
AI Adoption and Impact Review

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Our review seeks to increase the rigor of public discussion about AI adoption and impact



THE HYPE-Y NATURE OF
AI CREATES A LOT OF
NOISE



SOCIAL MEDIA AMPLIFIES
EXTREME VIEWS AND
SHOCKING FINDINGS



PEOPLE DO NOT HAVE
TIME TO LOOK BEHIND
THE NUMBERS

Researching, fast and slow

- Our review aims to merge industry-based and academic research insights about AI's adoption and impact

Fast and broad

Industry-based research produces fast results and addresses managerial concerns more broadly than academic studies

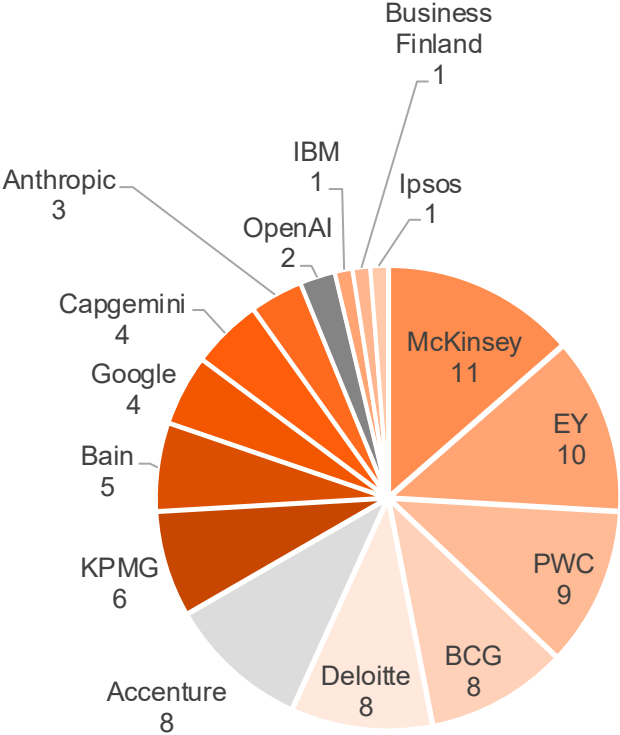


Slow and rigorous

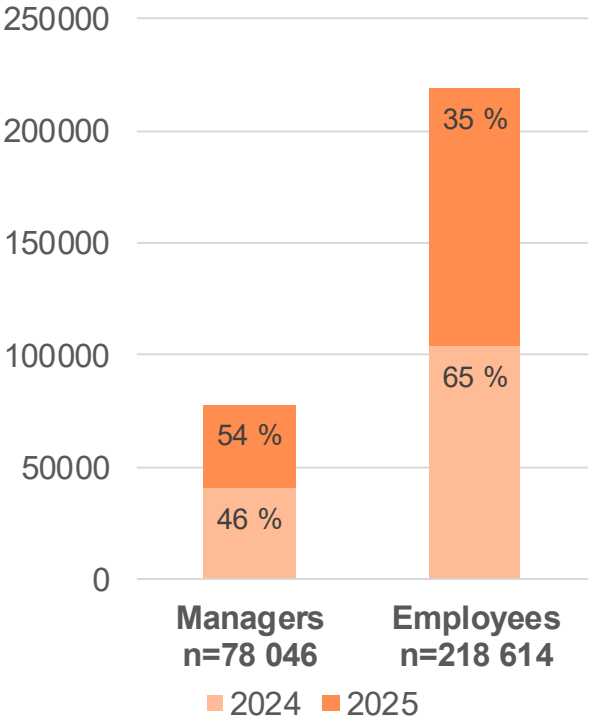
Academic research is slow and narrowly focused, but tops industry-based research in transparency and methodological rigor

Synthesizing insights from 80+ industry-based reports and selected academic articles

Industry-based reports



Total sample size



Example Report	Sample & level of detail
The State of AI in 2025 (McKinsey, 2025c)	1 993 participants (all levels). 105 nations, range of industries, company sizes, functional specialties, and tenures. 38% work in organizations with \$1 billion in annual revenues.
AI Quarterly Pulse Survey 2024, Q4 (KPMG, 2025a)	100 executives/leaders. U.S. based organisations with over \$1 billion in annual revenue.
Trust, attitudes and use of artificial intelligence: A global study 2025 (KPMG, 2025f)	48 340 people , 32 352 employed (22% managers). Breakdown of age, gender, education, income, work status, occupation, org size. 47 countries (selected), each country's sample size 1000-1100. Online survey in native language.



AI Adoption and Impact Review

Highlights

The findings are based on an extensive and iterative analysis of large volumes of data. The conclusions are preliminary and contain an interpretive element. Please see the original studies for more details.

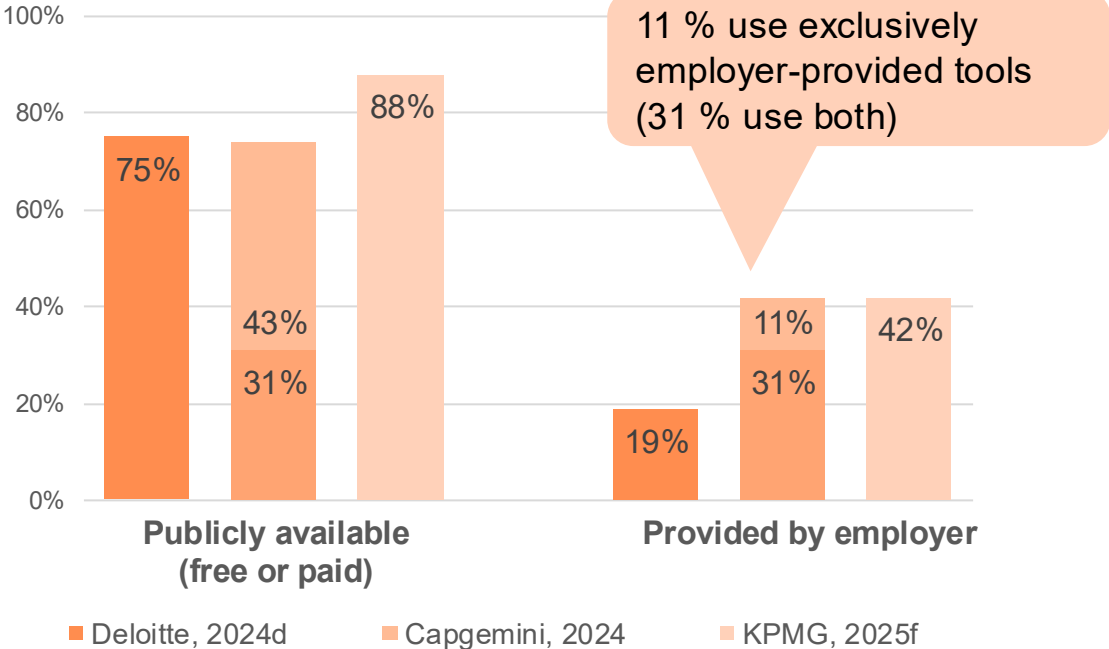
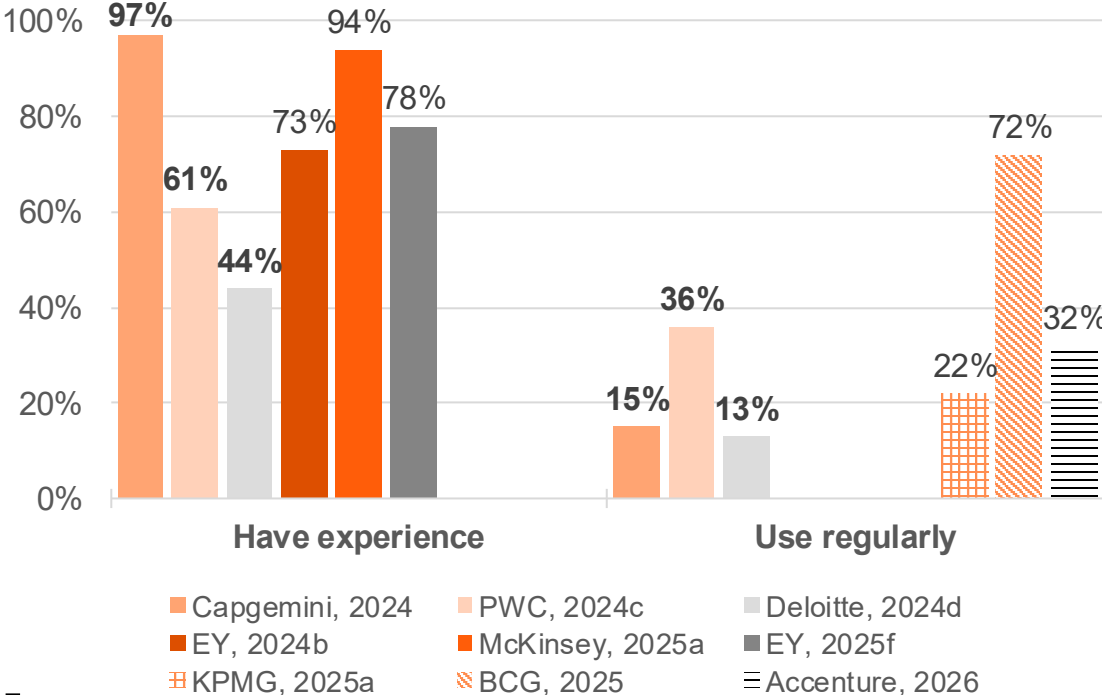
Individual adoption and perceptions

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Most employees have tried generative AI tools – but use is often irregular and driven by publicly available tools

Usage of generative AI for work has increased, but **only a minority use them regularly** and access at work is still limited¹

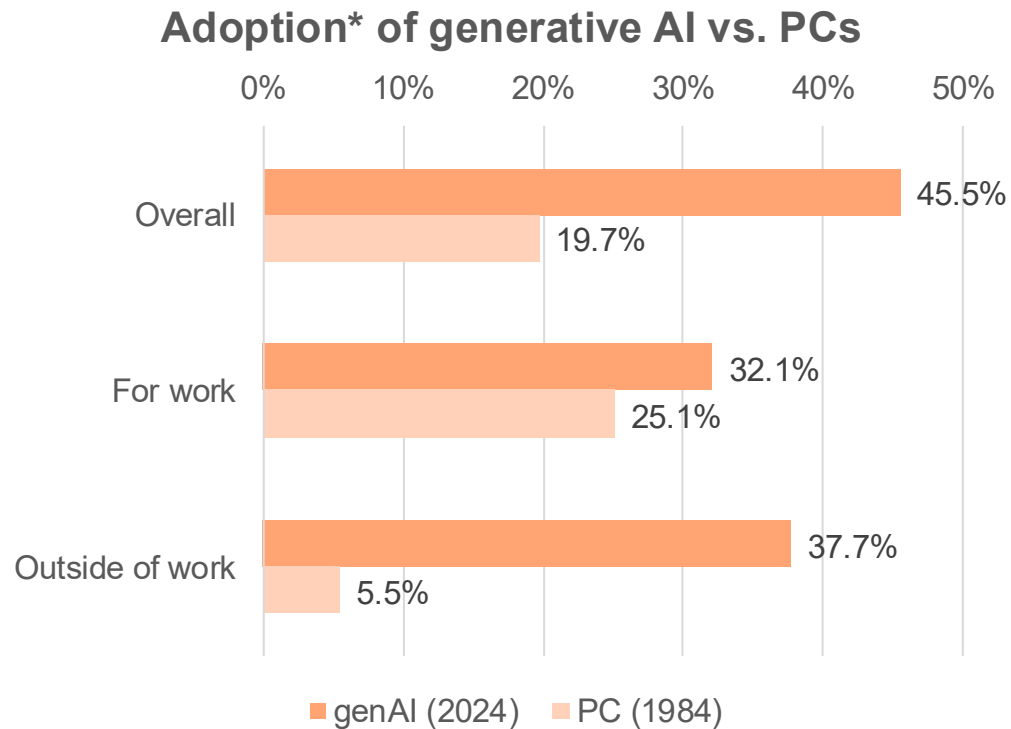
Publicly available tools (e.g. ChatGPT) are still leading adoption, even without official policies or guardrails²



1: EY, 2024b; McKinsey, 2024b; BCG, 2024b; EY, 2025f
 2: Capgemini, 2024

The adoption of generative AI is historically fast – and explained by a mix of autonomous adoption and employer support

Source: Bick, A., Blandin, A., & Deming, D. J. (2026). The Rapid Adoption of Generative AI. *Management Science*. <https://doi.org/10.1287/mnsc.2025.02523>



Redrawn after: Bick et al. (2026, Figure 2)

Predictors¹ of Generative AI Use at Work

+65 %-points in AI use

If employer encourages it

12 % of the variance in AI use

Explained by background variables (sex, age, education, occupation group) and predicted exposure²

¹ Selected from Table 1 in Bick et al. (2026)

² Eloundou et al. (2024)

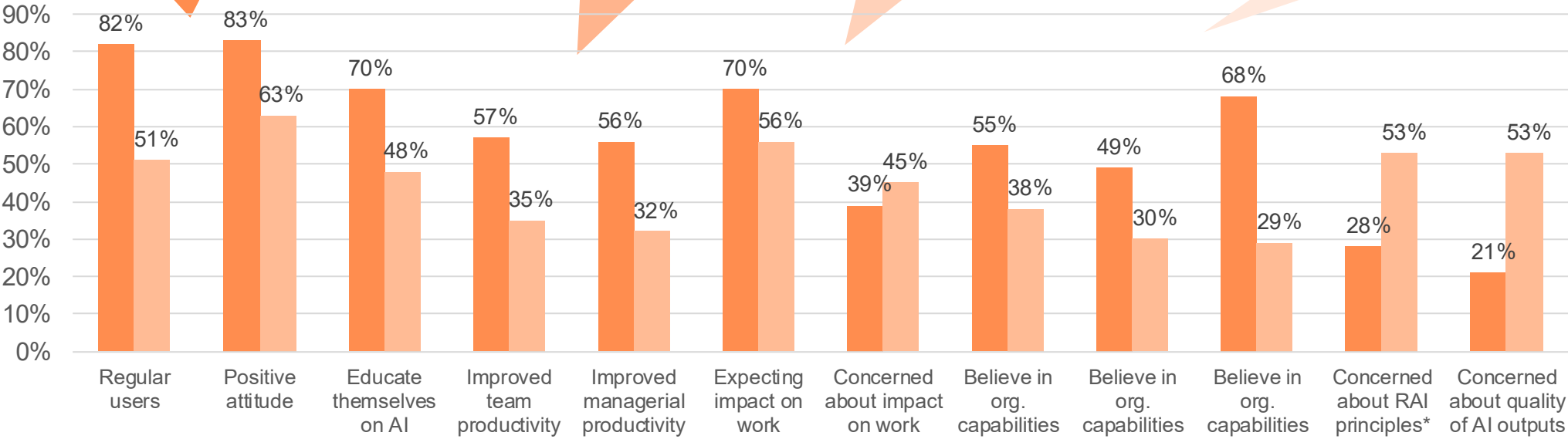
Managers have different views than their employees – and that view seems to be more optimistic

Managers more likely to use regularly, have a positive attitude and self-educate

Managers more likely to report improvements in their own and teams' productivity than their employees

Managers more likely to expect AI to impact their work, yet less likely to be concerned about it

Managers more likely to believe that their organization has adequate capabilities for transformation and responsible use of AI



Managers → CxOs, executives, managers
Employees → frontline, employees

Managers
Employees

A!

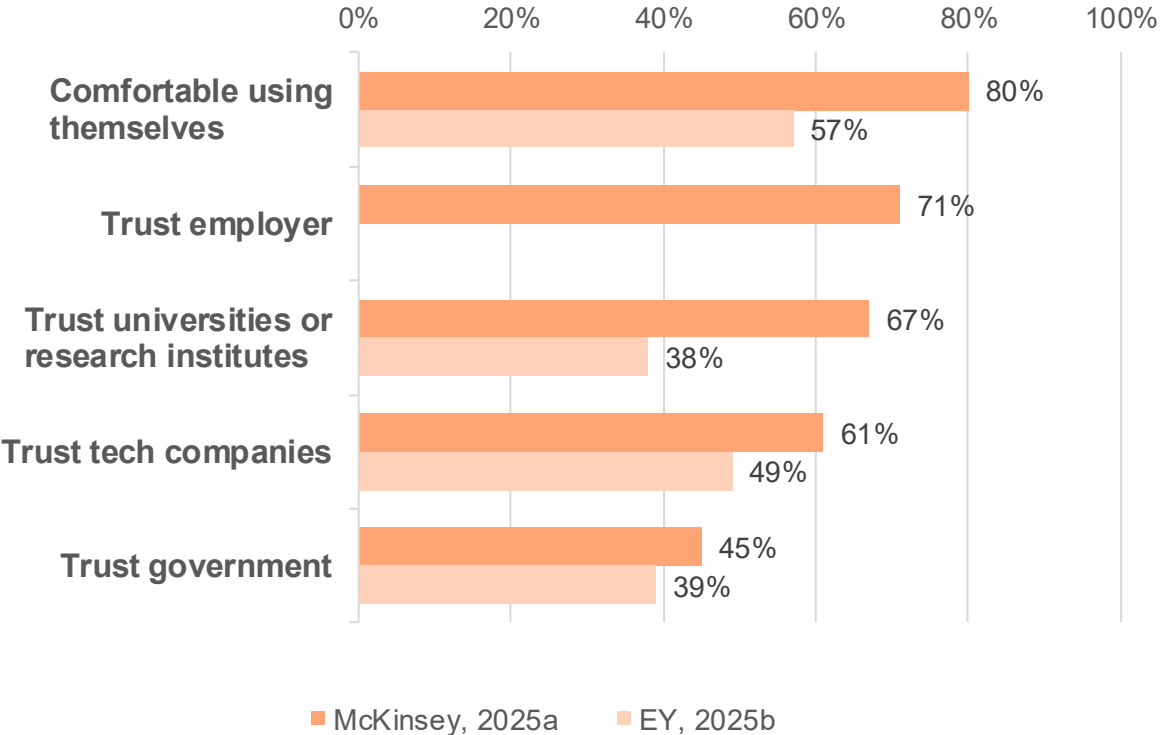
BCG, 2025 EY, 2025f Accenture, 2026 BCG, 2023 EY, 2025f Accenture, 2024a

People trust the abilities of themselves and their organizations – but are skeptical of big tech and the government

In general, people seem more confident about their own employer over other organisations, and themselves over any organisation¹

Confidence increases with usage and stage of adoption – **advanced* organizations are most confident about their alignment, yet least aligned with consumer concerns²**

Trust in safe use/deployment of AI



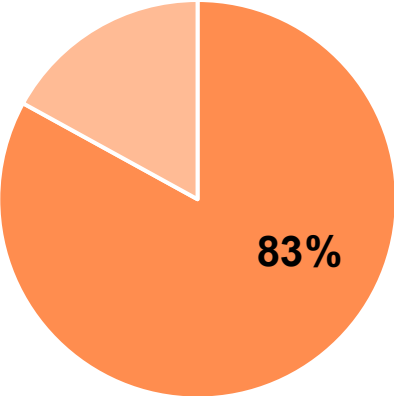
* Self-reported adoption stage
1: Deloitte, 2024d
2: EY, 2025c

Organizational and industry transformation

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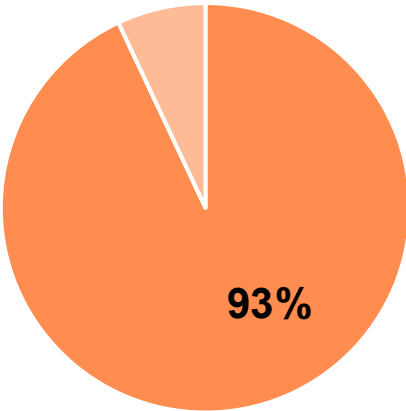
Many leaders affirm the transformational rhetoric surrounding AI

Competitive landscape will look different in two years



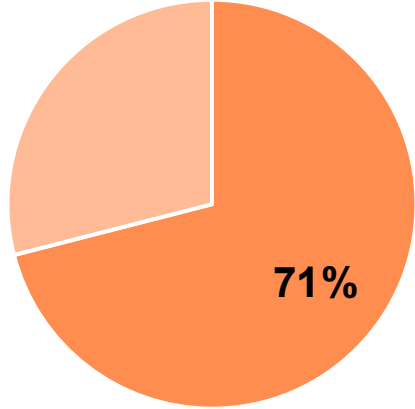
■ KPMG, 2025d

Ability to scale AI agents within 12 months will gain competitive advantage



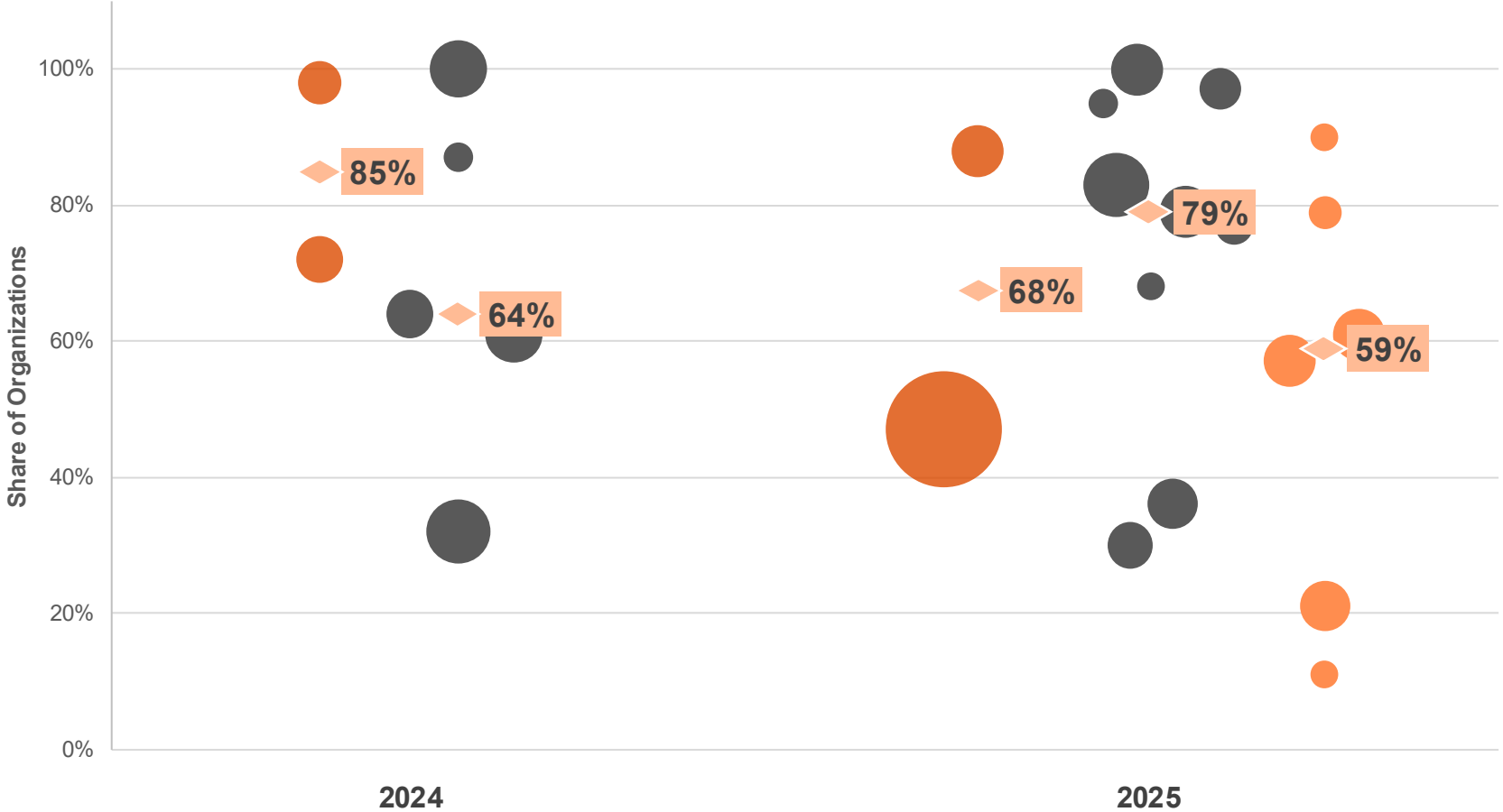
■ Capgemini, 2025b

AI agents are advancing so quickly that AGI will be a reality within 2 years



■ PWC, 2025a

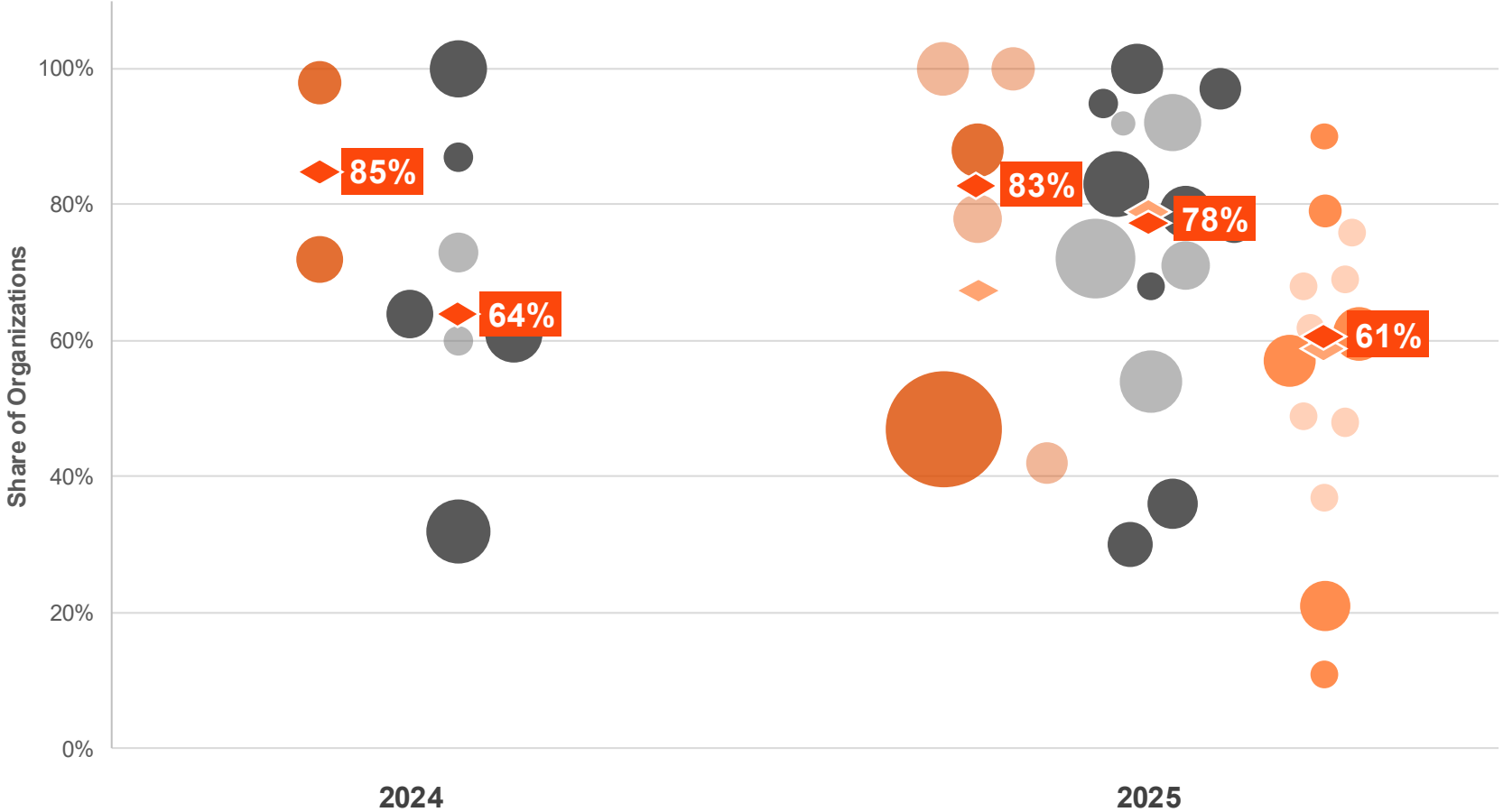
Most organizations have “adopted” AI – But definitions and numbers vary considerably based on the source



19 reports provide numbers on how many organizations have adopted/are using AI/GenAI/Agentic AI.

- AI (direct)
- GenAI (direct)
- AgenticAI (direct)
- Median (direct)

Most organizations have “adopted” AI – But definitions and numbers vary considerably based on the source



19 reports provide numbers on how many organizations have adopted/are using AI/GenAI/Agentic AI (*direct*)

15 reports provide detailed information about adoption-related activities from which adoption can be inferred* (*derived*)

32 reports in total

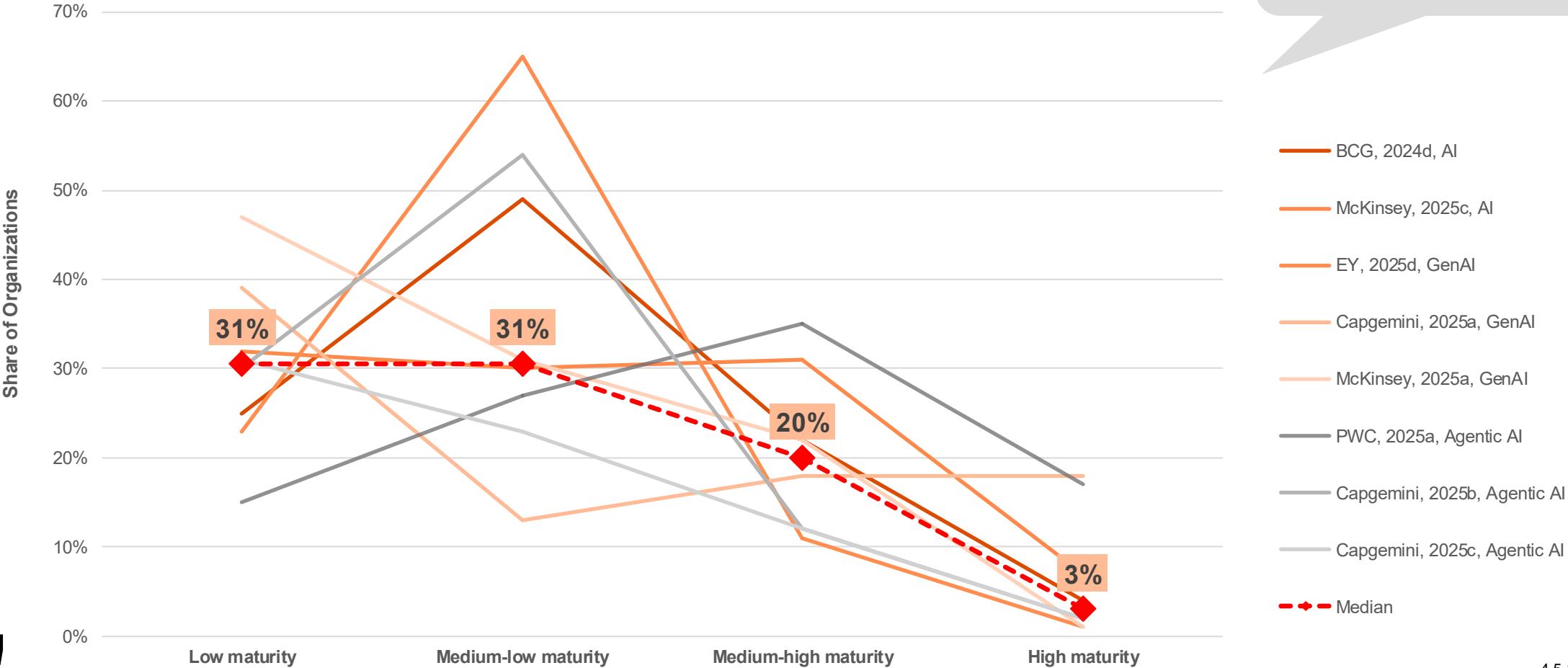
- AI (direct)
- GenAI (direct)
- AgenticAI (direct)
- AI (derived)
- GenAI (derived)
- AgenticAI (derived)
- Median (direct)
- Median (all)



* For this graph we considered a firm to have adopted AI, if they are at least experimenting or piloting its use.

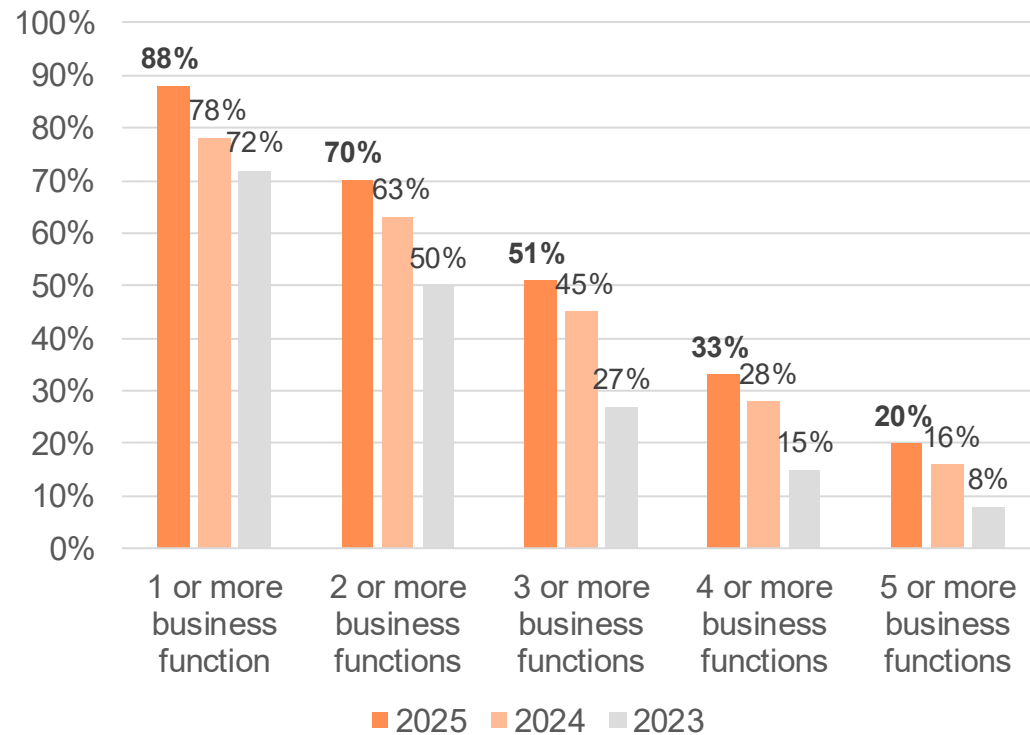
Majority are still in the early stages of adoption – But a few companies consider having “fully scaled” AI

8 reports provided adoption numbers with 4 comparable stages.

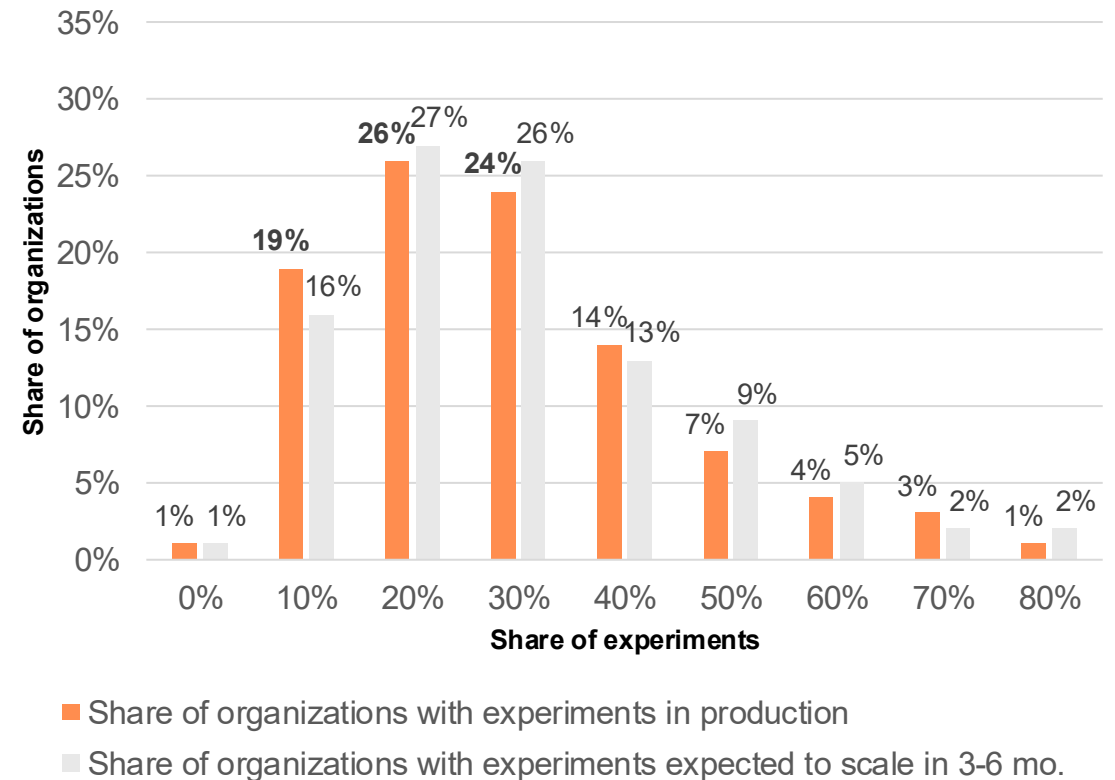


Adoption is unevenly diffused across the organization – One in three experiments move into production

Share of organizations adopting AI in...¹



Share of organizations that in have or plan to scale...²



1: McKinsey, 2024a; McKinsey, 2025b; McKinsey, 2025c
2: Deloitte, 2024c; Deloitte, 2025a

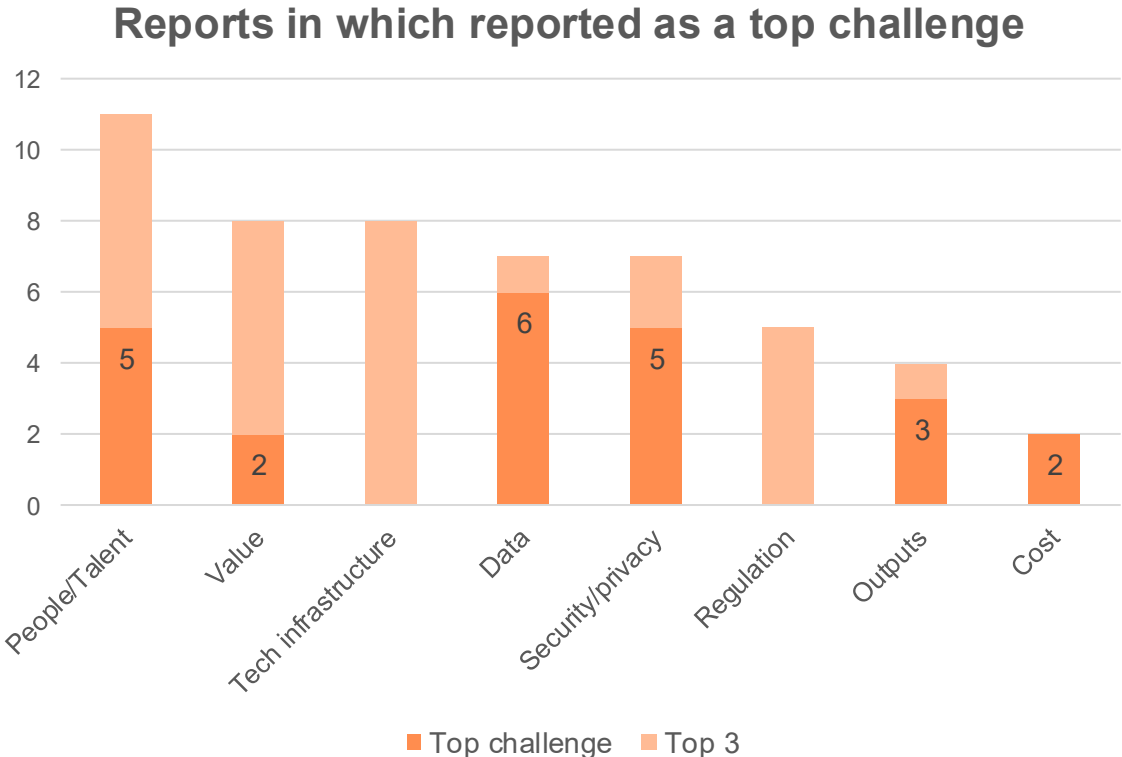
Data-related challenges remain a key bottleneck – But people and talent-related challenges are most commonly mentioned

23 reports provide numbers on how many face these challenges.

Organizations report challenges with

- Recruitment, skill gaps, change management and resistance
- Existing data infrastructure and quality
- Lack of ROI or difficulty of measuring and proving value

At early stages of adoption, challenges more often related to **data and executive support**, whereas in advanced stages more about **people and output quality**¹



Leading firms focus on leading people – Personnel is empowered by executive sponsorship and training

Compared to others, high-performing firms:

- Have more **ambitious growth and innovation related goals**
- Have strong **executive sponsorship** and oversight
- **Centralize AI decisions** (e.g., use case prioritization)
- More likely to track **well-defined KPIs**
- **Empower personnel** more broadly to use AI, and engage more in **reskilling and upskilling**

Defined by:

- Self-assessed expertise
- Financial performance
- Number of deployed use cases
- Following 'best practices'

Performing better:

- Better revenue & ROI, faster
- More likely to scale use cases
- Improved innovation capabilities
- Higher trust and employee engagement

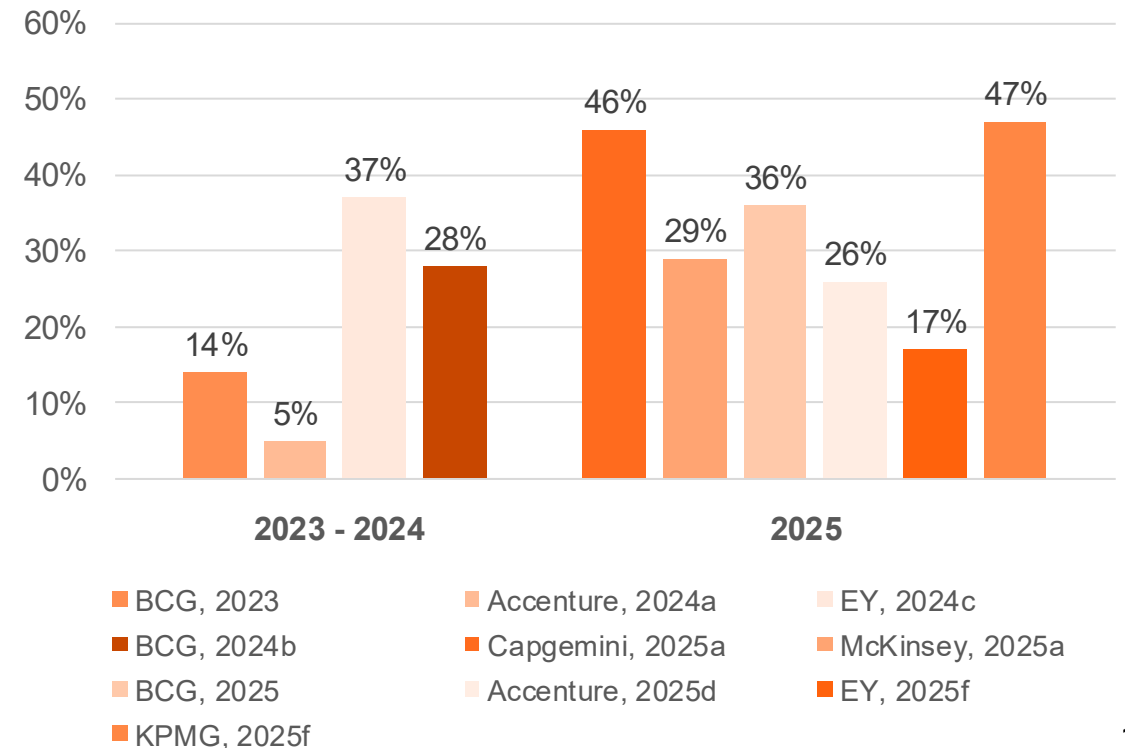
Training is considered crucial – But gap between actions and ambitions still exists

Almost all leaders think that GenAI requires **significant investment in upskilling**

Technical skill gaps are one of the top challenges for over half of managers¹

Other half believe their workforce is well prepared for AI, and their organization is supportive of employee experimentation with GenAI, but **employee perceptions are significantly lower**²

Less than half of the workforce has received adequate training



1: KPMG, 2025d; KPMG, 2025e

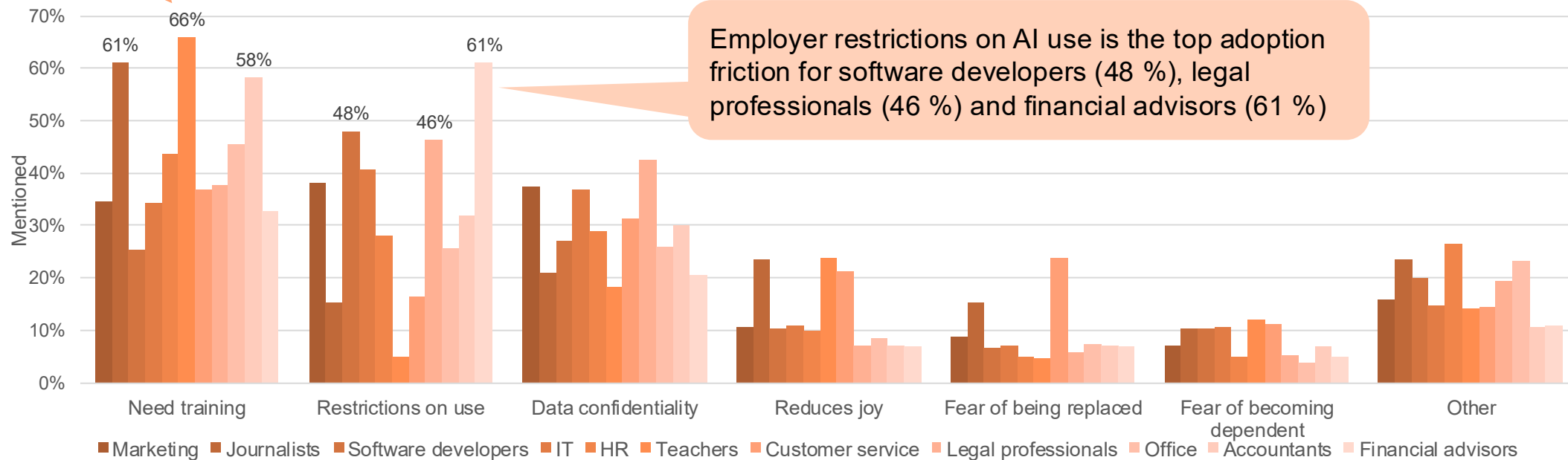
2: Accenture, 2025d; EY, 2025f

AI trainings are important for driving adoption, but the perceived need for training varies considerably

Humlum, A., & Vestergaard, E. (2025b). The unequal adoption of ChatGPT exacerbates existing inequalities among workers. *Proceedings of the National Academy of Sciences*, 122(1), e2414972121.

The need for training is the top adoption friction for journalists (61%), teachers (66%) and accountants (58%)

Adoption frictions*



Employer restrictions on AI use is the top adoption friction for software developers (48%), legal professionals (46%) and financial advisors (61%)

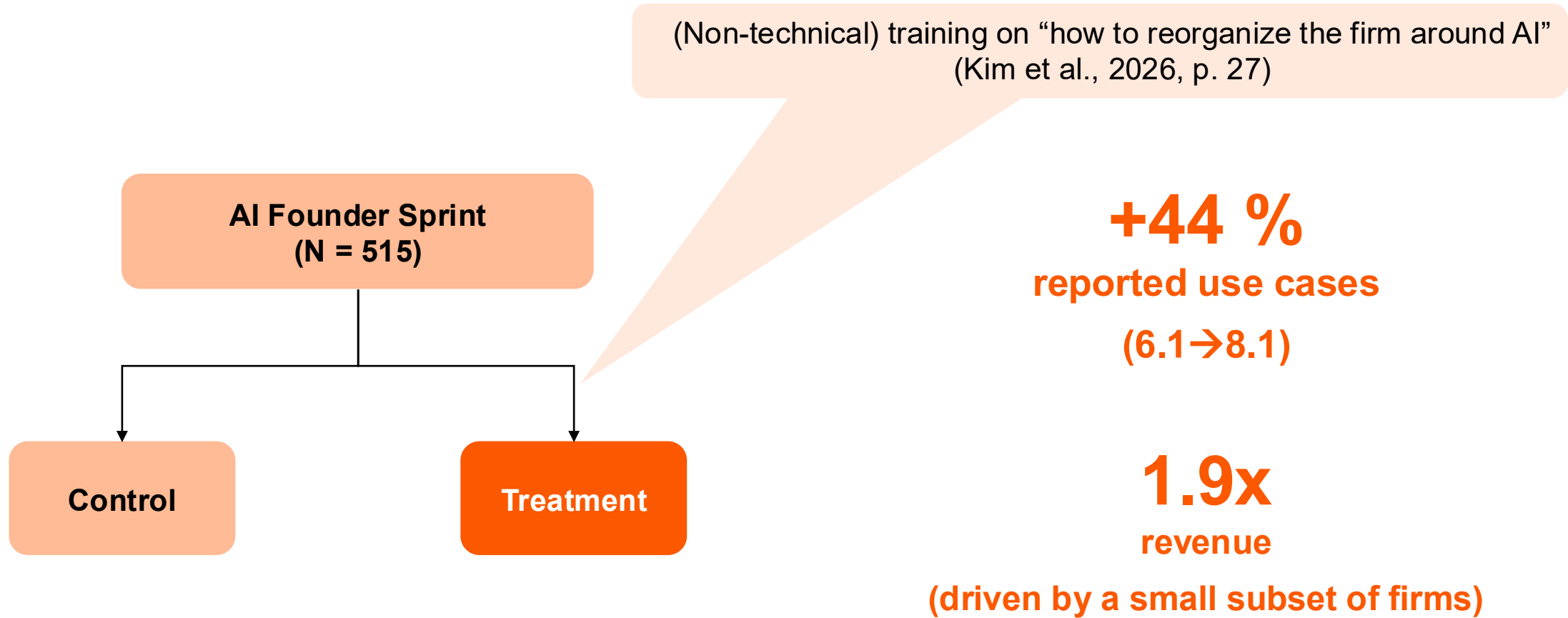
Data source: Humlum & Vestergaard (2025b, Table S17)



* Reasons for not using ChatGPT despite belief it could lead to large time savings

AI training can help firms address the “mapping problem”

Kim, H., Kim, D., & Koning, R. (2026). Mapping AI into Production: A Field Experiment on Firm Performance. *INSEAD Working Paper*. <https://ssrn.com/abstract=6513481>



Results

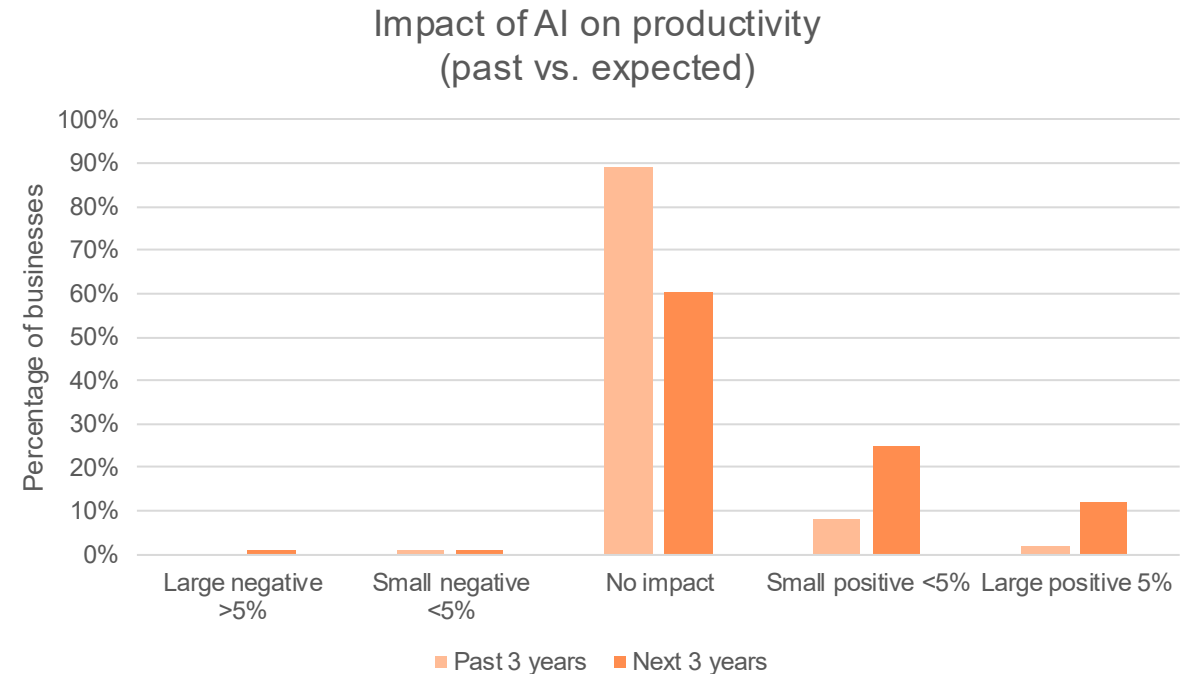
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Individual-level productivity gains have not fully aggregated to the firm-level – yet

Experimental studies show **individual-level productivity gains**¹

Significant **firm-level productivity growth is more future hope than current reality**²

Compelling **research regarding firm-level productivity effects is only emerging**, but some encouraging early signals exist³



Data source: Yotzov et al. (2026, Figure 10-11)

¹Brynjolfsson et al. (2025), Dell'Acqua et al. (2026), Noy & Zhang (2023)

²Yotzov et al. (2026), see also Humlum & Vestergaard (2025b)

³Aldasoro et al., (2026), Baslandze et al. (2026), Sarkar (2026)

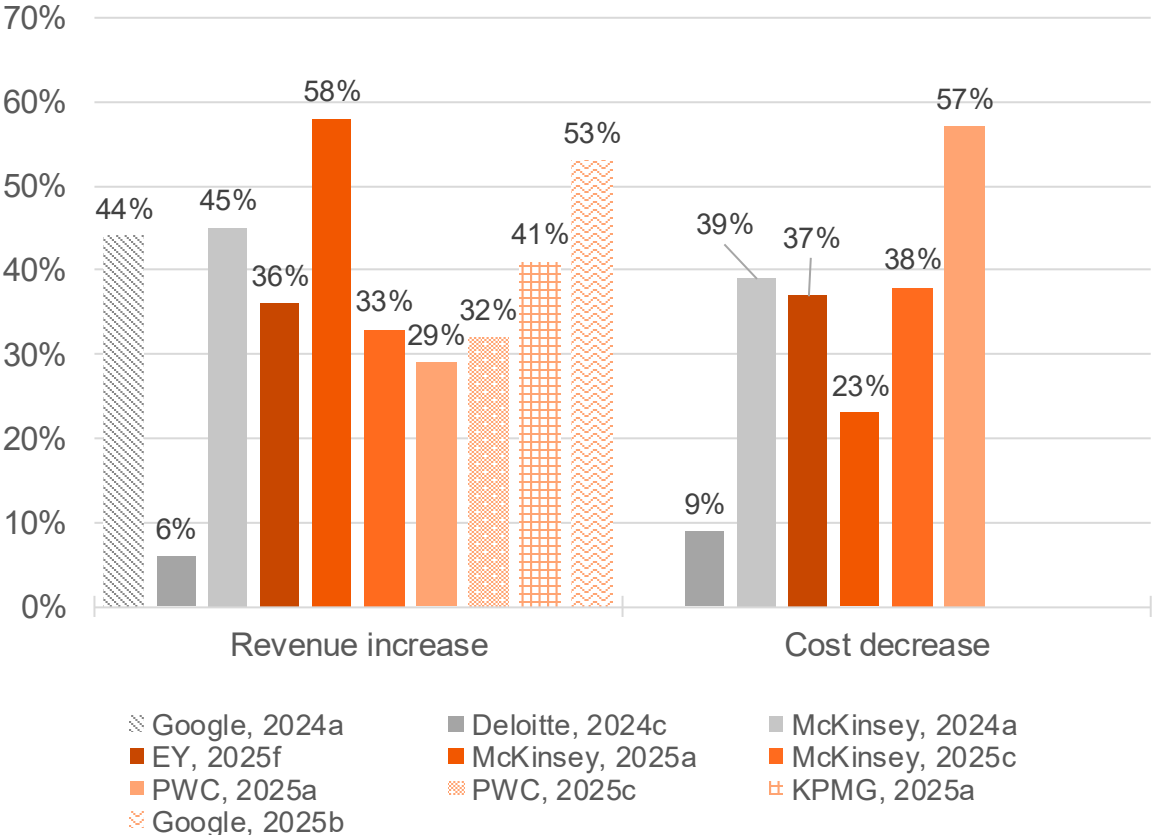
Executives often report positive bottom-line impact of AI – But there is reason to not take self-reported estimates at face value

Executives often report self-assessed positive results, or positive expectations for:

- ROI
- EBIT, bottom-line, revenue, costs and profitability
- Productivity and time efficiencies
- Innovation and growth
- Customer and employee experience

However, unproven ROI is among the most cited challenges¹, many struggle with measuring the impact of AI initiatives² and **only a fraction of organizations report the results to the C-level³**

Share reporting positive monetary results

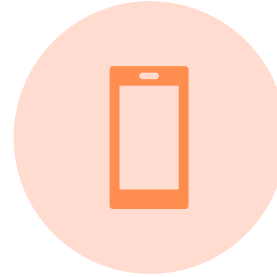


1: BCG, 2024d; Bain, 2024b; PWC, 2025a; Deloitte, 2025a; EY, 2025a
 2: Deloitte, 2024c; Capgemini, 2025c
 3: Deloitte, 2024c

Generative AI is a unique technological transformation – with some familiar features



Speed of adoption is unprecedentedly fast



Publicly available tools and individuals are the engine of change



Top management support is key to company-level adoption and transformation



AI transforms only those companies that transform themselves

A!

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**Kiitos
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