

Everyone is using AI. Few can show the return.

McKinsey's 2026 survey of 1,719 organisations in 97 nations finds AI use deepening, individual productivity up, and enterprise returns flat for a second year. The gap between the two is where the work is. Every figure on this sheet is a share of respondents, as published.

Survey fielded 4 May to 8 June 2026, published 25 August 2026 Weighting by each nation's share of global GDP Large organisations have annual revenue above \$1 billion

THE GAP BETWEEN USE AND RETURN

37%

of respondents attribute any EBIT impact to AI, about the same share as a year ago. Eighty percent say AI improved their own productivity. Six percent qualify as high performers, with 5% or more of EBIT from AI and an impact they call significant.

Source: McKinsey, The state of AI in 2026 · key takeaways and Exhibit 5

ADOPTION TO VALUE

The AI value gap, 2026

Use AI regularly
in at least one function, "nearly nine in ten"

~88%

0100

Scaling AI across the enterprise
up from 38% a year ago

44%

0100

Any EBIT impact
essentially unchanged from 2025

37%

0100

High performers
5% or more of EBIT and "significant" value

~6%

0100

Shares of all respondents.

High performers attribute 5% or more of EBIT to AI and call its impact significant. Exhibit 1 and key takeaways.

2025 TO 2026

What moved in a year

20252026

AI in three or more functions 51%56% AI in three or more functions

Scaling AI enterprise-wide 38%44% Scaling AI enterprise-wide

Large firms scaling agents 27%40% Large firms scaling agents

Smaller firms scaling agents 22%22% Smaller firms scaling agents

Scaling agents means in one or more functions. The whole year's movement in agents came from large organisations. Exhibits 1 and 2.

OPERATING COST

AI operating costs, tokens included, are limiting use

Limited by operating cost 20%

Not limited 80%

20%

Limited by operating cost of the whole

About one in five, across company sizes and industries. Per tool, about one in ten; high performers hit it three times as often on coding agents. Exhibits 8 and 14.

INVESTMENT

Still spending more

Spend over 10% of ICT budget on AI

Expect to invest more next year

28%

60%

A design constraint rather than a brake. Six in ten expect to spend more.

Pharma, insurance and banking most expect increases. High performers are more than twice as likely to spend over 15%. Exhibit 9.

TOOLS

Scaling each tool across the enterprise

47%

AI chatbots

~20%

Coding agents

~20%

AI agents

Agents and coding agents are "about two in ten"; coding agents reach 31% at large organisations. Exhibit 3.

BY COMPANY SIZE

Scaling, large against smaller

Revenue above \$1bn

Smaller

60%

AI across the enterprise

20%

AI agents

Enterprise-wide AI 54% against 33%, "one-third" in the report. Agents 40% against 22%. Exhibits 1 and 2.

TAKEAWAYS

Nine numbers to carry out of the room.

37%

report any EBIT impact from AI, flat on last year, while 80% say AI improved their own productivity.

6%

are high performers, attributing 5% or more of EBIT to AI and calling the impact significant. Also flat.

44%

are scaling AI across the enterprise, up from 38%. Fifty-six percent use it in three or more functions.

40%

of large organisations scale agents, up from 27%. Smaller organisations stayed at 22%.

32%

built software rather than bought it because agentic coding tools could. Nearly half of high performers did.

1 in 5

is limited by AI operating cost, tokens included. Six in ten still expect to spend more next year.

60%

expect to increase AI investment next year. Twenty-eight percent already spend over a tenth of their ICT budget on it.

14%

reported AI-driven head count declines, against 32% who expected them a year ago. Now 39% expect them.

47%

of mid-level staff report an AI-related strain, against 31% of executives. Just 13% are anxious about their own career.

Every figure on this sheet

Claimed

Self-reported
CURRENT RUNG

Measured

Audited

The next rung. A Placement Assessment measures your own baseline, like for like, in two weeks.

OTHERS AGAINST HIGH PERFORMERS

The practices that separate the six percent

Others

High performers

Redesigned workflows

+48%

Built, not bought, software

+17%

Will raise AI spend 10%+

+16%

Report wording plotted at the nearest whole number, "nearly three-quarters" as 73 (55% a year ago), "nearly half" as 48, "more than half" as 52. Exhibits 10 and 13.

BUILD, NOT BUY

Decided against buying software because coding agents could build it

Counted

The rest

32

of every 100 organisations

32%

Most often in technology and healthcare, then professional services and energy and materials. Among high performers it is nearly half. Exhibit 4.

INDIVIDUAL EFFECTS

What AI did for respondents personally

Productivity improved

80%

Better decisions

~50%

New skills developed

~50%

"About half" plotted as 50. Consistent across organisational levels. Exhibit 5.

HIGH PERFORMERS AGAINST OTHERS

How much more likely high performers are to be...

Transforming the business with AI

3.3x

Scaling agents in most functions

3x

Scaling agentic AI beyond coding

2.7x

Scaling software coding agents

2x

Leaders committed to AI initiatives

2x

Measuring the impact of AI initiatives

2x

Spending 15%+ of ICT budget on AI

2x

Labels are shortened; the report's full wording is in the figure ledger. The last is "more than twice", plotted as 2. High performers are also much more likely to be mitigating technical vulnerabilities and unintended actions. Exhibits 10 to 15.

TIPS · THE LEVANTAR READING

01

Measure before you scale.

Most of the 63% cannot show an EBIT effect either way. The baseline is the first deliverable.

02

Redesign the workflow, not the tool.

Nearly three-quarters of high performers rebuilt the process around AI. One in four of the rest did.

03

Run on cost per outcome.

Per resolved case, per matched invoice. It is the number that decides what stays switched on.

"The limiting factor is increasingly the organization's ability to absorb change."
Tara Balakrishnan, associate partner, McKinsey, in the report

WORKFORCE

AI-driven head count declines, expected against reported

Expected a decline, asked in 2025

14%

Expected a decline, 2026

Expected a decline next year

Expected little or no change

Expected 32%, reported 14%, expected next year 39%, little or no change 43%. Two-thirds saw little or no AI-related change last year. Exhibits 16 and 17.

STRAIN BY LEVEL

Report at least one negative AI-related effect

Reported a negative effect

Did not

Mid-level staff

Executives

Mid-level managers and individual contributors against executives and senior managers. The people closest to the work feel the strain most. Exhibit 5.

Say AI makes them anxious about their own career prospects

13%

Most do not see AI as a threat to their own job, even as 39% expect their organisation's head count to fall. Exhibit 16.

Levantartar

Source: McKinsey Global Survey, "The state of AI in 2026: On the road to ROI", Tinkoff, Van der Veken, Chui and Balakrishnan, 25 August 2026. Online survey of 1,719 participants in 97 nations, 4 May to 8 June 2026; 36% from organisations with revenue above \$1 billion; weighted by nation share of global GDP. Where the report gives a figure in words ("nearly three-quarters", "about two in ten") the chart plots the nearest whole number and says so. Charts by Levantar from its own component set.

levantar.ai · put AI only where it works
An AI poster from the Levantar brand kit · September 2026