AI Quarterly Pulse Survey

Technology

Q2 2026

June 2026

Executive summary

The economics of AI

Tech leaders are working to prioritize the data infrastructure and workforce capabilities needed to fully operationalize scaled AI.

With investment levels holding steady, organizations are sharpening their focus on improving customer experience, expanding access to lower-cost models, and unlocking new revenue opportunities.

AI agent orchestration expands

Tech leaders are advancing how AI agents are used, shifting from standalone applications to more coordinated, enterprise-level orchestration. With improved data readiness and less workforce resistance to AI, organizations are moving toward connecting activities across teams, systems, and decision points.

Organizations are using agents to align shared goals, enable more integrated decision-making, and automate work that spans functions.

Aligning AI usage to meaningful outcomes

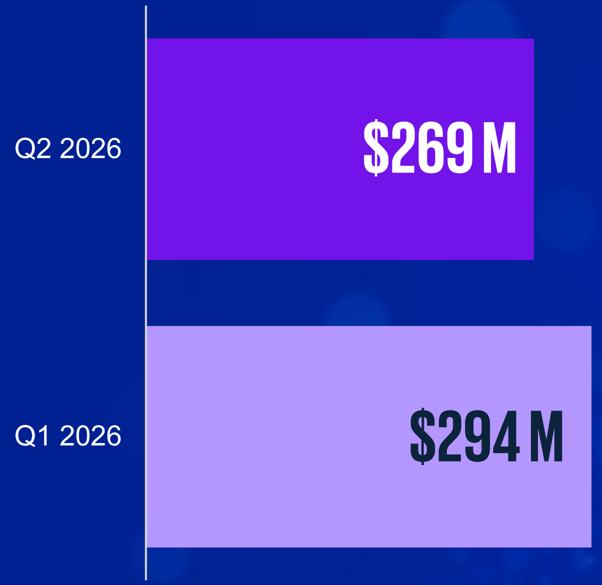
Employee adoption remains high across the tech sector with leaders seeing AI fluency as a key to future success.

Tech leaders identify skills gaps and concerns about job security as the leading two causes of employee resistance to AI agents.

Top-down vision, shared execution

While accountability for AI-informed decisions is spread across the C-suite, tech leaders recognize their CEO actively owns AI as a strategic business priority. This accountability at the top of organizations has generated heightened visibility in AI operating costs.

Investment and strategy



Average projected investment in AI over the next 12 months remains high at

$269 million

$67M higher than the broader Q2 AI Pulse Survey.[1]

Top investment categories include:

- **57%** Cybersecurity
- **54%** Data and analytics
- **44%** Purchasing AI technology

79% agree or strongly agree their organization has the ability to future-proof its AI strategy (e.g., adapt to new technologies and regulations, scale AI responsibly, and avoid getting locked into specific tools or vendors).

77% agree or strongly agree their organization's CEO actively owns AI as a strategic business priority, with clear accountability for AI-related outcomes across the organization.

Top factors influencing AI strategy in the next 6 months include:

- **99%** Data security/privacy/risk concerns
- **92%** Need to improve customer experience and engagement; *a 25 ppt increase QoQ*
- **90%** Access to lower-cost, high-fidelity technology/large language models; *a 40 ppt increase QoQ*
- **88%** Balancing AI scaling and carbon emissions/sustainability impact
- **87%** Opportunity to identify new revenue opportunities; *a 20 ppt increase QoQ*

KPMG

The KPMG Quarterly AI Pulse Survey — Industries captures insights from 100 U.S.-based C-suite and senior business leaders in each of three industries: Banking, Technology, and Asset Management and Private Equity, all from organizations with annual revenues of $1 billion or more. The survey was fielded from May 4 to June 2, 2026.

AI agent deployment and trends

AI agent deployment in Q2: 67%

Scaling AI agents across multiple functions **44%**	Developing/implementing multi-agent systems / agentic AI systems **5%**
Orchestrating multiple AI agents across workflows **19%**	Exploring the possibility of using AI agents **2%**
	Piloting AI agents **31%**

The top ways AI agents are facilitating collaboration across functions within organizations include:

- **74%** Aligning shared goals, KPIs, and success metrics across functions
- **57%** Supporting joint decision-making (e.g., shared insights, recommendations)
- **42%** Routing information or decisions between teams

Biggest challenges to deploying AI agents:

- **75%** Data readiness and access
- **67%** Complexity of agentic systems
- **31%** Human oversight skills (e.g., human-in-the-loop judgment and escalation skills)
- **30%** Workforce resistance to change
- **21%** AI cost and economic literacy skills (e.g., understanding usage-based AI costs such as token or inference costs)

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Workforce agent collaboration and upskilling trends

Only 2% of leaders report employee resistance to AI agents, while 30% report a mixed response and 68% indicate some level of adoption.

30% Mixed response

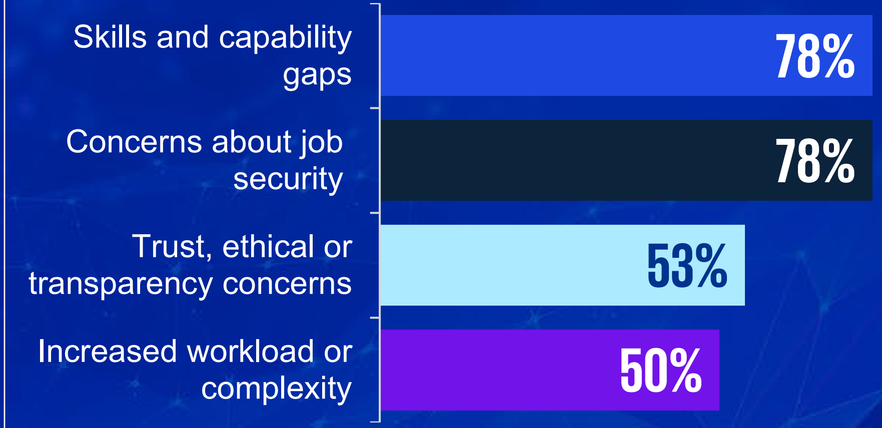
2% Slight resistance

0% Significant resistance

Employee adoption of AI agents remains high at:

68%

AI agent resistance from employees is largely due to:



49%

of leaders say their organization expects increasing levels of AI fluency, and roles will change for employees who do not adopt these capabilities over time.

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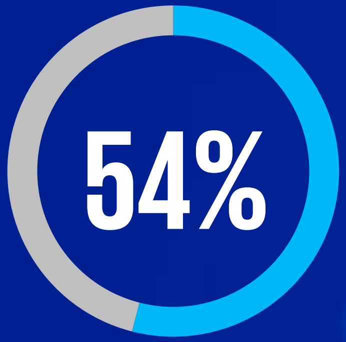
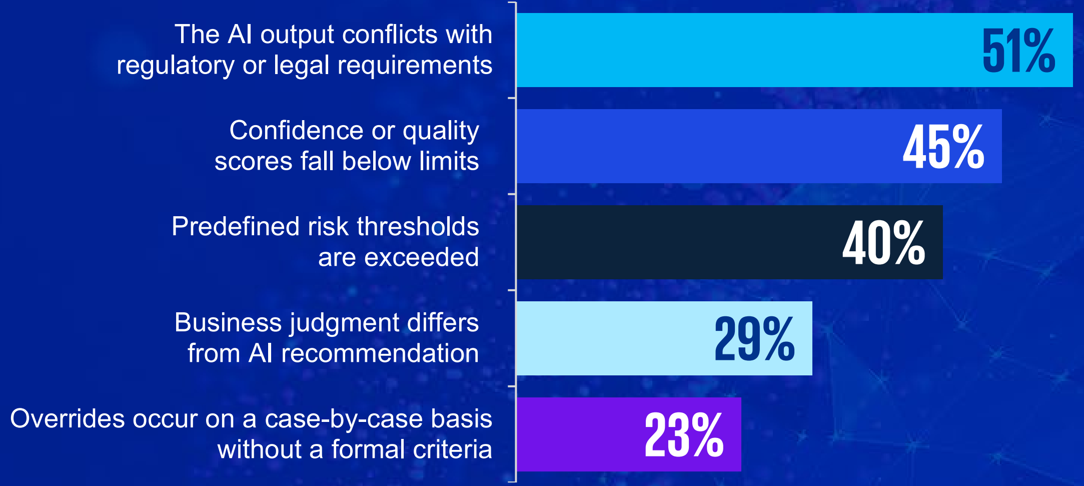
Governance and cost visibility



say operating costs of AI systems are **fully visible and actively monitored** today.

Triggers to override an AI output:



Accountability for AI-informed or executed business decisions sits with C-suite:

61% A named C-suite executive (CIO, CAIO, COO, etc.)

25% CEO or executive committee

6% Centralized AI governance/ risk committee

5% Shared accountability across multiple roles/teams

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