



Global AI Pulse

Q1 2026

Executive summary

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Artificial intelligence is scaling rapidly across the enterprise, but enterprise performance is not yet keeping pace with the scale of investment. While 95 percent of organizations surveyed report having an AI strategy, only 8 percent report established return on investment. These front-runners are showing the way on how to deliver meaningful and measurable enterprise-wide value with AI. Sixty-four percent already report meaningful business value, highlighting a gap between ambition and realized value.

Organizations are moving beyond experimentation, with 39 percent now scaling AI or driving adoption organization-wide. Investment remains strong, with organizations planning to invest an average of US\$186 million over the next 12 months.¹ Within this expanding landscape, a distinct group — approximately 11 percent — is beginning to separate from the pack, not through greater investment or broader deployment, but through how they integrate AI into how the enterprise operates.

This analysis draws on KPMG's first Global AI Pulse, a global survey of 2,110 senior executives across 20 countries, territories and jurisdictions and 8 sectors, including C-suite leaders and their direct reports from large organizations. The study examines how organizations are

deploying AI, where constraints are emerging and what distinguishes those beginning to realize value at scale.

Enterprise-wide performance remains uneven despite continued investment. Few organizations demonstrate the ability to consistently measure and scale value across the enterprise.

The widening gap between leaders and laggards is not simply driven by safe access to tools, data, and driving usage, although many see these as key challenges. Learning from the AI leaders, unlocking value requires enterprises to be designed to operate with AI as an orchestrated, enterprise-wide system.

At this stage, performance depends on how effectively organizations embed AI into the enterprise as an operating capability. As AI agents become more widely deployed across workflows, value depends on three factors:

- The shift from pilots to AI-enabled operating models that integrate workflows, data and decision-making
- Governance embedded as a prerequisite for scale, enabling trust, control and coordination
- Workforce capability distributed across the enterprise to support AI-enabled execution

These factors form the foundation of orchestration: the ability to operate AI as a coordinated, enterprise-wide system.

AI leaders translate investment into measurable enterprise value by operating AI across workflows, aligning it to business outcomes and coordinating it across systems as part of an integrated operating model. Increasingly, this includes deploying and orchestrating agentic AI across functions, often ahead of fully established enterprise-wide ROI.

These organizations demonstrate distinct advantages. They are more likely to use AI to drive growth rather than cost reduction, report higher confidence in measuring business impact, show stronger workforce readiness and invest more heavily in the foundational capabilities required to scale performance.

For most organizations, this shift has not yet taken place. AI adoption continues to expand without corresponding changes to how the enterprise operates. Investment increases activity, but performance remains uneven, despite many organizations already reporting meaningful value.

The constraint is not access to technology, but the ability to operate AI at scale.

¹ Average reflects a weighted mean based on reported planned investment across respondents, adjusted for sample representation by organization size and region.

Key findings

These key metrics reflect a widening gap between AI execution, capability and realized enterprise performance.

Commitment to AI is widespread

US\$186M

Global average planned AI investment²

ASPAC leads (**US\$245M**), followed by Americas (**US\$178M**) and EMEA (**US\$157M**)



Organizations have an AI strategy

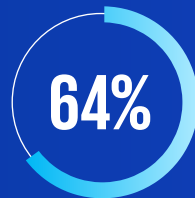
Growing share of companies are trying to scale enterprise-wide

53%
Americas

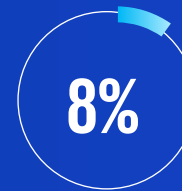
45%
EMEA

43%
ASPAC

Value is emerging but not uniform

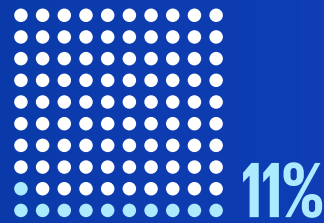


Organizations reporting meaningful AI business value



Organizations with established AI ROI

Performance is concentrated



Organizations identified as AI leaders

82% vs 62%

AI leaders vs non-leaders reporting meaningful business value

68% vs 22%

Organizations report some vs high confidence in their AI talent pipeline

Execution remains the bottleneck

54%

remain in the early stages of their AI journey

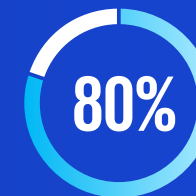
26%

Organizations advancing toward multi-agent or coordinated AI systems

75%

Executives expressing concern about AI-related risk and security

AI capability timelines are accelerating



Expect human-level AI within 5 years

² Average reflects a weighted mean based on reported planned investment across respondents, adjusted for sample representation by organization size and region.

How KPMG can help

KPMG works with organizations to help close the gap between ambition and value, helping design AI-enabled operating models, embed governance and risk frameworks and build the workforce capabilities needed to scale.

KPMG Velocity: helping organizations change smarter and move faster

KPMG Velocity provides AI-enabled products and services through a platform ecosystem for organizational change. It integrates our insights, methods, expertise, capabilities and data with advanced technology, to help clients build and operate intelligent, agile and resilient enterprises, capable of sustaining the next level of growth and value creation.

01 Evolve the enterprise

KPMG supports clients in rethinking and redesigning their operating models to embed AI at the core. This includes:

- Establishing modern technology foundations powered by AI and data.
- Redesigning enterprise functions for AI enablement.
- Orchestrating agile operating models and intelligent ecosystems.
- Preparing the workforce through transformation and continuous learning.

02 Build trust

Underpinned by a Trusted AI framework, KPMG Velocity harnesses the power of AI and ensures that AI deployments align with principles of ethics, transparency, fairness and accountability. KPMG helps organizations build not only smart AI systems, but also trustworthy and compliant ones, especially critical in regulated or reputationally sensitive environments.

03 Embed agentic AI capabilities

AI is not an add-on; it's embedded in everything KPMG delivers.

- KPMG agents: Pre-built, purpose-designed AI agents that can be deployed within client organizations to augment decision-making, automate processes or deliver continuous services.
- Intelligent support and recommendation engines: Embedded in delivery workflows to enhance efficiency, quality and speed.

04 Enable sector-specific ecosystems

KPMG Velocity enables sector-specific ecosystems with alliances such as Google Cloud, Microsoft, Oracle, Salesforce, SAP, ServiceNow and Workday, to create industry-specific transformation solutions. KPMG Velocity provides prepackaged, sector-aligned journeys (e.g. in healthcare, digital banking, human services) that can accelerate time to value while enabling strategic differentiation.

05 Futureproof through innovation

KPMG Velocity helps establish modernized technology foundations that unlock rapid AI innovation and value to accelerate deployment of AI solutions. You can achieve a robust, agile and cost-effective infrastructure for advanced AI, transforming your technology stack into a strategic asset for continuous innovation and sustained competitive advantage.

The next phase of AI is already underway. Wherever you are on your journey, KPMG is ready to help you lead it, with clarity, confidence and momentum.

Global AI Pulse methodology

This is the first of a quarterly series being conducted with a global reach.

Sample design

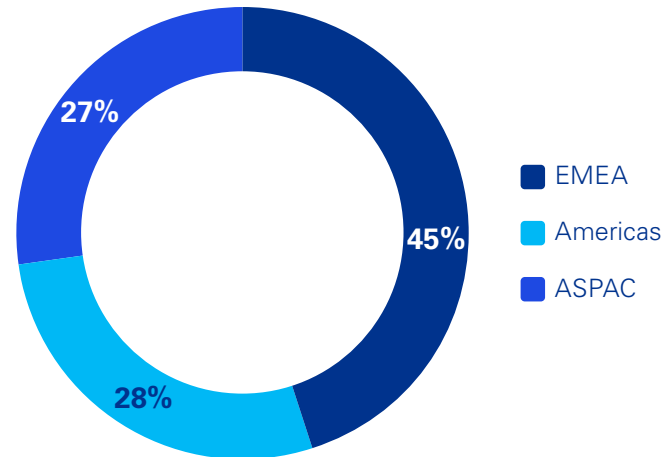
The survey was conducted among n=2,110 C-suite and senior business leaders working in organizations with annual revenues of at least US\$100M.

Participants completed the survey online between 19 February and 17 March 2026, across 20 countries, territories and jurisdictions in the Americas, EMEA and ASPAC.

Respondent profile

Respondents represented a mix of **20+ industries and sectors**, including technology, financial services, manufacturing, professional services, healthcare and public sector.

- **Geographies:** sampling across major global regions, including North America, Europe, Asia-Pacific and Latin America.



Analytical definitions

For the purposes of this survey:

- **AI maturity** refers to the phase an organization reports being in along its AI journey, from early research to established ROI.
- **Agentic AI engagement** assesses the degree to which organizations are implementing or scaling AI agents and multi-agent systems.
- **AI leaders** are defined as organizations in the **top two maturity stages** and the **top three categories of agent deployment**.

This combined definition reflects organizations that are both **AI-mature** and **actively advancing agentic AI leadership**.

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At KPMG, every idea starts with human ingenuity. KPMG professionals combine their insight and creativity with AI tools, applying them thoughtfully and responsibly under the KPMG Trusted AI framework to develop imagery and content.

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