



# AI Quarterly Pulse Survey Technology Q1 2026

April 2026



# Executive summary

## Investment meets ROI pressure

AI remains a top investment priority for 96% of tech leaders—even amid economic uncertainty—with average projected spend of \$294M over the next 12 months. The focus has shifted from whether to invest to how to scale responsibly. 79% have or expect to achieve measurable ROI in the next 12 months, but persistent challenges around skills gaps, scaling use cases, and demonstrating long-term value mean the work is far from done.

## AI agent deployment matures

As the architects of the digital world, the tech industry is leading the way on agentic creation and deployment. 80% of tech organizations are actively deploying AI agents today, with most focused on scaling and operationalizing them across workflows. Having built these systems, tech companies are well-positioned to capture early enterprise value—using agents to automate processes, route information, and support decision-making across functions.

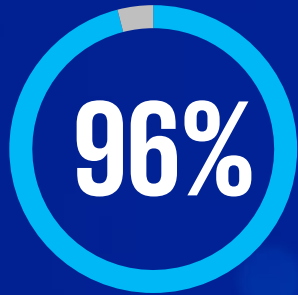
## The great skills reset

As agents scale, human oversight remains critical to realizing value. Tech leaders expect people to manage and direct agents for the foreseeable future, and 51% of employee sentiment reflects adaptation rather than resistance. Where friction exists, it ties back to skills gaps (94%) and job security concerns (80%). Upskilling, recruiting for new roles, and role redesign are the primary levers organizations are pulling.

## Governance is a prerequisite for scale

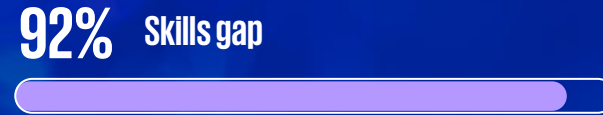
Greater agent autonomy is sharpening focus on trust, control, and accountability. Data security, privacy, and risk top the list of strategic priorities for the next 6–12 months. In response, tech organizations are implementing human-in-the-loop validation, closer oversight for high-risk decisions, and tighter limits on autonomous access to sensitive data—treating governance not as a constraint, but as a condition for sustainable scale.

# ROI and investment



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

## Top barriers to demonstrate ROI related to AI:



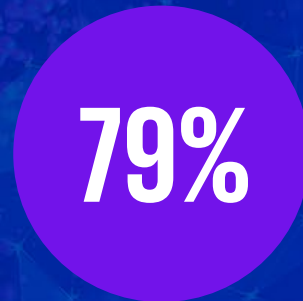
Regulatory uncertainty and rising costs are the top factors that influence AI investment strategy.



Over the next 12 months, Tech respondents project to invest in AI an average of

**\$294**  
million

~\$90M above the overall KPMG US Q1 AI Quarterly Pulse (\$207M).



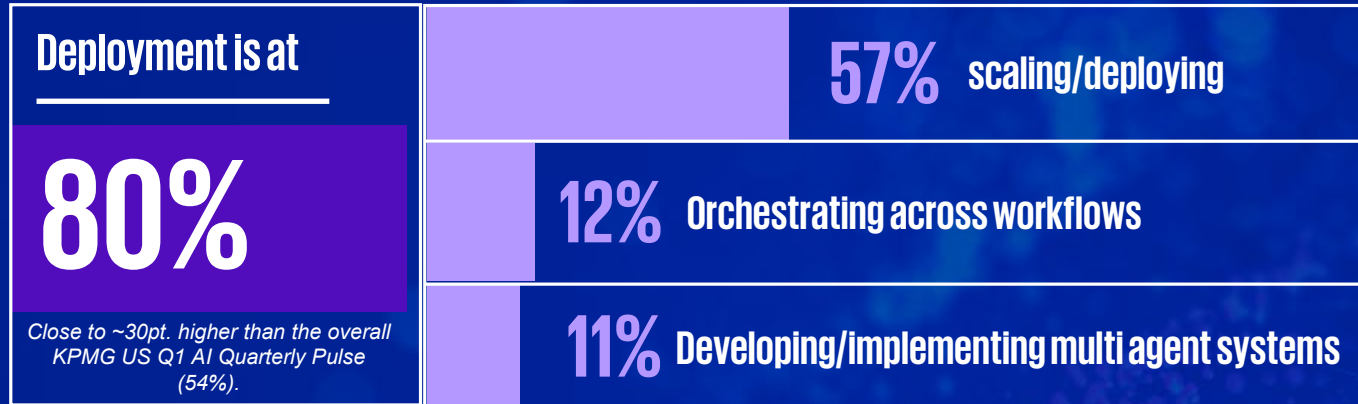
Have either achieved measurable ROI or expect it in the next 12 months.



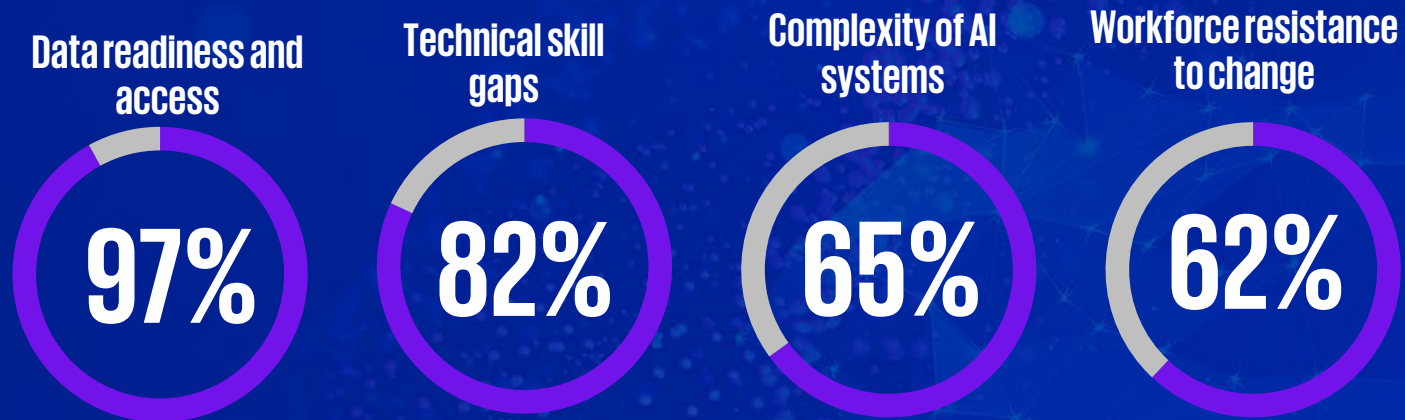
Say new AI natives are already beginning to earn clients and take market share in tech.



# AI Agent deployment crosses the tipping point



## Top challenges to deploying AI agents to date:



## AI agents are facilitating collaboration across functions:

**86%** Automating workflows that span multiple functions



**71%** Routing information or decisions between teams



**68%** Supporting joint decision-making



# 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:

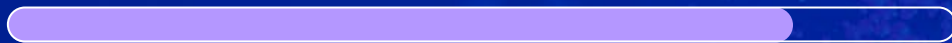
**100%** Upskilling/reskilling current workforce



**88%** Redesigning job roles



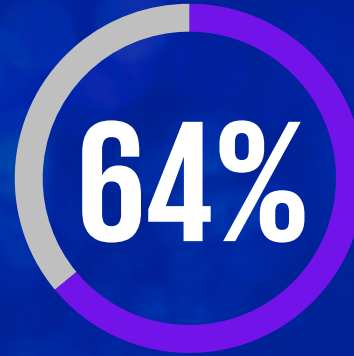
**87%** Recruiting for new roles  
(e.g., AI architects, prompt engineers)



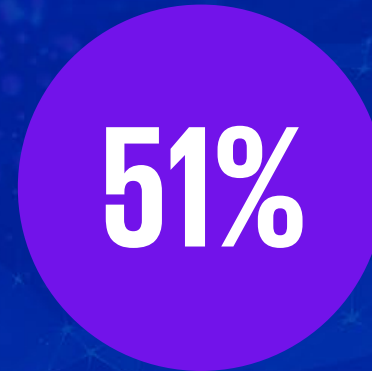
**38%** Managed services/outsourcing



**23%** Acquire



Tech companies have concerns about employee adoption, with **64%** seeing it as one of the biggest challenges to their AI strategy in the next 12 months.



Just over half of tech employees show slight or significant adoption of AI agents (employees beginning to accept and integrate agents in their work).

AI agent resistance from employees is largely due to

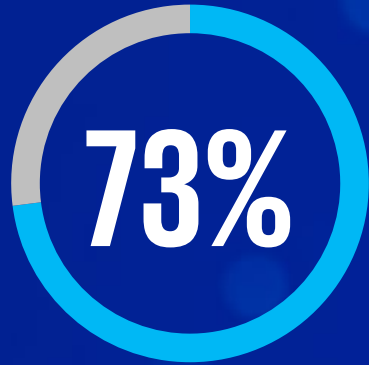
**94%**

skill gaps

**80%**

concerns about job security

# The great skill reset



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

**52%**

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

**29%**

are willing to compensate **6% to 10%** more.

**95%**

Adaptability and continuous learning

outweigh

**65%**

technical or programming abilities

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

**84%** say agents have already changed their approach to entry-level hiring

**100%** for experienced hires

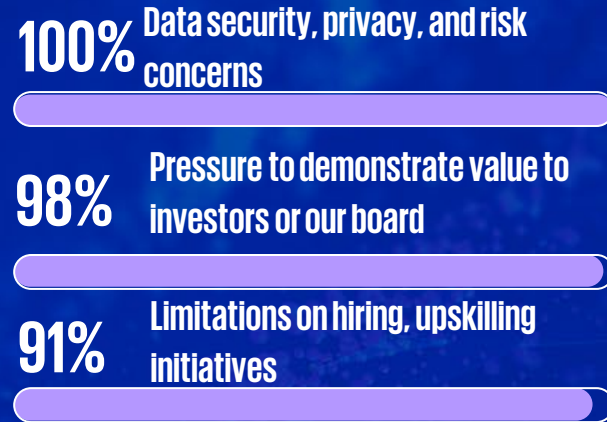
# Governance becomes a prerequisite for scale

70%

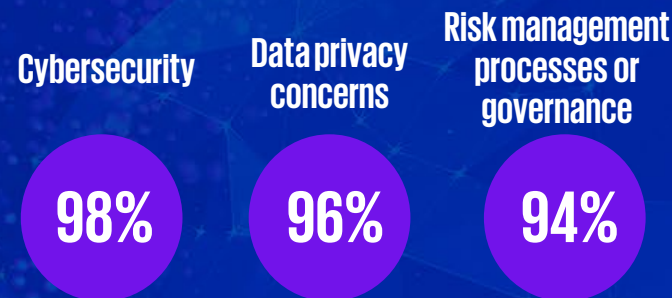
Leaders cite misuse of AI by bad actors, including cybersecurity and misinformation, as the most difficult society-wide challenge with AI between now and 2030.

*This is 26pt. higher than the overall KPMG US Q1 AI Quarterly Pulse.*

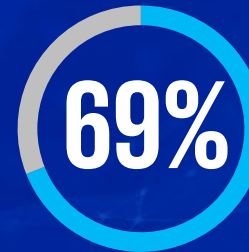
## Top factors influencing AI strategy for the next 6 months:



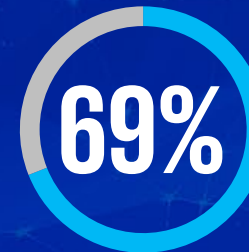
## When it comes to how often boards cover AI-related topics quarterly:



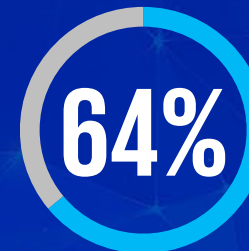
## When it comes to managing agent risk in the next 6-12 months:



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



are building controls into agents, along with clear procedures for monitoring and evaluation.



have identified high-risk use-cases where autonomous agent decision-making is not allowed; another 62% are not allowing AI agents access to sensitive data without human oversight.



**Some or all of the services described herein may not be permissible for KPMG audit clients and their affiliates or related entities.**

Learn about us:



[kpmg.com](https://www.kpmg.com)

The information contained herein is of a general nature and is not intended to address the circumstances of any particular individual or entity. Although we endeavor to provide accurate and timely information, there can be no guarantee that such information is accurate as of the date it is received or that it will continue to be accurate in the future. No one should act upon such information without appropriate professional advice after a thorough examination of the particular situation.

© 2026 KPMG LLP, a Delaware limited liability partnership, and its subsidiaries are part of the KPMG global organization of independent member firms affiliated with KPMG International Limited, a private English company limited by guarantee. All rights reserved.

The KPMG name and logo are trademarks used under license by the independent member firms of the KPMG global organization.