HPA HighPoint Associates

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Gen AI and the Workforce Survey

Q2 2026

Zach

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Executive Summary

OVERVIEW

- HPA's Q2 2026 Economic and Business Outlook Survey was conducted April 17-24, 2026, in partnership with Eden McCallum, a European-based firm
- We surveyed 256 senior business leaders across the U.S., UK, and Rest of World (RoW), spanning a broad range of industries (e.g., professional services, industrials, consumer goods) and representing organizations from small privately held companies to large public enterprises
- Nearly half hold C-suite or Executive titles, and 48% represent PE-backed or publicly listed companies, reflecting how senior leadership and complex organizations are actively responding to the AI agenda

RESULTS

- Data and AI usage ranks as the top internal priority for most organizations, with over 50% encouraging staff to experiment, share use cases, and upskill
- Larger organizations are more likely to be making workforce changes due to AI, while smaller organizations remain predominantly in the experimentation phase
- Organizations who reported optimizing data and AI as a top priority are far more likely to be taking concrete action, particularly in recruiting for AI skills and delivering training
- 40% of organizations are already operating an agentic workforce alongside their human teams to some degree, with the U.S. and RoW leading adoption
- While larger organizations lead overall agentic workforce adoption; small organizations emerge as one of the most significant users of AI agents
- Two-thirds of organizations expect AI to impact their overall workforce size, with roughly 25% anticipating a net reduction. Of those, 60% are already hiring fewer staff this year, with larger organizations most likely to be forecasting a smaller workforce
- Across all geographies, workforce size shifts are anticipated, with RoW most likely to expect a decline
- More than 25% of organizations are anticipating to reduce their recruitment because of AI this year, with 40% expecting to recruit the same number, and 30% not yet sure (primarily due to varying needs by department or plans still being in development)
- Entry-level, customer service, and administrative roles are the most exposed for recruitment reduction, with most planned reductions in the 1-10% range

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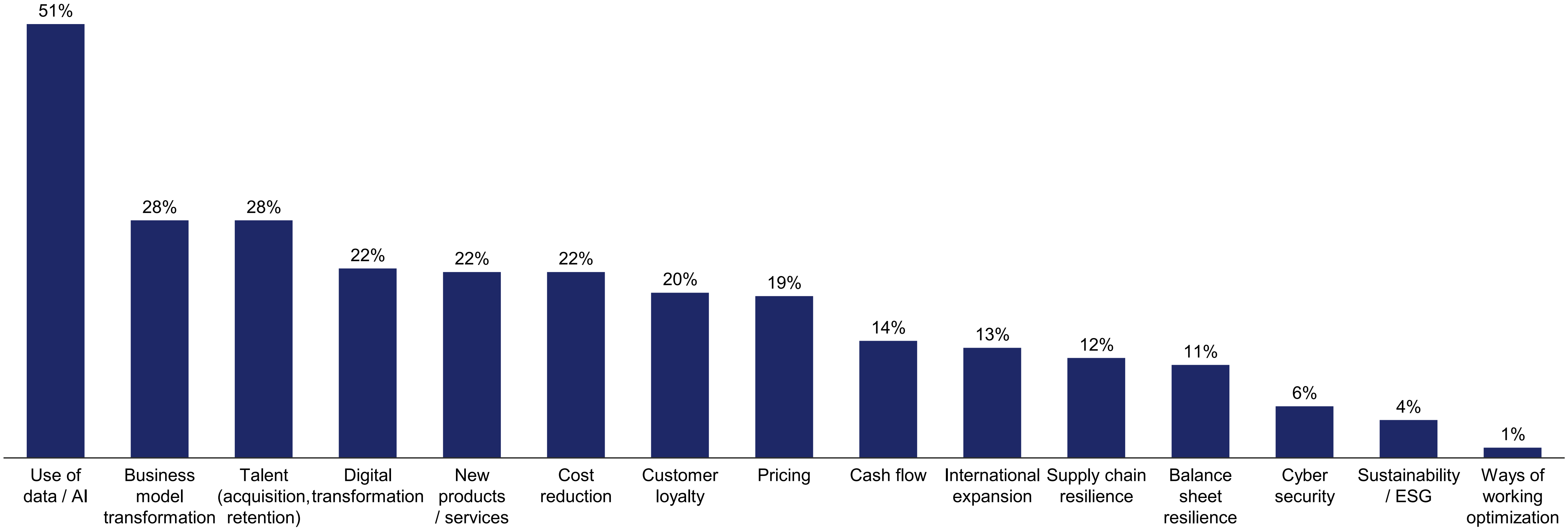
Globally, half of organizations continue to prioritize optimizing AI and data usage as a top issue

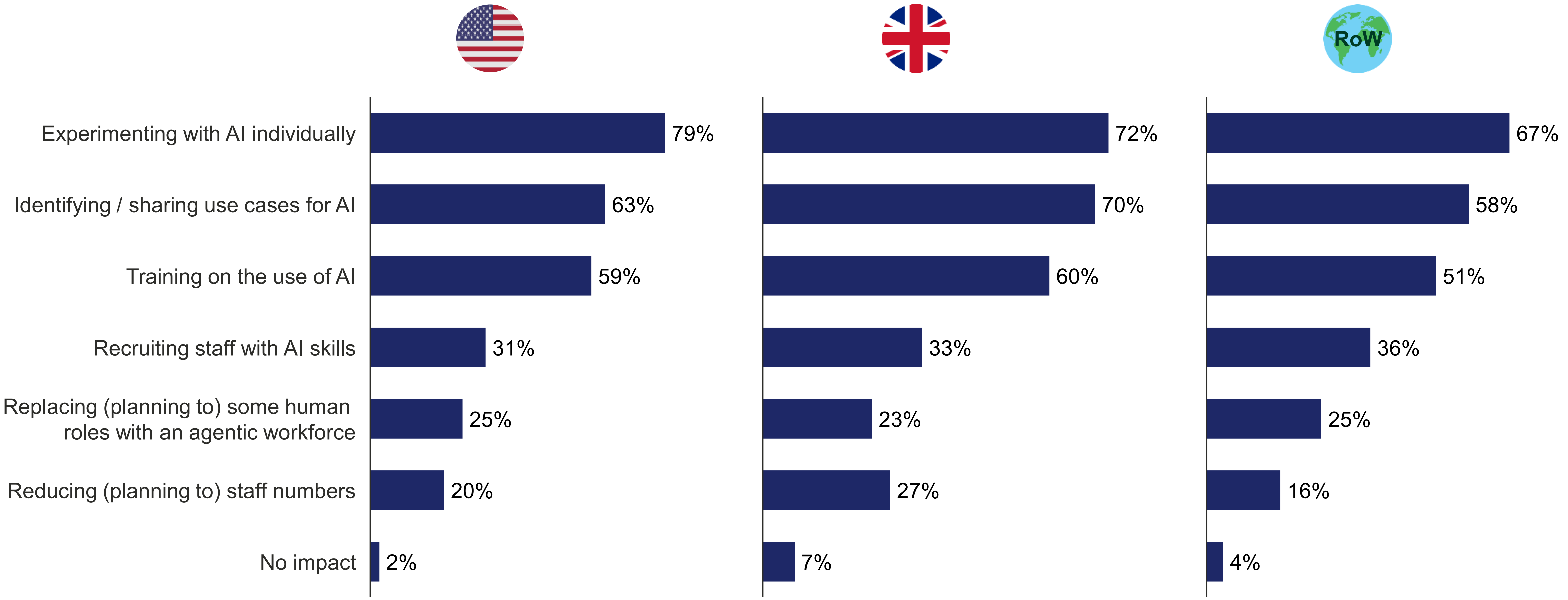
Most important internal issues for businesses (Q2 ’26)



n: 245
Notes: Participants could select a maximum of 3 answers. Excludes those who answered ‘Don’t know’. 4% responded ‘Other’
Source: HPA Business Outlook Survey: Q13 - What are the most important internal issues for your company over the next 1-2 years? [Please select up to three]

A quarter of U.S. organizations are replacing or planning to replace some human roles with an agentic workforce

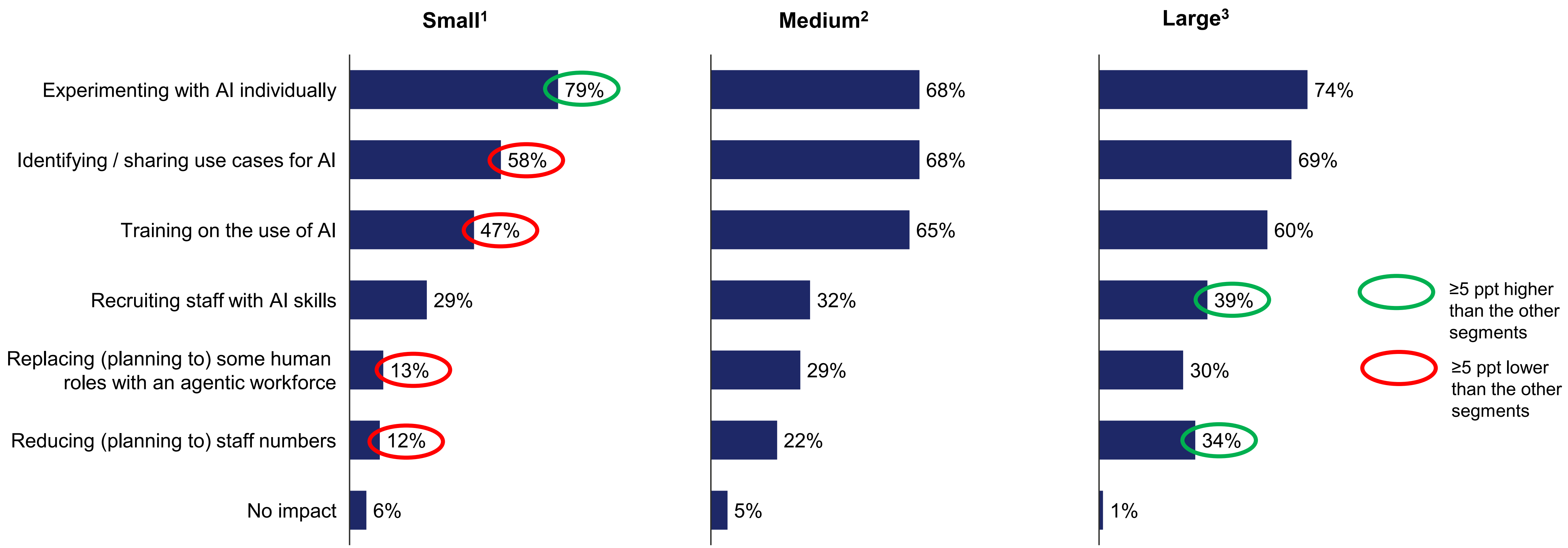
AI's impact on organizations' workforces (Q2 '26), by geography



n: 241 (U.S. n: 81; UK n:105; RoW n: 55)
Notes: 5% responded 'Other' (4% U.S., 8% UK, 3% RoW)
Source: HPA Business Outlook Survey Q2 '26: Q16 - In what ways, if any, is AI impacting your workforce? [Select all that apply]

Large organizations are more likely to be recruiting staff with AI skills and planning to reduce staff numbers as a result of AI

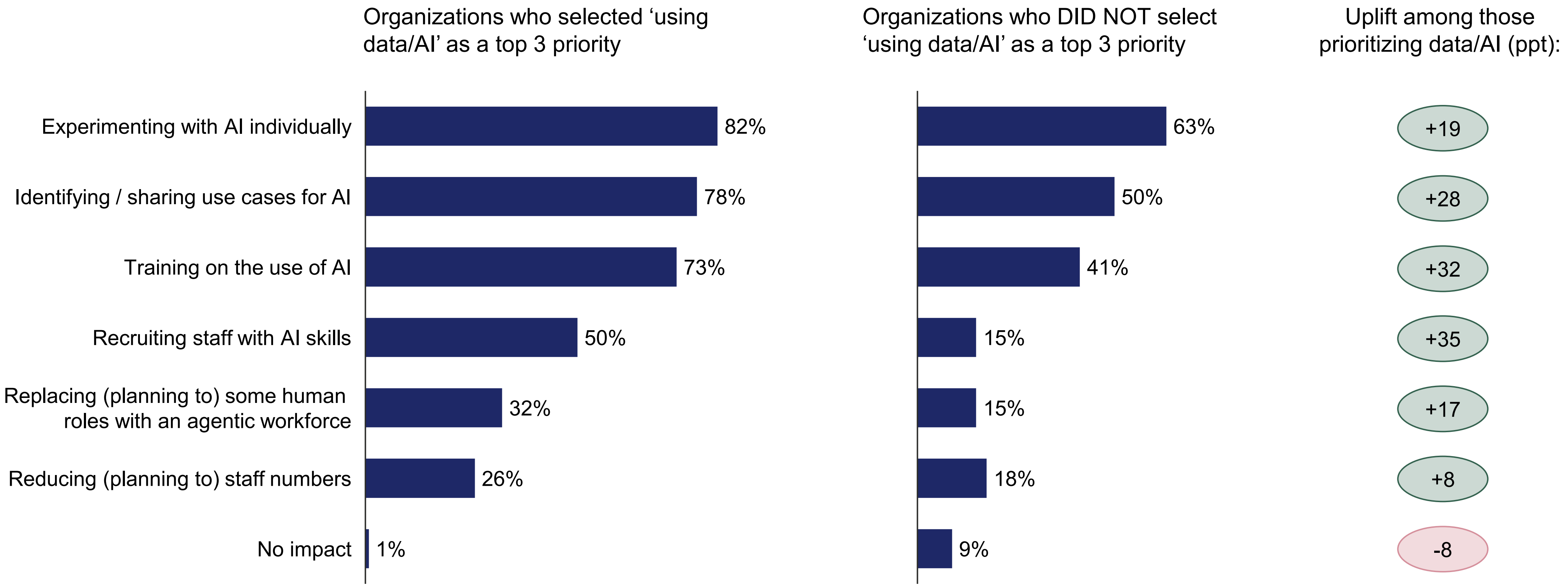
AI's impact on organizations' workforces (Q2 '26), by company size



n: 241 (Small n: 78; Medium n: 93; Large n: 70)
Note: (1) <250 employees; (2) 250-4999 employees; (3) 5000+ employees. 5% responded "other' (5% Small businesses; 8% Medium businesses; 1% Large businesses)
Source: HPA Business Outlook Survey Q2 '26: Q16 - In what ways, if any, is AI impacting your workforce? [Select all that apply]

Organizations who cited AI as a top priority are, unsurprisingly, enacting AI adoption among their workforce much more actively

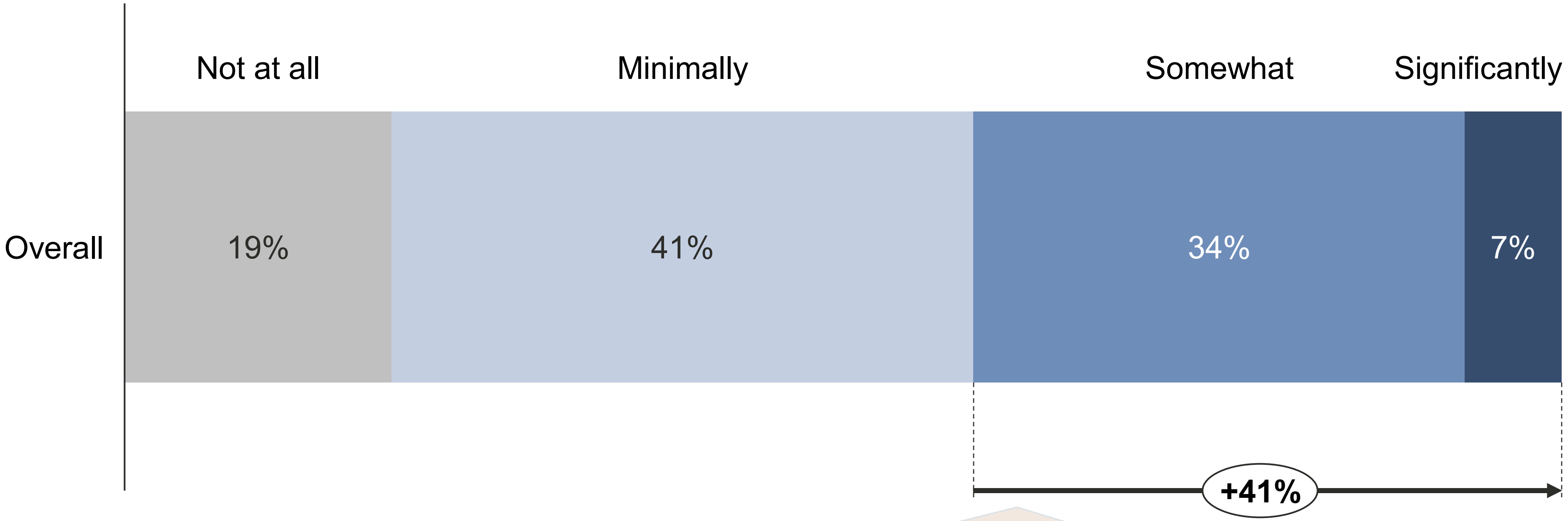
AI's impact on organization's workforces (Q2 '26), by level of prioritization



n: 125
Note: Excludes those who responded 'Don't know' in Q13; 5% selected 'Other' in each group
Source: HPA Business Outlook Survey Q2 '26: Q16 - In what ways, if any, is AI impacting your workforce? [Select all that apply]; Q13 - What are the most important internal issues for your company over the next 1-2 years? [Please select up to three]

~80% of organizations globally are using AI agents to some degree, although half of these report minimal usage of them

Extent of use of AI agents / co-workers / chatbots (Q2 '26)

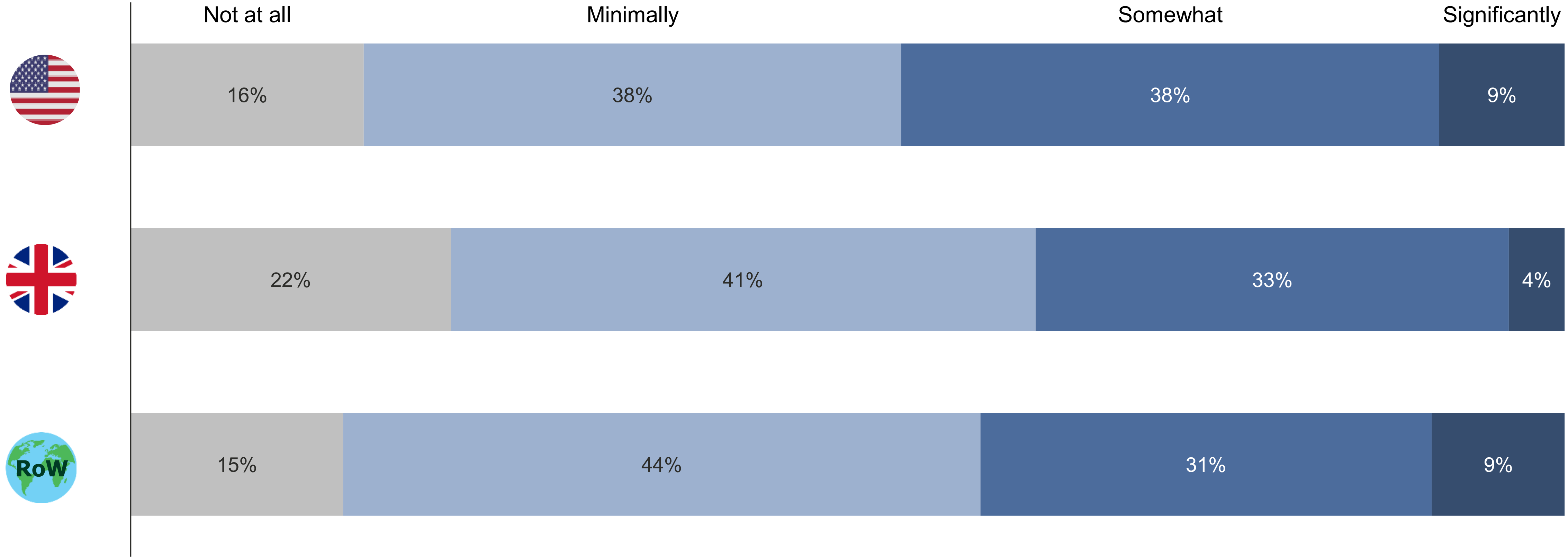


Financial services and TMT are slightly more likely to be Somewhat/Significantly using an agentic workforce (58% and 62% respectively), while consumer goods/retail and industrials/manufacturing are less likely (28% and 20% respectively)

n = 237 (of whom: Financial Services n= 24, Technology/Media/Telecommunications (TMT) n= 26, Consumer Goods (CG) /Retail n= 36, Industrials/Manufacturing n= 20)
Note: Excludes those who answered 'Don't know' (n=6)
Source: HPA Business Outlook Survey Q2 '26: Q17 – Thinking now specifically about your organization's agentic workforce: to what extent are you currently using AI agents / co-workers / chatbots in your workforce?

The U.S. and RoW are slightly ahead of the UK in terms of AI agent usage

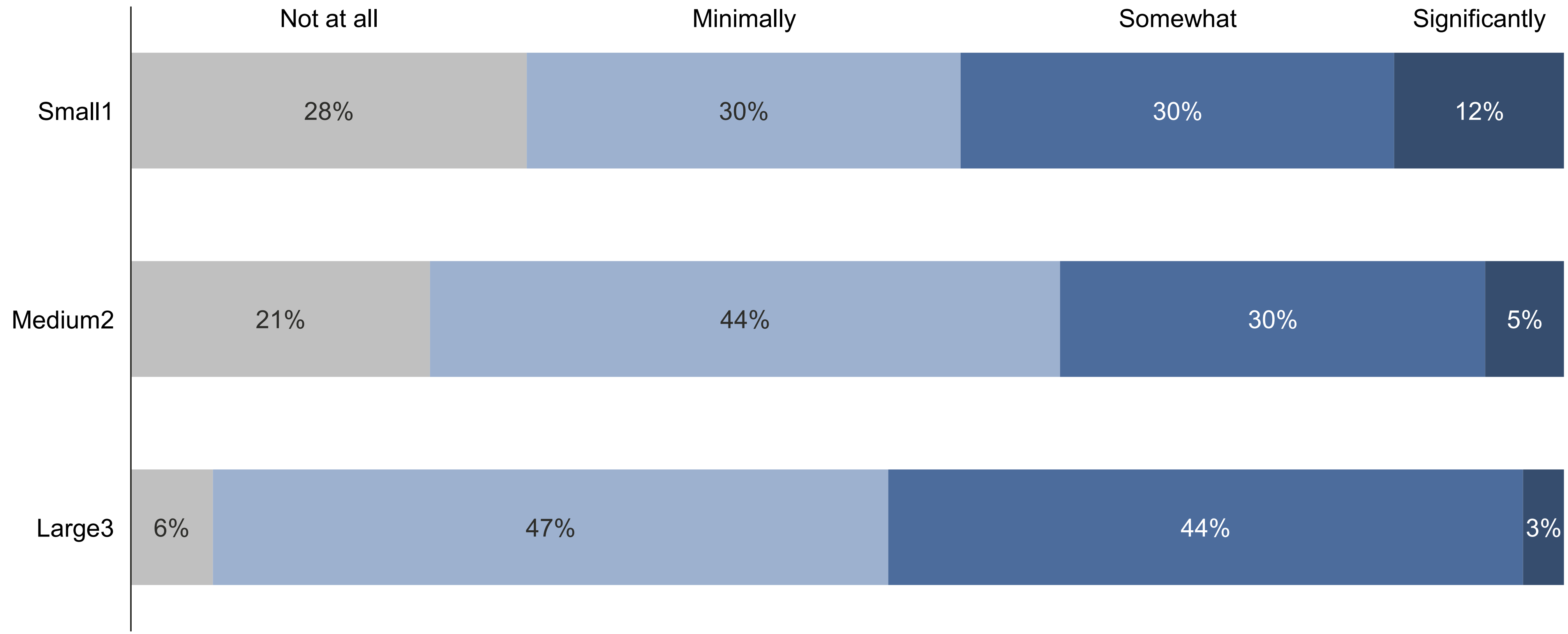
Extent of use of AI agents / co-workers (Q2 ’26), by geography



n = 237 (U.S. n: 103; UK n: 103; RoW n:54)
Note: Excludes those who answered ‘Don’t know’ (n=6)
Source: HPA Business Outlook Survey Q2 ’26: Q17 – Thinking now specifically about your organization’s agentic workforce: to what extent are you currently using AI agents / co-workers / chatbots in your workforce?

Interestingly, small organizations are the most significant users of AI agents, while a third still report not using AI agents at all

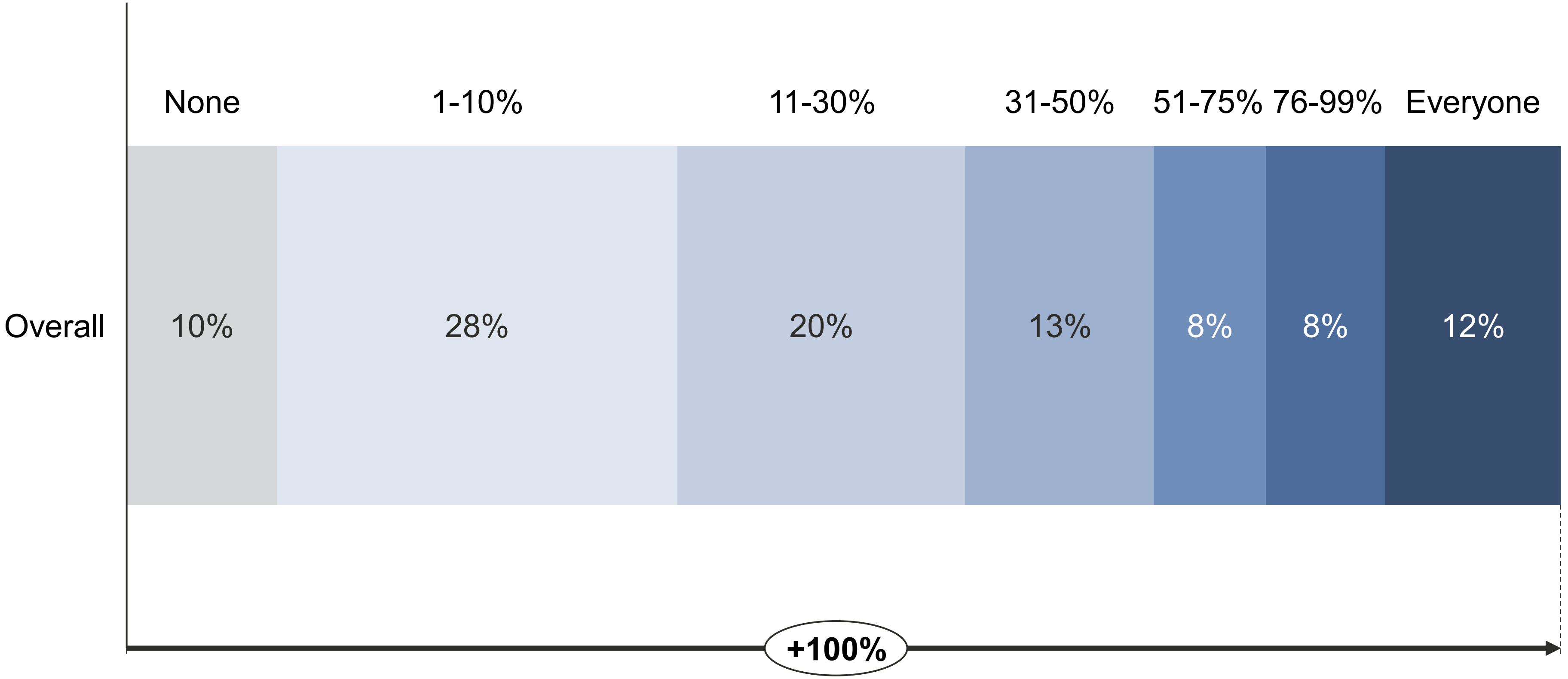
Extent of use of AI agents / co-workers (Q2 ’26), by organization size



n = 237 (Small n: 76; Medium n: 91; Large n: 70)
Note: Excludes those who answered ‘Don’t know’ (n=6); (1) <250 employees; (2) 250-4999 employees; (3) 5000+ employees
Source: HPA Business Outlook Survey Q2 ’26: Q17 – Thinking now specifically about your organization’s agentic workforce: to what extent are you currently using AI agents / co-workers / chatbots in your workforce?

~30% of organizations are training at least half of their staff on AI, with a further 60% training at least some of their staff

Percentage of staff being trained on AI, (Q2 ’26)

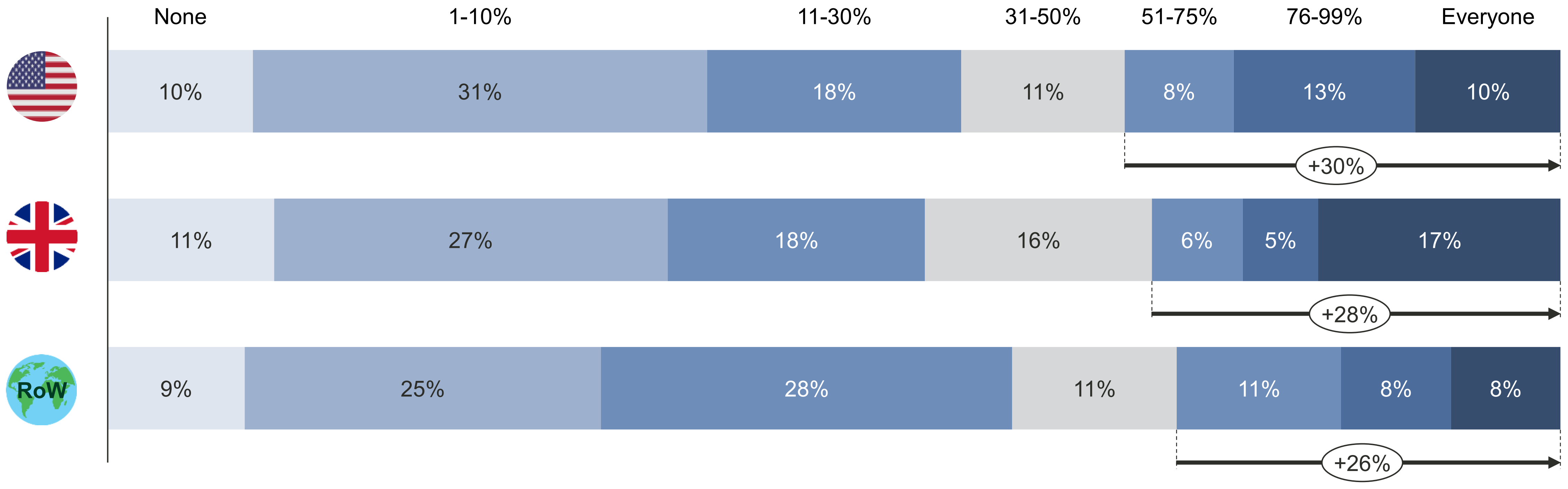


Financial services and B2B/professional services are more likely to be training over 50% of their staff (61% and 47% respectively) while consumer goods/retail and industrials/manufacturing are less likely (6% and 11% respectively)

n = 229 (of whom, FS n = 24, B2B/professional services n= 50, CG/retail n= 37, Industrials/manufacturing n= 21)
Note: Excludes those who answered ‘Don’t know’ (n=14).
Note Q18 vs. Q16 results: 76 people selected between 1% and everyone being trained in Q18 but didn’t select ‘training’ in Q16. Of those, 57% are training 1-10% and 29% are training 11-30%
Source: HPA Business Outlook Survey Q2 ’26: Q18 – Thinking now about human workforce training: what % of your staff are being given training on the use of AI? Your best estimate will do.

The extent to which AI training is occurring across workforces is similar across the U.S. and UK, and slightly lower in RoW

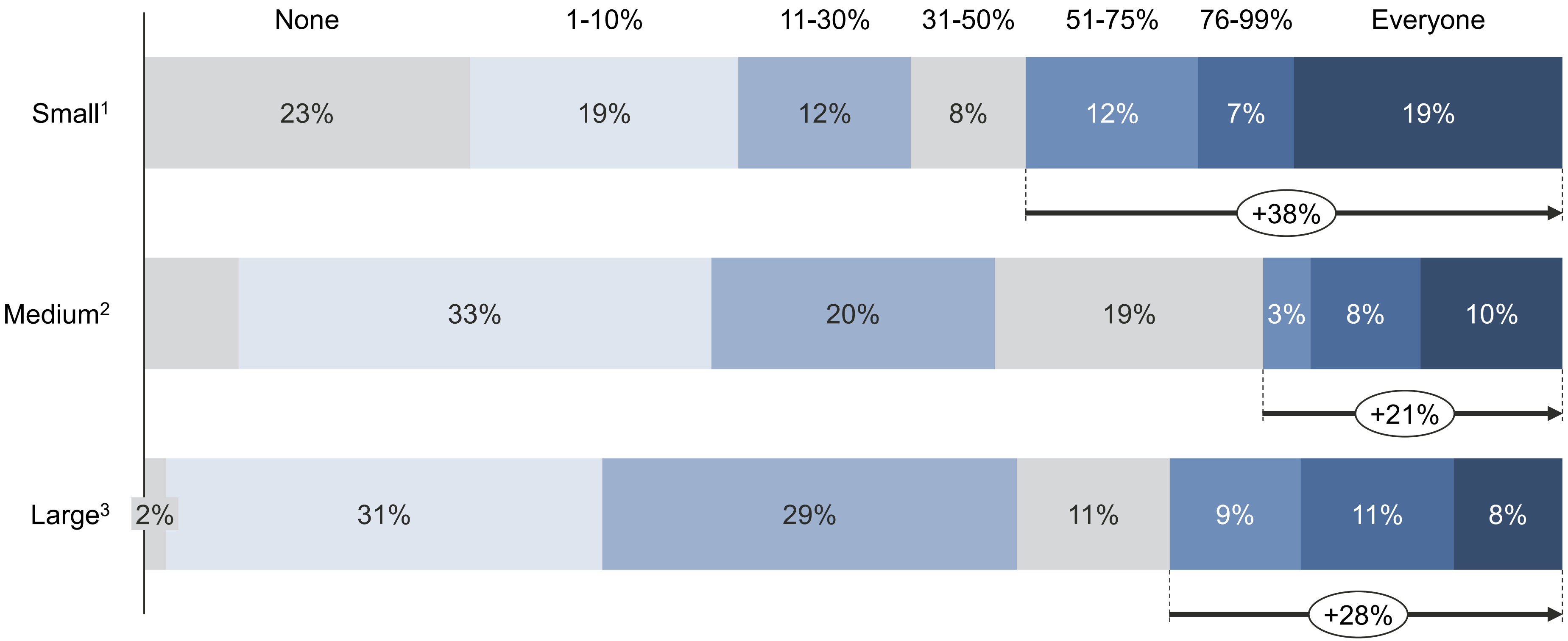
Percentage of staff being trained on AI (Q2 ’26), by geography



n = 229 (U.S. n: 80; UK n: 96; RoW n: 53)
Note: Excludes those who answered ‘Don’t know’ (n=14)
Source: HPA Business Outlook Survey Q2 ’26: Q18 – Thinking now about human workforce training: what % of your staff are being given training on the use of AI? Your best estimate will do.

Smaller organizations are more likely to be training at least 50% of their staff on AI; however, a large proportion also provide zero training

Percentage of staff being trained on AI (Q2 ’26), by organization size

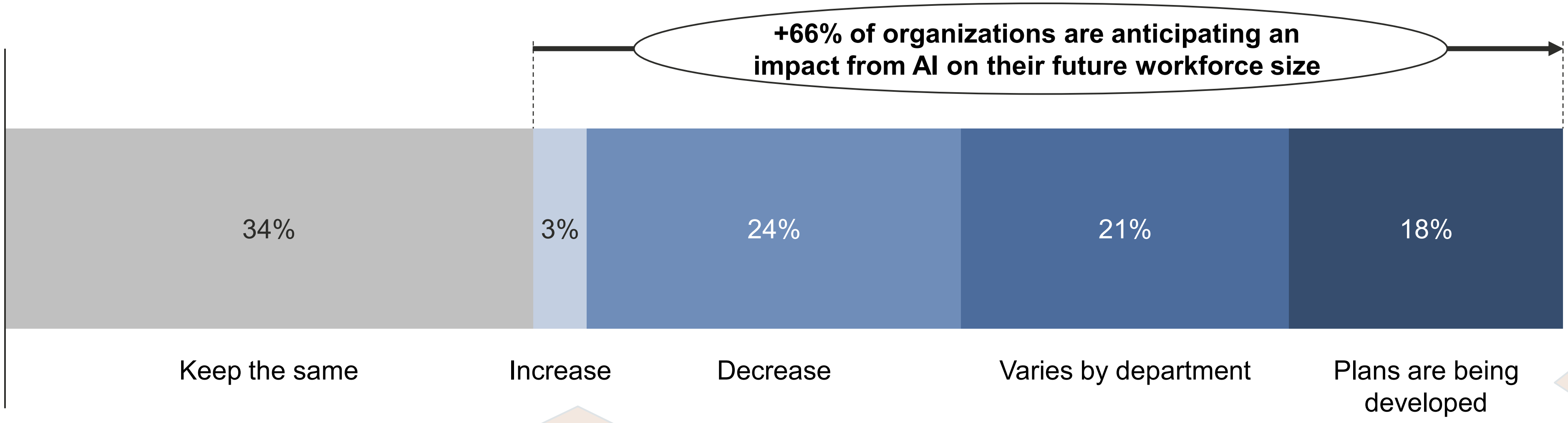


- Small organizations in the sample are more weighted towards B2B/professional services[4] and PE/VC[5] (the former of which are more likely to train >50% of their staff)
- Medium and large organizations in the sample are more weighted towards CG/retail (who are less likely to train >50% of their staff)

n = 229 (Small n: 74; Medium n: 90; Large n: 65)
Note: Excludes those who answered ‘Don’t know’ (n=14); (1) <250 employees; (2) 250-4999 employees; (3) 5000+ employees, (4) 35% vs. 13.5% for medium/large, (5) 14% vs. 2.5% medium/large, (6) 20% of medium organizations & 22% of large organizations vs. 6% of small organizations
Source: HPA Business Outlook Survey Q2 ’26: Q18 – Thinking now about human workforce training: what % of your staff are being given training on the use of AI? Your best estimate will do.

Two-thirds of organizations globally expect AI to impact future workforce size, with only 3% of organizations expecting AI to increase the size of their workforce.

Anticipated impact of AI on overall future size of workforce, (Q2 ’26)



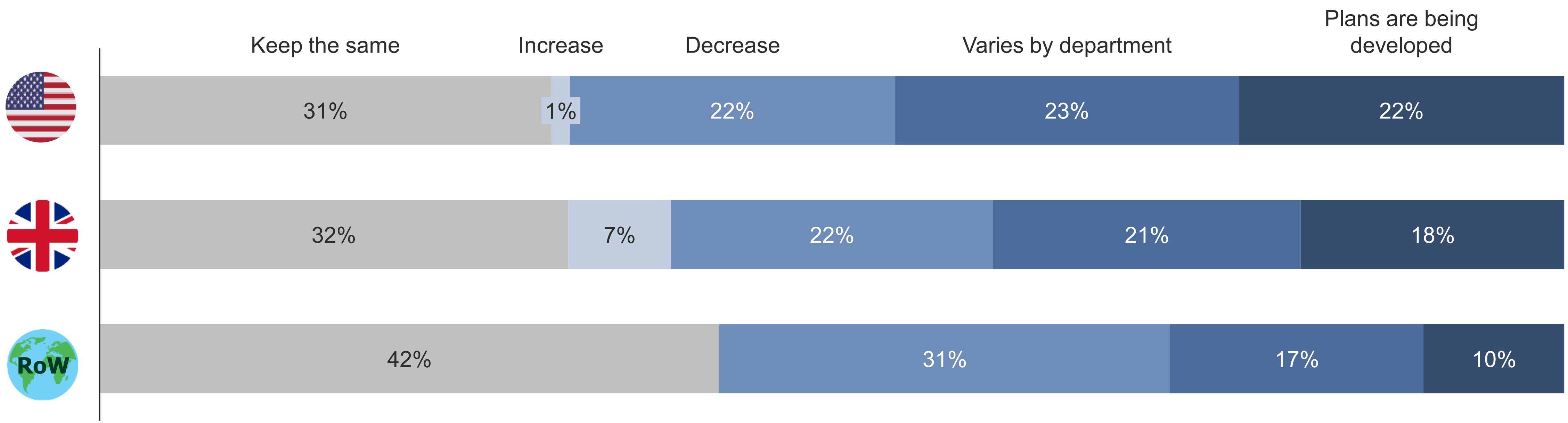
Some variation by sector – TMT are slightly more likely to expect a decrease (35%), B2B/professional services makes up majority (75%) of those expecting an increase, while CG/retail find it more difficult to estimate (53%)

60% of those expecting an overall decrease in the future size of their workforce are **already planning to recruit fewer staff this year**

n = 233 (of whom TMT n=28, B2B/professional services n= 48, CG/retail n=36)
Note: Excludes those who answered ‘Don’t know’ (n=10)
Source: HPA Business Outlook Survey Q2 ’26: Q19 - Thinking now about AI and its impact on the size of your organization's human workforce, overall – and all other things being equal – is AI leading you to: [select one]

While there is some variation, all geographies are anticipating shifts in their overall future workforce size, with RoW most likely to anticipate a decrease

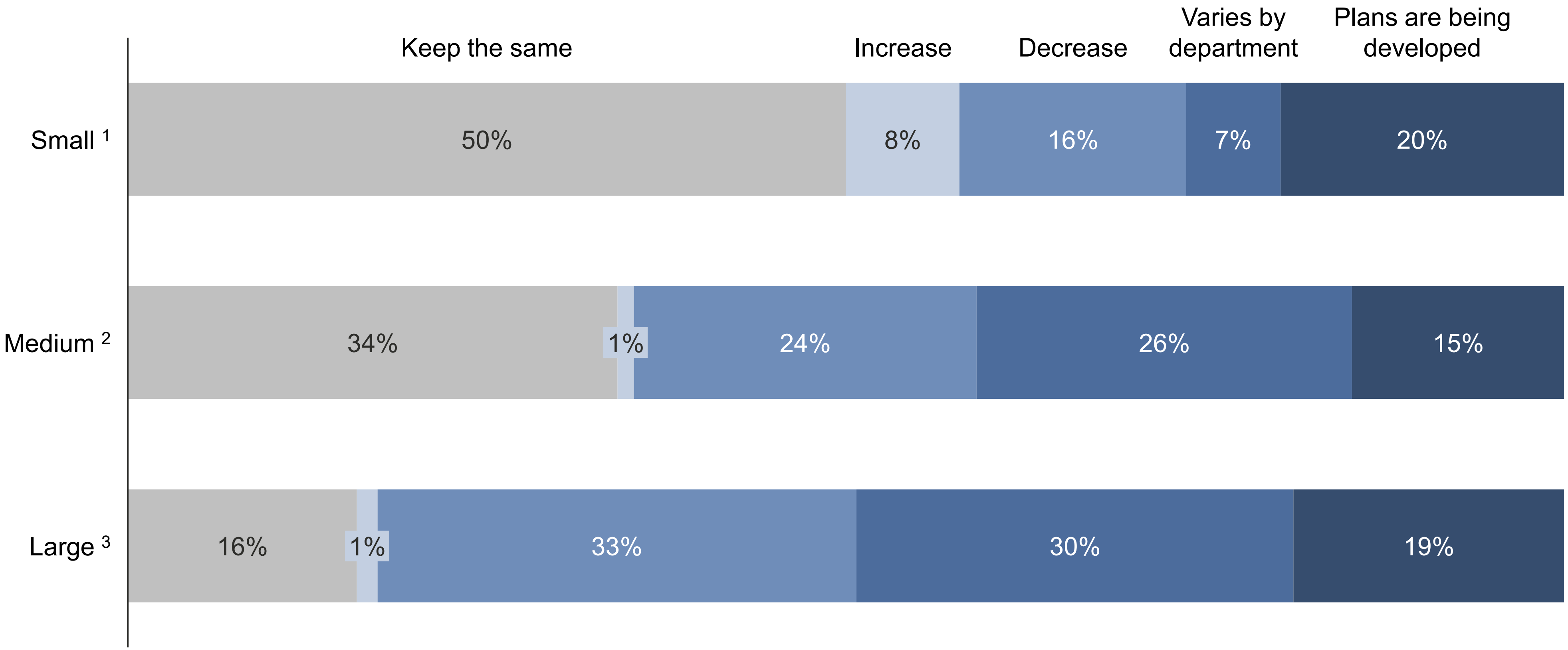
Anticipated impact of AI on overall future size of workforce, by geography, (Q2 ’26)



n = 233 (U.S. n:81; UK n: 100; RoW n:52
Note: Excludes those who answered ‘Don’t know’ (n=10)
Source: HPA Business Outlook Survey Q2 ’26: Q19 - Thinking now about AI and its impact on the size of your organization’s human workforce, overall – and all other things being equal – is AI leading you to: [select one]

Smaller organizations are most likely to expect their future workforce to remain the same size, while larger organizations are more likely to expect decreases

Anticipated impact of AI on overall future size of workforce, by size, (Q2 ’26)



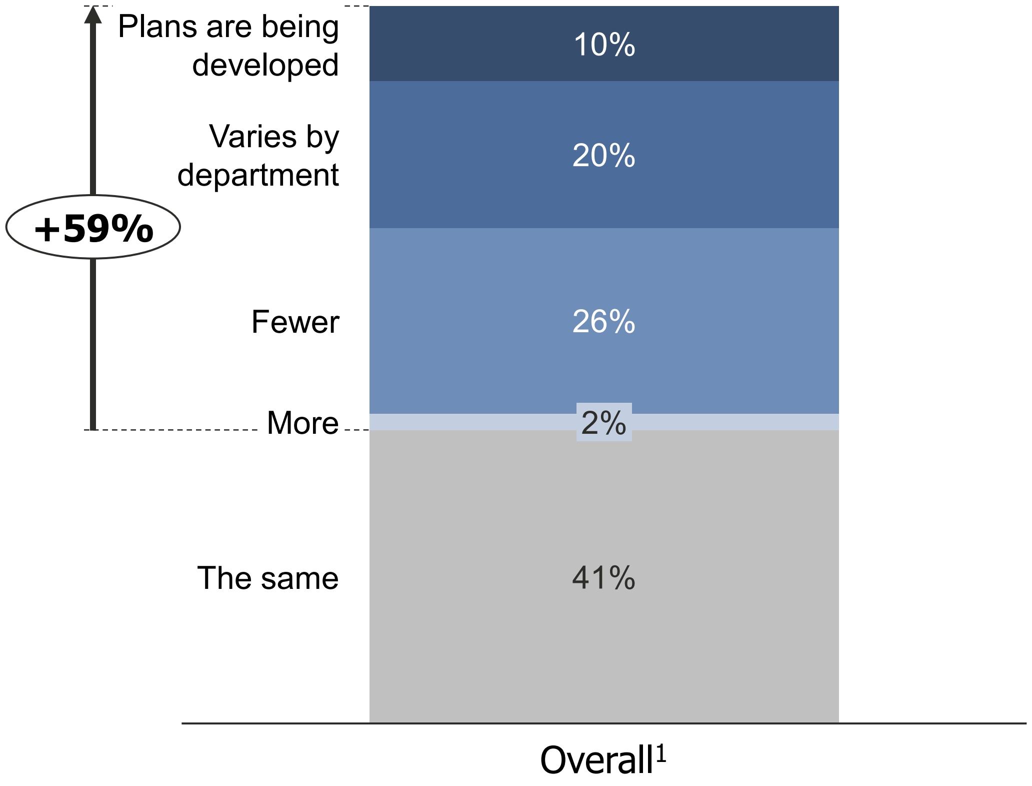
- Small organizations in the sample are more weighted towards B2B/professional services[4] and PE/VC[5] (the former are more likely to ‘Increase’ and the latter to ‘Keep the same’
- Medium and large organizations in the sample are more weighted towards CG/retail who are more likely to find it ‘difficult to estimate’ (either ‘Varies by department’ or ‘Plans being developed’)

n = 233 (Small n: 76; Medium n: 94; Large n: 71)
Note: Excludes those who answered ‘Don’t know’ (n=10); (1) <250 employees; (2) 250-4999 employees; (3) 5000+ employees, (4) 12.5% responded Increase vs. 3% for the overall survey, (5) 64% Keep same vs.34% for the overall survey)
Source: HighPoint Associates Business Outlook Survey Q2 ’26: Q19 - Thinking now about AI and its impact on the size of your organization's human workforce, overall – and all other things being equal – is AI leading you to:

AI is already influencing recruitment plans at ~60% of organizations, with only 2% anticipating higher recruitment levels

Anticipated impact of AI on recruitment plans this year, (Q2 ’26)

~60% are changing their recruitment plans this year because of AI – of whom nearly half are planning to reduce fewer staff

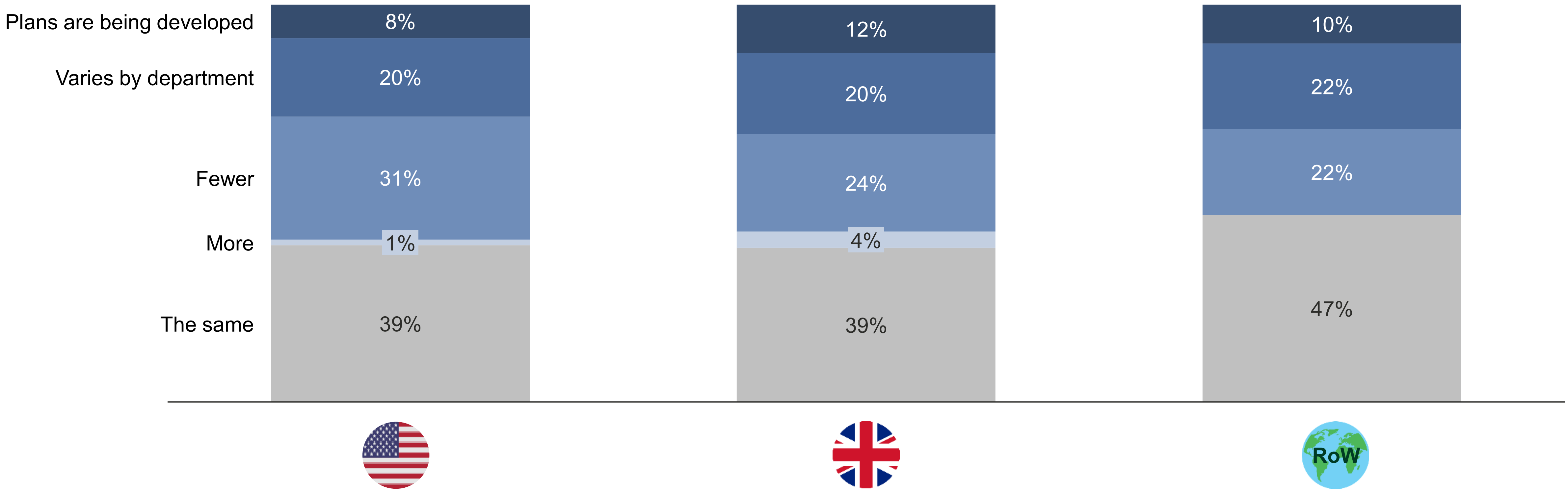


Limited variation by sector – TMT are slightly more likely to reduce recruitment this year (44%) while FS slightly less likely to do so (14%)

n = 220; Note: (1) Excludes those who answered ‘Don’t know’ (n=23)
Source: HPA Business Outlook Survey Q2 ’26: Q20 - And thinking specifically about your organization's staff recruitment plans this year, to what extent is AI leading you to recruit more, the same, or fewer staff overall than you would have otherwise?

The theme is similar by geography, though AI is slightly more likely to lead to declines in recruitment this year in the U.S.

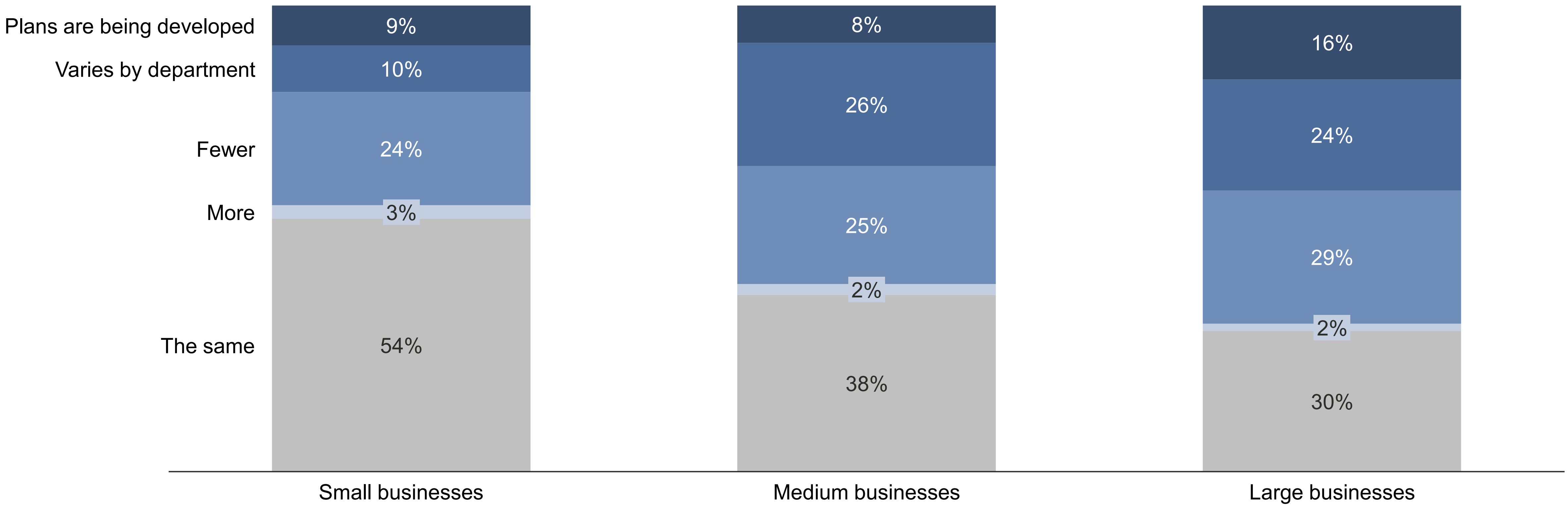
Anticipated impact of AI on recruitment plans this year (Q2 ’26) by geography



n = 220 (U.S. n: 71; UK n: 98; RoW n: 51)
Note: Excludes those who answered ‘Don’t know’ (n=23)
Source: HPA Business Outlook Survey Q2 ’26: Q20 - And thinking specifically about your organization's staff recruitment plans this year, to what extent is AI leading you to recruit more, the same, or fewer staff overall than you would have otherwise?

Larger organizations are more likely to adjust recruitment plans in response to AI, while smaller organizations expect little change

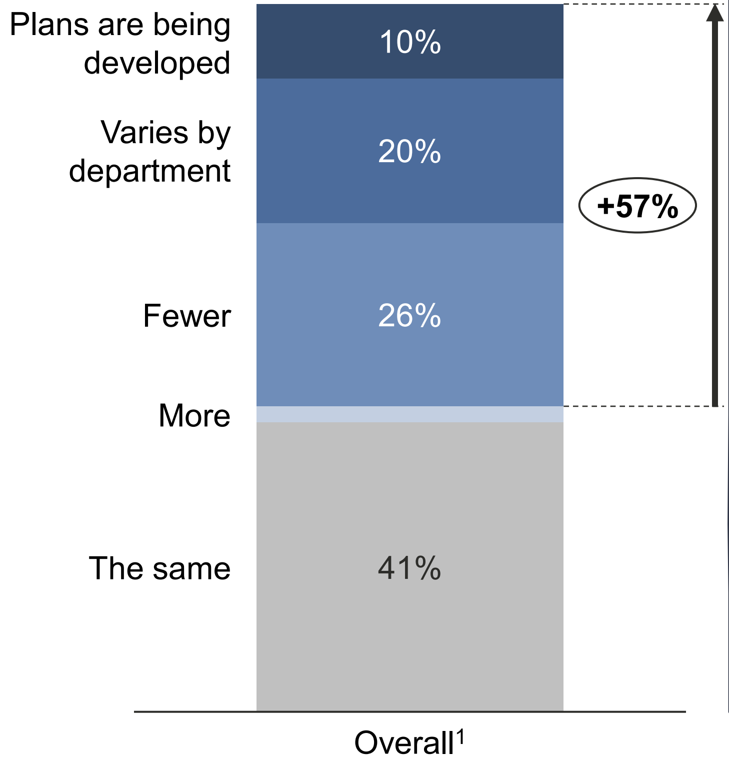
Anticipated impact of AI on recruitment plans this year (Q2 '26) by company size



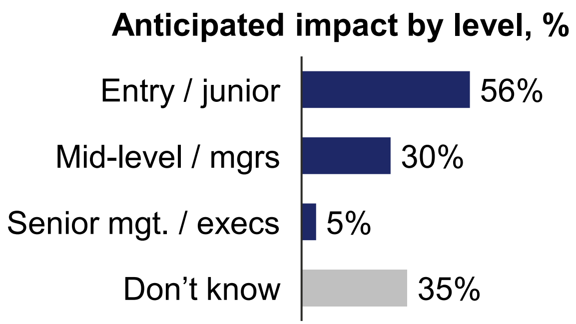
n = 220 (Small n: 70; Medium n: 87; Large: 63, excl. Don't know)
Note: Excludes those who answered 'Don't know' (n=23)
Source: HPA Business Outlook Survey Q2 '26: Q20 - And thinking specifically about your organization's staff recruitment plans this year, to what extent is AI leading you to recruit more, the same, or fewer staff overall than you would have otherwise?

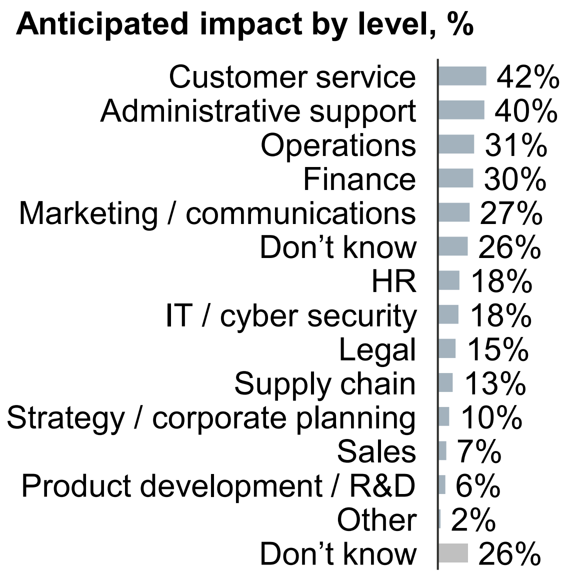
AI-driven recruitment changes are expected to affect entry-level talent most, particularly in customer service and administrative support roles

Anticipated impact of AI on recruitment plans this year (Q2 ’26)



For those either **recruiting fewer** staff this year, whose plans **vary by department**, or are **developing plans:**



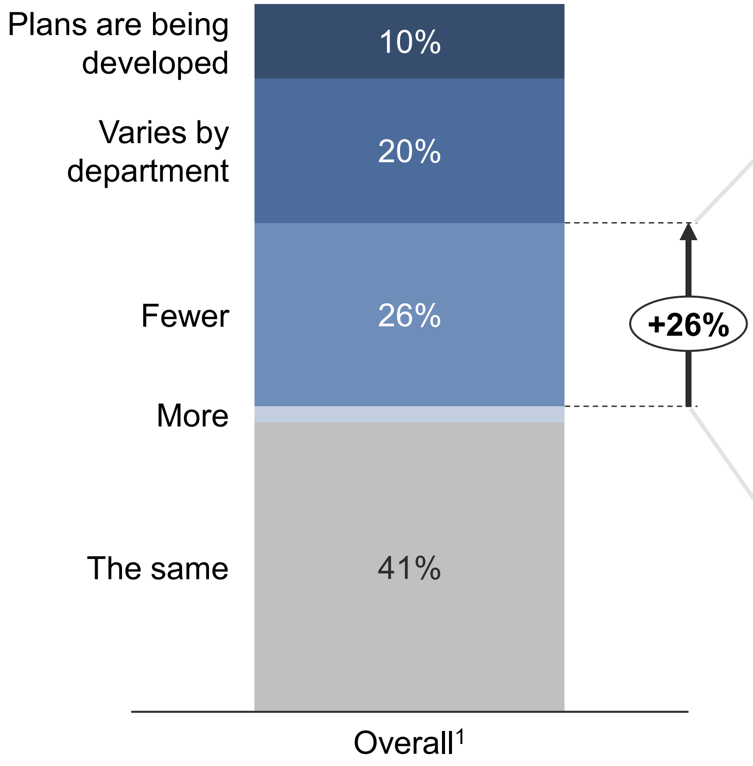


n = 220; Note: (1) Excludes those who answered ‘Don’t know’ (n=23)

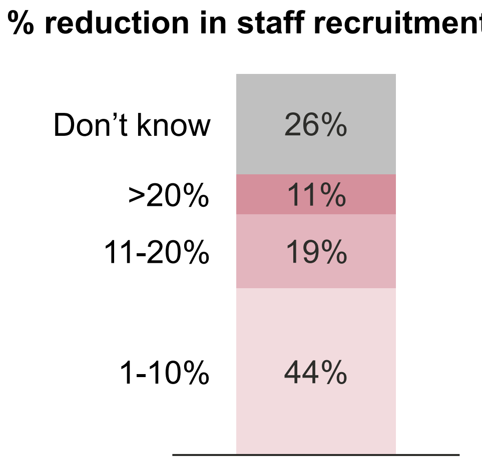
Source: HPA Business Outlook Survey Q2 ’26: Q20 - And thinking specifically about your organization's staff recruitment plans this year, to what extent is AI leading you to recruit more, the same, or fewer staff overall than you would have otherwise?; Q21 - At which level(s) are you reducing / planning to reduce staff recruitment due to AI? [Select all the apply]; Q22 - In which departments / areas of your organization are you reducing / planning to reduce staff recruitment due to AI? [Select all that apply] (Q21 & Q22 only answered by those who answered ‘Fewer’, ‘Varies by department’ or ‘Plans being developed’ in Q20)

Among organizations reducing recruitment because of AI, 44% are expecting reductions of just 1-10%

Anticipated impact of AI on recruitment plans this year (Q2 ’26)



Of the **26%** expecting to recruit **fewer** staff this year due to AI:



- **U.S. leaders** are reducing staff recruitment the most
- Those cutting 20%+ are split across **small and large** organizations

n = 220; Note: (1) Excludes those who answered ‘Don’t know’ (n=23)
Source: HPA Business Outlook Survey Q2 ’26: Q20 - And thinking specifically about your organization's staff recruitment plans this year, to what extent is AI leading you to recruit more, the same, or fewer staff overall than you would have otherwise?; Q23 - By what percent are you reducing / planning to reduce staff recruitment overall this year due to AI? Your best estimate will do. (Q23 only answered by those who answered ‘Fewer’ in Q20); Q21 - At which level(s) are you reducing / planning to reduce staff recruitment due to AI? [Select all the apply]; Q22 - In which departments / areas of your organization are you reducing / planning to reduce staff recruitment due to AI? [Select all that apply] (Q21 & Q22 only answered by those who answered ‘Fewer’, ‘Varies by department’ or ‘Plans being developed’ in Q20)

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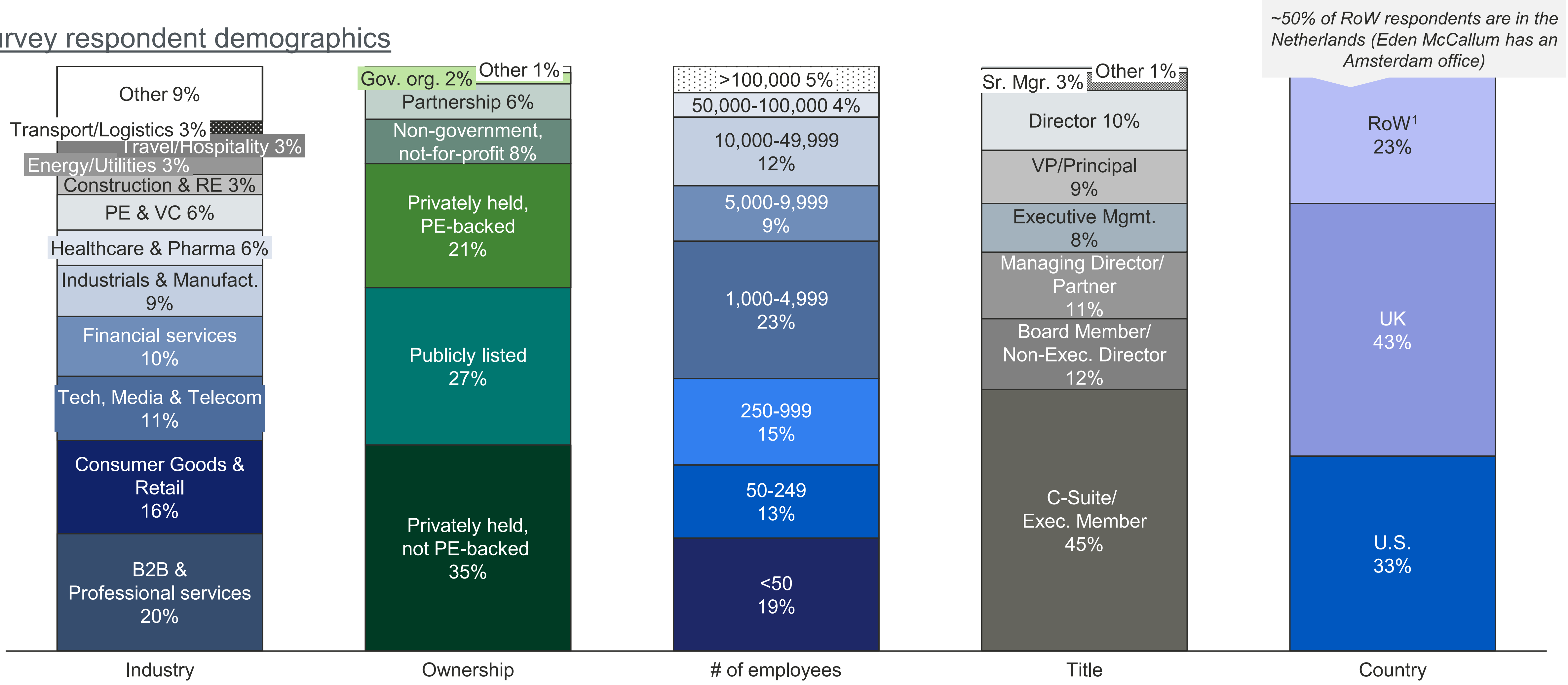
We surveyed 264 business leaders across a broad range of industries within companies of varying sizes and ownership models

Survey respondent demographics



n: 264; RoW n of participants includes Switzerland: 6, France: 4, Germany: 4, Canada: 3, Ireland: 2, Czech Republic: 1, Italy: 1, Norway: 1, Spain: 1, Turkey: 1, Australia: 1, Bahrain: 1, British Virgin Islands: 1, India: 1, UAE: 1

Notes: 1) Other includes Primary industries (mining, forestry, agriculture, etc) 1%; Public sector/social sector/NGO 2%

Source: HPA Business Outlook Survey Q2 '26: Q1 - Which industry is your company / organization in?; Q4 - How would you best describe your organization? Please select one.; Q2 - How many people does your company / organization employ in total?

The U.S. sample skewed more heavily towards B2C, while the majority of RoW respondents work at B2B companies

Key facts about the survey respondent sample

	INDUSTRY FOCUS		OWNERSHIP STRUCTURE				COMPANY SIZE (FTES)		
	B2B	B2C	Publicly listed	Privately held	Partnership	Gov or NGO	0-249	250-4,999	5,000+
U.S.	38%	62%	31%	57%	6%	7%	30%	36%	34%
UK	53%	47%	24%	62%	7%	7%	36%	41%	23%
RoW	70%	30%	31%	51%	5%	13%	29%	36%	36%

n: 264
Note: B2B and B2C split excludes those who answered ‘Other’ for Industry focus (1 in the U.S., 11 in UK, and 5 in RoW); Ownership structure split excludes those who answered ‘Other’ for ownership structure (1 in UK, 2 in RoW). Numbers may not add to 100% due to rounding
Source: HPA Business Outlook Survey: Q1 - Which industry is your company / organization in?; Q4 - How would you best describe your organization? Please select one.; Q2 - How many people does your company / organization employ in total?; Q3 – In which country do you live?