Google Cloud

The ROI of AI 2025

How agents are unlocking the next wave of AI-driven business value.

BRILYANT

Foreword

Thank you for interest in this eBook.

As a Google Cloud partner, we at Brilyant IT Solutions are committed to providing you with the resources and insights you need to make informed decisions about your cloud journey.

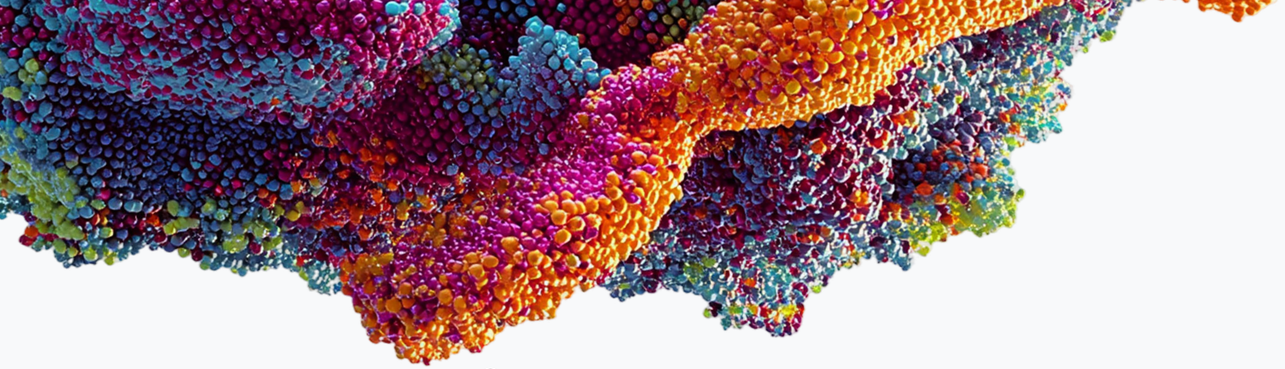
We believe that this eBook will provide valuable insights into the benefits and capabilities of Google Cloud. Brilyant is equipped to support you with driving measurable business impact by helping your organization unlock the full potential of AI on Google Cloud.

If you have any questions or would like to discuss your specific requirements, please do not hesitate to contact us.

Sincerely,

Brilyant IT Solutions

Google Cloud
Partner



Executive summary

As the AI hype settles, the conversation has shifted to value. Leaders are no longer asking if they should use AI, but how they can scale proven use cases and build sophisticated AI agents for business value. Our latest research confirms this fundamental change in business mindset.

We have seen AI evolve from predictive to generative. Now, we're in the agentic era, where AI agents can independently execute tasks and make decisions—under human guidance and guardrails. At Google, we think of AI agents as systems that combine the intelligence of advanced AI models with access to tools, so they can take actions on your behalf and under your control. And while this technology is already helping people get more done, many companies are still in the early phases of agentic maturity.

Companies that were quick to adopt AI agents are seeing real returns. They're using agents to improve customer experiences, free up employees for smarter work, and give departments like marketing, IT, and HR a productivity boost. This ROI helps justify bigger investments and get leadership on board for a broader AI scaling strategy.

For leaders charting their AI strategy, this report blueprints the strategies of successful early adopters to help you turn agentic AI into tangible business results.

Oliver Parker
VP, Global Generative AI GTM, Google Cloud

88%

of agentic AI early adopters are now seeing a positive ROI on gen AI[1]

[1] Agentic AI early adopters: n=460; Question text: In what timeframe do you expect gen AI to deliver return on investment (ROI) to the following areas of your business?

Key insights

Chapter 01		Chapter 02		Chapter 03	
AI agents are now being deployed at scale.	**Agentic AI early adopters enjoy a significant advantage.**	**Gen AI continues to deliver returns.**	**ROI is thriving across use cases.**	**Executive backing drives AI success.**	**Challenges still present roadblocks to implementation.**
52% of executives whose organizations use gen AI also have adopted AI agents in production[2]	**88%** of executives from agentic AI early adopter orgs see ROI on at least one gen AI use case[3]	**74%** of executives see ROI on at least one gen AI use case[4]	**39%** of executives saw ROI on gen AI use cases for productivity, customer experience (37%), sales and marketing (33%)[5]	**78%** of executives from organizations with C-level sponsorship report seeing ROI now on at least one gen AI use case[6]	**#1** Data privacy and security is the top consideration for companies when evaluating LLM providers[7]

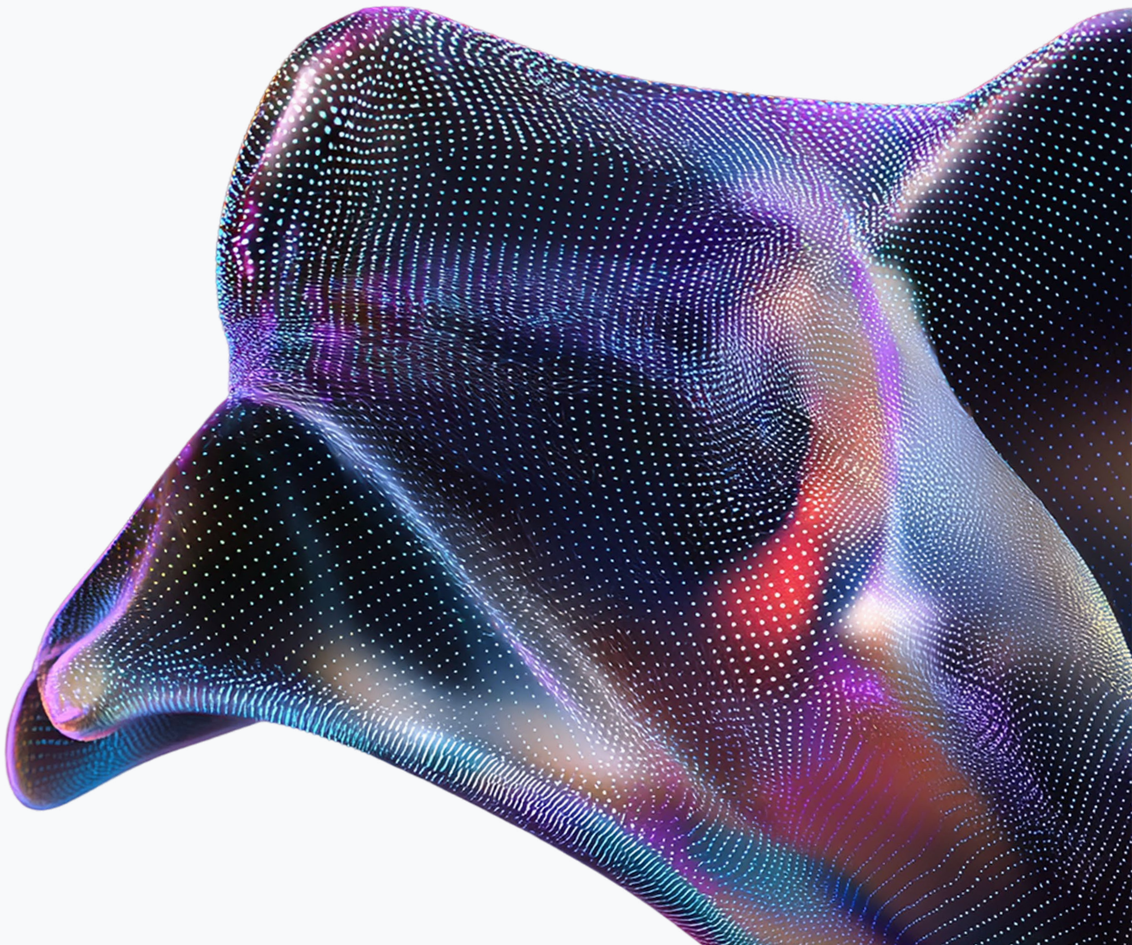
[2] Total (global): n=3466; Question text: (1) How are AI agents leveraged across the enterprise? (2) How many AI agents does your company currently have deployed in production across your organization?
[3] Agentic AI early adopters: n=460; Question text: In what timeframe do you expect gen AI to deliver return on investment (ROI) to the following areas of your business?
[4] Total (global): n=3466; Question text: In what timeframe do you expect gen AI to deliver return on investment (ROI) to the following areas of your business?
[5] Executives whose organization is currently using or planning to use gen AI on use cases: Individual productivity: 2024: n=1451, 2025: n=3271; Customer experience and field service: 2024: n=1445, 2025: n=3285; Sales and marketing: 2024: n=1454, 2025: n=3245 Question text: In what timeframe do you expect gen AI to deliver return on investment (ROI) to the following areas of your business?
[6] Executives who report their organization has comprehensive C-level sponsorship and clear corporate vision for gen AI objectives: n=1269; Question text: In what timeframe do you expect gen AI to deliver return on investment (ROI) to the following areas of your business?
[7] Total (global): n=3466; Question text: Which of the following factors are MOST important to your company when considering LLM providers? Please select the top three.

About this report

This second annual report is based on a survey of 3,466 senior leaders of global enterprises ($10M+ revenue), conducted by Google Cloud and National Research Group.

It provides a comprehensive benchmark of the impact of gen AI on business and financial performance.

Unless otherwise noted, all statistics in this report are derived from the survey and only include those who are using gen AI in production.



Methodology

16-minute online survey with a total of 3,466 business leaders.

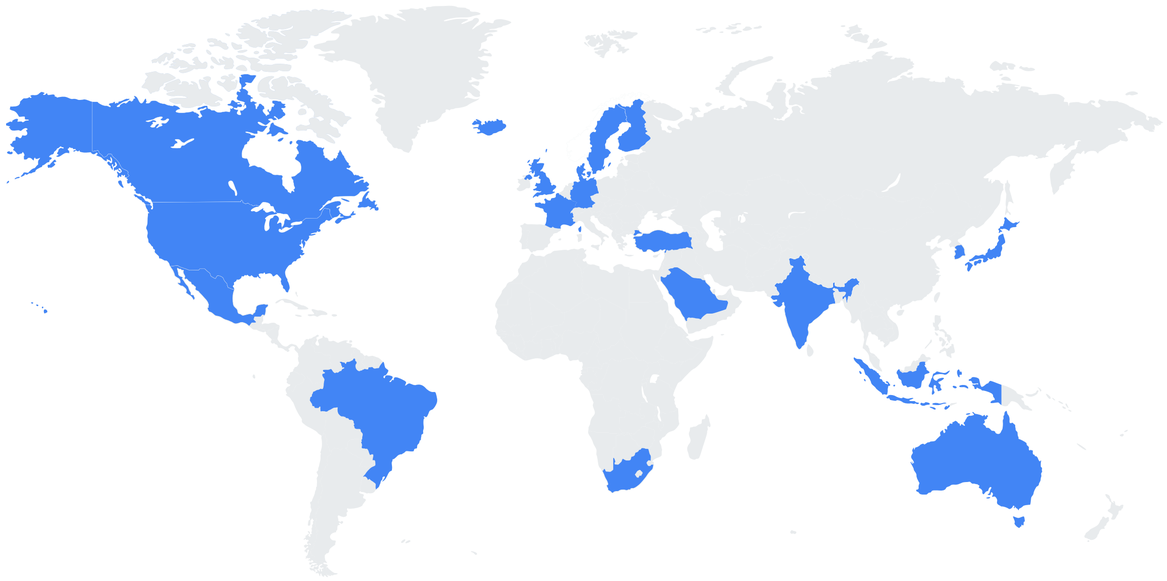
Upper-level, senior executive, and C-suite business leaders, including:

940	CEO, CIO
1,097	CFO, CMO, CTO
768	CISO, CDO, CSO, COO, Director of Digital Strategy, VP of IT
661	IT Director, Head of Innovation, Director of Customer Experience/Service, Marketing Director

Over
100
full-time employees

Over
$10M
annual revenue

Fieldwork conducted April 18–June 3, 2025



US	1,047	France	179	Australia	118	Brazil	351	Kuwait*	3
Canada	200	Nordics	177	South Korea	118	Indonesia	116	South Africa*	7
UK	175	Japan	117	Taiwan	116	Saudi Arabia*	18	UAE*	40
Germany	175	India	117	Mexico	350	Turkey*	35	Qatar*	7

* Markets shown in aggregate as MEA region

A robust representation from priority industries:
Media and entertainment, retail and CPG, financial services, manufacturing and automotive, healthcare and life sciences, telecommunications, and public sector

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01

The agentic shift

AI agents have rapidly emerged as the next competitive frontier

52%

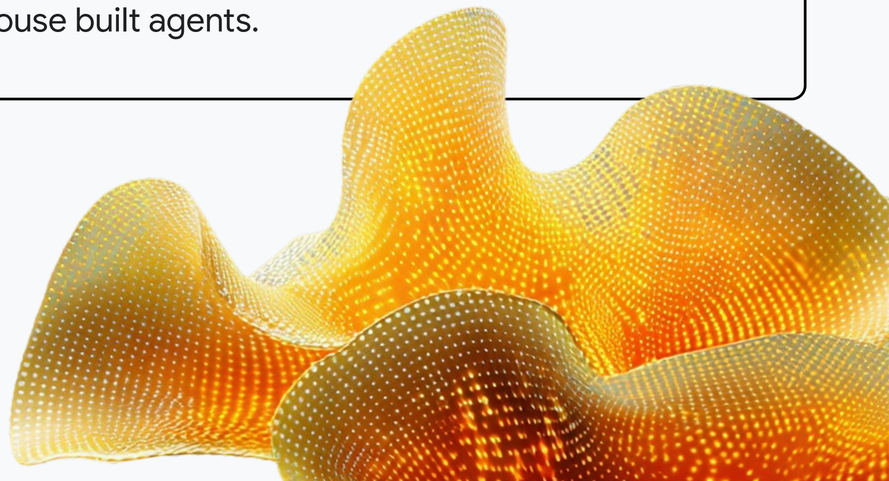
of executives state their organizations using gen AI now also leverage AI agents[8]

Businesses are now implementing a wide range of technologies, from simple chatbots to complex, multi-agent systems that can independently manage complex workflows.

This marks a fundamental shift from AI that simply **assists** to AI that can **operate independently** under human control and guidance. Organizations that are adopting this technology early—backed by executive commitment and increasing funding—are establishing a significant competitive advantage and providing a blueprint for success.

Definition of AI agents used in the survey

AI agents are specialized LLMs that have specific roles, context, and objectives to independently plan, reason, and perform tasks with access to data function call APIs and can interact with other AI agents if needed. These can be pre-built or in-house built agents.



[8] Total (global): n=3466; Question text: (1) How are AI agents leveraged across the enterprise? (2) How many AI agents does your company currently have deployed in production across your organization?

Levels of AI agent maturity

Level 1
Simple tasks

- Chatbots
- Information retrieval
- Image generation

Level 2
AI agent applications

- Customer service AI agents
- Creative agents

Level 3
Multi-agent workflows

- Agentic workflows
- Agent orchestration

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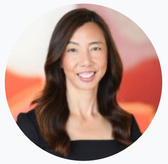
wayfair

AI agents are applicable across a wide variety of use cases, and I believe every business has workflows where agentic AI can deliver meaningful value. It accelerates existing processes, driving measurable business impact.”



Fiona Tan

CTO, Wayfair

AI agents have arrived

Though its core technologies were largely theoretical just a year or two ago, agentic AI is already in widespread deployment—deeply integrated across industries and around the world.

39% of executives say their organization has launched more than 10 AI agents[9]

[9] Total (global): n=3466; Question text: How many AI agents does your company currently have deployed in production across your organization?

RADISSON HOTEL GROUP

"For humans, time is invaluable. AI can amplify people's work to save that time. We're entering an era where humans and machines will have a truly symbiotic relationship."

Velit Dundar

VP of Global eCommerce, Radisson Hotel Group

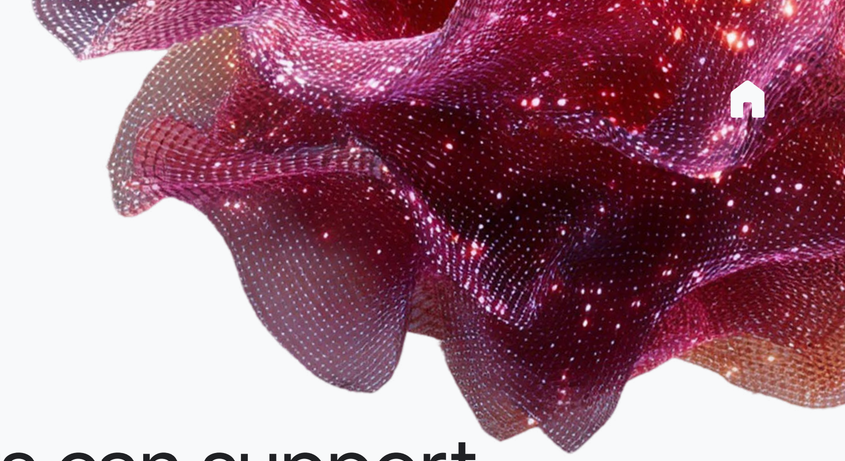
The global footprint of AI agents

The adoption of AI agents is accelerating at a remarkable pace—now rapidly appearing in organizations of every size, sector, and location.

The consistent emergence of AI agents across diverse organizational types points to a powerful, developing trend toward widespread use.

However, the application of AI agents varies by region, as different business imperatives inform the most valuable tasks for agents to take over. Regional priorities shape where these agents show up first—in Europe, for example, AI-enhanced tech support is a key priority. Meanwhile, JAPAC respondents indicated customer service as their organization's top agentic AI use case and LATAM ranked marketing as the key area of potential.[10]

[10] Executives whose organizations are leveraging agentic AI: Europe: n=329, JAPAC: n=447, LATAM: n=395; Question text: What use cases has your company deployed AI agents for?



Deutsche Bank

"AI agents can support humans behind the scenes, and all of that support ultimately translates into improving financial performance."

Christoph Rabenseifner

Chief Strategy and Innovation Officer TDI and Head of Corporate VC Group, Deutsche Bank

AI agent adoption rates

By region*

NorthAm	46%
LATAM	56%
Europe	47%
JAPAC	64%
MEA	59%

* Results are not adjusted or calibrated for cultural bias impacts

NorthAm: n=1247, LATAM: n=701, Europe: n=706, JAPAC: n=702, MEA: n=110

By industry

Retail and CPG	51%
Financial services	53%
Media and entertainment	54%
Telecom	56%
Healthcare and life sciences	44%
Manufacturing and automotive	56%
Public sector	55%

Retail and CPG: n=585, Financial services: n=556, Media and entertainment: n=471, Telecommunications: n=489, Healthcare and life sciences: n=597, Manufacturing and automotive: n=517, Public sector: n=251

By org size

100–499 full-time employees	49%
500–999 full-time employees	56%
1,000+ full-time employees	52%

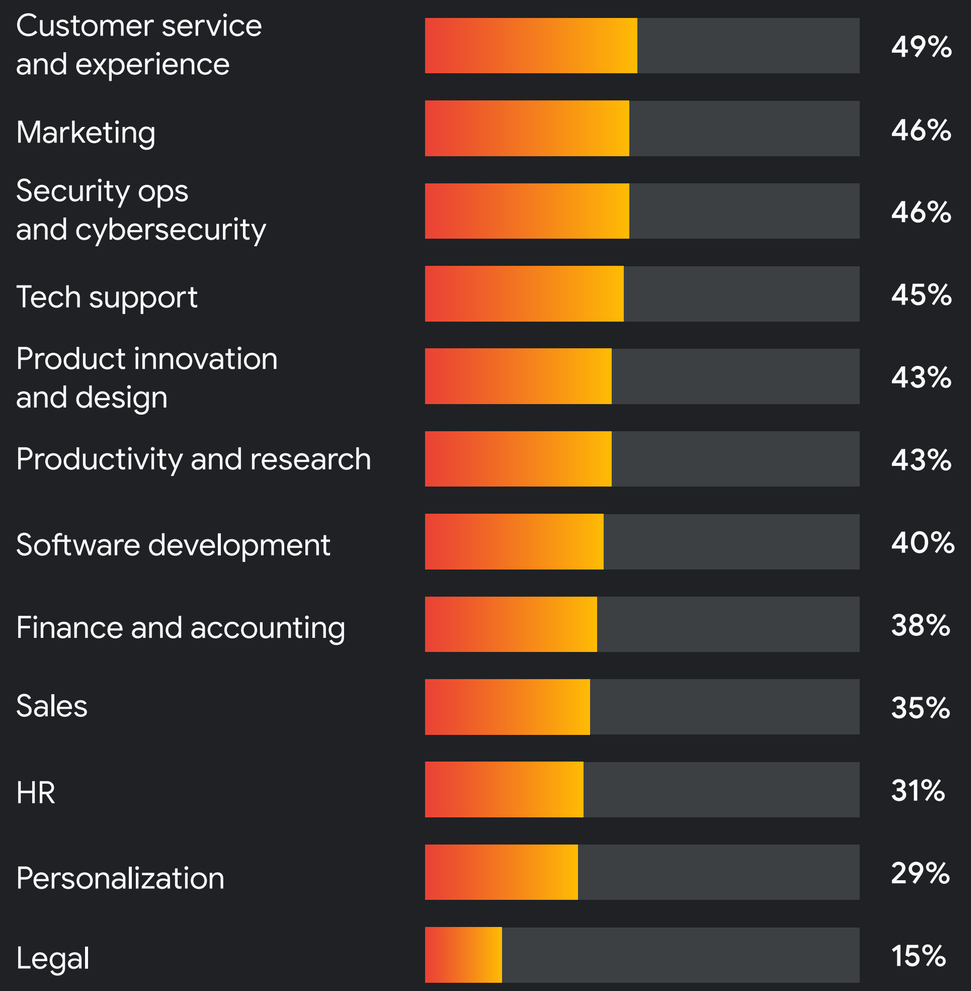
Organizations with 100-499 full-time employees: n=1032, Organizations with 500-999 full-time employees: n=740, Organizations with 1000+ full-time employees: n=1694; Question text: (1) How are AI agents leveraged across the enterprise? (2) How many AI agents does your company currently have deployed in production across your organization?

AI agent use cases in action

From customer service and marketing to security operations and tech support, AI agents are helping people get more done—handling the tedious tasks so they can focus on the work that matters to them.

> Morrisons
>
> Regardless of the industry or your customer base, your competitors will use AI agents. Therefore, you must find a way to use it to your competitive advantage."
>
>
>
> **Peter Laflin**
> Data & Analytics Director, Morrisons

Cross-industry AI agent use cases

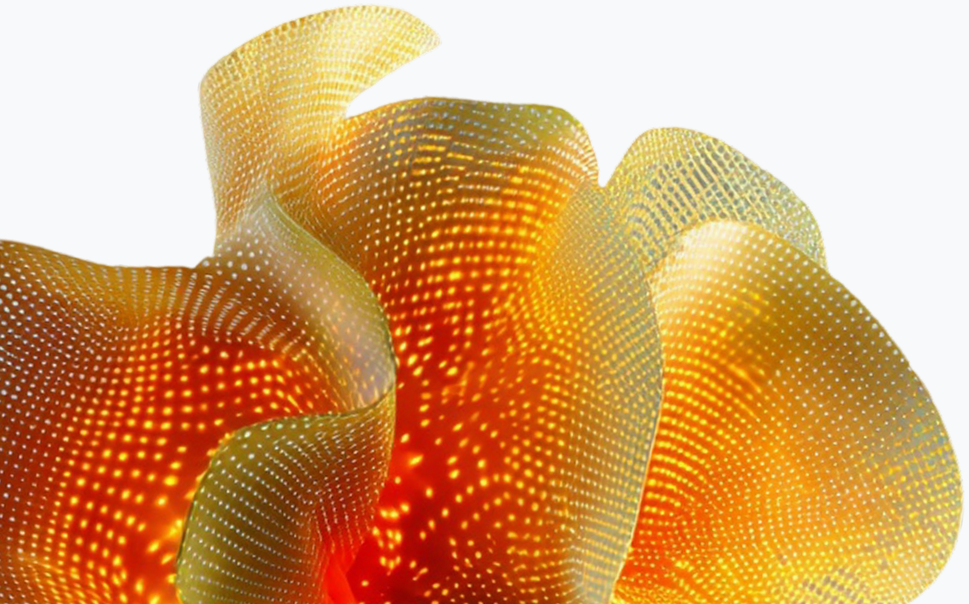


Executives whose organization is leveraging agentic AI: n=1814; Question text: What use cases has your company deployed AI agents for?

AI agent adoption varies across industries

While AI agents are being deployed broadly, every industry has its own priorities—as companies put investment into the use cases that deliver the most significant impact.

It's clear that agentic AI isn't a niche trend confined to the technology sector or large corporations. This deployment represents a fundamental operational shift occurring across the business landscape.



globo

"There are opportunities everywhere for AI agents across the media and entertainment industry. Currently, we're focused on improving media production flow, from idea to distribution."

Bruno de F. Melo e Souza

Director of Engineering, Data & AI, Globo

Top 3 AI agent use cases by industry

Retail and CPG	Financial services	Media and entertainment	Telecom	Healthcare and life sciences*	Manufacturing and automotive	Public sector
47% Customer service and experience	57% Customer service and experience	47% Security operations and cybersecurity	47% Security operations and cybersecurity	49% Tech support	56% Customer service and experience/marketing (tied)	56% Tech support
44% Marketing	48% Marketing	46% Software development	46% Tech support	44% Productivity and research	55% Productivity and research	51% Customer service and experience/software development (tied)
41% Security operations and cybersecurity	46% Finance and accounting/ security operations and cybersecurity (tied)	46% Product innovation and design	45% Customer service and experience	43% Security operations and cybersecurity	54% Quality control	51% Finance and accounting

* Separate lists were shown to survey respondents in the healthcare and life sciences and medical devices industries. Data shown on slide is aggregated to both individual industries.
Executives whose organizations are leveraging agentic AI: Retail and CPG: n=300, Financial services: n=297, Media and entertainment: n=252, Telecommunications: n=274, Healthcare and life sciences: n=261, Manufacturing and automotive: n=292, Public sector: n=138; Question text: What use cases has your company deployed AI agents for?

The early adopter advantage

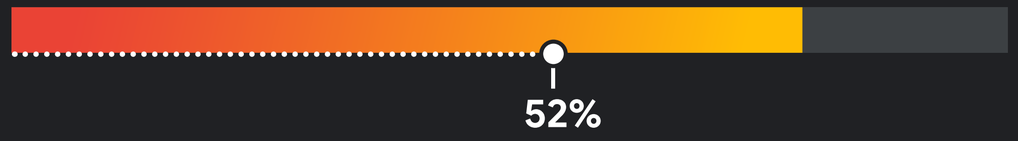
Within the broader landscape of AI agent adoption, a distinct cohort of early adopters is setting themselves apart.

These early adopters dedicate at least 50% of their future AI budget to AI agents and already have agents deeply embedded across operations.

The top performance of early adopters isn't chance—it's the result of a deliberate strategy centered on deep technical capability and organizational commitment.

82% of executives from agentic AI early adopter organizations report their organization has deployed more than 10 AI agents[11] vs. 39% across all organizations[12]

78% of executives from agentic AI early adopter organizations report their organization is leveraging gen AI in production for over a year[13] vs. 52% across all organizations[14]



[11] Agentic AI early adopters: n=460; Question text: How many AI agents does your company currently have deployed in production across your organization?
[12] Total (global): n=3466; Question text: How many AI agents does your company currently have deployed in production across your organization?
[13] Agentic AI early adopters: n=460; Question text: Where is your organization in its gen AI journey?
[14] Total (global): n=3466; Question text: Where is your organization in its gen AI journey?

“

indosat
OOREDOO HUTCHISON

We see all employees at Indosat having a personal agent to amplify our capabilities and improve our overall impact.”

Vishal Gupta

Chief Procurement Officer, Indosat

Your blueprint for AI agent ROI

The success of early adopters provides a clear roadmap for organizations—whether they are building a business case or scaling existing programs.

Leaders in these organizations champion AI in production, sponsor the deployment of multiple agents across the business, and secure dedicated budgets for growth—translating into more consistent ROI.

88% of executives from agentic AI early adopter organizations see ROI now on at least one gen AI use case[15] vs. 74% across all organizations[16]

- **Agentic AI early adopter organizations** have at least 50% of their future AI budget allocated to agents[17]
- **39%** of their organization's total annual IT spend is allocated to AI vs. 26% average[18]
- **Agentic AI early adopters** are more likely to report significant value from gen AI across key areas—including customer experience, business growth, security, and marketing[19]
- Executives from **agentic AI early adopter organizations** are also more likely to report ROI on all cross-industry agentic AI use cases[20]

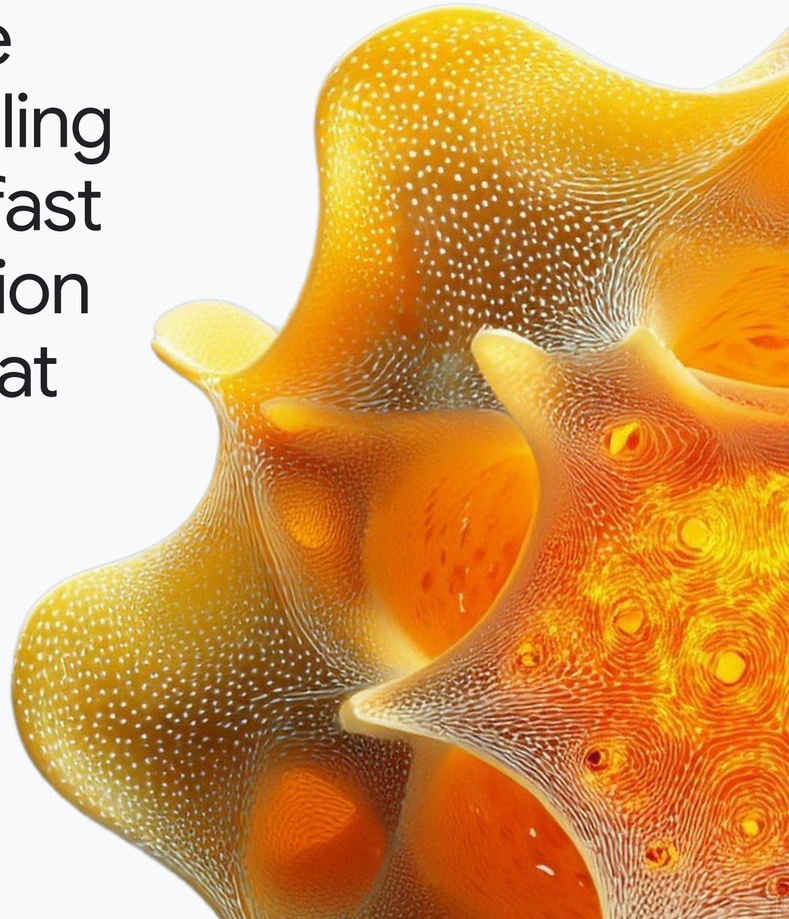
[15] Agentic AI early adopters: n=460; Question text: In what timeframe do you expect gen AI to deliver return on investment (ROI) to the following areas of your business?
[16] Total (global): n=3466; Question text: In what timeframe do you expect gen AI to deliver return on investment (ROI) to the following areas of your business?
[17] Agentic AI early adopters: n=460; Question text: What % of your future AI budget is being allocated to agents? Your best estimate is fine.
[18] Agentic AI early adopters: n=459, Total (global): n=3315; Question text: What percent % of your total annual IT spend is allocated for AI? AI expenses would include Talent, AI Software Licenses, AI Hardware & Infrastructure, AI Application Development. Please exclude data & BI analytics that are not directly using AI or ML. Your best estimate is fine.
[19] Agentic AI early adopters: n=460, Total (global): n=3466; Question text: In which of the following areas have your gen AI solutions created meaningful impact? Please select all that apply.
[20] Agentic AI early adopters: n=456, Total (global): n=1802; Question text: Which of the AI agent types that your company has deployed have seen ROI?

“

You have to look at ROI as not just size of return but also speed of return. AI initiatives are sizable investments that are not commodities yet, so we have to look at where hyper-automation and scaling with AI is actually generating a return first. How fast is your investment coming back to the organization and what capabilities are you investing in now that will scale up and create more efficiencies or business transformation down the road?”

Cristina Nitulescu

Head of Digital Transformation and IT, Bayer Consumer Health

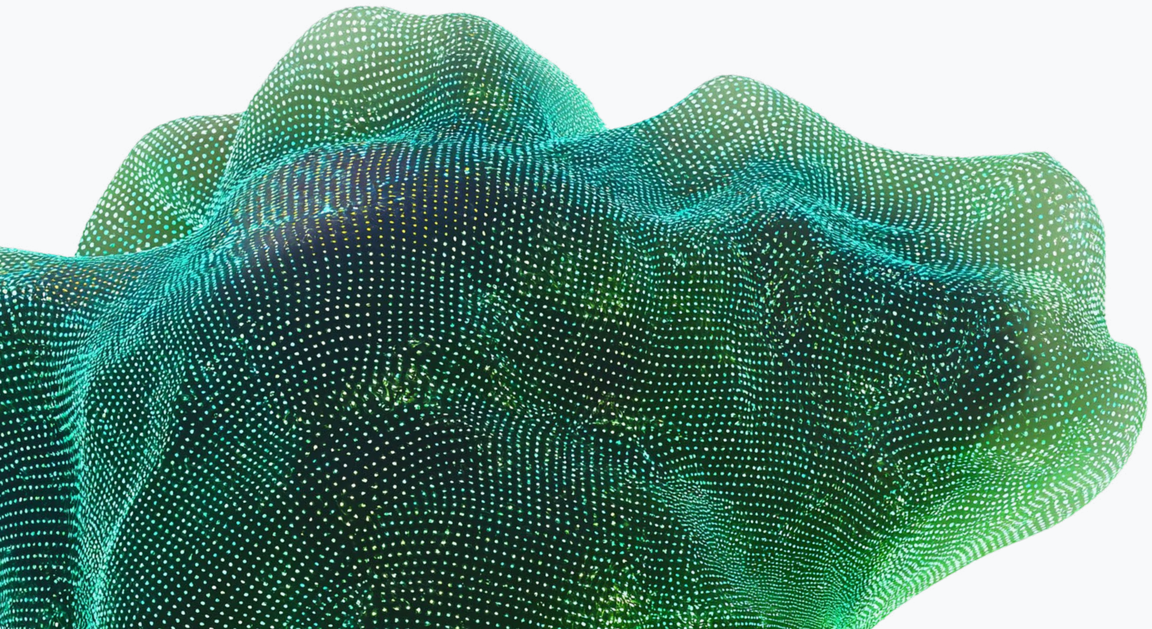


02

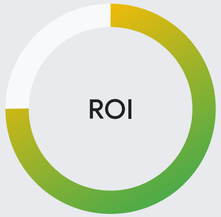
5 proven areas where AI is delivering ROI

We're seeing a virtuous cycle in AI implementation—demonstrable ROI is accelerating the adoption of gen AI for certain use cases, which in turn justifies an even greater focus on those use cases.

After 2024 proved that gen AI really works, 2025 is all about building on that success. Early adopters and leaders are compounding their advantage by layering new AI applications on top of their initial wins.



Our survey assessed the direct value of gen AI across key areas using these 3 measures:



74% report ROI within the first year (unchanged YoY)[21]

53% of those reporting increased revenue estimate gains between 6–10% (vs. 52% in 2024)[22]

51% note their average time to market from idea to use case in production is between 3–6 months (vs. 47% in 2024)[23]

[21] Total (global): 2024: n=1539, 2025: n=3466; Question text: In what timeframe do you expect gen AI to deliver return on investment (ROI) to the following areas of your business?
[22] Executives reporting increased revenue resulting from gen AI solutions: 2024: n=678, 2025: n=1387; Question text: (1) In what ways did your company experience business growth as a direct result of gen AI? Please select all that apply. (2) Based on your past/existing gen AI Initiatives, how much did gen AI directly increase overall annual company revenue? Your best estimate is fine.
[23] Total (global): 2024: n=1533, 2025: n=3459; Question text: What is the average time to market from idea to use case in production? Your best estimate is fine.

Where business leaders see the most value

Five key benefits emerged from the global data set as having the greatest overall gains attributed to gen AI.

While executives' estimates of gen AI value-add are generally more conservative than in 2024, a higher share report improved customer experience.[24]

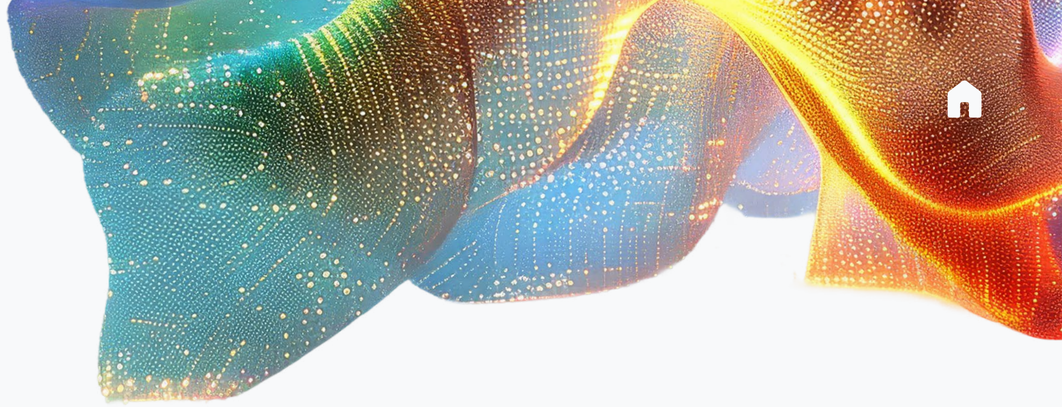
These areas provide a template for executives and senior leaders to re-imagine their organization's business functions once augmented with gen AI. Even a well-tested use case, like using gen AI for chat in customer service, can free up valuable human resources for more challenging tasks.

01	Productivity
02	Customer experience
03	Business growth
04	Marketing
05	Security

[24] Total (global): 2024: n=1539, 2025: n=3466; Question text: In which of the following areas have your gen AI solutions created meaningful impact? Please select all that apply.

Top gen AI impacts across business areas

Business benefits are used to measure the health of technology transformation initiatives and serve as leading indicators of financial performance.



01 Productivity	02 Customer experience	03 Business growth	04 Marketing	05 Security
70% of executives report improved productivity from gen AI (vs. 71% in 2024)	**63%** report improved customer experience from gen AI (vs. 60% in 2024)	**56%** report business growth from gen AI (vs. 63% in 2024)	**55%** report meaningful impact to marketing from gen AI (new to 2025)	**49%** report security improvements (vs. 56% in 2024)

Total (global): 2024: n=1539, 2025: n=3466; Question text: In which of the following areas have your gen AI solutions created meaningful impact? Please select all that apply.

Globe

“With new low-code tools, our experts in marketing, finance, or operations can build their own simple AI helpers to solve their specific problems.”

Francis Pugeda
Director, AI Product Development, Globe Telecom

727%

ROI achieved over three years on average by businesses with Google Cloud

IDC White Paper, sponsored by Google Cloud, The Business Value of Google Cloud Generative AI, IDC #US53278925, July 2025

Employee productivity re-imagined

Among executives reporting increased productivity, a higher share reported non-IT improvements year-over-year.[25] Employee productivity is up, though expectations on improved time to market through AI are down.

70%

report improved productivity (vs. 71% in 2024)[26]

39%

of executives reporting increased organizational productivity indicate their employee productivity has at least doubled as a result of gen AI (vs. 45% in 2024)[27]

Key area where AI is driving ROI now

39% saw ROI on gen AI use cases for individual productivity (emails, documents, presentations, meetings, chat) (vs. 34% in 2024)[28]

Improved employee productivity from gen AI

Executives reporting improved productivity with gen AI solutions: 2025: n=2372; Question text: In what ways did gen AI directly increase productivity for your company? Please select all that apply.

[25] Executives reporting improved productivity from gen AI solutions: 2024: n=1088, 2025: n=2372; Question text: (1) When gen AI helped your employees increase productivity, what was the approximate average % increase in their productivity over a sustained period of time (e.g., several months)? Your best estimate is fine. (2) In what ways did gen AI directly increase productivity for your company? Please select all that apply.
[26] Total (global): 2024: n=1539, 2025: n=3466; Question text: In which of the following areas have your gen AI solutions created meaningful impact? Please select all that apply.
[27] Executives reporting improved productivity from gen AI solutions: 2024: n=1097, 2025: n=2439; Question text: When gen AI helped your employees increase productivity, what was the approximate average % increase in their productivity over a sustained period of time (e.g., several months)? Your best estimate is fine.
[28] Executives whose organization is currently using or planning to use gen AI for individual productivity: 2024: n=1451, 2025: n=3271; Question text: In what timeframe do you expect gen AI to deliver return on investment (ROI) to the following areas of your business?

Use an AI agent to:

Analyze data instantaneously

Objective

Get insights from data stored in a Google Sheet to make better informed decisions.

Action

Open the side panel of a Sheet that contains the data you're looking to better understand and click on the suggested prompt to analyze the data, which will automatically review and analyze it to provide an overview and insights.

Try this prompt

With Google Cloud, businesses saw:

$250k in average annual benefits per 1,000 employees

50% more productive developers

36% more productive end users

IDC White Paper, sponsored by Google Cloud, The Business Value of Google Cloud Generative AI, IDC #US53278925, July 2025

> Humanity hasn't changed in the work environment, but people are more comfortable using AI to fill gaps in their abilities."

Natalie Bowman
Managing Director, Product & Experience Design, Alaska Airlines

A new standard in customer experience

The accelerating, year-over-year improvement in customer experience driven by AI confirms its role as a primary engine for user engagement.

63%

report improved customer experience (vs. 60% in 2024)[29]

51%

of executives reporting improved customer experience indicate improvement in customer experience of 6–10% (vs. 53% in 2024)[30]

68%

of executives from retail and CPG organizations report gen AI solutions have added value to their customer experience (vs. 57% in 2024)[31]

[29] Total (global): 2024: n=1539, 2025: n=3466; Question text: In which of the following areas have your gen AI solutions created meaningful impact? Please select all that apply.
[30] Executives reporting improved customer experience from gen AI solutions: 2024: n=912, 2025: n=2133; Question text: (1) In what ways did your company experience improved user experience as a direct result of gen AI? Please select all that apply. (2) Based on your past/existing gen AI Initiatives, how much did gen AI directly improve user experience? Your best estimate is fine.
[31] Retail and CPG executives: 2024: n=226, 2025: n=585; Question text: In which of the following areas have your gen AI solutions created meaningful impact? Please select all that apply.
[32] Executives whose organization is currently using or planning to use gen AI for customer experience & field service: 2024: n=1445, 2025: n=3285; Question text: In what timeframe do you expect gen AI to deliver return on investment (ROI) to the following areas of your business?

Improved customer experience with gen AI

83% (-2% YoY)

Increased user engagement (i.e., engagement score, traffic or click through rate (CTR), time on site)

75% (-5% YoY)

Improved user satisfaction/ Net Promoter Score

Executives reporting improved customer experience with gen AI solutions: 2024: n=921, 2025: n=2177; Question text: In what ways did your company experience improved user experience as a direct result of gen AI? Please select all that apply.

Key area where AI is driving ROI now

37%

saw ROI on gen AI use cases for customer experience and field service (including chat, call centers, and in-field technician support) (vs. 34% in 2024)[32]

“

For any business, the ultimate goal is to meet customers where they are. A significant advantage is having dependable gen AI consistently available through various channels such as email, text, and chat. Gen AI enables you to build customer experiences that effectively answer questions and complete tasks, eliminating the need for customers to wait in a queue to speak with a human.”

Nick Manning

Director, Consumer Products, Golden State Warriors

Use an AI agent to:

Troubleshoot a product issue with a customer

Objective

Help a customer resolve a common product issue and achieve a positive resolution.

Action

An AI agent can locate knowledge base articles, show recent support tickets, warranty information, and recommend the top troubleshooting tips.

Try this prompt

With Google Cloud, businesses saw:

207% three-year ROI from using Customer Engagement Suite with Google AI

120 seconds saved per contact in the first year, increasing to 130 seconds by the third year

$2M increase in additional revenue in the first year, doubling to $4M by the third year, from better routing and information

Forrester. (2025). The Total Economic Impact™ Of Google Cloud Customer Engagement Suite With Google AI. A commissioned study conducted by Forrester Consulting on behalf of Google. Results are for a composite organization representative of interviewed customers.

> “People do not want to be rushed when it comes to their health. AI agents are the solution for the time crunch providers face today. Bonus when the AI agents are empathic and personable.”

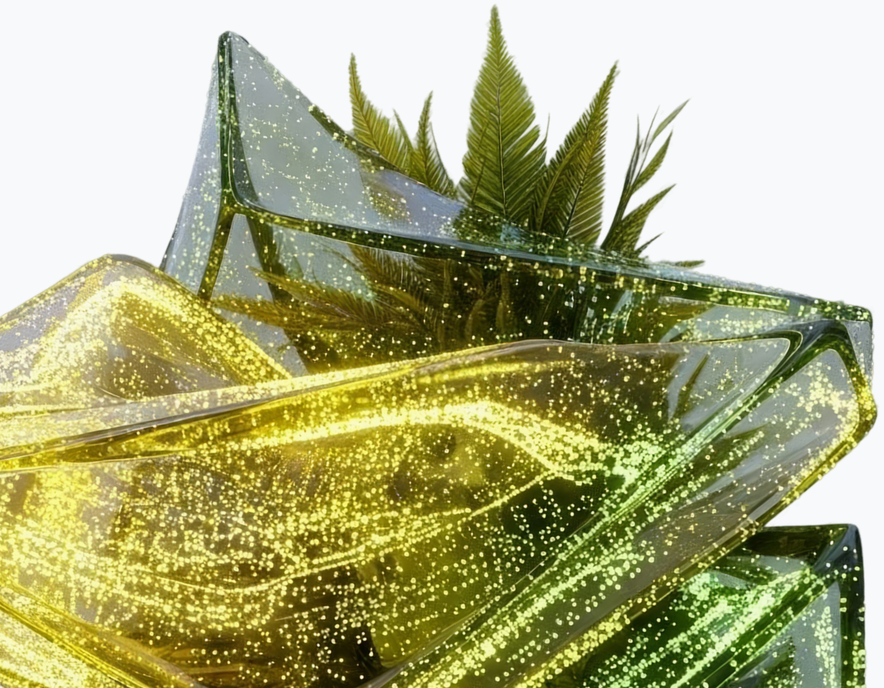
Leeza Constantoulakis
Chief Nursing Officer, Drive Health

Drive Health

Fueling your business growth

Revenue growth is markedly higher within organizations that leverage AI in production.

56% report business growth due to gen AI (vs. 63% in 2024)[33]



Revenue growth from gen AI

	2024	2025
Increased overall annual revenue between 1–5%	14%	15%
Increased overall annual revenue between 6–10%	52%	53%
Increased overall annual revenue of more than 10%	34%	31%

Executives reporting increased revenue with gen AI solutions: 2024: n=678, 2025: n=1387; Question text: (1) In what ways did your company experience business growth as a direct result of gen AI? Please select all that apply. (2) Based on your past/existing gen AI initiatives, how much did gen AI directly increase overall annual company revenue? Your best estimate is fine.

[33] Total (global): 2024: n=1539, 2025: n=3466; Question text: In which of the following areas have your gen AI solutions created meaningful impact? Please select all that apply.

$1.4M

in additional net revenue achieved, on average, by Google Cloud customers[34]

IDC White Paper, sponsored by Google Cloud, The Business Value of Google Cloud Generative AI, IDC #US53278925, July 2025

[34] IDC's study calculated the aggregate impact of Google Cloud gen AI use cases on revenue. The most significant gen AI use case at interviewed organizations enabled organizations to recognize $9,178,571 in additional gross revenue per year. For purposes of IDC's financial model, a 15% operating margin assumption was applied, resulting in annual net revenue gains of $1,376,786 per organization in the financial model.

Use an AI agent to:

Optimize stock for a slow-moving product

Objective

Identify a slow-moving product and take action to improve sales or manage inventory.

Action

An AI agent can show sales data and current inventory levels, analyze and compare trends, then suggest a targeted clearance promotion or adjust stock ordering levels.

Try this prompt

Smarter, nimbler marketing

Implementing AI in marketing workflows enables more effective and efficient campaigns, drives more leads, and increases conversion.

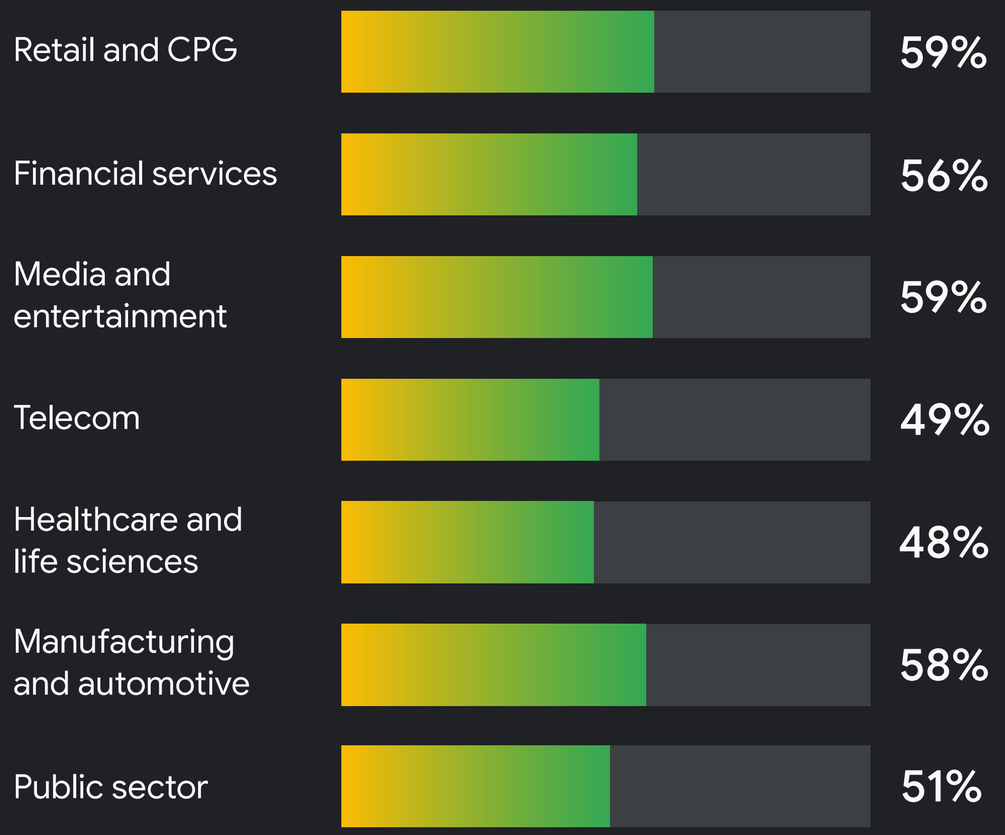
Key areas where AI is driving ROI now

55% report gen AI has resulted in meaningful impact on marketing, helping to create campaigns and increase leads and conversion[35]

33% saw ROI on gen AI use cases for sales and marketing (field sales activities, marketing operations, and content creation), unchanged YoY[36]

[35] Total (global): n=3466; Question text: In which of the following areas have your gen AI solutions created meaningful impact? Please select all that apply.
[36] Executives whose organization is currently using or planning to use gen AI for sales and marketing: 2024: n=1454, 2025: n=3245; Question text: In what timeframe do you expect gen AI to deliver return on investment (ROI) to the following areas of your business?

Improved marketing from gen AI across industries



Total (global): n=3466, Retail and CPG: n=585, Financial services: n=556, Media and entertainment: n=471, Telecommunications: n=489, Healthcare and life sciences: n=597, Manufacturing and automotive: n=517, Public sector: n=251; Question text: In which of the following areas have your gen AI solutions created meaningful impact? Please select all that apply.

Use an AI agent to:

Conduct competitor research for a new market segment

Objective

Understand competitor strategies and draft an analysis.

Action

Use Google's Deep Research agent to research competitors' recent marketing campaigns and social media presence, draft an analysis report and identify potential differentiation opportunities.

Try this prompt

With Google Cloud, businesses saw:

32% quicker content editing

42% faster than commercially available gen AI to replicate tone of voice creation

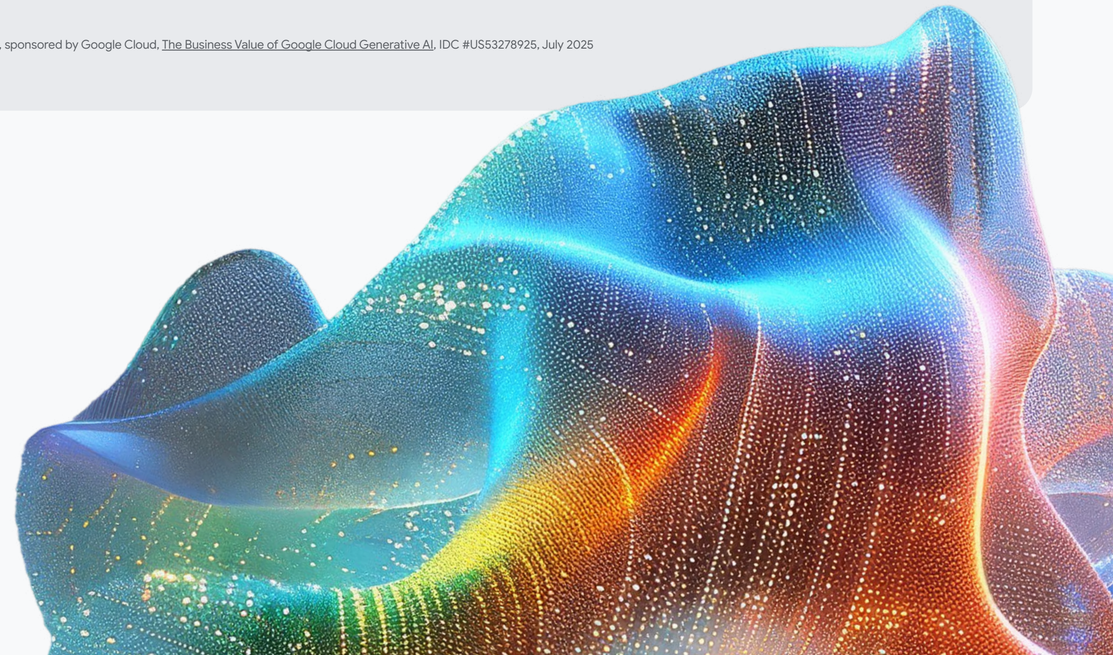
46% quicker content creation

IDC White Paper, sponsored by Google Cloud, The Business Value of Google Cloud Generative AI, IDC #US53278925, July 2025

"I can't think of a better technology to reimagine content creation and personalization workflows than AI."

Ian Hargreaves
Data Science Fellow, ATB Financial

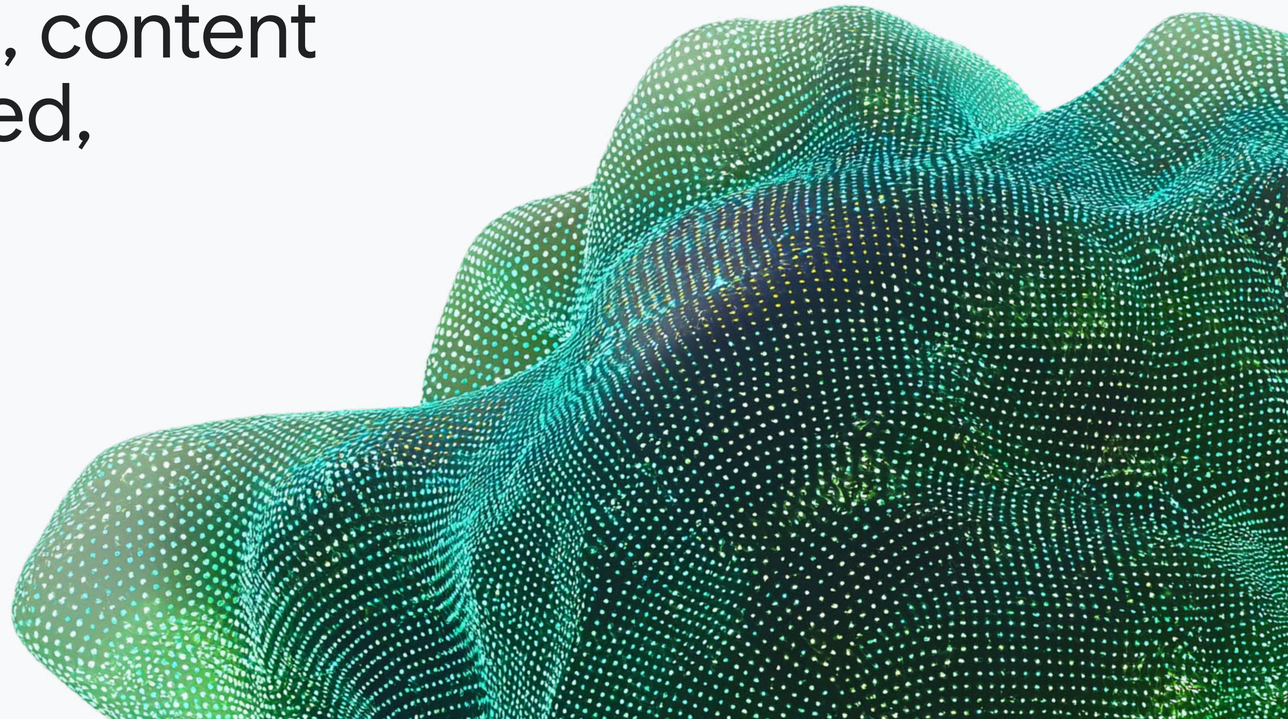
ATB



Seattle Children's
HOSPITAL • RESEARCH • FOUNDATION

“Gen AI excels at marketing-related tasks that require extracting data from a large database, such as audience building, journey orchestration, content creation, and designing targeted, personalized campaigns.”

Zafar Chaudry
Chief Digital Officer & Chief AI and Information Officer,
Seattle Children's Hospital



Proactive enterprise security

AI threat detection and response can enhance security posture, especially against emerging threats.

49% report gen AI has resulted in meaningful impact to security posture[37]

Improved security posture from gen AI

77% (-5% YoY) improved ability to identify threats

74% (new to 2025) improved intelligence and response integration

61% (-10% YoY) reduction in time to resolution

53% (-12% YoY) reduction in number of security tickets

Executives reporting improved security posture with gen AI solutions: 2024: n=863, 2025: n=1711; Question text: Based on your past/existing gen AI initiatives, how did gen AI directly improve your company's security posture? Please select all that apply.

[37] Total (global): 2025: n=3466; Question text: In which of the following areas have your gen AI solutions created meaningful impact? Please select all that apply.

Use an AI agent to:

Respond to a critical security vulnerability

Objective

Quickly assess a reported security vulnerability, coordinate a fix, and communicate with stakeholders.

Action

The agent gathers vulnerability reports, current security states, and pentest results. After assessing the issue's severity, the agent drafts a report and creates support tickets to implement a fix.

Try this prompt

With Google Cloud, businesses saw:

$1.2M saved over three years by providing a predictable cost model and enabling the decommissioning of legacy on-prem security tools

70% reduction in the risk and cost of a breach

50% faster mean time to respond and 65% faster in mean time to investigate for SecOps teams

Forrester. (2025). The Total Economic Impact (TEI) of Google SecOps. The Total Economic Impact(TM) Of Google SecOps, a commissioned study conducted by Forrester Consulting on behalf of Google. Results are based on a composite organization representative of interviewed customers over three years.

> "Security is the perfect use case for gen AI. It can hunt down threats and even remediate them around the clock."

Zafar Chaudry
Chief Digital Officer & Chief AI and Information Officer, Seattle Children's Hospital

Seattle Children's
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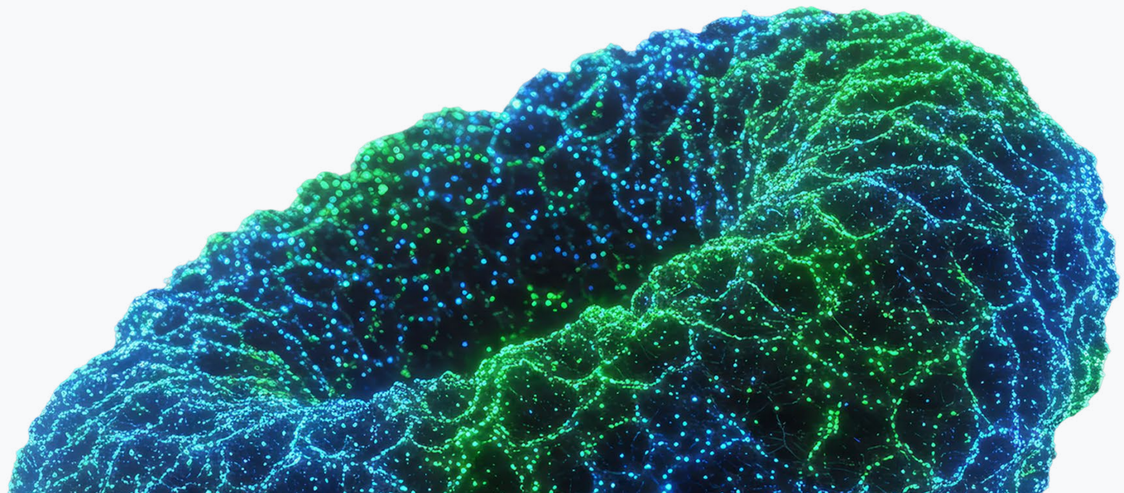


03

Investment trends for an AI-ready future

The maturation of AI is also reflected in a shift in its funding.

Businesses are revising their priorities to align with the AI-first future—investment is growing, and a higher portion of AI budgets is being aimed at AI agent deployment.

> AI technology is evolving quickly. A year ago, very few people were talking about AI agents and agentic AI at the enterprise level. With agentic AI as a positive disruptive force for our industry, we have to rethink processes for people and AI consumption—prioritizing agentic AI is about setting ourselves up for the future."

Cristina Nitulescu
Head of Digital Transformation and IT, Bayer Consumer Health

Top 5 business objectives within the next 2-3 years

Total (global): 2024: n=1539, 2025: n=3466; Question text: In light of recently completed gen AI initiatives, which of the following business objectives are you planning to pursue with gen AI within the next 2-3 years? Please select all that apply.

Overall AI spending is rising

AI is now a mission-critical enterprise investment—evidenced by two clear trends.

As technology costs fall, overall spending is rising. These new investments are increasingly funded by reallocating capital from non-AI budgets,[38] in addition to 26% mean percent of total annual IT spend already allocated for AI.[39]

77% report their organization's gen AI spend has increased as technology costs fall (not fielded in 2024)[40]

58% report their organization is allocating net new budget (without reducing other budgets) to fund gen AI investments (vs. 61% in 2024)[41]

48% are reallocating non-AI budget to fund gen AI investments (vs. 44% in 2024)[42]

[38] Total (global): 2024: n=1539, 2025: n=3466; Question text: What is your approach to funding gen AI? Please select all that apply.
[39] Total (global): 3315; Question text: What percent % of your total annual IT spend is allocated for AI? AI expenses would include Talent, AI Software Licenses, AI Hardware & Infrastructure, AI Application Development. Please exclude data & BI analytics that are not directly using AI or ML. Your best estimate is fine.
[40] Total (global): n=3466; Question text: Did the decreasing costs of AI technology (model training and operating) change your spending on gen AI?
[41] Total (global): 2024: n=1539, 2025: n=3466; Question text: What is your approach to funding gen AI? Please select all that apply.
[42] Total (global): 2024: n=1539, 2025: n=3466; Question text: What is your approach to funding gen AI? Please select all that apply.

Top investment areas to accelerate AI adoption

Total (global): 2025: n=3466; Question text: Which of the following are the top 3 areas of investment to accelerate gen AI adoption within your organization? Please select the top 3 areas of investment for your organization.

COMMERZBANK

"At Commerzbank we prioritize AI use cases that promise the greatest ROI, enabling us to unlock significant cost savings."

Oliver Dörler
Chief Data and AI Officer, Commerzbank

ROI continues to need C-suite sponsorship

The biggest returns come when AI is aligned to clear business goals.

The formalization of AI strategy is most evident in the stability and strength of executive sponsorship.

Similar to last year's findings, C-suite sponsorship remains crucial for successful AI adoption. Executives who report their organization has comprehensive executive alignment are consistently more likely to see a tangible ROI from their AI initiatives.[43]

[43] Executives who report their organization has comprehensive C-level sponsorship and clear corporate vision for gen AI objectives: 2024: n=540, 2025: n=1269; Question text: In what timeframe do you expect gen AI to deliver return on investment (ROI) to the following areas of your business?

"Leaders need to first decide what ROI means. It goes beyond financial returns. We have to ask if it's making people more efficient and building towards business objectives—really clearly define what we're trying to achieve."

Eric Lambert
Vice President, Legal and Employment Counsel, Trimble

78% of executives who report their organization has C-level sponsorship report seeing ROI now on at least one gen AI use case in 2025[44]

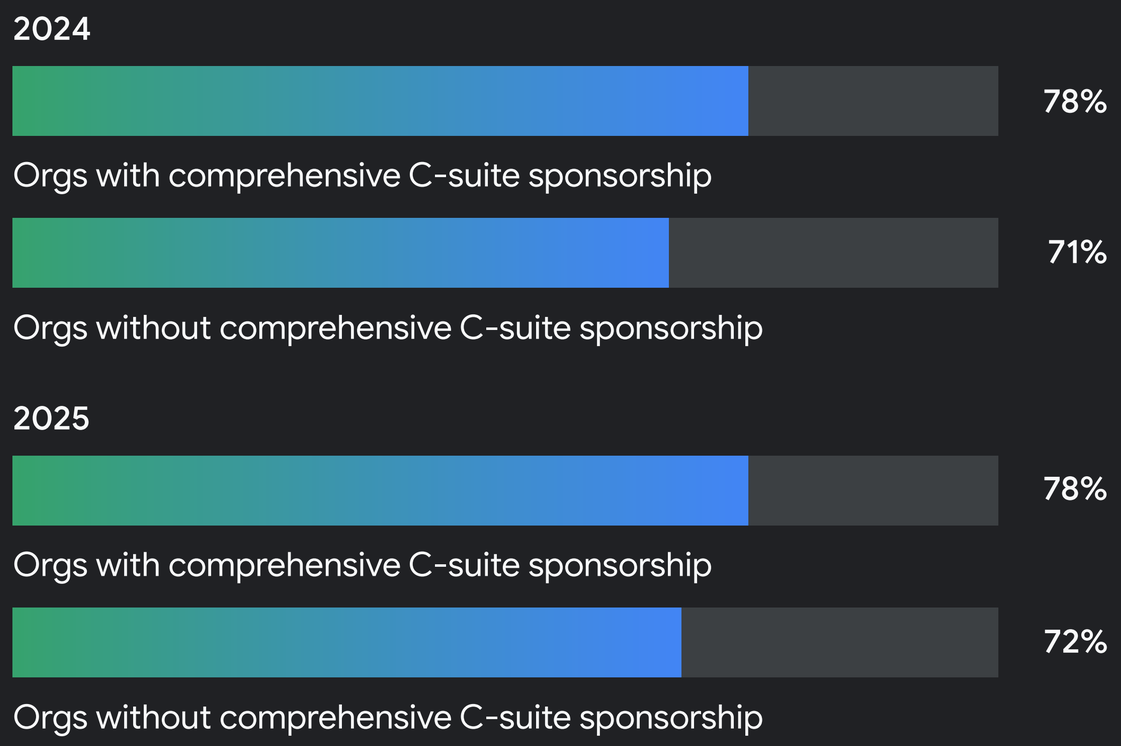
> “C-level sponsorship is essential when rolling out any new technology. Leadership needs to understand what it is, how it works, and the impact it can have in order to secure the right resources and budget for success.”

Anaterra Oliveira
Vice President of Technology, Dasa

Even more telling is the significant increase in strong alignment between gen AI adoption and C-suite level sponsorship—which grew from 69% in 2024 to 73% in 2025.*[45]

* Strong alignment indicates selecting either a 4 or 5 to the question “How is gen AI adoption connected to your organization’s business goals?”, with a 5 indicating “Comprehensive C-level sponsorship and clear corporate vision for gen AI objectives.”

C-level sponsorship strongly correlates with seeing ROI on gen AI



Executives who report their organization has comprehensive C-level sponsorship and clear corporate vision for gen AI objectives; Total (global) 2024: n=540, 2025: n=1269; Executives who do not report their organization has comprehensive C-level sponsorship and clear corporate vision for gen AI objectives; Total (global) 2024: n=999, 2025: n=2197; Question text: In what timeframe do you expect gen AI to deliver return on investment (ROI) to the following areas of your business?

[44] Executives who report their organization has comprehensive C-level sponsorship and clear corporate vision for gen AI objectives: n=1269; Question text: In what timeframe do you expect gen AI to deliver return on investment (ROI) to the following areas of your business?
[45] Total (global): 2024: n=1539, 2025: n=3466; Question text: How is gen AI adoption connected to your organization’s business goals? Please select the answer choice that most closely represents your organization.

Key challenges to consider

For many organizations, the top challenges with AI are rooted in the foundational work required to support them.

Overcoming the complexities of systems integration and meeting the high standards for data security represent the most significant hurdles. The solution lies in adopting a modern, integrated data strategy that prioritizes strong governance and security protocols from the start. This approach ensures that data is both accessible for innovation and secure throughout the entire AI lifecycle.

Over 1 in 3

indicate that data privacy and security is a top consideration for LLM providers[46]

Deutsche Bank

"While everyone believes in their value, deploying AI agents while covering enterprise security, compliance and other requirements is still tremendously difficult."

Christoph Rabenseifner
Chief Strategy and Innovation Officer TDI and Head of Corporate VC Group, Deutsche Bank

[46] Total (global): n=3466; Question text: Which of the following factors are MOST important to your company when considering LLM providers? Please select the top three.

“

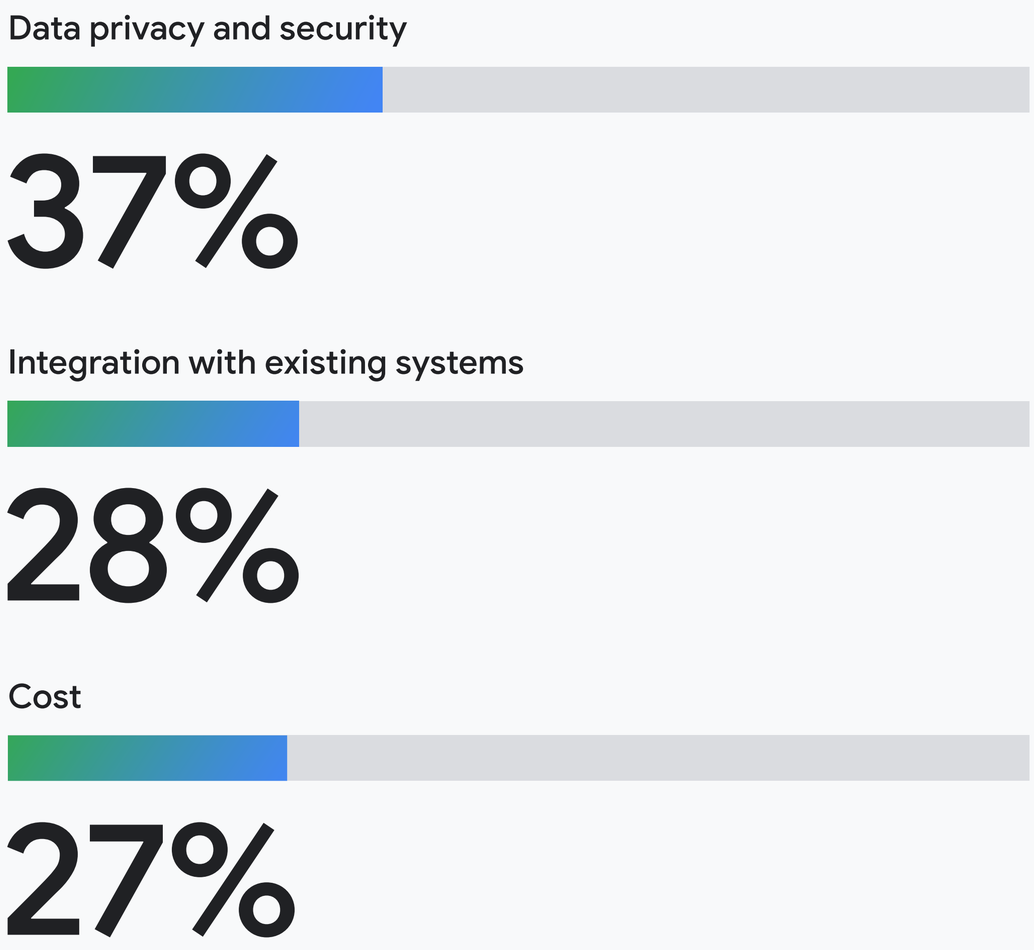
Alaska AIRLINES

The biggest security concern with LLMs is the risk of bad actors getting access to your data, or the LLM hallucinating or changing it. The risk is you lose the true view of your data, then it becomes a vicious cycle.”

Natalie Bowman

Managing Director, Product & Experience Design, Alaska Airlines

Top 3 factors in considering LLM providers

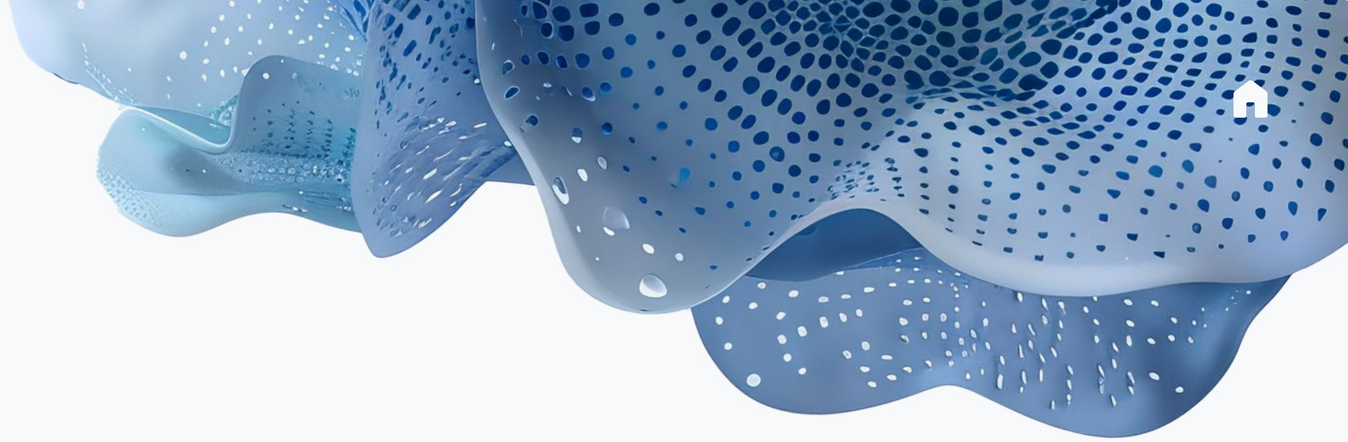


Total (global): n=3466; Question text: Which of the following factors are MOST important to your company when considering LLM providers? Please select the top three.

04

Your next steps

The AI agent ROI checklist



- **Find your executive champions.** Cultivate C-suite sponsorship to advocate for AI initiatives, clear roadblocks, and align to results.
- **Demonstrate value to secure AI budget.** Build a compelling business case for why AI deserves its own investment.
- **Create your AI rulebook now, not later.** As AI use grows, so do the risks. Establish clear, enterprise-wide guidelines to secure your data, protect IP, and ensure compliance as you scale.
- **Start with the biggest wins.** Not all AI projects are created equal. Focus your energy on building AI agents that can automate repeatable tasks to deliver clear ROI.
- **Build trust in AI from day one.** First, get your data house in order with a robust data governance and enterprise security framework. Second, always keep a human-in-the-loop.
- **Give your AI agents the tools to be useful.** For an AI agent to do the work, it needs access to your internal enterprise systems, like your CRM or Drive. Grant it secure, governed access.
- **Invest in your talent and internal AI education programs.** The most successful companies don't just buy technology, they build skills.

Google Cloud

Ready to see ROI from AI?

BRILYANT

Take the next step

Ready to see how Brilyant and Google Cloud can transform your business? Our team can help you explore solutions tailored to your specific needs and guide you through implementation. Let's discuss how you can leverage Google Cloud's powerful tools to improve efficiency, drive innovation, and achieve your business goals.

Contact us today for a personalized consultation and discover how we can help you unlock new possibilities with Google Cloud.

We're here to help you every step of the way.

Sincerely,

Brilyant IT Solutions

Google Cloud
Partner