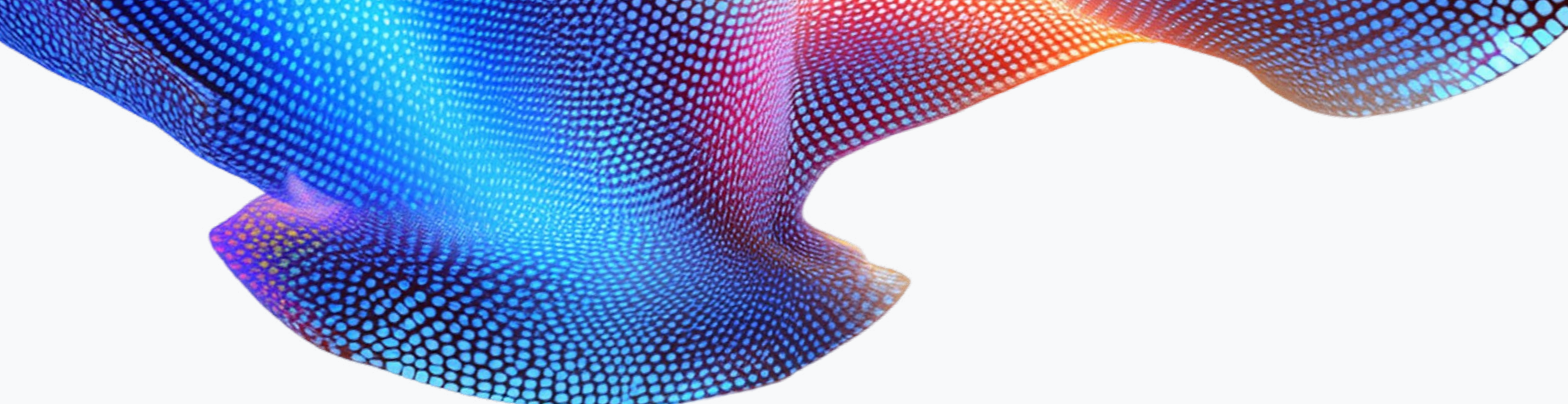




The ROI of AI

in security

How agents are delivering the next wave of proactive enterprise security.



Executive summary

For today's CISO, the conversation around AI has moved beyond hype and into the practical discussion of revenue acceleration, increased productivity, competitive differentiation, and risk reduction. The question is no longer "if" AI should be used, but "how" it can be scaled to measurably improve an organization's growth trajectory and security posture.

Our latest research confirms this fundamental change in business mindset. The next evolution in AI-driven security is the shift to AI autonomy from AI assistance. AI agents now act as extensions of your security team, executing investigation and response workflows within your predefined guardrails. This allows security teams to move from a reactive to a proactive defense posture.

While many security teams are just starting their journey, the results from early adopters are compelling—with two-thirds seeing a positive impact from implementing AI technologies.¹ These organizations are automating routine tasks to free up analysts for critical threat hunting, ultimately accelerating incident response times. This isn't just a productivity boost; it's a strategic advantage.

For fellow leaders charting their course, this report draws from successful strategies of early adopters, offering concrete ways to translate agentic AI from a concept into tangible resilience for your organization.



Francis deSouza

Chief Operating Officer and President,
Security Products, Google Cloud



67%

of agentic AI early adopters have seen a positive impact on their organization's security posture as a result of gen AI¹

¹ Agentic AI early adopters: n=460; In which of the following areas have your gen AI solutions created meaningful impact?

Key insights in security

AI agents are now
a core security tool.

46%

of executives from
organizations leveraging
AI agents report deploying
them for security operations
and cybersecurity²

Early adopters have
the security advantage.

67%

of agentic AI early adopters
have seen a positive impact
on their organization's security
posture as a result of gen AI³

Gen AI continues
to deliver returns.

74%

of executives see ROI on at
least one gen AI use case⁴

Security is still
a roadblock to
implementation.

#1

concern for executives is
data privacy and security when
evaluating LLM providers⁵

² Executives whose organization is leveraging agentic AI: n=1814; Question: What use cases has your company deployed AI agents for?

³ Agentic AI early adopters: n=460; In which of the following areas have your gen AI solutions created meaningful impact?

⁴ Total (global): n=3466; Question: In what timeframe do you expect gen AI to deliver ROI to the following areas of your business?

⁵ Total (global): n=3466; Question: Which of the following factors are MOST important to your company when considering LLM providers?

Methodology

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

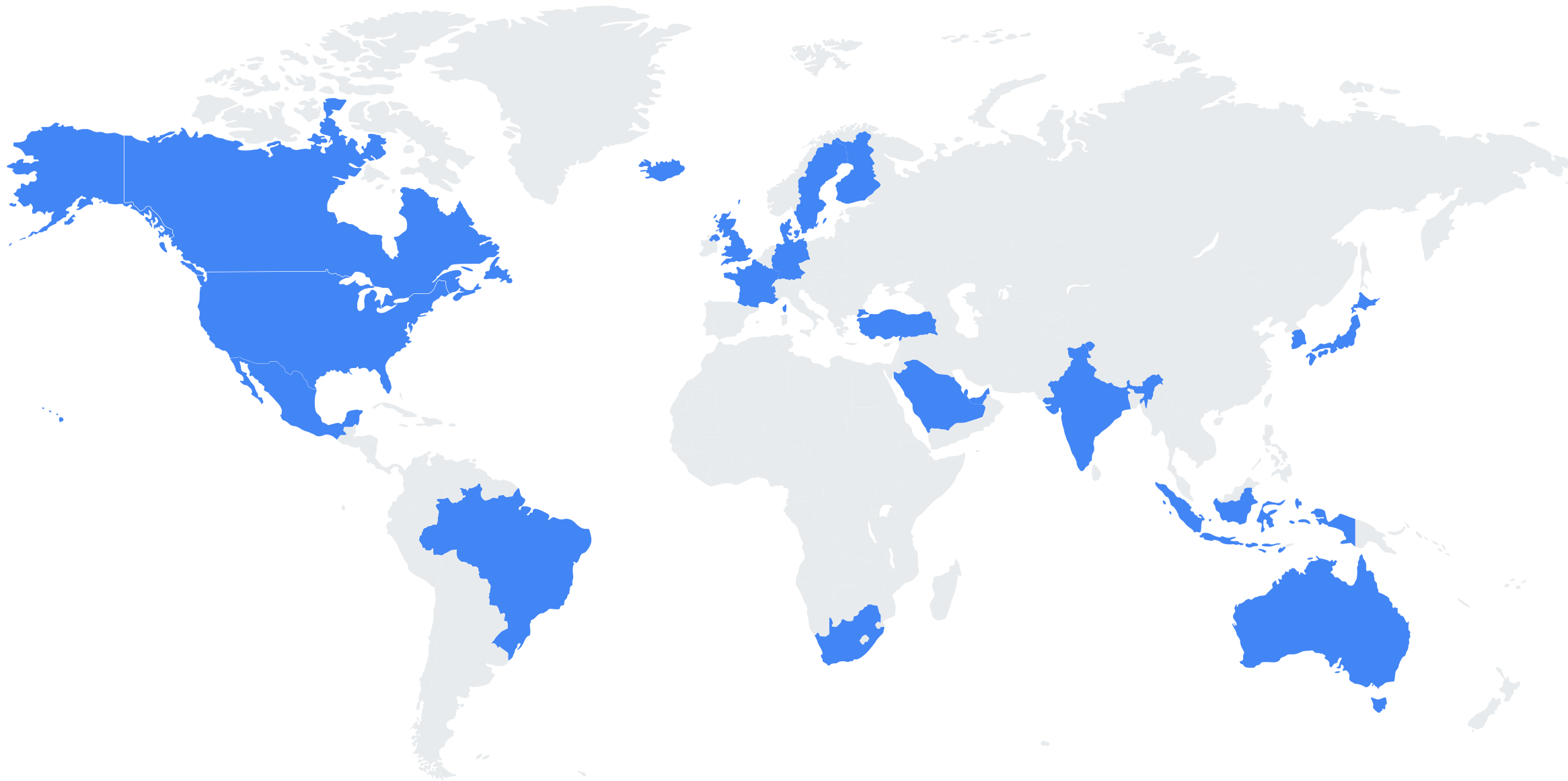
3,466 senior leaders of global enterprises:

- 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

Table of contents



The agentic shift 06

AI is delivering ROI 14

Investment trends for an AI-ready future 22

Your next steps 30





01

The agentic shift

The role of AI in security is rapidly progressing beyond assistance

While AI is proving invaluable for tasks like script generation and intel summarization, the truly transformative potential lies with AI agents.

Specialized agents can support critical functions like malware analysis, detection engineering, and alert triage or investigation. They are the building blocks for the future—a collaborative multi-agent system that executes workflows with or on behalf of defenders.

⁶ Executives whose organization is leveraging agentic AI: n=1814; Question: What use cases has your company deployed AI agents for?



46%

of executives from organizations leveraging AI agents report deploying them for security operations and cybersecurity⁶

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.



Levels of AI agent maturity

Level 1

Simple tasks

Intel summarization

Code/script generation



Level 2

AI agent applications

Malware analysis agent

Alert triage agent



Level 3

Multi-agent workflow

Incident response workflows



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.⁷

⁷ Executives whose organizations are leveraging agentic AI: Europe: n=329, JAPAC: n=447, LATAM: n=395; Question: 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	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: 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: (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?

Agentic AI 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.

“



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

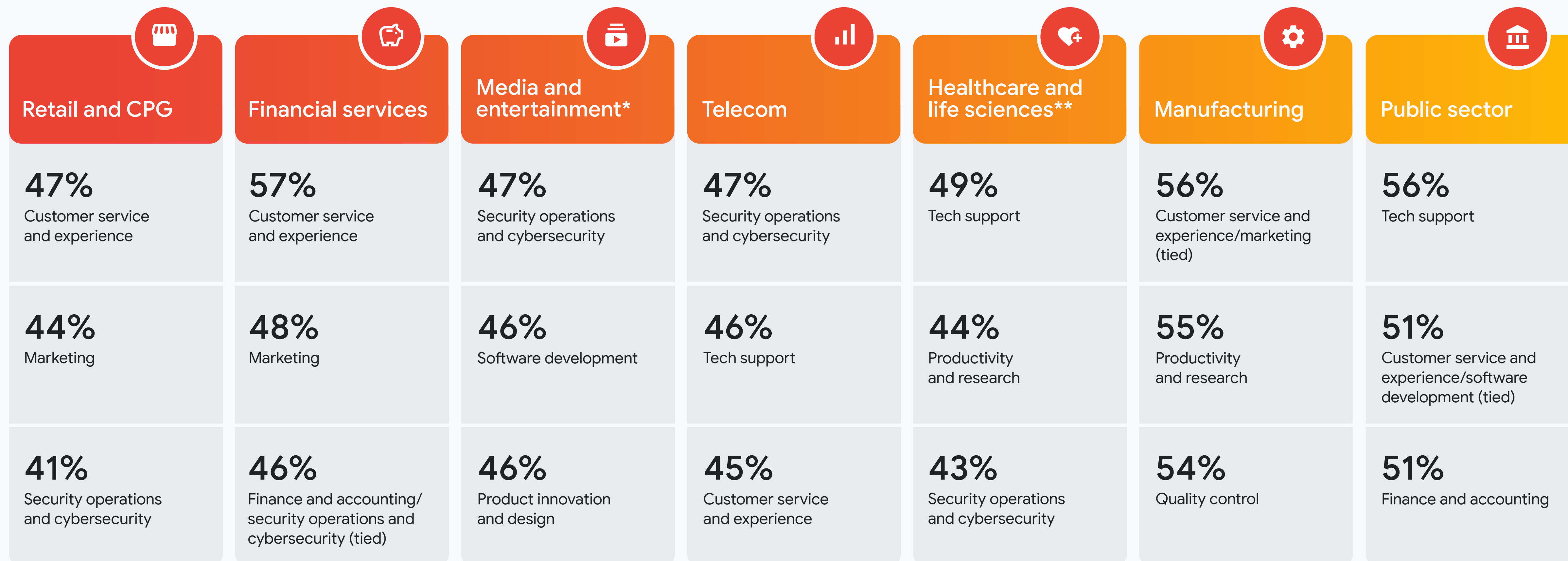
Cross-industry AI agent use cases



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



Security is a top AI agent use case across 5 of the 7 surveyed industries



* Less than five industry-specific use cases were shown to those in media and entertainment and public sector.

** 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: n=292, Public sector: n=138; Question: 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.

⁸ Agentic AI early adopters: n=460; Question: How many AI agents does your company currently have deployed in production across your organization?
⁹ Total (global): n=3466; Question: How many AI agents does your company currently have deployed in production across your organization?
¹⁰ Agentic AI early adopters: n=460; Question: Where is your organization in its gen AI journey?
¹¹ Total (global): n=3466; Question: Where is your organization in its gen AI journey?

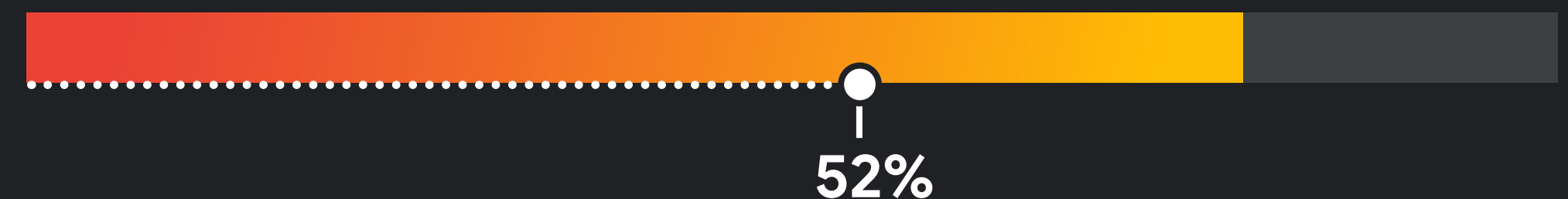
82%

of executives from agentic AI early adopter organizations report their organization has deployed more than 10 AI agents⁸ vs. 39% across all organizations⁹



78%

of executives from agentic AI early adopter organizations report their organization is leveraging gen AI in production for over a year¹⁰ vs. 52% across all organizations¹¹





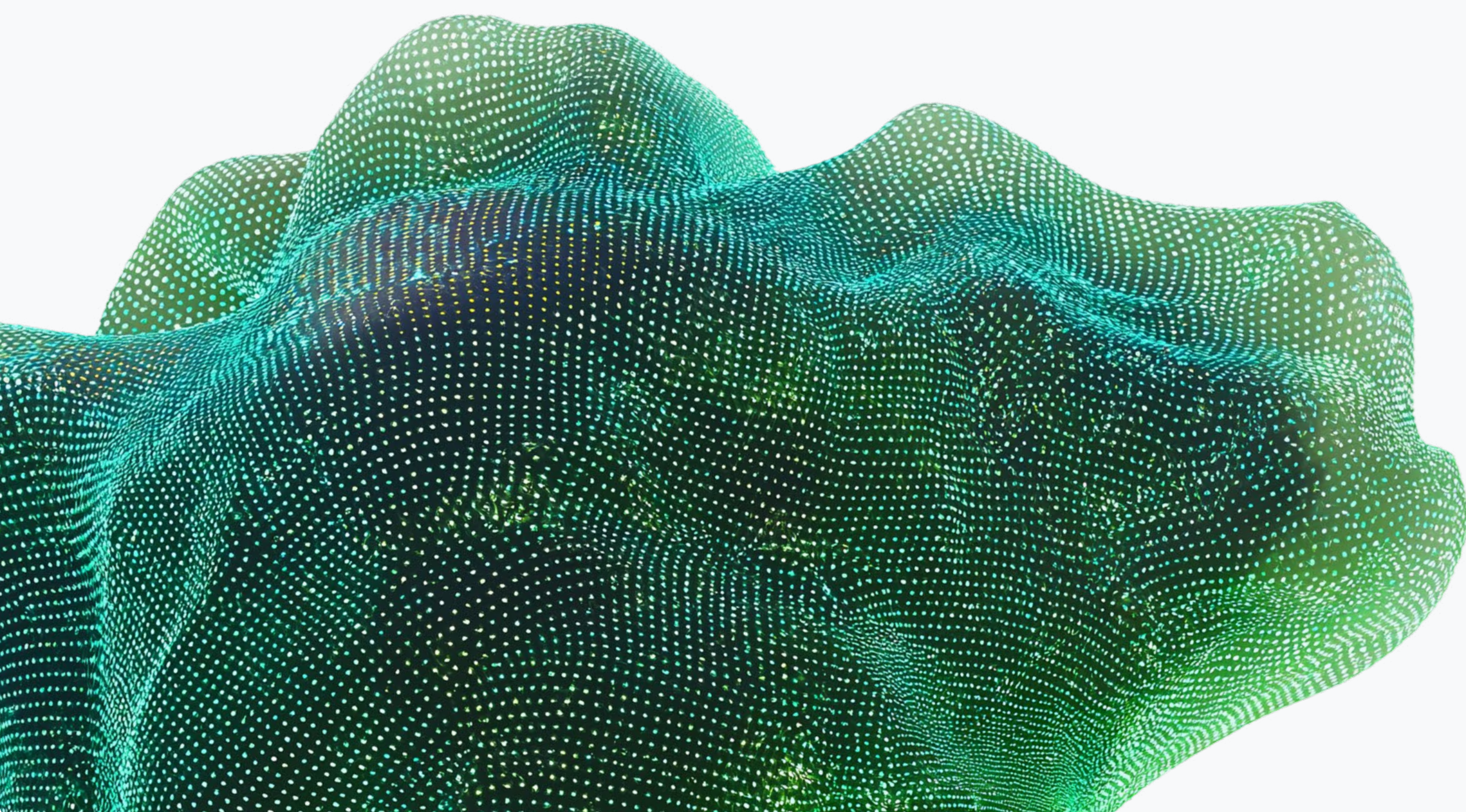
02

AI is delivering ROI

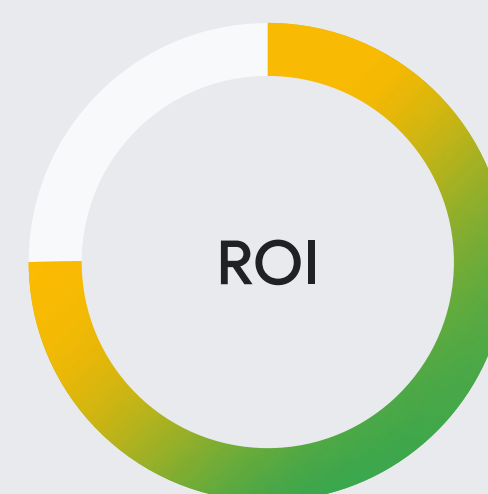


We're seeing a virtuous cycle in AI implementation—demonstrable ROI is accelerating the adoption of gen AI for certain use cases, which in turn justifies an even greater focus on those use cases.

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)¹²



53%

of those reporting increased revenue estimate gains between 6–10% (vs. 52% in 2024)¹³



51%

note their average time to market from idea to use case in production is between 3–6 months (vs. 47% in 2024)¹⁴

¹² Total (global): 2024: n=1539, 2025: n=3466; Question: In what timeframe do you expect gen AI to deliver ROI to the following areas of your business?

¹³ Executives reporting increased revenue resulting from gen AI solutions: 2024: n=678, 2025: n=1387; 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?

¹⁴ Total (global): 2024: n=1533, 2025: n=3459; Question: What is the average time to market from idea to use case in production?



Early adopters reap higher 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 case¹⁵ vs. 74% across all organizations¹⁶



Agentic AI early adopter organizations have at least 50% of their future AI budget allocated to agents¹⁷



39% of their organization's total annual IT spend is allocated to AI vs. 26% average¹⁸



Agentic AI early adopters are more likely to report significant value from gen AI across key areas—including customer experience, business growth, security, and marketing¹⁹



Executives from agentic AI early adopter organizations are also more likely to report ROI on all cross-industry agentic AI use cases²⁰

¹⁵ Agentic AI early adopters: n=460; Question: In what timeframe do you expect gen AI to deliver ROI to the following areas of your business?

¹⁶ Total (global): n=3466; Question: In what timeframe do you expect gen AI to deliver ROI to the following areas of your business?

¹⁷ Agentic AI early adopters: n=460; Question: What % of your future AI budget is being allocated to agents?

¹⁸ Agentic AI early adopters: n=459, Total (global): n=3315; 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.

¹⁹ Agentic AI early adopters: n=460, Total (global): n=3466; Question: In which of the following areas have your gen AI solutions created meaningful impact?

²⁰ Agentic AI early adopters: n=456, Total (global): n=1802; Question: Which of the AI agent types that your company has deployed have seen ROI?

AI proactively protects the enterprise

Gen AI is driving significant improvements in security, particularly for the early adopters.

AI's value is most pronounced in daily operations, enabling teams to achieve heightened speed and precision.

67%

of agentic AI early adopters have seen a positive impact on their organization's security posture as a result of gen AI²¹

²¹ Agentic AI early adopters: n=460; In which of the following areas have your gen AI solutions created meaningful impact?

Improved security posture from gen AI among agentic AI early adopters



85%

improved intelligence and response integration (vs. 74% total)



85%

improved ability to identify threats (vs. 77% total)



65%

reduction in time to resolution (vs. 61% total)



58%

reduction in number of security tickets (vs. 53% total)

Executives reporting improved security posture with gen AI solutions: Agentic AI early adopters: n=309, Total (global): n=1711; Question: Based on your past/existing gen AI initiatives, how did gen AI directly improve your company's security posture?

“

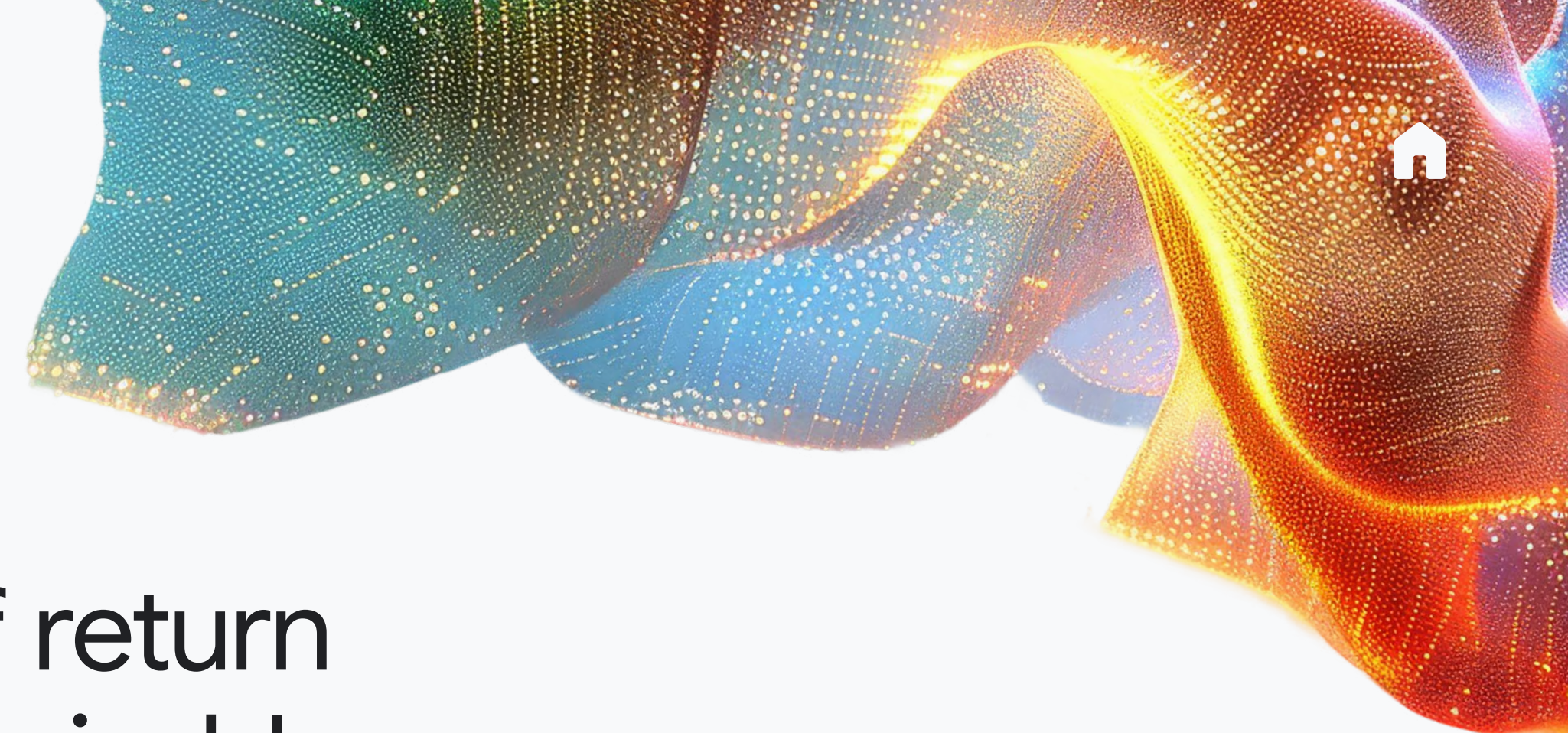


You have to look at ROI as not just size of return but also speed of return. AI initiatives are sizable investments that are not commodities yet, so we have to look at where hyper-automation and scaling with AI is actually generating a return first. How fast is your investment coming back to the organization 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





Use AI 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 Security Operations, businesses saw:

\$1.2M

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

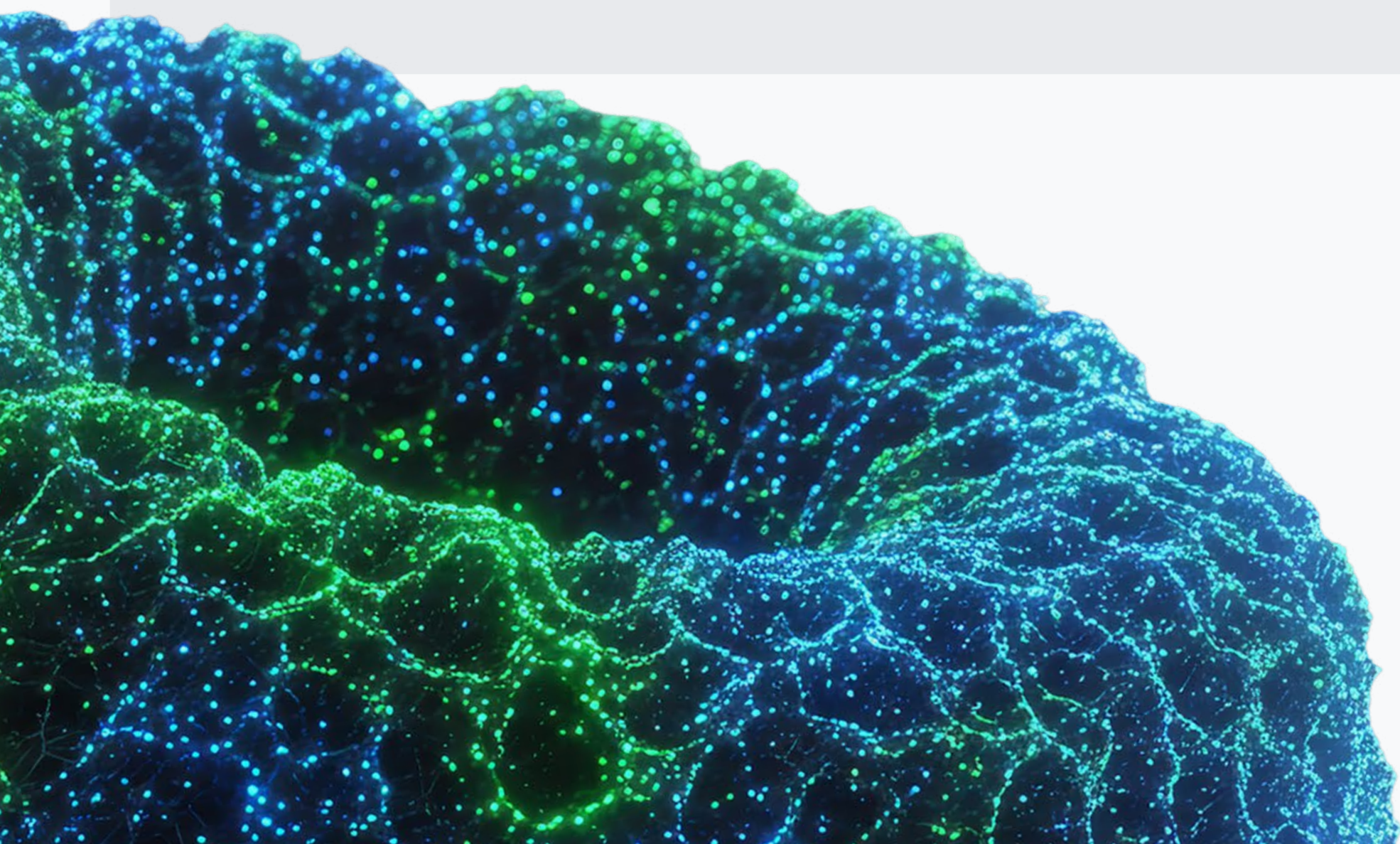
70%

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](#), 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.





Use AI to:

Hunt for specific threats in the environment

Objective

An analyst needs to investigate a new alert and determine if there is any evidence of a specific command being used to infiltrate infrastructure by modifying the registry.

Action

The AI is prompted to create a query to find all registry modification events on a specific hostname over a given time period. In a follow-up action, the AI generates a new detection rule to automatically monitor for and detect that behavior in the future.

See more prompts



Use AI to:

Analyze and profile a malware variant

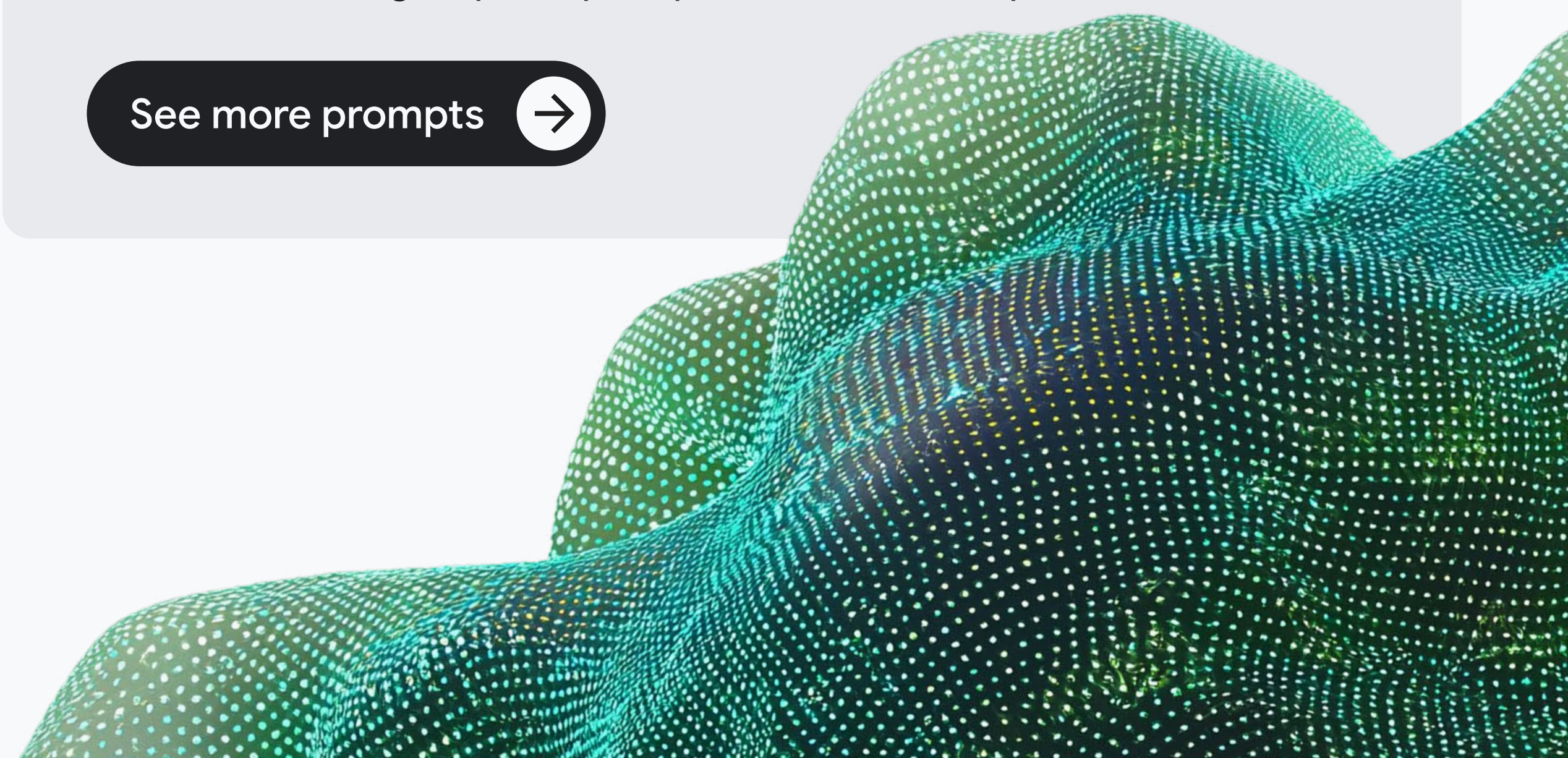
Objective

A security analyst is onboarding and wants to learn more about a specific malware (e.g., HANGMAN.V2) that was identified in an AI-generated case summary.

Action

The AI is first asked “What is HANGMAN.V2?” to get a summary of its capabilities, relation to threat actors like APT43, and known behaviors. The analyst then asks a follow-up question: “How does HANGMAN.V2 persist?” The AI shares the specific command used to add a registry entry for persistence on a system.

See more prompts





“



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



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.

“



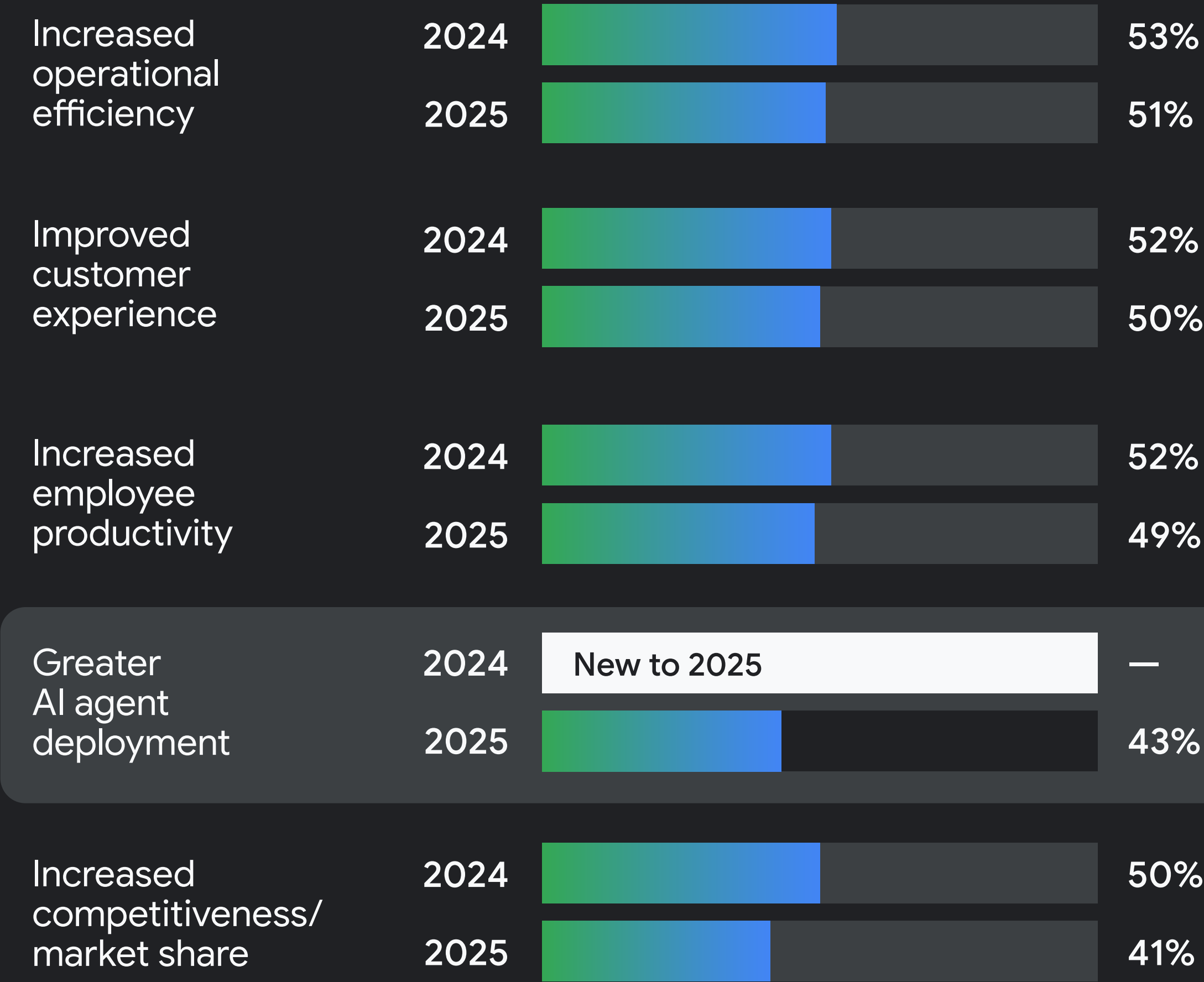
AI technology is evolving quickly. A year ago, very few people were talking about AI agents and agentic AI at the enterprise level. With agentic AI as a positive disruptive force for our industry, we have to rethink processes for people and AI consumption—prioritizing agentic AI is about setting ourselves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



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



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



Total (global): 2024: n=1539, 2025: n=3466; 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?

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,²² in addition to 26% mean percent of total annual IT spend already allocated for AI.²³



77%

report their organization's gen AI spend has increased as technology costs fall (not fielded in 2024)²⁴

58%

report their organization is allocating net new budget (without reducing other budgets) to fund gen AI investments (vs. 61% in 2024)²²

48%

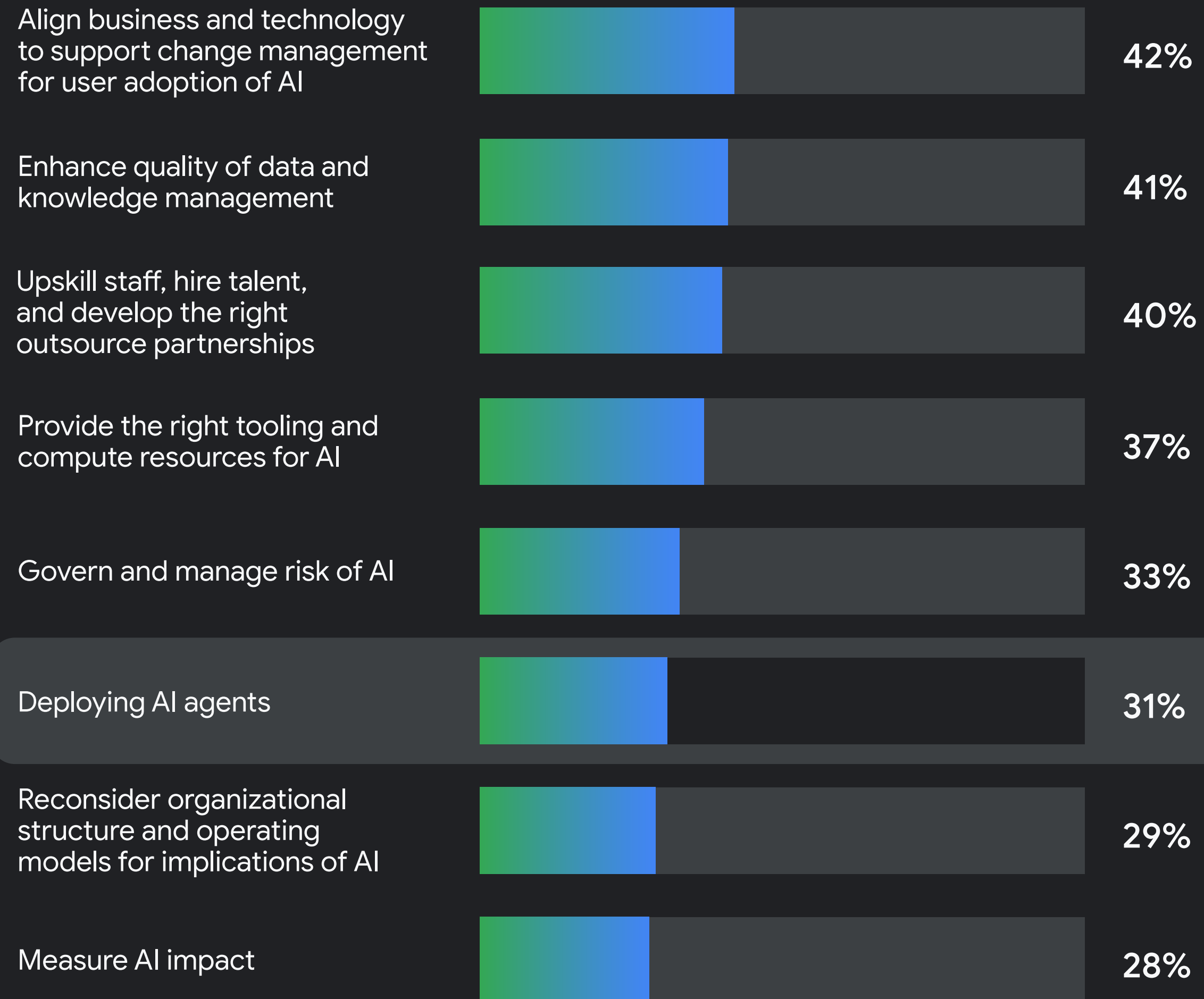
are reallocating non-AI budget to fund gen AI investments (vs. 44% in 2024)²²

²² Total (global): 2024: n=1539, 2025: n=3466; Question: What is your approach to funding gen AI?

²³ Total (global): 3315; 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.

²⁴ Total (global): n=3466; Question: Did the decreasing costs of AI technology (model training and operating) change your spending on gen AI?

Top investment areas to accelerate AI adoption



Total (global): n=3466; Question: Which of the following are the top 3 areas of investment to accelerate gen AI adoption within 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.²⁵

²⁵ 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: In what timeframe do you expect gen AI to deliver 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 2025²⁶

“



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.”



Anaterria 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.^{*27}

^{*} 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

2024



Orgs with comprehensive C-suite sponsorship



Orgs without comprehensive C-suite sponsorship

2025



Orgs with comprehensive C-suite sponsorship



Orgs without comprehensive C-suite sponsorship

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?

²⁶ Executives who report their organization has comprehensive C-level sponsorship and clear corporate vision for gen AI objectives: n=1269; Question: In what timeframe do you expect gen AI to deliver ROI to the following areas of your business?

²⁷ Total (global): 2024: n=1539, 2025: n=3466; Question: How is gen AI adoption connected to your organization’s business goals?

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 providers²⁸

“

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

²⁸ Total (global): n=3466; Question: Which of the following factors are MOST important to your company when considering LLM providers?

“



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.”



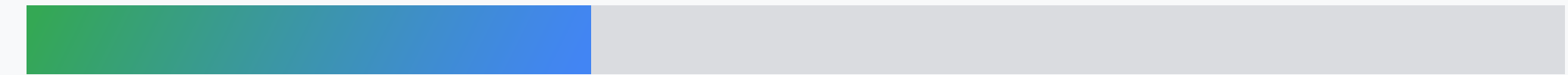
Natalie Bowman

Managing Director, Product & Experience Design,
Alaska Airlines



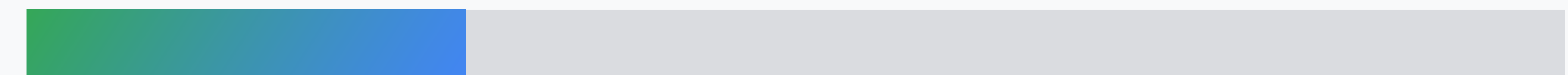
Top 3 factors in considering LLM providers

Data privacy and security



37%

Integration with existing systems



28%

Cost



27%

Total (global): n=3466; 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 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 and security 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.

Ready to see ROI from AI?

[Get in touch](#)

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