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From token-maxxing to ROI

A reality check for enterprise AI.

Tokenmaxxing and model leaderboards grab headlines, but our conversations with organizations show what people are really looking for is token efficiency while achieving consistent outcomes.

Enterprise AI rapidly went from pilot to production to value. Now organizations are measuring AI’s value against its costs.

The AI era faces its newest “What’s the ROI?” moment.

In the early days, we were all asking **if** there was ROI from AI. Our latest research shows that 86%* of executives agree that AI drives cost-efficient growth. Now executives are asking for more insights into **where** and **how** AI is driving the most ROI across businesses. Platform choices are key to token efficiency and total cost.

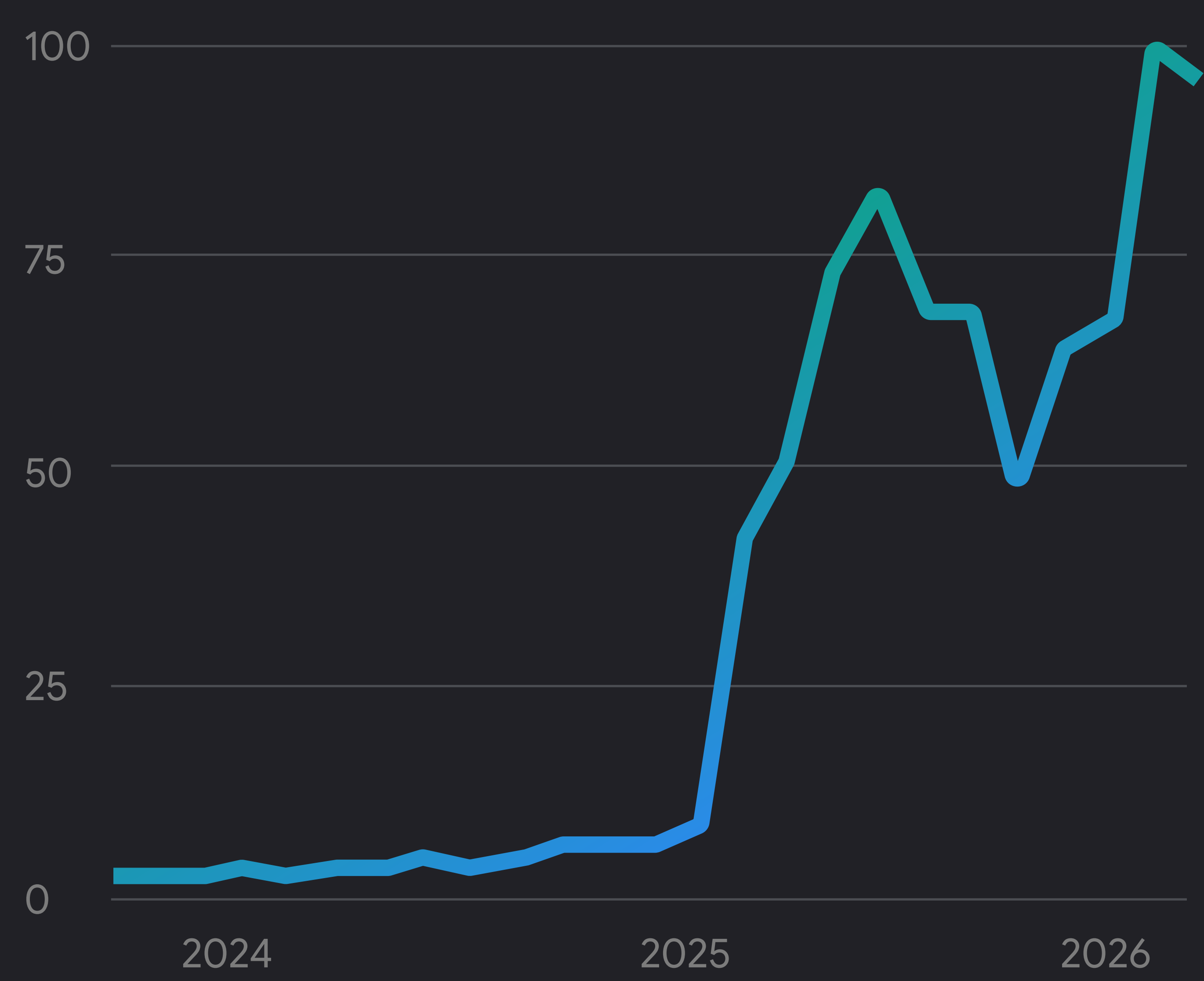
Let’s find out who is gaining the most ROI from AI, how they’re doing it, and strategies that you can follow.

Oliver Parker

VP of AI, Google Cloud

Here’s how >2,400 senior executives get more value from AI (and 3 strategies that you can follow).

Interactive report →



Trends for “AI ROI” on Google Search, Google Trends Worldwide Data (Jan 2024 to April 2026)

*Question: To what extent do you agree or disagree with the following statement? AI has enabled us to scale revenue or output without proportional increases in operating costs. N=2,403

What are people searching for?

In April 2026, searches for “AI ROI” officially overtook YouTube searches for “how to use AI” for the first time.

Dec ’22

“How to use AI” searches jumped 160% in one month on Google Search.

Jan ’24

Searches for “gen AI” increased 800% in 12 months on Google Search.

Aug ’25

“AI ROI” searches skyrocketed 1,400% in 12 months on Google Search.

Apr ’26

Searches for “AI ROI” overtook “how to use AI” on YouTube for the first time.

Jun ’26

“Token efficiency” searches rose 335% in the first half of 2026 on Google Search after token-maxxing became mainstream.

Today

86% of executives agree that AI drives cost-efficient growth.

This raises a few questions

01

Who is gaining the most ROI from AI?

02

How is AI driving ROI?

03

Where is ROI showing up?

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Our process

To answer these questions, we partnered with National Research Group to survey 2,403 executives across the globe.

Using **Gemini Enterprise**, **Google Antigravity**, and **Gemini Deep Research**, we analyzed 297,782 question responses. We evaluated the data across four key dimensions: industry, geography, company size, and AI adoption stage.

We supplemented this with publicly available data from **Google Search Trends** and **YouTube Trends**, as well as qualitative data from **Google Cloud customers**.

Let's dive in.

The result

Our 2026 report on the ROI of AI

2,403
executives surveyed

297,782
data points

- Gemini Enterprise
- Gemini Deep Research
- Google Antigravity
- YouTube Trends
- Google Search Trends

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3 things AI ROI Leaders are doing differently

Who is gaining the most ROI from AI?

Our survey found a 26% cohort of enterprises whose financial returns from AI initiatives are actively “accelerating” year-over-year. We classified this group as the **AI ROI Leaders.**

26%
AI ROI Leaders with accelerating AI returns

<1%
Declining

58%
Steadily increasing AI returns

16%
Inconsistent/plateauing/ too early to tell

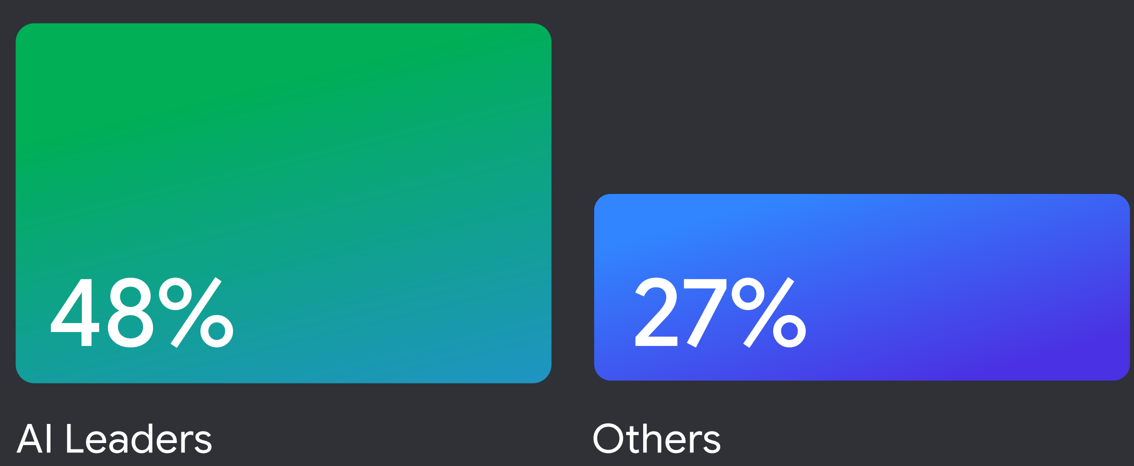
AI ROI Leaders
Others

Question: Compared to 12 months ago, the overall financial returns from AI initiatives are? N=2,403

Here’s how they set themselves apart

01 They make decisions faster

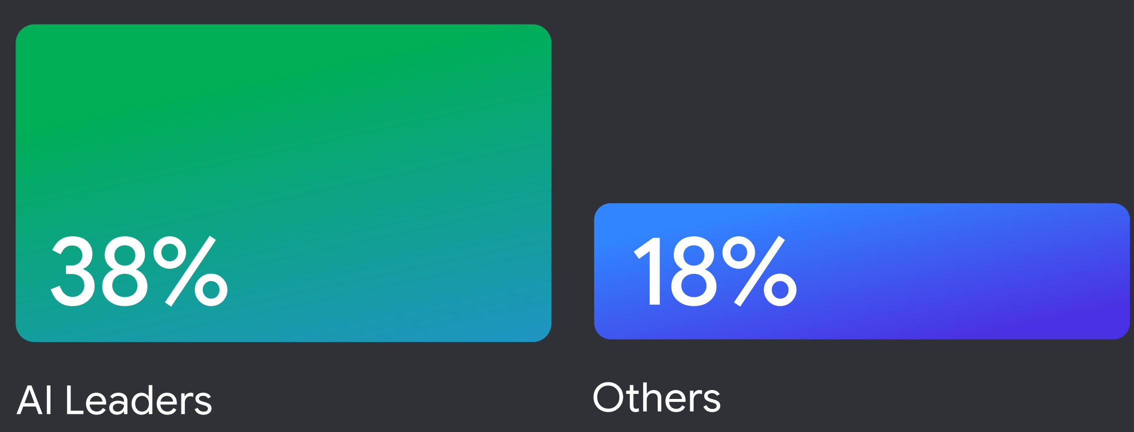
48% of AI ROI Leaders describe the ownership and decision-making authority for AI agent initiatives as “extremely clear,” while only 27% of other organizations can say the same.



Question: How clear is ownership and decision-making authority for AI agent initiatives in your organization? N=2,001

02 They mandate AI fluency

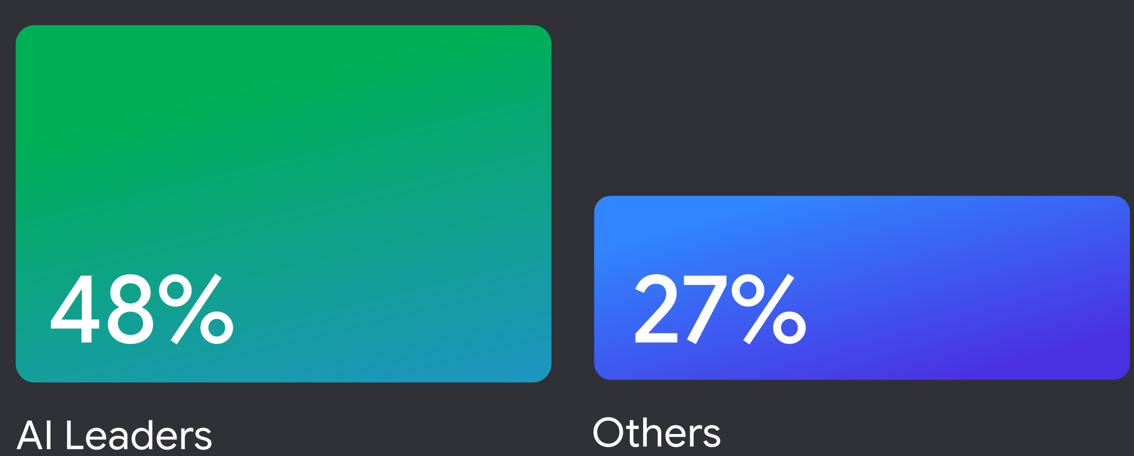
38% of AI ROI Leaders have “comprehensive, ongoing AI capability development embedded into roles with required training,” compared to just 18% of peers.



Question: How would you describe your organization’s investment in AI training and upskilling for employees? N=2,403

03 They embed AI into core business processes

48% of AI ROI Leaders say they have “embedded AI into core business processes and revenue streams” or “AI is enabling new business models or revenue opportunities,” compared to 27% of other organizations.



Question: Which best describes your organization’s current stage of AI value creation? N=2,403

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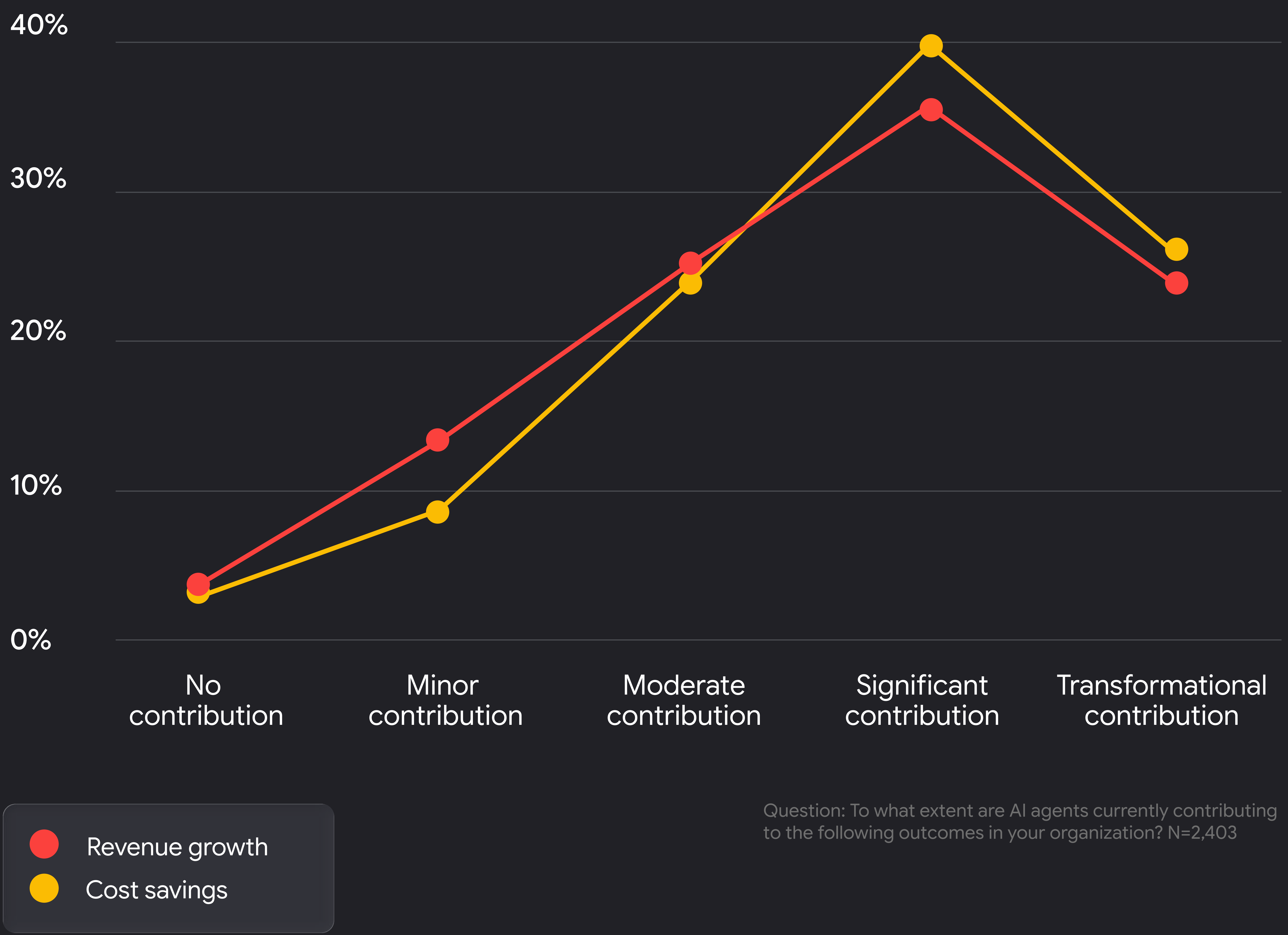
How is AI driving ROI?

In one word: agents.

94% of respondents report AI agents contribute to both cost savings and revenue



Question: To what extent are AI agents currently contributing to the following outcomes in your organization? N=2,403

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Top 10 enablers for scaling AI

Respondents cite improved security and compliance as the #1 enabler to scaling AI

Unified enterprise platforms often address these needs inherently, while controlling the costs associated with deploying, managing, and scaling AI initiatives.

Question: Which of the following capabilities or decisions most enabled your organization to successfully scale AI initiatives from pilot to production and deliver measurable business value? N=2,001

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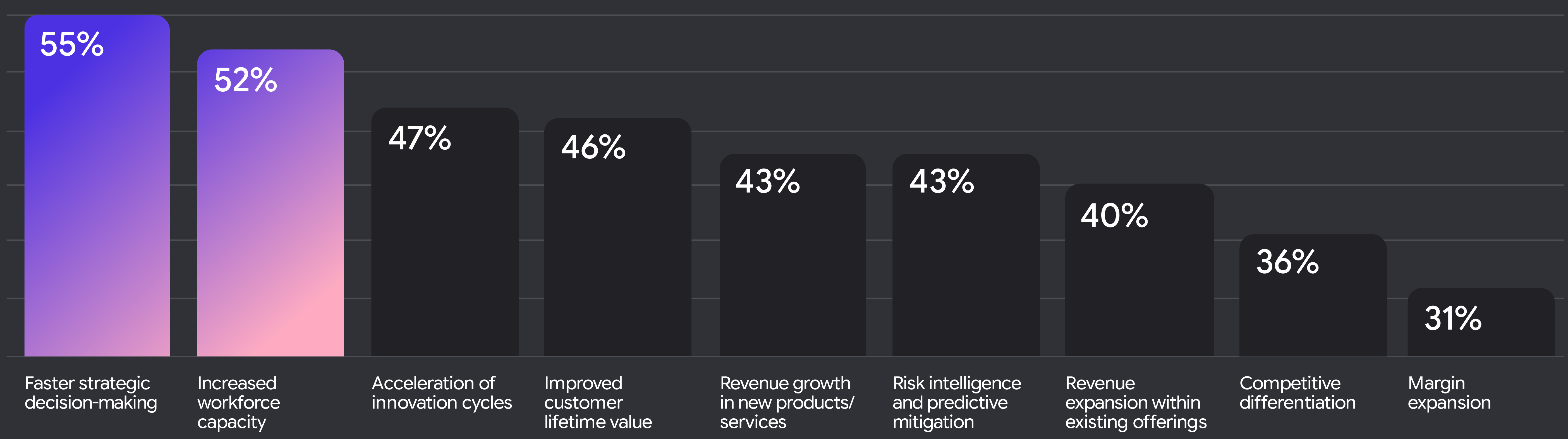
Where is ROI showing up?

ROI moves beyond productivity

Faster decision-making has surpassed increased productivity as the top-cited measurable outcome driven by AI investments.



Question: Which outcomes is AI measurably advancing in your organization? N=2,403

ROI scorecard

When asked to indicate how they measure AI initiatives, respondents rely on the following 5 methods:

- **36%** Operational performance improvements
- **21%** Direct financial outcomes
- **18%** Strategic business KPIs
- **13%** Time-to-value or speed of return on AI investments
- **12%** Formal AI value-tracking framework or executive-level reporting

Question: How is success with AI primarily measured today in your organization? N=2,403

86% agree that AI strengthens data

Question: To what extent do you agree or disagree with the following statement? AI implementation has strengthened our proprietary data advantage relative to competitors. N=2,403

53% report that AI has already caused a significant or transformational change to their organization's operating model

Question: To what extent has AI changed your organization's operating model or the way you run the business? N=2,403

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How companies are driving the ROI of AI

Retail

Best Buy uses Gemini Enterprise Agent Platform to condense thousands of product reviews into concise insights that help customers make informed buying decisions.

Learn more

Financial services

With Google Gemini for Enterprise, **PayPal** is building the intelligent, data-driven decisioning layer that powers smarter, more personalized customer experiences at scale.

Learn more

Manufacturing

Tata Steel is rapidly scaling autonomous capabilities across its vast global organization, successfully deploying a fleet of over 300 specialized AI agents in just nine months to drive efficiency and precision across its global operations.

Learn more

Healthcare

Highmark Health scaled employee impact with Sidekick, an AI assistant that has delivered $27.9 million in value in 2025 alone by automating research protocols and providing "AI search proxies" for internal teams.

Learn more

Life sciences

Elanco is using Gemini Enterprise Agent Platform and Gemini models to implement a framework supporting critical business processes, such as pharmacovigilance and customer orders, resulting in an estimated ROI of $1.9 million since launching last year.

Learn more

Consumer packaged goods

Coca-Cola and **Footballco** use advanced image generation, cinematic video synthesis, and high-fidelity voice modeling–combined with human creativity–to deliver real-time, social-first entertainment at scale for their global content series to reach football fans during the world's biggest tournament.

Learn more

Wealth management

Citi Wealth is launching Citi Sky, an always-on AI-Powered member of the Citi Wealth team that brings Citi's global intelligence to clients' fingertips through the Citi app.

Learn more

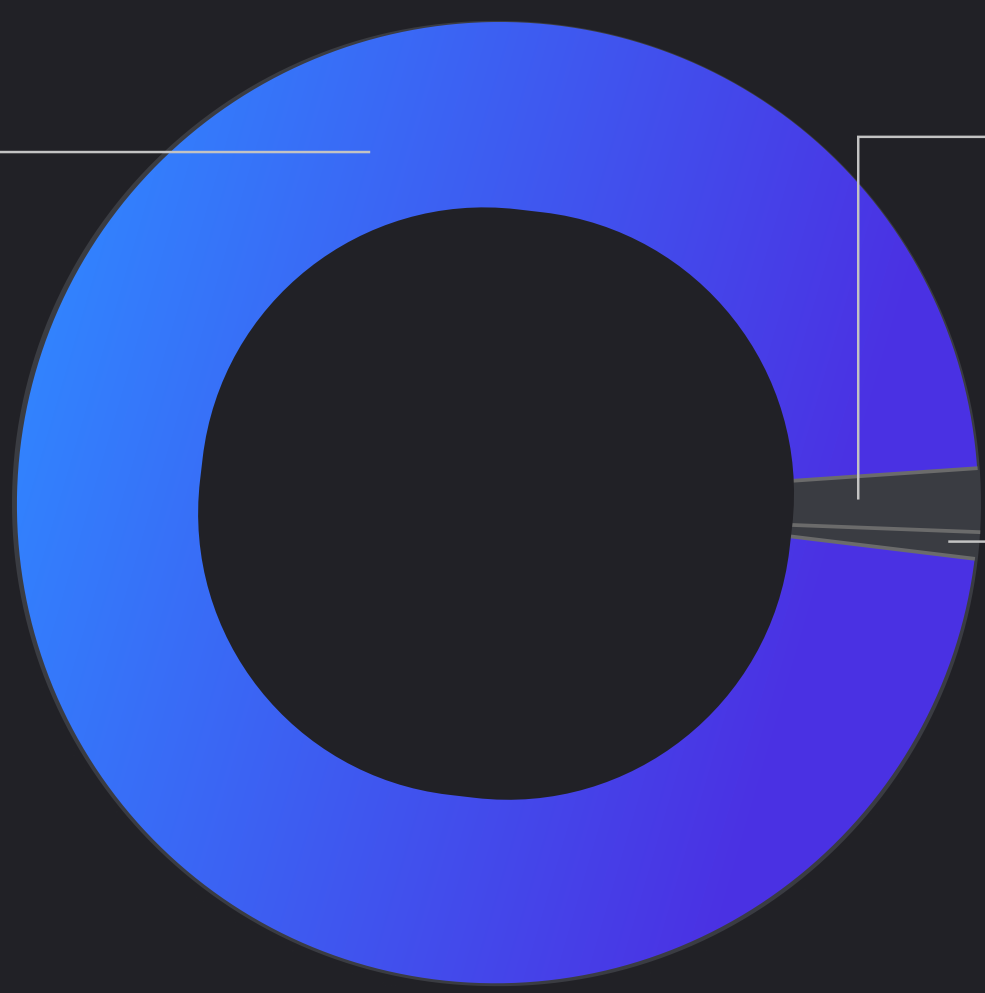
Future bets

Higher budgets, stronger strategy, and better ROI.

The biggest signal of ROI is continued investment

The data is clear: Organizations intend to continue investing in AI at higher rates.

97%
of respondents plan to increase AI spend next year



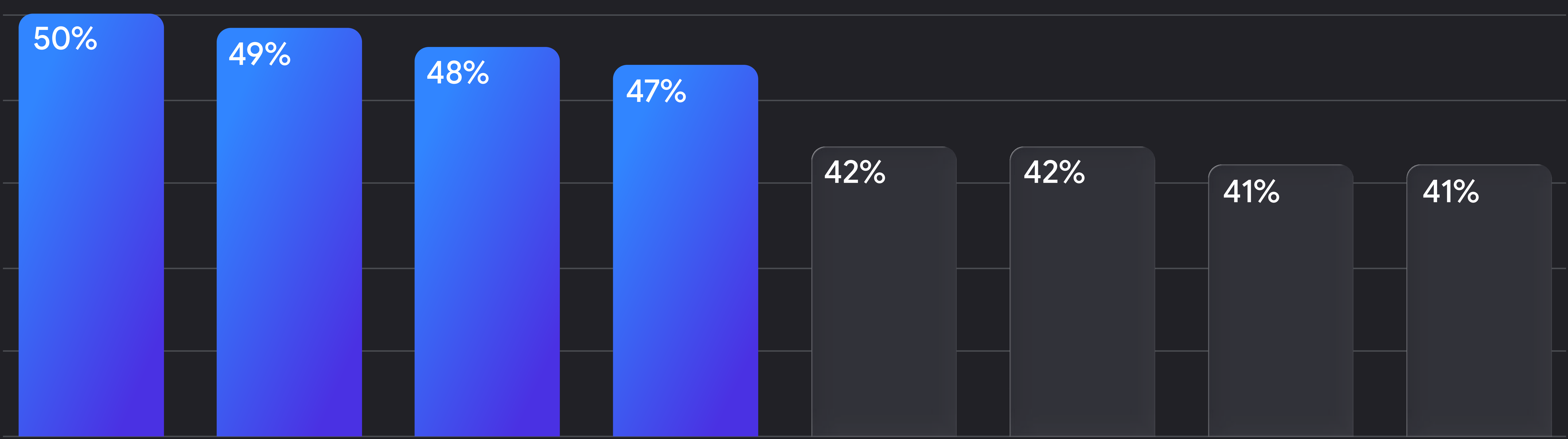
3%
plan to keep their spending flat

<0.1%
intend to decrease their AI investment YoY

Question: How does your organization's projected investment in AI for the next fiscal year compare to current spend? N=2,403

8 areas where AI investments are expected to deliver the greatest returns

It's all about AI-powered analytics, workflow automation, customer experiences, and AI infrastructure.



AI-powered analytics and decision intelligence

AI-powered workflow automation within existing systems

Customer-facing AI experiences (e.g., service, sales, commerce)

Data and infrastructure modernization to support AI at scale

Workforce enablement and AI capability development

AI-driven product or service innovation

Industry-specific solutions tailored to our sector

Autonomous AI agents embedded in end-to-end workflows

Question: Looking ahead, which AI investments do you expect to deliver the greatest financial returns over the next 12 months? N=2,403

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AI is everyone's job

While some were busy discussing AI trends, the AI ROI Leaders were hard at work getting more value from AI: speeding up decisions, growing revenue from new products or services, increasing productivity, and accelerating innovation. We learned three concrete behaviors that separate them:

1. Making faster decisions
2. Embedding AI into core business processes
3. Investing in AI fluency

These are strategies that you can follow, too.

We'd love to help you take the next step on your AI journey.

Oliver Parker
VP of AI, Google Cloud

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Contact sales