Crane

Crane Venture Partners' Annual
Enterprise Technology Survey Report

Fill in the Blank

PRELIMINARY FINDINGS FOR 2026

FILL IN THE BLANK

The **Fill in the Blank** survey is conducted to gain insights into senior enterprise technology buyers' key priorities, challenges, and emerging trends.

Introduction

This report outlines the preliminary findings from the Fill in the Blank 2026 Enterprise Technology Survey, compiled from the responses of 52 senior executives across 34 of the world's leading corporations. The participating companies represent a broad and influential cross-section of the global economy, spanning key sectors such as Financial Services, Automotive, Pharmaceuticals, Industrial Manufacturing, Consumer Goods, and Technology.

Collectively, these organizations represent an estimated annual IT and digital technology buying power well in the billions, making their perspectives a powerful leading indicator of future enterprise investment and strategy. The survey reveals a market at a critical inflection point, grappling with the dual mandate of optimizing core operations while simultaneously pursuing transformative, AI-driven growth.

Executive Summary

The Two Halves of the Enterprise Brain

The most dominant trend emerging from the data is a profound strategic split between two distinct leadership archetypes: The Operator and The Innovator.

The Operator (CIOs, Heads of IT, COOs)

This group is focused on efficiency, security, and resilience. They view AI as a tool for automation and productivity, with their primary concerns being cybersecurity, data integration across legacy silos, and proving hard financial ROI. They are tasked with fortifying and optimizing the core business.

The Innovator (CTOs, CDOs, Chief Innovation/Marketing Officers)

This group is focused on growth, disruption, and competitive advantage. They see AI as the engine for new business models and revenue streams. Their primary concerns are model accuracy, real-time data availability, and finding bold new technologies to redefine their markets. They are tasked with inventing the future of the business.

This fundamental divide in priorities, risks, and measures of success informs every aspect of their technology strategy and purchasing decisions.

Key Trends Shaping the AI Era

Trend 1: The Boardroom Mandate is Bifurcated

Board-level pressure reflects the Operator/Innovator split. CIOs are being asked, “How are we reducing cost and managing risk?” In contrast, CTOs and CDOs are being asked, “How are we beating the competition and creating new revenue?” This dictates their immediate investment priorities.

Trend 2: The Data Foundation Remains the Biggest Bottleneck

Despite years of investment, data remains the greatest obstacle to scaling AI. Operators (CIOs) overwhelmingly cite “Integration across silos” as their top challenge, a battle against decades of legacy infrastructure. Innovators (CTOs/CDOs) are more concerned with “Real-time availability” and “Data quality,” which are essential for the product-centric AI they are building.

Trend 3: A Two-Front War for Talent

The skills gap is not monolithic. Operators are fighting a battle for talent in “Change management & adoption” and “AI governance, compliance & ethics.” They need people who can safely integrate AI into the existing workforce. Innovators face a critical shortage of the builders themselves: “AI engineering & model ops” and “Data science & analytics” talent.

Trend 4: Startups Face a Dual Proving Ground

How enterprises partner with startups depends entirely on who they are talking to. Operators demand “Proven ability to integrate into enterprise stacks” and “Clear ROI metrics.” They want low-risk, high-value partners. Innovators are seeking “Bold innovation not yet available from incumbents” and “Speed to value,” prioritizing disruptive potential over established credentials.

Voices from the Field:

Executive Perspectives

Direct perspectives from five participating executives on the challenges and opportunities of this era:

CTO of Leading Automotive Company

“The vehicle has become a software platform on the edge. Our primary focus is not just on automating driving, but on using AI to power a universe of high-margin, recurring-revenue services inside the car. This is no longer about horsepower; it’s about processing power and the customer experience it unlocks.”

CIO & Head of Technology Risk, Global Financial Services Company

“In our industry, the adoption of AI is a trust-based equation. The number one question is not ‘what can it do?’ but ‘how can we prove it is secure, compliant, and fair?’ Our mandate is to enable innovation within a fortress of resilience. There is no other way.”

Chief Digital, Data, Analytics, and Technology Officer, Healthcare Company

“We have a historic opportunity to move from reactive sick-care to proactive, personalized healthcare. The challenge is unifying data from our retail, pharmacy, and insurance businesses to create a single, intelligent view of the customer. AI is the engine that will turn that data into better health outcomes at scale.”

CIO & COO, Transportation Supply Chain

"For us, AI is not an abstract concept; it's about autonomous robots navigating a warehouse and algorithms rerouting global shipments to avoid disruption. The business case is measured in seconds saved, errors eliminated, and tons of carbon reduced. Our biggest opportunity is creating a fully autonomous, self-optimizing logistics network."

Chief Digital and Marketing Officer, Leading Beauty & Fragrance Company

"Beauty Tech is the new frontier of customer engagement. We are moving beyond selling a product to offering a personalized service. AI and AR allow us to provide diagnostics and recommendations to every customer, on any device, anywhere in the world. This is about creating a one-to-one relationship with a billion consumers."

Sector Overview

Sectors Represented

Aerospace & Defense
Automotive, Financial Services
Pharmaceuticals & Healthcare
Industrial Manufacturing
Engineering & Construction
Consumer Goods & Retail
Logistics
Telecommunications
Technology Services
Gaming

What Leaders are Saying about AI

"This isn't just another technology cycle; it's a fundamental rewiring of how knowledge, creativity, and economic value are generated. It's a paradigm shift on par with the industrial revolution, but happening at the speed of software."

CEO, Global IT Services & Consulting Company

" For over a century, the soul of our industry was the internal combustion engine. We are witnessing the end of that era. The next hundred years will be defined by the AI engine. This is a once-in-a-lifetime transformation."

CTO, Major Automotive Company

"For the financial system, which is built on information and trust, this is a moment of profound consequence. It presents an opportunity to model risk and serve clients with a precision we've never had. But it also introduces a new level of systemic risk that we must manage with extreme care."

Head of Technology and Operations Risk & CIO, Financial Services Leader

"The first industrial revolution gave us the mechanical power to reshape the physical world. This is the next chapter. AI is giving us the cognitive power to understand and optimize that world with a level of intelligence that was previously unimaginable."

Group Executive, Strategy and Development, Leading Energy Company