

AI enters its operating era

AI adoption is accelerating. The focus now is turning widespread use into sustained value.

Highlighting key findings from	3,000 C-suite leaders	3,000 Employees	19 Industries	21 Countries
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Growth expectations moderate as employee confidence rises

Amid broader uncertainty, leaders are recalibrating their outlook for growth and hiring. At the same time, employees are feeling more secure about what comes next.

71%	61%	66%
of C-suite leaders expect domestic revenue growth over the next 12 months ↓ from 90% in January	of leaders expect hiring to increase ↓ from 74% in January	of employees feel secure in their role ↑ from 48% in January

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Despite a more measured business outlook, employee confidence remains high.

AI investment is holding as the focus shifts to operating economics

Leaders remain committed to AI, with growing focus on the economics of scaling

75%	49%	69%
plan to increase AI investment over the next 12 months	would continue increasing their AI investment even if a bubble were to burst	are scrutinizing AI operating costs more closely than a year ago

AI tokenomics enters the C-suite agenda

41%	51%
actively manage AI token economics	are beginning to track it

Yet the discipline hasn't fully reached employees

80%	32%
understand that how they use AI can affect costs	have received clear guidance on cost-effective use

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AI is moving from adoption economics to operating economics.

Use is scaling faster than operating models are changing

Daily use is rising rapidly across leaders and employees

41%	43%
of leaders use generative AI daily ↑ from 27% in July	of employees use it daily ↑ from 30% in July

But true reinvention remains rare

15%	20%
of leaders are redesigning end-to-end processes with AI at the core	are actively deploying AI agents across multiple functions

Expectations are high while widespread value realization remains limited

53%	20%	25%
expect measurable ROI from AI investments within 12 months	even expect it within six months	report widespread and sustained business value today

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Rapidly growing AI use has yet to fully translate into widespread and sustained business value.

Cyber resilience is both an AI value case and a stress test

48%
of leaders rank cyber defenses and business resilience among the areas where AI has delivered the greatest value to date

At the same time, AI is reshaping the threat landscape

55%	53%	56%
cite AI-generated phishing and social engineering as a top cyber threat	cite AI-assisted malware development	of employees feel confident detecting AI-powered threats

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AI is already delivering value in cybersecurity, but preparedness needs to keep pace.

Work is becoming more productive, and more demanding

Employees are increasingly turning to AI as a colleague

64%	50%
try AI tools before asking a colleague for help	regularly work with AI agents

And employees are seeing tangible benefits

82%	75%
say AI has increased productivity	say it has increased job satisfaction

But the productivity dividend comes with new demands

50%	50%	48%
say the expected speed of work has increased	say the need to review and verify outputs has increased	struggle to keep current as AI tools rapidly change

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AI is delivering tangible benefits for employees, but also changing the demands of work.

From adoption to advantage

Four priorities for AI's operating era:

- 1. Connect AI to value**

Move beyond widespread use to target high-value work, end-to-end processes and measurable outcomes.
- 2. Manage the economics**

Match the right models to the right work, and put the governance and controls in place to scale efficiently.
- 3. Build in resilience**

Embed cyber governance, detection, training and accountability as AI expands.
- 4. Redesign work**

Create connected workflows and effective human-AI collaboration, with the skills and guidance employees need.

Adoption brought AI into the enterprise. Operating discipline is needed to turn it into sustained value.

