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EXECUTIVE PERSPECTIVE

AI's Returns Are Concentrating, Not Spreading

Nearly every company is spending on AI. Very few are capturing the value. The gap between the two groups is the actual story.

74%

Of AI's economic value is being captured by just 20 percent of companies deploying it

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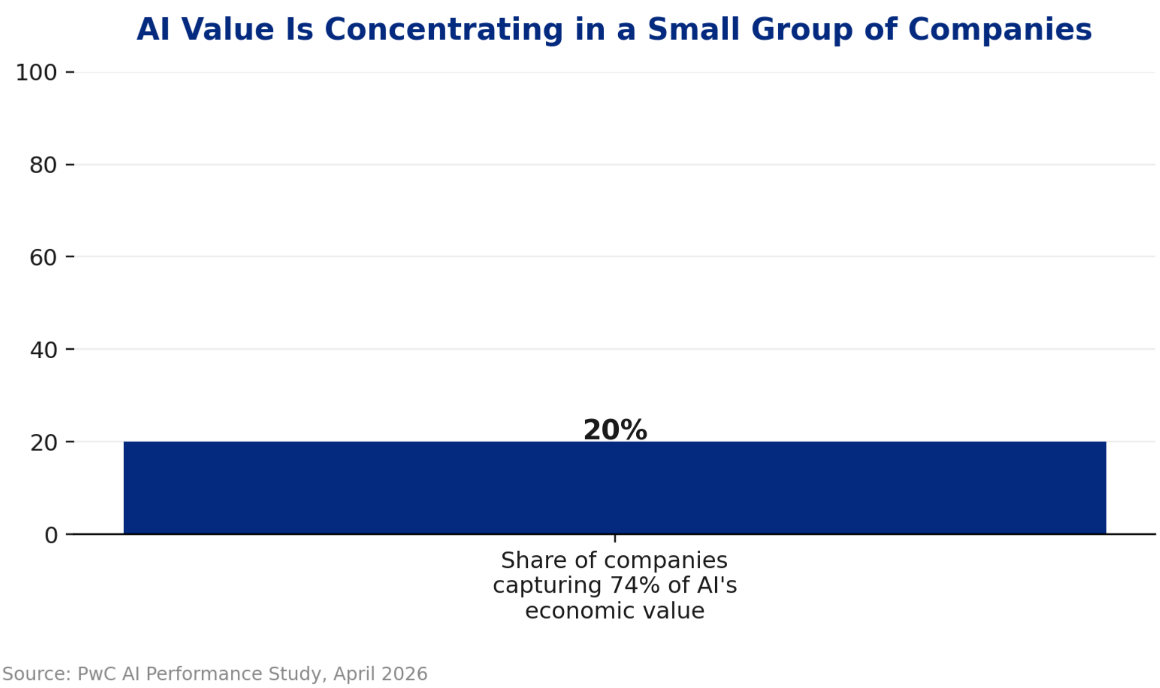
Deployment Is Nearly Universal. Value Capture Is Not.

AI deployment inside large organizations has become close to universal. The gap that actually separates competitors now is not whether they deployed AI, almost everyone has, but whether they are capturing meaningful economic value from it. PwC's April 2026 AI Performance Study found that 74 percent of AI's economic value is being captured by just 20 percent of the companies deploying it. Deployment and payoff have become two very different stories.



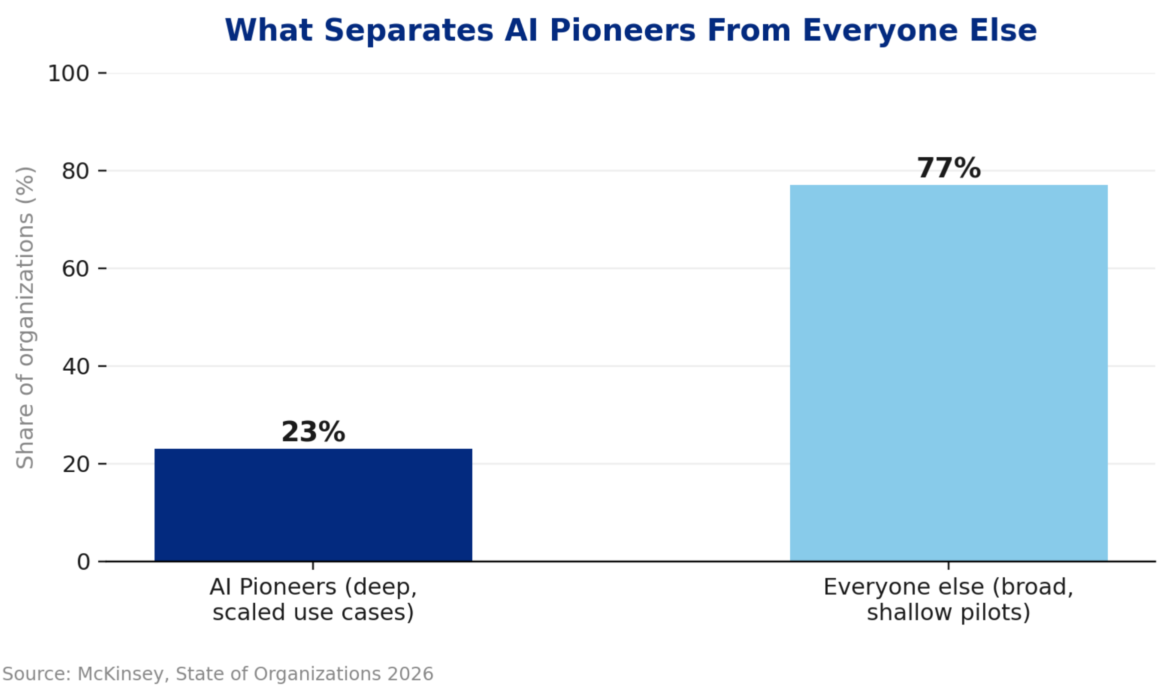
AI economic value is highly concentrated among a small share of deploying companies.

What Separates the Top 20 Percent

The distinguishing factor is rarely which tools a company licensed. McKinsey's "State of Organizations 2026" research found only 23 percent of organizations qualify as AI Pioneers, meaning they are actively deploying AI across most departments and functions with a clear understanding of how it will reshape the work itself, rather than running isolated pilots that never scale. The majority are still experimenting in ways that generate activity without generating enterprise-wide impact.

The Numbers at a Glance

Metric	Figure	Source
Share of AI's economic value captured by top 20% of companies	74%	PwC AI Performance Study, April 2026
Organizations qualifying as "AI Pioneers"	23%	McKinsey, State of Organizations 2026
Organizations using AI in at least one business function	88%	Aon AI Risk research, 2026
Of those, with a comprehensive AI governance framework	8%	Economist Impact research, cited 2026



Only a small minority of organizations have scaled AI deeply enough to qualify as pioneers.

Why Piloting Everywhere Is Not the Same as Scaling Anywhere

A common pattern inside the majority group is breadth without depth: dozens of pilots launched across departments, few of them ever reaching the scale where they change how work actually gets done. That pattern feels like progress internally, activity is visible, budgets are spent, executives can point to initiatives, while producing little of the concentrated value the top quintile is capturing by going deep on fewer, better chosen use cases tied directly to how the organization creates value.

Two Different Jobs to Do

For the CEO

Audit whether your AI portfolio looks like the pioneers, a small number of deep, fully scaled use cases tied to core value drivers, or like the majority, a wide spread of shallow pilots. Breadth of activity is not evidence of impact.

For the CHRO

The organizational capability gap between pioneers and everyone else is rarely a technology gap. It is a change management and workforce capability gap, the ability to actually redesign how roles and workflows function around the tool rather than bolting the tool onto an unchanged process.

The Question That Actually Matters

The relevant question is no longer whether your organization has deployed AI. Almost everyone has. The relevant question is whether you can name the specific, scaled use cases actually producing measurable value, or whether your AI story is still, honestly, a portfolio of pilots waiting to prove themselves.

References

1. PwC, "AI Performance Study," April 2026.
2. McKinsey & Company, "State of Organizations 2026."
3. Aon, "AI Risk 2026: What Business Leaders Need to Know."
4. Economist Impact, AI governance framework research, cited in AI governance statistics compilations, 2026.