



KPMG 2026 Annual US Technology Survey

January 2026

Research methodology

USA

Sample size	Seniority	Full range of emerging technologies considered in the results:	Fieldwork was conducted within July and August of 2025
648	50% C-suite 50% C-1+C-2		
Company size (annual rev)	Average workforce size	US high performer group	A group of respondents representing 13 percent of US tech professionals surveyed (85 people), with high tech maturity, high process maturity and reporting significant financial value return on their digital tech investments.
\$100m and over	11,303 employees		
Sector counts (net groupings)		Full sector list	
Automotive  6%	Consumer and retail  15%	• Aerospace and defense manufacturing	
Healthcare and life sciences  6%	Energy  15%	• Automotive, logistics and transport Consumer and retail	
Government  4%	Financial services  20%	• Energy and extractives Financial services Government and public sector Healthcare and life sciences Industrial manufacturing	
Industrial manufacturing  15%	Tech and telecoms  6%	• Web3	
		• Advanced simulation/digital twins	
		• Post-quantum cryptography	

Executive summary

The gap between ambition and reality

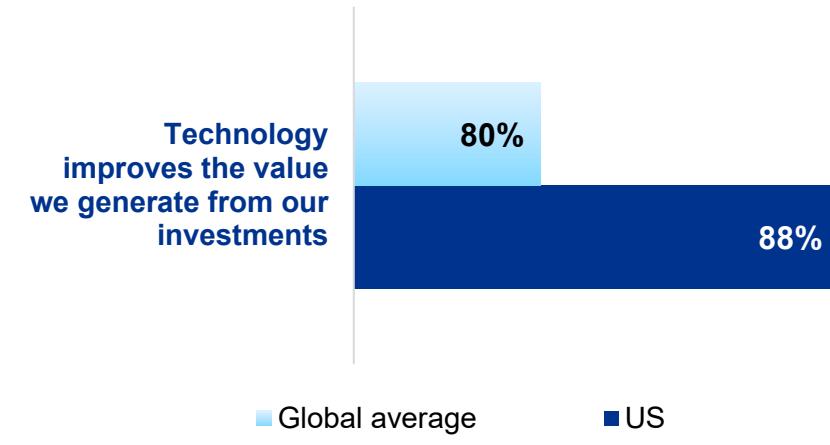
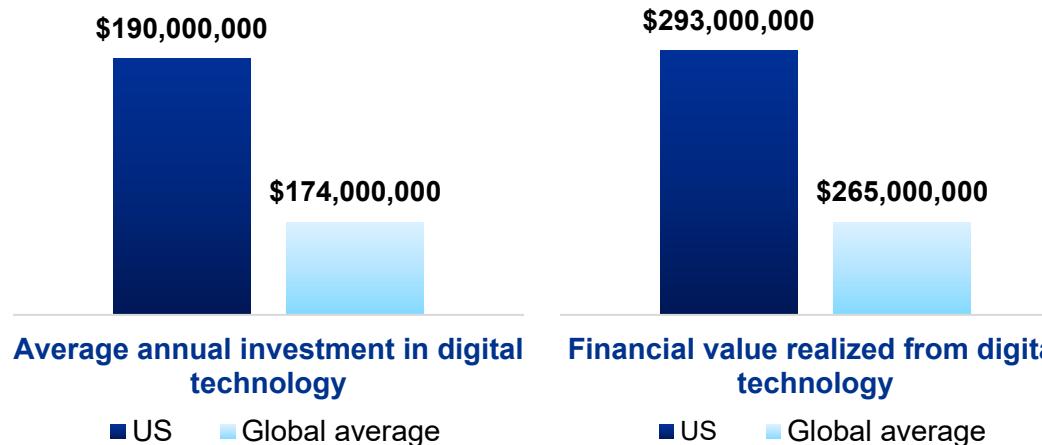
In this landscape of unrelenting disruption and competition, it is not enough to just invest in new technologies and hope for long-term growth. This year's data indicates there is a gap between ambition and reality in tech implementation journeys.



The US' digital transformation journeys are outpacing the global average financially

The US is investing more in tech than the global average, and has achieved more financial value from digital transformation in the last 12 months.

Approximate annual investment and total financial value realized from tech investments



Q: Thinking about your organization's technology investments, specifically investments in digital technology, please estimate the following in USD (\$):
Base: All answering: Global average=2748, US=648

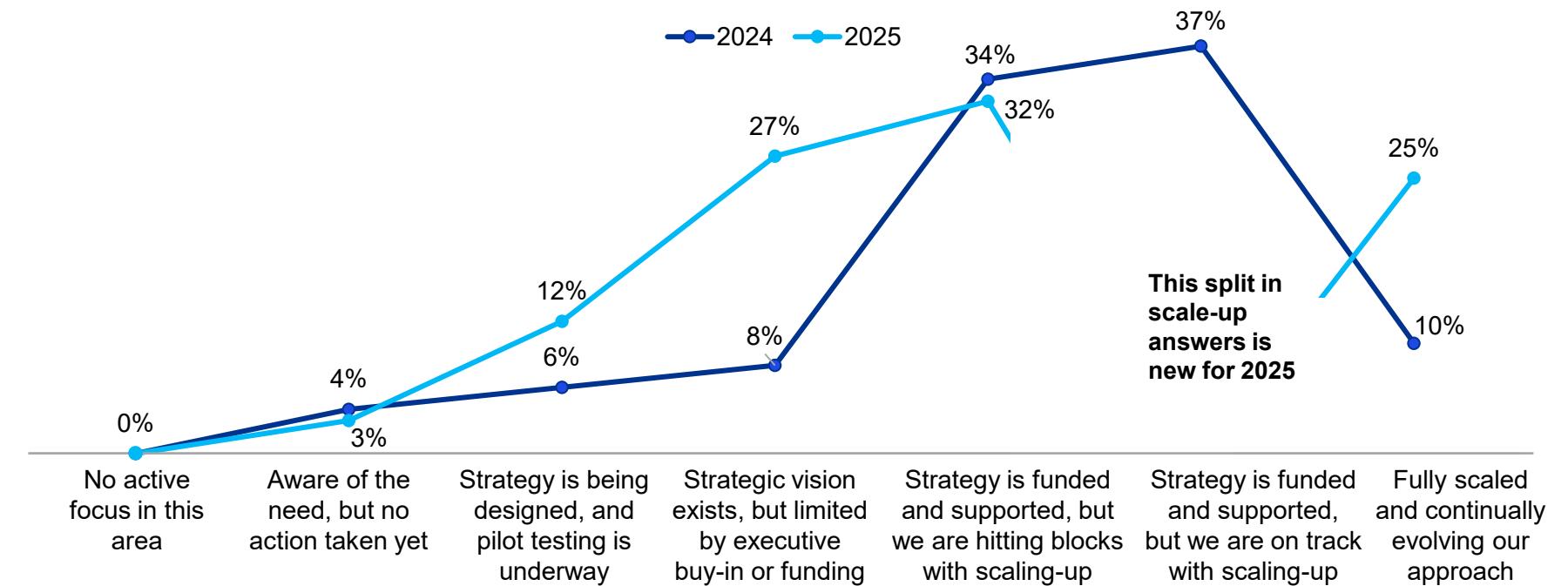
Q6: How often, if at all, do the following occur within your organization? Frequently
Base: All answering: Global average=2748, US=648

Despite high confidence, there is a gap between ambition and actual implementation progress

Just 10% of executives report that their emerging technologies are fully scaled, down from 25% in 2024.

Full range of emerging technologies considered in the results:

- AI and automation
- Data and analytics
- Cybersecurity
- XaaS technologies
- Edge computing
- Modern delivery
- VR/AR/XR/Spatial computing
- Web3
- Advanced simulation/digital twins
- Post-quantum cryptography

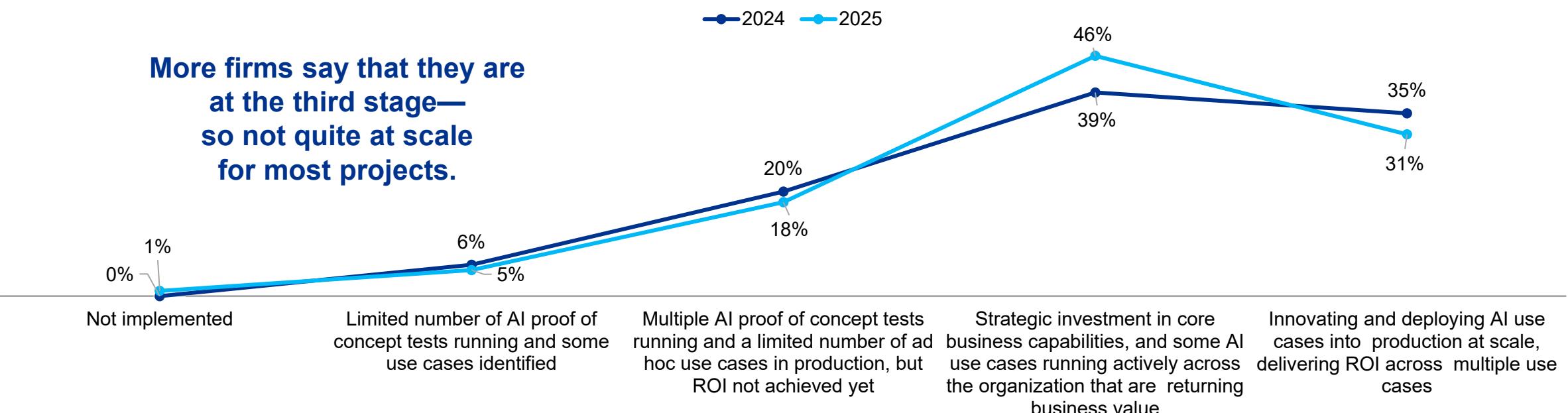


Q5: For each of the following technologies, how would you describe your organization's position today Base: All answering: 2024=400, 2025=648

Tech implementation progress of US organizations slipped year over year

This year slightly fewer US firms say that they are at the top stage of AI use case implementation (AI cases running at scale) compared to last year.

More firms say that they are at the third stage—so not quite at scale for most projects.

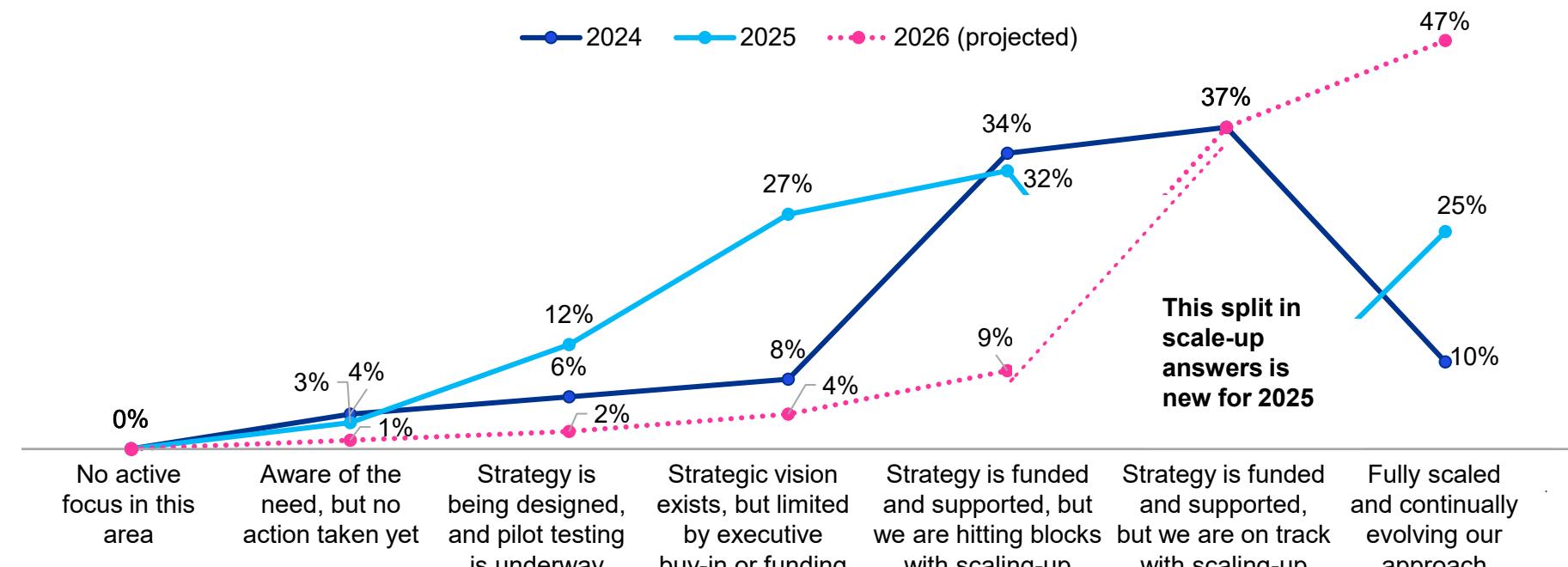


Q: Which of the following best describes your organization's current level of AI adoption, and where do you expect to be in 12 months? Today Base: All answering: Global average=2748, US=648

And this ambition vs reality gap will continue to persist

A story of hype, hope and hurdles: Just 25% fully scaled today, but 47% anticipated for 2026

Where would you describe your organization's position across each of the following areas? (US only)



Q5: For each of the following technologies, how would you describe your organization's position today Base: All answering: 2024=400, 2025=648

Cost threats and IT glitches are seen as top hurdles

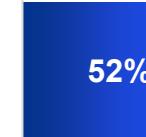
In our aim to be as cost-effective and fast as possible, our tech programs make trade-offs that negatively impact other areas, such as security, scalability and data standardization



The cost of fixing technical debt prevents us from making investments in new technology programs



We are unable to secure adequate business sponsorship/funding to support tech programs



Q: How often, if at all, do the following occur within your organization?
Base: All answering: Global average=2748, US=648

While glitch rates have dropped YoY, the US is more likely to be seeing weekly glitches from tech than the global average. Companies are working through their glitches but flaws in foundational enterprise IT systems do still disrupt 'business as usual' on a weekly basis for many

"Flaws in our foundational enterprise IT systems disrupt 'business as usual' on a weekly basis"

Financial value realized from digital technology



■ 2024 ■ 2025

Q: Please indicate whether you agree or disagree with the following statements.
Base: All answering: 2024: Global average= 2450, US=400. 2025: Global average=2748, US=648

Cost concerns have hindered emerging tech investments to date but budgets are due to go up

Cost-efficiency pressures have previously led some organizations to underinvest in new and emerging technologies. But looking ahead budgets are due to go up. The US is more likely than average to be increasing budgets with some emerging tech being a key priority.

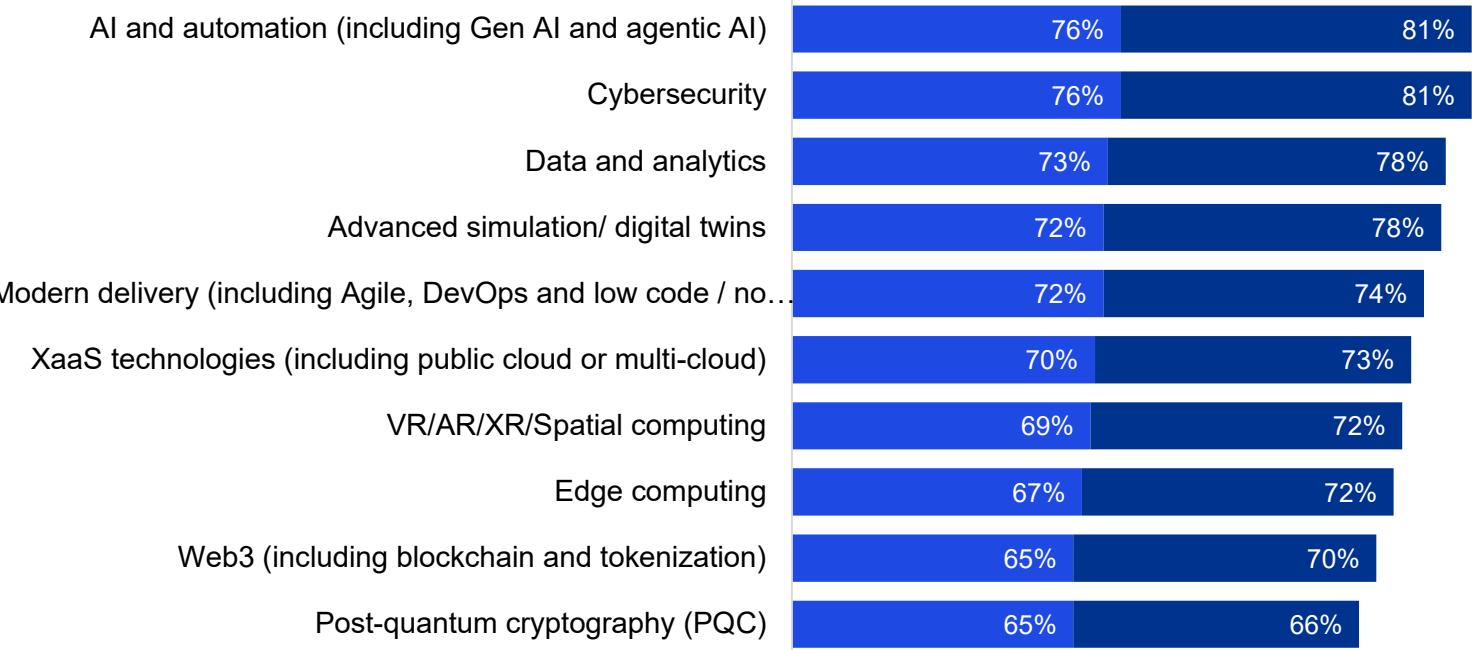


Base: Those actively focusing on tech in next 12 months: Total=2748, US=648

Q: Of the following technologies, which is your organization currently prioritizing and investing in to support its ambitions over the next 12 months?
- Budget increase SUMMARY

Hypothesis 12

The majority of US organizations are increasing their tech budgets over the next 12 months.



■ Global average

■ US

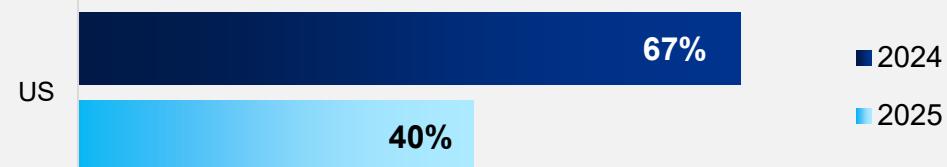
Talent gaps are showing signs of narrowing and workforces and their budgets are not as thinly stretched this year

Talent gaps are showing signs of narrowing

"We have great ideas around how we would like to digitally transform over the next 24 months, but we don't have access to the talent we need to bring these plans to life"



"Some of our employees are feeling left behind in the ever-changing tech landscape"



Base: All answering: US 2025=648, US 2024=400, Global average 2024=2450, Global average 2025=2748

Q: Please indicate whether you agree or disagree with the following statements.
Q: To what extent do you agree or disagree with the below statements on how AI is impacting your workforce?

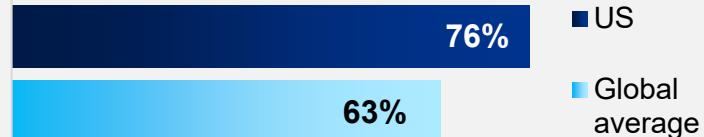
"It often feels like we don't have the budget to keep up with the pace of technological change" - Disagree



Base: All answering: US 2025=648, US 2024=400, Global average 2024=2450, Global average 2025=2748

US workforces trust AI decisions more than average

Employees trust the outputs of AI systems enough to inform their strategic or operational decision making



Base: All answering: Global average=2748, US=648

Q16: To what extent do you agree or disagree with the below statements on how AI is impacting your workforce?

The US is adopting a slightly more protectionist stance than the global average

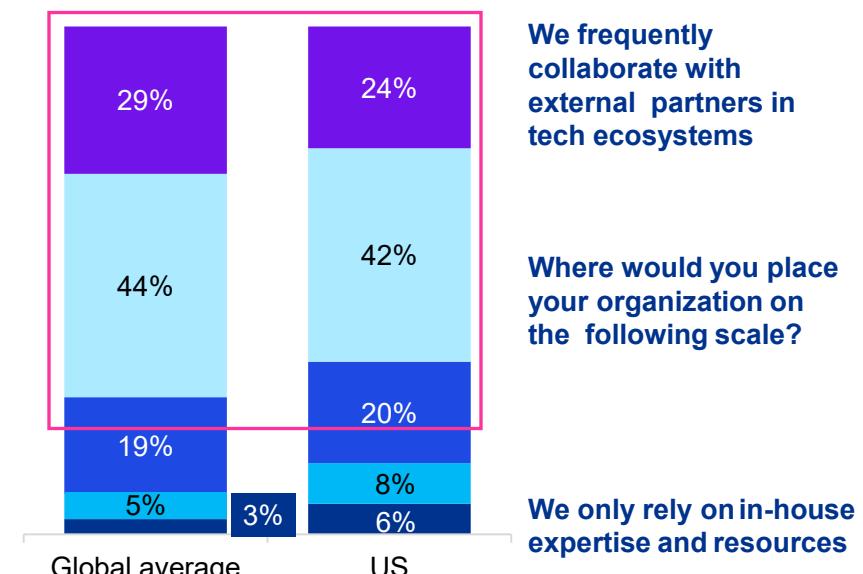
Tariff and regulatory uncertainty likely driving protectionism

Unlike the global average, the US prioritizes applying greater scrutiny to the location of cybersecurity partners in their top three actions they are likely to pursue over the next 12 months. For the global average this falls just outside their top three.

	Global average	US
1	Improve data flows and technology infrastructure to support scenario planning and enhance decision-making agility	Improve data flows and technology infrastructure to support scenario planning and enhance decision-making agility
2	Hire more onshore technology talent	Hire more onshore technology talent
3	Enhance data sovereignty audits across our partnership ecosystem	Apply greater scrutiny to the geographic location of cybersecurity partners in light of geopolitical risks

Q: Which of the following actions is your organization likely to pursue over the next 12 months as part of its digital transformation efforts, in response to external macro environment changes?

While the majority of US organizations are collaborating with external partners, they are 10 percentage points less likely than the global average to be doing so. US organizations are six percentage points more likely than average to prefer leaning on in-house expertise.



Base: All answering: Global average=2748, US=648 Hypothesis 15

US orgs have a stronger than average appetite for agentic AI but still have their concerns



of US organizations are already investing into building agentic AI into our systems, as they plan to move to a hybrid of human and digital workforce. This 5PP+ ahead of the global average.



say managing AI agents will become an important skill within the next five years.

US top AI risks

1	Cyber attacks	
2	Regulatory and compliance risks	

Base: All answering: Global average=2748, US=648

Q: To what extent do you agree or disagree with the below statements on how AI is impacting your workforce? – Agree

Q: Please review the following AI-related risks and rank the top three that your organization is most concerned about today.

Hypothesis 17

Organizations are experimenting with quantum capabilities

Leading organizations are planning ahead for advances in post-quantum cryptography (PQC), with some beginning to consider quantum computing as well.

In general, the majority of US organizations feel content with their security defences in relation to the threats posed by quantum computing.

Are you worried that your organization is falling behind in its preparation for the threats posed by quantum computing and its implementation of Post-Quantum Cryptography?



The US has a higher proportion at the top AI stage than the global average, and the US has strikingly lofty ambitions about the progress they can make in 2026-2027

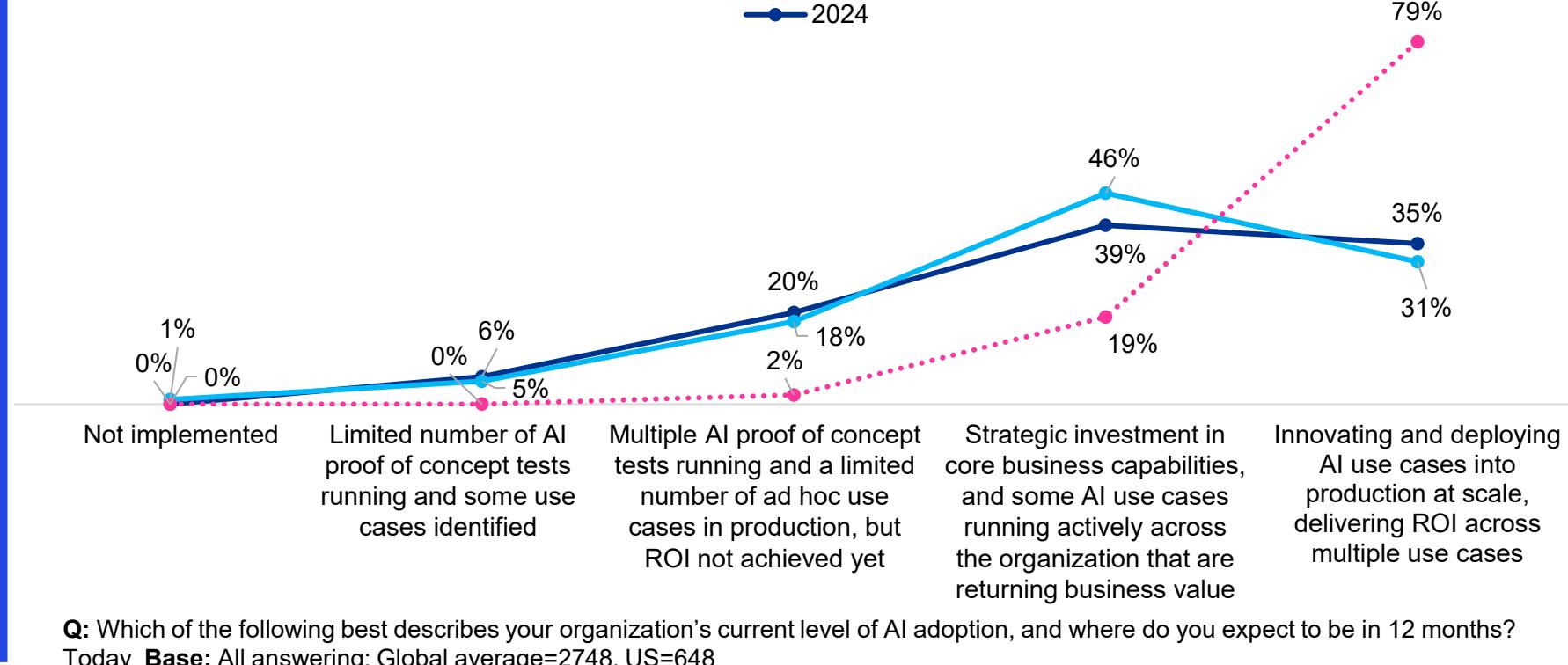
100%

Of high performing organizations in the US is evolving their business models and industry ecosystems with AI to reimagine value streams and operating models.

When it comes to the rest of the pack, there is a portion that is not following suit. 12% of non-leaders are **not** evolving their business models with AI.

92%

of US organizations think that by end of 2026, AI will shift from an efficiency enabler to a revenue-driving innovation—slightly higher than the global average (3PP).





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