ICONIQ

June 2025

The Builder's Playbook

2025 State of AI Report

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"ICONIQ delivered the best reference check I've ever seen, overnight."

Mati Staniszewski
Co-founder and CEO

Eleven Labs

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Go-to-Market Strategy

GTM Advisory →

"The customer introductions have been incredibly valuable. ICONIQ's relationships are truly deeper."

Bret Taylor
Co-founder

SIERRA

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Portfolio Operations →

Category Leadership

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"The success of our C-suite today is a testament to ICONIQ's strategic approach and dedication."

May Habib
Co-founder and CEO

WRITER

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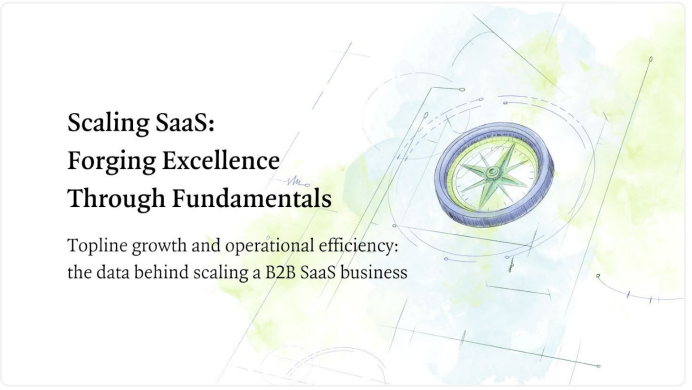

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Explore our research on best-in-class SaaS growth and efficiency

[The ICONIQ Enterprise Five]
Key performance indicators of Enterprise SaaS companies

[The SaaS Glossary]
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Introduction

We believe that building and operationalizing AI products is the **new frontier of competitive advantage** – and that the voices of the architects, engineers, and product leaders driving this work deserve their own spotlight. While last year's State of AI report centered on the buying journey and enterprise adoption dynamics, our 2025 report pivots squarely to the **"how-to": what it takes to conceive, deliver, and scale AI-powered offerings end-to-end**.

This year's report unpacks core dimensions of the builder's playbook:

1. **Product Roadmap & Architecture**: The emerging best practices for balancing experimentation, speed to market, and performance at each stage of model evolution
2. **Go-to-Market Strategy**: How teams are aligning pricing models and go-to-market strategies to reflect AI's unique value drivers
3. **People & Talent**: Building the right team to harness AI expertise, foster cross-functional collaboration, and sustain long-term innovation
4. **Cost Management & ROI**: Strategies and benchmarks for spend associated with building and launching AI products
5. **Internal Productivity & Operations**: How companies are embedding AI into everyday workflows and the biggest drivers of productivity unlock

Drawing on our proprietary survey results alongside in-depth interviews with AI leaders across the ICONIQ community, the 2025 State of AI report offers a blueprint for anyone tasked with turning generative intelligence from a promising concept into a dependable, revenue-driving asset.

Explore Our AI Perspectives

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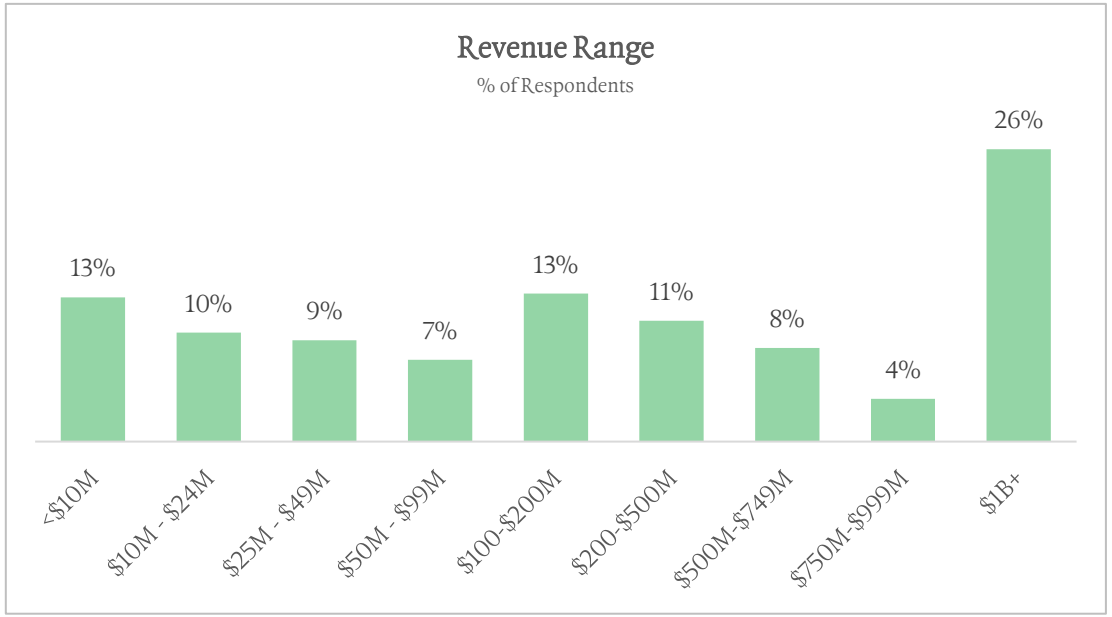
Data Sources & Methodology

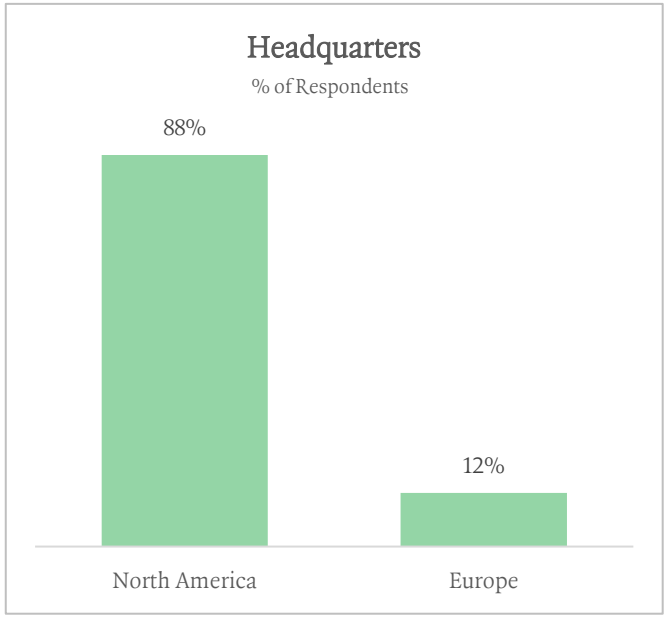
This study summarizes data from an April 2025 survey of 300 executives at software companies building AI products, including CEOs, Heads of Engineering, Heads of AI, and Heads of Product.

Throughout this report, we also weave in perspectives, insights, and what we believe to be best practices from AI leaders from the ICONIQ community.

All industry perspectives shared in this report have been anonymized to protect company-level information.

Respondent Firmographics

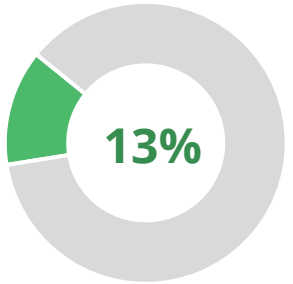


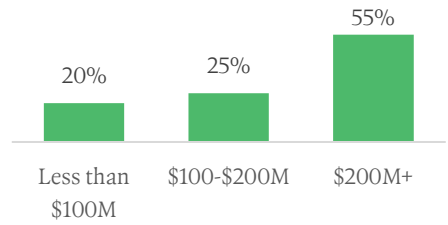


In this report, select companies are referred to as "high growth companies" because they meet the following criteria

- **AI Product Traction**: AI product is in General Availability or Scaling
- **Revenue**: At least $10M in annual revenue
- **Topline Growth**: 100%+ YoY revenue growth if <$25M Revenue, 50%+ YoY revenue growth if $25M-250M Revenue, 30%+ YoY revenue growth if $250M+ Revenue

High Growth Companies
% of respondents





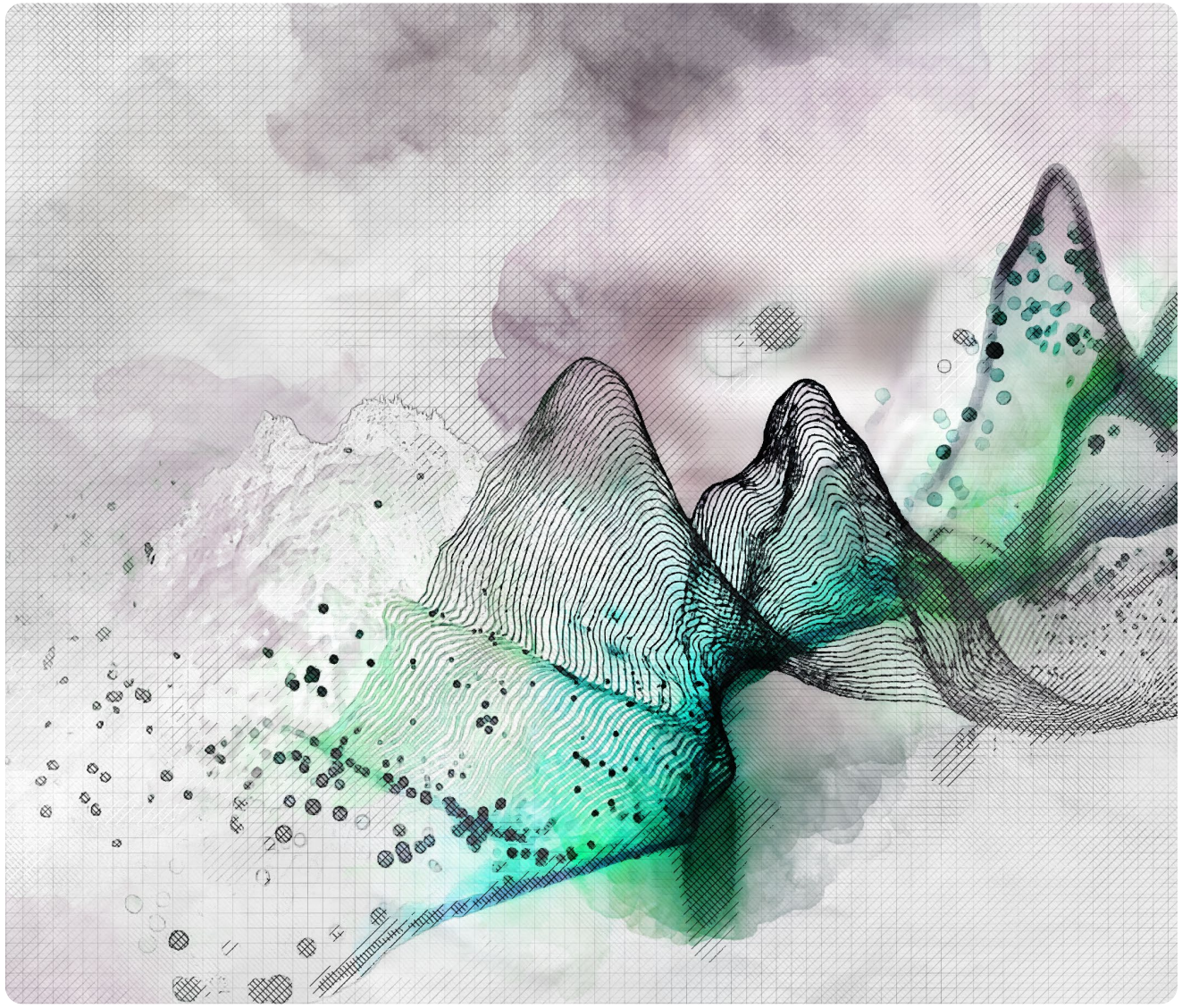
Notes: (1) This data was collected anonymously by an external survey. Survey responses include some but not all ICONIQ Venture and Growth portfolio companies as well as companies not part of ICONIQ Venture and Growth's portfolio.
(2) Certain questions in the survey were optional. Accordingly, some N-Size numbers in this presentation are less than 300

Most SaaS companies have evolved to add new AI capabilities and products; the following pages will dive into how AI-enabled and AI-native companies are approaching product development

Focus of this report

Notes: Representative Examples provided for illustrative purposes only. Trademarks are the property of their respective owners. None of the companies illustrated have endorsed or recommended the services of ICONIQ.
Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

Building GenAI Products



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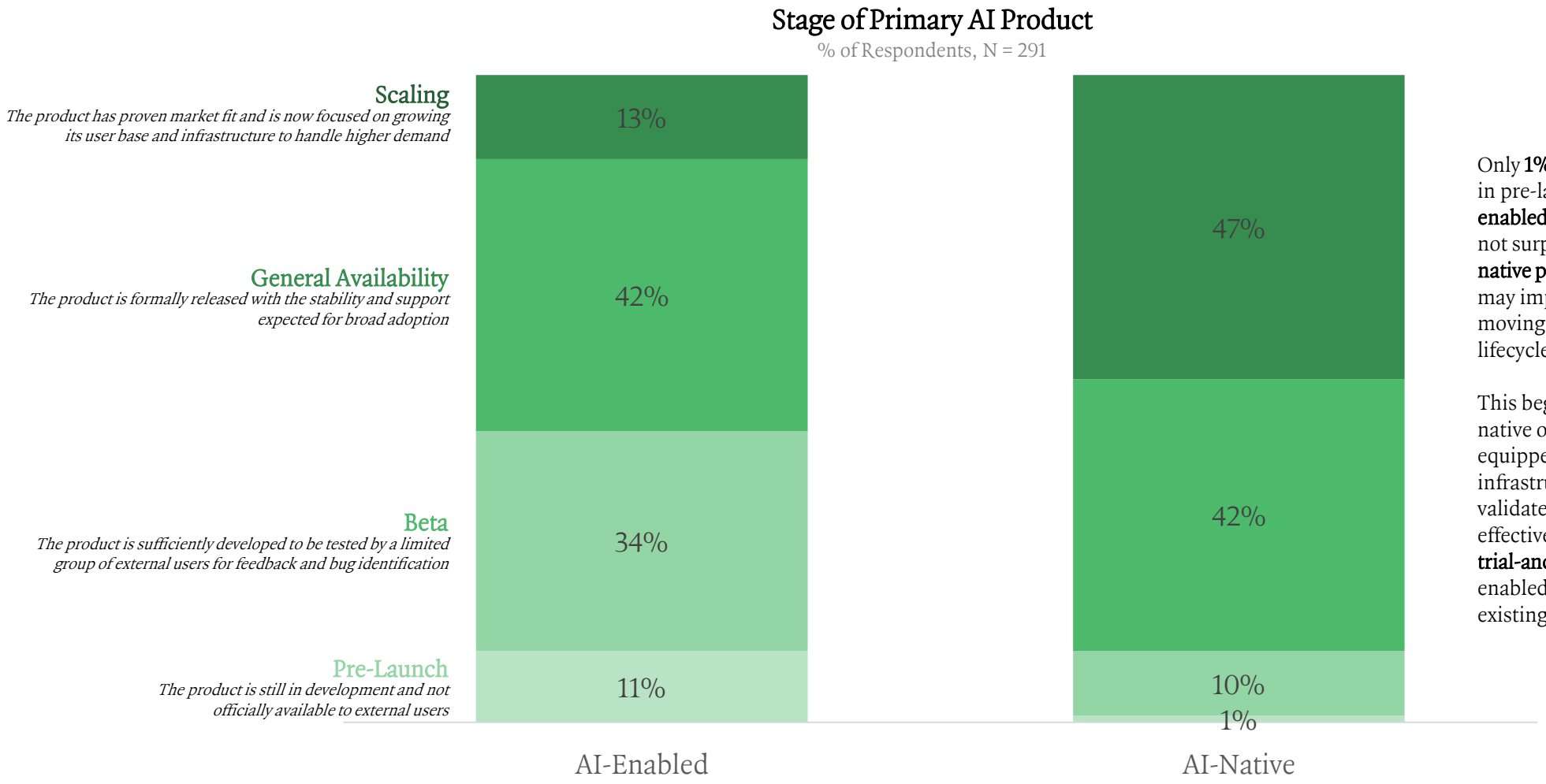
Stage of Primary AI Product

AI-native companies are further along in the development cycle compared to AI-enabled peers, with around 47% of products analyzed having reached critical scale and proven market fit

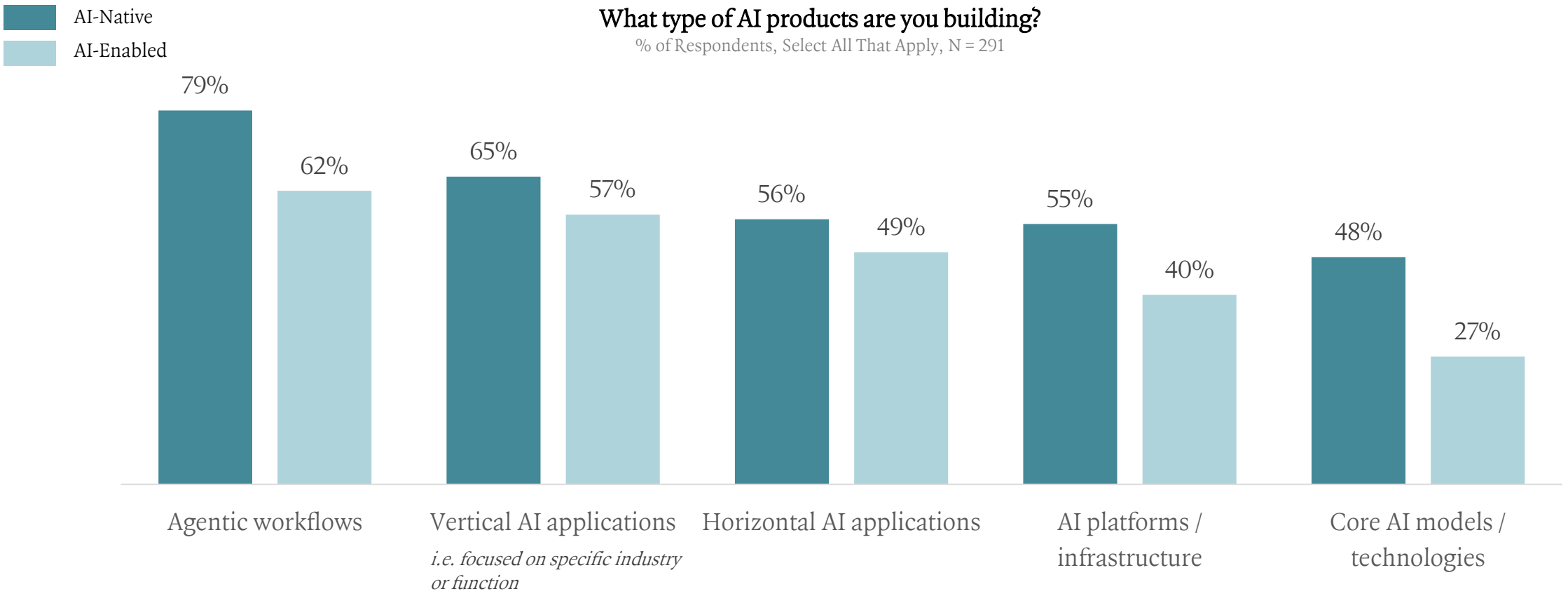


Only **1% of AI-native companies** are still in pre-launch, compared to **11% of AI-enabled companies**. Meanwhile, while not surprising to see that **47% of AI-native products are already scaling**, this may imply AI-native companies are moving faster *through* the product lifecycle and achieving traction earlier.

This begs the question whether AI-native orgs may be structurally better equipped - through team composition, infrastructure, or funding models - to validate product-market fit and scale effectively, and perhaps **leapfrogging the trial-and-error phases** that slow down AI-enabled companies retrofitting AI into existing workflows.

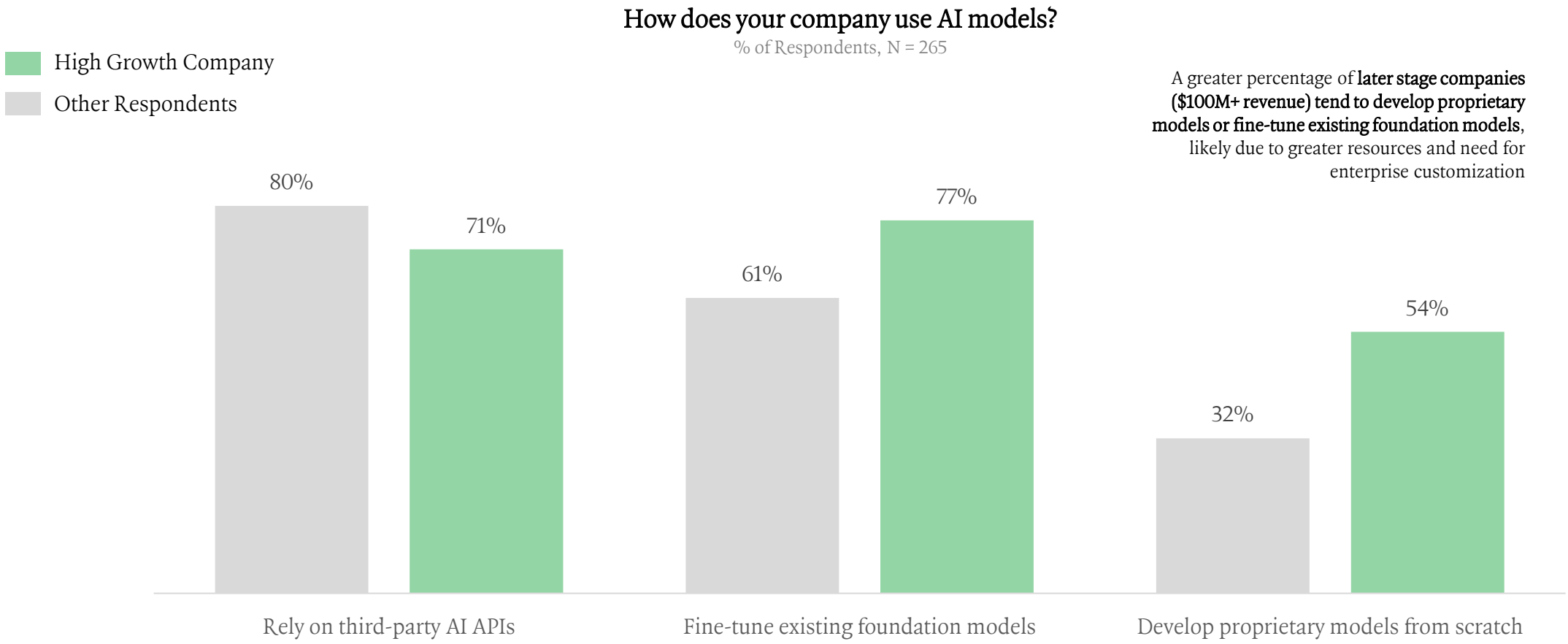
Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

Agentic workflows and the application layer are the most common types of products being built across AI-native and AI-enabled companies; notably, around 80% of AI-native companies are currently building agentic workflows



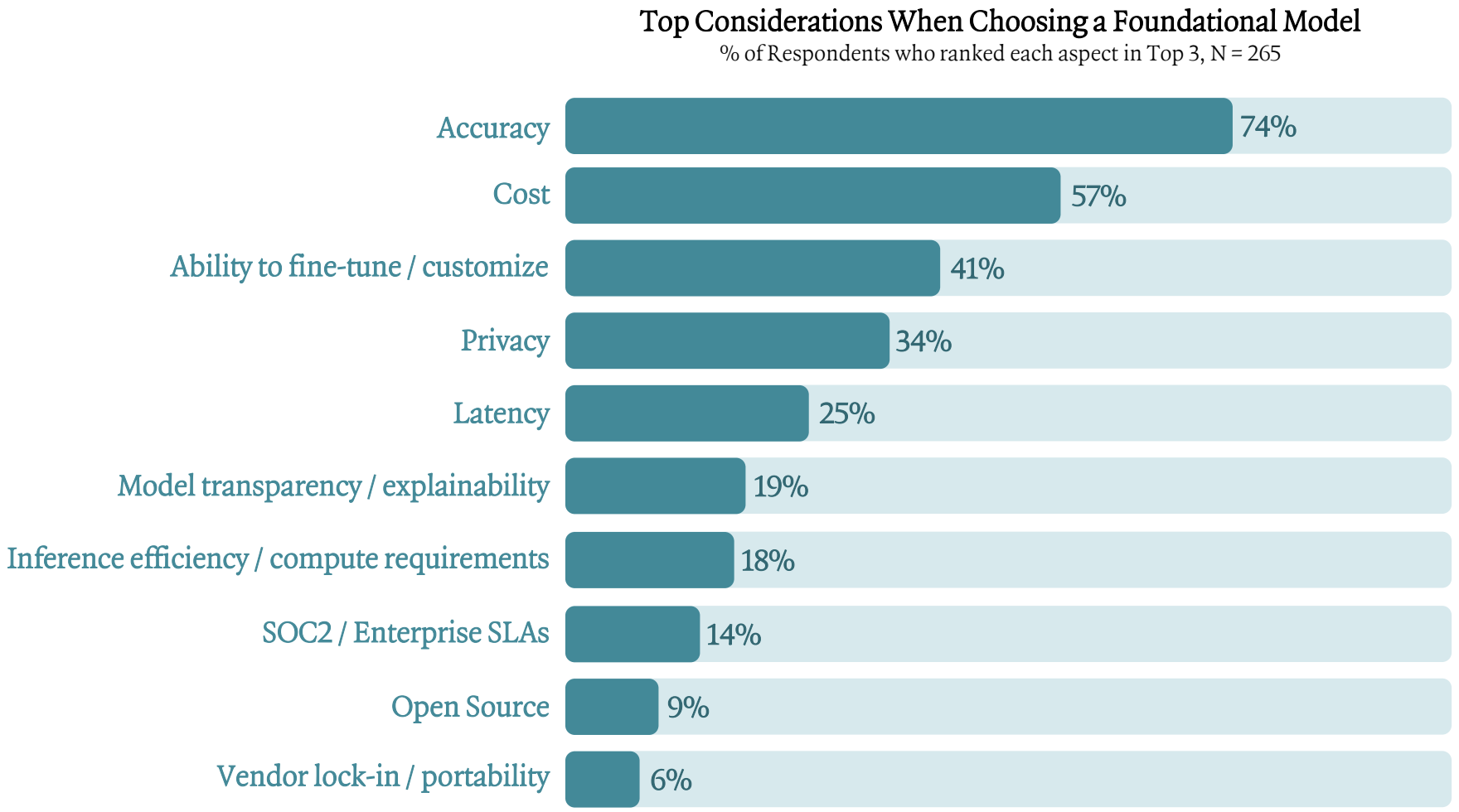
Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

Most companies building AI applications are relying on third-party AI APIs; however, a larger proportion of high-growth companies are also finetuning existing foundation models and developing proprietary models from scratch



Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

When choosing foundational models for customer-facing use cases, companies prioritize model accuracy above all other factors

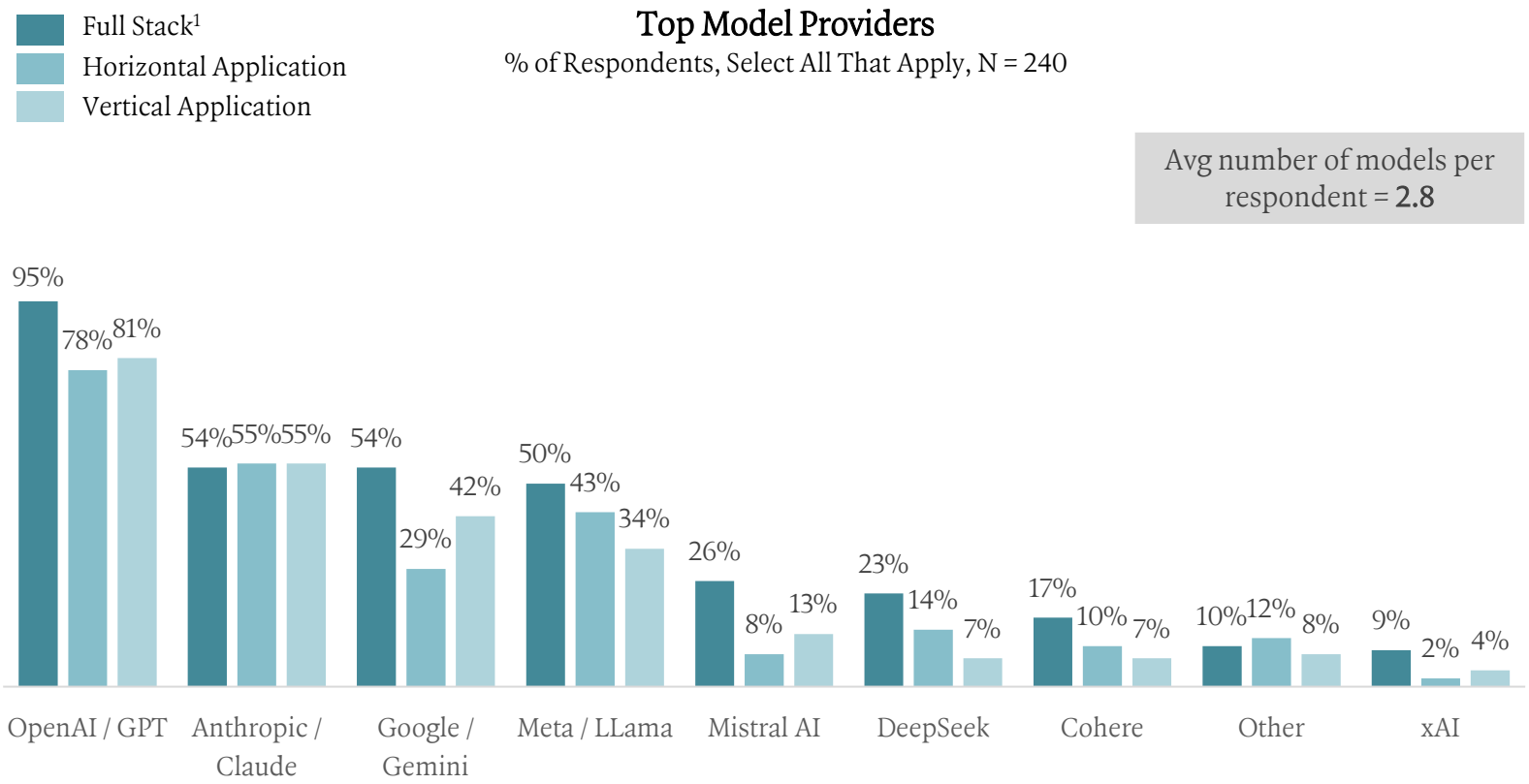


In last year's State of AI report, **cost ranked as the lowest key purchasing consideration** in comparison to other factors like performance, security, customizability, and control. Notably, cost is **much higher in this year's data perhaps echoing the commoditization of the model layer with the rise of more cost-efficient models like DeepSeek.**

Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

Top Model Providers

OpenAI's GPT models continue to be the most popular model; however, many companies are increasingly adopting a multi-model approach to AI products across use cases



Companies are increasingly adopting a **multi-model approach to AI products**, leveraging different providers and models based **on use case, performance, cost, and customer requirements**.

This flexibility enables them to optimize for diverse applications like cybersecurity, sales automation, and customer service while **ensuring compliance and superior user experience across regions**.

Architectures are being built to support quick model swaps, with some leaning toward open-source models for cost and inference speed advantages.

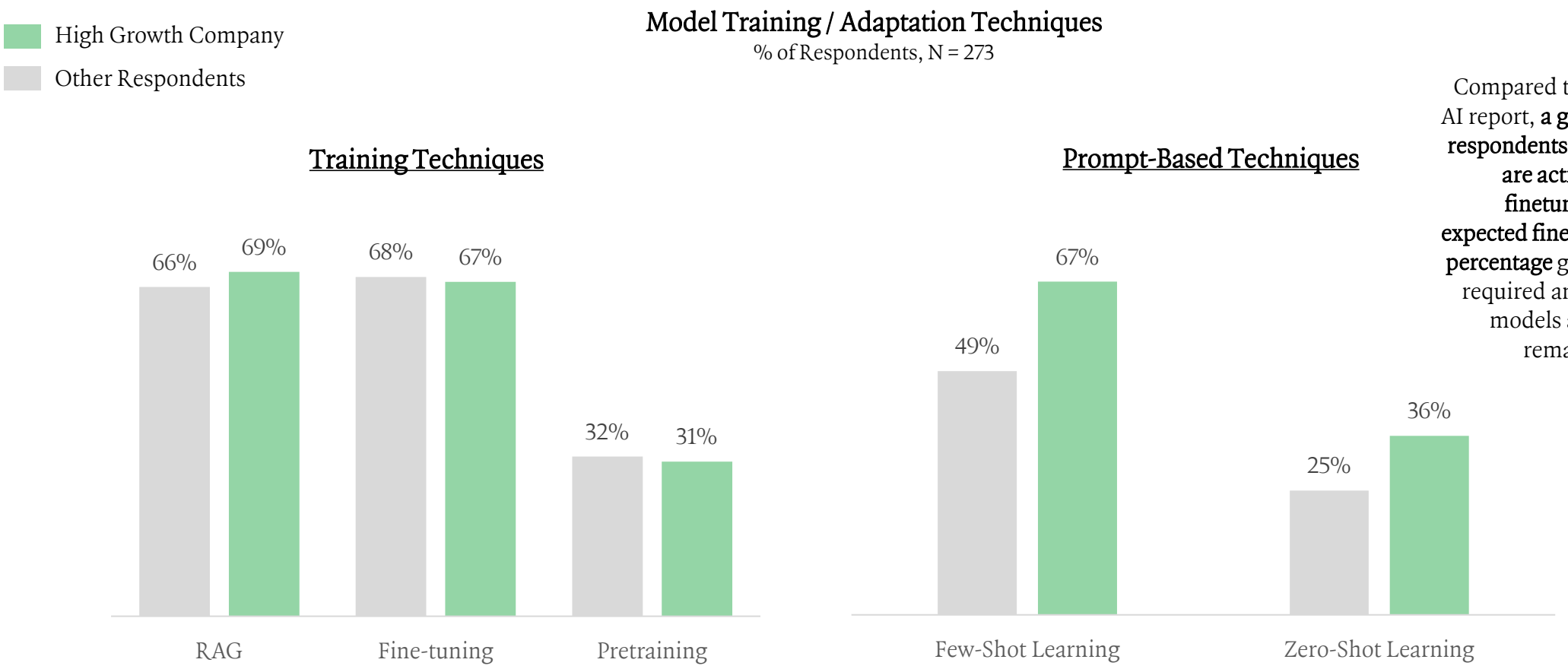
Generally, most respondents are using a combination of OpenAI models and 1-2 other models from the other providers.

> We use different proprietary and 3rd party models because our customers have diverse needs. **Specialized models allow us to better tailor the experiences for our customers** and their use case -- sales automation, agents for customer service and internal tools. In addition, we can **offer our customers more flexible price points and options**, as well as be constantly experimenting with new models and business opportunities.
>
> *VP Product, $1B+ Revenue, Full Stack AI Company*

Notes: (1) Companies building both end user applications and core AI models/technologies

Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

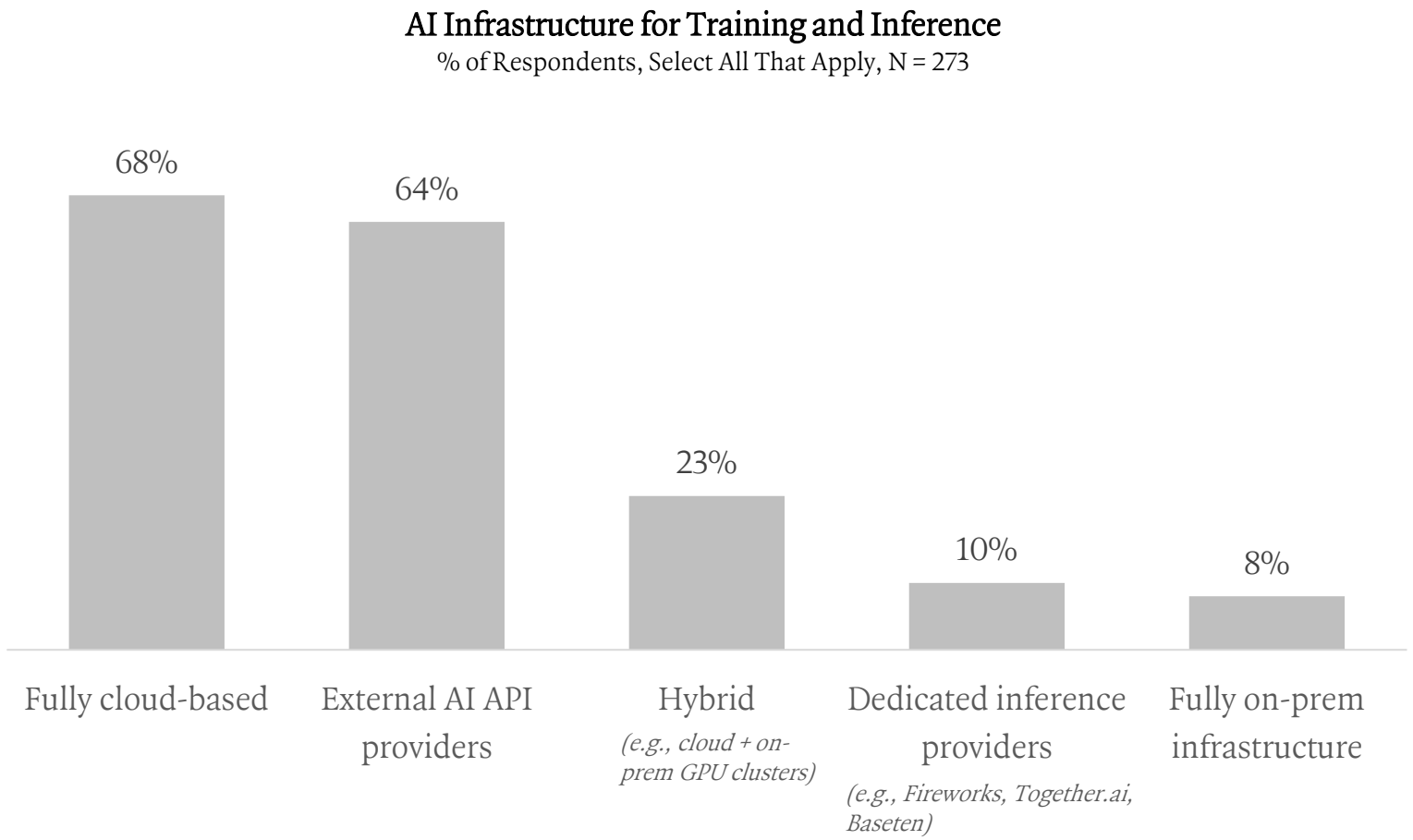
Retrieval augmented generation (RAG) and fine-tuning are the most common model training techniques; high-growth companies tend to use a greater variety of prompt-based techniques



Compared to last year's State of AI report, **a greater percentage of respondents in this year's survey are actively using RAG and finetuning techniques**. We **expected finetuning to be a lower percentage** given the investment required and how quickly base models are improving but it remains an area of focus

Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

Most companies are using cloud-based solutions and AI API providers for training and inference

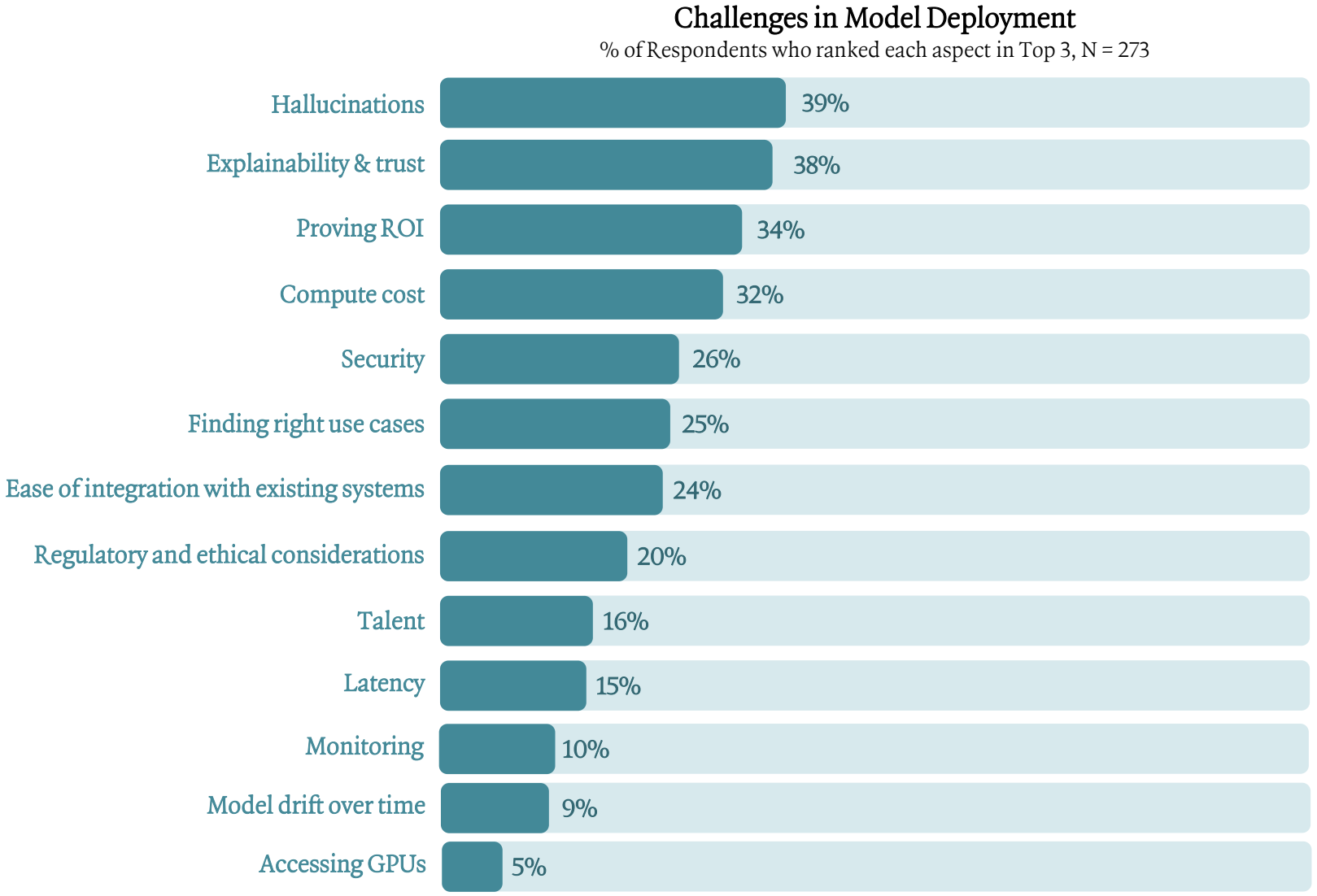


Most organizations are clearly leaning into **fully managed AI solutions -** 68% operate entirely in the cloud and 64% rely on external AI API providers - because this model **minimizes upfront capital outlay and operational complexity, while maximizing speed-to-market**. However, this reliance also means vendor selection, SLA negotiation, and cost-per-call management have become strategic priorities rather than just technical considerations.

Meanwhile, **only 23% of teams use a hybrid approach and fewer than 1 in 10 maintain on-prem or dedicated inference infrastructure**, underscoring that these models remain niche, adopted primarily in scenarios where control, compliance, or specialized performance justify the extra overhead. As real-time AI use cases grow, there's an **emerging opportunity for turnkey inference platforms to capture more share**, but any move away from fully managed services will hinge on a clear business case or regulatory imperative.

Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

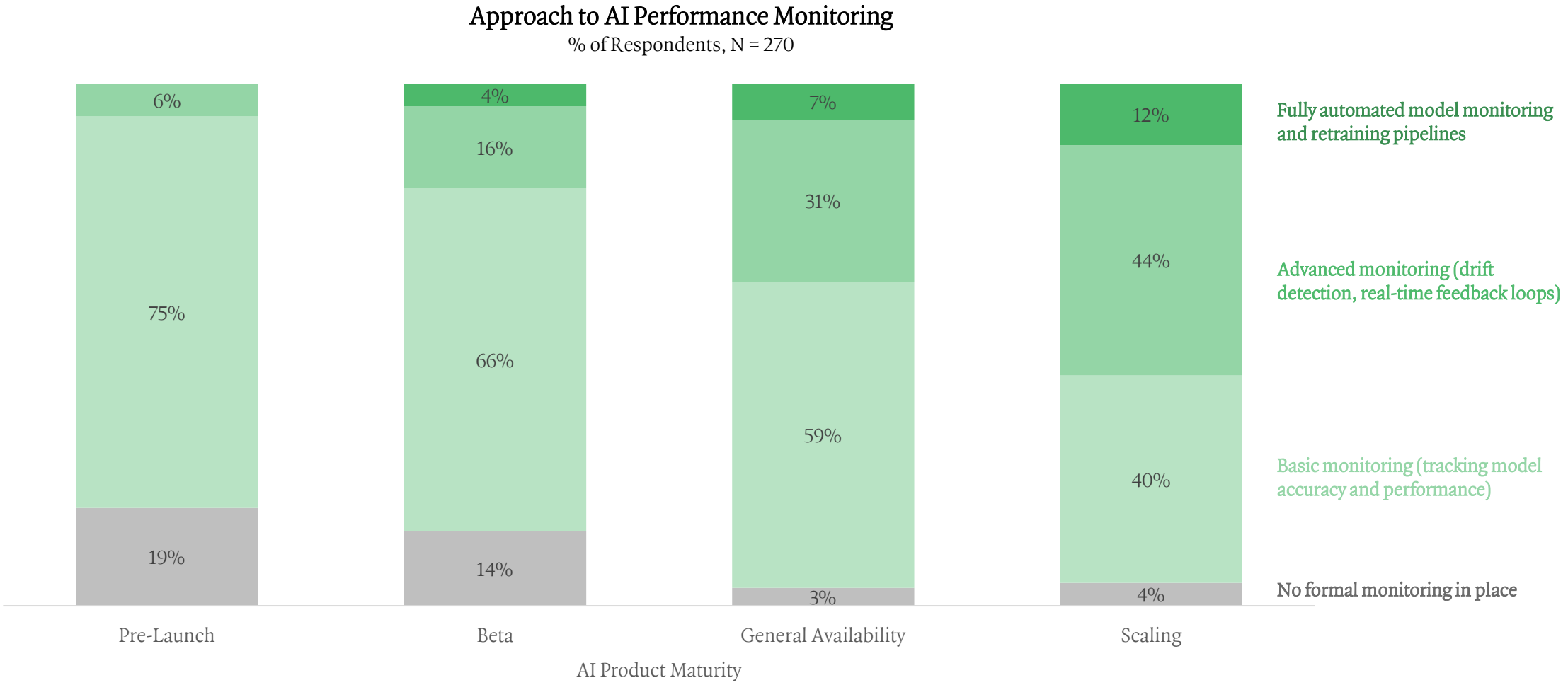
Top challenges noted by companies when deploying models include hallucinations, explainability / trust, and proving ROI



Explainability and trust ranked higher for companies building vertical AI applications, who may deal with additional compliance and legal restrictions in regulated industries like healthcare

Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

As AI products scale, performance monitoring becomes more important with many scaled AI products offering some kind of advanced performance monitoring



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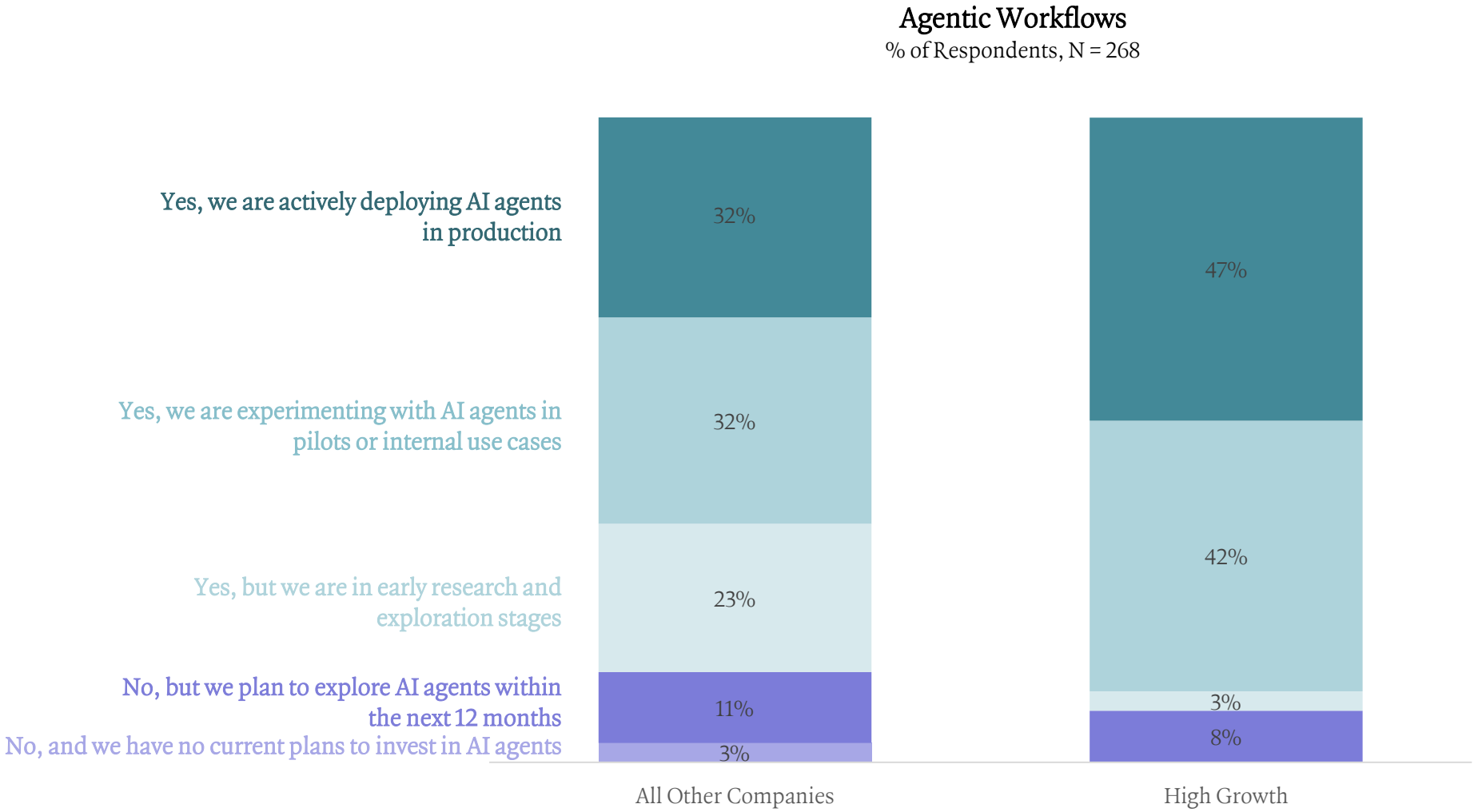
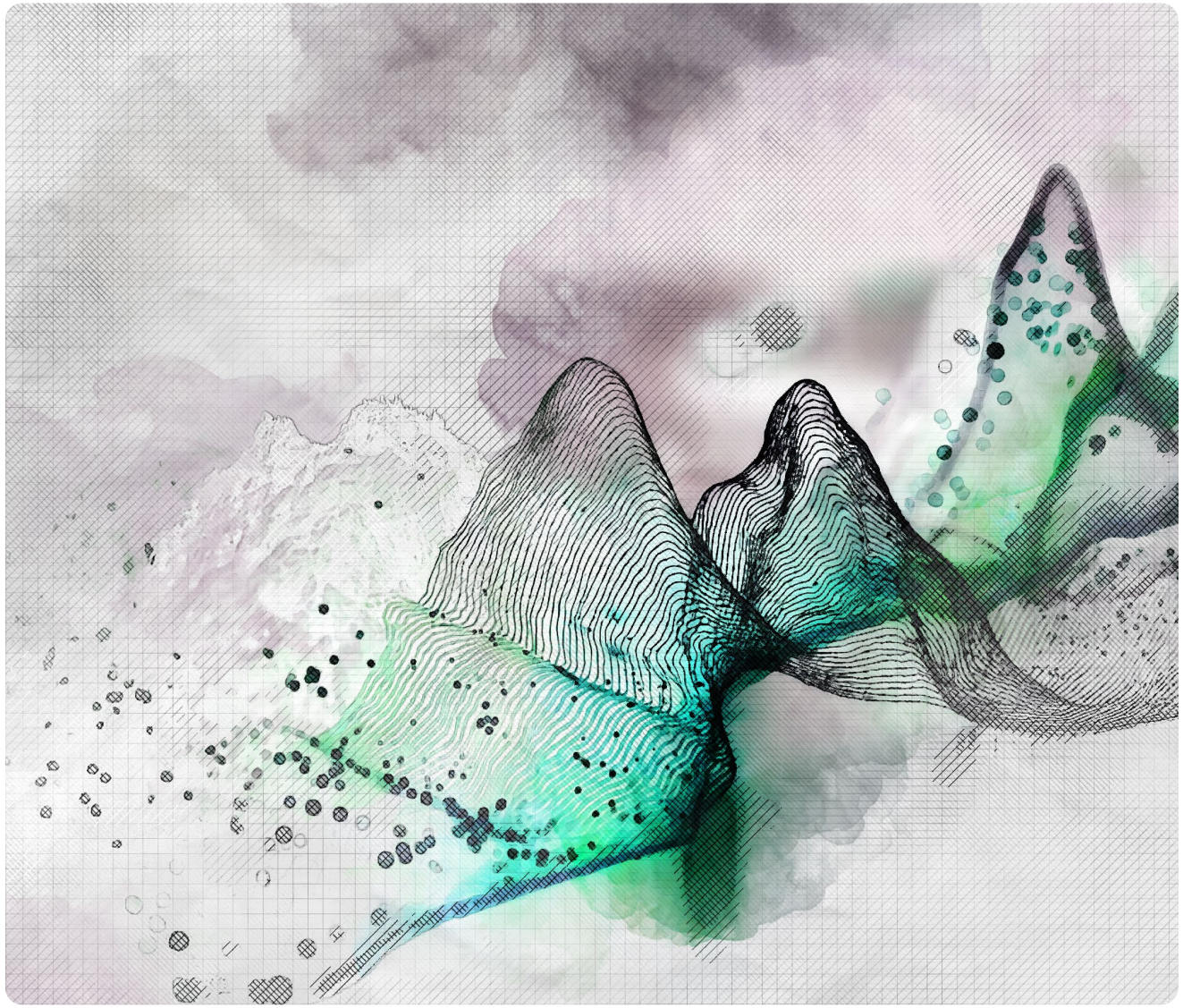
A significant number of companies are evaluating agentic workflows, with high growth AI companies more actively deploying AI agents in production



> Many of our users like the insights and analytics we are surfacing but are unwilling to commit the time to fully explore the information housed in the product. We are looking to build out AI agents that **effectively use the product for the end-users to surface worthwhile user-journeys** and bring the end-user along for them.
>
> *VP Product, $10-25M Revenue, Full Stack AI Company*

Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

Go-to-Market Strategy & Compliance



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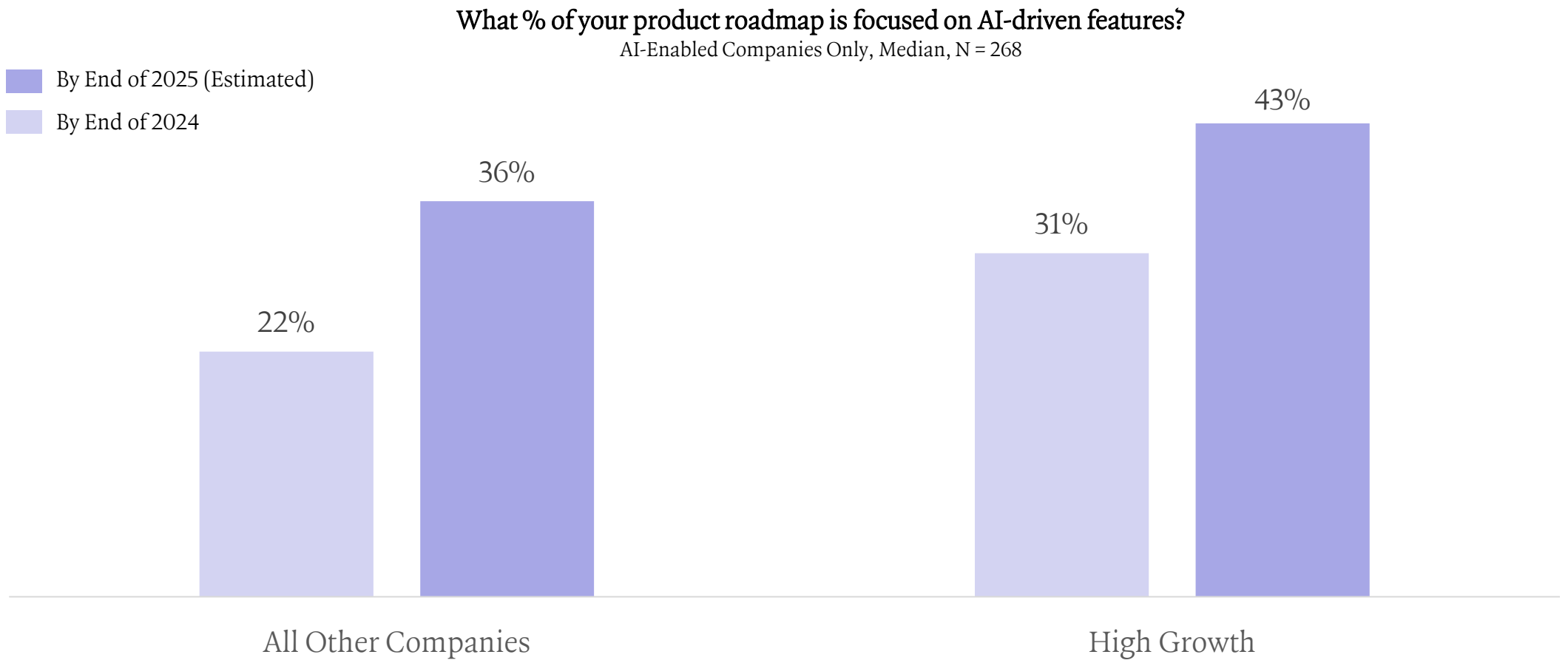
For AI-enabled companies, around 20-35% of their product roadmap has been focused on AI-driven features with high-growth companies dedicating closer to 30-45% of their roadmap to AI-driven features



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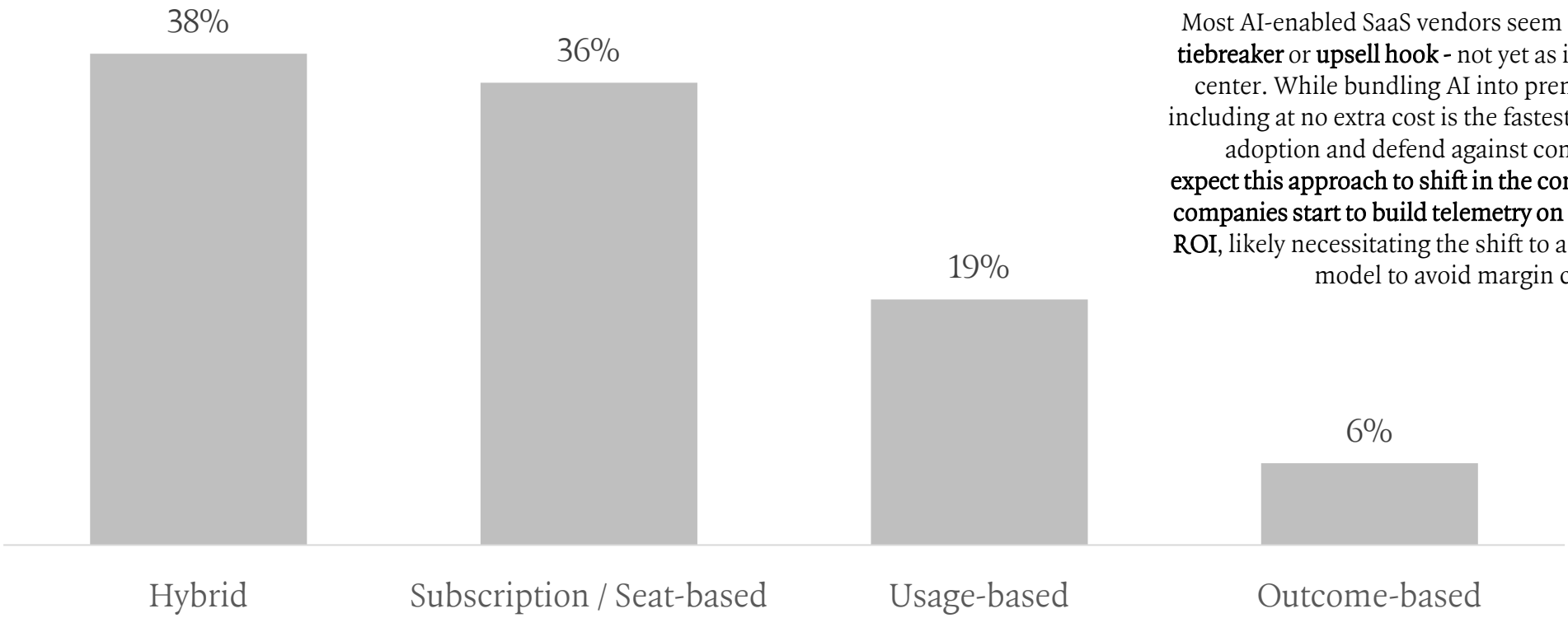
Many companies are using a hybrid pricing model which includes a combination of subscription / plan-based pricing along with either usage-based or outcome-based pricing

Primary Pricing Model (Including AI Products / Features and Software)

% of Respondents, N = 266



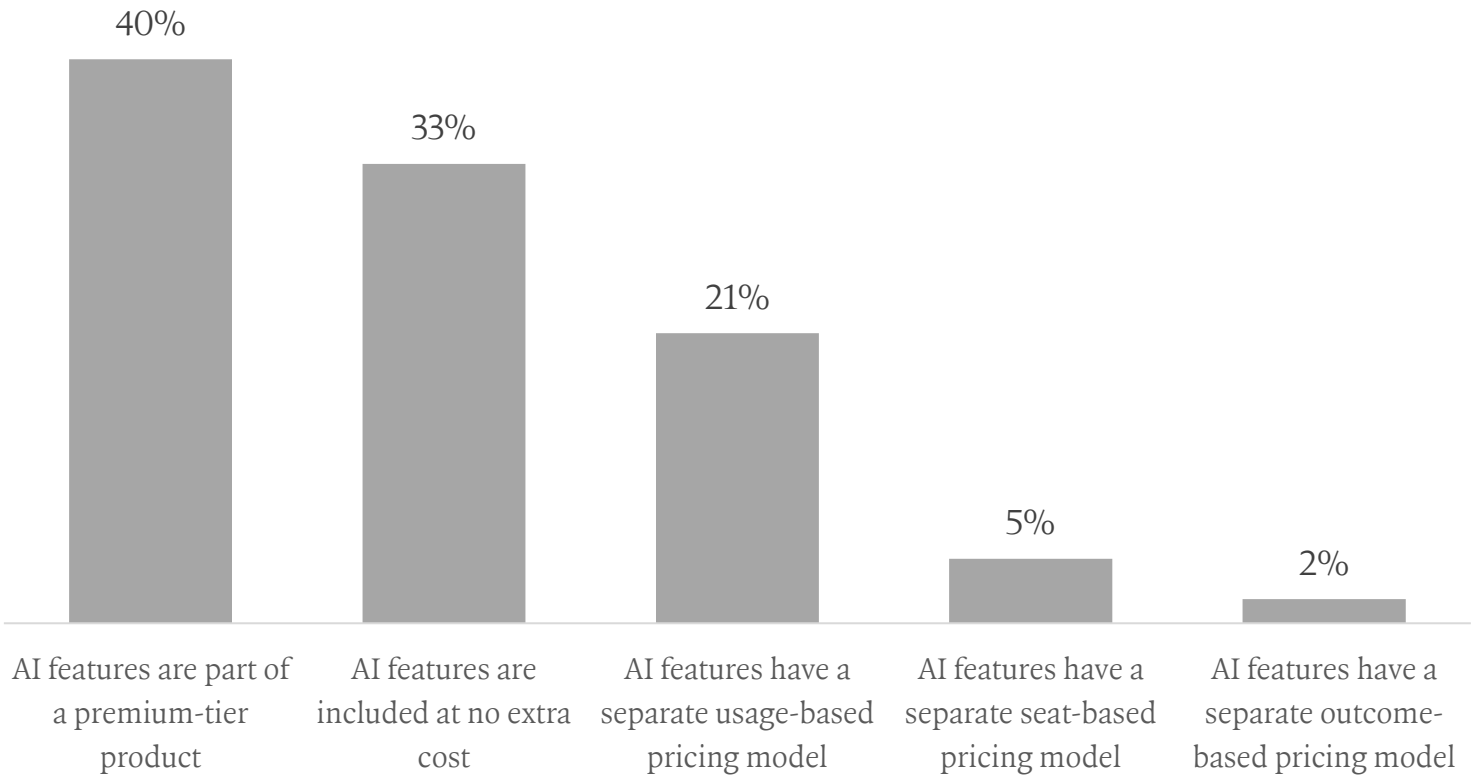
Most AI-enabled SaaS vendors seem to see AI as a **tiebreaker** or **upsell hook -** not yet as its own profit center. While bundling AI into premium tiers or including at no extra cost is the fastest way to drive adoption and defend against competitors, we **expect this approach to shift in the coming years as companies start to build telemetry on AI usage and ROI**, likely necessitating the shift to a usage-based model to avoid margin compression.

Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

Currently, most AI-enabled companies are either including AI features as part of a premium-tier product or including them at no extra cost

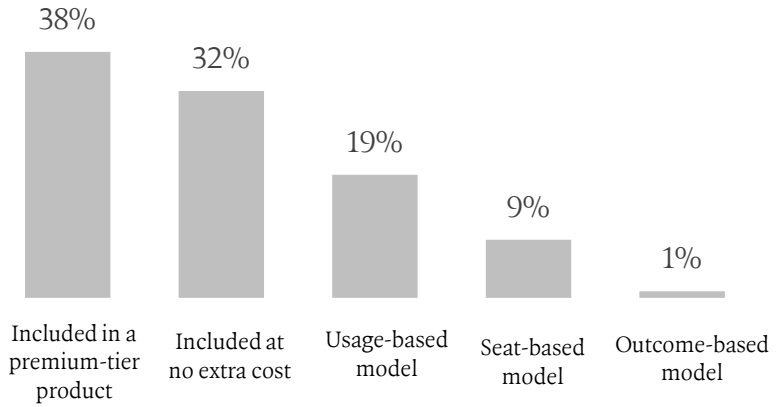
Primary Pricing Model for AI Features / Products

AI-Enabled Companies Only, % of Respondents, N = 174



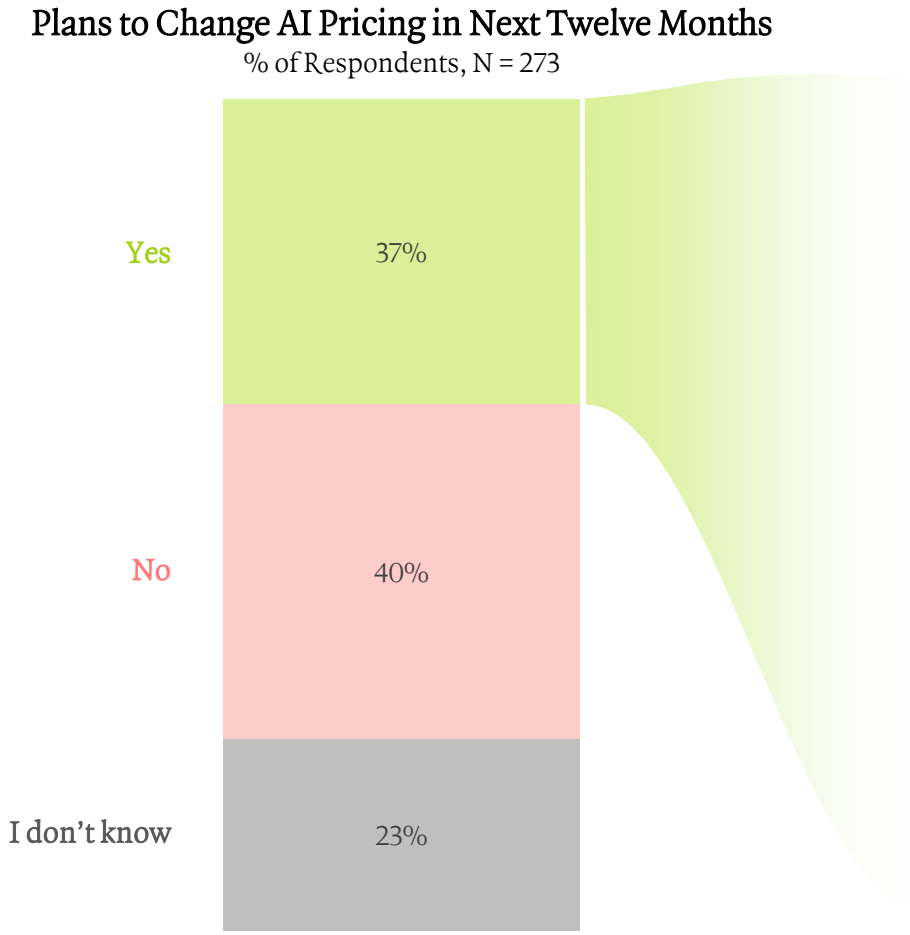
ICONIQ Cross-Functional Insight

In our 2025 State of GTM report, **we asked this same question to GTM leaders, and their responses largely aligned with R&D leaders** – further reinforcing the consistency of this trend across the market.



Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

40% of companies have no plans to change pricing, but 37% of respondents are exploring new pricing models based on consumption, ROI, and usage tiers



Factoring in ROI

"We would like to **integrate willingness to pay and clear connection to ROI** outcomes into our pricing model"
VP Product, $100-150M Revenue, Full Stack AI Company

"We are observing if AI capabilities deliver extra value to customer. Once we have critical adoption and proof of added value, we might **segment the current tiers of our platform** (i.e. create a top tier with the full AI /agents, a limit on the basic, and enterprise tiers)"
VP Product, $100-150M Revenue, Full Stack AI Company

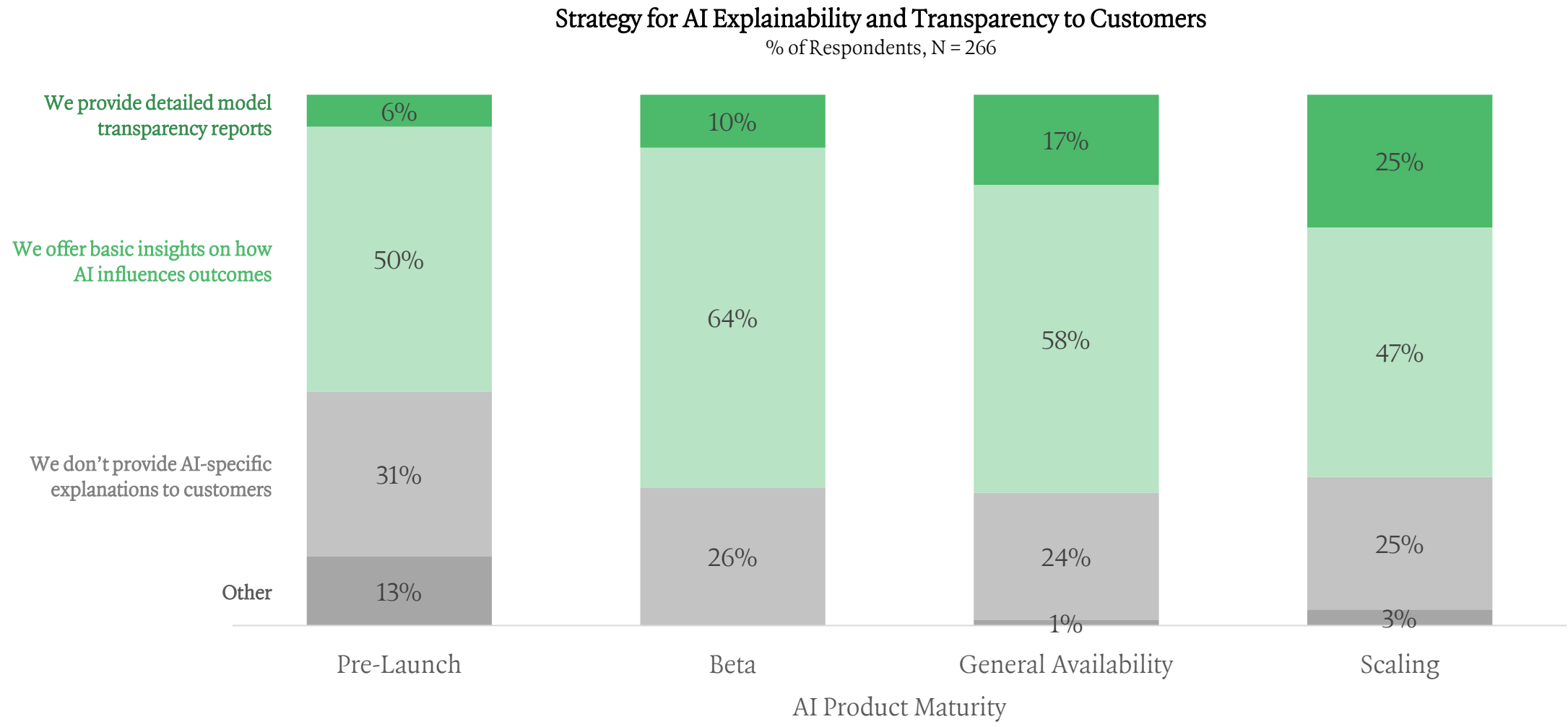
Consumption and Outcome-Based Pricing

"We will **complement premium tier model pricing with pricing models centered around consumption**. I expect we will also experiment with outcome-based pricing but it is unclear how we will structure pricing in such a way that it **allows customers to accurately budget for these costs**."
VP Product, $100-150M Revenue, Full Stack AI Company

"The subscription model is not working for us. **Power users tend to use a lot resulting in negative margins** considering LLM API costs, while **users who aren't using are at risk of churn**. Considering the high variable cost we are **planning to move to usage based** but bundle usage as a subscription e.g., 10M token per year package"
VP Product, $100-150M Revenue, Full Stack AI Company

Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

As AI products scale, providing detailed model transparency reports or basic insights on how AI influences outcomes becomes more critical

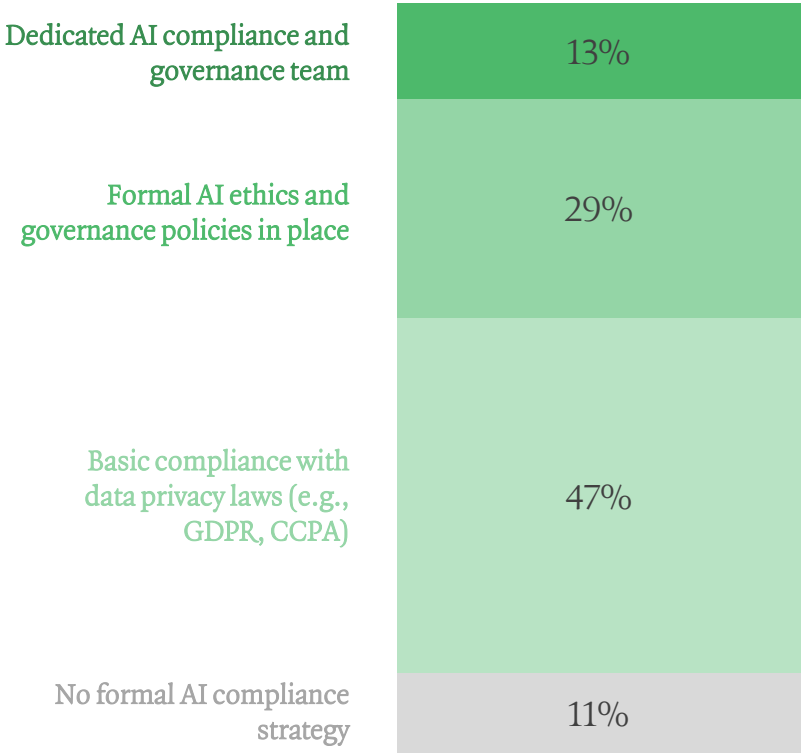


Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

Most companies have guardrails around AI ethics and governance policies, with the majority of respondents using human-in-the-loop oversight to ensure AI fairness and safety

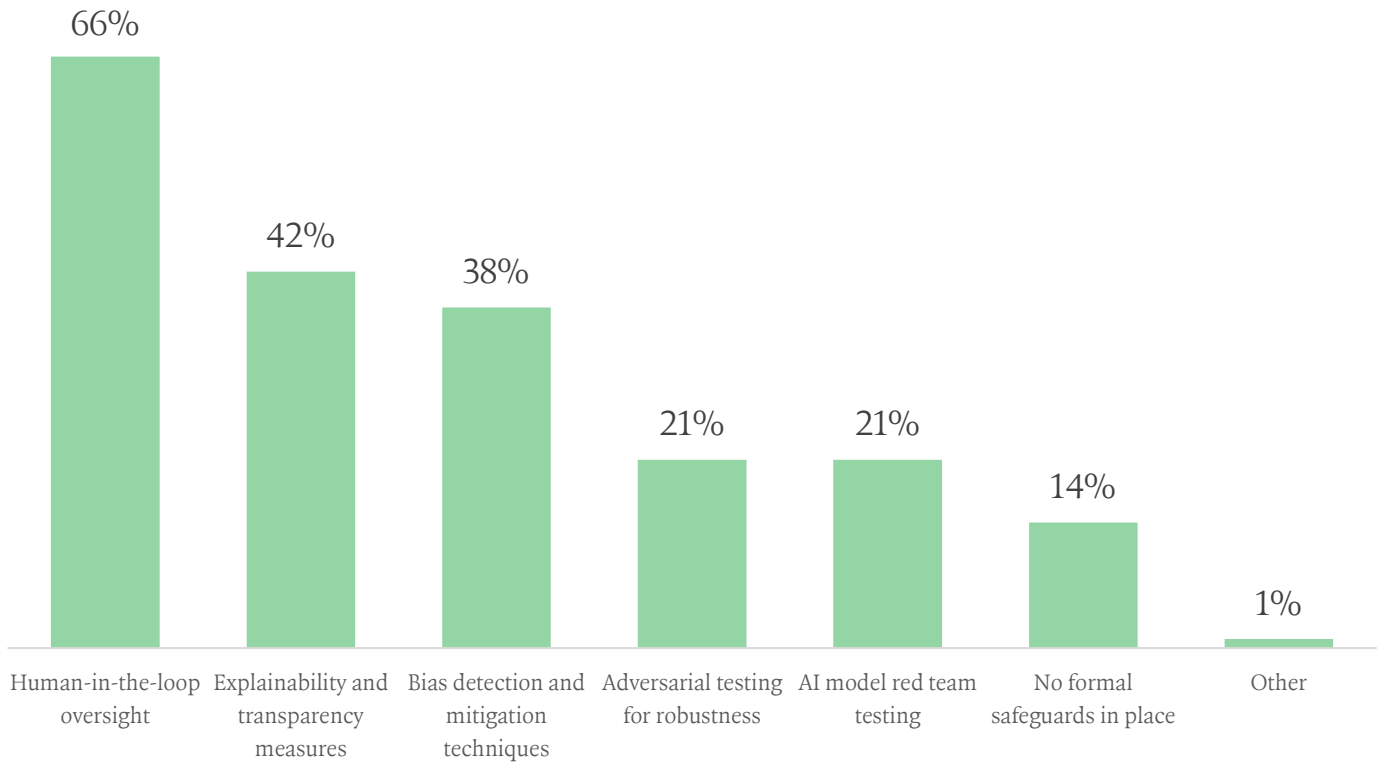
How does your company handle AI compliance and governance?

% of Respondents, N = 291



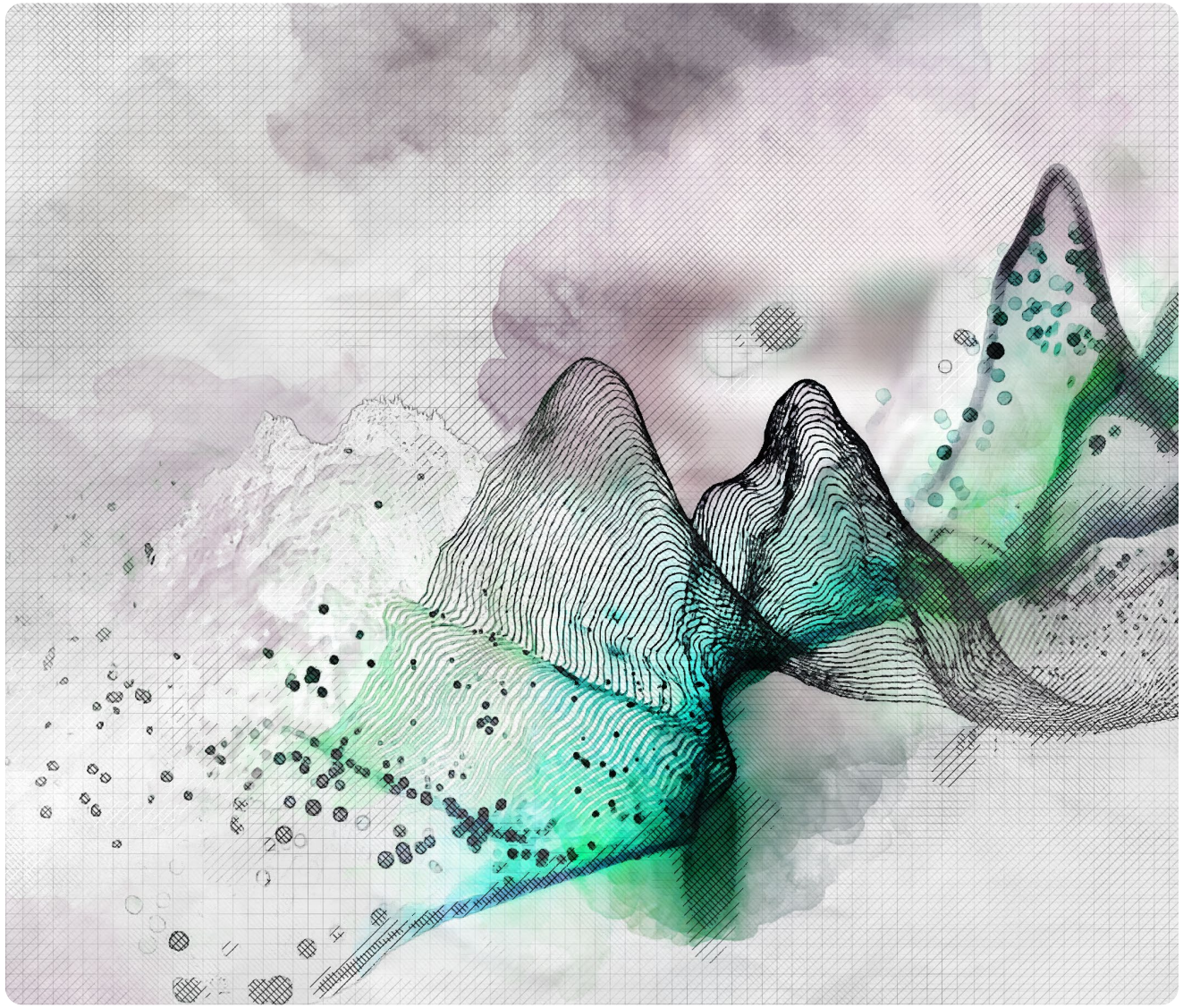
What safeguards does your company use to ensure AI fairness and safety?

% of Respondents, N = 291



Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

Organization Structure



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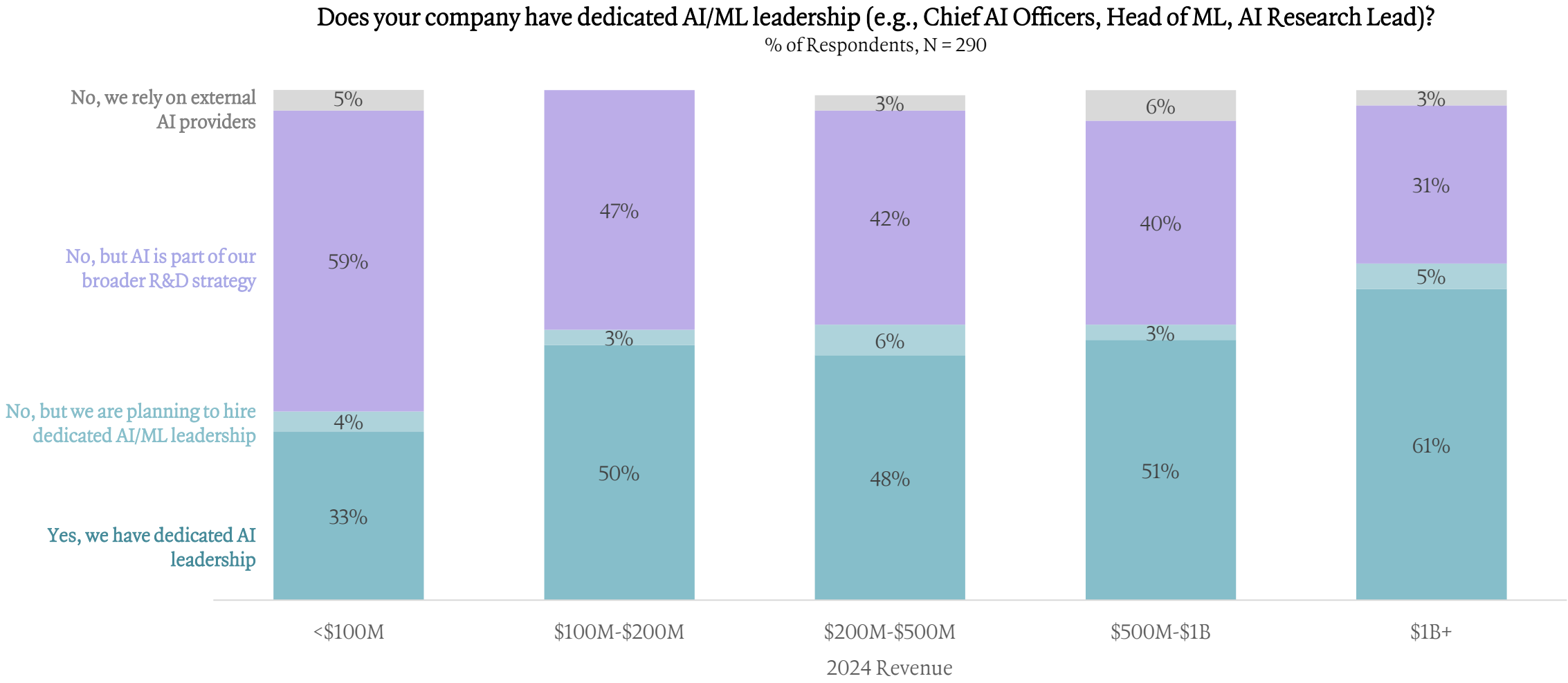
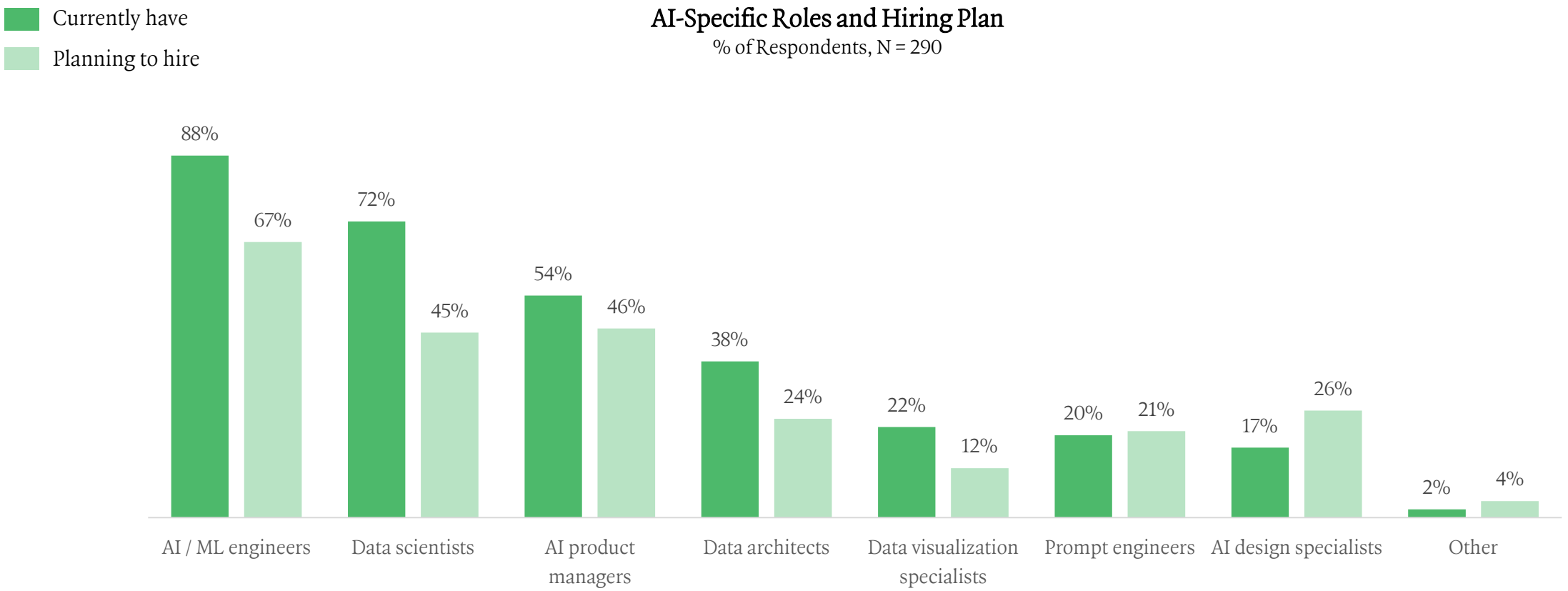
Many companies have dedicated AI leadership by the time they reach $100M in revenue likely due to increasing operational complexity and the need to have a centralized owner for AI strategy



Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

Most companies currently have dedicated AI/ML engineers, data scientists, and AI product managers, with AI/ML engineers taking the longest time on average to hire



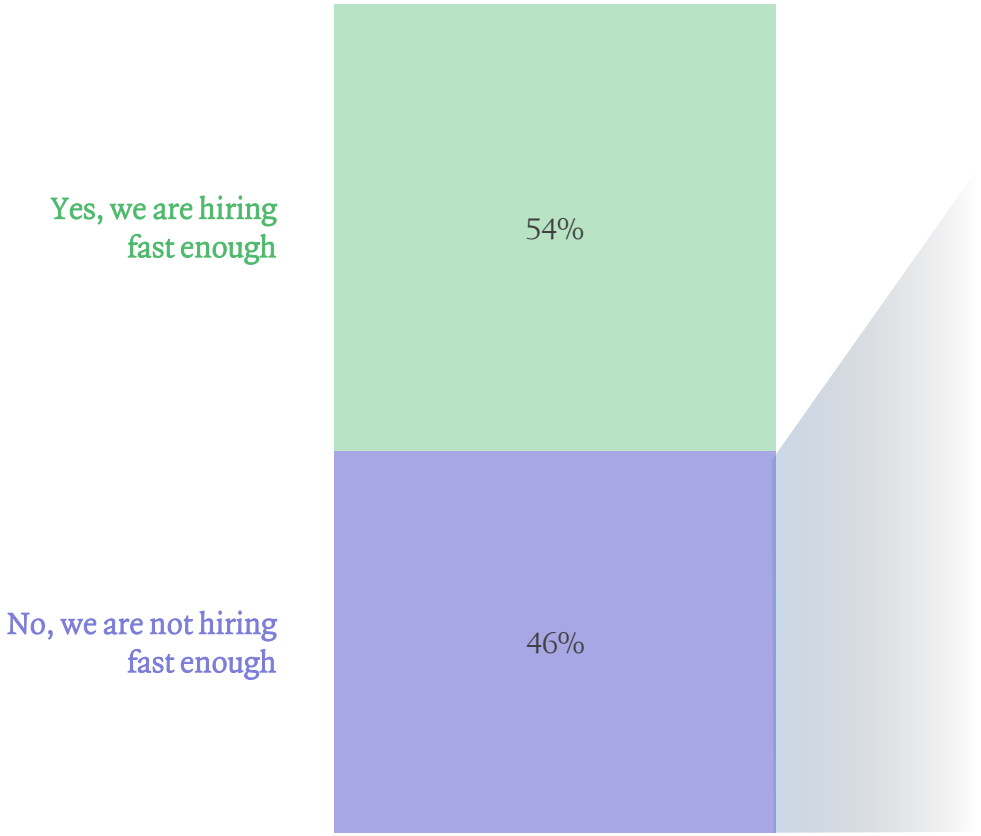
	AI / ML engineers	Data scientists	AI product managers	Data architects	Data visualization specialists	Prompt engineers	AI design specialists	Other
Avg Lead Time to Hire (# Days)	70	68	67	66	44	62	61	N/A

Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

Across respondents, there was a relatively even split in sentiment towards the pace of hiring, with those who felt like they were not hiring fast enough primarily citing lack of qualified candidates as the main constraint

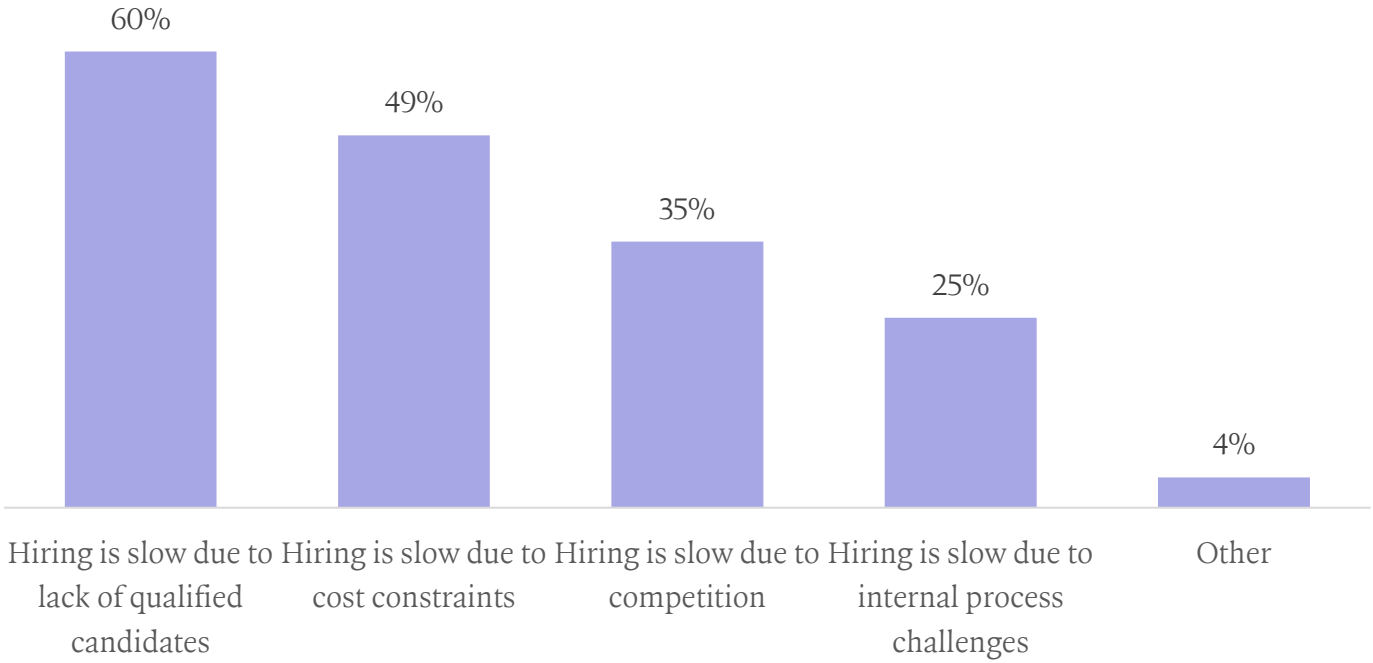
Pace of Hiring

% of Respondents, N = 291



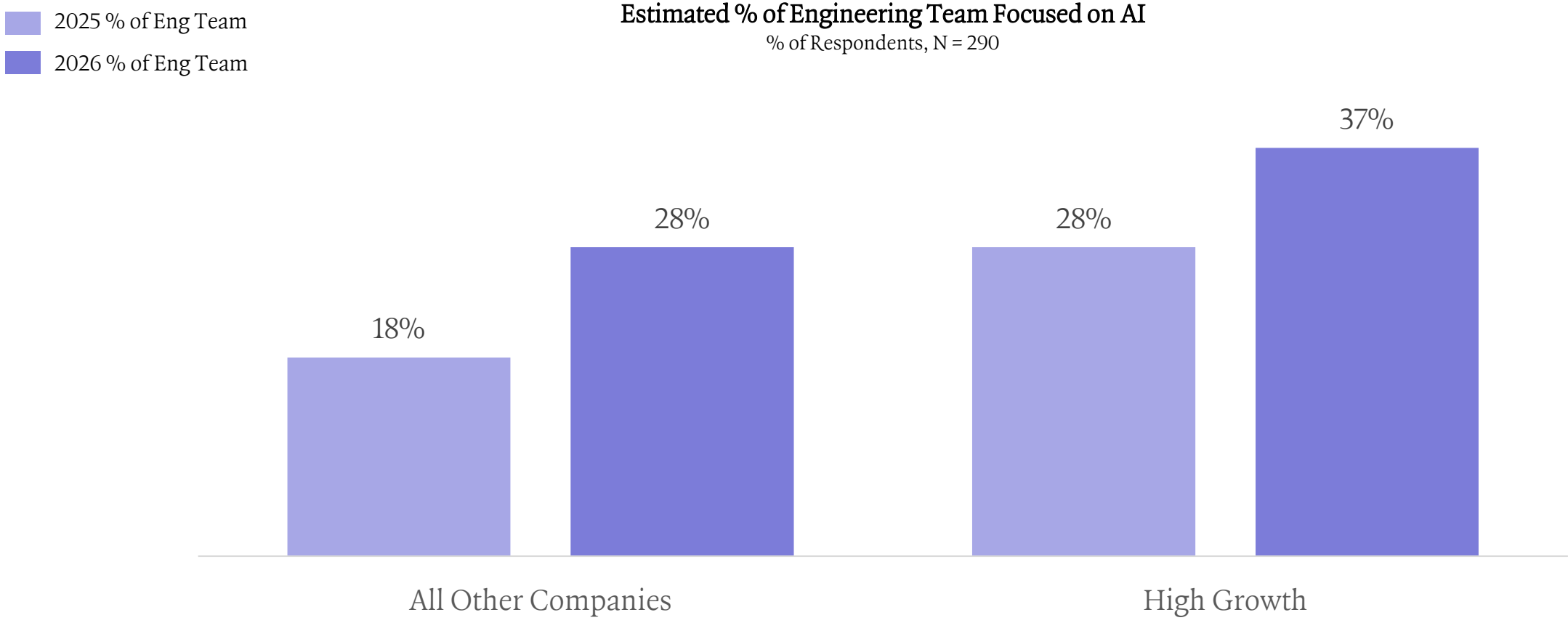
Reasons for Slow Hiring

% of Respondents, N = 134



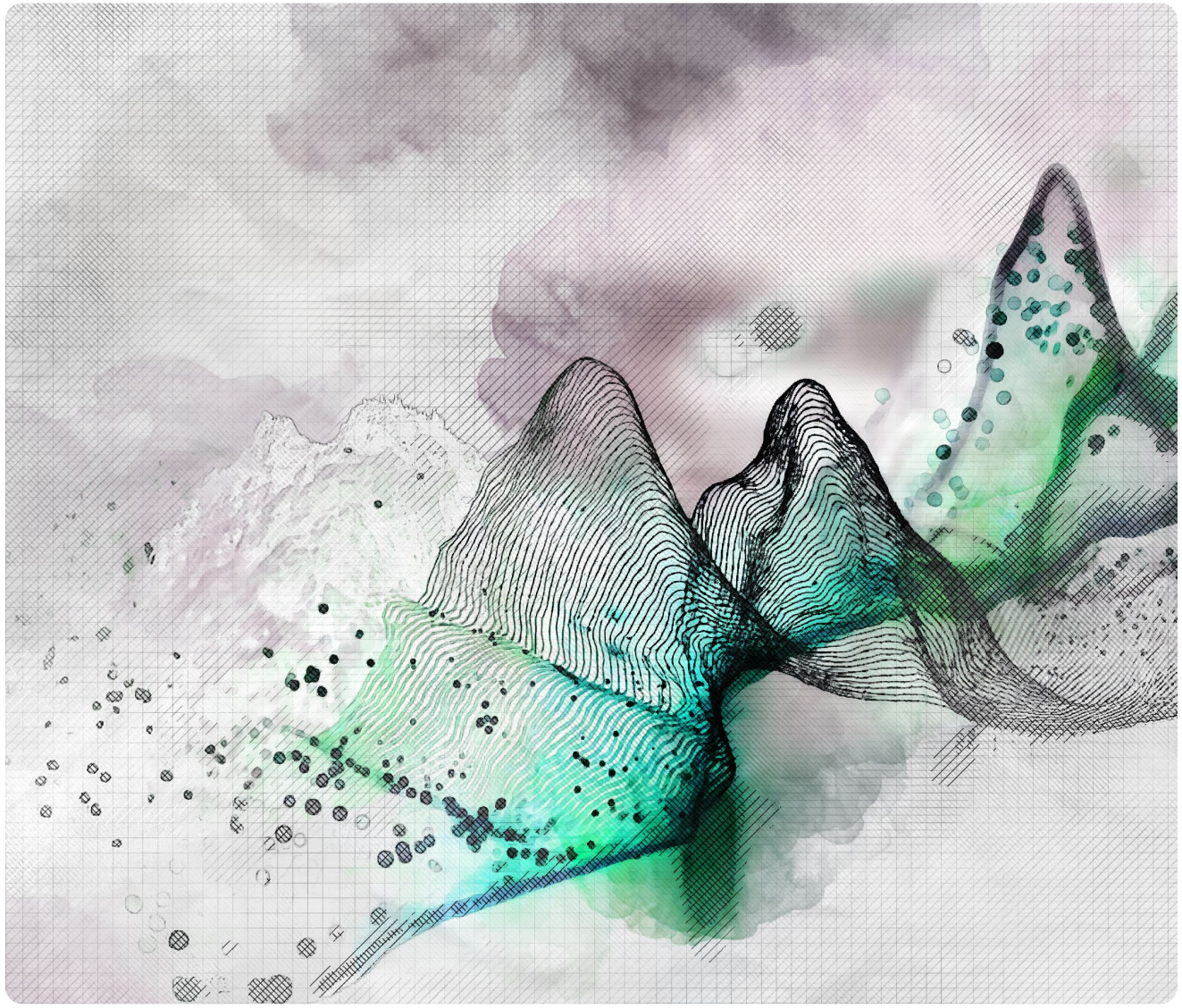
Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

On average, companies plan to have 20-30% of their engineering team focused on AI, with high growth companies having a higher proportion of their engineering team focused on AI



Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

AI Costs



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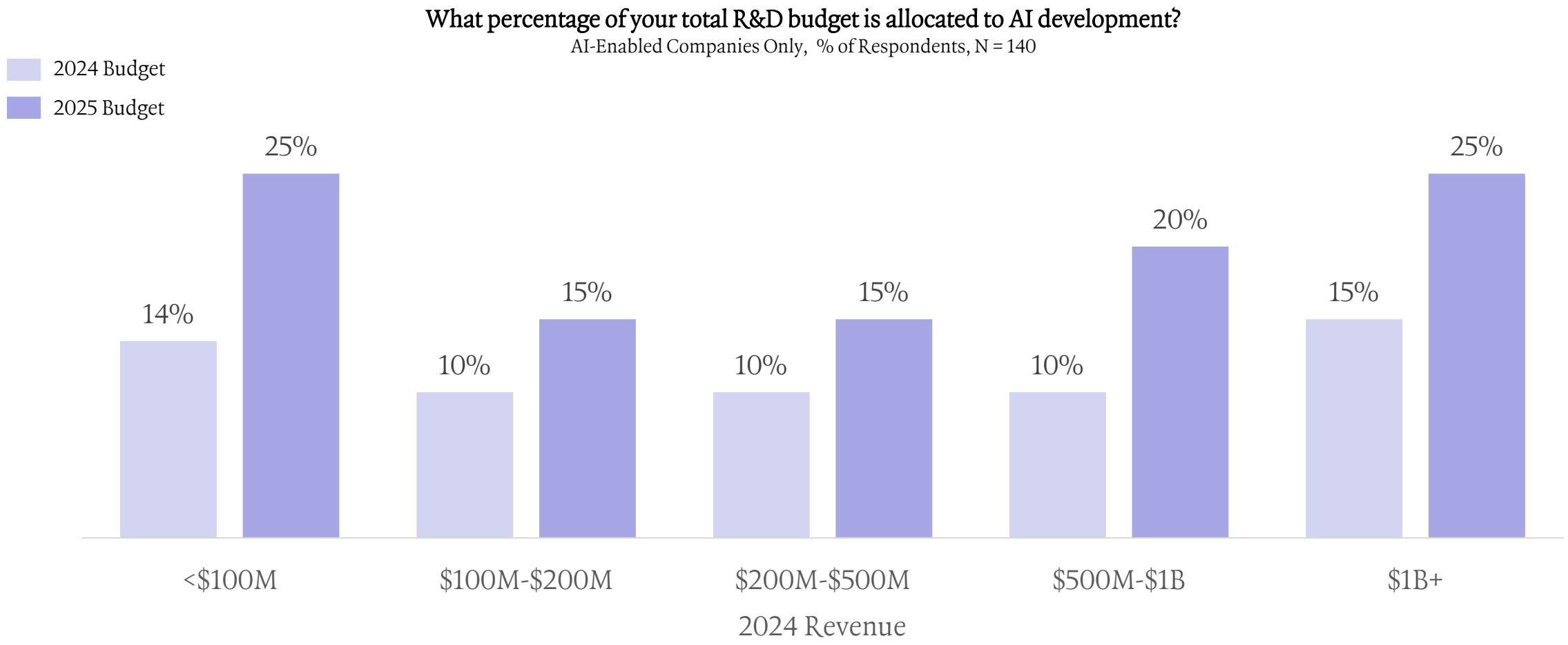
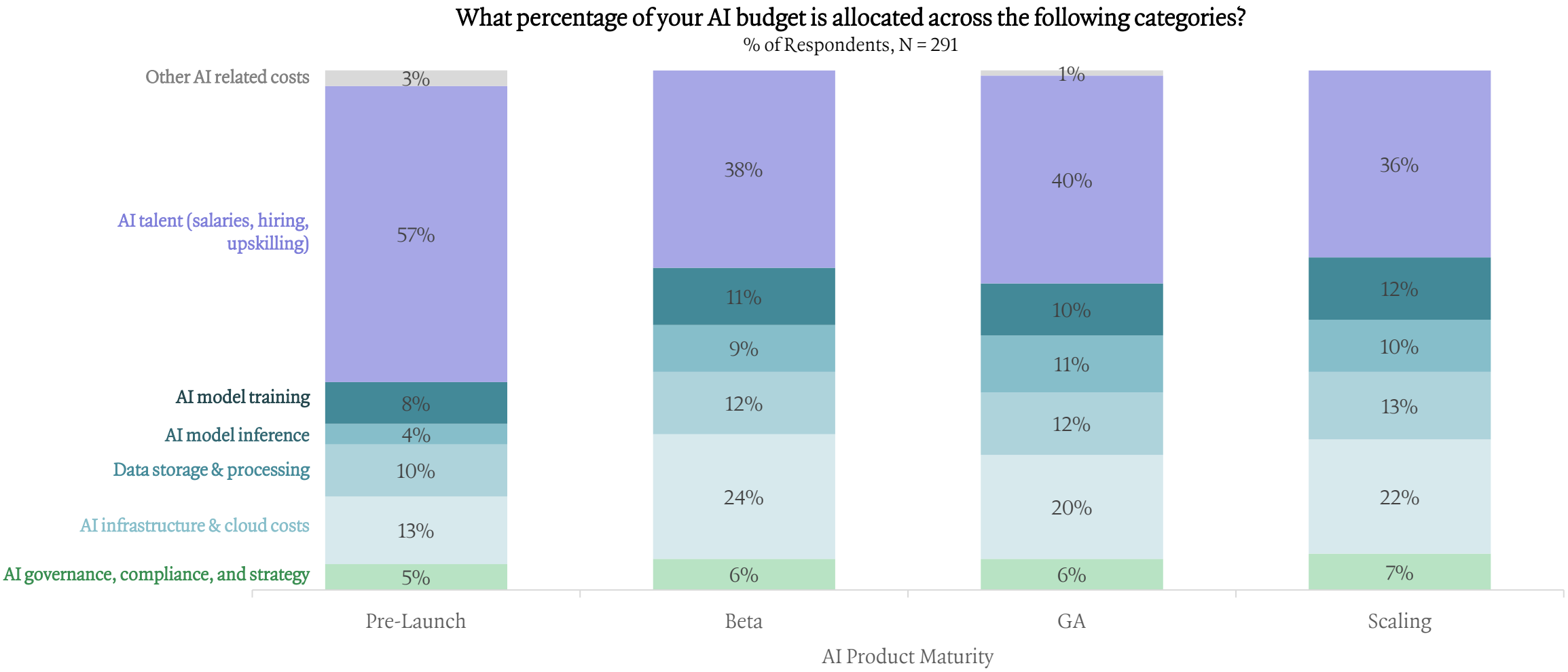
On average, companies are allocating ~10-20% of their R&D budget to AI development, with most companies planning to increase spend on AI in 2025



Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

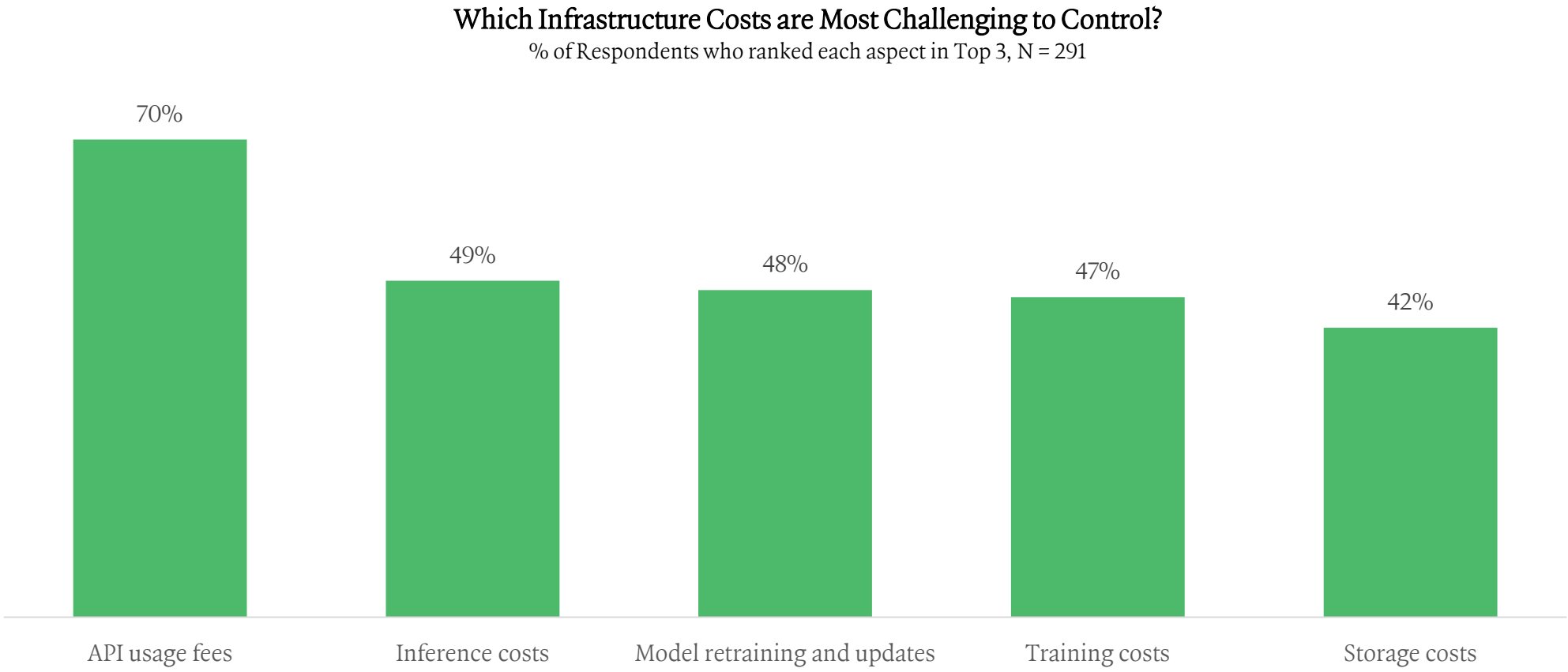
Budget Allocation

As AI products scale, the cost of talent tends to go down as a total proportion of spend; conversely, infrastructure and compute costs tend to increase as products start to see market traction



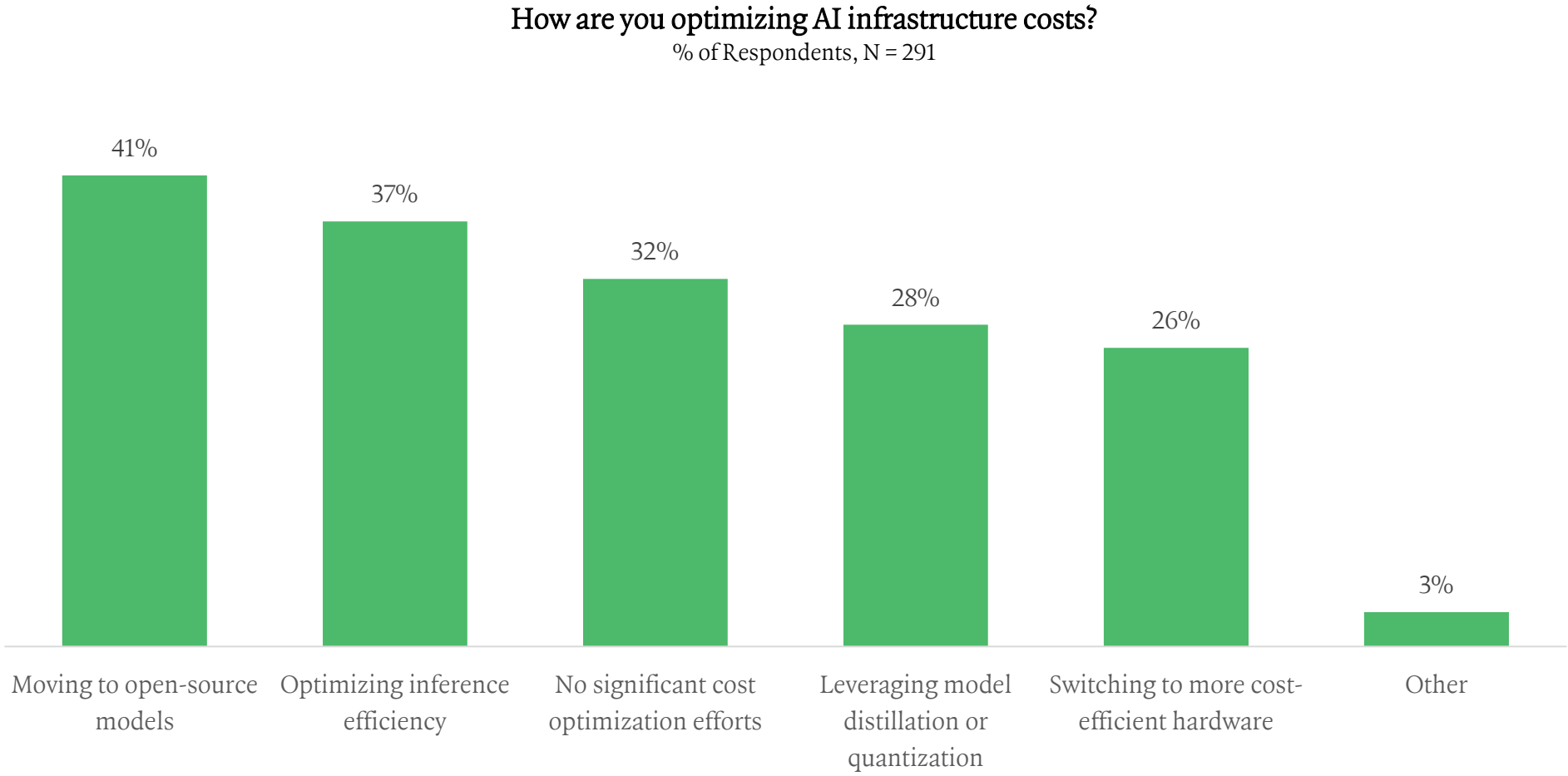
Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

Of the various infrastructure costs, respondents cited API usage fees as the cost most challenging to control, suggesting companies face the most unpredictability around variable costs tied to external API consumption



Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

To cut AI infrastructure costs, organizations are exploring open-source models and ways to optimize inference efficiency

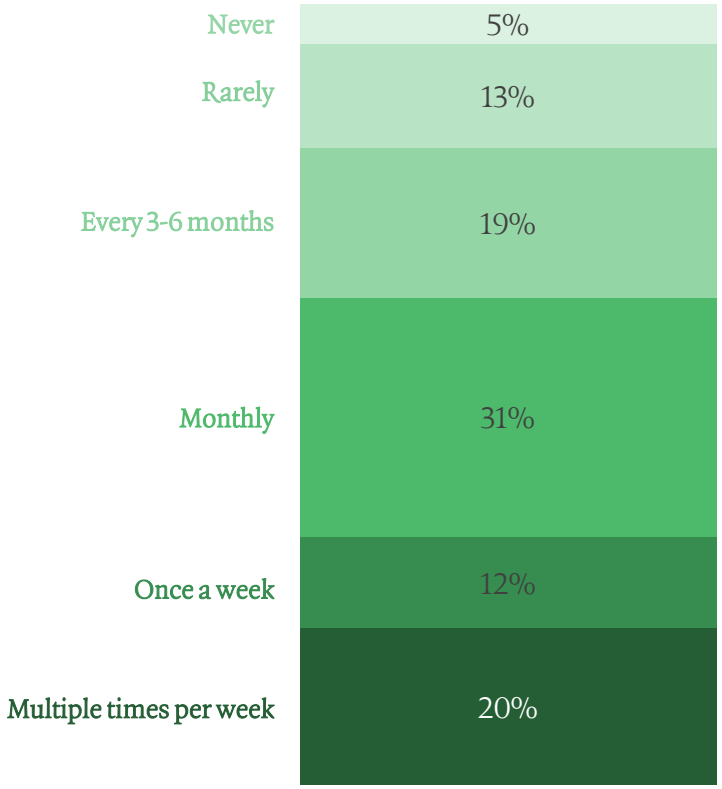


Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

Most respondents are training or finetuning models at least monthly, with estimated monthly model training costs ranging from $160K-$1.5M depending on the product maturity

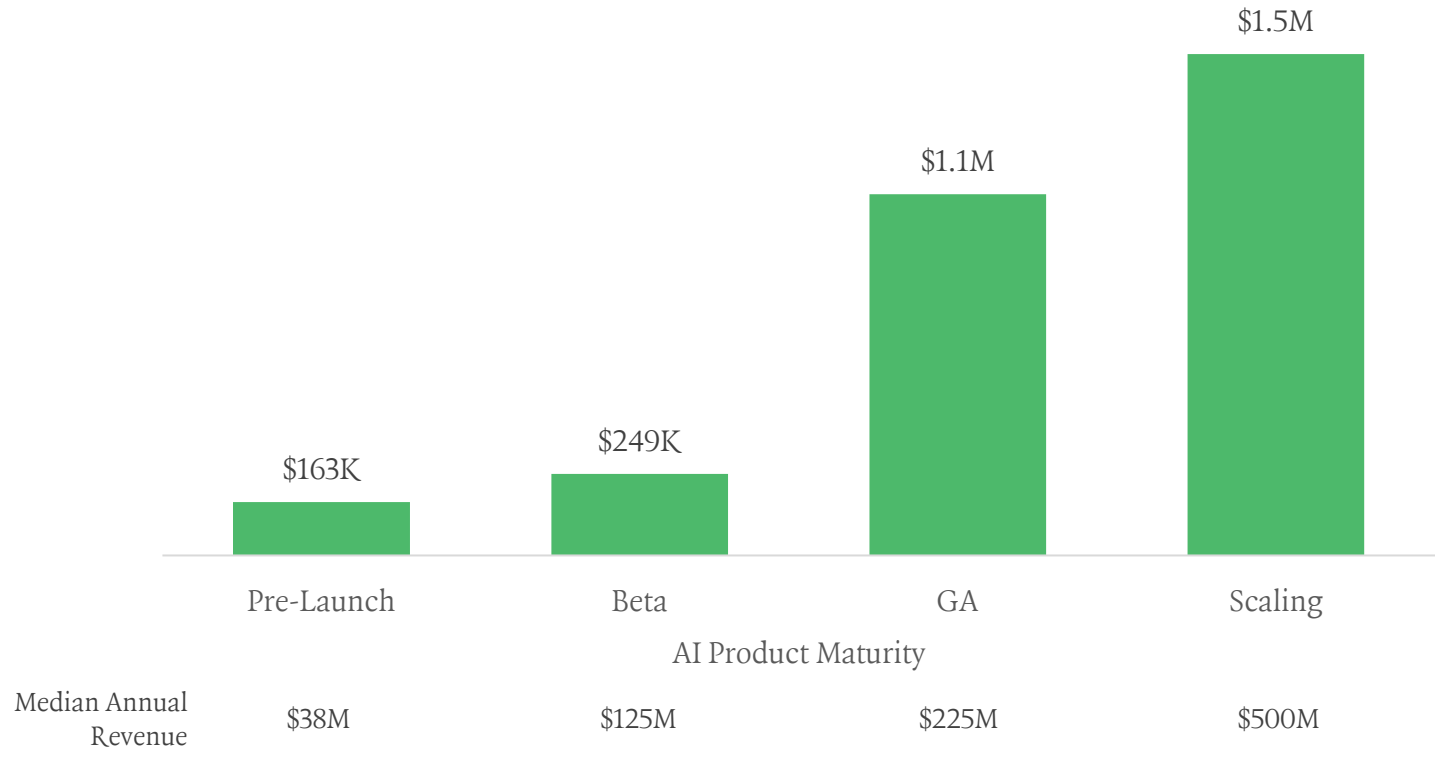
How often do you retrain or fine-tune your AI models?

% of Respondents, N = 291



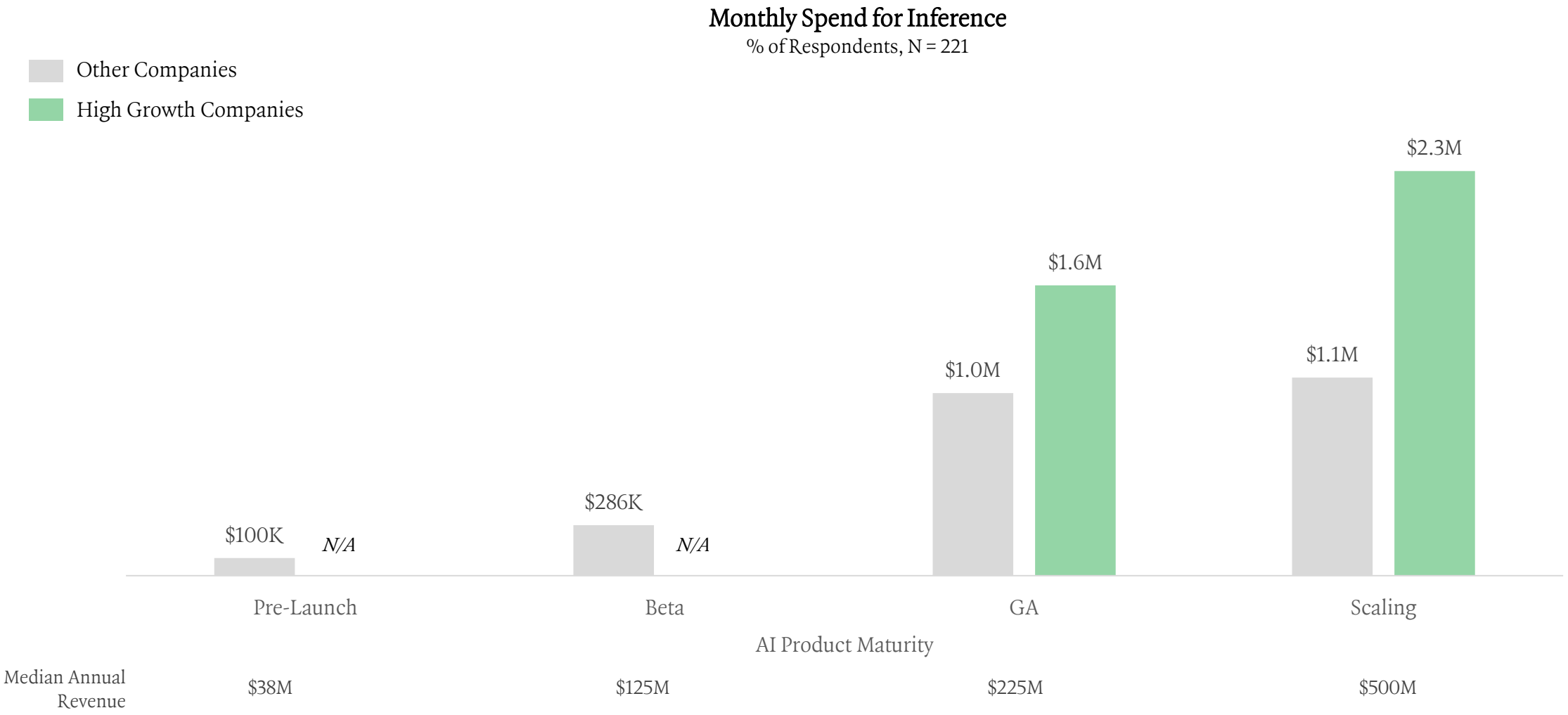
Estimated Monthly Model Training Costs

Average USD, N = 229



Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

Inference costs surge post-launch with high-growth AI companies spending up to 2x more at GA and scale than their peers

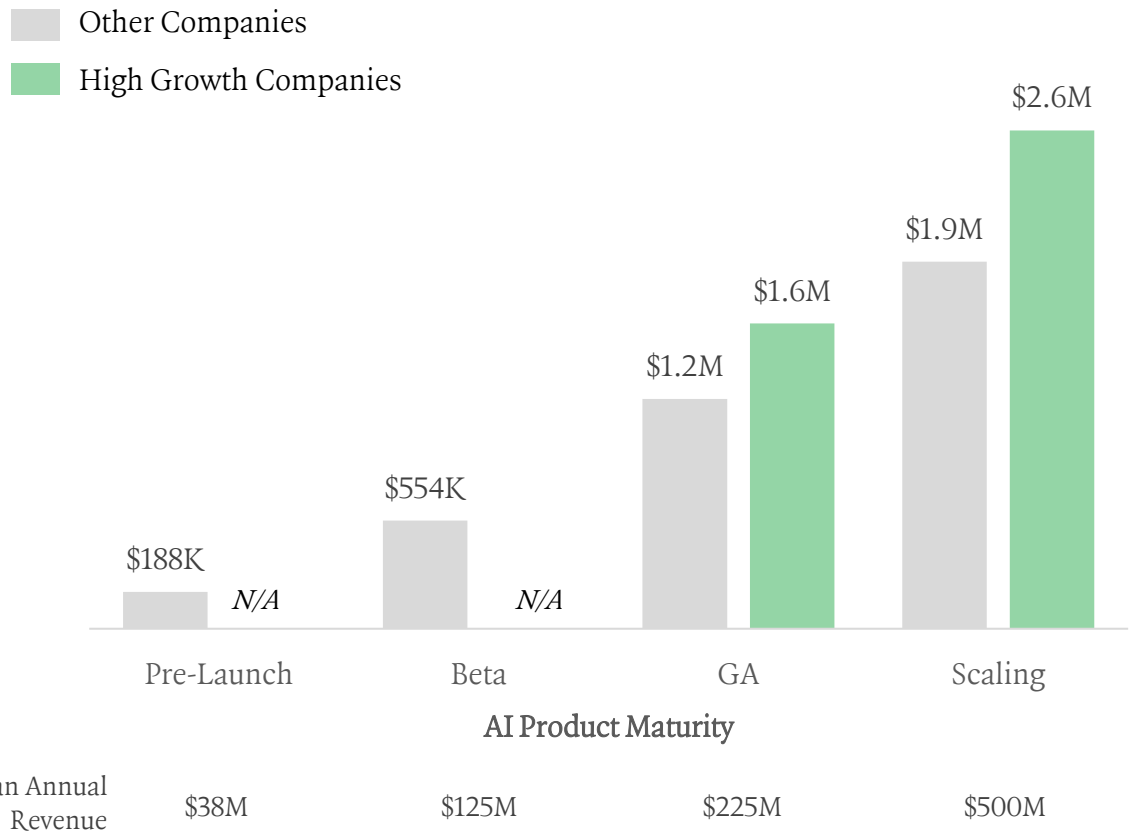


Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

Data storage & processing costs also climb steeply from GA stage onward, with high-growth AI builders spending more on data storage and processing than their peers

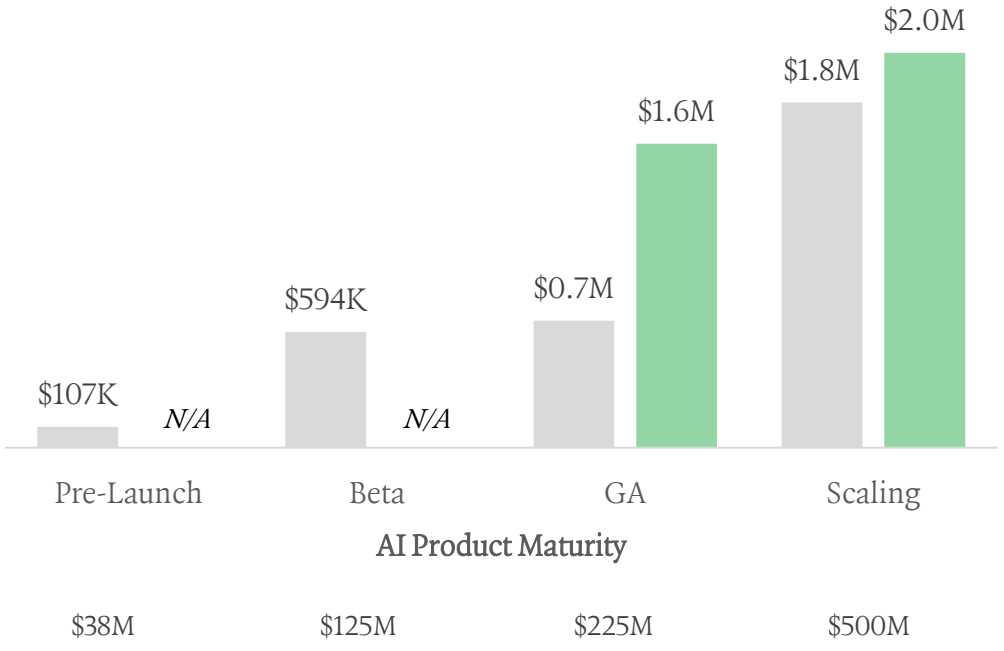
Monthly Spend for Data Storage

% of Respondents, N = 221



Monthly Spend for Data Processing

% of Respondents, N = 226



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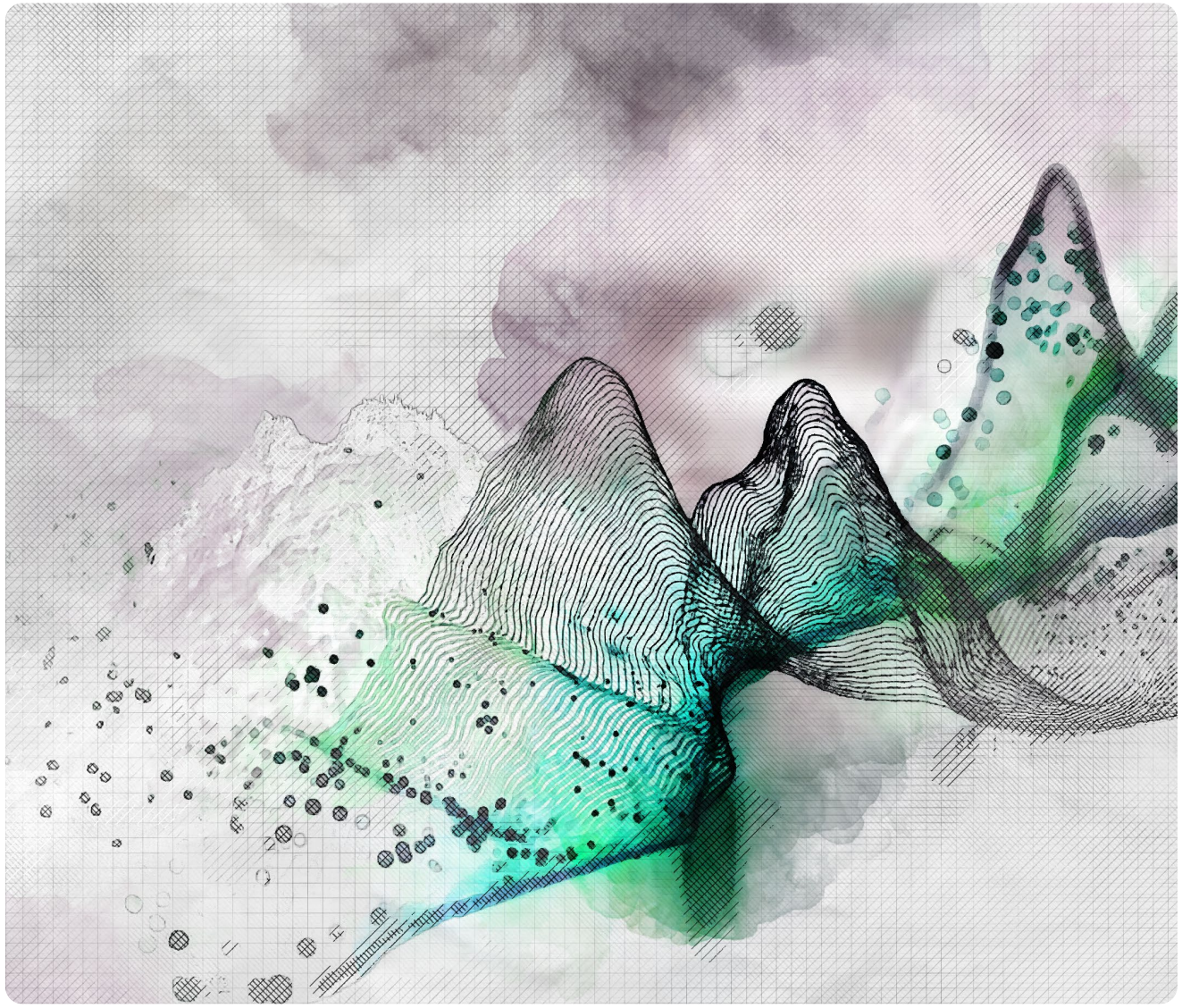
Internal Productivity



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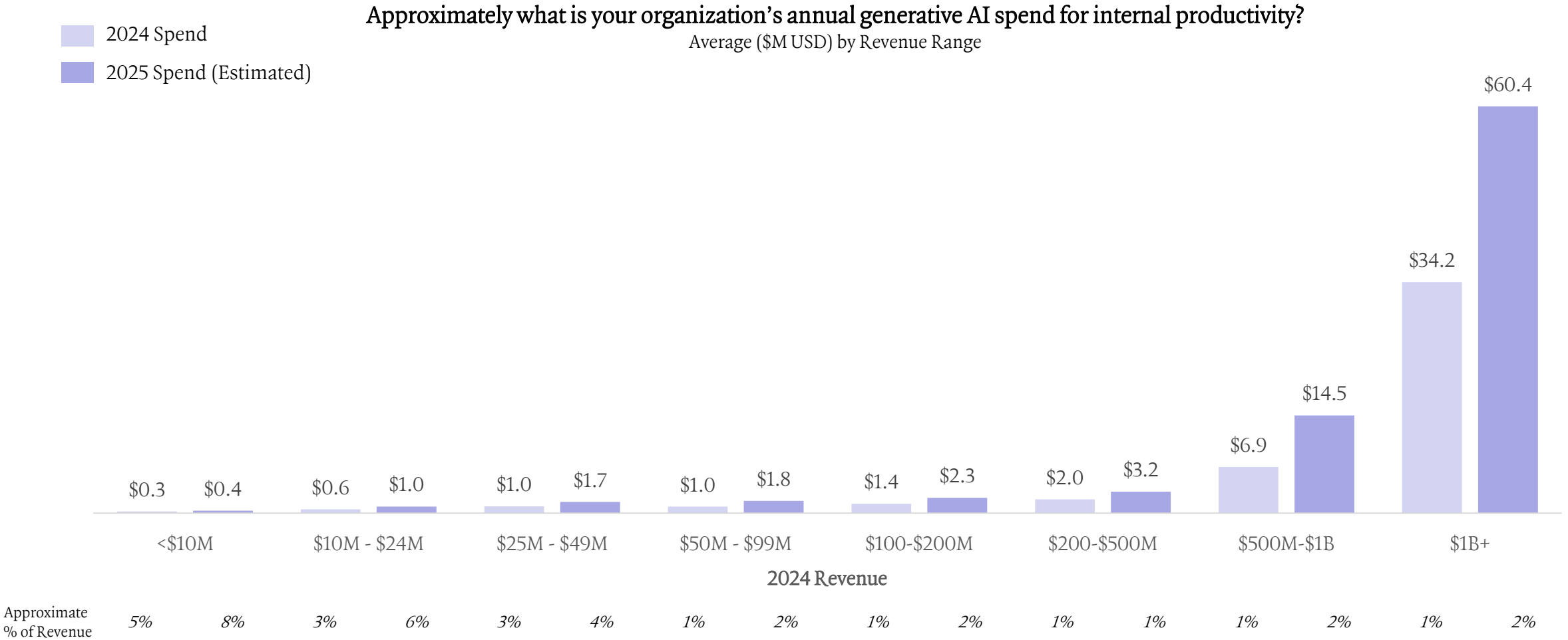
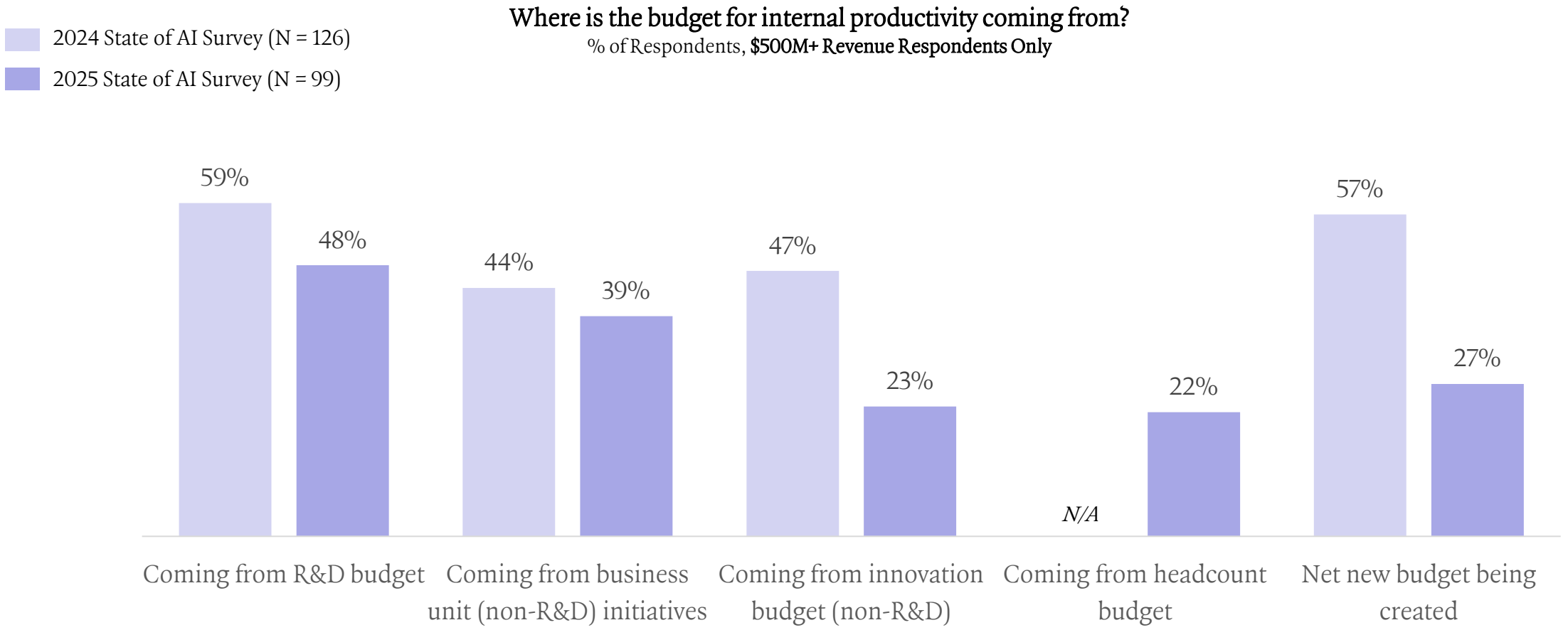
Internal AI productivity budgets are set to nearly double in 2025 across all revenue tiers, with companies spending anywhere from 1-8% of total revenue



Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

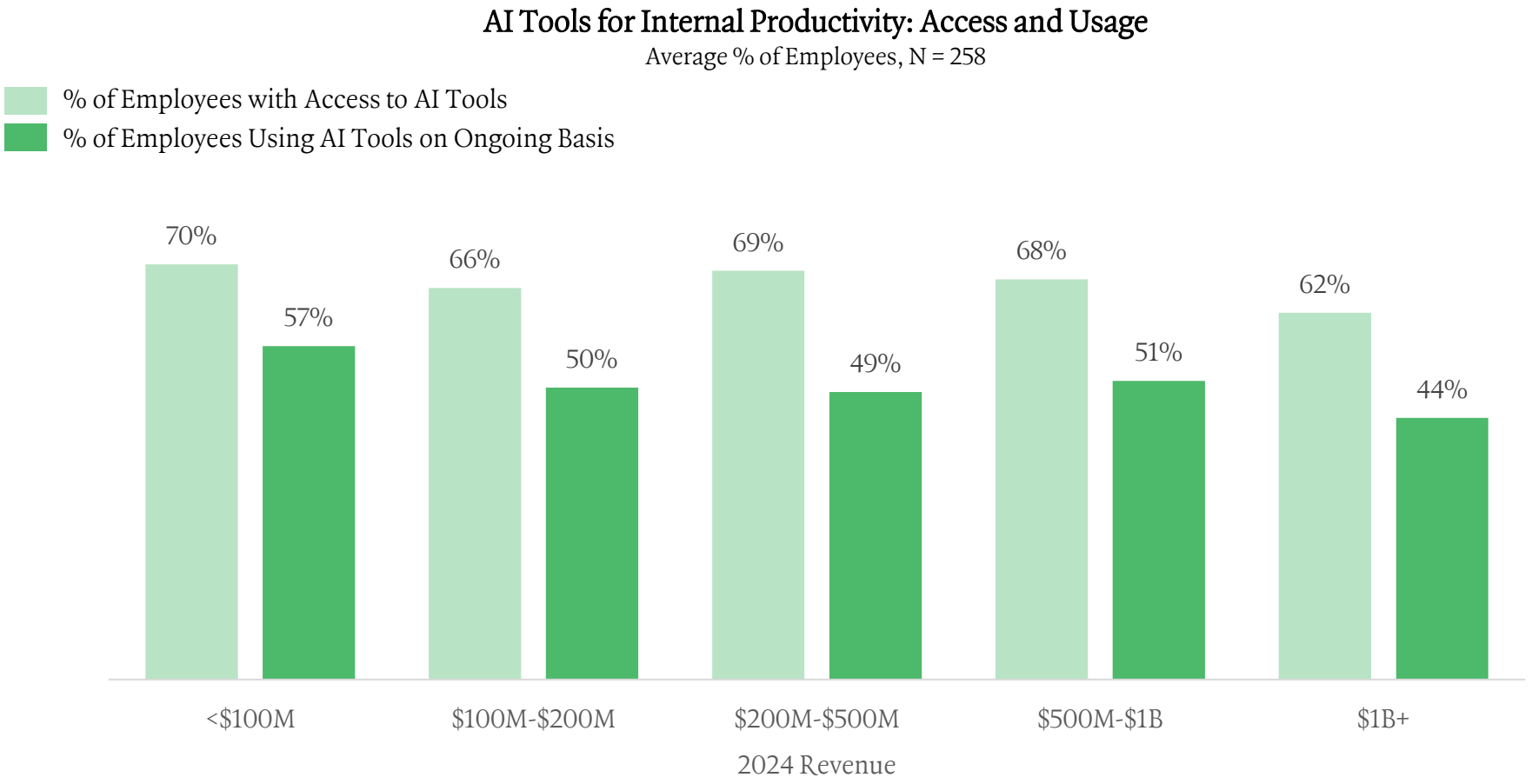
Internal Productivity Budget Sources for Enterprises

R&D budgets still remain the most common source of AI internal productivity budgets for enterprise companies; however, we are also starting to see headcount budgets being used for internal productivity spend



Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

While around 70% of employees have access to various AI tools for internal productivity, only ~50% of employees are using AI tools on an ongoing basis with adoption more difficult in mature Enterprises ($1B+ revenue)

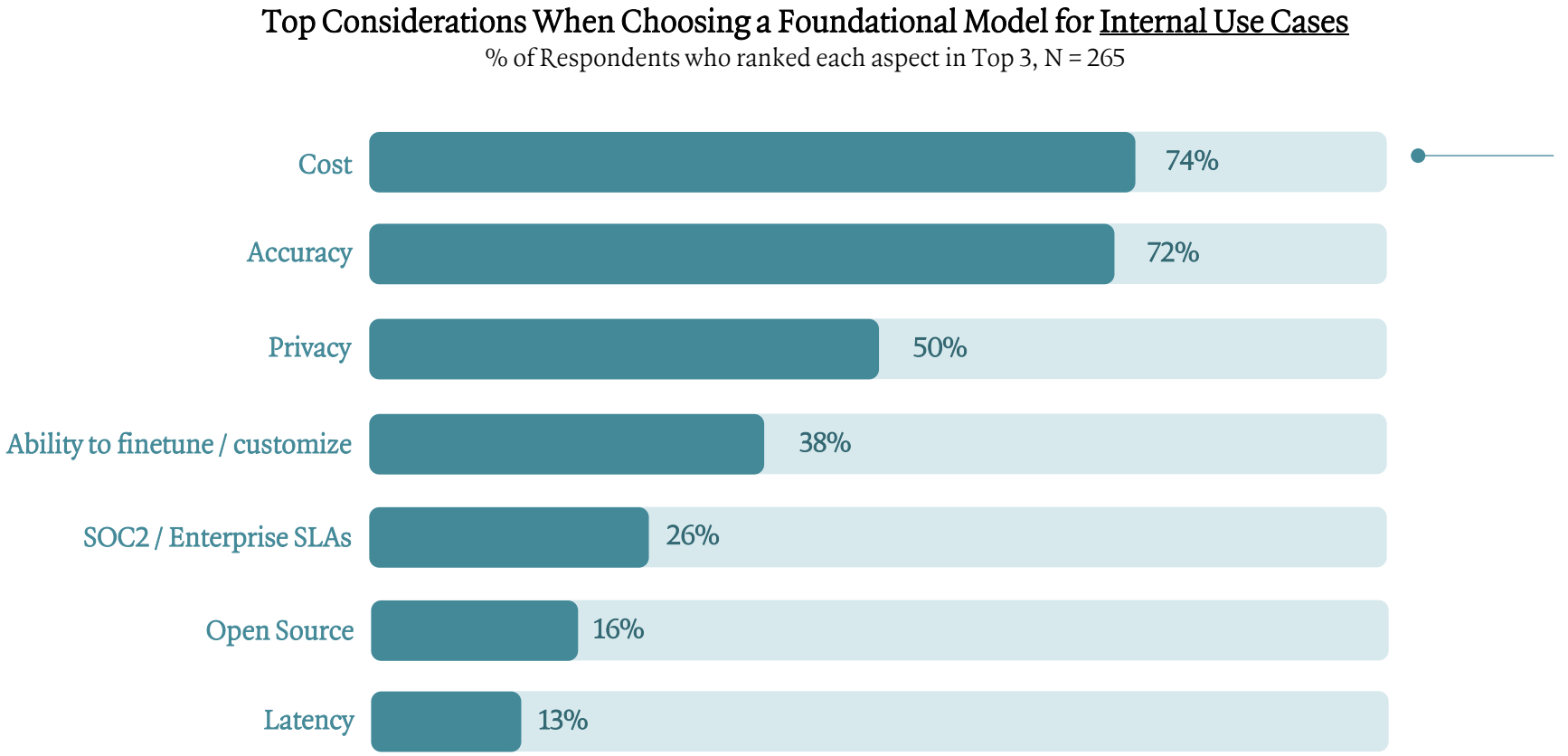


Don Vu
SVP, Chief Data & Analytics Officer, New York Life

Just deploying tools is a recipe for disappointment, particularly for large enterprises. To truly empower employees, you need to **pair availability with scaffolding** that includes training, spotlighting champions, and most importantly relentless executive support.

Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

When choosing foundational models for internal use cases, cost is the most important consideration followed by accuracy and privacy

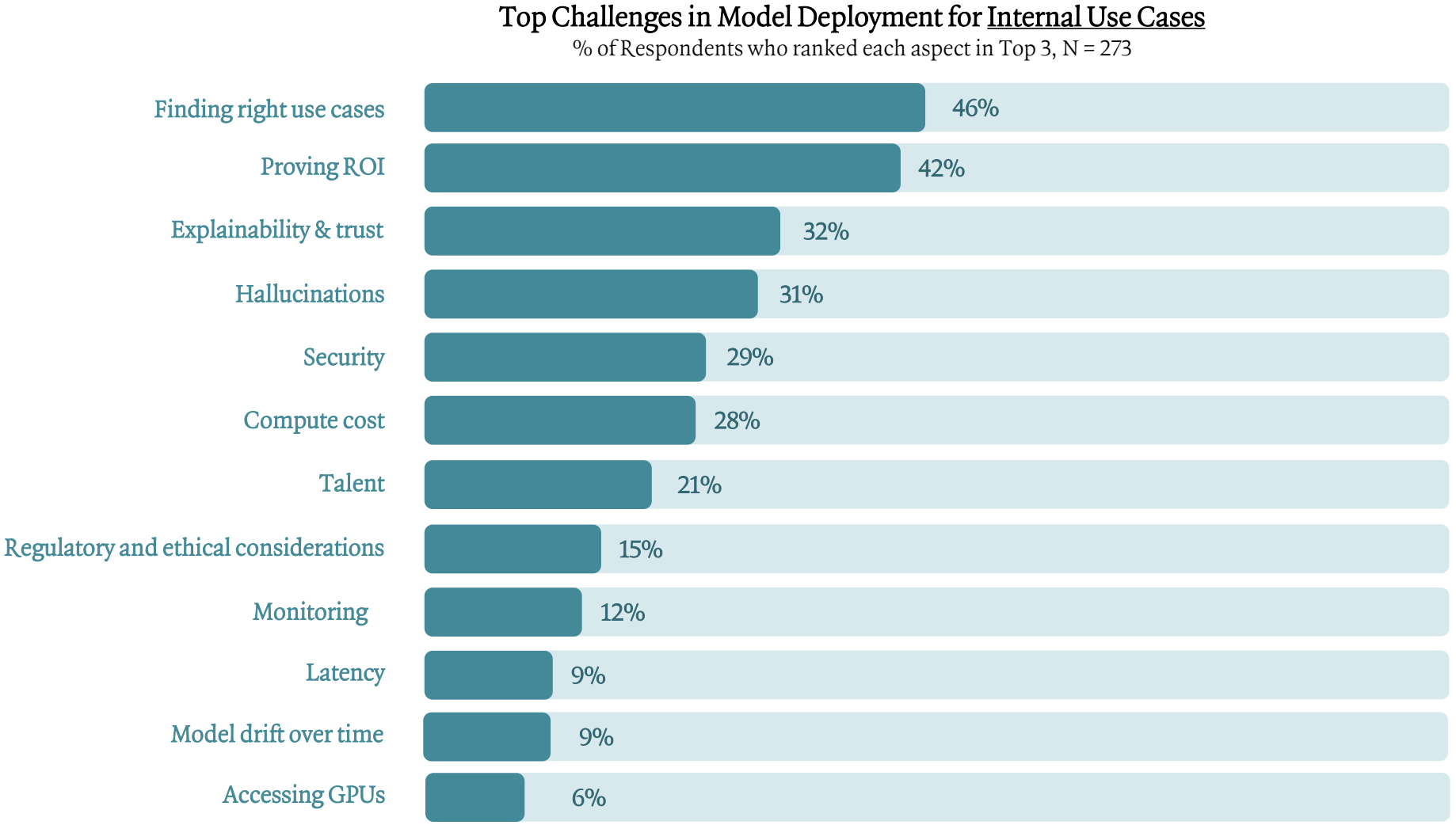


Whereas accuracy ranked as the most important factor when deploying external AI products, **cost is the most important consideration when choosing models for internal AI use cases.**

Privacy also becomes a more important consideration for internal use cases compared to external.

Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

The biggest challenges facing organizations deploying AI for internal use cases are often strategic (i.e. finding the right use cases and proving ROI) vs technical



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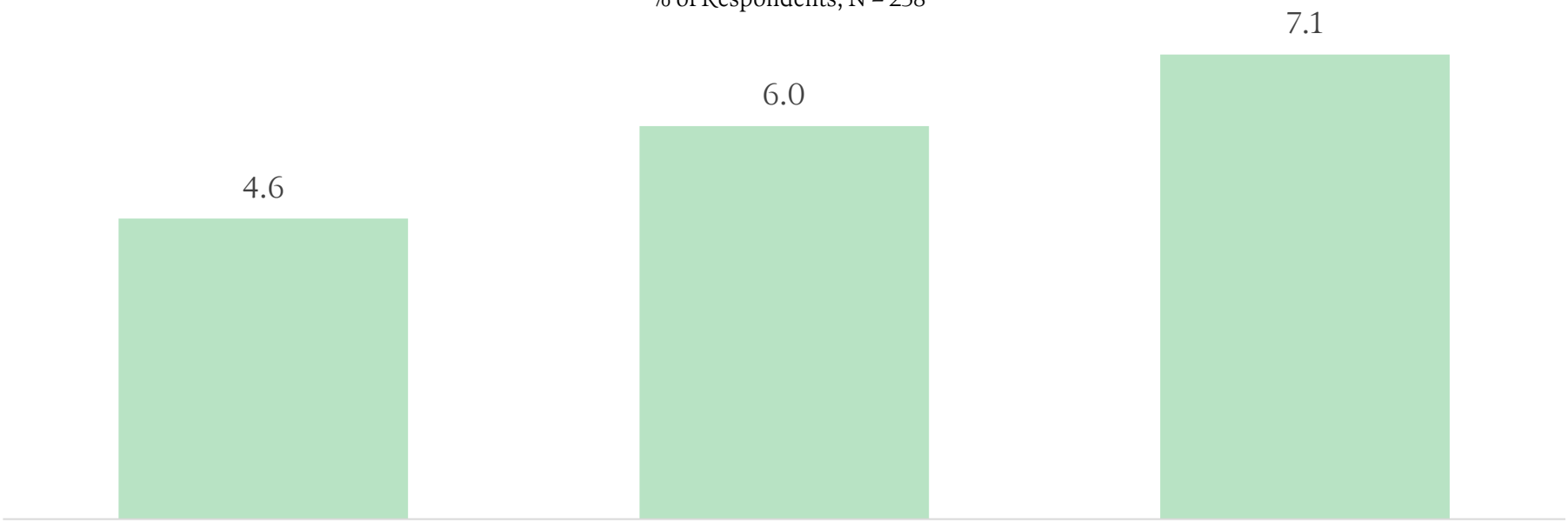
Number of Use Cases

Companies are typically exploring multiple GenAI use cases across functions, with companies that have high employee adoption using GenAI across 7+ use cases

Average Number of Use Cases by Strength of Internal AI Adoption

% of Respondents, N = 258



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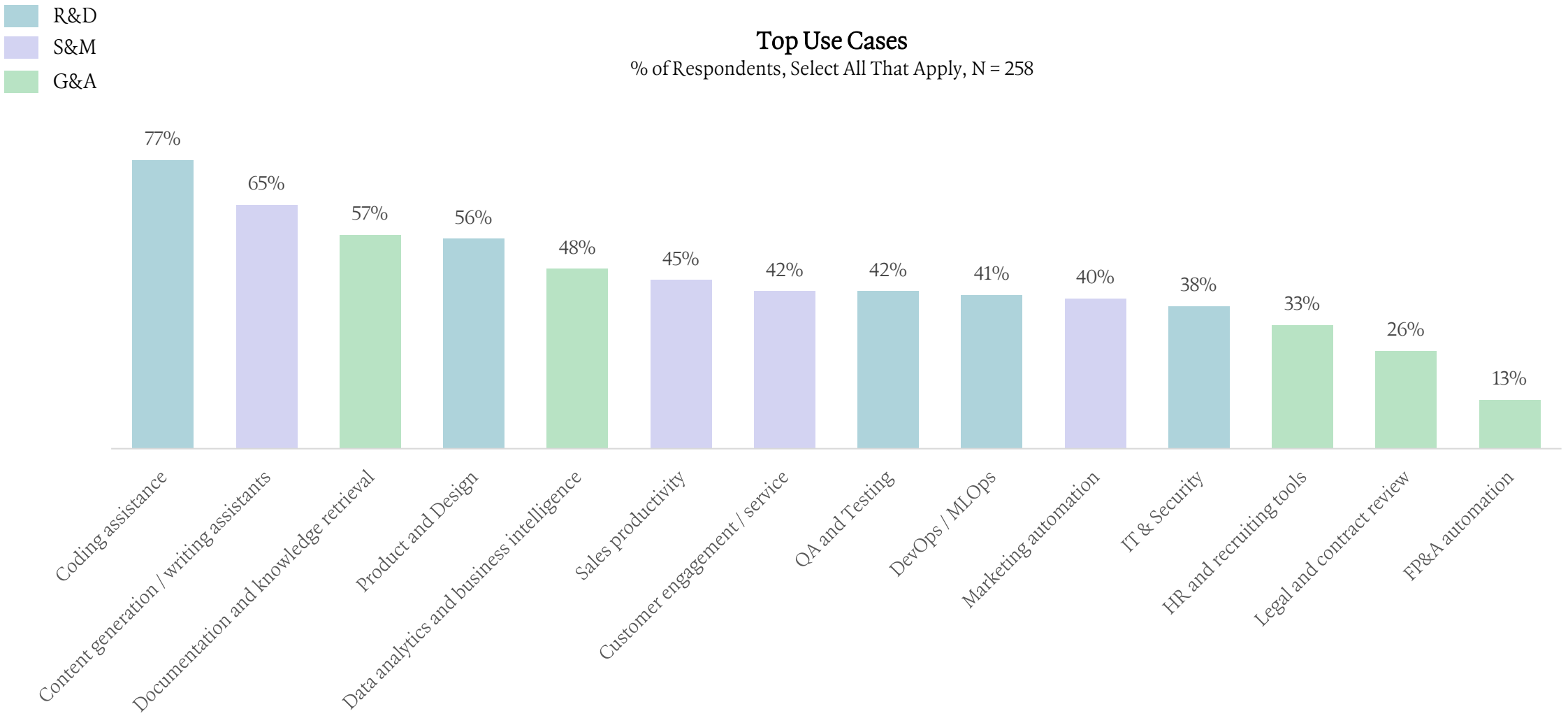
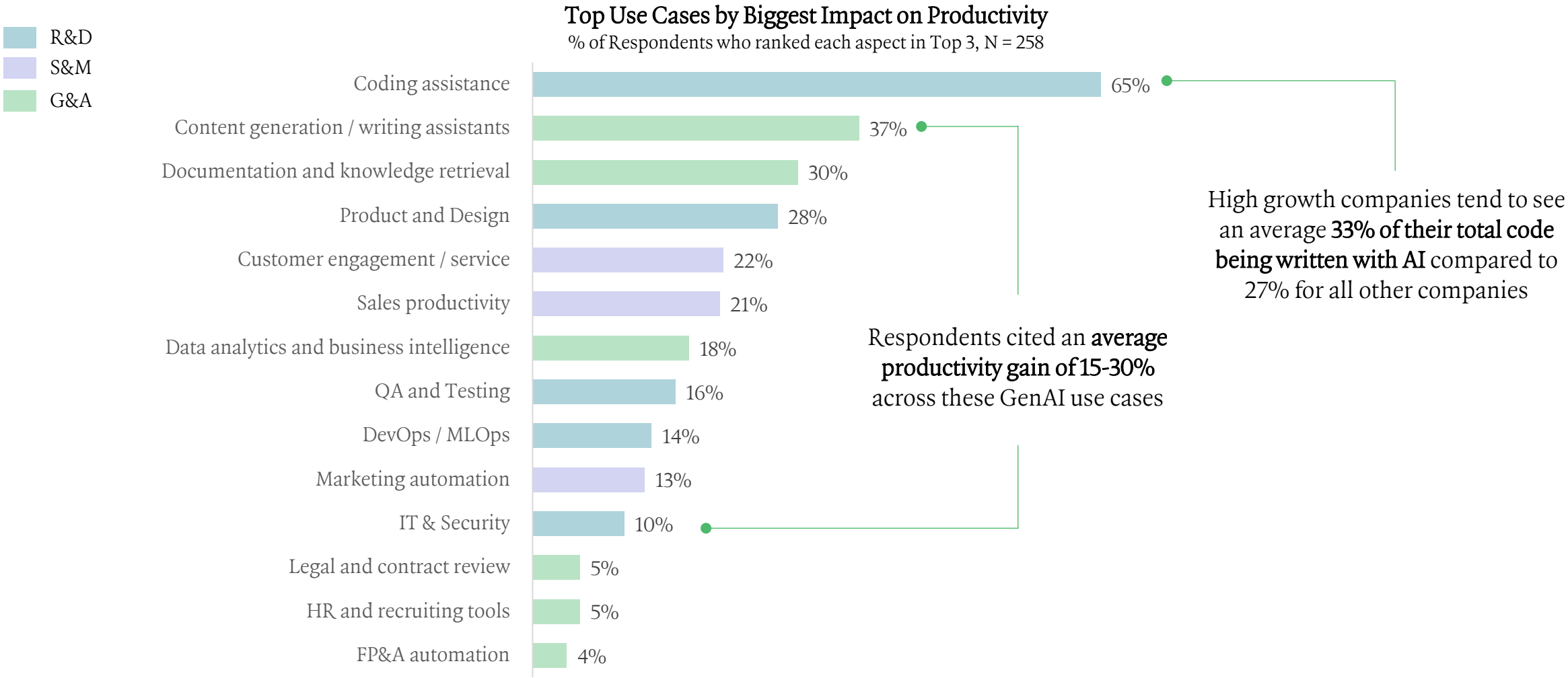
Top Use Cases: By Popularity

R&D and S&M use cases lead in popularity, while G&A use cases still lag in comparison



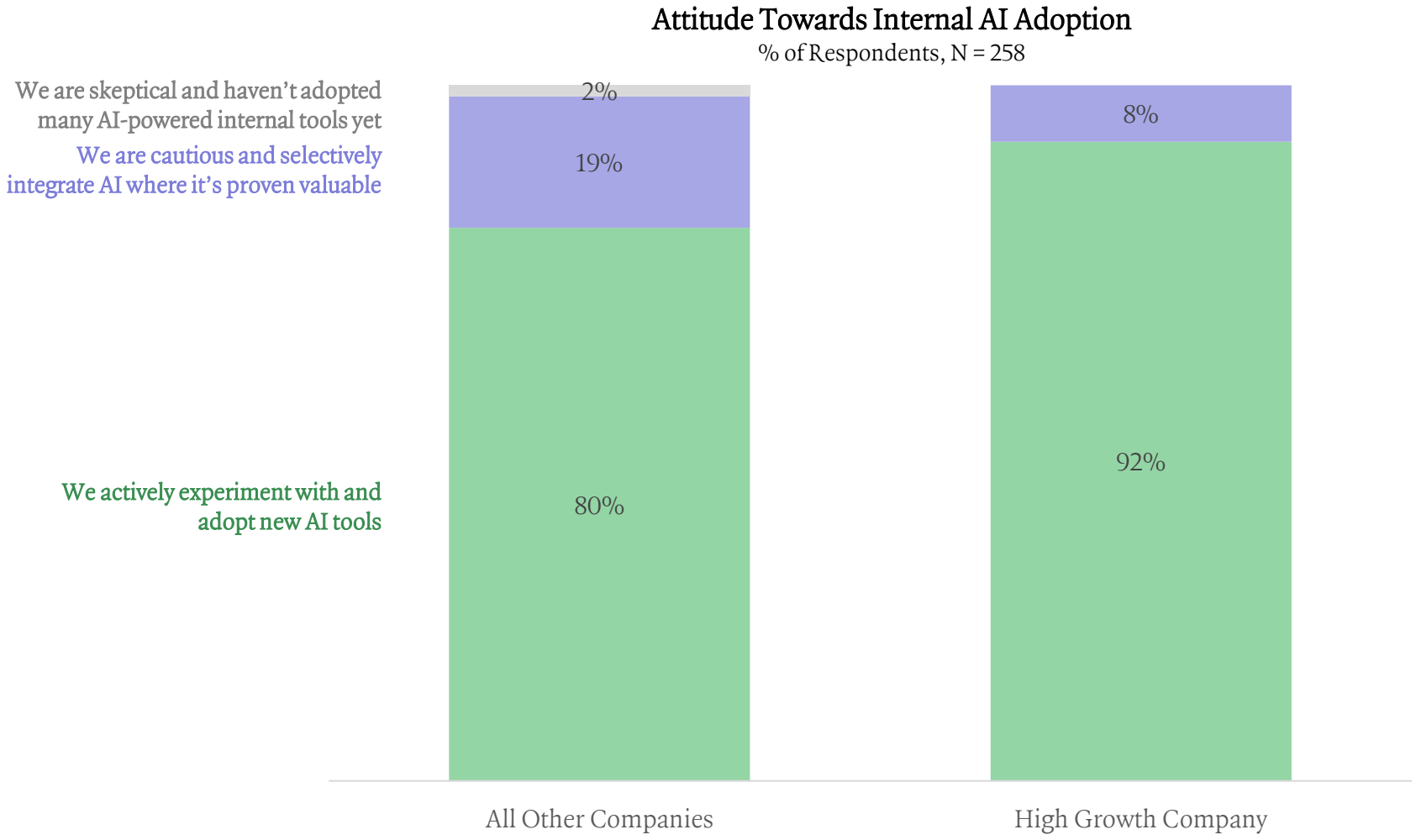
Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

Top use cases by impact mirror usage trends with coding assistance by far outpacing other use cases in terms of tangible impact on productivity



Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

High growth companies tend to more actively experiment with and adopt new AI tools, suggesting that leading companies view AI as a strategic lever and are moving faster to integrate it across internal workflows

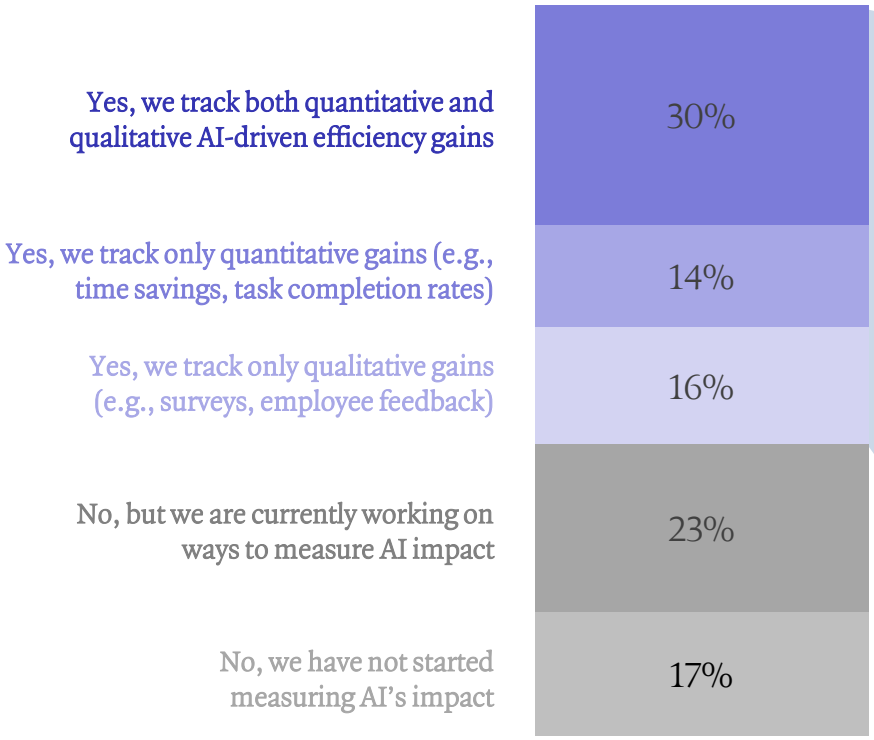


Source: Perspectives from the ICONIQ GenAI Survey (April 2025) and perspectives from the ICONIQ team and network of AI leaders consisting of our community of CIO/CDOs overseeing AI initiatives in enterprises, CTOs, our Technical Advisory Board, and others in our network

Most companies are measuring productivity improvements and cost savings from internal AI use

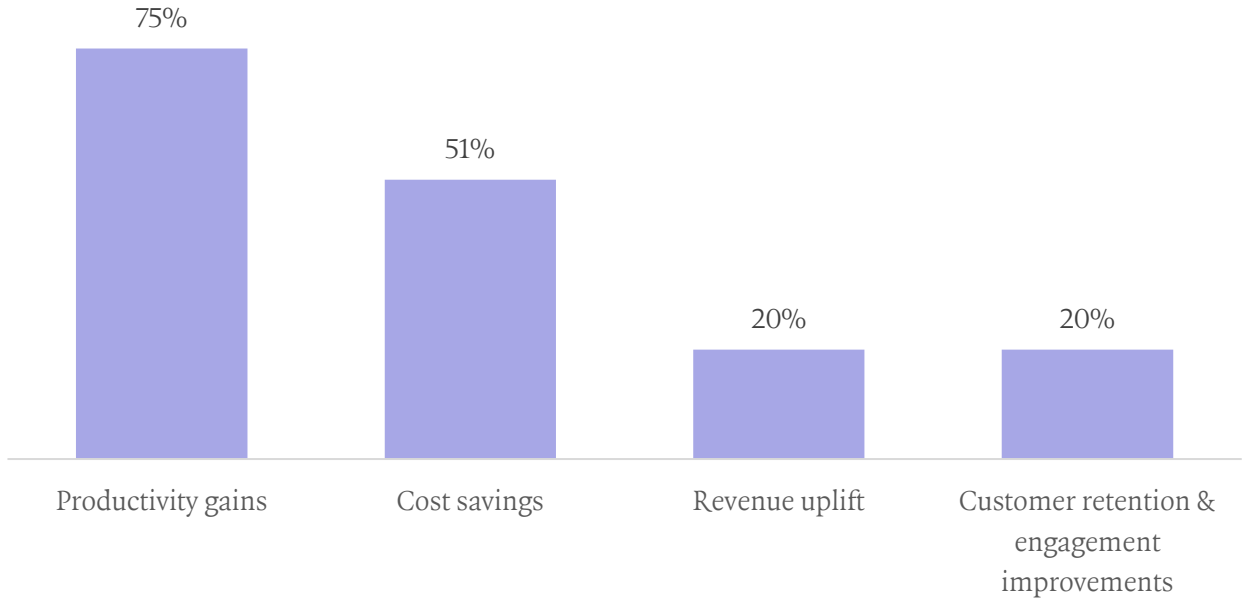
Tracking ROI

% of Respondents, N = 258



How are you measuring the impact of using AI for internal use on your business?

% of Respondents, N = 258



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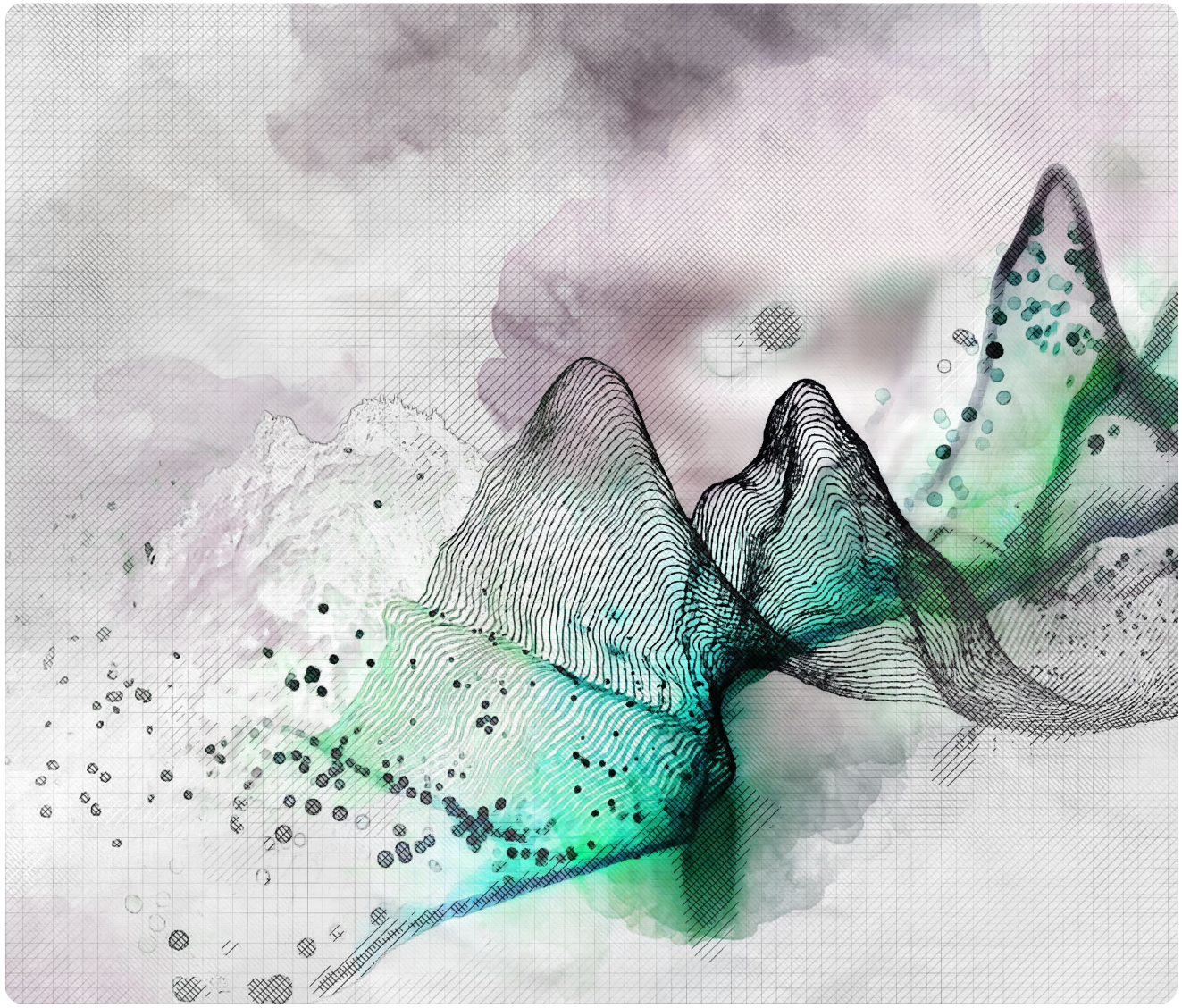
AI Builder Tech Stack



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Most Used Tools: Model Training & Finetuning

Key Takeaways

Frameworks vs Managed Platforms

- **Core deep-learning frameworks remain popular** with PyTorch and TensorFlow accounting for over half of all usage across respondents
- But they're nearly **matched by fully managed or API-driven offerings** - prevalence of AWS SageMaker and OpenAI's fine-tuning service show that teams are **split between "build your own" and "let someone else run it" approaches**

Ecosystem Players Gaining Traction

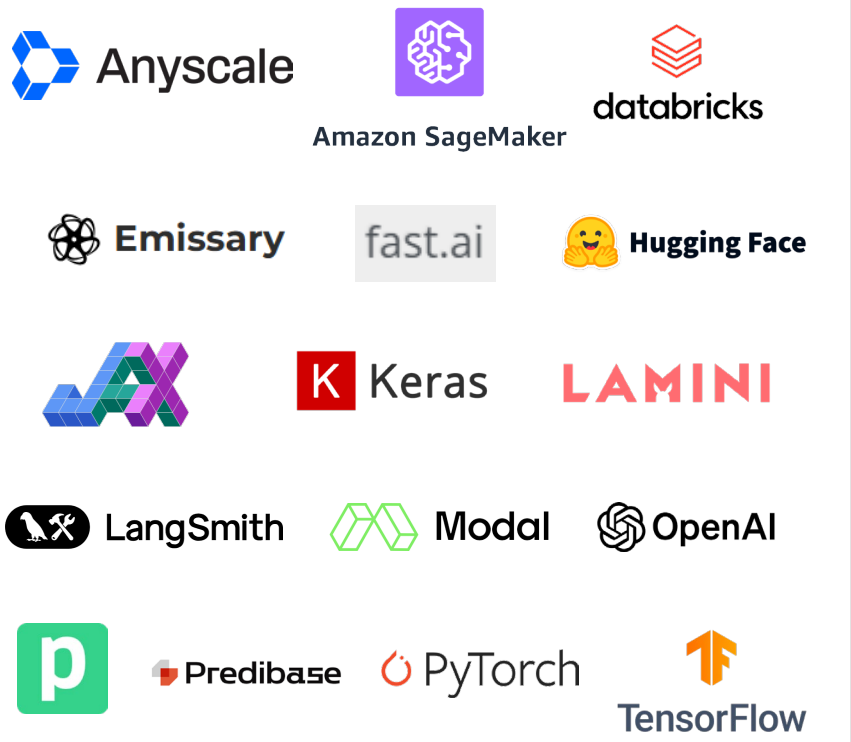
- The Hugging Face ecosystem and Databricks' Mosaic AI Training are carving out meaningful niches, **providing higher-level abstractions over raw frameworks**
- Meanwhile, more specialized or emerging tools (AnyScale, Fast.ai, Modal, JAX, Lamini) landed in the single-digit percentages, suggesting **experimentation is underway but broad adoption remains nascent**

Enterprise-Grade Needs

- Later-stage companies typically have **larger data teams, more complex pipelines, and stricter requirements around security, governance, and compliance**
- Databricks' unified "lakehouse" architecture (which blends data engineering, analytics, and ML) and AnyScale's managed Ray clusters (which simplify distributed training and hyperparameter tuning) both speak directly to those enterprise needs with **more respondents in the $500M+ revenue range using these solutions**

Most Widely Used Tools

From survey respondents; By alphabetical order



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Most Used Tools: LLM & AI Application Development

Key Takeaways

Orchestration Frameworks Reign Supreme

- Top frameworks used include LangChain and Hugging Face's toolset which signals that teams clearly **value high-level libraries that simplify prompt chaining, batching, and interfacing with either public or self-hosted models**
- Around 70% of respondents also specified that they **use private or custom LLM APIs**

Safety and Higher-Level SDKs Gaining Traction

- Roughly 3 in 10 respondents use Guardrails to enforce safety checks, and almost a quarter leverage Vercel's AI SDK (23%) for rapid deployment which shows **growing awareness that production LLM apps need both guardrails and streamlined integration layers**

Long-Tail Experimentation

- Emerging players like CrewAI, Modal Labs, Instructor, DSPy, and DotTXT had weaker usage, indicating that **while experimentation is widespread, broad standardization has yet to settle beyond the big players**

Most Widely Used Tools

From survey respondents; By alphabetical order

Azure, crewai, databricks, .TXT AI Engineering, DSPy, GUARDRAILS, Hugging Face, Instructor, LangChain, LlamaIndex, maitai, Modal, reducto, TensorFlow, TINY FISH, Vercel

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Most Used Tools: Monitoring and Observability

Key Takeaways

Incumbent Infrastructure Still Rules

- Nearly half of teams lean on their **existing APM/logging stacks** (Datadog, Honeycomb, New Relic, etc.) **rather than adopting ML-specific tools** - underscoring that ease of integration and organizational standardization often outweigh the benefits of bespoke AI monitoring

Early Traction for ML-Native Platforms

- Both LangSmith and Weights & Biases have broken through to reach ~17% adoption, showing **real appetite for turnkey solutions that instrument prompt chains, track embeddings, and surface drift without bolt-ons to legacy systems**

Fragmented Long Tail & Knowledge Gaps

- Beyond the top two ML-native names, **usage quickly fragments across players** like Arize, Fiddler, Helicone, Arthur, etc, and 10% of respondents didn't know which tool they used; this points to both **a nascent ecosystem and confusion around what "observability" even means for generative AI**

Most Widely Used Tools

From survey respondents; By alphabetical order

arize
Arthur
Braintrust
DATADOG
dynatrace
fiddler
Galileo
Langfuse
LangSmith
Latitude
Weights & Biases

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Most Used Tools: Inference Optimization

Key Takeaways

NVIDIA's Grip on Production

- TensorRT and Triton Inference Server together command over 60% adoption, underscoring **how dominant NVIDIA's stack remains for squeezing latency and throughput out of GPU-based deployments**

Cross-Platform Alternatives Gaining Share

- The ONNX Runtime (18%) is the top non-NVIDIA solution, reflecting teams' **desire for hardware-agnostic acceleration across CPUs, GPUs, and accelerators**
- TorchServe (15%) likewise shows that pure-PyTorch serving still has a foothold, especially for CPU-only workloads or simpler containerized setups

Knowledge Gaps & Untapped Potential

- With 17% respondents they didn't know which optimization they use and 14% reporting "None," there's clear **confusion or inexperience around inference tuning**, suggesting an opportunity for education (and tooling) around quantization, pruning, and efficient runtimes - especially for teams running at scale

Most Widely Used Tools

From survey respondents; By alphabetical order

Azure

Hugging Face

ONNX RUNTIME

OpenVINO

PYTORCH

TensorRT

NVIDIA TRITON INFERENCE SERVER

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Most Used Tools: Model Hosting

Key Takeaways

Direct-from-Provider Is King

- The majority of teams hit model hosts directly via OpenAI, Anthropic, etc. underscoring that the path of least resistance remains **calling the vendor's own inference APIs rather than building or integrating through a middle layer**

Hyperscalers Close Behind

- AWS Bedrock and Google Vertex AI have carved out substantial share, reflecting **strong demand for unified, enterprise-grade ML platforms that bundle hosting with governance, security, and billing in a single pane**
- In particular, a **greater number of later-stage companies ($500M+ revenue) reported using hyperscaler solutions**

Fragmented Alternatives & Emerging Players

- Beyond the big three, **usage quickly fragments across players like Fireworks, Modal, Together.ai, AnyScale, Baseten, Replicate, Deep Infra, etc.**
- This long tail suggests teams are **still exploring specialty hosts, often driven by unique pricing, performance SLAs, or feature sets** (e.g., custom runtimes, on-prem options)

Most Widely Used Tools

From survey respondents; By alphabetical order

Anyscale, aws, Azure, baseten, databricks, deepinfra, Emissary, fal, Fireworks AI, Modal, Replicate, together.ai, Vertex.ai

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Most Used Tools: Model Evaluation

Key Takeaways

No Clear Stand-alone Leader

- **Nearly 1 in 4 teams use mostly built-in evaluation features from platforms like Vertex, Weights & Biases, or Galileo** while 20% of respondents simply "didn't know" which tool they use, signaling many organizations are still leaning on the evaluation capabilities baked into their existing ML stacks rather than adopting a dedicated framework

Emerging Specialized Frameworks

- **LangSmith and Langfuse lead the pack of purpose-built evaluation tools**, with HumanLoop and Braintrust also showing traction; these platforms are winning mindshare by offering richer prompt-level metrics, customizable test suites, and drift detection out of the box

Knowledge Gaps and DIY

- Almost a quarter of respondents did not know which evaluation tool they used or did not have an evaluation tool in place, signaling **both confusion around what "evaluation" entails for generative AI and the risk of unmonitored model regressions**
- Meanwhile, some respondents are also **rolling their own evaluation pipelines, suggesting off-the-shelf tooling hasn't yet covered all use cases**

Most Widely Used Tools

From survey respondents; By alphabetical order

Braintrust
COVAL
Galileo
Haize Labs
Humanloop
Langfuse
LangSmith
Patronus AI
Pi Labs
promptfoo
vellum
Vertex.ai
Weights & Biases

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Most Used Tools: Data Processing & Feature Engineering

Key Takeaways

Classic Big Data Tools Still Dominate

- Apache Spark (44% of respondents) and Kafka (42% of respondents) lead the pack, underscoring that **at scale, teams default to battle-tested, distributed batch-and-stream frameworks for ETL and real-time data ingestion**

Python Power Base

- Despite heavy big-data footprints, 41% of respondents still lean on Panda - showing that **for smaller datasets, prototyping, or edge cases, the simplicity and flexibility of in-memory Python tooling remain indispensable**

Feature Stores on the Horizon

- Only 17% are using a dedicated feature store, indicating that **while the concept of "build once, serve everywhere" for features is gaining visibility, most organizations haven't yet operationalized it at scale**
- **As maturity grows, we'll likely see feature stores and lightweight orchestrators** (Dask, Airflow, etc.) climb the ranks - but for now the Apache ecosystem rules

Most Widely Used Tools

From survey respondents; By alphabetical order

Apache Airflow
Apache Spark
dask
Google Big Query
kafka
pandas
redis
snowflake

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Most Used Tools: Vector Databases

Key Takeaways

Search Engines Evolve Into Vector Stores

- Elastic and Pinecone lead adoption, reflecting how **teams either retrofit existing full-text search platforms for embeddings or adopt purpose-built, managed vector engines**

Redis & the "Long Tail"

- **Redis shows the appeal of leveraging in-memory data stores you already run**, while other solutions like Clickhouse, AlloyDB, Milvus, PGVector, etc, underscores that many organizations are **experimenting with different backends to balance cost, latency, and feature needs**

Rise of Open-Source Solutions

- Specialist open-source tools like Chroma, Weaviate, Faiss, Qdrant, and Supabase's vector addon are chipping away at the early leaders, signaling **a competitive battleground for ease-of-use, scaling, and cloud-native integrations**

Most Widely Used Tools

From survey respondents; By alphabetical order

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Most Used Tools: Synthetic Data & Data Augmentation

Key Takeaways

In-House Reigns Supreme

- Over **half of teams (52%) build their own tooling**, suggesting that off-the-shelf providers still struggle to cover every use case or integrate with existing pipelines

Scale AI is the clear vendor leader

- At 21% adoption, **Scale AI is the go-to third-party synthetic-data platform** - but even it only reaches one in five organizations

Early Traction for Programmatic Frameworks

- Snorkel AI and Mostly AI show that **programmatic labeling and generation tools are gaining mindshare, but remain far behind custom solutions**

Most Widely Used Tools

From survey respondents; By alphabetical order

David AI
gretel
Hugging Face
Invisible
MERCOR
MOSTLY·AI
scale
Snorkel
TURING

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Most Used Tools: Coding Assistance

Key Takeaways

Dominance of First Movers

- **GitHub Copilot is used by nearly three-quarters of development teams**, thanks to its tight VS Code integration, multi-language support, and backing by GitHub's massive user base
- Copilot's network effects and product-market fit make it hard to dislodge, but the **strong second-place showing for Cursor (used by 50% of respondents) signals appetite for diverse IDE integrations**

Long Tail of Offerings Lag

- After the top two, adoption drops off sharply with a **fractured long tail of solutions, suggesting that while most teams have trialed at least one assistant, very few have standardized on alternatives**
- Low-code or no-code solutions like Retool, Lovable, Bolt, and Replit also had honorable mentions indicating that there is **increasing appetite in the market for idea-to-application solutions**

Most Widely Used Tools

From survey respondents; By alphabetical order

Augment, bolt, Claude, codeium, Cline, Cognition, Continue, CURSOR, FACTORY, GitHub Copilot, GitLab, Lovable, replit, Retool, ROOCODE, sourcegraph, tabnine

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Most Used Tools: DevOps and MLOps

Key Takeaways

MLflow Leads—but No Monopoly

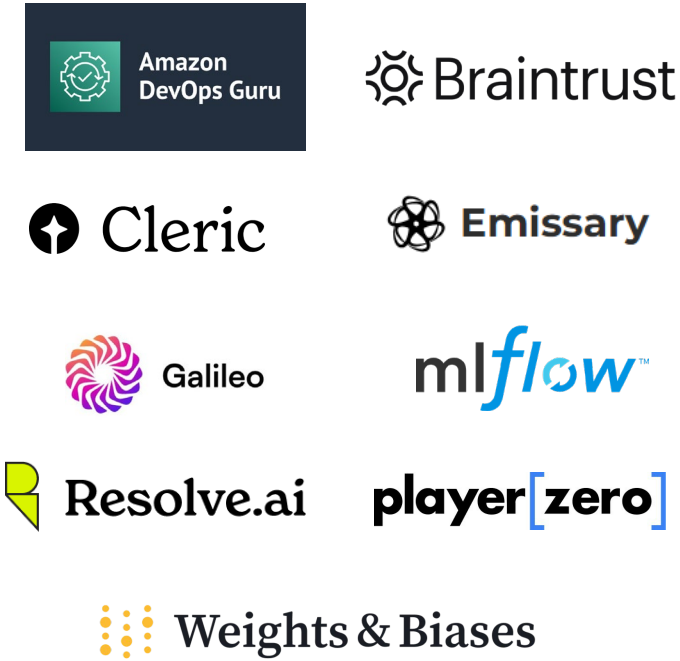
- MLflow was used by 36% of respondents and the **clear frontrunner for experiment tracking, model registry, and basic pipeline orchestration** – this is only just over one-third of teams, indicating plenty of room for alternatives
- Weights & Biases also holds strong share with 20% of respondents using, reflecting **its appeal as a managed SaaS for tracking, visualization, and collaboration**
- **Beyond the top two, usage quickly fragments** – 16% "don't know" which tools power their MLOps and other tool mentions include Resolve.ai, Cleric, PlayerZero, Braintrust, etc. This points to both confusion around responsibilities (DevOps vs. MLOps) and a market still sorting itself out

Gap between Tracking and Full-Scale Ops

- The dominance of tracking-first platforms like MLflow and W&B suggests that **many teams haven't yet adopted end-to-end MLOps suites - continuous delivery, drift monitoring, or automated rollback remain work in progress for most**

Most Widely Used Tools

From survey respondents; By alphabetical order



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Most Used Tools: Product and Design

Key Takeaways

Figma's Near-Universal Reach

- With 87% adoption, **Figma is effectively the de-facto standard for UI/UX and product design** - teams overwhelmingly stick with its real-time collaboration, component libraries, and plugin ecosystem rather than seeking out AI-specific design tools

Miro for Higher-Level Collaboration

- With 37% adoption, **Miro remains the go-to for wireframing, user-journey mapping, and cross-functional brainstorming**; its whiteboard-style interface complements Figma's pixel-perfect canvases, especially in early ideation phases

Rise of AI-Enabled Product Wireframes

- Design teams aren't yet feeling the urgent need for AI-native product/design platforms, however **many are using low/no-code solutions to Bolt, Lovable, and Vercel V0 for rapid protoyping**

Most Widely Used Tools

From survey respondents; By alphabetical order

bolt
Figma
lovable
miro
Motiff
PostHog
Vercel

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Internal Productivity Use Cases (Part 1 of 2)

Use Case	Key Trends
Sales Productivity	• Many teams are getting their AI-powered sales features straight out of Salesforce - indicating that an easy path is to **lean on your existing CRM's built-in recommendations, forecasting, and opportunity-scoring rather than bolt on a separate service** • Other respondents are also using **sales-engagement platforms** like Apollo, Salesloft, Gong, etc, while others are also leaning into **AI driven prospecting tools like Clay and People.ai** • As embedded capabilities mature, we will likely see **consolidation around a handful of platforms or clearer differentiation from the point-solution upstarts**
Marketing Automation & Content Generation	• Marketers overwhelmingly turn to **Canva's generative features for on-brand visuals and quick content iterations**, making it by far the most common "AI" touchpoint in the marketing stack • Many respondents are also using solutions like n8n or homegrown solutions, indicating that **marketing use cases sometimes require a high degree of in-house customization** • Many respondents are also using **specialized AI writing tools like Writer and Jasper, with adoption higher for later stage companies** ($100M+ revenue)
Customer Engagement	• Teams overwhelmingly rely on Zendesk or Salesforce's embedded AI features for customer interactions, signaling that **ease of plugging into existing ticketing and CRM workflows still beats adopting a standalone conversational AI platform** • A sizable minority lean on **specialist tools like Pylon, Forethought, Grano.la, or Intercom when they need deeper bot customizations, self-service wizards, or tight in-app support widgets** - suggesting that best-of-breed still has a role when out-of-the-box AI falls short
Documentation and Knowledge Retrieval	• Most teams either build on existing wikis and note-taking tools or standardize on Notion; this shows that organizations often **default to whatever's already in place for knowledge capture before experimenting with AI-powered overlays** • However, a sizable proportion of respondents are also leaning into **purpose-built AI tools like Glean and Writer for indexing and semantic search**

For more information on specific tools in each category, please reach out to ICONIQ Insights

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Internal Productivity Use Cases (Part 2 of 2)

For more information on specific tools in each category, please reach out to ICONIQ Insights

Use Case	Key Trends
IT & Security	• ServiceNow (used by 33% of respondents) and Snyk (used by 30% of respondents) lead the pack, showing that **large organizations are still defaulting to their existing ITSM and security-scanning platforms rather than standing up brand-new AI tools** • Zapier and Workato were also commonly mentioned, underlining how much teams **value low-code orchestration for stitching together alerts, ticket creation, and remediation scripts across disparate tools**
Legal	• Legal departments are **dipping toes into AI primarily through ChatGPT and ad hoc scripts, but purpose-built legal assistant platforms are starting to gain traction** • As regulation and security concerns mount, we'll likely see a bifurcation: **mainstream LLMs for informal research and compliance-focused suites for mission-critical contract workflows**
HR & Recruiting	• Nearly half of teams rely on LinkedIn's built-in AI features - profile suggestions, candidate matching, and outreach sequencing - underscoring that **recruiters lean on platforms they already use daily rather than integrating standalone solutions** • However, niche platforms like HireVue for AI-driven video interviews and Mercor for candidate engagement are starting to see modest uptake
FP&A Automation	• Many teams are using **Ramp for FP&A automation, likely leveraging its spend management and data sync features in an all-in-one platform** • Specialized suites like Pigment, Basis, and Tabs are also starting to pick up traction, showing **growing interest in driver-based planning and multi-scenario modeling platforms** • **Around one-third of respondents are also using homegrown solutions**, reflecting investment in custom scripts, Excel macros, and bespoke pipelines to glue together ERP, billing, and BI systems

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