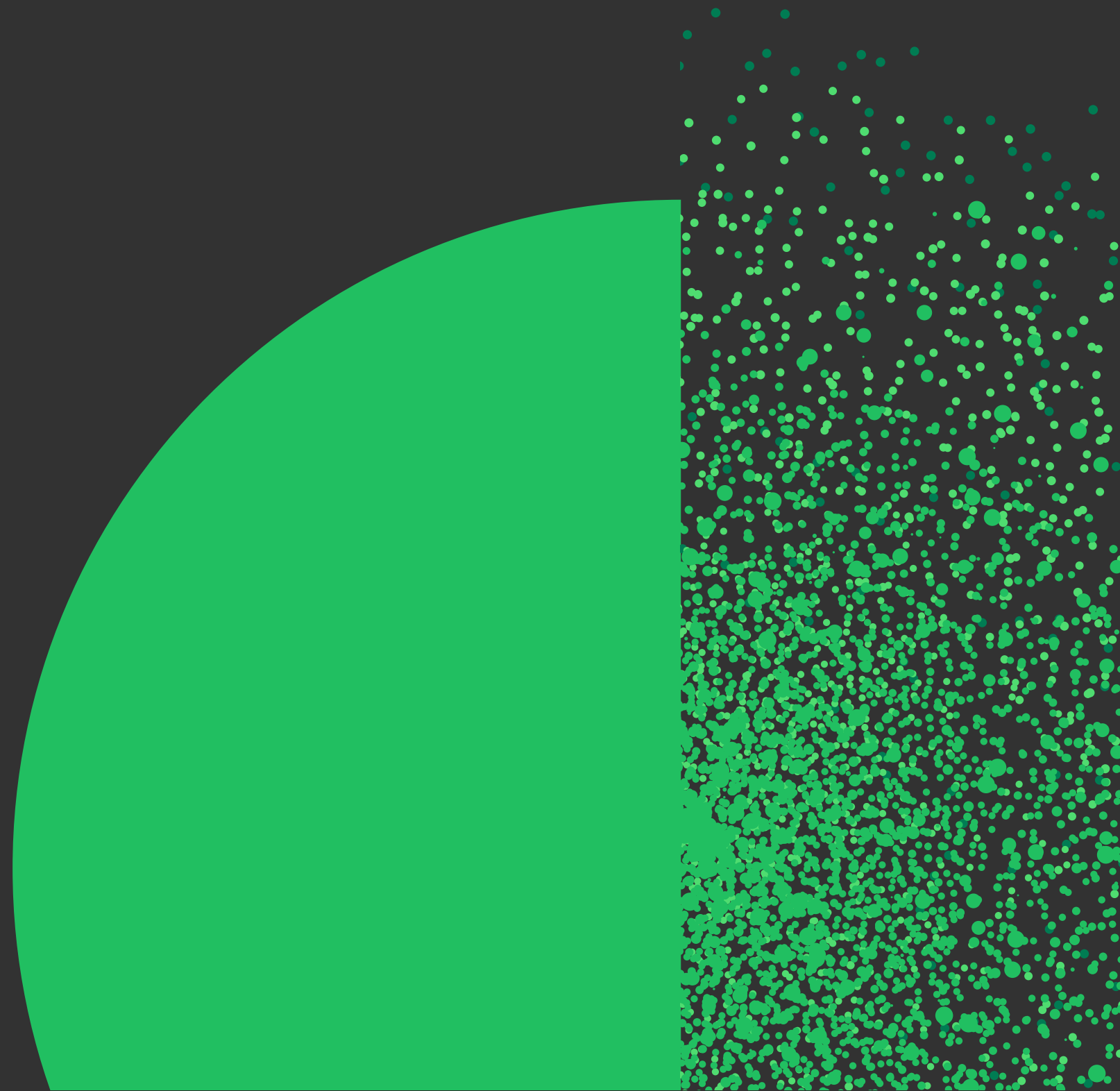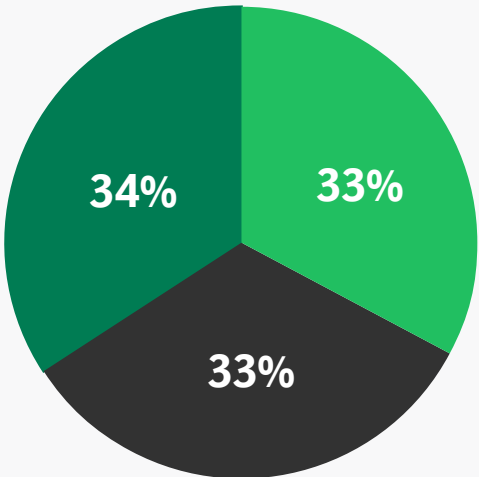# AI at Work: Friend and Foe

JUNE 2024

Survey parameters
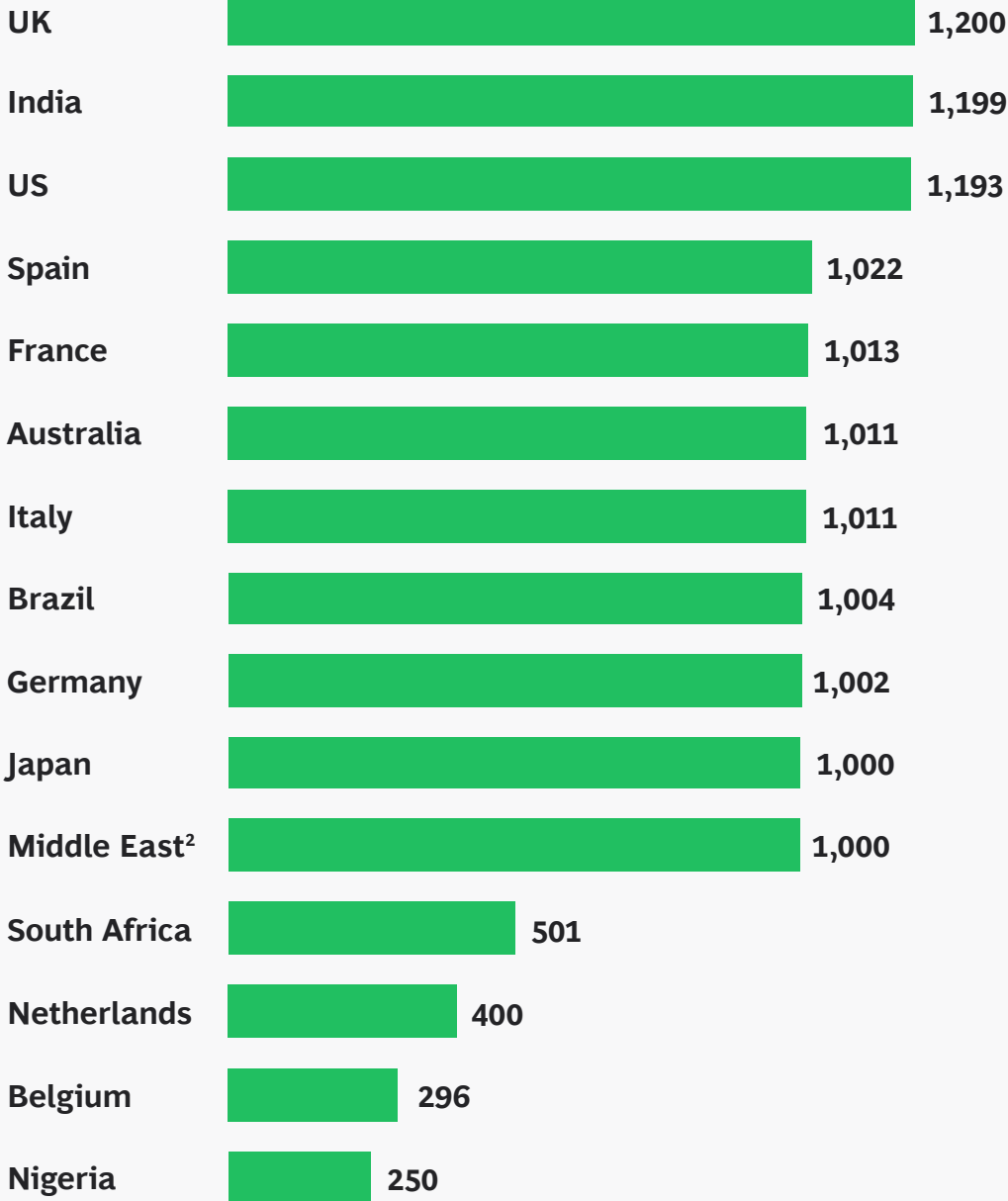
13,102
respondents

Role in the company

- 33% Frontline employees[1]
- 33% Managers
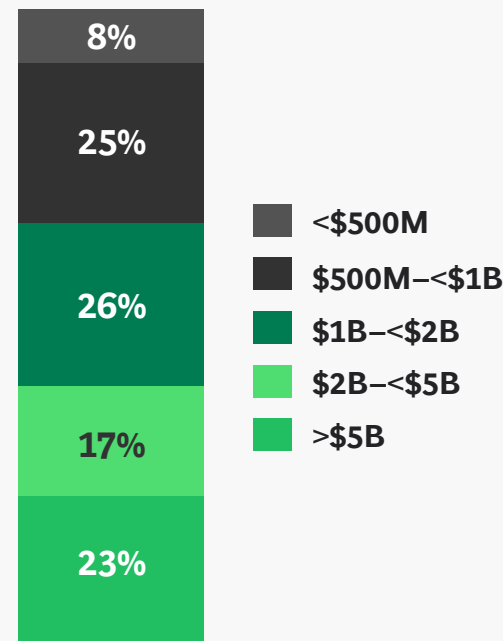- 34% Leaders

Number of respondents by market

Market	Respondents
UK	1,200
India	1,199
US	1,193
Spain	1,022
France	1,013
Australia	1,011
Italy	1,011
Brazil	1,004
Germany	1,002
Japan	1,000
Middle East[2]	1,000
South Africa	501
Netherlands	400
Belgium	296
Nigeria	250

Age split

- 3% 18–24
- 20% 25–34
- 42% 35–44
- 23% 45–54
- 10% 55–64
- 2% 65+

Company revenues

- 8% <$500M
- 25% $500M–<$1B
- 26% $1B–<$2B
- 17% $2B–<$5B
- 23% >$5B

Industry overview

- 24% Financial institutions
- 22% TMT
- 16% Consumer
- 12% Health care
- 11% Energy
- 3% Manufacturing
- 2% Public sector
- 9% Other
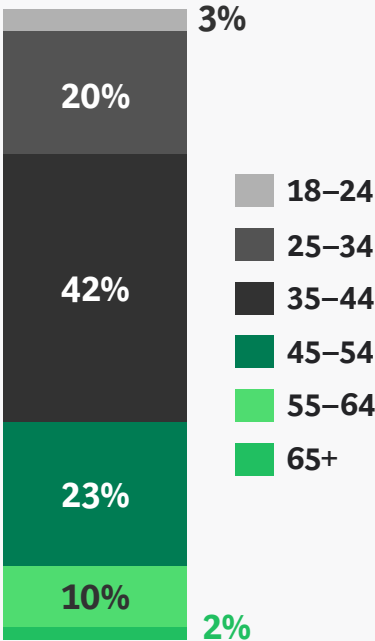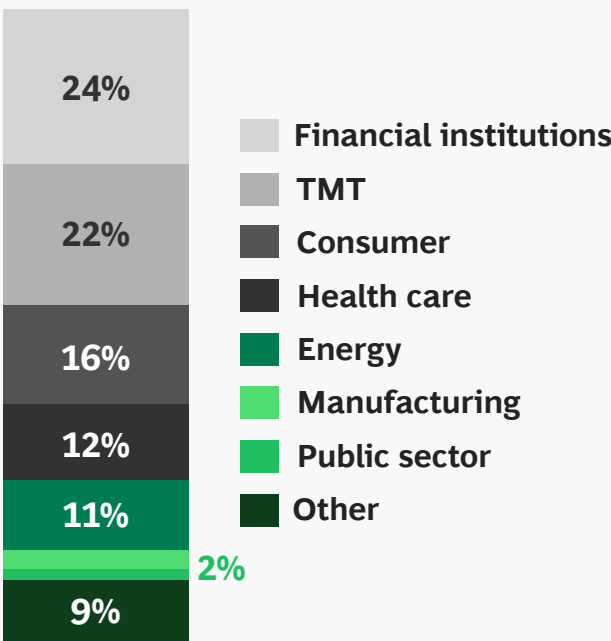
Source: AI at Work (2024), n = 13,102.
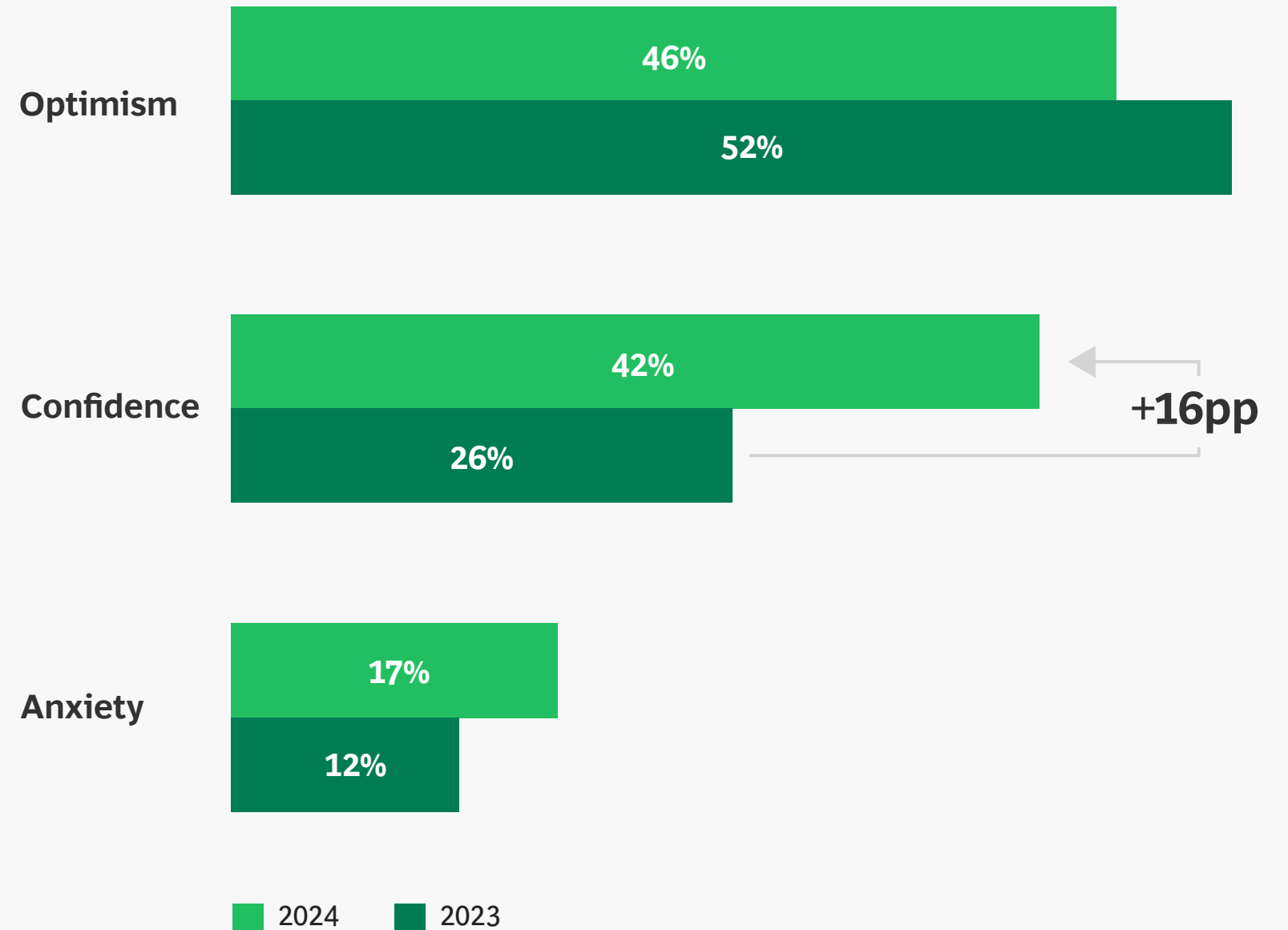**Note:** TMT = technology, media, and telecommunications.
[1]Individual contributors, without managerial responsibility. [2]We received responses in the Middle East from Kuwait, Qatar, Saudi Arabia, and the UAE.

Five key findings

1   **The AI Paradox.** Worker confidence in GenAI has grown since 2023 (up 16 percentage points to 42%). So has fear of job loss (up 6 percentage points to 42%).

2   **A Gap in Confidence.** Frontline employees (33%) are less confident about GenAI than managers (41%) and leaders (50%).

3   **And a Gap in Training.** Frontline employees (28%) are far less likely than leaders (50%) to have received training in how AI will affect their job.

4   **North-South Divide.** The Global South is more confident about GenAI than the Global North. In India, 54% of respondents are confident, compared with 34% in the US.

5   **Beyond Productivity.** Most GenAI users (58%) are saving at least five hours a week with the tool, with the focus now shifting to how to use that freed-up time to generate value and joy.

Cautious optimism around AI at work endures
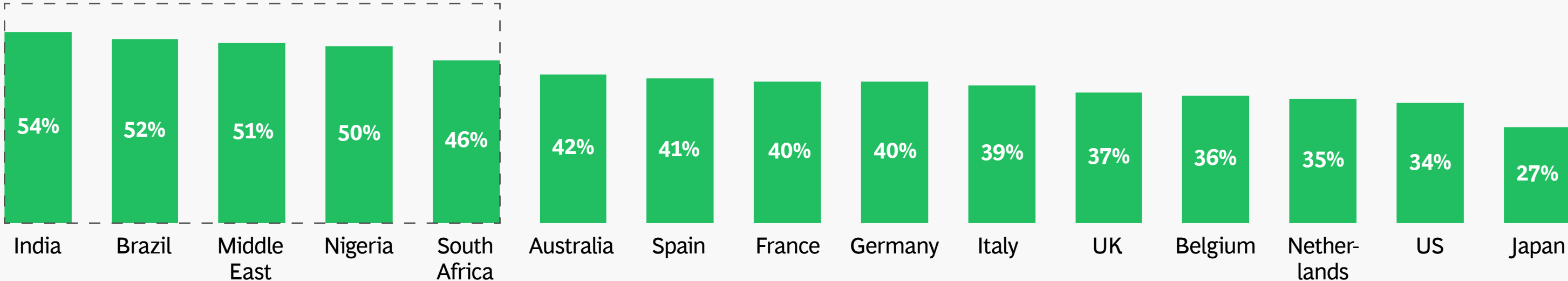
Shifting sentiments around AI's impact on work

Optimism
- 46% (2024)
- 52% (2023)

Confidence
- 42% (2024)
- 26% (2023)
- +16pp

Anxiety
- 17% (2024)
- 12% (2023)

Legend: 2024, 2023

Confidence in GenAI is higher and anxiety is generally lower in the Global South

Confidence
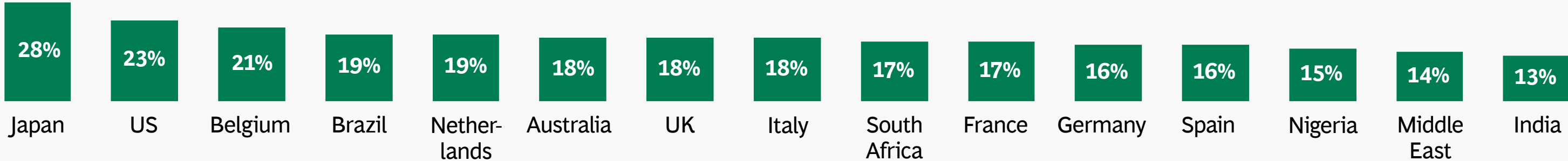
India	Brazil	Middle East	Nigeria	South Africa	Australia	Spain	France	Germany	Italy	UK	Belgium	Netherlands	US	Japan
54%	52%	51%	50%	46%	42%	41%	40%	40%	39%	37%	36%	35%	34%	27%

Anxiety

Japan	US	Belgium	Brazil	Netherlands	Australia	UK	Italy	South Africa	France	Germany	Spain	Nigeria	Middle East	India
28%	23%	21%	19%	19%	18%	18%	18%	17%	17%	16%	16%	15%	14%	13%

⬚ Global South

The differences across industries are less pronounced than those across geographies

Confidence
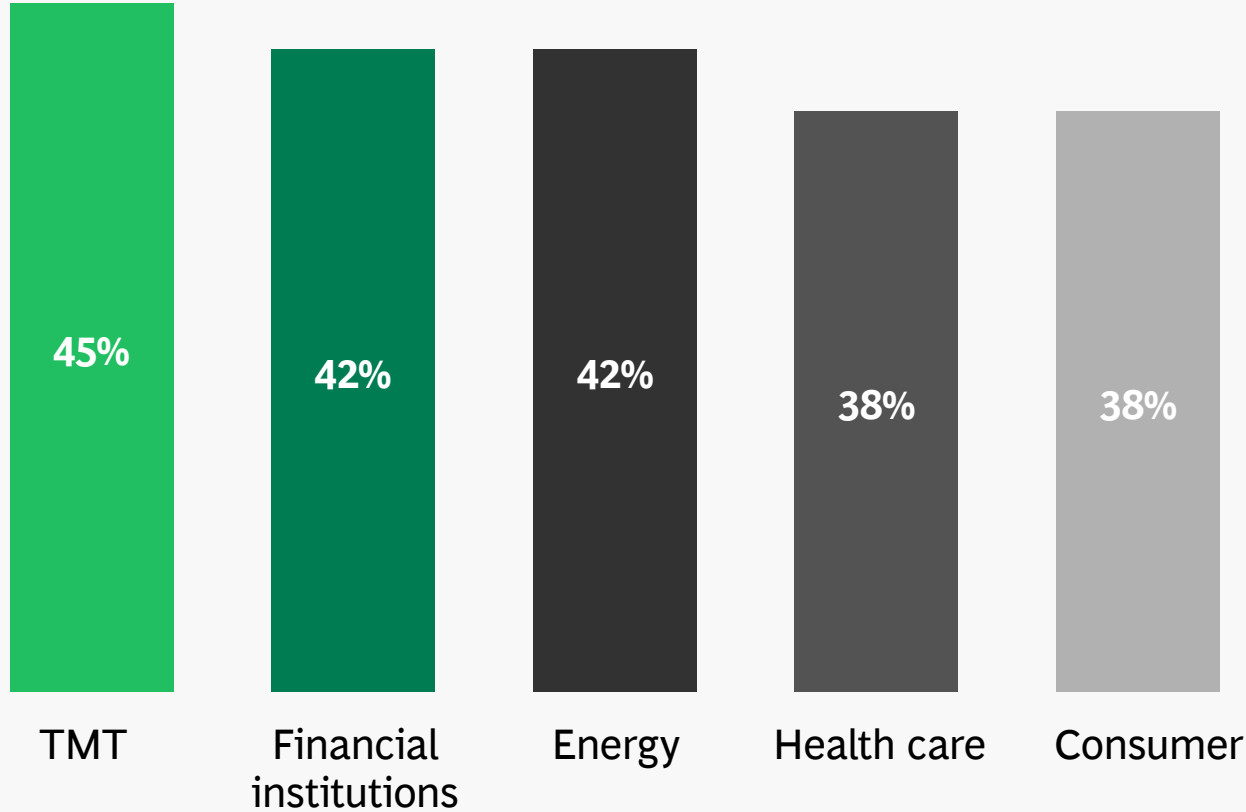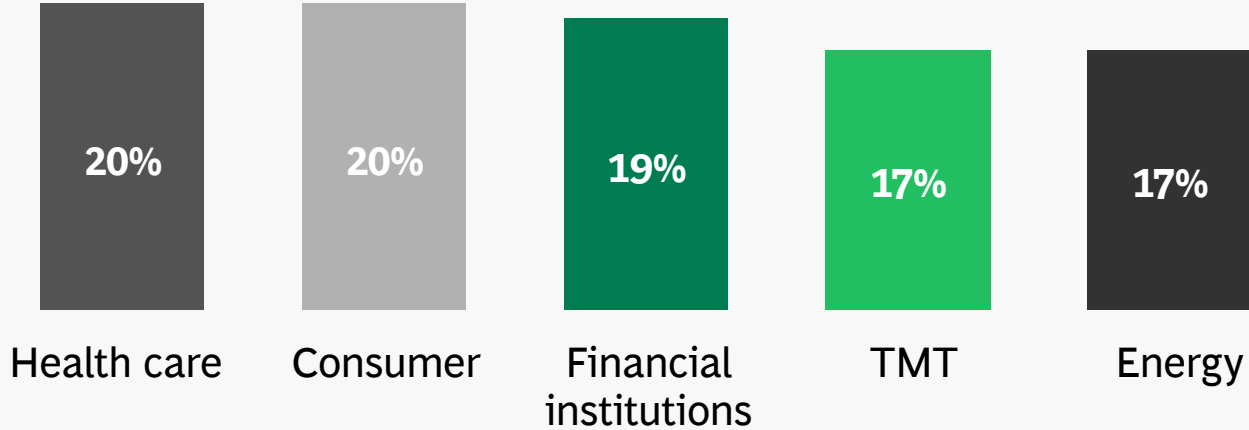
- TMT: 45%
- Financial institutions: 42%
- Energy: 42%
- Health care: 38%
- Consumer: 38%

Anxiety

- Health care: 20%
- Consumer: 20%
- Financial institutions: 19%
- TMT: 17%
- Energy: 17%

Frontline employees are less confident and more anxious about GenAI than their bosses are

Confidence
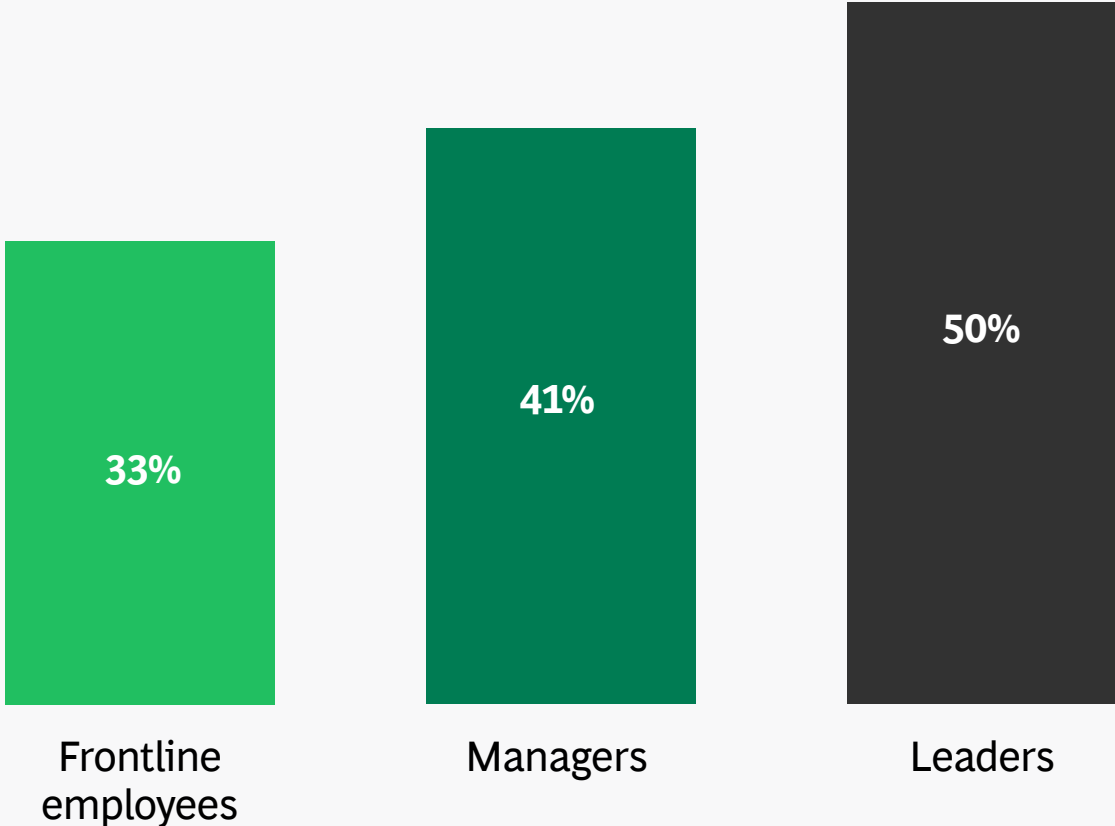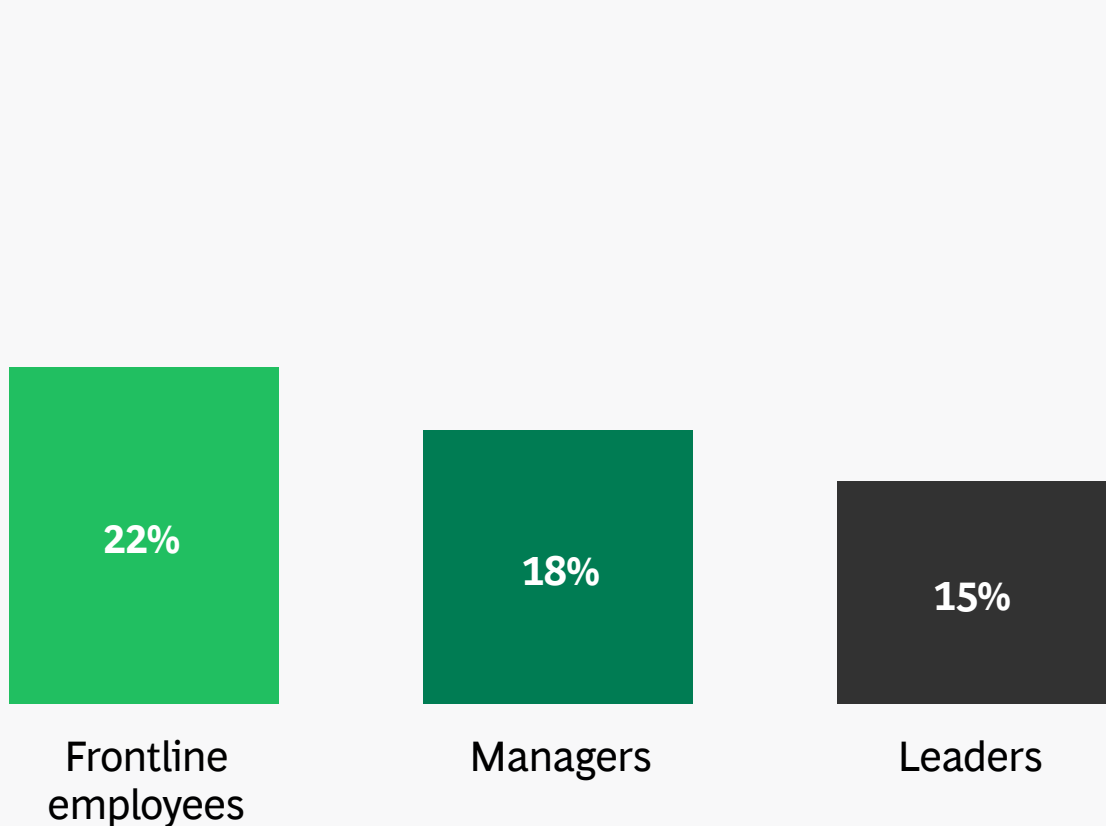
Frontline employees	Managers	Leaders
33%	41%	50%

Anxiety

Frontline employees	Managers	Leaders
22%	18%	15%

Confidence increases with more frequent usage

Confidence
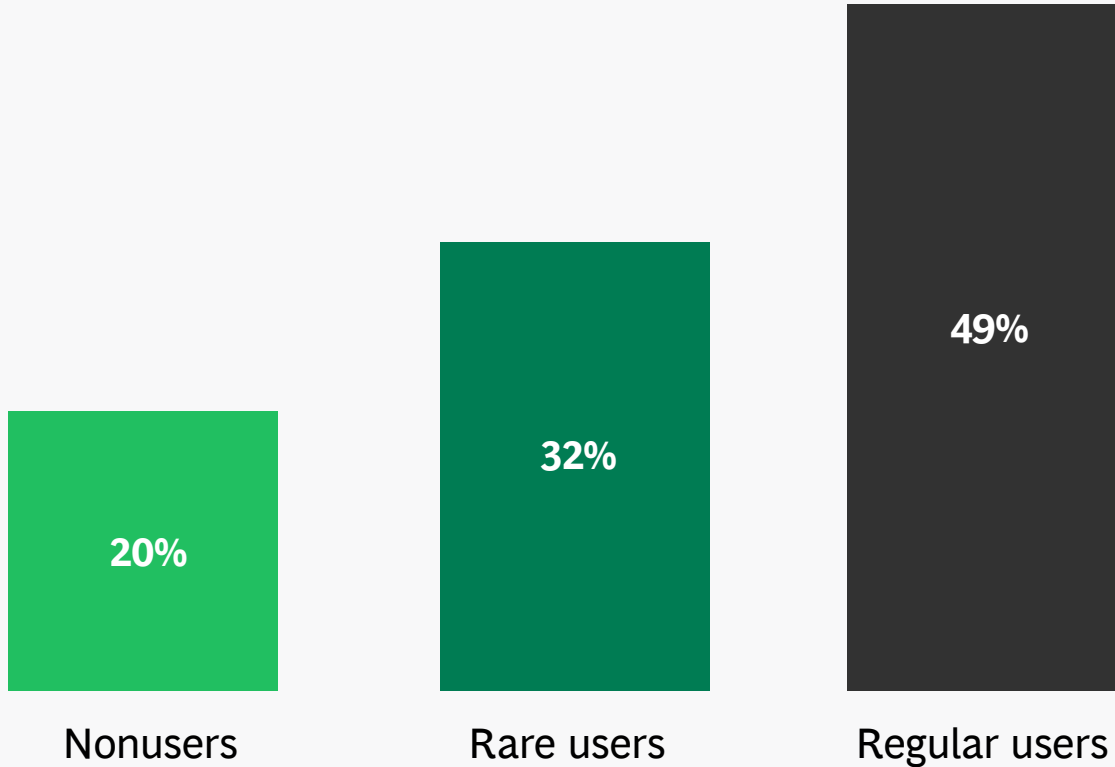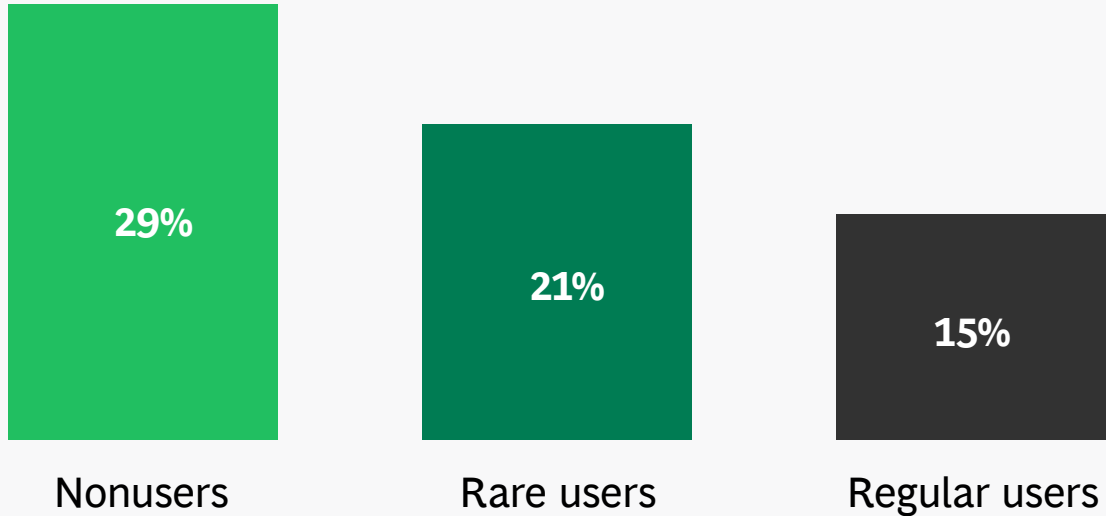
Nonusers 20%	Rare users 32%	Regular users 49%

Anxiety

Nonusers 29%	Rare users 21%	Regular users 15%

Frontline employees have rapidly increased their GenAI use

Regular GenAI usage across worker levels
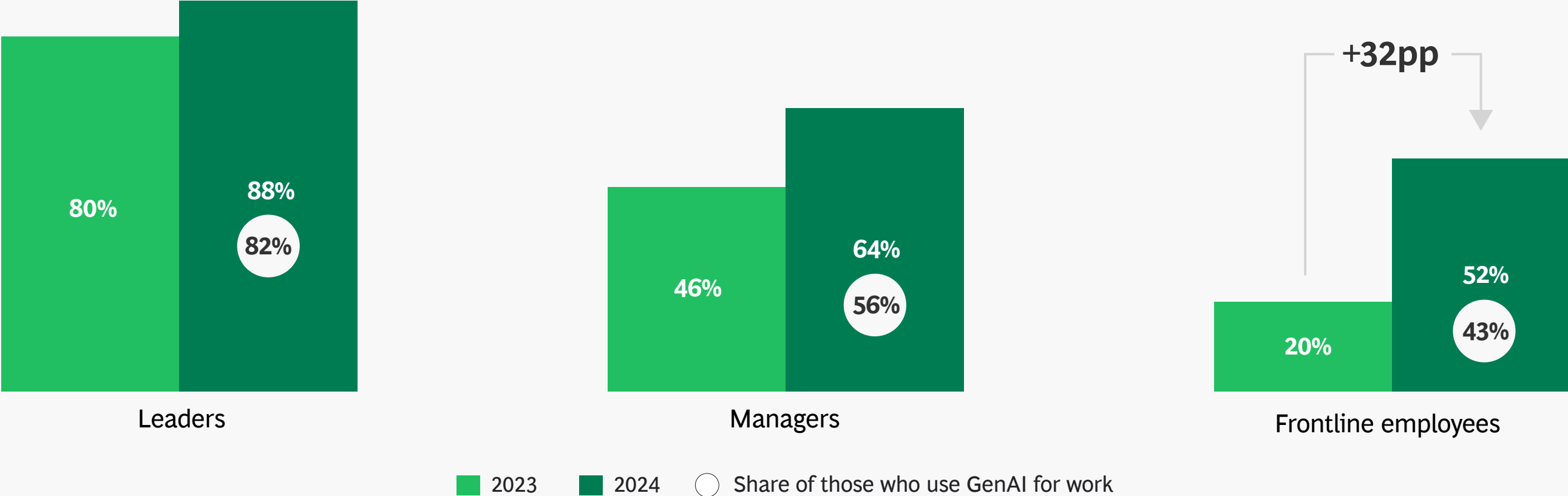
Leaders
- 80%
- 88%
- 82%

Managers
- 46%
- 64%
- 56%

Frontline employees
- +32pp
- 20%
- 52%
- 43%

Legend: ■ 2023　■ 2024　○ Share of those who use GenAI for work

Regular use of GenAI is higher in the Global South than in the Global North

Regular GenAI usage at work across the Global North and the Global South
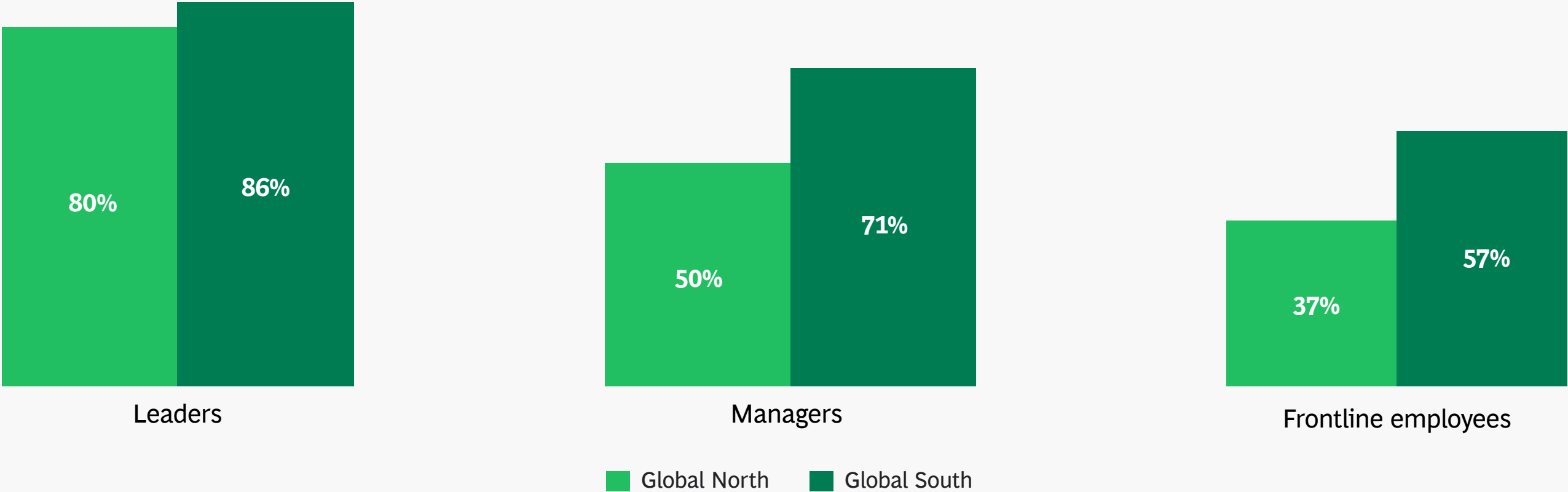
Leaders
- Global North: 80%
- Global South: 86%

Managers
- Global North: 50%
- Global South: 71%

Frontline employees
- Global North: 37%
- Global South: 57%

Legend: ■ Global North ■ Global South

GenAI is providing **real-world benefits**, particularly in productivity

Share of users who agree that GenAI has...

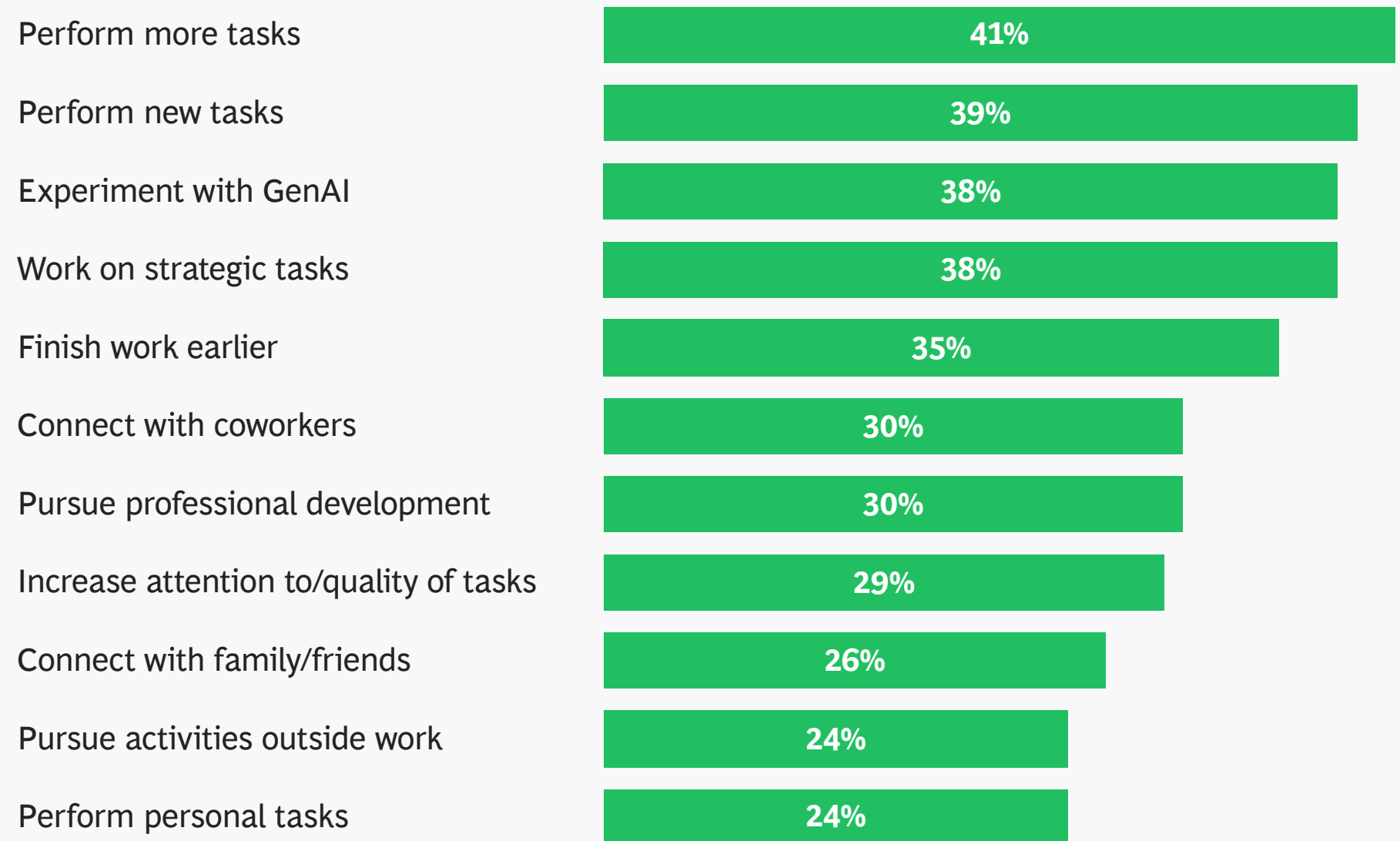| Benefit	Share
saved them time	84%
increased their speed	83%
improved the quality of their work	81%
freed up time for more strategic work	81%
decreased the time they spend on administrative tasks	80%

58%

of respondents who use GenAI for work believe that they are **saving 5+ hours a week**[1]

GenAI allows people to do more work and smarter work

What GenAI users are doing with time saved[2]

Perform more tasks	41%
Perform new tasks	39%
Experiment with GenAI	38%
Work on strategic tasks	38%
Finish work earlier	35%
Connect with coworkers	30%
Pursue professional development	30%
Increase attention to/quality of tasks	29%
Connect with family/friends	26%
Pursue activities outside work	24%
Perform personal tasks	24%

The Global South is leading the way in using time saved by GenAI

Employee experience
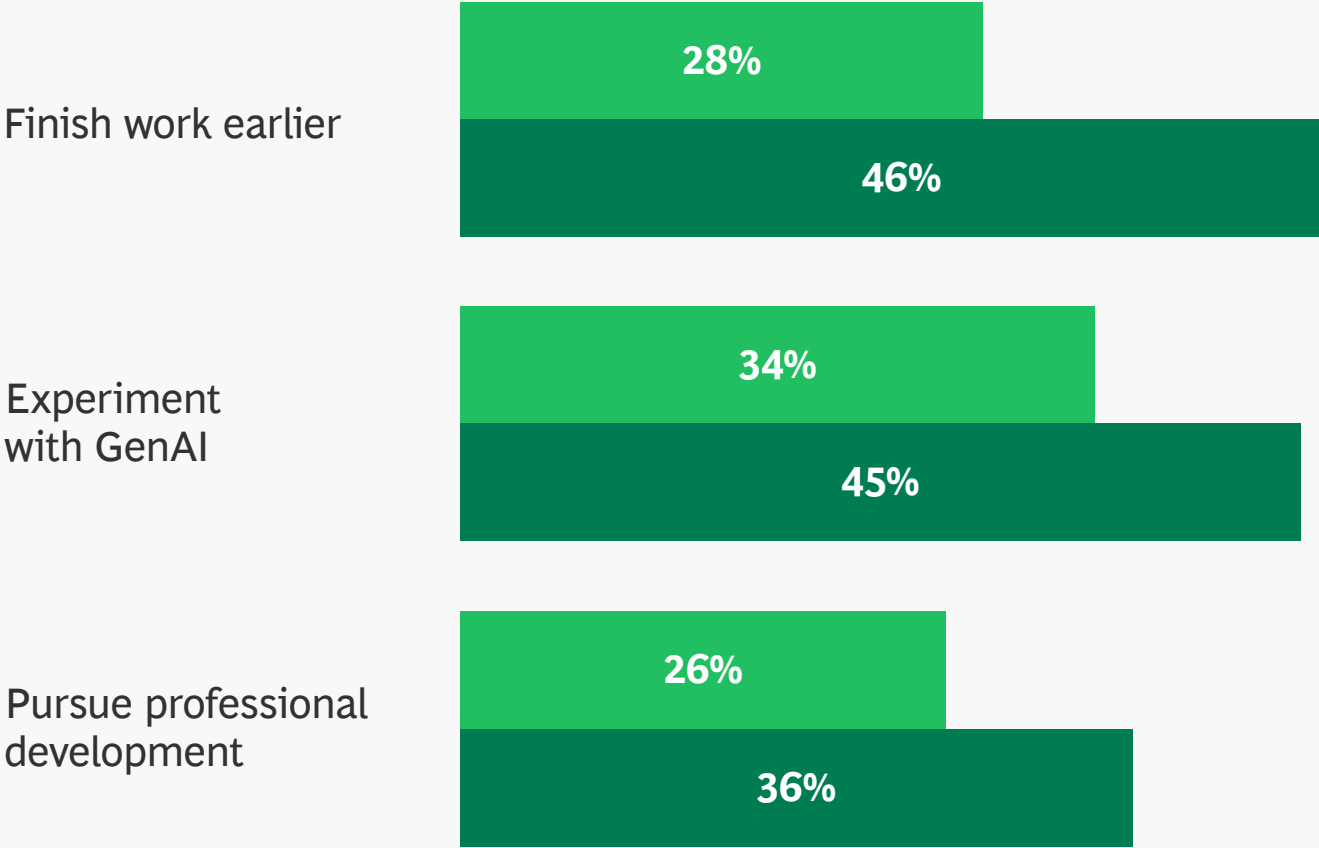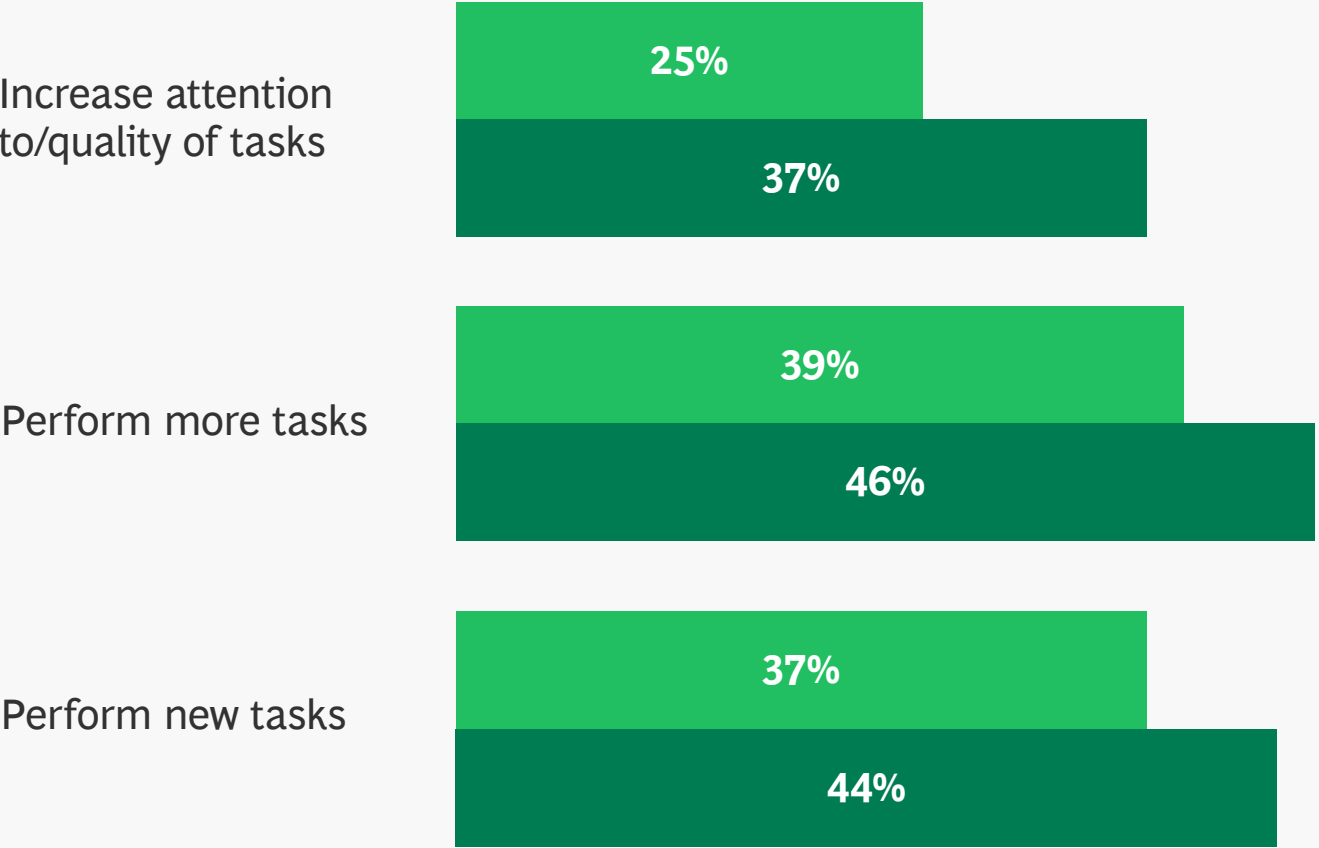
Finish work earlier
- Global North: 28%
- Global South: 46%

Experiment with GenAI
- Global North: 34%
- Global South: 45%

Pursue professional development
- Global North: 26%
- Global South: 36%

Productivity

Increase attention to/quality of tasks
- Global North: 25%
- Global South: 37%

Perform more tasks
- Global North: 39%
- Global South: 46%

Perform new tasks
- Global North: 37%
- Global South: 44%

Legend: ▇ Global North ▇ Global South

Caution: GenAI may save time, but it may also **eliminate jobs**

79%

believe that AI and GenAI will profoundly transform their jobs, up from **75%** in 2023

42%

think that their job might not exist in the next decade, up from **36%** in 2023

More caution: Workers who regularly use GenAI are more likely than others to fear losing their jobs
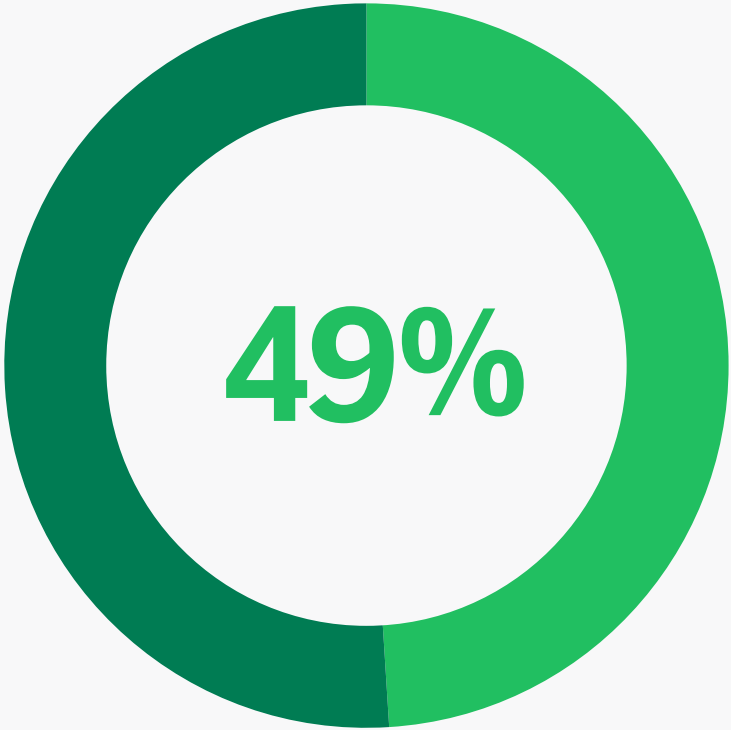
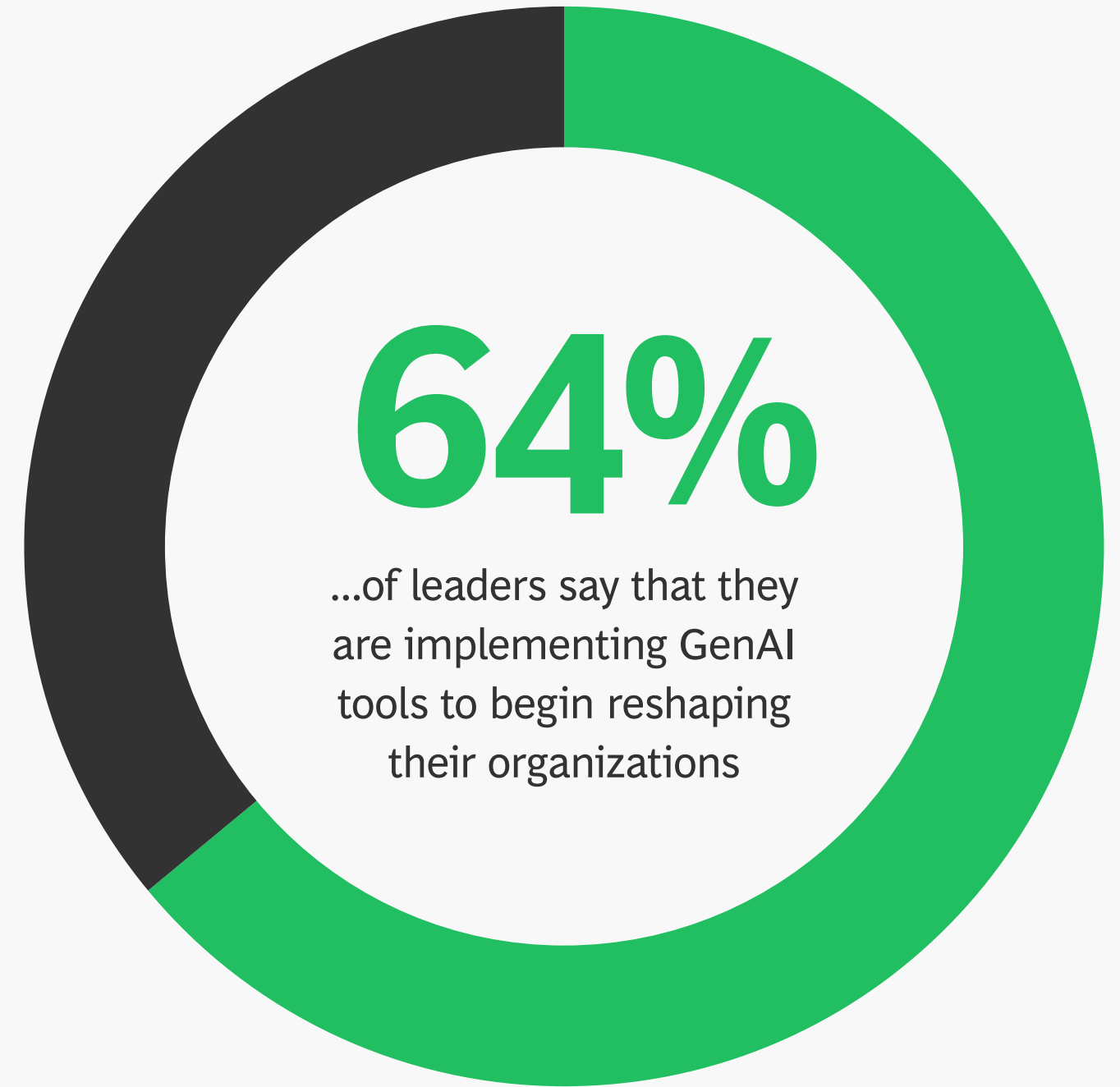**Share of GenAI users and nonusers who think that their jobs could disappear over the next decade**

24%

Nonusers[1]

33%

Rare users[2]

49%

Regular users[3]

Leaders must transform **their organization** to accommodate GenAI

64%

...of leaders say that they are implementing GenAI tools to begin reshaping their organizations

Leaders worry about workers' level of AI literacy today and the cost of implementation tomorrow

Top five challenges today

1	Lack of AI and GenAI literacy in nontech roles
2	Uncertainty about when to use GenAI
3	Lack of AI and GenAI technology talent
4	Cost of implementing and running GenAI
5	Lack of AI/GenAI-specific pilots in the rollout process

Top five challenges in the next five years

1	Cost of implementing and running GenAI
2	Difficulty redeploying workers effectively
3	Difficulty changing workflows
4	Lack of funds/budget for any innovation investment
5	Lack of AI and GenAI literacy in nontech roles

Frontline employees want more **time and training** to learn GenAI

Five biggest challenges around GenAI

1 I had insufficient time to learn how to use the tool

2 I have not been trained to use the tool effectively

3 I don't know when to use GenAI

4 The tool doesn't match my needs or doesn't integrate well with my workflow

5 I don't trust the tool enough
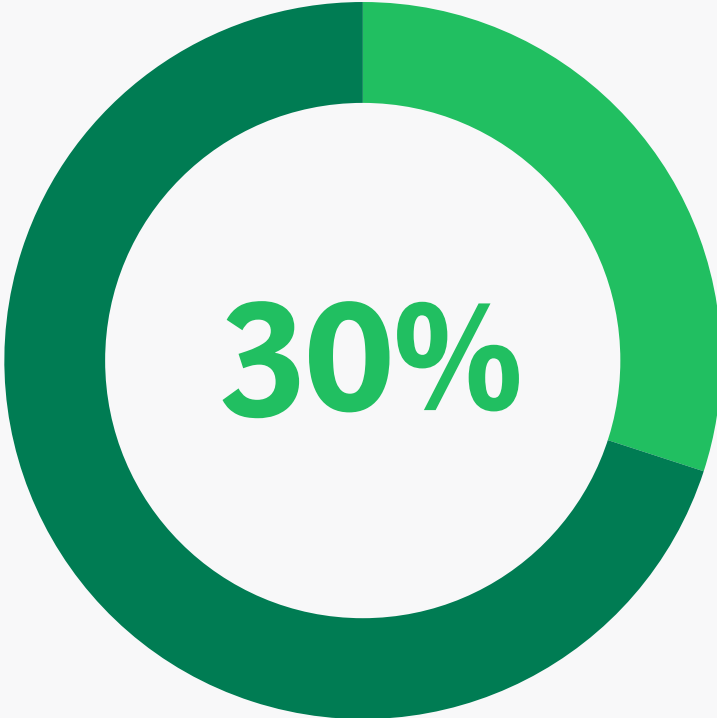
Frontline employees lag leaders in training opportunities

Share of workers who have already been trained in how AI will change their job

Leaders[1]

50%

...up from 44% in 2023

Managers[2]

30%

...up from 20% in 2023

Frontline employees[3]

28%
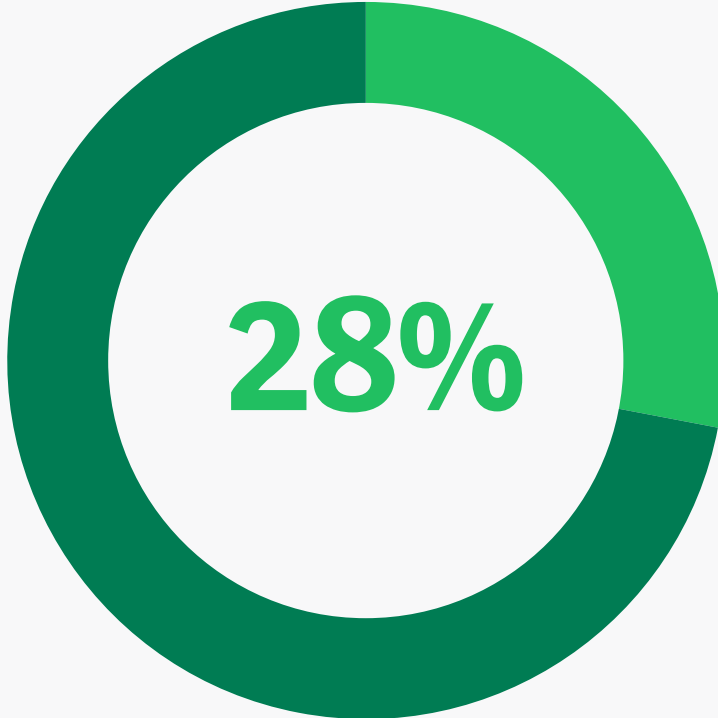
...up from 14% in 2023

Sources: AI at Work (2024); BCG analysis.
[1]n = 4,404. [2]n = 4,368. [3]n = 4,330.

The Global South leads the Global North in training managers and frontline employees

Share of workers who have already been trained across the Global North and the Global South

Leaders[1]

Managers[2]

Frontline employees[3]

Global North   Global South

Five strategic imperatives
for leaders

1 Establish a transformation-first mindset
· Move beyond testing and deploying GenAI, and refocus on big value drivers
· Commit to end-to-end transformation, change management, and the involvement of your people

2 Manage all of your transformations
· As you launch your GenAI transformation, carefully consider any initiatives you're running in parallel to avoiding overwhelming your teams
· Define KPIs to measure progress and key outcomes to ensure that you are achieving business goals and not creating new bottlenecks

3 Build training muscle at scale
· Assess skill gaps to understand the key personas across your organization, and reskill your people accordingly
· Prioritize continuous training, given how quickly GenAI is evolving; also, carve out protected time for your people to learn and adapt to the technology

4 Emphasize how GenAI can increase value creation and employee joy
· Have a GenAI vision centered on value creation, not just productivity, to help boost adoption
· Communicate where GenAI can remove the toil from work and increase joy at work

5 Anticipate the evolution of roles, skills, operating model, data, and governance
· Plan for the need to redesign roles and redeploy talent as GenAI transforms work
· Partner closely with your people managers and HR to create a new operating model built around human and machine intelligence

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