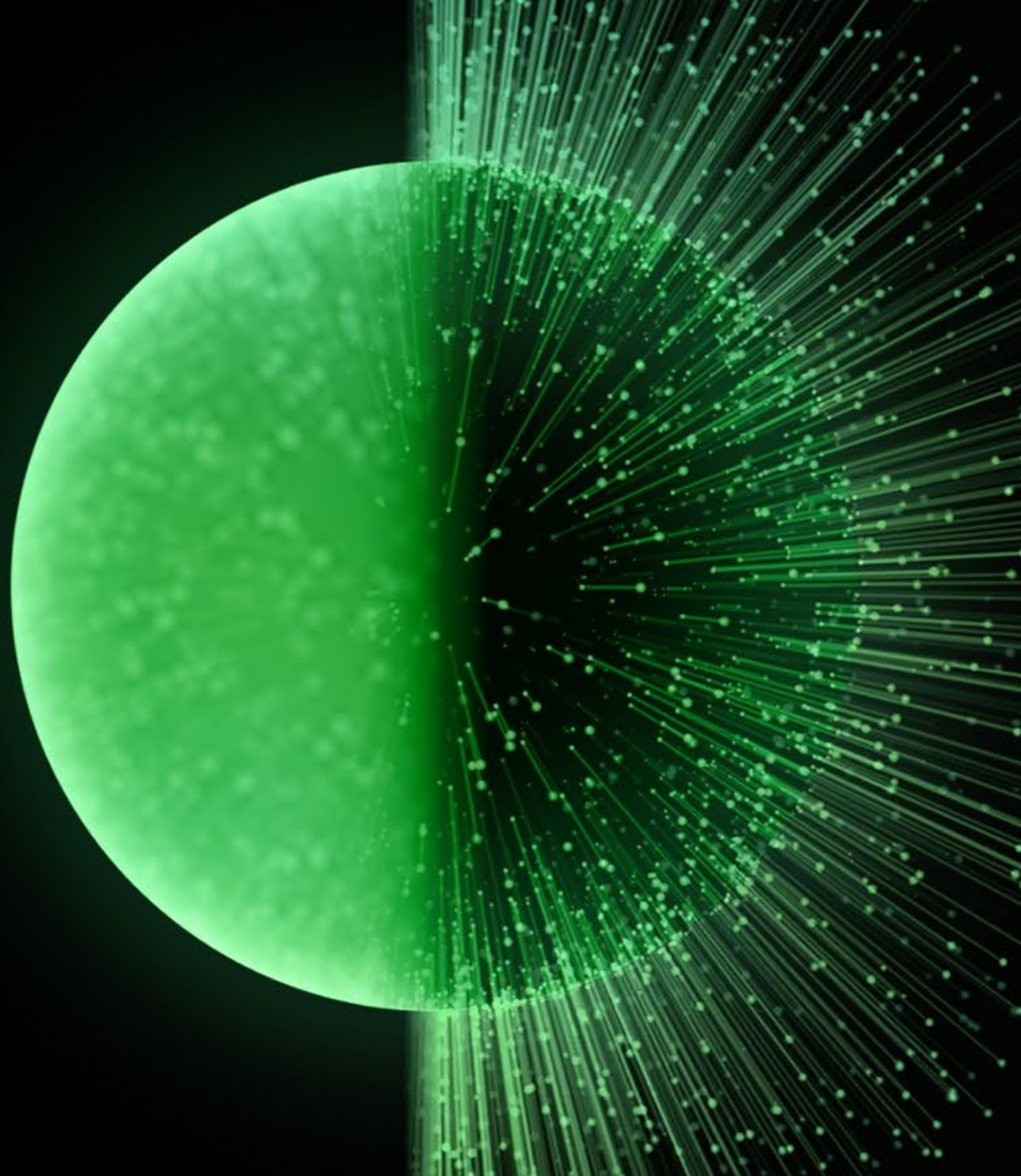
BCG X | BCG

BCG AI AT WORK

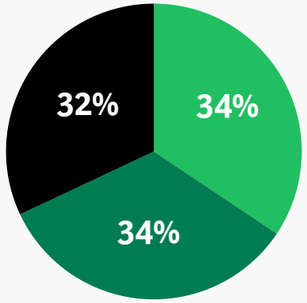
Strategy Matters More Than Tools



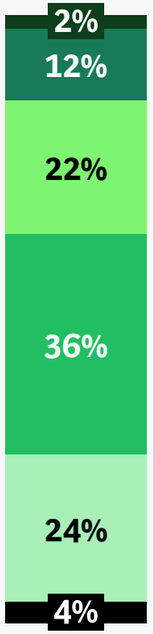
FOURTH EDITION | JUNE 2026

Survey parameters

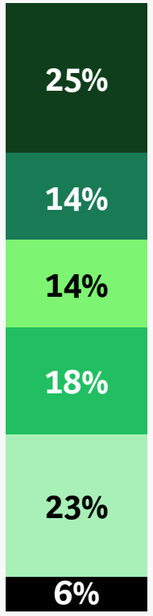
11,749
respondents



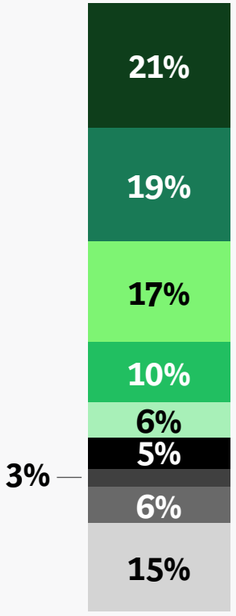
Roles
- Frontline employees
- Managers
- Leaders



Age
- 65+
- 55–65
- 45–54
- 35–44
- 25–34
- 18–24

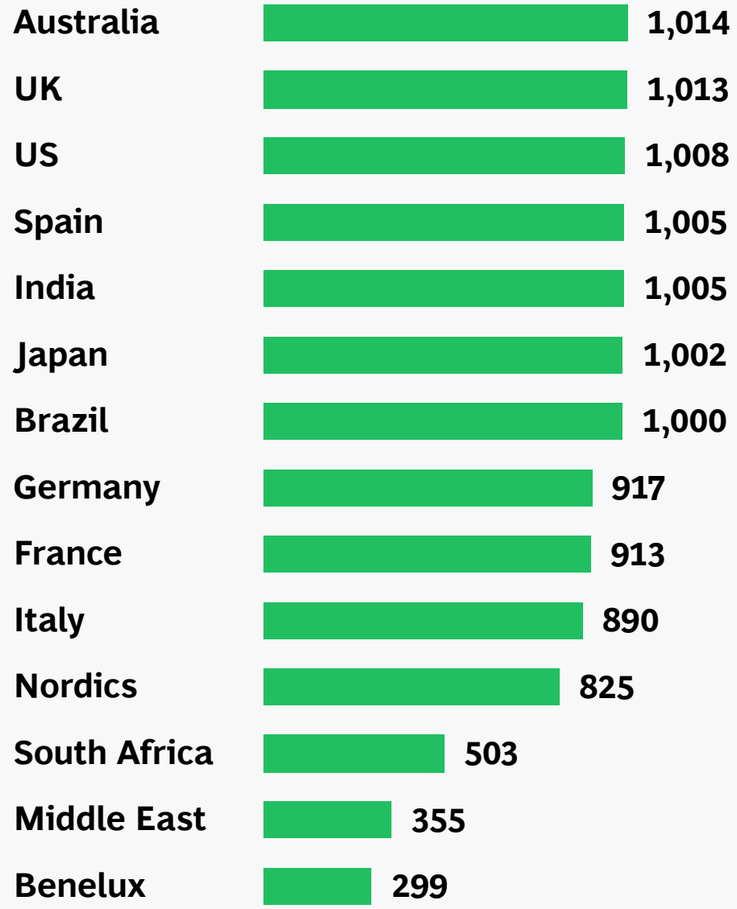


Company revenue
- >$10B
- $5B–$10B
- $2B–$5B
- $1B–$2B
- $500M–$1B
- $100M–$500M



Industry
- TMT
- Financial services
- Consumer/retail
- Industrial goods
- Energy/utilities
- Insurance
- Health care/medical
- Public sector
- Others

Key Markets



Sources: AI at Work, 2026 (n=11,749); BCG analysis.
Notes: Frontline employees = individual white-collar employees with no managerial responsibilities. TMT = technology, media, and telecommunications. Nordics include Sweden, Denmark, Norway, and Finland. Middle East includes UAE, Saudi Arabia, Kuwait, and Qatar. Benelux includes Belgium and the Netherlands.

New findings reinforce trends observed in 2025



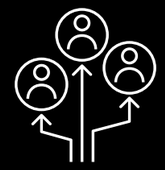
The time individuals save doesn’t automatically translate into value

42% of frontline employees who are regular AI users save a full day or more per week. But 66% still receive limited or no guidance on what to do with time they save, and more than half don’t redirect it to strategic work.



Rethinking work end-to-end is a prerequisite for creating value

More organizations are using AI to “invent,” building new business models. Companies that redesign workflows end-to-end outperform those that only deploy tools on value captured and employee joy. The gap keeps widening, driven by a clearer roadmap and deeper investment in people.



Proper training and leadership support remain the biggest unmet promises and strong levers to unlock AI’s potential

72% of respondents say expectations about skills have shifted, yet only 36% feel they received sufficient training, stable vs 2025. Only 33% of frontline employees say leadership communicates clearly about AI, and 28% see strong alignment between what leaders say and what the organization actually does.

Five key takeaways

1

No more “silicon ceiling”: frontline employees have integrated AI into their daily work

74% of frontline employees are now regular AI users, an increase of 23 percentage points from 2025. India and the Middle East lead adoption, while the US, France, and Italy trail behind.

2

The real challenge is now organizational and managerial

Everyone talks about time saved, but the real shift is deeper and structural. 72% of respondents report skill expectations have changed, and nearly half say their roles have shifted toward managing and directing AI instead of doing the work itself.

3

Business value and employee joy aren’t tradeoffs, they’re driven by the same forces

67% of regular AI users enjoy work more. The organizations that capture the most business value are also the places where employees enjoy working the most.

4

The AI “honeymoon” won’t last unless leaders bring strategic clarity driving sustained impact

AI’s novelty and cognitive stretch fuel enjoyment early on. But sustained joy comes from strategic clarity. Employees thrive when the direction is real and the message reaches them with strong CEO involvement.

5

AI agents went from concept to reality, but operating models haven’t caught up

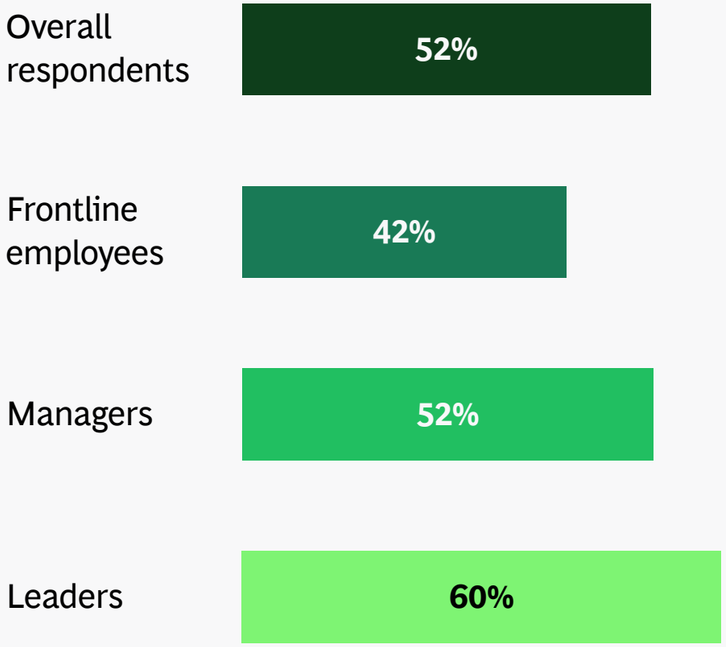
Integration into workflows more than doubled since 2025, and 61% of respondents believe agents could do half their job within three years. Yet governance (oversight, accountability) still lags far behind the tech.

New findings reinforce trends observed in 2025

Among frontline employees who are regular AI users, 42% report saving at least a workday per week

Leaders have the biggest AI payoff, with 60% saving at least a workday per week

Respondents saving at least 8 hours per week



Some job functions are further ahead than others

Top job functions where frontline employees are saving at least 8 hours per week

60% Marketing

53% IT

50% Human resources

49% Finance

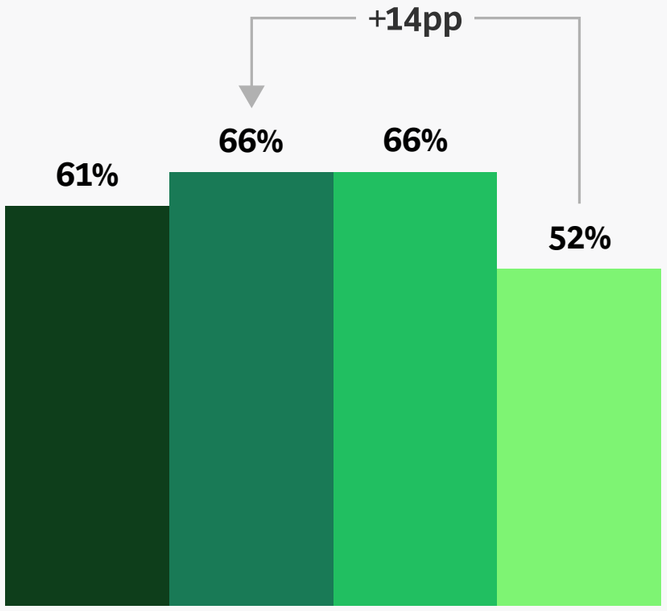
48% Data science and analytics

Sources: AI at Work, 2026 (n=8,989, includes regular AI users, excludes outliers); BCG analysis.
Note: Frontline employees = individual white-collar employees with no managerial responsibilities.

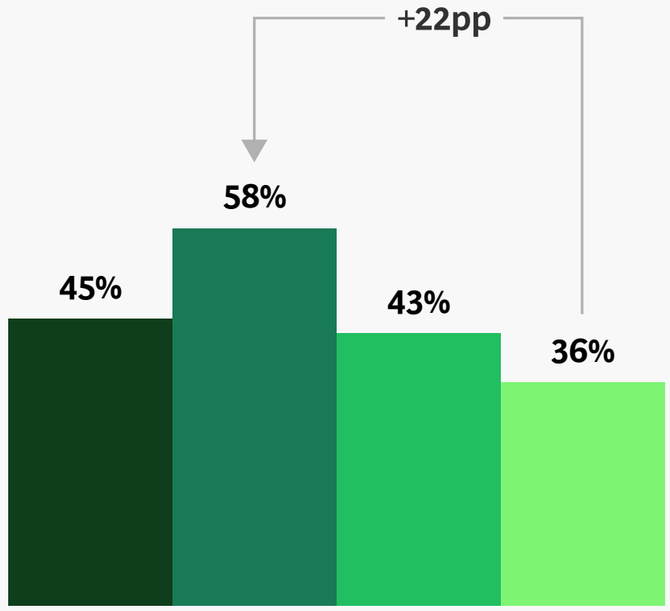
Frontline employees report getting the least guidance on how to spend the time AI saves, and more than half of them don’t redirect it into strategic work

The gap is wide: managers and leaders feel guidance is clearer and perceive more impact than frontline employees

Respondents who say their organizations give limited or no guidance on what to do with the time saved



Respondents who declare not reinvesting time saved into more strategic work

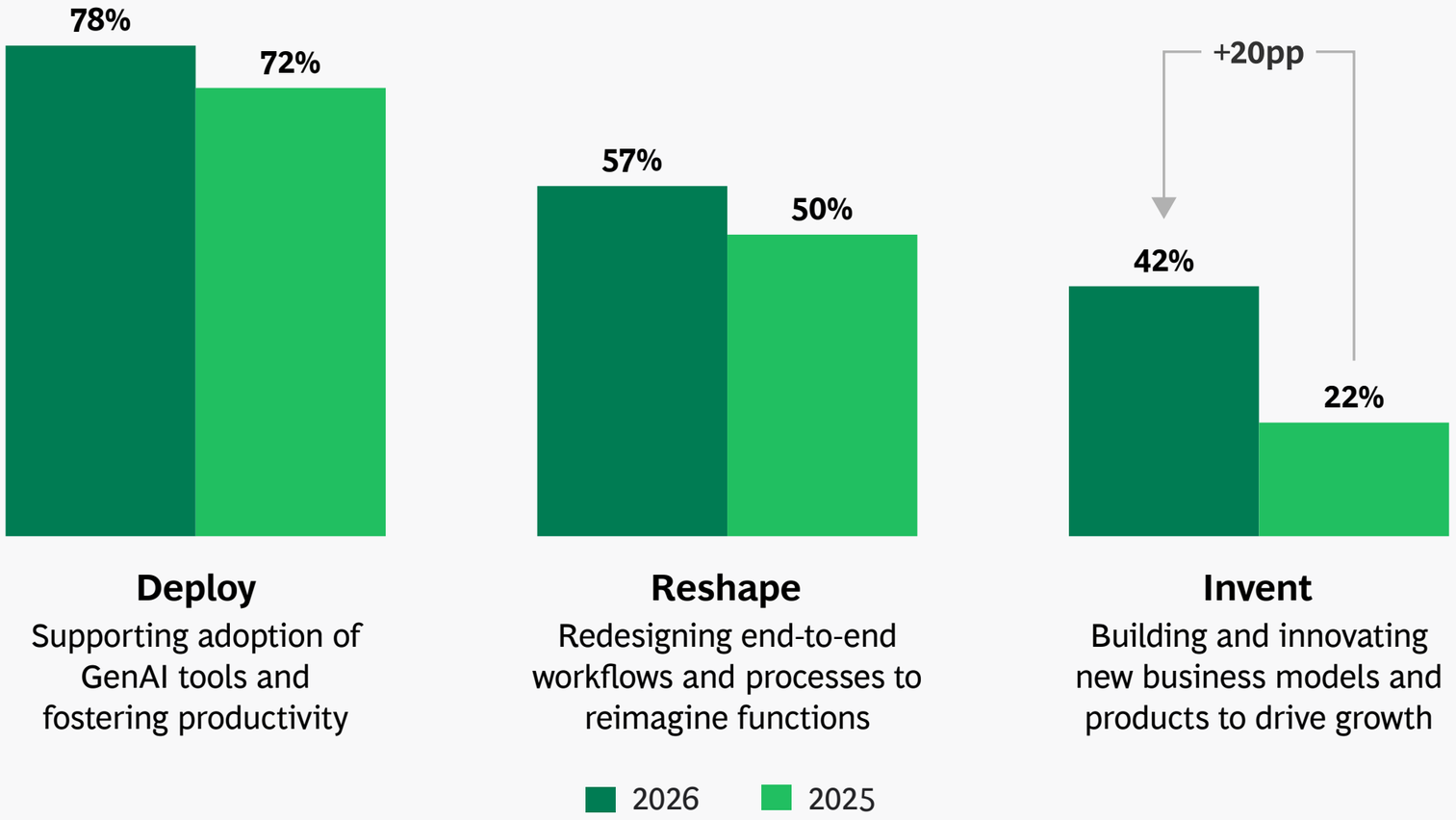


Overall respondents | Frontline employees | Managers | Leaders

Sources: AI at Work, 2026 (n=8,989, includes regular AI users, consistent sample with time-saved analysis); BCG analysis.
Note: Frontline employees = individual white-collar employees with no managerial responsibilities.

Organizations are moving past individual use case deployments; Invent initiatives have nearly doubled

How organizations are implementing AI tools

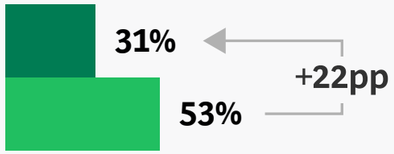


Sources: AI at Work, 2026 (n=11,749); BCG analysis.

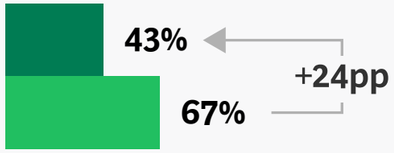
Using AI for Reshape or Invent initiatives pays off by delivering more value and providing a better employee experience

Companies pursuing Reshape or Invent initiatives deliver more value…

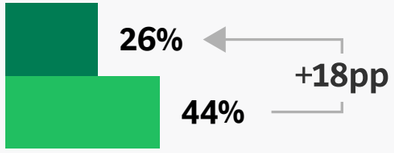
Save more time
Employees who save at least a day per week



Prove the impact
Employees who see measurable business improvement

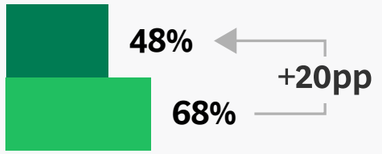


Earn trust
Employees who fully trust leadership's AI communications

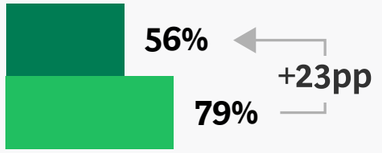


… and their employees thrive

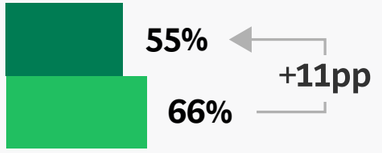
Enjoy work more
Employees who report increased job satisfaction



Show their value
Employees who find it easier to demonstrate unique value



Feel more confident
Employees who feel confident working with AI



Respondents at companies that only focus on Deploy initiatives

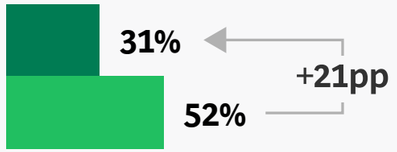
Respondents at companies that focus on Reshape or Invent initiatives

Sources: AI at Work, 2026 (n=10,990, including 2,919 respondents at Deploy companies and 8,071 respondents at Reshape or Invent companies; total excludes respondents who were not sure how their organizations were implementing AI); BCG analysis.

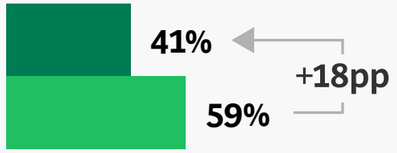
What makes Reshape or Invent initiatives more successful: a clearer roadmap and deeper investment in people

Companies pursuing Reshape or Invent initiatives build a clearer roadmap…

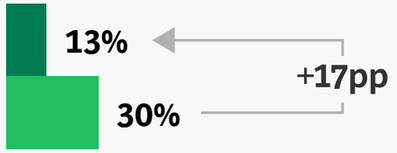
Sets the direction
Employees who say AI strategy is clear



Defines the rules
Employees who see adequate guardrails in place

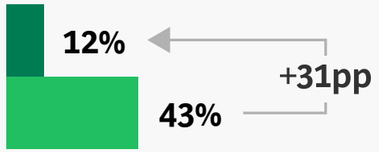


Puts agents to work
Employees who see agents integrated into workflows

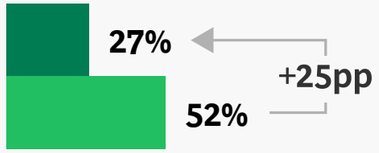


… and invest in the people behind it

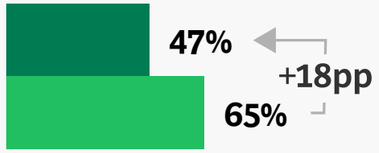
Brings people in
Employees who participate in process redesign



Measures what matters
Employees who see AI value creation properly tracked



Invests in skills
Employees who experience a major reskilling initiative



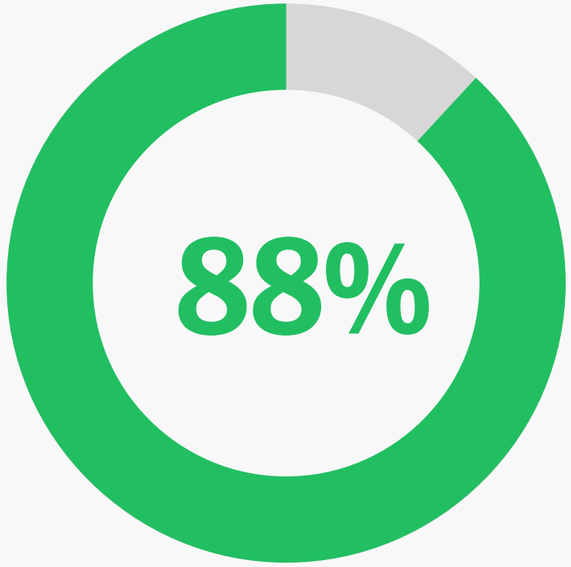
Respondents at companies that only focus on Deploy initiatives

Respondents at companies that focus on Reshape or Invent initiatives

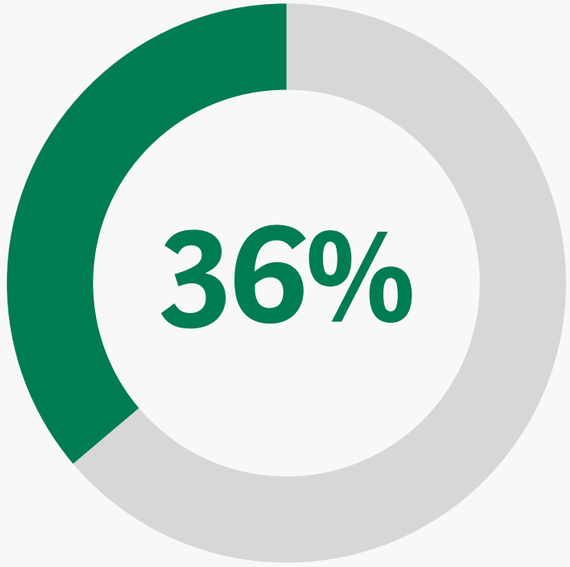
Sources: AI at Work, 2026 (n=10,990, including 2,919 respondents at Deploy companies and 8,071 respondents at Reshape or Invent companies; total excludes respondents who were not sure how their organizations were implementing AI); BCG analysis.

Demand for upskilling is loud and persistent. The response still falls short

Most respondents expect a need for upskilling in the next five years, yet only 36% feel properly trained



Of respondents believe they need major upskilling in the next five years



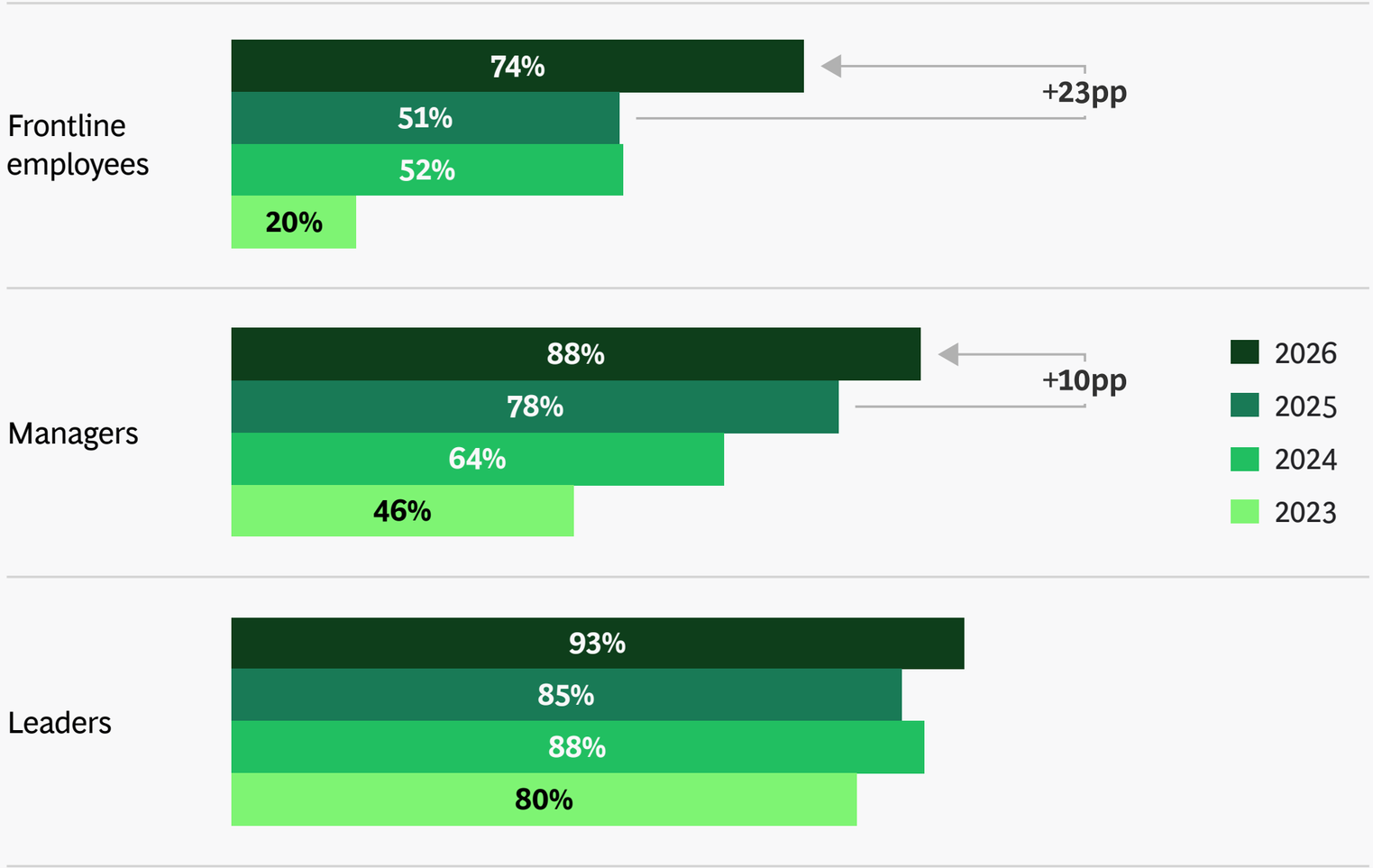
Of respondents feel properly trained

Sources: AI at Work, 2026 (n=11,749); BCG analysis.
Note: Share of respondents for both metrics is unchanged from 2025.

No more “silicon ceiling”: frontline employees have integrated AI into their daily work

74% of frontline employees now describe themselves as regular AI users, driving overall adoption

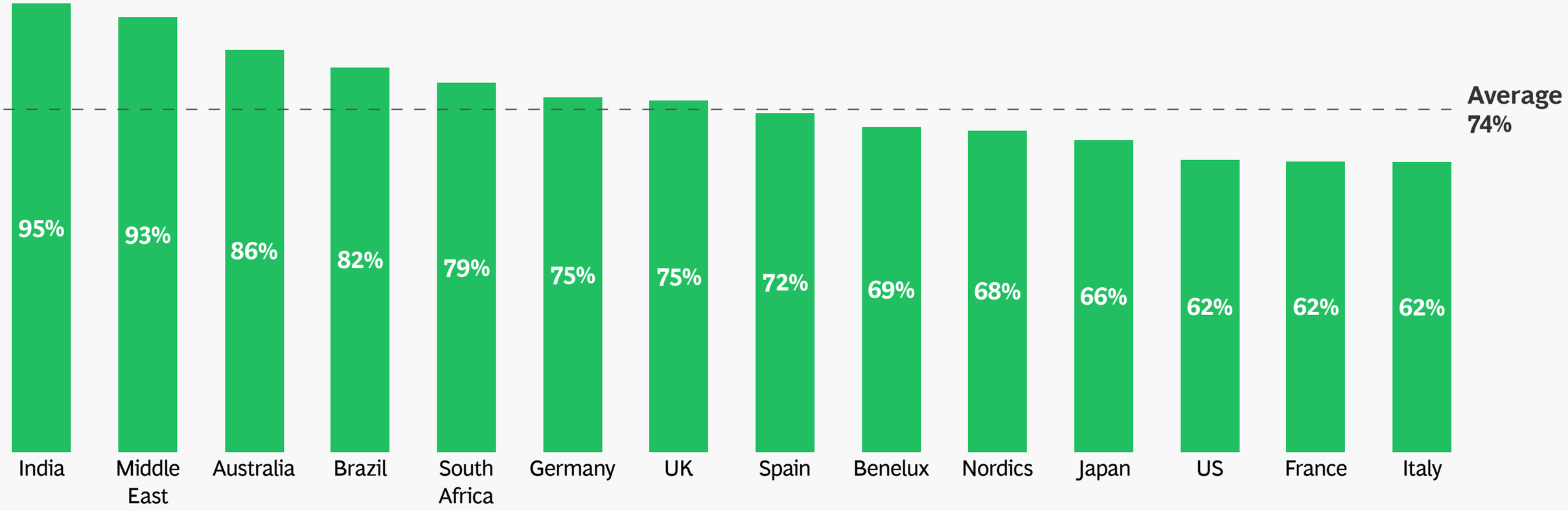
Regular AI use across worker levels



Sources: AI at Work, 2026 (n=11,749); BCG analysis.
Notes: Regular AI users = people who use AI daily or several times a week. Frontline employees = individual white-collar employees with no managerial responsibilities.

India, the Middle East, and Australia lead adoption for frontline employees, while France, Italy, and US trail the average

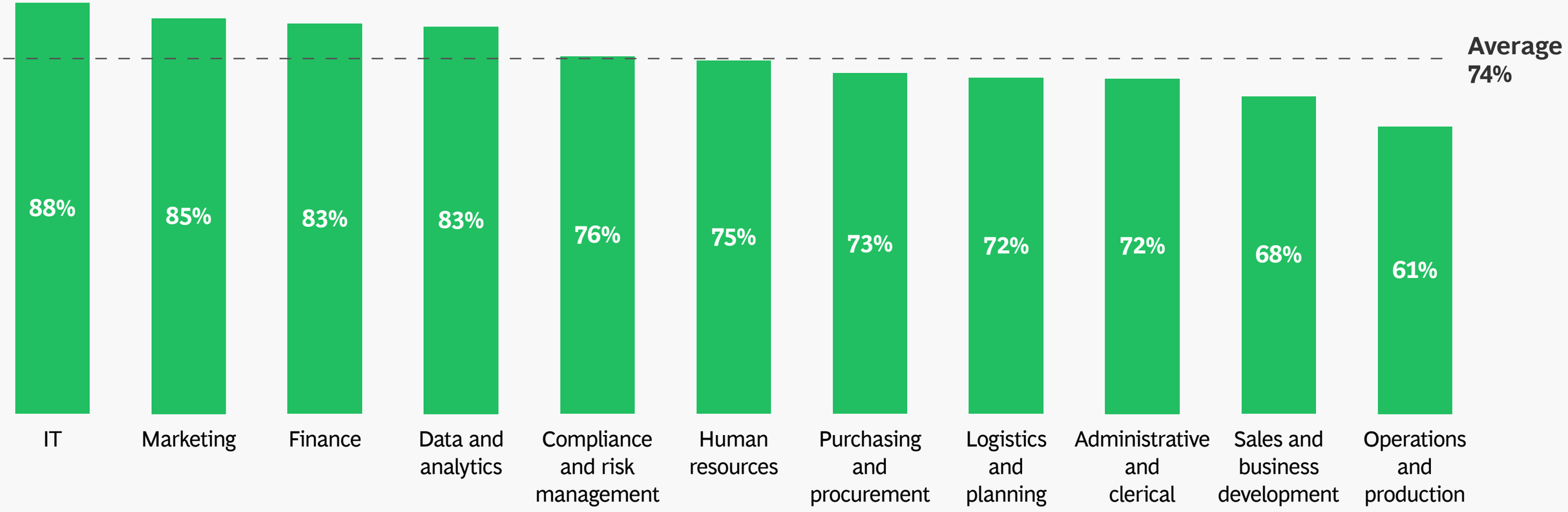
Frontline employees who use AI at least several times a week, by market



Sources: AI at Work, 2026 (n=4,040 frontline employees); BCG analysis.
Note: Frontline employees = individual white-collar employees with no managerial responsibilities. Middle East includes UAE, Saudi Arabia, Kuwait, and Qatar. Benelux includes Belgium and the Netherlands. Nordics include Sweden, Denmark, Norway, and Finland.

Support functions lead adoption among frontline employees, while sales and operations lag behind

Frontline employees who use AI at least several times a week, by function

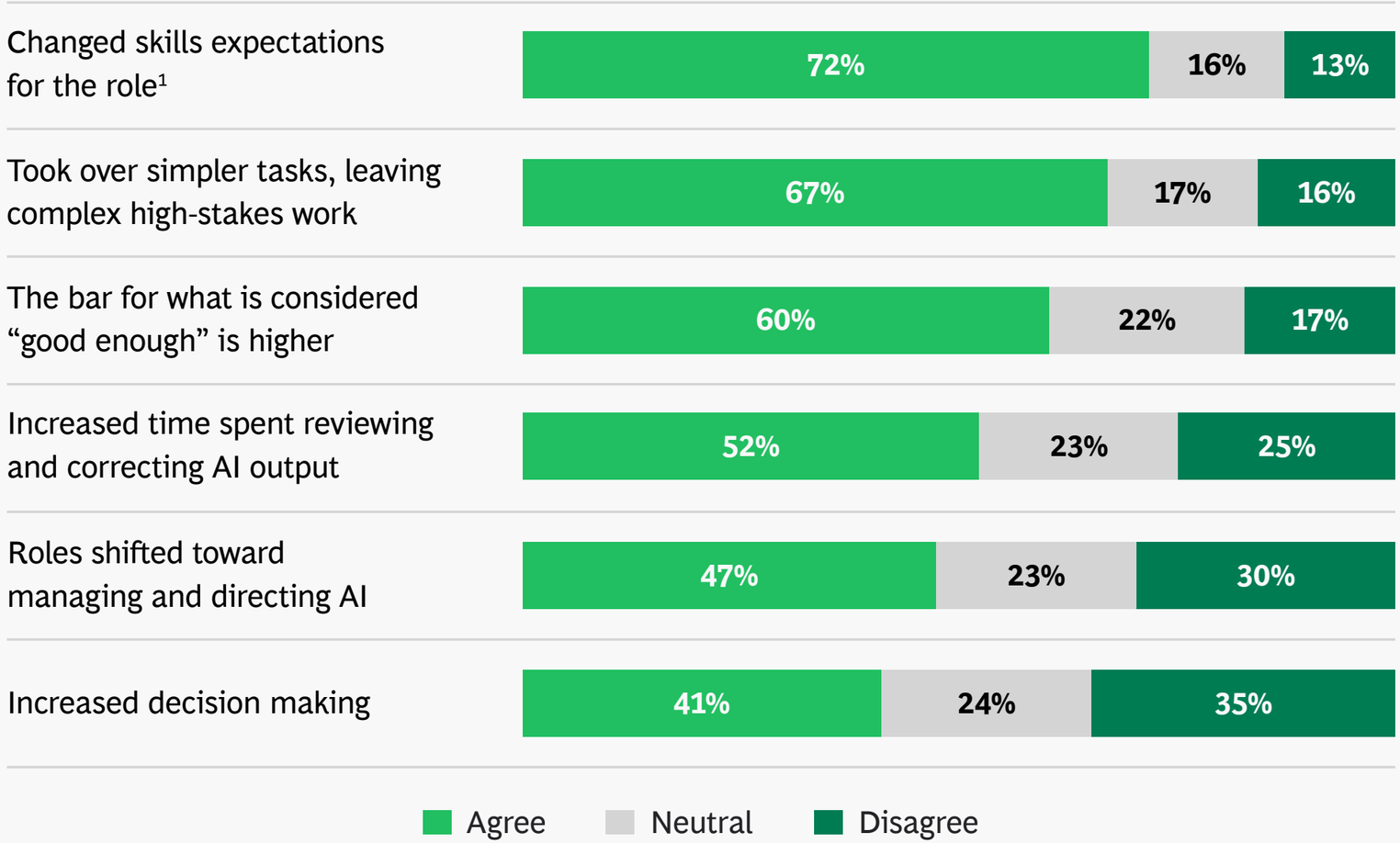


Sources: AI at Work, 2026 (n=4,040 frontline employees); BCG analysis.
Note: Frontline employees = individual white-collar employees with no managerial responsibilities.

The real challenge is now organizational and managerial

AI is reshaping work, impacting the very nature of jobs and management

Aspect of work that respondents say have been changed by AI



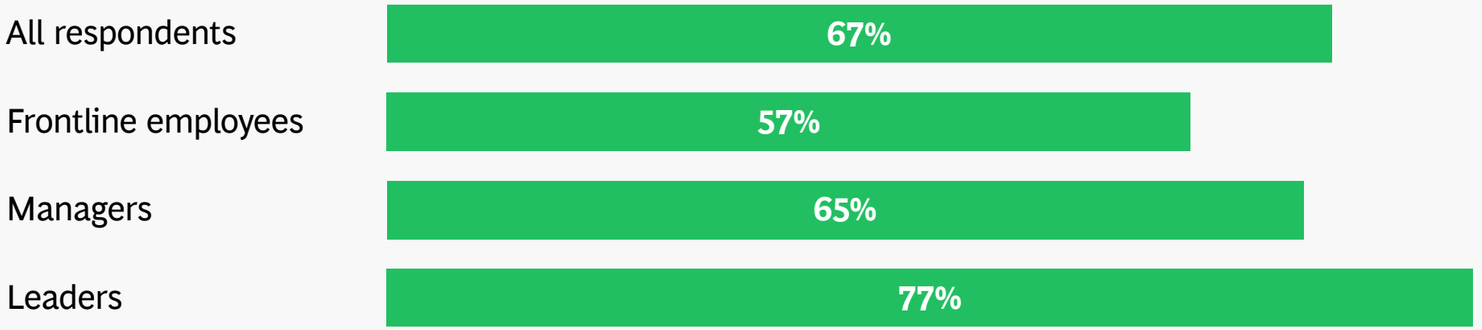
Sources: AI at Work, 2026 (n=11,749); BCG analysis.
[1]Share of respondents who report AI will significantly or moderately change the expectation for the skills needed for the role.

Business value and employee joy aren’t tradeoffs, they’re driven by the same forces

The “joy paradox” of AI: it makes work both better and harder

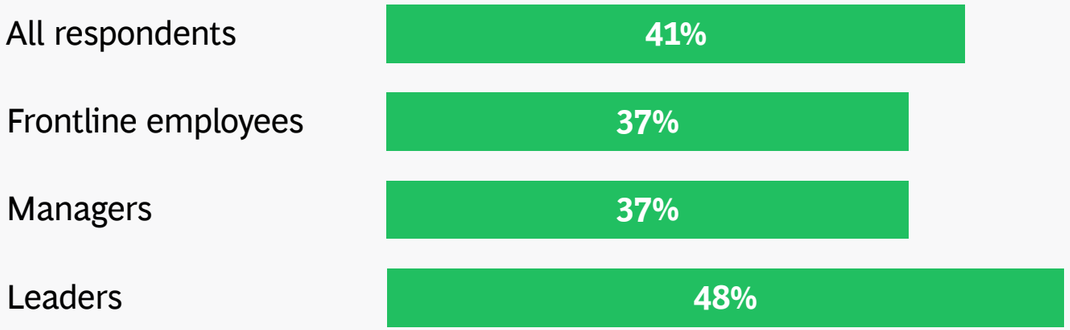
More than two-thirds of regular AI users report an increase in job satisfaction…

Change in day-to-day work enjoyment and satisfaction since adopting AI



… but 41% report increased mental strain associated with it

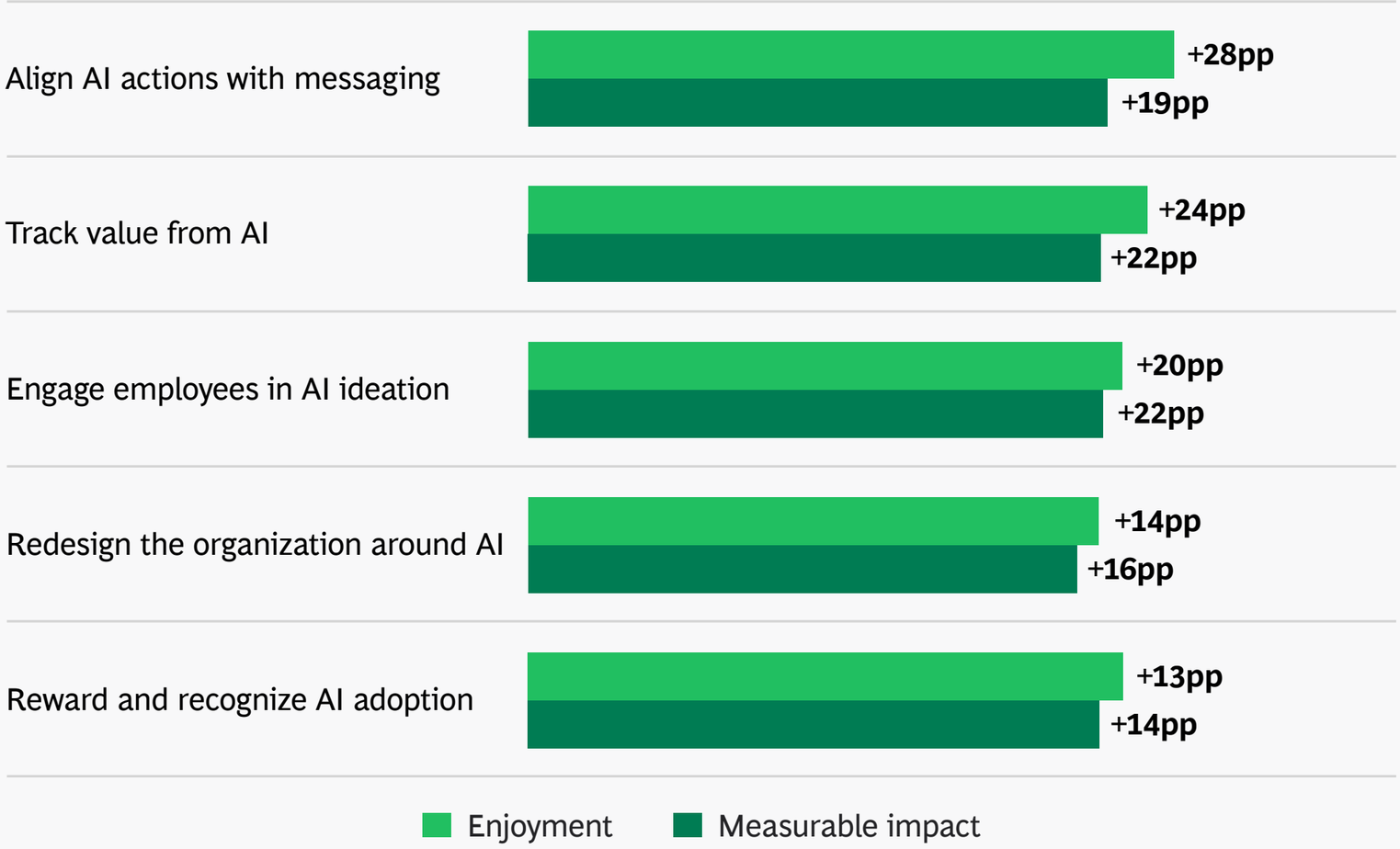
Change in cognitive load since adopting AI



Sources: AI at Work, 2026 (n=9,923 regular AI users); BCG analysis.
Note: Frontline employees = individual white-collar employees with no managerial responsibilities.

The actions that drive business impact are the same ones that make employees thrive

Top 5 organizational levers ranked by uplift across employee joy and measurable impact

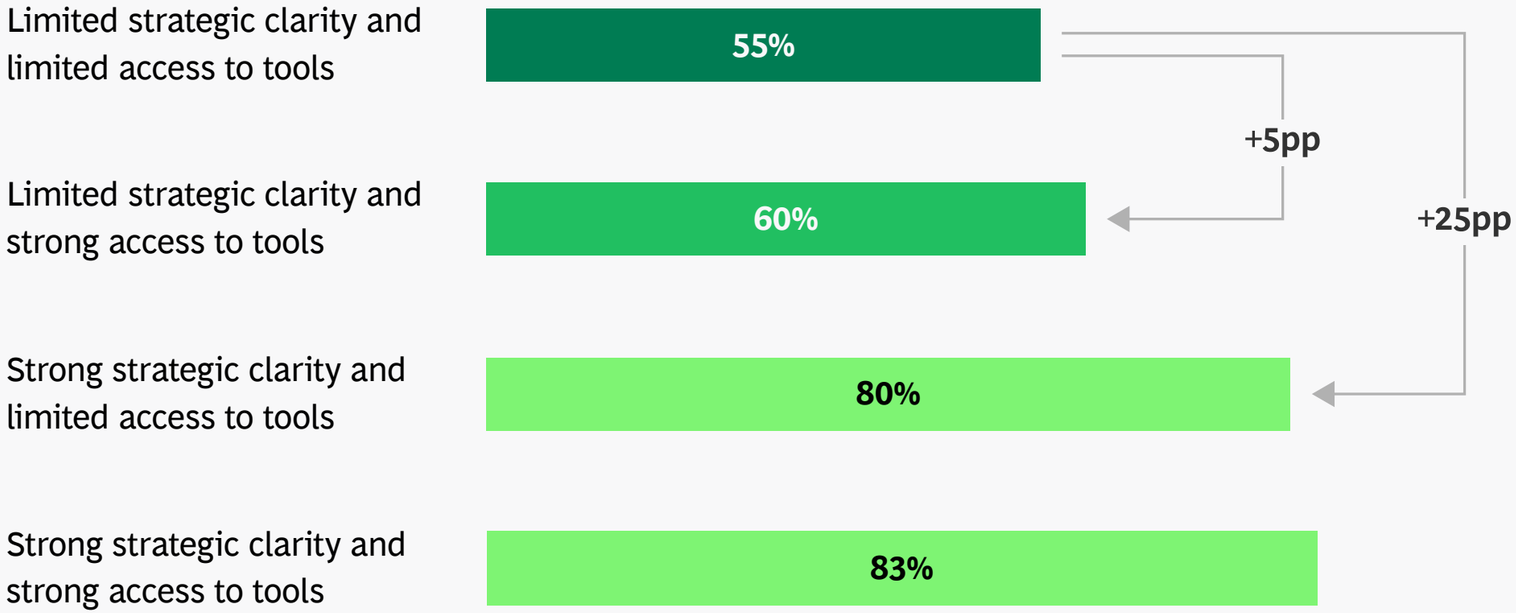


Sources: AI at Work, 2026 (n=9,923 regular AI users); BCG analysis.
Note: Measurable impact = Improvement in key business metrics attributed to AI.

Want the AI “honeymoon” to last? Strategic clarity beats tools in driving sustained impact

Strategic clarity beats tools: employees with clear strategy but limited access to tools outperform those with strong access but no direction

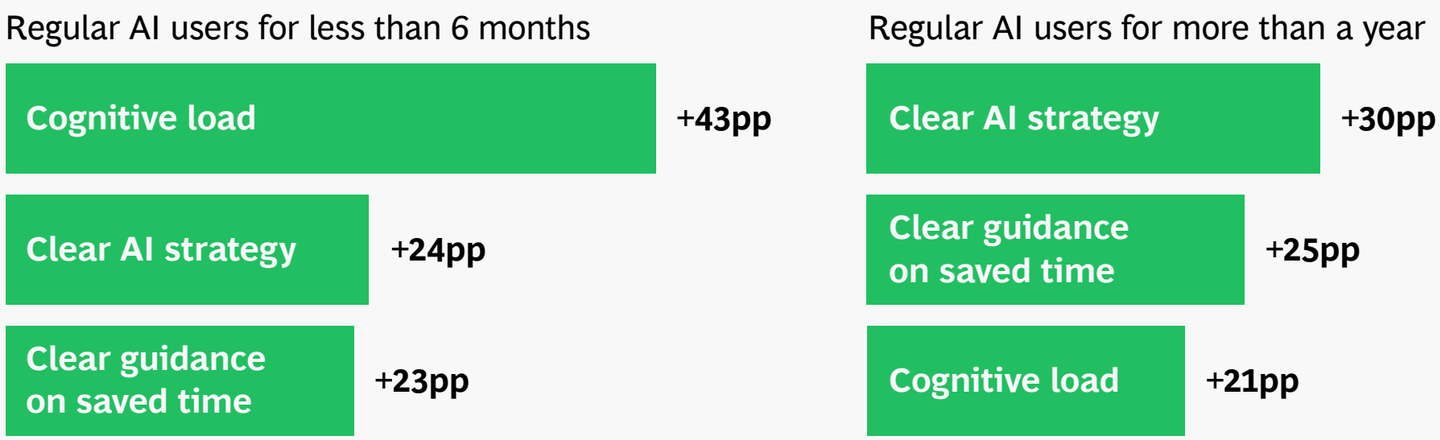
Respondents reporting measurable impact based on AI strategy clarity and availability of AI tools



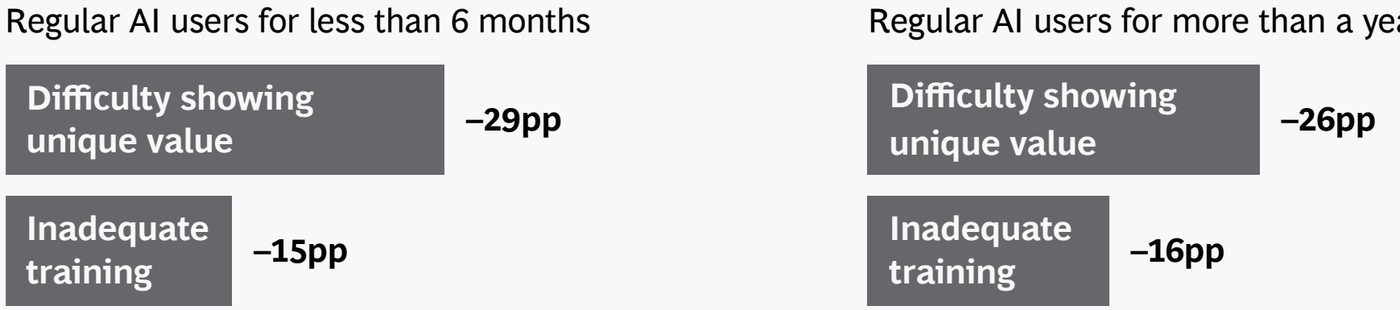
Sources: AI at Work, 2026 (n=9,923 regular AI users); BCG analysis.
Notes: Strong strategic clarity is defined as making AI a priority and having a clear AI strategy and guidelines for time saved. Strong access to tools is defined as having access to AI tools or to AI tools testing and experimentation.

The AI “honeymoon”? At first employees enjoy the cognitive load, but strategic clarity is the unlock to sustaining joy over time

The drivers of joy at work when using AI evolve over time...



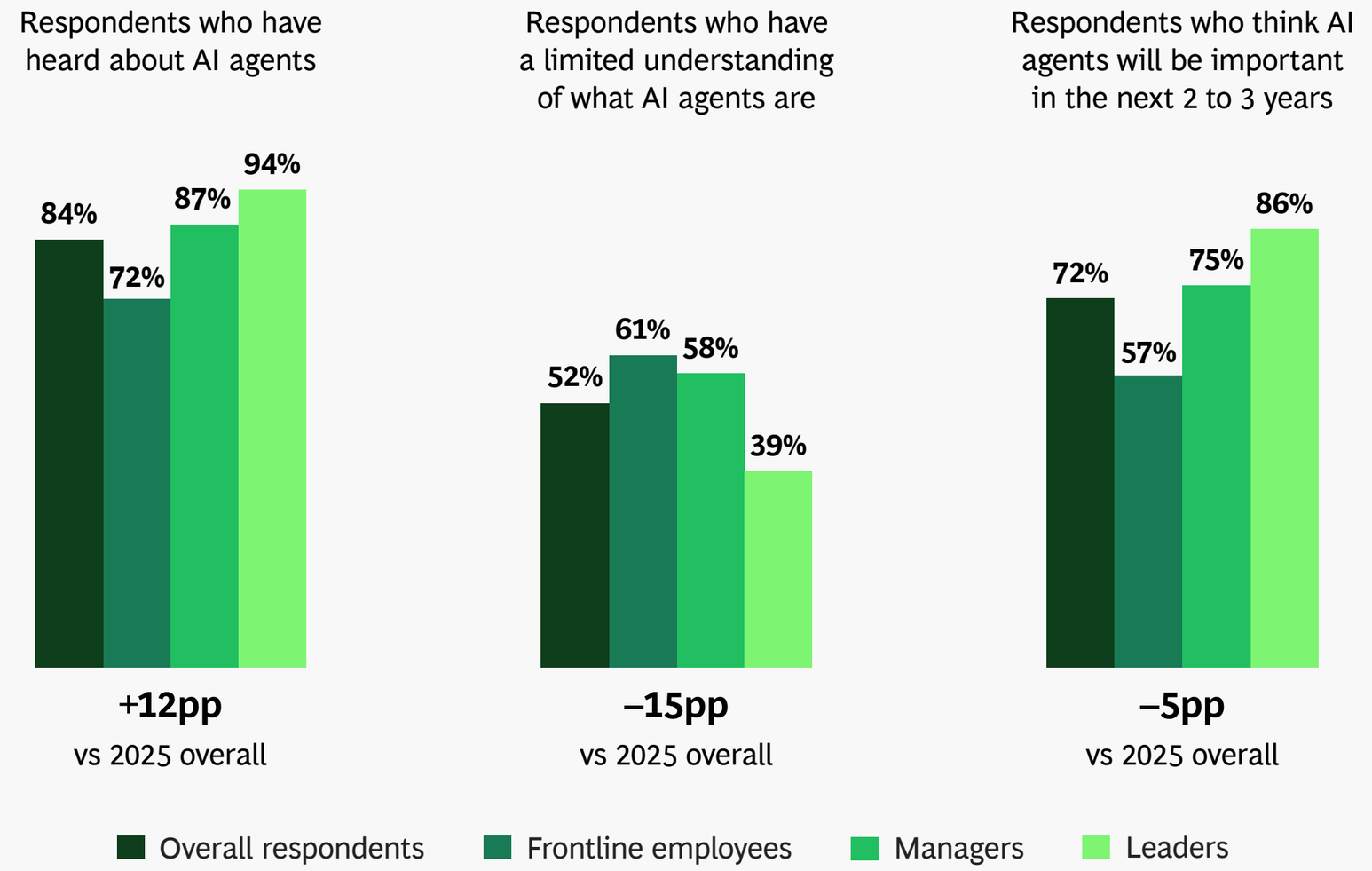
...the drivers of toil do not



Sources: AI at Work, 2026 (n=6,998 respondents who use AI regularly, less than 6 months vs more than a year); BCG analysis.
Note: +/–pp = the extra share of employees who enjoy work when a driver is present (+) or the share lost when a blocker is present (–).

AI agents have evolved from concept to reality, but operating models haven’t caught up

More people are aware of AI agents and see their importance, but few understand what they are: a sign for leaders to make a better case for what they can do

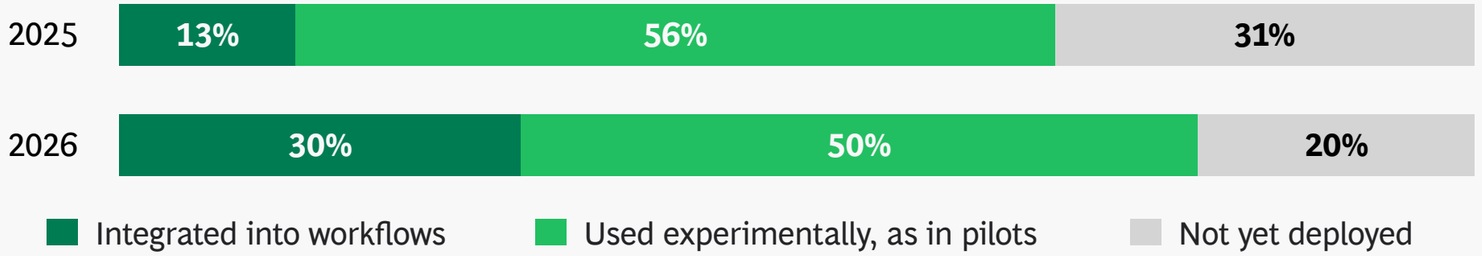


Sources: AI at Work, 2026 (n=11,749); BCG analysis.
Note: Frontline employees = individual white-collar employees with no managerial responsibilities.

More than double the organizations from 2025 have integrated AI agents into workflows, with meaningful impacts expected at the managerial level

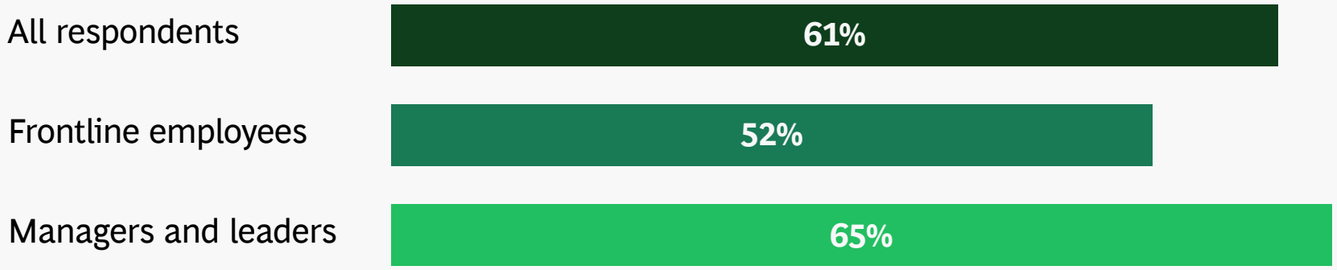
Respondents reporting measurable impact based on AI strategy clarity and availability of AI tools

AI agent use by type



Most people believe agents could do at least half their job in the future, and managers and leaders expect the biggest shift

Respondents who think that in the next three years AI agents could perform at least half of their job

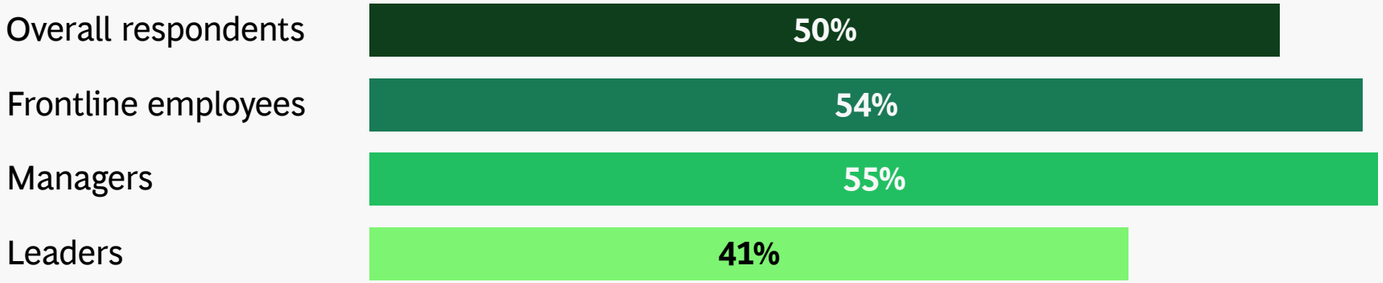


Sources: AI at Work, 2026 (n=9,923 regular AI users); BCG analysis.
Note: Frontline employees = individual white-collar employees with no managerial responsibilities.

The missing piece: operating models haven’t caught up with AI agents’ deployment

Half of employees lack clear governance for managing human × AI teams: frontline employees and managers feel it the most

Respondents who say their company has not put in place clear guidance on managing human × AI teams



Accountability is a universal concern, equally shared across all levels

Respondents who rank AI-driven accountability as a top 3 concern in the next 2 to 3 years



Sources: AI at Work, 2026 (n=8,849 respondents who have heard of AI agents and regular AI users); BCG analysis.
Notes: Frontline employees = individual white-collar employees with no managerial responsibilities.

Five CEO imperatives

1	**Make strategic clarity your top priority, and own it personally**	Strategic clarity is not a communications task, it's a leadership posture. Set AI as an explicit top priority, be clear about where the company is heading, and make sure everyone gets it, the frontline included. CEOs who personally own the transformation outperform on every dimension: value captured, employee joy, and trust.
2	**Change the scoreboard: measure value, not adoption**	Adoption tells you that people use AI, not whether it pays off. The time that individuals save leaks out of the organization unless it is tracked and deliberately reinvested. So, watch business outcomes rather than usage.
3	**Invest in redesigning work end-to-end, not in more tools**	Most companies still treat AI as a tool for individual productivity, but the more important change is a collective one: AI is reshaping how teams work together and how tasks flow across the organization. Capturing that value means redesigning a few core processes from end-to-end.
4	**Put people at the heart of that redesign**	The redesign only works if people are in it. Look ahead at how roles will shift over the next few years, train for the skills that matter most, and bring people into shaping the change rather than presenting it to them. What keeps people engaged is knowing how AI helps them grow, not how much faster they work.
5	**Govern it as a moving target, not a one-off program**	Technology moves faster than any company can. Treat AI as something you keep steering, not a program with a finish line. Put a light, standing governance in place that rechecks what works, remeasures the value, and adjusts as the models and agents evolve.



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