

Close your eyes and picture a world where Al becomes so foundational to society that..

People would be open to having AI as a friend

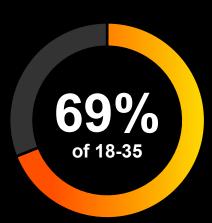
Or even...

having an Al as a girlfriend or boyfriend?

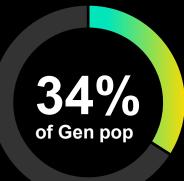
**KANTAR** 

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# Now open your eyes... it might be closer than it sounds

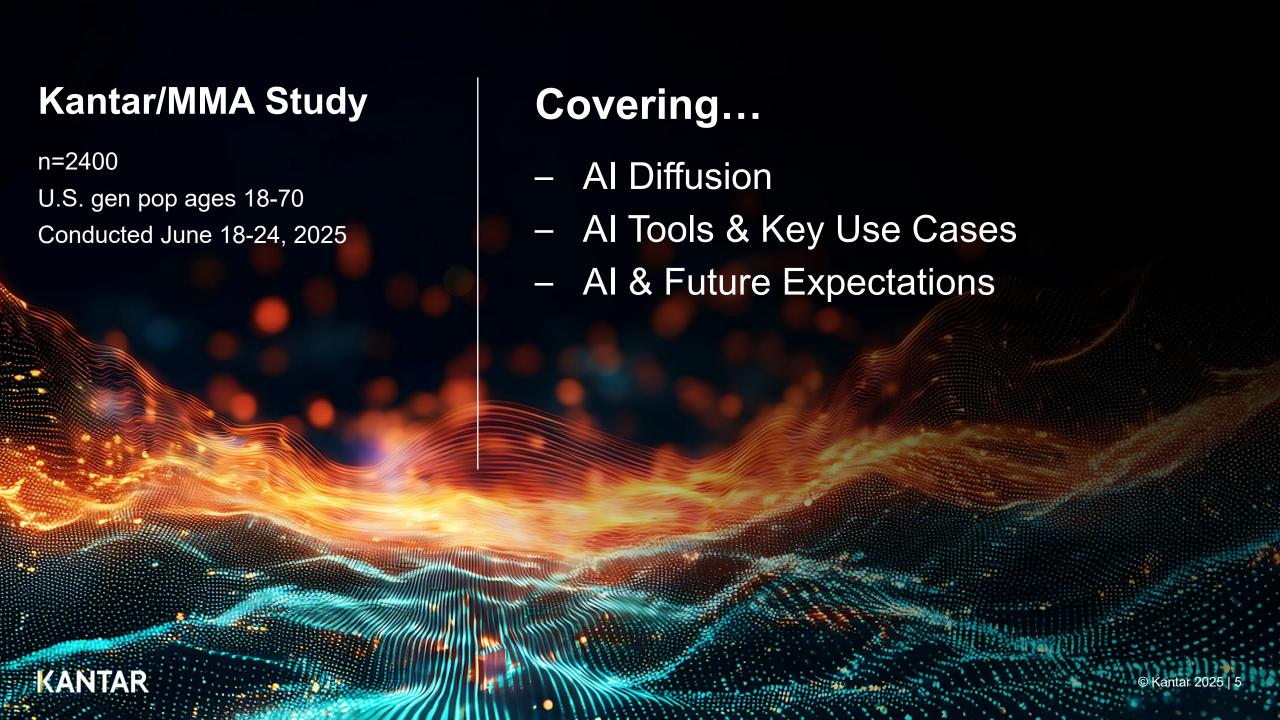


Open to having an Al as a regular friend



Open to having an Al as a girlfriend or boyfriend

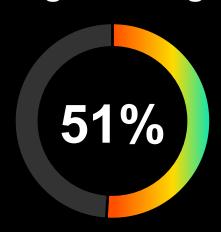
# We asked ourselves... Is consumer adoption of AI outpacing corporate readiness? What does real Al usage look like in consumers' everyday lives? What are the most critical divides? How are these shifts redefining what people expect from brands? KANTAR





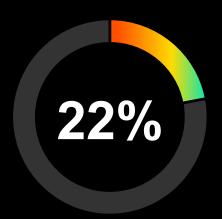
#### Most people are already using Al regularly, and one out of five is seeing their lives transformed

#### Regular usage



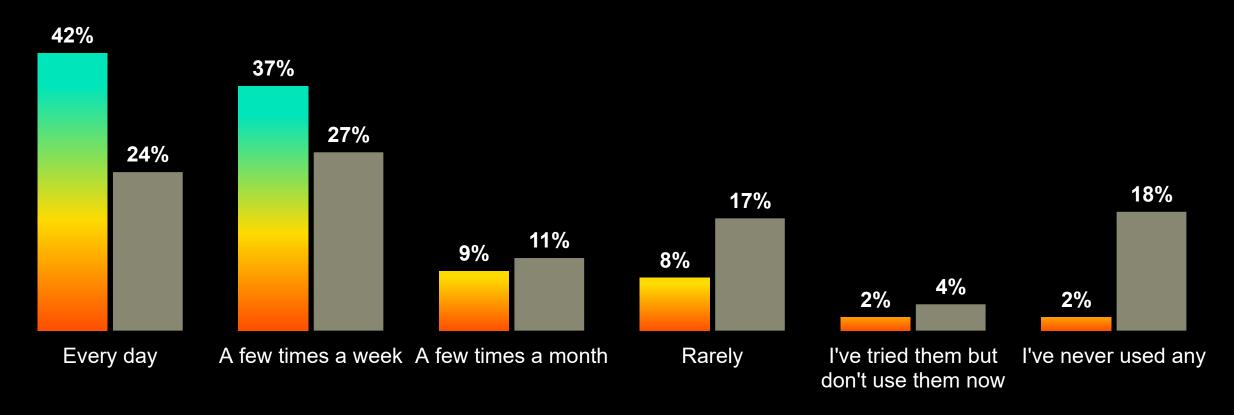
Of gen pop uses AI at least a few times a week

#### **Life transformation**



Of gen pop say "Al tools play a central role across most aspects of how I work, learn, or create"

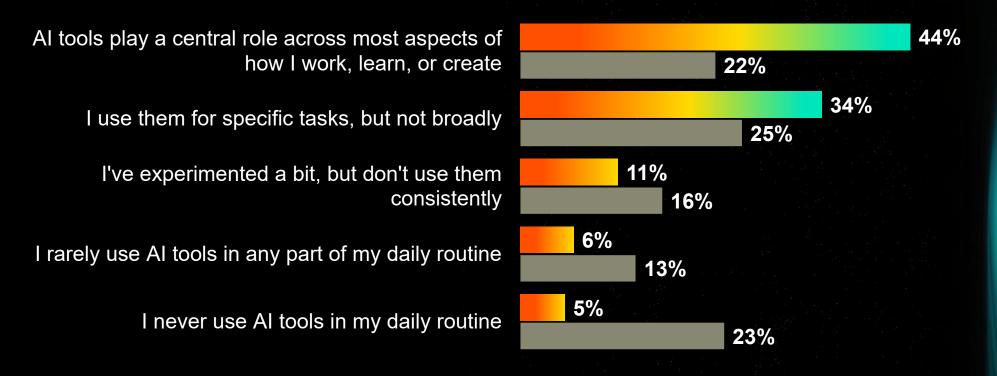
#### Almost 4 in 5 younger people use Al at least a few times a week



Frequency of AI tool use, %

■18-35 ■ Gen Pop

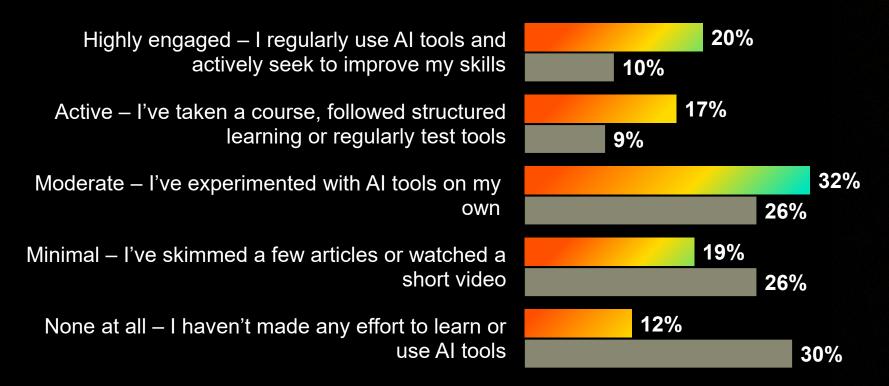
#### Especially for younger people, Al tools have rapidly moved to the center of life



To what extent are AI tools integrated into different areas of your daily life?

■ 18-35 ■ Gen Pop

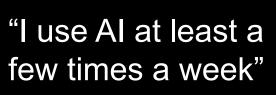
#### More than 1 in 3 younger people are actively aiming to improve their AI skills



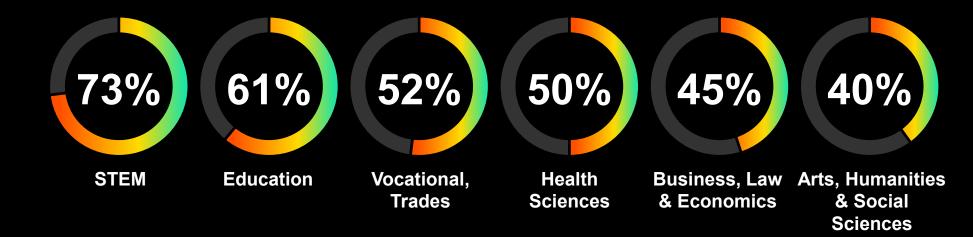
"How much effort have you personally made in the past several months to learn about or improve your use of AI tools?

■ 18-35 ■ Gen Pop

#### But active Al users might not always be the people you think...



by educational background after high school



Your workforce may not be ahead of consumers

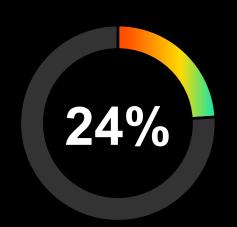


#### Who else is behind the curve?

### **Rural residents**

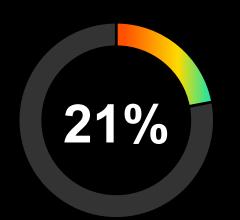
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"I use AI at least a few times a week"

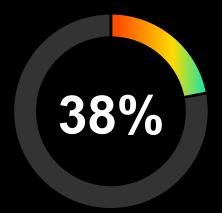


Of rural residents use Al at least a few times a week

## **Lower-income groups**



Of respondents earning less than \$25,000 per year



Of respondents earning between \$25,000 and \$49,999 per year

#### **Diffusion Findings: Implications for Marketing Leaders**

1

The AI-Powered Consumer Is Here

2

Al Natives Are Rising Next



Younger Consumers Are Upskilling with Al



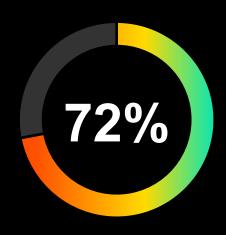
Consumers Are Ahead of Your Teams



A New Digital Divide is Emerging



### Consumers have moved beyond ChatGPT to a range of tools

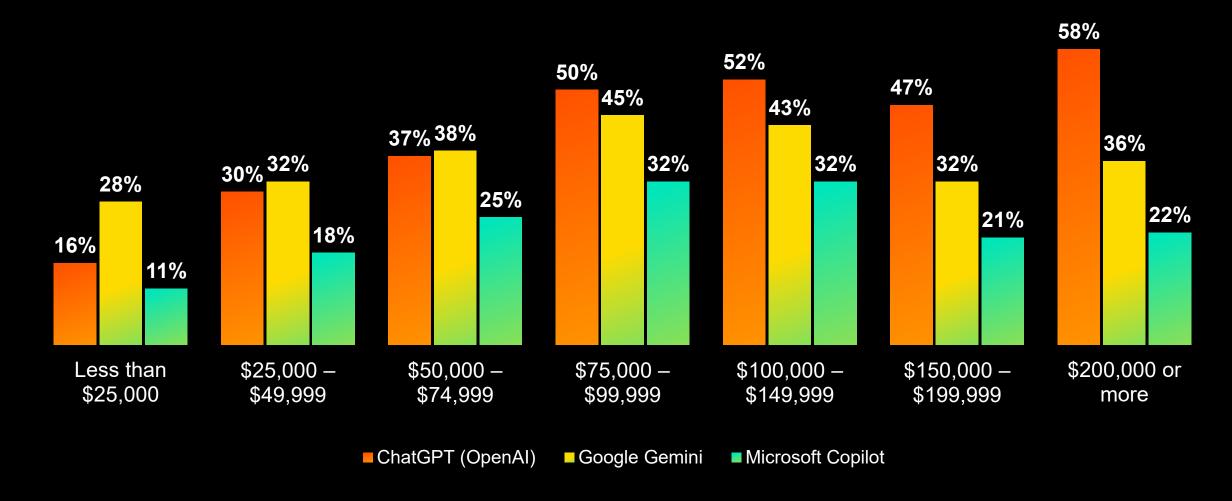


Of gen pop say they regularly use at least one general-purpose Al tool

MAINSTREAM TOOLS	
ChatGPT (OpenAl)	38%
Google Gemini	37%
Meta Al	33%
Microsoft Copilot	23%
Grok (X)	9%
Perplexity Al	9%
You.com Al	8%
Claude (Anthropic)	7%
I don't currently use any of these	28%
	III III III

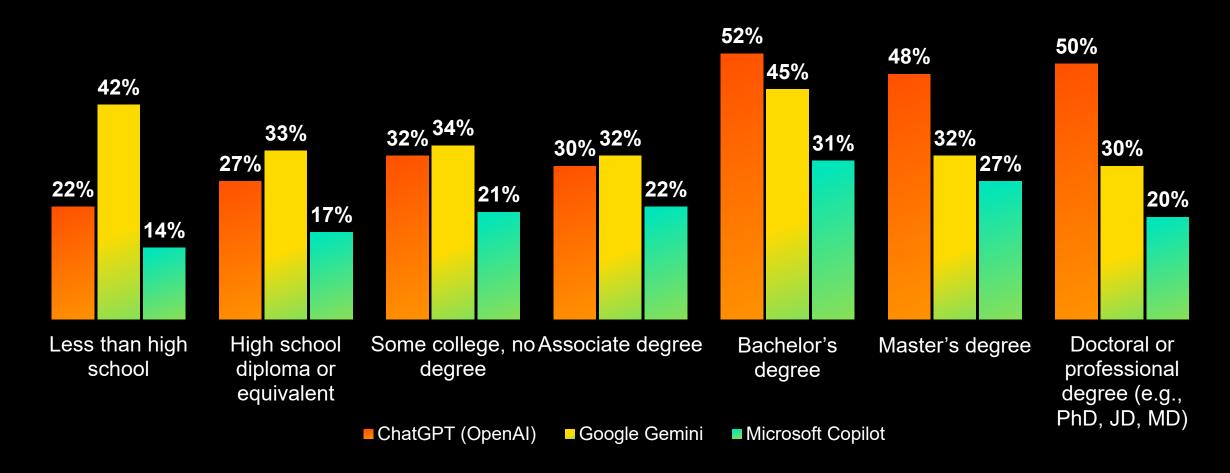


# Higher-income consumers over-index on ChatGPT usage, suggesting that different platforms reach different consumer cohorts



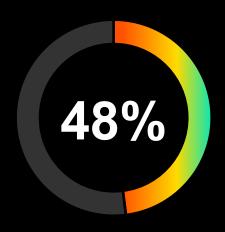


# Higher-education cohorts also favor ChatGPT, while Gemini enjoys its greatest popularity among bachelor's degree holders





### Even specialized AI tools are increasingly popular with the public

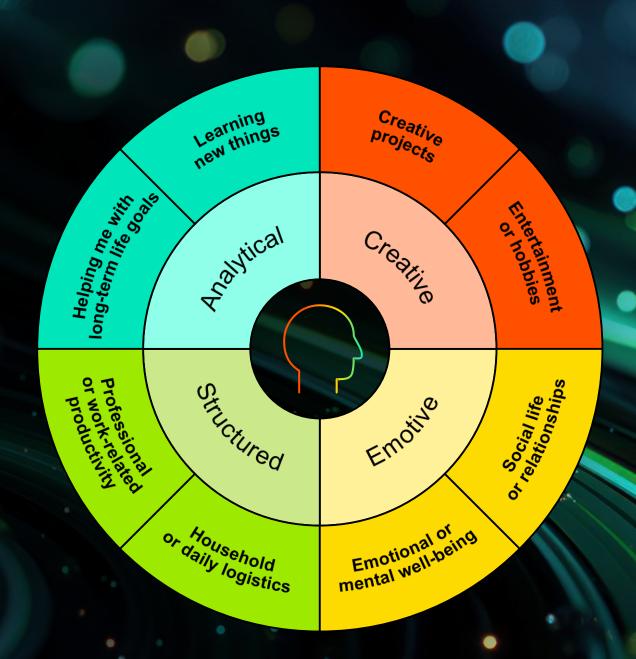


Of gen pop say they regularly use at least one specialized AI tool

"I currently use on a regular basis"		
Canva / Magic Studio	13%	
Grammarly	13%	
Copy AI	11%	
Character.Al	10%	
Adobe Firefly	10%	
Notion AI	9%	
Jasper	8%	
Zapier	8%	
Github Copilot	8%	
I don't currently use any of these	<b>52</b> %	

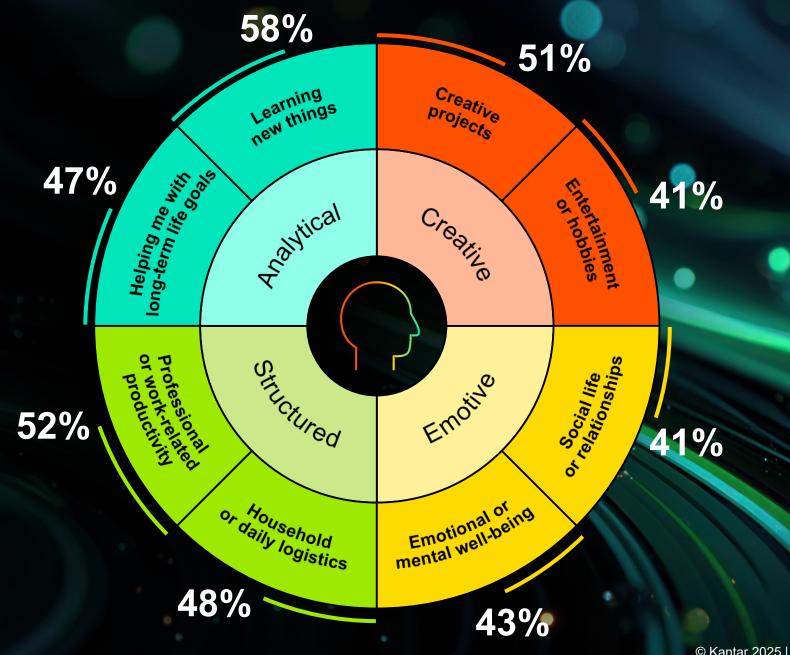


The Human+ Model

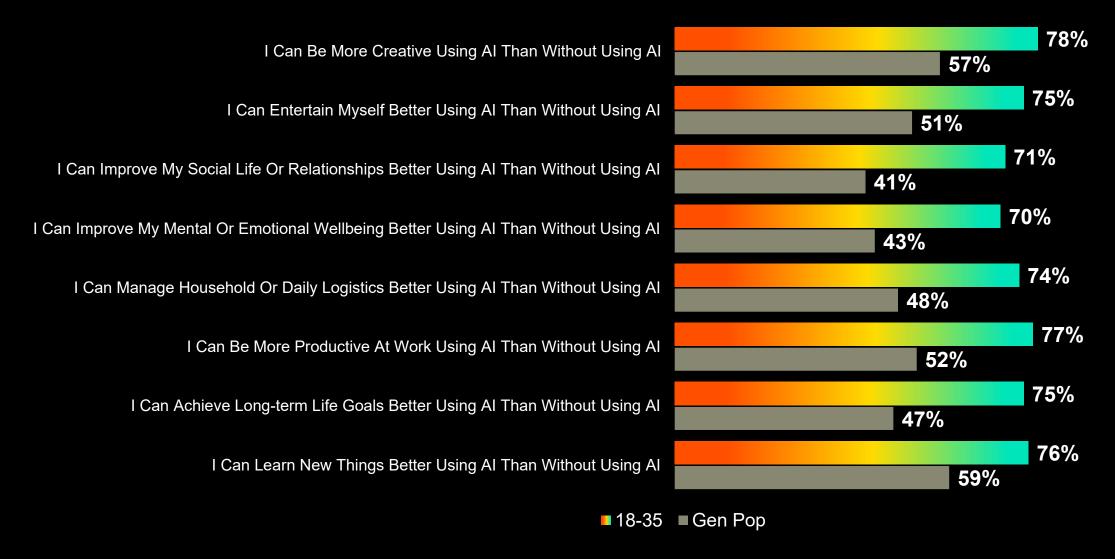


Al is changing the way people do every aspect of their lives

"I can pursue this better using AI than by myself"



#### Across use cases, younger consumers say they can do things better with Al





### Al is not just a product, but a powerful emerging channel



#### Al Tools & Key Use Cases: Implications for Marketing Leaders

1

Consumers' AI
Toolkits Are
Expanding Rapidly

2

Platform
Preferences
Reflect Consumer
Segmentation



Al Is Becoming a B2C Channel, Not Just a B2B Tool



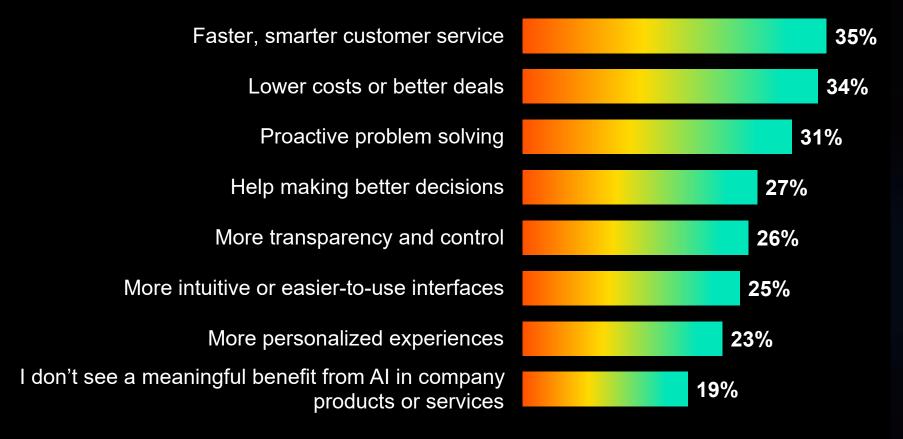
Younger Consumers Lead in AI for Creativity and Productivity



Specialized AI
Tools Offer New
Opportunities



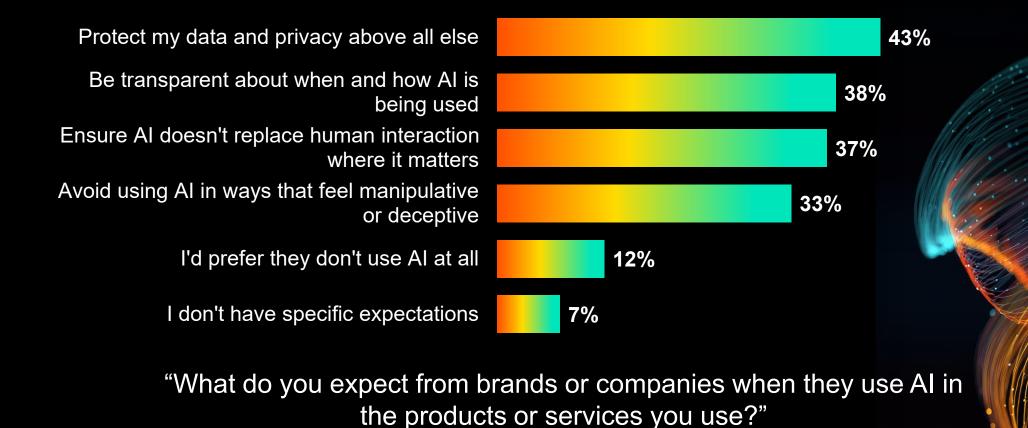
Consumers want businesses to use AI to improve their products and services...



"Where would you most like to see companies use AI to improve your experience??"

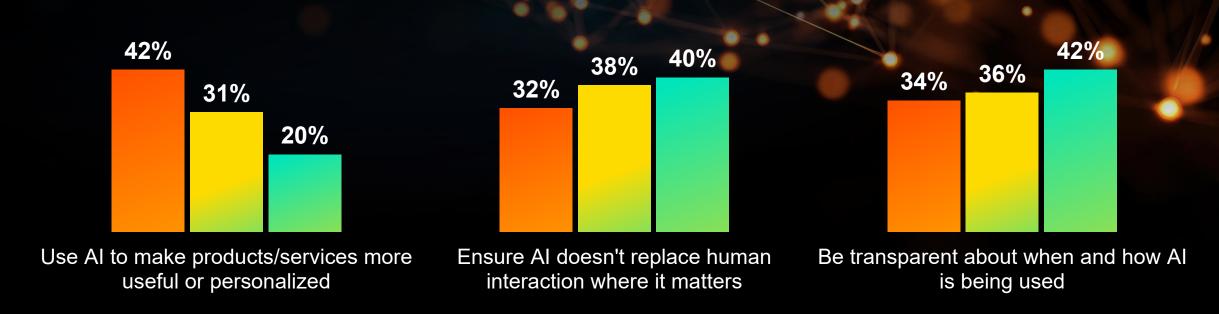


#### ...But they also want companies to move cautiously





Priorities vary by age – younger consumers are more likely to prioritize personalization, while older consumers care more about transparency and retaining the human element



"What do you expect from brands or companies when they use AI in the products or services you use?"

**■** 18 - 35 **■** 36 - 49 **■** 50 - 70

#### Opinion is evenly divided, with most people remaining cautious



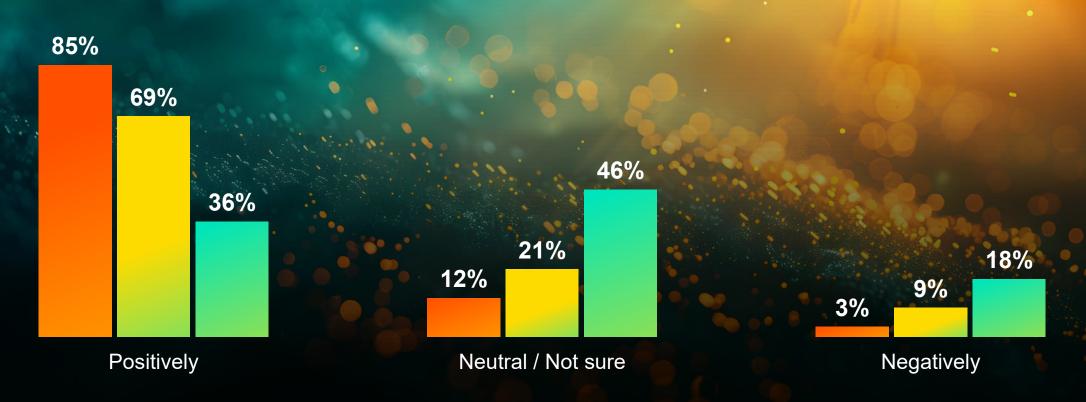
"How do you feel about companies using AI to interact with you (e.g. through customer service, recommendations, or content)?"

## The Al Trust Paradox

People are adopting Al across their lives, while also doubting whether they can fully trust it



#### When thinking about personal impact of AI, sentiment is overwhelmingly positive...



How do you feel AI will impact you personally over the next few years?

**■** 18 - 35 **■** 36 - 49 **■** 50 - 70

### ...However, people envision a mix of very positive outcomes for society...



#### ...and extraordinarily negative, verging on apocalyptic, outcomes for society as well



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#### How to explain this seeming contradiction?



Even if people believe AI might be bad for society, they don't think they'll be personally affected.

#### Real-world examples:

- Most people believe they are aboveaverage drivers
- People are irrationally optimistic that they can beat the market with their investments



For most people, the threat of societal disruption from AI is remote, while the convenience of AI is immediate and tangible.

#### Real-world example:

 People are concerned about how climate change will impact their long-term futures, while still eagerly accruing reward points with their favorite airline.

#### **A Dual Strategy**



# Maximize the Personal Win



#### **Brands should offer:**

- Seamless Integration into Existing Behavior
- Empower User Creativity and Control
- Show Immediate, Tangible Value

#### **Brands should be sure to:**

- Engineer Privacy by Design
- Commit to Responsible Al Governance
- Lead With Visible Safeguards and Education

#### Al Future Expectations Findings: Implications for Marketing Leaders

1

Many Al Doubters Are Also Al Adopters— Ambivalence is Near-Universal 2

Consumers Want
Tangible Benefits—But
Also Reassurance

3

Trust Depends on Transparency and Control



Dual Strategy: Maximize Value, Mitigate Fear

