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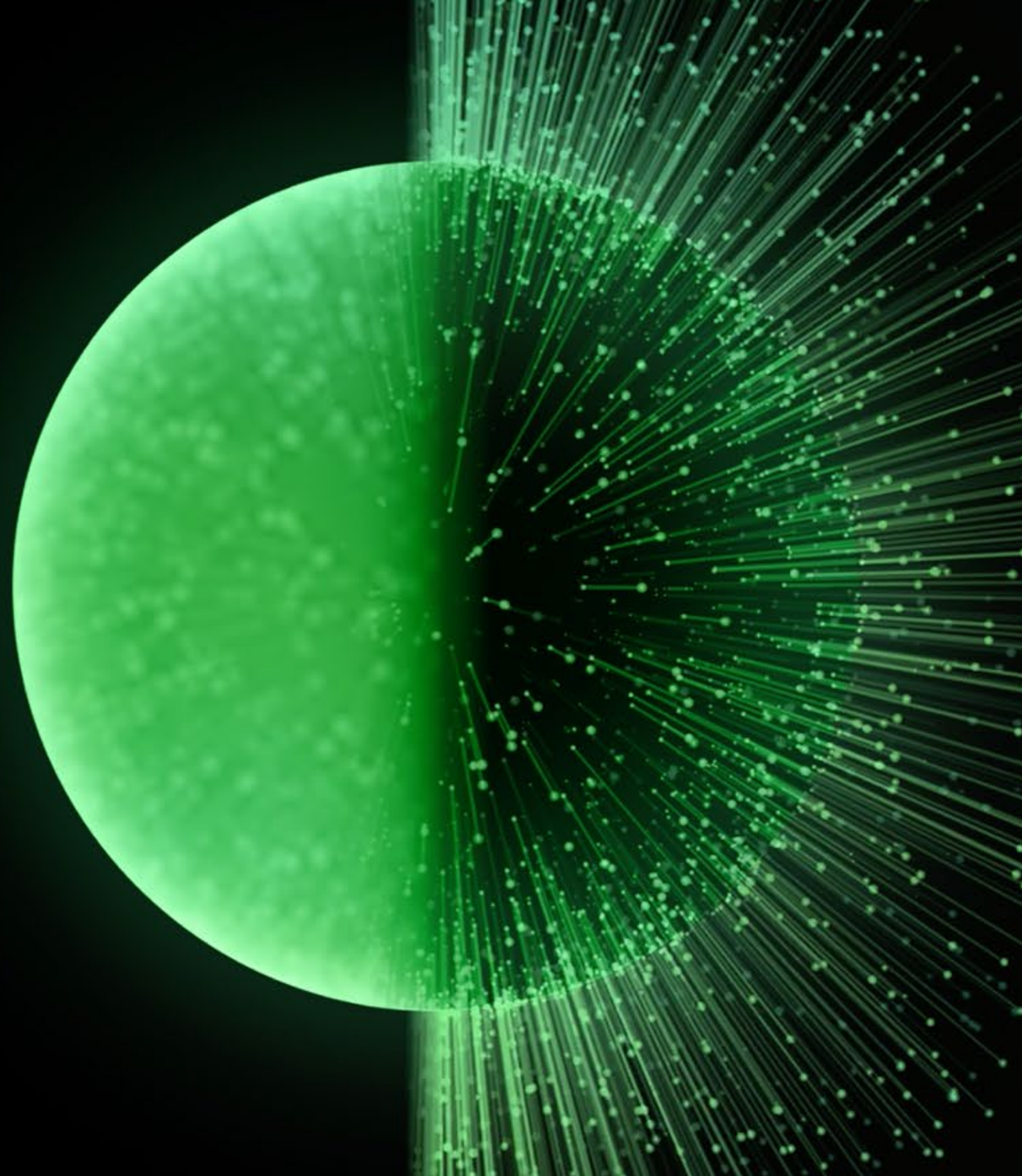
BCG AI AT WORK

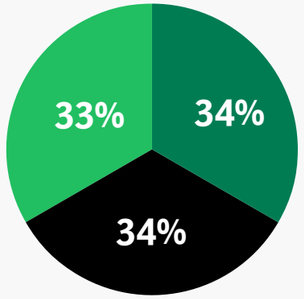
Is Asia Pacific Leading the Way?



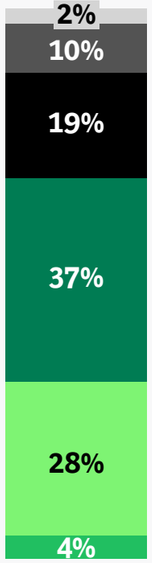
APAC EDITION | OCTOBER 2025

Survey parameters

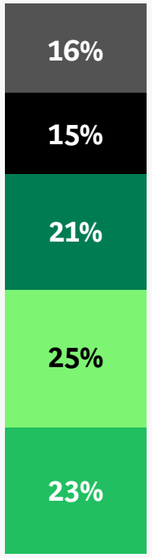
4,559
respondents



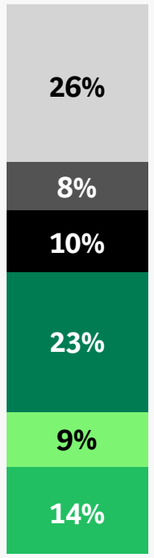
Role
- Frontline employees[1]
- Managers
- Leaders



Age
- 65+
- 55–64
- 45–54
- 35–44
- 25–34
- 18–24

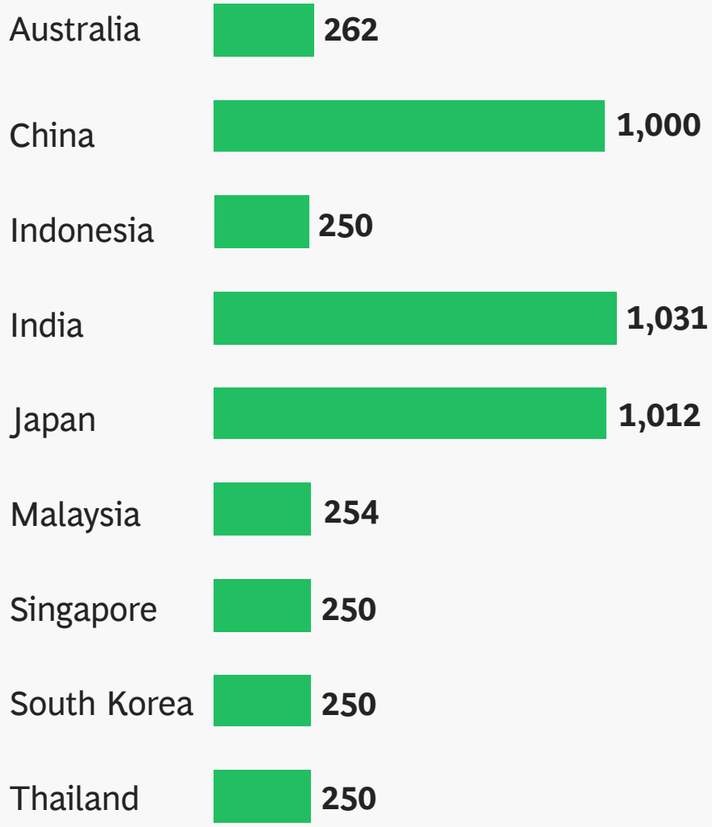


Company revenue
- $5B or more
- $2B–$5B
- $1B–$2B
- $500M–$1B
- $100M–$500M



Industry
- TMT
- Manufacturing
- Health care
- Financial institutions
- Energy
- Consumer/retail

Key markets (# of respondents)



Sources: AI at Work APAC, 2025 (N=2,516); AI at Work Global, 2025: Japan (n=1,012) + India (n=1,031); BCG analysis.
Note: TMT = technology, media, and telecommunications.
[1]Individual white-collar employees with no managerial responsibilities.

Five key takeaways

1

Strong AI adoption in APAC, with optimism about its potential

78% of all respondents are regular AI users.

2

From deployment to value, with end-to-end redesign

More than half of respondents say their company is starting to reshape or invent its processes. These companies support their people—and it pays off.

3

Leadership support, access to the right tools, and redesigned workflows

Companies at the forefront of AI adoption globally invest 70% of their AI budgets in reshaping and inventing, compared to only 57% of APAC companies.

4

High adoption rates—and fear of job loss

More than 50% of respondents have job security concerns, spanning all levels.

5

Early traction and fast adoption of AI agents

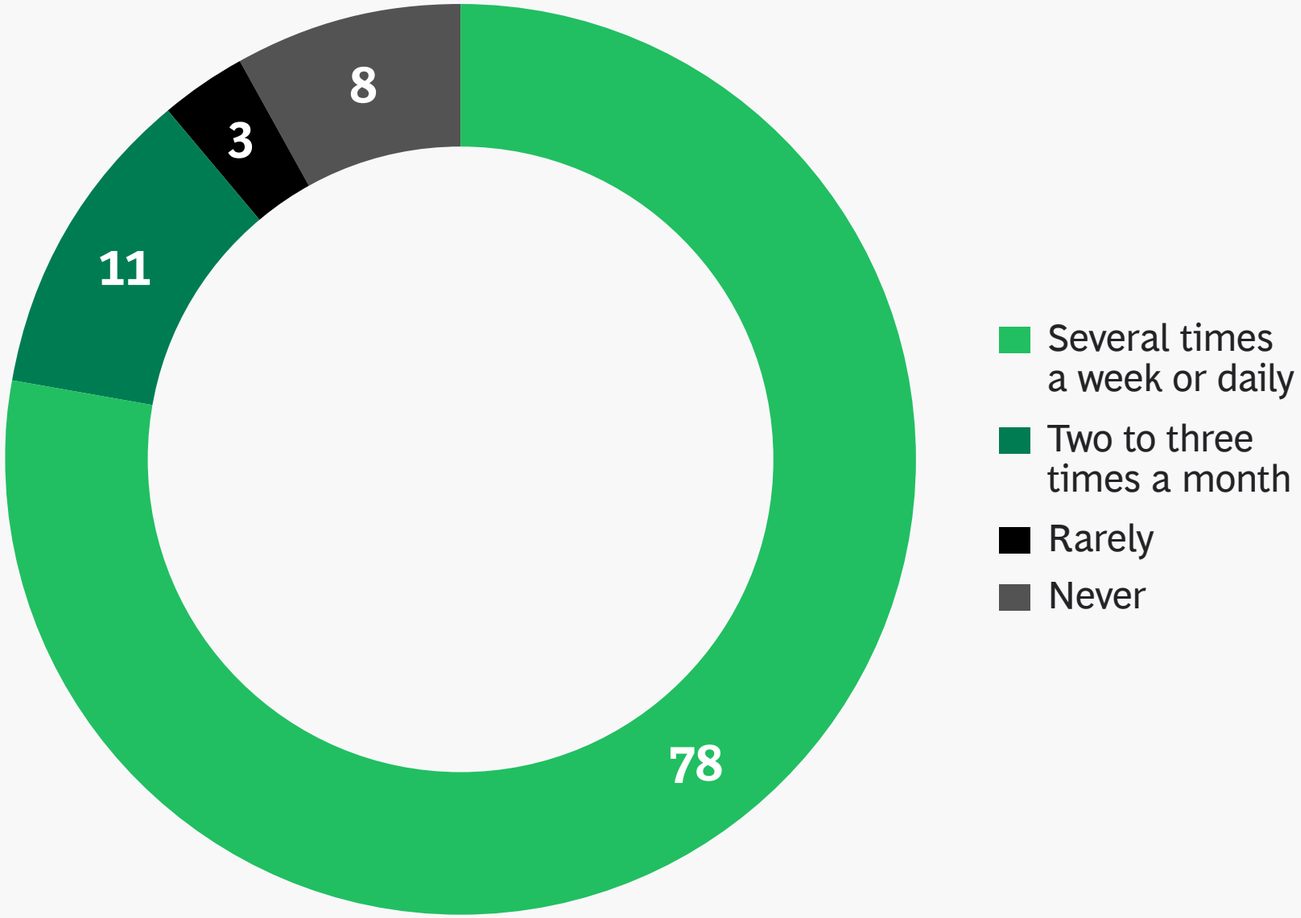
With a 13% adoption rate to date and 64% experimenting with AI agents, early engagement points to strong momentum ahead.

78%

of respondents in APAC are regular AI users, with high usage across employee levels

Sources: AI at Work APAC, July 2025 (N=2,516); AI at Work Global, 2025: Japan (n=1,012) + India (n=1,031); BCG analysis.

Frequency of GenAI usage (% of respondents)



AI adoption in APAC is strong, with uniquely high adoption rates for frontline employees

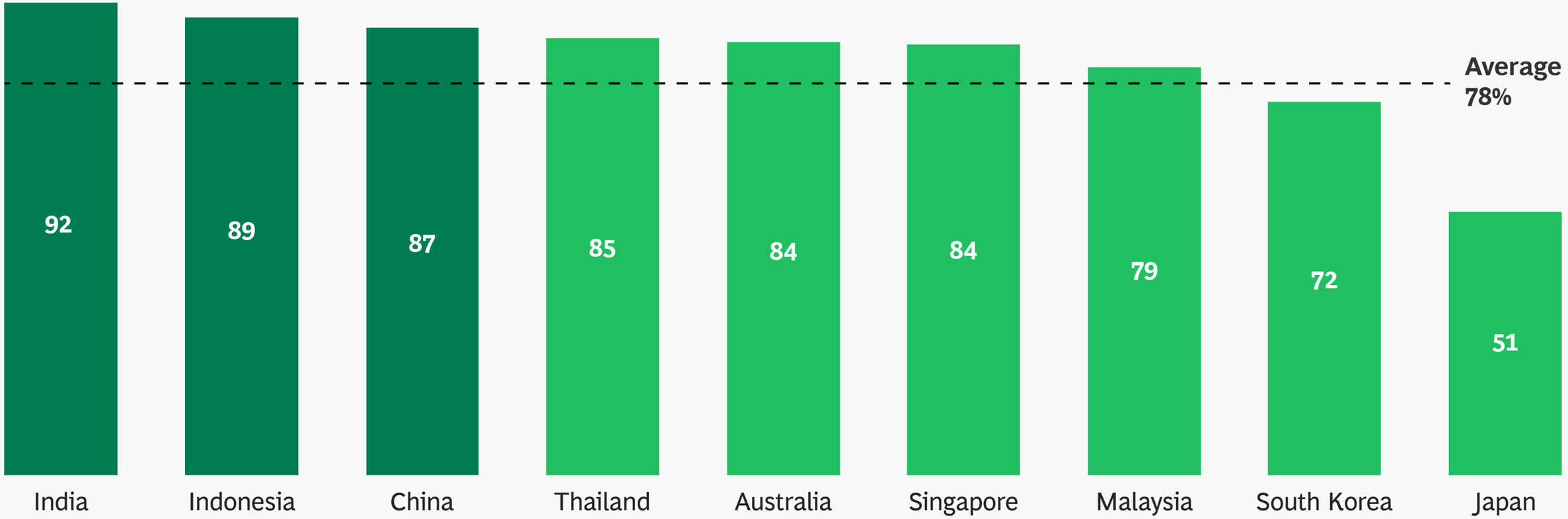
Sources: AI at Work APAC (July 2025), N=2,516; AI at Work Global, 2025: Japan (n=1,012) + India (n=1,031); BCG analysis.
Note: Regular users = people that use AI several times a week or daily; Frontline employees = white collar workers with no managerial responsibility.

Leaders have the highest adoption rates, but frontline employees show significantly higher adoption than the global average

Frequency of GenAI usage (% of respondents)

India, Indonesia, and China lead AI adoption, with over 87% of respondents saying they are regular users

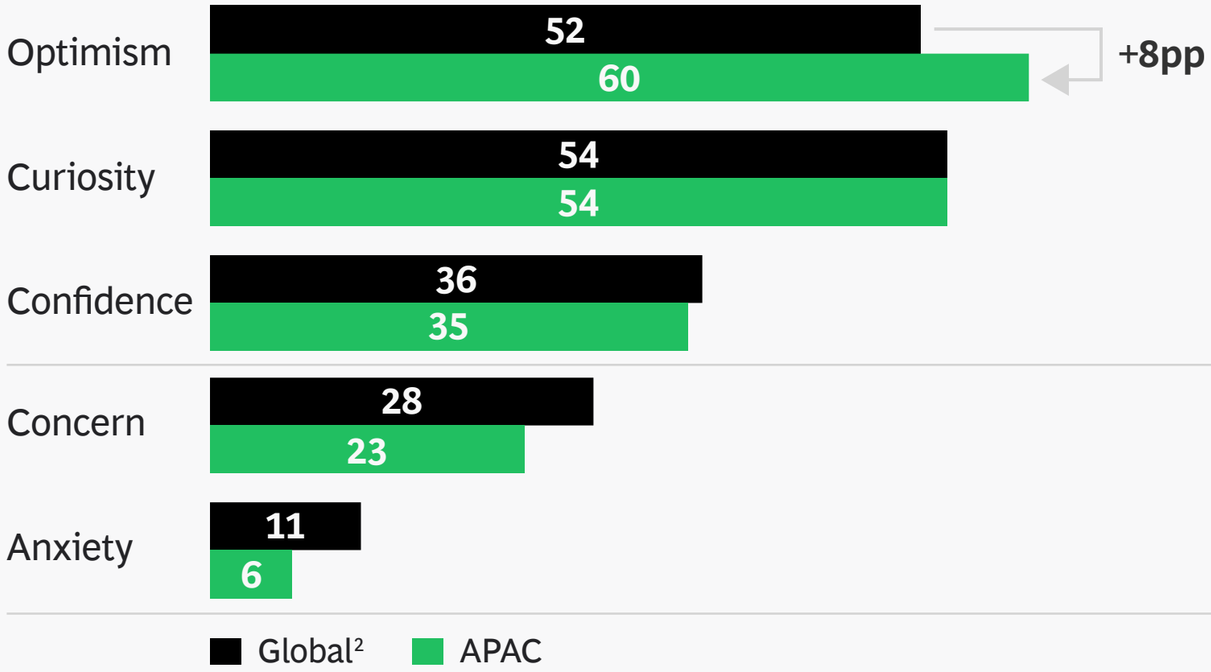
Share of respondents who use AI at least several times a week (%)



Sources: AI at Work APAC, July 2025 (N=2,516); AI at Work Global, 2025: Japan (n=1,012) + India (n=1,031); BCG analysis.
Note: Regular users = people that use AI several times a week or daily.

APAC shows stronger optimism toward AI and its future than global peers, with varying degrees of emotion felt across markets

Main feelings when thinking of the consequences that AI (excluding GenAI) would have on respondents' work over the next two years (% of respondents)[1]



China is the most optimistic, while Japan shows less optimism than the other markets (% of respondents)

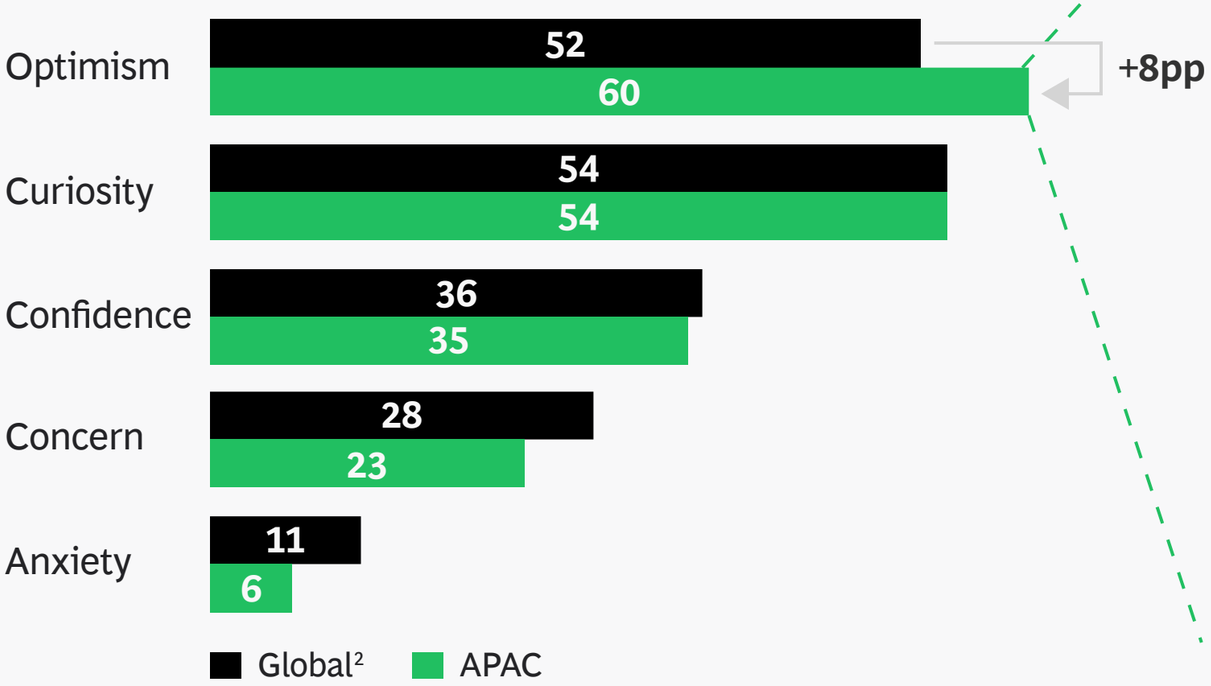
	AUS	CHN	IND	IDN	JPN	MYS	SGP	SK	THA
Optimism	62	70	59	69	46	68	64	57	65
Curiosity	53	56	43	35	74	50	49	59	38
Confidence	31	32	54	32	25	27	28	27	36
Concern	28	16	30	24	23	17	26	29	19
Anxiety	2	2	5	6	15	4	4	5	3

Positive — Negative

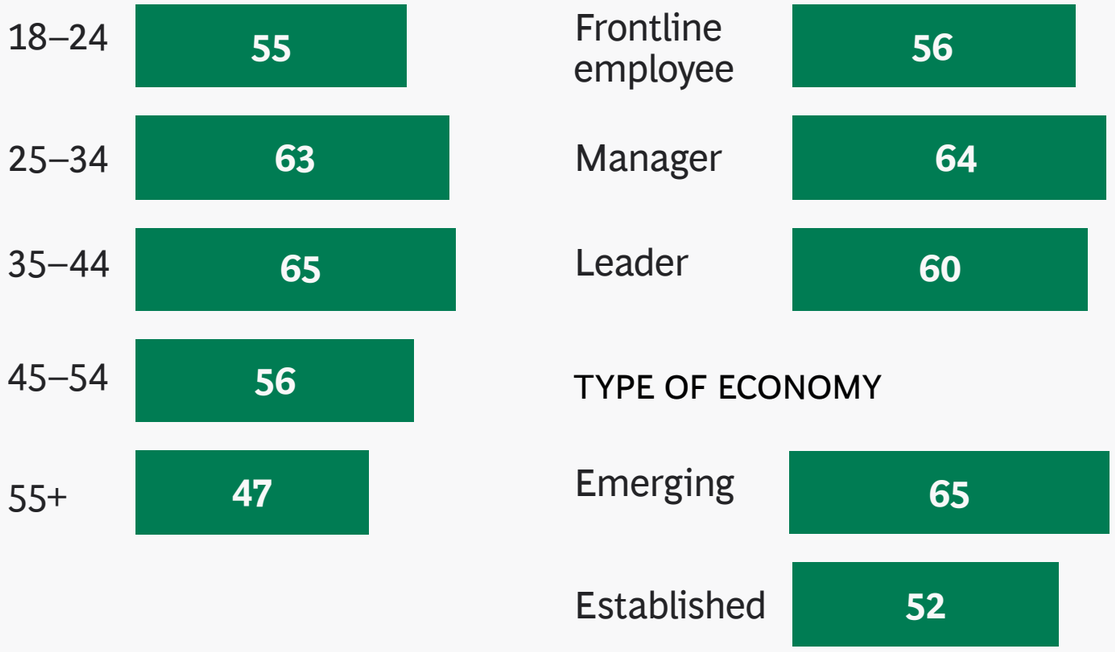
Sources: AI at Work APAC, July 2025 (N=2,516); AI at Work Global, 2025: Japan (n=1,012) + India (n=1,031); BCG analysis.
Note: AUS = Australia, CHN = China, IND = India, IDN = Indonesia, JPN = Japan, MYS = Malaysia, SGP = Singapore, SK = South Korea, THA = Thailand.
[1]Top two responses.
[2]Average from AI at Work Global, 2025.

The greatest optimism is observed among 25- to 44-year-olds, those in senior roles, and those in the emerging economies

Main feelings when thinking of the consequences that AI (excluding GenAI) would have on respondents' work over the next two years (% of respondents)[1]



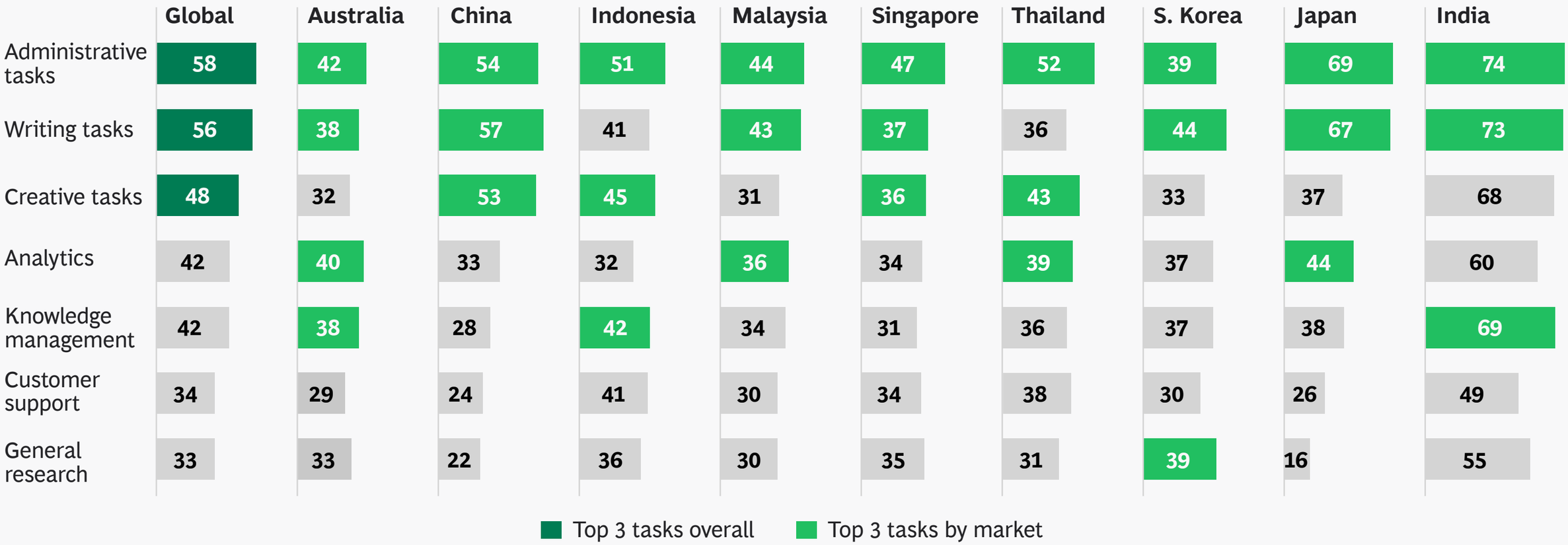
Optimism is one of top two responses (% of respondents)



Sources: AI at Work APAC, July 2025 (N=2,516); AI at Work Global, 2025: Japan (n=1,012) + India (n=1,031); BCG analysis.
Note: Frontline employees = white collar workers with no managerial responsibility. Emerging economies include China, India, Indonesia, Malaysia, and Thailand. Established economies include Australia, Japan, Singapore, and South Korea.
[1]Top two responses.
[2]Average from AI at Work Global, 2025.

GenAI is primarily used for administrative, writing, and creative tasks, with some variation by market

Prior usage of GenAI technologies by respondents (%)



Sources: AI at Work APAC, July 2025 (N=2,516); AI at Work Global, 2025: Japan (n=1,012) + India (n=1,031); BCG analysis.

46%

of respondents say they save more than one hour a day with AI

Sources: AI at Work APAC, July 2025 (N=2,516); AI at Work Global, 2025: Japan (n=1,012) + India (n=1,031); BCG analysis.

Through AI adoption, companies can unlock greater productivity, improve output quality, and accelerate innovation

How respondents use the time they save with AI (%)

52%

of respondents fear losing their jobs—and this fear exists across all job levels

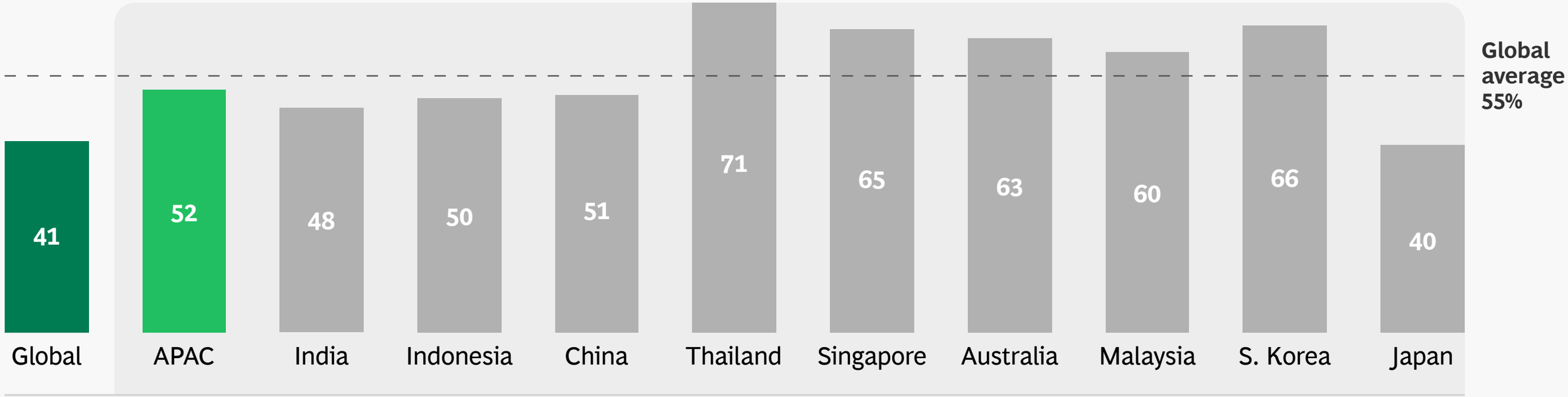
Sources: AI at Work APAC, July 2025 (N=2,516); AI at Work Global, 2025: Japan (n=1,012) + India (n=1,031); BCG analysis.
Note: Frontline employees = white collar workers with no managerial responsibility.
[1]Respondents who answered "certainly" or "probably," excluding respondents who answered "I don't know."

APAC employees report higher fears of job loss than global peers

Respondents who fear they may lose their jobs due to GenAI developments over the next ten years (%)[1]

Despite strong GenAI adoption, concerns over job displacement mean that addressing workforce sentiment is essential

Respondents who think their job will certainly or probably disappear entirely in the next ten years (%)

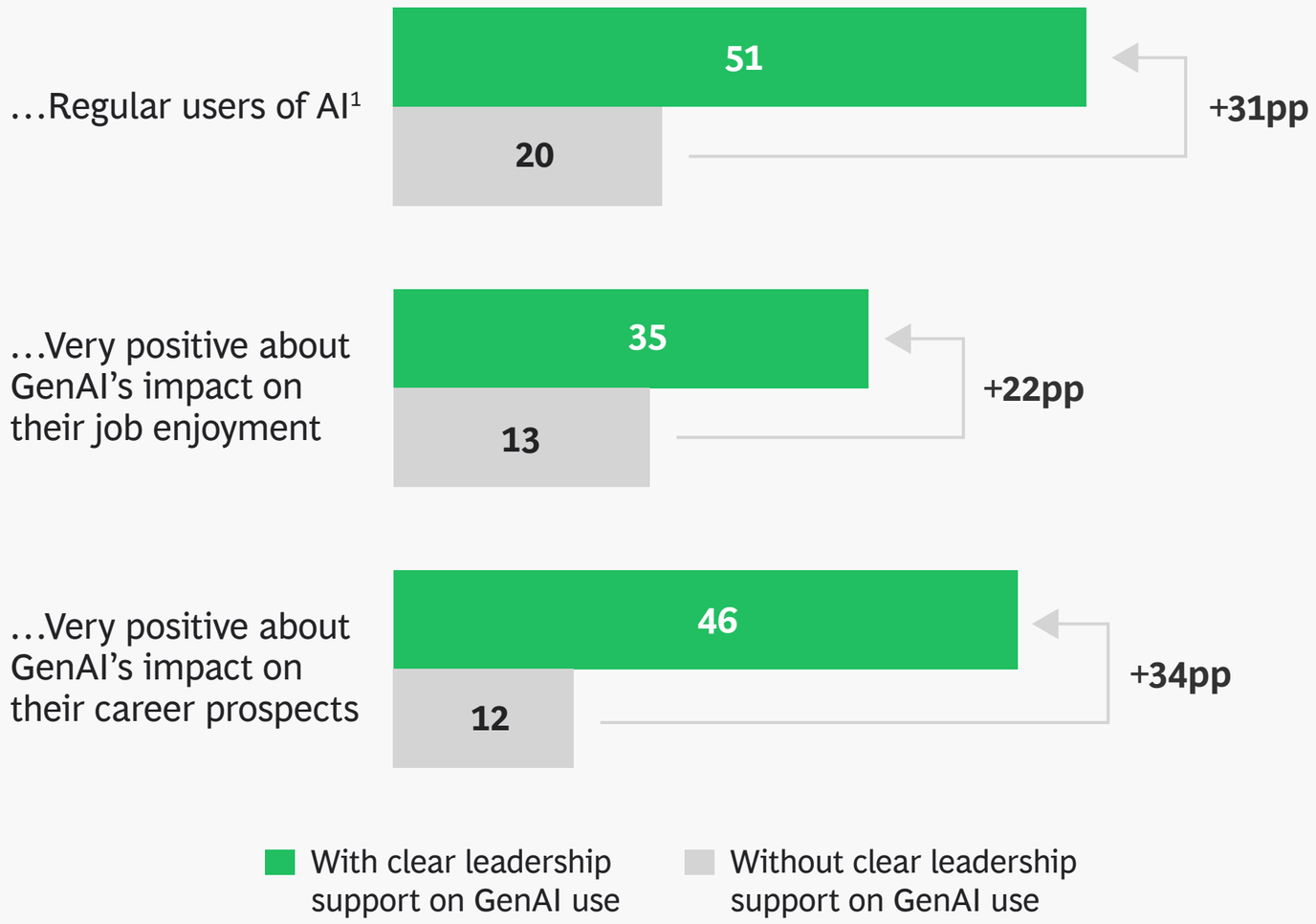


Regular users (%)[1] While adoption is stronger in APAC (+6pp), employees also report higher fear of job loss than global peers (+11pp)

Sources: AI at Work APAC, July 2025 (N=2,516); AI at Work Global, 2025: Japan (n=1,012) + India (n=1,031); BCG analysis.
[1]Regular users = people that use AI several times a week or daily.

Clear leadership support creates stronger adoption, higher optimism, and greater job security among frontline employees

Share of frontline employees who are… (%)



Sources: AI at Work APAC, July 2025 (N=2,516); AI at Work Global, 2025: Japan (n=1,012) + India (n=1,031); BCG analysis.
[1]Regular users of AI are defined only as frontline employees who use AI daily.

But only

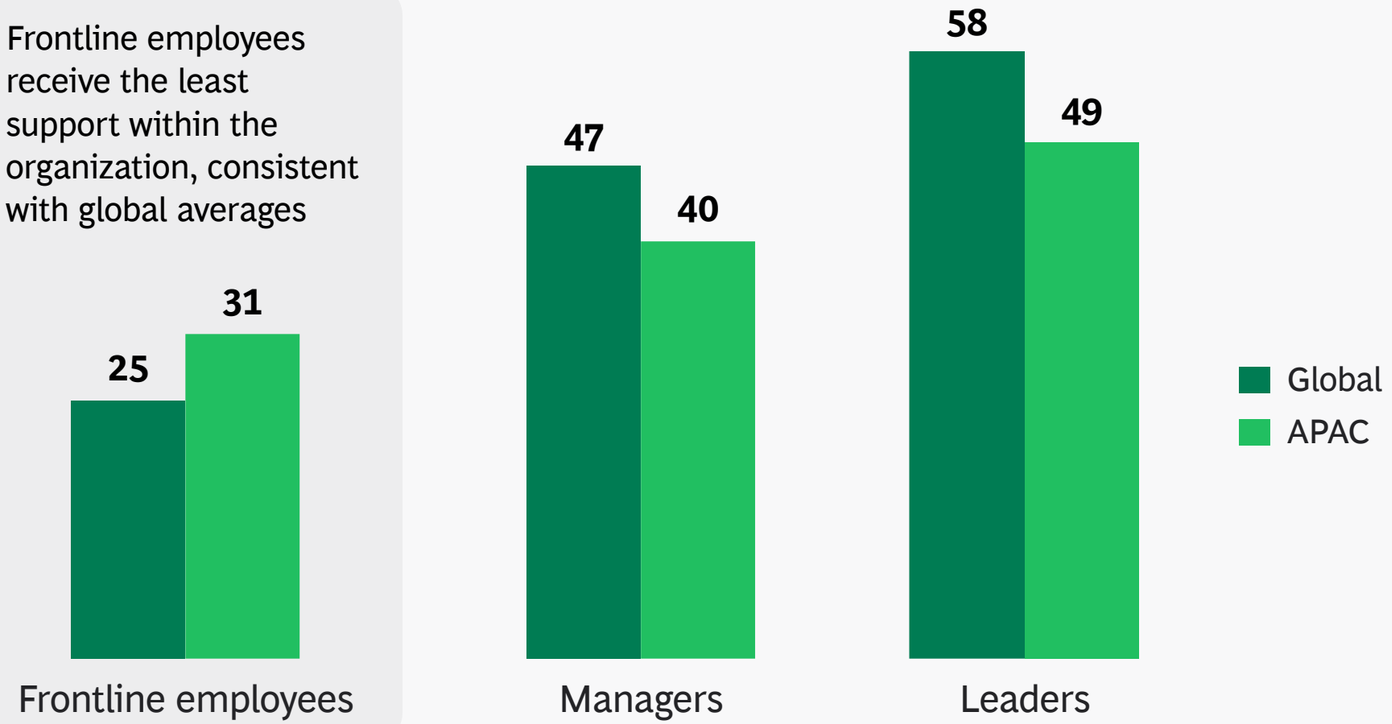
31%

of frontline employees experience clear leadership support

Companies that address this gap can improve adoption and the impact of GenAI across employee levels, especially in frontline roles

Respondents who said “yes” to “strong leadership support has helped me” (%)

Frontline employees receive the least support within the organization, consistent with global averages



Sources: AI at Work APAC (July 2025), N=2,516; AI at Work Global, 2025: Japan (n=1,012) + India (n=1,031); BCG analysis.
Note: Frontline employees = white collar workers with no managerial responsibility.

Still early days for AI agents: While 73% see their potential, only 33% understand them, and most are still experimenting

Employees see potential but do not fully understand AI agents

73%
(77%)[2]

think AI agents[1] will be important in the next three to five years

33%
(33%)[2]

have a proper understanding of what they are[2]

Only 13% see agents integrated into broader workflows, while most are still experimenting

My company's current use of AI agents (% of respondents)

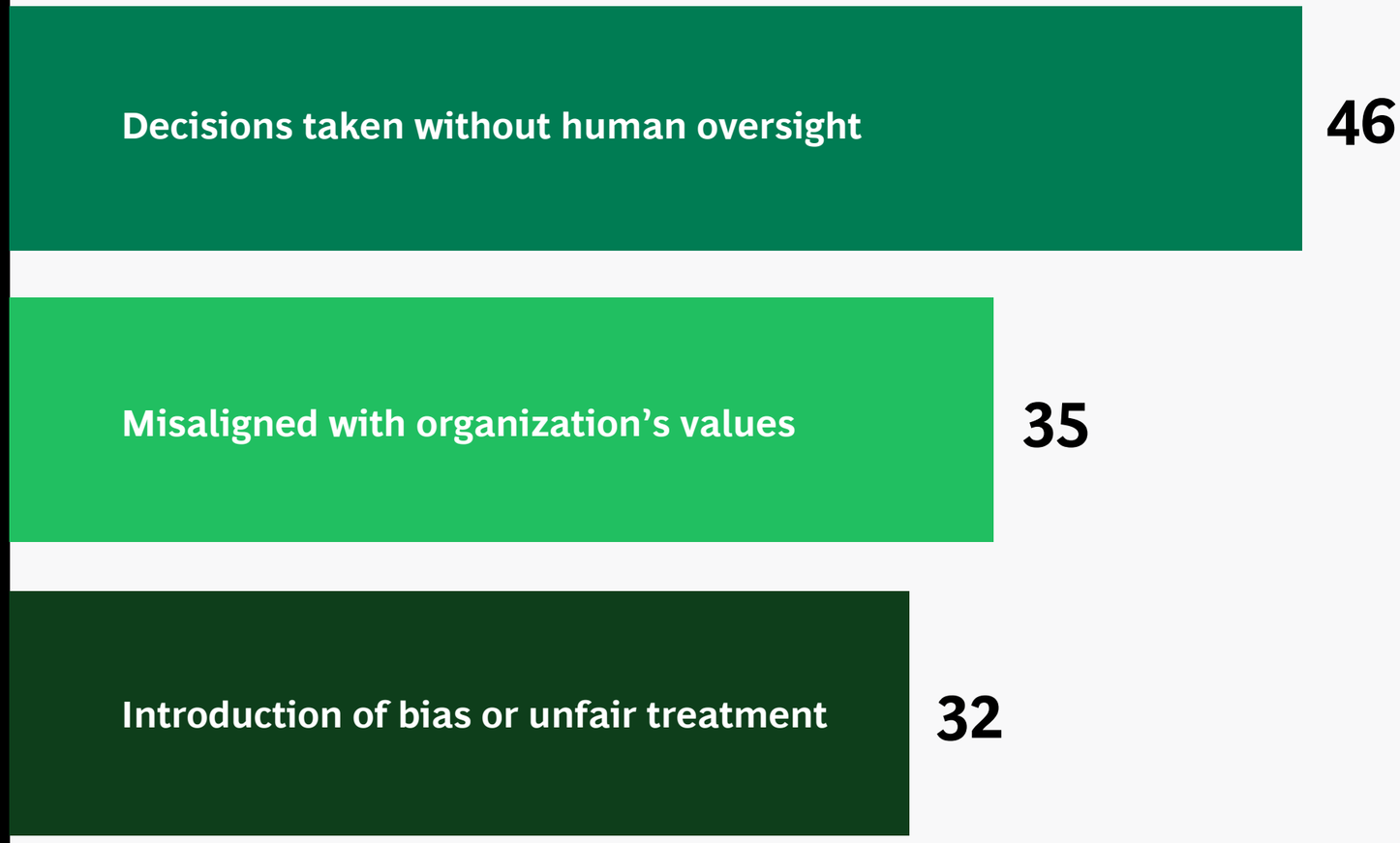
- Integrated into workflows
- Being used experimentally, in pilots, or under human supervision
- Not deployed yet[3]

Sources: AI at Work APAC, July 2025 (N=2,516); AI at Work Global, 2025: Japan (n=1,012) + India (n=1,031); BCG analysis.
[1]AI agents = autonomous tools that take action with minimal human input.
[2]Comparative results from AI at Work Global, June 2025.
[3]Includes unsure responses.

Lack of human oversight, misaligned values, and risk of bias are seen as key barriers to using AI agents

Top three concerns regarding AI agents

(% of respondents)

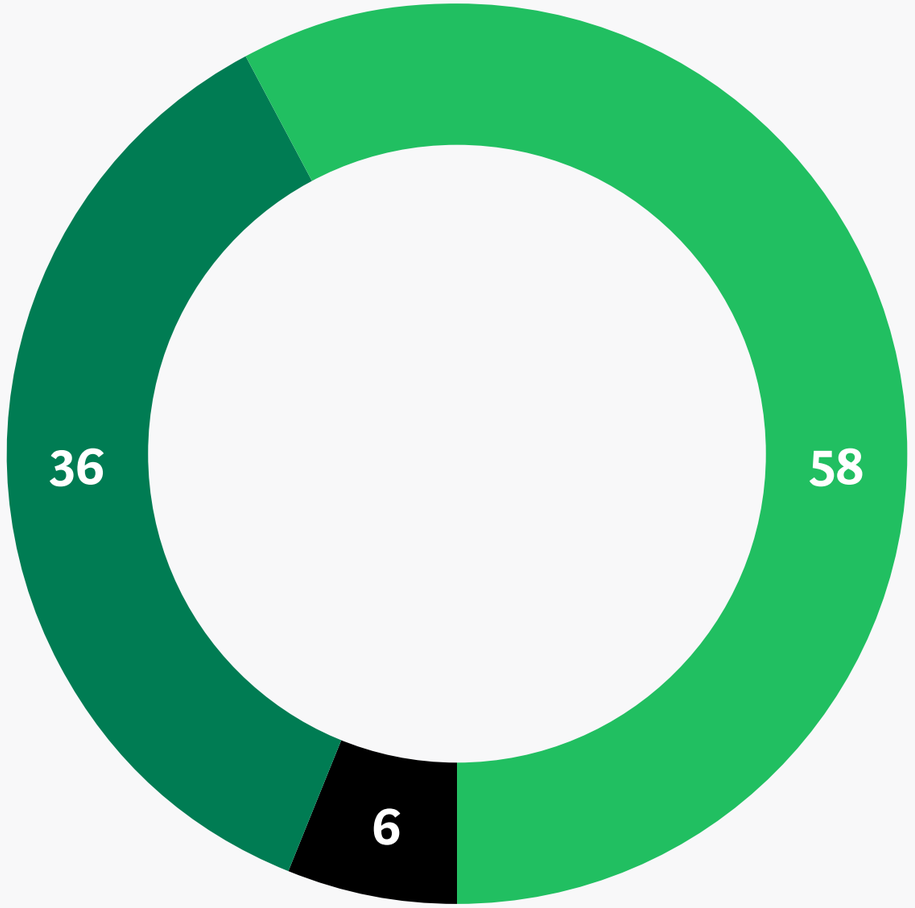


Sources: AI at Work APAC, July 2025 (N=2,516); AI at Work Global, 2025: Japan (n=1,012) + India (n=1,031); BCG analysis.

Companies face rising shadow AI usage—and accompanying security risks

How respondents would react if their organization did not formally provide access to GenAI tools or support their use (%)

- Would use GenAI tools on my own, without formal support from my organization
- Would wait until my organization formally supports and enables use of these tools
- Would not use GenAI tools + Not sure

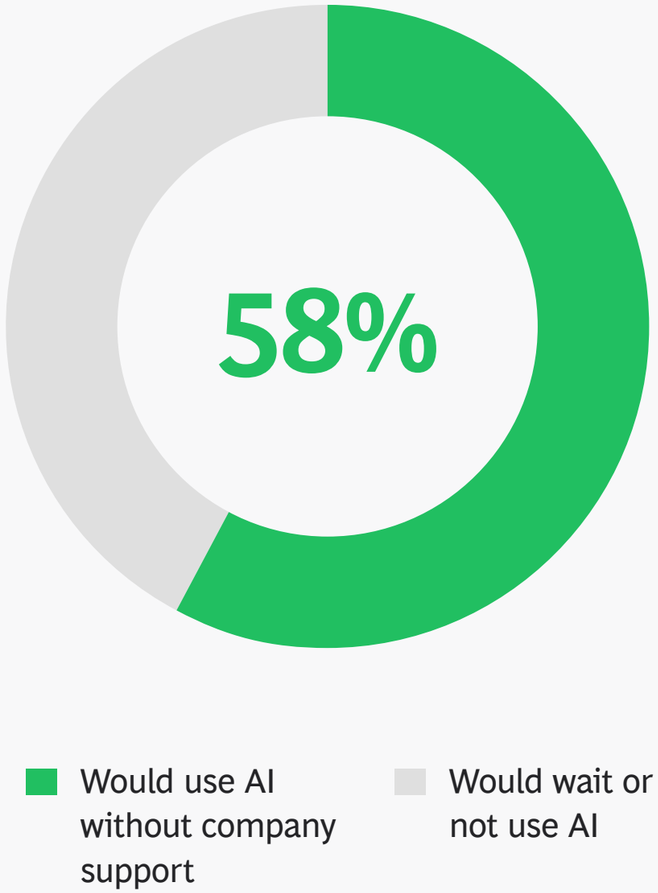


Informal usage may make organizations susceptible to accompanying security and non-compliance risks

Sources: AI at Work APAC, July 2025 (N=2,516); AI at Work Global, 2025: Japan (n=1,012) + India (n=1,031); BCG analysis.

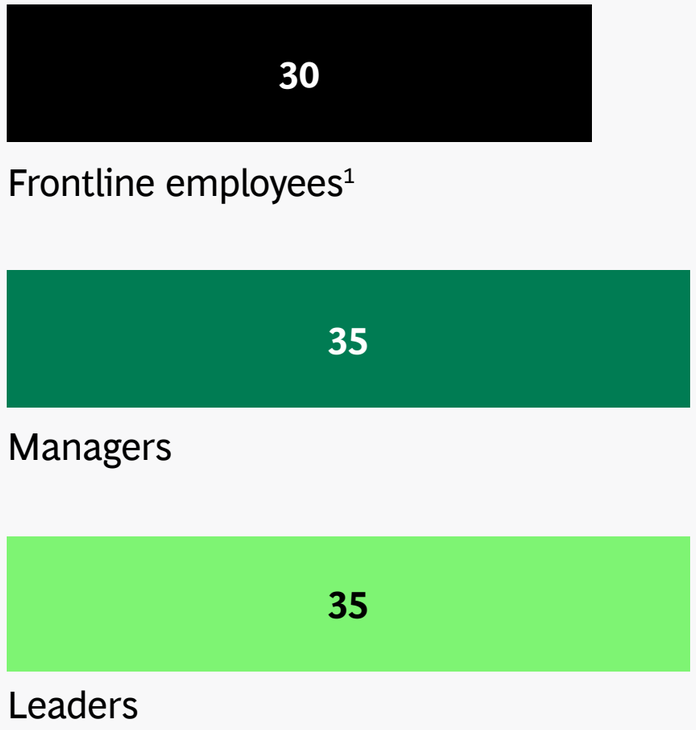
Companies should formalize access and governance to mitigate the risks posed by the 58% currently adopting tools unofficially

Share of respondents who would use AI tools even if not authorized by the company



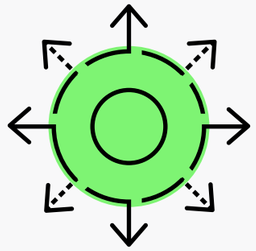
Employees across all roles are most likely to bypass restrictions, which could pose security risks

Those in each role who would use AI without company support (%)

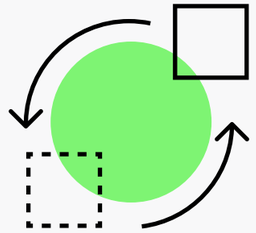


Sources: AI at Work APAC, July 2025 (N=2,516); AI at Work Global, 2025: Japan (n=1,012) + India (n=1,031); BCG analysis.
[1]Frontline employees = white collar workers with no managerial responsibility.

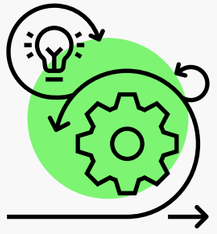
Companies are taking action in three areas



Deploy GenAI in everyday tasks to realize broad enterprise-wide productivity increases of 10%+



Reshape critical functions for radical productivity, speed, and quality improvement of 20% to 50% and more

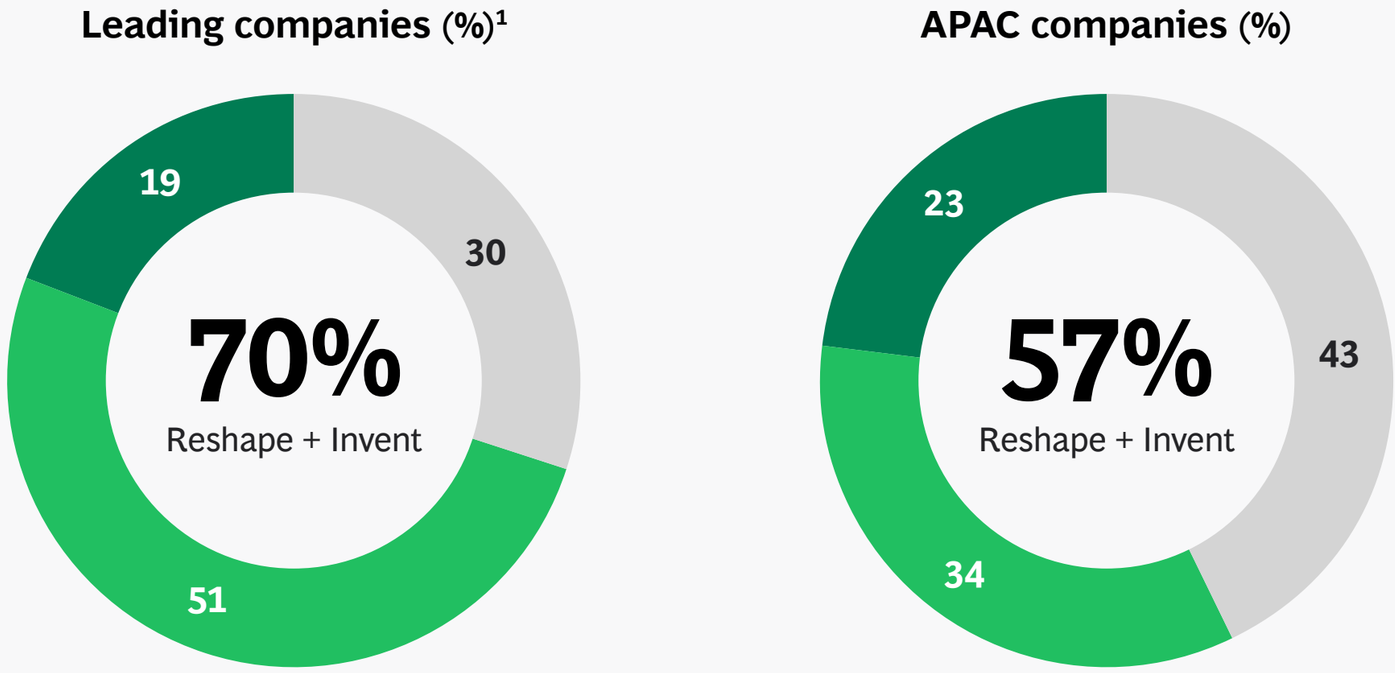


Invent new business models to create new value propositions and revenue streams

Source: BCG.

While leading companies go well beyond the deployment of AI processes and tools, those in APAC are not yet prioritizing investments in areas that bring high impact

Companies at the forefront of AI adoption invest much more in redesigning end-to-end workflows than our APAC respondents



Sources: BCG Build for the Future Global Study, 2025; AI at Work APAC, July 2025 (N=2,516); AI at Work Global, 2025: Japan (n=1,012) + India (n=1,031); BCG analysis.
Note: Survey question: How is your organization currently implementing GenAI tools?
[1]Leading companies were defined as those at the forefront of AI innovation globally, systematically building cutting-edge AI capabilities across functions and consistently generating substantial value.

Strategic imperatives for leaders in Asia Pacific

1

Turn bottom-up energy into enterprise-wide impact

Businesses should harness the region's uniquely high frontline adoption by redesigning workflows and governance from the top down so that experimentation becomes transformation.

2

Close the leadership gap in AI enablement

Only one in three frontline workers feel supported by leadership. By providing strong sponsorship, clear guidance, and access to the right tools, businesses can dramatically lift optimism, adoption, and feelings of job security.

3

Formalize governance before "shadow" AI takes over

With 58% of employees willing to use AI without company approval, leaders must establish clear policies, risk controls, and sanctioned platforms to ensure innovation happens safely.

4

Invest in reskilling to sustain the AI advantage

Businesses should reshape roles and capabilities to match the pace of change—embedding AI literacy across all levels to move from one-off tools to lasting productivity gains.

5

Move beyond pure deployment to redesign and invention

APAC firms risk plateauing at high adoption and low transformation. They should follow global leaders by focusing 70% of AI investments on reshaping critical functions and inventing new products and services.

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