AI Quarterly Pulse Survey Q2 2026

June 2026

Executive summary

The economics of AI

Organizations are confronting an emerging challenge: understanding and managing the cost of operating AI at scale. While many companies have established foundational governance elements such as monitoring dashboards and approval processes, most still lack full, end-to-end visibility into AI-related costs in real time.

This gap is becoming more critical as organizations shift from isolated AI use cases to coordinated, enterprise-wide agent deployments.

AI agent orchestration expands

While overall AI agent deployment remains steady, organizations are advancing how these agents are used, shifting from standalone applications to more coordinated, enterprise-level orchestration. The growth in multi-agent workflows signals a move 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. This progression reflects a broader shift from experimentation to operational integration, where AI agents help unify execution and drive consistency.

Aligning AI usage to meaningful outcomes

Employee concerns about working with AI agents are shifting with many increasingly feeling the strain of added complexity and workload.

At the same time, some organizations are testing incentive models to accelerate adoption, but not all approaches are proving effective. Efforts that prioritize usage metrics over meaningful outcomes risk reinforcing the wrong behaviors.

Scaling agent adoption successfully will require a sharper focus on employee experience, clearer alignment to outcomes, and more intentional approaches to driving engagement.

Top-down vision, shared execution

Ownership of AI outcomes is spread across senior leadership. Responsibility for AI-informed decisions is typically shared among the CEO, executive committees and broader C-suite.

At the same time, many organizations are elevating AI as a clear leadership priority at the top, with CEOs taking an active role in setting direction and signaling its strategic importance.

Together, these dynamics point to a model where AI leadership is anchored at the top but executed across a broader group of leaders, reflecting the cross-enterprise nature of AI and its impact on how decisions are made and value is delivered.

The KPMG Quarterly AI Pulse Survey in the U.S. captured perspectives between April 28th and May 25th from 204 U.S.-based C-suite and business leaders representing organizations with annual revenue of $1 billion or more.

Investment and strategy

Q2 2026	$202 M
Q1 2026	$207 M
Q4 2025	$124 M
Q3 2025	$130 M
Q2 2025	$88 M

Average projected investment over the next 12 months holds steady at

$202 million

since last quarter.

Top investment categories between $10M and $49M:

55% Cybersecurity

48% Data and analytics

45% Research & development

66%

agree or strongly agree

their organization's is able to future-proof its AI strategy (e.g. adapting to new technologies and regulations, scaling AI responsibly, and avoiding locking into specific tools or vendors).

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

92% Data security/privacy/risk concerns

76% Pressures to demonstrate value to investors or board

68% Limitations on hiring, upskilling initiatives

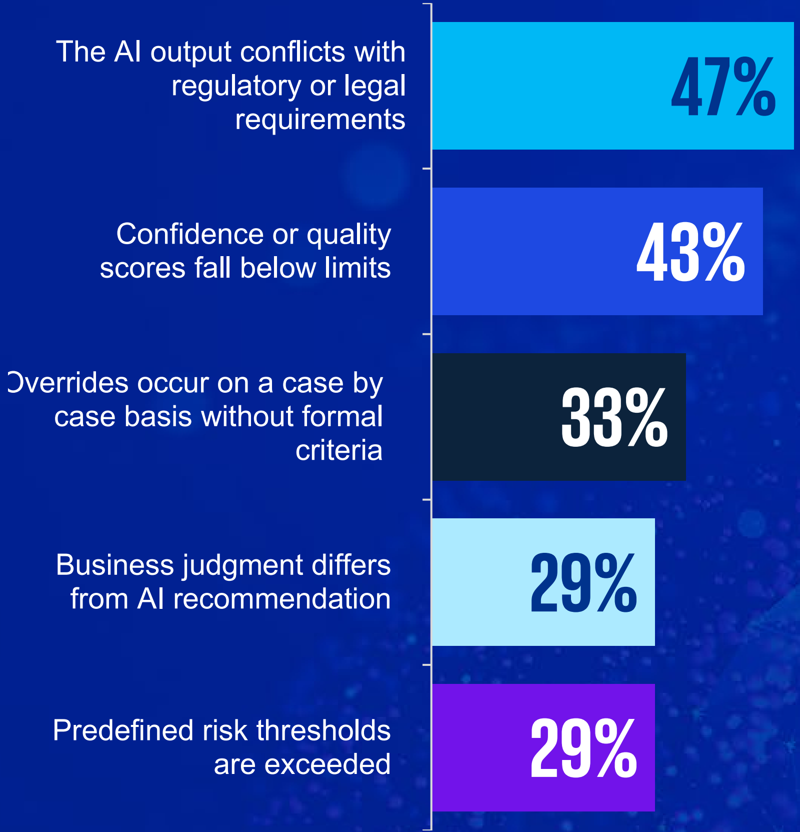
68% Access to lower cost, high fidelity technology/Large language models

68% Balancing AI scaling and carbon emissions/sustainability impact

The KPMG Quarterly AI Pulse Survey in the U.S. captured perspectives between April 28th and May 25th from 204 U.S.-based C-suite and business leaders representing organizations with annual revenue of $1 billion or more.

Accountability and cost visibility

Triggers a decision to override an AI output:



Accountability for AI- informed or executed business decisions is split:

32% CEO or executive committee

34% A named C-suite executive (CIO, CAIO, COO, etc.)

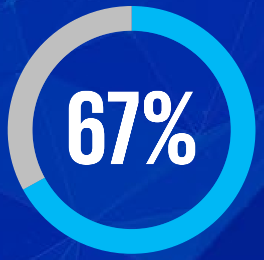
14% Business unit leader

10% Centralized AI governance/ risk committee

The top risk mitigation approach to AI agents in the next 6-12 months is

a “human-in-the-loop" model where a person validates outputs but does not oversee each agentic action or decision:

52% for the second consecutive quarter



Agree or strongly agree:

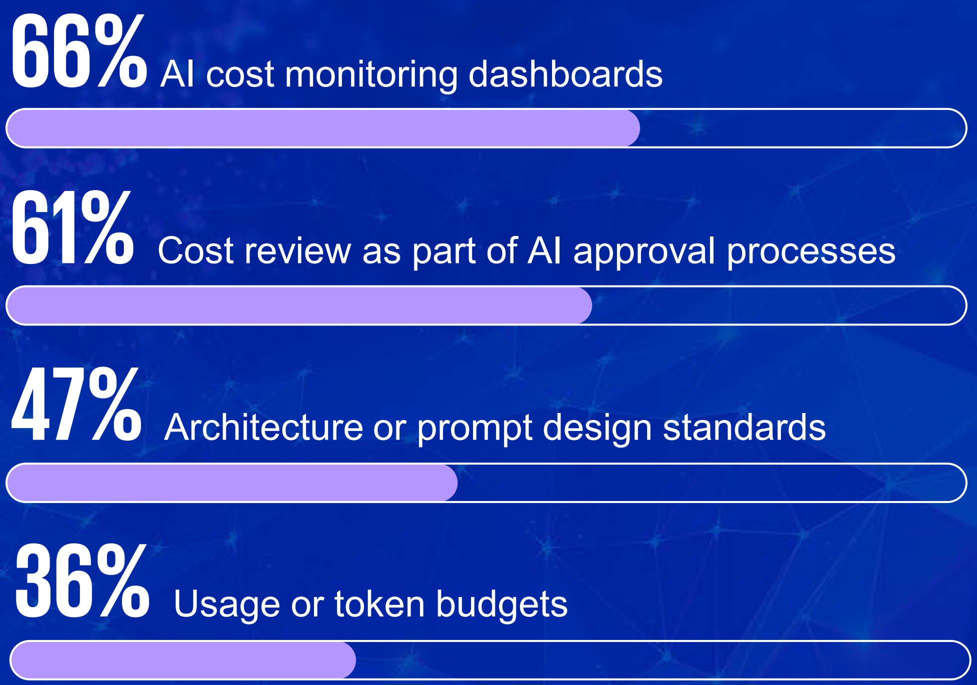
My organization's CEO actively owns AI as a strategic business priority, with clear accountability for AI-related outcomes across the organization.

The KPMG Quarterly AI Pulse Survey in the U.S. captured perspectives between April 28th and May 25th from 204 U.S.-based C-suite and business leaders representing organizations with annual revenue of $1 billion or more.

Accountability and cost visibility

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

Efforts currently in place to manage AI usage costs:



KPMG

The KPMG Quarterly AI Pulse Survey in the U.S. captured perspectives between April 28th and May 25th from 204 U.S.-based C-suite and business leaders representing organizations with annual revenue of $1 billion or more.

AI agent deployment and trends

AI agent deployment holds steady at

53% Compared to last quarter **55%**

Scaling AI agents across multiple functions

33% ▶ 29%
In Q1 In Q2

Developing/implementing multi-agent systems / agentic AI systems

6% ▶ 6%
In Q1 In Q2

Orchestrating multiple AI agents across workflows

9% ▶ 18%
In Q1 In Q2

Exploring the possibility of using AI agents

14% ▶ 10%

Piloting AI agents

30% ▶ 35%

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

64% Aligning shared goals, KPIs, and success metrics across function

49% Supporting joint decision-making (e.g., shared insights, recommendations)

48% Automating workflows that span multiple functions

Biggest challenges to deploying AI agents:

58% **Data readiness and access**

43% **Human oversight skills** (e.g. Human-in-the-loop judgment and escalation skills)

38% **Complexity of agentic systems**

37% **Technical skills gaps**

35% **AI cost and economic literacy skills** (e.g., understanding usage-based AI costs such as token or inference costs)

KPMG

The KPMG Quarterly AI Pulse Survey in the U.S. captured perspectives between April 28th and May 25th from 204 U.S.-based C-suite and business leaders representing organizations with annual revenue of $1 billion or more.

Agent collaboration, upskilling and token-maxxing

One in five employees (20%) express resistance to AI agents, up from 5% last quarter, while 37% report a mixed response and 43% indicate some level of adoption.

37% Mixed response

19% Slight resistance

1% Significant resistance

Employee adoption of AI agents dropped quarter over quarter from 55% to 43%

47% Leaders agree or strongly agree that employees who make strong and effective use of AI are outperforming others.

41% of leaders would consider implementing **token-maxxing incentives** at my organization (using as many tokens as possible, often tracked on internal leaderboards) to encourage AI usage.

Concerns over skills gaps declined from 76% ▸ 57% quarter-over-quarter

from 53% to 27% **Anxiety around insufficient training or support dropped by nearly half.**

Concerns about job security also dipped from 67% to 55% q-o-q.

At the same time, **resistance driven by increased workload or complexity** – where AI makes work feel harder rather than easier – has nearly doubled, rising from 28% to 51% In Q2 2026

The KPMG Quarterly AI Pulse Survey in the U.S. captured perspectives between April 28th and May 25th from 204 U.S.-based C-suite and business leaders representing organizations with annual revenue of $1 billion or more.

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.