
2025 Cloud and Generative AI Survey

Global Study 2025



TD Cowen
a division of TD Securities

The 2025 Cloud and Generative AI Survey provides a view of spending outlook and trends in cloud and gen AI across a range of firm types and sizes

Survey Description

Background	This survey is the 12th iteration of a survey we've run from 2015 to 2025 This survey covers: • Trends in cloud computing • Public cloud and on-prem migration • Public cloud sales coverage • AI adoption and usage • Gen AI use cases by function
Target Audience	• IT and cloud services buyers / decision-makers
Screening Criteria	• More than 10 employees • \$10k+ annual IT budget • Involved in IT purchasing decisions and gen AI adoption • Full time employment status • Familiar with at least 1 cloud service provider
Sample Size	• 501 distributed across business size and industry • 215 North America; 174 Europe; 112 APAC

Respondent Detail

Release Date (<i>Full Launch</i>)	06/10/2025
Completion Date	06/27/2025
# of Completes	507
# Qualified	501
% Disqualified	1.2%
Median Completion Time (<i>min</i>)	23.8

Firmographics

- Roughly similar distribution across firm sizes
- ~31% SMB, ~29% Mid-Market, 40% Enterprise¹

Changes for 2025 Survey

- Combined survey on cloud services and gen AI

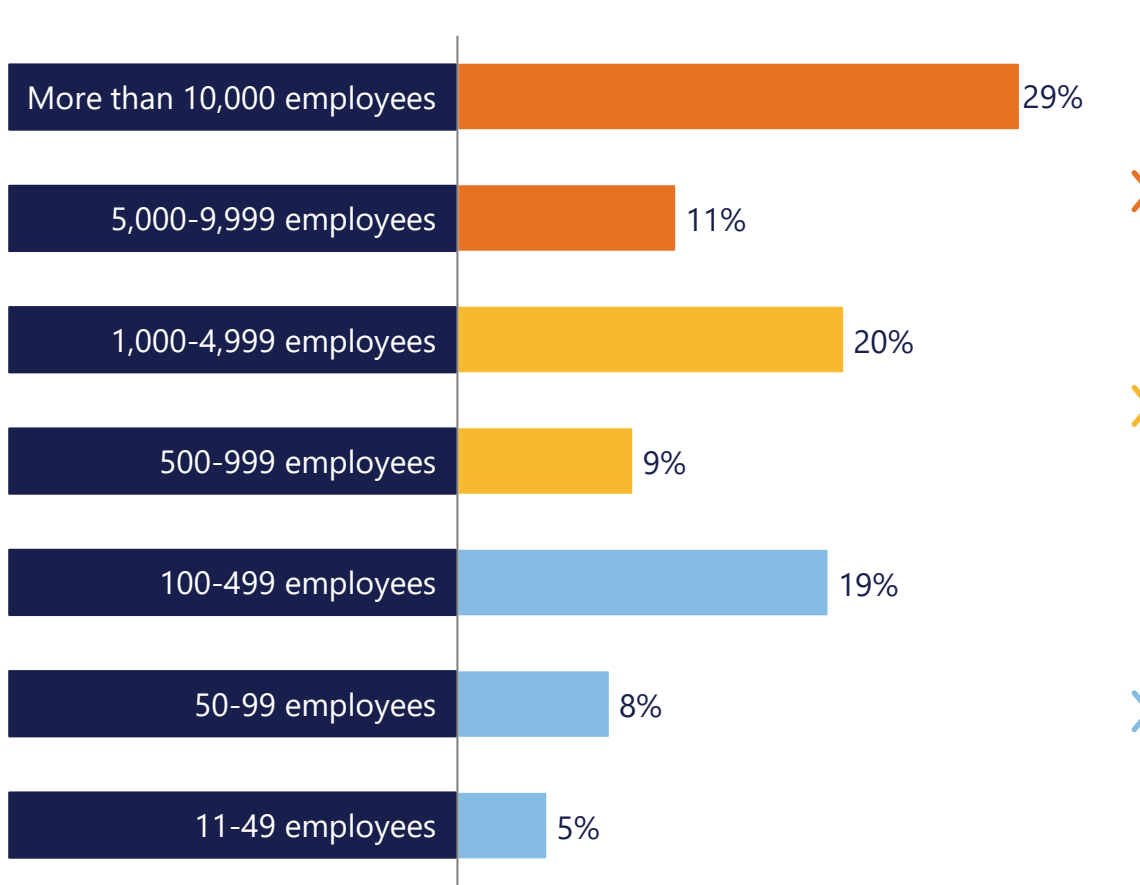
Example Position Titles Surveyed

Vice President of Information Technology
Chief Information Officer
Chief Technology Officer
Head of Digital

Notes: 1) Size defined by # of employees: Enterprise >5,000, Mid-Market 500-4999, and SMB <500

We sampled a roughly equal distribution of IT decision makers across different company sizes

Company Size Distribution (% of total sample)



Firm Revenue and IT Budget

	Median Firm Revenue	Median IT Budget	% IT Budget Relative to Revenue (implied)
Enterprise ~40% of sample	Greater than or equal to \$1b	Greater than or equal to \$50m	2%
Mid-Market ~29% of sample	\$100m to \$499m	\$5m to \$24m	5%
SMB ~31% of sample	\$10m to \$99m	\$500k to \$999k	1%

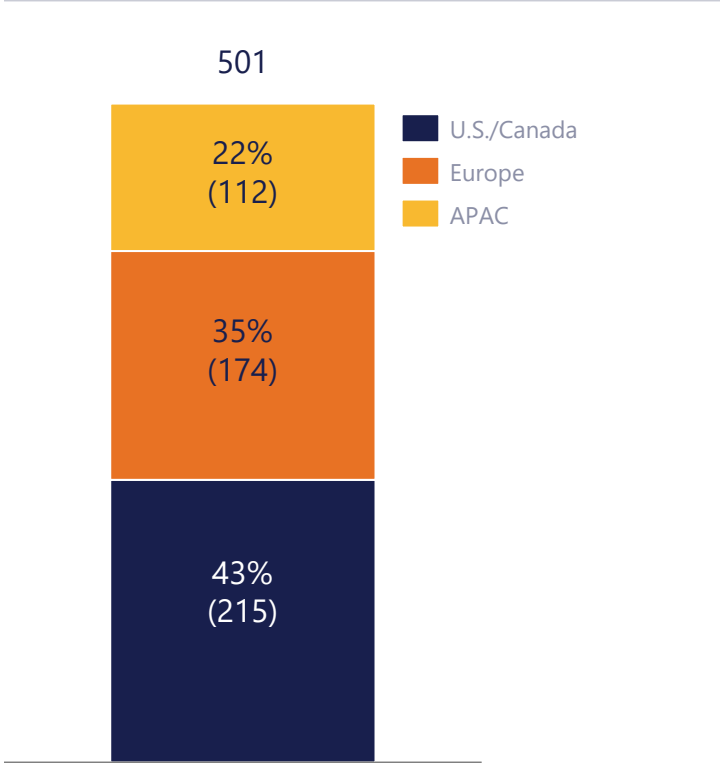
Notes: 1) Size defined by # of employees: Enterprise >5,000, Mid-Market 500-4999, and SMB <500; Source: 2025 Altman Solon Cloud and Gen AI Survey

We received responses from 501 decisionmakers across a range of geographies, business sizes, and industries

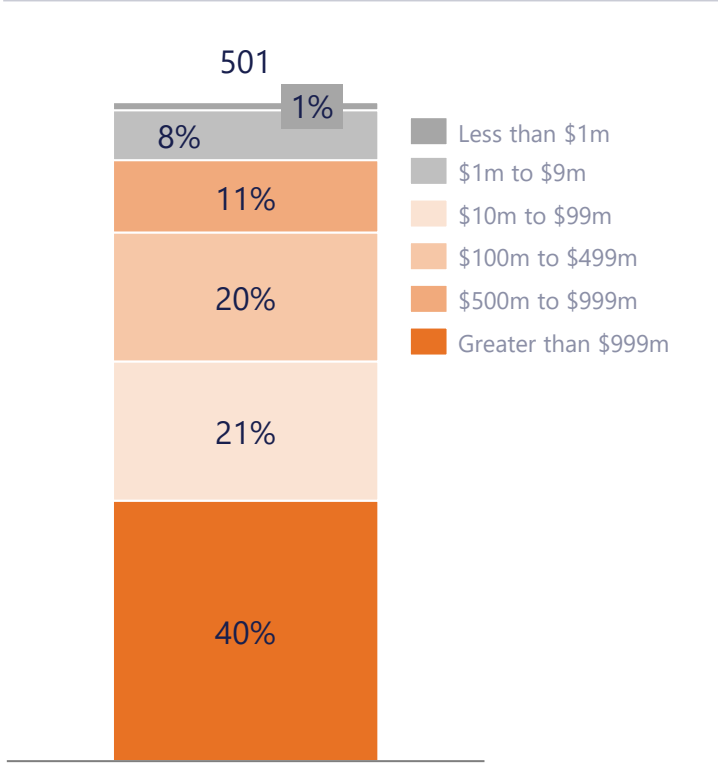
Survey Response Demographics

2025

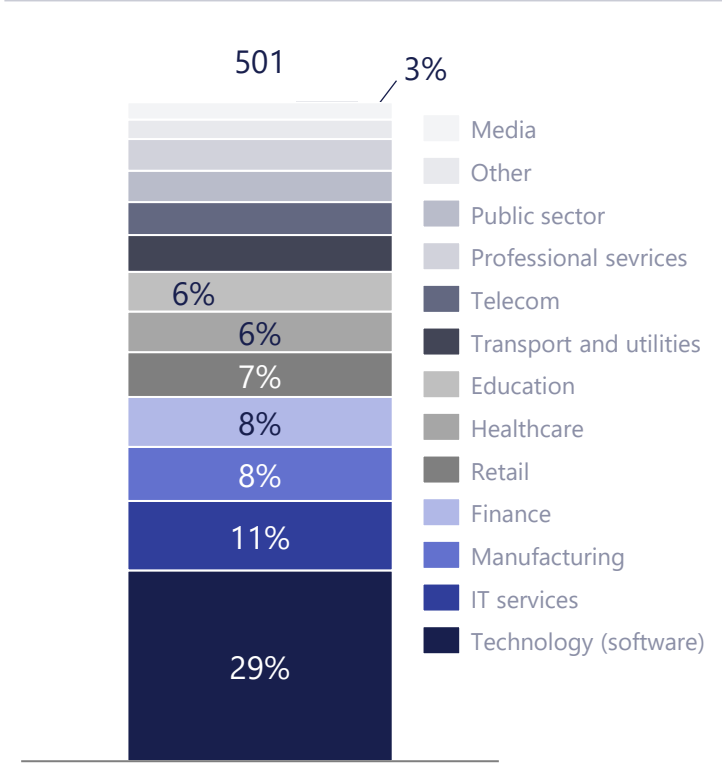
Responses by Region



Responses by Business Revenue



Responses by Business Vertical

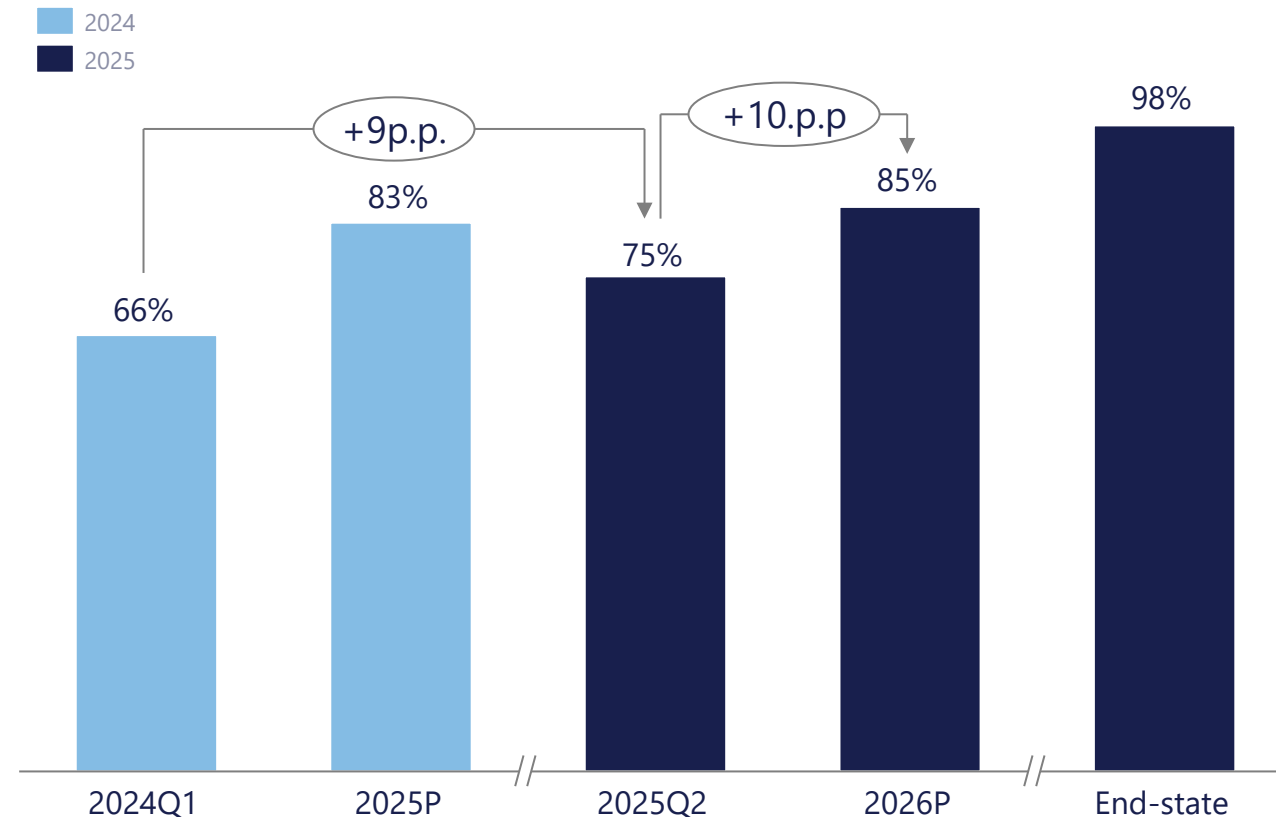


Sources: 2025 Altman Solon Cloud and Gen AI Survey

Use of gen AI tools has increased +9pp vs 2024 with 75% of respondents currently using gen AI tools, though adoption has been lower than expected

Current and Projected Enterprise Adoption of Gen AI Tools, 2024'Q1 – 2026P

U.S., 2024 n = 167; 2025 n = 215



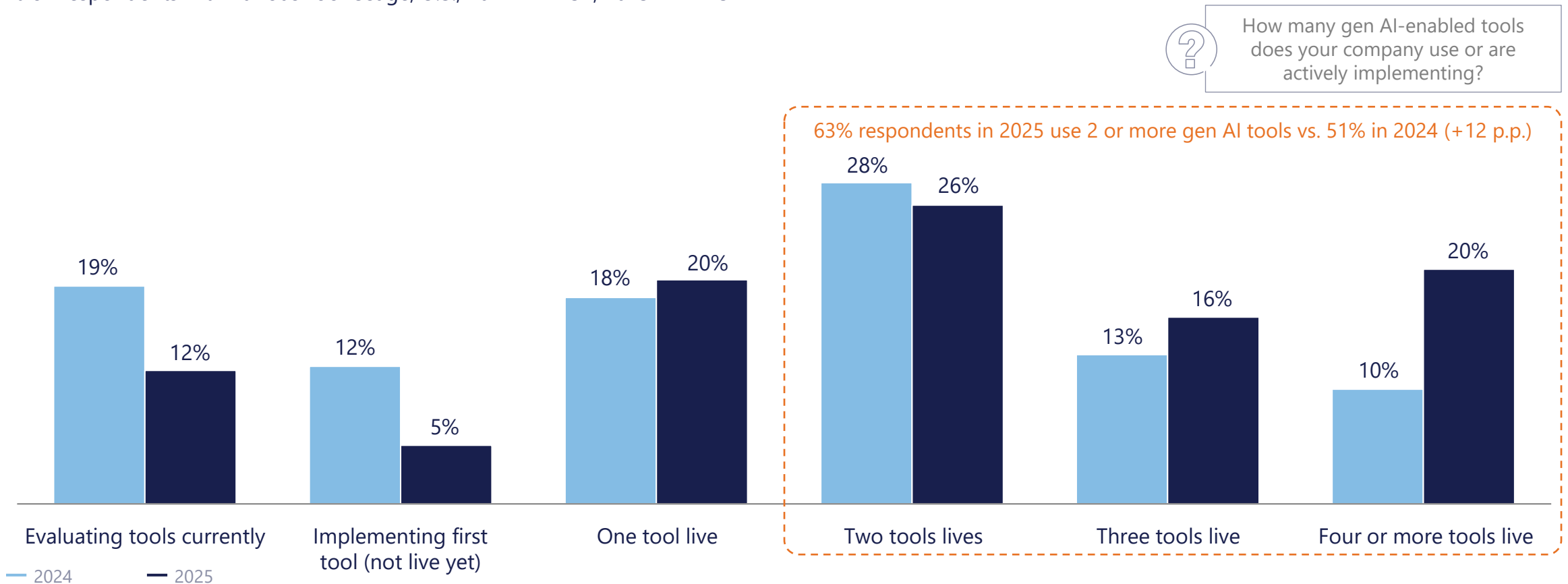
- 75% of surveyed respondents indicated that they currently use gen AI tools, up from 66% in '24
- A further 10% indicated that they have evaluated and planning to use tools
- Majority of the remaining respondents (11% of the total group surveyed) indicated that they are actively evaluating or planning to evaluate new tools
- Fewer than <2% of respondents plan not to use or not to evaluate gen AI tools, suggestive of a 98% end-state adoption (4 U.S. respondents said they do not plan to evaluate/use gen AI)
- However, 2024 survey suggested adoption in 2025 of 83% vs 75% recorded in 2025 survey, indicating it is taking longer implement tools expected by respondents

Sources: 2025 Altman Solon Cloud and Gen AI Survey, Altman Solon Gen AI Survey 2024

63% of respondents are now using 2+ gen AI tools, up from 51% in 2024, with largest growth in respondents using 4+ tools doubling to 20%

Number of Gen AI Tools Used in 2024 vs. 2025

% of Respondents with Various Tool Usage, U.S., 2024 n = 257, 2025 n = 215

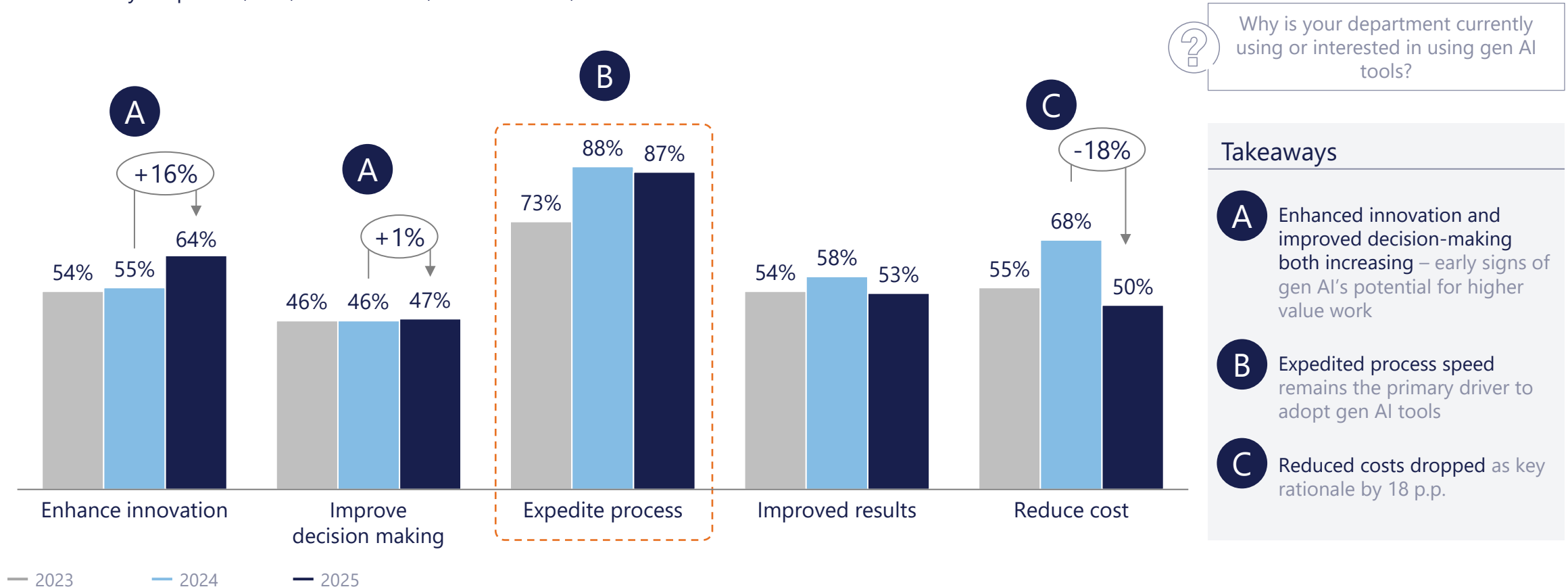


Sources: 2025 Altman Solon Cloud and Gen AI Survey, Altman Solon Gen AI Survey 2024

Cost reduction rationale for adoption fell significantly (-18 p.p.); expediting processes remains the key reason cited for adoption (by 87% of respondents)

Key Risks of Gen AI Adoption in 2023-25

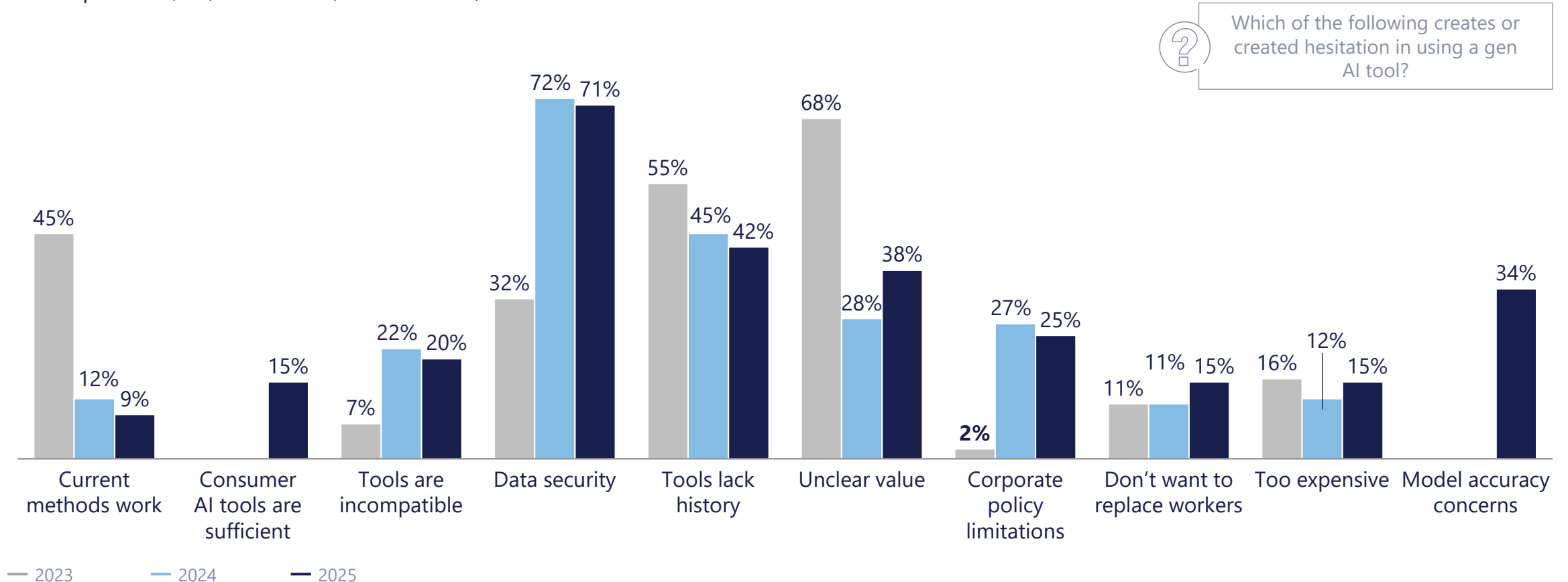
Global Survey Responses, U.S., 2023 n = 244, 2024 n = 257, 2025 n = 215



Significant concerns to adoption are data security (71%), gen AI value (38%) and model accuracy (34%); respondents cited less tool history concerns (-3 p.p.)

Key Risks of Gen AI Adoption in 2023-25

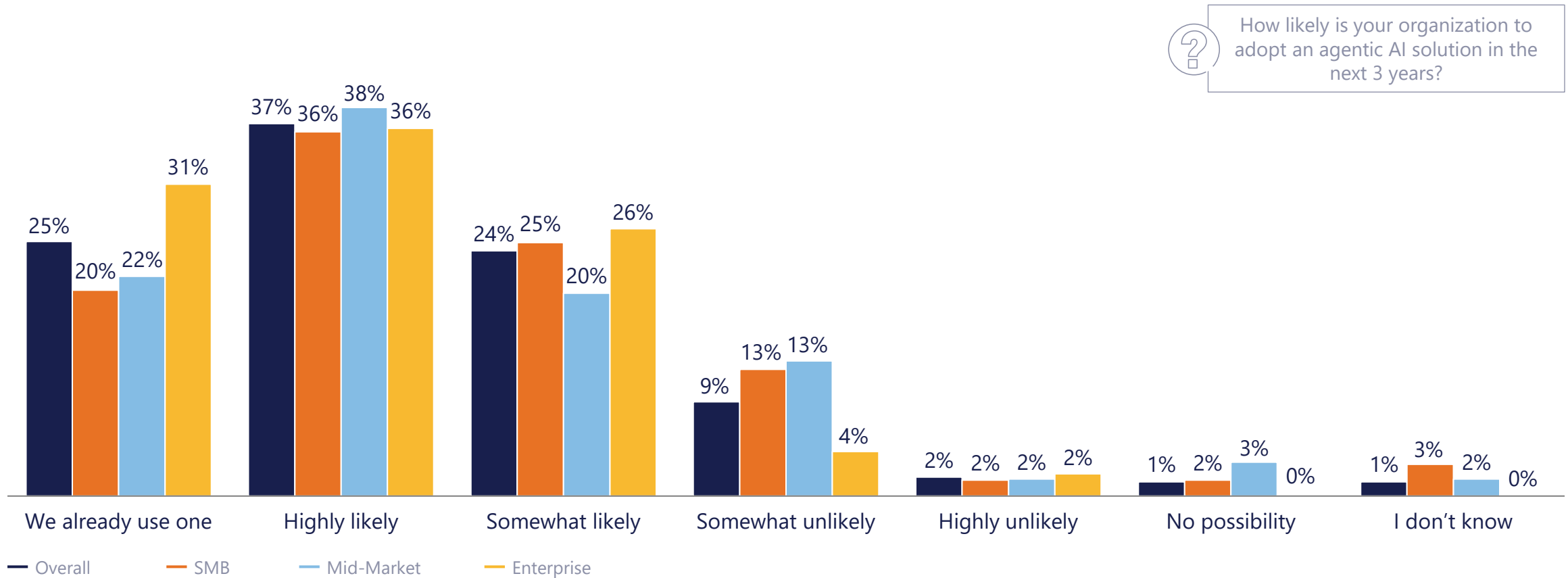
% of respondents, US, 2023 n = 44, 2024 n = 257, 2025 n = 215



25% of respondents already use agentic AI and 37% are highly likely to use agentic AI in the next three years; enterprise respondents lead current use (31%)

Usage of Agentic AI Solutions in Next 3 Years

% of respondents by company size, U.S., n = 215

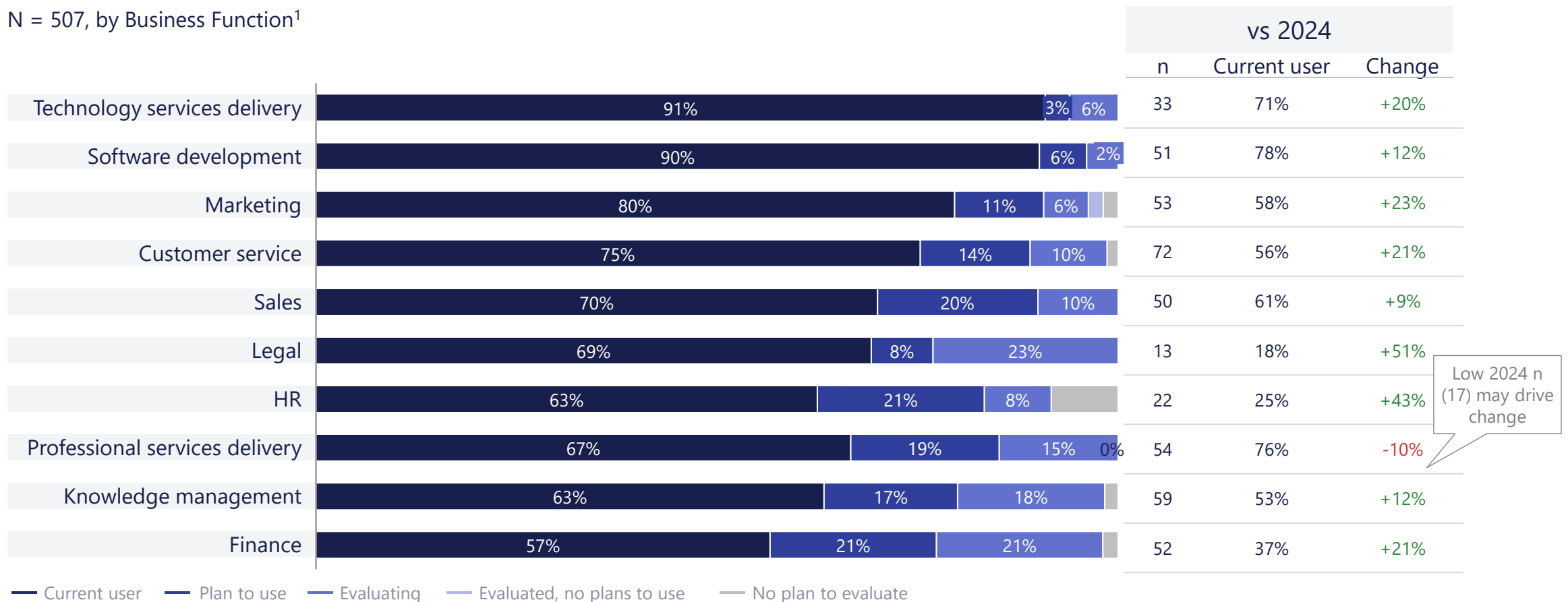


Sources: 2025 Altman Solon Cloud and Gen AI Survey

Nearly all functions show an increase in gen AI adoption vs 2024, with large rises in customer service (+21%) and back-office functions (marketing, sales, legal, HR)

Gen AI Adoption and Likely Adoption Over Time

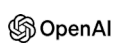
N = 507, by Business Function¹



Source: 2025 Altman Solon Cloud and Gen AI Survey,

Product development, software development, and technology services delivery remain the top functions with high current adoption

Enterprise Gen AI Adoption by Function

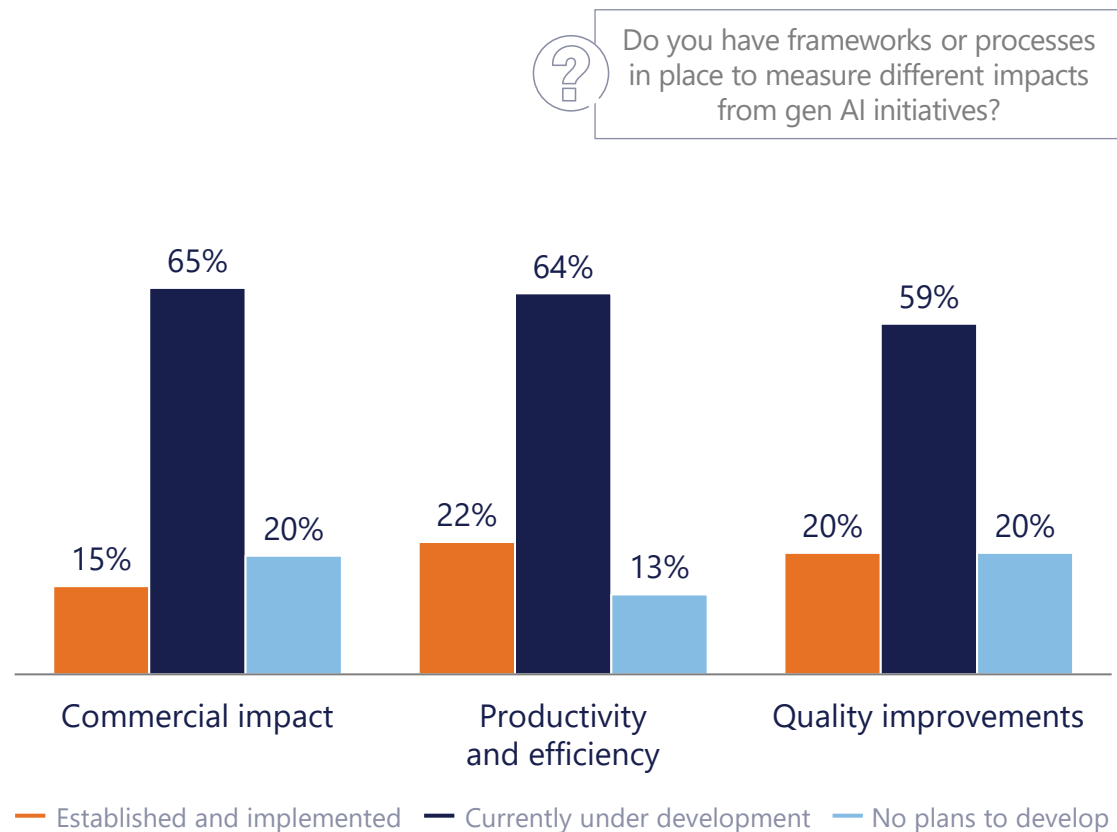
Functions	Most impactful use case surveyed	Sample products	2023 adoption %	2024 adoption %	2025 adoption %
Technology services delivery	Improved capability of software development and AI product implementation teams	 		 71%	 91%
Software development	Code generation & completion	 	 22%	 78%	 90%
Marketing	Customized copy generation	  	 22%	 58%	 80%
Customer service	Self service, automated customer support through agentic AI	 	 11%	 56%	 75%
Sales	Personalized summaries of customer interactions, history, and status		 8%	 61%	 70%
Legal	Drafting or summarizing contracts	 	0%	 18%	 69%
HR	Automation of basic HR tasks	  		 25%	 63%
Professional services delivery	Draft communications	 		 76%	 67%
Knowledge management	Summarize and classify internal and external documents	 		 53%	 63%
Finance	Summarize historical financial performance	  		 37%	 57%

Sources: 2025 Altman Solon Cloud and Gen AI Survey, Altman Solon Gen AI Survey 2024, Altman Solon Gen AI Survey 2023

91% of respondents believe gen AI is having productivity and efficiency benefits, though only 45% are confident gen AI is having a commercial impact

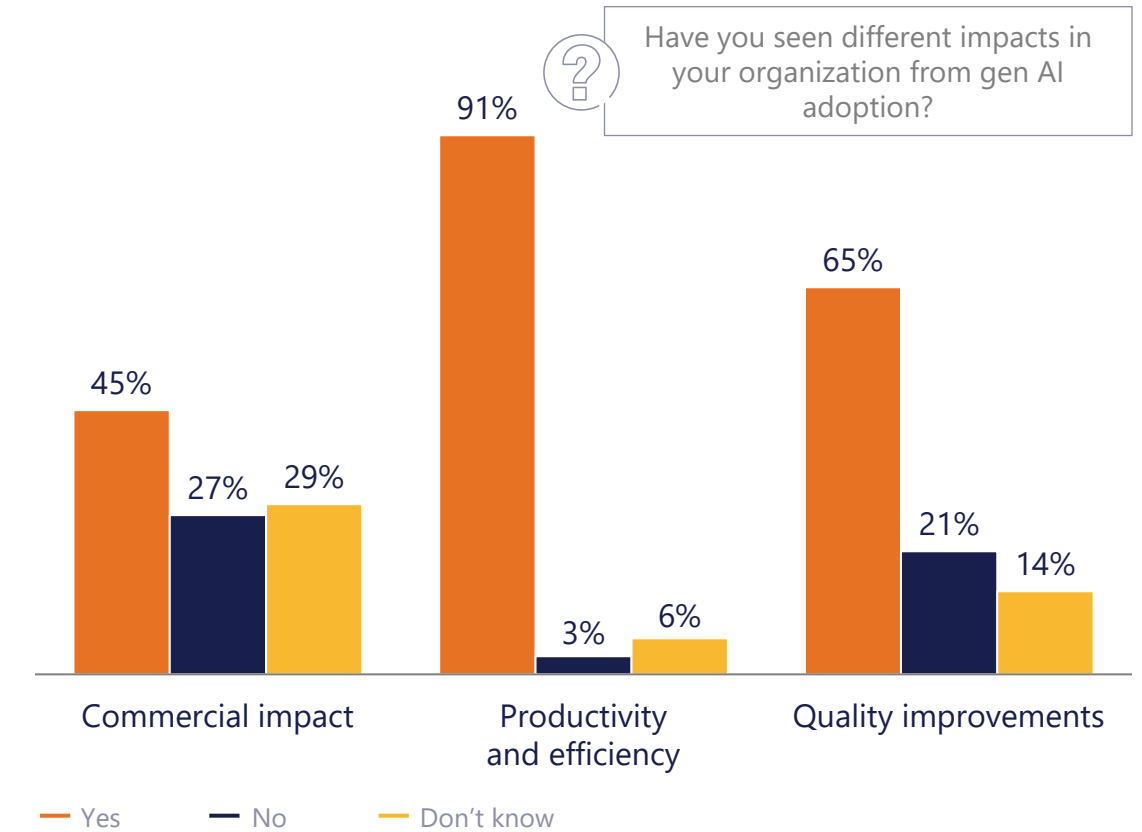
Frameworks to Measure Impact of Gen AI Initiatives

By % of respondents; U.S., n = 215, 2025



Impact of Gen AI initiatives

By % of respondents; U.S., n = 164, 2025



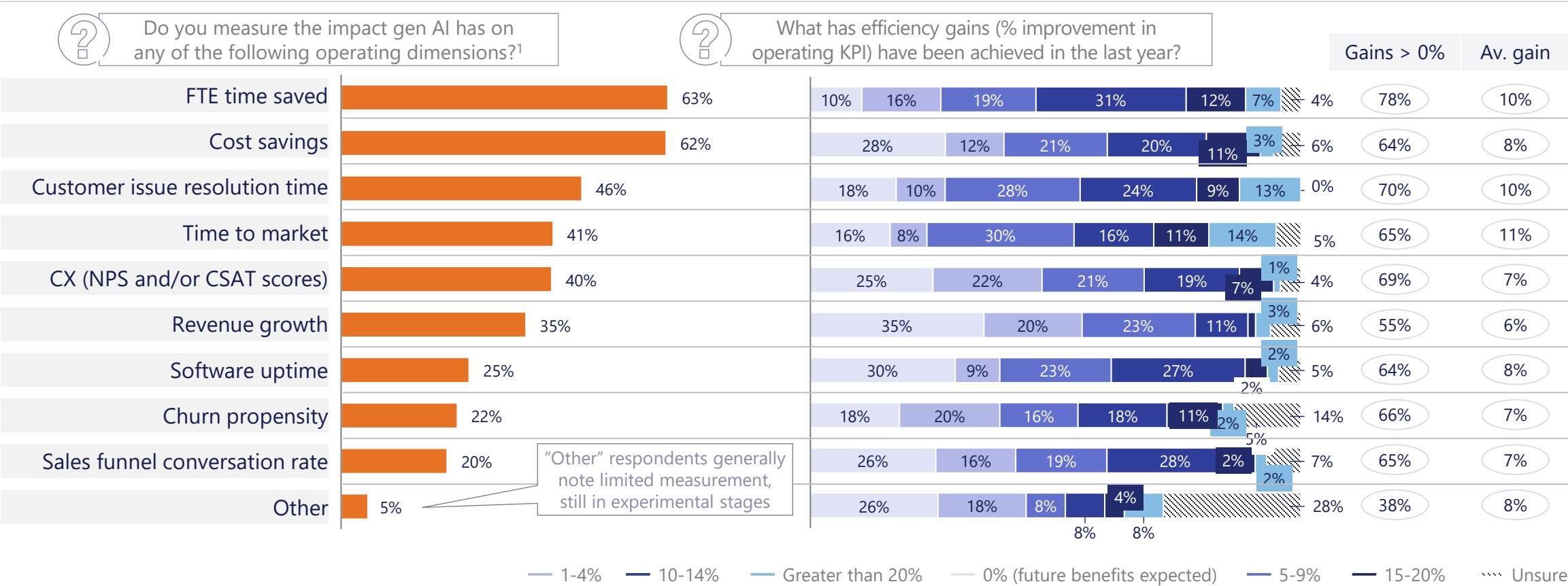
Sources: 2025 Altman Solon Cloud and Gen AI Survey

Enterprises are primarily measuring gen AI impacts on FTE productivity, operating costs, and customer service efficiency; est. improvements to date are material

 New 2025 question

Gen AI Impact Measurement by Operating KPI

By % of respondents; U.S., n = 171 - 195 (depending on dimension), 2025



1.) Question was only asked of respondents who had already indicated they measure or are beginning to measure impact of gen AI. Sources: 2025 Altman Solon Cloud and Gen AI Survey