5 trends for 2026

Capture fleeting opportunities with confidence

IBM

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Key takeaways

Uncertainty will be your greatest asset—if you embrace it.

74% of executives say economic and geopolitical volatility will create new business opportunities for their organization in 2026.

Employees will want more AI—not less.

At least twice as many workers across age groups say they would embrace—rather than resist—greater use of AI by their employers in 2026.

Customers will hold your AI accountable.

Easy-to-understand explanations of how AI is using their data is what makes consumers most comfortable engaging with it.

Global AI resilience will require a local safety net.

93% of executives say they must factor AI sovereignty into their 2026 business strategy.

Quantum advantage will demand strength in numbers.

Quantum-ready organizations are three times more likely to belong to multiple ecosystems than the least ready organizations.

Introduction

An appetite for ambiguity

Progress is a double-edged sword. It solves yesterday's problems and creates new ones organizations don't yet understand.

Each breakthrough comes with unknown implications. The faster transformation happens, the more unknowns multiply. With organizations moving at the speed of AI—and soon, the speed of quantum—seeking out stable ground becomes an exercise in futility.

Instead, forward-thinking leaders are looking for the fissures. Cracks in existing markets are where new openings will emerge. The secret to capturing these opportunities isn't perfect planning. It's developing an appetite for ambiguity.

It's charting a path forward while the map is still being drawn.

How can leaders build strategies that will bend—not break—as the business landscape shifts? How can they sustain progress, profitability, and growth?

To find out, the IBM Institute for Business Value (IBM IBV) partnered with Phronesis to ask more than 1,000 C-suite executives how economic and geopolitical factors would influence their decision-making in 2026, how they plan to approach AI, and which strategies they expect to drive success. We also talked to 8,500 global consumers and employees, in partnership with Suzy, about their economic outlook, how they interact with AI—personally and in the workplace—and how they feel about the changes that have come along with AI (see "Research methodology" on page 23).

With organizations moving at the speed of AI—and soon, the speed of quantum—seeking out stable ground becomes an exercise in futility.

The perspectives in these two surveys don't always align. What they do share is a sense of enthusiasm about the AI moment. Both groups see opportunity in uncertainty.

Executives express a sense of resilience: While only one-third are optimistic about the outlook of the global economy, 84% have a positive outlook on their organization's future performance (see Figure 1). In the face of disruption, 95% of executives say they must increasingly make fast decisions. Still, 96% say the highest-stakes decisions they made in 2025 turned out to be the right ones.

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Figure 1

Despite uncertainty, executives are optimistic about 2026.

Percentages reflect executives who have optimistic, neutral, and pessimistic outlooks for 2026.

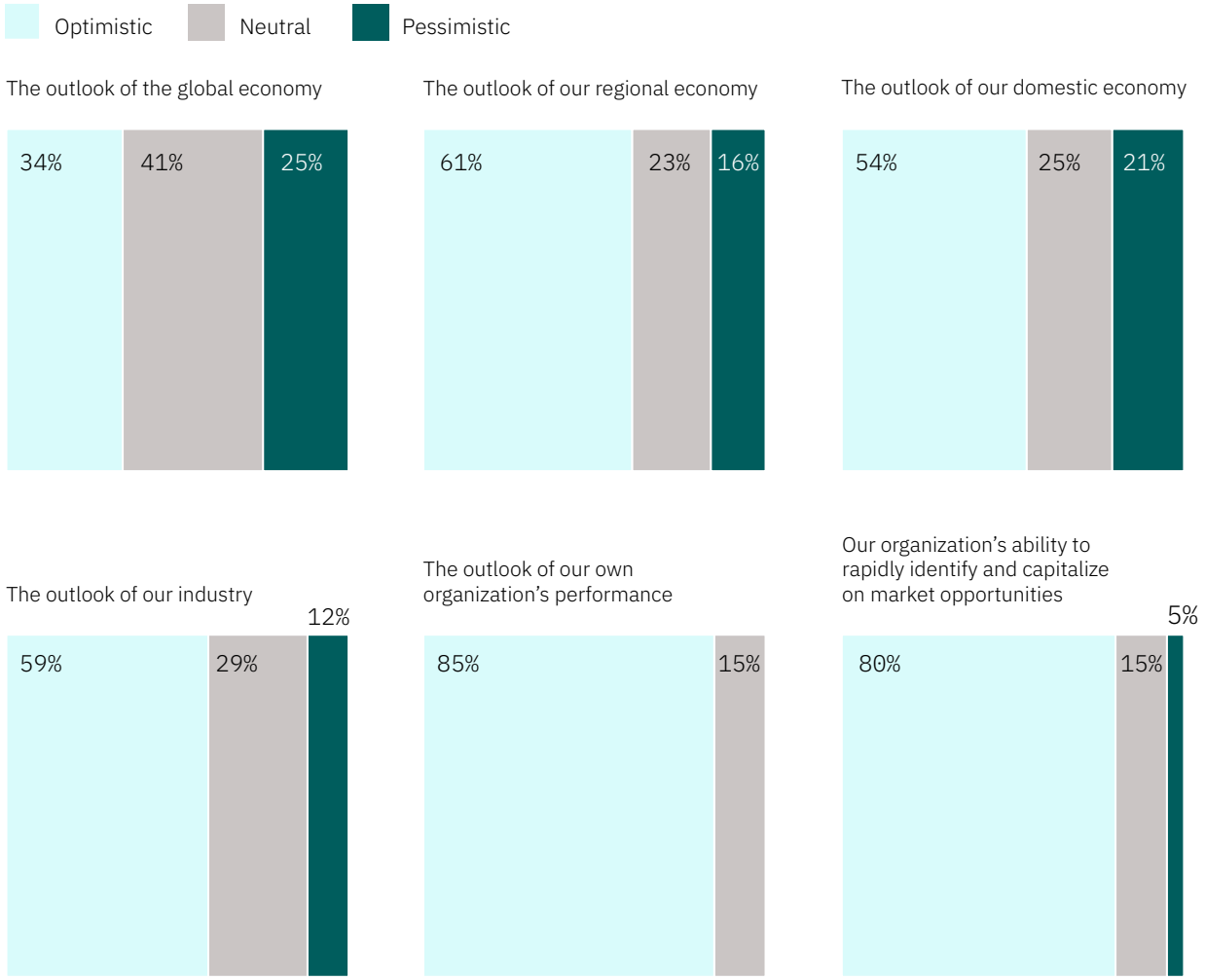
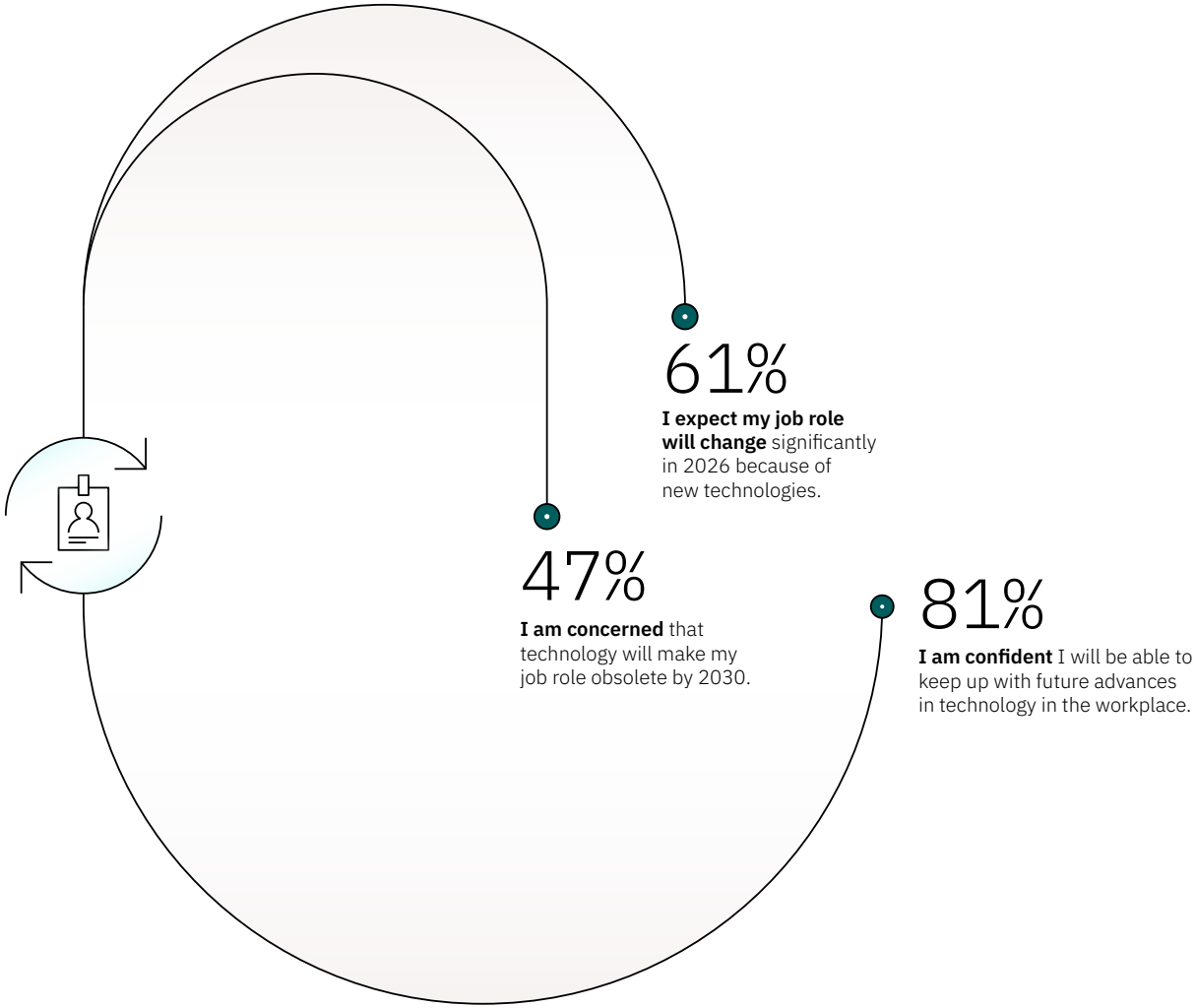


Figure 2

Employees are ready to lead with AI.

Percentages reflect employee agreement with statements about workplace technology.



Employees are also hopeful. When considering their individual skills and capabilities, 81% of employees are confident they'll be able to keep up with future advances in workplace technology. This is despite the fact that 61% of employees expect technology will change their job role significantly in 2026 and almost half are concerned it will make their role obsolete by 2030 (see Figure 2).

Executives and employees share a sense of enthusiasm about the AI moment.

In this moment of possibility, what opportunities might be waiting? Based on our research, we've identified five trends we think every business leader should watch in 2026:

Trend
1
Uncertainty will be your greatest asset—if you embrace it.

Trend
2
Employees will want more AI—not less.

Trend
3
Customers will hold your AI accountable.

Trend
4
Global AI resilience will require a local safety net.

Trend
5
Quantum advantage will demand strength in numbers.

Trend 1

Uncertainty will be your greatest asset—if you embrace it.

In a volatile environment, rapid response is non-negotiable. In fact, 90% of executives say they'll lose their edge if their organization can't operate in real time.

It's no longer enough to respond to change. To gain an edge, organizations must anticipate change and profit from it—or risk being thrown off track. And that risk is real: 81% of executives say geopolitical and economic issues threatened their technology investments in 2025. Nearly half believe the problem will get worse in 2026.

The bright side: 74% of executives say economic and geopolitical volatility will create new business opportunities for their organization in 2026 (see Figure 3). The key is spotting these market openings as they appear—and capitalizing on them before they vanish.

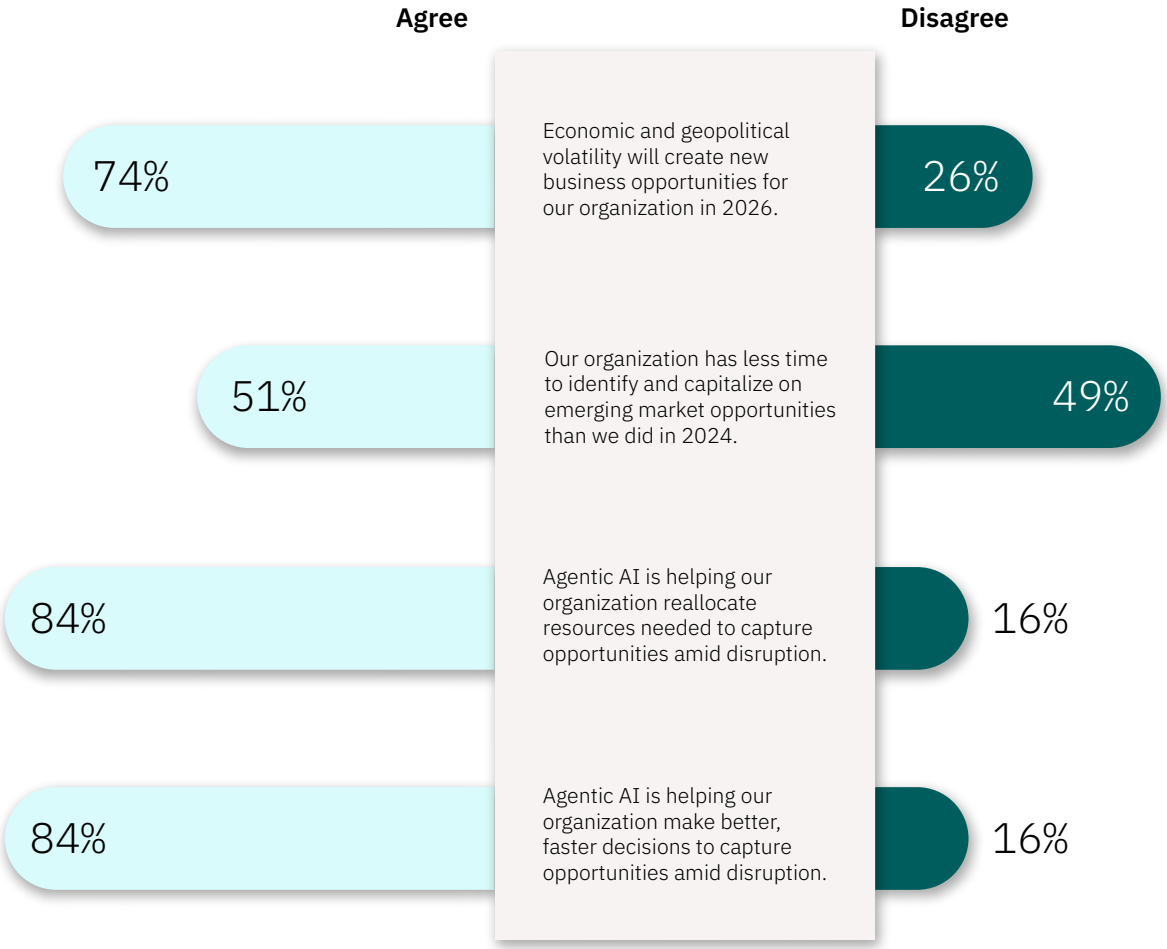
But moving at market speed is not a simple proposition for a massive enterprise. Responding to emerging risks and opportunities requires flexible IT infrastructure and data architecture that allows information to flow to the right people—and the right AI agents—at the right time.

Already, more than four in five executives say agentic AI is helping their organization make better, faster decisions and reallocate resources needed to capture opportunities amid disruption. And 69% of execs say they need to develop agentic AI simulation and modelling capabilities due to global economic uncertainty.[1]

Figure 3

Agentic AI helps organizations capture opportunities amidst disruption.

Percentages reflect executive agreement with statements about geopolitical and macroeconomic trends.



However, the leaders that view this shift as a mandate, not a nice-to-have, are a step ahead of their peers. Executives who say agentic AI fuels better, faster decision-making are more than twice as likely to see opportunity in volatility.

What might that look like in practice? For a manufacturer facing supply-chain disruption, AI agents can identify alternative material sources, reroute logistics, and adjust pricing models—while other organizations are still scheduling emergency meetings. For a retailer, AI agents can detect shifts in consumer sentiment related to specific brands on social media, triggering marketing adjustments and product pivots.

This future is already here. One in four executives say their organization had AI agents taking independent action in 2025. Seven in ten expect to have that capability in place by the end of 2026.[2] And Chief Data Officers (CDOs) are confident in what these agents can do. 83% of these leaders, who are often responsible for delivering results with AI, say the potential benefits of deploying AI agents in their organizations outweigh the risks—and 77% say they're comfortable with their organization relying on the outcomes they produce.[3]

Of course, just having AI agents doesn't guarantee success. In fact, executives say only about 40% of their agentic AI initiatives were successful in 2025, as defined by objective metrics.[4] But to make the right moves as conditions shift, organizations will need to elevate their enterprise AI. When AI agents can monitor multiple market signals simultaneously, analyze complex interdependencies, and model scenarios in real time, uncertainty transforms from a liability into an asset.

What to do

Rewire the organization for rapid response.

Revamp organizational structures—including team make-up, data architecture, and product portfolios. Redesign them for agility, incorporating data products for AI agents to improve and optimize decision-making at every level. Once you're confident in their performance, give AI agents authority to adjust pricing, pivot messaging, and launch product variations when specific opportunity thresholds are met.

Trend 2

Employees will want more AI—not less.

There's a perception gap at the heart of AI transformation.

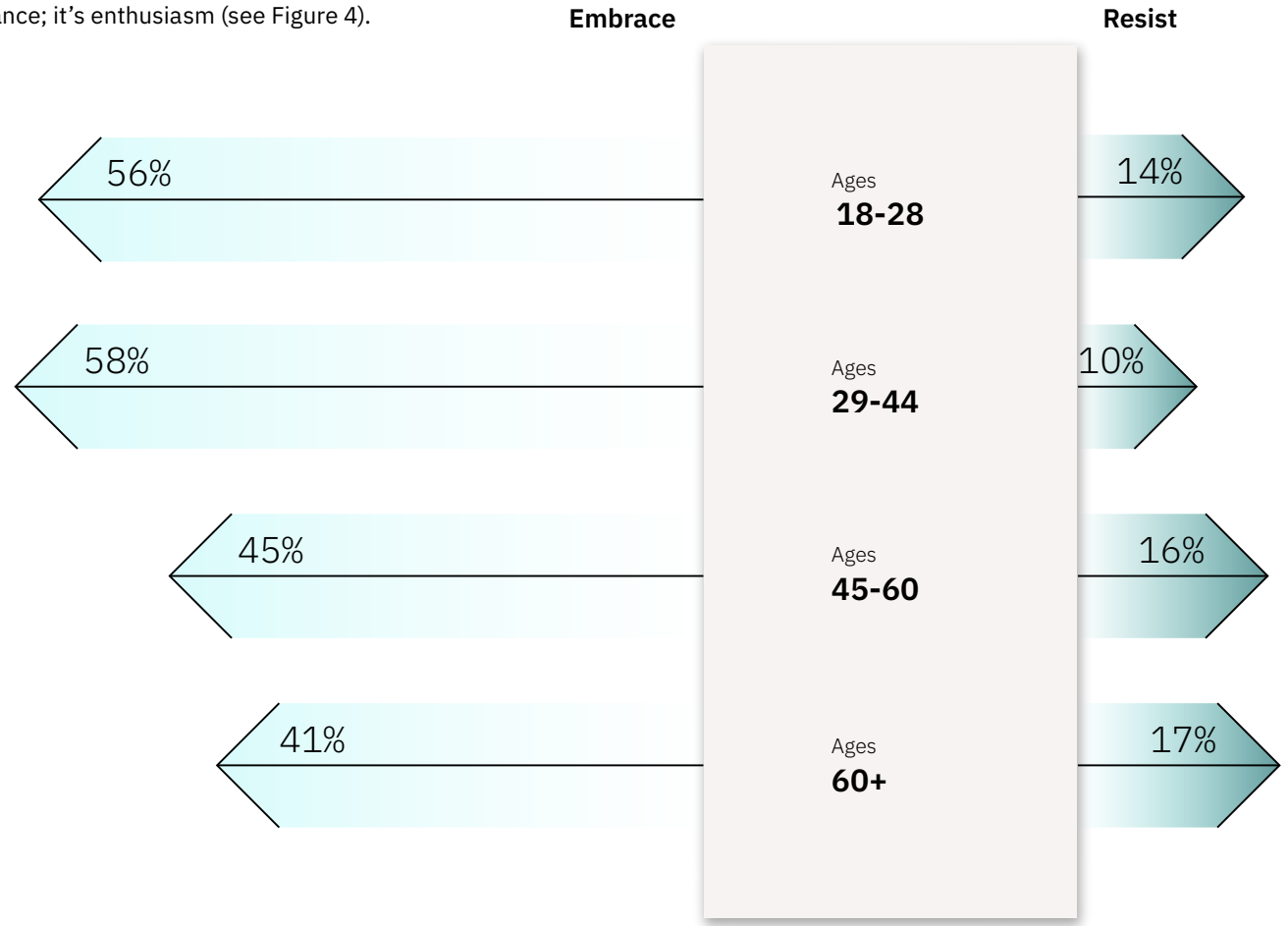
Executives are worried about transformation fatigue: 56% say employees are getting burned out due to continually changing processes and responsibilities. But employees are less concerned about the pace of transformation—77% say the rate at which technology is changing their daily work is sustainable.

When it comes to AI, employee sentiment is more positive than negative. Across all generational groups—from AI natives to seasoned veterans—at least twice as many employees would embrace, rather than resist, greater use of AI by their employers in 2026. This isn't just tolerance; it's enthusiasm (see Figure 4).

Figure 4

Employees of all ages are enthusiastic about AI.

Percentages reflect how employees across age groups would react to greater AI use by their employer in 2026.



Note: Percentages in each age group don't add up to 100% because "neither resist nor embrace" was also an option.

48% of employees say they would be comfortable being managed by an AI agent.

Employees say AI has already improved many aspects of their work, including problem-solving, productivity, and creativity. Of the two-thirds of employees who say AI is changing their corporate culture, 88% say the change is for the better.

For many employees, AI isn't the enemy—it's an escape hatch. 61% say AI makes their job less mundane and more strategic. It releases them monotony and gives them more time to do high-value work. While not everyone is on board, 63% of employees would work in collaboration with an AI agent—and nearly half (48%) say they'd be comfortable being managed by one. Knowing how to use new technologies is so important that 56% say they'd be willing to switch employers—and 42% say they'd be willing to take a pay cut—to get better training.

This is where executive and employee perspectives converge: executives say 56% of the workforce will require reskilling due to AI-driven automation by the end of 2026.[6] But the skills they'll need most aren't necessarily technical. In 2025, executives said problem-solving and innovation were the most important skills for their employees to have—and these are the same skills they predict generative AI will make more important over the next three years.[7]

As AI transitions from a tool that helps employees work faster to one that enables transformation and growth, the most valuable employees will do what AI cannot—exercise judgment, build relationships, navigate ambiguity, advance innovation. In fact, 82% of executives say they need to put their best people where AI is not used to drive competitive advantage.

What to do

Create a roadmap for roles that don't yet exist.

Ask every employee to identify which of their daily tasks could be augmented or automated by AI—and which can't. The tasks AI can't meaningfully enhance? Those become your competitive battlegrounds. Focus human talent there. Define roles as they emerge—but stay flexible. Create role frameworks, not rigid job descriptions. Continuously build organizational AI literacy from the boardroom to the ground floor.

Trend 3

Customers will hold your AI accountable.

Customer trust is the ultimate currency: 95% of executives say consumer trust in their AI will define the success of new products and services. Not influence—define.

For their part, 89% of consumers say they want to know when they're interacting with AI. In tomorrow's AI-driven marketplace, transparency will be table stakes.

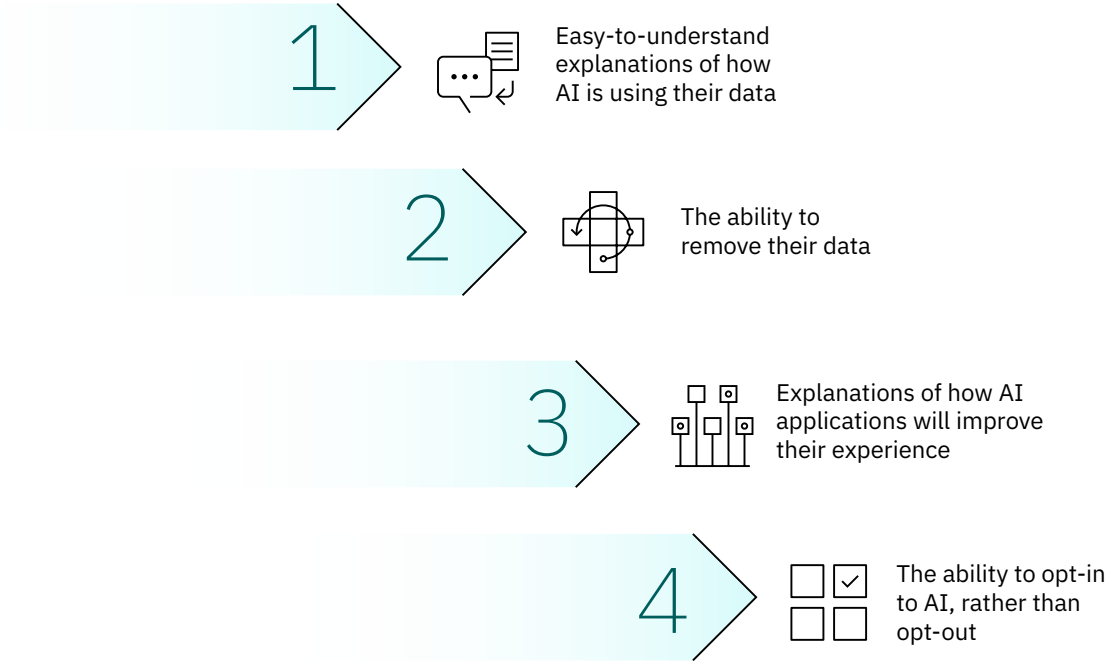
But consumers aren't demanding perfection. In fact, they're remarkably forgiving of AI's imperfections in consumer products and services. More than half (56%) say they're so excited about cutting-edge, AI-enabled services that they'd accept flaws. They get that AI is still learning and evolving. A chatbot that stumbles? Customers move on. A recommendation that misses the mark? They'll give it another shot.

But surprise them with how you're using AI—or their data—and that forgiveness vanishes. Four in five consumers say they would trust a brand less if it intentionally concealed AI's involvement in their experience. Two-thirds would switch brands in that scenario—and half would pay more to do so. Consumers are sending a clear message: We don't need AI to be flawless, but we do need to be in the loop (see Figure 5).

Figure 5

What do consumers want from your AI?

Ranking reflects the top factors that make consumers most comfortable engaging with AI-powered products and services.



Consumers don't need AI to be flawless—but they do need to be in the loop.

Ironically, organizations that say customers have voiced concerns about the safety and security of AI initiatives are more likely to deliver greater customer value with AI. That's because they're listening, not blocking negative feedback out. Executives at the most successful organizations prioritize being transparent about how they use customer data. They also proactively identify customers that are most excited about using AI and engage them in early trials.

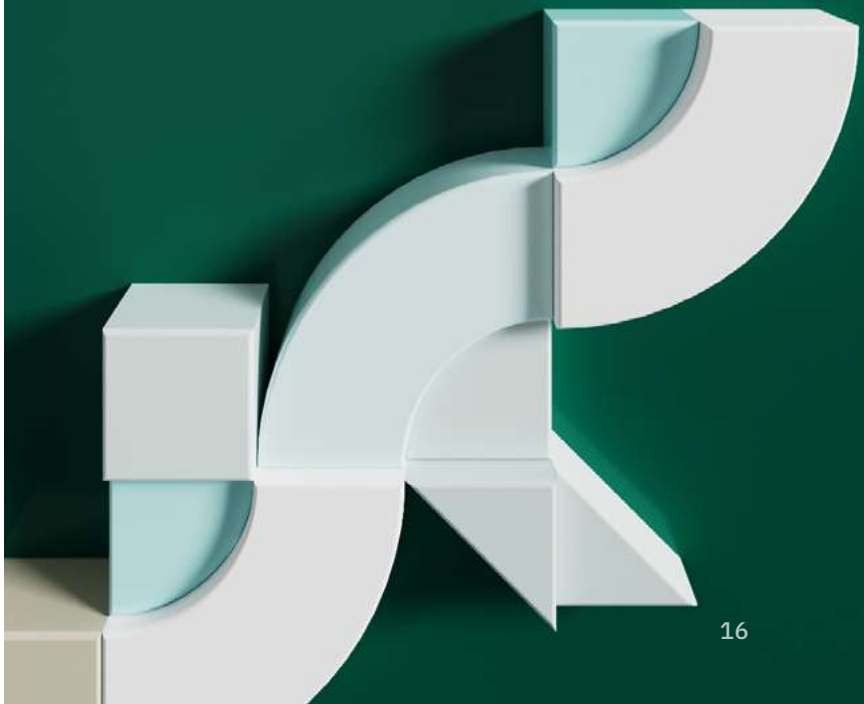
Engagement isn't just good for loyalty—it's the fuel for AI transformation. Your most connected customers share more data and become vocal champions for your AI-powered innovations, creating a virtuous cycle that competitors can't replicate.

Two-thirds of consumers would switch brands if a company intentionally concealed AI's involvement in their experience.

What to do

Make customers lab partners, not lab rats.

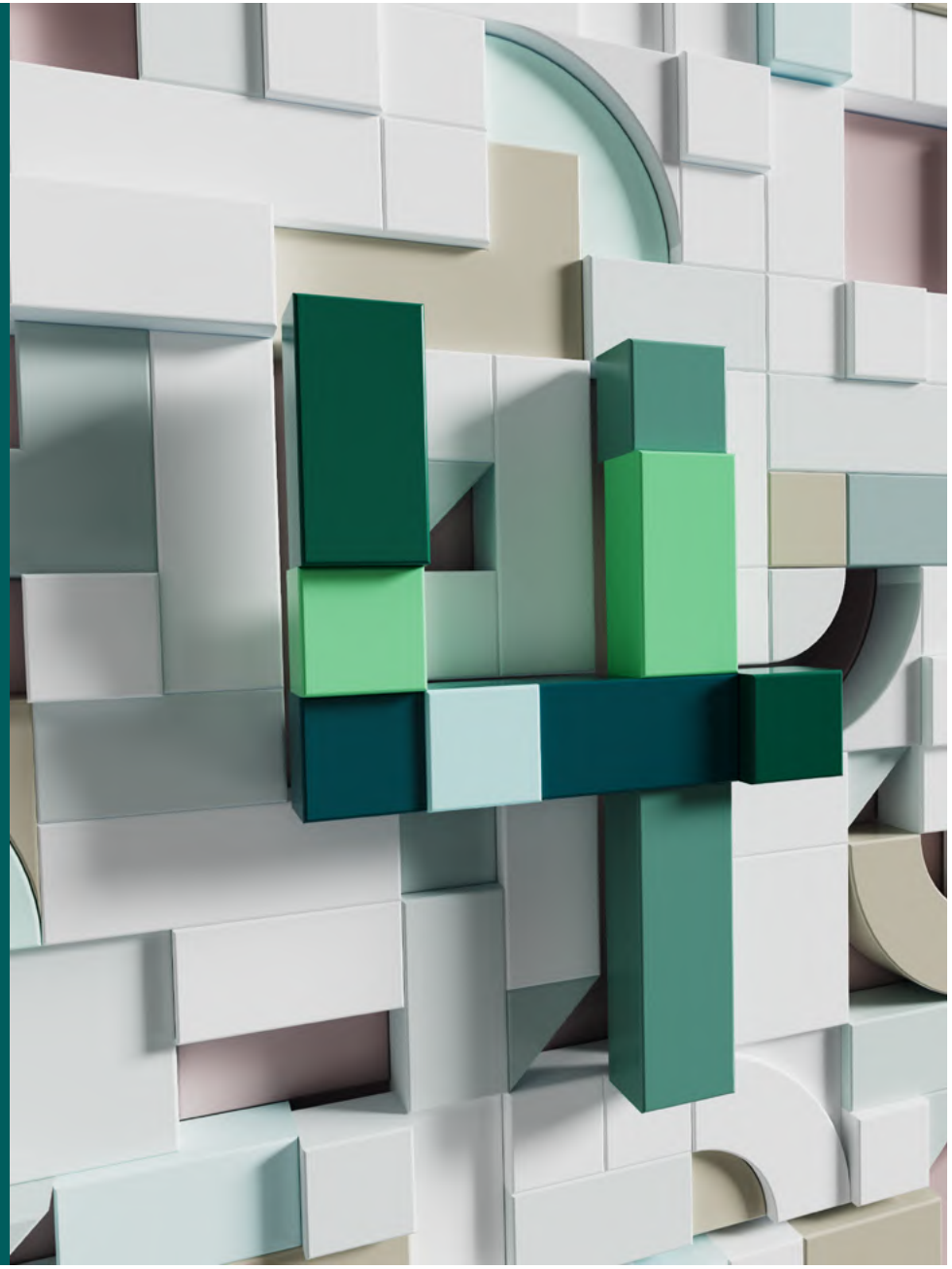
Don't just tell customers you're using their data—show them how. Incorporate transparency into AI-enabled product design from the start. Make AI-informed recommendations traceable so that customers can understand how decisions are being made. Help customers understand the value they get in return for sharing their data—and give them granular control with user-friendly deletion and portability options that go beyond regulatory minimums. Invite your biggest fans to test new AI features and help refine the experience before broader rollouts.



Trend 4

Global AI resilience will require a local safety net.

AI resilience hinges on uninterrupted access. That means AI sovereignty—an organization's ability to control and govern its AI systems, data, and infrastructure at all times—has become mission-critical.



With an eye on business continuity, 93% of executives say they must factor AI sovereignty into their 2026 business strategy (see Figure 6).

What does this look like? In some instances, it means building in-country AI capabilities from the ground up—from data centers to cloud architecture to AI models trained on local languages. In others, it means identifying vulnerabilities in the AI ecosystem and bringing at-risk capabilities closer to home.

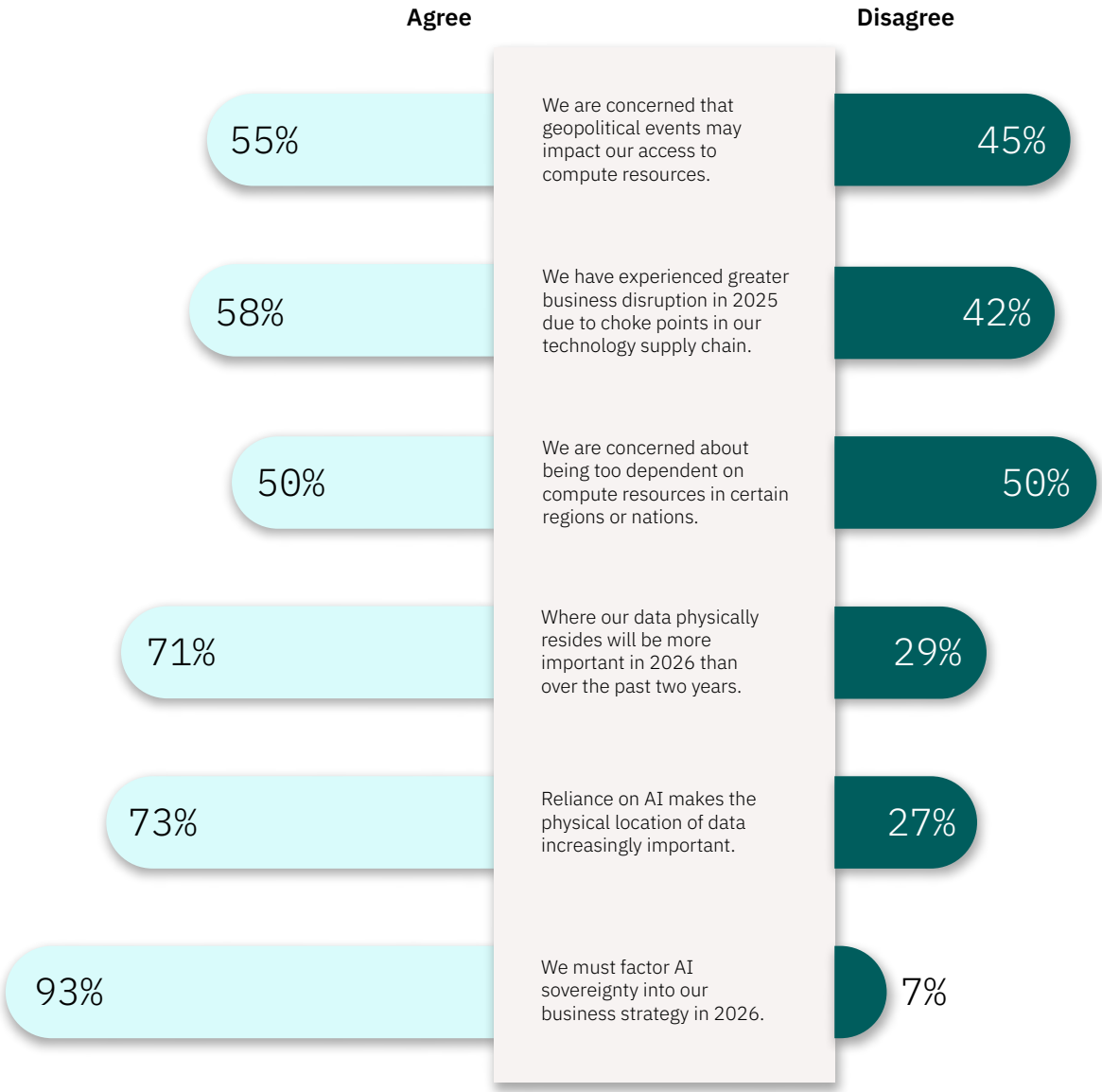
Without AI sovereignty, organizations may not be able to adapt fast enough when a crisis hits. When we asked executives whether they worry about over-dependence on compute resources in certain regions—without asking them to name names—50% agreed. Further analysis shows that leaders who share this concern are 26% less likely to see volatility as opportunity.

The risks to AI resilience run deeper than most realize. Consider what happens when new data regulations require customer data to remain in country—but a company's AI models were trained and deployed on infrastructure based elsewhere. Without local data, AI models, and talent in place, certain operations could come screeching to a halt. In addition, executives are concerned about data breaches, the inability to comply with evolving regulations, loss of access to data, and intellectual property theft.

Figure 6

Location is central to AI resilience.

Percentages reflect executive agreement with statements about their organization's data and AI resilience.



AI sovereignty is an organization's ability to control and govern its AI systems, data, and infrastructure at all times.

AI resilience is also dependent on continued access to the latest and greatest technology. For example, as trade restrictions continue to define how cutting-edge semiconductors can be bought and sold, many organizations find their AI capabilities hanging in the balance. In fact, 75% of executives at chip-buying organizations say dependence on a narrow pool of semiconductor vendors is a major strategic challenge.[5] In a winner-takes-most market, where early leaders could gain an insurmountable advantage, organizations can't afford even temporary snags in their AI supply chain.

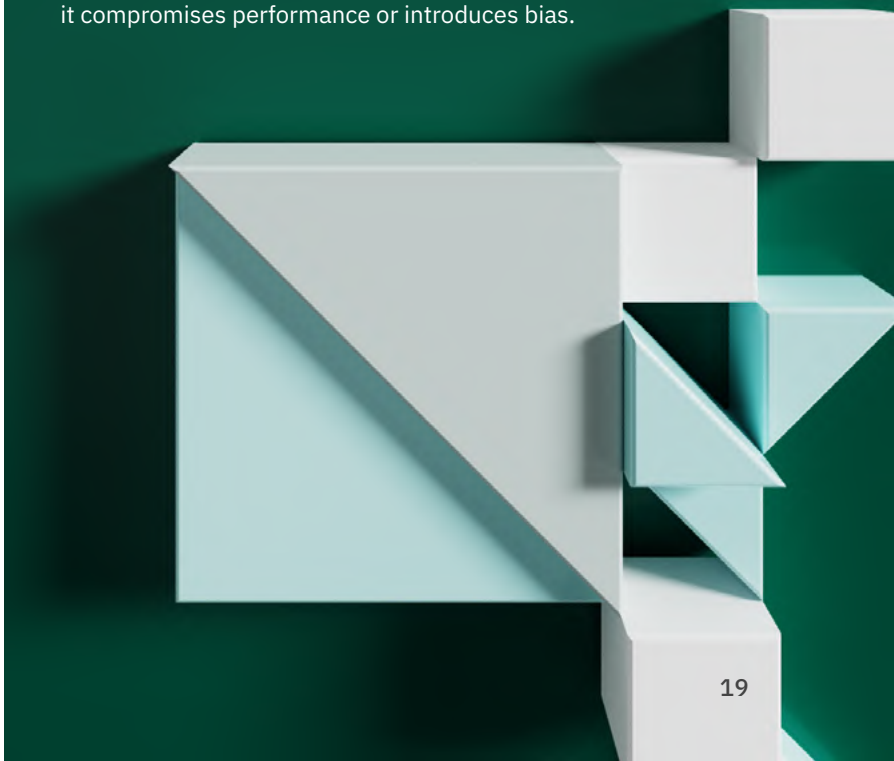
Transparency and trust remain essential for AI resilience, as well. As both regulators and consumers ask organizations to explain how AI agents come to specific decisions, organizations must design agents that can show their work, for even the most complex outputs. Then there's data and model drift to manage, where changes in real-world patterns make AI outcomes less reliable.

Achieving AI resilience requires thinking differently about how an organization secures its advantage. Rather than focusing on the technology you possess, assess the strategic decisions you can make independently: where your models run, how your data is governed, and who controls your business continuity when global systems falter. Shift your thinking from vertical integration to chaos-ready orchestration. That's the real path to resilience.

What to do

Solidify your AI safeguards.

Architect your AI environment so workloads, data, and agents can shift seamlessly among trusted locations and providers. Automate core compliance tasks to accelerate AI innovation with trust and transparency. Build explainability into every model from the start, requiring AI agents to document their decision pathways so stakeholders understand not just what happened, but why it happened. Implement continuous monitoring systems that detect and address model drift before it compromises performance or introduces bias.



Trend 5

Quantum advantage will demand strength in numbers.

Quantum computing has moved well-beyond wishful thinking: Recent research indicates that quantum advantage is likely to emerge by the end of 2026.

Quantum advantage refers to the point at which a quantum computer can provide a solution to a problem with demonstrable improvement over any classical method or resources in terms of accuracy, runtime, or cost requirements. But here's the catch: At scale, quantum demands resources no single organization can realistically maintain alone. It takes more computational muscle, richer datasets, and deeper pools of expertise. In short, it takes an ecosystem—or maybe a few.

Consider the challenge of designing next-generation battery storage to meet growing energy needs. A quantum computer can simulate molecular interactions at unprecedented scale, but it needs vast chemical databases from research institutions, real-world performance data from manufacturers, and application insights from automotive or electronics partners to design realistic innovations. When quantum processors can tap into databases across the energy ecosystem, the result isn't just faster discovery—it's entirely new classes of materials.

Then there's the challenge of staying ahead in fast-moving financial markets. With the combined power of live data from exchanges, economic indicators from central banks, and sentiment analysis from news providers, quantum computers can help banks accelerate the trading process. Ecosystem data makes it possible to uncover hidden pricing signals, inform better bets, and optimize activities down to the microsecond.

Organizations that are farthest along on the quantum journey see the writing on the wall: Quantum-ready organizations (QROs)—those that rank in the top 10% of our 2025 Quantum Readiness Index—are three times as likely to belong to multiple ecosystems as other organizations.[8]

Regardless of an organization's progress toward quantum advantage, ecosystem integration is a scale multiplier: 79% of executives say ecosystem partners help accelerate technology adoption and 77% say data from these partners improves business outcomes (see Figure 7).

Tapping the right data—and the right compute capabilities—for each business need lets organization operate with next-level precision. It's the difference between incremental gains and market-shaping breakthroughs. The companies forging the best ecosystem alliances today aren't just winning the race today. They're positioning themselves to lead in the quantum era.

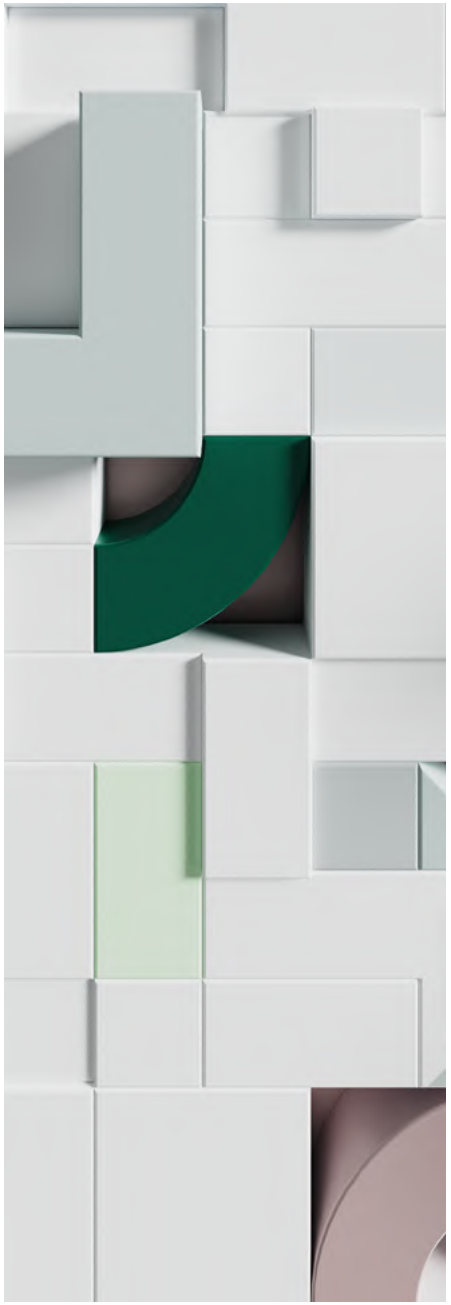
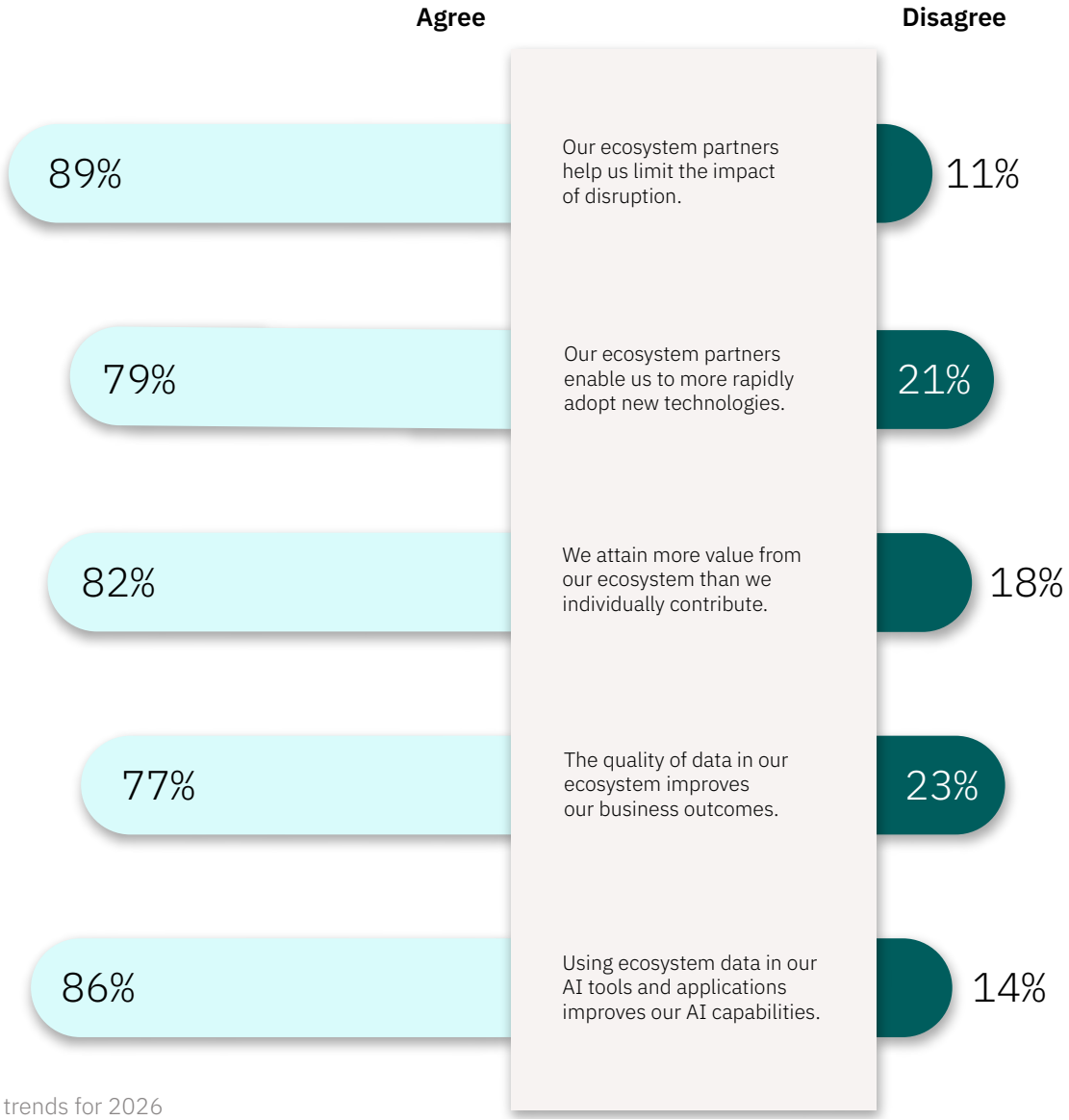


Figure 7

Ecosystems enable greater agility and innovation.

Percentages reflect executive agreement with statements about their ecosystem partnerships.



What to do

Prepare for the next big breakthrough.

Identify big bets to win with emerging technologies, including quantum, and partner on innovation to share costs, reduce risk, and accelerate learning. Prioritize partners that are open, highly trusted, and collaborative innovators, and that come to the table with complementary data and capabilities. Train AI agents on ecosystem data to make them more cost-effective and easier to update as needs change.

Research methodology

To investigate the key trends shaping the business landscape in 2026, the IBM Institute for Business Value conducted research based on a dual-perspective approach. The study gathered quantitative data through two distinct, large-scale surveys of senior executives and global consumers and employees.

Executive survey and sample composition
In partnership with Phronesis, we surveyed 1,028 C-suite executives from large, enterprise-scale organizations across 20 major industries. The sampling frame was designed to ensure a comprehensive cross-industry view, with significant representation from banking (11%), government (11%), and a combined consumer sector (retail at 6% and consumer products at 5%). Other substantial sectors included insurance (6%), telecommunications (6%), energy and utilities (6%), automotive (7%), and petroleum (5%).

The respondent pool was composed of senior leadership to provide a strategic, organizational-level perspective. The sample included a balanced distribution of key roles: Chief Executive Officers (12%), Chief Financial Officers (13%), Chief Information Officers (12%), Chief Human Resources Officers (12%), Chief Supply Chain Officers (11%), and other C-level functions, including Chief Technology Officers (10%), Chief Marketing Officers (10%), Chief Operating Officers (10%), and Chief Data Officers (10%). The organizations represented were substantial in scale, with a median annual revenue of approximately USD9.2 billion, underscoring that the findings reflect the priorities and challenges of major corporations.

Consumer survey and sample demographics
To complement the executive viewpoint, we also surveyed 8,500 consumers in partnership with Suzy. The sample was exclusively composed of individuals who are employed full-time, ensuring the perspectives captured are directly relevant to the current and future workforce. The cohort included individuals across a wide range of ages, split evenly across the following groups: 18 to 28, 29 to 44, 45 to 60, and 60+. Critically, the sample was highly knowledgeable about artificial intelligence: 71% of respondents reported having a basic to strong understanding of how AI works and 9% self-identified as AI experts. This indicates that the consumer data reflects informed opinions on AI's role in business and society.

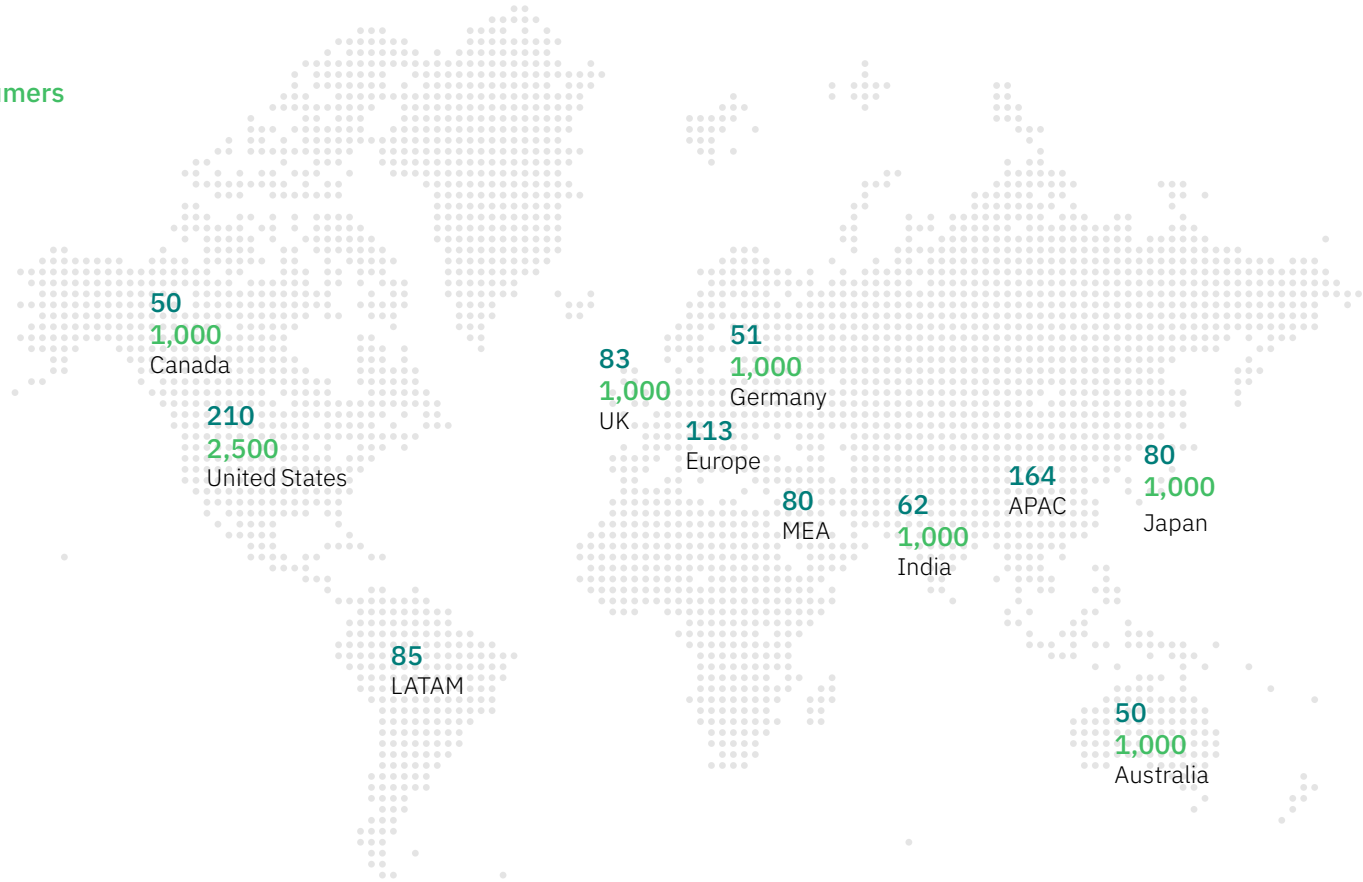
Analytical approach
The analysis proceeded in two key stages. First, descriptive statistics, including frequency analyses and demographic cuts, were used to identify primary trends and establish a baseline understanding of the data from both populations.

Second, a series of regression analyses were conducted on the executive data to uncover the factors influencing various strategic outlooks. Of particular interest was a model designed to identify the key predictors of the belief that economic and geopolitical volatility will create new business opportunities in 2026.[9] This analysis isolated the most significant drivers of an opportunistic stance, moving beyond correlation to quantify their influence on executives' perspectives.

Global representation

Numbers reflect the quantity of executives and employees/consumers surveyed in each location.

Executives
Employees/Consumers



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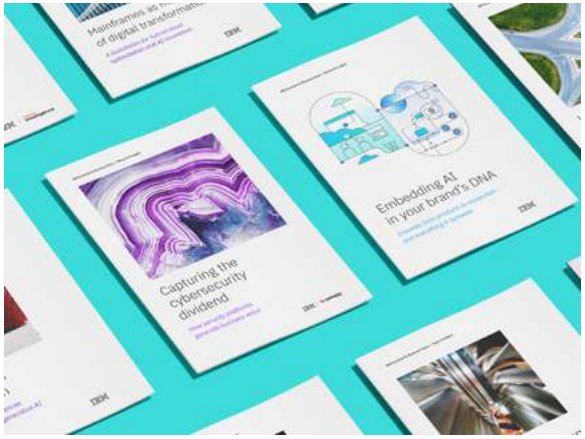

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Notes and sources

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9 Multinomial logistic regression model is statistically significant (likelihood ratio chi-square = 87.9, df=3, $p < .001$), providing a better fit than a model with no predictors. The model explains between 7.4% and 12% of the variance in outlook (pseudo r-square).

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