



GLOBAL RESEARCH

THE ROI OF GEN AI AND AGENTS 2026

The arrival of agentic AI finds early adopters
ready to build on initial success





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Gen AI Is an Enterprise Success. Next up: Agents

Several years of breathless hype and sharp derision have obscured the success of generative AI. We're told that LLMs can't count the Rs in strawberry, so they're useless. At the same time, they're so smart that they're going to take all our jobs. Every few months, headlines herald a new foundation model or breakthrough — sometimes impressive, sometimes a bit of a letdown. Every week, we get a new definition and timeline for artificial general intelligence. Or is “superintelligence” the current hypothetical hotness? It's hard to keep up.

Meanwhile, businesses have been experimenting with gen AI and putting their successes into production. They've been finding their versions of product/market fit, taking the “everything for everyone” promises of gen AI to make it deliver specific business value for specific teams within the organization. And while the broader industry narrative has often focused on the challenges, the high failure rates of pilot projects and the perturbations of the hype cycle, many early adopters are indeed reporting considerable success and a positive return on investment.

We saw it last year in the inaugural edition of this report. More than 90% of those who'd made the investment and laid the groundwork for generative AI reported positive ROI. Those who'd formally quantified their returns were averaging 41% — earning back \$1.41 for every dollar invested. Nearly a year later we surveyed another 2,050 organizations worldwide to get the latest word, and the word is (still) good:

- **92% of early adopters say they've seen a positive return on their gen AI investments.**
- **Among those who have quantified it, the return is 49% — a 20% increase over last year's research.**



We found that business leaders are most bullish on the returns of generative AI. Fully 75% of C-level respondents for nontechnical business orgs report a positive, quantified ROI, slightly higher than C-level technologists (70%) and noticeably higher than middle managers and senior individual contributors (53%).

Among all C-level leaders, only 5% report that returns on their gen AI investments have been flat, and a single C-level business exec reported that the investments had been quantified as negative.

75%

of C-level respondents for nontechnical business orgs report a positive, quantified ROI

Omdia by Informa TechTarget contacted 3,479 business and IT leaders across nine global regions, and found that 59% of organizations represented were already using gen AI and LLMs across multiple use cases. All findings and percentages in this report reflect aggregated responses from the 2,050 early adopters who reported involvement in AI planning and purchases, and ranged from senior individual contributors to C-level executives.

- 49% work in IT/cybersecurity
- 16% work in software development
- 9% work in data operations
- 25% work in other business groups (such as marketing, customer support, HR)

For full details, please see [Methodology](#).



Agentic AI is already heating up

For the past year or so, much of the AI buzz has focused on agents. Where once the conversation was about assistants that would turn a specific prompt into a specific output on command, the excitement now is about AI systems that will have greater autonomy, taking action within certain parameters, with minimal or no human supervision before the system decides to act.

An early example is customer support agents, which are evolving beyond a question-answering chatbot to be systems that can take action on a customer's behalf based on their input, account details and other factors. The most complicated or unusual issues will still bubble up to human staffers, but agents are proving to be an effective first line of service, faster and more efficient than queuing up for live agents.

While agentic AI solutions are not widespread, and those that exist are often not very complex yet, our research shows that agents are already gaining traction among early gen AI adopters:

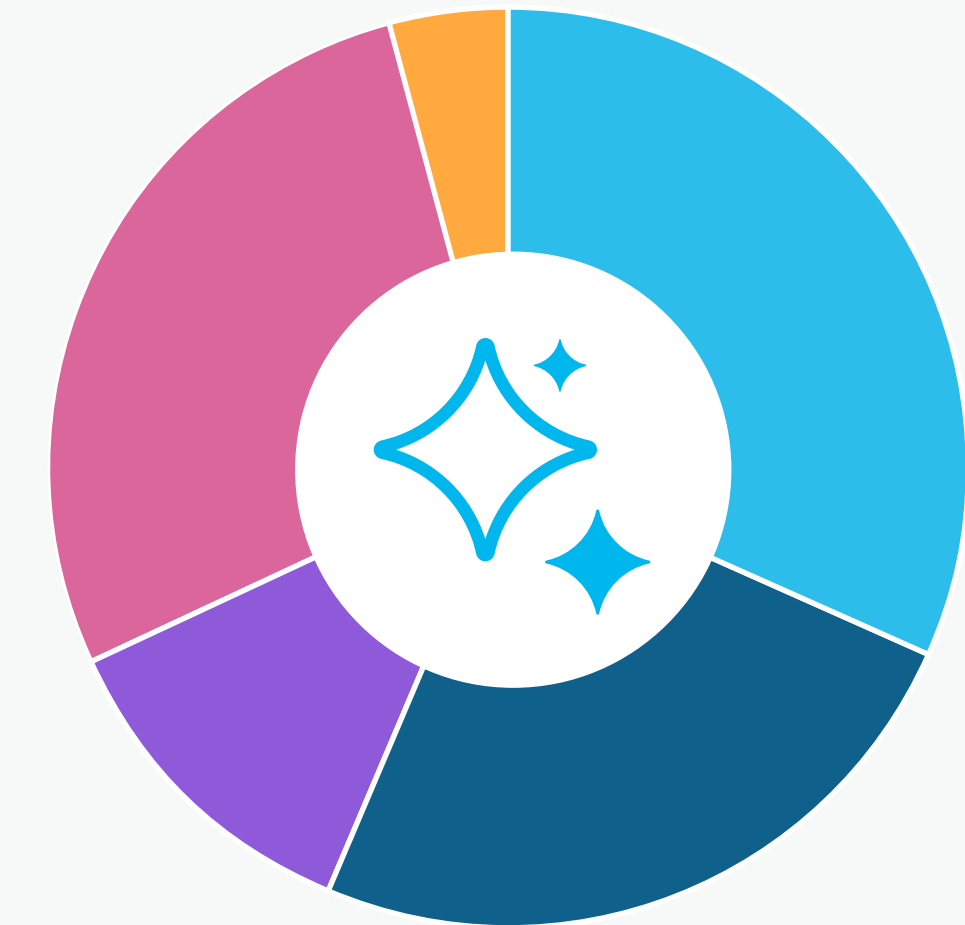
- 32% of respondents say they have agentic solutions in production today.

It is not surprising that early adopters of gen AI are taking their learnings to the agentic level. But it is significant, in that more tech-forward organizations may open up a sizable lead over competitors. Generative and agentic AI will [drive data flywheels](#) that accelerate growth and transformation for these leading adopters.

Respondents voiced concerns about agentic adoption, and we'll detail those in a later chapter. But what's notable is that, from a list of 10 likely concerns around investing in agents, the least-chosen option (at 19%) was "questionable return on investment." The takeaway is that respondents have their eyes open about challenges and the ongoing evolution of agentic tech, but they're overwhelmingly confident that there's a *there* there.

Executives in particular are bullish. These senior leaders, on average, expect a return of 47% on their agentic investments over the next 12 months — very much in line with the results reported from their initial gen AI efforts.

Active users of gen AI describe their plans for, or use of, AI agents



32%

Leveraging agentic AI in production today

25%

Definite plans, likely to deploy in next 12 months

12%

Definite plans; unlikely to deploy in next 12 months

28%

Interested, but early in the adoption process

4%

No plans or interest



Gen AI challenges persist

The pivot to agentic enthusiasm does not mean that gen AI is now considered child’s play. Respondents acknowledge continuing challenges. While nearly every organization surveyed reports that gen AI is returning value, 96% reported that they grapple with significant issues:

- **Data quality and quantity: 40%**
- **Employee expertise or skill: 35%**
- **Integration with existing or legacy systems: 31%**
- **Scalability and performance: 27%**
- **Cost: 24%**
- **Ethical or regulatory considerations: 24%**
- **Algorithmic transparency or understanding limitations: 23%**
- **Monitoring for misuse: 21%**
- **Use case identification: 20%**
- **Solutions’ or vendors’ immaturity: 18%**

In total, 79% of respondents reported one or more technical or data-centric challenges, 63% reported one or more organizational or resourcing issues, and 56% reported at least one challenge related to governance and compliance. A tiny but happy cohort of 4% responded “none of the above.”

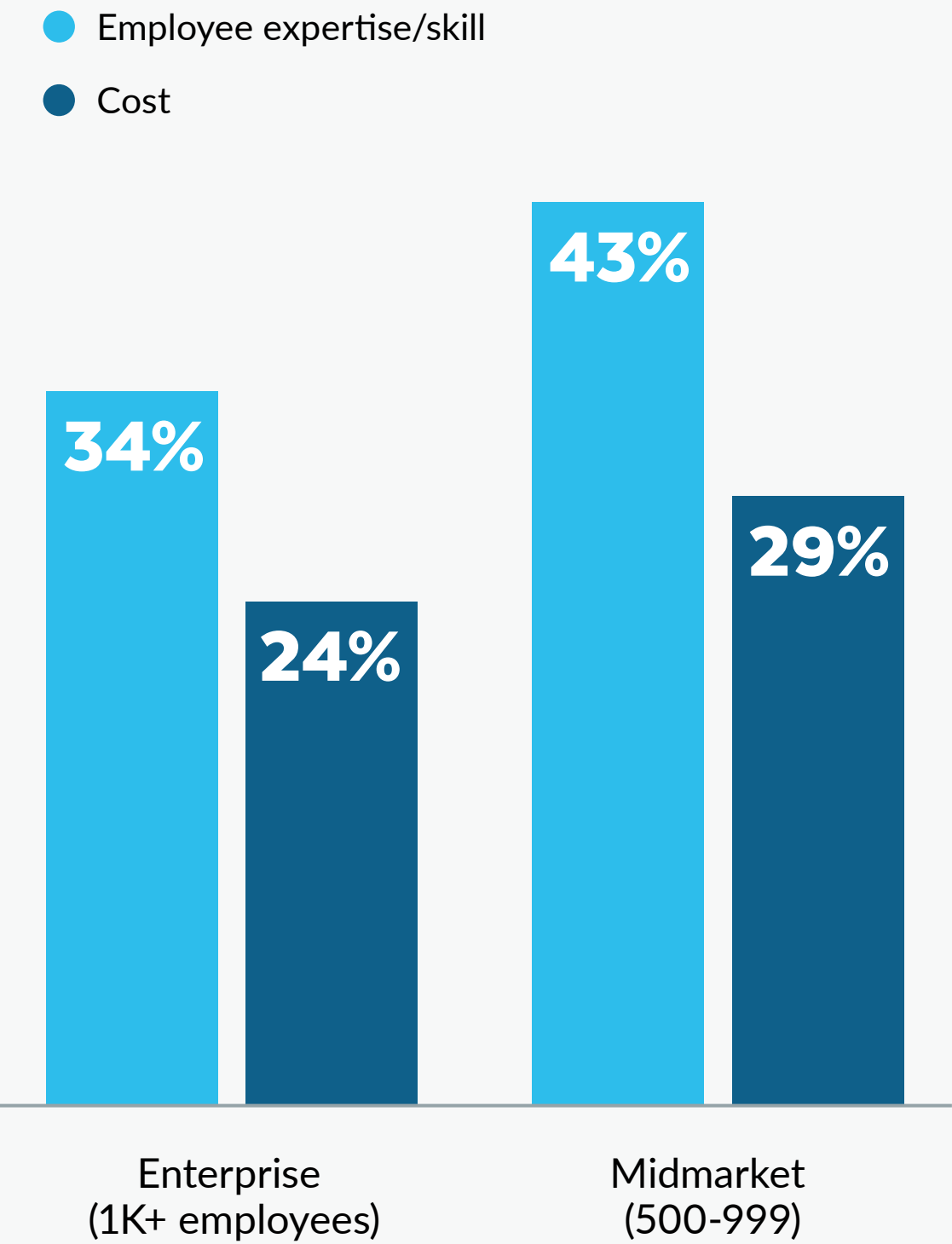
Closer examination of the data reveals a few more granular insights: First, lack of employees with the right expertise is a significantly larger problem for midmarket companies (500-999 employees), compared to enterprises (1,000+ employees). Forty-three percent of midmarket companies cited a talent shortage, compared to only 34% of enterprises. That makes sense, since enterprises can often attract talent by offering the best compensation and the most interesting technical opportunities.

But that doesn’t mean there’s no way for smaller organizations to catch up. We also found that, across all company sizes, those that are further along with gen AI adoption have less trouble with talent. Forty percent of companies still only having their initial gen AI solutions in production cite employee skills as a challenge, compared to 33% of businesses with many active gen AI use cases.

The promise there is that as companies work through the initial challenges of generative and agentic AI, they not only acquire the skills through doing, but also may become a stronger magnet for talent as the company expands its ambitions.

Two issues are particularly challenging for smaller businesses, which cite them more often than larger enterprises

Gen AI Challenge





Gen AI Becomes a Goal-Focused Value Driver

Last summer, a report from MIT's NANDA project triggered a lot of negative headlines about gen AI because of a topline finding that 95% of pilots do not return value to the P&L sheets. "Gen AI is a failure" was the tenor of a lot of the coverage, though the research was more nuanced.

As the [Harvard Business Review](#) and others noted at the time, the report found that generative AI was successfully improving worker productivity, but in ways that were hard to specifically quantify on the balance sheet. The report (available [here](#), registration required) also noted two particular points of failure on the part of enterprises working with gen AI: First, companies were investing most in sales and marketing, despite the better returns being in back-end automation; and second, the point of failure was more often in integrating gen AI solutions into existing systems and infrastructure, rather than the tech itself not working.

In other words, companies in that research cohort were not pursuing the best goals to achieve immediate bottom-line value, and were struggling to work a successful technology into their

broader ecosystem. In our focus on understanding the success of early adopters, we found that their high sentiment around ROI, and their higher measured returns, were accompanied by smart goal-setting and focus.

Consistent with our 2025 report, we found that the top three drivers of gen AI adoption were better operational efficiency, more innovation and improved customer experience. Respondents strongly indicated that they were succeeding at meeting those goals.

- 51% of respondents cited operational efficiency as a top goal. Overall, 88% of all respondents report material improvements in efficiency as a result of their gen AI efforts.
- 44% said they wanted gen AI to drive innovation outcomes, and 83% of all respondents say they've seen measurable improvement.
- 40% sought better customer experience, and 84% of all respondents say they've achieved it.

C-level business leaders, who should have the most holistic awareness of the business, are most bullish about gen AI outcomes

Value achieved:

Make better, faster decision



Improve innovation outcomes



Reduce costs



Manage risk



Improve financial performance



● C-level (business)

● Middle managers and individual contributors



Where gen AI shows up most

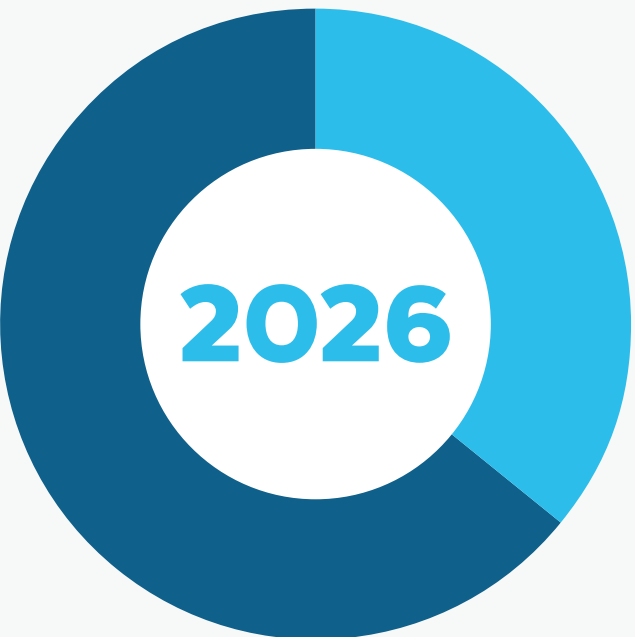
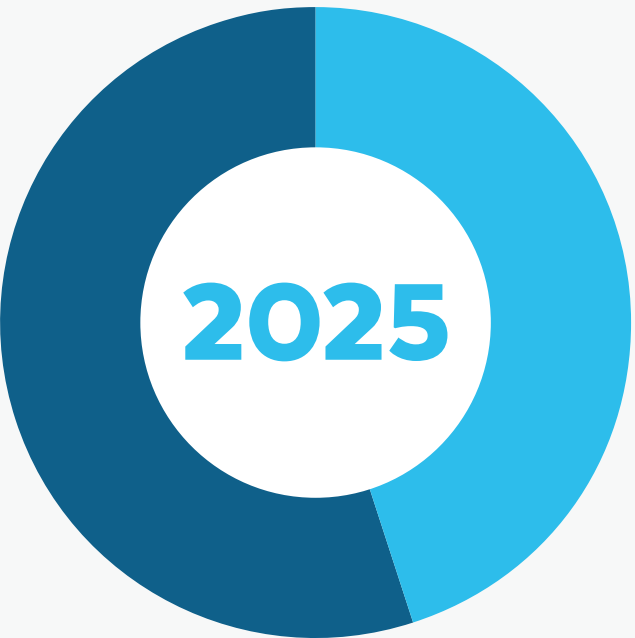
The story this year, in terms of where gen AI efforts are being focused, is in how widely the technology has penetrated respondents' organizations. The teams most often using gen AI solutions in production today, largely mirroring last year's results, are:

- ITOps (62%)
- Data analytics (59%)
- Cybersecurity (53%)
- Software development (50%)
- Customer service (49%)

What's most interesting, though, is that even for areas where usage of gen AI is lowest, such as sales and procurement, more than 30% of respondents say they have gen AI tools in production. In fact, the average respondent reported that their organization uses gen AI in roughly five business orgs.

On the following pages, we'll look a little closer at how several key teams use gen AI.

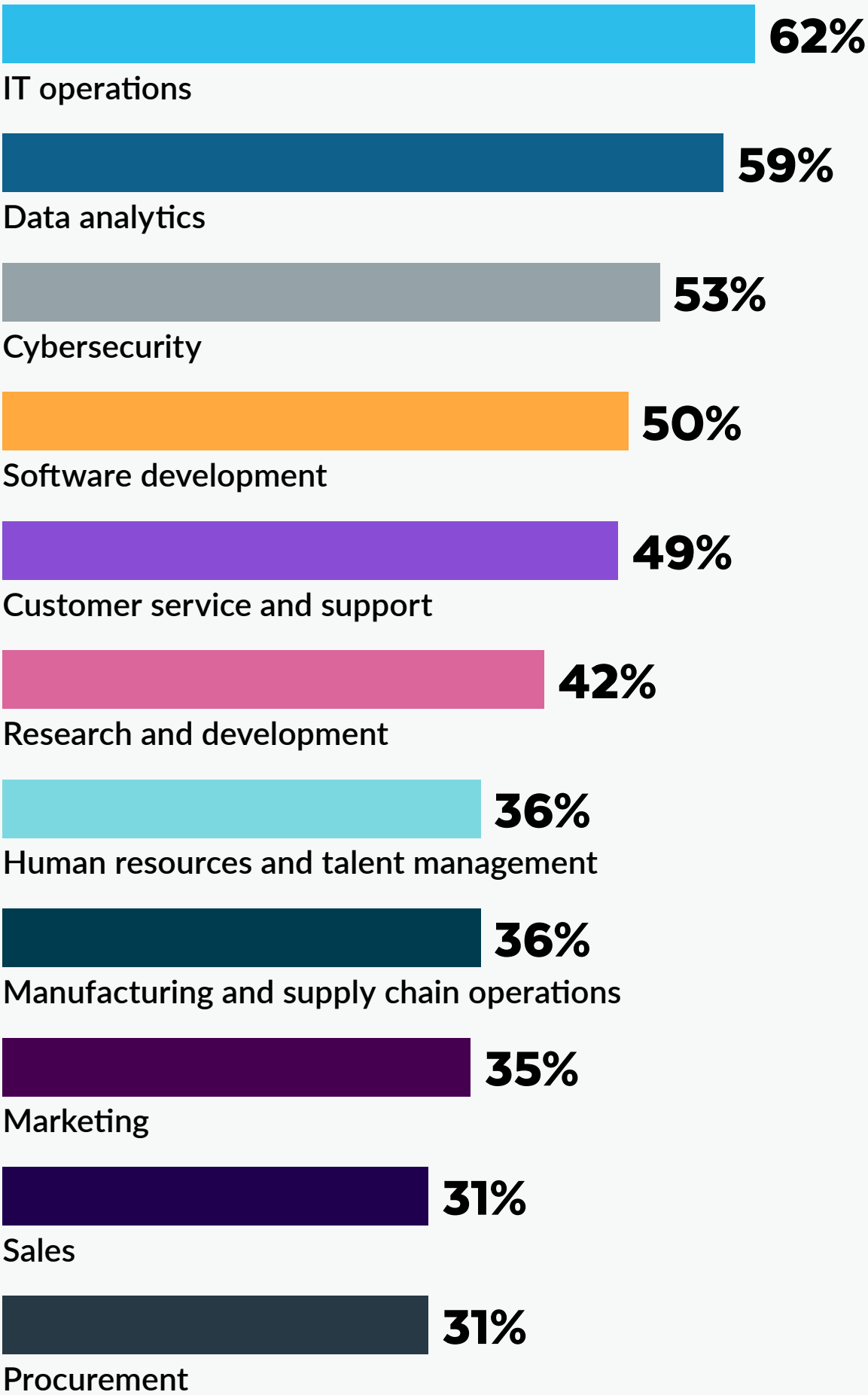
Where respondents direct their gen AI investments



- Customer-facing (outward)
- Employee-facing (inward)

Perhaps reflecting greatest value, ease of implementation or least risk, respondents in our current research are more likely than a year ago to pursue inward-facing, employee-centric applications of gen AI.

Where respondents have gen AI in production today





IT, dev and cybersecurity

Technical use cases are, unsurprisingly, the areas in which generative AI is making the biggest mark. Helpdesk automation (tied for leading IT use case, found at 61% of organizations) is helping IT teams triage issues, improve self-serve resolutions and escalate more complex issues to the right specialist. Also noted by 61% of respondents: compliance monitoring and reporting. Solutions may summarize dense regulatory text, monitor transactions and communications to detect potential noncompliance, and automate report generation. Trailing these leading uses were infrastructure configuration, log analysis and incident response.

A clear majority of respondents in IT/security roles also report success resulting from these gen AI deployments:

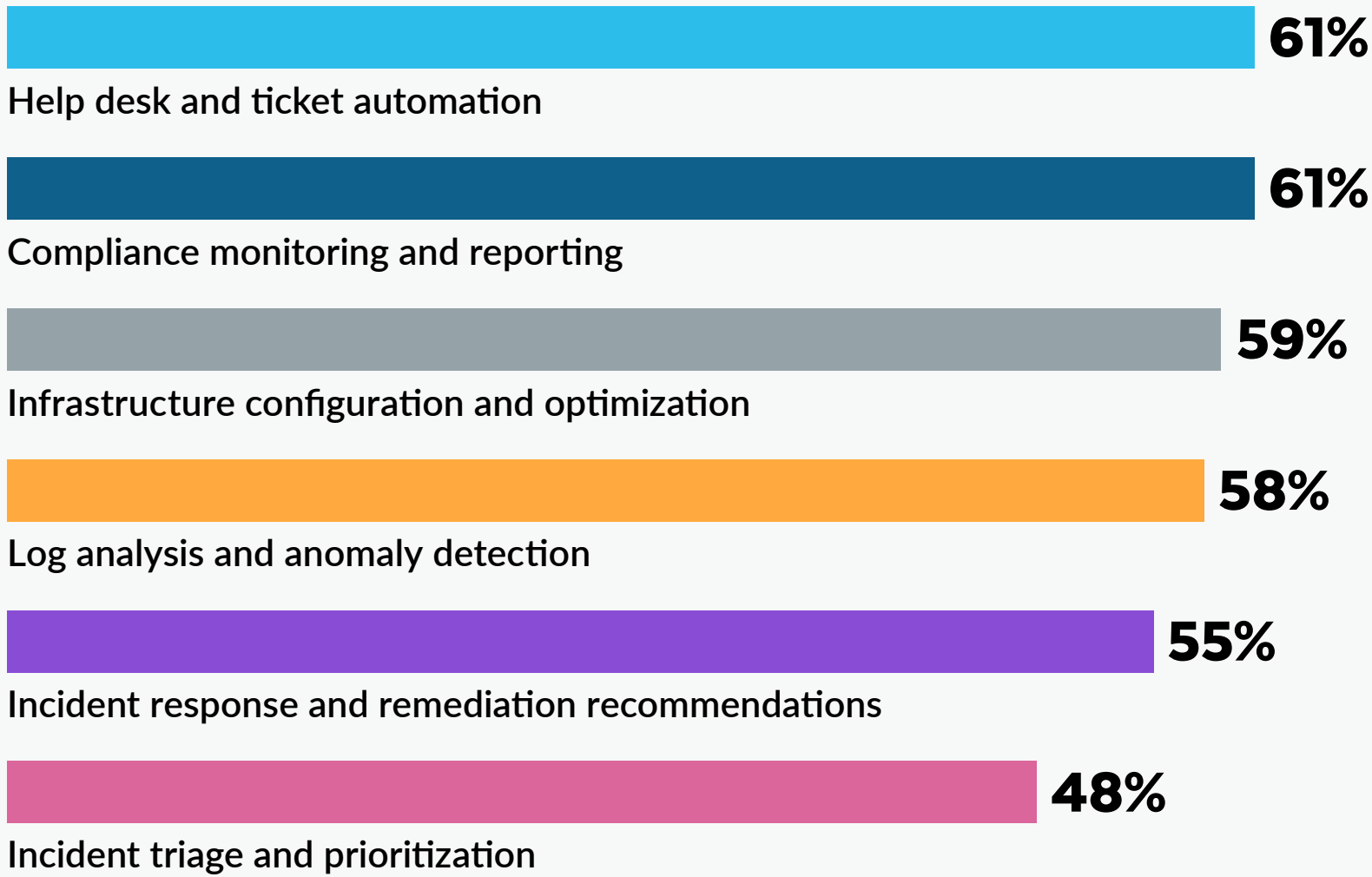
- 80% report increased application uptime
- 79% say they've reduced their cybersecurity alert backlog
- 78% have accelerated helpdesk resolution times
- 77% report reduced enterprise risk

Among developers, results are similar. The leading uses of gen AI are analytics and reporting (71%), code reviews (66%) and code generation (65%). Developers report positive results from these applications of generative AI:

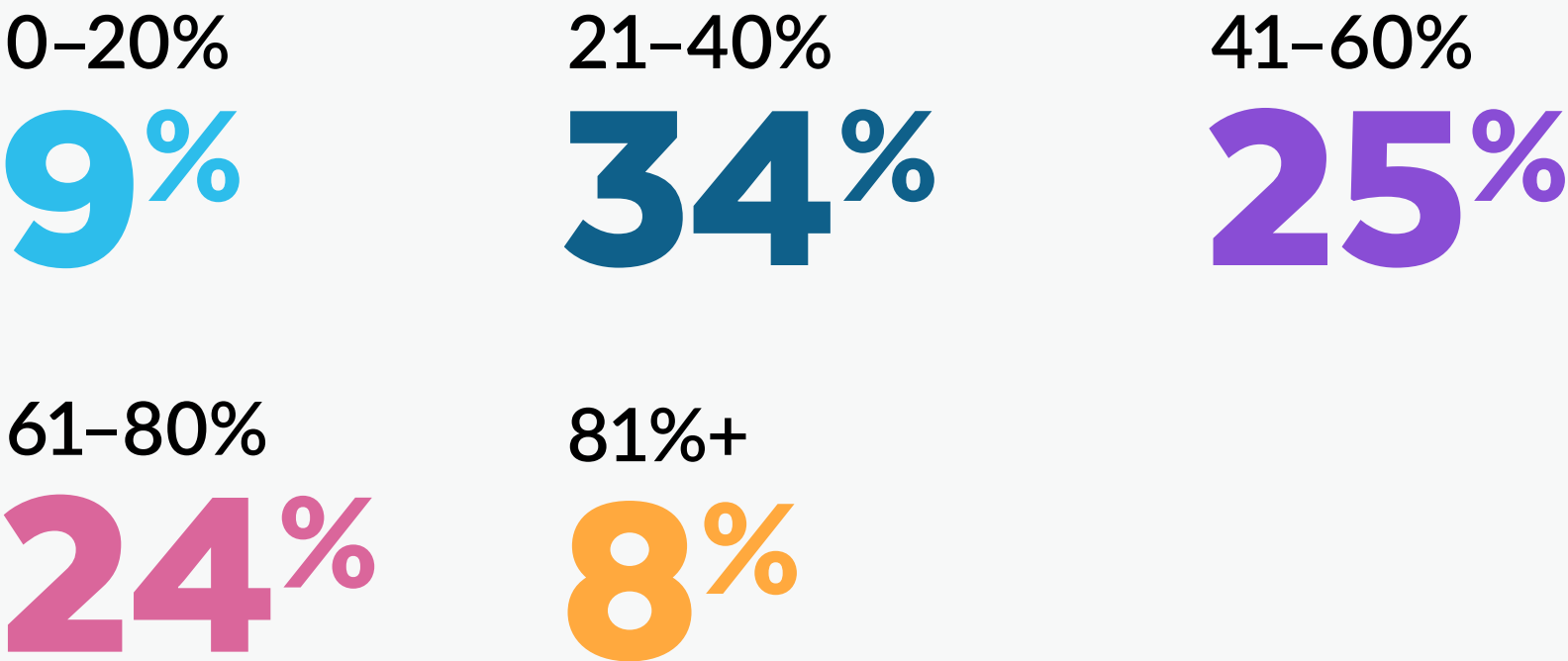
- 82% say they've improved code testing
- 82% report better bug detection/resolution
- 80% report better code quality
- 80% report faster development velocity
- 76% cite reduced development costs

Further, on average, respondents estimate that nearly half of the code their organizations produce, 48%, is written by gen AI systems.

IT/cybersecurity use cases currently being pursued with gen AI



Percentage of code being written by gen AI at respondent orgs today





Analytics and data engineering

From the start, analytics has been held up as a great fit for gen AI. “Democratizing data” would let nontechnical users ask questions of an AI interface in natural language, which could free technical teams from translating plain-language questions to coded queries, letting them pursue more advanced work. But that democratization trailed investments in the data engineering back end:

- Data visualization creation (74% of respondents)
- Automated data prep (74%)
- Pipeline creation (61%)
- Synthetic data creation (58%)
- Providing nontechnical users access to insights via conversational interfaces (36%)

That result parallels the finding that more organizations were investing in internal, rather than customer-facing, use cases. If you think of the business user as the customer of an analytics team, it makes sense that technical teams would be wary about accuracy and data security, and would concentrate first on back-end, technical uses — which help create a foundation of current, secure, well-governed data on which to build better outward-facing services.

Customer support

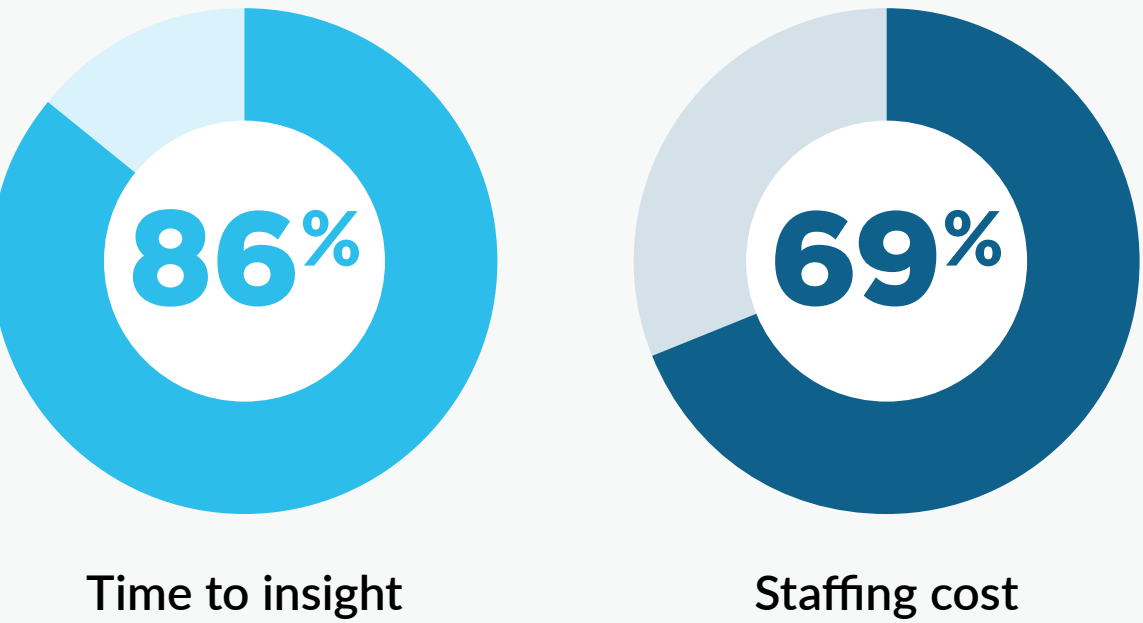
That’s not to say that external use cases haven’t been successfully embraced. Perhaps the most commonly cited outward-looking use of gen AI is customer support: chatbots that interact with customers to resolve initial queries and route more complex issues to human agents, who may be further assisted by gen AI tools.

The 49% of respondents using gen AI for customer support use the tool both to serve customers directly and to help on the back end.

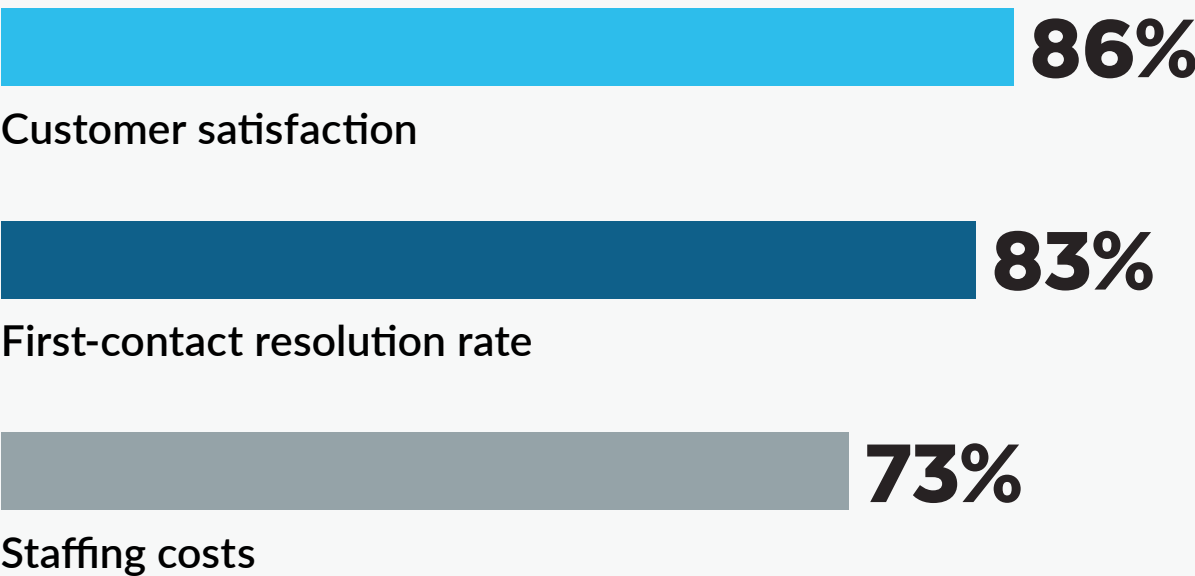
- 24/7 first-line response (61% of respondents using gen AI customer support)
- Guiding customers to relevant documentation and self-help resources (59%)
- Real-time agent-assist tools (59%)
- Ticket classification, prioritization and routing (54%)
- Multi-step troubleshooting and issue resolution (53%)
- Multilingual customer support (50%)
- Proactive issue identification (48%)
- Sentiment analysis and escalation (42%)
- Post-interaction follow-up (41%)

Satisfaction with gen AI in customer support is very high. Most significantly, 86% report higher customer satisfaction. And 73% report improved staffing costs, suggesting that generative AI is not only augmenting human agents, but in some cases, replacing jobs or reducing work shifts.

How use of gen AI has improved data analytics



How gen AI has improved customer service and support





Understanding Infrastructure Challenges

Consistently in this research, respondents indicated that the challenges they faced were not with the gen AI and agentic technologies themselves. Rather, two core areas are presenting most of the obstacles: Talent and data infrastructure.

Looking at infrastructure, respondents tell us that it's very hard to get their data estates in order:

- 65% say it is challenging/very challenging to break down AI data siloes.
- 62% say it is challenging/very challenging to measure and monitor AI data quality.
- 62% say it is challenging/very challenging to prep data to be AI-ready.

And it is worth noting that for each, the percentage who rate these operations as “very challenging” has increased year-on-year.

In general, the challenges around data remain significant: On average, respondents say that only 20% of their unstructured data assets are “AI-ready.” And structured data isn't faring that much better. On average, organizations say only 32% is AI-ready,

with 20% saying that more than half their structured data is AI-ready. In last year's report, only 11% of organizations said that more than half of their unstructured data was AI-ready, and in the current research, only 7% say the same.

Getting that data ready is important. A diverse range of proprietary data is necessary to refine the performance of LLMs and empower agentic AI to make smart, timely decisions. Realizing this, 92% of respondents say they are training, tuning or augmenting LLMs with their proprietary data. Though very high, this number is down slightly from 96% a year earlier.

The types of data in use represent a broad spectrum; 95% are using structured and semistructured data types, such as databases and spreadsheets, and 91% are using unstructured data, such as audio, video and images.

Only 7%

of respondents say that more than half of their unstructured data is AI-ready.

Data infrastructure challenges that are “very challenging”

Challenge

Breaking down data silos / integrating data



Prepping data to be AI-ready



Measuring and monitoring data quality



Enforcing data governance



Meeting storage and compute requirements



● C-level (business)

● Middle managers and individual contributors



A strategic consensus emerges around how organizations are handling the multifaceted data and infrastructure challenges: Virtually every respondent agreed/strongly agreed with two statements:

- We are actively investing in solutions to unify and consolidate our data estate
- Data engineering is the key capability needed to ensure AI projects are successful

These statements represent a fundamental understanding of what we’re dealing with when we’re dealing with generative AI: The inner workings may be a bit mysterious, but it’s not magic. The classic data analytics rule of “garbage in = garbage out” applies in spades. “Garbage” applies not only to incorrect data, but to incomplete data, such as when a key source is missing from an analysis. And the standard values of data management still pertain as well. Siloed and duplicated data is harder to keep track of, and harder to govern and secure.

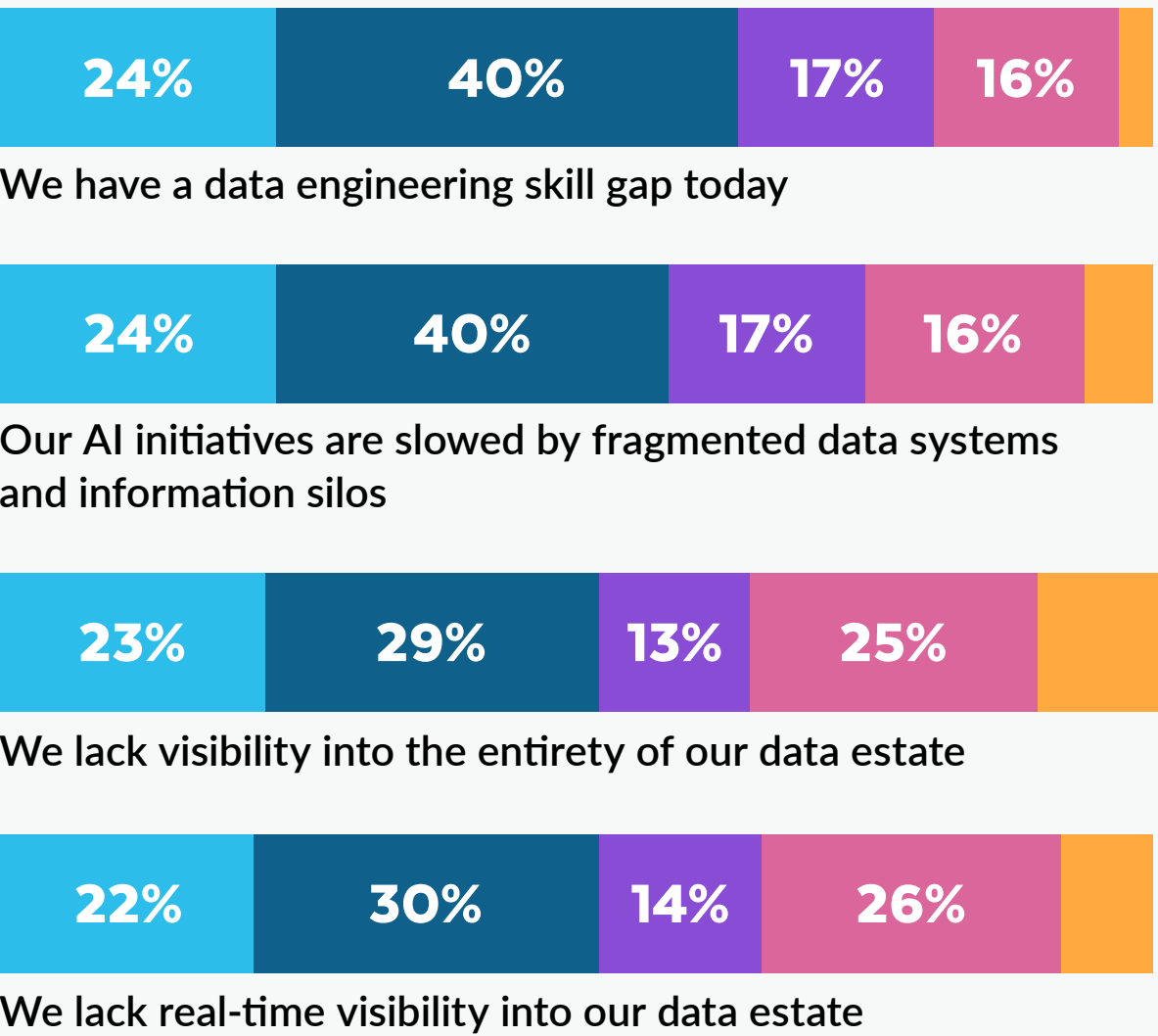
The first step of any data strategy, then, becomes all the more essential to AI initiatives: Establish a unified, secure, well-governed data platform to eliminate fragmented data and disparate formats. This helps ensure that all analytics outputs, including those produced with generative AI, are more accurate, consistent and actionable.

And if you’re going to unify your data on that single platform and make sure that all new data is brought in correctly, you need good data engineers to do the heavy lifting: designing, building and maintaining robust data pipelines.

Creating that unified data estate and empowering data engineering helps assure that AI can operate at scale and deliver return on investment.

Problems

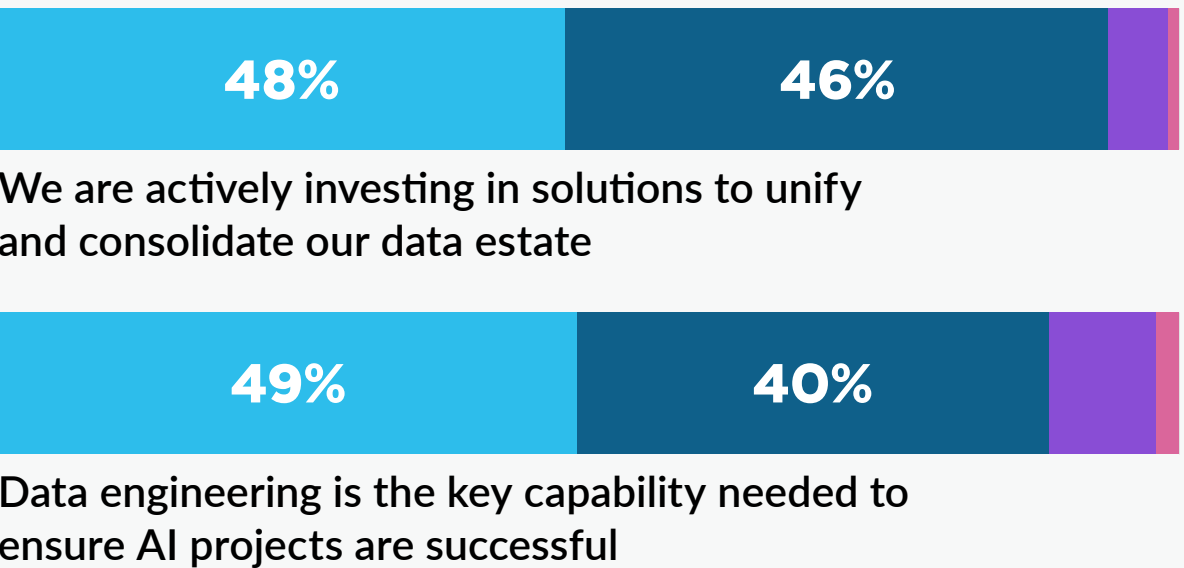
Challenge



- Strongly agree
- Agree
- Neutral
- Disagree
- Strongly disagree

Solutions

Strategies



- Strongly agree
- Agree
- Neutral
- Disagree
- Strongly disagree



Investing in the Gen AI Future

All this solid ROI and high percentage of success does not mean that implementing generative AI is all gain, no pain. Taking new technology from possibility to pilot to production is always a fraught process. There are wrong turns and unexpected costs. There are new skills to acquire and steep learning curves. The gen AI adopters in this survey were clear-eyed about the hurdles they've faced.

As noted earlier, 79% of respondents reported at least one data or tech-related challenge, 63% noted organizational or resourcing challenges, and 56% had struggles with governance and compliance. And problems increase cost.

Nearly everyone — 95% — said that at least one component of their gen AI solutions had run over budget. Most often, it was data storage and compute costs (according to 60%), and supporting software such as logging, monitoring and developer tools (55%). But in a positive sign, four of the five costs measured in the survey declined year over year by four to eight percentage points. That's progress. The only area that didn't decline was cost of talent, which remains in high demand.

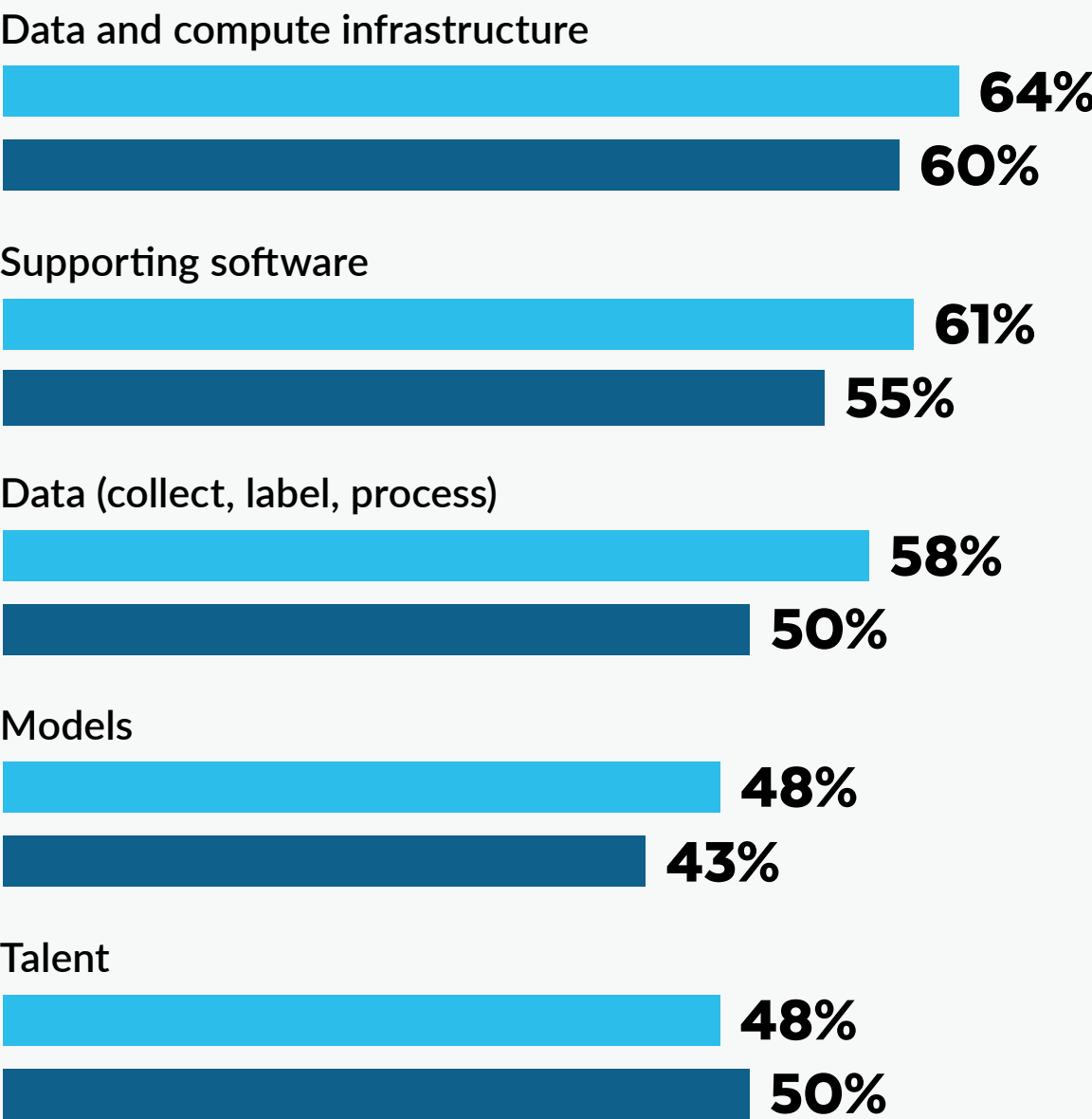
On average, organizations expect about 22% of their technology budget for the next 12 months to go to gen AI projects. This is consistent with the findings of last year's report (23% of budget). Asked about key areas where investment needs to increase, the top choices were:

- Data and compute infrastructure like GPUs, servers and storage (60%)
- Supporting software that keeps gen AI models performant and compliant, such as logging, monitoring, observability and so on (61%)

Early movers on gen AI are outpacing their peers in terms of investment: Those already using gen AI for many use cases estimate that their efforts will consume 25% of their technology budget over the next 12 months, versus 16% among those just getting started.

Where organizations see cost overruns.

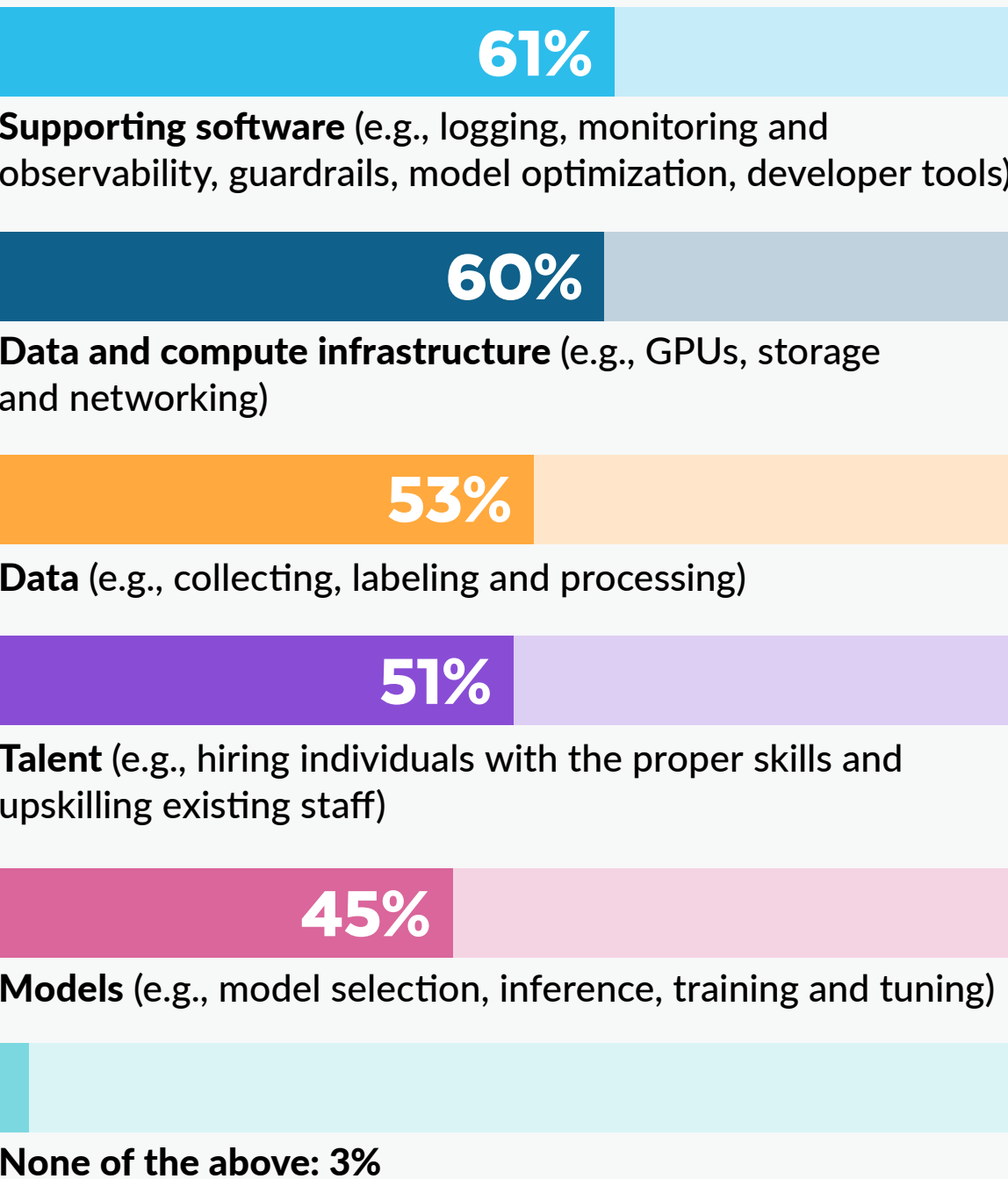
AI component:



- 2025: Cost overrun
- 2026: Cost overrun

Where respondents say more investment is needed

Area of investment:





The Impacts of Gen AI on Jobs and Productivity

While our surveys have consistently found enthusiastic and quantified ROI among early adopters, other research has come at the question from different angles. Where those researchers have struggled to find positive ROI, they have found that a lot of generative AI applications affect employee productivity, and incremental productivity gains, even when cumulatively impressive, can be [difficult to quantify](#) on the balance sheet.

An academic at UC Berkeley [dryly notes](#) that the search for instant ROI can sometimes be wrong-headed: “When the internet emerged, organizations didn’t abandon it because quarterly earnings didn’t immediately spike.” His report concludes that value is there, but organizations are looking in the wrong places: “We’re not experiencing an AI failure; we’re experiencing a measurement failure.”

In addition to asking organizations about actual ROI from gen AI and early agentic efforts, we addressed that key area of potential advantage: productivity gains. As noted earlier, software developers report being more productive, and KPIs such as accelerated resolution times for IT and customer support tickets indicate greater organizational efficiency.

And we also quizzed them about the often-feared outcome of AI taking on human work: job loss. For some disciplines, such as data engineering and analytics, reduction in staffing costs was

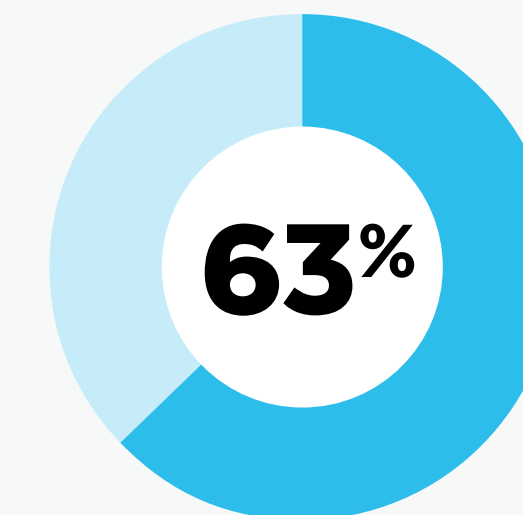
identified as a benefit of gen AI initiatives. Across the board, the research found that the teams most often experiencing job loss due to gen AI in the past year were:

- IT operations (40%)
- Customer service/support (37%)
- Data analytics (37%)

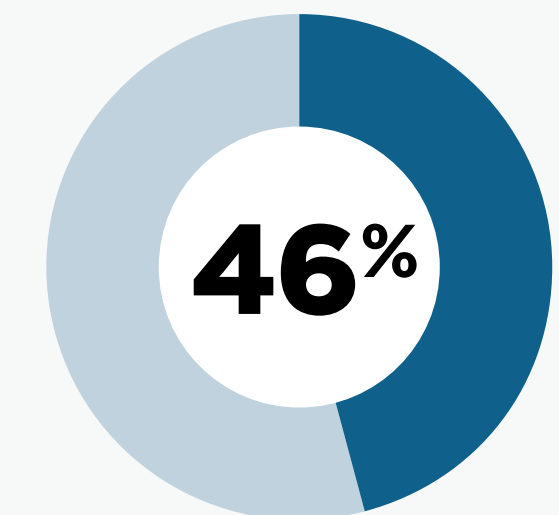
In terms of role, the most job loss was seen at the entry level (63%) and among middle management (46%).

The hit to entry-level work tracks with findings from other research. A [paper from Stanford](#) last August reported that “early-career workers (ages 22-25) in the most AI-exposed occupations have experienced a 13% relative decline in employment even after controlling for firm-level shocks. In contrast, employment for workers in less exposed fields and more experienced workers in the same occupations has remained stable or continued to grow.” Research from the Brookings Institution, [published](#) in October 2025, echoed the Stanford findings: Broad job stability, with erosion at the entry level.

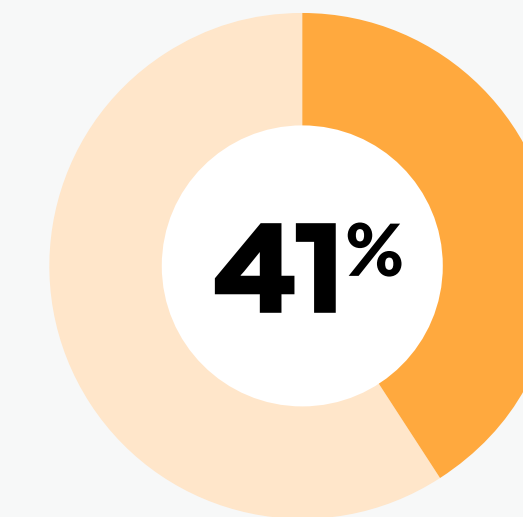
Percentage of respondents reporting loss of jobs in their organization for a given level of seniority



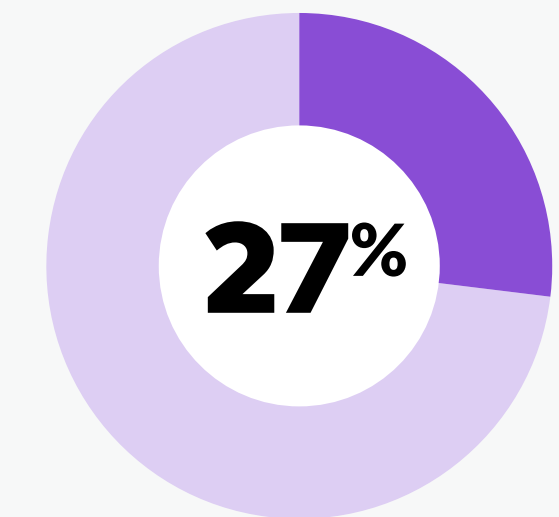
Entry level



Middle management



Senior individual contributor



Senior management



It’s also important to note that job destruction is not the only employment outcome of generative AI. Asked whether gen AI had driven job creation, job loss or both at their organization:

- 42% of respondents replied only that jobs have been created by gen AI.
- 11% responded only that jobs have been lost.
- 35% report that jobs have both been created and lost due to AI.
- 13% said that employment had not been affected by AI-powered automation.

Incorporating the “both” group into the reports of creation and loss, we can say that 77% of orgs reported some job creation, with or without accompanying job loss. Some 46% report job loss, with or without additional job creation. Looking at the 35% who say their business has seen both creation and loss of jobs, 69% of that group say there has been a net positive impact on employment.

In a hopeful sign for workers, the research suggests that as adoption accelerates, job gains increase. Seventy-five percent of organizations with many gen AI cases report that the net impact of AI automation on jobs has been positive, compared to just 56% of those organizations using gen AI for limited, initial use cases.

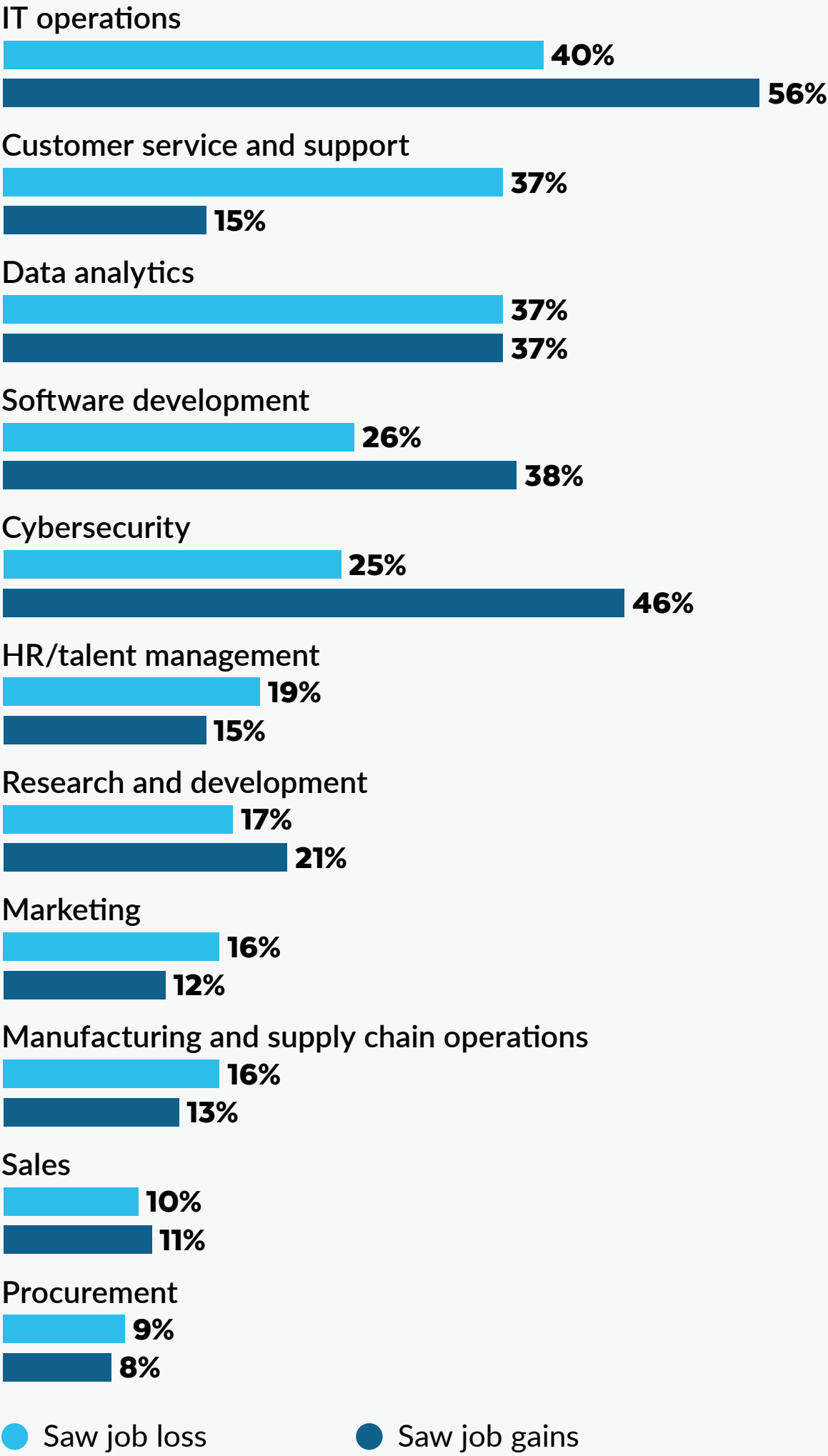
Assessing reports of job gains and losses by team, the most significant delta, in terms of job loss, are with customer service and support: 37% of respondents said these jobs had been cut in the past year due to gen AI, while 15% said jobs had been added.

Looking at job gains, the biggest winners are in cybersecurity (21 points more likely to report job gains), IT operations (16 points more likely to report gains) and software development (up 12 points). Most other teams’ reports of gains and losses fall within a few points of each other.

It’s important to note that the trends we’re seeing in these earliest days of the gen/agentic AI era will not necessarily continue without refinement. New strategies may emerge as organizational needs become clear. In the [Snowflake AI + Data Predictions 2026](#) report, Snowflake cofounder Benoit Dageville noted that, while coding agents are widely seen as a threat to junior-level coding jobs, such a trend would pose an unanswered question: Without junior software engineers, where does the next generation of senior engineers and managers come from?

“AI has arrived so quickly that we don’t yet know how the world is going to rebalance or reorganize itself,” Dageville said.

By team, percentage of respondents that most often report job loss and gain due to AI in the past 12 months





Enthusiasm for shadow AI continues

An additional challenge for many organizations is that employee enthusiasm for gen AI solutions seems to outpace official gen AI initiatives. The research consistently shows that respondents on business-side teams report more gen AI usage in their area than respondents on the technical side acknowledge. Shadow IT has fully evolved into shadow AI.

Unapproved AI use may involve an individual using an unsupported AI tool such as ChatGPT, incorporating results into their work output with no one the wiser. It may also include credit-card acquisitions as teams expense a SaaS subscription without IT approval. Among our respondents, IT staff seemed to be considerably underinformed about who's using gen AI:

- Marketing uses gen AI: 51% of marketers agree versus 37% of IT staff
- Customer support uses gen AI: 63% in customer support versus 51% in IT
- HR uses gen AI: 66% of HR staff agree versus 34% in IT
- Procurement uses gen AI: 72% of procurement staff agree versus 30% in IT
- Manufacturing and supply chain operations uses gen AI: 57% on those teams agree versus 35% in IT
- Sales uses gen AI: 54% on sales teams agree versus 31% in IT

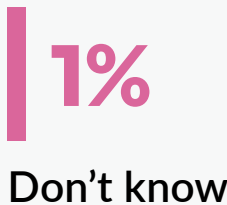
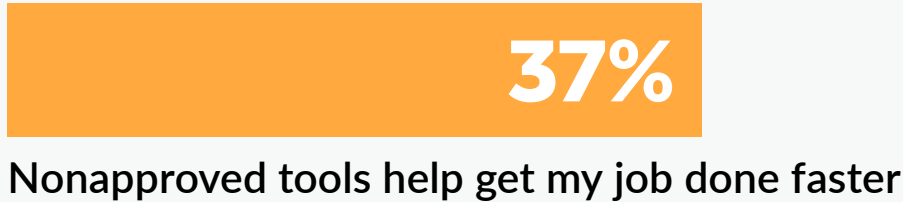
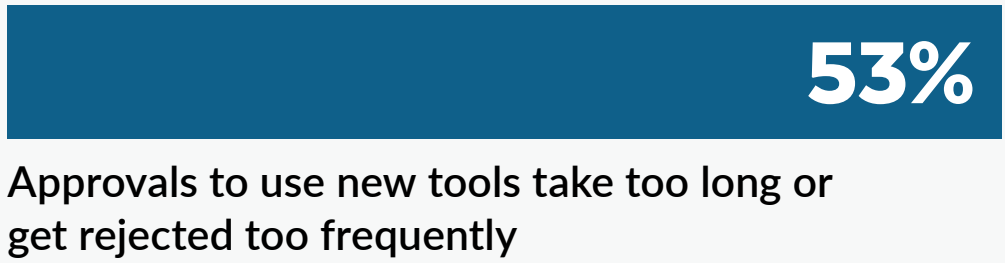
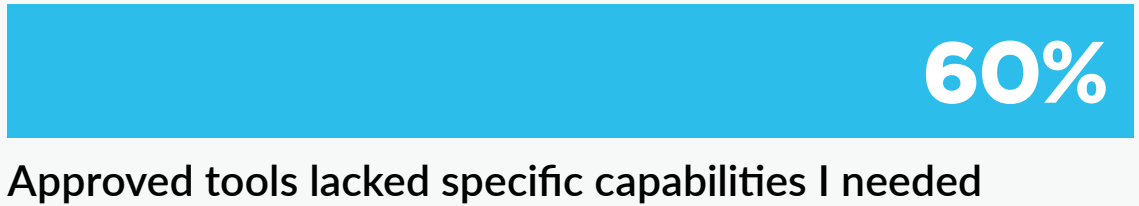
Unapproved use of generative AI tools carries considerable risks. Employees may put confidential data into an external model that then incorporates it into its training. They may violate compliance and governance standards and by using systems not geared toward their company's needs and trained on their company's data, they may be more likely to receive inaccurate outputs.

Perhaps surprisingly, the rebellious rulebreakers most often come from the executive ranks.

- 66% of C-level business leaders use nonapproved AI technologies
- 55% of tech-side C-level leaders report the same
- 56% of middle managers/individual contributors do so

Across the board, 57% of respondents acknowledge using nonapproved AI tools for work.

Why workers use nonapproved gen AI tools





Agentic AI: Early Adopters Chart Wins

Ask 10 people what an AI agent is, and you'll get at least eight definitions. We asked respondents to give us the word(s) that comes to mind when someone says "AI agent," and we got 2,047 replies. Leaders included autonomous, innovation, adaptability, reliability and decision-making. (There was some negativity as well. Fake, useless, controversial, hesitation and insecure were offered by one person each.)

For the survey, the following definition was given:

Agentic AI refers to AI systems capable of independent decision-making and autonomous behavior. These systems can reason, plan and perform actions, adapting in real time to achieve specific goals. They can learn, adapt and improve their performance over time and are increasingly used in fields like customer support, cybersecurity and business intelligence. Many agentic AI solutions interact with users and even other AI agents via generative AI interfaces.

Using that definition, 32% of respondents say that they have agentic AI in production today. Another 37% say that their organization has definite plans for agentic AI, and 8% report "early interest." Only 4% report no plan or interest in agentic AI technology.

Slicing the data by company size and depth of gen AI experience also reveals some deeper insights.

- **Enterprise scale organizations have the lead on agentic adoption:**
 - 34% of enterprise respondents are using these technologies today
 - 22% of midmarket organizations say the same
- **Early adopters of gen AI have the edge on agentic adoption:**
 - 44% leveraging gen AI for "many" use cases are also using agentic AI technology
 - Only 8% of organizations just pursuing their "initial" gen AI use cases say that they have agentic AI in production

Across the board, those on the leading edge of agentic adoption are already seeing improvements. More than four of five respondents at organizations using agentic solutions are seeing improvements in creative workflows (89%), customer experience (89%), strategic decisioning (88%), forecast accuracy and scenario planning (86%), and knowledge sharing within the organization (82%).



Respondents chose these words to describe agentic AI. The leaders were autonomous (473), innovation (298) and intelligence (207).

Of the 2,050 active adopters of gen AI who completed the survey, 32% (648) say they have AI agents in production. Researchers contacted a total of 3,479 organizations worldwide and found that 59% — 2,050 — had gen AI solutions in production. If we consider the 648 adopters of agentic AI against the total of 3,479, we find that among all organizations, only 19% are actively using agents already.



Goals and focus

One of the greatest concerns about the development of agentic AI is rapid job loss. Individual workers express fears for their own livelihood, and even Anthropic CEO Dario Amodei, a leader in the development of generative and agentic AI, has [warned of economic catastrophe](#) caused by sudden mass unemployment due to the imminent arrival of AI agents.

In this research, respondents were more often looking to agentic AI as a value-add technology, and less often as a means to eliminate jobs and reduce costs. When asked what business objectives their organizations are pursuing with agents, top responses were:

- Better data-driven decisioning (57% of respondents)
- Improved customer experience (54%)
- Faster innovation (51%)

Conversely, labor-cutting choices were the two least-cited goals:

- Removing humans from rote processes (40%)
- Removing humans from sophisticated processes (35%)

The urge to purge human workers came most often from C-level line of business leaders; 46% reported this as a primary goal, as did 34% of C-level technologists. C-level business leaders also most often say that it's very likely that tasks of their own will be executed by agents within a year (45% vs. 33% in the total dataset) and that it's very likely that their performance will be evaluated by agentic technologies (49% vs. 34% in the aggregate dataset).

They're definitely not the only ones. Across the research group, respondents said that agents will take on tasks that they and their direct reports currently perform.

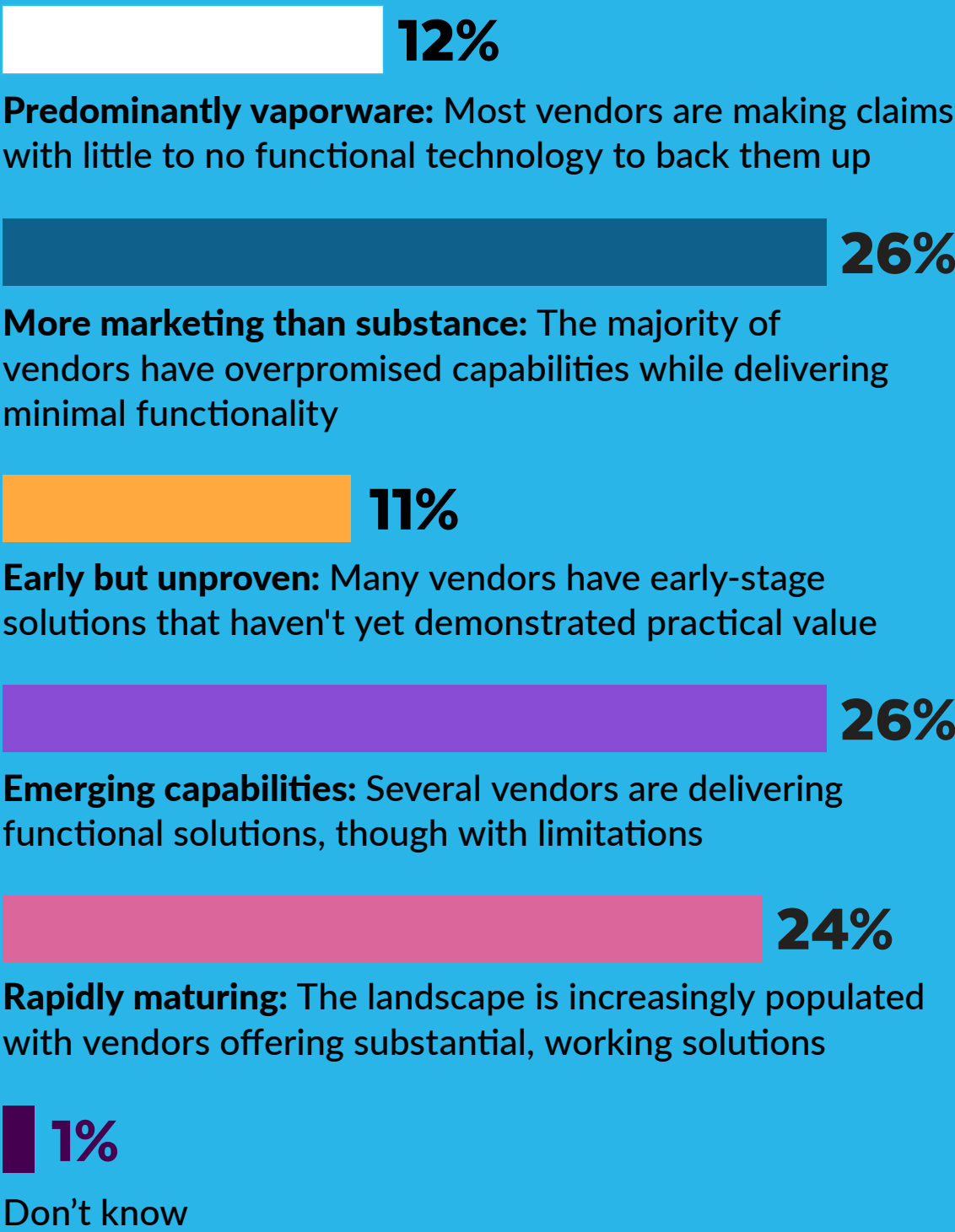
- 69% said it was likely that aspects of their jobs would be taken over by agents within the next 12 months.
- 71% said it was likely that tasks currently handled by their teams will be handled by agents.
 - 34% said it's "very likely" — a five-point increase over last year's report.

On average, respondents expect their orgs to be using agentic AI in production in about four different lines of business in 12 months. The organizational teams most expected to be using agentic AI in production operations within the next 12 months mirror those using gen AI today: ITOps (57%), data analytics (54%), cybersecurity (53%), customer service (46%) and software development (46%).

Executives have high expectations, betting on a 47% return on agentic investments within a year. Respondents generally are clear-eyed about the experimental nature of early agentic efforts: They estimate that 41% of agentic initiatives launched over the next 36 months will ultimately fail.

Shadow of a Doubt

Respondents are nearly evenly split about the current state of agentic offerings; 50% say agentic solutions are functional and maturing, while 49% rate them as somewhere between still unproven and mostly vaporware. As vendors improve their products, they may have to upgrade their storytelling, too.





Challenges and concerns

There are a lot of high hopes and wild uncertainties around agentic AI. Researchers asked respondents about their most pressing concern along three vectors: business concerns, tech worries and their expectations of the vendors providing agentic technology.

The five leading business concerns related to agentic AI are multifaceted, and all cited by just under a third of respondents.

- Job displacement (cited by 29% of respondents)
- Maintaining human oversight/preventing rogue actions by agents (29%)
- Concerns over data storage and use (29%)
- Agent errors/hallucinations (28%)
- Data breaches/agent exploitation (27%)

The least-often cited area of concern is questionable ROI (19%), indicating that most respondents ultimately believe the technology will deliver value.

Technology concerns center on tech debt and performant data infrastructure. Asked specifically to anticipate technical challenges associated with agentic AI, respondents noted:

- Interoperability issues (42%)
- Legacy system incompatibility (39%)
- Providing real-time data processing for agent decision making (42%)

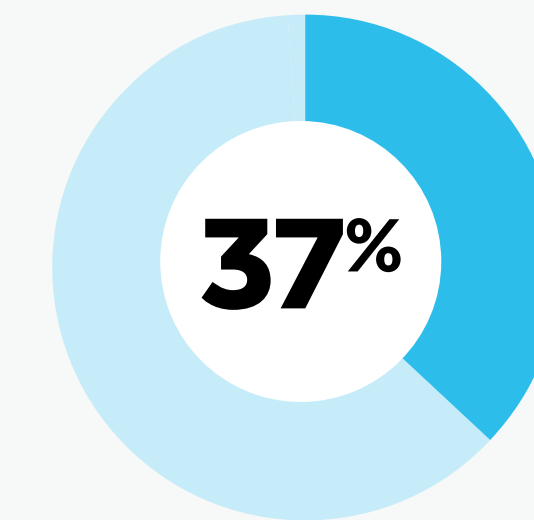
Clearly, organizations need to ramp up investments in data infrastructure designed for an agentic future. Overcoming these potential blockers will go a long way to determining the success or failure of early agentic efforts.

Organizations want vendors to make easy-to-deploy agentic solutions. When asked whether they prefer prebuilt agents than can be trained or the facilities to build agents themselves, three-fifths chose the former.

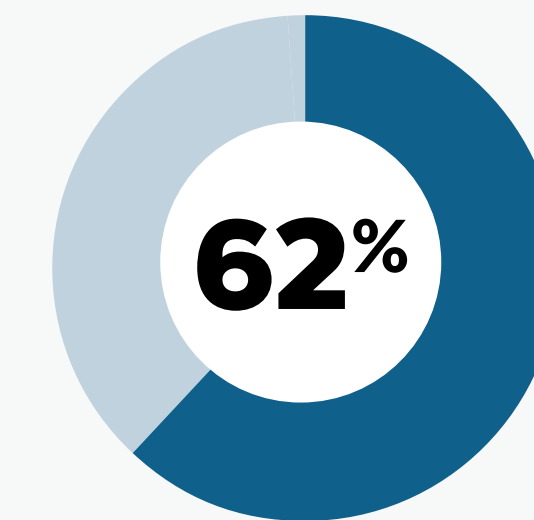
- Middle managers/individual contributors were the personas most likely to voice a preference for pre-built agentic solutions (66%), showing that those closest to implementation are even more apt to appreciate turnkey solutions.

None of these concerns are seen as insurmountable, as reflected in the relatively high confidence of eventual ROI. Organizations will have to prioritize data governance and embed proper human oversight, especially as agentic solutions are first proving themselves. If vendors deliver the prebuilt solutions that most respondents seem to crave, businesses should be able to accelerate deployment and mitigate roadblocks and hazards.

How respondents' orgs want to deploy AI agents



We want vendors to provide us a studio to build our own AI agents



We want vendors to provide us prebuilt AI agents that we can train with our data

1% chose "don't know"



Building on Success

Gen AI is a fundamental change that's already proving its value across the enterprise. Early wins abound, from measured ROI to enhanced productivity. But to achieve the real potential of generative and agentic AI, there's a lot more to be done.

The biggest AI challenges today revolve around accuracy and cost. Some of the gains here must come from the model makers. For instance, industry improvements in model memory and context management, improving how gen AI remembers and builds upon past interactions, will make agents and assistants more useful for complex, multistep tasks. But organizations can and must improve outcomes themselves.

In terms of accuracy, organizations must continue to improve their data estates, so that LLMs are trained with cleaner and more specialized data. Data teams will learn to establish stricter guardrails that will teach the models not only what to say, but what not to say — both in terms of brand voice and data security. Essentially, all the systems around the LLMs themselves are works in progress, and they must continue to improve.

On the cost front, while the industry will continue to find efficiencies, organizations will make a major shift toward specialized, smaller models. These purpose-built models cost less to build and operate.

The talent challenge must be addressed through a combination of education, hands-on experience and continuous trial and error. This isn't just an IT problem; it requires cross-functional teams to learn to work with the technology.

With all these improvements, organizations will be able to deploy agents that can handle greater complexity and will be more comfortable putting customer-facing agents into production. Consumer-facing agents that can shop for customers — making purchases and shipping arrangements — are already rolling out. And agents that triage cybersecurity anomalies and handle initial customer support interactions will increase in sophistication and success.

Over time, not only will the AI industry continue to improve its products, but AI-embracing organizations will learn better where to apply the technology, and how to streamline and transform processes to turn individual and incremental productivity gains into even greater revenue drivers.

It may be a bumpy ride, but it'll definitely open new horizons.



Industry Highlights

Advertising and Media, Financial Services, Healthcare and Life Sciences,
Manufacturing, Retail, Technology





Industry-Level Adoption Trends

This research identified and assessed 2,050 respondents at organizations with formal use cases for gen AI technology in production. However, to understand market penetration within key industries, we tracked the rate at which respondents failed to qualify and where their organization stands on the adoption curve. In total, researchers contacted 3,479 organizations worldwide to identify the 2,050 qualified adopters of generative and agentic AI. The chart on this page considers the percentage of adoption from the entire initial-contact cohort to give a clearer version of gen AI adoption in each represented industry.

As shown, the data implies that the advertising and media and the healthcare and life sciences industries lead on adoption, with the highest numbers of respondents claiming their organization uses gen AI for many use cases today (58% and 47%, respectively). Next, we see retailers and financial services companies as in the middle of the pack on adoption. Finally, we see manufacturers and (surprisingly) technology companies as the laggards in the group, though it is worth noting that even at the low water mark, 40% of tech-employed respondents report their organization has a formal use case in production.

How all initial respondents described their interest in and adoption of gen AI

	Advertising and media	Retail	Financial services	Healthcare and life sciences	Manufacturing	Tech	Other
For many use cases	58%	44%	42%	47%	37%	27%	40%
For initial use cases	12%	22%	22%	23%	26%	13%	23%
Definitive plans for use cases	16%	22%	20%	17%	20%	35%	20%
Interested; exploring use cases	11%	12%	14%	13%	16%	23%	15%
No plans/interest	3%	1%	1%	0%	1%	3%	2%



Advertising and media

The advertising and media industry seems to be ahead of the curve on gen AI adoption:

- Of all respondents starting the survey, those employed in advertising and media were the most likely to report that their organization leverages gen AI and LLMs for many use cases (83% versus an average of 66% across all industries).
- These organizations also lead other sectors in terms of ROI achieved, reporting a 69% ROI — \$1.69 earned for every \$1 invested — compared to 49% across all industries.
- Advertising and media respondents also report fewer challenges getting off the ground, such as data quality and quantity issues (cited by 27% versus a 40% all-industry average), but more often report issues indicative of growing pains, such as scalability and performance (35% versus a 27% industrywide average).

In terms of how these organizations are using gen AI technologies, they are more likely than the all-industry average to be targeting use cases that impact end customers (47% versus 36%) as opposed to employees. In this industry, gen AI is more commonly used by marketing (40% versus 35% generally)

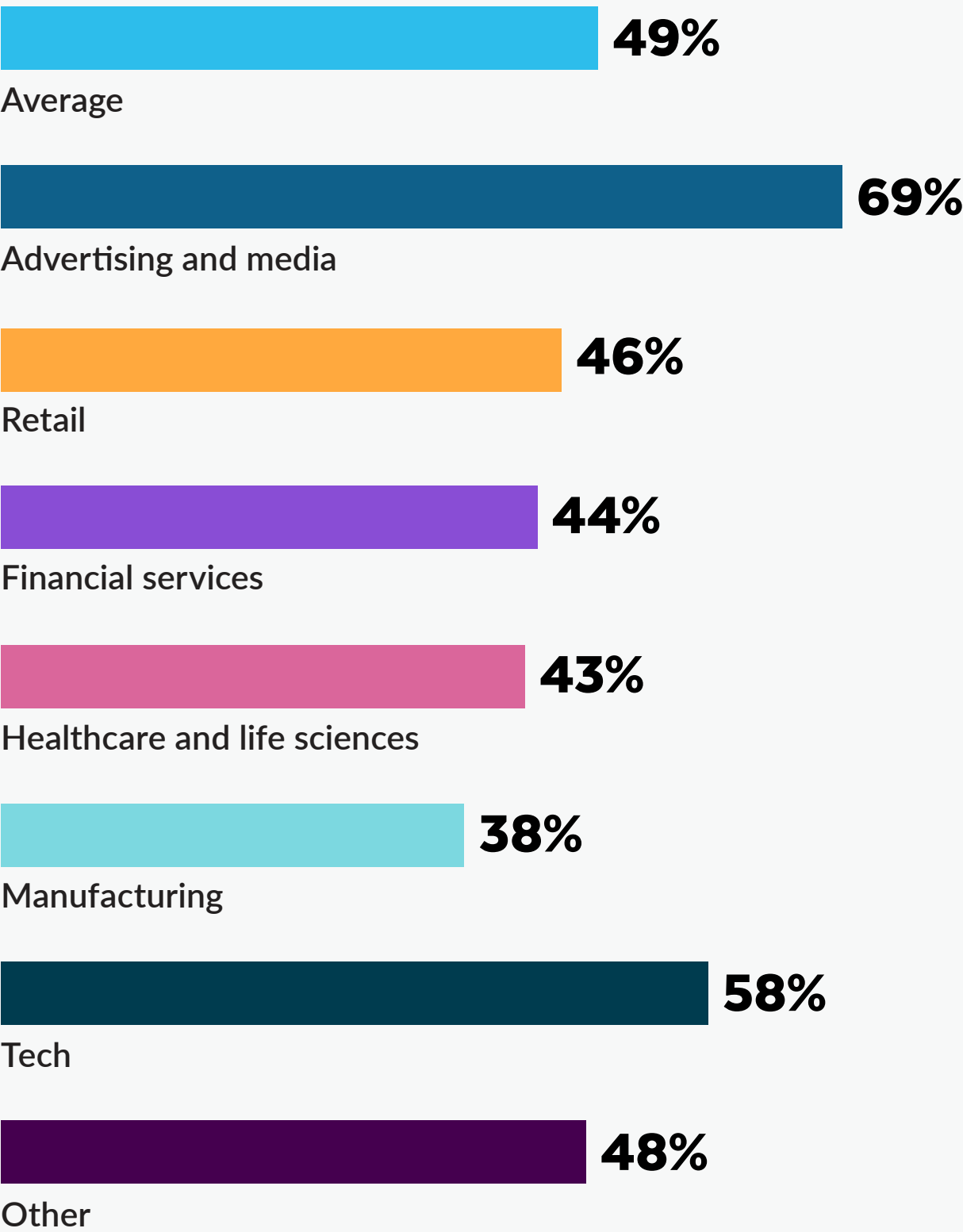
and software development teams (53% versus 50%). Further, they are more apt to apply gen AI tools to automating code testing processes (83% versus 64% across all sectors).

Given these results, it is not surprising to note that advertising and media companies are also outpacing peers on agentic AI adoption: 42% report using agentic AI in production today versus 31% of respondents in other sectors, and 43% strongly agree that work they do today will be done by autonomous agents within the next 12 months.

However, it is worth noting these early movers are running into issues with technical debt and data preparation at an elevated rate as they embrace agentic AI:

- 55% report their legacy systems are incompatible with modern AI requirements (versus 38% of respondents in other industries).
- 55% cite issues with difficult data preparation like data extraction and chunking (versus 40% among other industries).

Percentage of ROI identified by organizations that have quantified their ROI on gen AI initiatives





Financial services

Responses from financial services firms place the industry in the middle of the pack on gen AI adoption. Of all respondents starting the survey, those employed in financial services were more likely to report leveraging gen AI and LLMs for many use cases today (42% versus 38% among all other sectors), but the sector trailed advertising and media, retail, and healthcare and life sciences.

Financial services companies stand apart from others in their propensity to report employment disruption tied to AI-powered automation: 42% report that jobs at their company have both

been created and eliminated in the past 12 months due to AI (versus 35% across all industries), though it is worth noting that 79% of these respondents say the effect of AI on employment has been net-positive (versus 69% across all sectors).

Financial services firms are also unique in what they hope gen AI will provide to their businesses. They less often look to take costs out of their operations with AI (45% cite operational efficiency as a top driver versus 51% across all industries), while 44% cite improving financial performance as a top driver (versus 29% on average).

Finally, in terms of agentic adoption, it is clear financial services organizations are embracing the technology for some of their most mission-critical operations: 60% say better analytics and strategic recommendations are among their primary objectives (versus a 57% cross-industry average), and a notable 93% report improvements in scenario planning tied to advanced modeling as a result of agentic AI adoption (versus 86% in other sectors).

Primary business drivers for pursuing gen AI initiatives

	Average	Advertising and media	Retail	Financial services	Healthcare and life sciences	Manufacturing	Tech	Other
Operational efficiency	51%	50%	56%	45%	45%	57%	52%	53%
Decision-making	36%	36%	41%	36%	31%	34%	37%	35%
Customer experience	40%	36%	44%	43%	41%	40%	43%	35%
Innovation	44%	49%	39%	39%	46%	48%	49%	41%
Cost reduction	32%	30%	35%	28%	32%	34%	33%	31%
Talent management	26%	27%	27%	22%	28%	23%	25%	29%
Risk management	31%	33%	23%	31%	33%	33%	27%	35%
Financial performance	29%	25%	28%	44%	28%	22%	26%	29%

*1% in the advertising and media sector chose “other.”



Healthcare and life sciences

Respondents in the healthcare and life sciences industries paint a nuanced picture of gen AI adoption. On one hand, of all respondents starting the survey, those employed in these sectors were the second-most likely to report leveraging gen AI and LLMs for many use cases (47% versus 38% among all other sectors and trailing only those in advertising and media). On the other hand, among gen AI adopters, those in healthcare and life sciences were less likely to report their organization is using gen AI within various teams, including:

- Marketing (29% versus 35% across all sectors)
- Software development (43% versus 50%)
- Customer service (41% versus 49%)
- HR (36% versus 37%)
- Manufacturing/supply chain operations (30% versus 36%)
- ITOps (50% versus 62%)
- Cybersecurity (46% versus 53%)

Some of these gaps make sense; marketing and software development teams may be smaller and less mission critical in this sector, but the lower adoption in such ubiquitous functions as customer service, ITOps and cybersecurity suggests that the sector may be lagging more generally.

* In the following industries, 1% of respondents chose “other”: Healthcare/life sciences and tech/telco
In the following industries, 1% of respondents chose “none of the above”: Advertising/media, retail, manufacturing and other.

In particular, the data implies the industry has a strong opportunity to improve customer experience. Healthcare organizations were less likely than their peers to report applying gen AI to help with proactive customer issue identification (39% versus 49% across other sectors) and to guide customers to the right self-help resources (47% versus 60%).

The industry also may need to lean in further to understand the regulatory and privacy implications of AI solutions. Given the amount of personal data that healthcare and life sciences organization manage, their reactions to these considerations were surprisingly muted:

- Healthcare and life sciences organizations were only slightly different from their peers in terms of the propensity to have concerns about the regulatory implications of agentic AI (25% versus 22% across other sectors).
- Healthcare and life sciences organizations were less likely than their peers to be increasing investment in training programs focused on AI security and privacy protocols (58% versus 64% across other sectors) as well as general AI literacy (51% versus 58%).

This is an area the industry will need to increase focus on as agentic solutions mature and adoption increases.

Primary business drivers for pursuing gen AI initiatives*

	Average	Advertising and media	Retail	Financial services	Healthcare and life sciences	Manufacturing	Tech	Other
General AI literacy training	57%	52%	54%	63%	51%	58%	58%	58%
Prompt engineering workshops	37%	48%	38%	33%	39%	34%	37%	38%
AI ethics and responsible use training	57%	58%	58%	60%	54%	56%	64%	51%
Role-specific AI application training	48%	44%	52%	50%	45%	49%	47%	48%
AI tool certification programs	54%	52%	51%	57%	51%	55%	56%	54%
AI security and privacy protocols	64%	62%	60%	66%	58%	67%	65%	65%



Manufacturing

Data from respondents in manufacturing indicates that the industry is a laggard on gen AI adoption:

- Of all respondents starting the survey, those employed in manufacturing were the second-least likely to report leveraging gen AI and LLMs for many use cases — 37%, compared to advertising and media (58%), healthcare and life sciences (47%) and retail (44%).
- From an ROI standpoint, these organizations also lag other sectors in terms of ROI measurement (56% have quantified a positive return, the lowest reading across industries) and they report a mean ROI of 38%, also the lowest across industries.

Manufacturers appear more likely than their counterparts to view gen AI as a means to take costs out of operations, more often reporting operational efficiency is a key driver (57% versus 50% in other industries) and, in a positive note, 90% report seeing benefits in the area. However, those in manufacturing were the least likely to report finding benefits in the area of innovation and their organization’s overall financial performance.

From a challenges perspective, manufacturers were more likely than their counterparts to report issues tied to employee skills and experience (41% versus a 34% average across all other sectors), indicating that manufacturers must ramp up hiring, upskilling or both to reach parity with other industries. These skill gaps also likely explain why manufacturers have the strongest preference for prebuilt agents from vendors (68%) rather than sandboxes to build their own agents (31%).

Organizations identified key struggles in operating gen AI solutions

	Average	Advertising and media	Retail	Financial services	Healthcare and life sciences	Manufacturing	Tech	Other
Data quality and quantity	40%	27%	33%	45%	37%	42%	49%	39%
Scalability and performance	27%	35%	28%	29%	22%	26%	27%	25%
Integration with existing or legacy system	31%	29%	31%	34%	28%	30%	32%	32%
Solutions’ or vendors’ immaturity	18%	26%	15%	20%	18%	17%	17%	18%
Algorithmic transparency	23%	28%	21%	26%	23%	21%	24%	23%
Ethical or regulatory considerations	24%	30%	21%	27%	28%	25%	20%	24%
Monitoring for misuse	21%	26%	19%	21%	26%	18%	21%	22%
Use case identification	20%	16%	22%	20%	23%	20%	21%	18%
Cost	24%	18%	33%	20%	24%	28%	24%	23%
Employee expertise or skill	35%	29%	36%	36%	31%	41%	38%	33%
None of the above	4%	5%	5%	3%	7%	5%	3%	4%



Retail

The retail and consumer packaged goods sector seems to be a leader on gen AI adoption:

- Of all respondents starting the survey, those employed in retail were more likely to report leveraging gen AI and LLMs for use cases today (66% versus 58% among all other sectors).
- These organizations were more apt than others to be applying gen AI technologies to assist marketers (41% versus 34%), HR teams (42% versus 35%) and sales staff (39% versus 30%).

That said, retailers do tend to feel more cost constrained than their peers, with 33% reporting they are struggling with gen AI costs (versus a 24% average across all sectors). This is likely attributable to the comparatively thinner margins many retailers operate with.

While retailers tend to lead on gen AI adoption, they are slightly behind the curve on agents, with 29% using these technologies in production (versus 32% among all sectors) and 22% reporting definite plans for the technology over the next 12 months (versus 25% among other industries). Additionally, adopters in retail were less likely than their peers to report that agentic AI is helping reduce human staff requirements for complex/sophisticated tasks.

Regulatory concerns appear to be a key blocker for these companies; 28% cite uncertainty in this area versus 21% of respondents in other industries. If regulatory clarity can be achieved, retailers seem ready to catch up on agentic adoption (given their forward stance on gen AI), but if these questions persist, retailers may continue to lag.

Where organizations are in terms of adopting agentic AI

	Average	Advertising and media	Retail	Financial services	Healthcare and life sciences	Manufacturing	Tech	Other
No plans for or interest in agentic AI	4%	2%	5%	4%	4%	4%	3%	2%
Interested but early in the adoption process	28%	23%	30%	26%	28%	29%	28%	28%
Definite plans, unlikely to deploy in the next 12 months	12%	7%	14%	12%	15%	10%	9%	13%
Definite plans, likely to deploy in the next 12 months	25%	25%	22%	27%	19%	25%	27%	26%
Leveraging agentic AI in production today	32%	42%	29%	31%	34%	32%	32%	30%

* 1% said “Don’t know” in each of these industries: financial services, tech, other.



Tech

Data from respondents in the technology and telecommunications sector shows these organizations are aggressively applying generative AI to tech-centric functions and to great effect, namely software development (67% versus 46% in other industries) and ITOps (73% versus 60% in other industries). From a results standpoint, tech companies are more likely than their peers in other sectors to:

- Say that gen AI is improving innovation outcomes at their organization (87% versus 82%)
- Report a quantified, positive ROI (70% versus 60%)

From a challenges standpoint, it is worth noting that respondents at tech companies were more apt to report issues with gen AI initiatives tied to data quality and quantity (49% versus 38%). And as companies in this sector turn their eyes to agentic AI initiatives, these data issues are expected to persist: 34% cite data storage and use concerns as a major issue related to agentic technologies (versus 28% in other sectors), and 41% expect their fragmented data architecture to limit what agents can do at their organization (versus 35% overall).

While one might expect the tech industry to have a head start, rather than a trailing position, on gen AI adoption, the survey shows that leaders at tech companies must drive investments aimed at improving data quality, management and governance if they are to achieve their AI ambitions.

Gen AI has delivered material improvements in the following areas

	Average	Advertising and media	Retail	Financial services	Healthcare and life sciences	Manufacturing	Tech	Other
Operational efficiency	88%	86%	85%	88%	88%	90%	88%	88%
Decision-making	82%	84%	82%	83%	77%	81%	83%	82%
Customer experience	84%	81%	83%	87%	82%	82%	85%	83%
Innovation	83%	84%	84%	82%	81%	79%	87%	84%
Cost reduction	81%	81%	83%	79%	79%	82%	81%	82%
Talent management	74%	77%	70%	75%	78%	72%	69%	75%
Risk management	77%	82%	73%	76%	78%	77%	75%	80%
Financial performance	76%	78%	76%	82%	77%	71%	74%	76%

Global Perspective

Australia and New Zealand, Canada, France, Germany, India, Japan, Singapore, United Kingdom, United States





Country-Level Adoption Trends

To qualify for this research, respondents must have been employed at organizations with formal use cases for gen AI technology in production. In this report, 2,050 such organizations were assessed. However, to understand market penetration within represented countries, we tracked the rate at which respondents failed to qualify and where their organization stands on the adoption curve. In total, researchers contacted 3,479 organizations worldwide to identify the 2,050 qualified adopters of generative and agentic AI. The chart on this page considers the percentage of adoption from the entire initial-contact cohort to give a clearer version of gen AI adoption in each country.

The German, U.S. and Indian markets appear to lead on gen AI adoption. Half of German respondents said that their organization is leveraging AI in many use cases, and another 12% say they at least have initial use cases in production. High adoption rates are also reported in the United States (44% say many use cases, 23% say initial cases), and India is also reporting adoption at a high rate (42% many, 23% initial).

The Japanese, Canadian and UK markets come in at the bottom, though it is worth noting that even at the low water mark, 47% of UK-based respondents report their organization has at least a formal use case in production.

How all initial respondents described their interest in gen AI

	Australia/ New Zealand	Canada	Germany	France	India	Japan	Singapore	United Kingdom	United States
For many use cases	36%	29%	50%	37%	42%	32%	39%	28%	44%
For initial use cases	23%	21%	12%	15%	21%	18%	19%	19%	23%
Definitive plans for use cases	25%	32%	23%	26%	27%	26%	22%	31%	17%
Interested; exploring use cases	13%	18%	11%	20%	8%	22%	20%	20%	15%
No plans/interest	2%	0%	4%	1%	1%	3%	0%	2%	1%



Australia and New Zealand (ANZ)

Australia and New Zealand sit in the middle of the pack on gen AI maturity, with no statistically significant differences from the global average in terms of adoption or drivers. While adoption mirrors the broader market, those in ANZ were less likely to report seeing positive impacts from gen AI. Respondents lagged in:

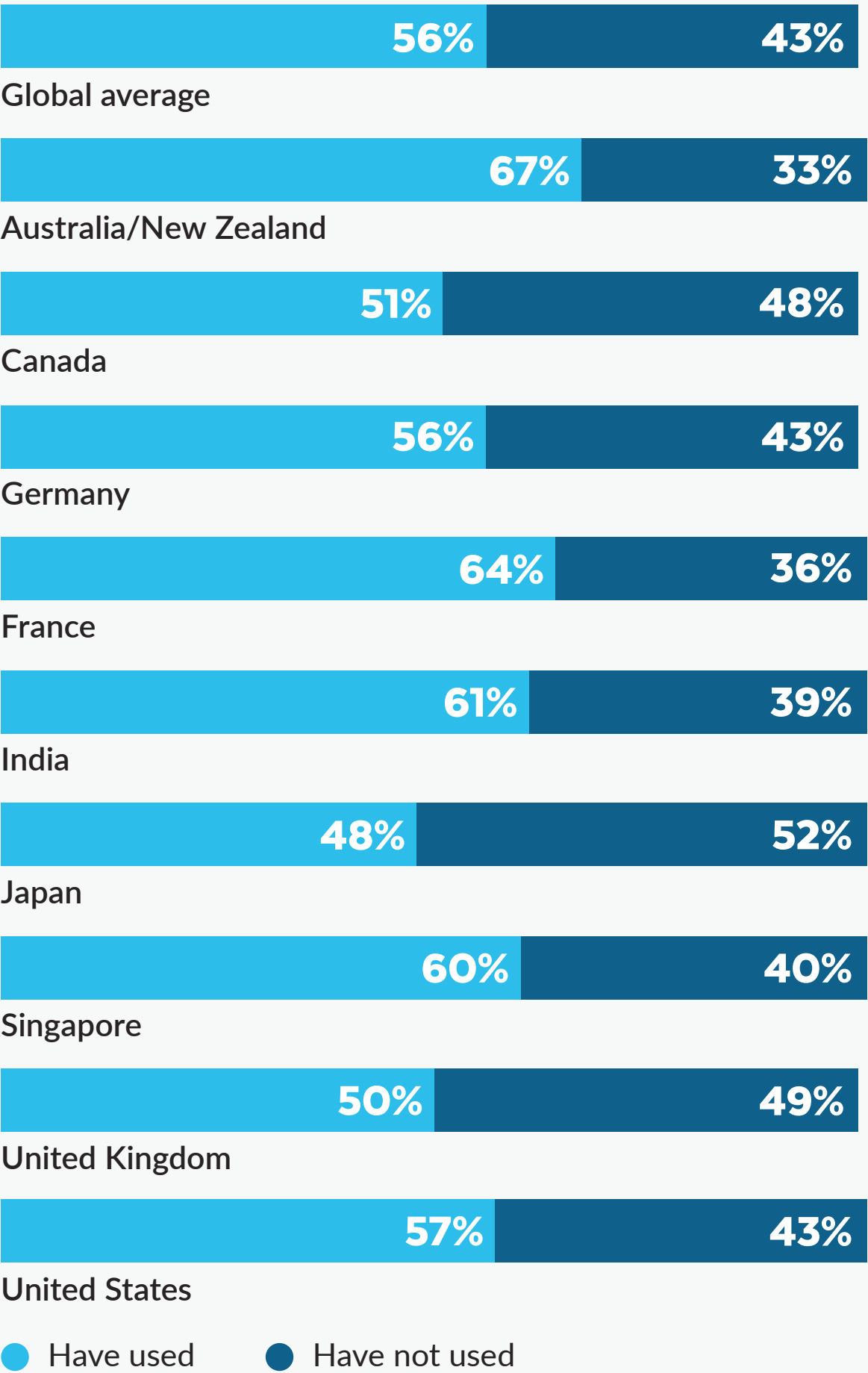
- Increased operational efficiency (83% versus 88% globally)
- Talent management outcomes (65% versus 74%)
- Risk management (69% versus 78%)

One key area where the usage of gen AI differs between ANZ and the rest of the globe is in ITOps:

- 54% of respondents within ANZ say their IT departments are using gen AI today, versus 63% globally.
- Further, 48% said within the IT team, gen AI is helping with log analysis and anomaly detection, a significantly lower percentage than was reported globally (58%).

One interesting note at the individual level: respondents in ANZ were the most likely to have used nonapproved AI tools for work (67% versus 56% globally), suggesting a pent-up demand for organizations in the region to accelerate formal usage allowances.

Percentage of respondents who have used, for work, a gen AI tool not approved by their company



* 1% chose “don’t know” in Canada, Germany and the UK



Canada

Data from respondents in Canada suggests that Canadian organizations’ gen AI adoption is lagging. This is seen in the introductory chart, [page 30](#), where among all organizations contacted for this research, Canadian respondents were second-to-last in terms of using gen AI across many use cases. Only the UK rated lower, at 28%. Looking at the Canadian organizations that are working with generative and agentic AI:

- Of those using gen AI today, 87% are using proprietary data to train, tune or augment commercial and open source LLMs. While high, it was the second-lowest response, behind Japan, at 86%.
- Additionally, Canadian respondents were the least likely to report that their ROI on gen AI has been quantified and is positive (53% versus 61% globally).

For workers, lagging adoption has an upside: Canadian respondents were significantly less likely to say that senior individual contributor roles had been replaced by AI-powered automation (25% versus 43% globally). Even shadow AI has less traction: 51% of Canadian respondents say they use unsanctioned gen AI tools, versus 58% worldwide. And looking ahead, Canadian respondents less often said that it’s “very likely” that tasks of theirs will be taken over by autonomous agents in the next 12 months (20% versus a 34% global average).

The survey also detected less anxiety about the pace of gen AI adoption. Canadians were less likely to say that their organization needed to increase investment in gen AI over current levels whether considering data (47% versus 54% globally), models (36% versus 46%), supporting software (57% versus 61%) or talent (43% versus 52%).

If all this seems a bit laid back, there’s an interesting contrast: Canadian organizations are more aggressively focused on customer use cases, with 45% prioritizing customers in their gen AI deployments (versus 35% globally) and 54% applying gen AI to customer service and support (versus 48%).

How all initial respondents described their interest in gen AI

	Global average	Australia/ New Zealand	Canada	Germany	France	India	Japan	Singapore	United Kingdom	United States
Nonapproved tools help get my job done faster	37%	36%	31%	27%	50%	50%	57%	24%	41%	33%
Approved tools lacked specific capabilities I needed	60%	48%	55%	43%	51%	65%	63%	69%	48%	67%
Approvals to use new tools take too long or get rejected too frequently	53%	49%	51%	45%	57%	58%	43%	64%	49%	55%
I was unaware of the policy against using these tools	25%	27%	25%	31%	26%	22%	29%	24%	29%	24%

* 1% of U.S. respondents chose “other.” “Don’t know” was chosen by respondents in France (4%) and the United States (1%).
Q13. Which of the following drove you to use nonapproved AI tools for work?



France

France falls in the middle of the pack on AI adoption with both weaknesses (in gen AI adoption) and strengths (in the ease of managing data for AI initiatives) relative to the other countries surveyed.

Where French-based organizations lag:

- Of all respondents starting the survey, those in France were less likely than the global average to say that their organization is using gen AI today (52% versus 60%).
- Looking at specific teams, there are four within which French respondents report lower gen AI adoption: software development (31% versus 51% globally), customer service (39% versus 49%), ITOps (47% versus 63%) and data analytics (50% versus 59%). There were no teams for which French respondents were significantly more likely to report use of gen AI versus the global mean.
- Additionally, French respondents report their organizations are achieving a materially lower ROI to date (32% – the lowest of any country – versus the global average of 49%). Thus, where the average return on every dollar invested is \$1.49, in France it is only \$1.32.

It is notable that French respondents cite materially different motivators for gen AI adoption. The French are less likely to say that they’re seeking operational efficiency (41% versus 52% globally) and innovation (34% versus 45%), but more likely to think gen AI can help with talent management (35% versus

25%). Additionally, French respondents say their organization tends to prioritize customer-centric use cases more often (52% versus 35% globally).

While gen AI progress lags, French respondents did report that their organizations were largely on pace with the rest of the globe on agentic AI adoption: 29% say they are using agentic AI today (versus 32% globally) and 28% report definitive plans over the next 12 months (versus 25% globally).

In several ways, French organizations seem to be closing the gap on agentic AI through one particular means: more effective DataOps. Across the board, French respondents were less likely to report struggling with a range of data operations:

- 45% say they are facing challenges breaking down data silos, versus 65% globally
- 45% say it is challenging for them to monitor data quality, versus 64% globally
- 34% say it is challenging to enforce data governance, versus 64% globally
- 32% report challenges meeting storage and compute requirements, versus 58% globally
- 38% report challenges prepping data to be “AI-ready,” versus 64% globally

Percentage of unstructured data that is ‘AI-ready’

	Global average	Australia/ New Zealand	Canada	Germany	France	India	Japan	Singapore	United Kingdom	United States
10% or less	40%	34%	46%	43%	31%	19%	37%	73%	33%	39%
11% to 25%	37%	36%	31%	38%	46%	41%	28%	22%	46%	39%
26% to 50%	15%	16%	11%	15%	16%	21%	20%	4%	13%	14%
More than 50%	7%	12%	10%	4%	5%	14%	7%	1%	6%	8%



Germany

Germany seems to be ahead of the curve on gen AI adoption:

- Of all respondents starting the survey, those in Germany were the most likely to say their organization is using gen AI across many use cases today (50% versus 38% globally).
- German organizations also cited a few challenges at significantly lower levels than their peers: Just 23% reported acute issues tied to legacy system integration (versus 31% globally) and 27% reported employee skill shortfalls (versus 36%).

Respondents in Germany were the most likely to report an increase in employment tied to AI adoption, with 58% reporting jobs have been created by AI-powered automation over the past 12 months (versus 42% globally). In a potentially related finding, respondents in Germany were less likely than the global average to report that gen AI technologies are helping them reduce costs (74% versus 82%).

Turning to agentic AI, German respondents are more enthusiastic than their peers:

- 45% say vendor solutions are rapidly maturing, versus 23% globally.
- 69% have either deployed agentic AI technologies already or have definitive plans to do so within the next 12 months (versus 57% globally).

- In terms of integrating agentic AI with their organization’s current technology infrastructure, they less often anticipate technical challenges, including fragmented data preventing agents’ access (21% versus 36% worldwide) and inadequate API infrastructure to support agent interactions (27% versus 37%).
- They also less often report concerns about future-facing job losses tied to agentic AI (19% versus 30% globally).

The data implies that German organizations are in a better position to adopt both generative and agentic AI technologies because their data houses are in better order. When asked about challenges faced when training, tuning and augmenting models in use, German respondents were less likely to report their organization struggled with data quality (36% versus 50% globally), data diversity (32% versus 40%), issues stemming from data sensitivity (39% versus 50%) and time-consuming data management (32% versus 43% worldwide).

Organizations face multiple challenges in curating data for AI systems

	Global average	Australia/ New Zealand	Canada	Germany	France	India	Japan	Singapore	United Kingdom	United States
Issues with data quality	49%	55%	45%	36%	48%	50%	60%	46%	46%	50%
Lacking range and diversity of data	39%	39%	36%	32%	39%	43%	46%	41%	30%	41%
Issues with data sensitivity	49%	51%	45%	39%	52%	59%	54%	39%	68%	47%
Time-consuming data management tasks	42%	42%	36%	32%	48%	45%	42%	43%	46%	44%
Difficult data preparation tasks	41%	34%	36%	45%	51%	42%	34%	44%	42%	39%
None of the above	11%	9%	12%	17%	8%	12%	5%	7%	6%	13%

*1% of respondents in the U.S and France chose “I don’t know,” and 1% in Australia/New Zealand chose “other.”



India

India sits in the top three of gen AI adoption leaders, alongside the United States and Germany.

- Of all respondents starting the survey, those in India were more likely than the global average to say that their organization is using gen AI across many use cases today (42% versus 39% worldwide).
- Indian respondents were the most likely to report that their firms had quantified a positive ROI tied to gen AI (71% of respondents, versus 61% globally).
- In terms of specific use cases, respondents in India were more likely than average to be employing gen AI to assist with software development (65% versus 48% globally), customer service (58% versus 48%), sales (41% versus 31%), ITOps (76% versus 61%), cybersecurity (69% versus 52%) and data analytics (75% versus 57%).

Gen AI appears to be driving structural changes in India's economy, given that IT services and software development are a large portion of India's GDP, so it is noteworthy that the country is a leader in applying generative AI to coding and operations:

- 77% report using gen AI to generate code, versus 64% globally.
- 76% use gen AI for code reviews and debugging, versus 65% globally.

- 66% use gen AI in IT/cybersecurity incident response, versus 54%.
- 68% use gen AI to configure and optimize infrastructure, versus 58%.

Aggressive adoption seems to be paying off: Indian respondents report positive outcomes, including improved efficiency (94% versus 87% globally), innovation (92% versus 83%) and financial performance (86% versus 75%).

Looking ahead, Indian companies seek to maintain or expand their early-mover advantage on gen AI and agentic AI. They anticipate 28% of their tech budgets for the next 12 months will go to gen AI initiatives (the highest reading across countries, and ahead of the 22% global average). And 66% are using or have definitive plans in the next 12 months for agentic AI versus 56% globally.

Where organizations are in terms of adopting agentic AI

	Global average	Australia/ New Zealand	Canada	Germany	France	India	Japan	Singapore	United Kingdom	United States
No plans for or interest in agentic AI	4%	3%	2%	5%	2%	1%	1%	5%	4%	5%
Interested but early in the adoption process	28%	27%	32%	16%	22%	24%	19%	25%	33%	33%
Definite plans, unlikely to deploy in the next 12 months	12%	13%	13%	10%	19%	8%	10%	17%	15%	10%
Definite plans, likely to deploy in the next 12 months	25%	26%	22%	32%	28%	33%	35%	17%	18%	23%
Leveraging agentic AI in production today	32%	31%	31%	37%	29%	33%	36%	35%	30%	30%

* 1% chose "I don't know" in each of these countries: ANZ, Singapore, India



Japan

Interestingly, the reported drivers for gen AI adoption in Japan are notably different than for the rest of the world. Japanese respondents were much more likely than the global average to cite:

- Operational efficiency (64% versus 50% globally)
- Cost cutting (51% versus 30% globally)
- Risk management (39% versus 30%)

Two motivators that appeared less interesting to Japanese organizations were customer experience, cited 23% of the time versus a global average of 41%, and overall financial performance, cited by 15% versus 30% worldwide.

The data on ROI is also nuanced. On one hand, Japanese respondents were less likely to report their organization had quantified a positive ROI on their gen AI initiatives (48% versus 62% globally). On the other hand, when quantified, Japanese respondents reported a markedly higher return: 59%, or \$1.59 for every dollar invested, versus 49% globally.

Japan trails the global average in actively training, turning or augmenting the models they use with proprietary data: 86% versus 92% globally.

On the other hand, Japan pulls ahead in terms of using gen AI in data analytics workflows (68% versus 59% globally), with 89% reporting they’ve seen an acceleration of their time-to-insight KPIs as a result.

Finally, at the individual level, respondents in Japan were the least likely to have used nonapproved AI tools for work (48% versus 58% globally), indicating that gen AI adoption in Japan is very much led by organizational strategy.

Primary business drivers for implementing and advancing gen AI

	Global average	Australia/ New Zealand	Canada	Germany	France	India	Japan	Singapore	United Kingdom	United States
Operational efficiency	50%	51%	49%	57%	41%	51%	64%	41%	57%	51%
Decision making	36%	33%	33%	31%	38%	37%	30%	33%	35%	38%
Customer experience	41%	43%	39%	38%	43%	53%	23%	35%	40%	41%
Innovation	44%	43%	47%	42%	34%	51%	37%	44%	43%	46%
Cost reduction	30%	35%	35%	35%	34%	22%	51%	35%	29%	28%
Talent management	26%	20%	22%	27%	35%	29%	25%	30%	29%	25%
Risk management	30%	29%	30%	33%	37%	24%	39%	37%	33%	29%
Financial performance	30%	27%	29%	25%	29%	28%	15%	28%	32%	33%



Singapore

Singapore is right on pace with the global average in terms of overall gen AI adoption. Thirty-nine percent of Singaporean respondents who started the survey report that their organization uses gen AI for many use cases today, identical to the worldwide average.

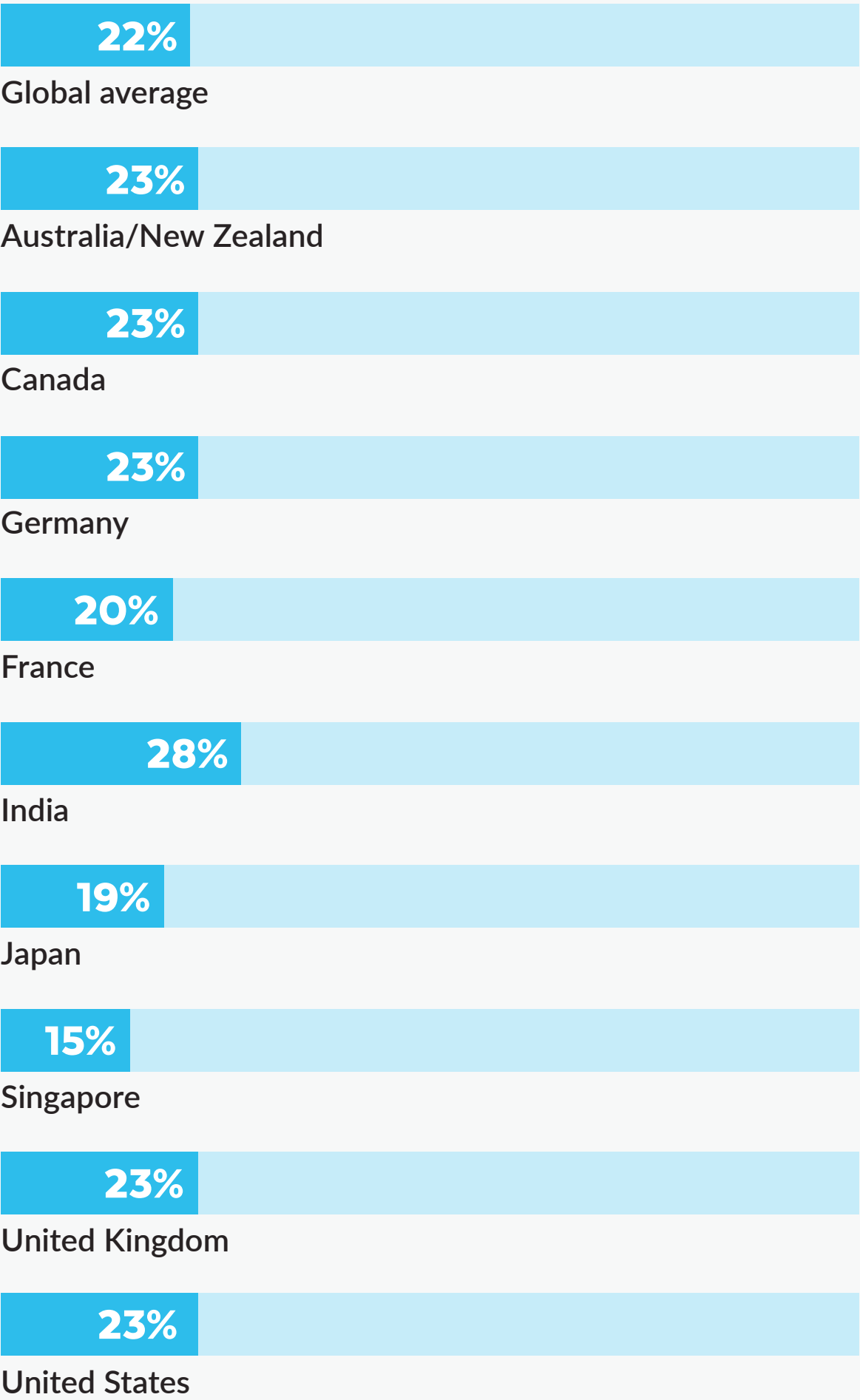
However, Singapore seems to trail in broad use-case adoption, less-frequently reporting that gen AI is in use in the following departments:

- Marketing (24% versus 36% globally)
- Software development (39% versus 50%)
- Customer service (39% versus 49%)
- HR (25% versus 37%)
- ITOps (45% versus 63%)
- Cybersecurity (33% versus 55%)
- R&D (31% versus 43%)

This may explain why the impact of gen AI seems to be muted in Singapore. Respondents there are less likely to report gains in operational efficiency (79% versus 89% globally), cost reduction (75% versus 82% globally) and quantified ROI (measured at 33% versus 49% on average globally).

Singaporean respondents understand this challenge, with 32% citing identifying use cases as a top AI challenge, versus 19% globally. Without an improved ability to uncover, champion and execute new AI initiatives, the Singaporean market is at risk of falling behind. For example, over the next 12 months, Singaporean respondents estimate gen AI will account for 15% of their tech budget, while their counterparts globally peg the figure at 23%. For a closer breakdown, see the chart at right.

Percentage of tech budget to be allocated to gen AI





United Kingdom

UK responses indicate lagging gen AI adoption, with the lowest gen AI penetration recorded. This does not appear to be an issue with use case identification (only 11% of qualified respondents cited this as a top challenge with gen AI, versus 21% globally), but ethical and regulatory concerns weigh heavily more often (35% versus 23% globally).

When gen AI is in use, organizations in the UK are seeing big impacts:

- UK respondents were twice as likely as the global average (16% versus 8%) to say that the impact of gen AI on jobs had been a net negative – costing more jobs than were created.
- When quantified, UK organizations are seeing the highest ROI to date: 61% versus 49% globally).
- UK-based respondents were much more likely than their peers globally to report that their organization was using gen AI in marketing (47% versus 34% globally), procurement (40% versus 30%) and cybersecurity (62% versus 53%).
- Finally, early agentic initiatives are allowing nearly all UK-based organizations to reduce human involvement in repetitive tasks (93% versus 76% globally).

Looking ahead toward the adoption of agentic AI, respondents in the UK are more bullish than their peers about using agents in two areas:

- 58% expect to be using agents within the next 12 months for customer service and support (versus 45% globally).
- 38% expect to be using agents to automate procurement operations in the next 12 months (versus 29% worldwide).

How AI-powered automation has affected jobs over the past 12 months

	Global average	Australia/ New Zealand	Canada	Germany	France	India	Japan	Singapore	United Kingdom	United States
Jobs have been eliminated	11%	17%	14%	9%	11%	5%	16%	13%	17%	8%
Jobs have been created	42%	41%	31%	58%	53%	40%	35%	52%	33%	40%
Both are true	35%	33%	42%	23%	18%	40%	23%	29%	40%	40%
Jobs have not been affected	13%	9%	13%	10%	18%	15%	26%	6%	9%	13%



United States

Data from respondents in the United States indicates that they are ahead of the curve on gen AI adoption. Highlights include:

- **U.S. leads in measuring ROI:** 67% of U.S. respondents say that their organization has quantified the positive ROI they’ve achieved to date (versus 57% globally).
- **U.S. leads in IT use cases — and positive outcomes:** U.S. respondents more often state that they use gen AI to assist with:
 - Software development (54% versus 47% globally)
 - ITOps (67% versus 58% globally)
 - Code quality (86% versus 75% globally), code testing (87% versus 79%) and help desk automation (64% versus 59%)
- **U.S. leads in job disruption:** 40% in the United States say that roles have both been created and eliminated by AI in the past 12 months (versus the 31% global average).

A positive note: 75% of respondents say the net impact of AI on job creation has been positive to date (versus 63% globally).

Along with these indications of initial progress, there are signs that progress is plateauing. U.S.-based respondents more often cite problems with data quantity and quality (44% versus 38% globally) and shortfalls in staff expertise needed for projects (40% versus 32%).

Additionally, the data shows that U.S.-based respondents are more skeptical of vendors’ agentic offerings, with 42% saying the agentic landscape is rife with vaporware or more marketing than substance (versus 38% of respondents worldwide). Still, U.S.-based respondents are more apt to expect several business organizations to adopt agentic solutions over the next 12 months, including software development (49% versus 43% globally), customer service (49% versus 44%), HR (37% versus 33%) and IT (61% versus 54%).

Given these results, there are some learnings that global organizations can take from U.S. organizations:

1. **Increase focus on how AI can be applied to drive efficiency and productivity from the workforce:** U.S. respondents more often say their organization is prioritizing employees in their AI use case (71% versus 59% globally) rather than customers (29% versus 41%).
2. **More aggressively pursue the use of gen AI in technology departments:** Develop use cases in IT, cybersecurity and software engineering.
3. **Focus on the unification of the data estate:** 54% of U.S. respondents strongly agree that their organization is actively investing in solutions to unify consolidated data versus 45% of organizations globally.

ROI assessment, by country

	Global average	Australia/ New Zealand	Canada	Germany	France	India	Japan	Singapore	United Kingdom	United States
We know it is positive because we’ve quantified it	61%	57%	53%	58%	57%	71%	48%	55%	58%	67%
We think it is positive but haven’t quantified it	31%	35%	39%	39%	35%	22%	37%	33%	34%	27%
It is neutral	6%	7%	7%	3%	8%	7%	12%	9%	6%	5%
We think it is negative but haven’t quantified it	1%	1%	0%	0%	0%	0%	2%	2%	1%	0%

*1% of respondents in the UK said they had quantified ROI, and it was negative. In Canada, Germany, Japan and the UK, 1% responded “I don’t know.”



Methodology

Research methodology

In preparing to create this report, Omdia by Informa TechTarget conducted a comprehensive online survey fielded between Aug. 13, 2025, and Sept. 17, 2025. All respondents represent organizations with 500 or more employees. About 34% of respondents represent organizations with more than 5,000 employees; 49% represent orgs with 1,000–4,999 employees; and 17% come from companies of 500–999 workers.

The intent of this report, and the research that underpins it, is to better understand the experiences enterprise organizations are having with generative AI technologies. In many regards, this research is a continuation of 2025's research and report and it spans considerations like LLM use cases, benefits, challenges, ROI, expectations for the future and more. Additionally, it breaks new ground as organizations turn to agentic AI solutions to further automate business processes. Many of these insights can only be gleaned by surveying organizations with real gen AI experience in production. As such, our survey targeted organizations currently using gen AI to augment and execute business processes in production.

However, the research allows us to make observations about how broadly gen AI has been adopted by enterprises to date. Of the 3,479 respondents who started the survey, 59% reported

their organization is already using gen AI across many business use cases (39%) or for a few initial use cases (20%). Further, just 2% of respondents reported their organization has no plans or interest in adopting solutions.

These findings show remarkable consistency with the data collected a year ago indicating that gen AI has, to date, resisted the typical boom-bust-recovery adoption cycle endemic to new enterprise technologies. We believe there are two dynamics at play to bolster adoption: users' integration of gen AI into daily digital experiences and a significant, demonstrable enterprise impact being achieved across multiple use cases. Together, gen AI's widespread impact on users' personal lives and the impacts it has had to date on enterprise workers' efficiency and productivity appear to be helping it resist usage and investment pullbacks typically seen when hype outstrips reality.

The 2,050 adopters who completed the survey were drawn from IT and cybersecurity (49%), software development (16%), data operations (9%) and other lines of business (for example, marketing, customer support, manufacturing, 25%). To qualify, respondents must have reported they would be influential in their organization's future AI purchases. A range of seniorities are represented, from C-level executives to senior individual

contributors. Additionally, the research includes responses from across the globe, including the United States (41%), Canada (7%), the United Kingdom (7%), France (7%), Germany (7%), Australia and New Zealand (7%), Japan (7%), Singapore (7%) and India (7%). The margin of error for this sample size is +/- 2 percentage points at the 95% confidence level. The totals presented in figures and tables throughout this report may not add up to 100% due to rounding.





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