



The ROI of AI

in media and entertainment



How AI agents are helping captivate audiences.

Methodology

This report is based on a survey conducted by Google Cloud and National Research Group.

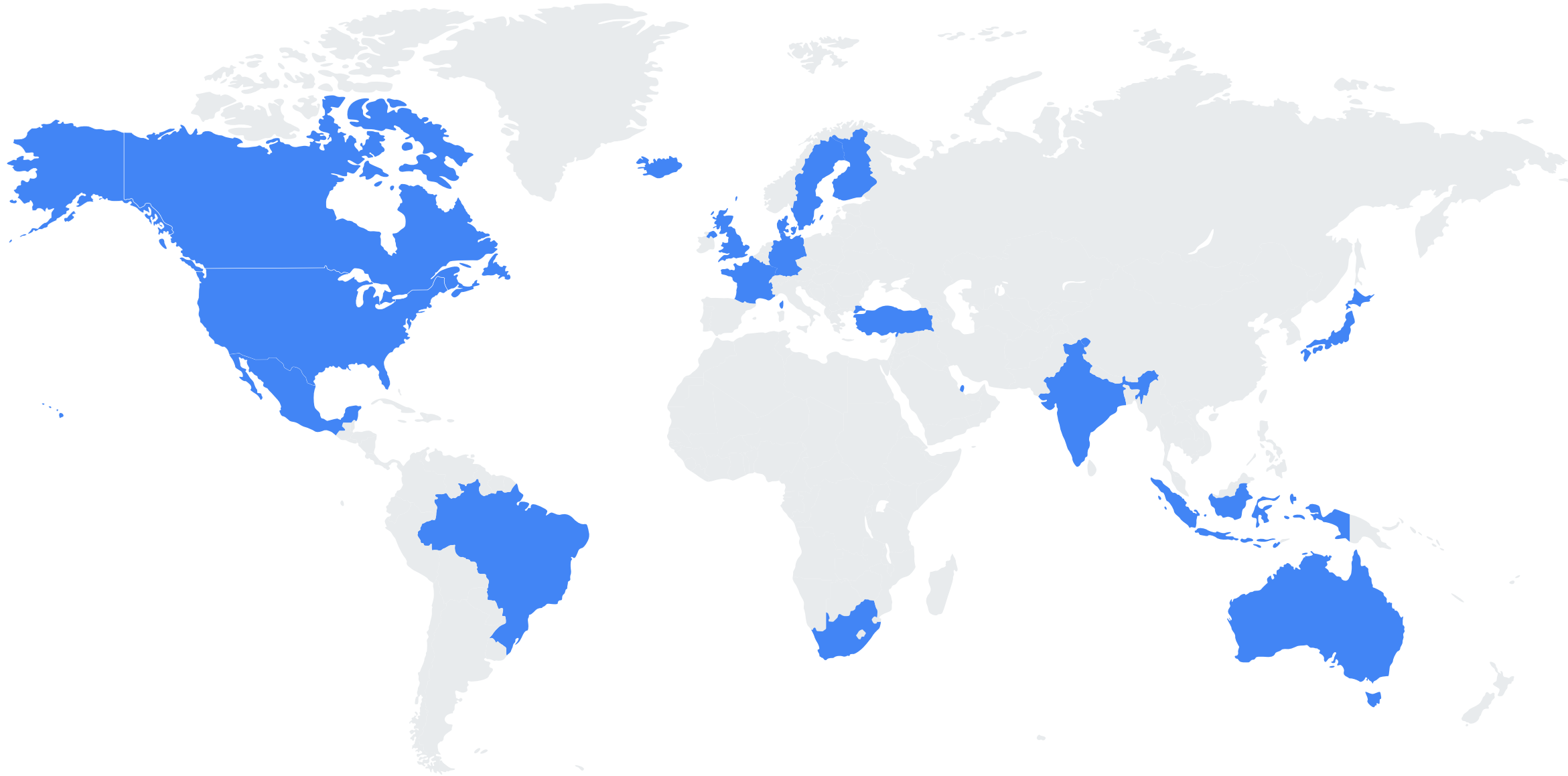
471 leaders of global media and entertainment companies:

- 128** CEO, CIO
- 136** CFO, CMO, CTO
- 106** CISO, CDO, CSO, COO, Director of Digital Strategy, VP of IT
- 101** 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	122	France	31	Australia	18	Brazil	42	South Africa*	1
Canada	29	Nordics	26	South Korea	20	Indonesia	17	UAE*	7
UK	29	Japan	20	Taiwan	16	Turkey*	6	Qatar*	3
Germany	24	India	14	Mexico	45	Kuwait*	1		

* Markets shown in aggregate as MEA region

Executive summary

Our second annual survey of senior leaders in media and entertainment reveals continued ROI from their generative AI initiatives, along with a new focus on agentic AI projects.

Historically, agentic systems have been difficult to implement, requiring laborious, rule-based programming or highly specific training of machine learning models. Gen AI changes that.

In fact, over half of executives are already leveraging AI agents. The use cases span a spectrum of complexity—from single-task agents to multi-agent systems that 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.

For the media and entertainment industry this trend marks a clear acceleration from planning to action, and using AI to captivate audiences across every touch point.



Albert Lai

Global Director, Strategic Industries,
Media & Entertainment, Google Cloud



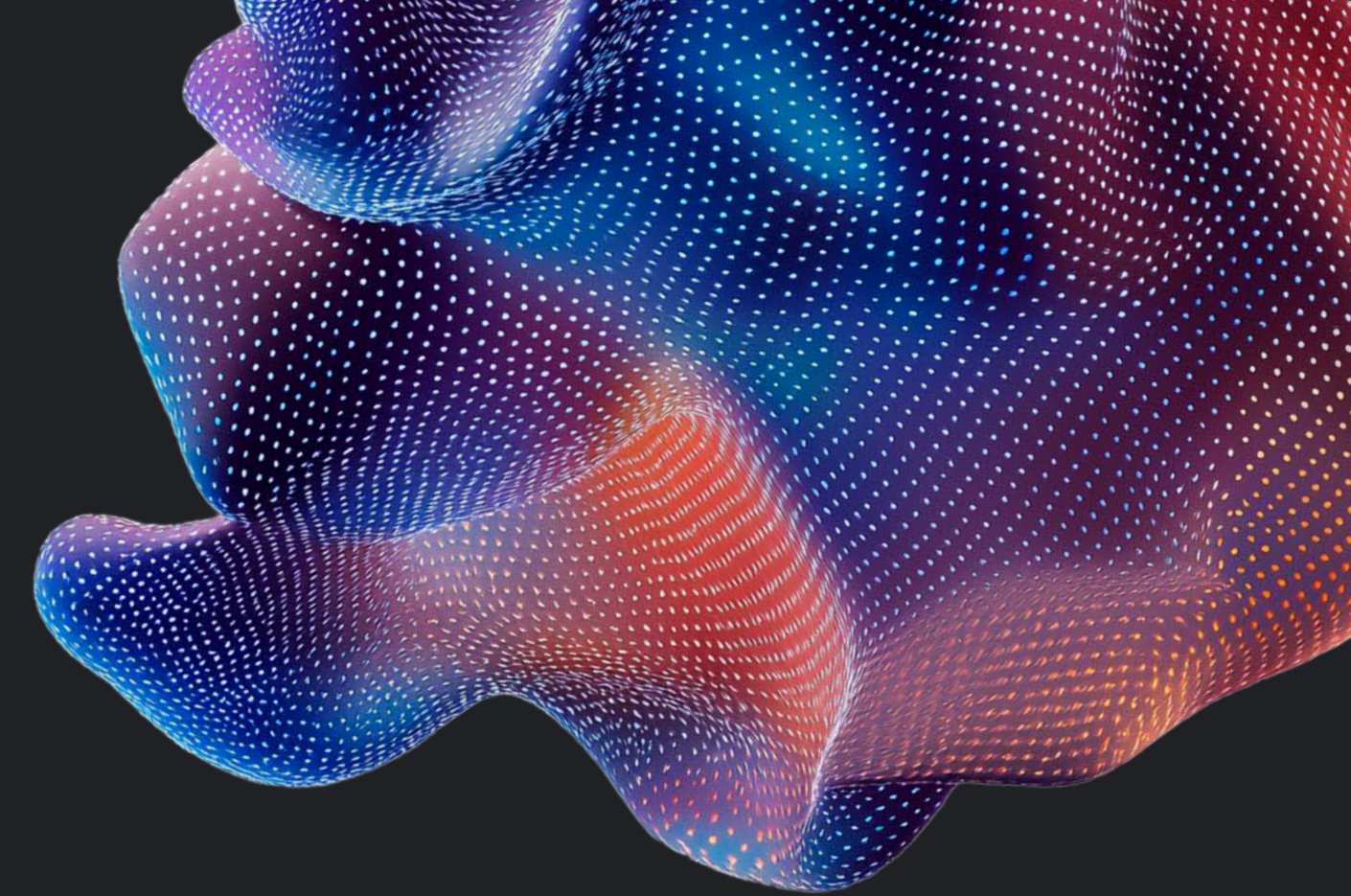
54%

of media and entertainment executives report their organizations are leveraging AI agents¹



* Unless otherwise noted, all statistics in this report are derived from the media and entertainment (M&E) executive survey and only include those who are using gen AI in production.
¹ M&E executives: n=471; Question: (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?

Key insights in media and entertainment



54%

of executives report their organization has adopted AI agents in production²

61%

of executives report their organization is allocating over 50% of their future AI budget to AI agents³

#1


concern for executives is data privacy and security when evaluating LLM providers⁴

² M&E executives: n=471; Question: (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 M&E executives: n=462; Question: What % of your future AI budget is being allocated to agents?

⁴ M&E executives: n=471; Question: Which of the following factors are MOST important to your company when considering LLM providers?

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01

The agentic shift

AI agents have arrived

The breadth of agentic AI adoption in the media and entertainment industry is striking.

Implementations range from gen AI-powered chatbots that answer questions, to single-task agents focused on a specific function like creative assistance, to sophisticated multi-agent systems that combine advanced AI models with access to tools so they can take actions on your behalf, under your control.



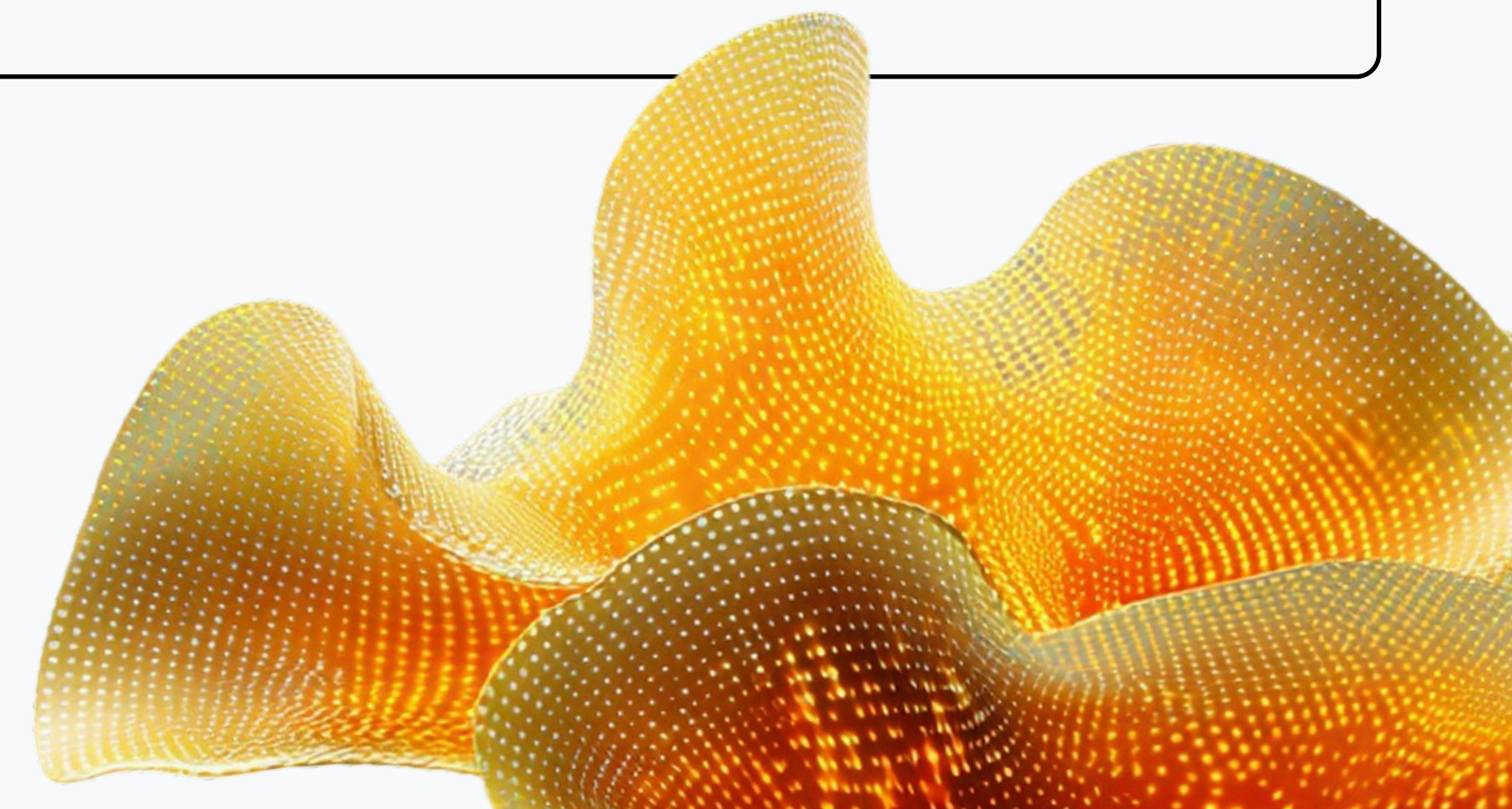
54%

of media and entertainment executives whose organizations use gen AI also have adopted AI agents in production⁵

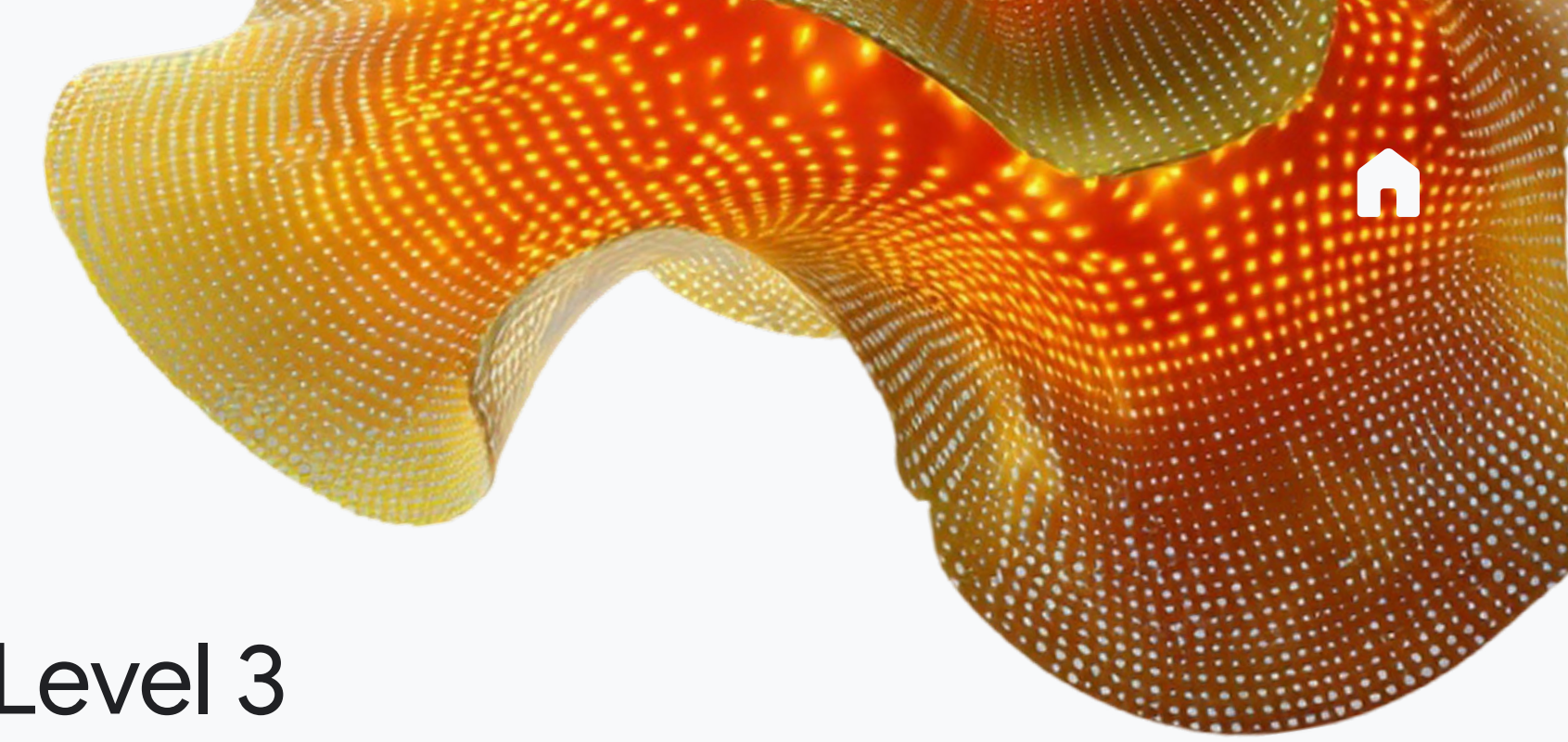
Definition of AI agents used in the survey

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.

⁵ M&E executives: n=471; Question: (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

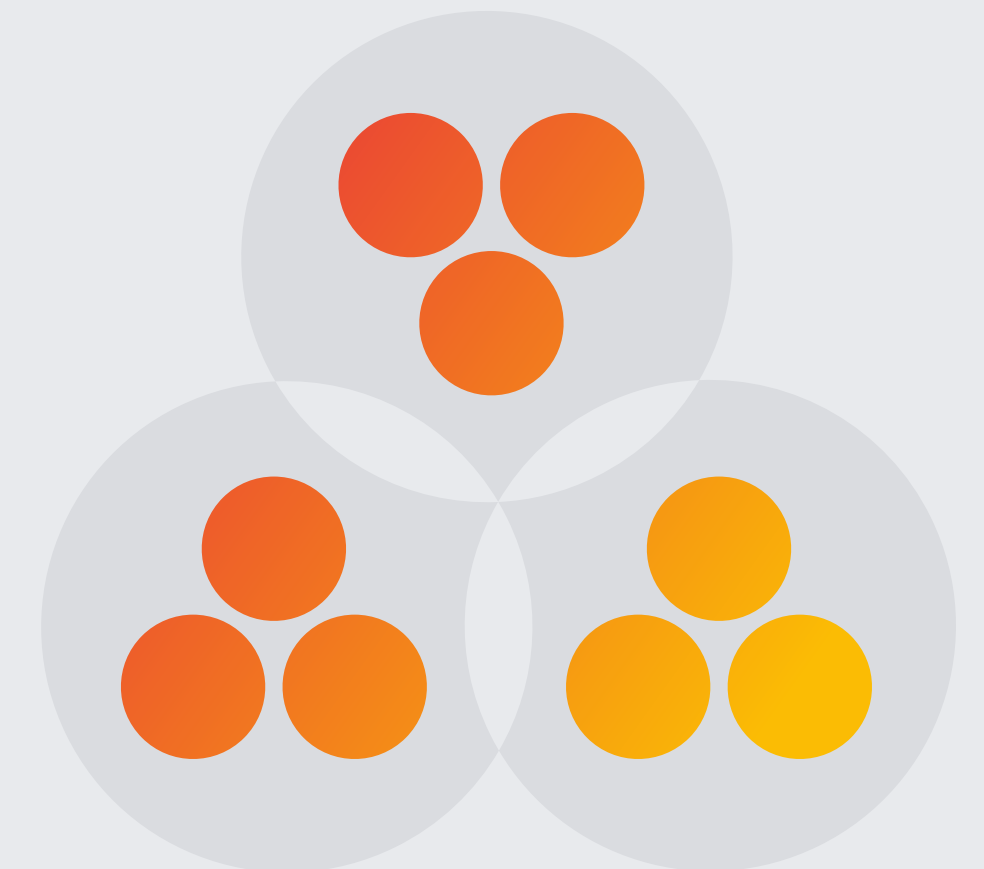
Creative agents



Level 3 Multi-agent workflows

Agentic workflows

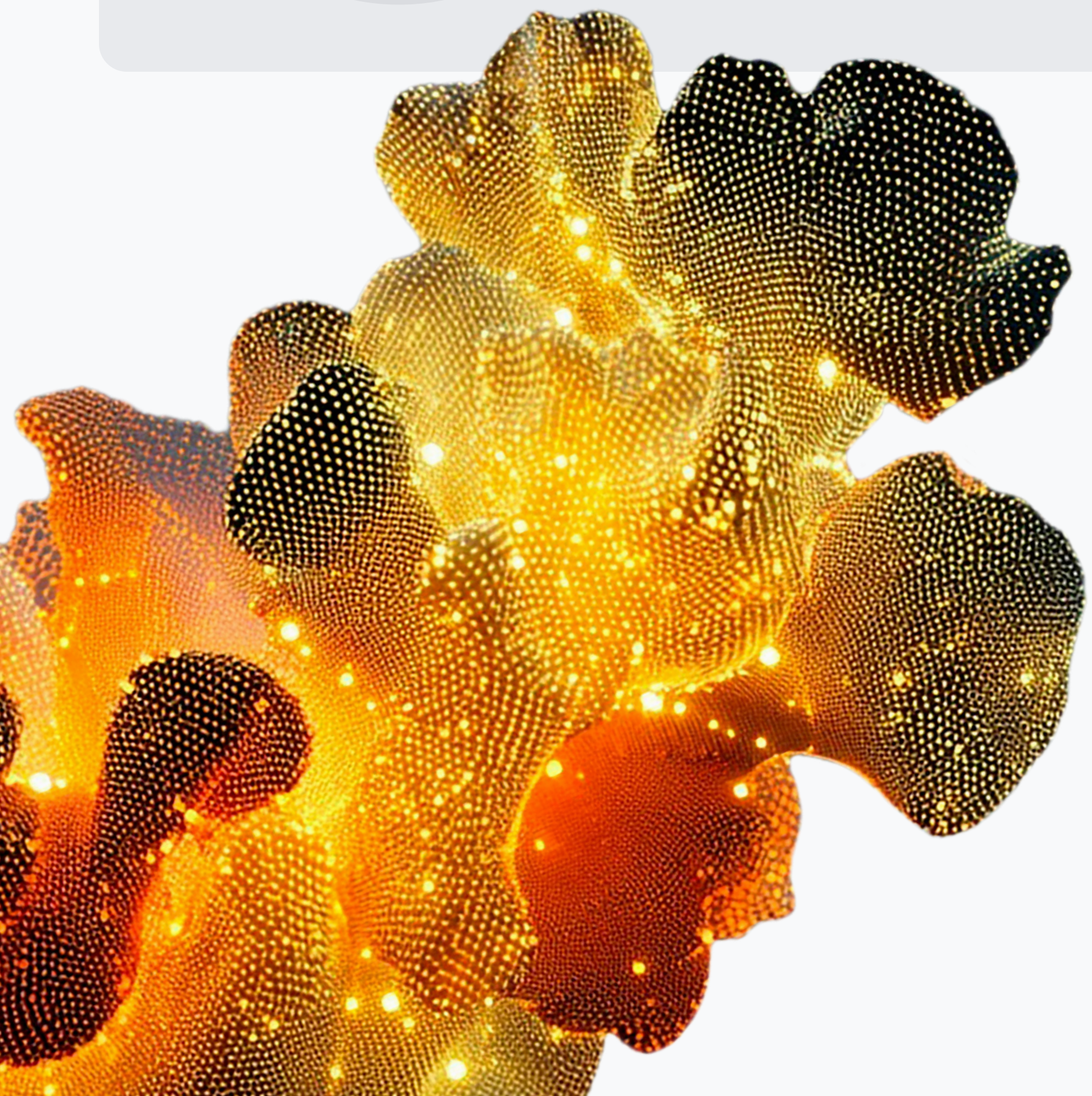
Agent orchestration



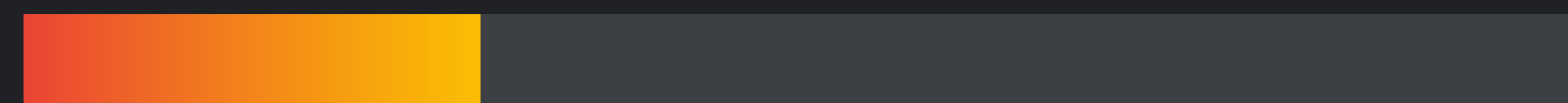


40%

of media and entertainment executives say their organizations have launched more than 10 AI agents⁶

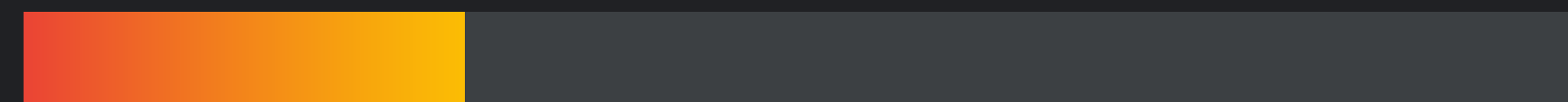


How AI agents are being used⁷



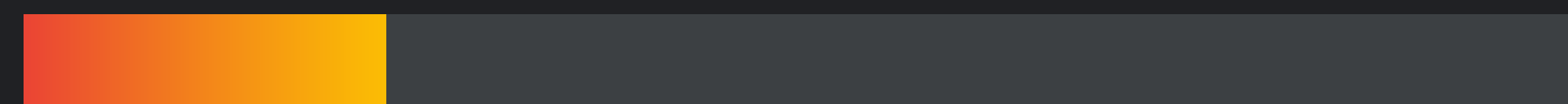
29%

use them for content and asset management



28%

use them for content and asset creation



23%

use them for monetization

⁶ M&E executives: n=471; Question: How many AI agents does your company currently have deployed in production across your organization?
⁷ M&E executives whose organization is leveraging agentic AI: n=252; Question: What use cases has your company deployed AI agents for?

“



The survey results align with our own experience. With agentic AI, we are exploring ways to involve these new ‘digital teammates’ in our work. While gen AI helped us create, agentic AI enables autonomous processes that accelerate our creative workflow and, in some cases, drive results beyond our expectations.”



Dustin Myers

Executive Vice President, Production Operations & Technology, FOX Sports

Agentic AI use cases in action

AI agents are now actively tackling core challenges in media and entertainment.

From enhanced security operations to accelerated software development and augmented creative workflows, these applications are helping people get more done.

However, industry-specific use cases (e.g., content management, creation, and monetization) show lower adoption than cross-industry ones. These areas can involve sensitive intellectual property and nuanced creative processes, unlike more standardized enterprise functions.

Ultimately, by demonstrating clear value in cross-industry applications, agentic AI is accelerating organizational readiness for more complex, industry-specific use cases within media and entertainment.



Top AI agent use cases in media and entertainment



Among M&E executives whose organization is leveraging agentic AI: n=252; Question: What use cases has your company deployed AI agents for?
* Use cases specific to media and entertainment

The ROI of AI agents

AI agent use cases already show ROI, with security operations (35%), marketing (34%), and product innovation (33%) leading the way.⁸ While marketing use cases are the seventh most adopted, they jump to second place by ROI. This reveals AI agents' power to speed up the creation of ad creatives and promotional narratives, directly translating to increased campaign reach and conversion.

“



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 AI agent use cases that have already shown ROI



⁸ Among M&E executives whose organization is leveraging agentic AI: n=252; Question: Which of the AI agent types that your company has deployed have seen ROI?
* Use cases specific to media and entertainment

⁸ M&E executives whose organization is leveraging agentic AI: n=252; Question: Which of the AI agent types that your company has deployed have seen ROI?



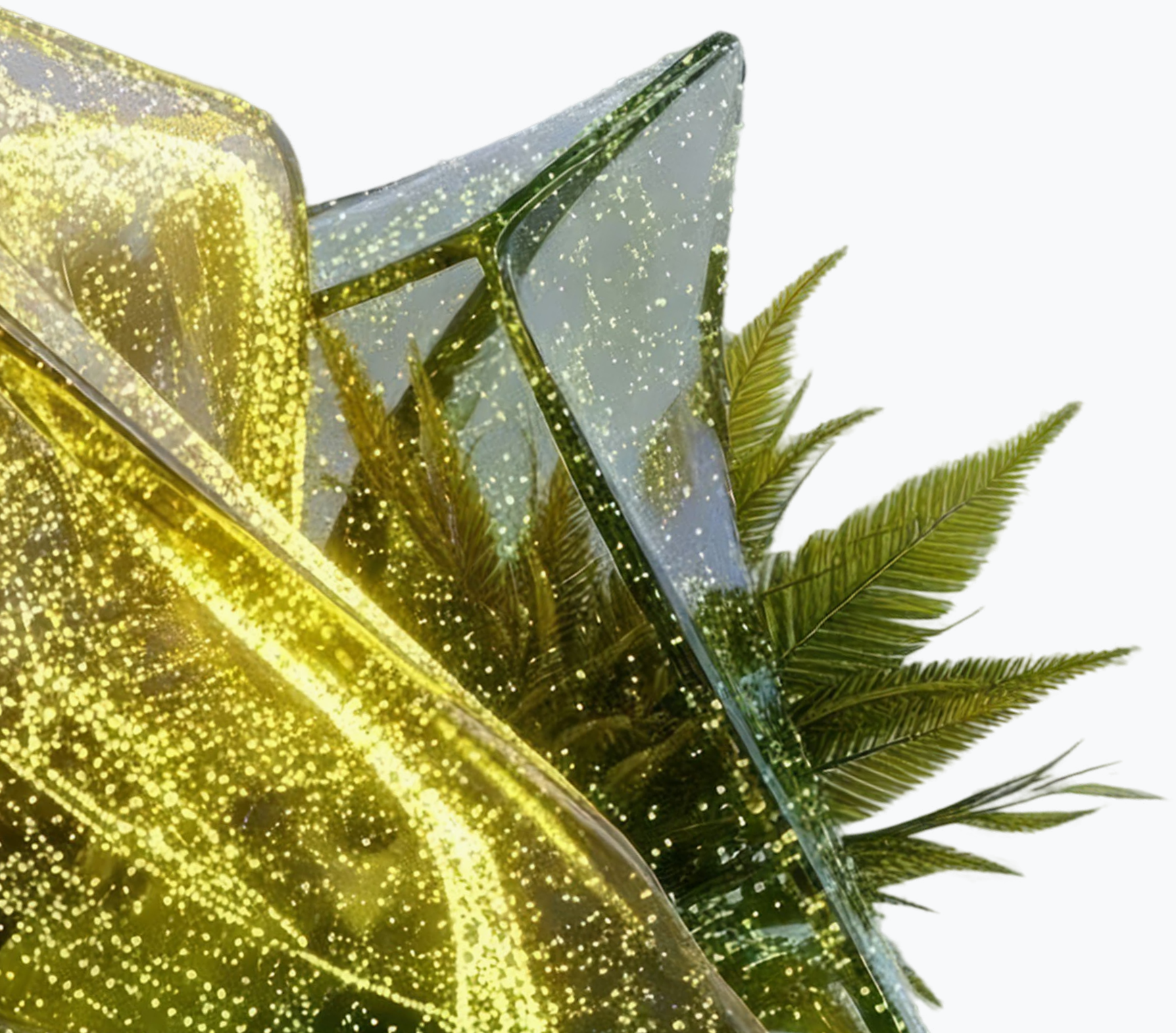
02

5 proven areas where AI is delivering ROI

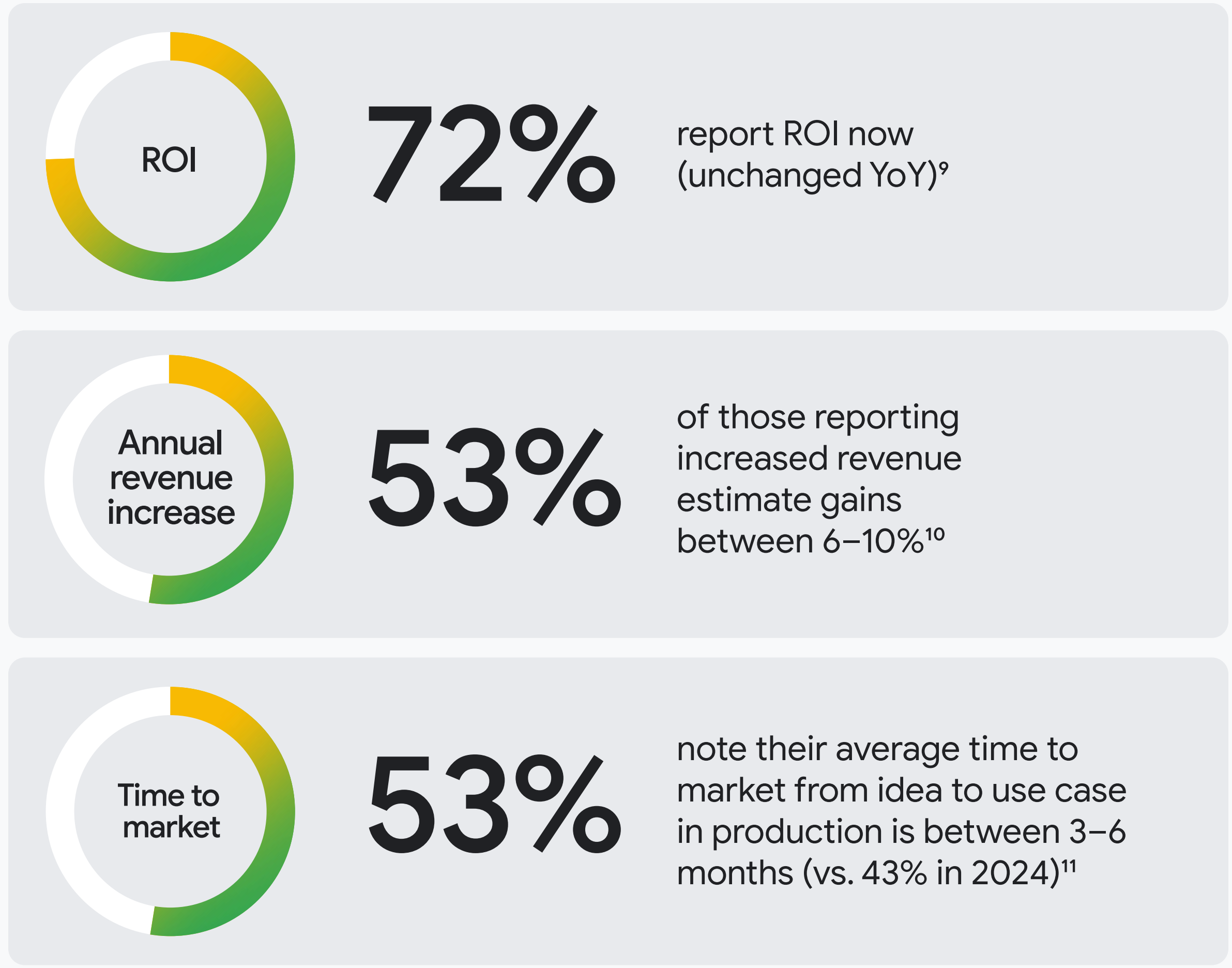


While AI agents represent the new frontier, the foundational value of gen AI continues to deliver compounding returns.

Our research shows five key areas where gen AI continues to drive a significant impact for media and entertainment organizations. While 2024 proved gen AI's real-world impact, 2025 is all about building on that success.



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

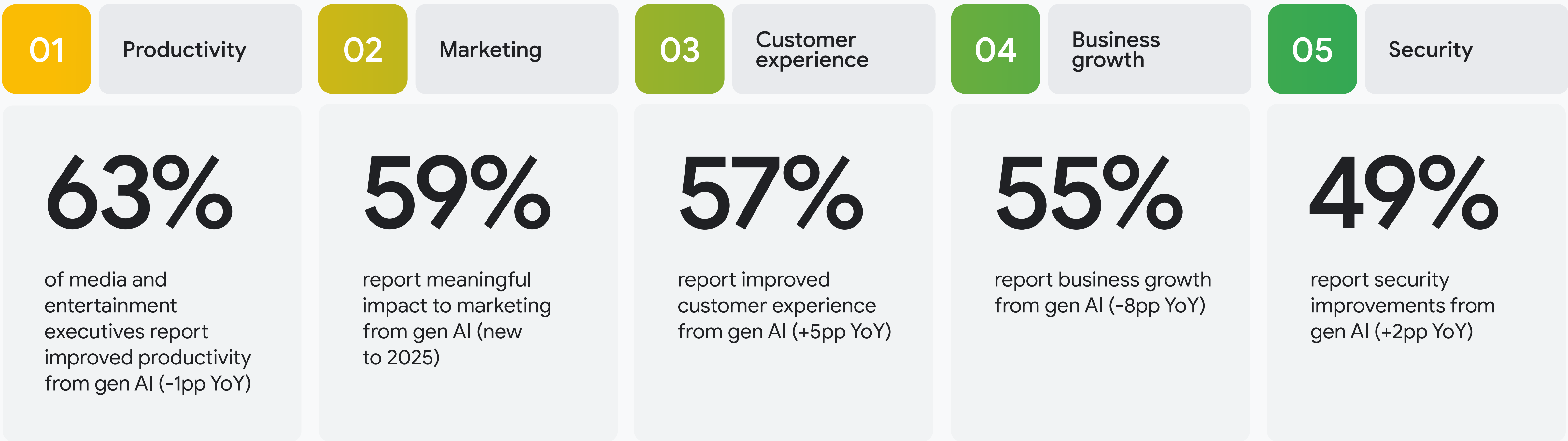


⁹ M&E executives: 2024: n=169, 2025: n=471; Question: In what timeframe do you expect gen AI to deliver ROI to the following areas of your business?
¹⁰ M&E executives reporting increased revenue from gen AI solutions: 2024: Insufficient sample size, 2025: n=167; Question: (1) In what ways did your company experience business growth as a direct result of gen AI? (2) Based on your past/existing gen AI initiatives, how much did gen AI directly increase overall annual company revenue?
¹¹ M&E executives: 2024: n=168, 2025: n=471; Question: What is the average time to market from idea to use case in production?



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.



Among M&E executives: 2024: n=169, 2025: n=471; Question: In which of the following areas have your gen AI solutions created meaningful impact?

Productivity

Media and entertainment organizations report tangible improvements in gen AI-driven productivity.

Specifically, among those reporting increased productivity, executives are more likely to report increased IT staff productivity and faster time to insight.¹²

For example, “vibe coding”—an approach where developers use gen AI tools to generate code—can help speed up the development of interactive content features and bespoke streaming platform tools. These advances strengthen the technology backbone of the industry that powers content creation and delivery.

63%

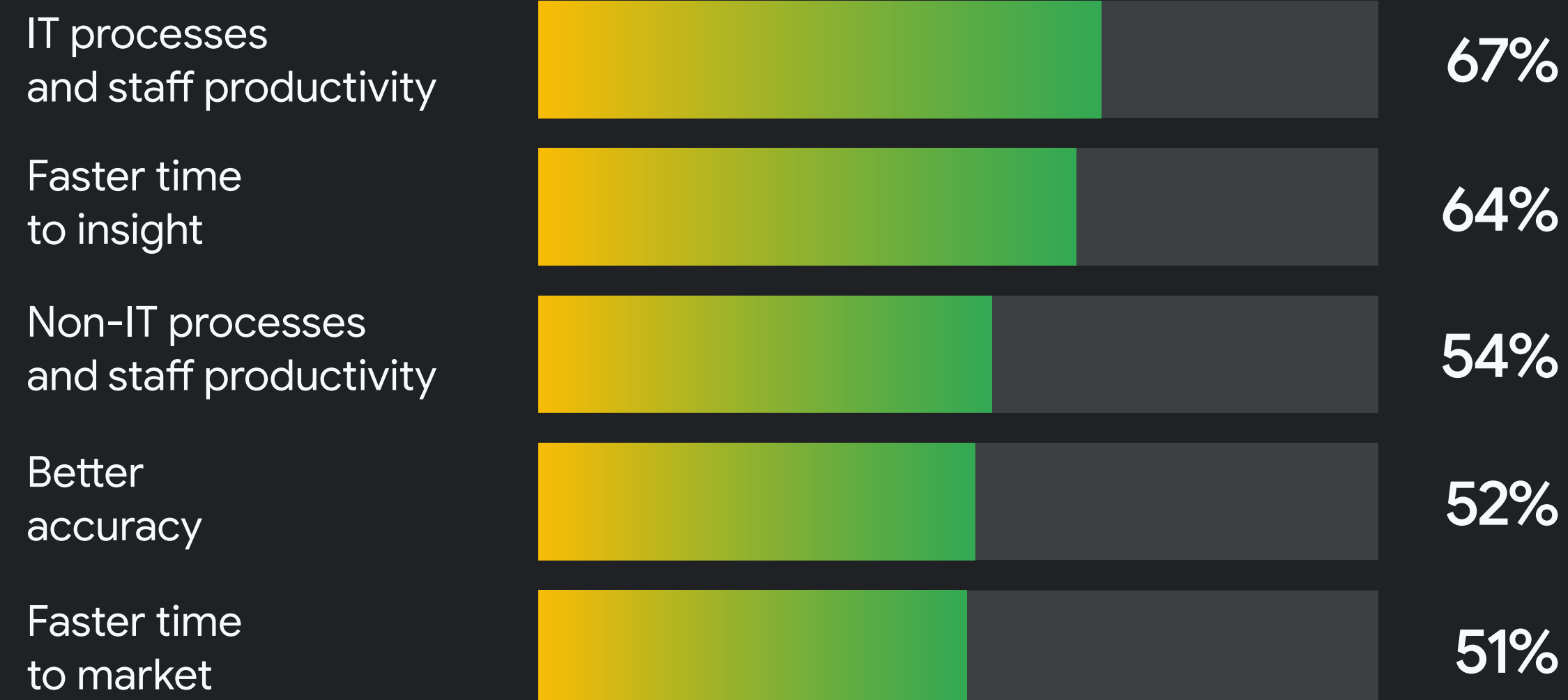
report gen AI has improved productivity (vs. 64% in 2024)¹³

47%

indicate their employee productivity at least doubled as a result of gen AI (of those reporting increased organizational productivity) (vs. 34% in 2024)¹⁴



Improved employee productivity resulting from gen AI solutions



Among M&E executives reporting improved productivity from gen AI solutions: 2024: n=103, 2025: n=291; Question: In what ways did gen AI directly increase productivity for your company?

Key area where AI is driving ROI

32%

saw ROI on gen AI use cases for individual productivity (emails, documents, presentations, meetings, chat) (unchanged YoY)¹⁵

¹² M&E executives reporting improved productivity from gen AI solutions: 2024: n=103, 2025: n=291; Question: (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)?

(2) In what ways did gen AI directly increase productivity for your company?

¹³ M&E executives: 2024: n=169, 2025: n=471; Question: In which of the following areas have your gen AI solutions created meaningful impact?

¹⁴ M&E executives reporting improved productivity from gen AI solutions: 2024: n=108, 2025: n=299; Question: 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)?

¹⁵ M&E executives whose organization is currently using or planning to use gen AI for individual productivity: 2024: n=152, 2025: n=438; Question: In what timeframe do you expect gen AI to deliver ROI to the following areas of your business?

Marketing

The media and entertainment landscape is characterized by a proliferation of streaming services, social media platforms, and diverse content formats all vying for limited audience attention.

To attract new viewers, listeners, or readers, marketers can use gen AI to create tailored marketing content for customer segments based on behavior and preferences, and to generate ad copy variations at scale, optimizing for different audiences, channels, and regions. It all helps maximize audience relevance and increase conversion.

59%

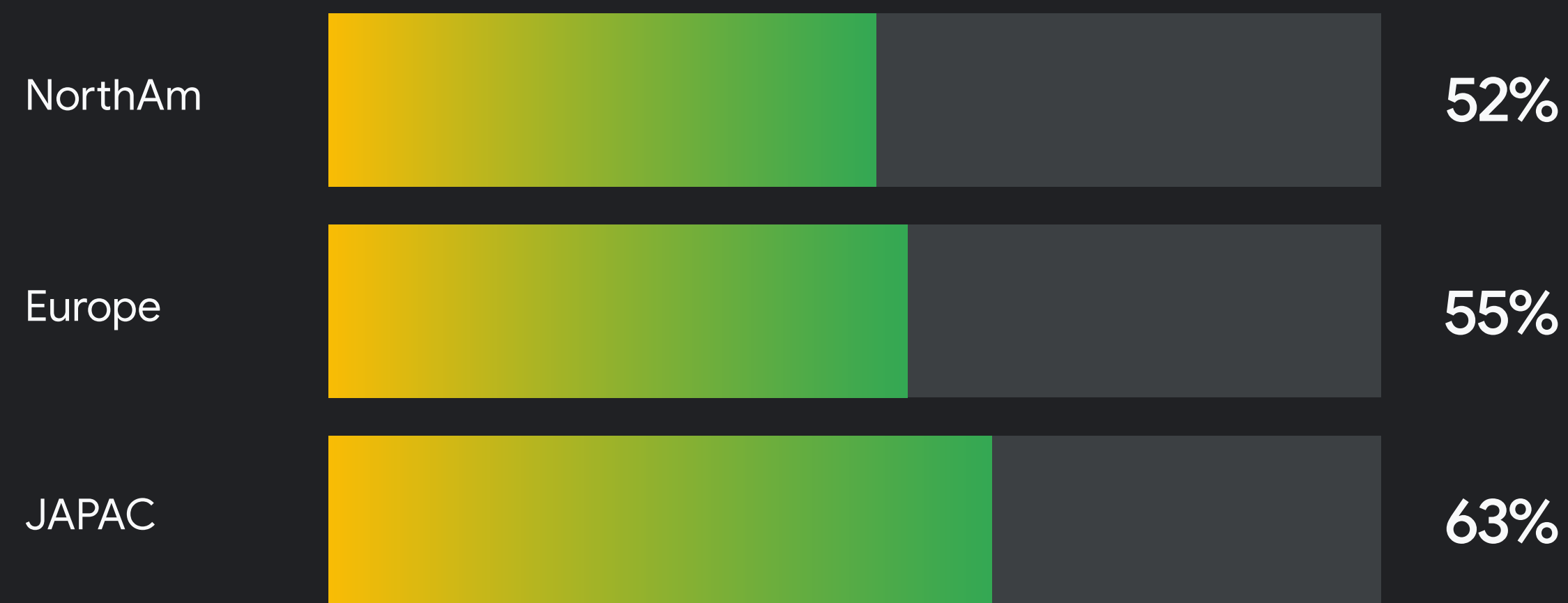
report gen AI has resulted in meaningful impact to marketing outcomes (new to 2025)¹⁶

¹⁶ M&E executives: 2025: n=471; Question: In which of the following areas have your gen AI solutions created meaningful impact?

¹⁷ M&E executives whose organization is currently using or planning to use gen AI for sales and marketing: 2024: n=160, 2025: n=425; Question: In what timeframe do you expect gen AI to deliver ROI to the following areas of your business?



Improved marketing resulting from gen AI solutions across regions



Among M&E executives: NorthAm: n=151, Europe: n=110, JAPAC: n=105; LATAM data not shown due to low base; Question: In which of the following areas have your gen AI solutions created meaningful impact?

Key area where AI is driving ROI

33%

saw ROI on gen AI use cases for sales and marketing (field sales activities, marketing operations, and content creation) (vs. 28% in 2024)¹⁷



Customer experience

In a crowded media and entertainment market, personalization is key to engaging audiences.

It's why 45% of media and entertainment executives report their organization plans to pursue improved customer experience as a key business objective in the coming years. This is a huge jump from its position as the lowest-ranked objective in 2024.¹⁸

For those already seeing results, gen AI is proving instrumental for viewer engagement and retention. A streaming service or broadcaster, for example, could offer more intuitive discovery of relevant shows and movies. A news publisher could deploy a virtual assistant to help readers manage their subscriptions and answer common questions. Or sports leagues and teams could serve up personalized highlights, scores, and content, ultimately deepening fan engagement and loyalty.

57%

report gen AI has improved customer experience (vs. 52% in 2024)¹⁹

29%

indicate improvement in customer experience of more than 10% (of those reporting improved customer experience) (insufficient data in 2024)²⁰

¹⁸ M&E executives: 2024: n=169, 2025: n=471; Question: 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?

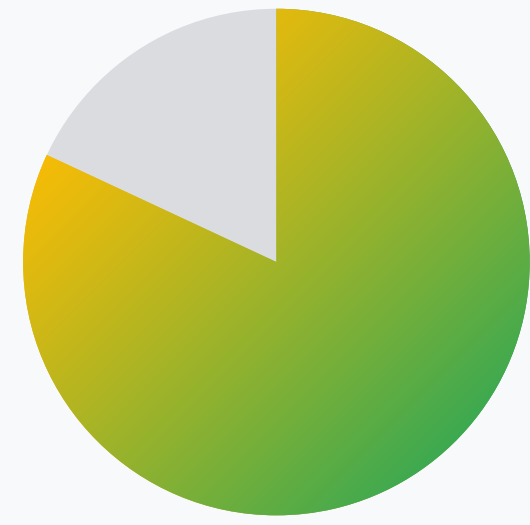
¹⁹ M&E executives: 2024: n=169, 2025: n=471; Question: In which of the following areas have your gen AI solutions created meaningful impact?

²⁰ M&E executives reporting improved customer experience from gen AI solutions: 2025: n=267; Question: (1) In what ways did your company experience improved user experience as a direct result of gen AI? (2) Based on your past/existing gen AI initiatives, how much did gen AI directly improve user experience?



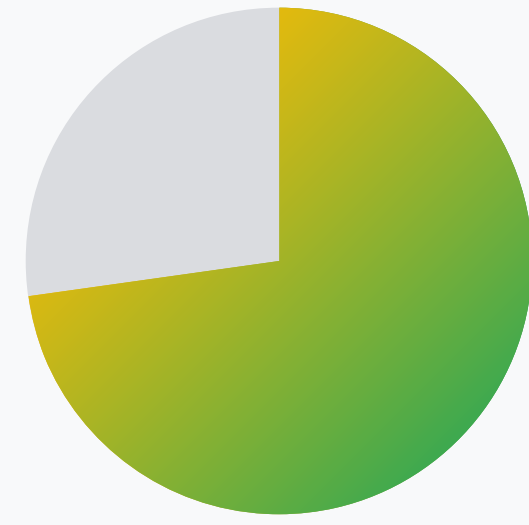


Improved customer experience resulting from gen AI solutions



82%

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

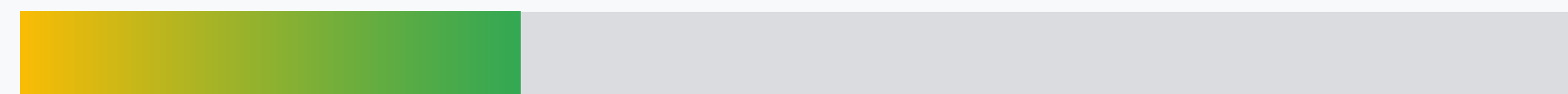


73%

improved user satisfaction/ Net Promoter Score

Among M&E executives reporting improved customer experience from gen AI solutions: 2025: n=270; Question: In what ways did your company experience improved user experience as a direct result of gen AI?

Key area where AI is driving ROI



32%

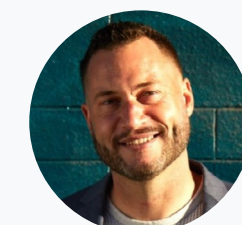
saw ROI on gen AI use cases for customer experience and field service (including chat, call centers, and in-field technician support) (vs. 26% in 2024)²¹

²¹ M&E executives whose organization is currently using or planning to use gen AI for customer experience and field service: 2024: n=157, 2025: n=434; Question: In what timeframe do you expect gen AI to deliver ROI to the following areas of your business?

“



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

Business growth

Gen AI's impact on business growth is more subdued this year.

Following last year's "gold rush," it seems that media and entertainment organizations are prioritizing new revenue streams. For example, among those reporting that gen AI has resulted in business growth, 68% report their organization has successfully created new products or services.²²

Gen AI use cases that can help diversify revenue streams and fuel growth:

- ✓ Storyboarding to accelerate content creation
- ✓ Content localization to reach global audiences
- ✓ Personalized content recommendations and search to increase engagement
- ✓ Natural language search to unlock the value of media archives
- ✓ Content and advertising understanding for metadata enrichment, classification, monetization, personalization, moderation, and compliance
- ✓ Document processing to automate sales, licensing, and usage rights management

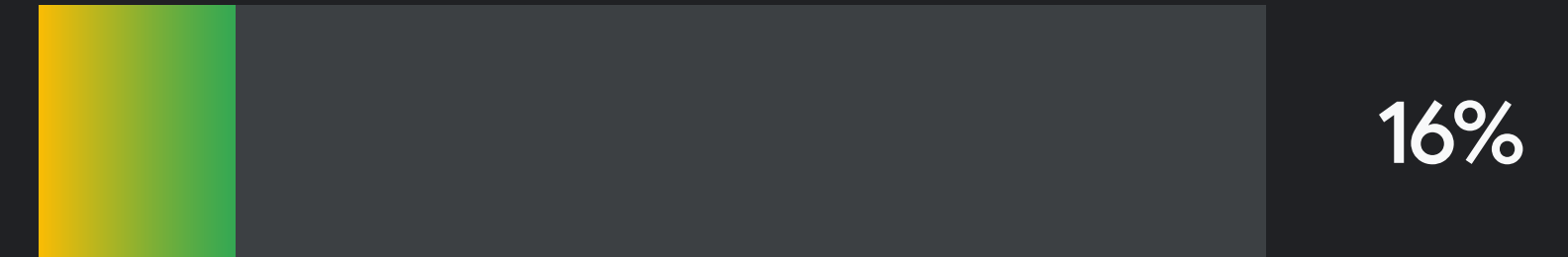


55%

report gen AI has resulted in business growth (vs. 63% in 2024)²³

Revenue growth resulting from gen AI solutions

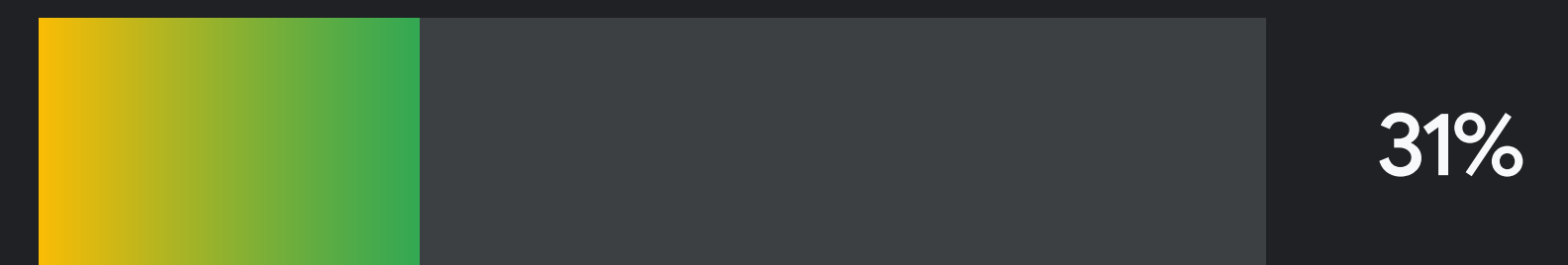
Increased overall annual revenue between 1–5%



Increased overall annual revenue between 6–10%



Increased overall annual revenue more than 10%



Among M&E executives reporting increased revenue from gen AI solutions: 2025: n=167; Question: (1) In what ways did your company experience business growth as a direct result of gen AI? (2) Based on your past/existing gen AI initiatives, how much did gen AI directly increase overall annual company revenue?

²² M&E executives reporting business growth from gen AI solutions: 2025: n=259; Question: In what ways did your company experience business growth as a direct result of gen AI?

²³ M&E executives: 2024: n=169, 2025: n=471; Question: In which of the following areas have your gen AI solutions created meaningful impact?



Security

Given the high value of content and user data, gen AI's ability to improve the security posture for media and entertainment organizations is critical.

Among those reporting an improved security posture, 73% find that gen AI solutions can significantly improve their ability to identify threats and 67% find it helps integrate intelligence and response.²⁴

It all helps protect against sophisticated content piracy and intellectual property leakage of unreleased assets, while safeguarding vast consumer data. This ensures core creative assets and consumer trust remain intact.

49%

report gen AI has resulted in meaningful impact to security posture (vs. 47% in 2024)²⁵

Improved security resulting from gen AI solutions



73%

improved ability to identify threats



67%

improved intelligence and response integration



58%

reduction in time to resolution



51%

reduction in number of security tickets

Among M&E executives reporting improved security posture from gen AI solutions: 2025: n=231; Question: Based on your past/existing gen AI initiatives, how did gen AI directly improve your company's security posture?

²⁴ M&E executives reporting improved security posture from gen AI solutions: 2025: n=231 Question: Based on your past/existing gen AI initiatives, how did gen AI directly improve your company's security posture?

²⁵ M&E executives: 2024: n=169, 2025: n=471; Question: In which of the following areas have your gen AI solutions created meaningful impact?

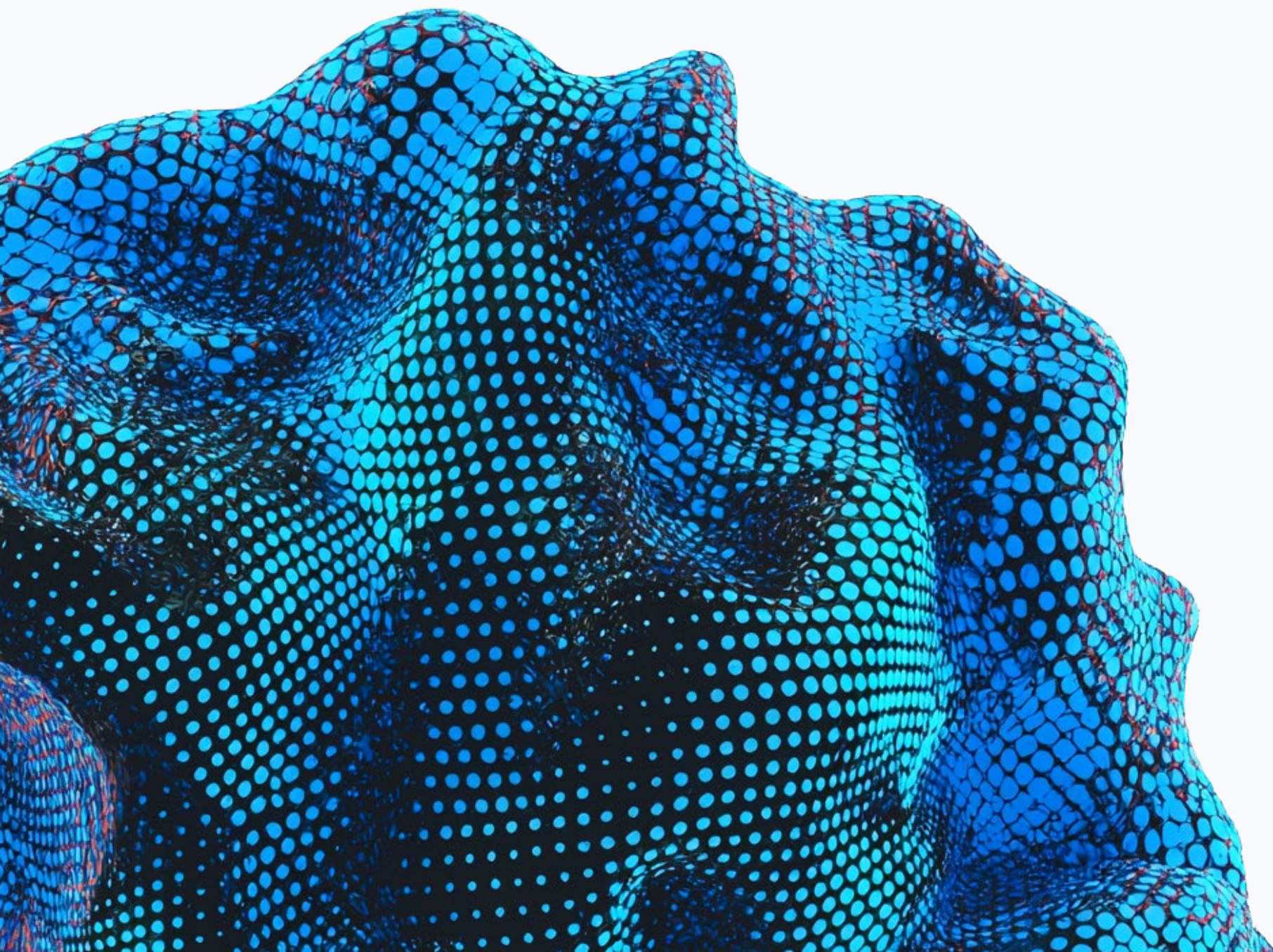


03

Invest in the AI-ready future

The maturation of AI signals a shift in business priorities.

As media and entertainment organizations make progress on foundational goals like operational efficiency, customer experience, and employee productivity, business objectives are shifting. The focus is now moving toward the next wave of innovation, with AI agents emerging as a new strategic objective.



Top business objectives to pursue with gen AI within the next 2–3 years

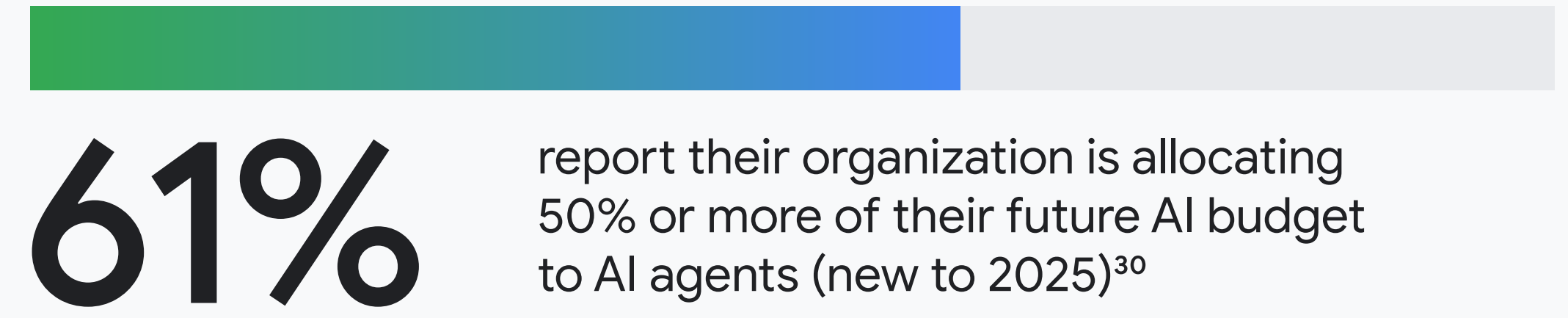
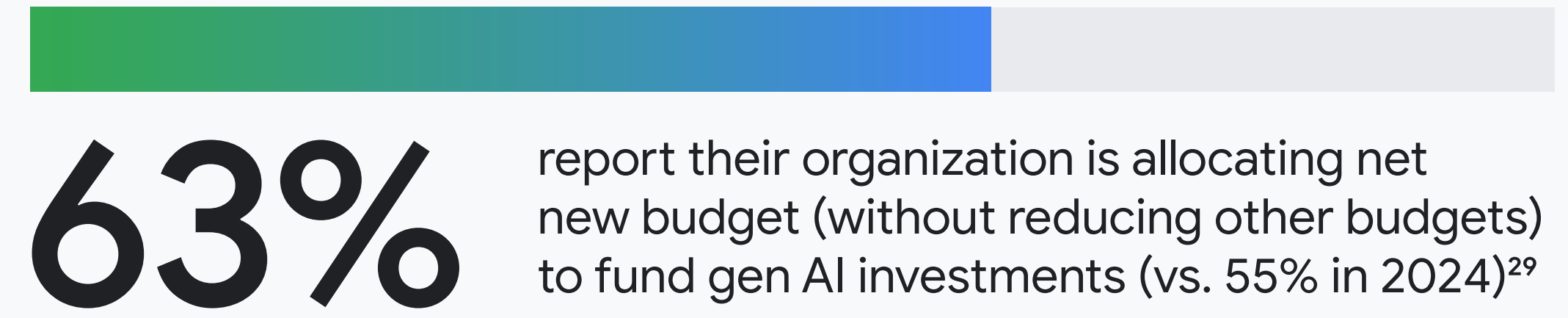
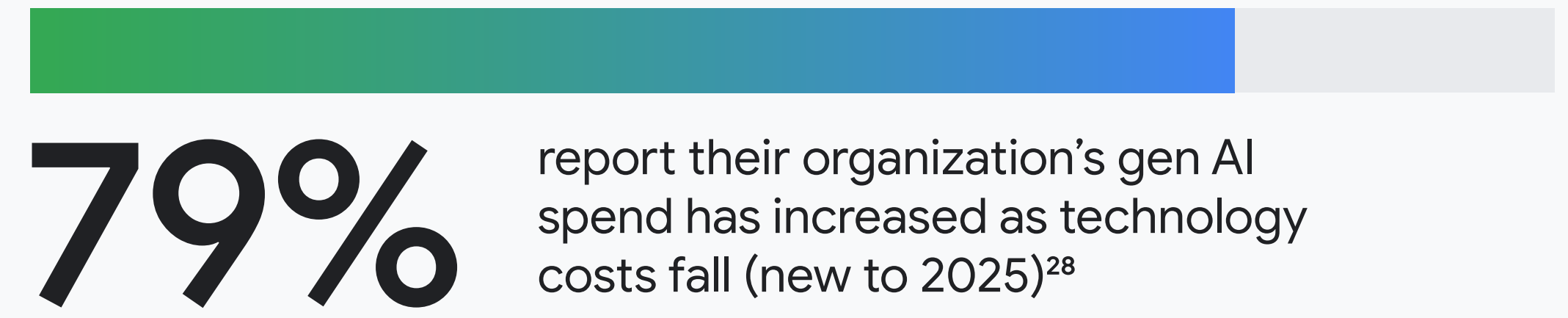
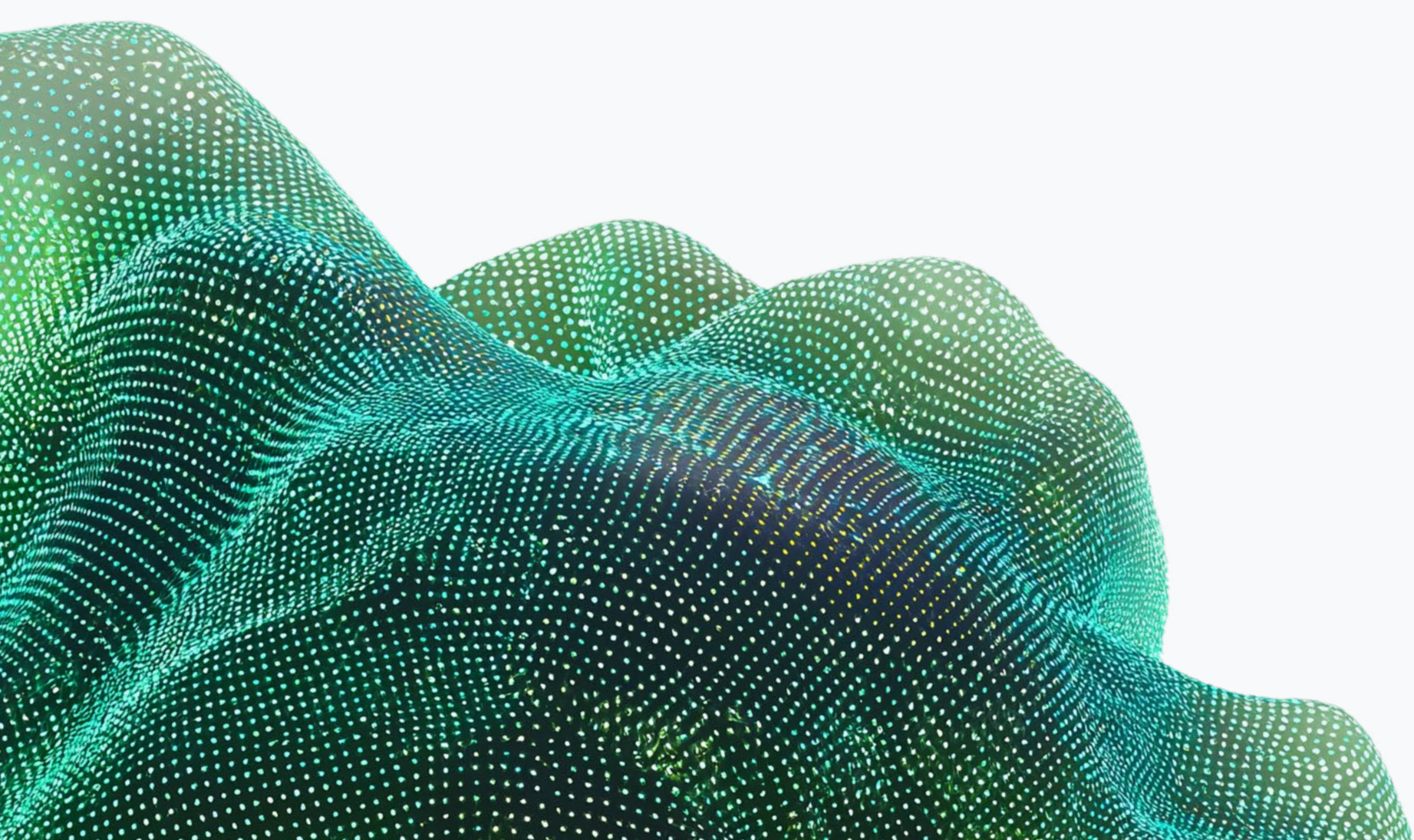


Among M&E executives: 2024: n=169, 2025: n=471; Question: In light of recently completed gen AI initiatives, which of the following business objectives are you planning to pursue with gen AI within the next 2-3 years?

AI budgets are following suit

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

Overall spending on AI is rising, even as technology costs fall. These investments are increasingly funded by net new budgets,²⁶ in addition to the 27% of total annual IT spend already allocated for AI.²⁷



²⁶ M&E executives: n=471; Question: What is your approach to funding gen AI?
²⁷ M&E executives: n=458; Question: What % of your total annual IT spend is allocated for AI? AI expenses would include talent, AI software licenses, AI hardware and infrastructure, AI application development. Please exclude data and BI analytics that are not directly using AI or ML.
²⁸ M&E executives: n=471; Question: Did the decreasing costs of AI technology (model training and operating) change your spending on gen AI?
²⁹ M&E executives: 2024: n=169, 2025: n=471; Question: What is your approach to funding gen AI?
³⁰ M&E executives: n=462; Question: What % of your future AI budget is being allocated to agents?

ROI needs C-suite sponsorship

In the media and entertainment industry—where AI initiatives often require deep cross-functional collaboration between technical, creative, and business teams—C-suite sponsorship is critical.

This top-level support aligns AI adoption with business goals, and helps organizations navigate once-in-a-generation decisions on the fundamental nature of content creation, intellectual property, and audience engagement.

Strong alignment between gen AI and business goals is more closely correlated with seeing ROI now on gen AI (at least one use case)



Among M&E executives who report their organization has strong alignment between gen AI and business goals: n=361; M&E executives who do not report strong alignment between gen AI and business goals: n=110; Question: In what timeframe do you expect gen AI to deliver ROI to the following areas of your business?



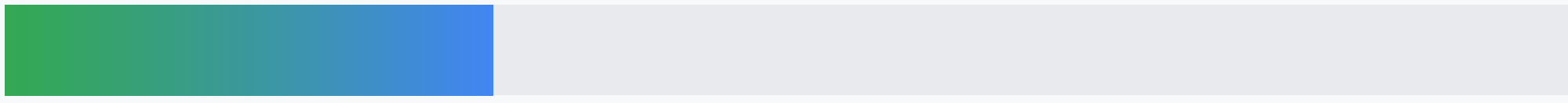
Key challenges to consider

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

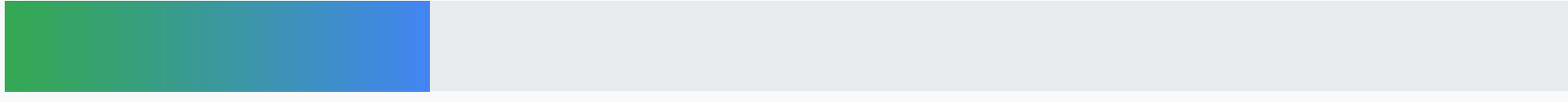
In media and entertainment, meeting the high standards for data security is paramount, given the critical need to protect invaluable intellectual property and sensitive audience data across every touchpoint.

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.

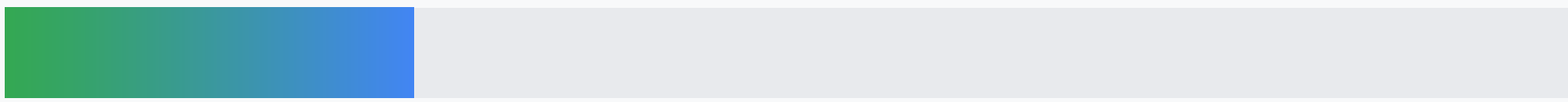
Top 3 considerations for LLM providers



31% Data privacy and security



27% Integration with existing systems



26% Scalability and performance

Among M&E executives: n=471; Question: Which of the following factors are MOST important to your company when considering LLM providers?



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 address intellectual property, creator rights, and ethical content generation.
- ✓ **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 digital asset management systems, content delivery networks, and audience analytics platforms. Grant it secure, governed access.
- ✓ **Invest in your talent and internal AI education program** to build and manage the AI agents so they can handle valuable media assets and creative workflows. The most successful companies don't just buy technology, they build skills.

Google Cloud

See where your
business could
realize ROI from AI.

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