



# Artificial Analysis

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AI Adoption Survey – H1 2025

## Highlights Report

Full report available with AI Trends Subscription

**Artificial Analysis** is a leading and independent AI benchmarking and insights provider. We support engineers and companies to understand AI capabilities and make critical decisions about their AI strategies.

Our data, insights and publications are grounded in our comprehensive benchmarking of AI technologies and use cases. This includes everything from hourly performance testing of Language Models APIs to millions of votes in our crowd-sourced evaluations.

Our public website, [artificialanalysis.ai](https://artificialanalysis.ai), is widely referenced throughout the AI industry. To discuss this report, our publications or our services, please contact us at [contact@artificialanalysis.ai](mailto:contact@artificialanalysis.ai).



# Artificial Analysis AI Trends Subscription: Comprehensive AI market intelligence for enterprise decision-making from the leading AI benchmarking company

## Overview of Artificial Analysis AI Trends Subscription

This report

### A | Quarterly State of AI Report

*The definitive quarterly update on AI market developments*

- Technical trends at each layer of the AI stack: agents, models, infrastructure, hardware
- Deep-dives into agentic use-cases
- Market maps and performance rankings for hundreds of key players

### B | AI Adoption Survey

*Real-world adoption insights from those building and deploying AI*

- Enterprise use case patterns
- Enterprise adoption benchmarks
- Developer priorities and pain points
- Model, inference and hardware provider demand by industry

### C | Topic Updates

*Timely briefs on emerging markets and breakthrough products*

- Analysis Briefs (data-driven overviews of particular products)
- State of AI: China - our detailed benchmarking report on the progress of the top Chinese AI players across AI segments

### D | Databooks & API

*Direct access to the industry's most comprehensive data*

- Comprehensive AI performance data - source data for all our analysis
- Intelligence, performance, cost, preference voting, survey data and more
- Excel databooks and API access

### E | Quarterly AI Trends Workshop

*Connect market intelligence to your strategic priorities*

- Live quarterly briefing with Artificial Analysis research team (two hours)
- What's working now: insights from leading SF startups and enterprises
- Deep dives tailored to your business priorities (e.g., coding agent best practices, inference economics, upcoming chips)

### F | Ongoing Team Access

*Direct access to our research team*

- Access to the Artificial Analysis team for time-sensitive questions and clarifications between workshops

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groq

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SambaNova  
SYSTEMS

TechCrunch

WSJ



OECD  
BETTER POLICIES FOR BETTER LIVES

Meta

cerebras



Mistral AI



Tencent 腾讯



VentureBeat

The Economist

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# This is the Highlights Version of the AI Adoption Survey Report, the Premium Version is available to subscribers of our AI Trends Subscription

## Highlights Version (this)

- ✓ **AI adoption** maturity of organizations and popular internal use cases
- ✓ Popular **AI Chat Applications and Coding Assistants** in H1 2025
- ✓ Popular **LLM families in H1 2025**, based on current use or consideration
- ✓ Leading **speech, image, and video models** and selection criteria
- ✓ Leading **first-party and third-party inference providers**

## Premium Version (AI Trends Subscription)

*Includes everything in the Highlights Version plus:*

- ✓ **AI adoption maturity by** sector, region, and organization size
- ✓ **Expected uses cases** by sector, region and AI adoption maturity
- ✓ **Planned adoption of AI Agents** by business function in the next 12 months
- ✓ **LLM-family market share** by region, and sector, including demand for reasoning models
- ✓ **Demand for Chinese LLMs** by region, sector and organization size
- ✓ **Market share of AI Chat Applications and Coding Assistants** by sector and region
- ✓ **Demand for LLM fine-tuning and pre-training** including key drivers and challenges
- ✓ **Inference provider market share** by sector and region, including selection criteria
- ✓ **Training and inference hardware market share** by sector

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## 6 key trends stand out in our H1 2025 AI Adoption Survey



### AI reaches production

*~45% of organizations report using AI in production*



### Engineering and R&D is the frontrunner use case

*66% are considering AI for Engineering / R&D, Customer Support and Sales & Marketing follow*



### Google, xAI, DeepSeek gain share since 2024

*~80% are using/ considering Google Gemini, 53% DeepSeek & 31% xAI Grok*



### Companies are increasingly diversifying AI use

*Average number of LLMs used/ considered by organizations is ~4.7*



### Organizations are taking different approaches to Build vs. Buy

*32% of respondents favor building; 27% buying and 25% a hybrid approach*



### Organizations are open to Chinese models, if hosted outside of China

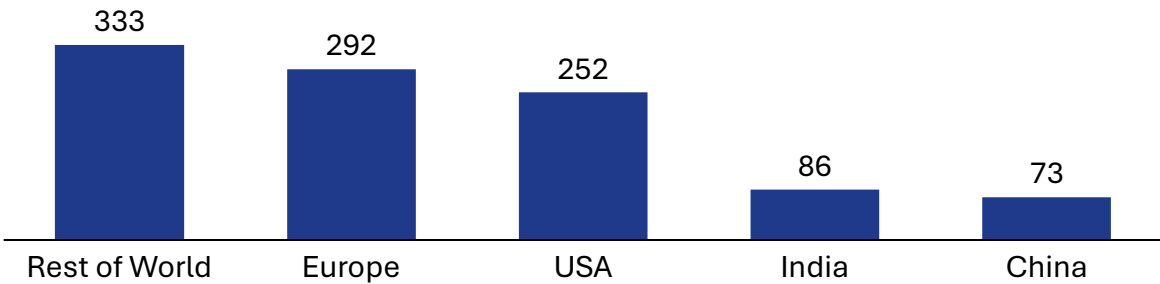
*55% of respondents would be willing to use LLMs from China-based AI labs, if hosted outside of China*

# The Artificial Analysis H1 2025 AI Adoption Survey collected responses from 1,000+ users of AI to develop market-leading insights on the latest trends in AI adoption & use

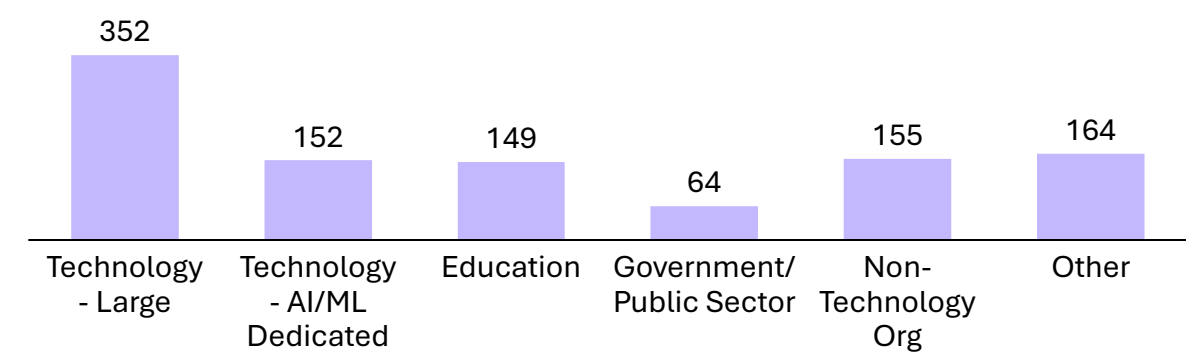
## Artificial Analysis AI Adoption Survey respondents

Where are you currently based? How large is your current employer? What is your current role? What type of organization do you currently work at? N=1036

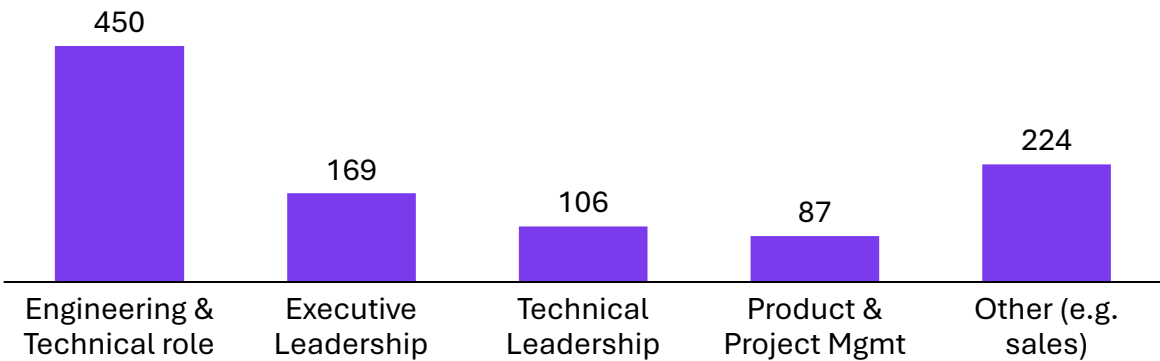
### Region



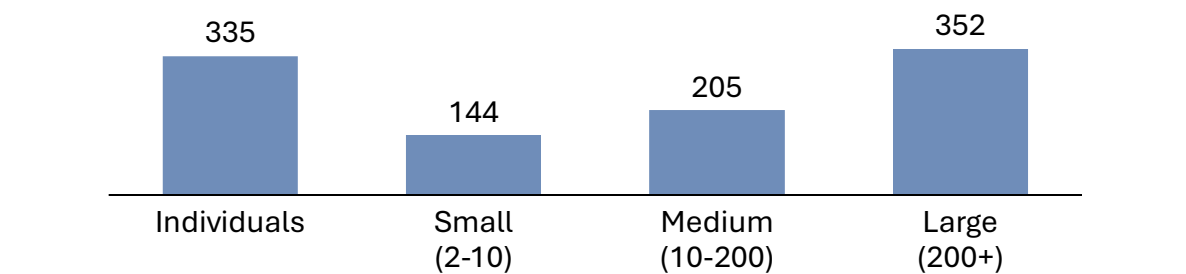
### Sector



### Role



### Organization Size



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## AI Adoption Survey – H1 2025

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1. AI Adoption & Use Cases	Analysis of organizational AI adoption stages and planned use cases across different business functions
2. Language Models	Overview of LLM family preferences, Chinese model adoption attitudes, and fine-tuning practices
3. Speech, Image, & Video	Examination of multimodal AI model usage across content generation platforms and applications
4. Inference Services	Analysis of provider preferences, access methods, and deployment challenges including cost and performance
5. Training & Hardware	Review of hardware choices for training and inference workloads across different vendor ecosystems

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01

# AI Adoption & Use

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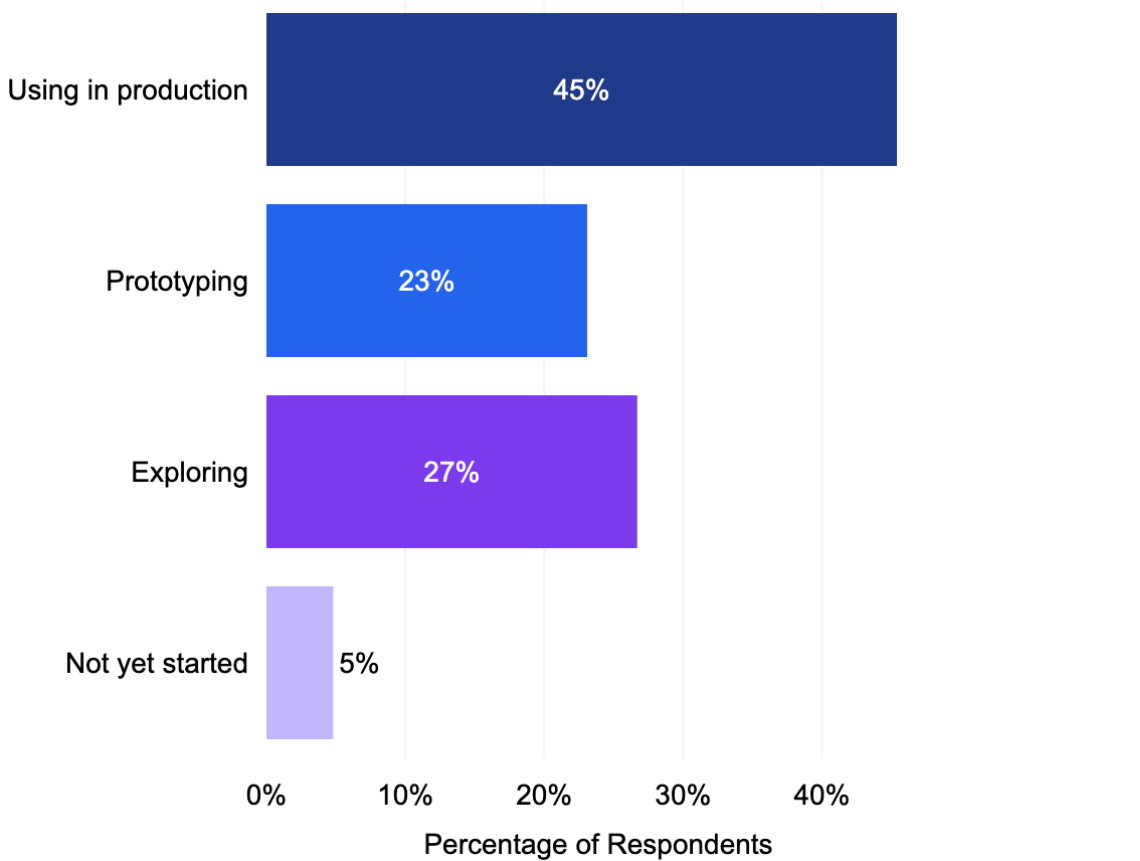
AI Adoption Survey – H1 2025



**Maturity:** AI adoption is moving past prototyping to production, with 45% of respondents using AI in production; organizations are opting to either buy or build AI

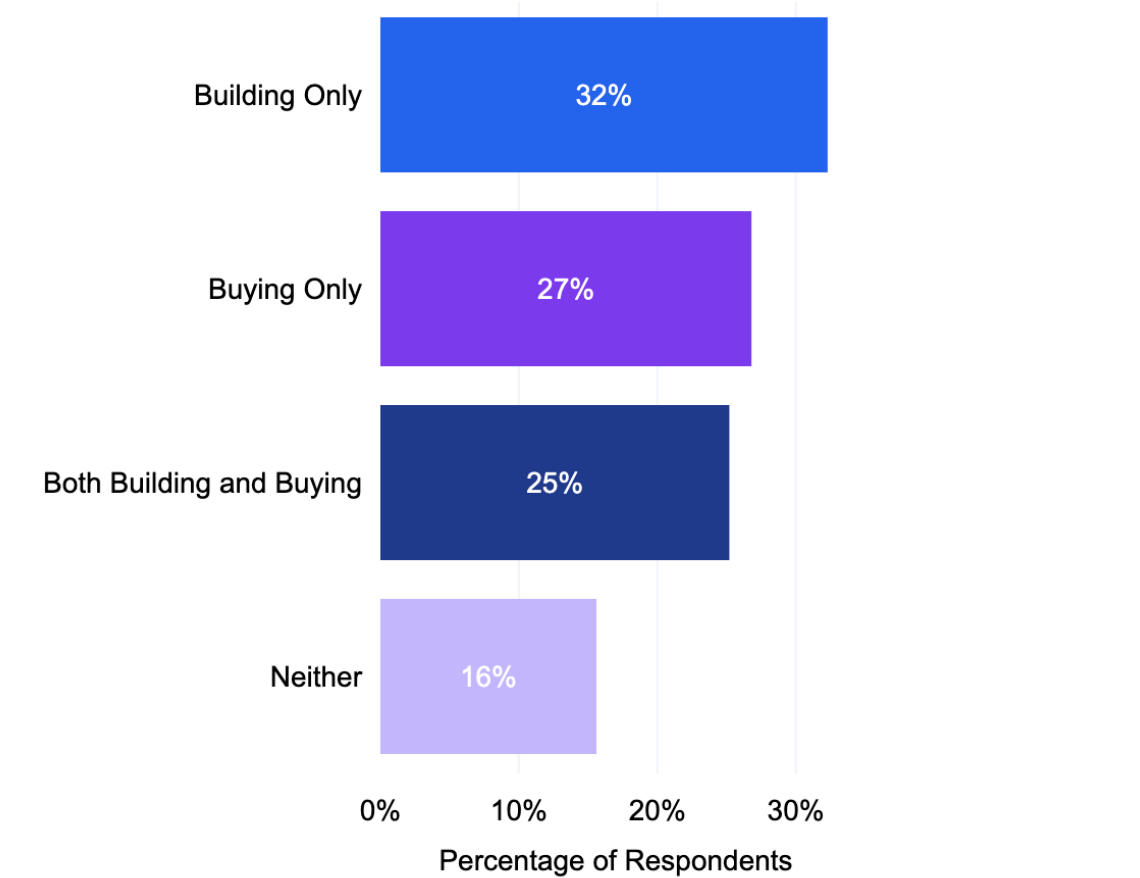
Adoption of AI by Organizations

Where are you currently in your AI journey? N=1036



Demand for Building vs Buying AI

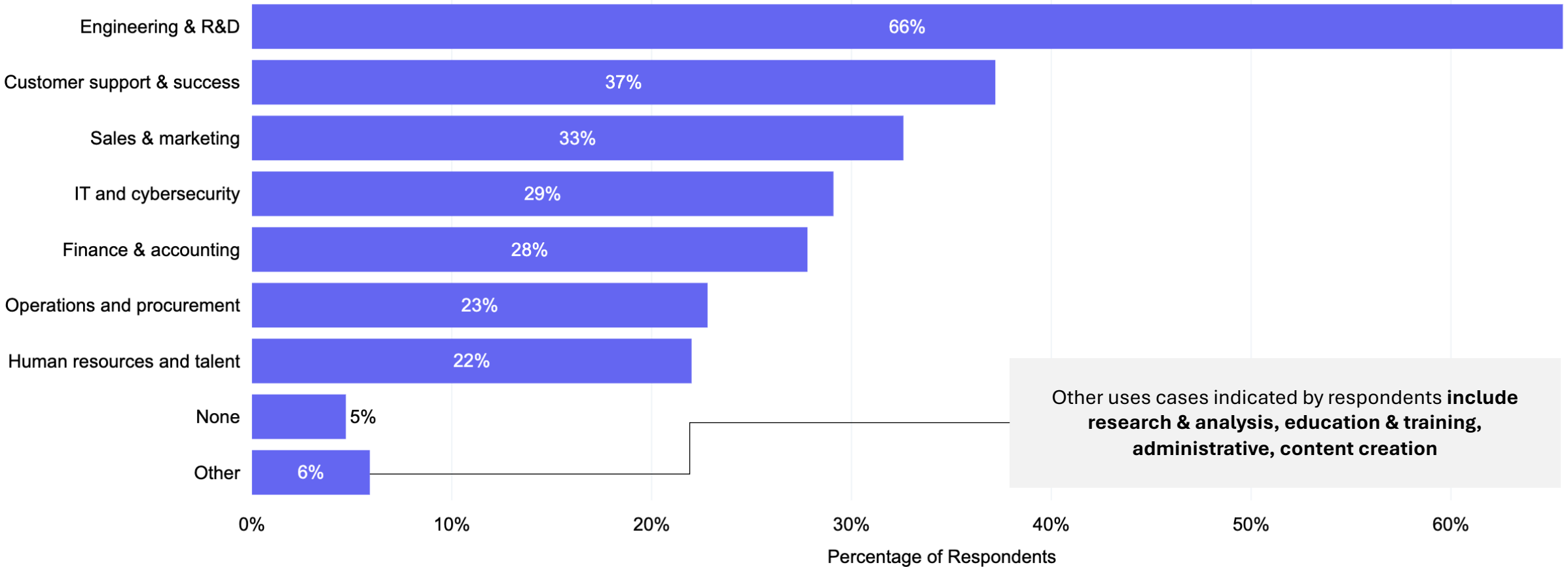
Are you building or buying AI based applications? N=1036



**Use Cases:** Engineering & R&D stands as the clear frontrunner for AI adoption, cited by 66% of organizations, while Customer Support and Sales are the next most cited domains

**Expected Internal AI Use Cases Over Next 12 Months**

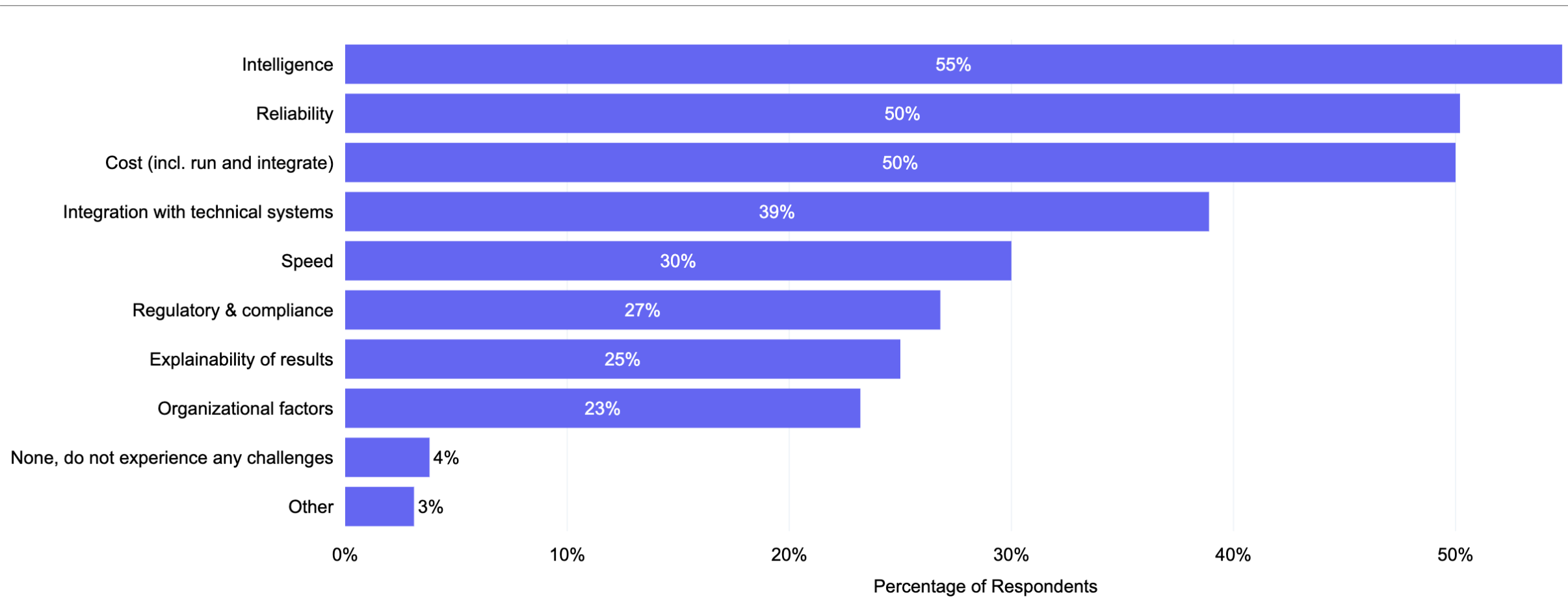
Where do you expect you will use AI in the next 12 months (internal use cases)? N=960 (excludes respondents who mentioned they will use AI externally only)



# Key Challenges: Intelligence, reliability and costs are the most common challenges, faced by at least 50% of organizations using AI

## Key Challenges Faced When Using AI

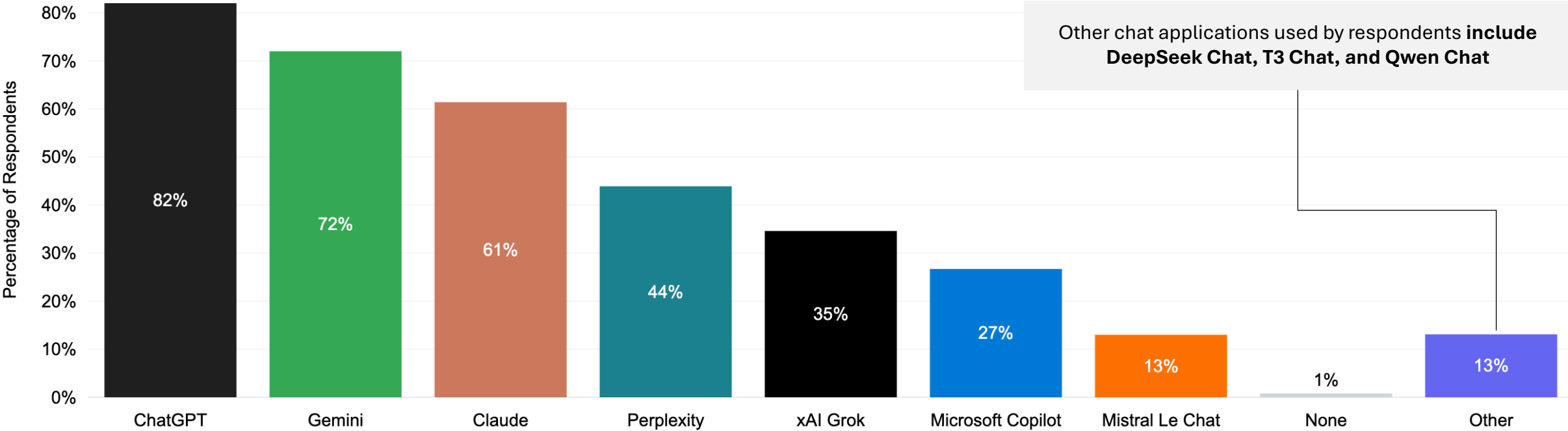
What are the key challenges you face in using AI? N=1006



# AI Chat Applications: ChatGPT leads as the most popular AI chat application, closely followed by Gemini and Claude

## Share of Respondents using AI Chat Application

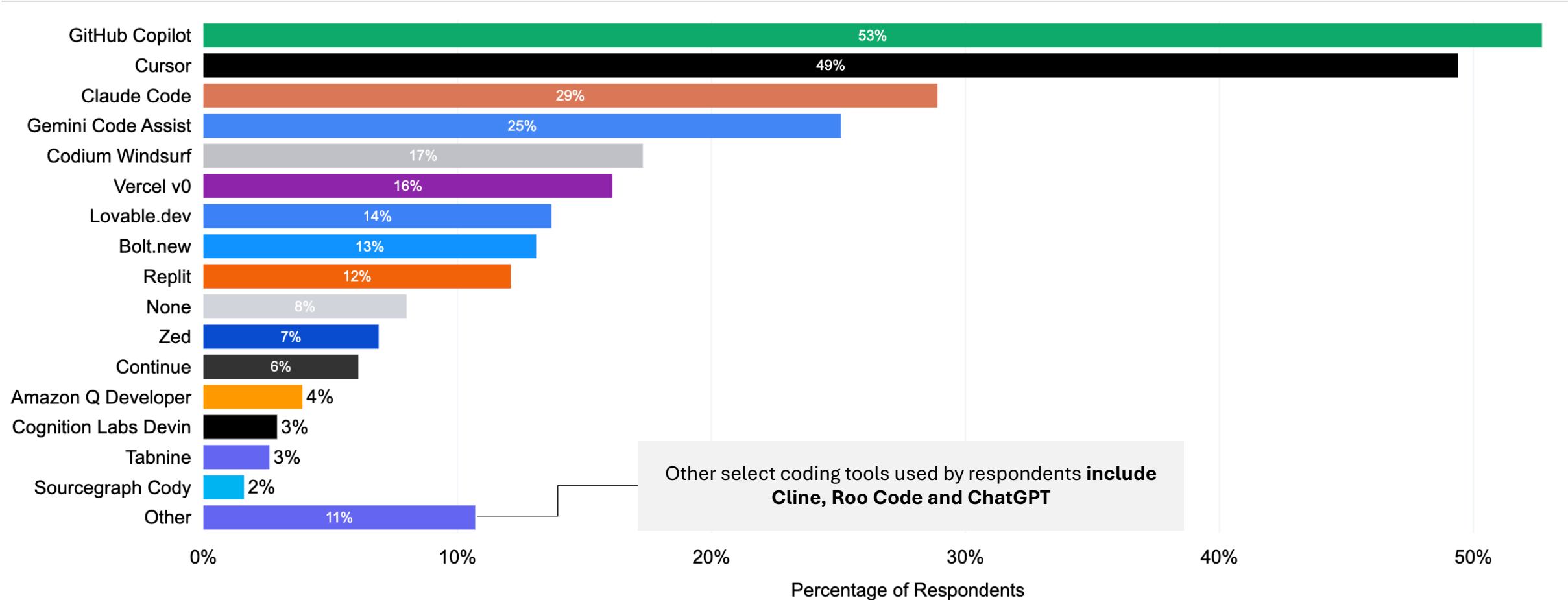
Which AI chat applications are you using or considering using this year? N=974



# AI Coding Tools: GitHub Copilot and Cursor dominate the market as the most popular AI coding tools, with a significant lead over Claude Code and Gemini Code Assist

## Demand for Coding Tools

Which AI tools are you using or considering using this year? N=955





# 02 **Language Models**

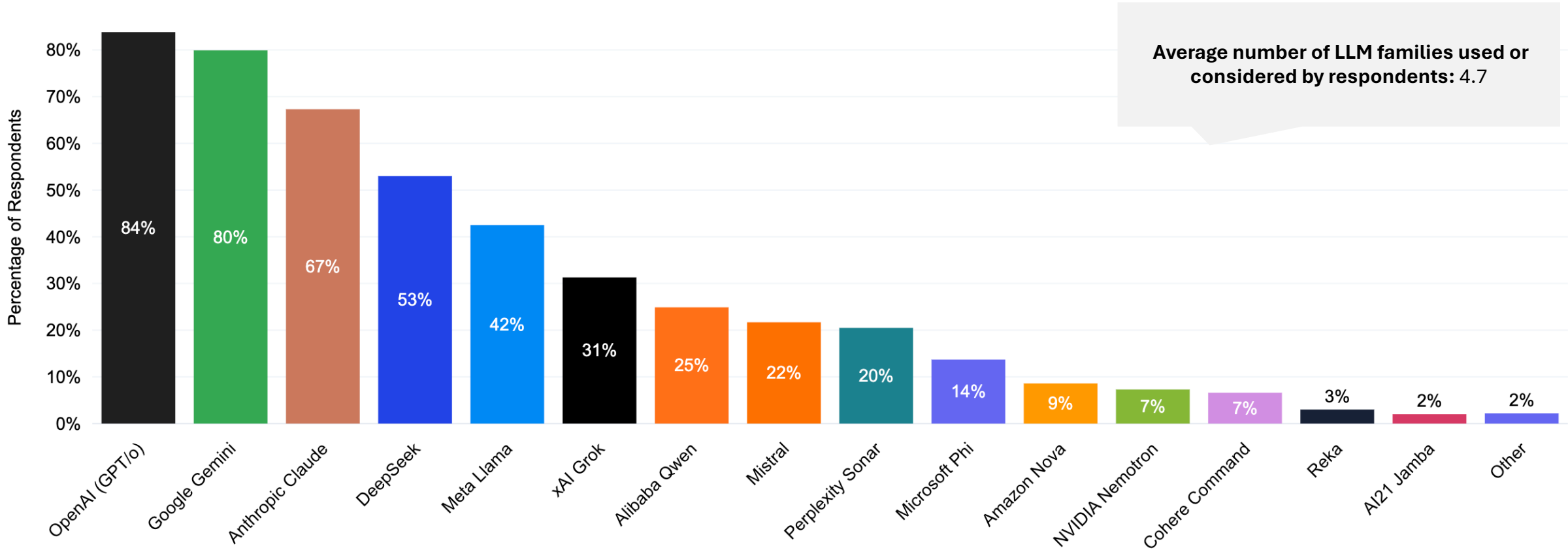
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AI Adoption Survey – H1 2025

**Models:** Google Gemini & OpenAI GPT/o model families are clear leaders considered by ~80% of AI developers; DeepSeek is the preferred open weights option

**Demand for LLM Families**

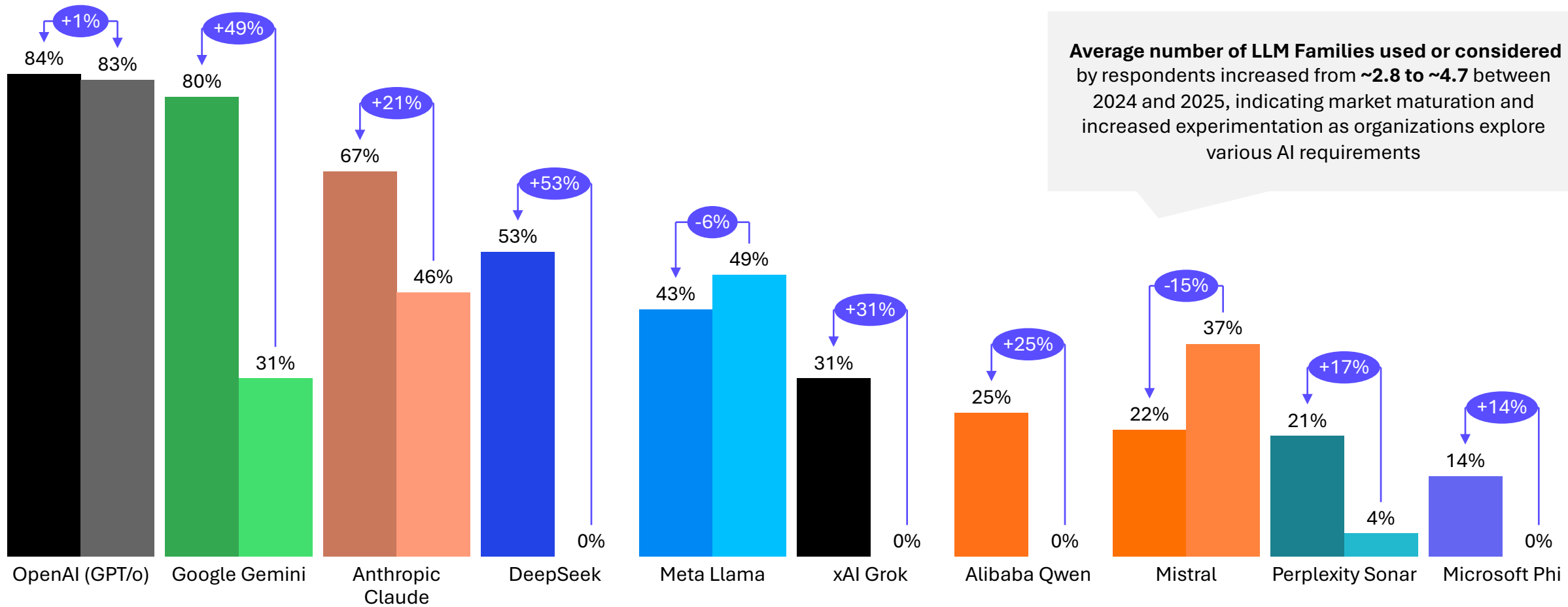
Which LLM families are you using or considering using? N=591



**Models:** Over the past year, OpenAI has maintained its lead, Google Gemini and DeepSeek have surged, and Meta Llama and Mistral have fallen

**Demand for Top 10 LLM Families in May 2025**

Which LLM families are you using or considering using? N=270 (2024) and 591 (2025)

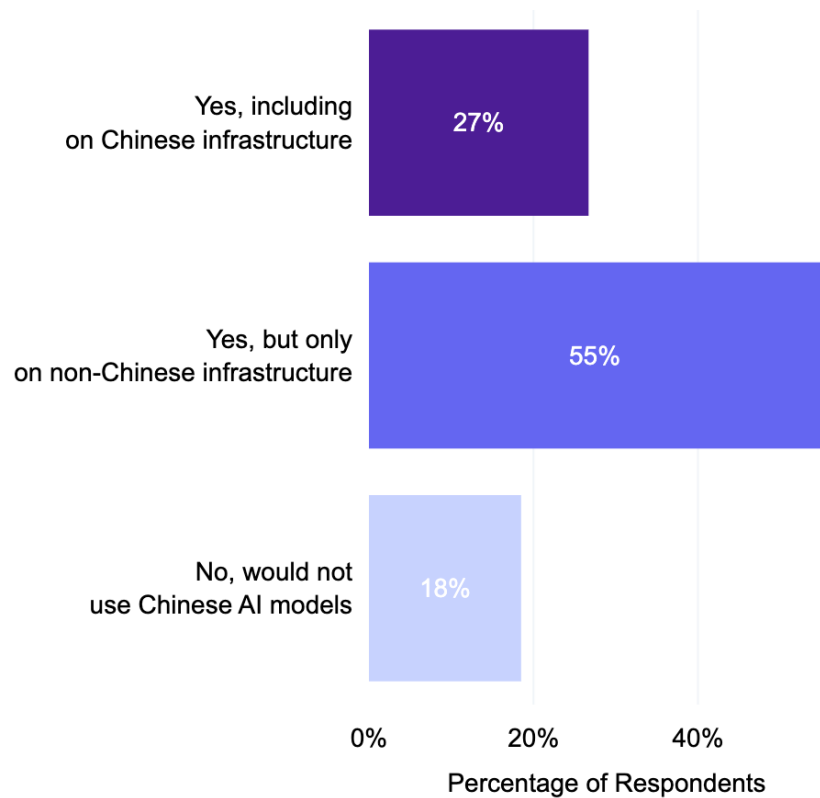




# Chinese Models: Most organizations are willing to use AI models from China if they are hosted on infrastructure outside of China

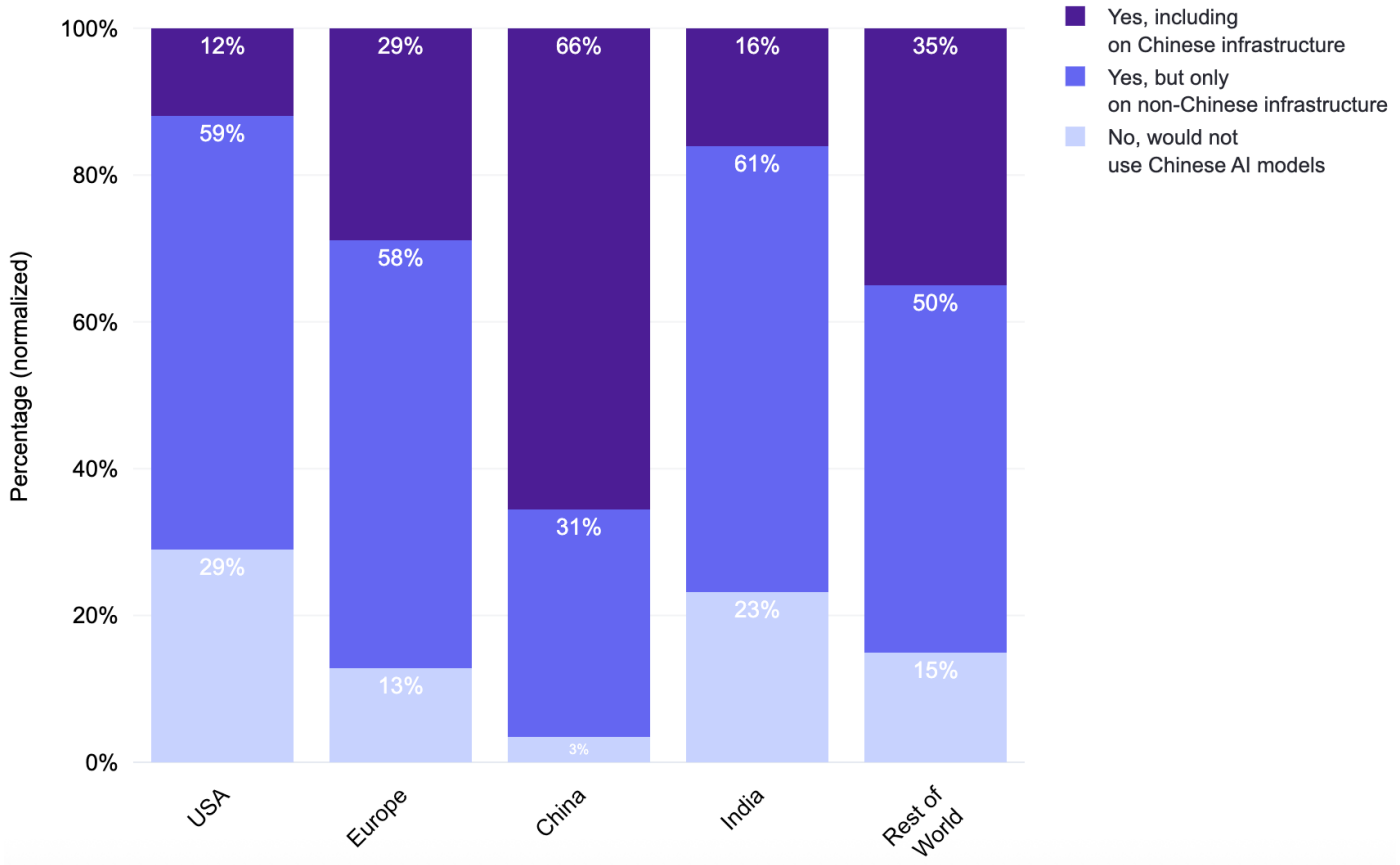
## Willingness to use Chinese LLMs

Would you be willing to use LLMs from Chinese AI labs? N=574



## Willingness to use Chinese LLMs, by Region

Would you be willing to use LLMs from Chinese AI labs? N=574





03

## Speech, Image, and Video

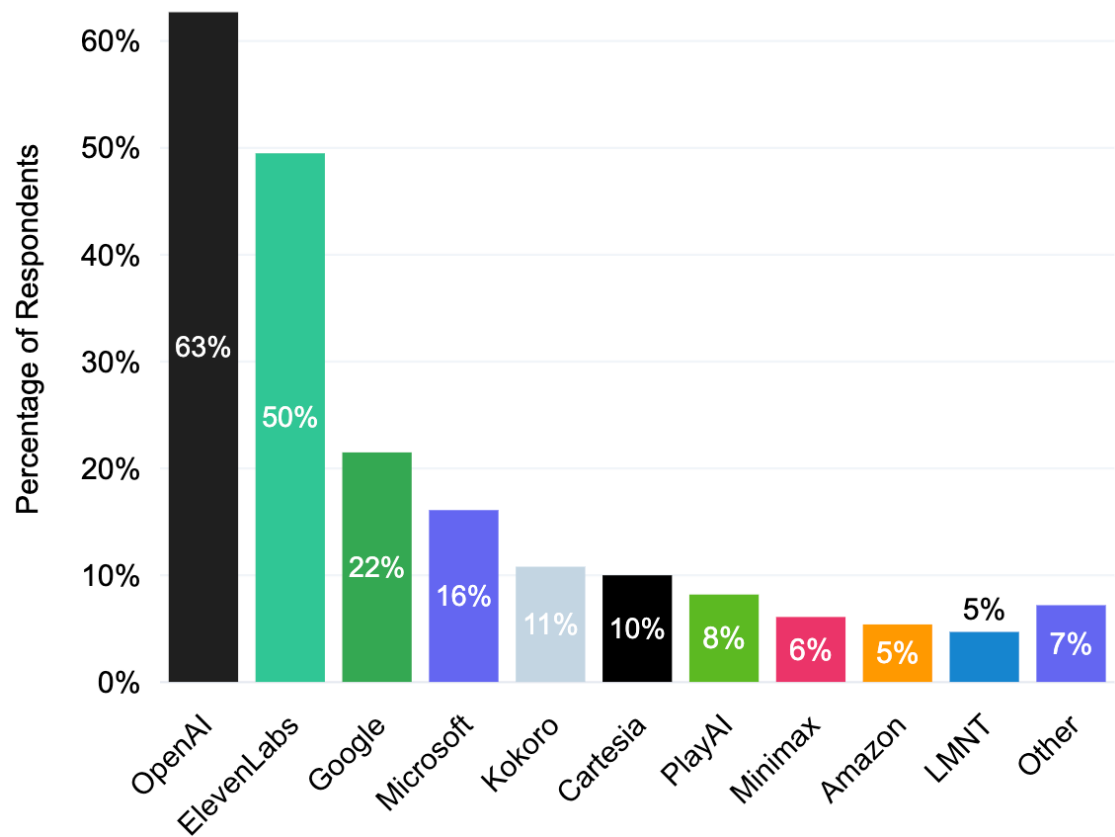
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AI Adoption Survey – H1 2025

# Speech: OpenAI and ElevenLabs have the most popular speech generation models with large gap to peers; streaming quality, natural voice, & latency are the most important factors

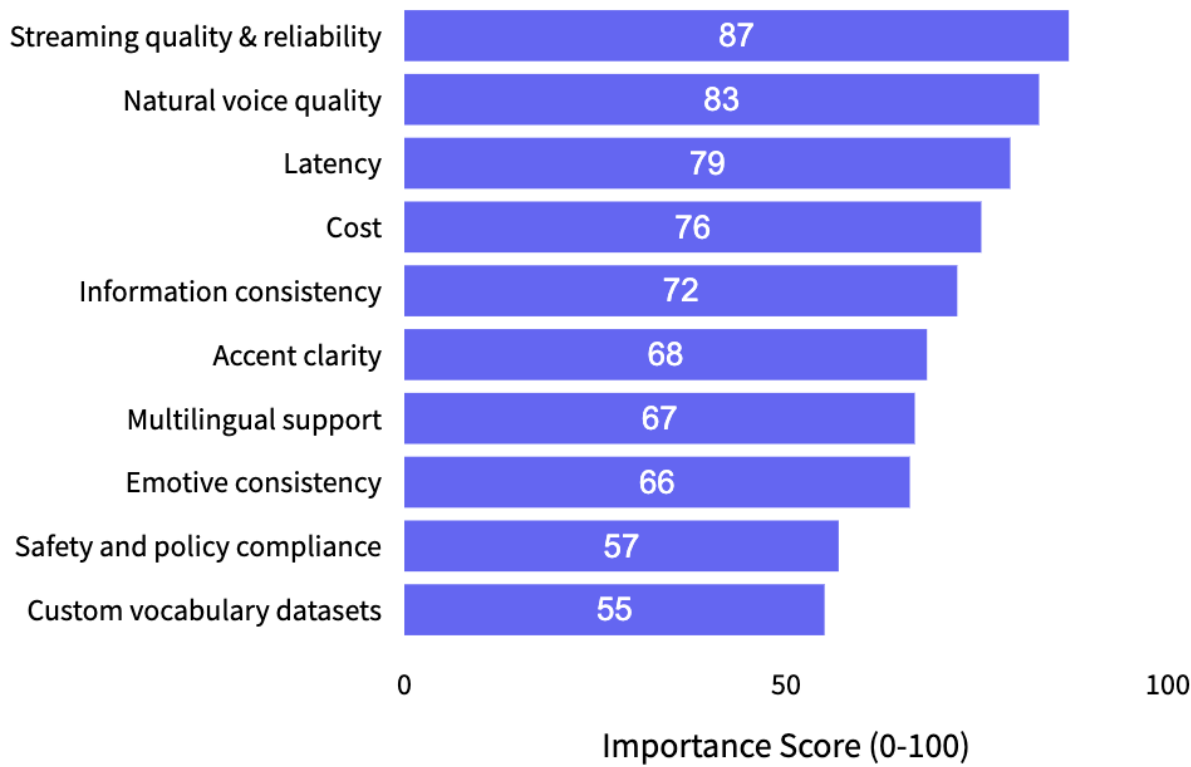
## Demand for Speech Generation Models

Which models are you using for speech generation? N=279



## Key Factors for Selecting Speech Generation Models

How important are the following criteria when selecting Speech generation models<sup>1</sup>? N=269

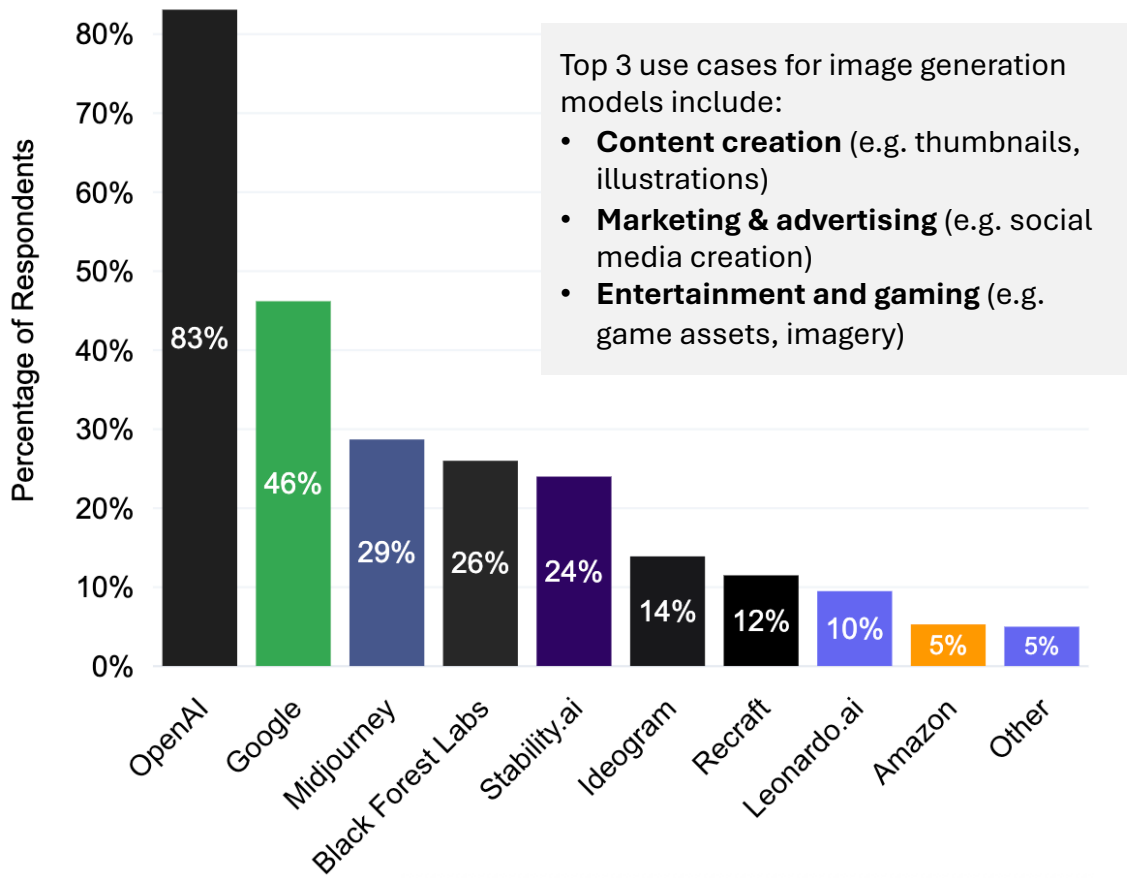


1. Respondents were asked to choose if each criteria was Critically Important, Considered but not a priority or Not considered. Each of the three options are assigned 100, 50 and 0 points respectively

**Image:** OpenAI is the clear leader for image generation models; users of image generation value prompt adherence as the #1 most important factor

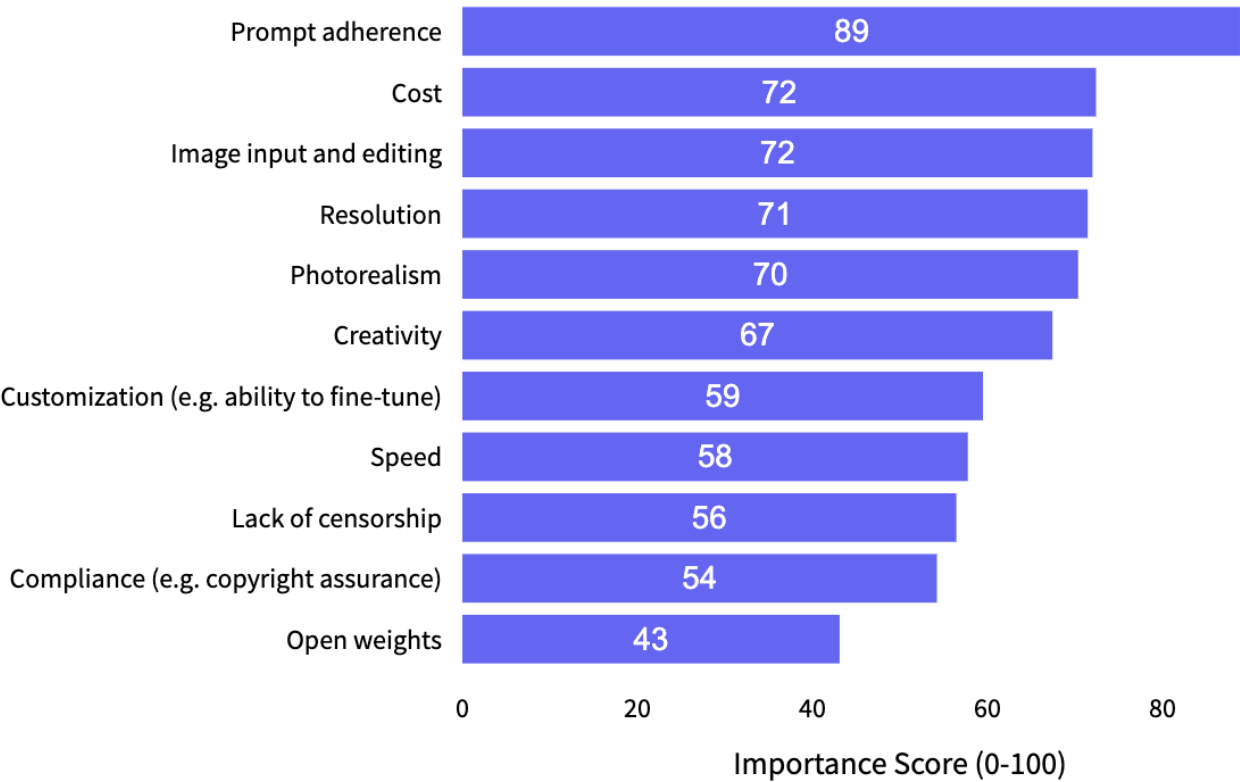
Demand for Image Generation Models

Which models are you using for image generation? N=338



Key Factors for Selecting Image Generation Models

How important are the following criteria when selecting image generation models<sup>1</sup>? N=312

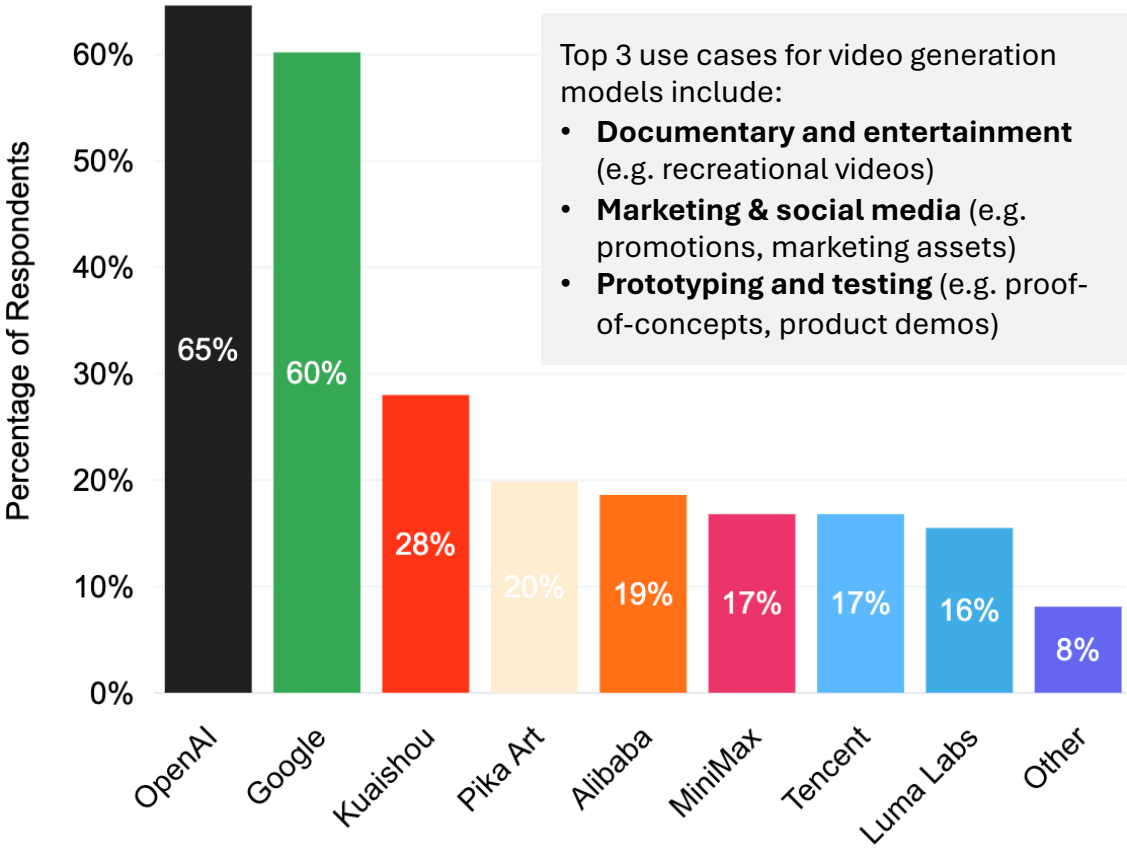


1. Respondents were asked to choose if each criteria was Critically Important, Considered but not a priority or Not considered. Each of the three options are assigned 100, 50 and 0 points respectively

# Video: OpenAI and Google lead video generation by a large margin, with users highlighting prompt adherence and realism as the most important factors for selecting models

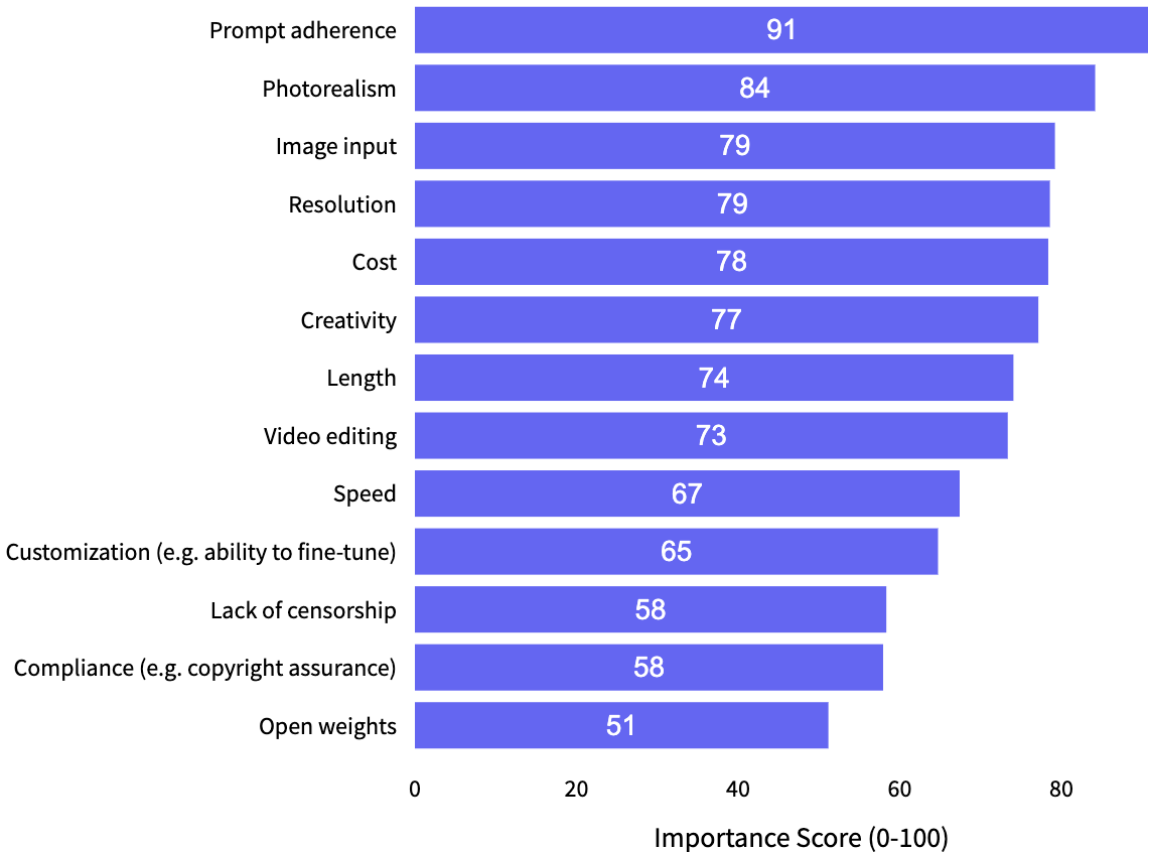
## Demand for Video Generation Models

Which models are you using for video generation? N=161



## Key Factors for Selecting Video Generation Models

How important are the following criteria when selecting video generation models<sup>1</sup>? N=161



1. Respondents were asked to choose if each criteria was Critically Important, Considered but not a priority or Not considered. Each of the three options are assigned 100, 50 and 0 points respectively



04

## Inference Services

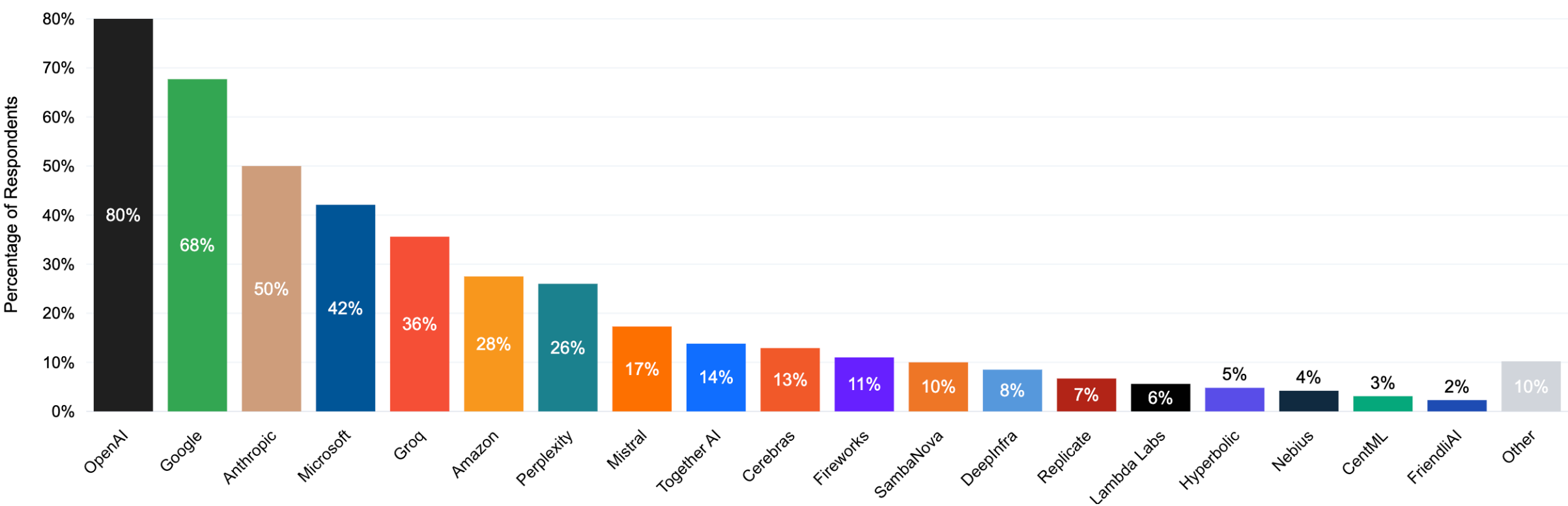
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AI Adoption Survey – H1 2025

# Inference: First-party APIs from proprietary model labs and hyperscalers lead in inference services with a long tail of third-party inference providers

## Demand for Inference Providers

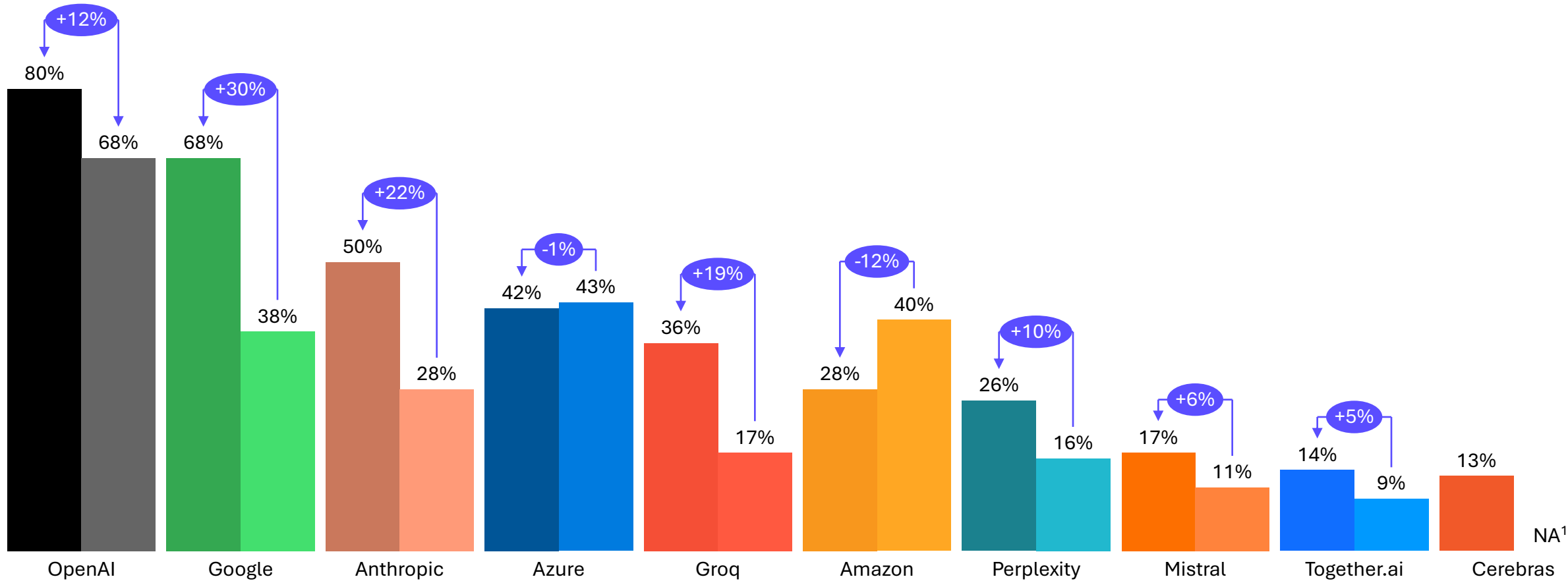
Which inference providers are you using or considering to access models? N=480



**Inference:** Providers with frontier first-party model APIs (e.g. OpenAI, Google & Anthropic) and chip challengers (e.g. Groq & Cerebras) gained share; Amazon and Azure's share fell

Demand for Top 10 Inference Services in May 2025

Which inference providers are you using or considering using to access models?, N=256 (2024) and N=480 (2025)



1. Respondents were not asked explicitly on their usage for Cerebras inference services





05

## Training & Hardware

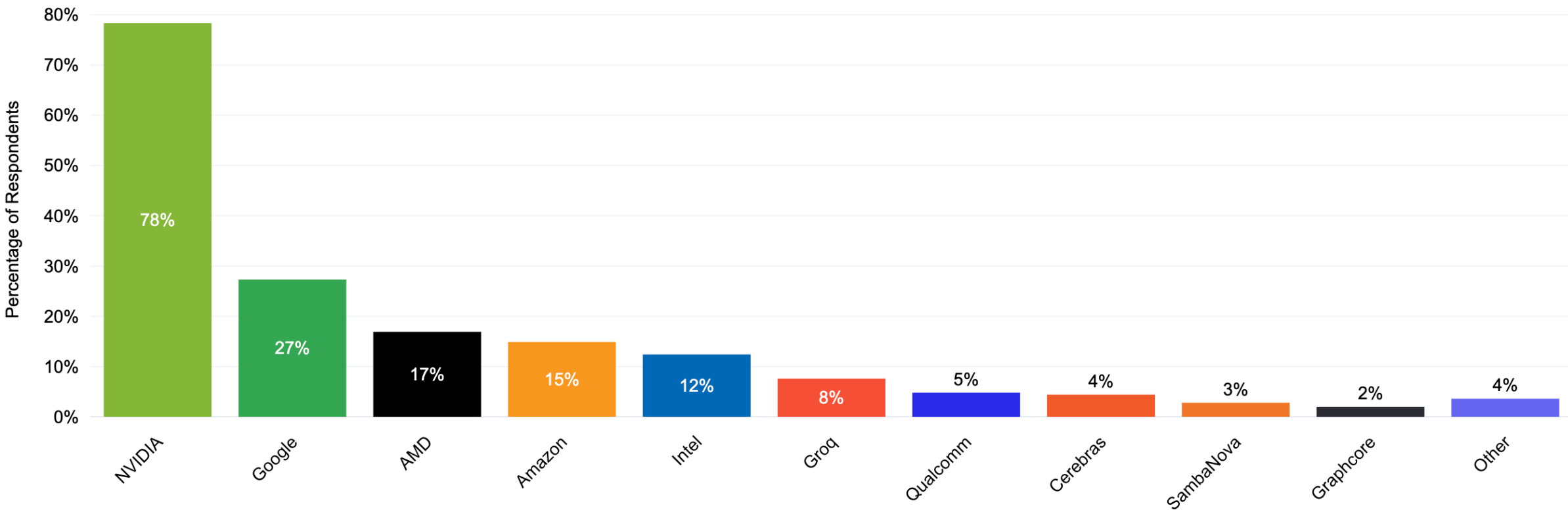
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AI Adoption Survey – H1 2025

**Training:** NVIDIA dominates the accelerator market for AI training, used by ~78% of respondents while the next most cited accelerators from Google (27%) and AMD (17%) lag well behind

**Demand for Accelerators for Training AI Models**

*Which company's accelerators are you using for training models? N=249*





# Artificial Analysis

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