

# The confidence paradox: Leading in belief, cautious in action



## Executive summary

Our research reveals a widening gap between American confidence and American execution, creating a “Confidence Paradox.” While 73% of US executives believe they are leading the global AI race — and indeed, the rest of the world largely agrees with them, the internal metrics tell a more conservative story. The US trails emerging markets in the appointment of Chief AI Officers and remains heavily fixated on operational efficiency (41%) rather than the revenue-generating innovation seen in India or Brazil. The US invented the technology, but its corporate adoption is currently more cautious than its global reputation suggests.

## Key narrative themes

### The efficiency stronghold

While US leadership acknowledges the necessary shift from cost-savings to growth, they have not yet let go of efficiency. The focus remains tightly aimed at margin improvement and cost reduction with 41% of leaders listing operational efficiency as their primary future focus. This suggests that for American companies, the path to growth is being built on a foundation of rigorous optimization first, rather than the “leapfrog” strategies seen in the Global South.

### Low anxiety, high barriers

Unlike the “FOMO” (Fear Of Missing Out) driving high-speed adoption in Asia and Europe, US leaders are relatively calm, reporting the lowest levels of competitive anxiety (49%). However, this lack of urgency might be masking a structural problem: nearly 30% cite a lack of clear AI strategy as a barrier. They aren’t afraid of the competition but they are struggling to define their own internal roadmaps.

### Lagging leadership structures

Despite being the home of Silicon Valley, corporate America is lagging in formalizing AI leadership. Only 43% of organizations have appointed a Chief AI Officer (CAIO), significantly trailing India (67%) and Singapore (64%). This suggests that in many US firms, AI ownership may still be fragmented across IT or operations rather than centralized as a strategic growth function.

### Talent Augmentation

The US remains highly committed to human-centric AI, particularly on the West Coast, where confidence is highest that AI is there to augment, not replace, workers (89%). However, the net increase in roles (36%) is significantly lower than in India or Brazil, indicating a more conservative hiring approach.

## The verdict

The US is the sleeping giant of AI applications. Although the West is currently focused on efficiency and lacks the frantic speed of the East, the foundational work being done now could set the stage for sustainable, long-term dominance — provided that American companies can overcome their strategic ambiguity.

