July 2026
Business Value White Paper
Sponsored by Elastic

The Business Value of the Elasticsearch Platform for Search and AI Experiences

Amy Machado
Senior Research Manager,
Content and Knowledge Discovery Strategies, IDC

Matthew Marden
Research Vice President,
Business Value Strategy Practice, IDC

Table of Contents

Click any title to navigate directly to that page.

Business Value Highlights

Click each to jump to related content. Use "Return to Highlights" in the page header to get back here.

517% three-year return on investment

11-month payback on investment

44% more relevant search results

43% lower search abandonment rate

$52.26 million higher AI-related revenue per organization

40% faster to minimal viable AI product

27% higher development team productivity

14% higher customer satisfaction

150 hours per year higher productivity per internal search user

22% more efficient customer support teams

15% lower cost per query

Executive Summary

The transition from search to agentic experiences depends entirely on the precision of underlying context. As AI rewrites the technology stack, a new layer has emerged between enterprise data and AI applications that determines whether AI delivers reliable, grounded answers or costly hallucinations. Organizations need more efficient ways to build and deliver fast, relevant, and reliable experiences that are grounded in proprietary data. This white paper shares the experiences and business impact of companies that shifted their search and AI-driven workloads to the Elasticsearch Platform, using it as a unified foundation and layer to deliver precise context that grounds search and AI experiences in real-time business data for enterprise search, analytics, and emerging AI applications.

Across interviews with organizations in the financial services, healthcare, retail, government, and other sectors, users reported faster and more accurate search results, reduced time spent finding information, and improved operational visibility. They also noted productivity gains, quicker incident resolution, and support for newer semantic, vector, and retrieval-augmented generation (RAG) use cases. Collectively, these gains span faster delivery of AI-driven products, higher revenue from improved customer experiences, stronger employee productivity, and a more resilient operational environment.

IDC interviewed organizations that use the Elasticsearch Platform across enterprise search and AI use (including agentic AI) and observability use cases to understand its impact on search capabilities and business operations. Across the interviews, study participants linked achieving value with the Elasticsearch Platform to better search relevance and speed, faster delivery of AI-enabled use cases, broader workforce productivity gains, and stronger operational resilience. These benefits reflect their ability to use the Elasticsearch Platform as the enterprise search and context and retrieval layer for enterprise AI enablement, grounding generative experiences in trusted organizational data, accelerating the delivery of AI-driven use cases, and consolidating search and observability functionalities within a single foundation.

Across interviews with organizations, users reported faster and more accurate search results, reduced time spent finding information, and improved operational visibility.

Based on the interviews, IDC projects that, through the use of the Elasticsearch Platform, study participants will realize annual benefits worth $241,600 per AI-driven search/GenAI product, service, and use case ($13.43 million per organization) by:

- **Delivering minimal viable AI use cases and products** faster and more effectively, thereby enabling AI-based business use cases and driving substantial revenue gains
- **Improving search capabilities and outcomes,** with faster, more relevant query answers resulting in more actionable search- and AI-related outcomes, including fewer null results and search abandonment rates, that can generate internal efficiencies and positive business impact
- **Enhancing development team productivity** by building faster on the Elasticsearch Platform as a result of AI enablement and enhanced search functionality
- **Increasing productivity across enterprise operations,** with employees spending less time searching, triaging, and answering routine questions using search and AI solutions and benefiting from faster access to answers to support decision-making
- **Strengthening operational resilience with unified visibility into the performance of search and AI applications,** thereby speeding debugging and recovery to help mitigate business and operational risk

Situation Overview

The Elasticsearch Platform competes in the knowledge discovery and AI-enhanced search markets, where demand is accelerating as organizations seek to accurately access, retrieve, and operationalize all of their data assets (structured, semi-structured, and unstructured). The enablement of AI-driven search and discovery is the leading driver of enterprise investments in GenAI solutions due to the platform's content solutions and workflows, and nearly 85% of companies are choosing to invest in a commercial solution such as Elasticsearch Platform, rather than building on their own platform.

The top influencers in the "build versus buy" decision are faster deployment, product support and maintenance, and the feature richness and innovation of the commercial solution (IDC's *State of Content and Knowledge Solutions Survey,* November 2025). The complexity of "build" AI development itself, which requires stitching together different components (integrating vector databases and embedding services,

search engines, and orchestration layers) compounds these challenges, and creating architectures can be difficult and costly to maintain.

A complete AI platform has the ability to address the top 3 challenges that enterprises face right now: integrations, growing data volumes, and security and governance gaps. Fifty-three percent of companies report struggling with integrations for dependent applications, disconnected systems, and information silos, while 52% say that protecting sensitive information and ensuring compliance with auditing and regulations is an ongoing concern for IT (IDC's *State of Content and Knowledge Solutions Survey,* November 2025).

There is increasing demand for unified search and context retrieval capabilities that break down data silos and support intuitive, context-aware answers and actions across growing volumes of structured and unstructured data. IT is reporting positive business impacts that include greater collaboration, more innovation, and a better security and compliance posture (IDC's *State of Content and Knowledge Solutions Survey,* November 2025). AI is driving these positive impacts as organizations address new demands for faster, more intelligent, and more personalized search and AI experiences in support of knowledge work and decision-making. However, many retrieval platforms struggle to consistently match real user intent, while infrastructure bottlenecks at scale force trade-offs between performance and cost efficiency.

Advancements in natural language processing, semantic and vector search, and AI, all of which are raising expectations for relevance, precision, and responsiveness, are reshaping this market. Emerging trends are redefining what users expect from search platforms, including conversational and assistant-style search interfaces, deeper integration with collaboration tools, and techniques that improve context and insights, such as advanced RAG and knowledge graphs to improve context and insight. Search is also foundational to agentic AI because organizations are looking to build agentic systems that can reason, retrieve, and act on information to complete complex, multi-step tasks. These trends mean heightened requirements for secure, compliant search experiences as enterprises index and analyze sensitive data across hybrid environments at scale.

Looking ahead, the ongoing innovation in AI, the push for more automated and embedded search and agentic AI experiences, and rising security and governance needs will continue to influence users and technology suppliers. Solutions that combine strong retrieval foundations with flexible, AI-ready architectures will be best positioned as search becomes the access point and critical enabler of productivity, automation, and enterprise intelligence.

The Elasticsearch Platform Overview

Elastic offers a unified platform designed to help organizations find, retrieve, and apply their data assets more effectively across search, analytics, observability, security, and emerging AI workloads, and the platform delivers key capabilities to build, monitor, and secure agents that deliver business impact.

At its core, the Elasticsearch Platform is a complete data platform for search and AI. It is an open stack that combines a scalable distributed data store, a widely adopted vector database, semantic and hybrid search, Jina AI models, and an agent builder for search- and AI-driven experiences and agents. A platform that unifies context retrieval, agentic workflows, comprehensive observability, and security is built around it. It empowers IT and technology leaders to simplify context engineering and build trusted, best-in-class search, GenAI, and agentic applications at scale across any use case and regardless of where data resides.

The Elasticsearch Platform simplifies building best-in-class search, AI, and agentic applications with state-of-the-art Jina AI models for vector and hybrid search, which deliver trusted answers at scale, irrespective of the data's location. Integrated inference APIs streamline connections to external LLMs, while Elastic's ingestion tools, ranking controls, and tuning frameworks give teams transparency and control over how search and AI results are generated. The platform's observability capabilities further support operational resilience by enabling faster root cause analysis, automated alerting, and self-healing workflows that help organizations detect and resolve issues before they impact performance or availability.

For users, these capabilities translate into an improved ability to find information across systems and more reliable experiences, including the deployment of reasoning agents. It means faster, more relevant retrieval and outcomes, which is key considering that accuracy is a top challenge at the inference stage (i.e., when answers are generated) (IDC's *Agentic AI and Data Q4 Quick Poll,* November 2025). Whether powering customer-facing applications, aiding with internal knowledge discovery, or driving new agentic workflows, Elastic helps reduce time spent searching, improves the accuracy of responses, and provides a flexible foundation for scaling new AI use cases securely and efficiently.

The Business Value of Elasticsearch Platform

Study Firmographics

IDC conducted in-depth interviews with organizations that use the Elasticsearch Platform to gather quantitative and qualitative feedback to assess the operational, productivity, and business impacts of use. For this study, IDC interviewed a sample of Elasticsearch customers with an average of 36,521 employees and $15.01 billion in annual revenue (medians of 21,000 employees and $15.00 billion in annual revenue, respectively). These organizations supported an average of 56 AI-driven search and GenAI products, services, and use cases (median of 23). The sample was concentrated in the United States, with additional organizations in Canada and the United Kingdom, and spanned financial services, retail, government, healthcare, insurance, manufacturing, and software. For additional information about the study participants, please see **Table 1 (below).**

Table 1

Firmographics of Interviewed Organizations

Firmographics	Average	Median
Number of employees	36,521	21,000
Number of IT staff	1,467	900
Number of business applications	543	100
Number of AI-driven search/GenAI products, services, and use cases	56	23
Annual revenue	$15.01B	$15.00B
Countries	United States (8), Canada (2), United Kingdom	
Industries	Financial Services (3), Retail (3), Government, Healthcare, Insurance, Manufacturing, Software	

n = 11; Source: IDC Business Value In-Depth Interviews, March 2026

Choice and Use of the Elasticsearch Platform

Study participants described choosing the Elasticsearch Platform based on a combination of prior positive experience with Elastic and the need for an enterprise-ready platform to support current enterprise search requirements and emerging AI use cases. They emphasized confidence in Elastic's maturity, scalability, and reliability, along with the ability to ingest data quickly, search across diverse systems, and standardize on one platform that establishes a contextual foundation instead of relying on more fragmented tooling. Interviewees also valued transparency into systems and operations, especially for observability, resiliency, and time to market–sensitive environments. Their comments reflect that practical operational fit and AI plans and ambitions drove their platform choices.

Study participants spoke in more depth about their own organizations' selection criteria:

Positive view of AI capabilities for existing platform (Principal Application Engineer, Financial Services, the United Kingdom):

"We've been using the Elasticsearch Platform, and as it began providing AI capabilities, we started leveraging them as well. We are trying to standardize enterprisewide around Elastic and move away from other providers."

Proven value for vertical use cases, functionality for searching across use cases (Director of IT, Healthcare, the United States):

"The Elasticsearch Platform had proven use cases in healthcare and was able to design a product that ultimately met our requirements. Once the data is ingested, it becomes searchable very quickly, and it works as an enterprise tool across multiple use cases."

Experience with Elasticsearch, the need for scalability and robustness (VP of AI and Analytics, Software, the United States):

"We had familiarity with Elasticsearch as an open source solution and with the Elastic Lucene-based search technology itself. We wanted to continue using our current pipeline and code base."

Strength as a search platform (VP of Engineering, Retail, the United States):

"The Elasticsearch Platform is a very mature and reliable search platform. There is a strong hiring pool, significant investment behind the product, and it's enterprise appropriate."

Study participants laid out four broad categories of use cases for the Elasticsearch Platform. The first two use cases drive significant value in terms of enhanced integration of enterprise search capabilities into day-to-day business operations and in the development of emerging AI use cases, applications, and services:

- **Customer and revenue-facing AI experiences and products:** By powering searches, chatbots, and secure customer interactions with semantic search and RAG capabilities, study participants can deliver more robust and impactful AI solutions to their customers and employees, and often at greater speed.
- **Enterprise knowledge and workforce enablement:** By providing robust enterprise search, policy Q&A, and clinical retrieval capabilities, study participants reduce friction in terms of accessing and using data on a day-to-day basis for many employees.
- **Risk, fraud, and decision intelligence:** By surfacing anomalies, supporting claims and underwriting decisions, study participants can flag anomalous transactions, accelerate claims triage through image search, and surface relevant policy and customer data to inform underwriting.
- **Observability, operations, and system reliability:** By enabling robust analysis of logs and speeding root cause analyses with AI, including automated alerts, study participants can improve operational visibility and system reliability.

At the time of the interviews, study participants used the Elasticsearch Platform to power large and often mission-critical search environments that require scale and speed. On average, they handled 6.68 billion search queries per year (median of 39 million), supported 24,157 concurrent users, and integrated 345 applications or data systems. They also reported sizable semantic and AI scale, with 20.3 million vector embeddings and 21TB of data ingested (structured and unstructured) per day. These usage levels underscore that search is not a peripheral function for these organizations; rather, it sits at the center of customer experiences, employee workflows, AI applications, and operational visibility. For additional details about study participants' use **(Table 2, next page).**

Table 2

Use of Elasticsearch Platform by Interviewed Organizations

Use	Average	Median
Search query volume per year	6.68B	39.00M
Maximum number of concurrent users	24,157	1,000
Number of applications and/or data systems integrated	345	15
Number of vector embeddings for semantic search or AI use cases	20.3M	2,000

n = 11; Source: IDC Business Value In-Depth Interviews, March 2026

Business Value Results

The Elasticsearch Platform delivers value to study participants by making search and retrieval faster, more relevant, and more dependable across both customer-facing and internal use cases that include cutting-edge AI solutions, such as agentic AI solutions. As a result, study participants reported delivering viable new AI products faster, embedding robust search capabilities in products, increasing developer productivity, gaining revenue by improving customers' experience, and achieving enterprisewide productivity gains from employee time savings and productivity gains linked to searches.

Across their complex and strategically important search activities, interviewed organizations use the Elasticsearch Platform to execute more traditional enterprise searches and fuel AI services and use cases.

Interviewed Elastic customers highlighted the most significant benefits they have achieved:

Scalable search capabilities for business growth (VP of AI and Analytics, Software, the United States):

"With the Elasticsearch Platform, we can grow our business however we want without worrying about whether our search stack will scale smoothly. Our AI business is growing, and we can grow at whatever pace we choose, serving more regions and more international customers."

Improved data quality and security (IT Manager, Government, Canada):
"The Elasticsearch Platform reduces hallucinations because the data is grounded in our own data sources, which lowers errors and improves the quality of the information being delivered. It's also flexible, so we can add hybrid capabilities without needing to rewrite queries, and using rule-based access control, we can limit and control access to the data."

Improved discovery and relevancy (Director of Store Systems and Innovation, Retail, the United States):
"With the Elasticsearch Platform, we benefit from improved discovery and relevancy at scale. It enables better customization and higher productivity, which is the core business benefit. Quantitatively, about 5,000 people are saving time, and we estimate they're saving roughly 10% of their total work time, reducing the friction and time spent on search activities."

Value of log analytics (Director of Technology, Financial Services, the United States):
"Our most significant use case for the Elasticsearch Platform is log analytics. We're able to stream our logs, and it makes it helpful for us to then navigate through those logs, investigate creator alerts, and utilize dashboards and visualization capabilities."

Based on interviews with current Elasticsearch Platform customers, IDC calculates that they will realize annual benefits worth an average of $241,600 per AI-driven search/GenAI product, service, and use case (Figure 1, next page). With an average of 56 AI-driven search/GenAI products, services, and use cases per organization, this equates to approximately $13.43 million in annual benefits per organization across the following areas (Table 12 in Appendix B) for additional details about each of these areas of value):

- **Higher net revenue:**
  Study participants have captured revenue gains from the creation and faster delivery of AI-enabled services and products, as well as better customer experiences that improve conversion, retention, and revenue protection. IDC puts the value of net revenue gains at an annual average of $165,000 per AI-driven search/GenAI product, service, and use case ($9.18 million per organization).

- **Employee productivity benefits:**
  Study participants benefit from having their employees spend less time searching, analyzing information, providing support, and handling route requests across business functions. IDC calculates that study participants will realize time savings and productivity gains worth an annual average of $57,500 per AI-driven search/GenAI product, service, and use case ($3.20 million per organization).

- **IT staff productivity benefits:**
  Developer, IT, and platform teams gain from faster debugging, enhanced incident investigation, more effective development, and more efficient platform management and support operations. IDC quantifies the efficiencies and productivity gains for these teams as worth an annual average of $19,100 per AI-driven search/GenAI product, service, and use case ($1.06 million per organization).

Figure 1

Average Annual Benefits per AI-Driven Use Case

($ per AI-driven search/GenAI product/use case)

$165,000
Business benefits (higher net revenue)

$57,500
User productivity benefits

$19,100
IT staff productivity benefits

$241,600

n = 11; Source: IDC Business Value In-Depth Interviews, March 2026

Faster Time to Market for AI Products

While improved enterprise search performance delivers considerable immediate operational value, interviewed organizations emphasized the strategic impact of the Elasticsearch Platform in serving as a foundation for AI innovation. They described the Elasticsearch Platform as a unified, consolidated, and practical foundation for their production AI environments. Importantly, they can connect enterprise data to keyword, semantic, vector, and hybrid retrieval methods that make query search responses more contextual and more reliable.

Interviewed organizations cited this foundation of improved context as driving new AI-based use cases in areas such as sales content retrieval, customer and employee assistance, fraud detection, underwriting, secure knowledge access, and retrieval-augmented generation.

By improving the speed and quality of data retrieval, the Elasticsearch Platform has also helped organizations move AI use cases from experimentation to achieving production environment value.

Study participants noted the following real-world examples of AI use cases delivered with the Elasticsearch Platform:

- AI-powered search foundation for sales enablement and content retrieval platforms
- Customer service agent support, including chatbots
- AI agents suggesting product portfolio fit and integration options
- Secure, AI-mediated query responses alongside the protection of sensitive and regulated data
- The monitoring of system reliability and incident resolution with AI-driven alerts and faster root cause analyses
- AI-driven alerts for fraud detection and anomaly detection, claims triage with image search, and the surfacing of relevant policy and customer data to inform underwriting decisions

Study participants described faster time to useful AI products, better grounding for generative responses, and improved business outcomes when AI experiences draw on accurate indexed data at scale.

Interviewed organizations provided examples of AI enablement with the Elasticsearch Platform:

Vector search to support underwriting decision-making (VP of Technology, Insurance, Canada):

"We're using vector search in claims to search through image embeddings that support claims documents. In underwriting, vector databases enable semantic understanding of complex policy documents and customer history to support underwriting decisions much faster and better than manual-driven processes."

Access to better content and contextual answers (VP of AI and Analytics, Software, the United States):

"The old way of finding documents, which was fragmented and self-hosted, is being upgraded into an AI-driven method. AI experiences across the platform are powered by the Elasticsearch Platform's semantic search capabilities, enabling sellers to retrieve relevant content and contextual answers at scale."

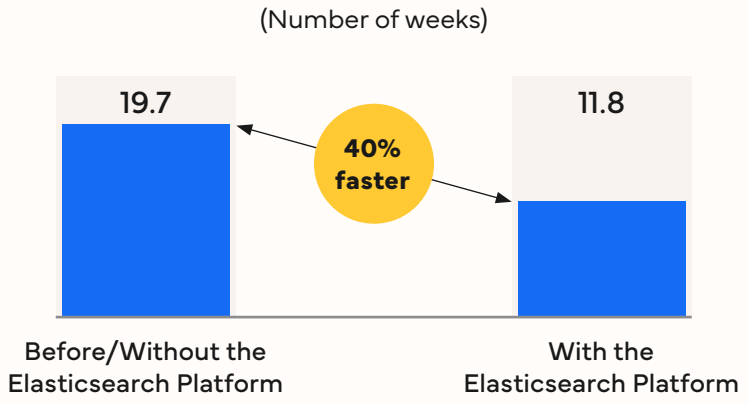
Foundation for agent-based AI (Director of IT, Retail, the United States):
"The Elasticsearch Platform is a big part of moving into [agentic] AI. We're grounding responses in accurate indexed data and improving the quality of generative responses without relying solely on generative reasoning. Hybrid search combines keyword filters with semantic understanding."

Better AI models for AI use cases (Principal Applications Engineer, Financial Services, the United Kingdom):
"AI-specific cases include detecting outlier transactions and fraud patterns. We use AI models to generate alerts and create dashboards. The Elasticsearch Platform helps us prompt, generate queries, and retrieve results more efficiently."

Speed to a viable AI product is a critical business metric for study participants because it determines how quickly they can test, learn, and capture value from new AI use cases. IDC found that the Elasticsearch Platform has reduced time to minimum viable AI products by 40% on average, shaving off almost eight weeks, moving them from concept to the real-world use of AI faster and with purpose **(Figure 2, below).**

Figure 2

Time to Minimum Viable AI Product



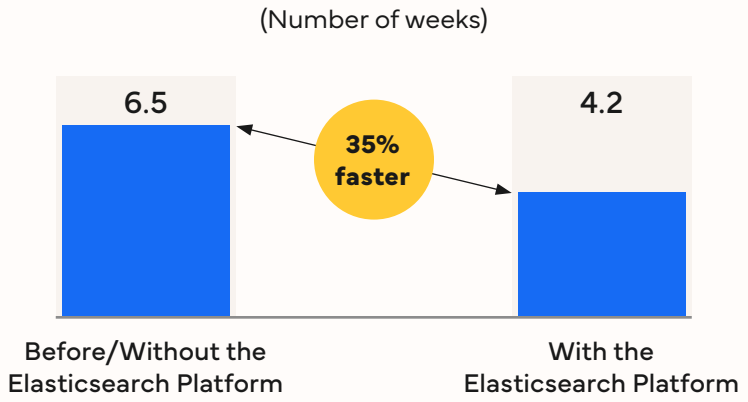
n = 11; Source: IDC Business Value In-Depth Interviews, March 2026

After AI product launch, interviewed organizations also benefited from faster iteration with the Elasticsearch Platform, which is essential for keeping their AI products accurate, useful, and aligned to changing data and requirements. IDC found that the Elasticsearch

Platform reduced time to update AI products by an average of 35%, enabling quicker refinement and expansion of live AI use cases, including agentic AI-focused applications and use cases, by speeding up data time to production and removing search as a bottleneck **(Figure 3, below).**

Figure 3

Time to Update AI Product



n = 11; Source: IDC Business Value In-Depth Interviews, March 2026

Improved Search and AI Relevance, Accuracy, and Performance

At the foundation of many benefits that study participants experienced using the Elasticsearch Platform is a step change in search performance. Interviewed organizations reported making their enterprise search capabilities materially faster, more accurate, and more dependable with the Elasticsearch Platform. Across customer, employee, and operational use cases, better indexing and semantic retrieval have reduced null results, cut the time users spend constructing manual queries, and made it easier to reach relevant answers on the first attempt. These improvements with the Elasticsearch Platform have mattered not only for classic search activities but also for AI-assisted experiences that depend on high-quality retrieval to ground responses and minimize hallucinations. As a result, study participants have increased the usability of search query results, which serves to enable data-driven services and solutions and day-to-day employee work.

Study participants further connected search capability improvements to broader business execution benefits. Faster and more relevant retrieval of data and information has helped users carry out their day-to-day activities more efficiently. Interviewed organizations connected semantic, hybrid, and vector search capabilities of the Elasticsearch Platform to better search outcomes in terms of accuracy and relevance. These operational gains have extended the value of search well beyond the search box itself. Improved search performance has also helped organizations reduce incidents and manage application reliability more effectively.

Interviewed customers spoke in detail about search-related improvements achieved with the Elasticsearch Platform:

Faster searches and more relevant results (Director of IT, Healthcare, the United States):
"Before, the time required per search was about three minutes. With Elasticsearch Platform, it's five to seven seconds. The quality of search results improved from 65–75% relevant to 97–98%, and null results dropped from around 20–22% to about 8–10%."

Improved search capabilities driving core business improvement (VP of Technology, Insurance, Canada):
"In our claims area, we're able to triage cases faster by searching through images more accurately and precisely than our previous self-built environment. In underwriting, we identify lower-risk customers much faster through search. In IT observability, we close incidents more quickly and reduce downtime because of improved search capabilities."

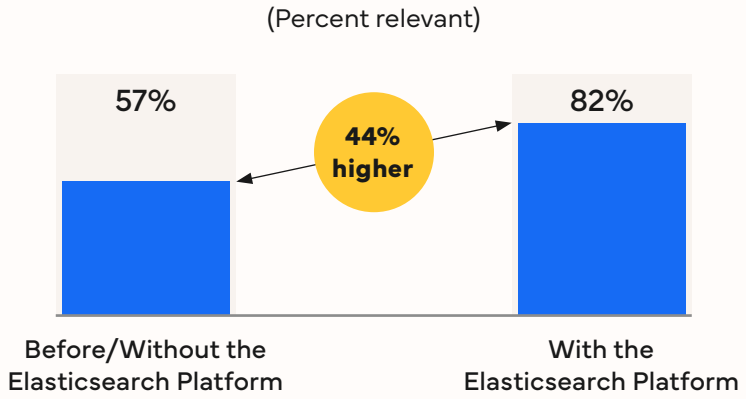
Fewer and less impactful search-related issues (VP of AI and Analytics, Software, the United States):
"We reduced major search-related issues from 10 per year to 1 or 2. We've lowered mean time to recovery and reduced the engineering bandwidth needed to support search infrastructure by around two-thirds. Elastic Cloud gives us the scalability to serve tens of millions of searches per week."

Improved Search Quality and Relevance

Study participants have materially improved the quality and relevance of search results with the Elasticsearch Platform, a prerequisite for maximizing the value of operational data and creating AI value. IDC found that study participants have increased the share of search queries that yield relevant results by 44% on average, which means that users are obtaining more dependable answers that they can apply to meet business problems while also reducing wasted search effort **(Figure 4, next page).**

Figure 4

Impact on Quality and Relevance of Search Results



n = 11; Source: IDC Business Value In-Depth Interviews, March 2026

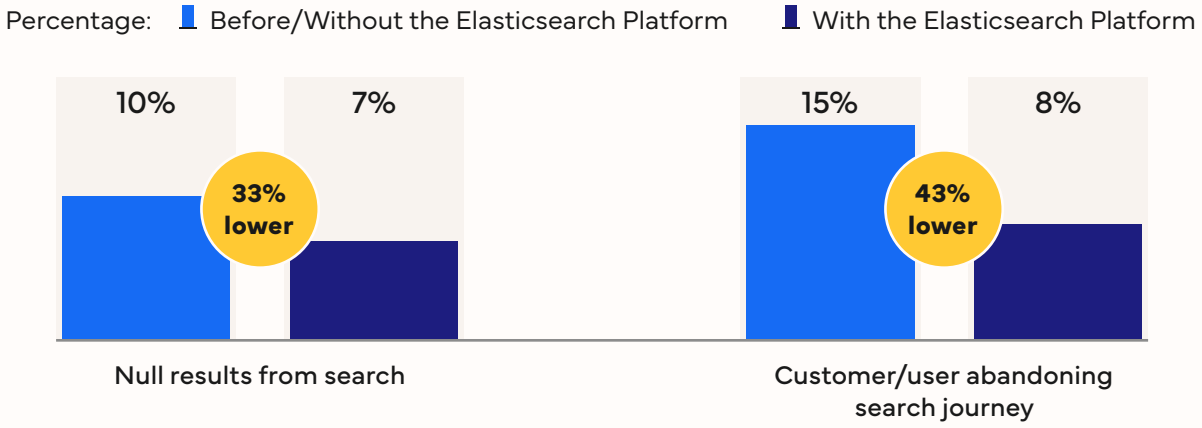
Improved Search Outcomes

In addition to increased search relevance, study participants emphasized the importance of faster searches and more robust search functionality compared with their largely point solution and homegrown-based previous environments. They linked these improvements to higher search completion rates by reducing dead ends, with the frequency of null search results dropping by 33% on average. One interviewed United States retail customer noted, *"The quality of search results improved from about 30% relevant before to around 90% with the Elasticsearch Platform. Null results dropped from 10–15% to roughly 5%."* Better search results lead to increased user engagement, with study participants reporting a 43% reduction in search abandonment on average. A United Kingdom financial services organization commented, *"Consumers are seeing responses much more quickly. Search result quality improved by 10–20%, and search abandonment decreased by about 20% because results are faster."* As **Figure 5 (next page)** shows, these improvements in null results and abandonment rates enable users to stay within the search journey and reach answers more efficiently.

Figure 5

Impact on Search Outcomes

See the figure data in an accessible table format.



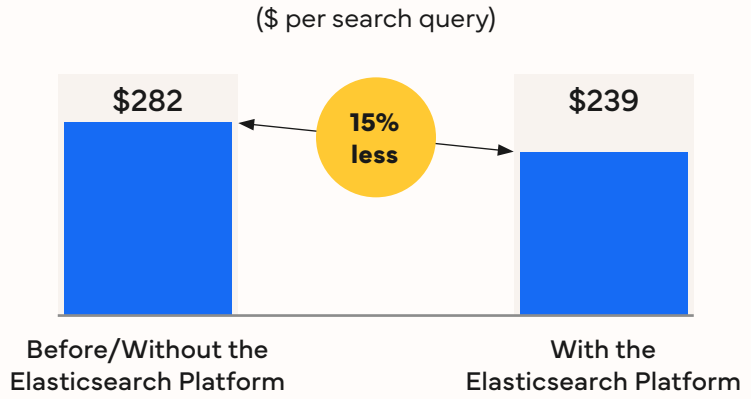
n = 11; Source: IDC Business Value In-Depth Interviews, March 2026

Improved Search and AI Economics

In addition to enhanced search functionality, the Elasticsearch Platform has improved search-related economics by enabling greater search volumes (18% higher on average) as required by study participants' businesses without commensurate cost increases. This has brought down the average cost required to run each search, helped integrate enhanced search capabilities into day-to-day operations, and fostered the development of new AI-driven services and products. IDC found that study participants reduced cost per search query by 15%, reflecting more scalable architecture, lower support burden, and better tooling efficiency with the Elasticsearch Platform **(Figure 6, next page).**

Figure 6

Impact on Cost per Search Query



n = 11; Source: IDC Business Value In-Depth Interviews, March 2026

Revenue Uplift from Improved Customer Experience

The business impact of AI enablement extended beyond productivity to substantial revenue gains tied to new AI-driven offerings and better customer experiences enabled through search and support. An interviewed retail customer commented, *"Even beyond revenue impact, the Elasticsearch Platform improves productivity across departments. Without Elastic, everyone would be 30–40% less productive. It's extremely impactful for cross-system debugging and anomaly detection across microservices."* As **Table 3 (next page)** shows, study participants attributed $52.26 million in higher annual revenue per organization to AI-related gains (0.35% higher revenue per average organization) and another $26.39 million to improved customer experience (an additional 0.18% higher revenue per average organization). These revenue gains reflect the extent to which the Elasticsearch Platform has helped study participants (which have the overall profile of a large enterprise with significant established businesses) deliver solutions and services that better match their customers' needs and therefore unlock substantial additional revenue from both an absolute and relative perspective.

Table 3

Revenue Gains

Gains	Per Organization	Per AI-Driven Search/GenAI Product, Service, and Use Case
AI-Related Revenue Gains		
Higher annual revenue	**$52.26M**	$939,900
Operating margin assumption	15%	15%
Calculated higher net annual revenue	$7.84M	$141,000
Improved Customer Experience		
Higher annual revenue	$26.39M	$474,600
Operating margin assumption	15%	15%
Calculated higher net annual revenue	$3.96M	$71,200

n = 11; Source: IDC Business Value In-Depth Interviews, March 2026

Study participants have leveraged these search improvements to deliver a better experience to customers and maintain lean support operations. An interviewed retail customer explained, *"For SEO and content intelligence, we use the Elasticsearch Platform to detect thin content at scale, identify cannibalization, and find core web vital regressions tied to traffic loss. That protects revenue and prevents performance degradation."* Across the customer sample, interviewed organizations attributed 14% average increases in customer satisfaction to their use of the Elasticsearch Platform, as well as 5% higher average customer retention rates. Further, they reported improving customer support team efficiency levels by an average of 22%, equivalent to $1.19 million in staff time savings per organization. These gains reflect an improved customer experience in terms of delivery and the support that dedicated teams provide to customers with questions or challenges **(Table 4, next page).**

Table 4

Impact on Customer Satisfaction and Customer Support Teams

Impact	Before/ Without the Elasticsearch Platform	With the Elasticsearch Platform	Difference	Benefit
Customer satisfaction rate (1–10)	6.3	7.2	0.9	**14%**
Equivalent team members required, FTEs per organization	76.0	59.0	17.0	**22%**
Equivalent value of staff time	$5.32M	$4.13M	$1.19M	**22%**

n = 11; Source: IDC Business Value In-Depth Interviews, March 2026

Enterprisewide Productivity Gains and Efficiencies from Search

Interviewed organizations connected improvements in search quality and speed achieved with the Elasticsearch Platform to measurable enterprisewide productivity gains. These gains accrued in terms of more employees conducting actionable searches, employee day-to-day time savings and productivity gains, and team efficiencies such as customer support and help desk teams. These efficiencies stem from employees finding information faster, relying more on self-service, and spending less time running manual searches or waiting for support. Better search relevance and lower search latency shorten the time required for activities such as analytics, troubleshooting, content retrieval, and policy or knowledge lookups while also making AI chatbots and support tools more useful in day-to-day workflows.

These time savings and efficiencies were not limited to individual users. Study participants reported efficiency improvements for help desks, customer support teams, and line-of-business groups because more questions were resolved accurately on the first pass, fewer searches escalated to manual support, and staff could shift time from repetitive response work to higher-value activities.

Interviewed organizations provided examples of these search-related benefits:

Reduced time spent searching (IT Manager, Government, Canada):

"Our employees are saving up to 75% of the time they used to spend searching. In a week, that can be around eight hours per person. Instead of broad, unfocused searches, they now get faster, more relevant results with the Elasticsearch Platform."

Less time spent on baseline analytics and queries (Director of IT, Healthcare, the United States):

"Employees are probably saving two to three hours each per week. The time they spend running analytics or queries has significantly come down. Operationally, everything is centralized in one platform, which improves visibility and scalability across teams."

Improved operational performance (Director of IT, Healthcare, the United States):

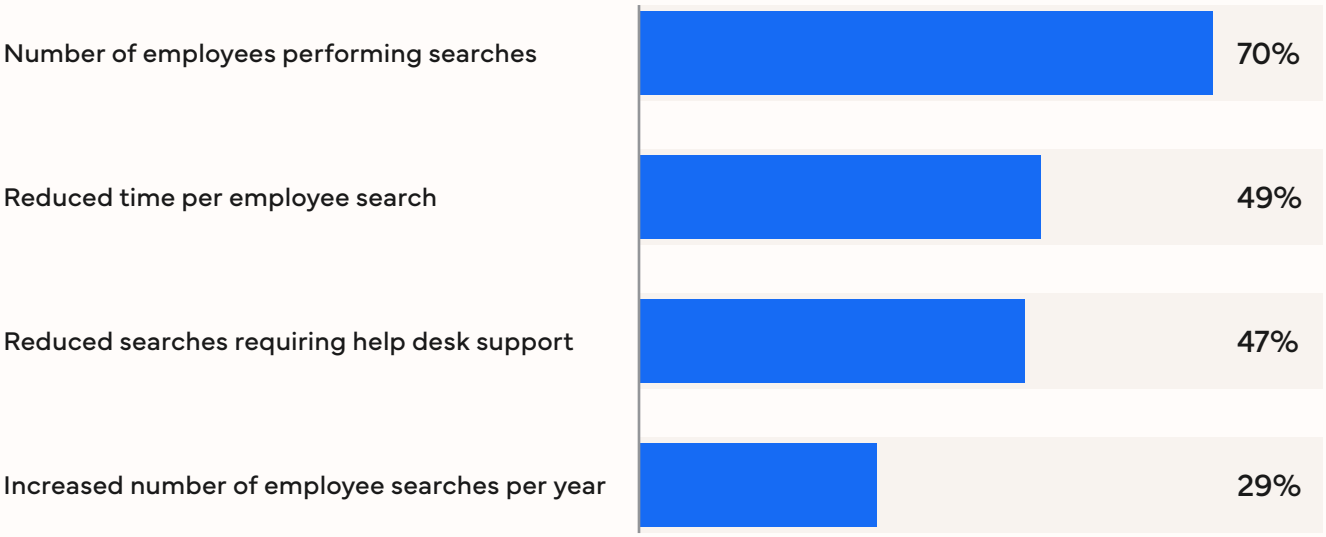
"Query latency is much improved with the Elasticsearch Platform by minimizing cross data set searches and consolidating tools, as well as fast data ingestion … Searches that used to take around three minutes are now five to seven seconds, which materially improves operational performance."

Interviewed customers reported that their internal search efforts have become materially more efficient and more broadly used because of the Elasticsearch Platform. These results indicate that better search relevance and speed have encouraged adoption, rather than merely speeding up existing workflows. As **Figure 7 (next page)** shows, these improvements are not marginal; study participants reported 70% more employees performing searches and 29% more employee searches overall, alongside 49% less time per search and 47% fewer searches requiring help desk support. These results indicate both higher adoption and greater efficiency in search use.

Figure 7

Impact on Internal Search KPIs

(Percent improvement after using the Elasticsearch Platform)



n = 11; Source: IDC Business Value In-Depth Interviews, March 2026

Study participants connected improved search capabilities with the Elasticsearch Platform to meaningful productivity gains across significant numbers of employees. As **Table 5 (next page)** shows, study participants have realized an 8% improvement in productivity for employees who conduct search queries on a regular basis as part of their day-to-day responsibilities, **or the equivalent of a significant 150 hours of increased productivity per year per impacted employee** (based on an average 8% productivity gain with an average number of working hours of 1,880 per year), resulting in $2.06 million in net productivity gains with a 15% margin applied.

Table 5

Employee Productivity Impact, Improved Search

Impact	Before/ Without the Elasticsearch Platform	With the Elasticsearch Platform	Difference	Benefit
Productivity level, impacted employees, FTEs per organization	2,463	2,659	196	8%
Net productivity level, impacted employees, FTEs per organization	2,463	2,493	29	1%
Value of equivalent net productivity	$172.43M	$174.49M	$2.06M	1%

n = 11; Source: IDC Business Value In-Depth Interviews, March 2026

More accurate, intuitive search results with the Elasticsearch Platform have also reduced the burden on internal help desk teams that support employees when searches fail or return weak results. An interviewed retail customer noted: *"From the chatbot use case alone, we're probably saving close to 80 hours a week manually answering tickets. Those resources are now shifted to more critical areas rather than routine responses."* On average, IDC calculates that study participants have achieved 19% more efficiency for their internal search help desk teams with the Elasticsearch Platform, which is approximately $736,400 in savings a year **(Table 6, below).**

Table 6

Help Desk Support, Internal Searches

Impact	Before/ Without the Elasticsearch Platform	With the Elasticsearch Platform	Difference	Benefit
Equivalent team members required, FTEs per organization	39.4	32.0	7.4	19%
Equivalent value of staff time	$3.94M	$3.20M	$736,400	19%

n = 11; Source: IDC Business Value In-Depth Interviews, March 2026

New AI products and use cases that are delivered faster and have enhanced functionality with the Elasticsearch Platform have also improved the output of employees. IDC found a 13% gross productivity improvement for impacted employees from new AI products and use cases, equal to a 2% net productivity gain for a significant number of employees **(Table 7, below).**

Table 7

Employee Productivity Impact, New AI Products/Use Cases

Impact	Before/ Without the Elasticsearch Platform	With the Elasticsearch Platform	Difference	Benefit
Productivity level, impacted employees, FTEs per organization	429	486	57	**13%**
Net productivity level, impacted employees, FTEs per organization	429	438	9	**2%**
Value of equivalent net productivity	$30.03M	$30.63M	$596,800	**2%**

n = 11; Source: IDC Business Value In-Depth Interviews, March 2026

Developer and IT Productivity

Additionally, the Elasticsearch Platform has also helped development teams build, modify, and deploy AI-enabled search use cases more effectively. IDC calculates a 27% improvement in development team productivity, which reflects increased value for development operations in AI use case development and more broadly **(Table 8, next page).**

Table 8

Impact on Development Team Productivity

Impact	Before/ Without the Elasticsearch Platform	With the Elasticsearch Platform	Difference	Benefit
Productivity level, FTEs per organization	14.1	17.9	3.8	**27%**
Value of equivalent net productivity	$1.41M	$1.79M	$376,000	**27%**

n = 11; Source: IDC Business Value In-Depth Interviews, March 2026

Platform Efficiencies

Interviewed organizations also described the Elasticsearch Platform as an efficient operating foundation for enterprise search because it consolidates search, observability, and AI-related capabilities into a consolidated but scalable environment that is easier to manage than fragmented tools. Centralized visibility, faster access to logs and telemetry, and simpler ongoing administration reduced the effort required to run the platform. In IDC's analysis, these efficiencies translated into 33% lower search platform management effort, resulting in substantial management efficiencies for study participants and the opportunity to potentially shift these resources to more strategic activities **(Table 9, next page).**

Table 9

Search Platform Team Efficiencies

Efficiencies	Before/ Without the Elasticsearch Platform	With the Elasticsearch Platform	Difference	Benefit
Equivalent team members required, FTEs per organization	7.5	5.0	2.5	**33%**
Equivalent value of staff time	$750,000	$500,000	$250,000	**33%**

n = 11; Source: IDC Business Value In-Depth Interviews, March 2026

Further, built-in controls and monitoring capabilities of the Elasticsearch Platform support compliance-oriented work such as investigations, access review, and audit readiness. An interviewed Canadian insurance company explained, *"We're able to automate identity and access management tasks with the Elasticsearch Platform. If we detect unusual access patterns, we automatically lock accounts and force password resets. That significantly reduces security risk and manual intervention."* On average, study participants reported that their compliance teams are 21% more efficient with the Elasticsearch Platform through better anomaly detection, faster investigations, and more accurate search answers **(Table 10, below).**

Table 10

Compliance Team Efficiencies

Efficiencies	Before/ Without the Elasticsearch Platform	With the Elasticsearch Platform	Difference	Benefit
Equivalent team members required, FTEs per organization	18.4	14.6	3.8	**21%**
Equivalent value of staff time	$1.29M	$1.03M	$266,300	**21%**

n = 11; Source: IDC Business Value In-Depth Interviews, March 2026

Increased Operational Resilience

Study participants also attributed increased operational resilience to their use of the Elasticsearch Platform by giving teams faster visibility into logs, transactions, alerts, and other system signals that are essential for understanding what is happening across complex environments. Study participants noted leveraging the observability capabilities of the Elasticsearch Platform in two ways: general infrastructure and log analytics and the monitoring of search and AI applications. From an AI perspective, they take advantage of functionalities such as AI-generated alerts, AI-driven root cause analyses, and AI-driven self-healing. Interviewed organizations have used this visibility and these capabilities to investigate anomalies, identify root causes, and resolve incidents faster, particularly in production systems where downtime, latency, or missed service levels have immediate business consequences.

These capabilities improved not just troubleshooting speed but also the stability of the environments being managed. Interviewed organizations reported achievements such as better SLA attainment, reduced downtime, and materially faster data recovery windows because search-driven observability helped teams move from reactive investigation toward faster detection and intervention. Interviewed Elasticsearch customers provided examples of these availability and performance benefits:

The ability to meet more SLAs, driven by faster search and incident resolution (VP of Technology, Insurance, Canada):

"We're able to meet our SLA 95% of the time now, whereas before, we were only meeting it about 90% of the time. Faster search capabilities allow us to close incidents more quickly and reduce downtime."

Better root cause analysis, improving application performance (Principal Applications Engineer, Financial Services, the United Kingdom):

"If any application is going down, we are using the Elasticsearch Platform to find the root cause. We're able to remediate issues faster than we did before, which improves overall application performance."

Reduced downtime with better monitoring and search visibility (Director of IT, Retail, the United States):

"We've seen about a half-percent reduction in downtime. Improved monitoring and search visibility allow us to identify and resolve issues faster, which has a measurable impact on uptime and operational stability."

ROI Analysis

IDC's analysis of the financial benefits and investment costs for study participants' use of the Elasticsearch Platform is provided in Table 11. As the table shows, IDC calculates that interviewed organizations will realize three-year average discounted benefits of $31.20 million per organization ($561,200 per AI-driven search/GenAI product, service, and use case) compared with three-year discounted investment costs of $5.06 million ($91,000 per AI-driven search/GenAI product, service, and use case). These levels of benefits and costs would yield an average three-year ROI of 517%, with breakeven on investment occurring in an average of 11 months. These results demonstrate the extent to which study participants have been able to use the Elasticsearch Platform to achieve considerable positive net value through business enablement and operational efficiencies **(Table 11, below).**

Table 11

Three-Year ROI Analysis

ROI Analysis	Per Organization	Per AI-Driven Search/GenAI Product, Service, and Use Case
Discounted benefits	$31.20M	$561,200
Discounted investment costs	$5.06M	$91,000
Net present value	$26.14M	$470,200
Return on investment	**517%**	**517%**
Payback	**11 months**	**11 months**
Discount factor	12%	12%

n = 11; Source: IDC Business Value In-Depth Interviews, March 2026

Challenges/Opportunities

The market for AI-enhanced search is evolving quickly, creating competitive pressure for platforms such as the Elasticsearch Platform. New and established search vendors, as well as enterprise applications and content solutions, continue to introduce semantic, vector, and conversational search capabilities, making differentiation more complex and accelerating innovation cycles. As point-solution vector databases and specialized AI-search tools proliferate, enterprises face a more fragmented landscape and must evaluate platforms not only on performance but also on integration and architectural fit.

Data-security and governance requirements present additional hurdles. Organizations are indexing larger volumes of unstructured and sensitive data, while hybrid and multi-cloud environments increase exposure to cyber risks. IDC research shows rising concerns around data protection and compliance for AI-driven search, prompting buyers to demand stronger access controls, auditability, and safeguards against unintended data exposure, particularly as AI introduces new risk exposure related to content accuracy and response integrity.

Enterprises also face operational challenges in deploying and maintaining advanced search capabilities. Implementing semantic and vector search, tuning relevance, managing data ingestion, and integrating LLMs require skills that many IT teams are still developing. Another top driver in the build-versus-buy conversation is the availability of internal talent, impacted by the competition for resources between AI and other IT and digital technology initiatives.

Modern search expectations, such as contextual relevance, personalization, and conversational interaction, raise complexity further, especially for organizations modernizing legacy environments or consolidating siloed data sources. These factors can slow adoption and increase reliance on external expertise.

As enterprises scale their AI and agentic deployments, the infrastructure question becomes an opportunity to invest in a platform that consolidates the full stack with a retrieval engine, the ability to monitor behavior and model performance with built-in observability, and secure access at the field and document levels through RBAC, ABAC, and LDAP. As agents operate autonomously, the risk can grow exponentially. A platform that handles all three layers offers IT a foundation where they can build and deploy at scale.

Conclusion

Organizations that deployed the Elasticsearch Platform reported consistent improvements in search quality, response times, and the ability to retrieve accurate, context-aware information. These gains translated into higher productivity for employees and developers, fewer support escalations, improved customer and end-user experiences, and better operational insight through integrated observability. Most notably, participating organizations achieved meaningful business value with financial uplift, including higher net revenue, lower operational costs, and broad efficiency gains across IT, support, and compliance functions, realizing $13.43 million in annual benefits on average, with a 517% three-year ROI and an 11-month payback period.

These results reflect the Elasticsearch Platform's ability to address core challenges that organizations face as data volumes grow, systems fragment, and AI-driven workloads expand. Interviewed users highlighted ongoing constraints around search relevancy, latency, visibility, and the operational complexity of building and maintaining AI-enabled experiences, particularly as they integrate semantic search, vector retrieval, and retrieval-augmented generation into core applications.

By unifying enterprise search, vector and semantic capabilities, LLM and RAG integration, observability, and data security capabilities within a single environment, the Elasticsearch Platform simplifies how organizations build and scale AI-driven experiences. The platform supports multimodal data ingestion, relevance tuning, and document-level security. It also monitors search and GenAI behaviors, allowing organizations to modernize search and implement AI applications more efficiently and with reduced operational risk.

Customers also attributed value to reduced development cycle times, faster iteration on AI features, and the flexibility to scale new search and GenAI use cases, reflecting the platform's abilities as an enterprise search foundation and a context and retrieval layer for AI enablement.

Appendix A: IDC Business Value Methodology

The IDC Business Value practice conducts research and analysis to quantify the impact of technology products and solutions on end-user organizations from financial, operational, and business perspectives. These studies are based on primary research with end-user organizations, including in-depth interviews and survey-based data collection. Findings are derived using IDC's standardized Business Value methodology, ensuring consistency and comparability across studies. The methodology used in this study aligns with and follows IDC Business Value team practices and standards.

IDC utilized its Business Value methodology for this IDC Business Value white paper. This methodology is based on gathering data from organizations that are currently using the Elasticsearch Platform as the foundation for the model. Based on interviews with these study participants, IDC has calculated the benefits and costs to these organizations related to their use of the Elasticsearch Platform. IDC conducted its quantitative analysis for this study by gathering benefit information during the interviews using a before-and-after assessment of the impact of using the Elasticsearch Platform. In this study, the benefits included higher net revenue, employee time savings and productivity gains, development team productivity gains, and other cost and staff efficiencies.

Other IDC Business Value assumptions are summarized as follows:

- Time values are multiplied by burdened salary (salary + 28% for benefits and overhead) to quantify efficiency and manager productivity savings. For the purposes of this analysis, based on the geographic locations of the interviewed organizations, IDC has used its standard Business Value assumptions of an average fully loaded $100,000 per year salary for IT staff members and an average fully loaded salary of $70,000 for non-IT staff members. IDC assumes that employees work 1,880 hours per year (47 weeks x 40 hours).
- IDC applied a 15% margin assumption in calculating the net value of revenue gains that were included in the financial model. Likewise, IDC applied a margin assumption to productivity gains achieved by line-of-business employees due to their use of the Elasticsearch Platform.
- The net present value of the three-year savings is calculated by subtracting the amount that would have been realized by investing the original sum in an instrument yielding a 12% return to allow for the missed opportunity cost. This accounts for both the assumed cost of money and the assumed rate of return.
- Because IT solutions require a deployment period, the full benefits of the solution are not available during deployment. To capture this reality, IDC prorates the benefits on a monthly basis and then subtracts the deployment time from the first-year savings.

Note: All numbers in this document may not be exact due to rounding.

Appendix B: Summary of Financial Benefits

Table 12 (below) provides an overview of the specific categories of value that study participants have achieved by using the Elasticsearch Platform. As the table shows, these benefits total an annual average of $13.43 million per interviewed organization ($241,600 per AI-driven search/GenAI product, service, and use case, with an average of 56 use cases per organization) in the categories of value shown below.

Table 12

Summary of Average Annual Financial Benefits

Category of Value	Average Quantitative Benefit	Calculated Average Annual Value per Organization (11 Organizations)	Calculated Average Annual Value per AI-Driven Search/ GenAI Product, Service, Use Case (56 Use Cases)
Business Benefits: Higher Net Revenue	N/A	$9.18M	$165,000
Higher net revenue, AI enablement*	$52.26M higher revenue per year, 15% margin	$6.10M	$109,700
Higher net revenue, other enablement*	$26.39M higher revenue per year, 15% margin	$3.08M	$55,400
User Productivity Benefits	N/A	$3.20M	$57,500
Higher user productivity, AI enablement*	13% higher productivity, 56.8 FTEs, $70,000 salary	$464,200	$8,300
Higher user productivity, internal searches*	8% higher productivity, 196 FTEs, $70,000 salary	$1.60M	$28,800
Customer support team efficiencies	22% efficiency, 17.0 FTEs, $70,000 salary	$925,800	$16,700
Compliance team efficiencies	21% efficiency, 3.8 FTEs, $70,000 salary	$207,100	$3,700

Table 12 continued next page

Table 12 continued from previous page

Category of Value	Average Quantitative Benefit	Calculated Average Annual Value per Organization (11 Organizations)	Calculated Average Annual Value per AI-Driven Search/ GenAI Product, Service, Use Case (56 Use Cases)
IT Staff Productivity Benefits	N/A	$1.06M	$19,100
Search platform management efficiencies	33% efficiency, 2.5 FTEs, $100,000 salary	$194,400	$3,500
Help desk team efficiencies	19% efficiency, 7.4 FTEs, $100,000 salary	$572,800	$10,300
Development team productivity gains	27% higher productivity, 3.8 FTEs, $100,000 salary	$292,900	$5,300
Total annual benefits	**$13.43M per organization, with $241,600 AI-driven search/GenAI product, service, and use case (56 use cases average per organization)**		

Note: includes 8 months deployment time in year one

* 15% margin assumption applied

n = 11; Source: IDC's Business Value In-Depth Interviews, March 2026

Appendix C: Accessible Data Tables

This appendix provides an accessible version of the data for any complex figures in this document. Click "Return to figure" to get back to the original figure.

Figure 5 accessible data

Impact on Search Outcomes

Impact	Null Results from Search	Customer/User Abandoning Search Journey
Before/Without the Elasticsearch Platform	10%	15%
With the Elasticsearch Platform	7%	8%
Difference	**33% lower**	**43% lower**

n = 11; Source: IDC Business Value In-Depth Interviews, March 2026

Return to figure

About the IDC Analysts

Amy Machado

Senior Research Manager,
Content and Knowledge Discovery Strategies, IDC

Amy Machado is a senior research manager for IDC's Content and Knowledge Discovery Strategies program. She examines the evolution of the content and unstructured data supply chain and its impact on mission-critical operations. Driven by demand for using data to make business decisions and building AI-ready data sets, modern technologies are creating new opportunities for automation and insights for what has traditionally been locked in undefined, unstructured data. Machado's coverage includes enterprise content management, content sharing and collaboration, knowledge discovery, knowledge management, intelligent document processing, and customer communications management software. She uses primary research to size, forecast, and segment these application markets.

More about Amy Machado →

Matthew Marden

Research Vice President,
Business Value Strategy Practice, IDC

Matthew Marden is responsible for carrying out custom business value research engagements and consulting projects for clients in several technology areas, focusing on determining the return on investment of their use of enterprise technologies. Marden's research often analyzes how organizations are leveraging investment in digital technology solutions and initiatives to create value through efficiencies and business enablement.

More about Matthew Marden →

Message from the Sponsor

We are proud to support this research and hope the findings help technology and business leaders make informed decisions about their search and AI investments.

At Elastic, we understand that as enterprises scale their AI initiatives, the ability to retrieve accurate, context-aware information has become a defining factor in whether AI delivers business value. This IDC research demonstrates the impact that a strong search and retrieval foundation can have across revenue, productivity, and operational resilience.

The Elasticsearch Platform serves as this foundation, unifying enterprise search, context retrieval, observability, and security in a single, scalable environment.

— The Elastic Team

Learn more about the Elasticsearch Platform

IDC Custom Solutions

IDC Custom Solutions produced this publication. The opinion, analysis, and research results presented herein are drawn from more detailed research and analysis that IDC independently conducted and published, unless specific vendor sponsorship is noted. IDC Custom Solutions makes IDC content available in a wide range of formats for distribution by various companies.

This IDC material is licensed for external use and in no way does the use or publication of IDC research indicate IDC's endorsement of the sponsor's or licensee's products or strategies.

IDC.com | IDC on LinkedIn | IDC Blog

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries. IDC's analysis and insight help IT professionals, business executives, and the investment community make fact-based technology decisions and achieve their key business objectives.