AI Quarterly Pulse Survey
Q1 2026

March 2026

Executive summary

Investment projections nearly double year-over-year

Capital continues to flow into AI, with organizations projecting average AI spending of $207 million over the next 12 months, nearly double figures from the same period last year. AI's potential value is no longer in question. However, realizing that value depends on how effectively and securely organizations can reengineer work at enterprise scale.

AI agent deployment reaches new levels

Today, more than half of organizations are actively deploying AI agents. As AI agents move deeper into day-to-day operations, their most immediate impact is how work gets coordinated across the enterprise.

AI agents are facilitating collaboration across functions by automating workflows, routing information and supporting joint decision-making.

The great skills reset

AI agents deliver the most value when people remain firmly in the lead, setting intent, exercising judgment and retaining accountability. Employee response is beginning to align, with more than half reporting some level of adoption or integration of AI agents.

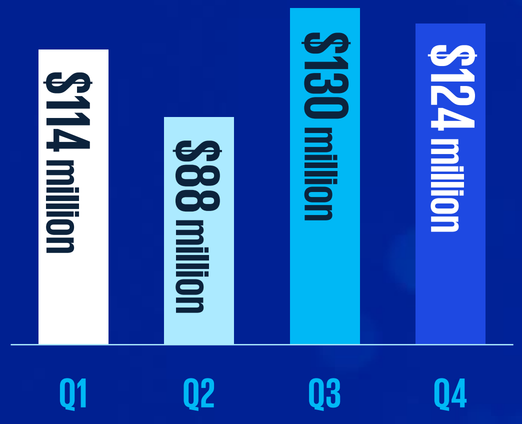
Resistance is driven primarily by skills gaps and concerns about job security.

Governance is a prerequisite for scale

The vast majority of leaders say data security, privacy and risk considerations will influence their AI strategies over the next six months.

AI agent deployment is also bringing questions of trust, control and accountability to the forefront – most organizations now require human validation of AI agent outputs.

ROI and investment



Average projected investment over the next 12 months jumps sharply to **$207 million**

Nearly twice the projection in Q1 of last year. **2x**

Top investment categories between $10 to $49 million include:

- **61%** data and analytics
- **63%** cybersecurity
- **64%** customer experience

Difficulty scaling use cases and employee skill gaps are top barriers to demonstrating ROI.

65% In Q1 from **33%**
Difficulty scaling use cases

62% In Q1 from **25%**
Skills gaps

59% In Q1 from **34%**
Difficulty quantifying indirect or long-term benefit

58% In Q1 from **74%**
Risk considerations such as data privacy, cyber

79% say AI will continue to be a top investment priority, even if a recession occurs in the next 12 months.

62% Up from 59%
Have either achieved measurable ROI or expect it in the next 12 months.

83%
Improved analytics from the C-suite remains a top ROI metric for the second quarter.

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AI Agent deployment crosses the tipping point

Experimenting at

14%

Piloting at

30%

Down from

62%

Deployment* is at

54%

40% scaling/deploying

6% developing multiple agent systems

9% orchestrating

Percentages do not equate to 55% due to rounding.

AI agents are facilitating collaboration across functions:

73% Automating workflows that span multiple functions

53% Routing information or decisions between teams

51% Providing shared knowledge bases or unified dashboards

The great skill reset

Upskilling and reskilling employees, recruiting for new roles, and redesigning job roles are **top strategies** leaders are pursuing to enable an AI workforce:

- **87%** Upskilling/reskilling current workforce
- **68%** Recruiting for new roles (e.g., AI architects, prompt engineers)
- **55%** Redesigning job roles
- **39%** Managed services/outsourcing
- **17%** Acquihire

40% Up from 15%

Employee resistance dropped quarter over quarter with 40% now saying that employee response varies (some embracing with others resisting).

Another **55%** **are seeing slight or significant adoption** (employees beginning to accept and integrate agents in their work).

AI agent resistance from employees is largely due to

76% skill gaps

67% concerns about job security

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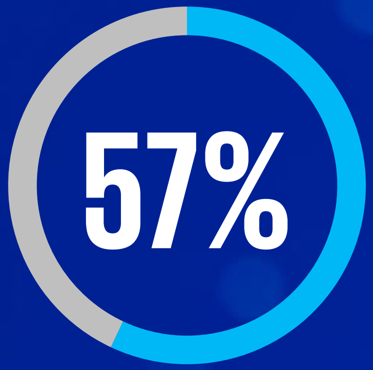
The great skill reset



expect humans to primarily manage and direct AI agents in the next two to three years.

45%

of leaders are willing to pay **11% to 15%** more for strong AI skills

22%

about double last quarter

83% Adaptability and continuous learning

outweigh

71% technical or programming abilities

as it relates to skills that entry-level employees need to work with AI agents.

64% say agents have already changed their approach to entry-level hiring

71% for experienced hires

Governance becomes a prerequisite for scale

44%

Up from **32%**

Leaders cite **cyber and employee misuse** as the most difficult society-wide challenge with AI between now and 2030.

Data security, privacy, and risk concerns

are the top factor influencing AI strategy in the next 6 months for 91% of leaders.

When it comes to managing agent risk in the next 6-12 months:

57% are taking a **"human-in-the-loop"** approach where a human validates outputs but does not oversee each agentic action or decision.

44% are looking to **deploy AI agents** developed by trusted tech providers or have identified high-risk use cases where autonomous agent decision-making is not allowed.

43% are **building controls** into agents, along with clear procedures for monitoring and evaluation; another 43% have **identified high-risk use-cases** where autonomous agent decision-making is not allowed.

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