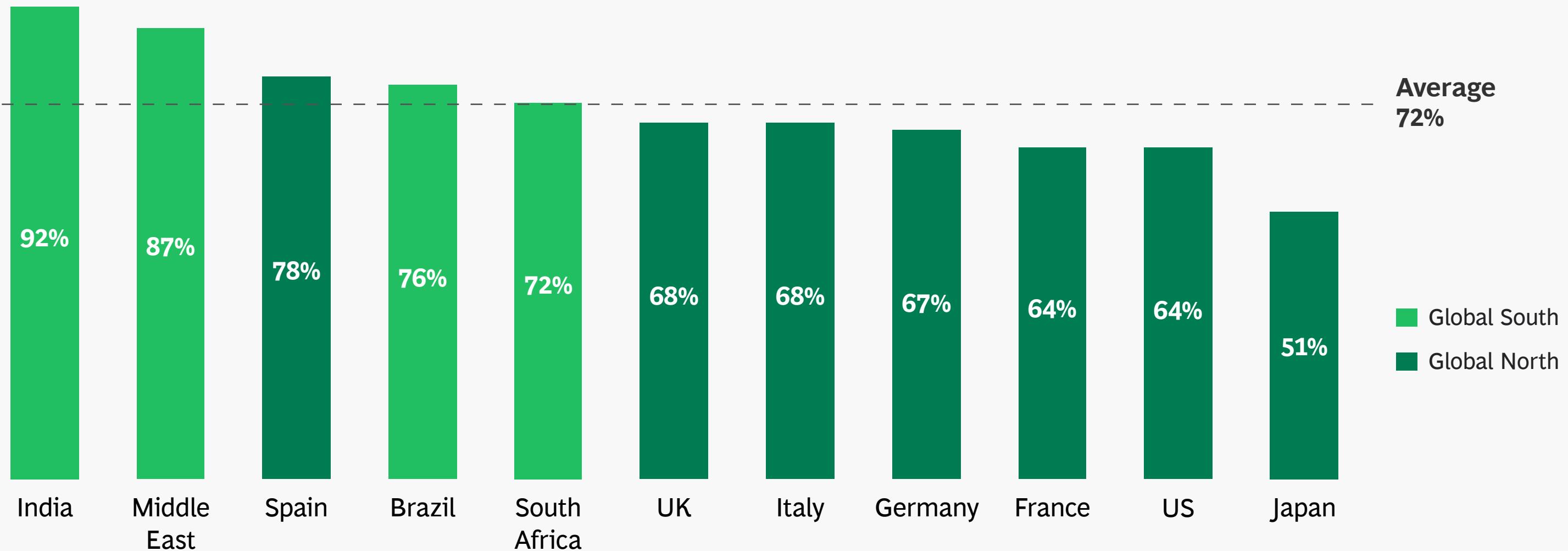
Regular GenAI usage across worker levels

Frontline employees
- 51% (2025)
- 52% (2024)
- 20% (2023)

Managers
- 78% (2025) ← +14pp
- 64% (2024)
- 46% (2023)

Leaders
- 85% (2025)
- 88% (2024)
- 80% (2023)

■ 2025
■ 2024
■ 2023

Employees in the Global South show higher adoption of AI tools

Share of respondents who use AI at least several times a week

India	Middle East	Spain	Brazil	South Africa	UK	Italy	Germany	France	US	Japan
92%	87%	78%	76%	72%	68%	68%	67%	64%	64%	51%

Average 72%

Legend: Global South, Global North
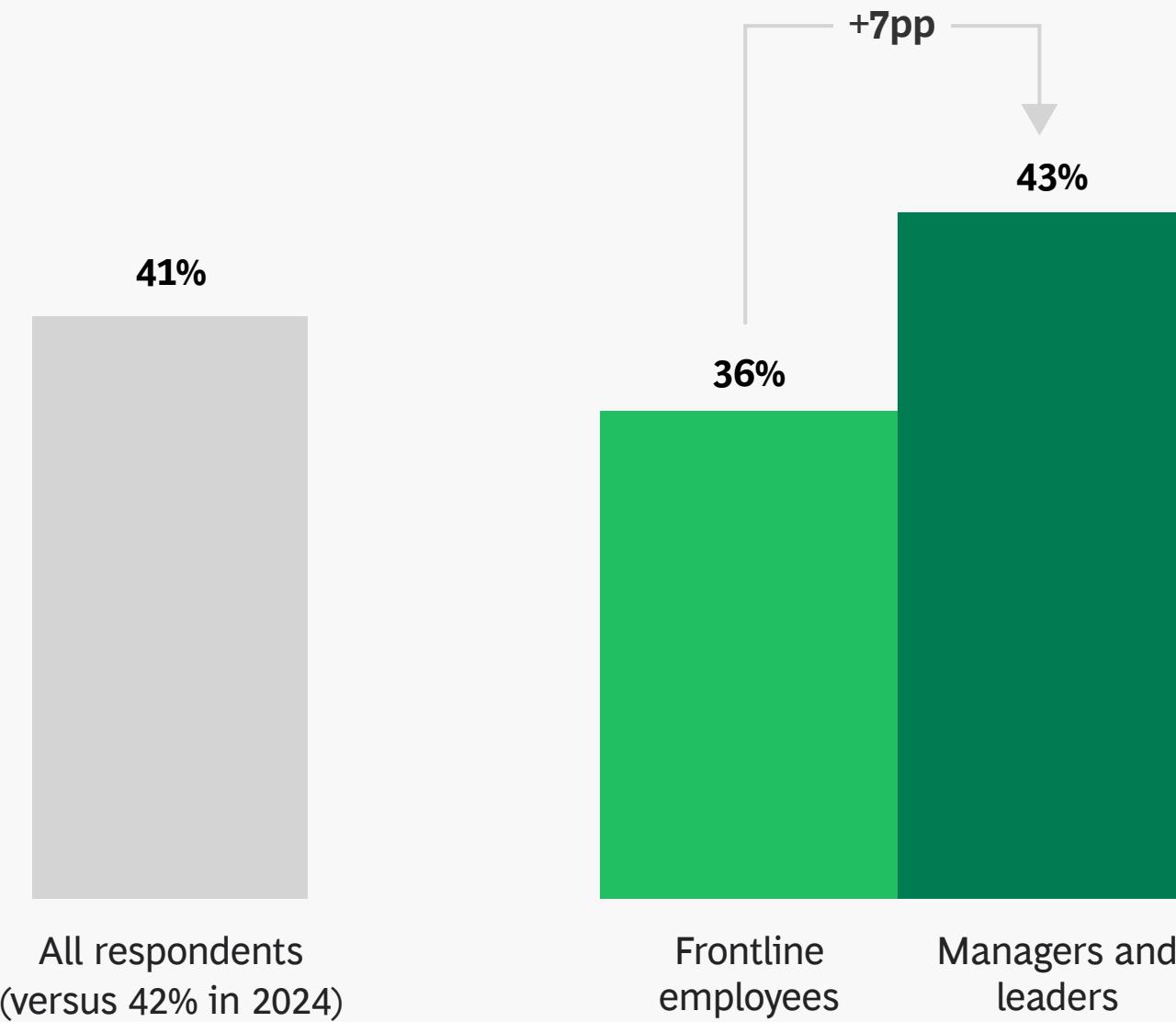
41%

of respondents fear losing their job

Share of respondents who think their job will certainly or probably disappear entirely in the next ten years

41%

All respondents
(versus 42% in 2024)

36%

Frontline
employees

+7pp

43%

Managers and
leaders
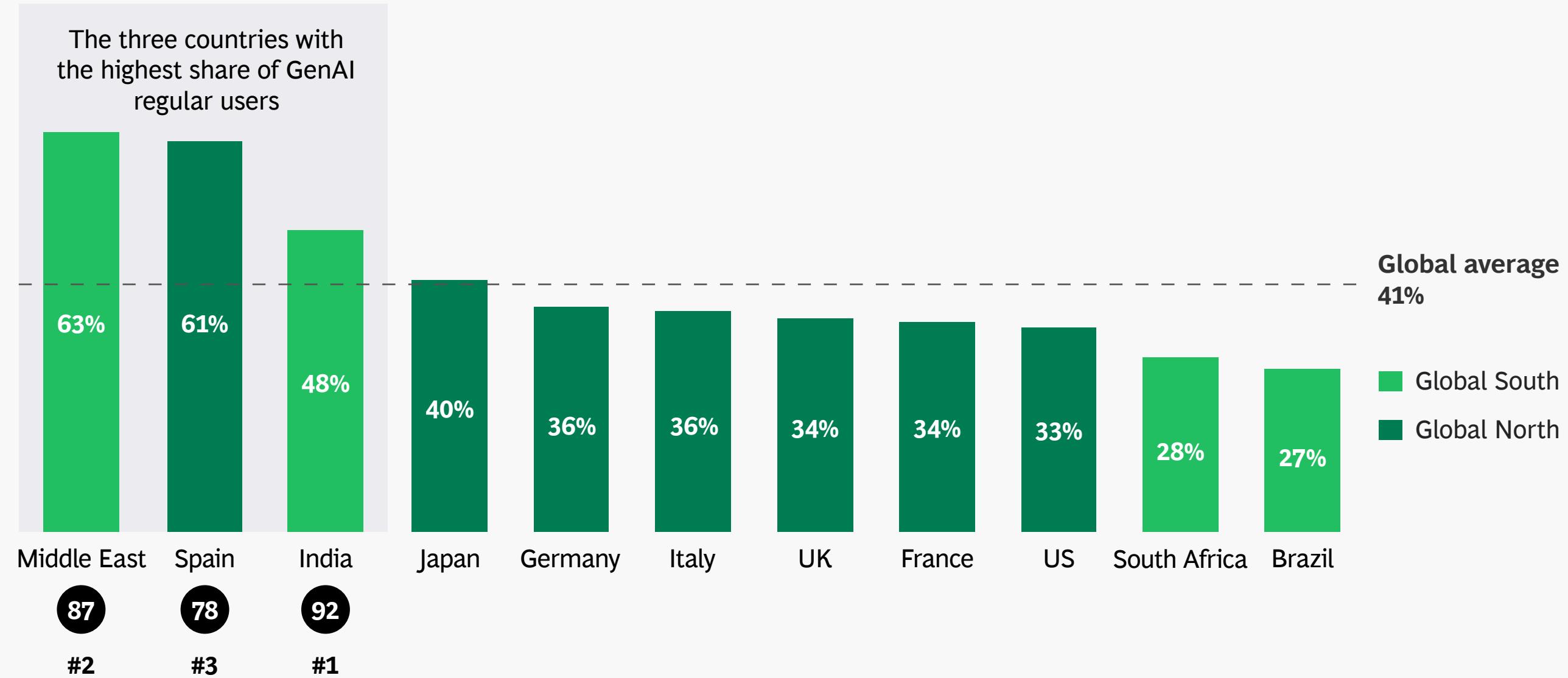
Countries with high usage also have highest fear of job loss

Share of respondents who think their job will certainly or probably disappear entirely in the next ten years

The three countries with the highest share of GenAI regular users

	Middle East	Spain	India	Japan	Germany	Italy	UK	France	US	South Africa	Brazil
Share	63%	61%	48%	40%	36%	36%	34%	34%	33%	28%	27%
Regular user %	87	78	92								
Regular user rank	#2	#3	#1								

Global average 41%

Global South
Global North

47%
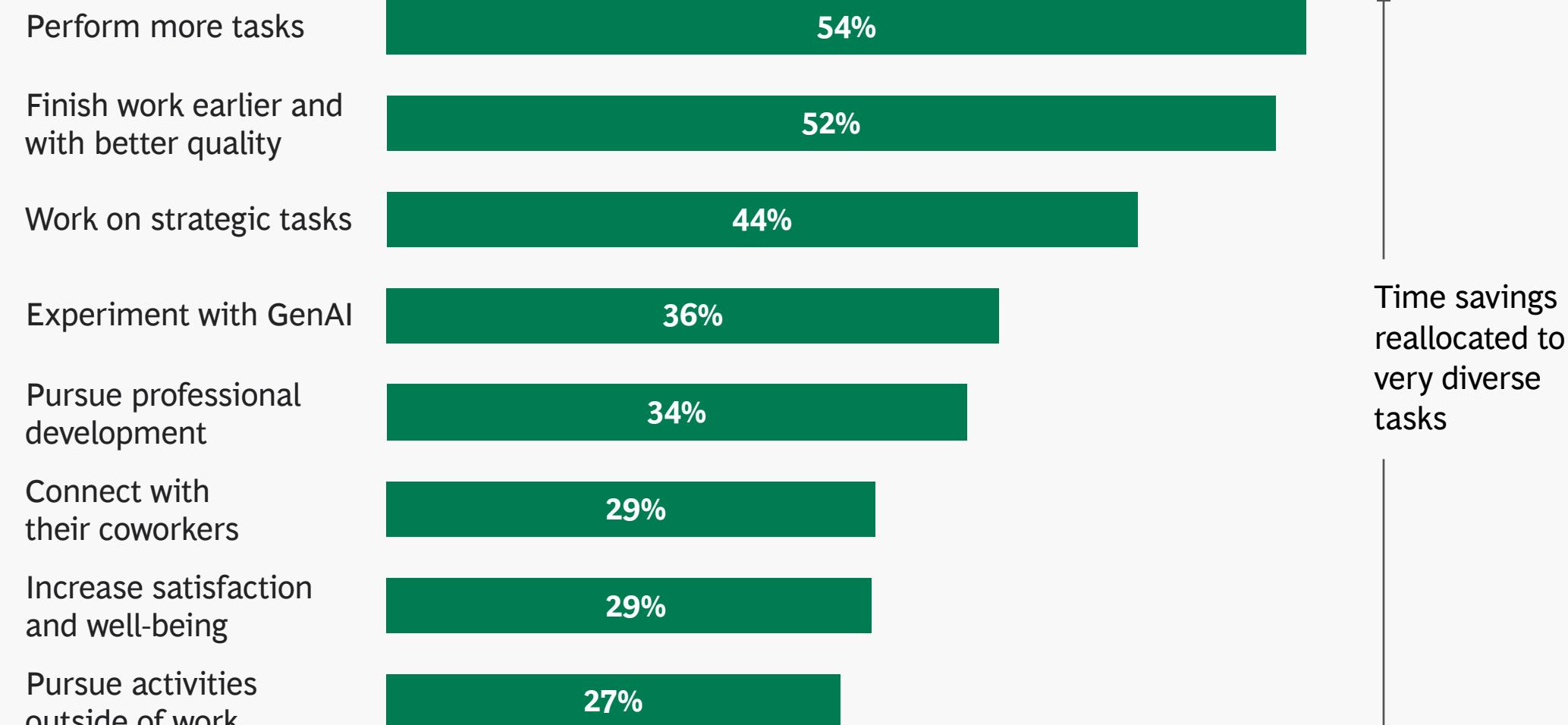
of respondents say they save more than an hour a day with AI[1]

Only one-third receives guidance on how to reallocate this time, muting the impact

Share of respondents who report doing these activities with the time saved by GenAI

Activity	Share
Perform more tasks	54%
Finish work earlier and with better quality	52%
Work on strategic tasks	44%
Experiment with GenAI	36%
Pursue professional development	34%
Connect with their coworkers	29%
Increase satisfaction and well-being	29%
Pursue activities outside of work	27%

Time savings reallocated to very diverse tasks

Proper training, access to the right tools, and strong leadership support–the three keys to improve AI adoption
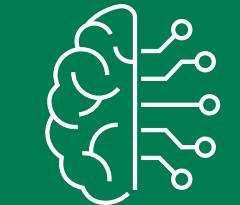
# Top three challenges to boost adoption

Lack of skills or training

Training is often too short or superficial — only 36% of employees say they have been trained on the skills needed for AI transformation.

Limited access to the right tools

Nearly four in ten employees, 37%, say their company is not supplying the right tools. When corporate solutions fall short, 54% say they would use unauthorized AI tools, raising security risks.

Lack of support from leadership

Only 25% of frontline employees say they have received sufficient support from their leadership on how and when to use AI at work.
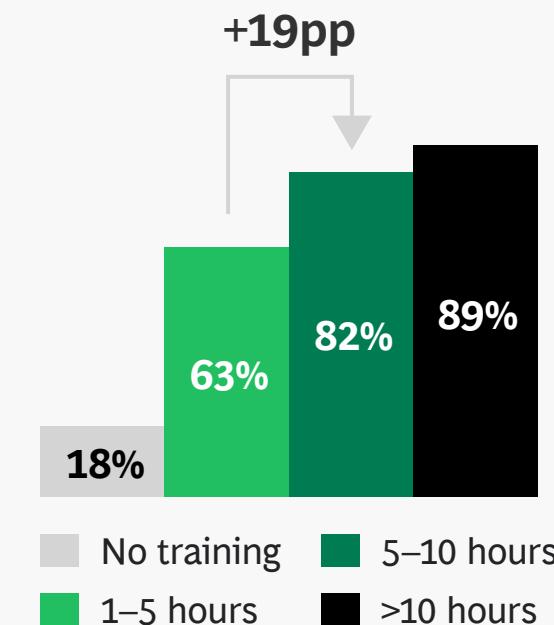
Only 36% of employees feel properly trained

36%

Share of respondents saying, "Yes, my training was enough."

At least five hours of instruction, in-person sessions, and coaching are key components of effective training
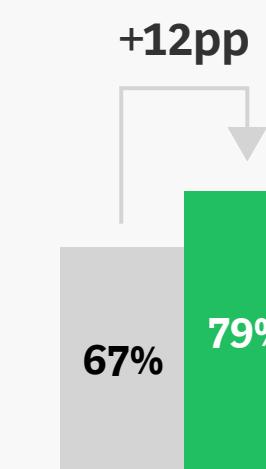
At least five hours
% of regular users[1] depending on training volume

+19pp

| 18% | 63% | 82% | 89% |

No training
1–5 hours
5–10 hours
>10 hours
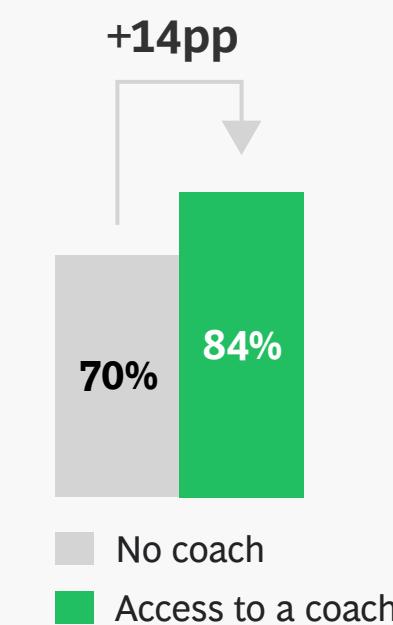
In-person
% of regular users depending on in-person training or not

+12pp

| 67% | 79% |

Not in-person training
In-person training

Coaching
% of regular users depending on coach access

+14pp

| 70% | 84% |

No coach
Access to a coach

These three components also significantly boost employees' confidence in AI and improve the quality of AI-enabled work outputs
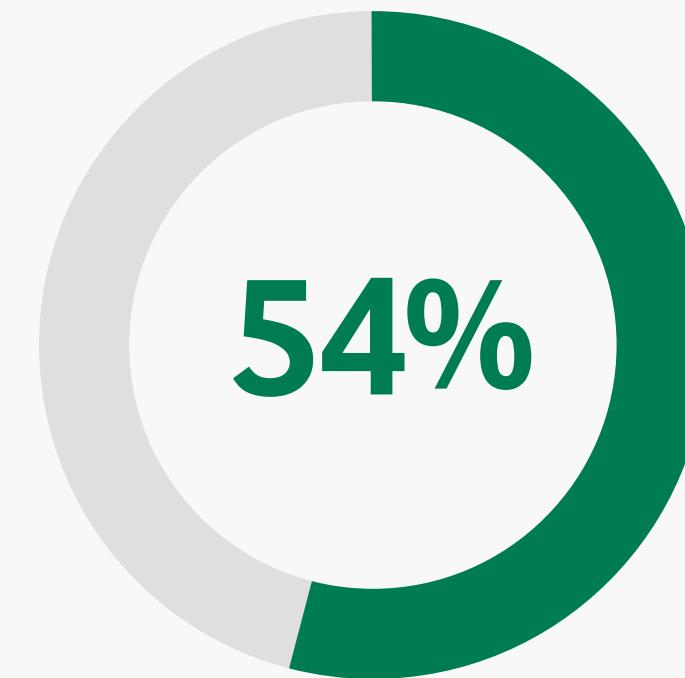
Sources: AI at Work, 2025 (n=10,635); BCG analysis.
Note: How to read the chart: 79% of respondents who received more than five hours of training are regular AI users, compared with 67% of those who received less than five hours training.
[1]Used AI every day or several days a week.

Without the right tools, companies face rising shadow AI usage—and the accompanying security risks

Share of respondents who would use AI tools even if not authorized by the company

GenZ and Millennials are most likely to bypass restrictions

54%

GenZ and Millennials[1]   62%

+19pp

Others[2]   43%

■ Would use AI without company support   ■ Would wait or not use AI

Sources: AI at Work, 2025 (n=10,635); BCG analysis.
Note: Shadow AI refers to the use of artificial intelligence tools, systems, or models within an organization without the explicit knowledge, approval, or governance of the central IT or data teams. GenZ is defined as people born 1997 to 2012. Millennials is defined as people born 1981 to 1996.
[1]n=7039. [2]n=3596.

Leadership support matters—but only

25%

of frontline employees experience it

Share of employees who are…

…Regular users of AI
- 82% (With clear leadership support)
- 41% (Without clear leadership support)
- +41pp

…Very positive about GenAI impact on job enjoyment
- 55%
- 15%
- +40pp

…Very positive about GenAI impact on their career prospects
- 62%
- 13%
- +47pp
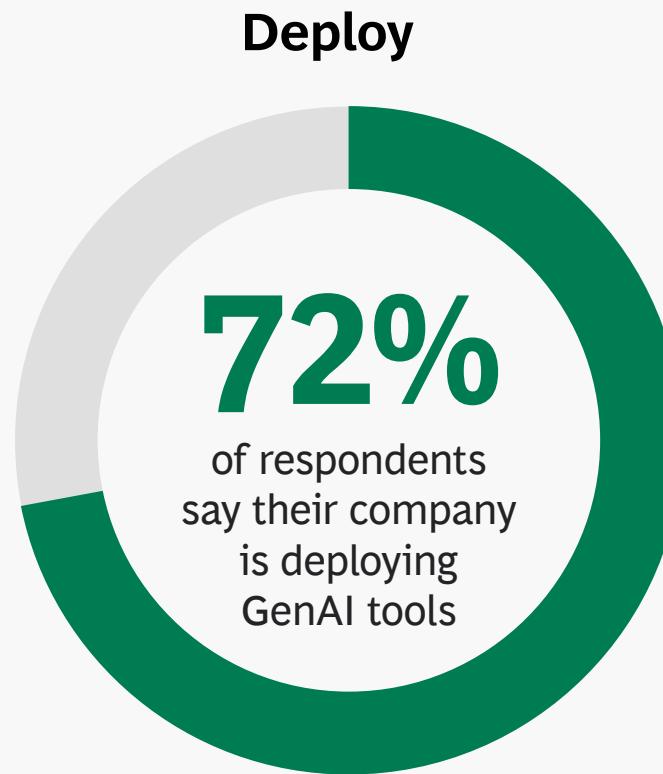
Legend:
- With clear leadership support on GenAI use
- Without clear leadership support on GenAI use
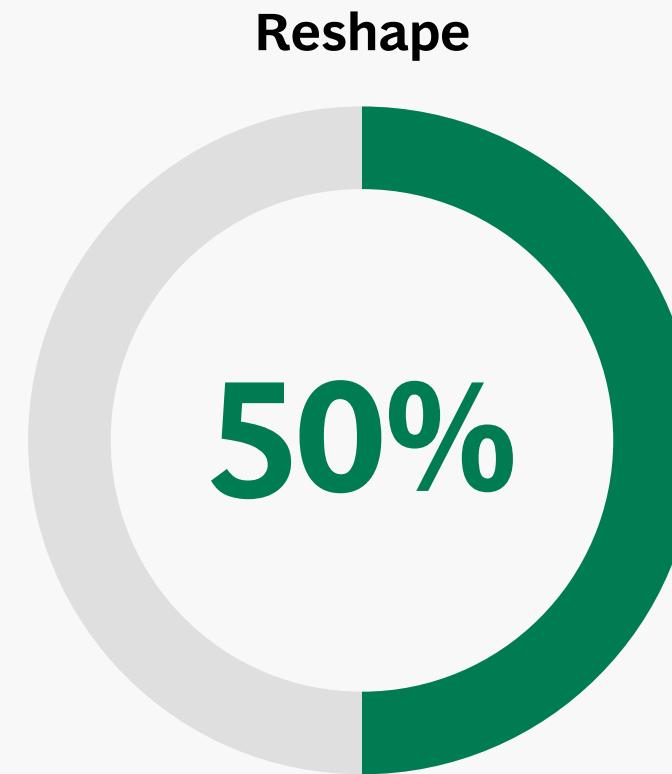
Sources: AI at Work, 2025 (n=3,537 frontline employees); BCG analysis.
Note: Regular users of AI = people that use AI daily or several times a week.

The next frontier: from adoption to value through reshaping workflows and functions with AI
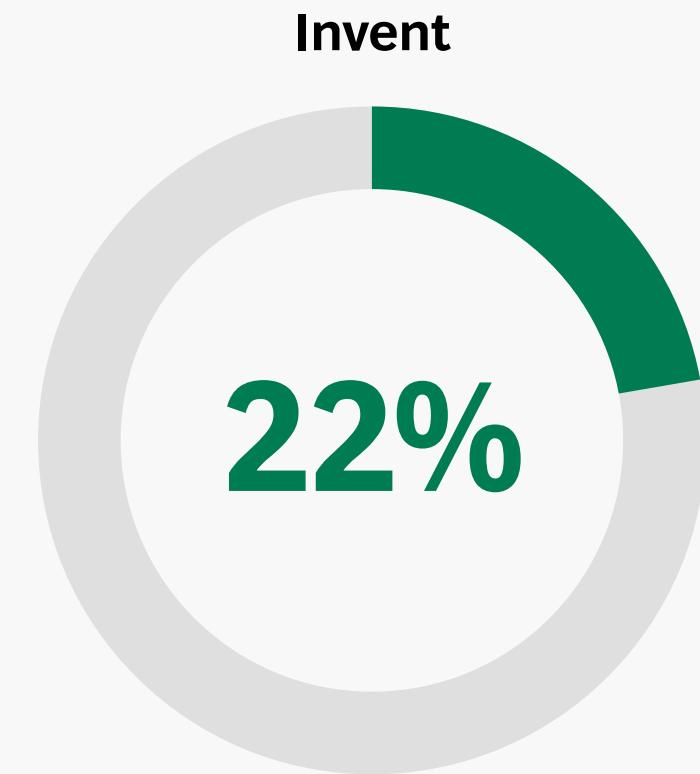
Half of respondents say their company is redesigning end-to-end workflows

Deploy

72%
of respondents say their company is deploying GenAI tools

Support adoption of GenAI tools and foster productivity (e.g., rolling out ChatGPT, Microsoft Copilot, or Mistral LeChat)

Reshape

50%
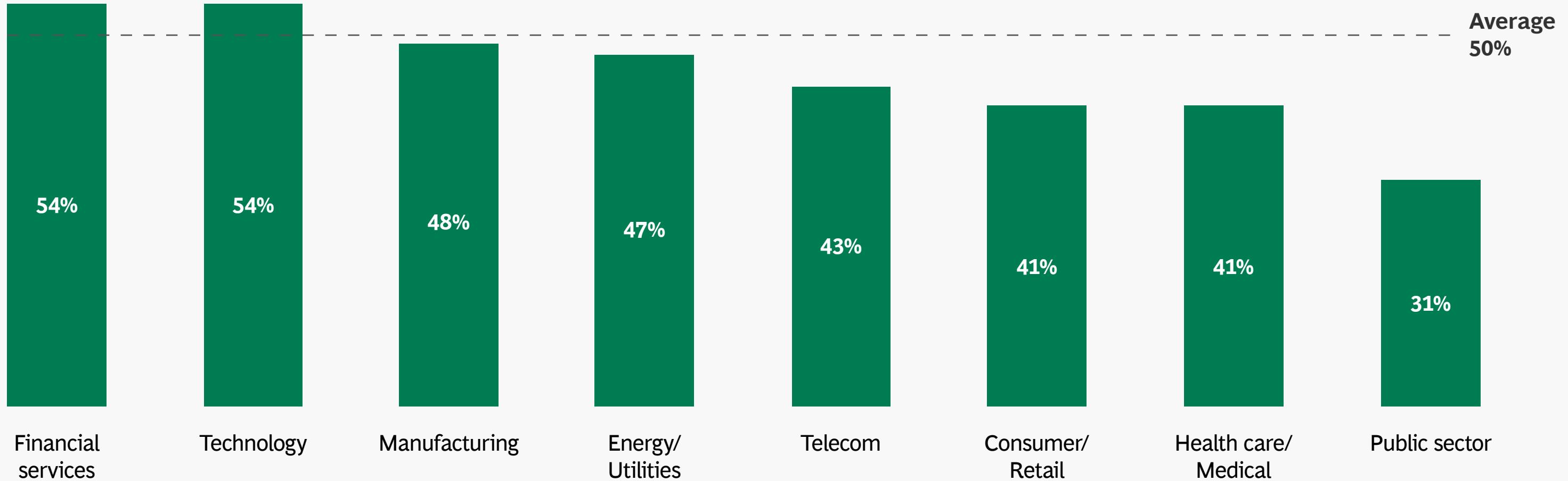
Redesign end-to-end workflows and processes to reimagine functions (e.g., reshaping the HR function by injecting AI into critical processes)

Invent

22%

Build and innovate new business models and products to drive growth (e.g., creating new revenue streams with AI-powered services)

According to BCG studies, companies that create the most value with AI focus 80% of their investment on Reshape and Invent, in a few core processes

Financial services and tech are leading the pack on workflow redesign

Share of respondents who report their company is doing workflow redesign (Reshape) among industries
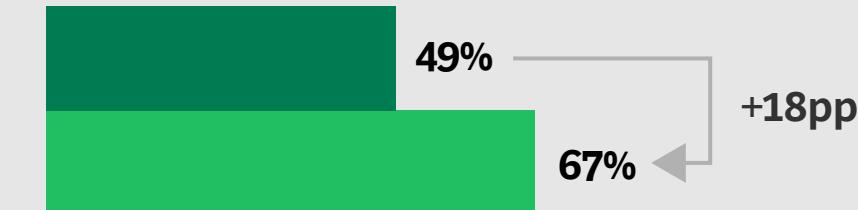

Average 50%

Financial services	Technology	Manufacturing	Energy/Utilities	Telecom	Consumer/Retail	Health care/Medical	Public sector
54%	54%	48%	47%	43%	41%	41%	31%
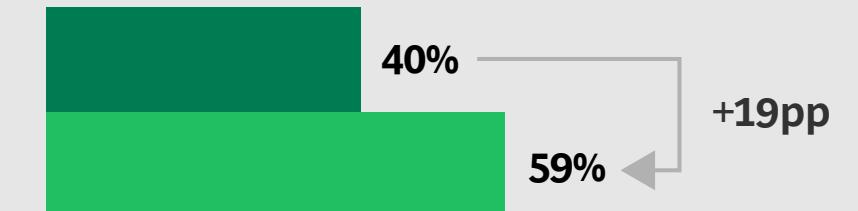
Companies redesigning their workflows invest more in the people transformation–and it pays off

## Companies reshaping their workflows and functions with AI…
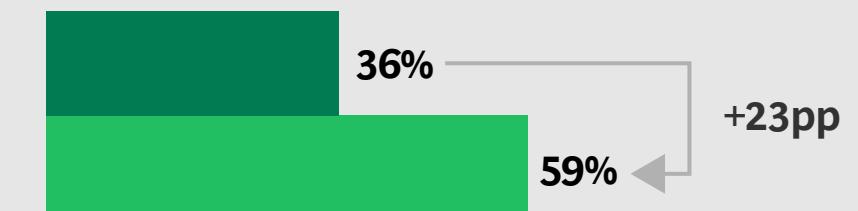
Offer proper training
Share who received more than five hours of upskilling

49%
67%
+18pp

Provide more support
Share who had strong leadership support

40%
59%
+19pp
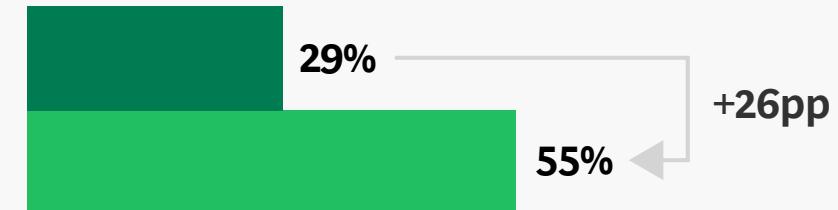
Track AI value better
Share who see value created by AI in terms of financial outcomes properly tracked

36%
59%
+23pp
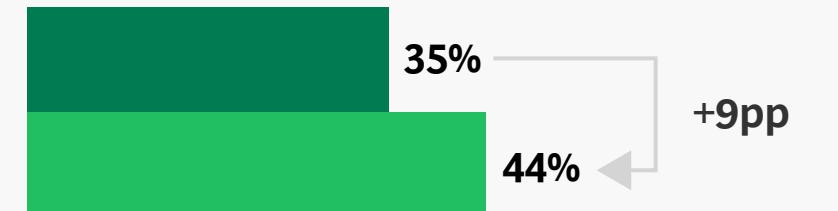
As a result, their employees…
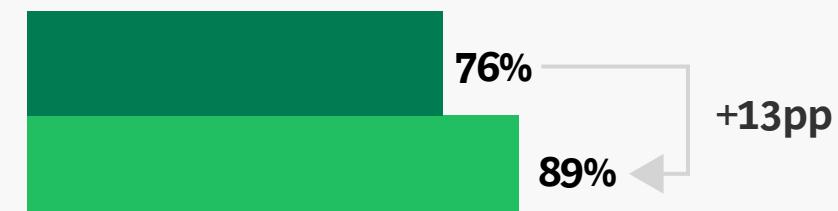
Save more time
Share who save more than one hour per day

29%
55%
+26pp

Shift to strategic tasks
Share who ranked this a top three impact of GenAI

35%
44%
+9pp

Think AI enables better decisions
Share who think their company will make better decisions thanks to data

76%
89%
+13pp

■ Employees in companies focusing on AI tools roll-out only[1]　　■ Employees in companies redesigning workflows[2]
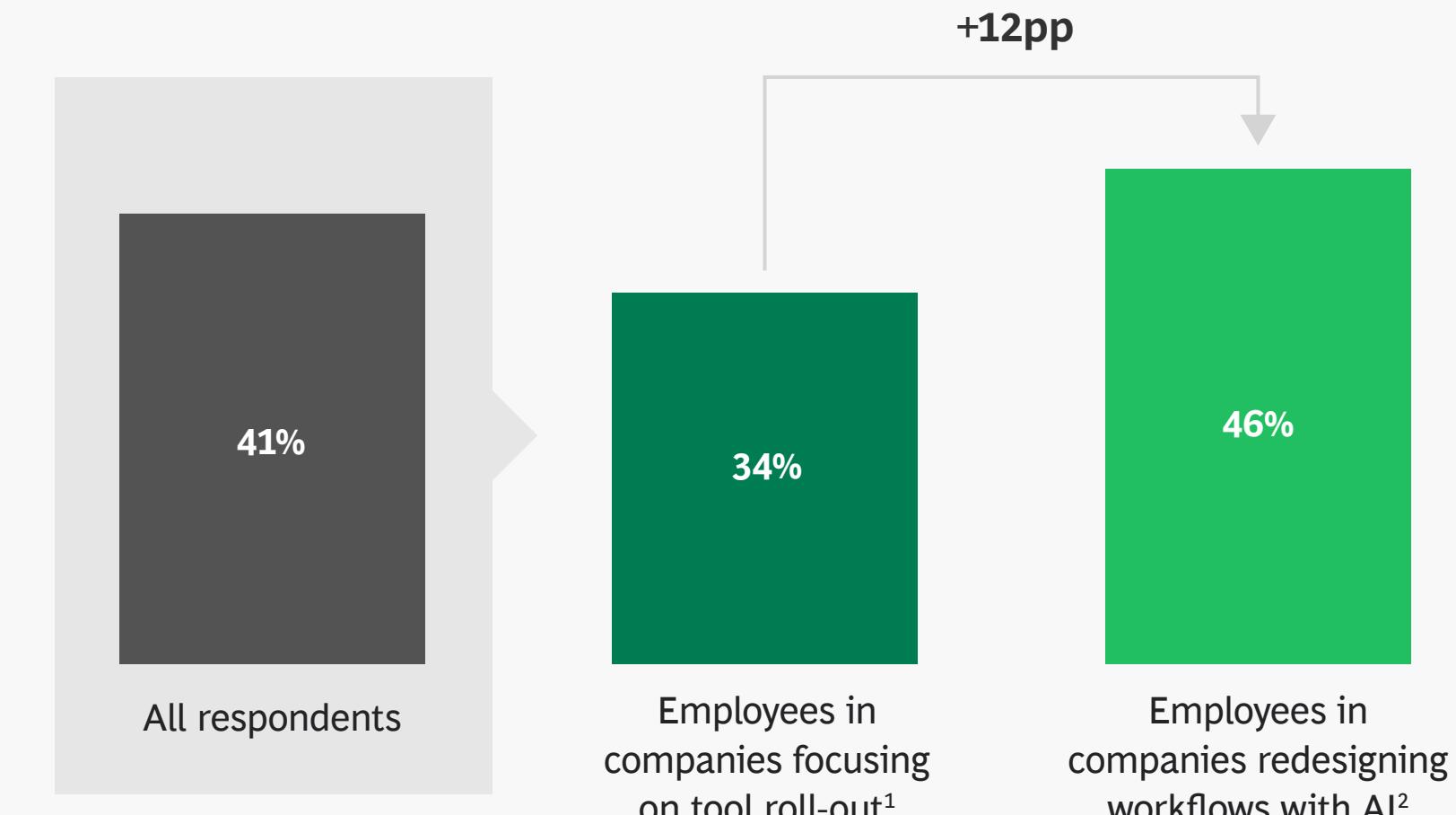
Employees in companies reshaping their workflows feel most vulnerable to job loss—reinforcing the need for clear communication and proper upskilling

Share of respondents who think their job will certainly or probably disappear entirely in the next ten years

+12pp

41%
All respondents

34%
Employees in companies focusing on tool roll-out[1]

46%
Employees in companies redesigning workflows with AI[2]

AI agents: full of promises, but not widely deployed

Still early days for AI agents: Only 13% see them in the workflows

Employees see potential, but don't fully understand AI agents

77% think AI agents will be important in the next three to five years

But
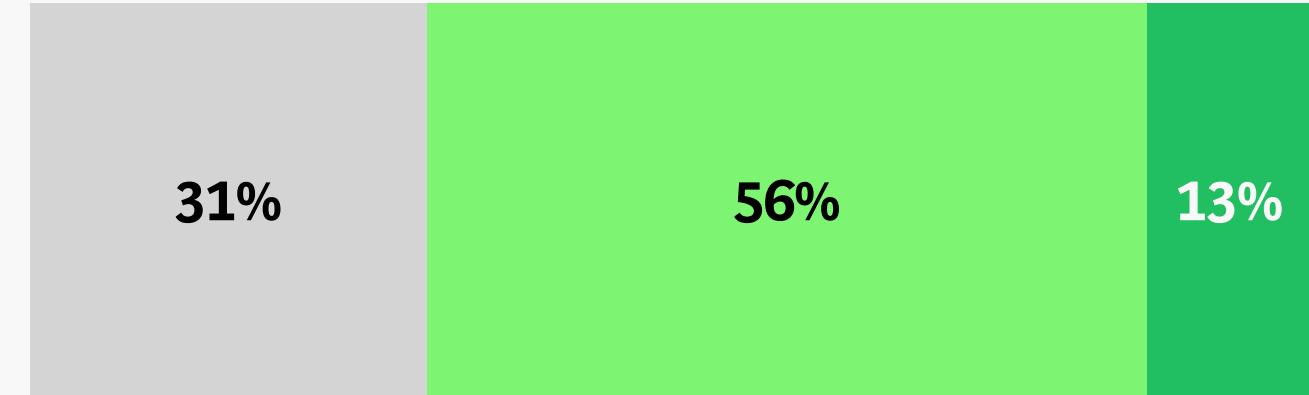
33% have a proper understanding of what they are

Most companies are still experimenting

Share of respondents who say AI agents are:

31%	56%	13%

- Not deployed yet[1]
- Being used experimentally, in pilots, or under human supervision
- Integrated into broader workflows
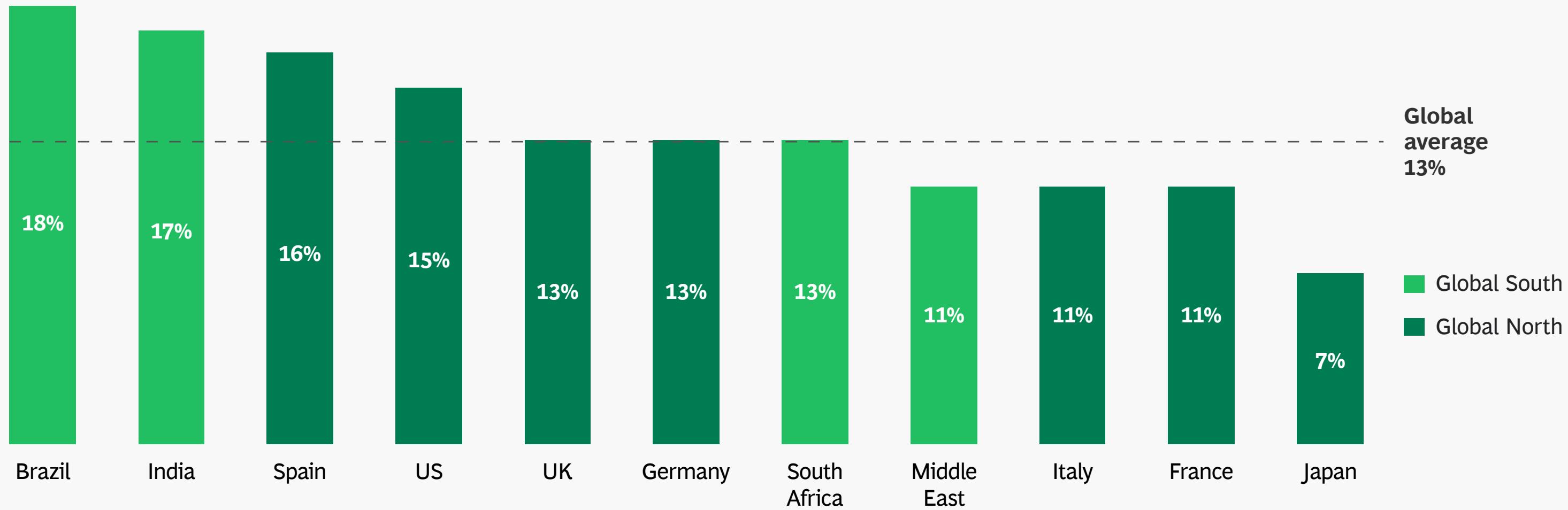
Brazil, India, Spain, and the US are at the forefront of using AI agents

Share of respondents reporting their company is integrating AI agents into workflows

Global average 13%

Brazil	India	Spain	US	UK	Germany	South Africa	Middle East	Italy	France	Japan
18%	17%	16%	15%	13%	13%	13%	11%	11%	11%	7%

■ Global South
■ Global North

Lack of human oversight, unclear accountability, and risk of bias– employees are raising flags on AI agents

Top three concerns regarding AI agents

Decisions taken without human oversight — **46%**

Unclear accountability when mistakes occur — **35%**

Bias or unfair treatment introduced — **32%**
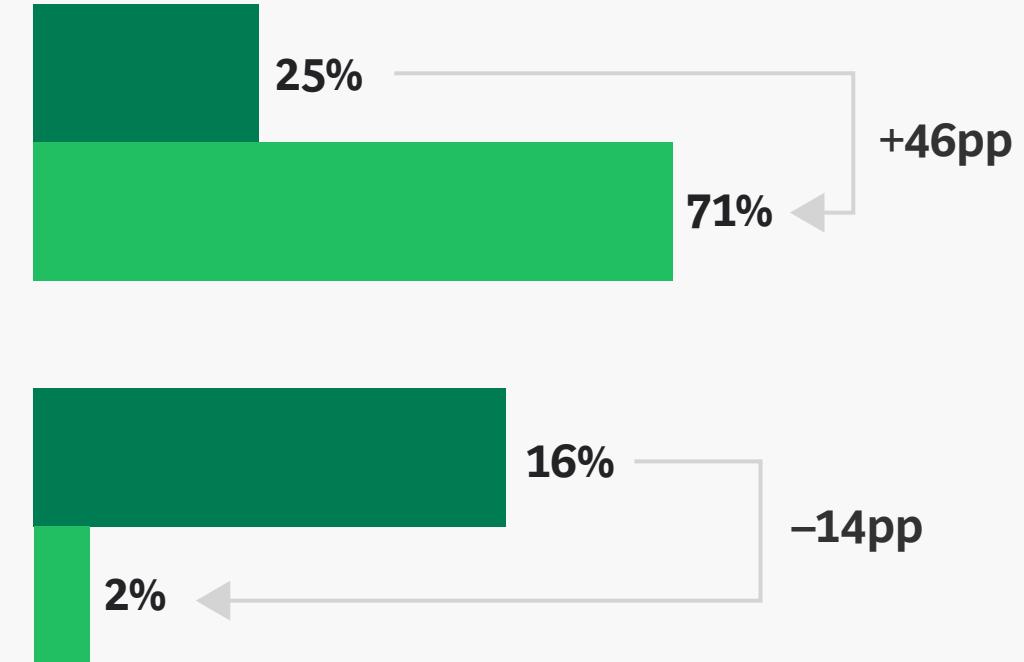
When employees are more familiar with AI agents, they see them as a valuable tool rather than a threat

Employees see AI agents as...

…A valuable tool that can support and collaborate with human workers

25%

71%

+46pp

…A potential threat to certain human jobs or responsibilities

16%

2%

−14pp

■ Employees who heard about AI agents, but unsure of what they actually do[1]

■ Employees who understand AI agents well and can explain how they work[2]

Strategic imperatives for leaders

1

Stop underestimating the importance of training. Commit appropriate levels of investment, time, and leadership support.

2

Track the value you are generating with AI improvements in productivity, quality, and employee satisfaction.

3

Invest in your people to reshape workflows and unlock AI's value. Anticipate AI's impact on work, workers, and the workforce. Build upskilling and reskilling capabilities to support workforce deployment.

4

Experiment rigorously with agents to accelerate the experience curve. Track impact and potential risks via A/B testing.

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