

A JITTERBIT REPORT

2026 Jitterbit AI Automation Benchmark Report

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INTRODUCTION

As AI experimentation has given way to aggressive agentic deployment, the conversation has shifted from what's possible to what's *measurable*. In this new reality, there's no longer room for tools that merely 'feel innovative': In contrast with previous years, **businesses now have a clear strategy, with a clear leader and clear goals**. The roadmaps have been drawn, and all paths lead to building an autonomous agentic enterprise that delivers a competitive advantage and tangible financial benefits.

We don't have to rely on reports and thinkpieces to know this reality is within reach. We see it taking form with every new agent we create, and with every agent our customers create on their own. As one proof-of-concept after another goes from pilot to production... as each new autonomous agent takes its place within the larger environment... **we've seen agentic transformation success stories play out in real time.**

Competing Realities

But if end-to-end agentic automation is present-day reality, why do so many businesses seem to still be struggling to achieve it? Despite breathtaking adoption speed and record-breaking investment in AI, **MIT recently reported** that 95% of corporate generative AI pilots are failing. Likewise, **Gartner® estimated** that 40% of agentic AI projects will be cancelled by the end of 2027 due to "escalating costs, unclear business value or inadequate risk controls."

Amidst these conflicting narratives, we wanted to get a better idea of the true success of global AI initiatives at large, as well as the motivations and metrics underpinning them. So we partnered with independent survey firm Censuswide to conduct the 2026 Jitterbit AI Automation Benchmark survey. Responses were gathered from a random assortment of 1,501 IT decision-makers in the U.S., U.K. and Brazil who had begun using AI in their business.

Once the results were tabulated, we did not find that 95% — or even 40% — of AI projects were failing. According to our survey data, only 2.5% of organizations reported project failure or negative ROI.

In fact, while our respondents reported a wide range of AI maturity levels (see sidebar), success rates were surprisingly consistent, with 78% of AI automation projects already delivering moderate to high value.

And companies are doubling down on these successes: While the average respondent has 28 agents currently deployed in their environment, they expect to have 40 deployed by year's end — a 43% increase in adoption velocity.

➤ INTRODUCTION

Two Critical Ingredients for Success: Integration & Accountability

This continued focus is already paying major dividends for some: nearly 4% of survey respondents said their businesses had **fully achieved end-to-end automation of processes**.

Surprisingly, among respondents still working toward that goal, budget was cited as a challenge for less than 15%. Roughly 4 in 10 named security and compliance as blockers, while nearly *two-thirds* cited integration struggles (either legacy system integration or data silos overall.)

With connectivity proving to be the ultimate barrier to end-to-end automation, the most successful businesses are not the ones adopting the most AI the fastest. They're the ones doing the necessary work to integrate it into the environment and connect it with all the data and systems that it needs to live up to its potential.

They're not the ones shoehorning AI into every existing process; **they're the ones diligently rethinking and rewriting processes around these new capabilities**.

But while lack of integration might pose an existential threat to agentic AI initiatives, security and compliance failures can pose an existential threat *to the business*.

As AI becomes core infrastructure, deploying it without guardrails becomes increasingly risky. Fortunately, respondents recognized this: In addition to being a primary blocker for 39% of respondents, we also found that 47% of respondents believe AI accountability (including security, auditability, traceability and guardrails) is the most important factor when evaluating new AI-enabled tools. This is particularly pronounced in software and tech, where accountability is a top priority for 61% of respondents.

➤ The AI Adoption Journey

As part of this survey, we asked respondents about their level of AI adoption, or AI maturity, based on five levels:

AD HOC:

AI is being used on individual basis
Employees are using standalone tools like Claude

ASSISTIVE:

AI co-pilots are deployed
Apps help employees find data or suggest action, but humans still execute

CONNECTED:

Respondent businesses are RAG-enabled
AI retrieves live data from internal systems, but cannot perform actions

AGENTIC:

AI is action-oriented
Agents integrated with APIs to perform tasks autonomously

ORCHESTRATED:

Ecosystems are fully orchestrated
Multiple agents collaborate across departments for end-to-end business process orchestration

Safety First But Speed Second

When evaluating new AI-enabled tools, which, if any, criteria most influences your final purchase decisions?

When looking for statistics on global AI tools, you'll see the number 90,904 appear time and again. "Wow", you might be saying to yourself "That's a lot of AI tools!"

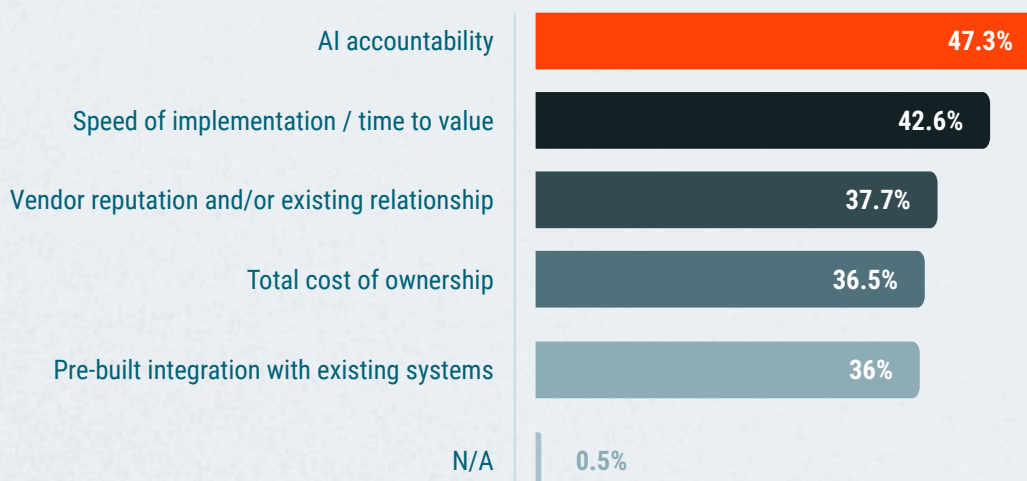
Not quite. That's the number of **dedicated AI companies. Globally. In 2024.**

The actual number of AI tools has long passed the threshold of countability, but the fact that AI-related repositories on GitHub are increasing by over **230 each minute** should give you some idea of the **magnitude of AI growth in 2026**. Given today's staggering array of options, how are companies prioritizing which AI-enabled tools to choose?

Across the board, **AI accountability** (47.3%) drives purchase decisions, demonstrating the growing importance of security, auditability, traceability, guardrails and responsible-use controls — not just within organizations, but also in the ones they do business with.

But safety isn't enough. As AI continues to shift from the realm of "Let's see what this wild new technology can do!" to "Deliver measurable ROI. You have 90 days," **agility is key** (42.6%). With approximately 90,903 other companies offering AI tools — and a highly involved C-suite willing to cut budget for tools that are too slow to implement or achieve ROI — partnering with a vendor that prioritizes agility has never been easier, or more critical.

Criteria Influencing Final Purchase Decision



* Because respondents were allowed to choose up to three, total will not add up to 100%

➤ **Nowhere is this more true than the UK**, the only region that ranked speed to value (39.4%) higher than AI accountability (38%). Combined with other report data, this suggests a climate in which **AI decisions are made slowly, methodically and incrementally** — but once they're settled, respondents want to see results *yesterday*.

The opposite is true in Brazil. The country's aggressively bullish approach to AI transformation requires the support of equally aggressive security measures, leading nearly six in ten respondents to cite **AI accountability as a top concern**.

Criteria Influencing Final Purchase Decision **By Country**

	UK	USA	Brazil
AI accountability	38.0%	44.6%	59.3%
Speed of implementation/time to value	39.4%	38.8%	49.7%
Vendor reputation and/or existing relationship	36.2%	36.4%	40.5%
Total cost of ownership	32.2%	31.6%	45.7%
Pre-built integration with existing systems	30.4%	37.2%	40.5%
N/A; No criteria most influence my final purchase decision	1.2%	0.2%	0.2%

➤ Integration is Foundational

AI agents are only as useful as the data they can access. Integration transforms AI agents from isolated text generators into active, useful systems. By connecting to external databases, APIs and software ecosystems, an agent can access real-time, context-specific data rather than relying solely on the static knowledge it was trained on. This continuous connection is critical, because it grounds the agent's reasoning in current reality—dramatically reducing errors and ensuring that its insights are relevant to your specific environment.

AI agents are also only as autonomous as the systems they can access. The proper functioning of an AI agent depends entirely on its ability to execute tasks autonomously, which is impossible without deep system integration. When seamlessly plugged into daily workflows, such as updating a CRM or triggering a live financial transaction, AI agents are capable of unlocking unprecedented productivity — but without these secure, bidirectional connections, the agent hits a frustrating dead end. In other words, the true value of an AI agent is not just in what it knows, but what it can actually do, and integrations are the only way to unlock the ability to do.

➤ As businesses move **from basic AI usage, such as chatbots, to autonomous end-to-end automation systems**, their purchasing criteria evolve dramatically.

Among Ad Hoc users, priorities are fairly balanced between cost (38.7%), accountability (38%) and vendor reputation (38.7%). But once AI is implemented autonomously across departments, the need for safety skyrockets.

Approximately two-thirds of respondents at the Orchestrated stages say AI accountability is a top criteria

— with integration taking a back seat (28.6%) at this stage, likely because they've already completed their major integration projects.

Across all revenue bands but one, **accountability was by far the top factor in choosing an AI-enabled tool**, with over half of respondents in the two largest tiers saying it was a priority (51.6% and 53.3%, respectively.)

Among lower mid-market businesses, however, speed was king (45.6%), with accountability trailing just behind at 39.8%.

Criteria Influencing Final Purchase Decision By Revenue

	Small Businesses	Lower Mid-Market	Upper Mid-Market	Large Enterprises
AI accountability	49.0%	39.8%	51.6%	53.3%
Speed of implementation /time to value	41.7%	45.6%	42.5%	38.9%
Vendor reputation and /or existing relationship	39.0%	34.0%	34.7%	48.9%
Total cost of ownership	37.9%	33.7%	37.4%	33.3%
Pre-built integration with existing systems	37.4%	37.4%	28.3%	36.7%
N/A	0.1%	0.0%	1.8%	3.3%

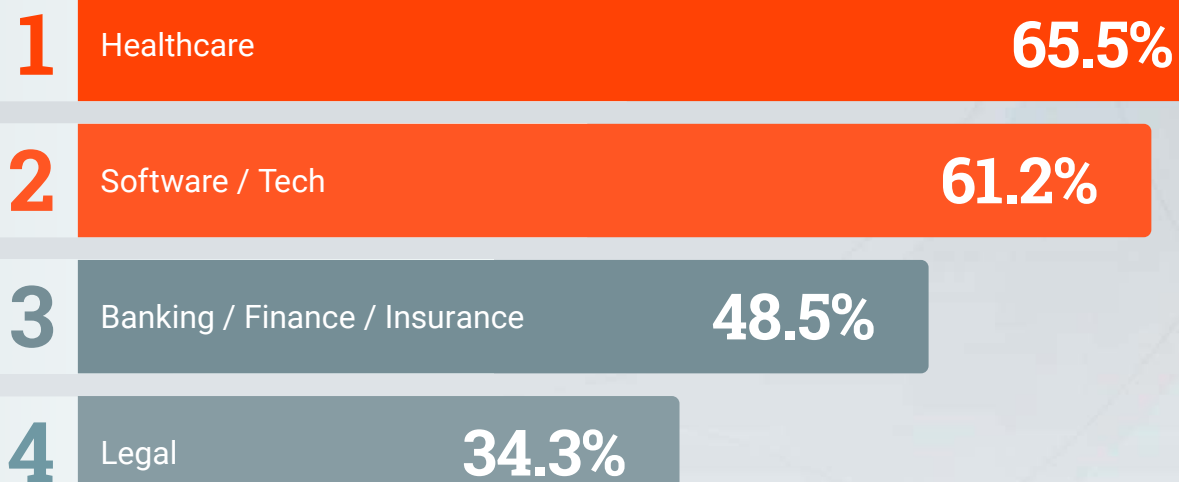
* For more on how we define business size, see Methodology section.

➤ Tools of the Trade

Overall trends can hide a surprising amount of variation. While you'd probably expect there to be some differences in what **Tech, Legal, Healthcare and Finance** businesses, for example, prioritize when making an AI purchase, our data shows **trend-breaking fluctuations are the rule**, rather than the exception.

How Much AI Accountability Influences Purchases **By Sector**

INCLUDES SECURITY, AUDITABILITY, TRACEABILITY, GUARDRAILS AND RESPONSIBLE-USE CONTROLS



➤ Security, At Speed

Jitterbit set the standard for accountable AI with its **ISO 42001 certification** — an industry first. **But we're also setting the standard for speed.**

In the **latest G2 rankings** (Winter '26), Jitterbit earned multiple **Fastest Implementation badges**, achieving a time-to-go-live that's less than half the industry average for iPaaS, (1.74 months vs. 3.5 months).

Jitterbit also earned **Best Estimated ROI badges** across our entire portfolio of products — and we did it faster, with iPaaS delivering ROI in just 6.86 months, 2.5 times faster than the industry average.

[Learn more here.](#)



C-suite Currently Controls AI Initiatives

Who primarily authorizes funding and approves AI automation initiatives — and what function should own this strategy to ensure success?

Who owns AI strategy?

It depends on who you ask ... and when. In our 2024 survey, we posed a similar question — and 63.3% of respondents felt responsibility should rest with middle management and department heads.

By 2026, only 3% of respondents shared that view.

As AI has spread from the early adopters in the IT department to the company as a whole, AI deployments have become more strategic.

Who better to lead the charge than the company's foremost strategist?

23% of 2026 respondents said the CEO currently “owns” AI, coming in just being IT leadership (23.1%) But when asked **who should own AI at their business**, the CEO jumped to the No. 1 spot. (25.4%). Combined with our data showing “Lack of direction from leadership” as a significant bottleneck to AI initiatives, this suggests that respondents have experienced the disconnected, siloed AI deployments led by line-of-business heads — and they weren’t a fan.

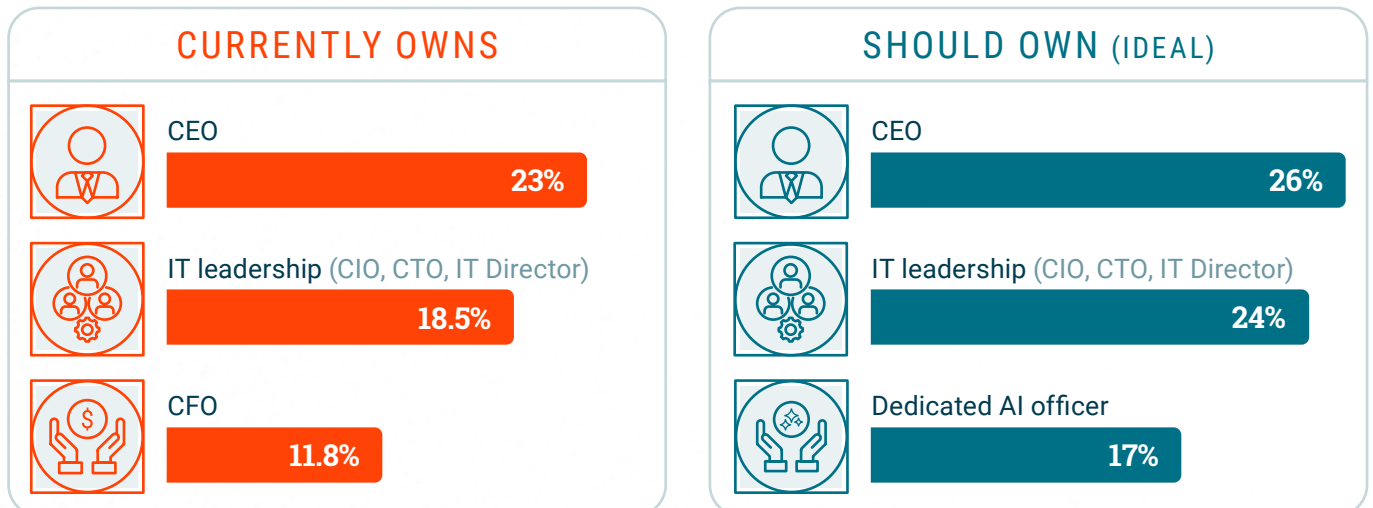
Currently, C-suite positions control AI funding and authorization at more than two-thirds of the companies surveyed — and an equal number was happy with this status quo. The need for strategic executive oversight has been so great, in fact, that it’s given **rise to an entirely new role: The dedicated AI officer, CAIO (Chief AI Officer) or AI executive.**

These roles were uncommon when we commissioned our 2024 survey: No one in that dataset reported having a dedicated AI officer. However, these roles showed the most significant proportional growth in 2026. More people said the CAIO should own AI than the number who said they currently *do* own AI in every single country, AI maturity level and revenue band except one.

- While the CFO currently oversees AI in 11.8% of businesses, among survey respondents, only 8.1% would keep that structure. This may represent an overcorrection: While it's true that AI can't move from the experimental stage to

enterprise backbone with a free-for-all model of ownership, **growth and innovation can suffer when the technology is viewed strictly as a cost-cutting exercise.**

AI Automation Ownership: Current vs. Ideal State



Based on our survey data, location also plays a role in who owns AI.

The UK leads in both *having* a dedicated AI officer (9%) and *wanting* a dedicated AI officer (13.8%), likely due to the region's stricter and strengthening regulatory environment.

In the U.S., IT leadership (23.4%) and the CFO (20.6%) are most likely to be in charge — and respondents were happy with only *half* that equation. While the perfect-world scenario saw IT leadership holding onto most of their power, the percent keeping the CFO in power plummeted by nearly half, with most of that lost ground going to the CEO.

Brazil was the only country that felt the CEO (26.9%) should step back (21.2%), and that control should rest with IT leadership and the CTO (46.8% combined).

AI Automation Ownership: Current vs. Ideal State By Country

	UK		USA		Brazil	
	Currently Owns	Should Own	Currently Owns	Should Own	Currently Owns	Should Own
CEO	22.8%	24%	19.2%	31%	26.9%	21.2%
IT leadership (CIO, CTO, IT Director)	20.6%	19.2%	23.4%	22.8%	25.1%	26.1%
CFO	8.2%	8.4%	20.6%	11.8%	6.6%	4.2%
Dedicated AI officer	9%	13.8%	5%	5.6%	4.2%	9.2%

- Among the AI laggards, ownership wasn't concentrated in any particular area. But even at this phase, there is a strong desire for a CAIO, with 6.6% of these companies currently having one and more than double that number (13.4%) **wishing they had one**.

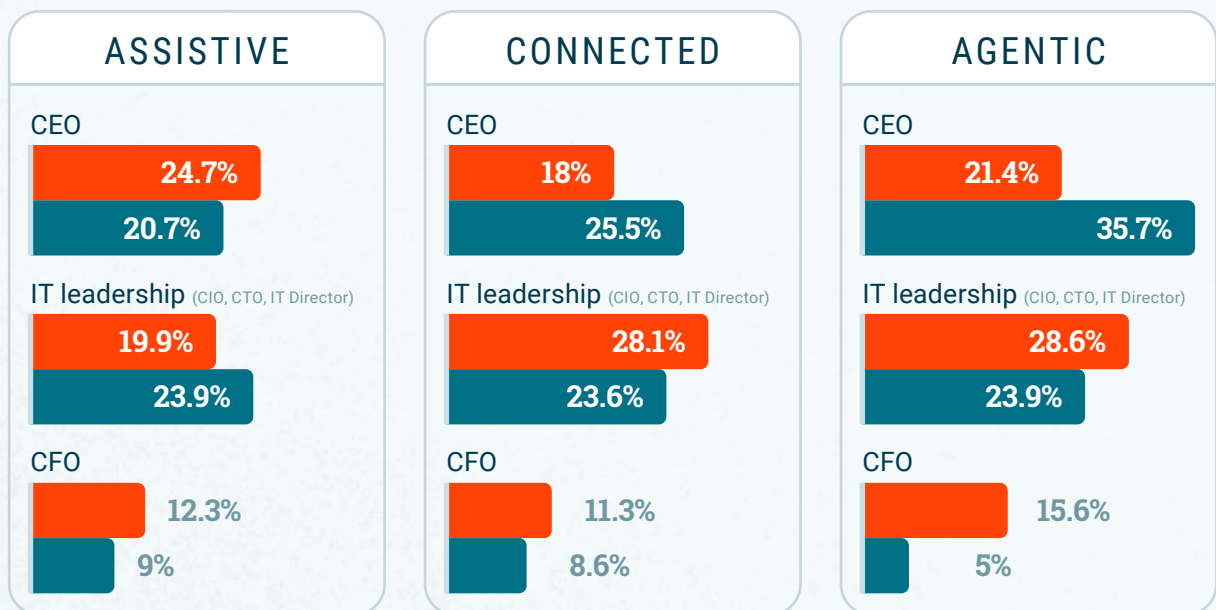
While companies at the **Connected** and **Agentic** phases have IT leadership at the helm, the two groups showed a strong desire for the CEO

to step up — with those at the Agentic stage wanting CEO ownership to jump from the current 21.4% all the way up to 35.7%.

Companies at peak maturity are overwhelmingly likely to say the CEO runs the show (38.1%), and they want to keep it that way (36.5%). At this stage, the CFO's AI leadership has virtually vanished (1.6%) — and mature businesses are happy with this outcome, too (1.6%). At this point, **AI is no longer an IT project or a finance project**: It's the fabric that connects the company, and its importance warrants direct guidance straight from the top.

AI Automation Ownership By AI Adoption Stage

Currently Owns Should Own (Ideal State)



Among the smaller businesses, **IT leadership was most likely to be in charge of AI strategy** (25.4%), and almost as many said they'd prefer to keep it that way (24.3%). But while IT still runs the show in the largest enterprises (22.2%), they're significantly more likely to say **the CEO should have control instead** (33.3%).

AI Automation Ownership By Revenue

	Small Businesses		Large Enterprises	
	Currently Owns	Should Own	Currently Owns	Should Own
CEO	23.2%	23.9%	21.1%	33.3%
IT leadership (CIO, CTO, IT Director)	25.4%	24.3%	22.2%	16.7%

* For more on how we define business size, see Methodology section.

➤ The Dangers of Decentralization

When we asked a similar question about AI ownership in our 2024 survey, a staggering 60.8% of respondents selected either *“I (without input from my colleagues) create AI guidance”* or *“I (without input from my colleagues) do not currently create AI guidance, but I should.”*

This might sound unbelievable **just two years later**, but it reflected the prevailing notion of the time that AI should belong to whoever is using it. As AI technology matured and proliferated, however, the problems with this view quickly became clear.

With no oversight or clear ownership, **AI projects can overlap and conflict** — bad when your company is paying for five separate Gemini or Midjourney accounts; potentially

catastrophic when your finance agent conflicts with your HR agent, and the resulting infinite loop sends your power bill through the roof.

Worse, it creates an ideal environment for shadow AI tools to leak sensitive company data. One recent study found that, for example, roughly **three-quarters of ChatGPT use in corporate settings happens via personal ChatGPT accounts** — and this lack of visibility can open the company up to compliance violations and security risks. Unfortunately, this ownership structure also means that if that does happen, there’s no point of accountability when something goes awry.

Fortunately, our 2026 survey data paints a rosier picture. Across all metrics, the **share of respondents who said there should be “No set owner” for AI initiatives never surpassed 2%.**

➤ The Rise of the CAIO

Virtually across the board, respondents showed a rising desire for a **dedicated AI Officer**, or a CAIO. In mid-2024, a **Gartner® survey** found that just over half of enterprises had a person serving as the *de facto* AI leader, but in 88% of these instances, this responsibility was added to an existing role (such as IT head, CIO, etc). In addition to freeing up the CEO or other role to focus on their core job duties, creating a CAIO role signals to the company and the world that your business sees AI as being as critical as any other C-level function — and offers, especially at larger enterprises, **top-down executive leadership without relying on an often already-busy and overextended CEO.**

As AI increasingly impacts strategy, risk and systems — and increasingly reframes how we interact with data, talent and operations — we’ve also seen an increase in “AI by committee.” In contrast to the by-department strategies of the past, this team is dedicated exclusively to AI and AI governance. Often reporting to the CAIO — and increasingly to boards of directors as well, as AI evolves into enterprise-critical infrastructure — these teams focus on topics like human-in-the loop thresholds, escalation paths, monitoring frameworks, kill-switch capabilities and auditability.

“AI should be led and encouraged by leadership.”

— OpenAI

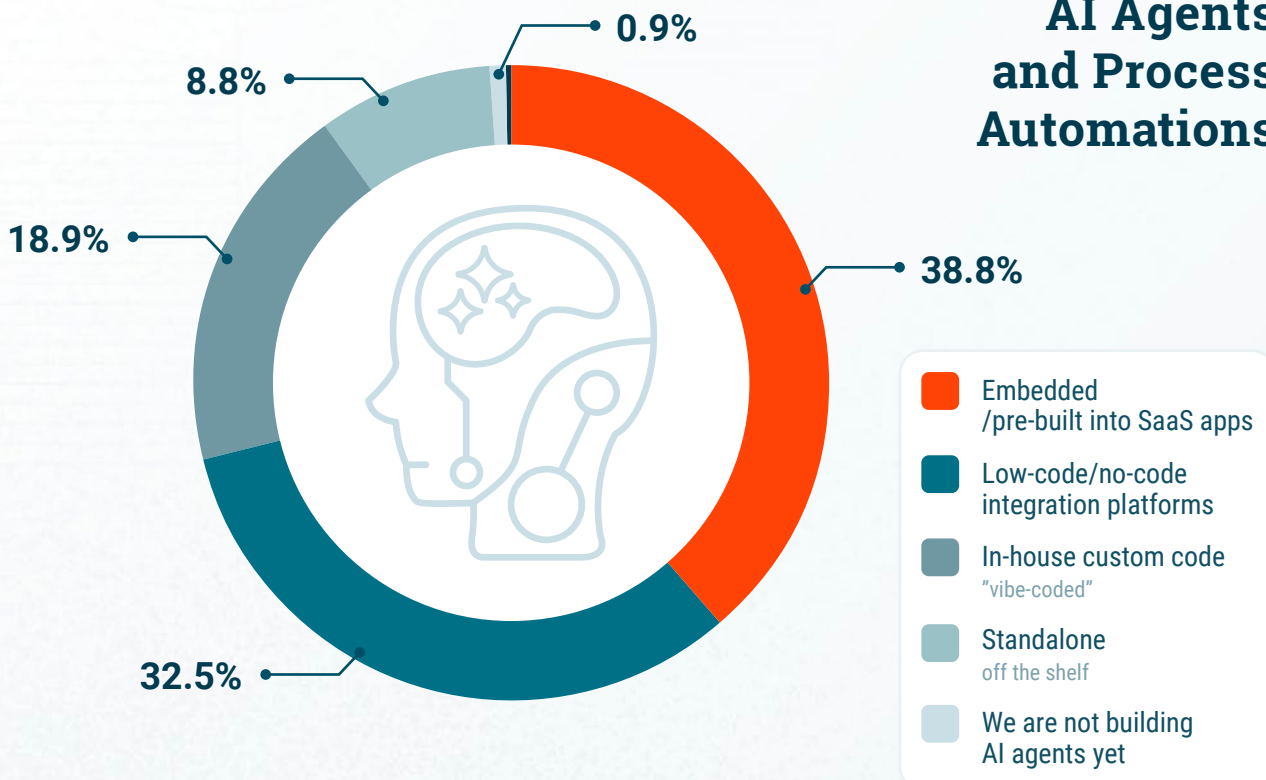
Pre-Built AI Agents The Preferred Choice

What, if anything, is your primary method of building and deploying AI agents and process automations?

While virtually all survey respondents are working toward an AI agent-powered future, there's some variation in where these agents are coming from. **Most respondents choose either the convenience** of embedded/pre-built SaaS apps (38.8%) **or the increased flexibility and versatility** of low-code/no-code platforms (32.5%) — but an interesting alternative has sprung up over the past year.

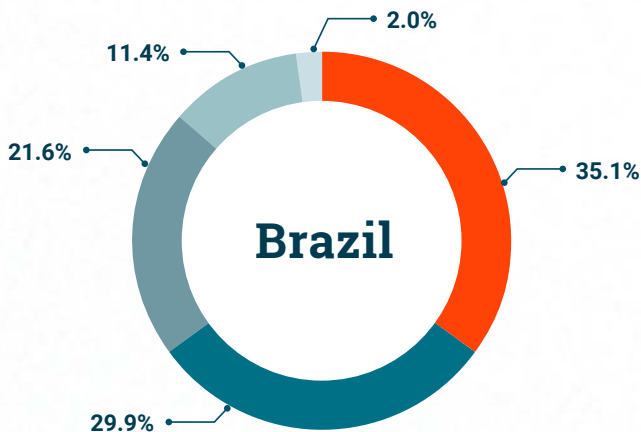
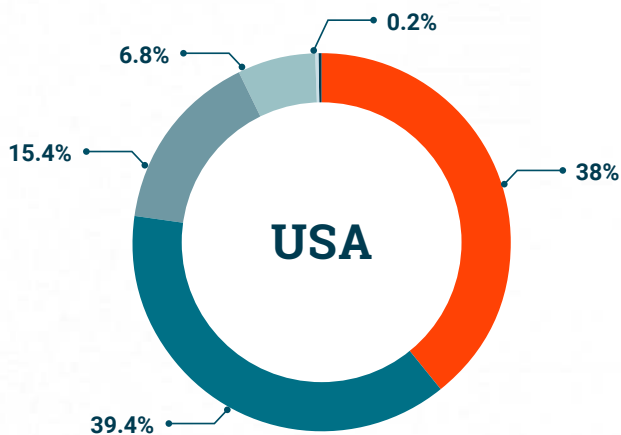
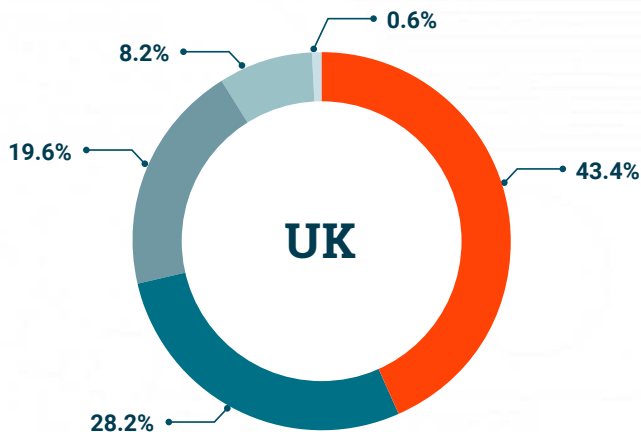
Known as “**vibe coding**” based on the idea that they allow the users to “*vibe*” with an AI, these tools **generate, debug and refine software applications based on natural language prompts** rather than manual coding. While still in the minority, nearly 1 in 5 businesses we surveyed said this was their preferred way of building agents. It's important to note, however, that point solutions like these can contribute to exactly the sort of environmental complexity and tool sprawl that can keep AI agents from achieving their full potential.

Primary Method of Building and Developing AI Agents and Process Automations



➤ Among the countries we surveyed, these **vibe-coding tools** were most widely adopted in Brazil, where 21.7% of respondents reported a preference for them despite known security risks (see sidebar). However, Brazil still leans more heavily on **agents embedded/prebuilt into SaaS apps** (35.1%), as does the UK (43.4%). The U.S. was the sole outlier, opting for **low-code / no-code integration (or automation) platforms** (39.4%) that could eliminate silos as well as build agents.

Primary Method of Building and Developing AI Agents and Process Automations **By Country**



- Embedded/pre-built into SaaS apps
- Low-code/no-code integration platforms
- In-house custom code - "vibe-coded"
- Standalone - off the shelf
- We are not building AI agents yet

DID YOU KNOW?

Jitterbit offers three ways to get AI agents: Creating your own, licensing pre-built agents from Jitterbit Marketplace, or by engaging with Jitterbit Agentic Professional Services. [Learn more here.](#)

While a fair number of survey respondents remain at the lowest/Ad Hoc level of AI adoption, these businesses showed an outsized tendency to have adopted "vibe-coding" (26.9%) and standalone (14.4%) tools. **Lacking adequate developer resources** to move to the next level of maturity, AI laggards are leveraging these options to punch above their weight class.

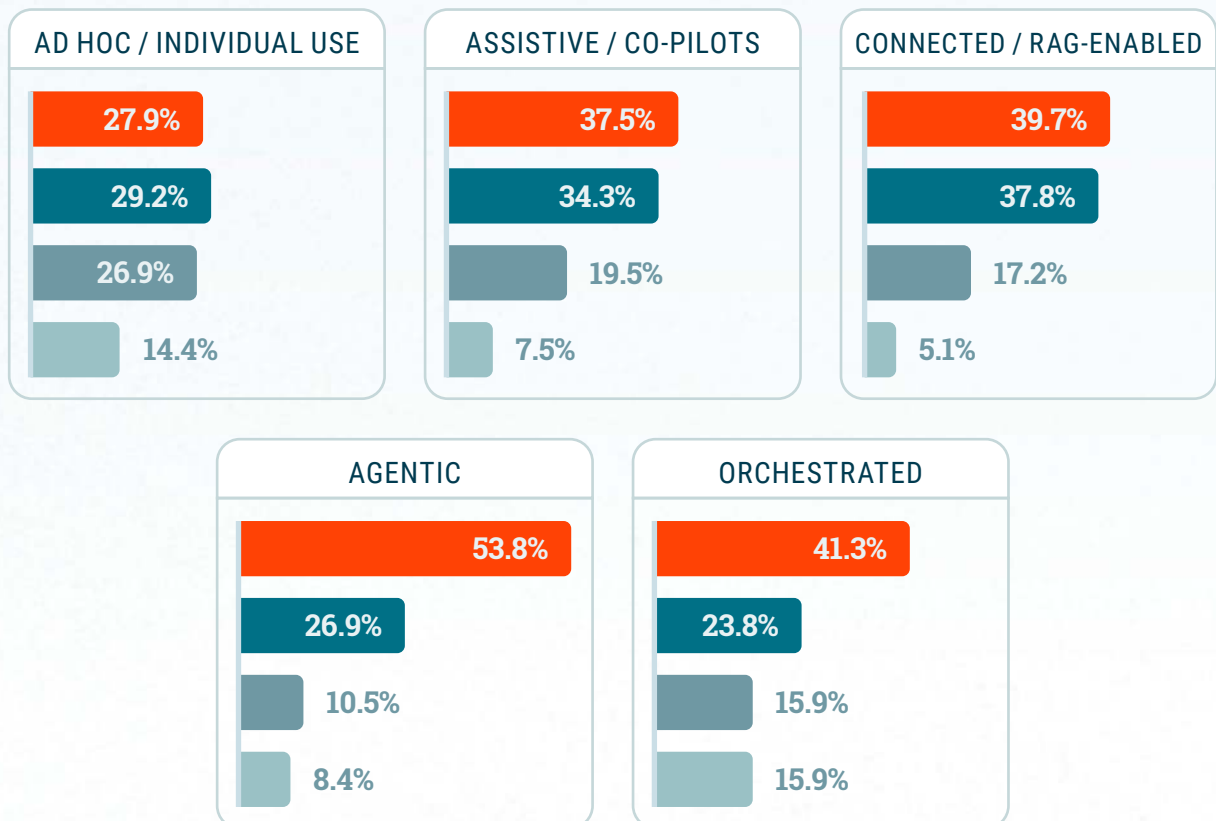
As we've mentioned elsewhere, a **properly integrated environment is a crucial piece of the agentic transformation story** — and companies at the **Connected/RAG-enabled stage** have taken note. Respondents at this stage chose low-code/no-code tools at a higher rate than any other adoption tier. These tools allow them to create integrations as well as agents, giving them a way to safely wire their live internal data into AI systems prior to full, autonomous API integrations.

By the time companies reach the **Agentic** phase, they tend to have **built relationships with a number of vendors**, such as CRMs or ERPs. Since they already trust these vendors (and they're already cutting them a check), these companies tend to pivot overwhelmingly toward the simplicity of adopting embedded agents as part of these existing SaaS deployments (53.8%).

At the **Orchestrated** stage, however, companies report leveraging all of the above, driving a surprising **resurgence in both standalone deployments (15.9%) and vibe-coding tools (15.9%)**. Companies able to successfully orchestrate their entire ecosystem are overwhelmingly likely to have proper security, governance and observability in place — **which allows them to offer team members the freedom to deploy agents in whatever way they choose**.

Primary Method of Building and Developing AI Agents and Process Automations **By AI Adoption Stage**

Embedded/pre-built into SaaS apps Low-code/no-code integration platforms In-house custom code "vibe-coded" Standalone off the shelf



➤ What's Not To Love?

Users (and investors) vibed with vibe-coding almost immediately, resulting in a \$200 million Series A funding round that valued Lovable at \$1.8 billion just eight months after its launch. But not long after, cybersecurity companies began sounding alarm bells about these tools. In tests, Lovable, along with similar offerings Base44 and Bolt, created web apps with exploitable vulnerabilities — even when specifically asked for “secure” code. According to OX Security, testing revealed that Lovable’s built-in security check caught vulnerabilities only two-thirds of the time — while Bolt’s scan didn’t identify a vulnerability at all.

Inconsistent security performance is worse than nothing, as it creates false confidence, particularly among non-technical users who lack the knowledge to spot security gaps.

In fact, the security of these solutions is so lax that they’ve become a tool for cybercriminals. According to cybersecurity firm ProofPoint, Lovable and others have been exploited by threat actors for use in investment scams, credential theft, malware loaders and more in what’s become known as “**Vibescamming**.”

“The thirst for AI capability is already resulting in shadow AI, just like shadow IT was the first move toward cloud and software as a service transformations. Security leaders will need to navigate that process again.”

— Palo Alto Networks

The Unit 42 Threat Frontier: Prepare for Emerging AI Risks

➤ Secret Agents in Your Stack

AI agents embedded in existing SaaS apps are autonomous, intelligent and extraordinarily simple to deploy. But that doesn’t mean they’re risk-free: Because these agents live in approved SaaS platforms that employees already use, their activity often appears as little more than regular user behavior in logs. These agents often require broader permissions than a typical human user to perform their duties (for example, “read” access to entire Google Drives to provide instant answers to queries of internal data). And as the SaaS apps

introduce new features or issue updates, privilege creep can occur behind the scenes, undetected until an issue occurs. **Following established best practices like ensuring SaaS-wide visibility and enforcing least-privilege access significantly mitigates these risks**, but perhaps the best prevention is partnering with vendors committed to transparency, accountability and security.

Budget Not a Bottleneck

Which, if any, of the following barriers are the primary bottlenecks preventing you from moving your AI initiatives from pilot to production?

According to Gartner®, over 40% of agentic AI projects **will be cancelled** by the end of 2027 — each one likely the result of a lengthy exploration of what those AI agents are, what they're capable of, and where they can bring the most value to the business.

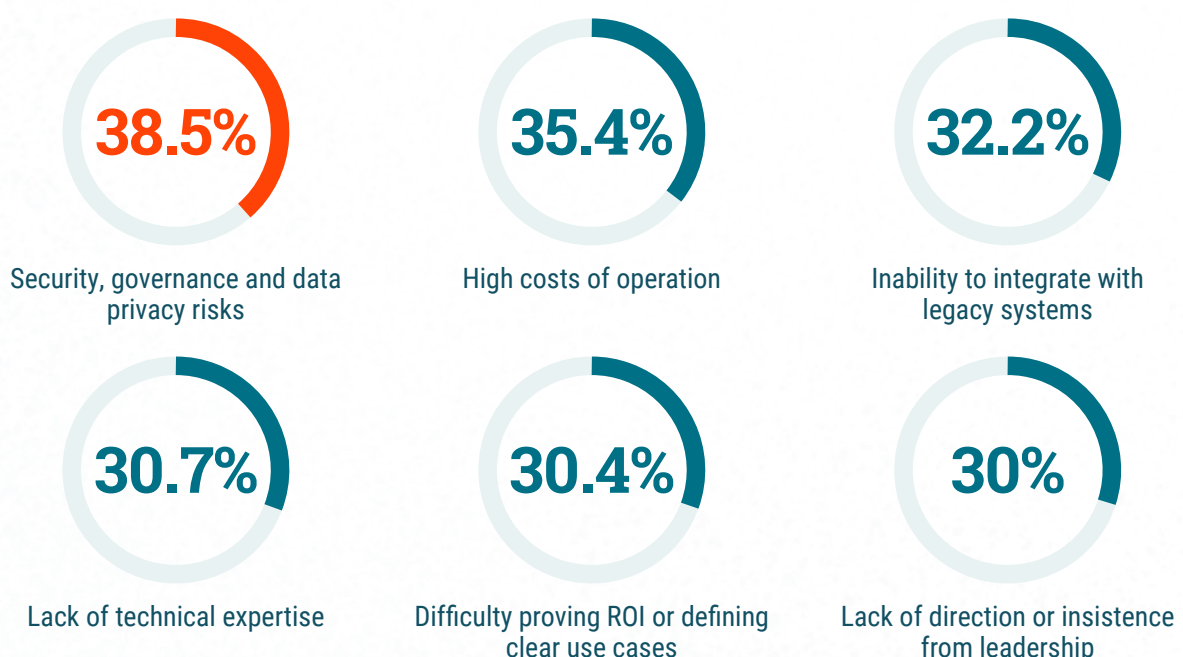
But a look at our **2026 Jitterbit AI Automation Benchmark Report** survey data suggests that this is less a problem of having arrived at the wrong answer — and more the result of having asked the wrong questions. The inability to move from pilot to production, according to our respondents, is largely driven by operational realities, as opposed to any limitations of the AI models themselves.

As we've seen elsewhere, **security, governance and data privacy risks** (38.5%) have become a make-or-break part of agentic deployments.

While security concerns rarely cancel a pilot, offering a new agent the keys to an inadequately secured kingdom absolutely can.

The same goes for legacy systems (32.3%) — while pilots exist in small, siloed environments, real-world deployments have to integrate with outdated software, legacy systems and fragmented IT infrastructure. **AI agents require an environment that's ready for them**, and when these integrations aren't in place, the project is likely to stall.

Primary Bottlenecks Preventing AI Initiatives from Moving to Production



* Because respondents were allowed to choose up to three, total will not add up to 100%

➤ Bucking trends seen in other regions, **security (31.6%) was not the foremost concern among UK respondents**: it was narrowly beaten out by high costs of operation (31.8%), with lack of direction from leadership rounding out the top three. Interestingly, while 95% of respondents reported struggling with at least one bottleneck in their journey from pilot to production, those in the UK suffered comparatively less, reporting fewer bottlenecks overall.

Respondents in the U.S. were significantly more concerned about security and governance (40.2%), but had less difficulty in defining clear use cases (26.4%) compared to the UK and Brazil.

Brazil's meteoric agentic expansion — and the growing pains associated with it — have emerged as a prevailing theme across our entire data set, and responses to this question were no different. **Brazil had the largest percentage of respondents dealing with almost every issue on our list**, particularly security (43.7%) and high costs (39.3%)

But these struggles are paying off: Brazil also had the highest rate of respondents successfully moving to production (5.2%) — five times the number seen in the U.S. This is clear evidence that **Brazilians are pushing through the friction instead of pausing their pilots**.

Primary Bottlenecks Preventing AI Initiatives from Moving to Production **By Country**

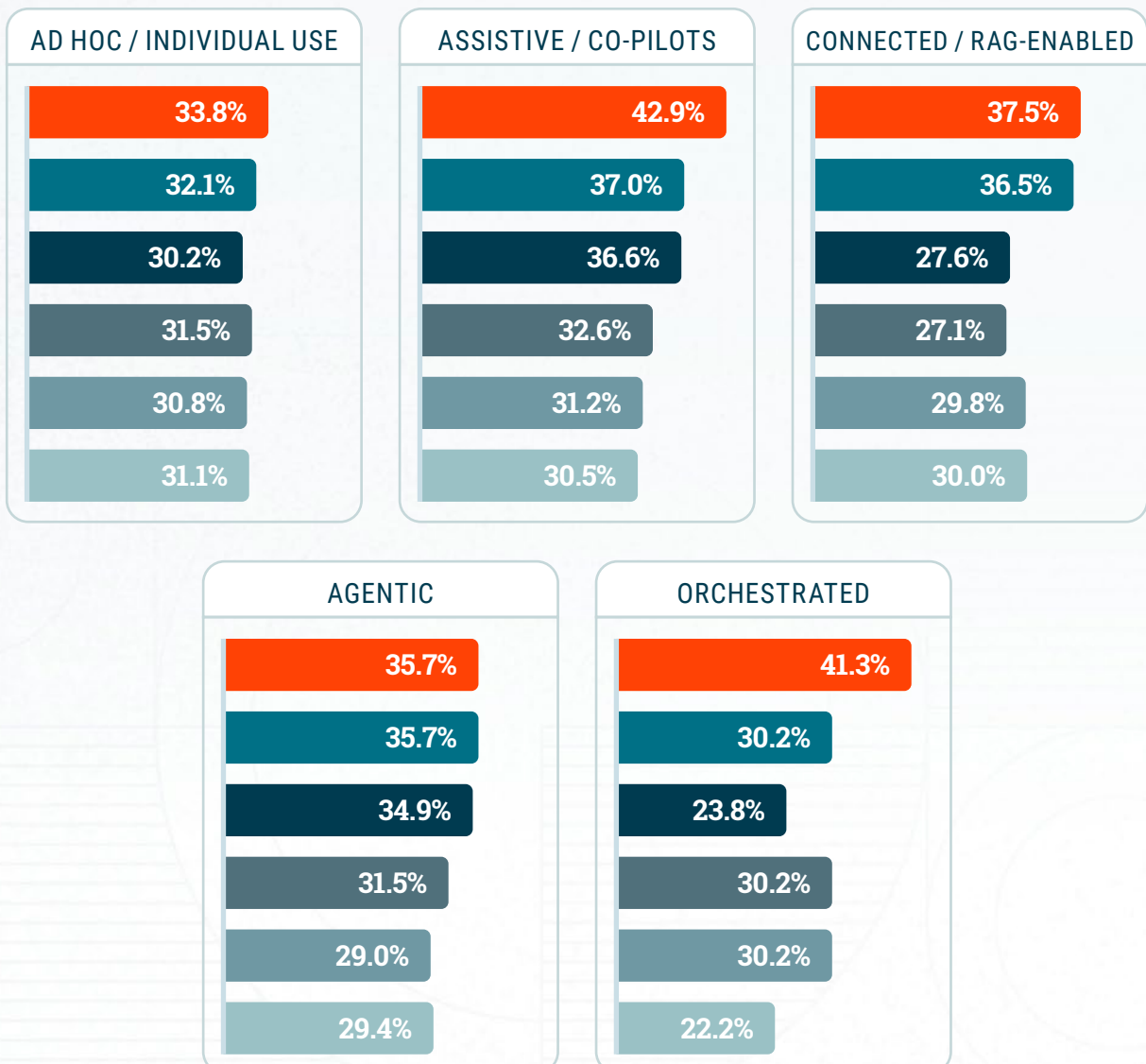
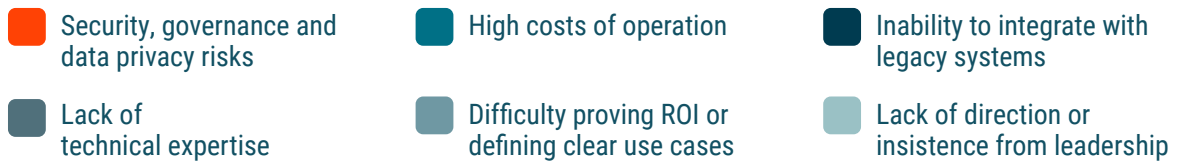
	UK	USA	Brazil
Security, governance and data privacy risks	31.6%	40.2%	43.7%
High costs of operation	31.8%	35.0%	39.3%
Inability to integrate with legacy systems	27.2%	34.8%	34.7%
Lack of technical expertise	27.8%	30.0%	34.3%
Difficulty proving ROI or defining clear use cases	29.2%	26.4%	35.5%
Lack of direction or insistence from leadership	31.0%	31.0%	27.9%
N/A Already moved from pilot to production	2.8%	1.0%	5.2%
None of the above	1.6%	1.0%	3.6%

A look at survey data by maturity level reveals a **strong nadir at the Assistive/Co-Pilots stage**. These respondents reported the highest levels of friction across almost every major bottleneck, as enterprise-wide rollout attempts begin to collide with architectural reality.

There are rewards for those reaching the finish line, however. Among those with an **Orchestrated** ecosystem, the percentage of respondents reporting no bottlenecks at all spikes to 17.5%, up from less than 3% at all other stages.

Interestingly, the rate of respondents **struggling with a lack of technical expertise** remained relatively flat across most maturity stages, with all levels falling within 5% of one another. Clearly **the talent gap remains a persistent issue**, regardless of how advanced AI implementations become.

Primary Bottlenecks Preventing AI Initiatives from Moving to Production **By AI Adoption Stage**



➤ For the bottom three revenue tiers, **security is the number one blocker**. But as these companies make more money, concern about the high cost of operations drops steadily, while difficulty proving ROI increases.

There's an inflection point between upper mid-market businesses and large enterprises, however. Unsurprisingly, the deep pockets of the largest enterprises offer a better chance of moving from pilot to production (13.3%, vs. less than 1% for midmarket.) Because they

have access to **the best security** money can buy, this particular bottleneck drops to 28.9% — and because strong leadership is virtually required for a company to grow to this level, these respondents report a lower rate of lack of leadership direction as well (18.9%).

But for these companies, their size can also prove a liability: **Their biggest bottleneck is the sheer cost of operating AI at massive enterprise scale** (37.8%).

Primary Bottlenecks Preventing AI Initiatives from Moving to Production **By Revenue**

	Small Businesses	Large Enterprises
Security, governance and data privacy risks	39.5%	28.9%
High costs of operation	36.9%	37.8%
Inability to integrate with legacy systems	33.9%	31.1%
Lack of technical expertise	34.5%	24.4%
Difficulty proving ROI or defining clear use cases	27.9%	31.1%
Lack of direction or insistence from leadership	31.2%	18.9%
N/A Already moved from pilot to production	2.6%	13.3%

* For more on how we define business size, see Methodology section.

“A pattern I keep hearing from teams experimenting with agentic AI is that the biggest challenges tend to surface after the demo works. Once agents need to take real action, the complexity shows up quickly. Whether an agent can safely operate inside a real enterprise environment depends much more on the surrounding systems and workflows. **It's a useful reminder that scaling agents is less about clever prompts and more about execution, control and how well the underlying architecture supports change over time.**”

— Cameron Ball
Sales Engineer, Jitterbit

A New AI Agent Every Month

How many autonomous AI agents do you have deployed, and how many do you plan to deploy in the coming year?

The number of AI agents has exploded over the last year — **according to Microsoft**, 80% of Fortune 500 companies now use AI agents built with low-code/no-code tools. (Adoption percentage is likely even higher when combined with other means of obtaining agents.)

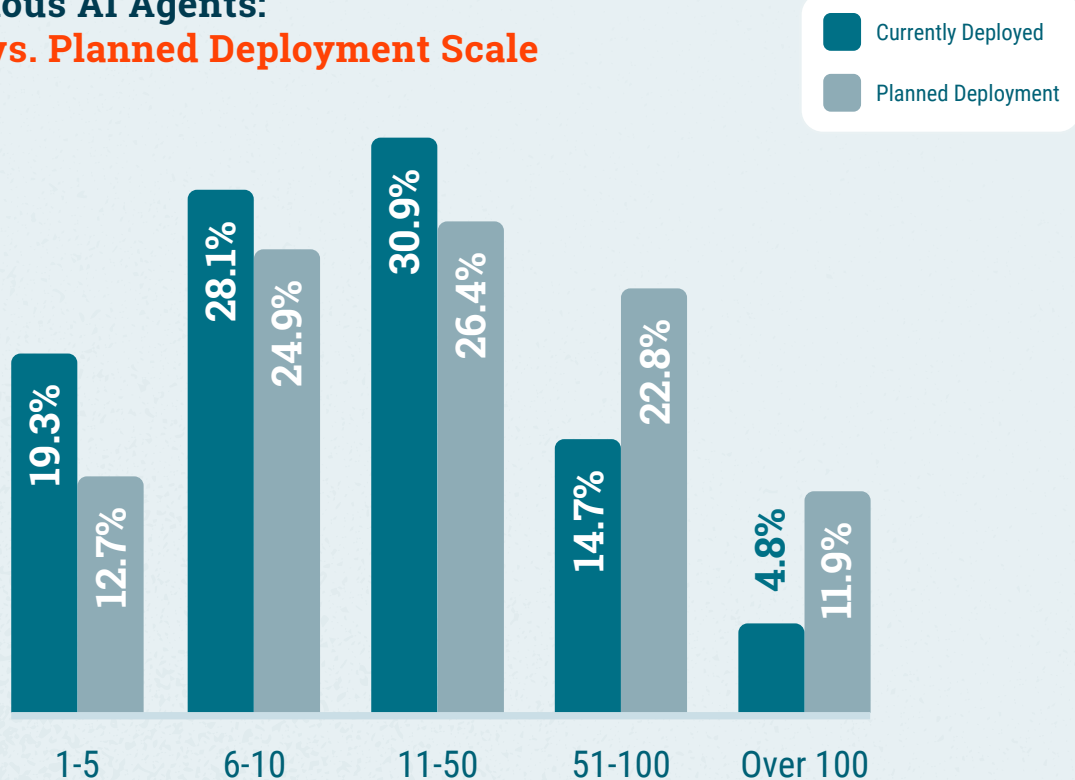
This growth shows up in our data, as well, as organizations speed past small, isolated deployments into massive, coordinated agent ecosystems. The percentage of respondents with 1-5 agents deployed is set to shrink from

20% to just 12.7% over the next year — with a corresponding rise in the share of respondents with 51-100 deployed (from 14.7% to 22.8%).

While still small, the percentage of respondents with over 100 agents is set to more than double, pushing deployments like this from bleeding-edge rarities toward standard operating procedure.

By this time next year, the average number of agents deployed in an enterprise will have grown from 28 to 40 — putting pressure on the last few agentic holdouts, who will see their numbers dwindle from 1.6% to .4% during the same time period.

Autonomous AI Agents: Current vs. Planned Deployment Scale

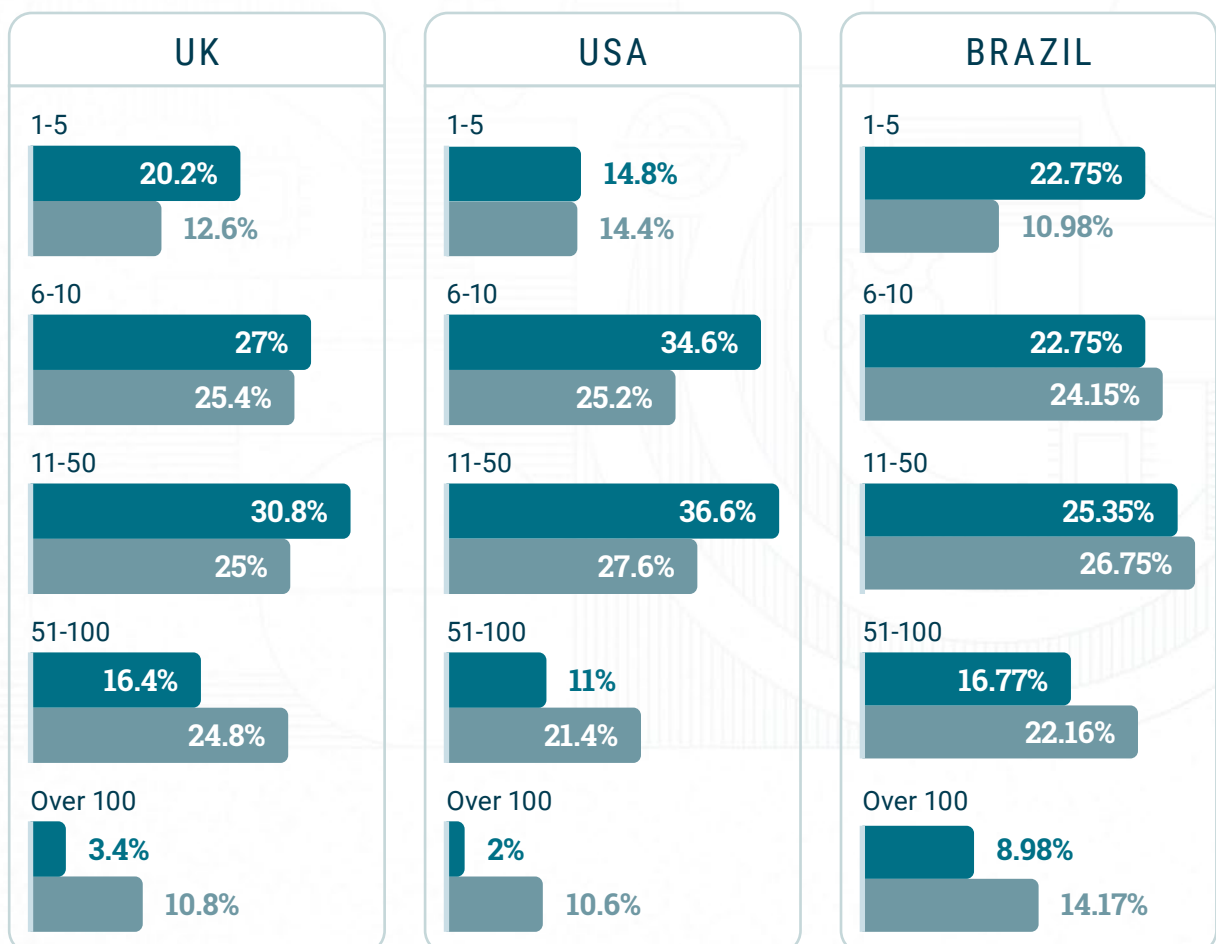


➤ **U.S. enterprise agent count** is currently concentrated in the middle tiers, with nearly three-quarters of deployments grouped in the 6-50 agent range. But by next year, nearly a third of U.S. businesses will be running 51 or more agents, higher than the global average and up from only about 13% today.

But while the UK has so far taken a conservative approach to agents — a massive 78% of their deployments set snugly in the 1-50 agent range — **the share of UK enterprises** in the 100+ tier is set to more than triple from 3.4% to 10.8% in the next year. Those with 51+ agent deployments is expected to jump from less than 20% today up to 35.6%.

Brazil already has the highest percentage of orgs running over 100 agents today (9%, vs 2% in the U.S. and 3.4% in the UK). But their aggressive planned deployments will push the percentage of respondents with 100+ agent deployments to over 14%, and the average number of agents from 32.3 to 42.2.

Autonomous AI Agents: Current vs. Planned Deployment Scale By Country



➤ As expected, the further along a company is in its AI journey, the more aggressively they are planning to multiply their agent workforce over the next year. At the **Agentic** stage, only 4.6% currently have more than 100 agents, but this is expected to nearly quadruple to

20.6%. Those with **Orchestrated** ecosystems, however, are planning an unprecedented expansion. Right now, 9.5% of them run more than 100 agents, already the highest of any group. But in the next 12 months, that number will more than triple, to 28.6%.

Autonomous AI Agents: Current vs. Planned Deployment Scale By AI Adoption Stage

	AD HOC		ASSISTIVE		CONNECTED		AGENTIC		ORCHESTRATED	
	Current	Planned	Current	Planned	Current	Planned	Current	Planned	Current	Planned
1-5	31.5%	17.7%	19.3%	13.0%	13.9%	10.5%	10.5%	10.5%	23.8%	6.3%
6-10	28.5%	31.5%	26.1%	26.1%	30.3%	22.5%	30.7%	20.2%	20.6%	15.9%
11-50	21.6%	26.2%	33.3%	25.1%	33.0%	26.3%	36.6%	28.2%	22.2%	33.3%
51-100	9.8%	15.4%	15.1%	25.1%	15.3%	29.2%	17.2%	19.7%	22.2%	12.7%
Over 100	3.6%	6.9%	3.8%	9.8%	6.4%	10.5%	4.6%	20.6%	9.5%	28.6%

When the data is **divided by company revenue**, small businesses show a large-scale migration out of the 1-5 agent pilot phase (dropping from 24.3% to 14.8%). But the corresponding rise isn't among the 6-10 agents tier or even the 11-50 tier, both of which saw a slight dip. Remarkably, these businesses demonstrated much bigger plans, with the percentage planning to deploy 50-100 agents jumping from 11.7% to 19.3%, and **the percentage deploying more than 100 agents nearly tripling.**

For small businesses, doubling their deployment of AI agents isn't just an efficiency play; it's a **survival strategy** that can allow a 30-person startup to operate with an output and customer presence approaching that of its 300-person competitors.

At the other extreme, large enterprises, who already lead the pack in current deployments (with 16.7% of them already running over 100 agents) are expecting explosive growth: **Nearly half plan to deploy over 100 agents in the coming year.** When combined with the 51-100 tier, this means that 72.2% of all massive enterprises will be running highly scaled, **50+ agent ecosystems by 2027.**

This scale of growth requires a fundamental architectural shift. These aren't 100 isolated chatbots; they require a **multi-agent orchestration control** plane where a procurement agent, a legal agent and a finance agent can securely and autonomously collaborate to execute end-to-end workflows.

➤ What a Difference 6 Months Can Make

“Most agentic AI projects right now are early stage experiments or proof of concepts that are mostly driven by hype and are often misapplied. This can blind organizations to the real cost and complexity of deploying AI agents at scale, stalling projects from moving into production. **They need to cut through the hype to make careful, strategic decisions about where and how they apply this emerging technology.**”

— Anushree Verma

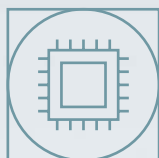
Senior Director Analyst, Gartner®, in June 2025

Total active agents will exceed 1 BILLION in 2029.

— IDC

➤ Vertical Trendlines

Top 3 industries for current AI agent deployment:



32

Software/Tech



31.5

Banking/Finance
/Insurance



30.5

Legal

Bottom 3 industries for AI agent deployment:



19

Architecture
/Engineering
/Building



21.6

Healthcare



25

Travel/Transport

Industry with the biggest plans for AI agent deployment:

Higher Ed, where respondents expect to deploy **49 AI agents** in the coming year.



49
AI AGENTS

From Customer Chats to Crafting Code

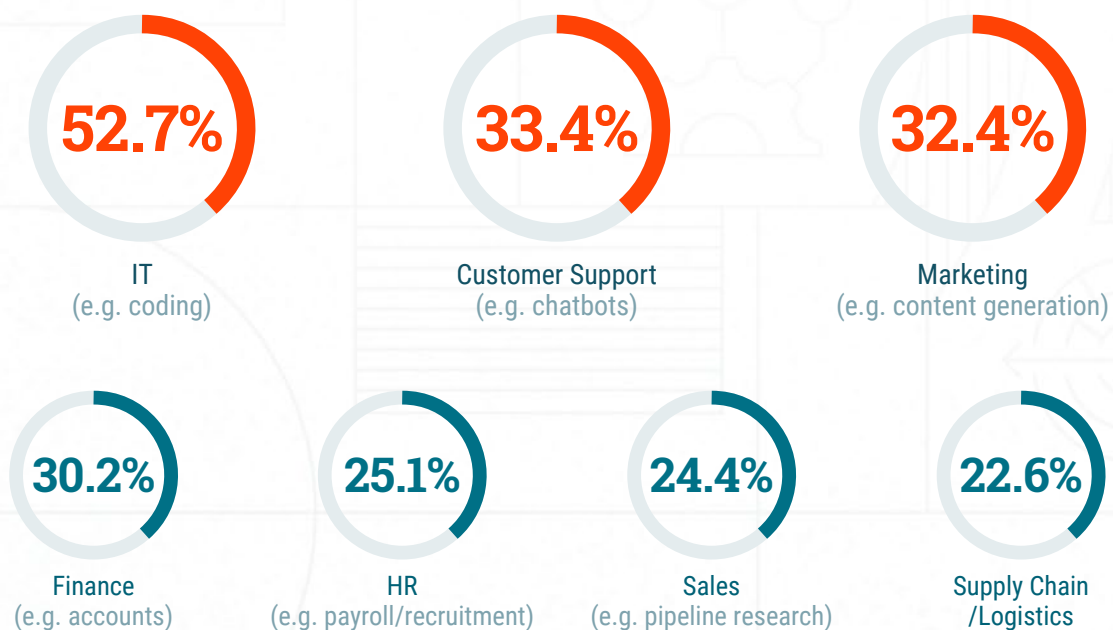
In which functions, if any, are these AI agents delivering most business value?

Just one year ago, we reported that 31% of 2025 survey respondents were “already planning for agentic AI.” **Our 2026 survey data shows massive progress** made on this front, as a majority of businesses have not only passed through the planning phase, but have deployed agents that are demonstrating real business value.

Currently, the bulk of this value is in IT, with over half of all respondents reporting that they’re seeing the most value from coding tools. Perhaps unsurprisingly — given the proliferation of customer-facing AI and the popularity of marketing tools such as Canva — the **Customer Service and Marketing functions round out the top three**, with 33.4% and 32.4% respectively.

Two notable trends emerge from the rest of the data. Out of 1,498 respondents that have deployed them, **only two respondents reported seeing no value from their AI agents**. What’s more, if you add up the total percentages for the rest of the graph, you get 220.8% — indicating that on average, respondents are seeing value from at least two functions.

Functions Currently Delivering Most Business Value from AI Agents



** Because respondents were allowed to choose up to three, total will not add up to 100%*

While the **UK's overall numbers are slightly lower than their global peers**, these respondents are finding significant value in **Customer Support** (30.7%), indicating that UK businesses have successfully deployed agentic chatbots that are already effectively handling triage and resolving actual customer tickets.

As you might expect from the birthplace of the tech industry, **the U.S. is seeing massive value in IT** (52.2%), but respondents also reported strong, consistent value across Marketing, Finance and HR – indicating a successful horizontal deployment strategy where multiple back-office functions are being automated simultaneously.

But once again, **Brazil is setting the pace, with massive returns reported in IT** (63.1%), Customer Support (42.7%) and Marketing (42.5%). Current business value here is significantly outpacing the already high expectations they had (see page 41), showing once again that their aggressive adoption strategy is paying off.

Functions Currently Delivering Most Business Value from AI Agents **By Country**

	UK	USA	Brazil
IT (e.g. coding)	42.7%	52.2%	63.1%
Customer Support (e.g. chatbots)	30.7%	26.7%	42.7%
Marketing (e.g. content generation)	24.8%	29.7%	42.5%
Finance (e.g. accounts)	28.7%	29.1%	32.7%
HR (e.g. payroll/recruitment)	25.3%	26.9%	23.2%
Sales (e.g. pipeline research)	22.6%	25.5%	25.0%
Supply chain / Logistics	20.0%	22.9%	25.0%

Our data clearly shows how **real-world business value shifts** as organizations mature in their AI capabilities, with some functions providing immediate value out of the gate and others requiring complex orchestration to truly pay off.

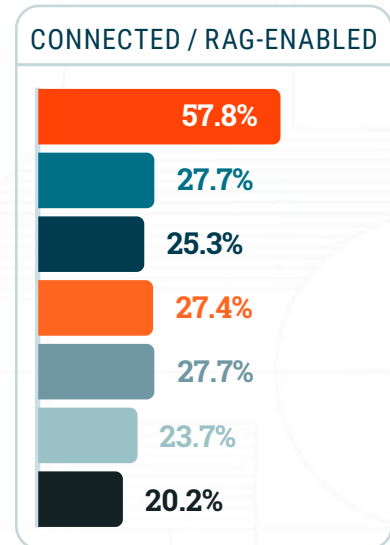
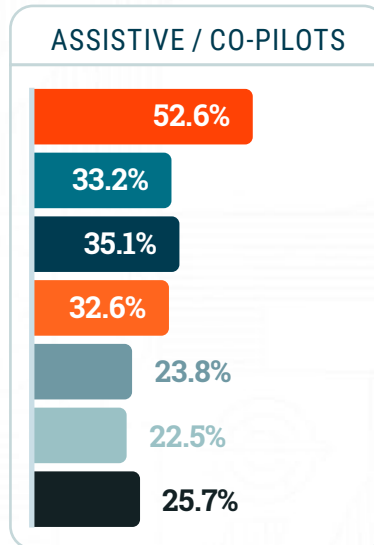
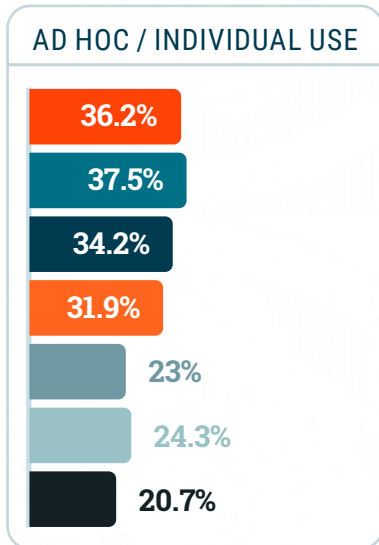
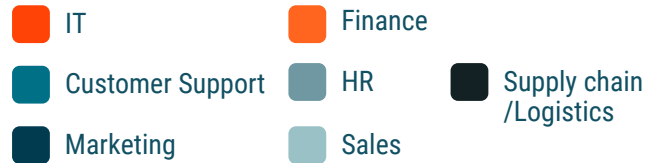
For example, the jump in real business value for IT and coding at the highest maturity level is significant. While **Agentic** orgs already saw a large percentage of value here (58.8%), moving to the final, orchestrated stage sees IT value rocket to 79.4%. This suggests that, while AI coding assistants are helpful early on, **the real value comes when AI agents can collaborate**

across IT systems to autonomously manage infrastructure, test code and deploy software end to end.

In contrast, **Customer Support provides high value during the Ad Hoc phase** (37.5% – likely individual agents using ChatGPT for drafting responses), then dips significantly as organizations try to wire it into internal data during the “Connected” stage (27.7%). However, truly autonomous, integrated support agents are highly effective once the backend architecture is perfected: When respondents reach full orchestration, the value shoots back up to 46%.

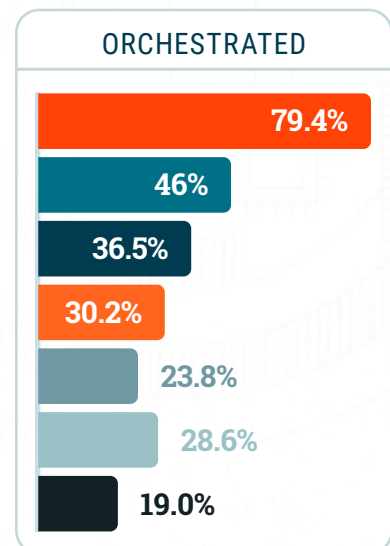
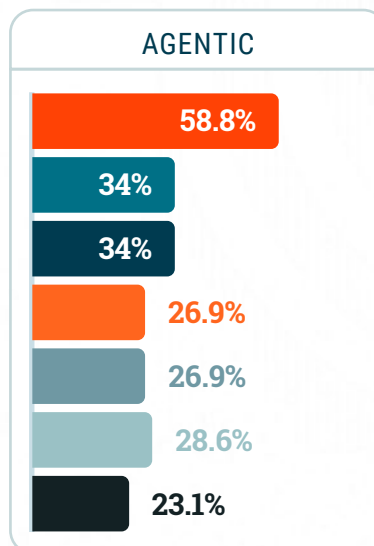
- The **Marketing** function experiences a noticeable drop in value during the Connected / RAG-enabled stage (falling to 25.3%, from 35.1% in the Assistive phase). **This might reflect the friction marketing teams face when trying to transition from simply generating standalone text to generating highly accurate, data-grounded content linked to live internal CRM data.**

Functions Currently Delivering Most Business Value from AI Agents By AI Adoption Stage



One thing that didn't make much difference in which functions were seeing the most value: Company size.

Among the smallest three revenue bands, the top functions seeing value remained remarkably consistent, with IT, Customer Support and Marketing ranking in the top 3. Likely due to the complexity of budgeting among the largest enterprises, Finance (28.9%) narrowly edged out Marketing (27.8%), but IT and Customer Support remained on top.



Company size did impact how likely a company was to see value in IT, however. Among the smallest companies, just under half (48.8%) saw more value in IT. But as the size of the company grows, its dependence on IT agents rises sharply, to 50.7% and 59.8% in the middle two revenue groups. Among the largest enterprises, more than three-quarters (78.9%) reported seeing high value in IT.

Past the Point of No Returns

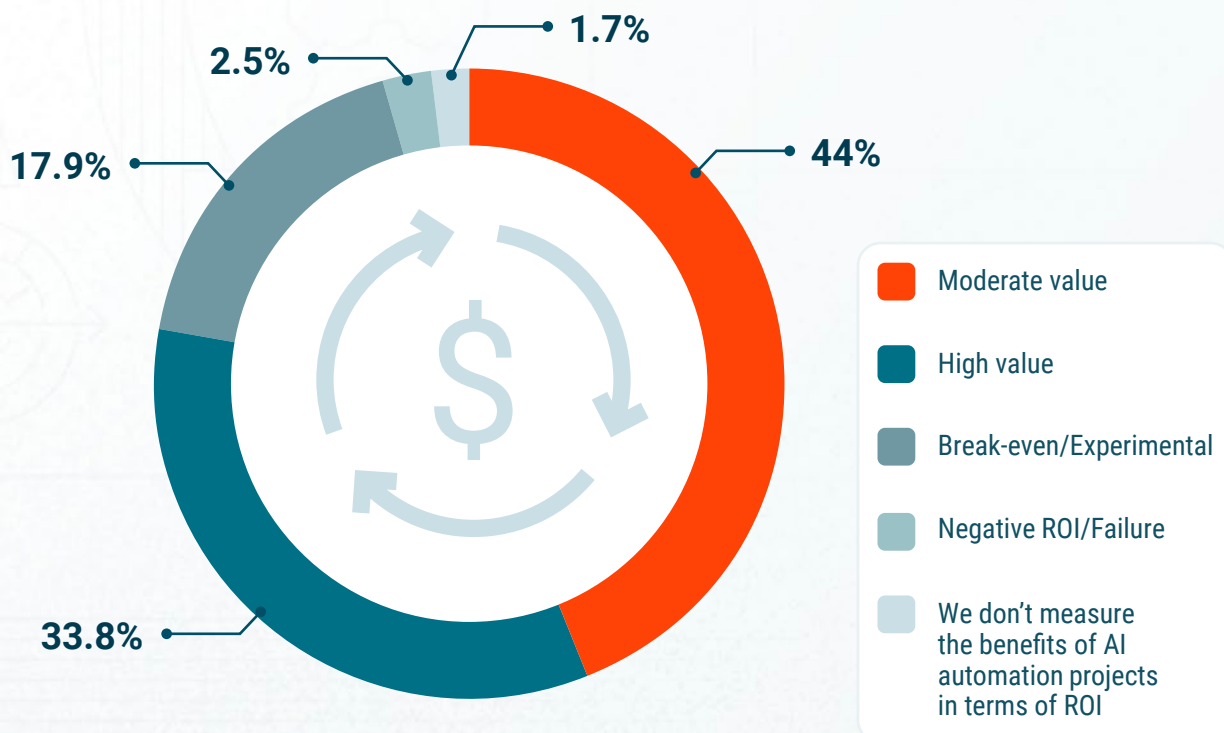
How would you characterize the ROI of your AI automation projects to date?

Enterprise AI hype has successfully transitioned into tangible reality. Based on our 2026 survey data, an overwhelming majority of organizations — nearly 78% — report that their **AI automation projects are delivering visible business value**. With failures at just 2.53%, investing in agentic AI has shifted from high-risk gamble to reliable driver of enterprise transformation.

This data shows a clear maturation curve across the market. **The largest percentage of respondents (44.04%) are now seeing moderate value from their AI automation projects** — in other words, they're seeing operational efficiency gains but are still waiting for financial ROI to fully materialize. But for another third of the market, these returns have already arrived in the form of significant financial savings or revenue increases.

It's worth noting the shrinking footprint of the "experimental" phase. **Only about 18% of companies report still being in the break-even or learning stage**. Combined with the low percentage of respondents reporting project failure, this suggests that companies as a whole have figured out how to leverage automation to streamline operations.

Characterization of AI Automation ROI to Date



➤ The regional breakdown reveals distinct maturity profiles and success rates for AI projects.

The **U.S.** is currently leading in terms of translating AI deployments into actual financial results: 38.2% of U.S. enterprises report “High value” realization, meaning they have successfully achieved measurable cost savings or revenue gains.

Conversely, the **UK** represents a much more conservative, steady adoption curve. But while nearly half of UK respondents (49.6%) fall within the moderate value band, this cautious, highly governed approach has a major upside: the UK boasts the lowest project failure rate globally (1.2%).

As we reported elsewhere, **Brazil** is aggressively building massive, 100+ agent ecosystems. But due to more recently starting their agentic transformation, Brazil also reports the highest rates of experimentation (22.4%) and outright project failure (3.6%). As is also typical of more recent adopters, they have the highest percentage of companies not even tracking traditional ROI (4%). In other words, agentic transformation in Brazil is moving incredibly fast, prioritizing massive scale and structural transformation over immediate, formalized financial returns.

Characterization of AI Automation ROI to Date **By Country**

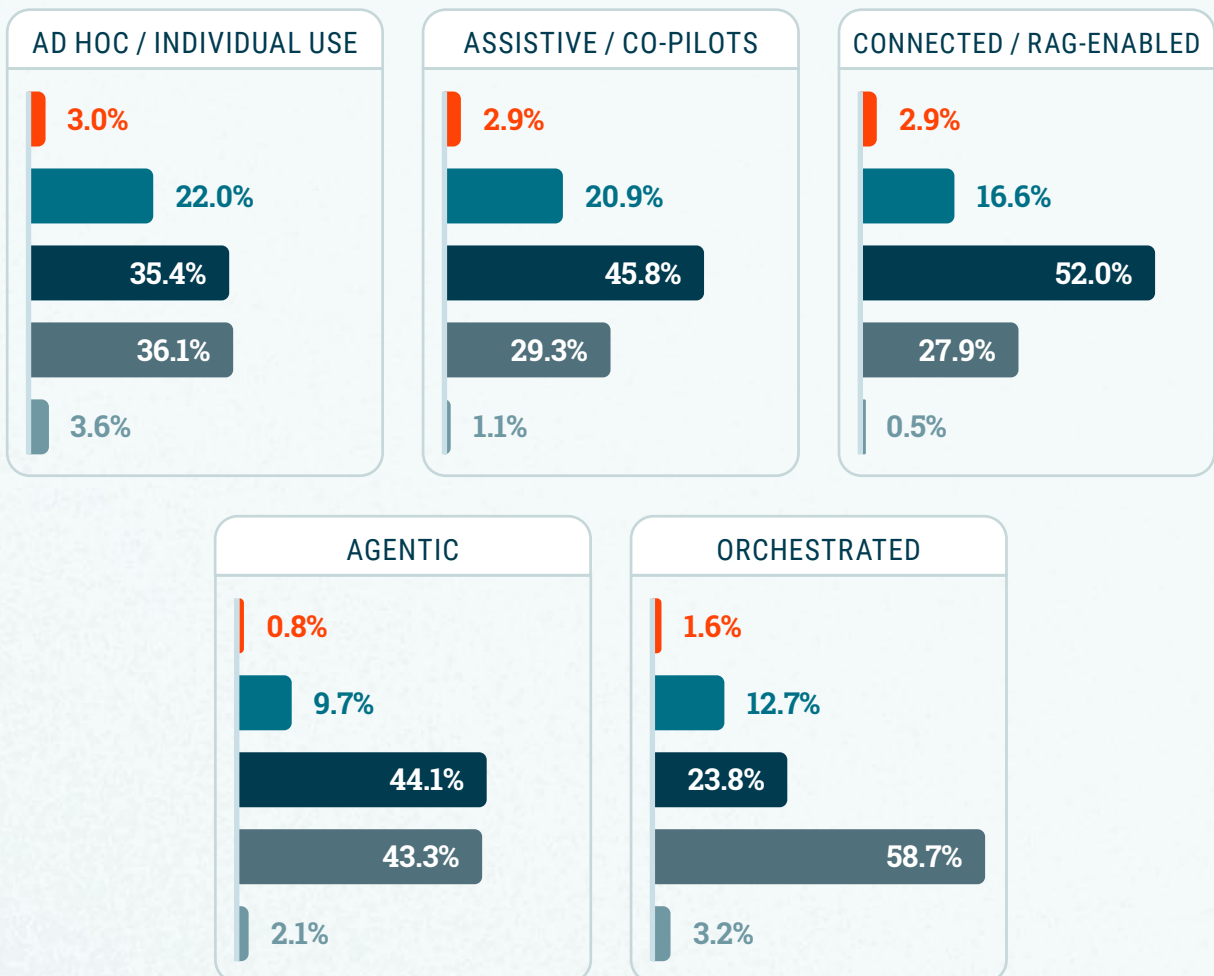
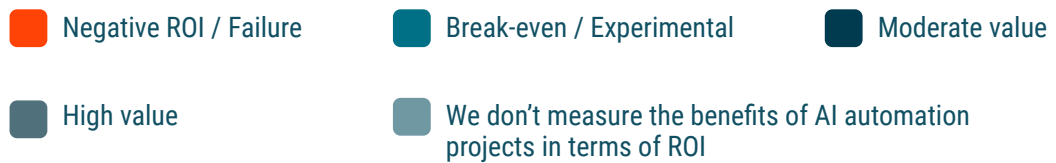
	UK	USA	Brazil
Negative ROI / Failure	1.2%	2.8%	3.6%
Break-even / Experimental	16.4%	15.0%	22.4%
Moderate value	49.6%	43.6%	38.9%
High value	32.0%	38.2%	31.1%
We don't measure the benefits of AI automation projects in terms of ROI	0.8%	0.4%	4.0%

As organizations move from individual Ad hoc use into the middle stages of adoption — specifically **Connected / RAG-enabled** — they hit an interesting plateau. Connected respondents report the **highest level of moderate value** in the entire survey (52%), but the lowest level of high value (27.9%).

But once an organization reaches the **Orchestrated** ecosystem level, **moderate value plummets** to just 23.8%, while high value spikes to 58.7%. Among companies that have integrated agents with APIs to perform tasks autonomously, a full 87% saw moderate or high value delivered by their AI automation projects.

➤ What's more, **the data shows that as organizations mature, their risk profiles shrink dramatically.** Companies in the Agentic and Orchestrated stage report the lowest project failure rate in the survey, as well as the lowest percentage of respondents stuck in the break-even / experimental phase. By the time an enterprise is building action-oriented agents and orchestrating them via APIs, they've figured out how to make these projects work, and can do so reliably.

Characterization of AI Automation ROI to Date By AI Adoption Stage



- When we filter this ROI data by an organization's revenue tier, a stark reality emerges: the largest financial returns of the AI revolution disproportionately flow to the top of the market.

Among the **largest global enterprises**, 54.4% report achieving **high value** from their AI investments. While this completely dwarfs every other revenue bracket, it also comes with an inherent risk tolerance: this same group also reports the **highest project failure rate** in the entire survey (4.4%). These companies have the immense capital required to push through complex legacy integrations, absorb early failures, and ultimately propel their AI ecosystems to massive financial profitability.

Among companies in the **two smallest revenue bands**, however, we see a distinct ceiling. These organizations are heavily clustered in the moderate value category, which peaks at 48% for the lower mid-market tier. In other words, they're **successfully deploying AI to make their employees faster and more efficient** — but they **currently lack the budget and technical resources** required to orchestrate the sort of end-to-end autonomous processes that generate significant financial returns. For the time being, ROI is stuck at the “productivity boost” level, rather than as a true bottom-line driver.

Characterization of AI Automation ROI to Date **By Revenue**

	Small Businesses	Lower Mid-Market	Upper Mid-Market	Large Enterprises
Negative ROI/Failure	2.8%	1.1%	3.2%	4.4%
Break-even/Experimental	17.9%	19.9%	16.9%	12.2%
Moderate value	46.0%	48.0%	36.5%	27.8%
High value	30.6%	30.5%	42.9%	54.4%
We don't measure the benefits of AI automation projects in terms of ROI	2.7%	0.5%	0.5%	1.1%

* For more on how we define business size, see Methodology section.

“After the initial AI hype, enterprises will shift from experimentation to operationalization, and the conversation will change. Security concerns will take center stage: data leakage risks from LLMs, shadow AI usage, legal exposure from unclear model provenance, and demands for vendor transparency around training data and model lineage. And ROI will continue to grow in importance.

AI will succeed only when tied to reduced process cycle times, lower labor costs for repetitive tasks, improved customer satisfaction, and tangible revenue lift. AI will finally move from “cool demos” to delivering quantifiable business value.”

— Manoj Chaudhary, CTO, Jitterbit

Budget Not Blocking Agentic Automation

What are the main challenges preventing end-to-end agentic automation across your enterprise, if any?

In last year's survey, when we asked about the most important factors in choosing an automation platform, more than half our respondents (56%) said "end-to-end automation" — outpacing scalability, cost value, security and even AI capabilities.

But if the desire for end-to-end automation is so strong, why are more than 95% of companies still struggling with it in 2026?

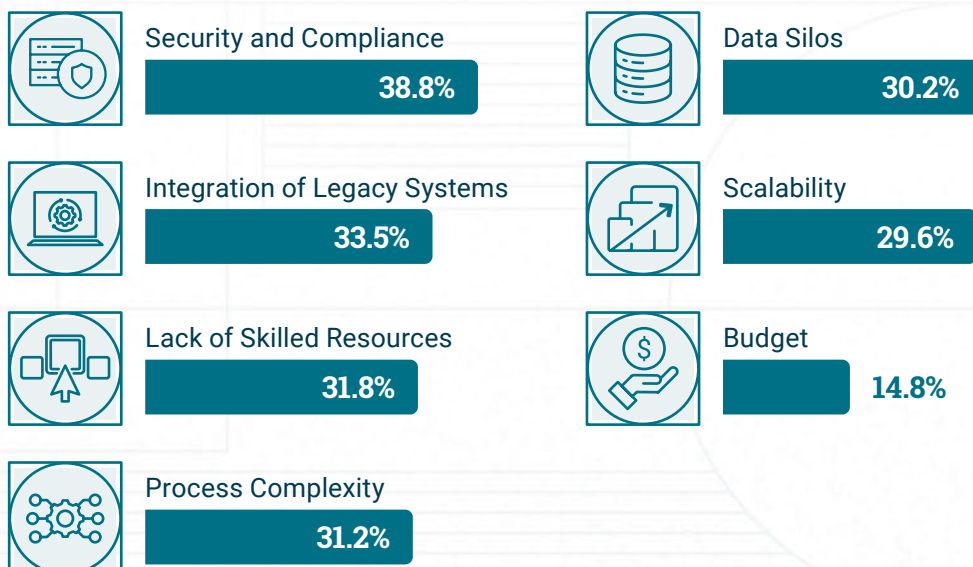
According to the respondents to this year's survey, **security and compliance was the top-cited reason**. With news about the risks of OpenClaw, Deepseek and others appearing in alarmist headlines and making ripples across the security community, companies in 2026 are taking a significantly less "fools rush in" approach to AI compared with previous years.

The **maturity of AI technology** plays a role here, too: **When AI agents move from "reading and summarizing" to taking autonomous action**, the risks multiply. Enterprises are struggling to govern agent identities, audit

multi-agent decision paths and ensure compliance with strict new regulations like the EU AI Act.

Interestingly, even with tightening belts across the corporate sector, budget (14.8%) still sits near the bottom of the list, just as it did last year. Given the seemingly endless appetite for AI adoption, how is this possible? Despite new tools and capabilities that have driven total AI spending up significantly in the past year, these investments are paying off (see page 28) and as a recompanies are increasing their budgets accordingly (see page 40).

Main Challenges Preventing End-to-End Agentic Automation



➤ The themes in regional data here echo findings found elsewhere in our data: **The faster things scale, the more things you break.**

Brazil dominates the global markets in planned, large-scale 100+ agent deployments. But this hyper-growth has come at a cost: Brazilian respondents report the highest level of challenges across *almost every single category*, including security and compliance (42.1%), process complexity (36.5%) and lack of skilled resources (35.7%)

But while these respondents' self-reported struggles may be mighty, so are the victories. The country has the highest percentage of organizations claiming they have fully achieved end-to-end automation (6.4%) — suggesting that a small group of Brazilian tech leaders have solved the puzzle, and the rest of the country is running full-tilt after them, crashing through major architectural and talent roadblocks along the way.

While Brazil pushes bullishly into the future, the **UK is struggling to deal with the past: integration of legacy systems** is proportionately more often cited as a struggle here than anywhere else, compounding the same security and compliance issues faced by respondents across the board.

Main Challenges Preventing End-to-End Agentic Automation **By Country**

	UK	USA	Brazil
Security and Compliance	35.2%	39.2%	42.1%
Integration of Legacy Systems	33.0%	31.4%	36.1%
Lack of Skilled Resources	26.2%	33.4%	35.7%
Process Complexity	29.0%	28.2%	36.5%
Data Silos	26.6%	31.6%	32.3%
Scalability	27.2%	30.6%	31.1%
Budget	14.4%	12.2%	17.8%

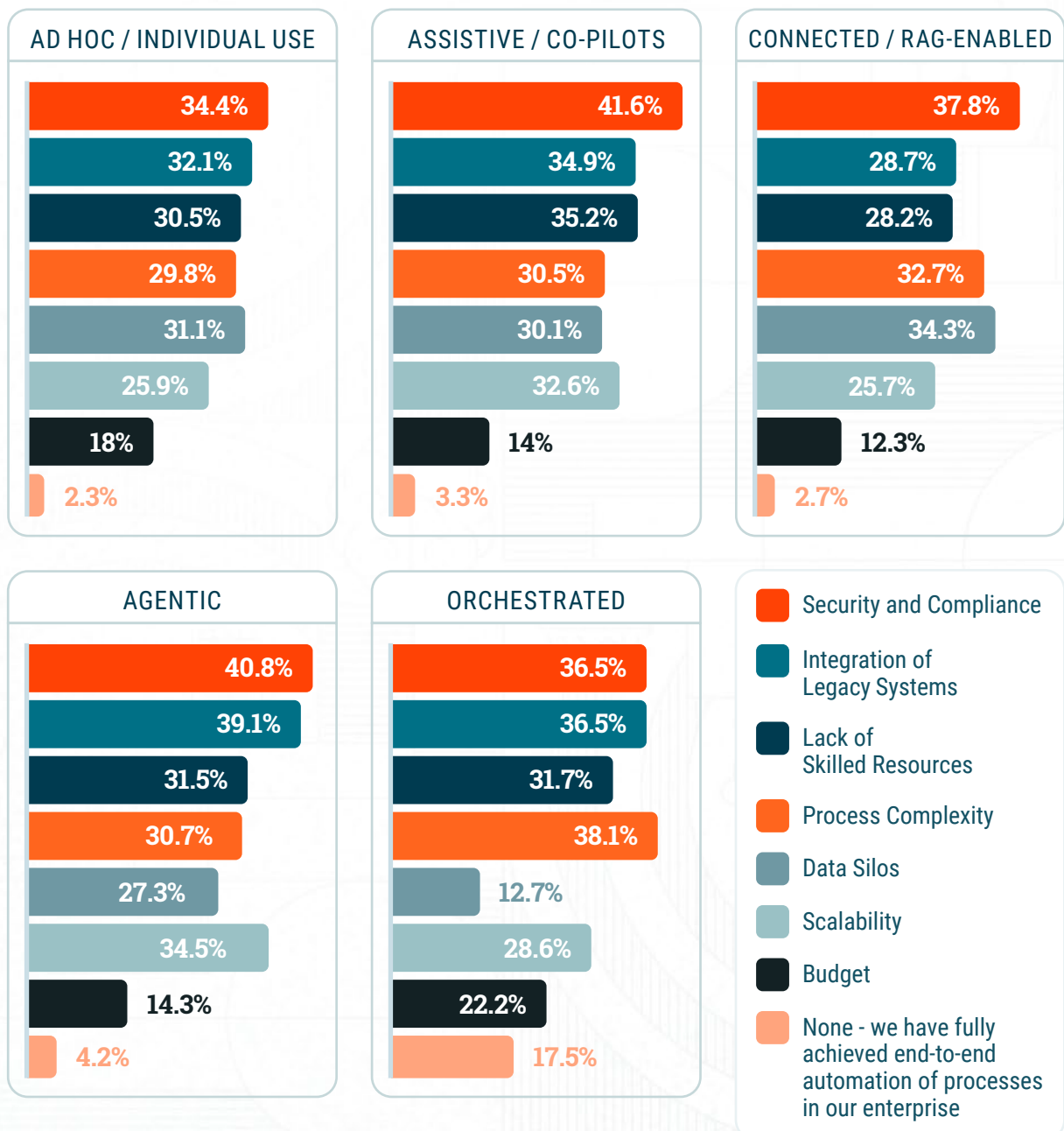
As a company moves toward AI maturity, it tends to deal with issues in a set order, encountering **newer and more complex challenges** once the previous one is solved. For example, at the **Agentic stage**, companies move from simply asking AI for answers to telling the AI to do things via APIs. It soon becomes clear that old, on-prem systems often don't have reliable REST APIs — and just like that, integration of legacy systems spikes dramatically (39.1%).

➤ By the time companies reach **Orchestrated** maturity, the percentage struggling with data silos drops to just 12.7% — which makes sense, given that data silos themselves are a roadblock to maturity. But that doesn't mean it's smooth sailing for these respondents: As other problems fall by the wayside, these mature organizations see a **spike in process complexity** (38.1%) as they attempt to automate the last remaining processes. Left to the end, these processes are often convoluted, undocumented or heavily reliant on human intervention, and mature companies are faced with the possibility of having to rebuild these processes from the ground up.

All this work does pay off, however, as we can see at the bottom of the chart. For the first four stages of AI adoption, only 2% to 4% of organizations claim to have fully achieved end-to-end automation. But at the Orchestrated tier,

this number spikes to 17.5%. In other words, while building an orchestrated ecosystem is difficult, nearly 1 in 5 organizations that get there have successfully deployed friction-free, end-to-end agentic automation today.

Main Challenges Preventing End-to-End Agentic Automation By AI Adoption Stage



- **Security and compliance** was cited as a top challenge across all revenue bands, and it was cited as *the* top challenge in three out of four: Among upper mid-market businesses, integration of legacy systems narrowly edged it out (36.5% vs. 39.3%).

Main challenges Preventing End-to-End Agentic Automation By Revenue

	Small Businesses	Lower Mid-Market	Upper Mid-Market	Large Enterprises
1	Security and Compliance	Security and Compliance	Integration of Legacy Systems	Security and Compliance
2	Lack of Skilled Resources	Integration of Legacy Systems	Security and Compliance	Process Complexity
3	Process Complexity	Data Silos	Process Complexity	Integration of Legacy Systems
4	Integration of Legacy Systems	Scalability	Lack of Skilled Resources/ Scalability (tied)	Lack of Skilled Resources
5	Scalability	Lack of Skilled Resources	Data Silos	Scalability /Data Silos (tied)

* For more on how we define business size, see Methodology section.

One thing missing from all these lists? Budget. Among respondents at every income level, budget was the least of their worries, showing definitively that complexity — not cost — is slowing automation initiatives.

“**By 2026, the rise of agentic AI systems will make it even more critical to establish clear guardrails and oversight.**

These systems could deliver remarkable efficiency and innovation, but without defined operational boundaries and rigorous monitoring, they risk acting unpredictably or making decisions that have unintended consequences.

Integration, orchestration and human-in-the-loop oversight will remain essential, serving as the levers that allow organizations to safely deploy agentic AI while ensuring it complements human judgment rather than undermining it. The companies that succeed will be those embedding autonomy responsibly, balancing ambition with accountability.”

— **Bill Conner**, President & CEO, Jitterbit

➤ New Year, Same Requirements

While the past year has brought unprecedented change to the tech landscape, **our data shows some things never change.**

Top barriers to end-to-end automation in 2025:

1

Security and Compliance

2

Legacy System Integration

2

Process Automation and Complexity
tied for 2nd

3

Scalability

4

Shortage of Expertise

Top barriers to end-to-end automation in 2026:

1

Security and Compliance

2

Integration of Legacy Systems

3

Lack of Skilled Resources

4

Process Complexity

5

Data Silos

6

Scalability

7

Budget

ROI Expectations High Across the Board

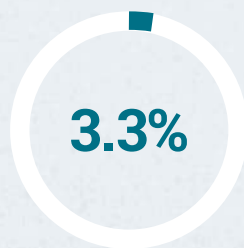
Looking ahead, what are your expectations for the ROI of your AI automation in the next 12 months and beyond?

In his **2026 trend forecasting blog**, Jitterbit CEO Bill Conner predicted, “ROI will become the decisive factor. Companies will no longer green-light AI projects simply because they ‘*feel innovative*.’ **Success will require measurable productivity gains, operational savings, or clear revenue outcomes.**”

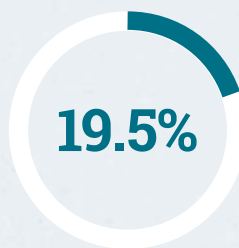
Based on our most recent survey data, this prognostication is already coming to pass. **Only .8% of respondents reported not planning for ROI at all**, signaling the death of the “throw it at the wall and let’s see if it sticks” era and ushering in **ROI that isn’t just measured, but also forecasted.**

Among respondents, the overwhelming majority is highly **optimistic about their AI investments**. Combined, more than 76% expect to see moderate or high value from their AI automation — suggesting that AI has surpassed the hype and will continue moving toward tangible, measurable returns.

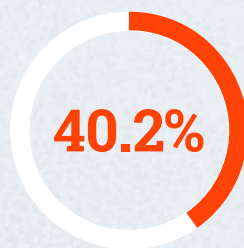
Expected ROI of AI Automation in the Next 12 Months and Beyond



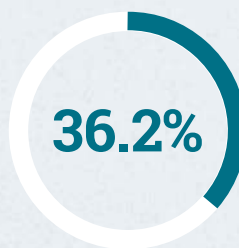
Negative ROI
/Failure



Break-even
/Experimental



Moderate value



High value

➤ The **UK** shows a unique distribution. While they have the highest percentage of respondents expecting moderate value (50.6%), they also have the lowest percentage expecting break-even/experimental outcomes (12.8%). In other words, **UK organizations have largely moved past the “experimental” phase and are seeing stable, moderate returns on their AI projects.**

The **U.S.** stands out for having the highest percentage of organizations still in the break-even / experimental phase (24.2%). Given the sheer volume of AI initiatives in the U.S., it appears **a larger portion of their portfolio is currently in a “wait and see” mode compared to the UK and Brazil.**

Brazil leads the pack in optimism, with 43.1% of respondents **expecting high value** — nearly 10 points higher than the other regions. However, they also have the highest percentage of respondents who don’t measure benefits in terms of ROI (2%). This matches their previous “Maverick” profile: aggressive, high-value expectations, often paired with less conventional measurement or governance frameworks.

Expected ROI of AI Automation By Country

	UK	USA	Brazil
Negative ROI / Failure	3.60%	2.40%	3.99%
Break-even / Experimental	12.80%	24.20%	21.36%
Moderate value	50.60%	40.40%	29.54%
High value	33%	32.60%	43.11%

As we previously saw for current ROI, there’s a significant maturity dividend at play — the more integrated and autonomous an organization’s AI becomes, **the more the ROI shifts from moderate to high.**

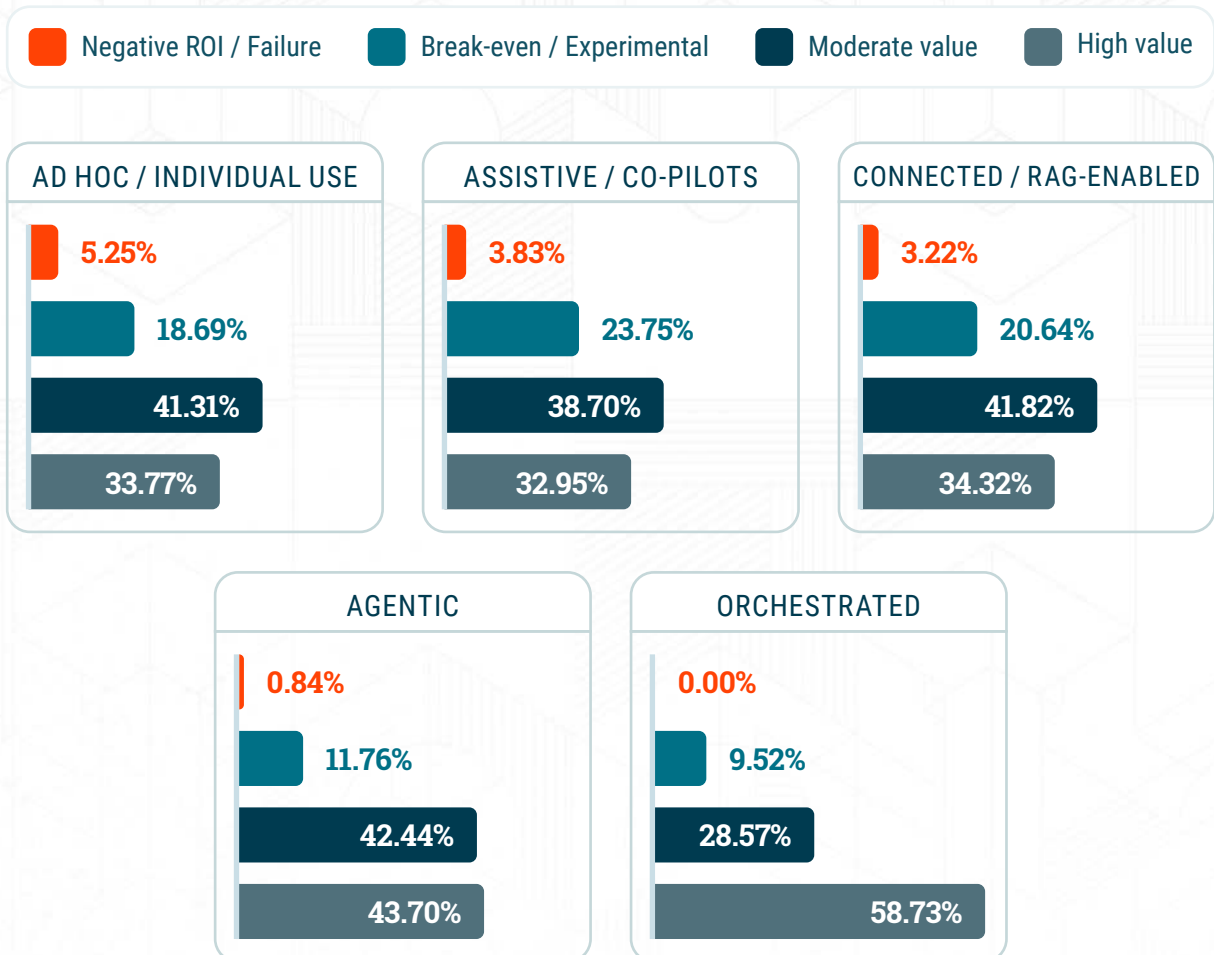
Organizations that have reached the **Orchestrated level see a massive spike in anticipated value.** Nearly 6 out of 10 expect high ROI — nearly 25 points higher than those in the earlier Ad hoc or Assistive stages.

Crucially, 0% of Orchestrated organizations report negative ROI, suggesting that once you solve the orchestration challenge, success is almost guaranteed.

The Assistive stage, on the other hand, appears to be the most frustrating, with the highest percentage of respondents sitting in the break-even / experimental bucket (23.8%). This aligns with earlier data showing that this stage faces the most friction with security and legacy integration; until those hurdles are cleared, the value remains “trapped” in an experimental state.

- Interestingly, there's a **significant jump in high-value expectations** when moving from **Connected / RAG** (34.3%) to **Agentic / Action-oriented** (43.7%). Giving AI the power to actually do tasks (action-oriented) rather than just find information (RAG-enabled) is clearly a major value lever.

Expected ROI of AI Automation **By AI Adoption Stage**



Expected ROI of AI Automation **By Revenue**

	Small Businesses	Large Enterprises
Negative ROI / Failure	3.9%	2.22%
Break-even / Experimental	22.0%	12.22%
Moderate value	40.5%	18.89%
High value	32.4%	66.67%

**For more on how we define business size, see Methodology section.*

The data across revenue tiers highlights a similar “**success at the top**” story. Nearly two-thirds of **large enterprises expect high value** — the highest of any group surveyed. This shows that at large scale, AI’s ability to drive efficiency and orchestrate complex processes translates into **massive financial value that smaller firms can’t yet unlock.**

Great Expectations

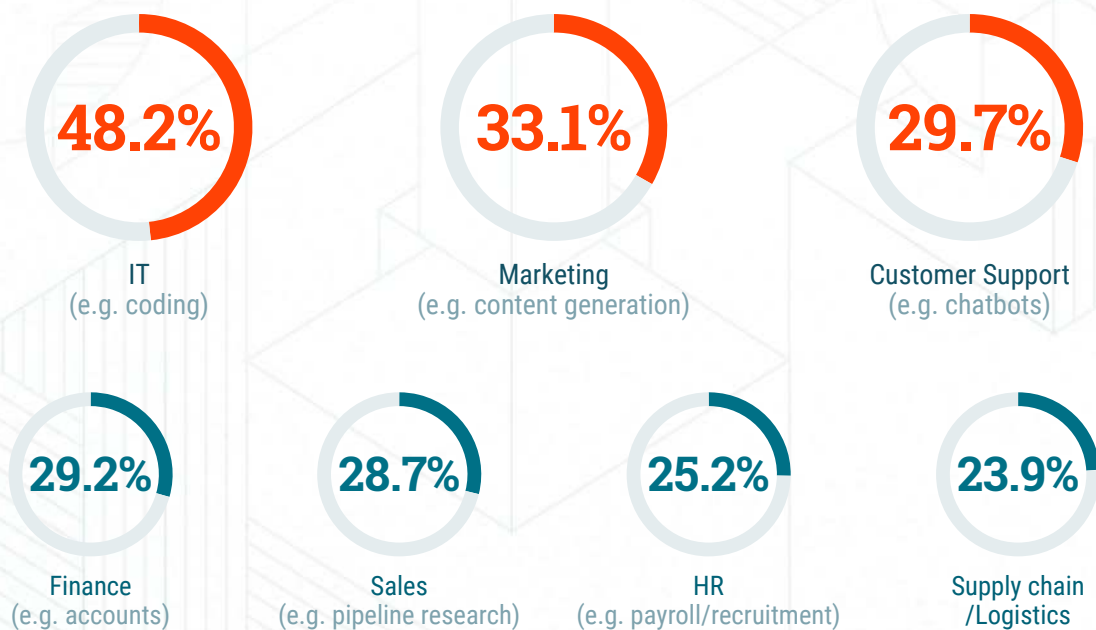
In which functions, if any, do you anticipate these AI agents will deliver the most business value?

To find out where AI is expected to deliver the most value over the next year, we went straight to the source: According to Google AI Mode, **AI agents will deliver the most business value in software development (coding/reviews), finance (reconciliations) and customer engagement.**

The data from our **2026 Jitterbit AI Automation Benchmark** survey corroborates this. The largest percentage of respondents, 48.2%, expect to **continue seeing the most value from AI in IT departments**. Because IT departments (ideally) offer clean, structured data such as codebases and systems logs, AI agents can seamlessly orchestrate tasks such as **bug fixes, testing and deployment**.

What about less mature use cases? **Sales and Supply Chain/Logistics are two of the functions where current value remains near the bottom**, but anticipated future value is higher. While these use cases aren't delivering tremendous value yet, they will likely continue to mature over time.

Business Functions Anticipated to Deliver Most Value from AI Agents



* Because respondents were allowed to choose up to three, total will not add up to 100%

➤ **Brazil** is seeing astronomical current value (page 25) from AI agents, especially in IT (63.1%), Customer Support (42.7%), and Marketing (42.5%). This current reality is significantly outpacing the already high expectations they have.

But while the **UK's** overall numbers are slightly lower compared with Brazil and the U.S., their current business value is exceeding expectations in all but two functions (Sales and Marketing). On the other hand, in the **U.S.**, less than half of functions are seeing current value that outstrips expectations — IT, Customer Support and Finance, just like Google predicted. Despite the country's notorious optimism ("Ted Lasso" struck a chord for a reason) this expectation gap will likely be closed as agentic deployments here mature.

Business Functions Anticipated to Deliver Most Value from AI Agents **By Country**

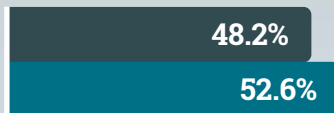
	UK	USA	Brazil
IT (e.g. coding)	41.40%	48.00%	55.29%
Marketing (e.g. content generation)	28.80%	30.80%	39.72%
Customer Support (e.g. chatbots)	27.60%	25.40%	36.33%
Finance (e.g. accounts)	26.40%	25.60%	35.73%
Sales (e.g. pipeline research)	24.40%	29.20%	32.53%
HR (e.g. payroll/recruitment)	24.80%	29.00%	21.96%
Supply chain / Logistics	18.80%	25.80%	27.15%

➤ The Enterprise AI Reality Check: Anticipated vs. Current Business Value

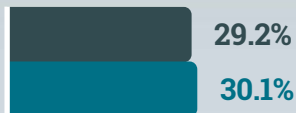
The Enterprise AI Reality Check: Anticipated vs. Current Business Value

■ Anticipated Value ■ Current Value

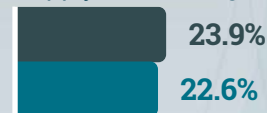
IT



Finance



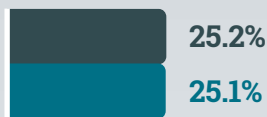
Supply Chain / Logistics



Customer Support



HR



Marketing



Sales



When we look at the current business value and the anticipated future value datasets side-by-side, it reveals exactly **where the technology is over-delivering** today, and **where it is struggling** to live up to the hype.

➤ Where Should I Focus?

If you're looking for where to invest now for the best return:



Short-Term ROI SPEED

Customer Support Agents
Quickest to deploy, easiest to measure



Mid-Term ROI REVENUE

Sales Development Agents (SDRs)
High impact on the top line



Long-Term ROI TRANSFORMATION

Supply Chain & Operations Agents
Highest potential savings, but hardest to integrate

Time to Market Spotlights Need for Speed

Which, if any, of the following business outcomes are the primary drivers for your AI automation strategy over the next 12 months?

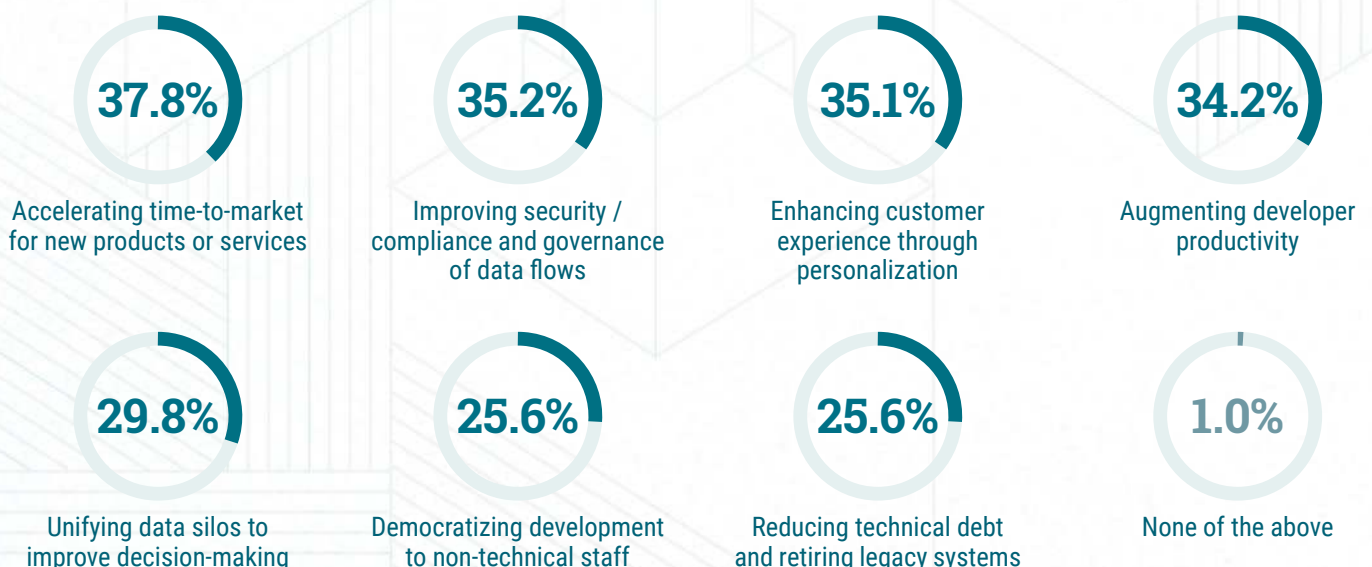
In 2026, AI is driven by strategy and buoyed by results. This increased focus on the bottom line is evident when we drill down a bit further into what strategy means to our respondents.

Based on our data, many businesses (38%) are **prioritizing time-to-market acceleration** as the primary justification for AI investment. The ability to rapidly iterate and launch new products has become increasingly critical as businesses look to outpace competitors, many armed with their own automated development cycles.

Echoing the increased focus on security we see pop up again and again across our data, “Improving security” follows quickly behind (35.2%). Paired with earlier data identifying security as the number-one bottleneck to production, this suggests that organizations are no longer just “worried” about security — they are actively using AI automation to solve it, likely through automated auditing and real-time data flow monitoring.

Interestingly, only 1% of respondents selected “None of the above.” This demonstrates that **AI has completed the transition away from “nice to have” experimental budget line**, as 99% of orgs have at least one specific, high-stakes business outcome they’re chasing with their AI strategy.

Primary Drivers for AI Automation Strategy Over the Next 12 Months



* Because respondents were allowed to choose up to three, total will not add up to 100%

➤ Once again, **Brazil** is leaning into AI with extraordinary intensity. Nearly half of Brazilian respondents (49.3%) identify augmenting developer productivity as a **primary driver** — almost double the UK's rate (24.8%). These respondents are also leading the charge in using AI to accelerate time-to-market (46.9%).

While the **U.S.** is also concerned with speed, it's particularly concerned with unifying data silos (32.6%) to improve decision-making. These respondents' strategy appears more focused on the internal architectural work required to enhance customer personalization (35.6%), their top-rated driver.

The **UK** is the only region where democratizing development to non-technical staff via low-code/no-code "citizen development" (26.8%) ranks higher than augmenting current developers. This echoes data elsewhere in the report showing the UK's **struggles to bridge the talent gap**.

Primary Drivers for AI Automation Strategy **By Country**

	UK	USA	Brazil
Accelerating time-to-market for new products or services	34.40%	32.00%	46.91%
Improving security / compliance and governance of data flows	31.00%	34.00%	40.72%
Enhancing customer experience through personalization	29.40%	35.60%	40.32%
Augmenting developer productivity	24.80%	28.40%	49.30%
Unifying data silos to improve decision-making	25.60%	32.60%	31.14%
Democratizing development to non-technical staff	26.80%	26.40%	23.75%
Reducing technical debt and retiring legacy systems	25.80%	23.20%	27.74%

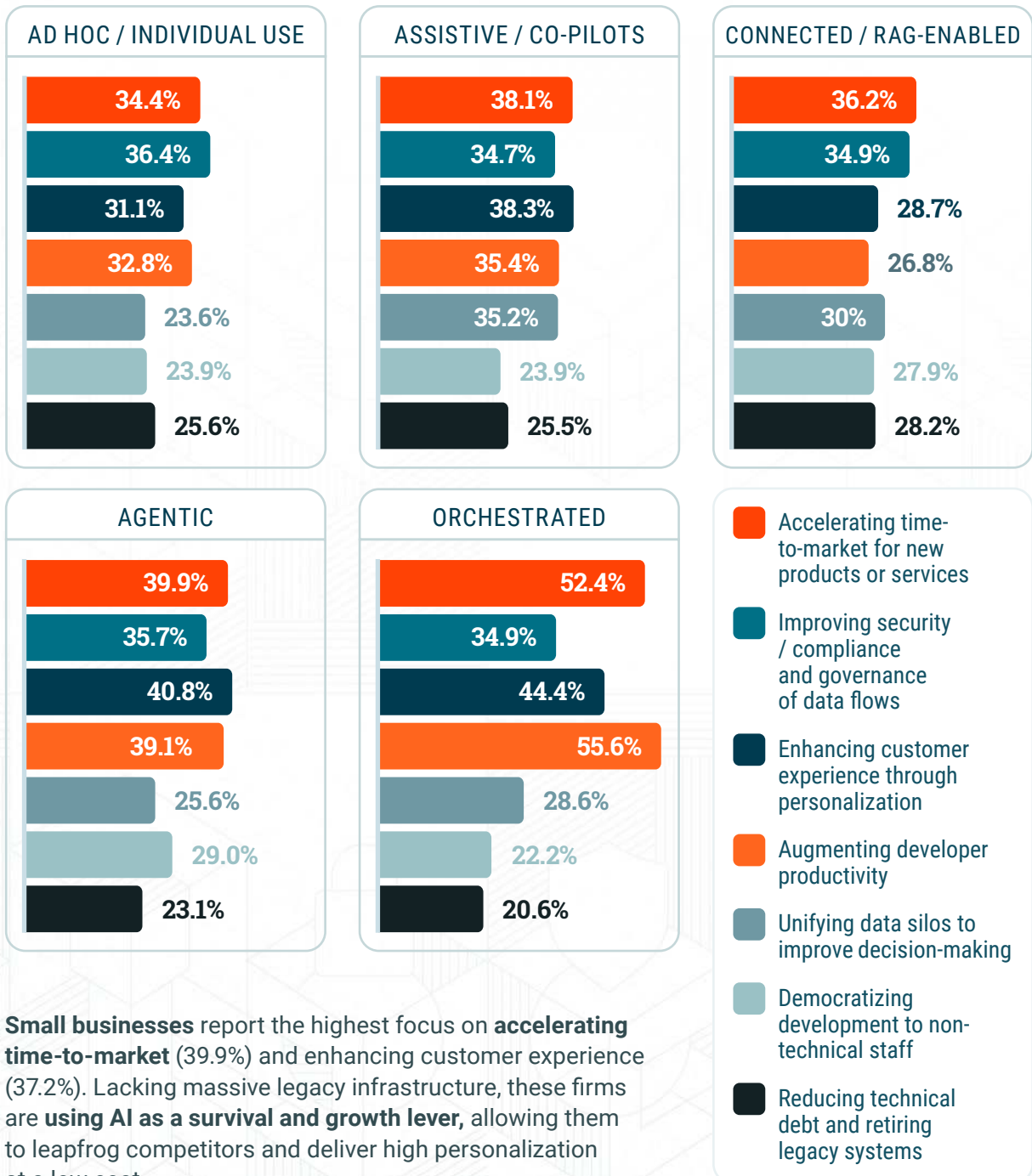
Analyzing these drivers through the lens of maturity reveals how an organization's focus shifts as their AI capabilities evolve:

Organizations in the **Orchestrated** stage are overwhelmingly focused on augmenting developer productivity (55.6%) and accelerating time-to-market (52.4%). At this stage of maturity, **AI isn't just a tool** — it's a force multiplier for the entire engineering and product organization.

At the **Assistive** (35.3%) stage, unifying data silos peaks as a priority, as companies deploying co-pilots realize these tools are only as good as the data they can access, pushing silo unification to the fore as a **critical mid-maturity huddle**.

While the **Ad hoc** (23.9%) and **Connected** (27.9%) stages show a healthy interest in democratizing development to non-technical staff, this drops to its lowest point (22.2%) at the most advanced **Orchestrated** stage. Rather than viewing everyone as a developer, **the focus here seems to be on making highly advanced teams of developers more productive.**

Primary Drivers for AI Automation Strategy By AI Adoption Stage



Small businesses report the highest focus on **accelerating time-to-market** (39.9%) and enhancing customer experience (37.2%). Lacking massive legacy infrastructure, these firms are **using AI as a survival and growth lever**, allowing them to leapfrog competitors and deliver high personalization at a low cost.

For the **largest enterprises**, AI strategy is heavily anchored in security, compliance and governance (40%). At this scale, the risk of unmanaged data flows is too high, driving a **need for AI that can “self-govern” and automate the complex compliance requirements of global markets** like the EU.

Funding Rises Alongside Returns

How do you expect your organization's funding for automation/integration and for AI initiatives to change over the next 12 months?

According to a **recent report by Gartner®**, overall global IT spending is expected to reach a record high of \$6.15 trillion this year, a nearly 11% year-over-year increase. But AI spending is rising four times as fast, increasing 44% year-over-year to **\$2.52 trillion** — or more than a third of overall global IT spend.

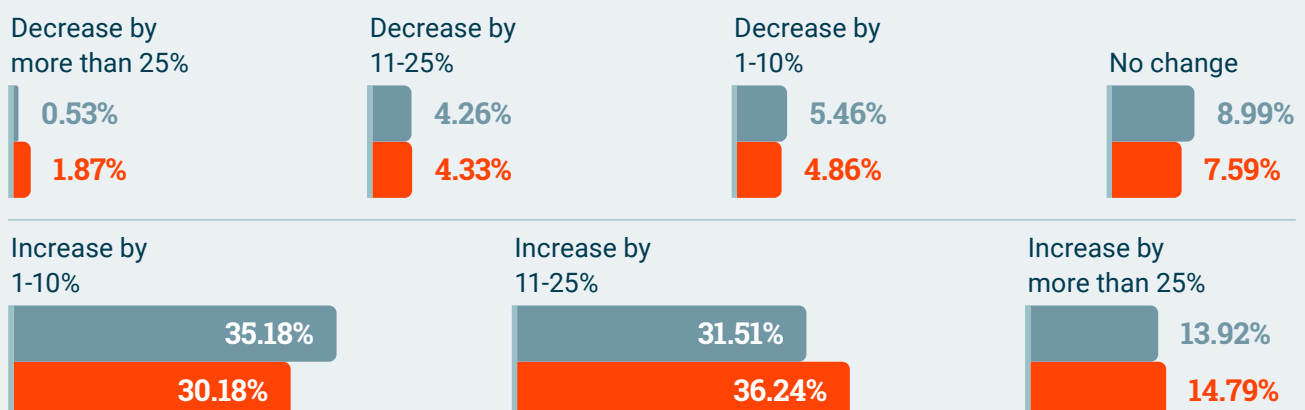
While these trends seem remarkable, they're reflected in our survey data as well. **In last year's AI Benchmark Survey, we reported that a majority of IT leaders had allocated more than 30% of their budgets to data integration, process automation/orchestration and AI — with 34% saying they'd dedicated over half their budget to these initiatives.**

For this year's survey, we split AI and Automation/Integration into two separate categories — and despite already robust spending for both, **our 2026 data shows budgets for each of these will continue to grow this year.**

The most common budget adjustment cited for AI spending was an 11-25% increase, with more than a third of respondents (36.2%) anticipating this outcome. Automation spending, on the other hand, will grow more incrementally this year, with 35.2% of respondents saying they expect a budget increase of 1-10%.

The most striking takeaway here is the sheer volume of organizations increasing their technology spending. **Over 80% of all respondents plan to increase their budgets for both Automation/Integration and AI initiatives in the coming year.** While the average budget increase for both categories globally was about 10%, AI captured a higher rate of 25%+ budget bumps, as AI shifts from the R&D budget into core enterprise infrastructure.

Expected Funding Changes Over the Next 12 Months



- While less than 4% of organizations in any country expected to drop their AI budgets by more than a quarter, the data for budget *increases* was less consistent.

In the **UK**, respondents expected budgets to **rise more conservatively**, with nearly half of respondents expecting an increase of 1-10% for automation. AI initiatives, on the other hand, were slightly more likely to see a 11-25% increase, as UK organizations increasingly buy into an AI agent-powered future.

In contrast, based on our data **Brazil is already rushing toward this future at full speed**: The country leads the pack in massive, 25%+ increases across both categories. This aligns with similar trends that appear elsewhere in this report, once again demonstrating Brazil's AI bullishness as the country aggressively moves toward establishing itself as a dominant tech hub.

Expected Funding Changes **By Country**

	UK		USA		Brazil	
	Automation /Integration	AI Initiatives	Automation /Integration	AI Initiatives	Automation /Integration	AI Initiatives
Decrease by more than 25%	0.80%	3.40%	0.00%	1.00%	0.80%	1.20%
Decrease by 11-25%	4.20%	2.80%	3.40%	5.80%	5.19%	4.39%
Decrease by 1-10%	2.40%	2.20%	8.20%	7.40%	5.79%	4.99%
No change	9.00%	8.20%	11.20%	8.80%	6.79%	5.79%
Increase by 1-10%	42.80%	36.60%	35.40%	31.00%	27.35%	22.95%
Increase by 11-25%	28.80%	33.60%	32.00%	35.00%	33.73%	40.12%
Increase by more than 25%	12.00%	13.20%	9.80%	11.00%	19.96%	20.16%

Companies that have already achieved an **Orchestrated** ecosystem didn't get that way by *not* spending money — so it's no surprise that these organizations are vastly outspending their peers across both AI and Automation/Integration. Nearly a third of these companies plan an **additional 25%+ increase in AI budgets**, with just over one in five planning the same sorts of increases for Automation/Integration.

➤ But even **Ad Hoc** adopters are increasing both budgets, albeit more slowly. The largest percentage of respondents (40.98%) said their **Automation budget would increase** by 1-10% — while for AI, the majority was evenly split between a 1-10% increase and a 11-25% increase (36.1% each.) Given that these companies are funding the exploration phase, as opposed to a full rollout, **these numbers still demonstrate a bullish budgetary outlook.**

Expected Funding Changes By AI Adoption Stage

	AD HOC		ASSISTIVE		CONNECTED		AGENTIC		ORCHESTRATED	
	Automation /Integration	AI Initiatives	Automation /Integration	AI Initiatives	Automation /Integration	AI Initiatives	Automation /Integration	AI Initiatives	Automation /Integration	AI Initiatives
Decrease by more than 25%	0.33%	0.66%	0.57%	3.26%	0.54%	1.61%	0.42%	1.26%	1.59%	0.00%
Decrease by 11-25%	2.62%	3.93%	5.56%	5.75%	5.63%	4.83%	1.68%	1.68%	3.17%	1.59%
Decrease by 1-10%	5.25%	4.26%	6.70%	4.21%	5.90%	7.77%	1.68%	3.36%	7.94%	1.59%
No change	6.89%	4.59%	7.66%	6.90%	13.14%	10.99%	9.24%	6.72%	4.76%	11.11%
Increase by 1-10%	40.98%	36.07%	33.14%	27.97%	31.64%	30.56%	38.66%	27.31%	31.75%	28.57%
Increase by 11-25%	33.44%	36.07%	31.61%	38.51%	28.42%	29.49%	34.45%	44.96%	28.57%	25.40%
Increase by more than 25%	10.49%	14.43%	14.56%	13.03%	14.75%	14.75%	13.45%	14.71%	22.22%	31.75%

This shift from **exploratory AI spending to operational deployment** can be seen even more clearly in the Revenue data. More than a third of large enterprises plan to increase AI budgets by 25%+ in the next year — dwarfing the rest of the market, and aligning with the **broader 2026 economic trend** of large corporations doubling down on agentic AI and productivity-driven infrastructure to offset rising labor costs.

➤ In contrast, **small businesses** are showing the highest level of volatility. While many are increasing budgets, this group also represents by far the highest percentage of companies *decreasing* their AI budgets, with more than 14% **planning to cut funding in 2026**. In companies of this size, money is precious — so it's little surprise that the cost of operating AI tools is forcing them to consolidate SaaS spending or abandon subscriptions that aren't delivering immediate ROI.

But while AI is seeing more of the massive >25% budget spikes, traditional automation and system integration budgets remain steady, sitting heavily in the 1-10% and 11-25% growth bands across the board. In other words, **while AI captures the headlines, automation remains the steady, critical investment required to both accelerate the business and maximize the growing AI spend.**

Expected Funding Changes By Revenue

	SMALL BUSINESSES		LARGE ENTERPRISES	
	Automation /Integration	AI Initiatives	Automation /Integration	AI Initiatives
Decrease by more than 25%	0.7%	1.7%	0.00%	0.00%
Decrease by 11-25%	5.6%	5.9%	1.11%	0.00%
Decrease by 1-10%	6.5%	6.7%	3.33%	2.22%
No change	11.8%	8.6%	3.33%	4.44%
Increase by 1-10%	34.1%	33.0%	34.44%	17.78%
Increase by 11-25%	30.7%	33.9%	31.11%	40.00%
Increase by more than 25%	10.3%	10.1%	26.67%	35.56%

* For more on how we define business size, see Methodology section.

➤ Why Integration Will Remain Relevant in an AI-Driven World

As AI agents proliferate, the **biggest barrier** to enterprise adoption will no longer be model quality – **it will be connectivity**. AI systems create value only when they can read, write, update and trigger actions across business applications. In other words, **AI without integration produces insights; AI with integration produces outcomes**.

As a result, **integration** will become the **foundational layer of the AI era**, much like cloud infrastructure was in the 2010s.

Enterprises will demand platforms that provide:



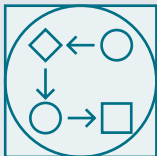
Secure access to systems through APIs, events and data pipelines



Consistent authentication and authorization across agents



Full governance and observability for AI-driven actions



The ability to orchestrate multi-step processes end-to-end

In the AI-driven enterprise, so-called middleware is no longer just plumbing – **it has become the core of the operating model.**

METHODOLOGY

For the 2026 Jitterbit AI Automation Benchmark Survey, we created a list of 12 multiple-choice questions on a wide variety of AI automation and AI agent-related topics. The resulting cross-sectional survey was sent to 1,501 IT decision-makers across the U.S., the UK and Brazil. To ensure the objectivity of responses, Jitterbit partnered with Censuswide, which ensures anonymity as a default, and made each question optional.

ORGANIZATION SIZE BY HEADCOUNT

10 OR LESS	10-49	50-99	100-249	250-500	500+
59	71	231	554	346	240

INDUSTRY

SOFTWARE/TECH	345	RETAIL	190
MANUFACTURING	212	SALES, MEDIA & MARKETING	137
BANKING/FINANCE	196	TRAVEL & TRANSPORT	113

REVENUE

SMALL BUSINESSES	815
<£10 Million - £49.99M	Under \$13,514,279 - \$67,571,401
LOWER MID-MARKET	377
£50M - £99.99M	\$67,571,402 - \$135,170,570
UPPER MID-MARKET	219
£100M - £499.99M	\$135,170,571 - \$675,852,857
LARGE ENTERPRISES	90
£500M or over	\$675,852,858 or over

COUNTRY

USA	UK	BRAZIL
500	500	501

AI MATURITY

AD-HOC INDIVIDUAL USE	305
Employees using standalone tools like ChatGPT	
ASSISTIVE CO-PILOTS	522
AI used in apps to help employees find data or suggest action, but humans still execute	
CONNECTED RAG-ENABLED	373
AI retrieves live data from internal systems, but cannot perform actions	
AGENTIC ACTION-ORIENTED	238
Agents integrated with APIs to perform tasks autonomously	
ORCHESTRATED ECOSYSTEM	63
Multiple agents collaborate across departments for end-to-end business process orchestration	

> WHY JITTERBIT?

20+ years of
automation
innovation

2K+ customers

60+ countries

600+ technology
& channel
partnerships

99.99%
product uptime

11.5M+
lines of low-code

120B
API calls per month

Harmony Platform

AI-Infused Low-Code Integration, Orchestration, Automation & App Development

AI-Infused



iPaaS
Build, manage and
maintain integrations



API Manager
Create, control
and consume
your APIs



App Builder
Build, manage and
maintain web and
mobile applications



EDI
Build, manage and
monitor exchange of
business documents



Marketplace
Get certified pre-built
integrations



Management Console
Manage, monitor and
administer projects
in one place

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