



AI Quarterly Pulse Survey

Technology Q3 2026

October 2026



Investment and strategy

92% of tech leaders report meaningful business value from their AI initiatives.

Those leaders report significant value in the following areas:

99% Productivity



97% Strategic decision making



74% Financial value



74% Customer experience and quality



57% Employee experience and quality



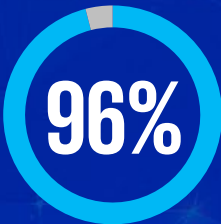
Tech CEOs are actively owning AI as a strategic business priority, with clear accountability for AI- related outcomes across their organization:

77% ▶ 92%
Q2 2026 Q3 2026

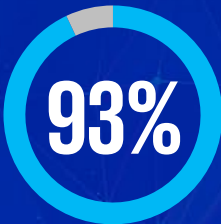
81% ▶ 57%
Q2 2026 Q3 2026

The emergence of AI-native companies entering the competitive landscape has **decreased 24 ppt** as a pressure influencing AI strategy for tech companies within the next 6 months.

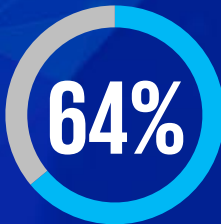
As AI moves deeper into day-to-day operations, organizations are also becoming more **disciplined** in how they **manage AI** usage costs.



include cost reviews in AI approval processes



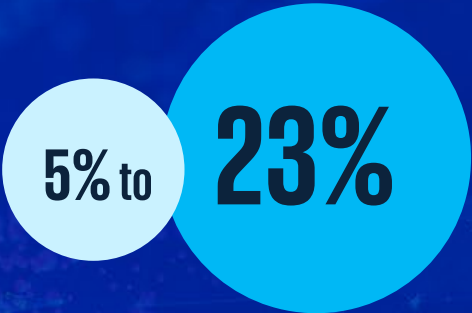
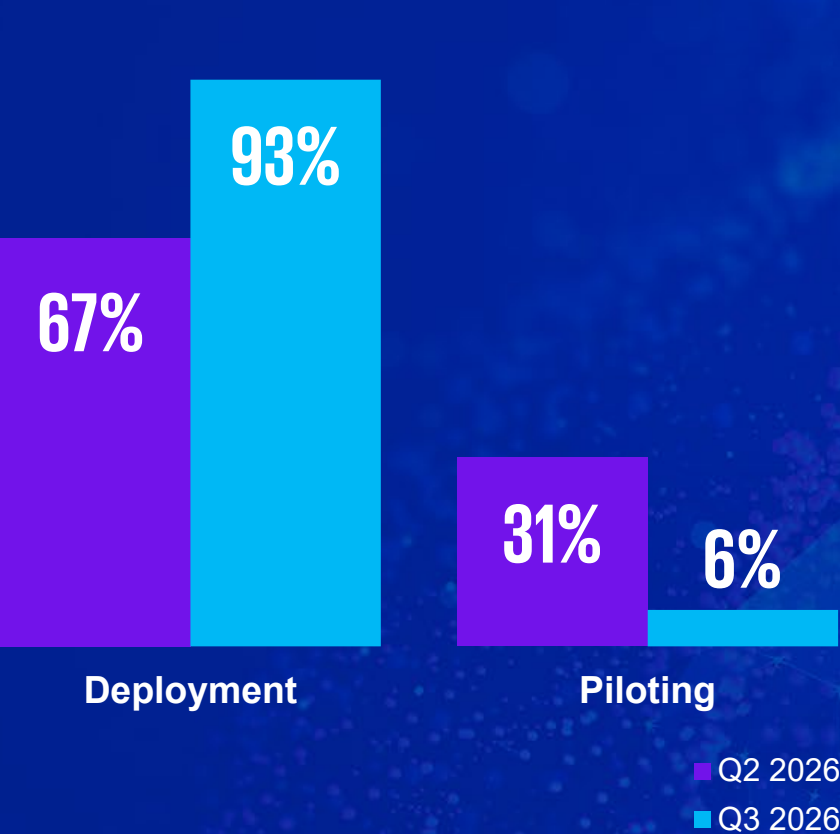
use AI cost monitoring dashboards



use architecture or prompt design standards

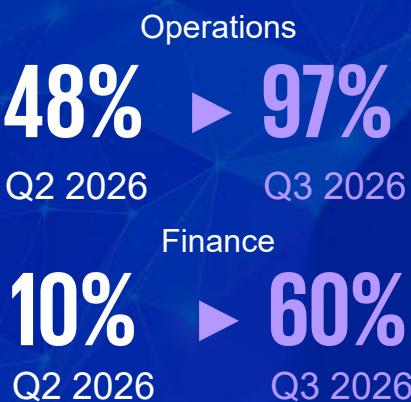
AI agent deployment and trends

AI agents are increasingly moving out of the pilot phase and into the enterprise.



Those actively developing or implementing multi-agent systems climbed to 23%, compared to only 5% last quarter.

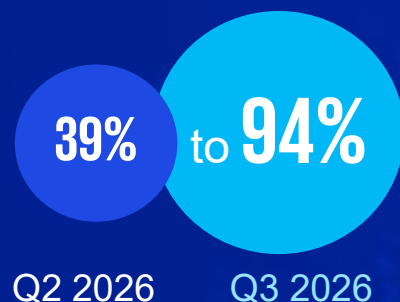
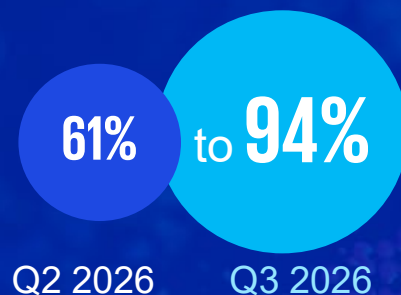
Tech companies are deploying AI agents across the enterprise.



Workforce

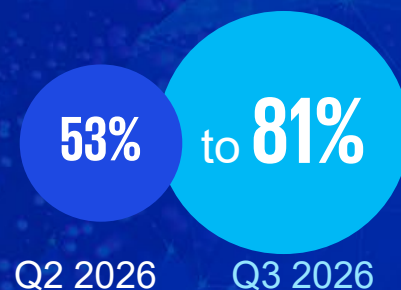
Organizations are formalizing how employees work with AI agents. Efforts to create guidelines, protocols, and AI collaboration skills are up sharply.

Upskilling/reskilling their current workforce is a leading action tech leaders are taking to meet the needs of an AI-enabled workforce.



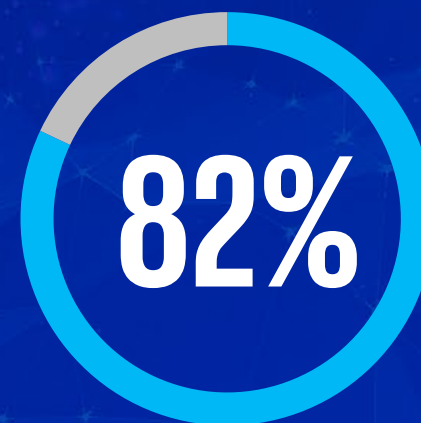
Tech leaders are dramatically increasing recruitment for new roles to meet the needs of an AI-enabled workforce.

Tech leaders are creating agent-specific sandbox environments where employees can practice interacting with AI agents.



The share of organizations reporting workforce adoption of AI agents increased to

87% up from 68% last quarter.

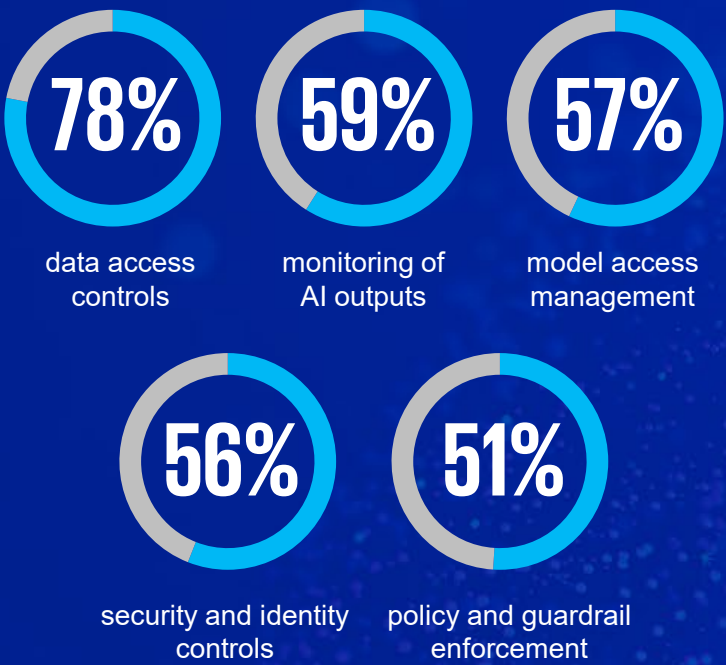


of leaders say that those who make strong and effective use of AI are outperforming others, compared to 35% last quarter.

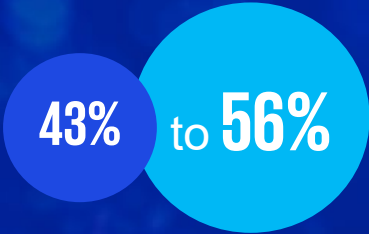
Governance and data

As AI agents scale, organizations are drawing sharper lines around autonomy, focusing on trusted data and clearer boundaries for autonomous decisions.

What's included in organizations' AI harness layer:

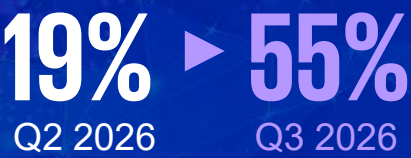
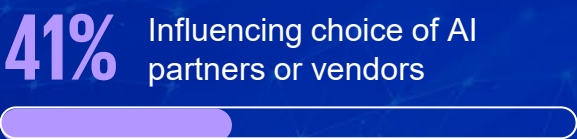
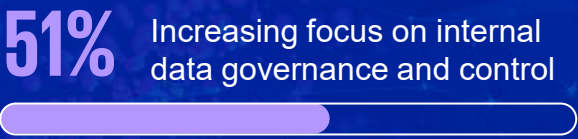


Over half are establishing clear protocols for when and how to use AI agents, up quarter-over-quarter.



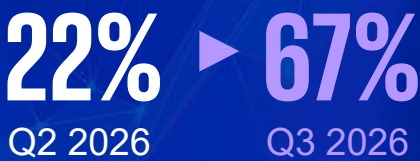
93% agree their organization has the capabilities and governance to manage AI risks at scale, **up from 66% last quarter.**

AI and data sovereignty is most shaping tech organizations' AI strategy by:



Tech organizations are increasing requirements for human-in-the-loop oversight of autonomous agents.

Identification of high-risk use cases where autonomous agent decision-making is not allowed is up 45 ppt. since last quarter:





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

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. USCS044412-2A

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