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EY US July 2026 AI Pulse Survey: The reckoning over AI cost and value has begun

AI transformation is continuing to surge as more businesses achieve success, but costs are coming under scrutiny, new EY research shows.

Senior business leaders have identified key AI use cases such as software development, but their monitoring of usage costs may need to be more precise.

Of the senior leaders who are investing in AI, **82% say their organization is concerned about AI token usage and related costs,**

yet **only 64% say their organization actively monitors AI token usage** and has a clear budget in place.

Senior leaders nonetheless remain bullish on the promise of AI, especially those who are spending more.

98%* say they have already seen a positive ROI from their AI investments.

Senior leaders at organizations that commit 25% or more of their total budget toward AI investments are more likely to say their organization experienced significant positive ROI in:

Cybersecurity: 45% vs. 32%

Customer satisfaction: 41% vs. 31%

Perhaps not surprisingly, **roughly twice as many organizations* are expanding and speeding up AI projects** as compared to putting on the brakes.

AI token usage and related costs have caused organizations to reconsider:

The scope of their AI rollout:

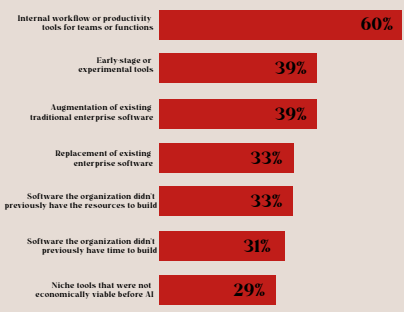
37% are expanding it vs **15%** are reducing it

The pace of their AI rollout:

29% are speeding it up vs **15%** are slowing down

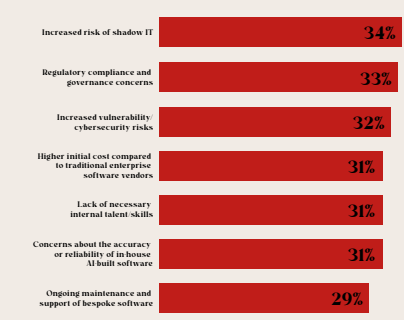
Most organizations* (91%) believe in-house, AI-built software development for internal use is a critical way to de-risk reliance on traditional enterprise software vendors.

Types of custom software companies are using AI to build for internal use among those investing in AI and that have fully deployed/are piloting AI to develop in-house software:



About three-quarters of senior leaders* (72%) say challenges with AI-built software are slowing progress and they're hitting a wall where cost, talent and trust intersect.

Top barriers for organizations developing in-house, AI-built software for internal organizational use include:



The overwhelming majority of those surveyed (93%)* say they need a proper governance framework to safely allow employees to develop in-house, AI-built software for internal organizational use.

The July 2026 EY US AI Pulse Survey makes clear that recognizing true, long-term value from AI projects requires taking stock of where AI can make a difference and prioritizing accordingly.

As Dan Diasio, EY Global AI Consulting Leader, puts it, "'AI saves time' is no longer a sufficient business case when the costs are mounting. Priorities must be focused on doing different things, not the same things differently."

Download the latest EY US AI Pulse Survey, the fifth in a series of polls of at least 500 US-employed decision-makers from a broad range of sectors.

* Figure refers to percentage of senior leaders whose organizations are investing in AI.