BCG X

AI at Work: What People Are Saying

JUNE 2023

Executive summary

We surveyed nearly 13,000 people—from executive suite leaders to middle managers and frontline employees—in 18 countries to understand their thoughts, emotions, and fears about AI.

Respondents today are optimistic about how AI—and generative AI, in particular—will affect their work, even more so than five years ago, feeling that it will save them time and promote innovation in their roles.

But that level of excitement varies considerably by seniority and by country. Within organizations, those at the top are far more positive about the technology, while frontline employees find it significantly more worrisome.

There are also some deep-seated concerns, including that companies are not taking adequate measures to ensure responsible use of AI and that more upskilling is needed to prepare for expected changes to work. Plus, regulations are not yet in place but are seen as necessary and important.

What can be done to address these gaps? One option is to encourage employees to use generative AI responsibly. Comfort level plays an important role, as using generative AI tools more regularly boosts positive sentiments about AI at work throughout the organization.

What is the impact of AI—and generative AI—on work?

52%

of all respondents rank optimism as one of their top two sentiments—a 17-point jump from 2018

10pp

decline in concern compared to five years ago—the steepest drop recorded in the survey

20pp

amount by which frontline employees are less optimistic than leaders; they are also nearly twice as concerned

31pp

size of the gap separating the most optimistic and least optimistic countries

26%

say they already use generative AI tools at least several times a week

86%

of respondents believe that they will need upskilling, but just 14% of frontline employees say that they've received training

29%

of frontline employees believe that their companies have implemented adequate measures to ensure responsible use of AI, while 68% of leaders feel the same

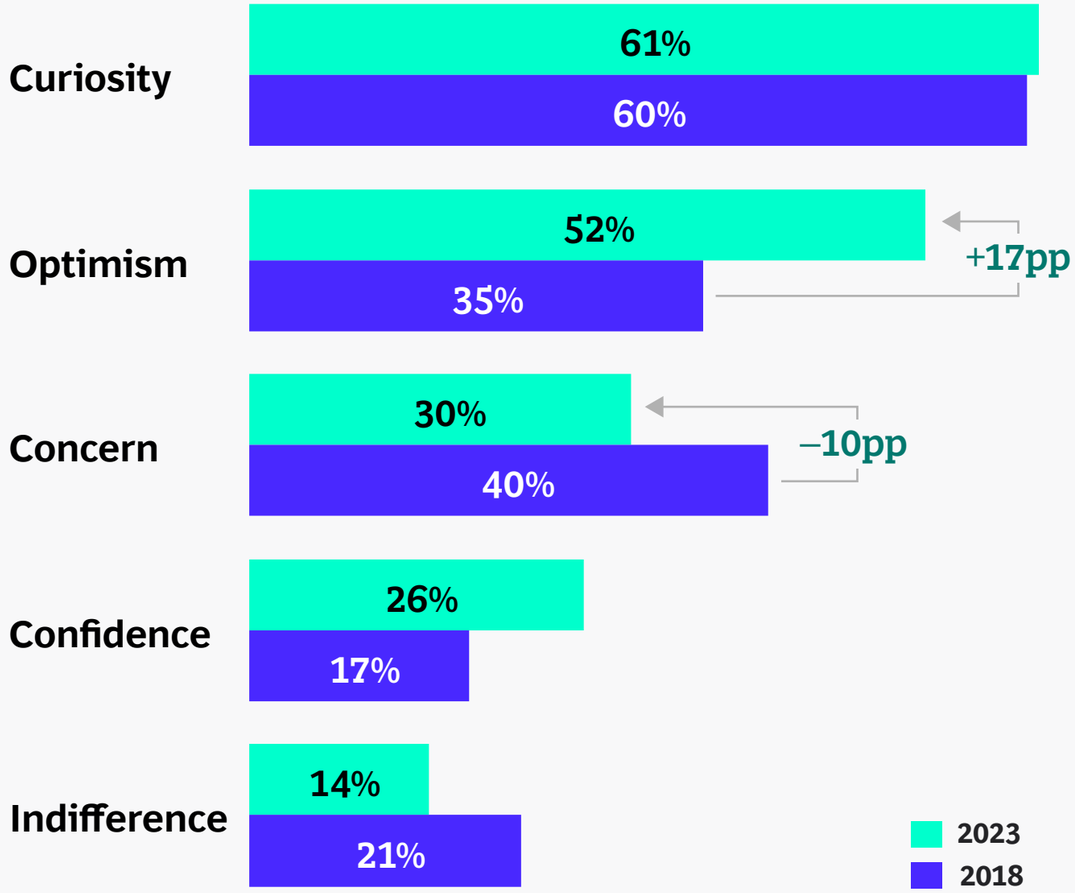
79%

of all respondents consider AI-specific regulation necessary

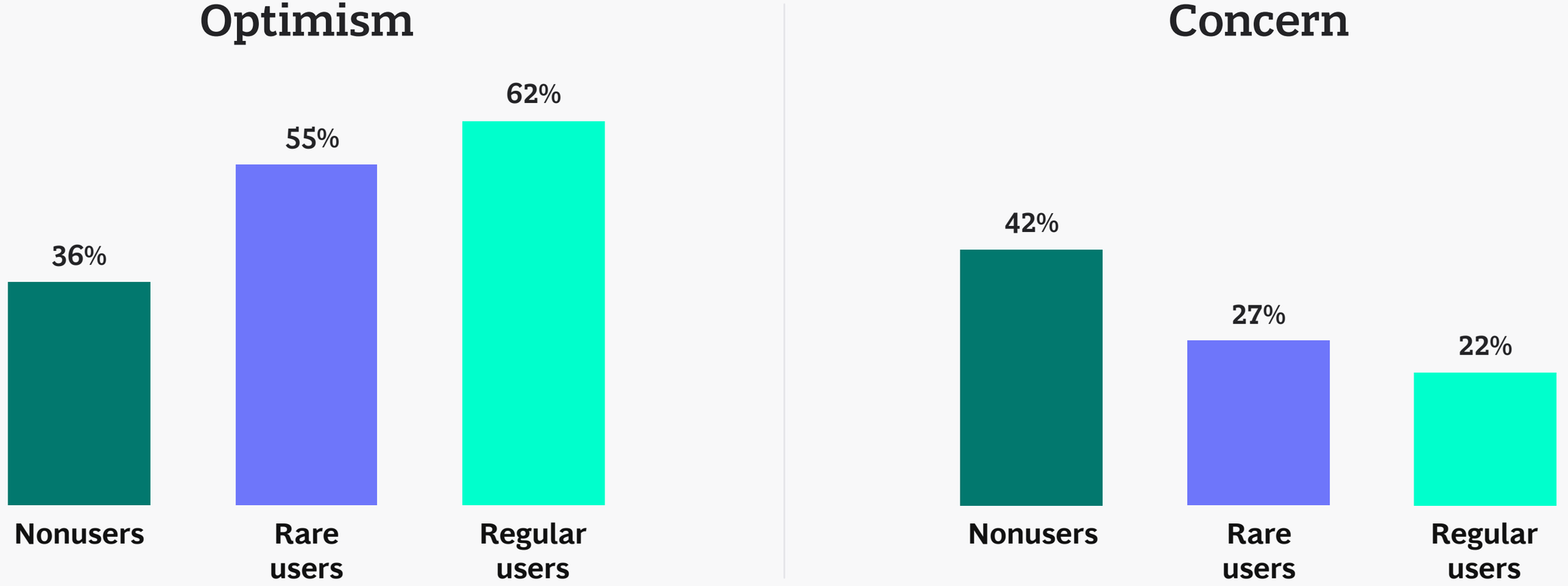
Optimism is rising, and concern is falling

Sources: AI Have No Fear survey (2018), n = 7,077 in 7 countries (Canada, China, France, Germany, Spain, UK, US); AI at Work survey (2023), n = 12,898 in 18 countries (Australia, Brazil, Canada, France, Germany, India, Italy, Japan, Kuwait, Netherlands, New Zealand, Oman, Qatar, Saudi Arabia, Spain, UAE, UK, US).
Note: Proportion of respondents who ranked the sentiment in their top two. pp = percentage points.

The top five sentiments about AI's impact on work in 2023 and 2018

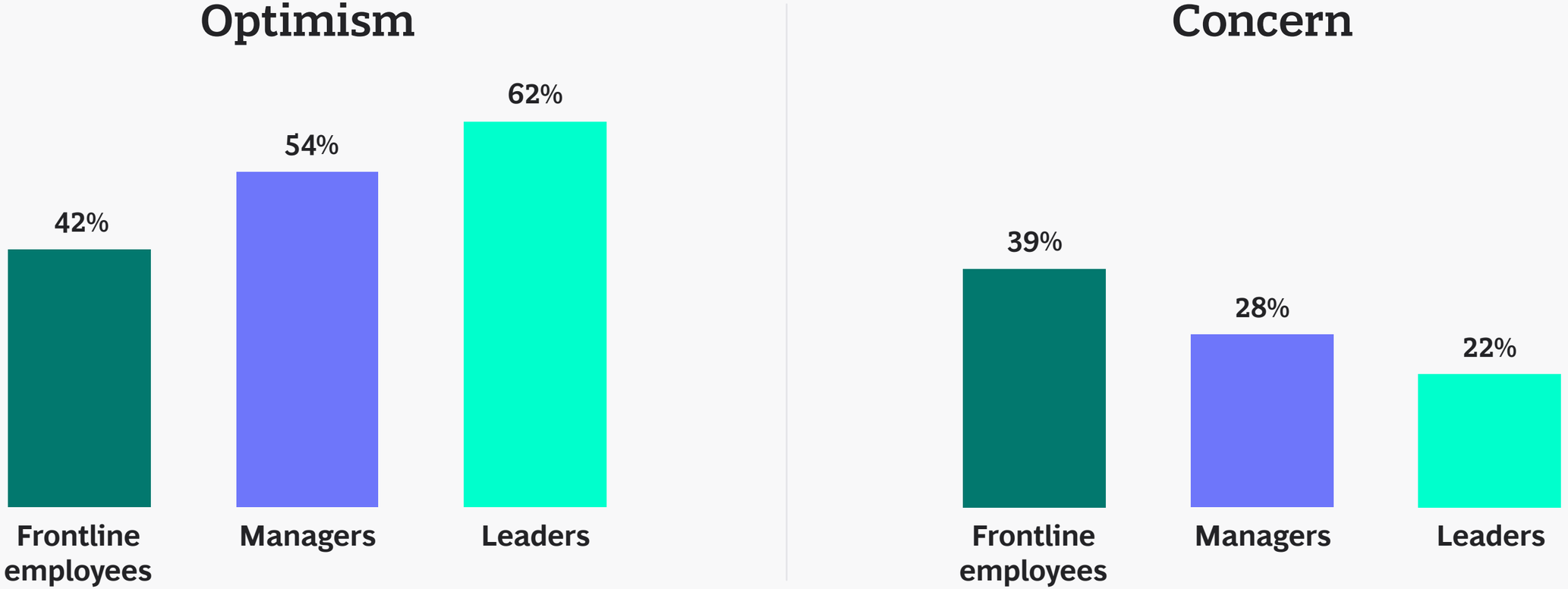


Optimism grows with familiarity, and respondents who use generative AI regularly are far more bullish than those who have never tried it



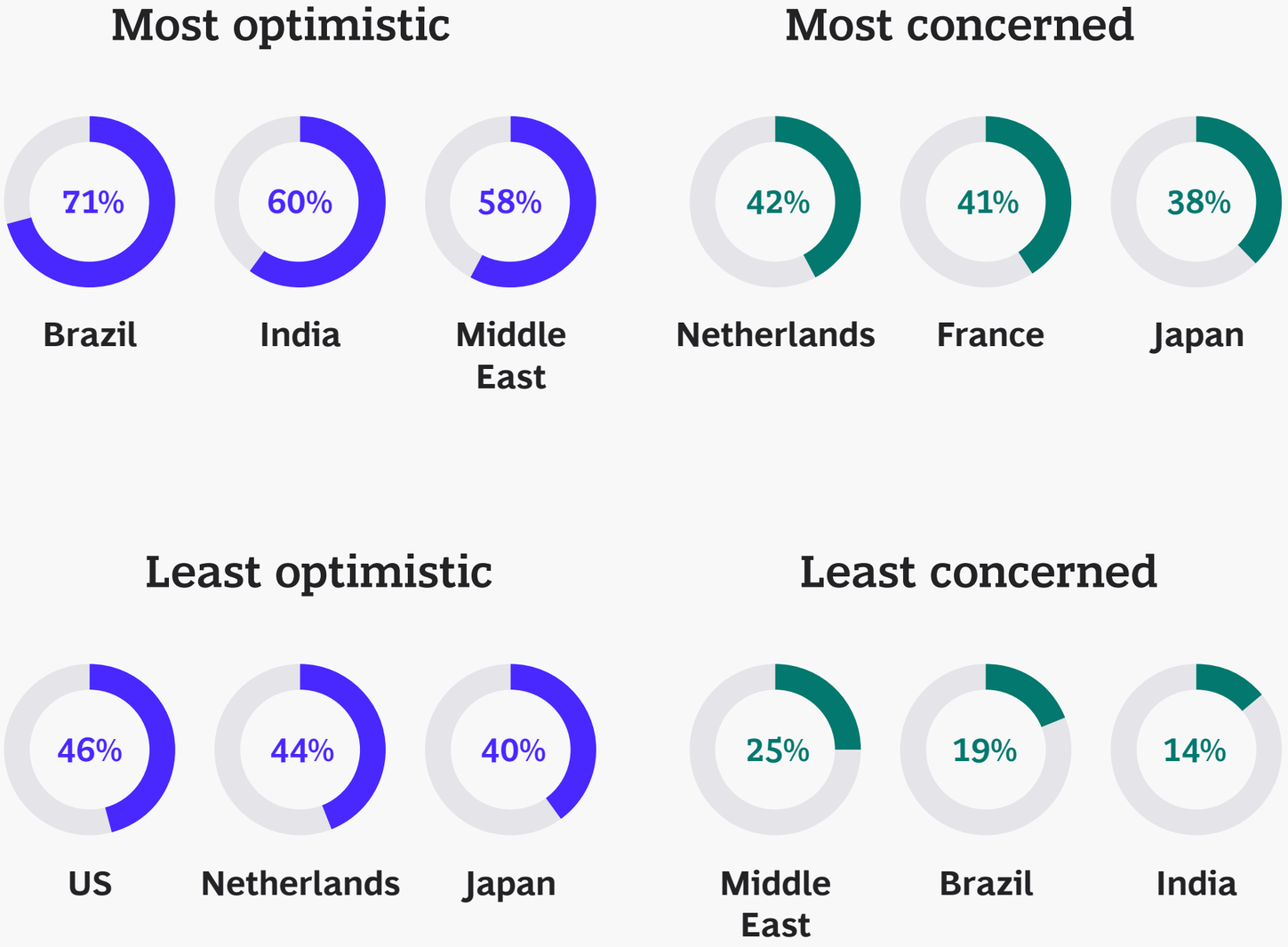
Source: AI at Work survey (2023), n = 12,898 in 18 countries.
Note: Proportion of respondents selecting the feeling in their top two. “Regular users” are respondents who use generative AI at least weekly; “rare users” are respondents who use generative AI at least monthly.

The sentiments of leaders and frontline employees differ sharply



Source: AI at Work survey (2023), n = 12,898 in 18 countries.
Note: Proportion of respondents selecting the feeling in their top two.

Global sentiments vary considerably, as demonstrated by the ranges of optimism and concern about AI in the workplace



Source: AI at Work survey (2023), n = 12,898 in 18 countries.
Note: Proportion of respondents selecting the feeling in their top two.

46%

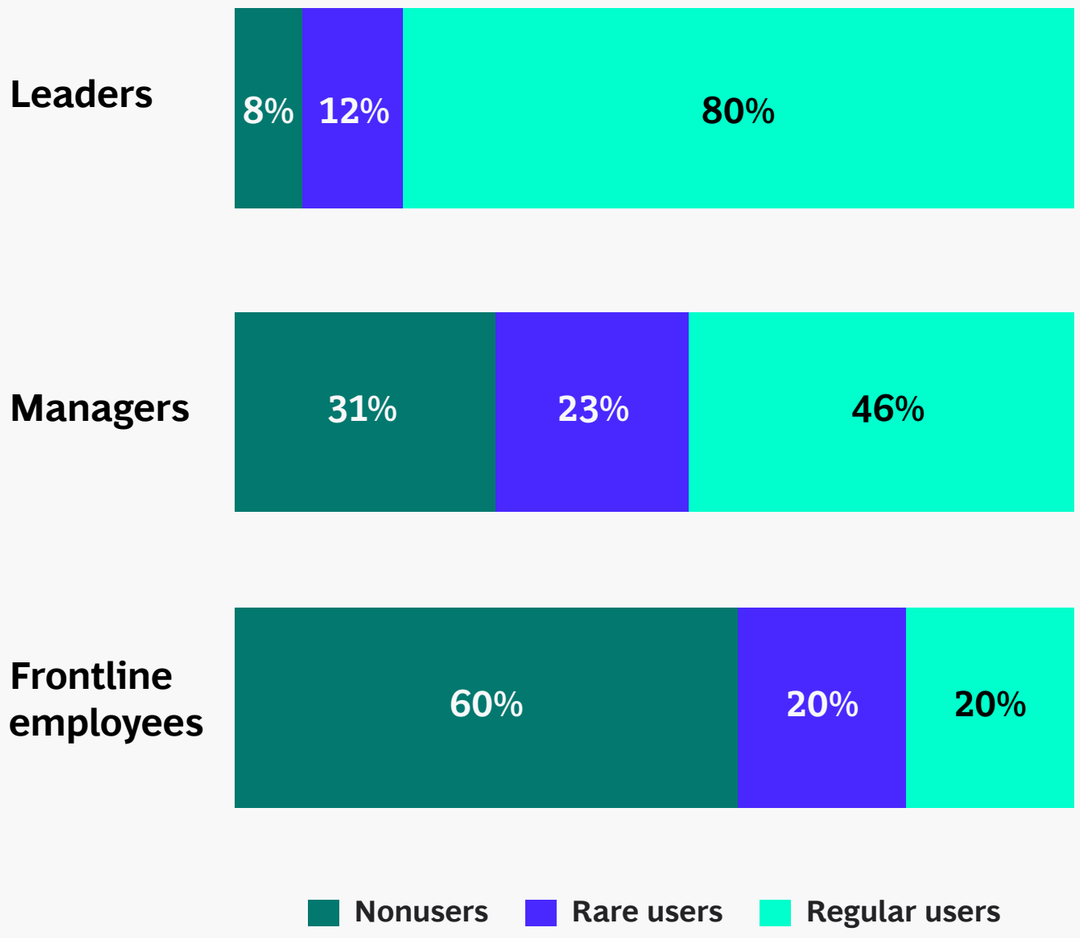
of respondents say they have experimented with generative AI at least once[1]

26%

already use it several times a week[1]

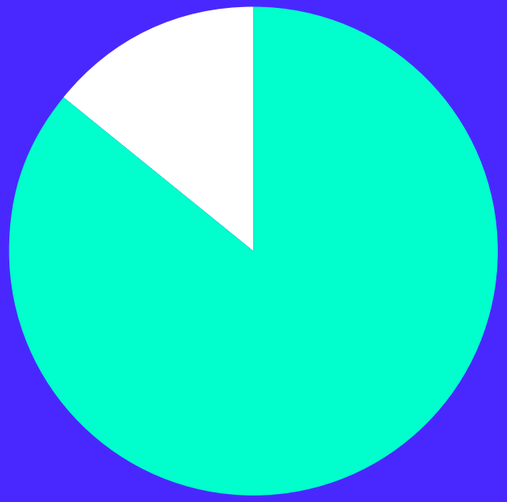
Source: AI at Work survey (2023), n = 12,898 in 18 countries.
Note: "Regular users" are respondents who use generative AI at least weekly; "rare users" are respondents who use generative AI at least monthly. [1]These figures are based on US Bureau of Labor Statistics data, weighted to reflect an 85%/10%/5% split of frontline employees, managers, and leaders, respectively. For this highlighted percentage, n = 4,302.

An overwhelming majority of leaders say that they use generative AI tools regularly



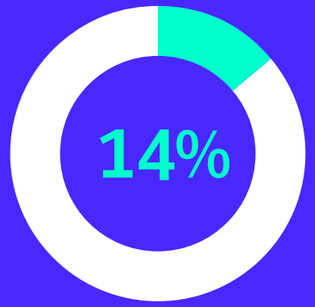
36%

of respondents think that their job is likely to be eliminated by AI

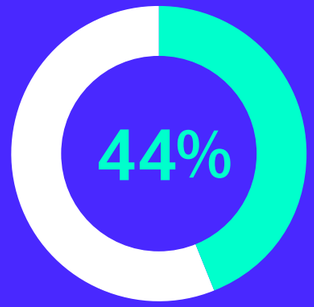


86%

believe that they will need upskilling to address how AI will change their jobs



of frontline employees say that they have already gone through upskilling



44% of leaders say that they have done so

Source: AI at Work survey (2023), n = 12,898 in 18 countries.

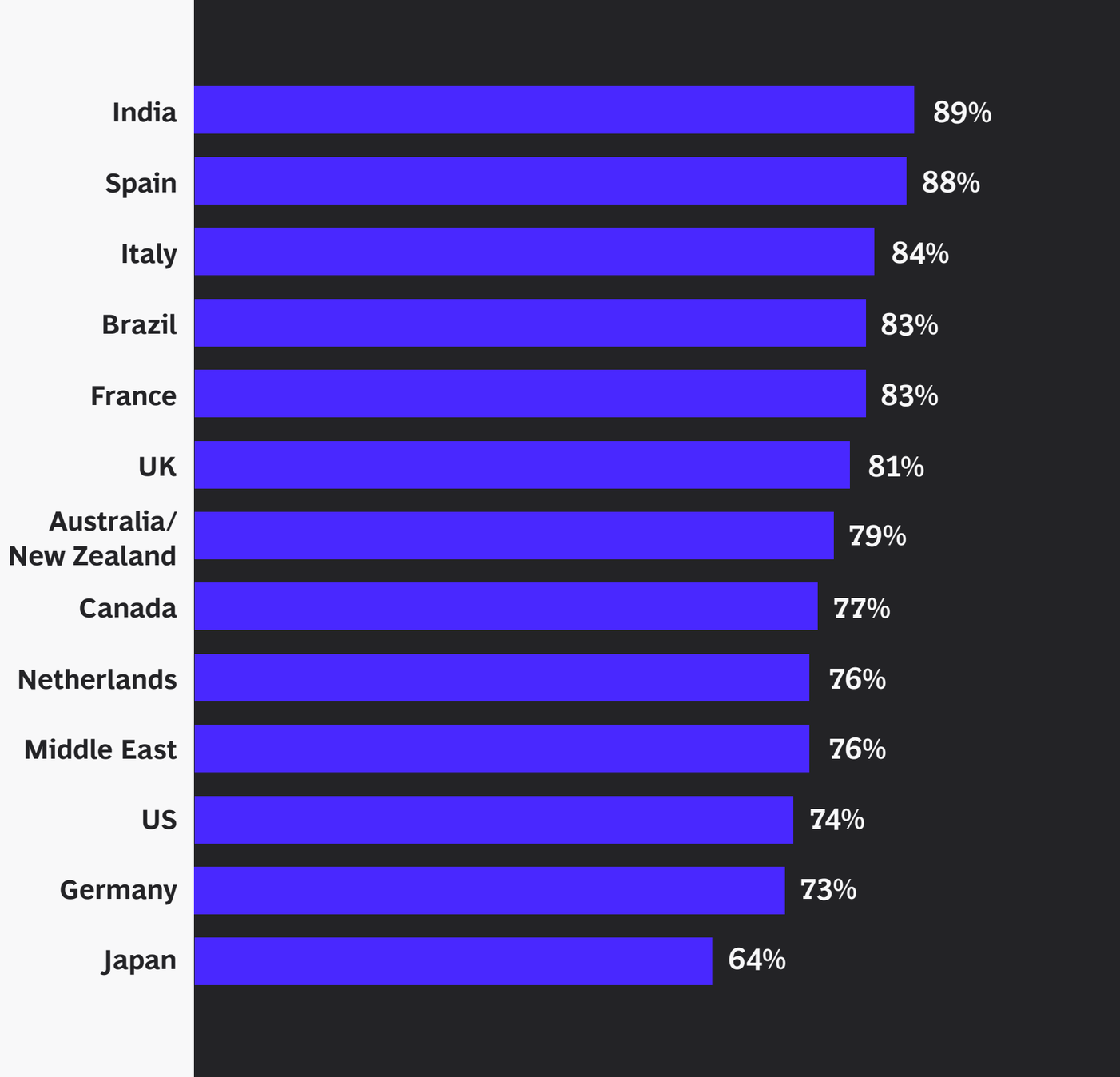
Are organizations using AI responsibly? It depends on who you ask

Source: AI at Work survey (2023), n = 12,898 in 18 countries.

79%

of all respondents believe that AI-specific regulations are necessary

A majority holds across all countries surveyed, but to varying degrees...



Source: AI at Work survey (2023), n = 12,898 in 18 countries.

The bottom line for leaders: Three key recommendations

1.

Ensure that there are spaces for responsible experimentation

Comfort levels with technology play a key role

The more regularly employees use AI and generative AI, the more clearly they recognize its benefits—as well as its limitations and risks

2.

Invest in regular upskilling

Training is essential and must be done continuously

Given how swiftly technology evolves, organizations cannot treat upskilling as a one-off effort; they must invest in training to help employees adapt to the ways AI will change their jobs

3.

Prioritize building a responsible AI program

The responsible use of AI is paramount

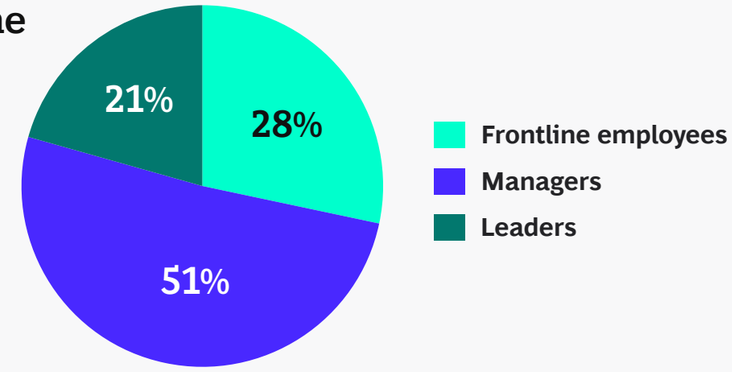
Employees want reassurance that their organizations are approaching AI and generative AI ethically, and leaders want to be in a position to help frame emerging AI regulations

Source: BCG analysis.

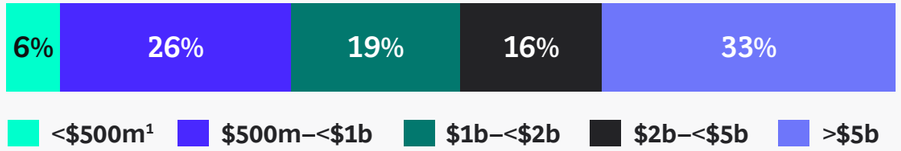
Survey parameters

12,898
respondents

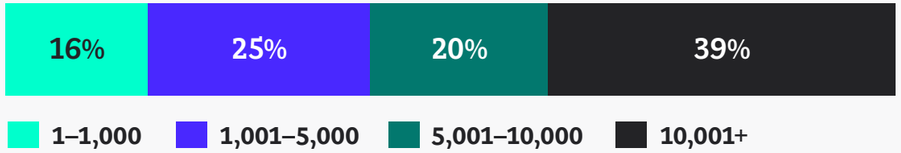
Role in the company



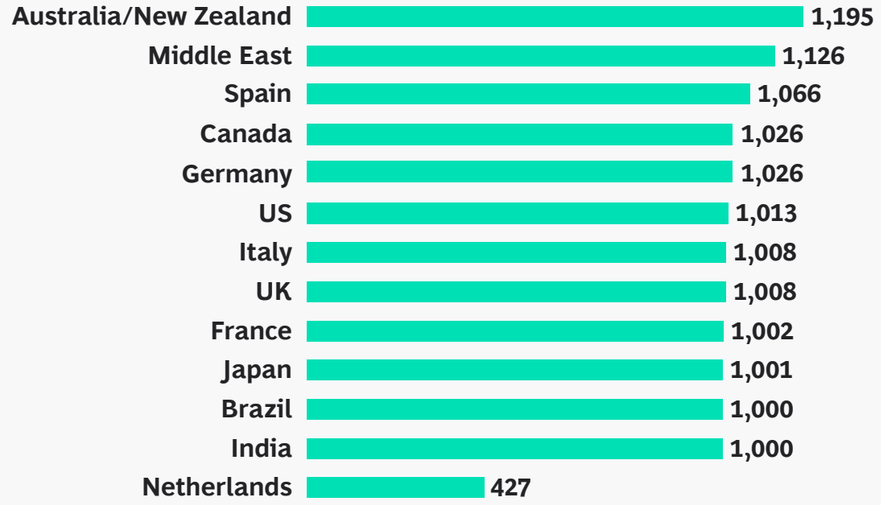
Company revenues



Number of employees at the company



Number of respondents by country/region



Source: AI at Work survey (2023), n = 12,898 in 18 countries.
[1]Only the Netherlands and countries in the Middle East include data for companies with revenues of less than $500 million.

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