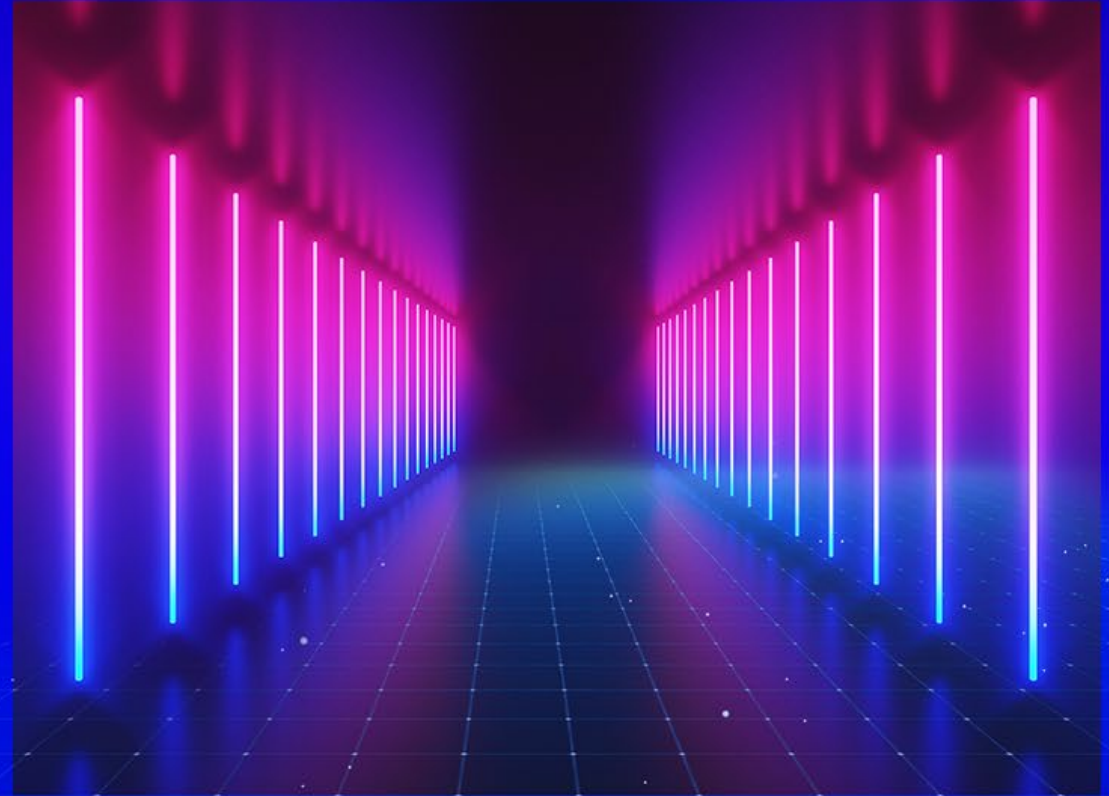




# AI Quarterly Pulse Survey Q4 2025



January 2026

# Executive Summary

## AI investment becomes recession-proof

As AI cements itself as a recession-proof investment, business leaders are demonstrating unwavering commitment: the majority say they will maintain spending even if a recession occurs in the next 12 months, with a projected \$124 million to be deployed over the coming year.

## 2026: The Year Agents Move to Professionalized, Orchestrated Systems

Leaders have moved beyond initial deployments and are professionalizing and preparing to scale agent systems – readying data, investing in infrastructure, and building governance and observability to run multi-agent systems reliably.

## The Great Skills Reset

As enterprises professionalize and prepare to scale agents, the top-of-mind question for every leader is the size, shape, and skills of their workforce of the future.

AI skills command compensation premiums. Workers who invest in AI capabilities can expect significant compensation advantages, with nearly all employers willing to pay more for this expertise.

## Security is a first order constraint

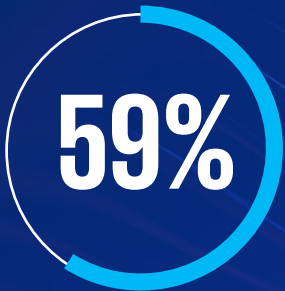
Cybersecurity is the single greatest barrier to achieving AI strategy goals.

Leading teams are embedding privacy by design and segmenting sensitive data to trace and remediate issues early and ensuring auditability across agent actions and tool calls. These safeguards are becoming foundational to scaling agents responsibly in 2026.

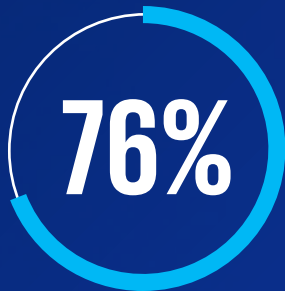


# Q4 2025 Highlights

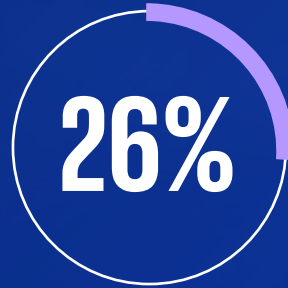
Leaders plan to invest a projected \$124 million in AI over the next year.



of leaders expect measurable ROI within 12 months, **up from 57% in Q3**



of leaders agree that new AI natives are starting to take market share, **up from 14% in Q3**



of organizations have deployed agents, more than double 11% in Q1.

AI agents are becoming more mainstream, leading to a heightened focus on workforce implications and risk mitigation.

Workforce impacts:

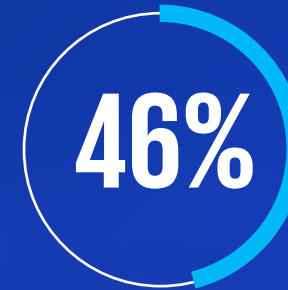
64%

have changed their approach to entry-level hiring.

41%

have changed their approach to hiring experienced workers.

Growing agent resistance:



say employees have a “slight resistance” (low adoption and engagement).

Top challenges in deploying AI:

01. Cybersecurity

02. Data privacy

03. Data quality

# AI investment becomes recession-proof



of leaders agree or strongly agree that new AI natives are already beginning to earn clients and take market share across their industry versus just **14% last quarter**.



say **AI will continue to be a top investment priority**, even if a recession occurs in the next 12 months.

## Organizations are planning substantial AI investments

**\$124 million**

weighted average over the next 12 months, close to the Q3 2025 peak.

**\$130 million** Q3 2025

**\$88 million** Q2 2025

**59%**

**expect to have measurable ROI** in the next 12 months, up slightly from expectations from last quarter (57%).

**59%**

also indicate their organization **will continue to invest in AI regardless of its ability to measure tangible ROI**. This suggests a long-term strategic commitment to AI beyond immediate returns.

**83%**

**62%**

Improved analytics used by C-suite in business decision-making is increasingly a measure of ROI currently, up from 62% to 83% quarter-over-quarter. **Productivity, profitability, and revenue generated remain top ROI metrics, currently.**



# Leaders are professionalizing agents



of organizations have deployed agents, more than double 11% in Q1.

Inconsistent use across the organization is at an all-time high in the last three quarters



Budget constraints



Unclear enterprise strategies



Lack of leadership trust/buy-in



Leaders are converging on platform standards that consistently manage identity and permissions, data access, tool catalogs, policy enforcement, and observability, so each new agent strengthens the system rather than adding fragility.

The complexity wall:



cite agentic system complexity as the top barrier to deployment for two consecutive quarters.

Fragmentation risk:



report inconsistent use across business units, up from 19% in Q2 2025

Foundations gap:



cite lack of organizational infrastructure (more than tripling in the last two quarters), and 32% point to unclear enterprise AI strategy (up from 20% in the last two quarters).



implementation speed



seamless integration with existing systems



reliability



security, compliance, and auditability

# The great skill reset

Agents have already impacted hiring approaches



Leaders say **40%** has substantial expertise in AI-related topics, **up from 8%** two quarters ago.

On a quarterly basis, corporate boards are covering these topics as it relates to AI:

**55%** Hiring/workforce impact

**52%** Regulatory uncertainty

**48%** Risk management processes/governance

**45%** Trust in the accuracy and fairness of outputs

A notable trend is the changing perception of AI agent-human collaboration.

**44%**

now expect AI agents to take lead roles in managing specific projects with human team members over the next 2 to 3 years.

**76%**

This is a major shift from Q3 2025, where 76% expected humans to primarily manage and direct AI agents.

New roles are emerging, and skills are evolving, the most anticipated emerging roles are:

**71%**

AI Prompt Engineer

**59%**

AI Performance Analyst

**58%**

AI Trainer or Data Curator

**76%**

The majority of leaders (**76%**) would pay up to **10% more** for candidates who demonstrate strong AI skills versus those who don't. **22%** would be willing to pay **11-15% more** in compensation.

**63%**

For entry-level employees, the most sought-after skills due to AI agents are adaptability and continuous learning

**61%**

and critical thinking and problem-solving

**46%**

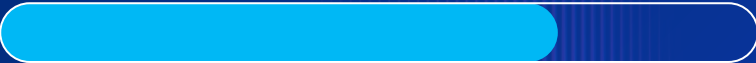
of employees show a small degree of resistance

**39%**

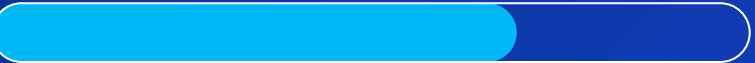
of employees have slightly or significantly adopted agents

# Heightened focus on cyber and risk mitigation

**74%** Risk considerations, particularly data privacy and cybersecurity, are overwhelmingly cited as the biggest challenge to demonstrating AI ROI



**71%** and a key factor for reevaluating GenAI investment strategy

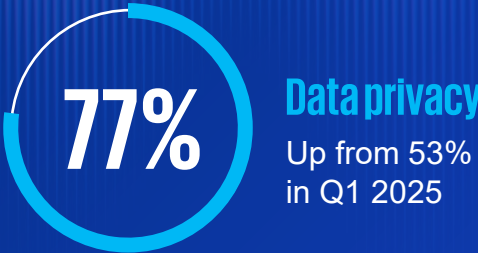


Cybersecurity is not just a concern but a top investment priority. Half of leaders planning to allocate between

**\$10-50 million**

in the coming year to secure agentic architectures, improve data lineage, and harden model governance.

## Greatest barriers to meeting the goals of AI strategies



## Concerns about specific AI-related cybersecurity threats are high



**72%** of organizations are prioritizing deploying AI agents developed by trusted tech providers as a risk mitigation measure – since Q4 2024 this figure has more than tripled (23%).

Another 60% are preventing AI agents from accessing sensitive data without human oversight.





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