

Business Leaders Survey: AI and the Workforce

Q2 2026



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Executive Summary

OVERVIEW

- Eden McCallum's semi-annual Economic and Business Outlook Survey was conducted from 17 to 24 April 2026 in conjunction with HighPoint Associates
- We surveyed nearly 300 business leaders from across the globe, with a focus on the UK, Netherlands and the US (Eden McCallum's and HighPoint's offices)
- Our sample respondents work across a broad range of industries, and within companies of varying sizes and ownership models

OVERALL RESULTS

- Optimising data/AI is a top 3 priority for over half of organisations, and AI is having an impact in multiple ways across workforces. >50% are encouraging staff to experiment, identifying/sharing use cases and providing training, and a significant number (>20%) are taking further action (including replacing/planning to replace some human roles with an agentic workforce and reducing/planning to reduce staff numbers)
- 80% of respondents are using an agentic workforce alongside their human workforce with half of those Somewhat/Significantly
- Two-thirds are expecting AI to have an impact on the overall size of their workforce; 24% are expecting a decrease
- This year, 26% of organisations are reducing their recruitment plans because of AI (c. 40% expect to recruit the same numbers and 30% are not yet sure). For those reducing recruitment this year, most are expecting a reduction of 1-10%, and the impact is expected mostly at entry/junior level and in customer service and administrative support roles.

RESULTS BY GEOGRAPHY

- The picture is generally similar across geographies with some minor variations:
 - The use of an agentic workforce is strongest in the US (47% Somewhat/Significantly)
 - While leaders in NL are more likely to be expecting a smaller workforce in the future due to AI, the US is most likely to see reduced recruitment this year

VARIANCES BY COMPANY TYPE

- TMT is taking the most action with AI in the workforce alongside Financial/Professional Services in some areas, with Heavy Industries and (to a slightly lesser degree) Consumer/Retail less so
- Small organisations are more likely to be experimenting, while large organisations are more likely to be recruiting staff with AI skills; larger organisations are deploying an agentic workforce to a greater extent and are also more likely to be reducing their recruitment due to AI this year

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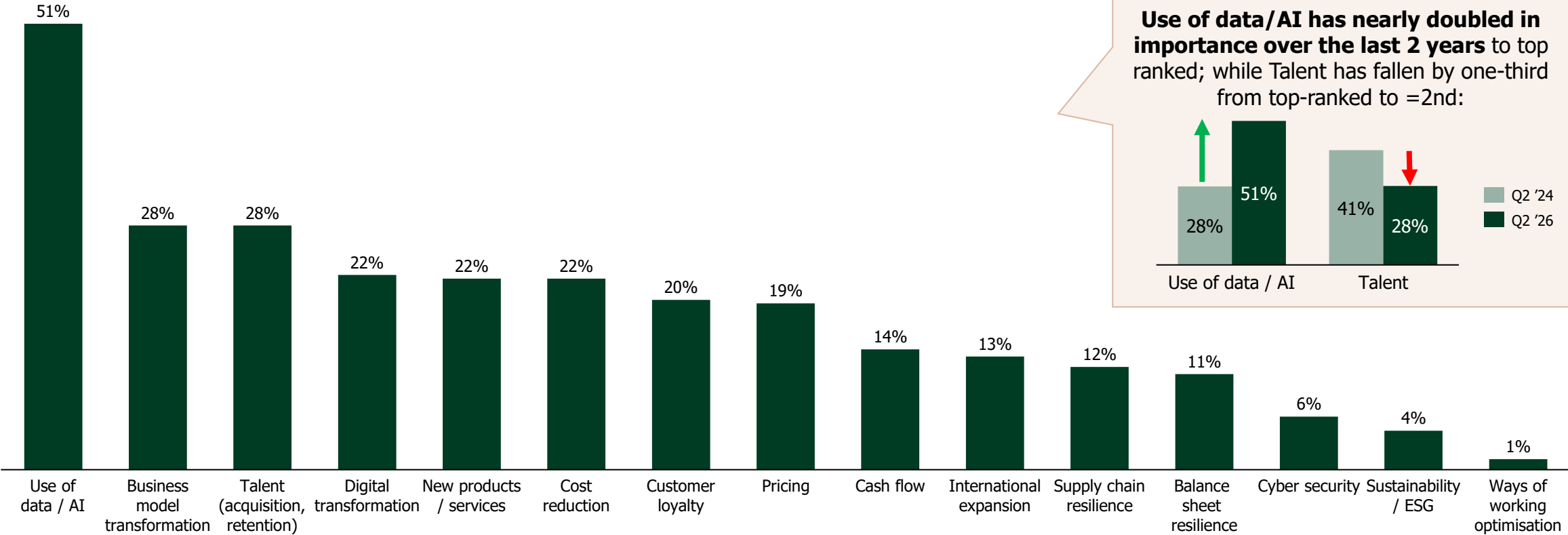
Variances by company type (sector & size)

Appendix: Sample details



Optimising the use of data and AI is a top 3 priority for half of organisations...

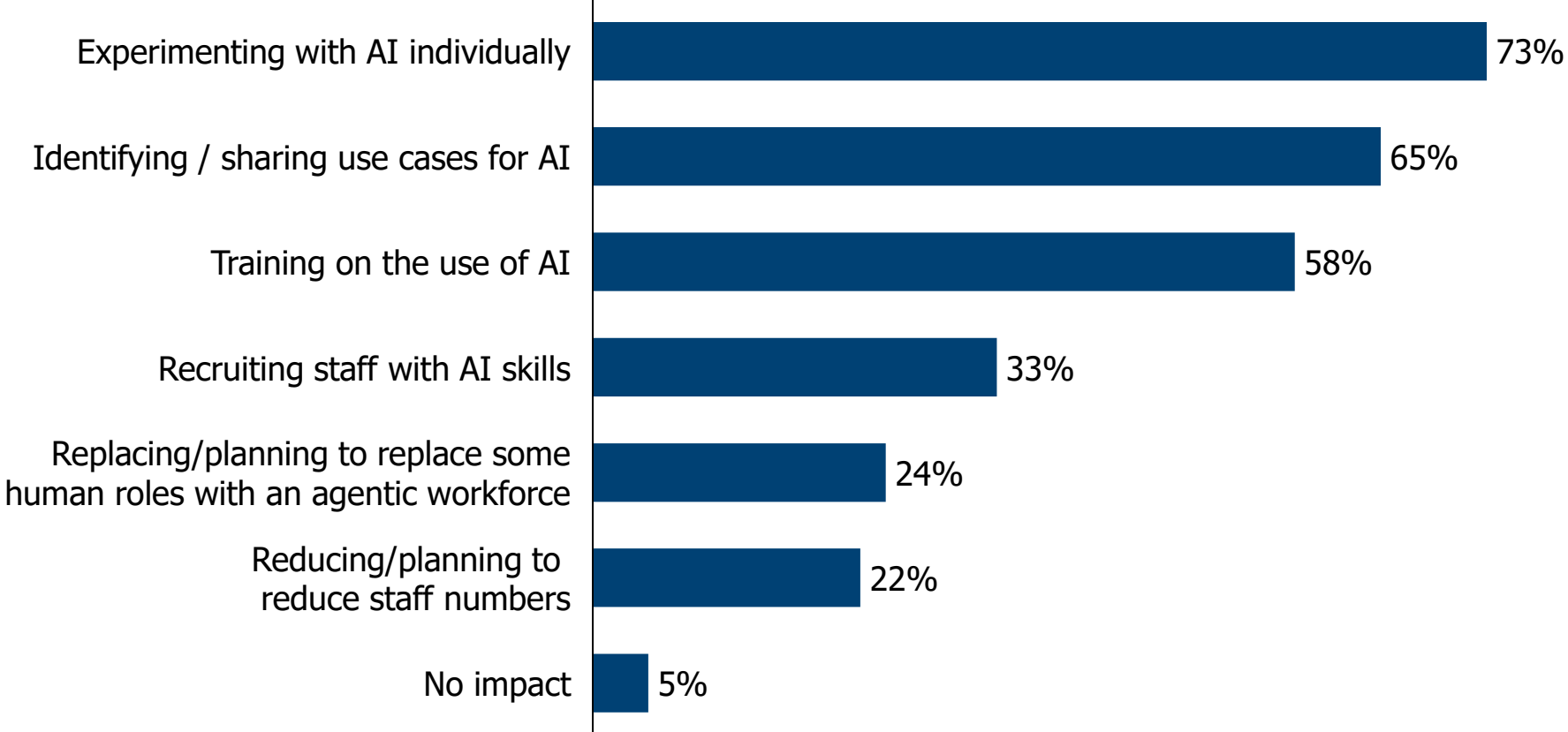
MOST IMPORTANT INTERNAL ISSUES FOR BUSINESSES, Q2 2026



n: 245
 Notes: Participants could select a maximum of 3 answers. Excludes those who answered 'Don't know'. 4% responded 'Other'
 Source: Eden McCallum 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]

... and AI is having an impact in multiple ways, with most workforces experimenting, sharing use cases, and training; for >20%, AI is replacing / reducing workers

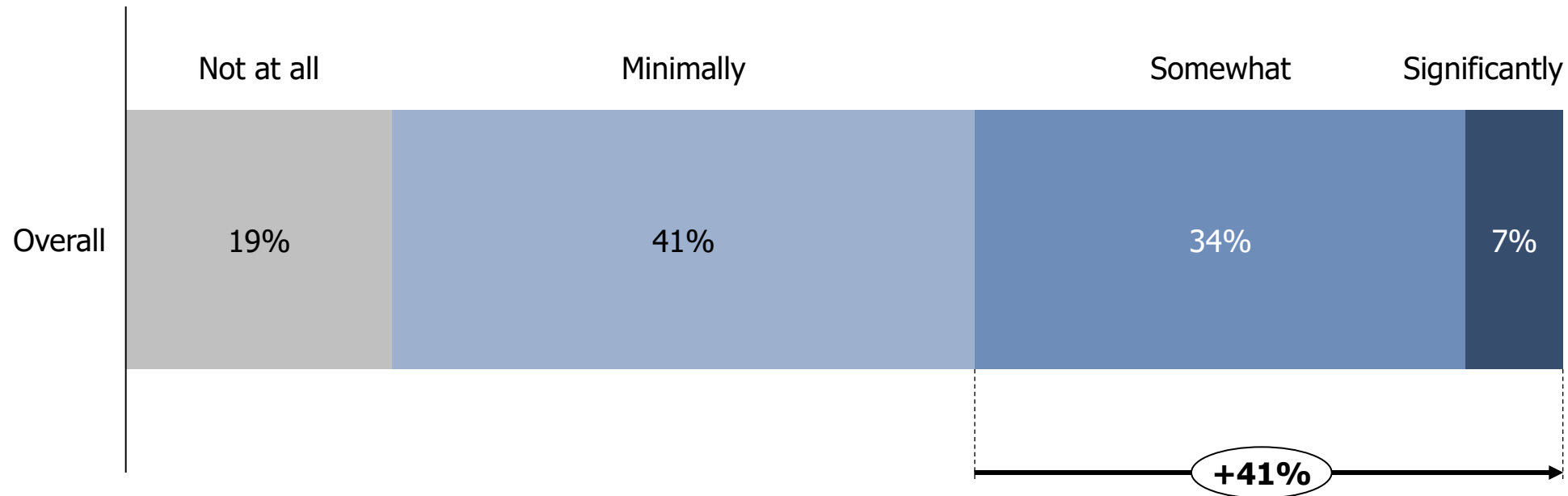
HOW AI IS IMPACTING ORGANISATIONS' WORKFORCES, Q2 2026



n: 241
Note: 5% selected Other
Source: Eden McCallum Business Outlook Survey Q2 '26: Q16 - In what ways, if any, is AI impacting your workforce? [Select all that apply]

40% are using an agentic workforce Somewhat/Significantly alongside their human workforce

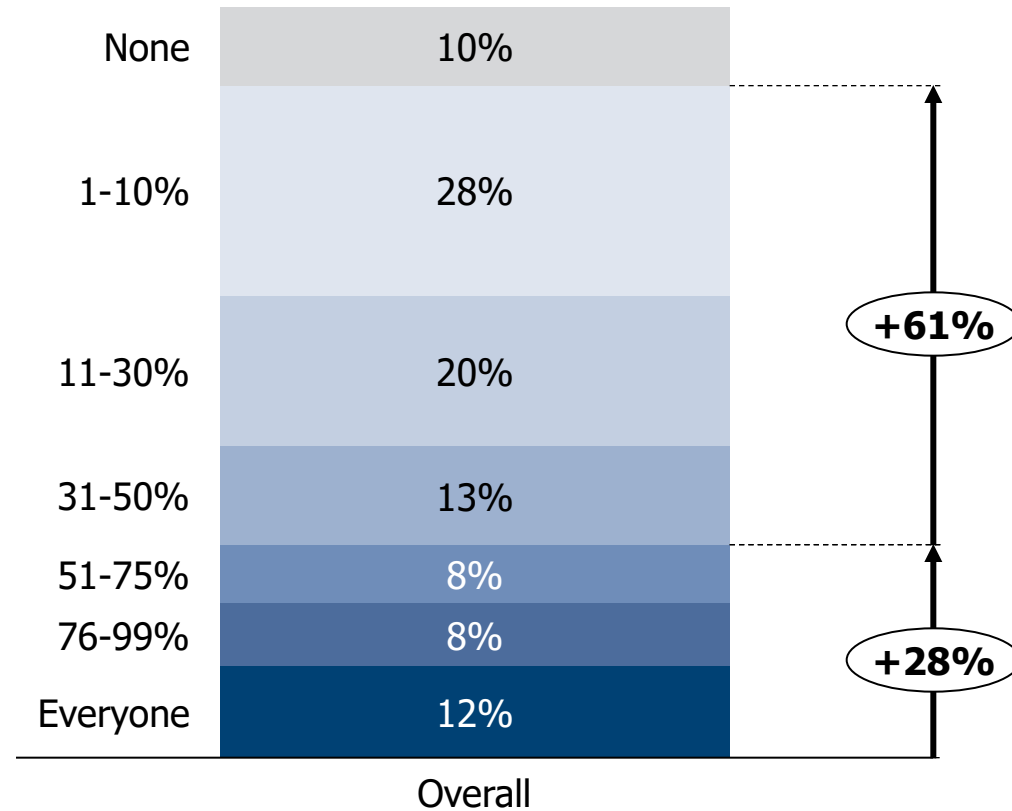
EXTENT OF USE OF AI AGENTS / CO-WORKERS / CHATBOTS, Q2 2026



n = 237
Note: Excludes those who answered 'Don't know' (n=6)
Source: Eden McCallum Business Outlook Survey Q2 '26: Q17 – Thinking now specifically about your organisation's agentic workforce: to what extent are you currently using AI agents / co-workers / chatbots in your workforce?

c.60% are training staff on AI, while 30% are training at least half of their workforce

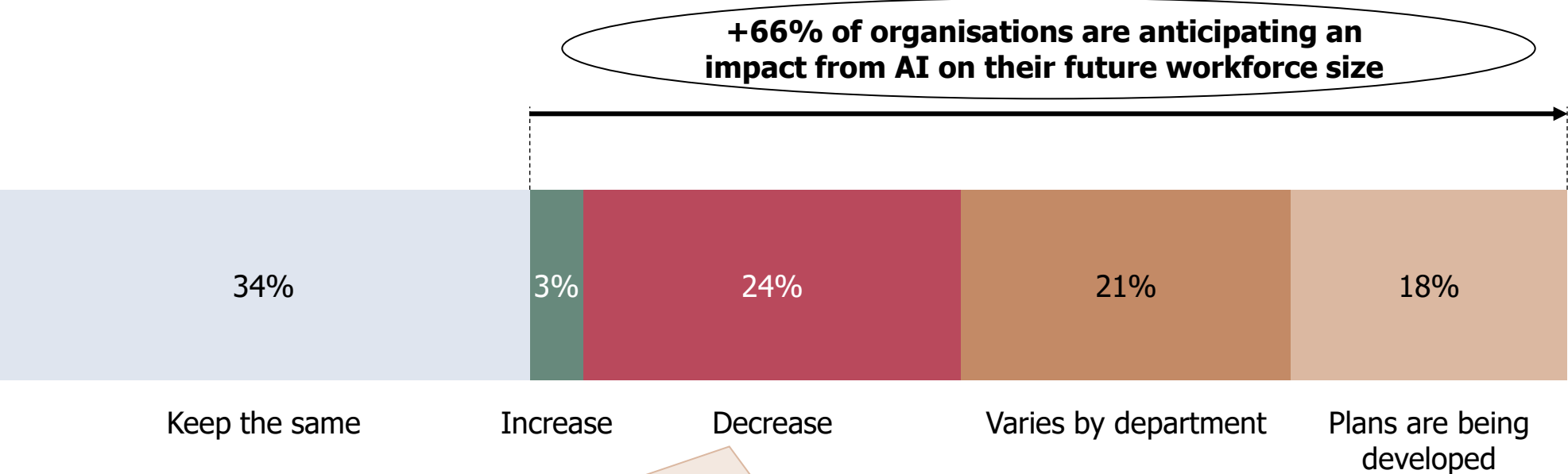
PERCENTAGE OF STAFF BEING TRAINED ON AI, Q2 2026



n = 229
Note: Excludes those who answered 'Don't know' (n=14).
Source: Eden McCallum 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 are expecting AI to impact the size of their workforce; nearly a quarter are expecting a decrease

ANTICIPATED IMPACT OF AI ON OVERALL FUTURE SIZE OF WORKFORCE, Q2 2026



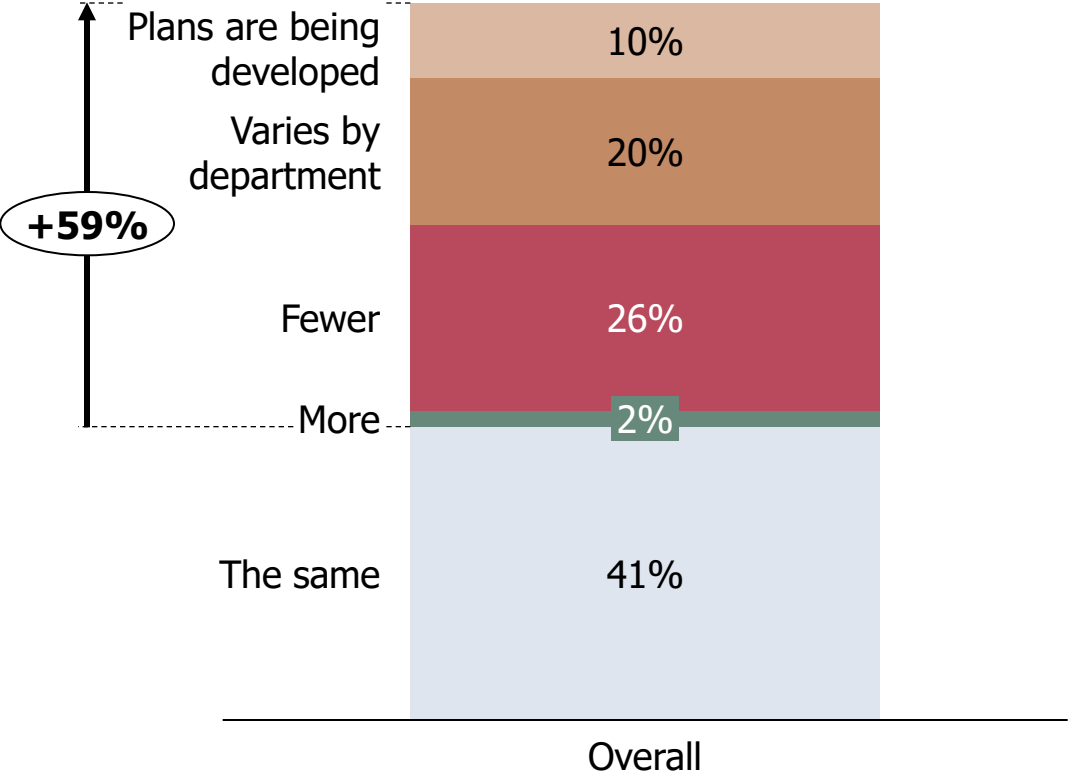
60% of the 24% who are expecting an overall decrease in the future size of their workforce are **already planning to recruit fewer staff this year**

n = 233
Note: Excludes those who answered 'Don't know' (n=10)
Source: Eden McCallum Business Outlook Survey Q2 '26: Q19 - Thinking now about AI and its impact on the size of your organisation's human workforce, overall – and all other things being equal – is AI leading you to: (Select one of: Increase the size of your human workforce; Decrease the size of your human workforce; Keep the size of your human workforce about the same; Varies by department so it's difficult to estimate the impact; Plans are being developed so it's difficult to estimate now; Don't know)?

Six in ten organisations are changing their recruitment plans this year due to AI; a quarter are recruiting fewer staff this year due to AI

ANTICIPATED IMPACT OF AI ON RECRUITMENT PLANS THIS YEAR, Q2 2026

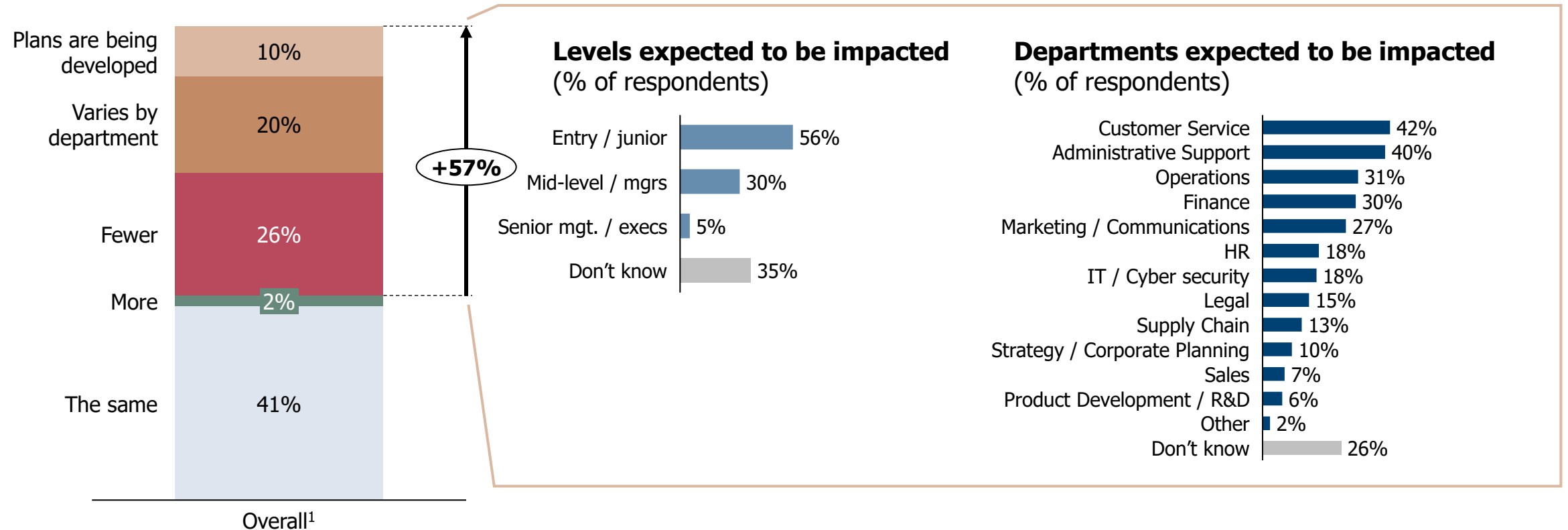
c.60% are changing their recruitment plans this year because of AI – of whom nearly half are planning to recruit fewer staff



n = 220
 Note: Excludes those who answered 'Don't know' (n=23)
 Source: Eden McCallum Business Outlook Survey Q2 '26: Q20 - And thinking specifically about your organisation'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 impact of planned recruitment changes this year is being felt most by entry/junior level staff and in customer service and administrative support roles

ANTICIPATED IMPACT OF AI ON RECRUITMENT PLANS THIS YEAR, Q2 2026



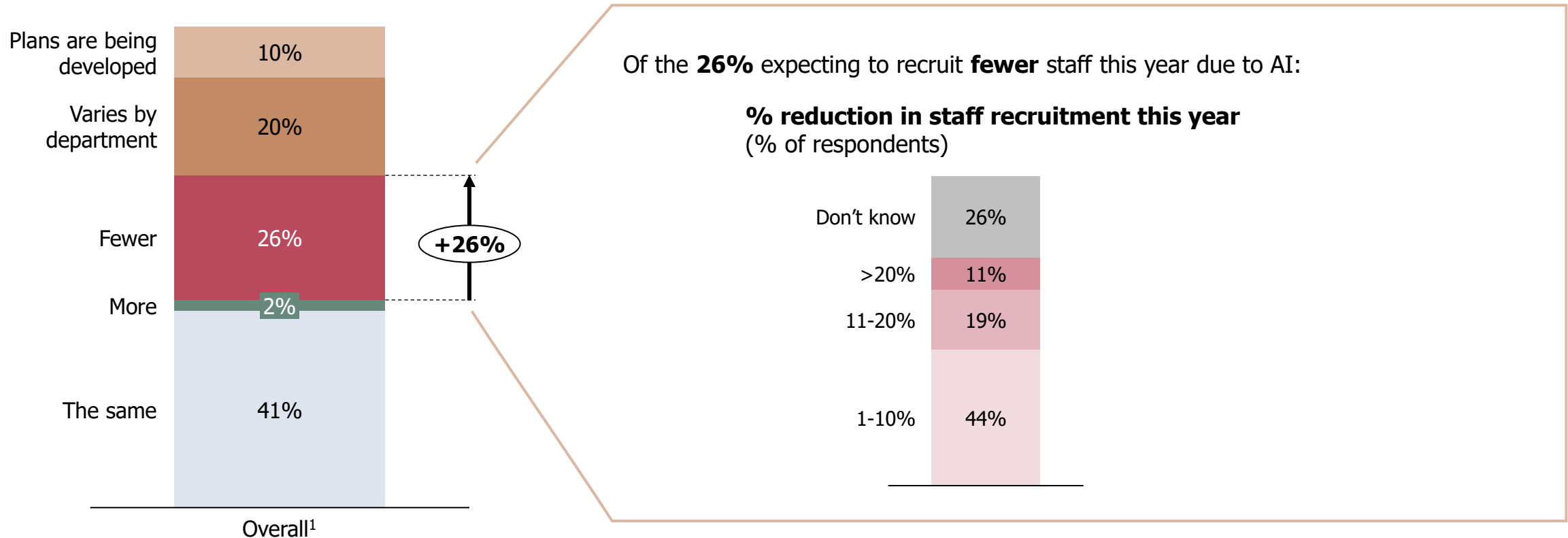
n = 220

Note: (1) Excludes those who answered 'Don't know' for Q20 (n=23)

Source: Eden McCallum Business Outlook Survey Q2 '26: Q20 - And thinking specifically about your organisation'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 that apply]; Q22 - In which departments / areas of your organisation 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)

For those reducing recruitment this year due to AI, most (44%) are planning <10% reduction, while 3 in 10 are reducing more significantly

ANTICIPATED IMPACT OF AI ON RECRUITMENT PLANS THIS YEAR, Q2 2026



n = 220

Note: (1) Excludes those who answered 'Don't know' for Q20 (n=23)

Source: Eden McCallum Business Outlook Survey Q2 '26: Q20 - And thinking specifically about your organisation'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);

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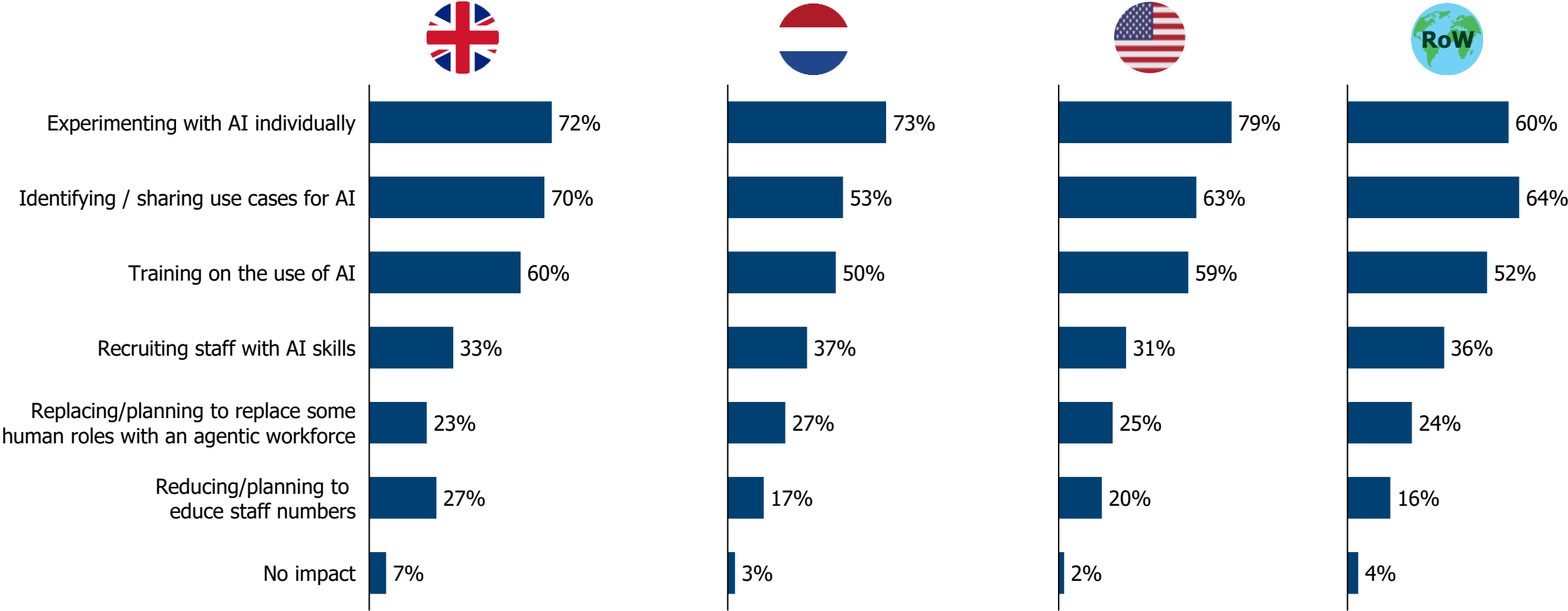
Variances by company type (sector & size)

Appendix: Sample details



Similar levels of activity are taking place in workforces across the geographies, with experimentation, identifying/sharing use cases and training as the top three in all

HOW AI IS IMPACTING ORGANISATIONS' WORKFORCES, Q2 2026, BY GEOGRAPHY



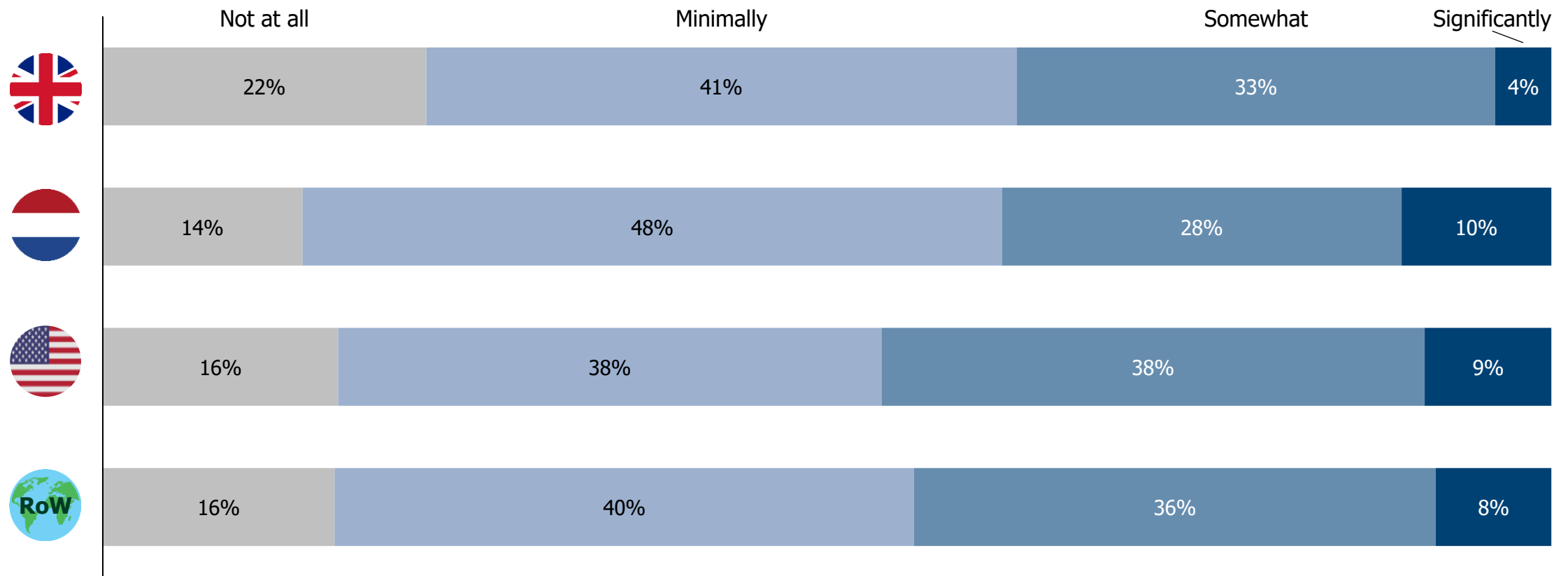
n: 241 (UK n:105; NL n: 30; US n: 81; RoW n: 25)

Notes: 5% responded 'Other' (8% UK, 3% NL, 4% US, 0% RoW)

Source: Eden McCallum Business Outlook Survey Q2 '26: Q16 - In what ways, if any, is AI impacting your workforce? [Select all that apply]; Q3 - In which country do you live?

There is limited variation across countries in the extent to which an agentic workforce is being deployed, although the UK seems somewhat less advanced

EXTENT OF USE OF AI AGENTS / CO-WORKERS / CHATBOTS, Q2 2026, BY GEOGRAPHY



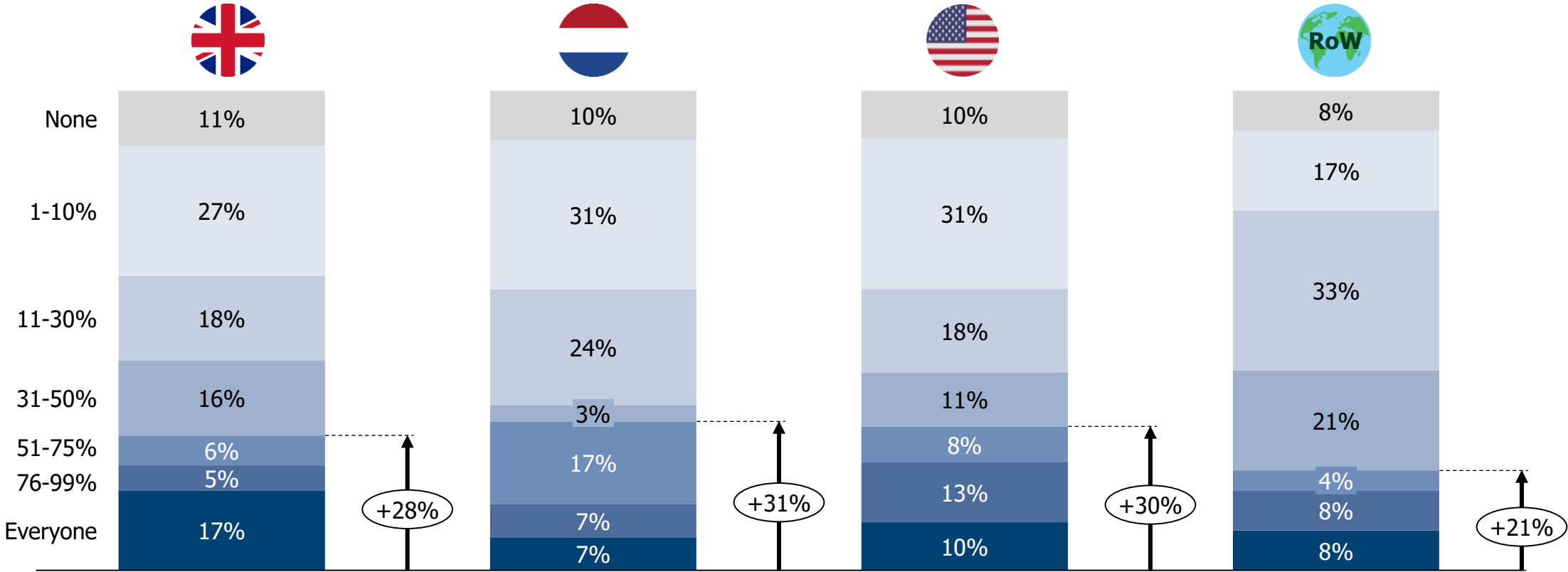
n = 237 (UK n: 103; NL n: 29; US n: 80; RoW n: 25)

Note: Excludes those who answered 'Don't know' (n=6)

Source: Eden McCallum Business Outlook Survey Q2 '26: Q17 – Thinking now specifically about your organisation's agentic workforce: to what extent are you currently using AI agents / co-workers / chatbots in your workforce?; Q3 – In which country do you live?

The extent to which AI training is occurring across workforces is similar in the UK, NL and US, and slightly lower in RoW

PERCENTAGE OF STAFF BEING TRAINED ON AI, Q2 2026, BY GEOGRAPHY



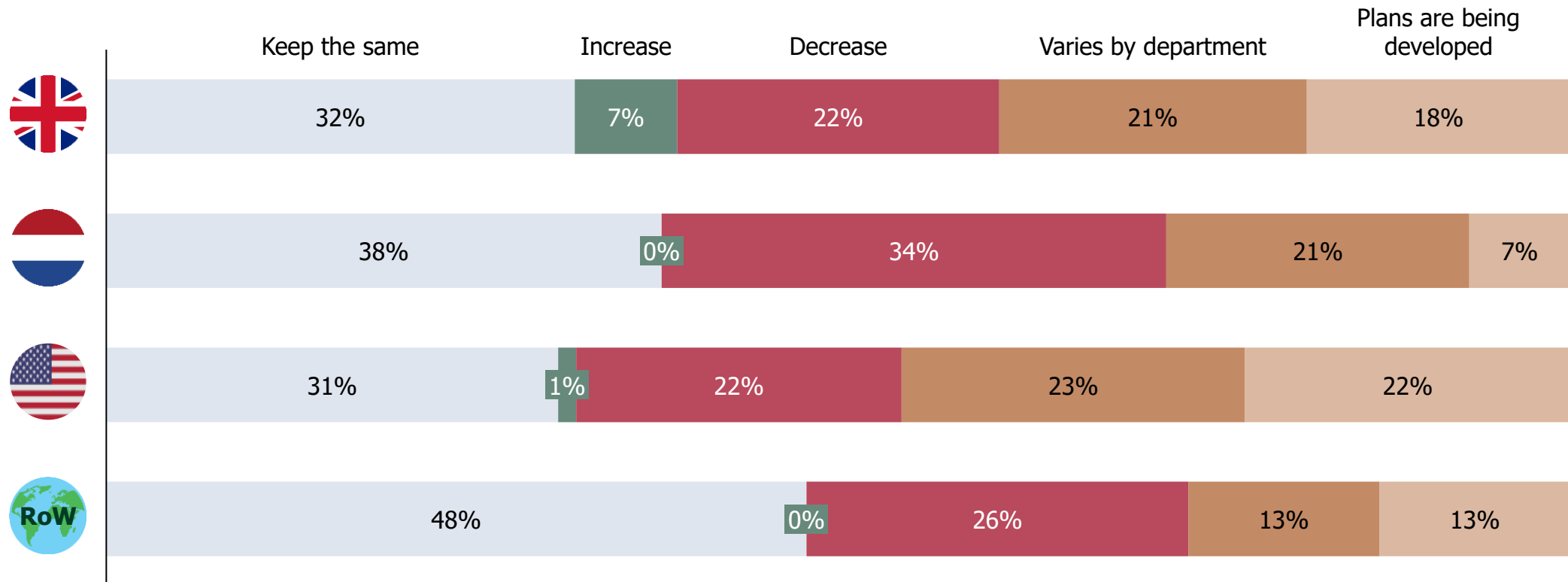
n = 229 (UK n: 96; NL n: 29; US n: 80; RoW n: 24)

Note: Excludes those who answered 'Don't know' (n=14)

Source: Eden McCallum 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); Q3 – In which country do you live?

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

ANTICIPATED IMPACT OF AI ON OVERALL FUTURE SIZE OF WORKFORCE, BY GEOGRAPHY, Q2 2026



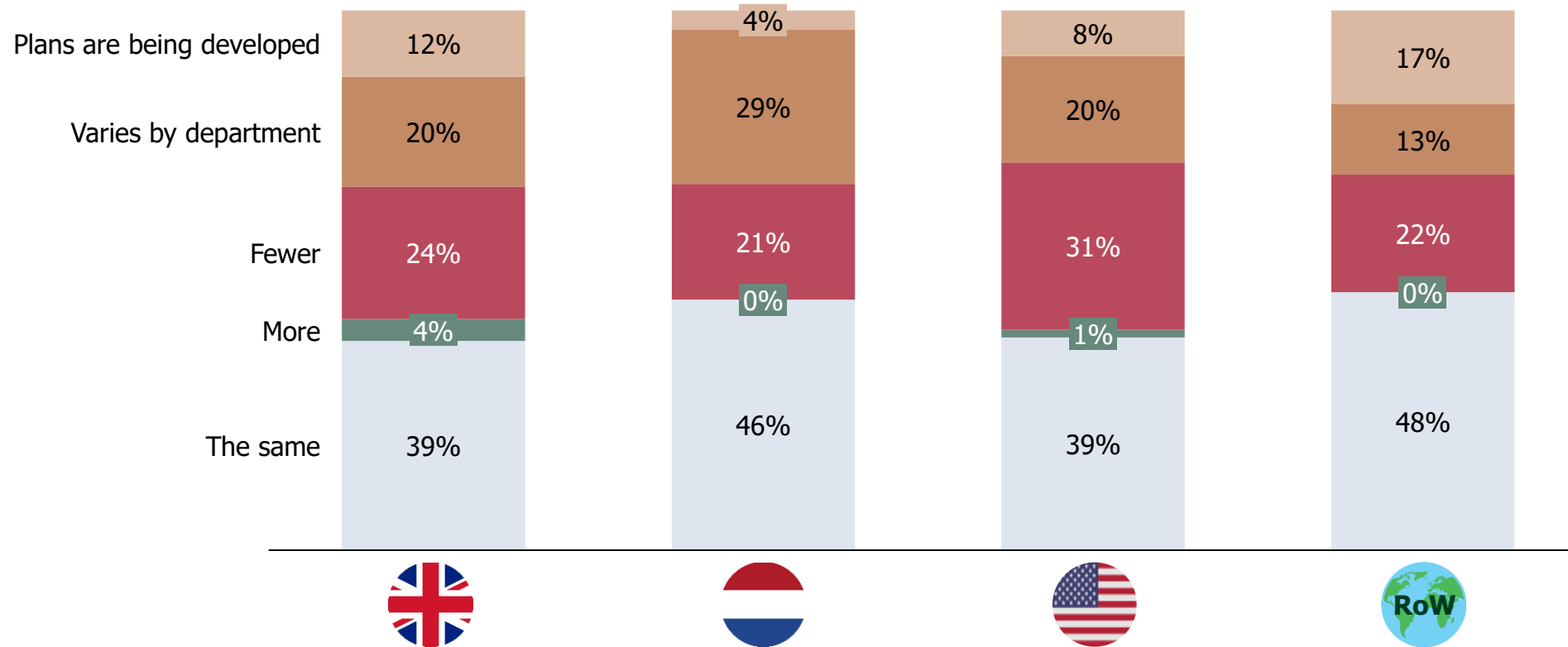
n = 233 (UK n: 100; NL n: 29; US n: 81; RoW n: 23)

Note: Excludes those who answered 'Don't know' (n=10)

Source: Eden McCallum Business Outlook Survey Q2 '26: Q19 - Thinking now about AI and its impact on the size of your organisation's human workforce, overall – and all other things being equal – is AI leading you to: (Select one of: Increase the size of your human workforce; Decrease the size of your human workforce; Keep the size of your human workforce about the same; Varies by department so it's difficult to estimate the impact; Plans are being developed so it's difficult to estimate now; Don't know?); Q3 – In which country do you live?

Similarly, most organisations in all geographies are expecting to change their recruitment this year due to AI, with the US most likely to anticipate a reduction

ANTICIPATED IMPACT OF AI ON RECRUITMENT PLANS THIS YEAR, Q2 2026, BY GEOGRAPHY



n = 220 (UK n: 98; NL n: 28; US n: 71; RoW n: 23)

Note: Excludes those who answered 'Don't know' (n=23)

Source: Eden McCallum Business Outlook Survey Q2 '26: Q20 - And thinking specifically about your organisation'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?; Q3 - In which country do you live?

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Variations by company type

- **Sector**

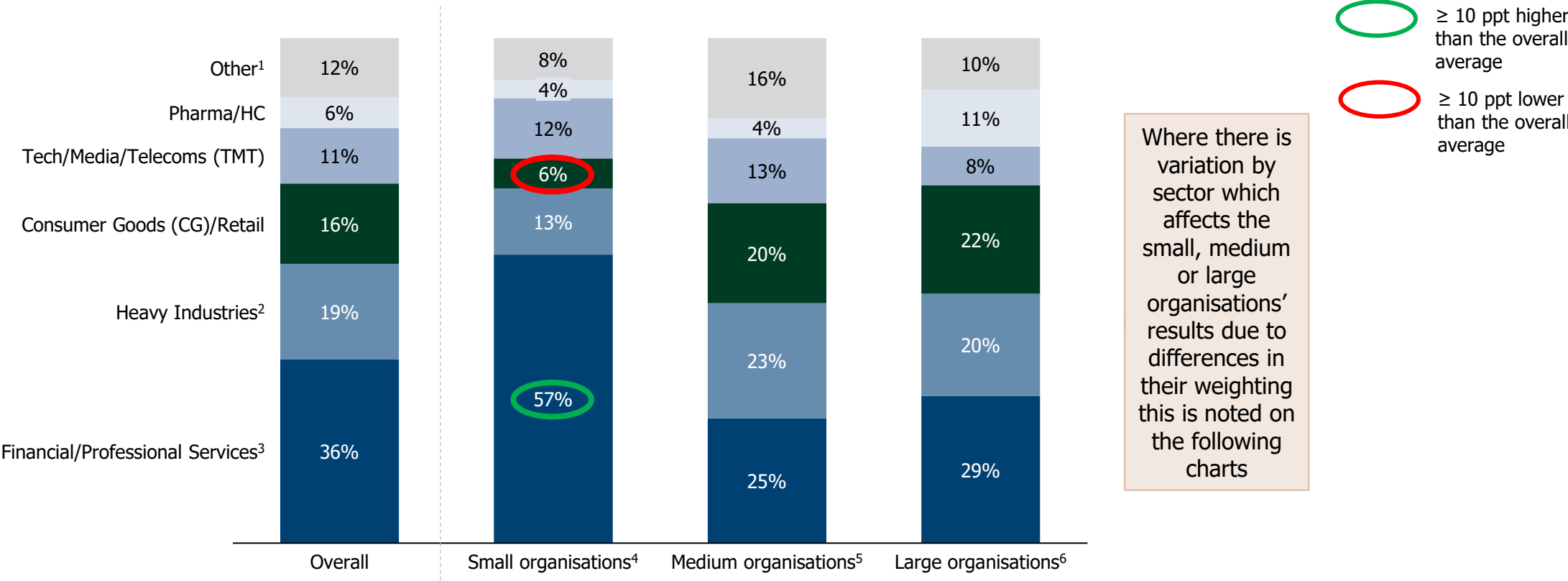
- **Size**

Appendix: Sample details



Context: while the overall sample has broad representation of sectors and sizes, for small organisations there is greater weighting of Professional Services/PE/VC/FS

PERCENTAGE OF SAMPLE BY COMPANY SIZE AND SECTOR, Q2 2026



n = 243 (Small n=78, Medium n=94, Large n=71)
 Note: (1) Other includes Public Sector/Social Sector/NGO, Travel/Leisure; (2) Heavy industries includes Industrials/Manufacturing, Primary industries, Transportation/Logistics,, Engineering/Construction/Real Estate and Energy/Utilities; (3) Includes B2B & Professional Services, PE/VC and Financial Services; (4) <250 employees; (5) 250-4999 employees; (6) 5000+ employees
 Source: Eden McCallum Business Outlook Survey Q2 '26: Q1 - Which industry is your company / organisation in?; Q2 - How many people does your company / organisation employ in total?

TMT is taking most action with AI in the workplace while Heavy Industries are further behind

HOW AI IS IMPACTING ORGANISATIONS' WORKFORCES, Q2 2026, OVERALL AND FOR SELECTED SECTORS

Overall		Sectors taking less action (10ppt+ fewer respondents)	Sectors taking more action (10ppt+ greater respondents)
Experimenting with AI individually	73%	• Heavy Industries (57%)	
Identifying / sharing use cases for AI	65%	• Heavy Industries (50%)	• TMT (82%)
Training on the use of AI	58%	• Heavy Industries (59%)	• Financial/Prof. Services (69%) • TMT (79%)
Recruiting staff with AI skills	33%	• Heavy Industries (20%) • CG/Retail (14%)	• TMT (57%)
Replacing/planning to replace some human roles with an agentic workforce	24%	• n/a	• n/a
Reducing/planning to reduce staff numbers	22%	• n/a	• TMT (36%)
No impact	5%	• n/a	• n/a

While limited variation here (% respondents by sector), there is in extent used (see deep-dive on agentic workforce later)

NB. Small sample for TMT

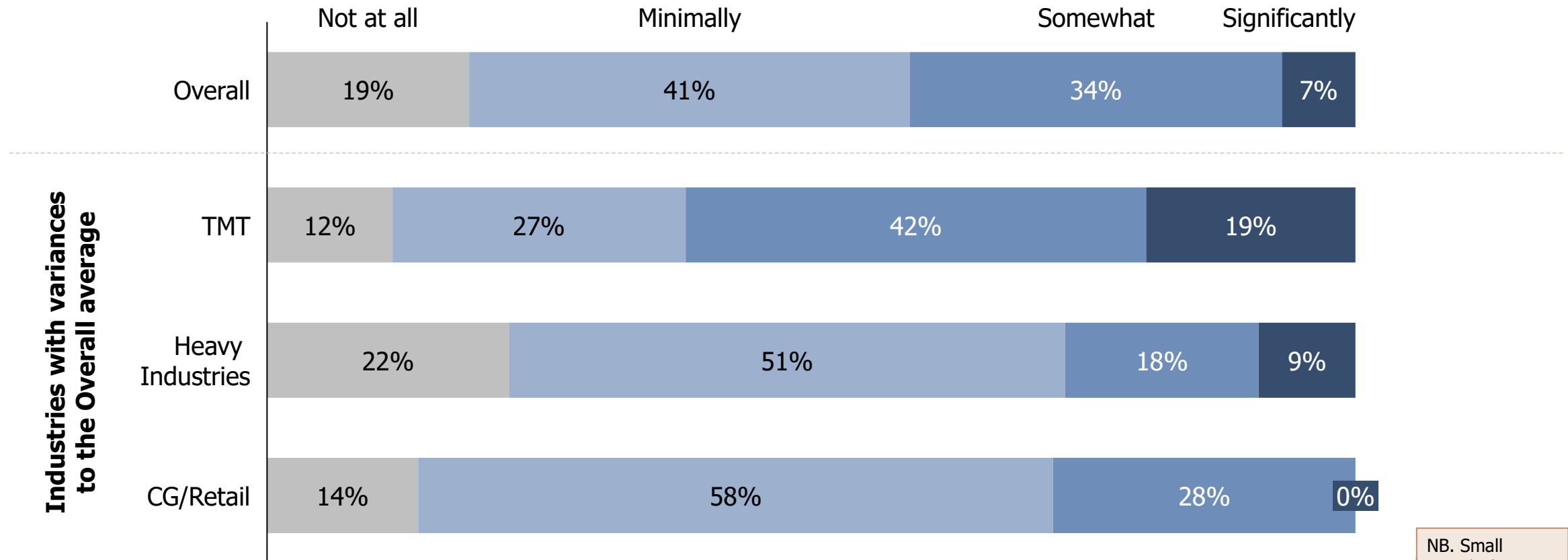
n: 241 (Heavy Industries n=46, CG/Retail n=35, Financial/Professional Services n=90, TMT n=28)

Note: 5% selected Other (6% CG/Retail, 13% FS, 0% TMT, 2% Heavy Industries, 5% Prof Services/PE/VC)

Source: Eden McCallum Business Outlook Survey Q2 '26: Q16 - In what ways, if any, is AI impacting your workforce? [Select all that apply]; Q1 - Which industry is your company / organisation in?;

TMT is more likely to be Somewhat/ Significantly using an agentic workforce while CG /Retail and Heavy Industries are less likely

EXTENT OF USE OF AI AGENTS / CO-WORKERS / CHATBOTS, Q2 2026, OVERALL AND FOR SELECTED SECTORS



NB. Small sample for TMT

n = 237 (of whom: TMT n= 26, CG/Retail n= 36, Heavy Industries n= 45)

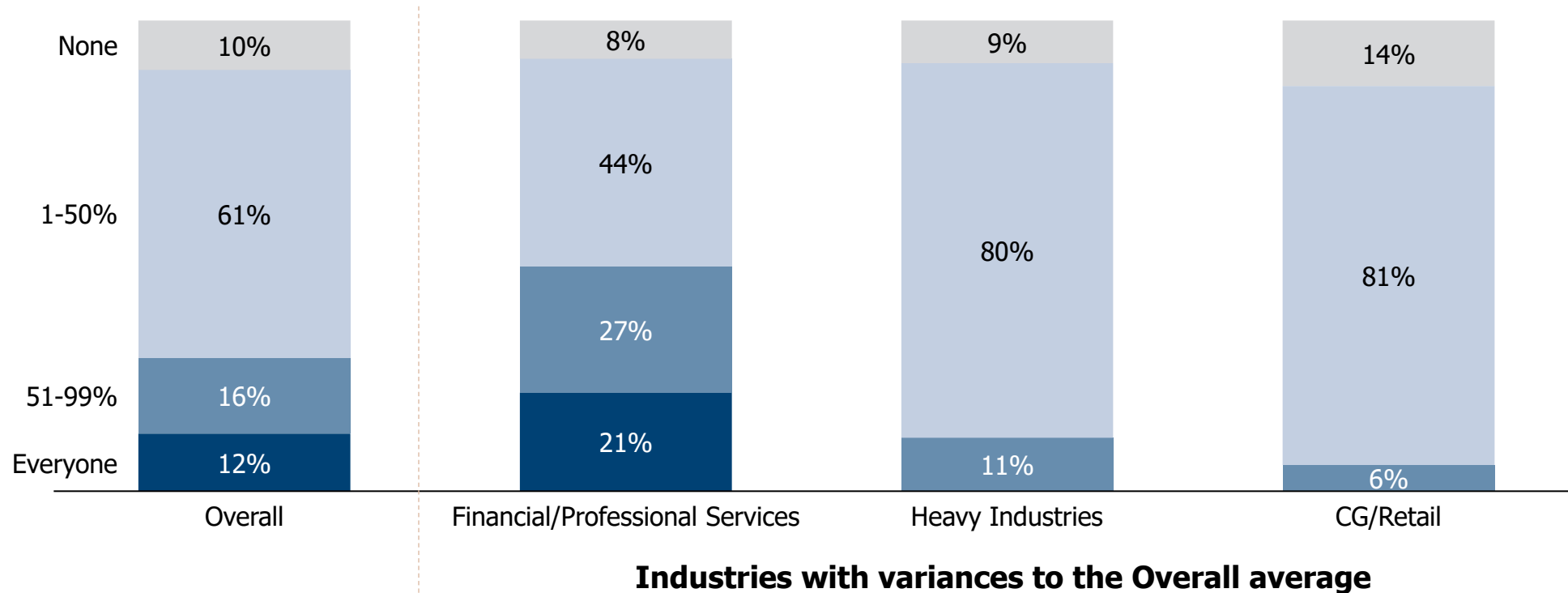
Note: Excludes those who answered 'Don't know' (n=6)

Source: Eden McCallum Business Outlook Survey Q2 '26: Q17 – Thinking now specifically about your organisation’s agentic workforce: to what extent are you currently using AI agents / co-workers / chatbots in your workforce?;

Q1 - Which industry is your company / organisation in?;

Financial/Professional Services are more likely to be training over 50% of their staff, while CG/Retail and Heavy Industries are less likely

PERCENTAGE OF STAFF BEING TRAINED ON AI, Q2 2026, OVERALL AND FOR SELECTED SECTORS



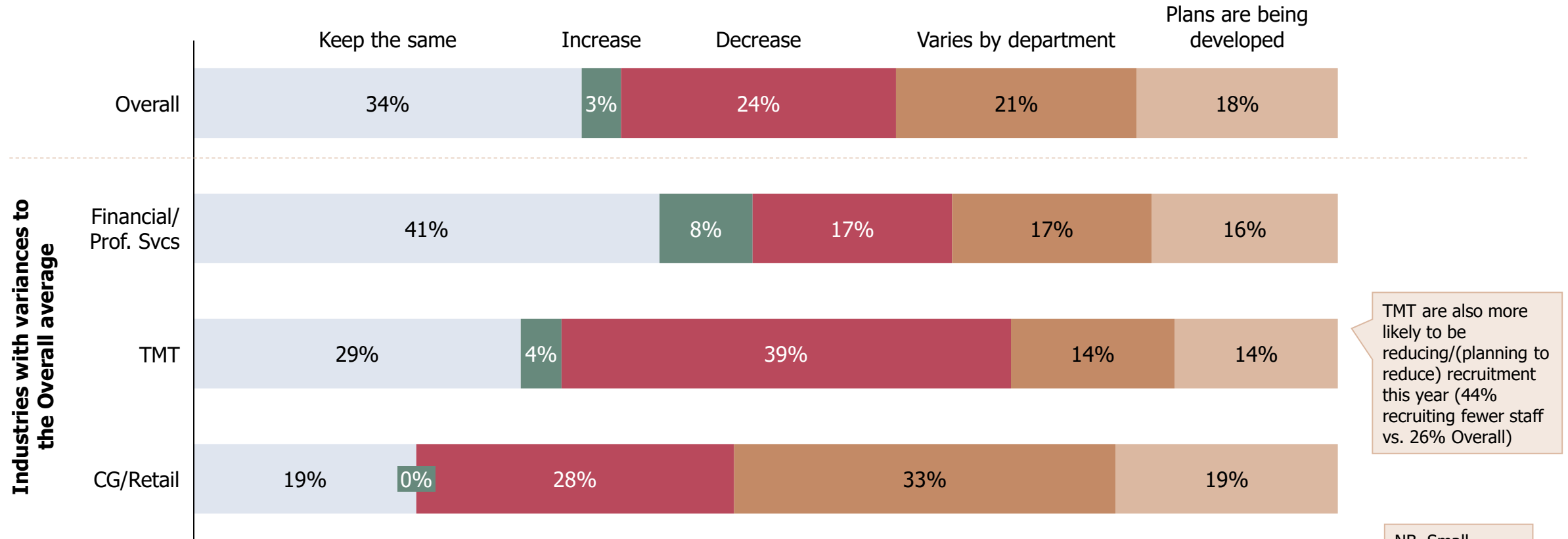
n = 229 (of whom, Financial/Professional Services n = 87, Consumer Goods/Retail n= 37, Heavy Industries n= 44)

Note: Excludes those who answered 'Don't know' (n=14).

Source: Eden McCallum 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; Q1 - Which industry is your company / organisation in?;

There is some variation by sector in expected future workforce size – Financial/ Professional Services are slightly more likely to expect either the same/increased workforce, TMT a decrease and CG/Retail more variation by department

ANTICIPATED IMPACT OF AI ON FUTURE SIZE OF WORKFORCE, Q2 2026, OVERALL AND FOR SELECTED SECTORS



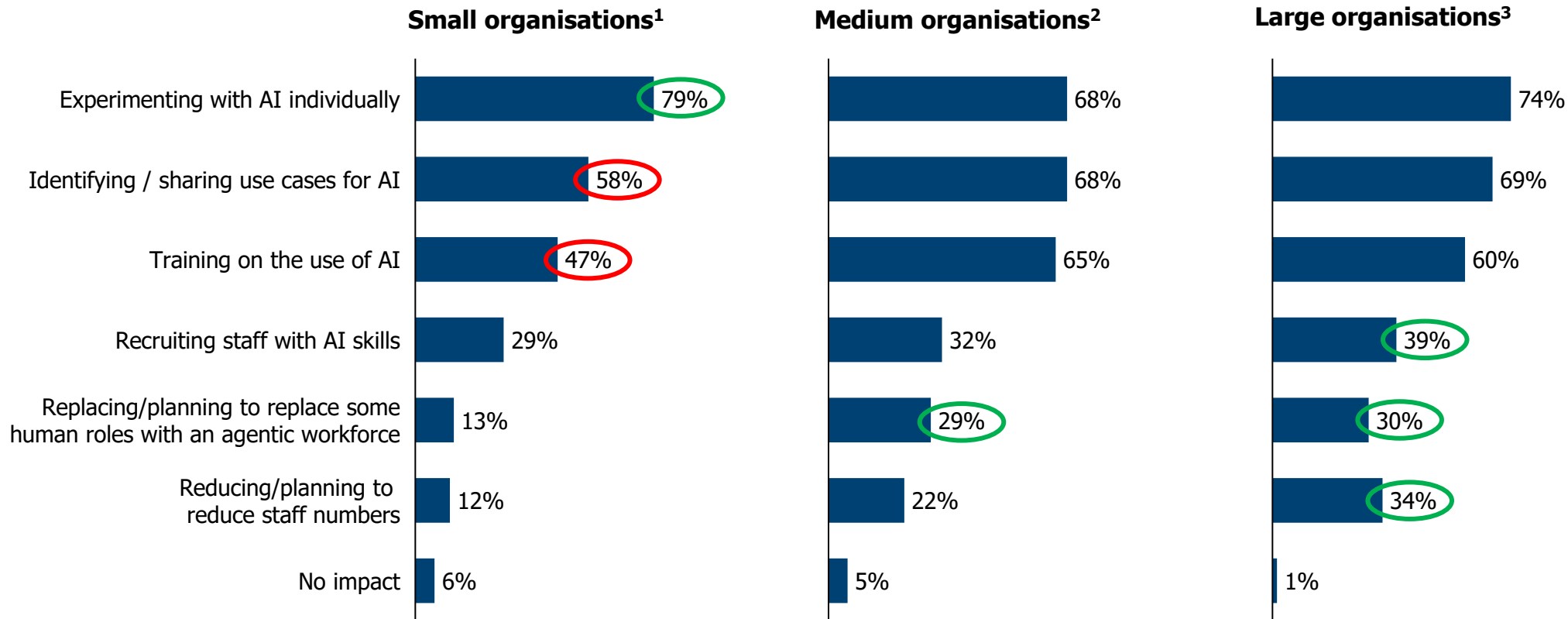
n = 233 (of whom TMT n=28, Financial/Professional Services n= 86, CG/Retail n=36)

Note: Excludes those who answered 'Don't know' (n=10)

Source: Eden McCallum Business Outlook Survey Q2 '26: Q19 - Thinking now about AI and its impact on the size of your organisation's human workforce, overall – and all other things being equal – is AI leading you to: (Select one of: Increase the size of your human workforce; Decrease the size of your human workforce; Keep the size of your human workforce about the same; Varies by department so it's difficult to estimate the impact; Plans are being developed so it's difficult to estimate now; Don't know)?; Q1 - Which industry is your company / organisation in?;

Small organisations are more likely to be experimenting, while large organisations are more likely to be recruiting staff with AI skills or reducing staff because of AI

HOW AI IS IMPACTING ORGANISATIONS' WORKFORCES, Q2 2026, BY COMPANY SIZE



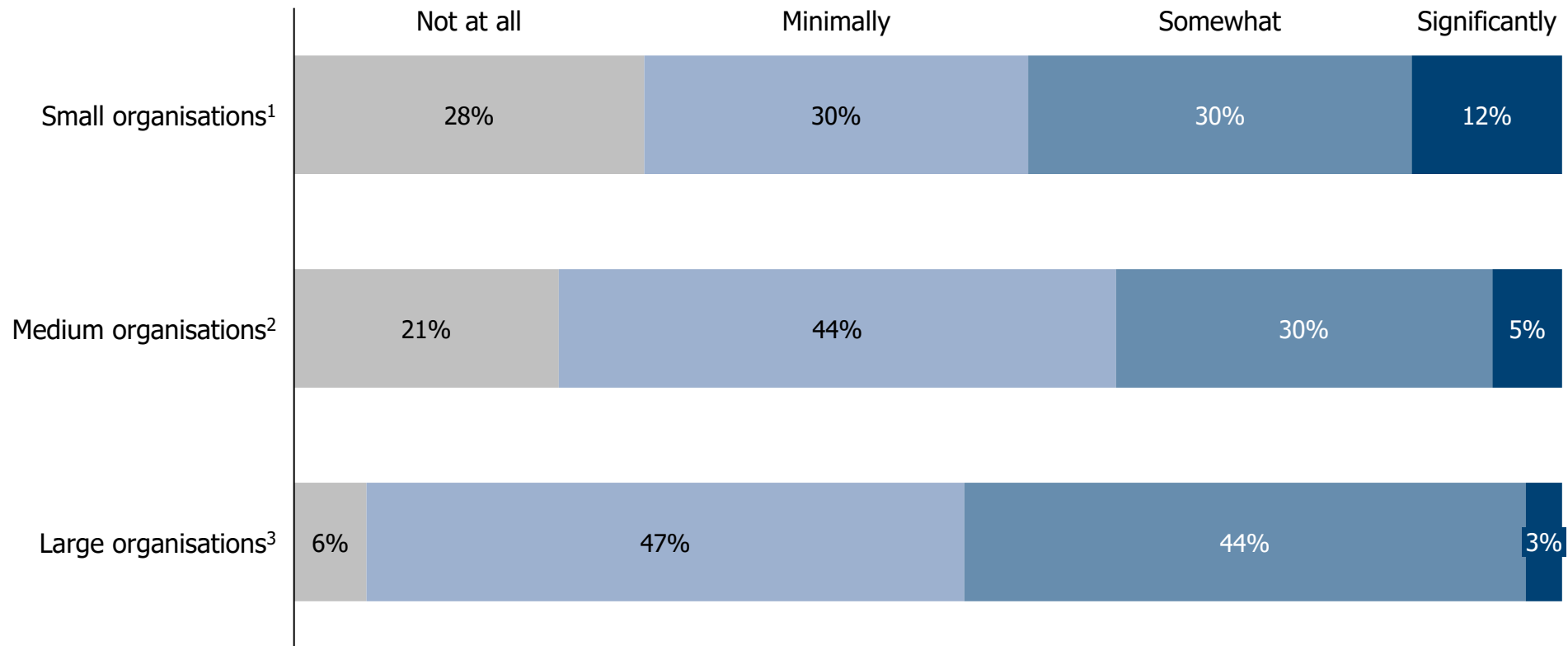
n: 241 (Small n: 78; Medium n: 93; Large n: 70)

Note: (1) <250 employees; (2) 250-4999 employees; (3) 5000+ employees. 5% responded 'other' (5% Small businesses; 8% Medium businesses; 1% Large businesses)

Source: Eden McCallum Business Outlook Survey Q2 '26: Q16 - In what ways, if any, is AI impacting your workforce? [Select all that apply]; Q2 - How many people does your company / organisation employ in total?

Larger organisations are more likely to be using AI agents/co-workers; smaller organisations are more bifurcated to using them either significantly or not at all

EXTENT OF USE OF AI AGENTS / CO-WORKERS, Q2 2026, BY ORGANISATION SIZE



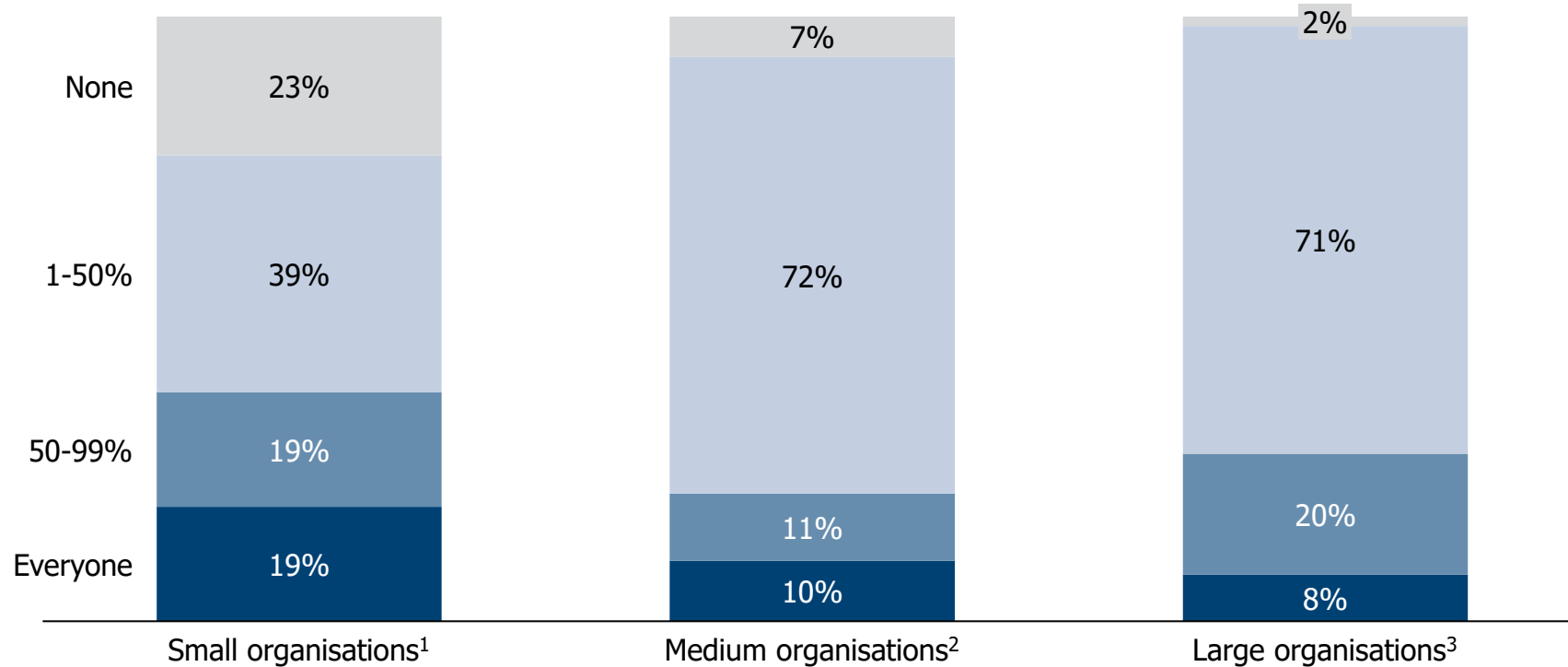
n = 237 (Small n: 76; Medium n: 91; Large n: 70)

Note: Excludes those who answered 'Don't know' (n=6); (1) <250 employees; (2) 250-4999 employees; (3) 5000+ employees

Source: Eden McCallum Business Outlook Survey Q2 '26: Q17 – Thinking now specifically about your organisation's agentic workforce: to what extent are you currently using AI agents / co-workers / chatbots in your workforce?; Q2 - How many people does your company / organisation employ in total?

Smaller organisations are more likely to be training at least 50% of their staff on AI, however a large proportion also provide no training

PERCENTAGE OF STAFF BEING TRAINED ON AI, Q2 2026, BY ORGANISATION SIZE



NB. Some of the greater proportion of 50%+ staff trained by small organisations can be explained by the greater weight of Financial/ Professional Services and the lower weight of CG/Retail in that size segment

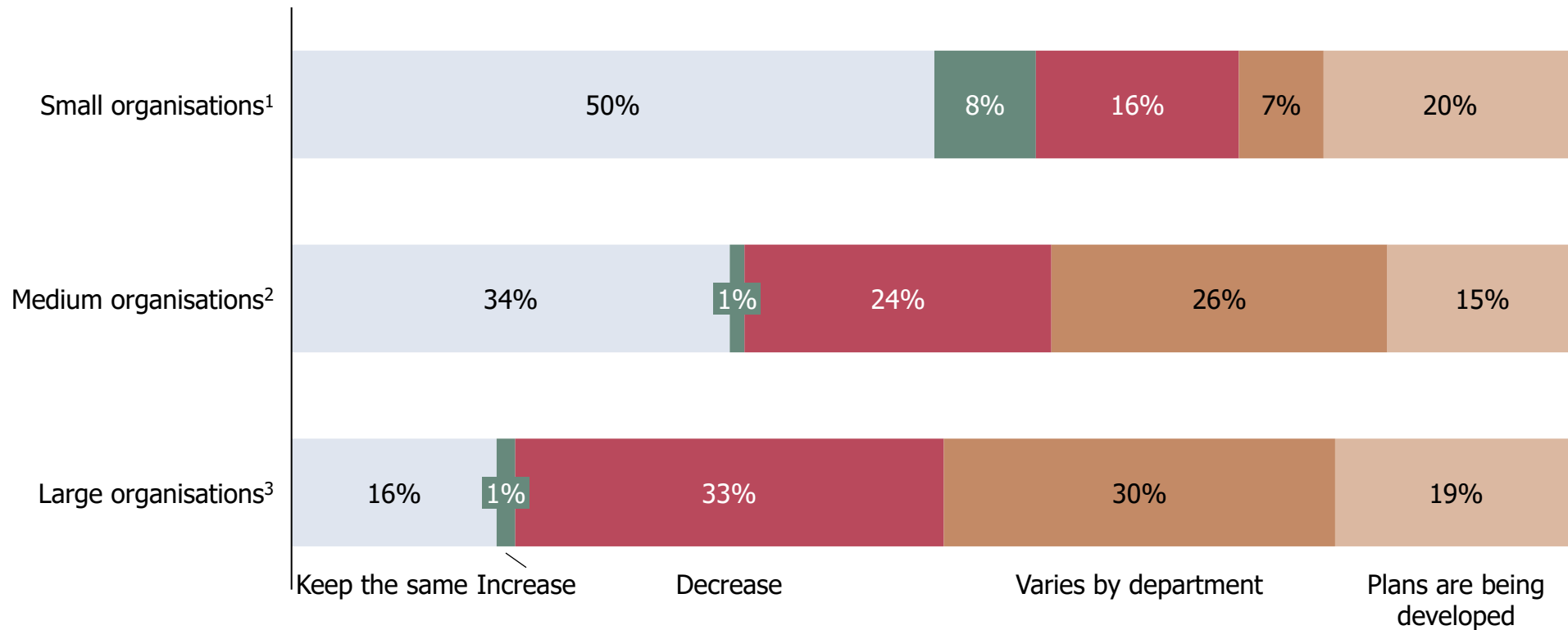
n = 229 (Small n: 74; Medium n: 90; Large n: 65)

Note: Excludes those who answered 'Don't know' (n=14); (1) <250 employees; (2) 250-4999 employees; (3) 5000+ employees

Source: Eden McCallum 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; Q2 - How many people does your company / organisation employ in total?

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

ANTICIPATED IMPACT OF AI ON OVERALL FUTURE SIZE OF WORKFORCE, BY SIZE, Q2 2026



NB. Some of the greater proportion of small organisations expecting the Same/Increased future workforce can be explained by the greater weight of Financial/Professional Services in their sample

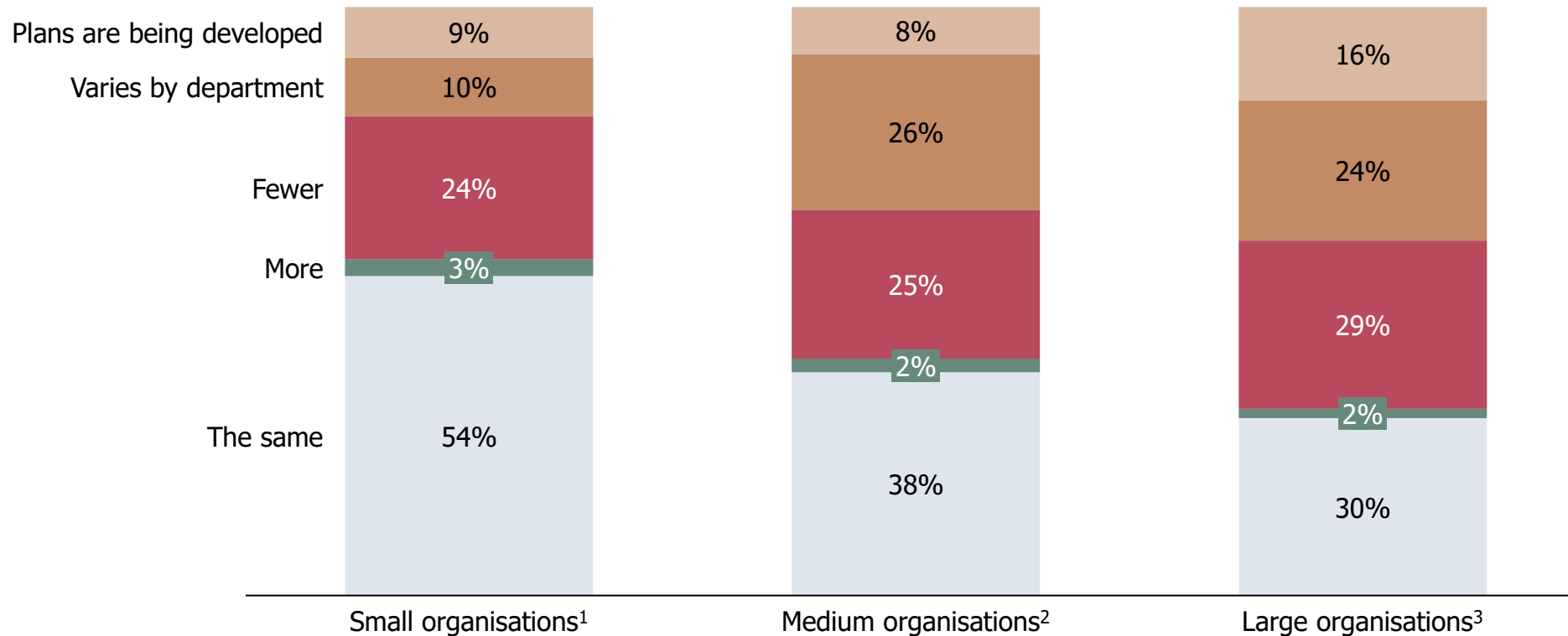
n = 233 (Small n: 76; Medium n: 88; Large n: 69)

Note: Excludes those who answered 'Don't know' (n=10); (1) <250 employees; (2) 250-4999 employees; (3) 5000+ employees

Source: Eden McCallum Business Outlook Survey Q2 '26: Q19 - Thinking now about AI and its impact on the size of your organisation's human workforce, overall – and all other things being equal – is AI leading you to; (Select one of: Increase the size of your human workforce; Decrease the size of your human workforce; Keep the size of your human workforce about the same; Varies by department so it's difficult to estimate the impact; Plans are being developed so it's difficult to estimate now; Don't know)?; Q2 - How many people does your company / organisation employ in total?

AI is least likely to be impacting recruitment this year for smaller businesses; while 7 in 10 larger organisations are changing recruitment plans due to AI (29% are reducing)

ANTICIPATED IMPACT OF AI ON RECRUITMENT PLANS THIS YEAR, Q2 2026, BY COMPANY SIZE



n = 220 (Small n: 70; Medium n: 87; Large: 63)

Note: Excludes those who answered 'Don't know' (n=23); (1) <250 employees; (2) 250-4999 employees; (3) 5000+ employees

Source: Eden McCallum Business Outlook Survey Q2 '26: Q20 -And thinking specifically about your organisation'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?; Q2 - How many people does your company / organisation employ in total?

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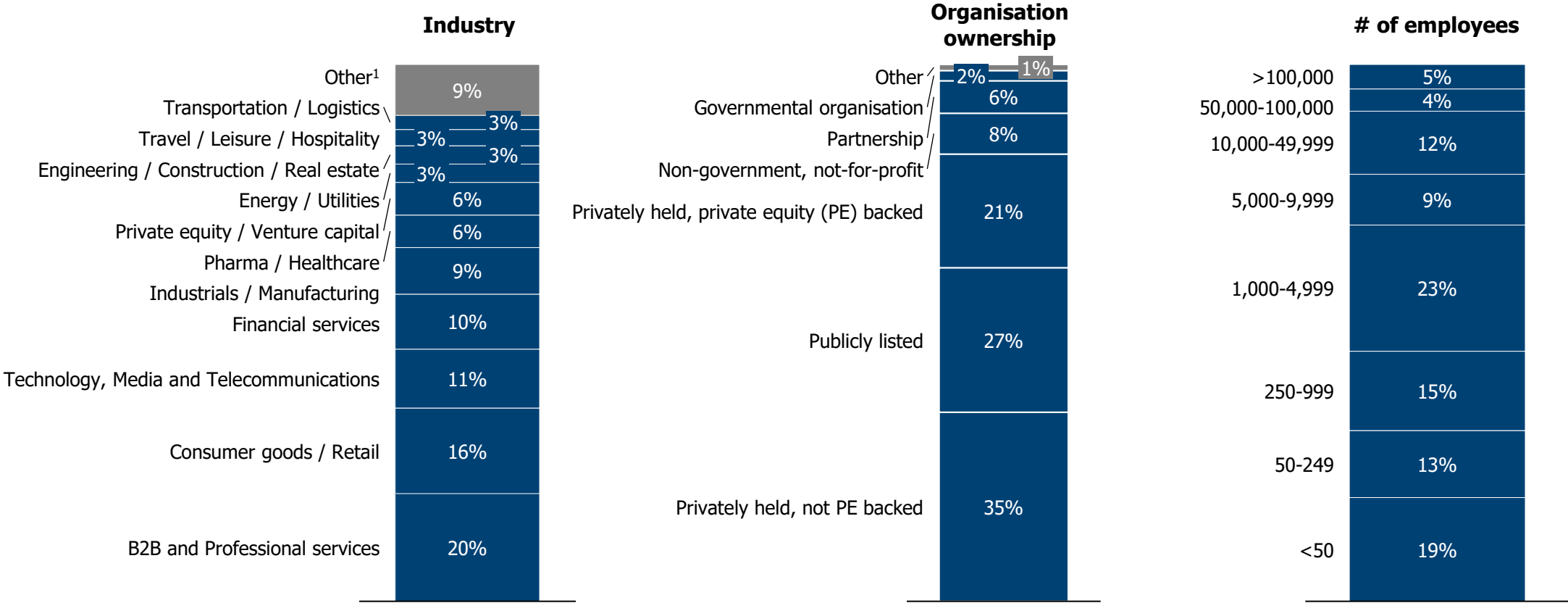
Variations by company type (sector & size)

Appendix: Sample details



Survey sample information [1 of 3]

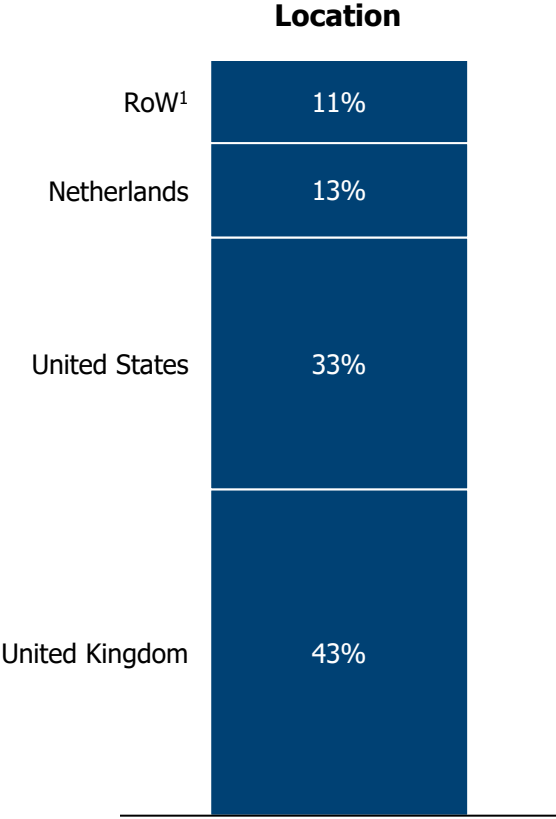
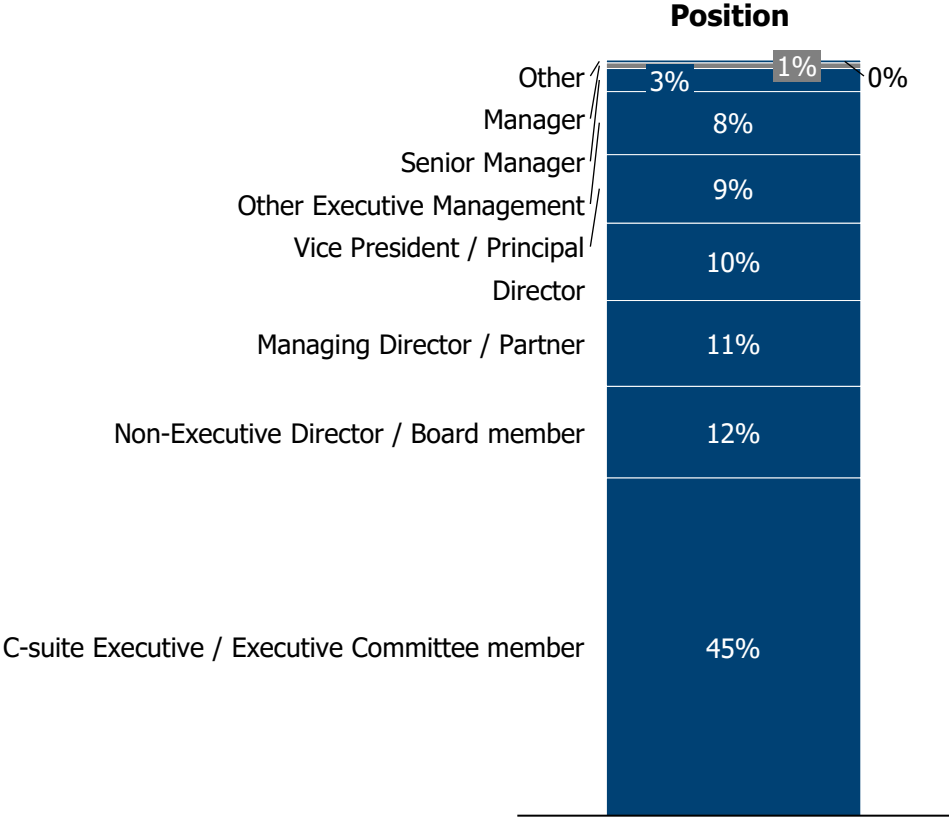
KEY FACTS ABOUT THE SAMPLE SURVEY RESPONDENTS' ORGANISATIONS



n: 264
 Notes: 1) Other includes Primary industries (mining, forestry, agriculture, etc) 1%; Public sector/social sector/NGO 2%
 Source: Eden McCallum Business Outlook Survey Q2 '26: Q1 - Which industry is your company / organisation in?; Q4 - How would you best describe your organisation? Please select one.; Q2 - How many people does your company / organisation employ in total?

Survey sample information [3 of 3]

KEY FACTS ABOUT THE SAMPLE SURVEY RESPONDENTS



n: 264
 (1) 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, Prefer not to say: 0
 Source: Eden McCallum Business Outlook Survey Q2 '26: Q5 - Which of the following best describes your role within your organisation?; Q3 - In which country do you live?