Alithya 2026

Financial services trends and analysis report

Stability First: The top business priorities shaping financial services in 2026



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Introduction

As financial institutions enter 2026, their strategic focus has shifted toward enhancing customer experiences, improving cost efficiency, strengthening cybersecurity, and enabling data-driven decision making. Drawing on insights from more than **150 senior financial services executives** across North America, this report analyzes the findings of Alithya's 2026 Financial Services Survey and highlights four key areas: the top business priorities for 2026, leading technology investments, the most important factors in selecting a technology partner, and satisfaction with existing technology partners. Together, these insights provide a clear view of how financial institutions are positioning themselves for growth, differentiation, and effective execution in the year ahead.

About this report

The results of the survey have been summarized and enhanced with insights from other industry sources to highlight key findings and actionable takeaways. This approach provides financial services organizations with a deeper understanding of the forces shaping their industry and supports smarter, more effective planning for 2026 and beyond. Detailed survey results and analysis are presented in the following sections.



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Key insights

Top business priority for 2026: 60% of respondents ranked

enhancing customer experience as their top business priority



This highlights a strong industry-wide drive to prioritize growth and differentiation through better customer experiences.



Technology investment for 2026:

35.7% of respondents identified

artificial intelligence and machine learning

as their most critical technology investment. This reflects the sector's commitment to leveraging advanced analytics and automation for competitive advantage.

Top priority in a technology partner:

30% Nearly 30% of respondents ranked

Technical capabilities

as the most important trait in a technology partner. Financial institutions are seeking partners with deep expertise to support complex digital transformation initiatives.

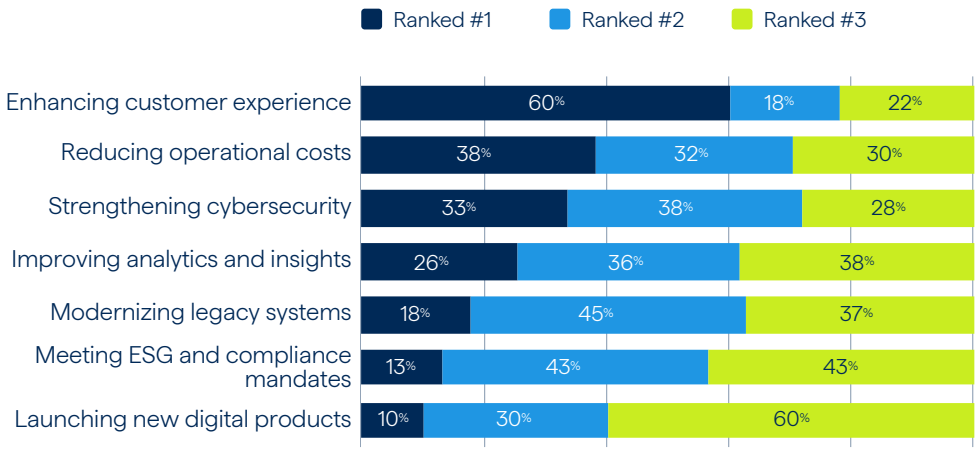
Satisfaction with technology partners:

62.8%



62.8% of respondents report being very satisfied with their technology partners' performance and alignment. This suggests that most organizations feel confident in their partners' ability to deliver on strategic goals.

1 What are your organization's top business priorities for 2026?



Summary of the results

The survey results show that enhancing customer experience is the dominant business priority for 2026, with 60% of respondents ranking it as their #1 focus, making it the clear leader by a wide margin. Reducing operational costs (38%) and strengthening cybersecurity (33%) emerge as the next most frequently ranked top priorities, underscoring continued pressure to improve efficiency while protecting the organization. The results suggest that organizations are prioritizing growth and differentiation through better customer experiences, while simultaneously balancing cost control and risk mitigation as essential enablers of long-term competitiveness.

Industry analysis

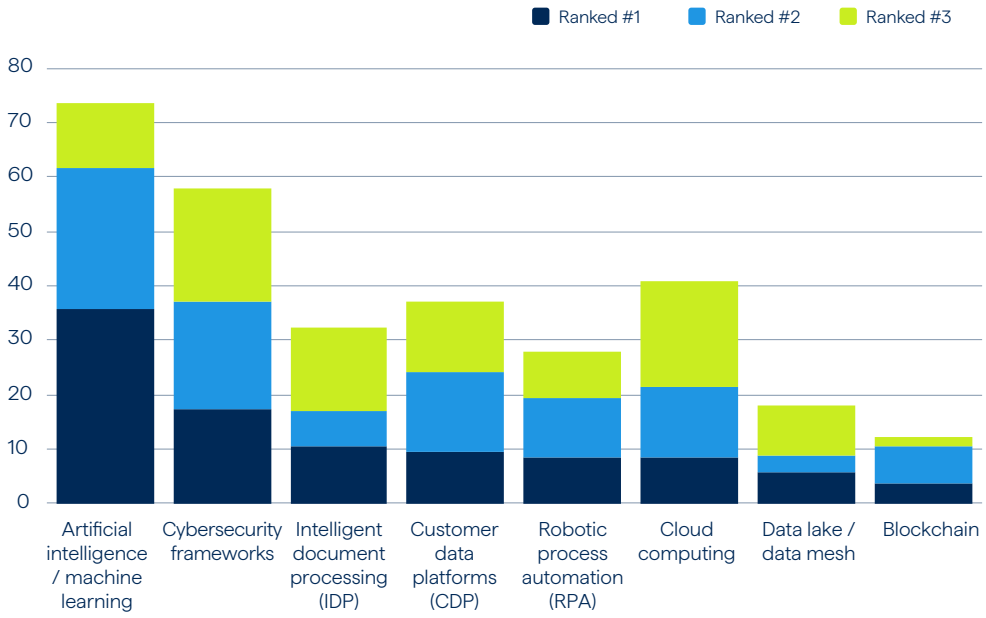
The strong emphasis on customer experience, cost efficiency, and cybersecurity reflects where financial institutions are feeling the greatest operational and competitive pressure. As customer expectations continue to rise, organizations are prioritizing experience-led initiatives while simultaneously managing tight margins and increasing cyber risk exposure, driving leaders to strengthen both front-end engagement and core operations in parallel.

Industry research reinforces these findings. According to Deloitte's Banking Data & Analytics Survey, 94% of banks view data quality as essential, underscoring the role of analytics in enabling better customer experiences and more efficient decision-making. Similarly, EY/IIF's Global Bank Risk Management Survey identifies cyber resilience as a top strategic priority, driven by escalating threats and heightened regulatory scrutiny.

Together, these insights point to a sector recalibrating its priorities around customer trust, operational resilience, and sustainable efficiency. As institutions work to control costs, protect customer data, and deliver more personalized digital experiences, the priorities highlighted in this survey signal a shift toward a more secure, customer-centric, and insight-driven operating model.

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2 Which technologies are you actively investing in or planning to adopt by 2026?



Summary of the results

AI/ML stands out as the most critical technology investment, with 35.7% of respondents ranking it as their top priority, followed by cybersecurity frameworks (17.5%). These two clearly dominate early-stage investment planning, underscoring a dual focus on intelligence and protection. Technologies such as Intelligent Document Processing (IDP), Robotic Process Automation (RPA), and cloud computing follow, indicating incremental automation and infrastructure modernization efforts.

35.7%
AI/ML

17.5%
Cyberscurity

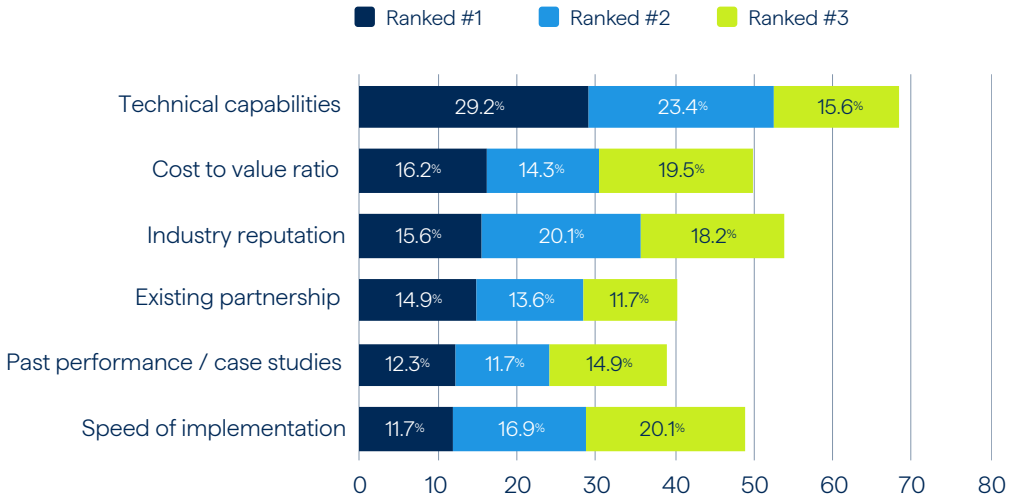
Industry analysis

The emphasis on AI and cybersecurity mirrors current sector realities: Financial institutions are moving quickly to automate decision making and safeguard digital operations. According to PwC's 2024 AI Predictions report, 73% of financial services firms are accelerating AI adoption to boost competitiveness. Simultaneously, Gartner has flagged cybersecurity as a board-level priority, projecting security services to reach **$215 billion globally by 2026**.

This dual priority reveals that financial institutions are embracing intelligent automation, while ensuring they do so within a secure and compliant framework. While emerging tech such as blockchain and data mesh appears in planning, their lower prioritization suggests they are still seen as secondary bets in most transformation strategies.

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3 What is the top priority area you look for in a technology partner?



Summary of the results

Respondents ranked **technical capabilities** as the most important trait in a technology partner, with nearly 30% placing it #1. Cost efficiency and industry reputation followed closely behind, showing that buyers want proven competence, but also value and credibility. Lower-ranked attributes such as "speed of implementation" and "past performance" still had meaningful weight in the #2 and #3 positions, suggesting that speed and historical success are seen as secondary, yet still influential, criteria.

Industry analysis

The top-ranked priority—technical capabilities (29.2%)—reflects a growing demand for partners with deep technical expertise and the ability to implement advanced solutions. This trend aligns with Accenture's findings that 91% of banking executives prioritize partnerships with technically strong providers.

Cost-to-value ratio (16.2%) and industry reputation (15.6%) follow, showing that financial institutions weigh both technical depth and ROI. As budgets tighten, firms are looking for partners who deliver both innovation and economic value.

Attributes such as speed of implementation and past performance ranked lower, suggesting a shift away from "fast and familiar" toward long-term, strategic capability. Gartner supports this, noting that buyers now favor partners who support adaptability and long-term fit.

These results show that financial institutions are becoming more selective, prioritizing expertise, alignment, and strategic value in their technology partnerships.

4 How satisfied are you with the performance of your current technology partners and their alignment with your top priorities?



62.8%
Very satisfied



33.3%
Somewhat satisfied



2.6%
Neutral

Summary of the results

Nearly two-thirds of respondents (62.8%) report being very satisfied with their technology partners' performance and alignment with their strategic priorities. An additional third (33.3%) are somewhat satisfied, while only a small fraction (2.6%) expressed neutrality or uncertainty. These results suggest that most organizations have confidence in the value their current partners deliver particularly in supporting business goals such as digital transformation, AI adoption, and operational efficiency.

Industry analysis

The high satisfaction levels reported in this survey reflect a maturing partner ecosystem, where firms are becoming more effective at selecting and managing strategic technology vendors. According to Forrester's "The State of Strategic Technology Partnerships", companies that embed partner accountability frameworks and co-innovation models see a 2x increase in digital ROI. This aligns with the trend seen here: satisfaction correlates strongly with alignment on priorities, not just delivery. Meanwhile, IDC notes that 68% of financial institutions have restructured their partner engagement models since 2022 to focus on joint value realization, rather than vendor oversight.

That shift toward outcome-driven collaboration is likely fueling satisfaction, especially among firms that see partners as enablers rather than just suppliers.

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Conclusion:

As financial institutions enter 2026, the industry is recalibrating its priorities around enhancing customer experience, cost efficiency, cybersecurity, and data-driven decision making. Survey results show that organizations are investing heavily in AI/ML and advanced analytics to deliver more personalized, efficient, and secure services, while seeking technology partners with deep technical expertise to help navigate complex transformation initiatives. High satisfaction with current partners reflects a maturing approach to strategic vendor selection and alignment with business goals, including customer-centric innovation.

Looking ahead, financial institutions should continue to invest in automation and data intelligence, maintain disciplined cybersecurity and compliance practices, and foster a culture of innovation. Most importantly, placing customer experience at the heart of these strategies will be essential for building trust, driving differentiation, and achieving measurable outcomes. By focusing on these priorities and building strong partnerships, organizations can position themselves for long-term success in a rapidly changing financial landscape.

The future of financial services relies on taking bold steps today. With cybersecurity threats and regulatory pressures, innovation is crucial. By using AI and advanced technologies, your organization can improve customer experiences, increase efficiency, and stay compliant with regulations.

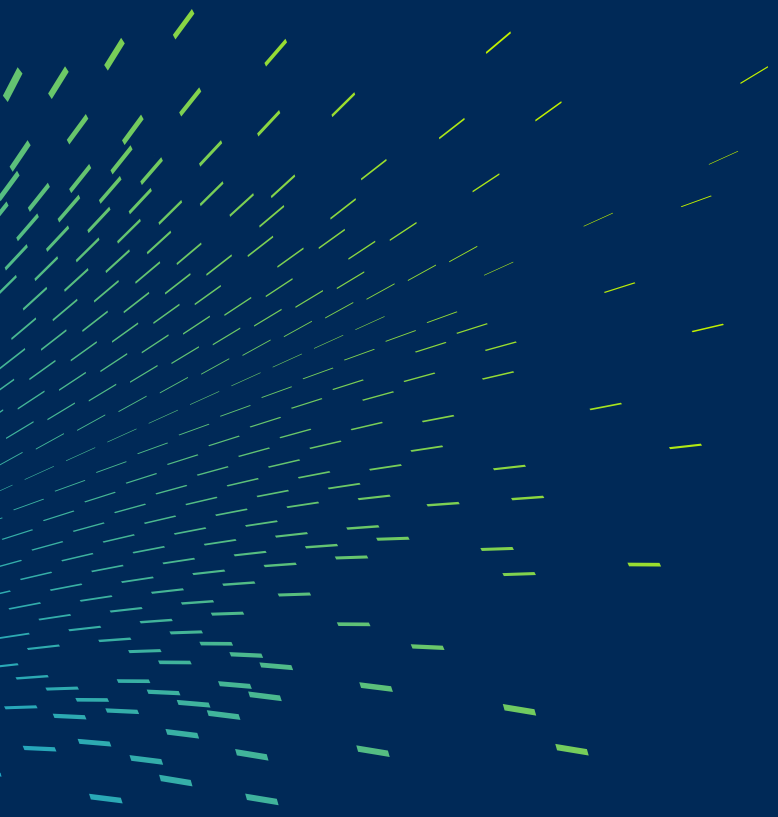
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Growth under pressure:

leveraging cloud, agentic AI & automation to manage complexity across the enterprise

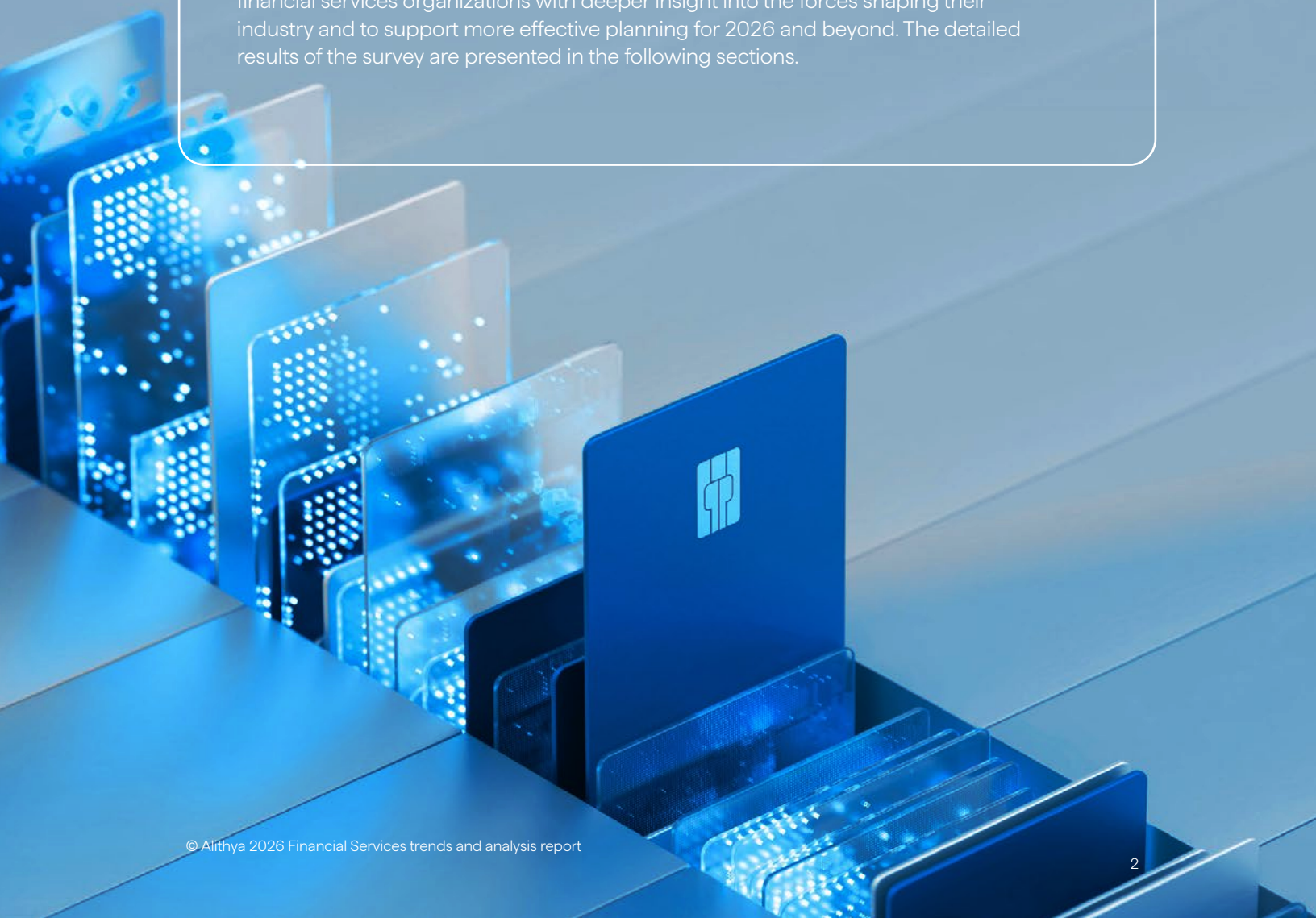
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Introduction

The strategic landscape of financial services is being shaped by rapid advances in cloud modernization, agentic AI adoption, and intelligent automation. This report draws on insights from the 2026 Alithya Financial Services Survey, which gathered perspectives from over 150 senior executives across North America. The analysis focuses on four core areas: satisfaction with cloud adoption, the maturity of agentic AI deployment, the evolution of Robotic Process Automation (RPA), and the key barriers to digital transformation. Together, these findings highlight how organizations are navigating growth under pressure by optimizing operations, managing enterprise complexity, and addressing persistent challenges.

About this report

The data collected has been summarized and enhanced with information from other industry reports to provide key findings and takeaways. This approach aims to equip financial services organizations with deeper insight into the forces shaping their industry and to support more effective planning for 2026 and beyond. The detailed results of the survey are presented in the following sections.



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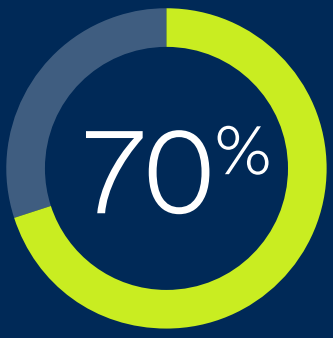
Key insights

93%

Satisfaction with cloud adoption:

Nearly 93% of financial services executives are satisfied or very satisfied with their cloud adoption pace, reflecting strong momentum and confidence in cloud modernization strategies.

Agentic AI adoption:



Over 70% of organizations are actively deploying agentic AI, with one-third optimizing operations enterprise-wide and another 15.6% scaling across departments, signaling rapid movement from pilot to production.

Barriers to digital transformation:



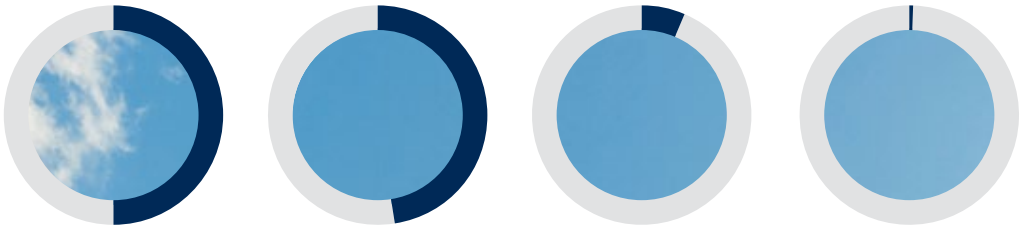
Legacy infrastructure (23.4%) and **budget constraints** (22.1%) are the top barriers, followed by regulatory uncertainty and lack of in-house expertise, highlighting persistent structural and financial challenges.



Robotic Process Automation (RPA) Maturity:

RPA has reached maturity in many firms, with 36.4% scaling across multiple departments; however, 15.6% are migrating away from RPA toward more advanced automation platforms, indicating a shift in automation strategy.

1 How satisfied are you with your organization's current pace of cloud adoption?



50%	42.9%	6.5%	0.6%
Very satisfied ahead of expectations	Satisfied on track	Neutral acceptable pace	Dissatisfied slower than desired

Summary of the results

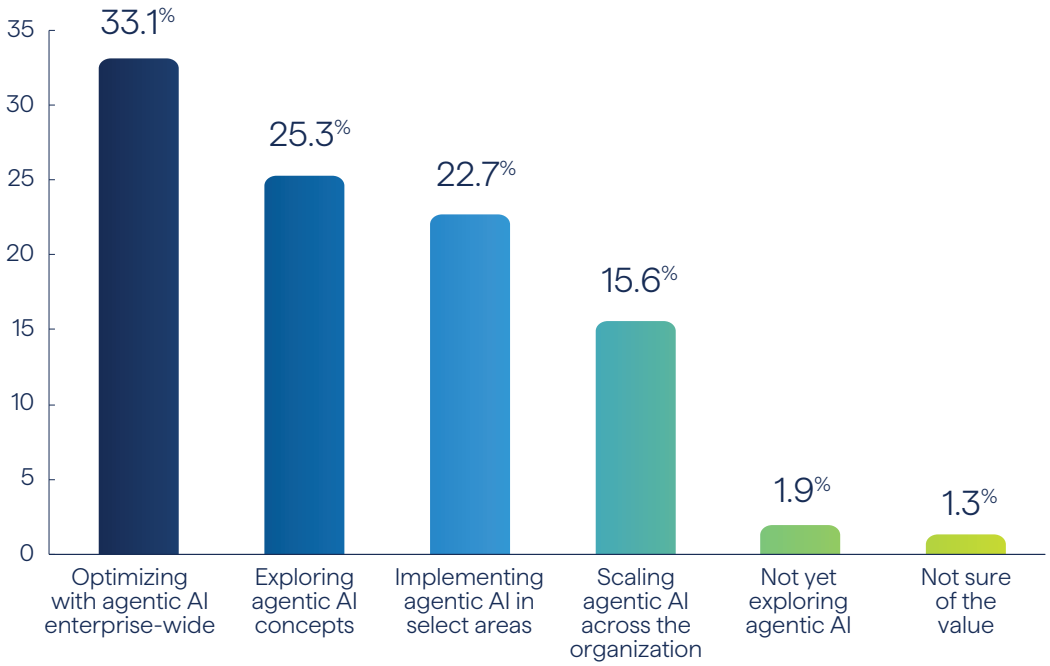
A clear majority of respondents (92.9%) are either satisfied or very satisfied with the pace of their organization's cloud adoption, indicating that cloud modernization efforts are largely on track or ahead of expectations. Only a small minority expressed neutrality (6.5%) or dissatisfaction (0.6%), suggesting that significant delays or concerns are rare among this group. These results point to strong momentum in cloud strategy execution—a shift from previous years where cloud transformation often stalled due to integration complexity or regulatory uncertainty.

Industry analysis

The high satisfaction rate aligns closely with broader financial services trends. According to PwC's Cloud Business Survey, 78% of financial institutions report accelerated cloud adoption over the past 12 months, driven by demand for agility, resilience, and AI readiness. Gartner further reinforces this trend, forecasting that public cloud spending in banking will grow by 22% year over year through 2026. Much of this acceleration is attributed to cloud-native core banking, AI compute capacity, and regulatory-compliant data services.

However, while cloud momentum is strong, firms must still manage compliance, latency, and cost optimization. The fact that nearly 7% are only neutral suggests a minority are still grappling with architectural or cultural alignment.

2 Where are you in adopting agentic AI to improve efficiencies in your organization?



Summary of the results

The responses show that agentic AI is beginning to move from experimentation into production for many firms. One-third of respondents (33.1%) report already optimizing operations enterprise-wide with agentic AI, and another 15.6% say they are scaling implementation across departments.

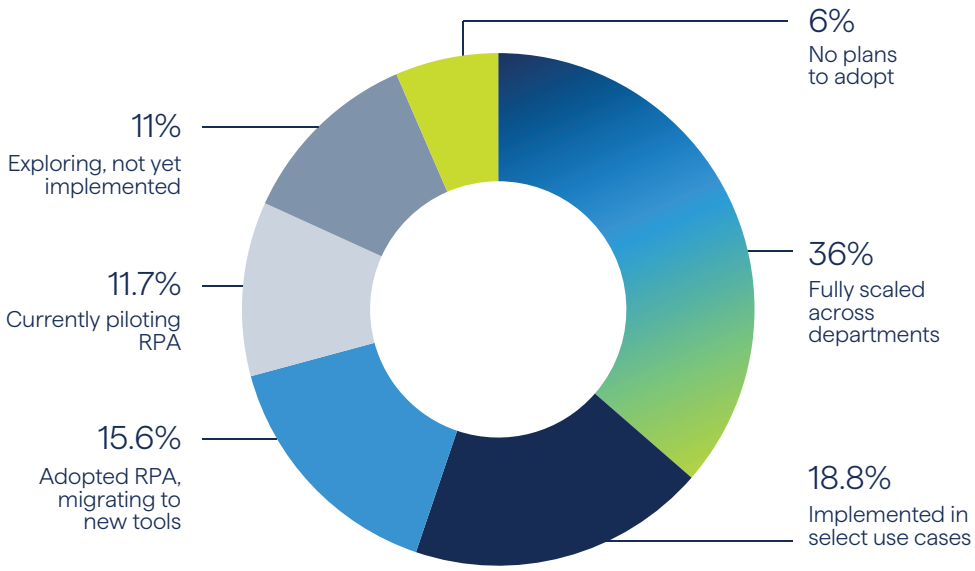
Meanwhile, 25.3% are still in the exploratory phase, and 22.7% have limited implementations underway. Only 3.2% are either not exploring or uncertain of agentic AI's value. This reflects strong momentum in adoption: over 70% of organizations are either scaling, optimizing, or piloting agentic AI to improve operational efficiency.

Industry analysis

The survey data aligns with emerging trends in intelligent automation. According to Accenture's 2024 Future of AI Report, agentic systems are now seen as essential to achieving productivity gains beyond what RPA or basic large language models (LLMs) deliver. Financial services firms in particular are deploying agentic models in areas such as fraud detection, claims triage, and risk monitoring. MIT Technology found that organizations embracing agentic architectures outperform their peers in automation ROI and time to insight, largely due to the ability of AI agents to act autonomously across workflows. Yet challenges remain; as McKinsey notes, enterprise-wide adoption requires careful orchestration between AI systems, data infrastructure, and human oversight. Without trust, explainability, and integration, scaling agentic AI often stalls at the pilot stage.

The research suggests that agentic AI has moved past hype and is entering an operational maturity phase. For financial institutions, the competitive edge will depend on how quickly these systems can be trusted to make decisions, adapt in real time, and integrate across the enterprise.

3 Where is your organization in its adoption of Robotic Process Automation (RPA)?



Summary of the results

The largest share of respondents (36.4%) report that RPA is fully scaled across multiple departments, indicating a high level of operational maturity. Another 18.8% have adopted RPA in limited use cases, while 11.0% are currently in pilot phase. Notably, 15.6% of respondents say they are migrating away from RPA to other tools, suggesting some organizations are transitioning to more advanced automation platforms, possibly involving AI or low-code solutions. A combined 18.2% remain in exploratory stages or have no plans for adoption.

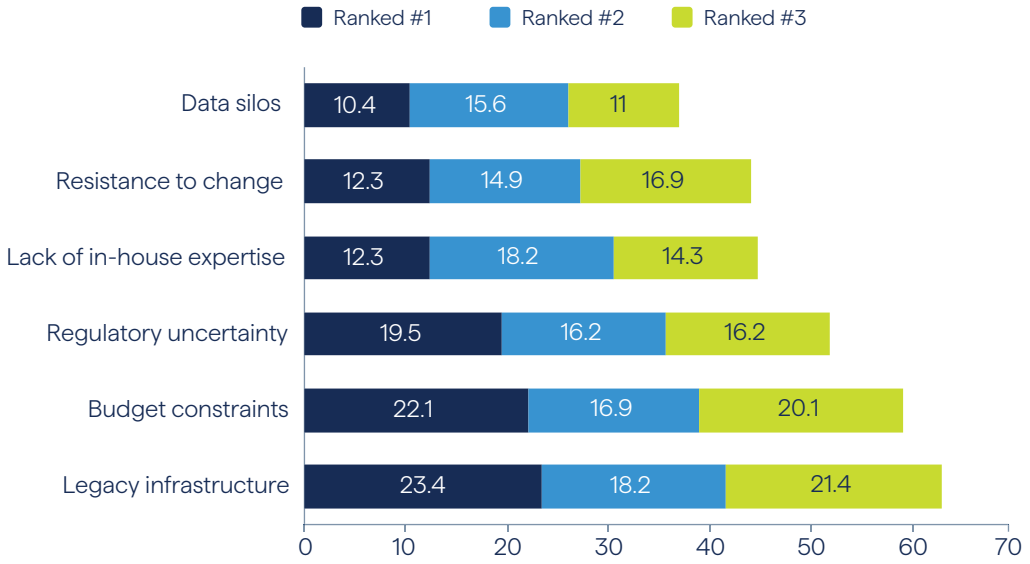
These results show that, while RPA has achieved widespread deployment, some firms are now moving beyond it toward more adaptive or intelligent automation solutions.

Industry analysis

These findings align with current industry trends in intelligent automation. Gartner reports that, while RPA adoption remains strong, many financial services firms are beginning to augment or replace it with AI-powered automation for higher-value tasks. In its 2025 forecast, Gartner notes that RPA remains foundational but is increasingly embedded in hyper-automation strategies that incorporate decision making and learning. UiPath's 2024 Automation Trends Report indicates that over 70% of financial institutions have scaled RPA in at least one department, but a growing number are investing in AI-integrated workflows and cloud-native automation tools to move beyond structured task automation.

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4 What are the biggest barriers to digital transformation at your organization?



Summary of the results

Respondents identified legacy infrastructure (23.4%) and budget constraints (22.1%) as the top barriers to digital transformation. These challenges reflect structural and financial limitations that many financial institutions continue to face. Other frequently cited obstacles include regulatory uncertainty (19.5%) and lack of in-house expertise (12.3%), highlighting the operational and compliance pressures that slow transformation efforts. Though lower in the #1 rankings, resistance to change and data silos remain influential, particularly in the second and third tiers, signaling persistent organizational friction and fragmentation.

Industry analysis

The dominance of legacy infrastructure and budget constraints as top barriers aligns with broader industry findings. For example, McKinsey & Company highlights that banks often struggle to execute their digital strategies due to outdated systems, fragmented data architecture, and organizational silos. Firm budgets, legacy platforms, internal capabilities, and regulatory environments all intertwine, driving what respondents in our survey also identified as the most significant barriers.

Conclusion:

Cloud modernization and intelligent automation are rapidly transforming the financial services sector, with organizations demonstrating high satisfaction in their cloud adoption strategies and accelerating the deployment of agentic AI across operations. The majority of surveyed executives report strong momentum in cloud initiatives, while agentic AI is moving swiftly from pilot projects to enterprise-wide optimization. Robotic Process Automation (RPA) has reached maturity in many firms, though a notable segment is transitioning toward more advanced automation platforms, reflecting the sector's drive for continuous improvement. Despite these advances, persistent barriers such as legacy infrastructure, budget constraints, regulatory uncertainty, and skills gaps continue to challenge digital transformation efforts.

Looking ahead, financial institutions will need to focus on unifying cloud, AI, and automation capabilities into seamless, adaptive workflows to maintain competitiveness. Success will depend on overcoming structural and financial obstacles, investing in talent, and building trust in autonomous systems. As technology evolves, organizations that prioritize integration, agility, and strategic alignment will be best positioned to realize measurable business impact and lead the next phase of digital transformation in financial services.

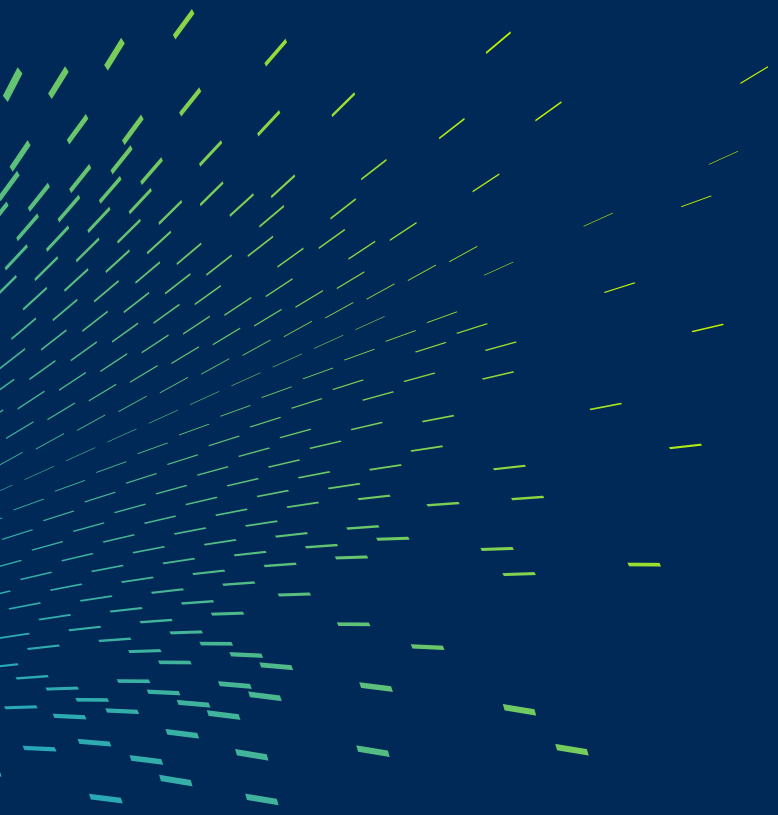
The future of financial services relies on taking bold steps today. With cybersecurity threats and regulatory pressures, innovation is crucial. By using AI and advanced technologies, your organization can improve customer experiences, increase efficiency, and stay compliant with regulations.

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Financial Services: Scaling AI with Confidence

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Introduction

Financial services organizations entered 2026 with strong momentum around AI, automation, and digital modernization. Now, more than halfway through the year, the focus is shifting from interest to execution. Institutions are looking for practical ways to improve efficiency, strengthen fraud prevention, streamline onboarding, and make better use of data in day-to-day decisions. This report draws on findings from the 2026 Alithya Financial Services Survey, which gathered input from more than 150 senior executives across North America. It explores four key areas: the challenges of adopting generative AI, where automation can deliver the most value, how AI is being used in decision making, and how confident organizations feel about meeting evolving compliance requirements. Together, the findings show where financial institutions are making progress, where barriers remain, and what may shape technology priorities through the rest of 2026 and beyond.

About this report

The survey findings have been summarized and supported with insights from other industry reports to provide additional context, key takeaways, and practical perspective. The goal is to help financial services organizations understand how priorities are evolving across AI, automation, decision making, and compliance as 2026 continues to unfold. The detailed survey results are presented in the sections that follow.

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Key insights

Top challenge in adopting generative AI:

66%

66.2% of organizations identified lack of internal expertise and skills as the biggest barrier. This suggests that talent gaps are the primary obstacle to scaling AI initiatives in financial services.

AI adoption in decision making:



74.3% of organizations use AI at least moderately in decision-making. This indicates that AI has become a mainstream tool for supporting strategic and operational choices.

Leading area for automation:

73%

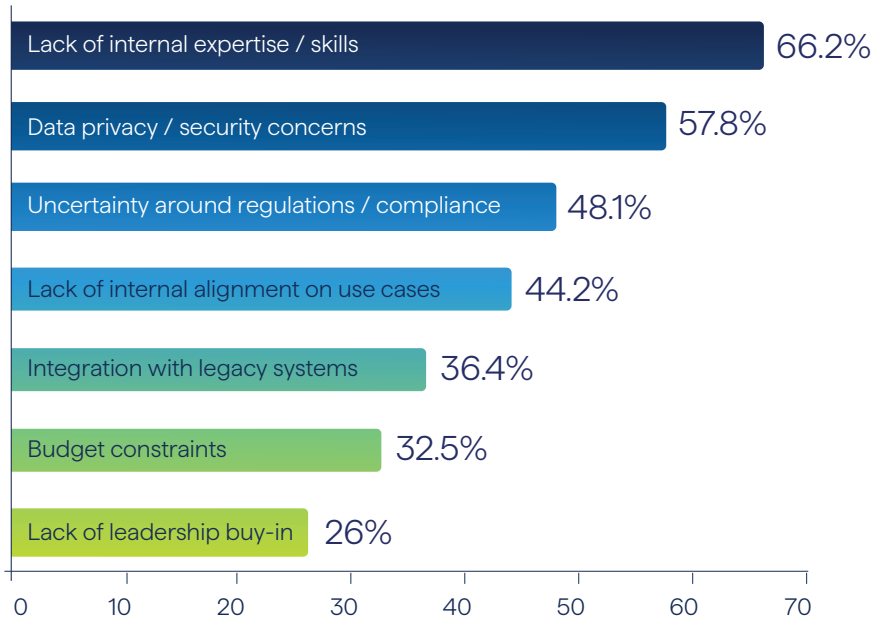
72.7% of respondents prioritized internal operational efficiency for automation. This reflects a strong industry focus on streamlining core processes to boost productivity and reduce risk.



Confidence in Compliance Readiness:

75.9% of respondents feel confident about meeting evolving compliance requirements. This suggests most institutions are prepared for regulatory changes, though some uncertainty persists.

1 What are the biggest challenges your organization faces in adopting generative AI?



Summary of the results

The top challenge cited by respondents in adopting generative AI was a lack of internal expertise and skills (66.2%), followed by data privacy and security concerns (57.8%). These challenges highlight common organizational gaps: the technical knowledge needed to build and deploy GenAI solutions and fears about data control and compliance. Regulatory uncertainty (48.1%) and internal misalignment on use cases (44.2%) further show that many firms are still struggling to define safe and valuable applications for GenAI. Integration with legacy systems (36.4%), budget limitations, and executive skepticism round out the challenge list.

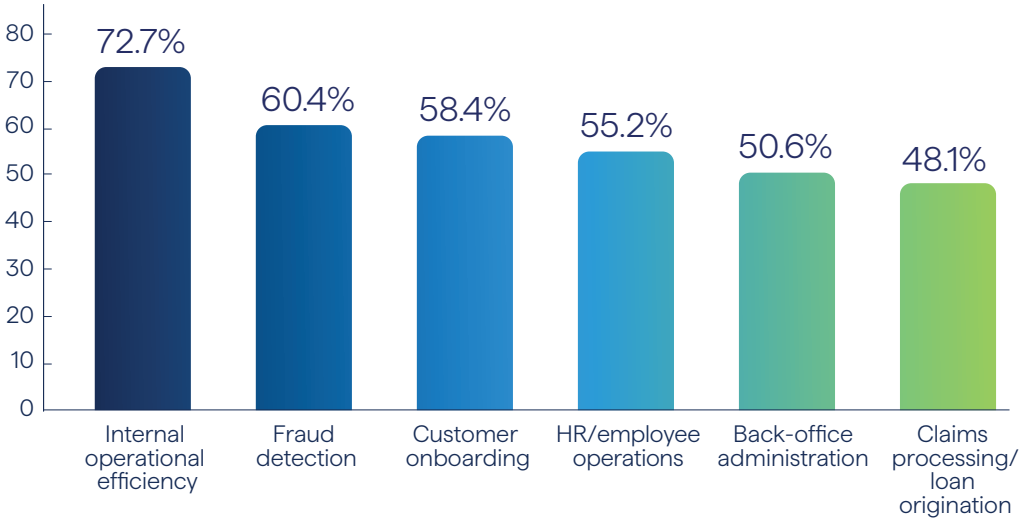
Together, these responses reflect an industry that is eager but cautious, and optimistic about GenAI's potential but navigating real-world roadblocks across technology, talent, and governance.

Industry analysis

These results reflect widespread concerns across financial services and other regulated industries.

Deloitte's 2025 State of Generative AI survey found that 68% of leaders cite lack of internal AI skills as their primary challenge. Financial firms especially worry about safe implementation and responsible scaling. IBM highlights data governance, bias, and model transparency as top enterprise concerns. Many firms struggle to prepare proprietary datasets for GenAI training while complying with data protection laws. These insights affirm that GenAI adoption about aligning skills, infrastructure, leadership, and regulation to safely scale impact.

2 Which area(s) of your operations would benefit most from automation?



Summary of the results

Respondents overwhelmingly pointed to internal operational efficiency (72.7%) as the area most in need of automation highlighting a widespread drive to streamline core processes. Fraud detection (60.4%) and customer onboarding (58.4%) also stood out, reflecting pressure to protect digital transactions and improve time to service for clients. Meanwhile, HR functions (55.2%) and back-office work (50.6%) show strong interest in automating support roles, while claims and loan workflows (48.1%) indicate opportunities for efficiency gains in core product delivery.

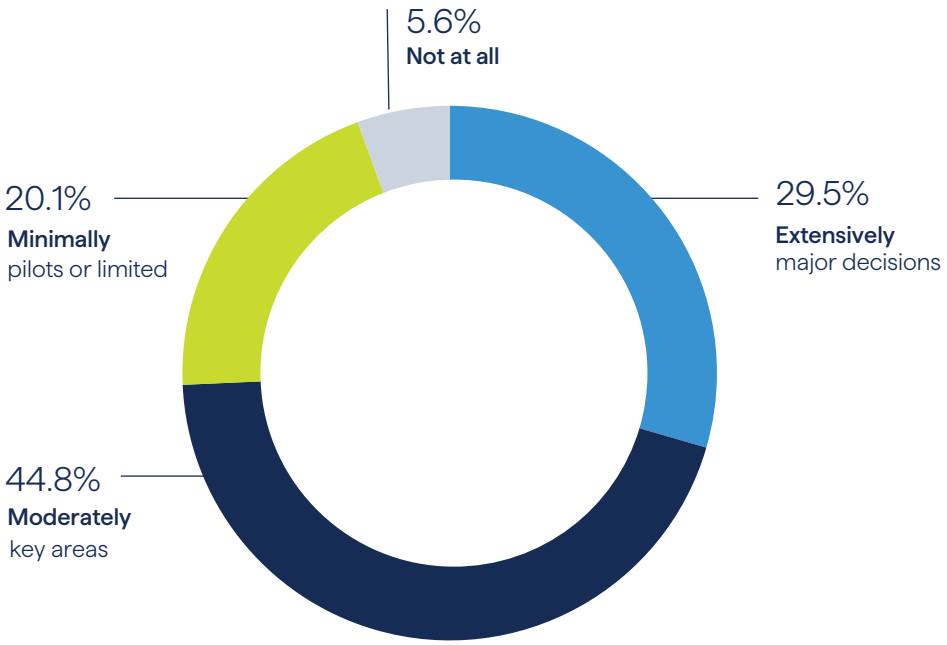
Overall, the results suggest organizations are looking to apply automation broadly but are prioritizing it in areas that directly impact operational speed, security, and customer experience.

Industry analysis

The survey findings where a large majority of organizations cited internal operational efficiency (72.7%) and fraud detection (60.4%) as prime automation opportunities, line up with broader industry trends. For example, McKinsey & Company's report on automation in banking shows that deploying process automation across multiple operational functions can yield significant cost savings and productivity gains, especially when legacy systems are addressed early.

Meanwhile, the global technology adoption report by KPMG notes that financial services firms explicitly identify repetitive task automation (such as back-office processes and employee experience workflows) as their top short-term goal when using AI and related tools. The alignment between survey responses and industry reports reinforces that firms are prioritizing automation where it can deliver high return on investment, reduce risk (e.g., fraud detection) and free up human capacity for higher value activities.

3 To what extent are you leveraging AI for decision making?



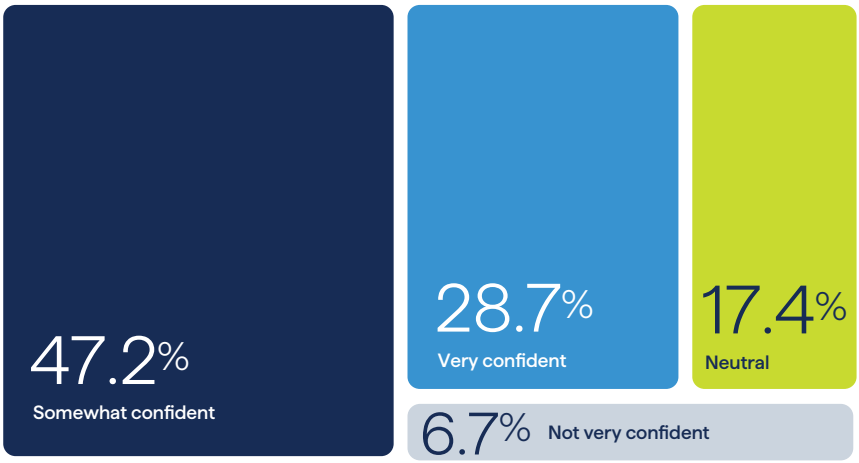
Summary of the results

Nearly three quarters of respondents (about 74.3%) report using AI at least moderately in their decision-making processes. 29.5% say they use AI extensively for major or strategic decisions. While another 44.8% say AI supports some key decision-making areas. Around 20.1% are still in the early phase of minimal usage, and only 5.6% are not yet leveraging AI at all. This suggests that AI-based decision support is becoming mainstream in operations, with most firms past the initial experimentation phase.

Industry analysis

The survey results showing that over 70% of respondents use AI at least moderately in decision making align with broader trends across financial services. The Financial Stability Board (FSB), which monitors global financial risks, also highlights the increasing use of AI in operational and strategic decision making. Their 2025 review notes that financial institutions are rapidly scaling AI to reduce human bias and enhance decision speed, especially in functions such as portfolio management, credit risk, and regulatory compliance. However, they also caution that governance, auditability, and explainability must keep pace with adoption.

4 How confident are you in meeting evolving compliance requirements (e.g., Basel III, IFRS 17, ESG)?



Summary of the results

A combined 75.9% of respondents said they are either very confident (28.7%) or somewhat confident (47.2%) that their organizations will meet evolving compliance requirements. One in six (17.4%) were neutral and a smaller share (6.7%) said they are not very confident. These results suggest that, while most institutions feel prepared for upcoming regulatory shifts, a significant minority remain hesitant or uncertain about their readiness..

Industry analysis

The survey findings reflect broader industry trends where financial institutions are calling out compliance readiness as a strategic imperative. According to the Financial Stability Board's 2024 review of regulatory frameworks, more than 60% of the global banks surveyed cited compliance change as the top business risk for the next two years. These insights make it clear: confidence in meeting regulatory demands is high, but real readiness rests on operational discipline, data integration, process automation, and governance frameworks must all support the promise.

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Conclusion:

The survey results illustrate a financial services sector that is actively pursuing modernization while remaining mindful of its challenges. Organizations are placing strong emphasis on improving operational efficiency and integrating AI into decision-making, yet many are still grappling with internal skills gaps and the complexities of adopting new technologies. Confidence in meeting compliance requirements is generally high, but there remains a segment of institutions that are cautious about their readiness. These results highlight a landscape where ambition is balanced by the need for robust governance and workforce development.

Looking forward, financial institutions are expected to deepen their investments in AI, automation, and cloud solutions to drive productivity and resilience. As these technologies become more embedded in daily operations, the focus will shift toward building internal capabilities, overcoming legacy system challenges, and ensuring ongoing compliance. The organizations best positioned for success will be those that can align strategy, technology, and execution, transforming bold ambitions into measurable outcomes while navigating the evolving regulatory and innovation landscape.

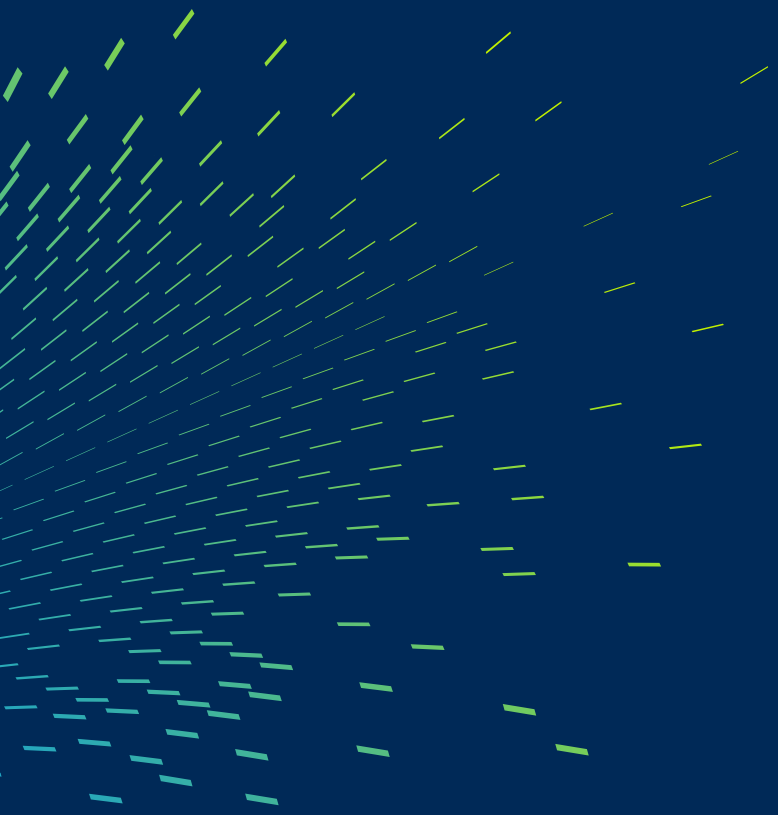
The future of financial services relies on taking bold steps today. With cybersecurity threats and regulatory pressures, innovation is crucial. By using AI and advanced technologies, your organization can improve customer experiences, increase efficiency, and stay compliant with regulations.

Partner with Alithya to turn challenges into opportunities. Connect with us now to learn how we can support your journey toward more efficient, secure, and compliant financial services.

Contact us

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Alithya is your trusted advisor

We are trusted advisors who leverage AI and the latest technologies in our strategic consulting and digital transformation services. We help solve business challenges that enable our clients to unlock new opportunities, modernize processes, and gain efficiencies. We leverage a world-class team of passionate industry experts, AI-based IP solutions, the latest digital technologies, a solid understanding of mission critical business applications, and a partner ecosystem to accelerate results. We've built a foundation of success that includes a specialized global delivery network to provide end-to-end solutions.

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- Project operations
- Cloud infrastructure
- Custom applications development
- Control/software engineering

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- Managed services
- Change enablement
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