

THE AI ADOPTION JOURNEY:

How the user journey with AI can inform your product roadmap

PART 1:

AI at Home





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AI AT HOME: PERSONAL AI ADOPTION IN FIVE GLOBAL MARKETS

Executive Summary

This paper explores the **adoption and integration of AI technology in the personal lives** of users across five major global markets—United States, Brazil, India, France, and the Philippines—highlighting a significant shift from curiosity to daily usage. Notably, **India leads in personal AI tool adoption while France remains more cautious.** Users universally find AI extremely helpful and

are **engaging with AI to save time and learn new things.** The challenges of 'Correction Tax' and culturally sensitive AI product design emerge as critical areas for development. By considering market-specific attitudes and innovating beyond AI's cognitive support roles, companies can strategically position themselves for success in the increasingly AI-driven global landscape.



AI Adoption is Moving from Curiosity to Commonplace

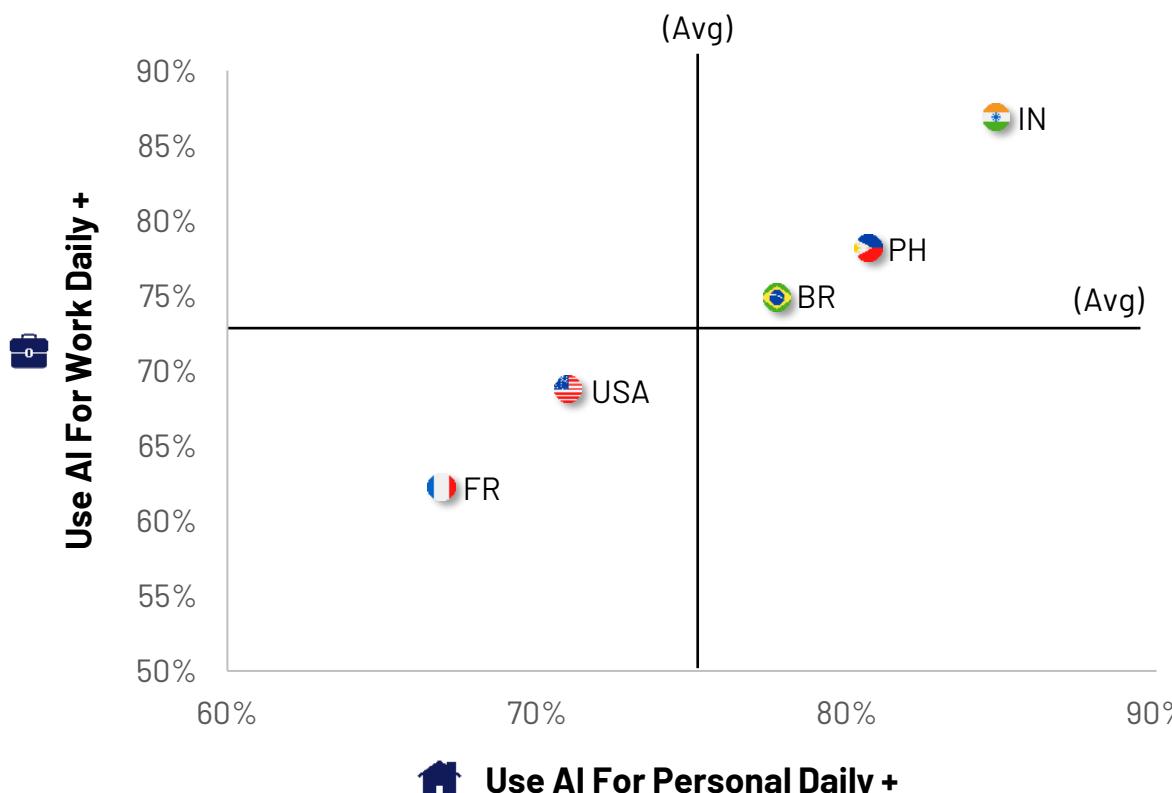


Figure 1. The usage of AI for personal tasks and work tasks in the five markets surveyed.

Based on data from 819 users across five key markets (United States, Brazil, India, France, and the Philippines), we have clearly passed the tipping point of curiosity in AI. For much of the global population, AI is now a practical, frequently used tool.

Usage rates are not hard to understand as an overwhelmingly majority of users in all markets tell us that they find AI helpful and over 90% in every country see AI positively.

AI delivers value by saving users time and helping them learn new things. And it's not just Large Language Models (LLMs), as users are

also using chat bots, grammar and writing assistance tools to simplify and accelerate everyday tasks.

The top tasks across all markets included:

- Research topics and summarizing information
- Writing or editing text
- Brainstorming and creating new ideas

Users aren't waiting on the sidelines. They are making behavioral changes right now to save time and learn and explore new things.



I use it almost every day for my studies. It's an essential tool now. Instead of spending hours reading long academic papers, I can get a summary of the key points in seconds. The amount of time it saves me is why I find it so helpful." PPHLO12

AI Tasks For Personal

Showing average across markets

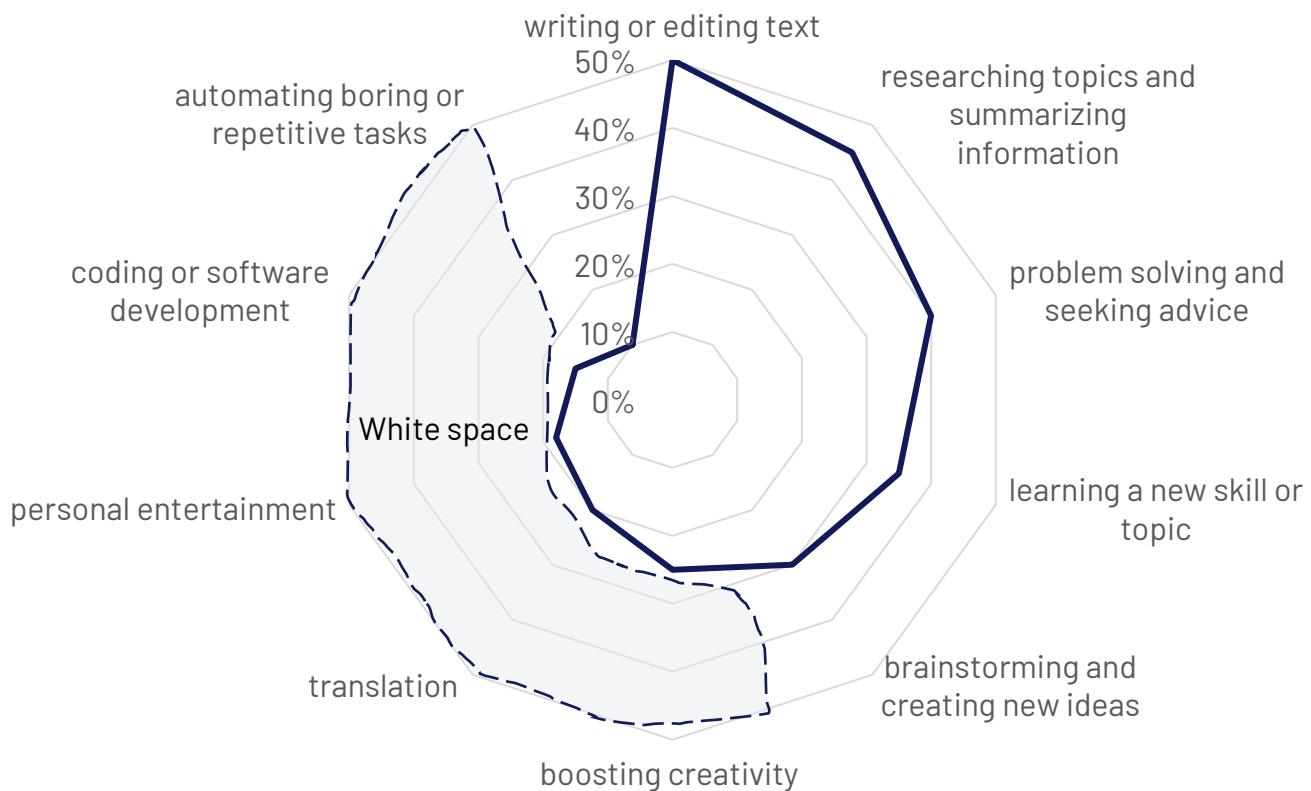


Figure 2. The most common tasks people are using AI for in their personal lives with plenty of whitespace use cases still available to for businesses to address.

Patterns of personal use

Looking across personal tasks, AI serves as cognitive enhancement: an assistive technology that boosts human capabilities in understanding, ideation, and decision-making. Specifically, the most prominent personal tasks are to optimize efficiency, creativity and learning by providing data-driven insights and quick access to information.

By contrast there's a real white space for personal entertainment implying today's user sees AI for its functional rather than emotional benefits.



Honestly, I'd never really thought to use AI for something complex like planning a project timeline or even our family vacation itinerary. I always just defaulted to a spreadsheet, which took ages. It wasn't until a colleague showed me how an AI could draft a whole schedule in a minute that I realized what I was missing. **PUSA112**

AI User Segments by Market

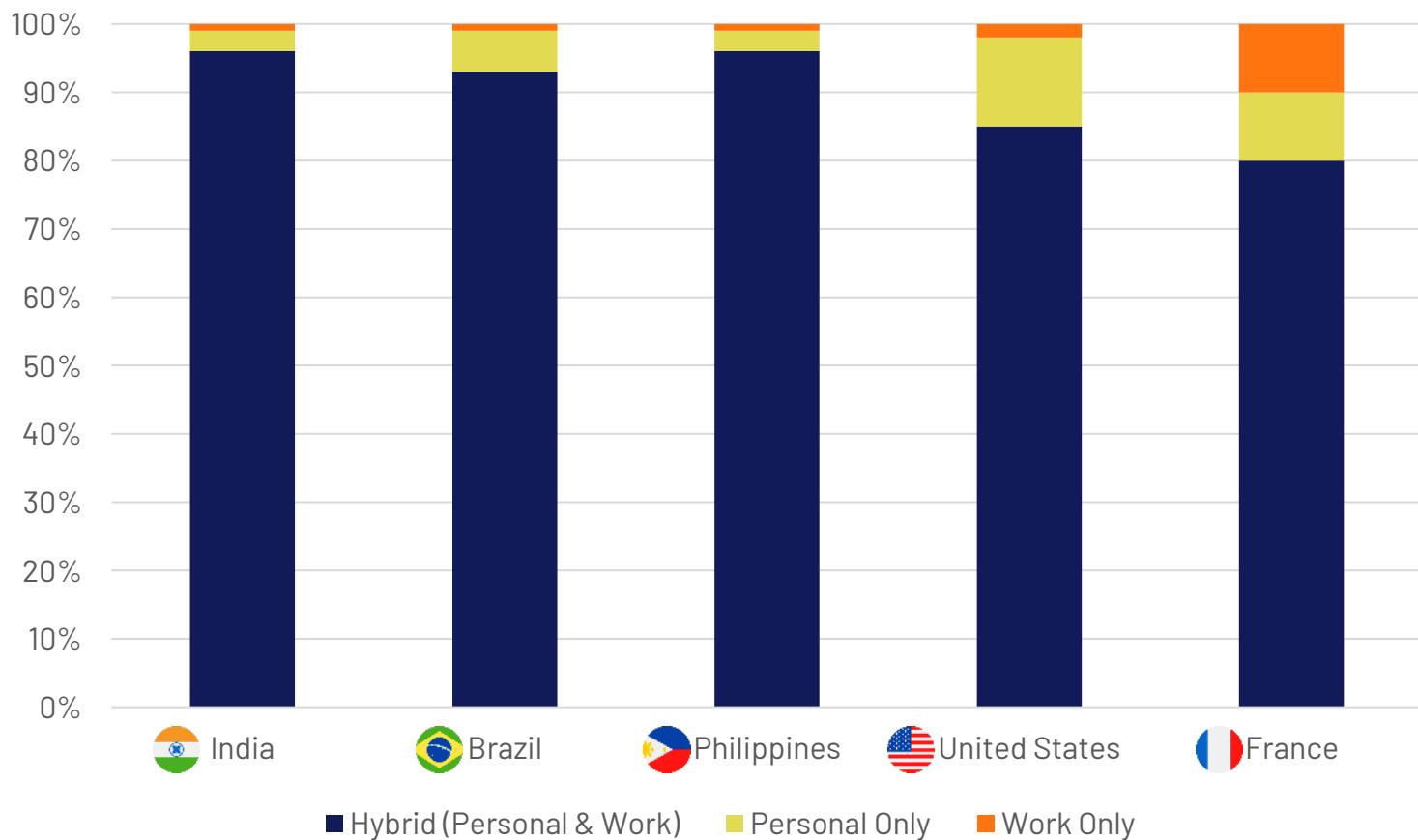


Figure 3. Percent of users using AI for personal, work and hybrid tasks in the surveyed markets.

The "Gateway" Effect of Personal Use

The data provides compelling evidence of a universal adoption pattern where personal experimentation with AI tools almost invariably precedes and enables professional integration.

The near-total absence of "work-only" user segments in all markets except France indicates that professional AI adoption is not a top-down, corporate-led phenomenon but a bottom-up movement driven by individuals who first master AI on their own time and then import those skills and workflows into the workplace.

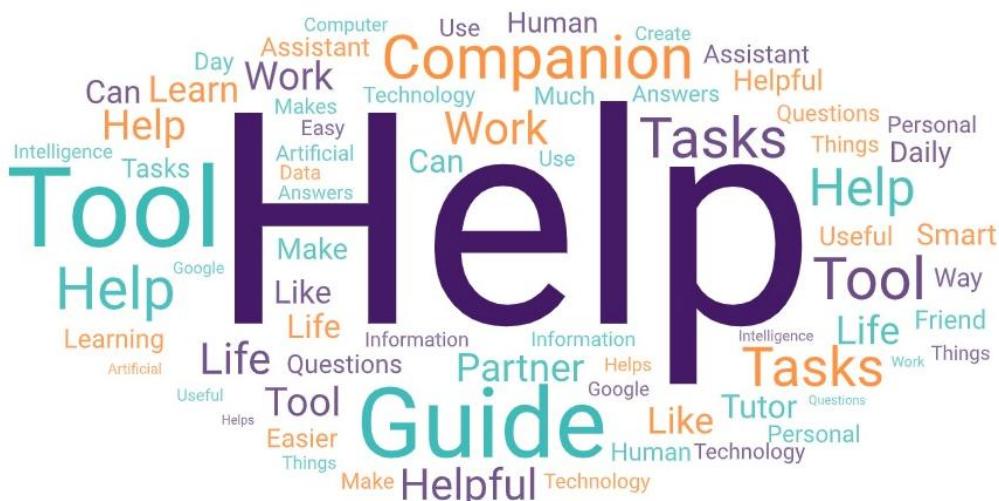
The data also shows that most people using AI at work are using free versions or paying for AI tools themselves rather than receiving access to AI tools from their employers. This also points to the likelihood that people have tried AI out for personal use first and then brought it into their work activities once they understand how to use it and the efficiencies they gain using it.



*It began with personal curiosity—asking it to plan a trip or summarize a news article. Once I saw how good it was at organizing information, I started using the free version for my work notes. It made me so much more efficient that I eventually started paying for it myself. My job doesn't provide it, but I brought it into my workflow because I saw the value at home first. **PBRO33***

Five Markets, Five Ways to Use AI

Figure 4. How users in India, Brazil and the Philippines would describe AI to friends and family.



While the "why" is universal, the "how" and "how much" people engage with AI differs by markets. The key to creating successful AI-enabled products and services needs to factor these nuances into go-to-market strategy.

  Enthusiasm in India & Brazil

India is the super-user market, leading the markets in personal AI adoption with the majority of people surveyed using it daily or several times a week. Both Indian and Brazilian users have a deeper, more emotional connection with the technology, often describing AI in relational terms like a "friend" or "companion".

- To succeed in India and Brazil, AI products need to express more personality, provide proactive assistance, and communicate with a greater depth of

emotional recognition and response.

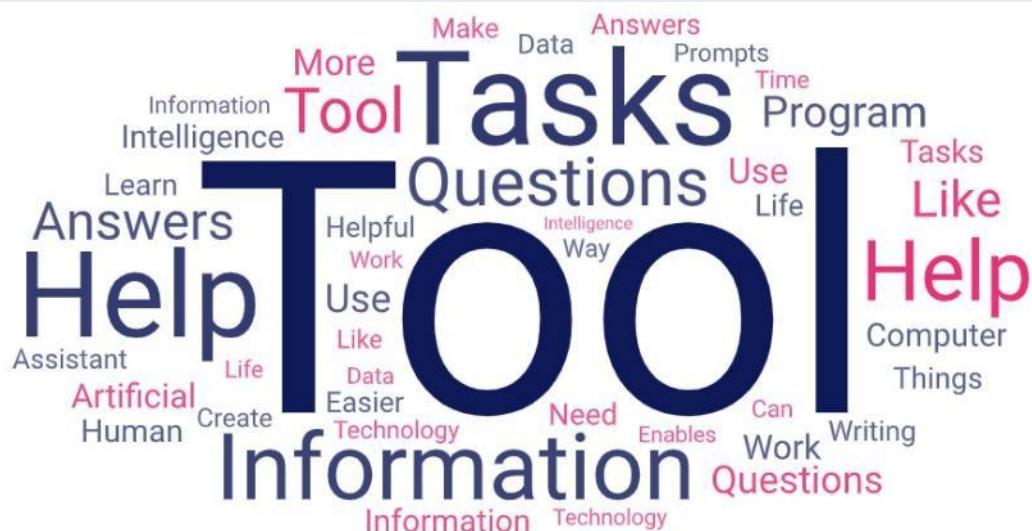
 Moderation in the Philippines

While users in the Philippines are high adopters of AI, with 80.3% using it daily or weekly for personal tasks, their enthusiasm is grounded in moderation. Their primary concerns, "Putting too much trust in AI" and "Loss of human skills", highlight a user base that embraces AI as a powerful assistant but is keenly aware of the need for human oversight.

- To succeed in the Philippines, AI products should focus on empowerment, offering users robust tools for control, customization, and easy correction, rather than a fully automated experience.

Five Markets, Five Ways to Use AI

Figure 5. How users in the U.S. and France would describe AI to friends and family.





Pragmatism in The United States

US users are familiar with AI (93% feel familiar with AI) and frequent users, but they are more measured in their embrace of AI and are more focused on the practical side of what AI can deliver. They see AI as a powerful search engine or an advanced tool, as well as an error-prone content creator that needs oversight and guidance. Their primary concerns are related to privacy and the spread of misinformation.

- To succeed in the US, AI products must go beyond the core capabilities to also provide the user with transparency, reliability, security and user control. .

Skepticism in France

France appears to be the most cautious market of the five we surveyed. They report the lowest frequency of personal use (65.7% daily/weekly) and are the most likely to stick to free versions of tools (62.7%) rather than paying for upgrades and more advanced features. Their concerns are more societal and philosophical, focusing on the loss of human skills and putting too much trust in AI.

- To succeed in France, AI products should provide transparency and user control along with responsible and ethical AI that is built to augment human intelligence, not replace it.

My concern is more philosophical: if we become too dependent on AI, we risk losing our critical thinking skills. It is essential that these tools are built to assist, not to replace, human judgment. I need to feel that I am in control and that it is simply augmenting my own intelligence." **PFR011**

The Biggest Challenge: The Correction Tax



Despite their general optimism, users recognize AI's flaws. They know that AI hallucinates and provides incorrect answers to questions. As a result, a significant number of users report needing to edit AI output "Always" or "Often," which makes them less efficient. This is most prominent in the Philippines (58.5%) and India (50.6%).



The main challenge is the choice of your words, or prompt, to ask the AI to perform a task. Over time, this improvement in words gets better, thus obtaining more precise and accurate results. **PBR023**

Solving for the “Correction Tax”

The problem of time wasted correcting AI outputs and engineering better prompts points to a need to improve the core AI offer. Right now, the dominant model for AI usage is free, not paid, premium versions. So, the “tax” is on people’s time and not their wallet.

To get more people to pay for AI tools, the time spent fixing prompts and AI outputs needs to be reduced. For prompt engineering, the rise of Agentic AI offers promise by allowing users to select the agent that best fits their needs, without having to provide additional instructions. User fact checking can be simplified by providing citations and links to credible sources or by sharing the reasoning behind the answers AI provides.

For me, the biggest challenge is trust. You can't always be sure the information is correct because sometimes AI tools just make things up (which is also known as Hallucinations)... So, you still have to fact check everything." **PIN100**

Users factor in the time it takes them to review and correct the AI output as a trade-off for the efficiencies they gain from AI's computing power and speed. Many AI users also complain that prompt engineering is difficult and time-consuming, which adds to the need for users to correct the AI tool repeatedly before they are satisfied with the outputs.

Key Opportunity: Localizing AI for Market Nuances



As with any product, we must remember that cultural differences matter for design. While users can train their AI tools to deliver more contextually accurate outputs, products that address those needs seamlessly for users will accelerate adoption and increase engagement. Cultural considerations also influence how AI should be positioned in the different markets. When asked how AI will impact society in the future, themes emerge that can help frame each market's expectations and opportunities.

India

For India, AI is a positive force as evidenced by their frequent usage and high ratings for helpfulness. That positivity goes beyond the individual and extends to a widespread perception that AI can drive beneficial

outcomes for society at large. Many feel that AI can increase efficiency and competition to bring India more prosperity and economic progress.



I strongly abide by it... More success and development in our society is always a good thing. **PIN006**

That may open the door for greater adoption in civic life and acceptance of AI solutions for citizen services. At the same time, Indians are concerned that AI could lead to massive job loss through automation, so the trade-offs will be important to address.

 **Brazil**

Brazilians voice similar ideas about how pervasive AI will be in the future. One person noted:

 *...I believe it is the new reality, like when we started using GPS... I believe it will be the same with AI." PBR019*

While Brazilians may feel a certain inevitability about the expanding use of AI, they also believe that growth in AI will bring democratization of knowledge. By providing widespread access to information and new capabilities, it brings new opportunities for individuals to learn and experience new things. Introducing learning opportunities and skills building with AI solutions aligns well with these expectations.

 **U.S.**

In the U.S., users are cautiously optimistic while being realistic about the impacts of AI on job displacement and privacy. They also worry about overreliance on AI and the loss of artistic and cultural skills or replacement of humans in those spaces. For these reasons, AI in the US will need to continue to focus on how the technology augments human knowledge and skills without replacing them. Showing how AI can boost creativity and help preserve artistic talents can keep fears at bay while showing the vast capabilities of Generative AI.

 **France**

The French have concerns about how AI will impact the creativity and skills of younger generations who may become too reliant on the technology instead of their own intelligence.



This use without limits or control pushes the new generations to an abusive use of AI to the detriment of their capacity for reflection." PFR080

They seek more regulation and supervision of AI in hopes of avoiding the dangers of misinformation and unethical use of AI. By providing transparency and more control over the ways AI is used and monitored, products can reduce the anxiety of the users in France and drive more adoption.

 **Philippines**

Finally, in the Philippines, a fear of improper use and scammers is offset by the usefulness of AI in their daily lives and in society. They emphasize a need for moderation and balance in the use of AI with a focus on the positive benefits of efficiency and productivity. AI can be positioned as an "aid and not an alternative" to human knowledge so that Filipinos can focus on the value AI adds and not the downside.

For AI tools to be successful, they need to be designed and positioned in a way that resonates with the cultural and market realities of different countries and regions. Understanding the different levels of optimism and worry, the possibilities and barriers, and the way different global markets respond to the growth of AI in society helps frame up a global strategy for new AI products.



Of course, you worry about scammers and the spread of fake information, especially for the older generation. But if we have proper guidelines and learn to use it correctly, it's so helpful for daily tasks. It's all about finding the right balance." PHL018

Key Takeaways

01

AI has become a mainstream global tool. Now is the time to focus on delivering tangible value and a seamless experience rather than simply showcasing the technology.

02

The common use of AI for cognitive tasks leaves space to innovate for other use cases. Explore and prototype AI applications for creative ideation, emotional support tools, or even AI-assisted physical tasks.

03

Personal use is the gateway to professional adoption. Try to design your workplace solutions with the same intuitive and easy-to-use consumer interfaces.

04

Global markets have distinct user attitudes and sentiments about AI. Adapt your product's messaging, onboarding, and even the AI's tone to align with local sentiments.

05

The biggest barrier to deeper engagement is the "Correction Tax". Make reducing the user's effort to fix AI outputs a top priority with better models and more user controls.

06

Attention to cultural and market differences can help you create winning AI-enabled products. Aim to have diverse teams working on your AI offers to provide a richer, more culturally aware experience.

Technical Note:

Research is based upon an online survey of 819 consumers sourced from online panels in 5 markets: USA, France, Brazil, Philippines and India with fieldwork undertaken in September 2025.

Sample sizes per market: USA: 222, France:134, Brazil: 147, Philippines: 142 and India: 174

THANK YOU

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