FOCALDATA WORKFORCE AI TRACKER: WAVE 1

IN PARTNERSHIP WITH THE FINANCIAL TIMES

Two-Tier Transformation

How AI is Changing Work in the UK and US

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Rapid advances in artificial intelligence are beginning to fundamentally transform the world of work, and with widespread public interest in its effects, the need for an independent, ongoing measurement instrument is greater than ever.

This white paper covers the first set of data in a new workforce AI tracker produced by Focaldata in partnership with the Financial Times. The tracker will be run monthly across the United Kingdom and United States, covering overall AI usage, how workers are using AI, the tools they are using, perceived productivity gains, barriers to usage, and impacts on the labour market.

Our results from the first wave, conducted across February and March, confirm that the AI revolution is still very much in its infancy. While almost two-thirds of workers (**65%**) in the UK and US have used AI at least once in their job, daily use is concentrated in a narrow band of demographics. Fewer than 1-in-5 workers are using AI tools daily, and around half use AI less than once per month, if ever.

The remarkable developments in AI technology, when paired with a relatively slim set of frequent users, risk opening up a two-tier economy in the labour market, in which some sectors and roles see large productivity gains while others continue along the sluggish growth path which has plagued the West in recent decades. There is some evidence of this two-tier system already emerging, with AI usage currently highest among those in senior positions and on higher salaries.

While previous waves of automation reshaped blue-collar jobs in factories and warehouses, this one is reshaping offices and consultancies. Tasks people are using AI most frequently for, such as conducting research and editing content, are some of the core activities of professional services. We find evidence in our data that junior roles in professional services – namely the consultancy, finance and legal sectors – may be at acute risk from automation.

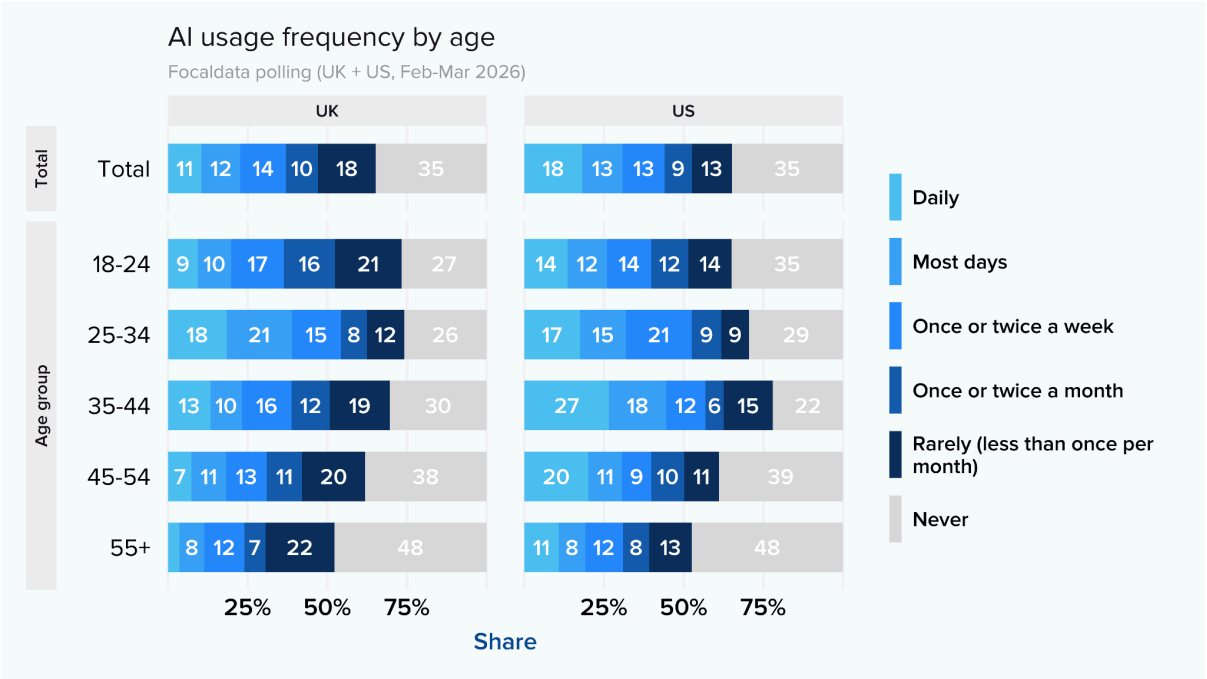
Whether widespread AI use leads to augmentation in the labour market or direct job replacement remains to be seen, and current managerial expectations vary significantly across countries. In the UK, a quarter (25%) of managers think AI will lead to reductions in their staff numbers over the next year, while only 16% expect an increase in headcount. In the US, however, the opposite is true, with 28% expecting an increase and 22% a reduction. This disparity between countries is not attributable to industry differences alone.

Understanding the drivers of AI use across different industries and how these new technologies are going to impact the future of work are essential data points for business leaders, policy makers and workers themselves. We hope this white paper and ongoing tracker can contribute to the process of

bridging the knowledge gap. Future reports from this tracker will explore particular topics in depth, but this white paper is designed to provide a broad overview of the current state of play.

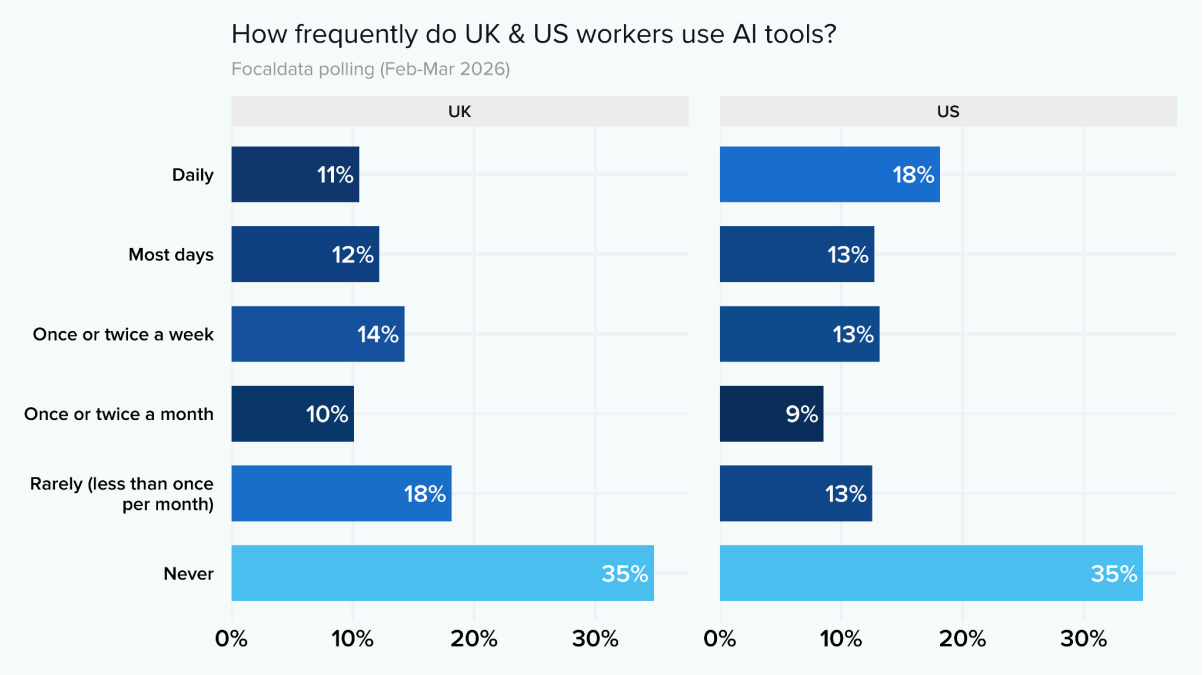
The base of the AI adoption curve

Despite significant advances in AI capabilities in recent years, **fewer than 1-in-5** workers across the UK and US currently say they use AI tools on a daily basis, in contrast with half of the workforce who uses them rarely, if ever. Across both countries, AI users skew younger, though those in the United States more closely match the age profile of the workforce at large.



From these responses, we can conclude that on any given workday, only about a quarter (**24%**) of UK employees are using any AI tools, the vast majority of whom are frequent AI users.[1] In the US, uptake has been slightly faster, with an estimated **32%** of workers using AI on any given day. The gap is mainly driven by differentials among older workers. In both countries, though, AI usage in the workplace remains a minority activity.

[1] Calculated as 100% of daily users, plus 80% of 'most days', 30% of 'once or twice a week' etc.



As of early 2026, AI adoption does not appear to follow a smooth curve from non-users to heavy users. Instead, the distribution is more 'L-shaped', with a large block of workers on one side who seldom (if ever) use AI tools, and the remaining share split equally between moderate and intense users.

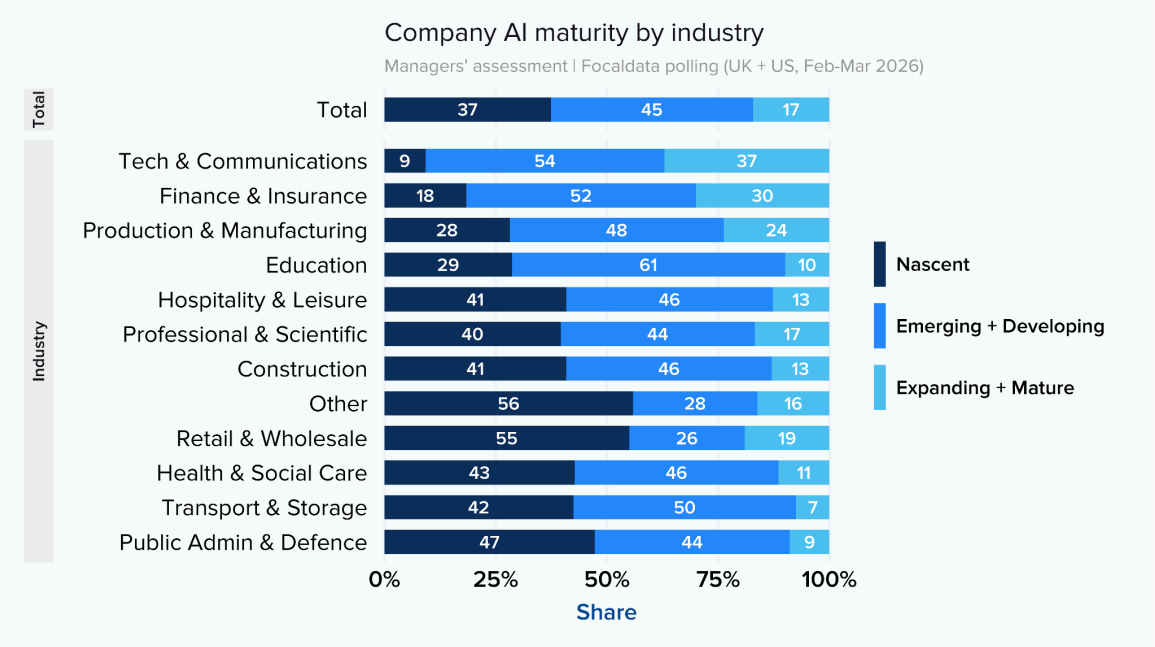
Many have speculated about long-term productivity gains from the deployment of AI tools in the workplace and post-scarcity visions of the future of work (and human existence itself). As a consequence of the above distribution, in the short term at least, large productivity gains are likely to be highly concentrated in small sections of the economy.

Productivity gains are likely to be concentrated (for now)

At the company level, most are still in the early stages of AI adoption. When asked to rate their organisation's AI maturity using a framework borrowed from a recent McKinsey study, the majority of managers describe their organisation as 'Nascent' or 'Emerging' (**33%** and **24%**, respectively), with only a small proportion rating their company as 'Expanding' or 'Mature' (**15%** and **5%**).[2]

[2] Respondents are presented with a full description of each term, e.g. 'Nascent: Minimal or no AI initiatives; some staff use AI but no real impact on the overall business and ways of working'.

The distribution of maturity is not uniform across company sizes or industries. Large organisations, particularly in the technology and professional services sectors, are disproportionately likely to report higher AI maturity levels, amplifying the concentration of productivity gains we document throughout this paper. More than **90%** of tech firms, for example, have progressed past the nascent phase, compared to a minority (**45%**) of those in retail and wholesale.



Based on workers' own perceptions of time savings, our data implies an overall current productivity gain from AI tools of approximately **3.5%** across the labour market. We calculated this by converting estimated time savings into productivity increases (e.g. 'several hours per week' becomes an estimated 10% of working hours saved, which converts to an ∽11% productivity increase). This 3.5% figure should be understood as a baseline rather than a ceiling. As the adoption curve steepens, these aggregate figures may rise materially.

Again, the tech industry is leading the way. Workers in technology and communications, of whom two-thirds will use AI tools on an average day, record an average productivity increase of **7.8%**, more than double the workforce average.

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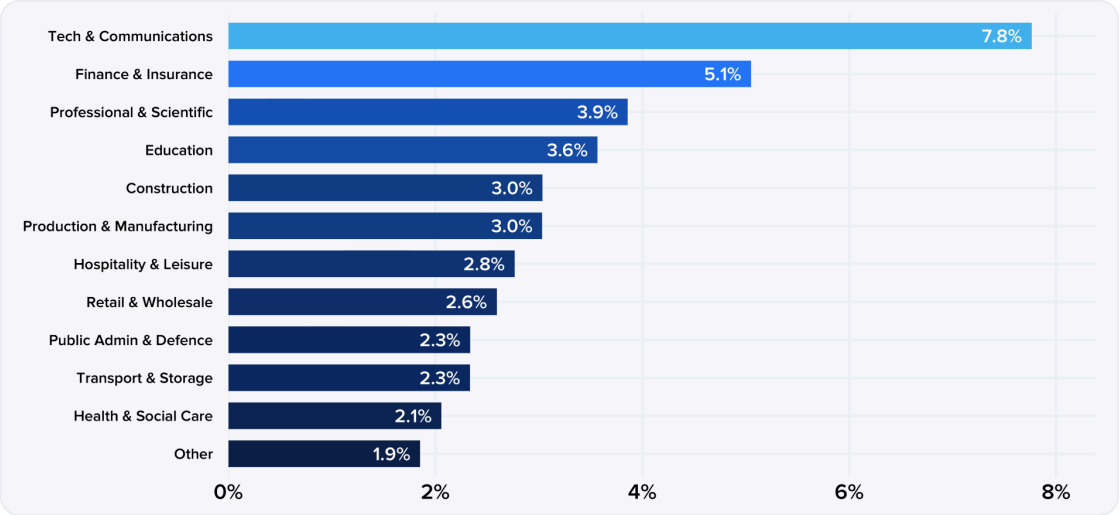
The tech industry is achieving biggest productivity gains

IMPLIED AI PRODUCTIVITY GAINS BY INDUSTRY



Weighted average of UK & US responses. UK fieldwork 26 February - 2 March 2026, n = 2,365. US fieldwork 6-9 March 2026, n = 1,754. Productivity gains derived through estimated time savings (e.g. 'several hours per week' estimated at 10% of working hours saved → 11% productivity gain).

The wage premium

Those on higher wages and more senior positions are racing ahead in AI usage. We see a very large AI adoption curve by salary band, with **fewer than 20%** of workers on a below-average salary using AI tools on an average day, compared to a clear majority (**63%**) of those in the highest salary band, representing the top 10% of earners.

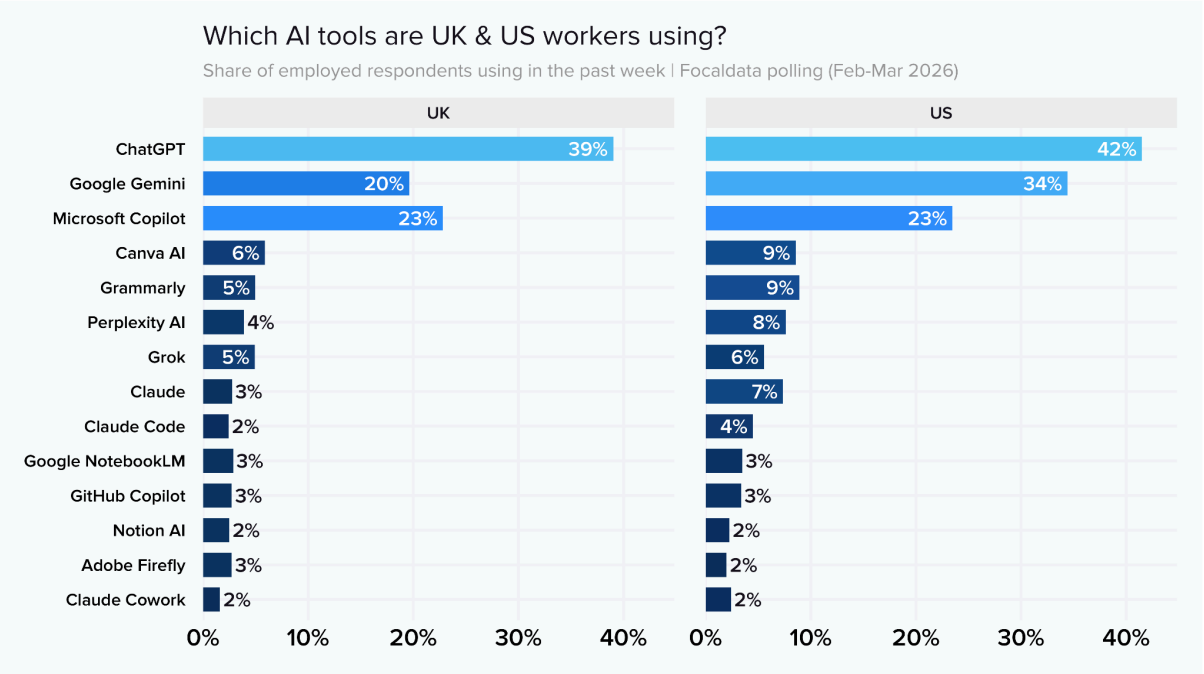
We can argue about the causality here, and whether being on a higher salary makes someone more likely to use AI, or whether using AI is itself beginning to drive higher salaries. This is a question our tracker is designed to answer, and in the next wave we will be looking at recent promotions as a way of beginning to unpick this relationship. The existing research, though, indicates that the latter logic is true. PwC's 2025 AI Jobs Barometer estimated a 56% wage premium attached to jobs that require AI skills (up from 25% in 2024), suggesting the earnings gap linked to AI proficiency may be widening faster than anticipated.


Daily AI use by salary band
Focaldata polling (UK + US, Feb-Mar 2026)
Share using AI on average day
60%
40%
20%
0%
17
16
20
31
42
63
1: Lowest
2
3
4
5
6: Highest
Salary band

The AI tools market remains highly concentrated

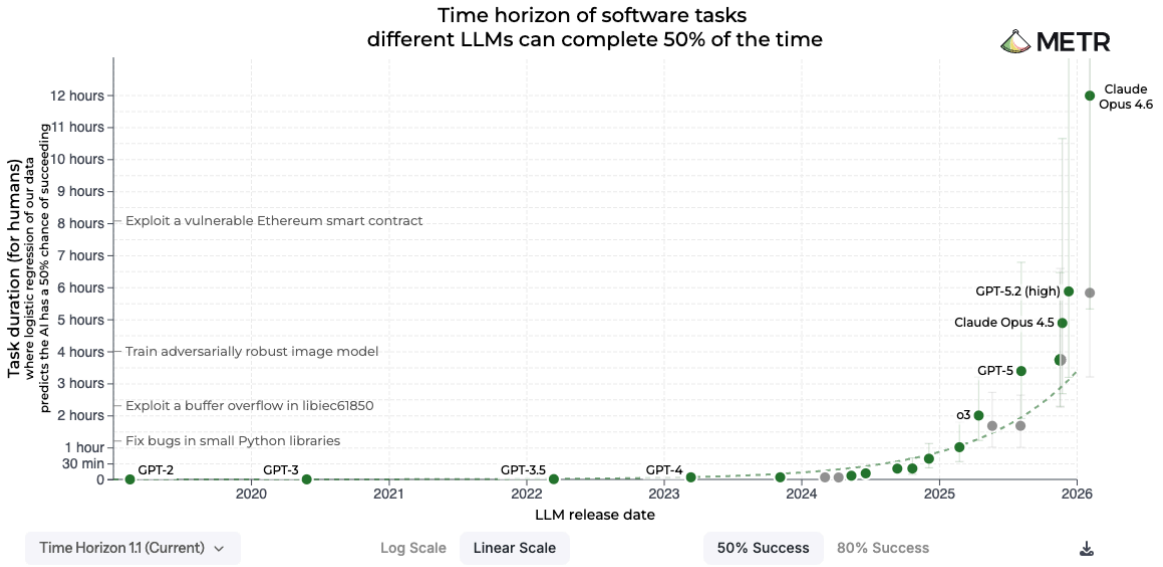
OpenAI's ChatGPT dominates usage statistics across both countries. **Two-in-five** employed respondents had used the tool in the seven days prior to taking our survey. ChatGPT is the primary tool in a dominant 'Big Three', rounded out by Google Gemini and Microsoft Copilot (the latter also powered by OpenAI's underlying models).

The degree of market concentration is significant. ChatGPT is the default tool for many casual AI users, reflected in its higher market share with those who use AI tools infrequently.

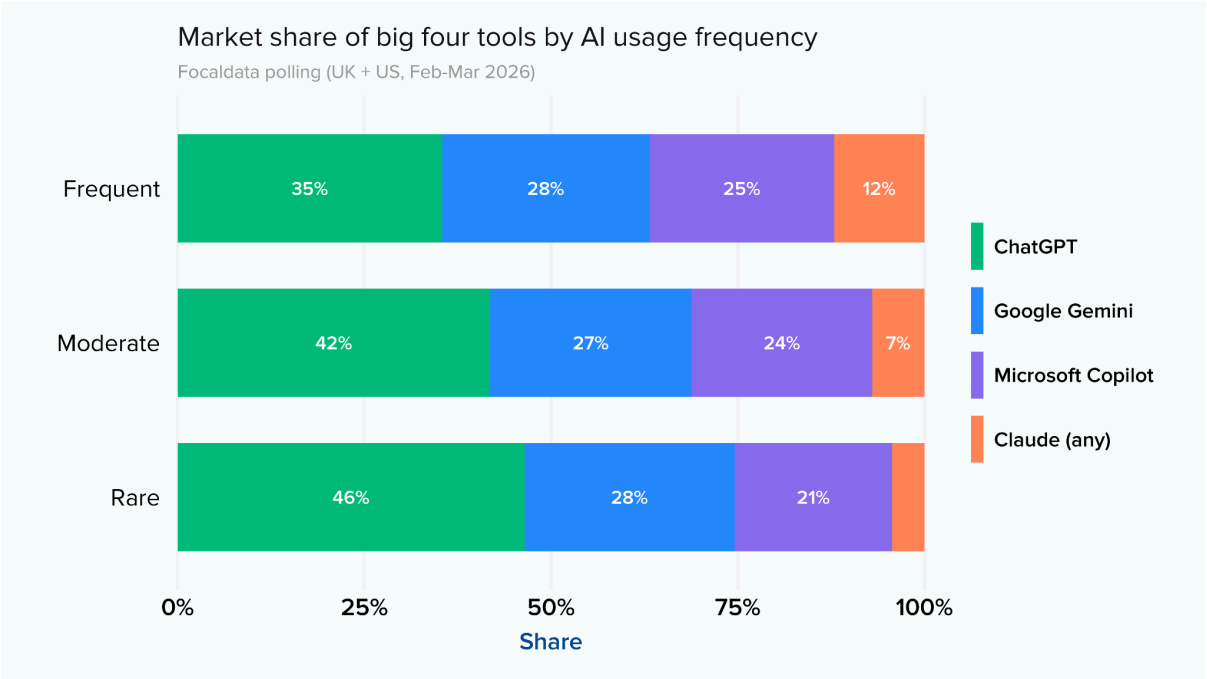


The uptake of the OpenAI software has been remarkably quick, and ChatGPT usage alone far outpaces top-down company implementation of AI tools. Only **22%** of workers say their company has a workplace AI policy, the same share who say their company has a paid subscription to *any* AI tools. Breaking things down, we find that **two-thirds** of workplace ChatGPT users are using the tool without a company AI policy, and over **60%** of its users are at companies which do not have paid subscriptions to any AI tools (which typically afford greater data privacy protections).

Despite the impressive strides made by Claude's latest Opus models (4.6 and 4.7), released in February and April 2026, respectively, and the LLM's dedicated fanbase, Claude remains a niche tool overall and ranks well below its rivals.



Only the most frequent daily AI users are using Claude tools in any significant numbers, though even then, a **12%** market share when grouped with the 'Big Three' still sees it ranking well below the others. We will track whether this concentration begins to drip down to more casual users over the coming months.



Training is the top (and most neglected) lever for uptake

A question many companies are reckoning with is how to increase AI uptake among staff. While we have touched upon salary differences above, a regression analysis reveals that the differences in adoption seemingly attributable to salary disappear when we control for other variables. In practice, just four main drivers lie behind a worker's level of AI use: age, seniority, industry, and training levels.

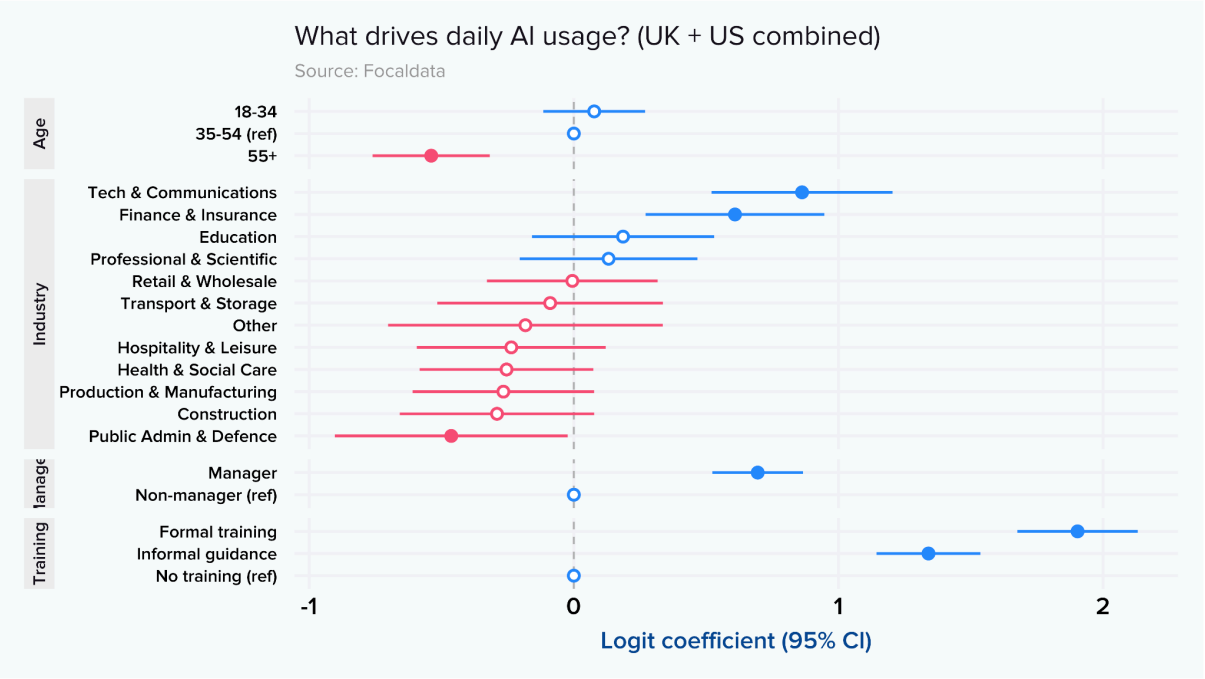
Across both countries we surveyed, 18 to 34 year-olds are about **9 percentage points** more likely to use AI on a given day than 55+ year-olds in equivalent roles. On seniority and industry, managers are about **11 points** more likely than non-managers of the same age at the same company, and a 40-year-old manager working in tech and communications is **20 points** more likely to be using AI than a 40-year-old manager working in construction.

The largest overall driver, though, is training levels, where the differences are stark. A company which has delivered formal training on using AI tools sees a **37-point** increase in the number of staff using them on any given workday, compared to an identical company which has not delivered any training. Even companies which have only issued informal guidance see a **24-point** uplift.

Among workers who rarely or never use AI, the most commonly cited barriers are not ideological. **Fewer than 1-in-5** workers who do not use AI at work are driven by general personal opposition to the technology, and there is less outright hostility than we had expected internally prior to running the research. Only **a quarter** of workers place their personal view of AI at 3 or below on a scale between 0 and 10, though we will keenly monitor how this evolves in the context of potential job displacement.

The top barriers for workers centre on training and a belief that AI cannot help with their specific roles. Change needs to start from the top, and companies that want to increase their staff's AI uptake should begin by issuing formal training as soon as is feasible.

In practice, very few employers have acted on this so far. Only **14%** of workers say they have been given formal training on AI from their employer, and a further **21%** have been issued with informal guidance. Taken together, that means around two-thirds of those in employment have not received any training from their employer on how to use AI.



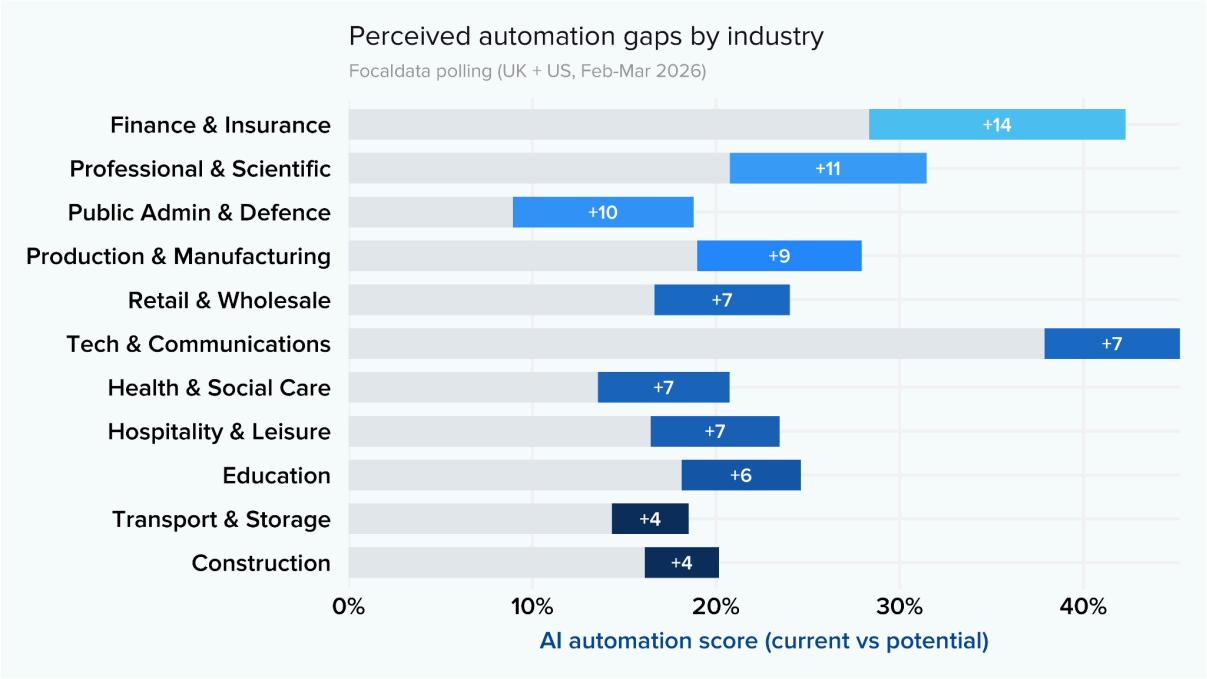
The training gap poses a serious risk for both workers and companies alike in this new labour landscape, and may create a self-reinforcing cycle of AI disparities. Workers in low-adoption companies and industries could receive less training, fall further behind, and become increasingly unable to close the gap, leaving a minority of workers and employers to reap large productivity rewards.

Professional services roles are at acute risk

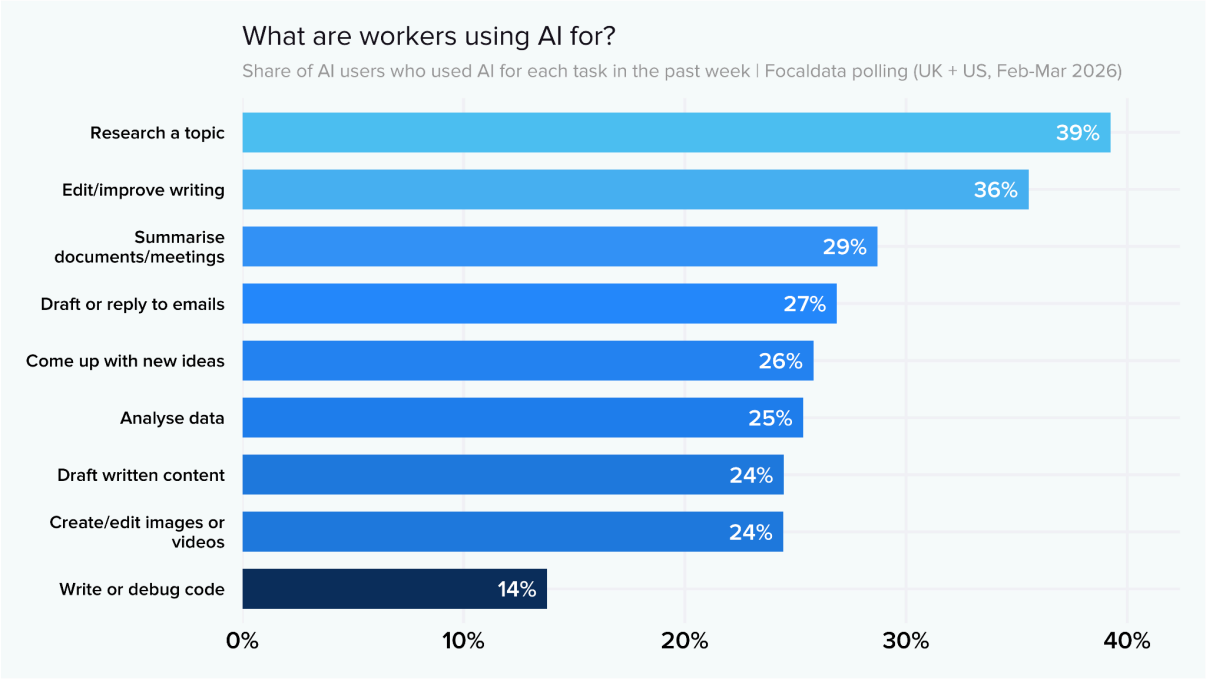
The professional services sector — which includes technology, finance, and our 'Professional & Scientific' group — deserves particular attention. These industries account for a disproportionate share of UK economic output relative to the number of people they employ, and have historically been successful through the expertise of their workforce.

A UK government paper published in 2023 estimated that 'management consultants and business analysts' would be the single most exposed occupation to AI applications, with legal professionals and three finance roles all appearing inside the top 10. We covered this in a June 2025 piece of research, and the survey data we have gathered so far this year appears to bear this prediction out. That these industries are among those where AI adoption is highest raises the existential question of what happens to the value of professional expertise when much of it can be successfully automated.

One of the more interesting data points in the tracker is not how much AI workers are using, but how much more they think they *could* be using, i.e. the gap between current and (perceived) potential usage. When we asked workers to assess their current level of AI automation and the potential level their role could support (based on their understanding of current AI capabilities), Finance & Insurance workers reported the largest automation gap of any sector, with a **14-point** differential. Professional & Scientific services came in second at an **11-point** gap. These are two sectors which, in workers' own estimations, are in the early stages of a much more fundamental shift.



The idea that we will see widespread redundancies for senior lawyers and consultants is not currently well supported by the evidence we see in our research or elsewhere. However, the further down the ladder we go, the more at risk a job role becomes. The tasks that AI performs best at in professional services are typically junior rather than senior tasks. Conducting research and editing written content, which are the two most common AI use cases in our tracker data, map onto the work that graduates entering the consultancy, law, and finance sectors have typically been hired to do.



Jobs data suggest this shift is already taking place. Indeed hiring data from September found that between August 2024 and August 2025, the number of junior roles advertised on the site fell by 7%, while senior roles climbed by 4%. The emerging shape of the labour market looks more like a diamond, with a bloated middle as junior roles are hollowed out, a replacement for the traditional pyramid structure.

Our data on the relationship between job tenure and AI adoption highlights this dynamic. Contrary to the intuition that the newest, youngest workers would be AI's most enthusiastic adopters, our data suggests that AI use is highest among workers who have already been in their role for a few years already, rather than among those who are entirely new.

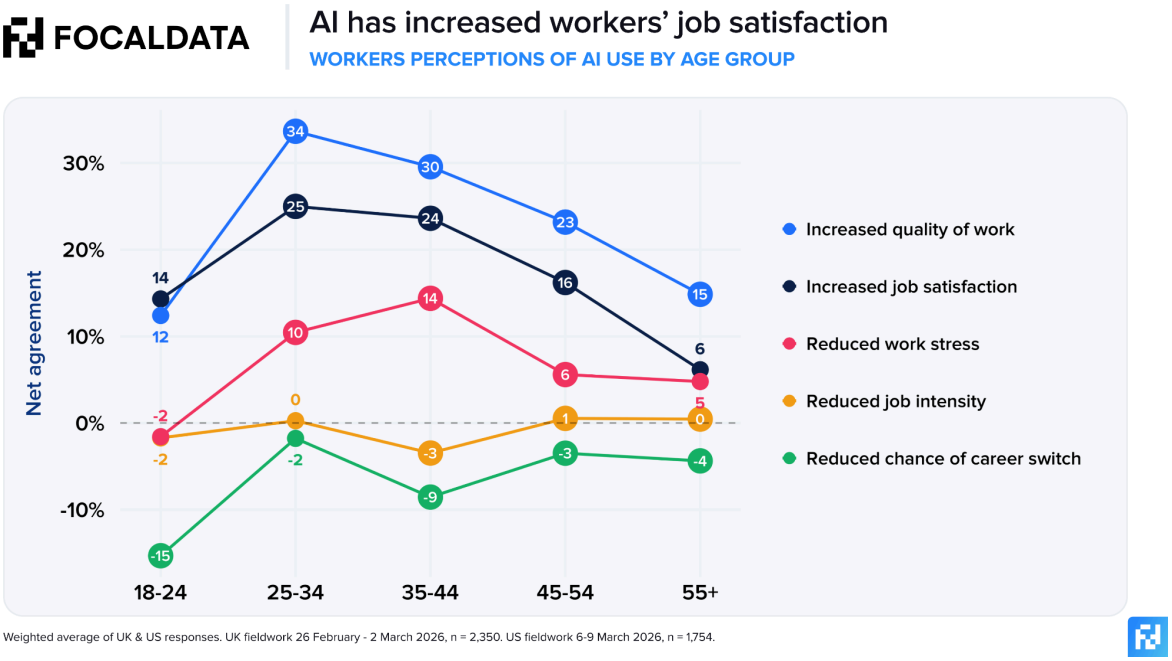
Even after controlling for age, we see that AI usage is highest among those who have been in their current role between 2 and 10 years, significantly higher than those who joined in the previous 12 months. What we may see in the short-term is an AI-native middle beginning to automate away most of the junior role.

Satisfied today, but pessimistic about tomorrow?

The honeymoon period

Among workers who currently use AI tools, satisfaction levels are fairly high. Across both countries, **30%** of workers say AI has increased the quality of their work (only **7%** say it has been reduced), and **26%** say it has made their job more satisfying, versus **9%** who say the opposite. The prevailing sentiment today among workers is one of enthusiasm. AI is saving time and in many cases making jobs more interesting by freeing people from repetitive tasks.

On a net basis, though, people still think AI tools will make them more likely to switch careers in the future, suggesting workers themselves are already conscious of the potential transformations in the labour market.

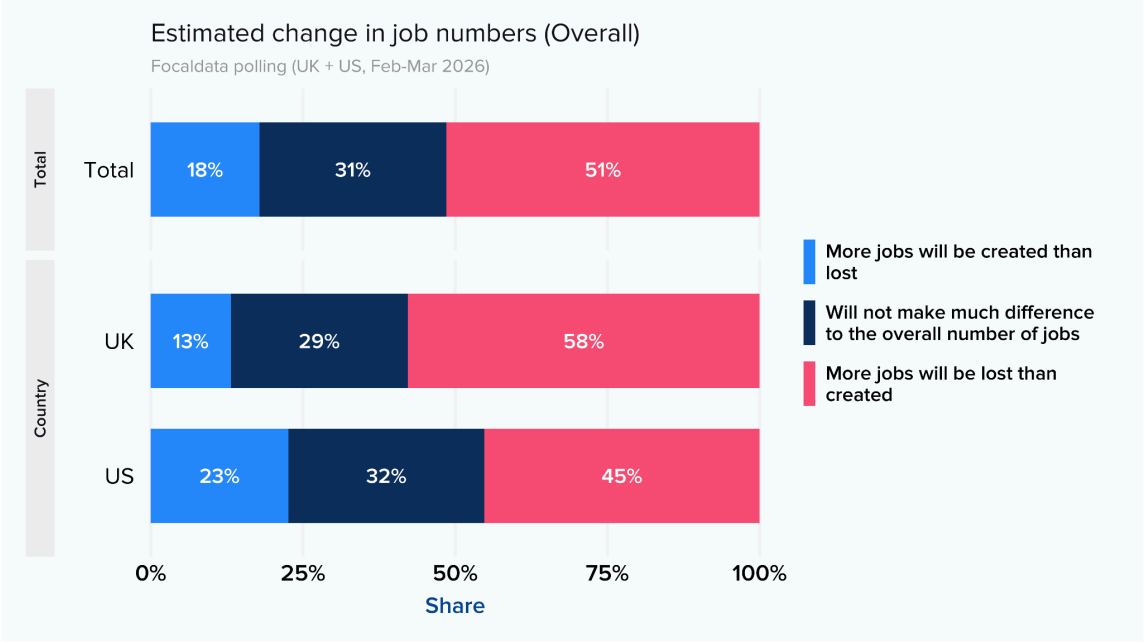


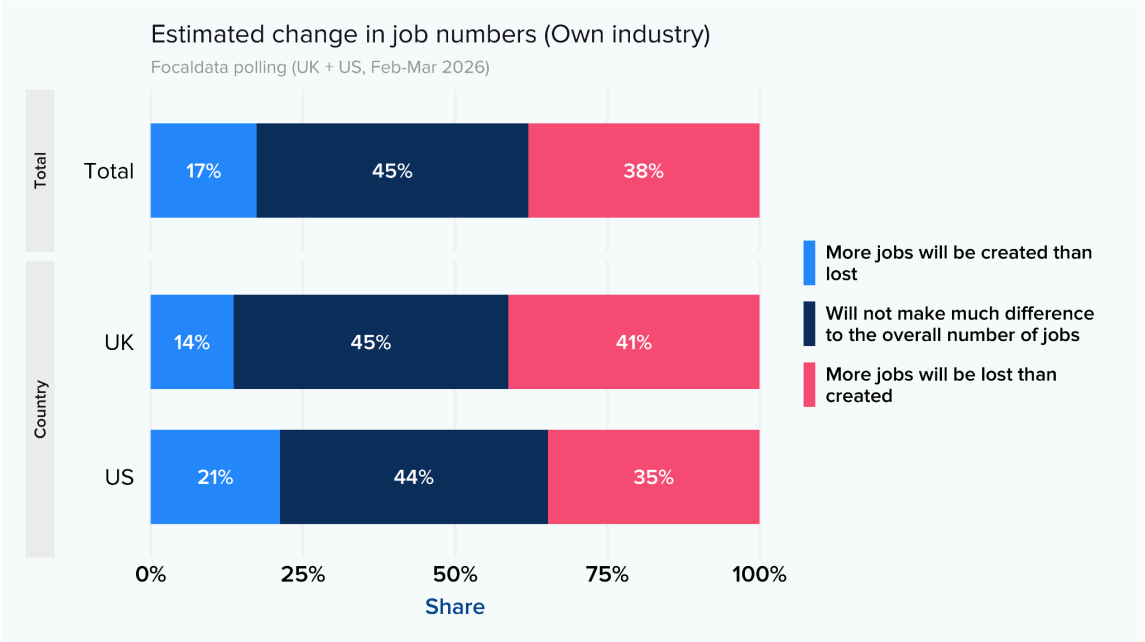
Collective pessimism

Despite this personal satisfaction, workers hold significantly more pessimistic views about AI's impact on the broader labour market. There is a sharp and consistent gap between how workers feel about AI's effects on their own work versus its effects on employment more generally.

A majority of workers (**52%**) believe AI will reduce total employment in the economy over the next five to ten years, but typically think the effects will be lower in their own industry. **38%** think AI will

reduce the number of jobs in their industry, with the plurality (**44%**) saying there will not be much difference to overall job numbers.

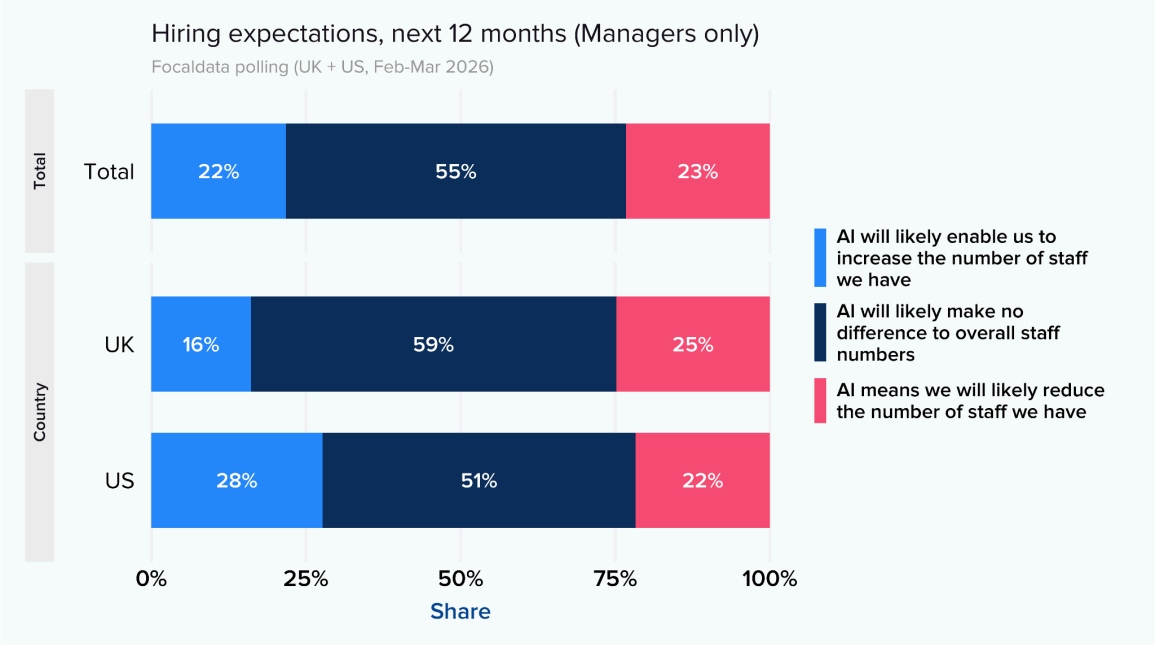




Concern is notably higher in the UK than the US, consistent with the divergence in managerial expectations documented in the next section.

UK managers expect a contraction, but US managers expect growth

One of the most interesting divergences in the data is between how UK and US managers are thinking about the future shape of their workforces. In the UK, **a quarter** of managers expect AI to lead to a reduction in headcount over the next 12 months, compared to just **16%** who expect an increase. In the US, the picture is reversed, with **28%** of managers expecting an increase in headcount and only **22%** expecting a reduction.



One explanation for this can be found in an IMF paper from 2024, which estimated that approximately 70% of the UK workforce is in high-exposure jobs, compared to approximately 60% in the US and other advanced economies, reflecting the UK's large service sector relative to the size of its economy. However, even after controlling for industry, UK managers are more pessimistic about the next 12 months than their US counterparts, suggesting industry alone does not explain the disparity.

Furthermore, while the exposure-to-outcomes relationship holds at the country level, it is not found at the industry level. It might be assumed that industries with the highest theoretical AI exposure would be the first to make job cuts, but our data complicates that prediction. In fact, managers in tech and communications firms – i.e. working in sectors with the highest AI adoption rates – are the most likely to expect to increase their headcount over the next 12 months, with a net score of **+18**. The finance and insurance sector, which ranks second in usage, is also second in hiring prospects with a net score of **+6**.

Across the board, the more a sector uses AI, the more likely managers are to expect hiring to increase over the next 12 months. We want to be cautious about this finding given the small sample sizes by industry and that we are only in wave one of the tracker, but the data we have collected so far somewhat complicates the received wisdom on white collar job losses. In the near term, at least, AI is seemingly functioning as a growth enabler for high-use sectors rather than as an immediate threat to jobs.

What comes next?

Our tracker is in its first wave, and more data will allow us to make more robust estimates, while also tracking the evolution of workers' relationships with AI over time. However, the current research, both from our own surveys and other independent research we have referenced throughout this white paper, is sufficient to illuminate three potential short-term scenarios for how AI is going to reshape the UK and US labour markets over the next couple of years: the 'ABC' of outcomes, if you like.

Scenario A: Augmentation

In this scenario, AI adoption continues to accelerate across all sectors of the economy, driven primarily by a significant growth in employer training budgets. The dominant effect here would be the augmentation of labour through increased worker capabilities rather than direct job replacement.

Workers in white collar jobs would use AI to do more and better work, increasing national productivity levels in the process. Total employment would hold steady or grow, and productivity gains would be distributed broadly enough across the economy to raise living standards across the piece.

For this scenario to manifest, employers must dramatically increase the amount of formal AI training given to employees, and the small minority of workers who have received formal training would need to rise to a majority in the near future. Many employers already talk about the skills gap being one of the biggest obstacles to growth, and the data we have collected supports that, but strong AI-driven growth will require investment in upskilling staff. The technology and communications industries, which see the highest levels of AI use, have achieved the highest levels of productivity growth and are expecting to increase their headcount over the next 12 months – an illustration of successful augmentation in practice.

Scenario B: Bifurcation (most likely near-term outcome)

In this scenario, which is most strongly supported by the data we have collected so far, AI adoption continues to accelerate but remains uneven. The training gap would widen rather than close, and potentially create a large divide between AI-native workers (typically in senior positions, highly-paid roles and high-use sectors) and an AI-excluded population (in junior roles, on lower pay and in low-use sectors).

Aggregate productivity levels would still grow, but the overall productivity increase would mask the disparities below the surface. Professional services firms would see a long-term decline in hiring for junior and entry-level roles, while retaining the mid-level staff who can successfully manage the transition to AI. Younger workers would be entering the workforce in a tricky environment, and find fewer opportunities in the roles that might once have served as the first step onto the jobs ladder. Higher competition would mean lower levels of pay growth in these junior roles, which is backed up by the current evidence. Recent FT analysis found that salaries for software engineering positions are now 'almost 15 per cent higher in real terms than on the eve of ChatGPT's launch, while pay at the bottom has only crept up by around 5 per cent'.

Scenario C: Crash

In this scenario, AI capabilities advance much faster than companies' ability to create new roles or business models, resulting in widespread job displacement rather than automation.

For this scenario to materialise in the near-term, our data suggests it would require a continued acceleration in AI capabilities and a widespread shift in corporate strategy towards automation rather than augmentation, which would soon be picked up in the data by managerial hiring expectations over the next 12 months.

One of the major risks for employers here is that fast adoption of AI which results in significant job losses could well see a large anti-AI political cleavage emerge in response, which could then have significant implications on governmental AI policies. We are already seeing the seeds of this rupture emerge in the US, and will in all likelihood overlap fairly neatly with the existing populist axis which has transformed Western politics in recent decades.

Some AI companies have, understandably, made bold claims about AI's capacity to replace millions of jobs in short timeframes, but in our data at least, the link between AI adoption and large-scale displacement has yet to be established.

The first wave of our AI Workforce Tracker paints a picture of a technological transformation still in its infancy, but nonetheless transforming some corners of the economy while leaving others mostly untouched for the time being.

An 'L-shaped' adoption curve, steep salary gradients, and the concentration of productivity gains in a narrow band of sectors, all point to the same conclusion, that we are in the early stages of a revolution which is a lot more uneven than simple headline numbers suggest.

Three key findings from this wave deserve particular attention from business leaders and policymakers alike:

- Formal training is the single most powerful tool for increasing AI adoption, producing a **37-point** uplift in daily AI usage for an average company, yet only **14%** of employees have received formal training. The vast majority of workers are somewhat flying blind in their AI usage, which raises further concerns about data privacy.
- The UK and US are on diverging trajectories, a gap explained partially by the makeup of the two economies, with the UK's more service-based economy more at risk from AI-led automation. Differences are not fully explainable by industry, though, suggesting a more structural pessimism among UK managers.
- We are most likely on a pathway towards bifurcation in the near term, in which the divide between high and low adoption roles and sectors continues to accelerate, with concentrated productivity gains and cuts to some junior-level positions.

For the most part, workers are navigating an AI honeymoon period with an awareness that their positivity may not last. Personal satisfaction with AI tools and their impacts on productivity sit alongside a wider anxiety about what AI means for the labour market as a whole.

Subsequent waves of this tracker will enable us to move beyond baseline descriptions into more forward-looking estimations, quantifying the pace of change, tracking the training gap, and building

a long-term picture of how the labour market is evolving month-by-month through one of the most profound changes to work, and society generally, in decades.

UK fieldwork for wave 1 of our Workforce AI Tracker was conducted between 26 February and 2 March 2026 with a sample size of 2,365 respondents, with US fieldwork conducted between 6 and 9 March 2026 with a sample size of 1,754 respondents. Data was weighted to be nationally representative in both countries, with data weighted by age group, gender, ethnicity, education level, geographic region, political interest and past election vote(s). Combined data referenced in this paper was reweighted to ensure a 50% overall sample share for each country.

If you have any questions about methodology or anything else in this white paper, please contact ***patrick@focaldata.com****.*