THE AI SCOUTING REPORT

Q2 2026: Everyone Adopted AI. Almost Nobody Is Getting Paid for It.

Adoption is now close to universal. Results are not. This quarter's data shows the distance between the two getting wider, and points to what separates the companies pulling ahead.

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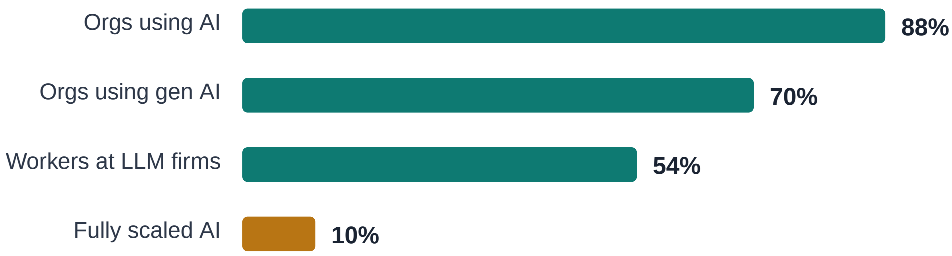
The headline number

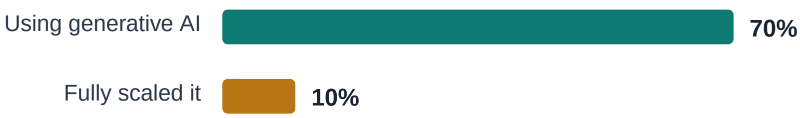
Stanford's 2026 AI Index, published this spring, puts organizational AI adoption at 88%, with 70% of organizations using generative AI in at least one function. The Federal Reserve, tracking the same question from the labor side in an April 2026 note, found that 54% of workers are now employed at firms using large language models. Whichever angle you measure from, AI is inside most companies.



Where AI sits as of early 2026. Fewer than 10% of organizations have fully scaled AI in even one function. Sources: Stanford AI Index 2026; Federal Reserve FEDS note, April 2026.

The gap that matters

Adoption is not the same as advantage. The widely-cited MIT figure from late 2025, that 95% of enterprise generative-AI pilots produce no measurable P&L impact, still describes most companies going into mid-2026. Gartner projects worldwide AI spending will hit $2.59 trillion in 2026, a 47% jump over 2025. Spending is not the constraint. Turning spend into results is.



The distance between using AI and operationalizing it. Source: Stanford AI Index 2026.

Three signals from Q2

1. Agents got capable faster than companies got ready

On the SWE-bench coding benchmark, model performance jumped from 60% to near 100% in a single year. The capability is there. Deloitte found only about 21% of organizations have a mature governance model for autonomous agents, so the readiness is not.

2. The failure incidents are now being counted

The 2026 AI Index documented 362 AI incidents in 2025, up from 233 the year before. And 74% of organizations name inaccuracy as their top AI risk. These are the predictable results of tools reaching production ahead of policy.

3. AI has started to reshape the org chart

AI governance roles grew 17% over the year, and postings for agentic-AI roles surged. The companies pulling ahead are the ones putting someone in charge of AI, not just buying more of it.

What it looks like by industry

The Federal Reserve's April 2026 business data puts professional services at the front of firm-level adoption at 33%, financial services close behind at 30%, and manufacturing lower but growing fast, with AI use in finance functions up 127% year over year.

Financial services & insurance

The longest-running adopters, with mature use in fraud detection, risk, and underwriting. The Q2 pressure point is governance: regulated data plus autonomous agents moves faster than most compliance functions are ready for. The advantage goes to firms that pair speed with a defensible control model.

Healthcare & life sciences

Among the fastest-growing sectors for AI investment, and a leader in agentic experimentation. Documentation, prior authorization, and clinical support are the active areas. The winners built a governance path before scaling, not after.

Manufacturing & construction

High growth in AI investment, concentrated in quality, maintenance, and process optimization. Operations-heavy businesses where value is concrete and measurable, which also means the adoption-to-impact gap is most visible when a pilot never leaves the pilot stage. Workflow redesign is the unlock.

Professional services

Near-universal individual use of AI tools, and the sharpest shadow-AI exposure. The firms pulling ahead treat AI as a managed capability with clear data rules rather than a collection of personal habits.

The read for the next quarter

The competitive question has shifted. It is no longer whether a company uses AI. Almost all of them do. It is whether a company has built the operating model to turn that use into results: someone who owns AI decisions, governance that keeps pace with what gets deployed, and workflows redesigned around the tools rather than bolted onto them.

The companies in that under-10% who have fully scaled AI are not using better models than everyone else. They organized around AI on purpose. That is the whole difference, and it is the work Spej does inside its clients' companies as their AI Office.

Sources

Stanford HAI, The 2026 AI Index Report (March 2026).

Federal Reserve, Monitoring AI Adoption in the U.S. Economy (FEDS note, April 2026).

Deloitte, State of AI in the Enterprise; Gartner AI spending forecast (2026); MIT enterprise gen-AI pilot analysis (2025).