Generative AI Adoption

The Report

CampusAI
Human+AI collaboration

Human+AI
INSTITUTE

Contents

November 30, 2022

OpenAI launches ChatGPT

March 2, 2023

Open letter from AI researchers & tech leaders (Elon Musk, Yoshua Bengio, etc.)

July 18, 2023

Meta releases LLaMA 2

THE RISE OF GENERATIVE AI

It began with a whisper—a few uncanny texts, a flicker of something almost human in the machine's voice. Then, like a wildfire, Generative AI roared into the world, reshaping everything in its path. The tech landscape would never be the same again.

In 2022, the business world witnessed a pivotal transformation with the advent of Generative AI technologies. OpenAI's release of ChatGPT marked a significant milestone, transitioning AI from a specialized tool to a mainstream business asset. This shift was confirmed by the rapid adoption of AI across various sectors, with 77% of companies declaring that they either utilize or explore AI applications as of today.

2022
THE SPARK

OpenAI dropped ChatGPT, and suddenly, AI wasn't just for researchers—it was for everyone. Conversations felt fluid, responses were clever, and for the first time, people started wondering: Is this thing... thinking? The internet exploded. 100 million users in two months. Students, programmers, marketers, artists—everyone seemed to be finding a use for it.

News headlines captured the frenzy: educators debated whetherA-I-generated essays signaled the end of traditional homework, while companies like BuzzFeed and CNET experimented with AI-written articles—sometimes with disastrous results. Meanwhile, Microsoft saw the future, investing $10 billion into OpenAI, betting big on AI--powered search and productivity tools. Even courts got involved, as New York lawyers faced sanctions for citing

ChatGPT-generated legal cases that didn't exist. It felt like the world had changed overnight, and everyone was scrambling to keep up.

October 26, 2023
EU Parliament a grees on AI Act framework

February 15, 2024
OpenAI announces Sora

February 2024
Google releases Gemini 1.5 with a 1M-token context window

March 2024
OpenAI enables real-time conversation and web browsing in ChatGPT

2023
THE GOLD RUSH

Big Tech saw the future and wanted in. Google rushed to launch Bard, its conversational AI, aiming to integrate it into search and other services. Meanwhile, Microsoft, in collaboration with OpenAI, embedded AI into Bing and Edge, redefining how users interact with search.

But 2023 wasn't just about corporate giants—it was also the year of open-source rebellion. Meta entered the scene with LLaMA, a family of powerful language models that put cutting-edge AI into the hands of researchers and developers. Within weeks, leaked versions of LLaMA 1 spread across the internet, fueling an open-source AI arms race. This shift culminated in the release of LLaMA 2 in July, officially open-sourced and setting a precedent for transparency in AI development.

The startup ecosystem exploded. Anthropic launched Claude, a rival to ChatGPT, emphasizing safety and steerability. Open-source models like Mistral and Falcon emerged, challenging the dominance of closed-source AI. Meanwhile, image generators like Midjourney v5, Stable Diffusion XL, and OpenAI's DALL·E 3 pushed the boundaries between human and machine creativity.

As AI-generated content flooded the internet, ethical concerns ignited fierce debates. Artists protested that their work had been used without consent to train AI models, leading to lawsuits against companies like Stability AI and Midjourney. The entertainment industry pushed back, with Hollywood actors and writers raising alarms about AI-generated scripts and digital replicas replacing human talent. With the legal landscape struggling to keep pace, one thing became clear: the genie was out of the bottle, and there was no putting it back.

2024
THE RECKONING

AI's capabilities now extend beyond text and images—generating music, writing code, and even producing feature-length films. OpenAI's Sora pushed the boundaries of AI-generated video, while Udio and Suno made AI-powered music creation accessible to anyone. The entertainment industry, already struggling with deepfake voices of artists like Drake, faced new challenges as AI-generated scripts and digital actors blurred the lines of creativity and consent. Meanwhile, Google's Gemini models and OpenAI's GPT-4 Turbo escalated competition, expanding AI's power and accessibility. As deepfake technology fueled misinformation and privacy concerns, governments scrambled to regulate AI. The EU's AI Act took shape, while U.S. lawmakers proposed measures like the DEEPFAKES Accountability Act to combat malicious AI-generated content.

Despite legal and ethical concerns, AI adoption surged. Autonomous agents like AutoGPT and BabyAGI hinted at a future where AI doesn't just assist—it acts, making independent decisions and reshaping workflows across industries.

January 2025

Reasoning-focused DeepSeek-R1 model

February 2025

OpenAI launches Deep Research

March 2025

China unveils Manus – fully autonomous AI agent

2025 THE NEW NORMAL

Now, AI agents don't just assist—they take action. Autonomous workflows are transforming industries, automating entire departments and driving efficiency to new heights. Personal AI concierges craft hyper-personalized experiences, seamlessly adapting to individual needs in real time. The boundaries between human and machine creativity are dissolving, giving rise to a new era of collaboration.

Industries are evolving all around us, reshaped by AI's growing influence. From business and entertainment to healthcare and education, the way we work, create, and interact is being redefined. The future isn't approaching—it's unfolding right before our eyes.

As AI's role deepens, legislation races to keep up, setting boundaries for what's real and what's artificial. Governments and regulatory bodies grapple with defining AI-generated content, intellectual property rights, and ethical AI deployment. The world is adjusting to a new reality—one where AI is not just a tool but an active participant in shaping the future.

Aureliusz Górski
CEO & Founder CampusAI

GenAI arrived like a storm, but it hasn't passed—it's here to stay. Constantly evolving, it's rewriting the rules of what it means to create, work, and think. The pace of change is relentless, and we are only at the beginning of this transformation.

In this report, we're helping businesses on both sides of the Atlantic navigate this fascinating future. Whether adapting to new AI-driven workflows or rethinking strategies for a world where human and machine collaboration is the norm, preparation is key. The future isn't just coming—it's already here.

2030

THE ERA OF THE POSSIBLE

Human+AI
INSTITUTE

by CampusAI

The Human+AI Institute, launched by CampusAI, is dedicated to co-crafting a future with AI that empowers, assists, and guides humans—while never seeking to replace, deceive, or fake them. Our mission is to provide data, tools, and critical insights into the broad spectrum of human+AI collaboration, benefiting society, innovators, researchers, and market players in the AI industry.

> "Our ambition is for the Human+AI Institute's studies to become a kind of barometer of what is happening in AI technology and how it is perceived.

prof.
Dariusz Jemielniak
Head of Human+AI Institute

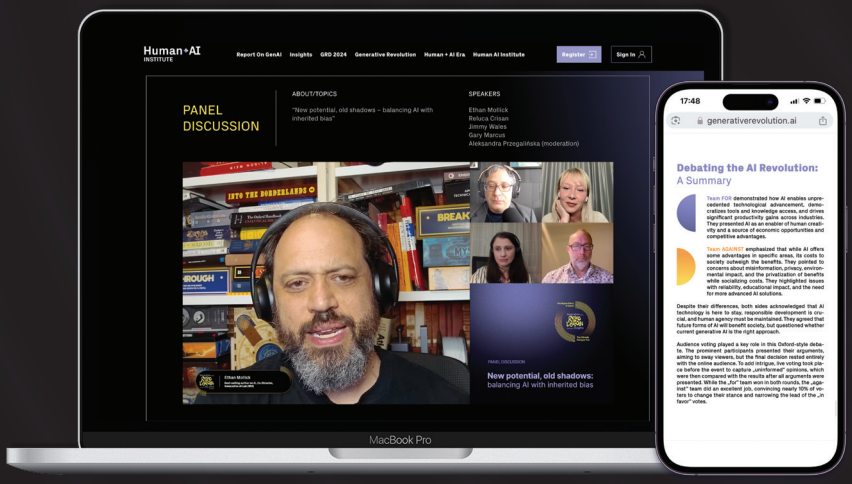
Vice-President of Polish Academy of Sciences,
Faculty Associate (Harvard)

The celebration of Generative Revolution Day, a yearly event, sets a starting point for pioneers, world-class thought leader, AI enthusiasts and critics to gather online, ignite fresh ideas, and inspire each other for the year ahead. We call the initiative Generative Revolution Insights because it focuses on driving meaningful dialogue about AI, gathering diverse perspectives, and conducting a global study on generative AI adoption.

The Ripple Effect of GenAI

Generative REVOLUTION Insights

The Ultimate Dialogue Hub



Join the next wave of research!

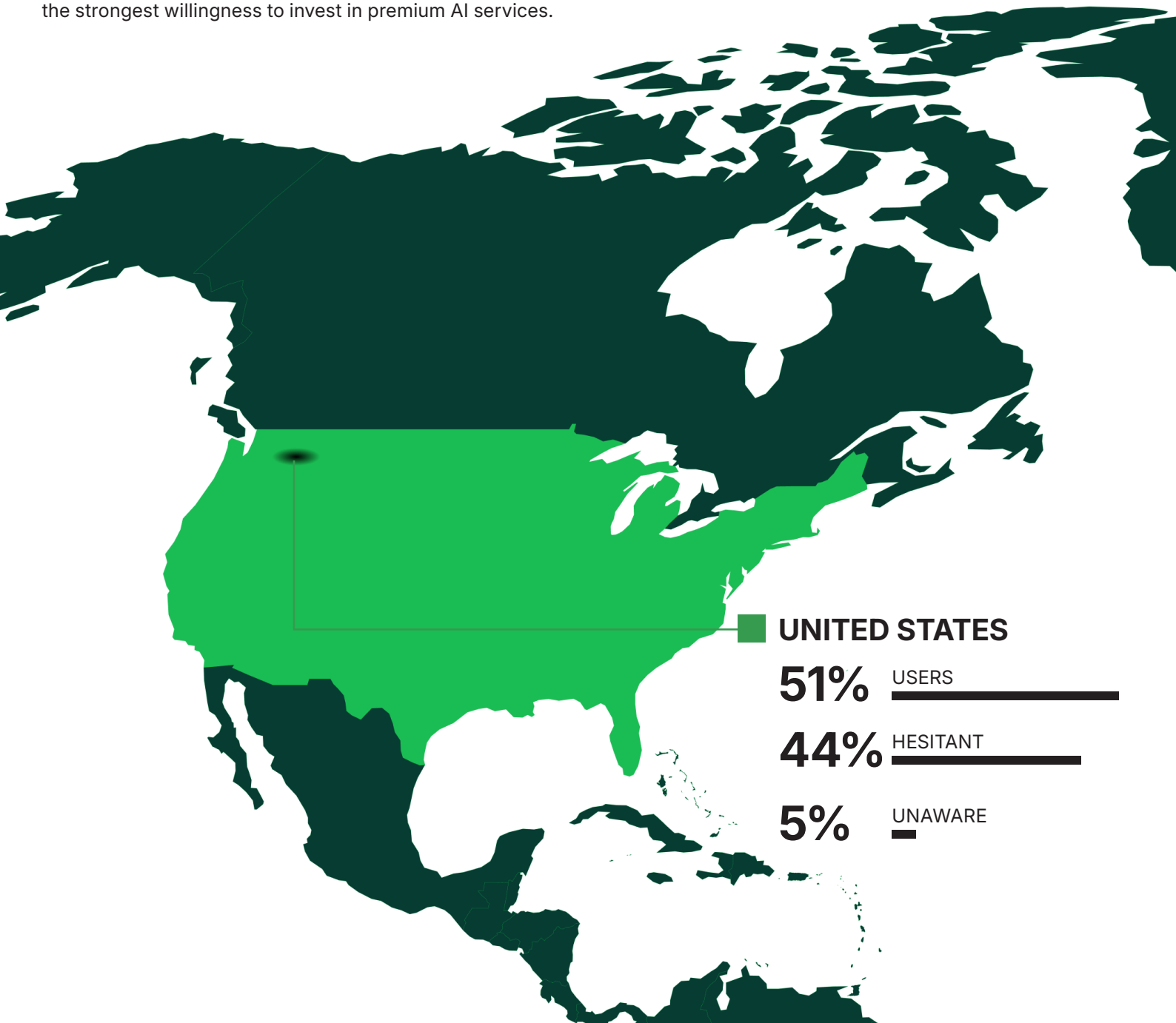
Collaborate, explore and shape the future of generative AI!

Through impactful debates and comprehensive research, we've analyzed thousands of respondents across four countries for The Report on Generative AI Adoption. And this is just the beginning! We're expanding our research to map GenAI adoption across 40 countries worldwide, aiming to create the most comprehensive picture of how different populations across all continents embrace this technology.

prof.
Aleksandra Przegalińska
CampusAI Science Board
Senior Research Associate (Harvard),
Vice-Rector (Kozminski University)

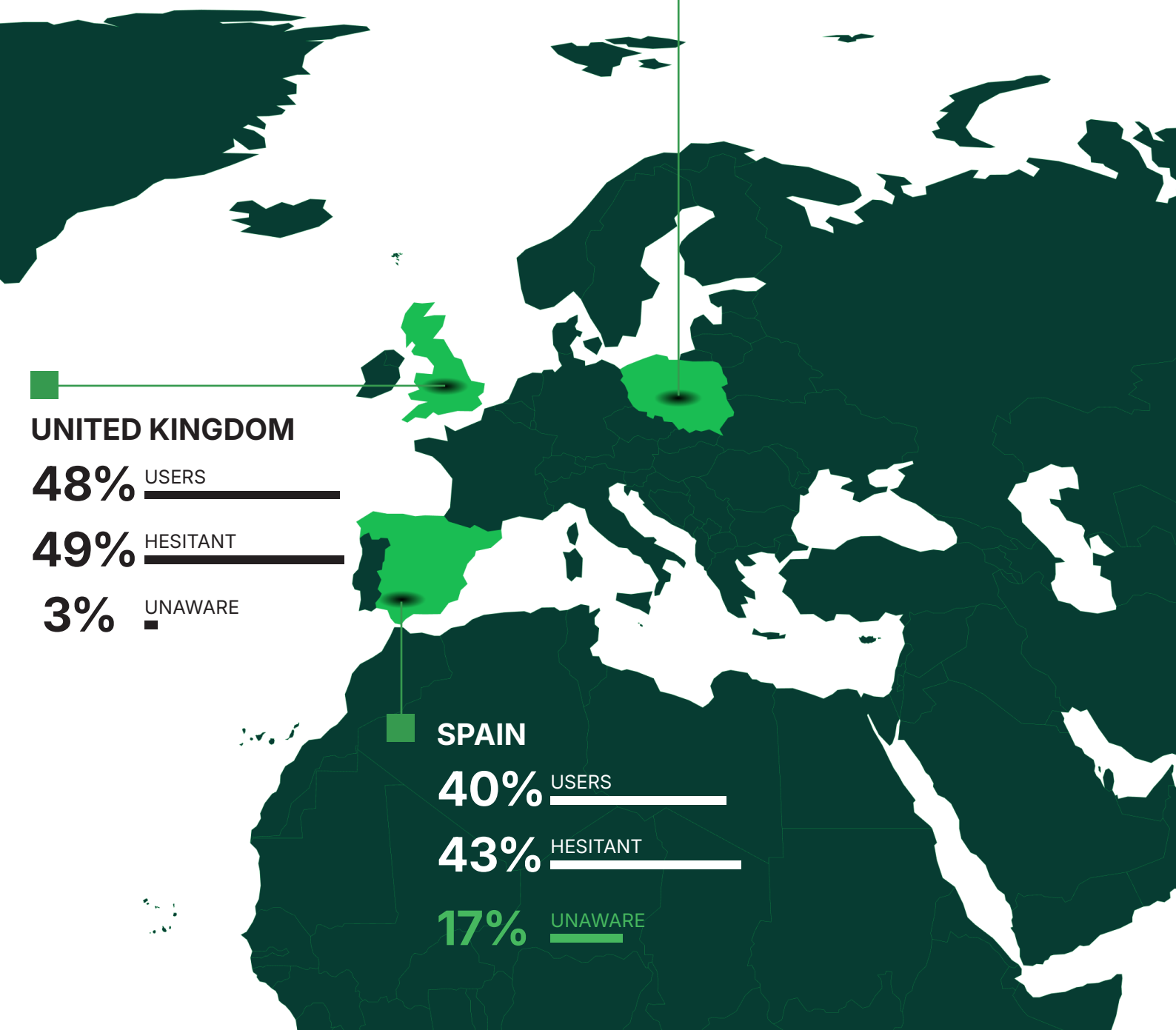
Generative AI: A World View

This report analyzes generative AI adoption patterns across four key markets: Spain (ES), Poland (PL), the United Kingdom (UK), and the United States (US). Our findings reveal distinct adoption profiles, highlighting opportunities for businesses to tailor their AI strategies to regional characteristics. Poland emerges as a surprising leader in adoption rates, while the US demonstrates the strongest willingness to invest in premium AI services.



UNIVERSAL ADOPTION TIME

On average, generative AI adoption takes **6 months** from the first trial to regular use, a trend observed across all researched countries.



POLAND

63% USERS

33% HESITANT

4% UNAWARE

UNITED KINGDOM

48% USERS

49% HESITANT

3% UNAWARE

SPAIN

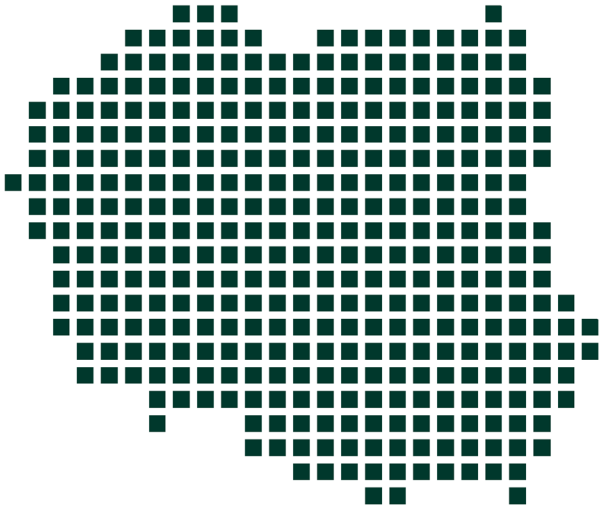
40% USERS

43% HESITANT

17% UNAWARE

POLAND

The Unexpected Leader



Poland emerges as the surprise frontrunner in generative AI adoption, with 63% of survey respondents actively using these tools—significantly higher than other markets. Notably, frequent users span all age categories, including seniors, which is uncommon compared to other countries. This challenges conventional wisdom about technology adoption patterns in Central European markets.

54% heard of ChatGPT — **84%** of them are using it

29% heard of Gemini — **86%** of them are using it

20% heard of Copilot — **77%** of them are using it

63%

of respondents are actively using AI tools

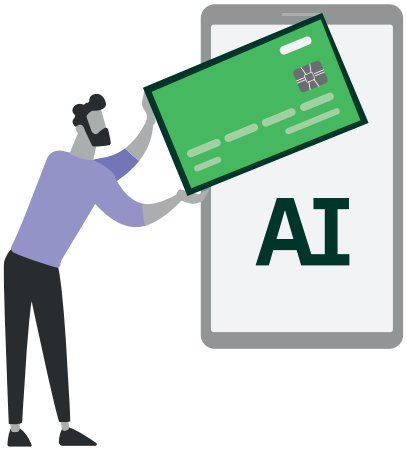
HESITANT, BUT READY

Polish users demonstrate remarkable enthusiasm for AI tools, with 58.4% expressing a desire to learn more about AI technology—the highest percentage of any surveyed country. Importantly, Poland has the lowest percentage of non-users, with most of them being "hesitants" who are aware of GenAI but haven't yet used it. This suggests a market with high awareness and openness to further expansion and educational opportunities once the barriers are identified and approached appropriately.

58.4%

expressing a desire to learn more about AI technology

The US market presents a fascinating contradiction. With a 41% adoption rate, it sits below both Poland and the UK. However, American users show exceptional willingness to pay for premium features, with 72% of those planning to increase personal usage also willing to invest in premium options of genAI tools—far exceeding other markets.

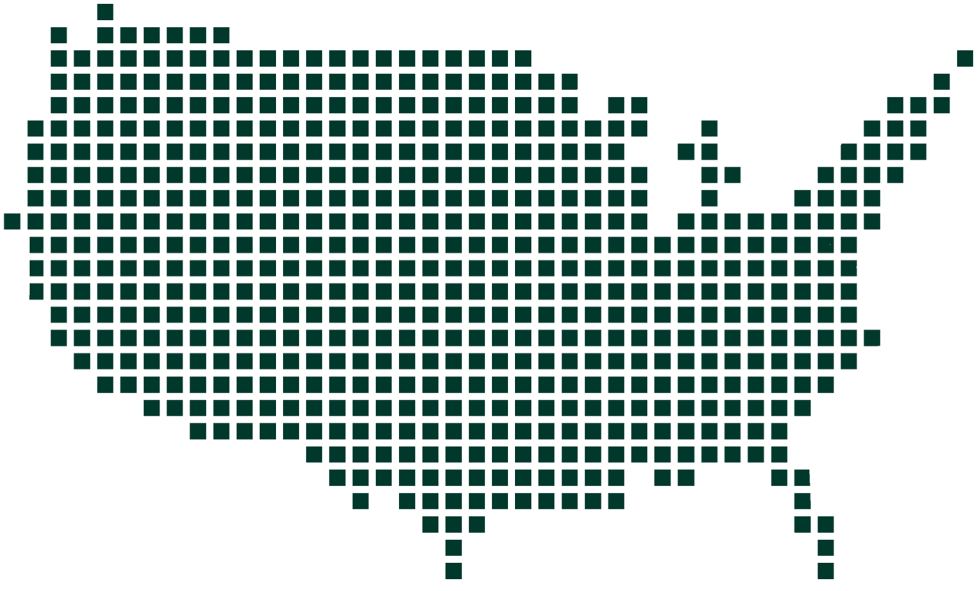


72%
planning to increase personal usage also willing to invest in premium options

41%
adoption rate

UNITED STATES

Contrasts in Adoption



61%
heard of ChatGPT

57%
of them are using it

37%
heard of Gemini

51,9%
of them are using it

38%
heard of Copilot

52,7%
of them are using it

PIONEERS AND HOLDOUTS

The US leads in GenAI expertise, with 10% of users self-reporting as advanced—outpacing Poland (8%), the UK (5%), and Spain (2%). On the other hand, 49% of Americans are still not using the GenAI at all, even though almost all of them are aware of the tools. Adoption patterns also reveal generational and gender gaps: older adults (55+) and women are overrepresented among non-users. Targeted strategies that address trust, privacy, and accessibility barriers may be the key to unlocking broader adoption.

UNITED KINGDOM

The Balanced Adopter

48%

of respondents using generative AI tools

British users demonstrate moderate enthusiasm for future adoption, with approximately 35.1% expressing interest in learning more about AI. However, a striking generational divide is emerging, as younger users—especially those under 25—embrace AI at record rates, while adoption drops sharply among older adults.

61% heard of ChatGPT — **58%** of them are using it

37% heard of Gemini — **38%** of them are using it

35% heard of Copilot — **47%** of them are using it

LATE SURGE

With early adopters constituting only 14.1% of UK users—the lowest percentage among surveyed markets—the UK represents a more recent mass market adoption story. Similar to Poland, the UK has a higher proportion of hesitant non-users (aware but not using) rather than completely unaware individuals, indicating a market with good awareness but some barriers to actual usage.

40%

of respondents using generative AI

SPAIN

The Cautious Approach

Spain shows the most reserved adoption pattern with 40.1% of respondents currently using generative AI. However, Spanish users demonstrate solid interest in future learning, with 48.8% wanting to learn more about AI technologies.

49%

wanting to learn more about AI technologies

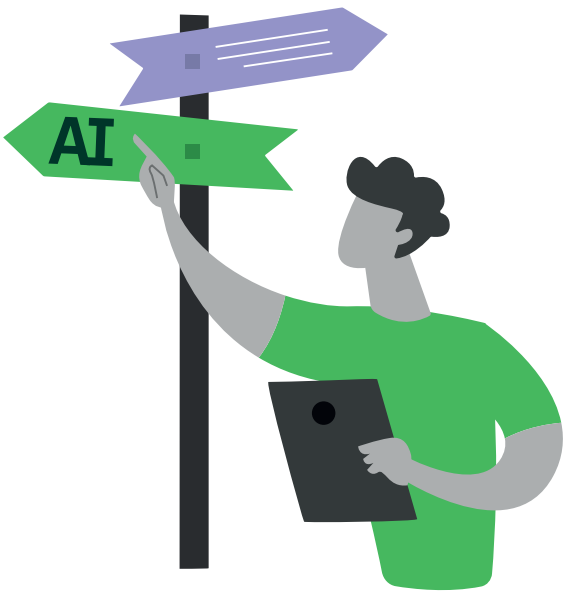
60% heard of ChatGPT — **72%** of them are using it

22% heard of Gemini — **75%** of them are using it

21% heard of Copilot — **80%** of them are using it

AWARENESS GAP

Spain displays the highest percentage of completely unaware non-users compared to "hesitants." This suggests that in Spain, the primary challenge is raising basic awareness rather than converting those who know about GenAI but aren't using it. The market shows untapped potential that could be addressed through broad awareness campaigns.



Purpose-Driven Adoption

TOP

5

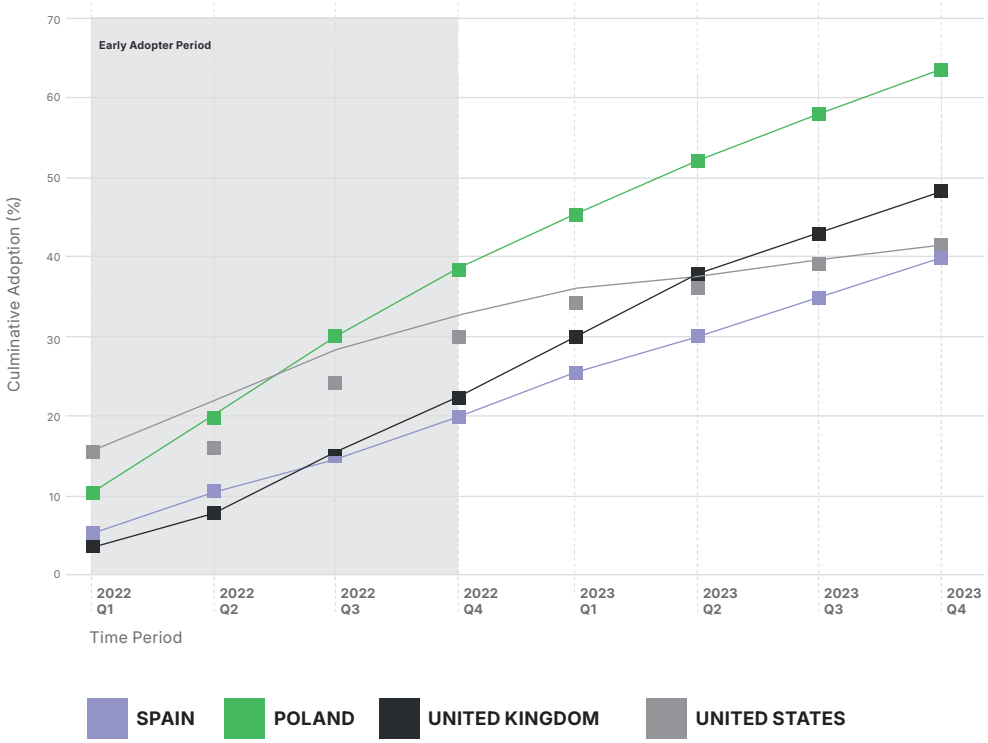
The top five reasons for using generative AI remain consistent across markets:

- **CREATIVE INSPIRATION**
- **LEARNING**
- **PROFESSIONAL PRODUCTIVITY**
- **PARTIALLY AUTOMATING TASKS/ PREPARING DRAFTS**
- **CURIOSITY/ ENTERTAINMENT**

This consistency in purpose suggests underlying universal needs that transcend regional boundaries.

Brand recognition trumps category awareness: 2× more users identify with tools like ChatGPT and Gemini than with "conversational AI" as a concept.

GenAI Adoption Timeline by Country



The US leads in rapid GenAI adoption, with 15% of users having started regular use 1.5 to 2 years ago—an expected trend given that the AI revolution was launched there. However, Poland's performance is particularly striking, with 11% of users following the same pattern, despite entering the global AI race later.

Even more impressively, Poland now surpasses the US in overall GenAI adoption (64% vs. 51%), highlighting its strong momentum as an emerging AI-driven market. This growth aligns with the fact that the **percentage of Polish companies using AI increased by 36%** over the past year—the fastest rate among EU countries.

ChatGPT: The Universal Gateway

SPAIN

60% awareness with 71.8% of those aware becoming users

POLAND

54% awareness with remarkable 84.0% conversion from awareness to usage

UNITED KINGDOM

61% awareness with 57.7% conversion

UNITED STATES

61% awareness with 57.0% conversion

While awareness of tools like Gemini, Copilot, Claude, and Perplexity varies significantly across markets, ChatGPT maintains consistent dominance. This suggests businesses should consider ChatGPT integration as a foundational element of any AI strategy.

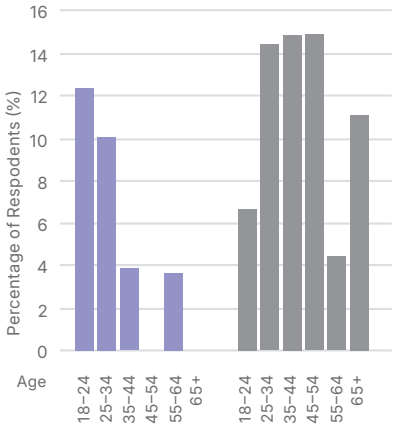
However, ChatGPT usage frequency reveals distinct age patterns across markets.

Most surprisingly, in Spain, Poland, and the US, seniors aged 65+ are more likely to use ChatGPT occasionally than those in the 55–64 age bracket—inverting typical technology adoption patterns.

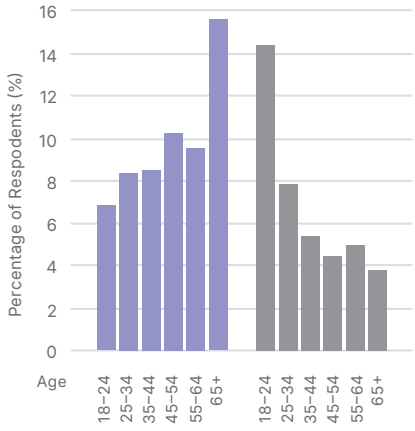
While younger users (18–34) generally show higher frequent usage, each country displays unique characteristics.

In Poland, student-age users are twice as likely to be frequent users as working-age people, though Poland maintains the most even distribution of frequent usage across all age brackets.

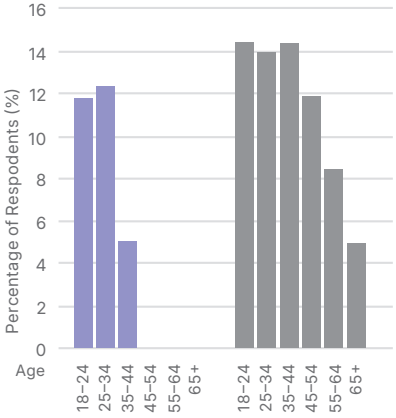
SPAIN



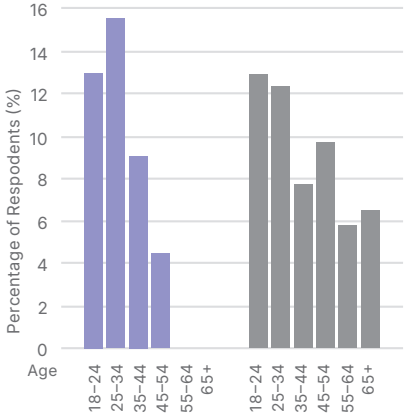
POLAND



UNITED KINGDOM



UNITED STATES



By contrast, the UK and Spain show dramatic drop-offs after age 45, with frequent usage nearly disappearing among older demographics (with rare exceptions in the 55–64 range in Spain).

Interestingly, occasional ChatGPT usage spans all age groups in all countries.

USAGE INTENSITY

HIGH (3–4)

LOW (1–2)

Self-Reported Skill Level

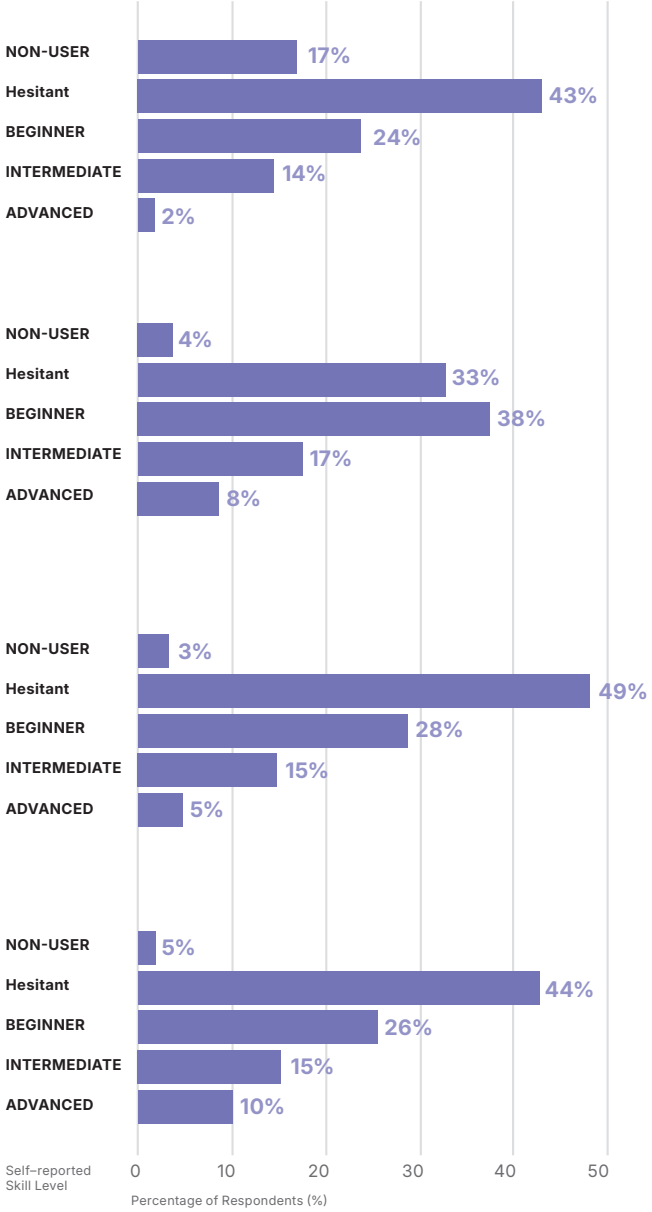
Younger demographics show higher engagement across all markets. However, Poland uniquely demonstrates high adoption across multiple age groups, suggesting broader generational appeal in this market.

Skill level assessment reveals intriguing patterns:

The US shows the highest proportion of both advanced users and complete beginners

Poland and the UK have fewer complete beginners but more intermediate users

Spain shows more concentrated distribution in the lower-to-mid skill ranges



SPAIN

Spain has the highest percentage of non-users (59.9%) and the lowest advanced user share (1.9%), showing that adoption is still in its early stages.

POLAND

Poland stands out for its high share of beginners (39.5%), indicating strong early adoption and a growing AI-literate population.

UNITED KINGDOM

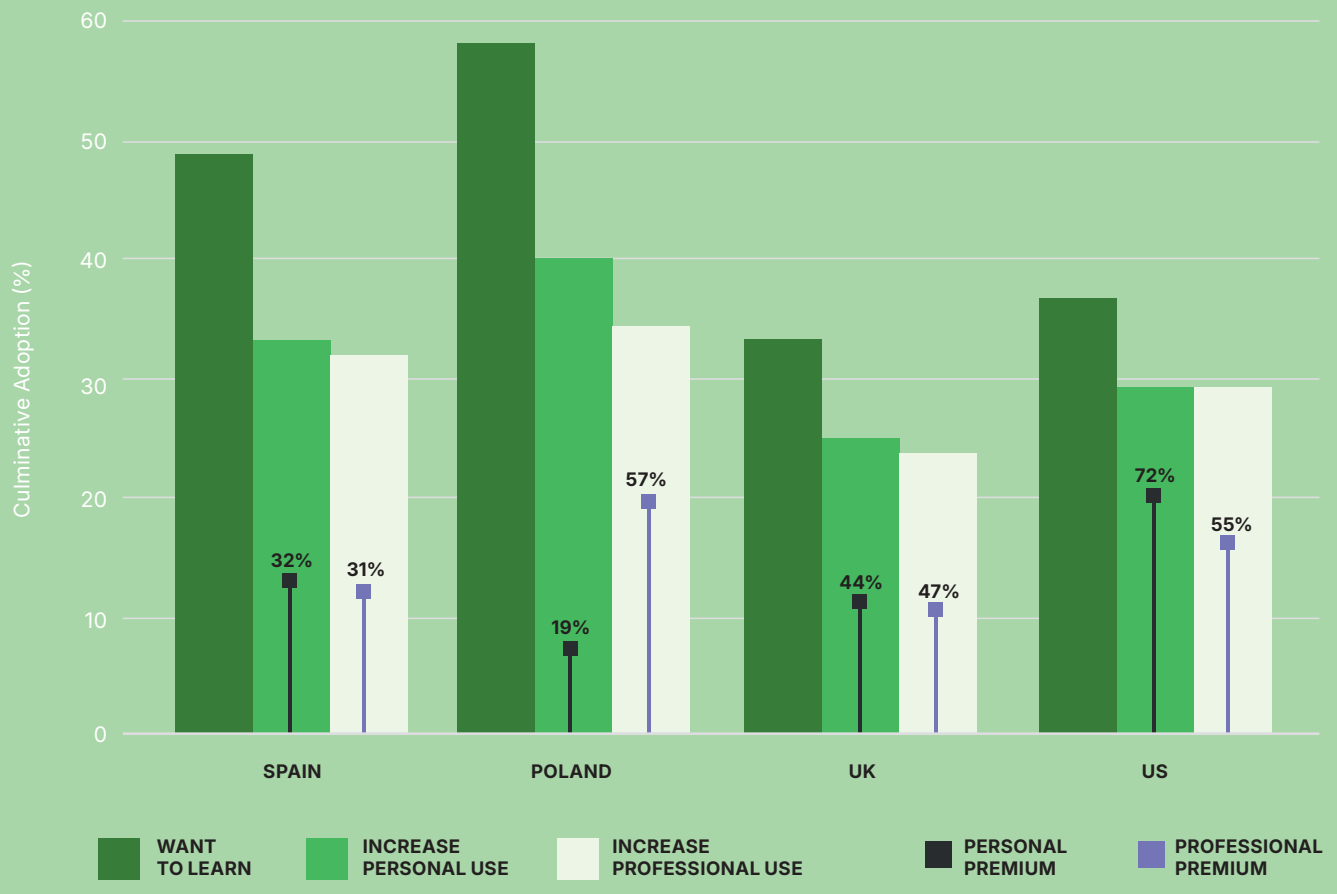
The UK has a balanced adoption curve, with nearly equal proportions of beginners and non-users, reflecting an ongoing transition toward mass adoption.

UNITED STATES

The US leads in advanced users (10.0%), but also has a relatively high non-user share (52.4%), highlighting a polarized market where AI is either deeply integrated or completely ignored.

Investment Readiness: Premium Features

Perhaps most compelling for businesses is the substantial willingness to invest in premium generative AI features:



Poland leads in overall interest with 58.4% wanting to learn more about AI and nearly 40% planning to increase personal usage. However, when it comes to premium conversion, the **US demonstrates exceptional willingness to pay**—72% of those planning to increase personal usage are willing to invest in premium features, far surpassing other markets.

For professional premium features, **Poland shows the strongest conversion potential** at 57% of those planning to increase professional usage, followed closely by the US at 55%. The UK maintains a moderate position for both personal (44%) and professional (47%) premium conversion. Spain shows the lowest premium conversion rates for both categories (32% for personal and 31% for professional).

These figures reveal an important pattern: in Poland, the UK, and the US, there's a significantly higher willingness to pay for professional premium features than personal ones, with this gap being most dramatic in Poland (57% vs. 19%). This suggests business-oriented GenAI solutions may have greater premium potential in these markets. The US stands out as the only market with strong premium conversion potential in both contexts, indicating American users see value in premium GenAI features across all use cases.

Strategic Implications for Businesses

01

MARKET-SPECIFIC APPROACHES

One-size-fits-all strategies will likely underperform. Poland and the UK need strategies focused on converting hesitant non-users who are already aware of GenAI. The US and Spain need more basic awareness campaigns targeted at completely unaware segments.

02

PREMIUM OPPORTUNITY

The US market demonstrates exceptional readiness for premium AI services (72% willing to pay), suggesting potential for higher-tier offerings.

03

EDUCATIONAL MARKETING

Across all markets, substantial percentages (35–58%) want to learn more about AI, suggesting educational marketing will resonate strongly.

04

ChatGPT PARTNERSHIP PRIORITY

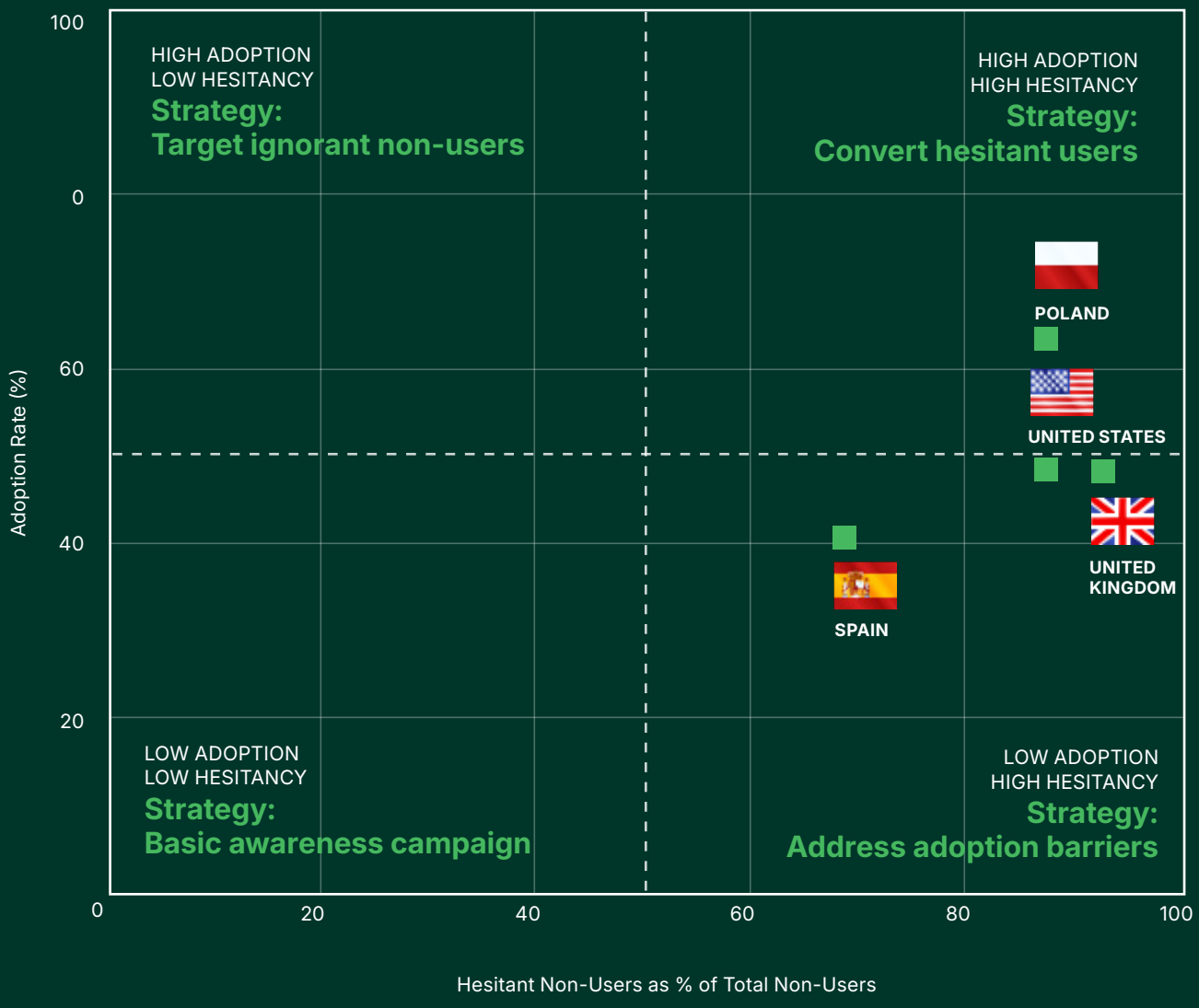
Given ChatGPT's universal gateway status, integration with or complementary services to ChatGPT should be still considered beneficial.

05

POLAND AS TEST MARKET

Poland's high adoption rates (63%) and few completely unaware non-users make it an excellent test market for new generative AI products and services.

Market Strategy Quadrant Based on User Types



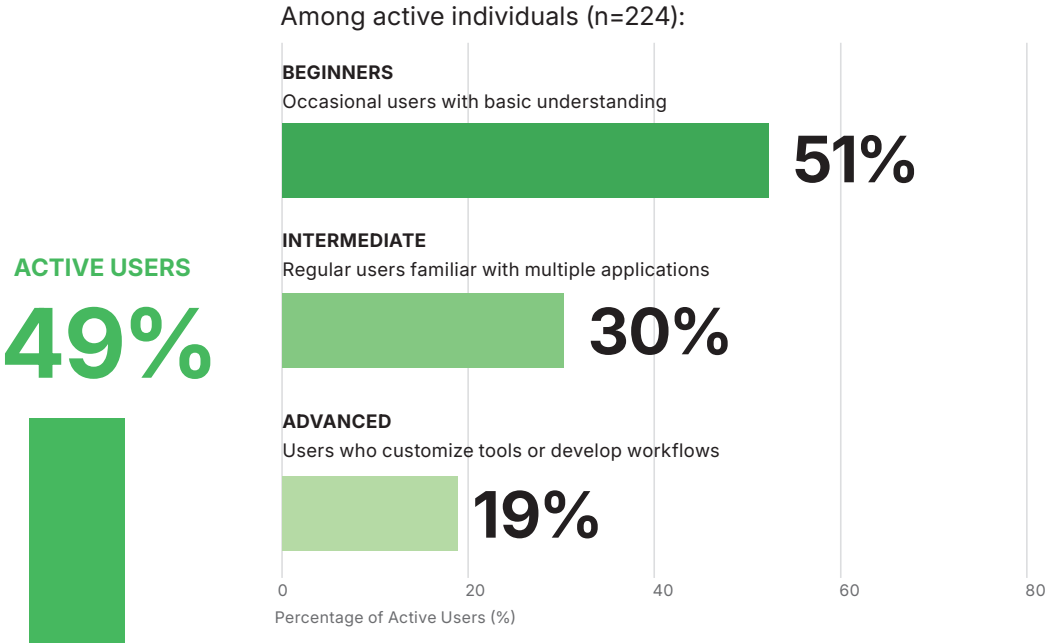
Conclusion

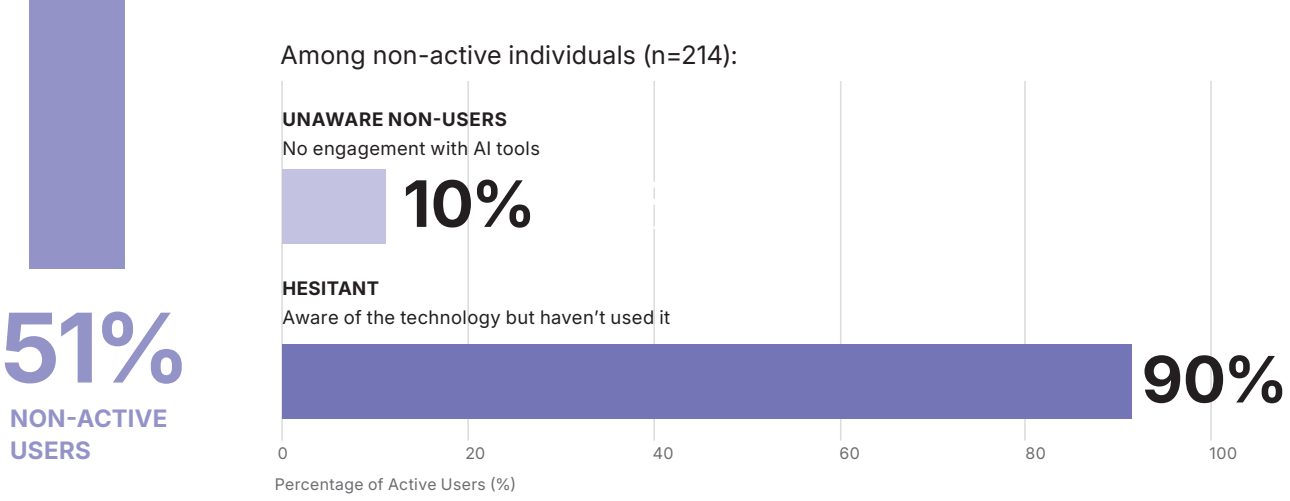
The generative AI landscape reveals itself not as a single market but as diverse regional ecosystems with distinct characteristics. For businesses seeking to capitalize on this revolutionary technology, understanding these regional adoption patterns is essential to developing effective strategies. The data clearly shows that while generative AI adoption is accelerating globally, the paths being taken differ significantly by market—creating both challenges and opportunities for businesses ready to navigate this complex terrain.

UNITED STATES

The US market shows a stark divide in GenAI adoption, with nearly half (49%) actively using these tools, yet a significant portion (51%) remaining on the sidelines. The national trends suggest workplace adoption (28%) slightly lags behind home use (32%), possibly indicating that professional settings still face legal and technical integration barriers.

When we look more closely at **active users**, three distinct user groups emerge based on self-assessed skill level: **beginners (51%), intermediate (30%), and advanced+ (19%)**. At first glance, it might seem surprising that over half of all active users identify as "beginners". Yet this reflects the nature of generative AI's rapid rise—many who have taken initial steps to try ChatGPT, image generation tools, or other AI services still feel they have a lot to learn. The Beginners' group largely describes an exploratory phase: they experiment casually, often for personal tasks like creating short drafts or researching a topic, and may not fully appreciate the deeper capabilities AI tools can offer.





01. Understanding the Silent Majority: America's GenAI Non-Users

The integration of Generative AI into American life presents a fascinating study in contrasts. While organizations are racing to embrace this technology, individual adoption follows a more measured path, with 49% of Americans actively using these tools. This gap between enterprise implementation and individual adoption suggests significant potential for growth as organizational usage drives personal engagement.

Moreover, our research reveals an even more nuanced picture of independent adopters. Among non-users, overwhelming 90% are aware of GenAI tools but haven't taken the step to use them, while only 10% remain completely disconnected from this technological wave. This back-seat approach suggests that the barriers to adoption aren't primarily about awareness or access, but rather about more complex factors involving trust, perceived utility, and personal readiness.

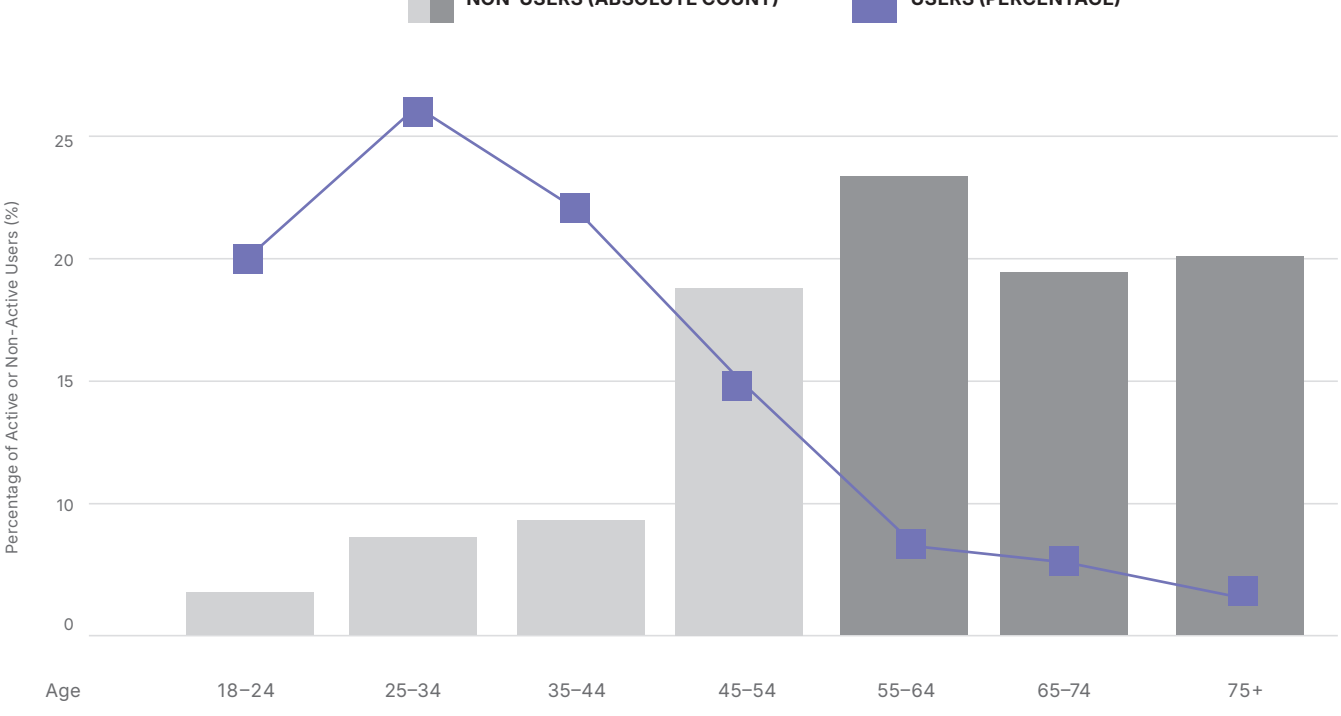
The Demographics of Non-Adoption

The pattern of non-adoption follows clear demographic lines, with age emerging as a particularly significant factor. **The majority of aware non-users –63% – are over 55 years old, while only 12% fall into the 18–34 age bracket.**

Gender also plays a notable role in this landscape. **Women make up to 58% of aware non-users, compared to 42% of men**. This gender gap becomes even more significant when considering that it persists across education levels. Even among those with college degrees, women show higher rates of non-adoption than their male counterparts.

Education itself tells another story. Among aware non-users, 40% hold college degrees or higher education levels. **This challenges the simple narrative that education automatically leads to technology adoption.** It shows that even highly educated individuals choose not to adopt GenAI for reasons beyond simple capability or understanding.

Comparison of Generative AI Non-Users and Users by Age Group



SECURITY & PRIVACY

82%

The primary concern among non-users is on data protection and personal information security. This barrier intensifies among older age groups and those with higher education levels.

TRUST IN AI SYSTEMS

71%

Non-users express significant doubts about AI reliability and accuracy. The trust gap remains consistent across education levels but varies with age.

FEAR OF MISUSE

68%

Concerns about potential negative applications of AI technology represent the third most significant barrier. This worry is particularly strong among those with higher education levels.

LEARNING CURVE

64%

The perceived complexity of GenAI tools creates a significant adoption barrier. This concern peaks among those of age 55+ (72% of this age group) but remains present across all age segments.

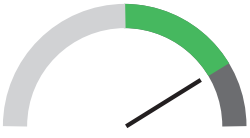
COST BARRIERS

52%

While not the primary concern, financial considerations still influence adoption decisions. This barrier is more pronounced among younger potential users (18–34) than older age groups.

Key Correlations

+0.72*

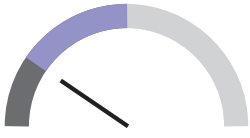


Higher education levels correlate with increased security concerns.

+0.68*

Age correlates strongly with learning curve concerns.

-0.62*



Professional necessity reduces the impact of all barriers.

*Percentage of Active Users (%)

Future Intentions

Despite these concerns, roughly one in five hesitant non-user reports being "somewhat likely" or "very likely" to try AI in the future. Many of them cite curiosity and positive reactions of friends and family as primary motivators, though they say they would prefer some type of guided demonstration or reassurance about data policies before diving in. Another equally sizable segment says they might "eventually need to learn it", typically if their workplace adopts AI tools. Still, a minority remains actively resistant, contending they see no tangible gains and prefer to wait until the technology is more mature or regulated.

For businesses and educational institutions seeking to expand AI literacy, these findings offer a critical takeaway: **the "hesitant" are not anti-AI so much as they are unconvinced**. Targeted efforts that **show clear, immediate benefits**, offer **safe "sandboxes"** for exploration, and provide **simple, transparent explanations of data practices** can all help lower the perceived barrier to entry.

The Adoption Tipping Point

01 90% awareness rate among non--users suggests especially high potential for adoption in near future.

03 Security and privacy concerns (82%) are identified as the primary barrier to overcome.

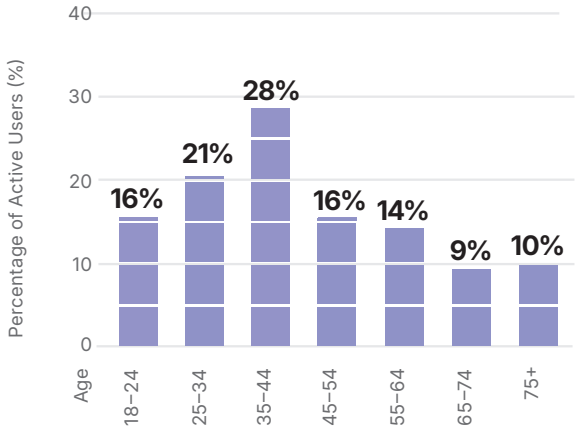
02 Professional necessity emerges as the strongest predictor of future adoption.

04 Age-related adoption barriers decrease significantly when clear professional benefits are present.

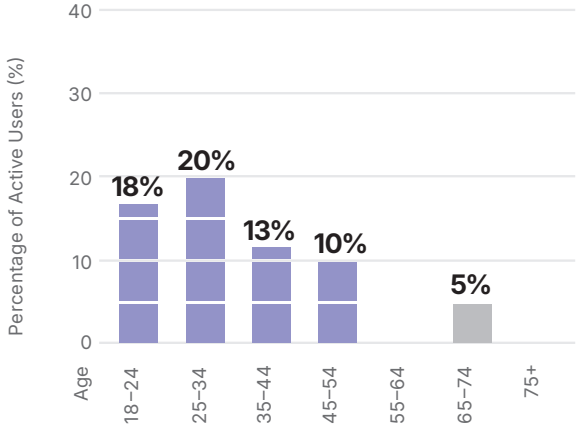
02. The AIready Convinced – GenAI Users

While downloading an app or creating an account may signal curiosity, it's the regularity of use—whether daily, weekly, or just a few times a year—that paints a clearer picture of how deeply AI is woven into someone's day-to-day life. Our survey results show that usage frequency correlates strongly with a user's self-assessed skill level. In other words, how often someone turns to GenAI can help predict how advanced or confident they feel in using it, and vice versa.

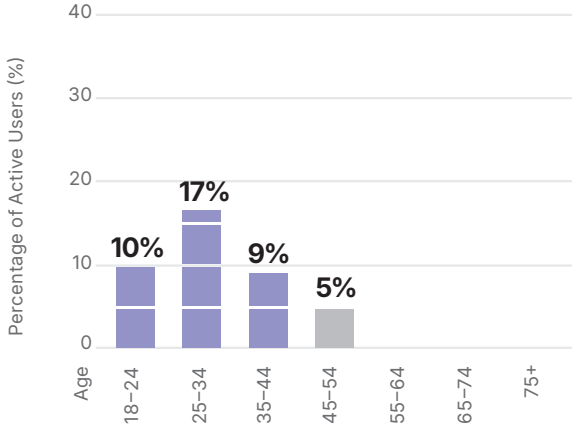
BEGINNERS



INTERMEDIATE



ADVANCED



Beginners: Light but Growing Engagement

Among the 116 respondents who identified as Beginners, usage patterns vary significantly, reflecting their early exploration phase. **30.2% self-reported as "occasional users",** engaging sporadically for quick tasks like drafting personal emails, brainstorming ideas, or experimenting with AI-generated content out of curiosity. Another 13.8% check in "several times a month", suggesting they are gradually finding more reasons to return. Some even progress to weekly (10.3%) or **daily use (4.3%)**, typically after discovering specific ways AI can assist them with work or personal projects, such as organizing notes or researching unfamiliar topics.

What truly stands out among beginners, however, is the relatively

high share of "non-active" users **21%**

report that, despite identifying as "users" in a broad sense, they haven't engaged with GenAI tools recently. Similarly, 21% state that generative AI has had no significant impact on any area of their lives, indicating that they do not yet perceive it as an important part of their environment. However, on the positive note, even though 31.6% of beginners find learning to use generative AI tools difficult, 62.2% still express a desire to learn more about them, suggesting that barriers to adoption may be more about accessibility and understanding rather than lack of interest.

Regarding usage purposes, the most common motivations are:

65%
CURIOSITY AND ENTERTAINMENT

62%
KNOWLEDGE EXPANSION

In contrast, personal branding, professional productivity, and task automation (whether partial or full) rank lowest, with each cited by only around 30% of respondents at best.

Intermediate Users: Steadier Habits

While

42%

of intermediates find learning to use generative AI difficult, a striking.

85%

express a strong desire to learn more about these tools, indicating that interest far outweighs perceived challenges.

In contrast, those who identify as "intermediate" users demonstrate noticeably more consistent usage. For instance, 23.9% use GenAI several times a week, and 20.9% are daily users—both significantly higher than among beginners. Only 3.0% of intermediate users fall into the "non-active" category, highlighting that once people discover practical, recurring applications for AI (such as drafting professional documents or conducting research), they rarely give it up entirely.

Interestingly, intermediate users also show a relatively balanced engagement at a monthly or occasional level. This suggests that some tasks—such as report writing or monthly presentations—may not require daily AI support but still benefit from a reliable tool when needed. Many in this group mention integrating GenAI into their routines for both personal and professional tasks, which helps sustain weekly or daily usage rather than leading to drop-off. This habit formation appears to be a key factor in transitioning from beginner to intermediate: the more tasks someone successfully completes with AI, the more likely they are to keep returning.

The most common motivations for usage are:

94%
CURIOSITY AND ENTERTAINMENT

94%
KNOWLEDGE EXPANSION

91%
CREATIVE INSPIRATION

whereas personal branding (72%) ranks lowest among stated reasons.

Skill and Frequency in a Positive Feedback Loop

Taken together, these patterns suggest a positive feedback loop between skill level and frequency of use. It's a reminder that generative AI skill-building is not simply a matter of learning features from a manual; it's learning through repeated usage, refining prompts and approaches to get better results over time. For organizations and educators, this suggests that tangible, recurring use cases serve as the best catalysts for skill development.

Advanced+ Users: Deep Integration into Workflows

Frequent AI use:

52%

use it daily/weekly:
25% daily,
27% weekly.

For the smaller yet highly engaged advanced+ group (43 respondents), generative AI is far more than an occasional helper—it is an essential part of their toolkit. **Nearly 52% of these advanced users report using AI daily or several times a week (25% daily, 27% weekly)**. They typically apply it across multiple use cases, from writing long-form content and conducting detailed analyses to coding assistance and complex image creation.
At this level, indifference toward generative AI further declines—only 2.3% of advanced users state that it has had no impact on their lives.

Generative AI is deeply integrated into the workflows of advanced users, with 90% using it for **professional productivity** at least occasionally—and **25% doing so daily**. However, only 60% cite productivity as their primary motivation. Surprisingly, entertainment emerges as the most common use case, with 94% of advanced users engaging with GenAI for leisure activities.

90%

PROFESSIONAL PRODUCTIVITY

This highlights a significant opportunity to develop and promote advanced AI-driven business applications that could attract and engage more users in professional contexts.

Clear Benefits of Using GenAI Actively

A clear pattern emerges across all skill levels: within each group, the share of non-active users closely aligns with the share of those who report no significant impact of generative AI on their lives. Conversely, this implies that simply engaging with AI in any capacity—even occasionally at a beginner level—tends to yield a noticeable impact and benefit their life.

03. Tool Preferences and Adoption Patterns

Generative AI adoption in the US follows distinct patterns, with users gravitating toward different tools based on their experience level and professional needs. While ChatGPT dominates as the entry point, more advanced users diversify their toolsets, integrating AI into both personal and professional workflows.

While awareness of GenAI tools is relatively widespread, the path from awareness to active usage follows distinct patterns that illuminate both the current state of adoption and likely future trends.

The Gateway Effect: Understanding Tool Adoption

82%
aware of ChatGPT existence

ChatGPT emerges as the clear gateway to the world of generative AI, with 82% of Americans aware of its existence. This remarkable brand visibility, however, translates into active usage for only 47% of those who know about the tool. This conversion rate represents a significant achievement in technological adoption, particularly for a tool that has been widely available for about two years.

ChatGPT boasted over 300 million weekly active users from all over the world.

Since its launch in November 2022, ChatGPT has experienced unprecedented growth. It reached 1 million users within just five days—a milestone that took platforms like Instagram 2.5 months to achieve. By January 2023, ChatGPT had surpassed 100 million users, making it one of the fastest growing consumer application in history. This rapid adoption continued, and by December 2024, **ChatGPT boasted over 300 million weekly active users from all over the world**, with users sending more than 1 billion messages daily (The Verge, 2024).

This exponential growth reveals ChatGPT's role as a primary entry point for individuals exploring generative AI technologies.

What's particularly telling is how this adoption pattern varies across different user segments. Among those who progress to become advanced users, 76% report awareness of multiple tools, and 45% actively use more than one tool regularly. This suggests that tool diversification is both a marker and a driver of user sophistication.

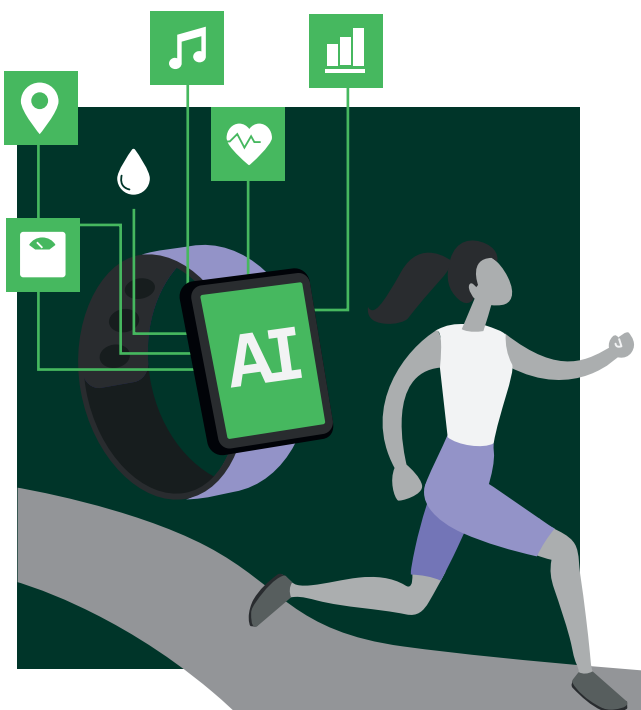
76%
aware of multiple tools

45%
regularly use multiple tools

The Hierarchy of Tool Preferences

As users progress in their GenAI journey, their tool preferences evolve

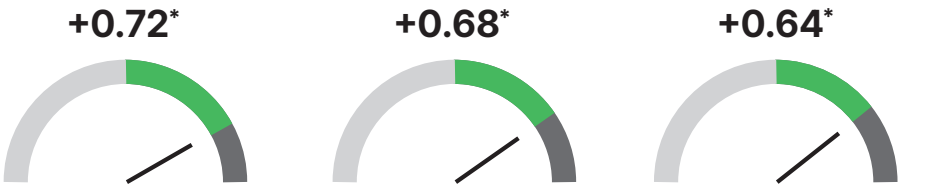
	TOOL PORTFOLIO BEGINNERS	TOOL PORTFOLIO INTERMEDIATE	TOOL PORTFOLIO ADVANCED
TEXT	89%	65%	60%
CODE/TECHNICAL	12%	24%	65%
IMAGE	14%	21%	60%
MUSIC/VIDEO	5%	21%	44%
	Focus on single-tool mastery Strong preference for user-friendly interfaces	Beginning to explore multi-tool workflows	Complex integration of multiple tools



While
89% of beginners use
at least one conversational model
(such as ChatGPT, Gemini, Claude, or Copilot),
only 51% explicitly identify a conversational model
as a generative AI tool they use. This highlights a lack of awareness within the beginner group regarding classification—they are using these tools without necessarily recognizing them as part of the broader generative AI category. Branding appears to be more intuitive to them than the underlying technology

The Education Effect

The relationship between education and tool adoption reveals important patterns about how GenAI is penetrating different segments of society. Users with college degrees show distinct patterns of tool adoption:



Higher likelihood of using multiple tools.

More rapid progression to advanced features.

Greater willingness to experiment with new tools.

*Percentage of Active Users (%)

However, this educational effect is not uniform across all tools. While ChatGPT demonstrates relatively democratic adoption patterns across education levels—showing only a **16% gap between the highest and lowest education groups**—more specialized tools exhibit much stronger educational correlations. For instance, Copilot has a 39% points gap in adoption rates between users with college degrees and those with only high-school education, likely due to its increased professional use among the white-collar workers.

Looking Forward: The Evolution of Tool Use

The data suggests that AI tool adoption is entering a new phase, characterized by increasing sophistication in how users combine and apply different tools. Several key trends emerge:

Future Indicators

01 Growing trend toward multi-tool usage

02 Increasing specialization in tool selection

03 Continuing wider access of basic tools

04 Rising importance of integration capabilities

Current trends

TOOL INTEGRATION
45% of advanced users regularly use multiple tools, indicating a maturing ecosystem where solutions complement each other.

SPECIALIZATION
As users gain expertise, they focus on specific needs—60.5% of advanced users concentrate on singular professional applications.

ACCESSIBILITY EVOLUTION
Despite technical barriers for advanced tools, user-friendly interfaces and clear use cases are broadening adoption across diverse groups.

04. Behavioral Patterns: How Americans Engage with GenAI

The way Americans interact with GenAI reveals distinct behavioral patterns that go beyond simple use statistics. They tell a story of an evolving relationship with AI technology, showing how different groups incorporate these tools into their daily lives and work routines.

Content Interaction Patterns

How users interact with AI-generated content reveals much about their overall relationship with the technology. Our research shows that **beginners, who make up the majority of users, often take a hands-off approach to AI outputs – 36.2% don't modify content at all**. This group primarily uses GenAI for personal purposes (54.3%) and shows limited daily engagement, with only 6.9% using it daily. Their behavior suggests a focus on basic information gathering and task automation rather than creative or professional applications.

43%

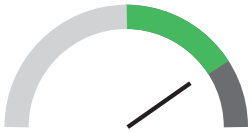
of non-modifiers are very unlikely to pay for premium features

As users gain confidence and begin incorporating GenAI into their professional lives, their interaction patterns shift significantly. **Intermediate users show more active engagement, with 55.2%** regularly modifying content and **44.8% using the technology weekly or daily.** This increased interaction correlates strongly with professional use – 65.7% of these users employ GenAI for both personal and professional purposes.

Advanced users demonstrate the most sophisticated interaction patterns, with 55.9% significantly modifying or completely reworking AI outputs. **This high level of content customization aligns with their predominantly professional use (60.5%) and frequent engagement – 41.9% use these tools daily or several times weekly.** Their willingness to pay for premium features (72.1%) further underscores how central these tools have become to their work processes.

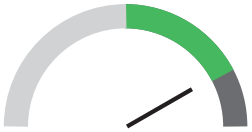
Content Interaction Factors

+0.68*



Professional use correlates with higher modification rates.

+0.72*



Regular usage increases modification confidence.

+0.64*

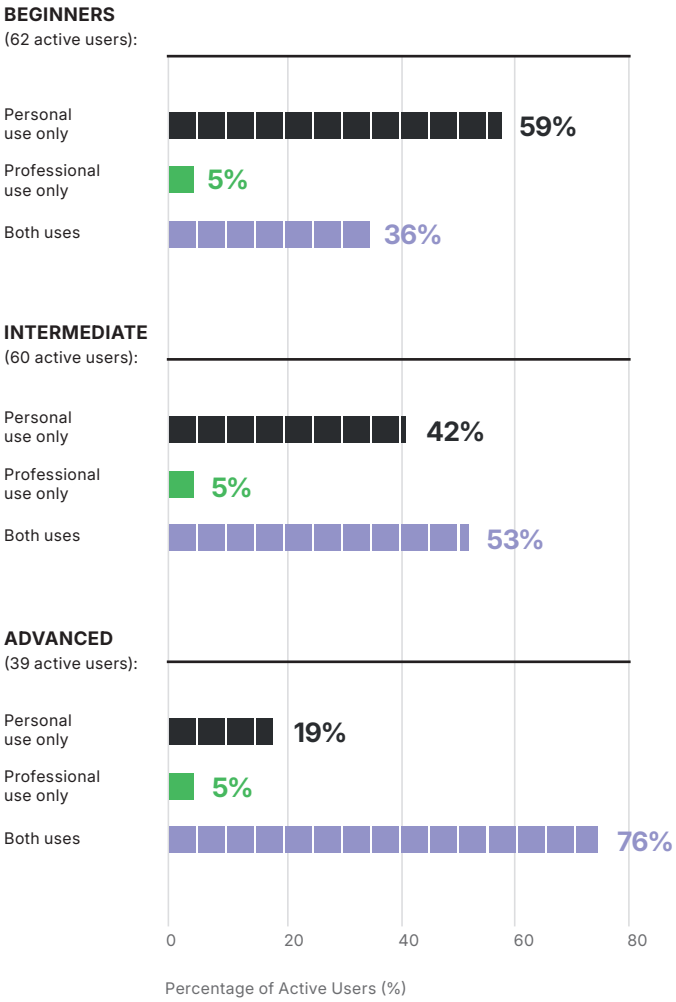
Willingness to pay correlates with content customization.

*Percentage of Active Users (%)

The Evolution of Work: How GenAI Transforms Professional Practices

68%
of active users report GenAI will significantly improve their work

The impact of GenAI on work methods reveals a fascinating progression, showing how users move from basic task assistance to deep professional integration. As experience with these tools grows, so does their role in shaping work habits, skill development, and career outlooks. The data suggests that this is not just about current usage but also about future expansion, as a majority of users—across all skill levels—plan to increase their professional reliance on AI.



Personal Matters

Regardless of whether users rely on a single tool or multiple tools, in 95% of cases, their generative AI usage also involves personal purposes. This means that even those who declare using highly specialized tools like Tabnine solely for professional tasks still balance their usage by incorporating another generative AI tool for personal matters. This pattern aligns with the fact that, across all skill levels, entertainment—a clearly personal goal—consistently ranks among the top 3 usage motivations.

Early Exploration: Personal Use as a Gateway

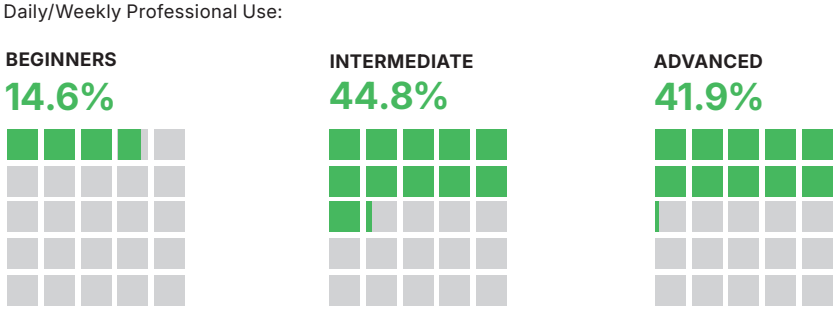
At the beginner level, GenAI adoption remains largely personal. Among beginners, who make up 55.5% of active users, 59% use GenAI exclusively for personal purposes, while 36% incorporate both personal and professional use, and only 5% rely on it solely for work. This suggests that workplace applications emerge gradually, with over a third already experimenting with professional use.

Looking ahead, beginners show growing but cautious interest in professional applications—54% are planning to expand GenAI use for work, while 42% are considering further AI learning, though 48% remain uncertain about its long--term career impact. This uncertainty highlights a need for clearer professional use cases and structured learning opportunities.

Intermediate Stage: The Shift Toward Work Integration

The transition to intermediate usage marks a significant shift in how GenAI influences professional life. These users, representing 32.1% of the active user base, display a much stronger integration of AI into work. The data reveals that 53% of intermediate users employ GenAI for both personal and professional purposes, while 42% still use it exclusively for personal tasks, and only 5% rely on it strictly for work.

At this stage, professional engagement grows naturally alongside personal familiarity, rather than replacing it. 44.8% of intermediates use GenAI several times a week or daily in their work routines, reinforcing its role as a key productivity enhancer. The majority of intermediate users (72%) plan to expand their professional use, while 65% are actively learning new AI skills, and 61% already recognize its importance for career growth. This suggests that for many, GenAI is no longer just an efficiency tool but an essential part of their professional development.



Advanced Users: Deep Integration and Future Expansion

The most profound impact appears among advanced users, who represent 12.4% of the active user base. At this level, 76% report using GenAI for both personal and professional purposes, while 19% rely on it exclusively for personal tasks, and just 5% use it solely for work. This challenges the assumption that AI adoption follows a strict professionalization path—even at the most advanced levels, personal use remains an integral part of engagement.

However, what distinguishes advanced users is their strong forward-looking approach:

88%

plan to further expand GenAI use in their professional work, indicating that they see AI not just as a tool but as a long-term necessity.

81%

are actively learning new AI skills, suggesting they recognize the need to continuously adapt.

74%

view GenAI as crucial for career advancement, the highest percentage among all groups.

In this group, 41.9% engage with GenAI daily or several times weekly for work, and 55.9% significantly modify and customize AI outputs, demonstrating deep integration into workflows. This level of sophistication moves beyond simple automation toward genuine workflow transformation, where AI is not just assisting but actively shaping decision-making and strategy.

72%

of advanced users are willing to pay for premium features, indicating strong professional value recognition.

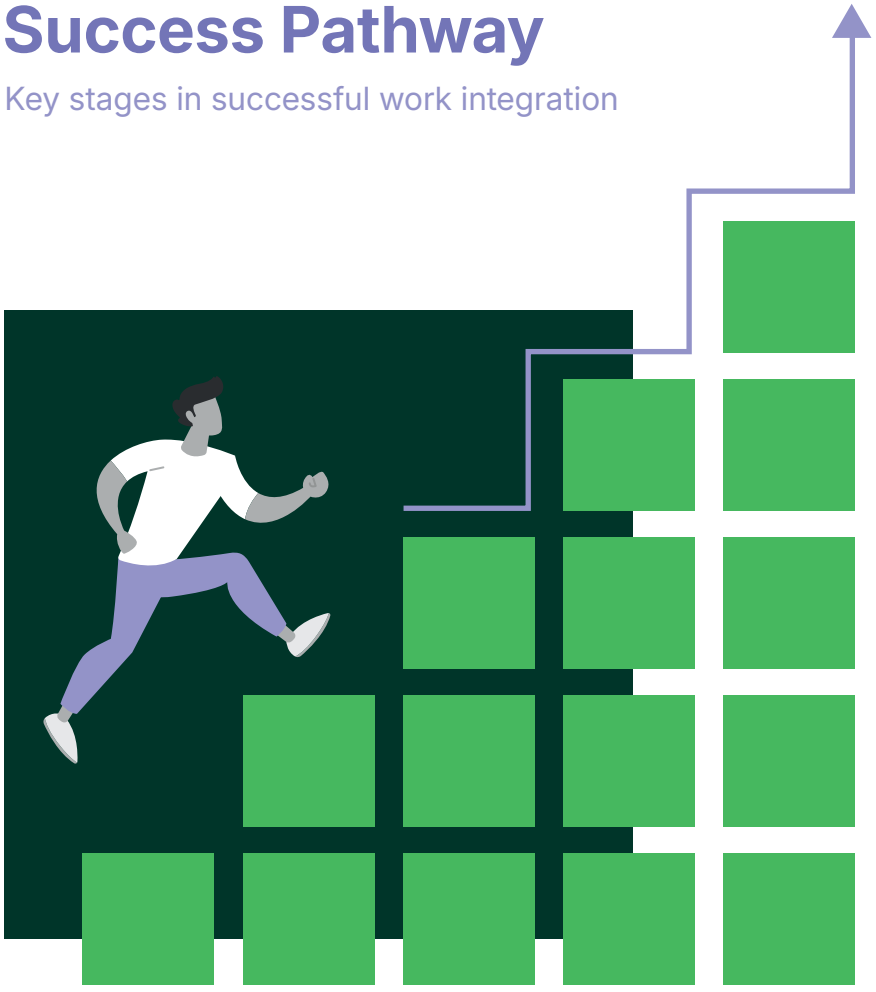
The Future of Work with GenAI

This progression from beginner to advanced use underscores a critical insight: GenAI adoption is not just about mastering features but about embedding AI into daily habits, workflows, and career strategies. The data reveals that regular usage (+0.74 correlation) and clear professional application (+0.68 correlation) are the strongest predictors of advanced integration.

The biggest challenge—and opportunity—lies in bridging the gap between early experimentation and professional mastery. Organizations and educators can play a pivotal role by providing structured learning opportunities, clear professional use cases, and incentives for skill development, ensuring that users at all levels can seamlessly transition from personal curiosity to meaningful professional application.

Success Pathway

Key stages in successful work integration



Exploration

Personal use builds foundation

Integration

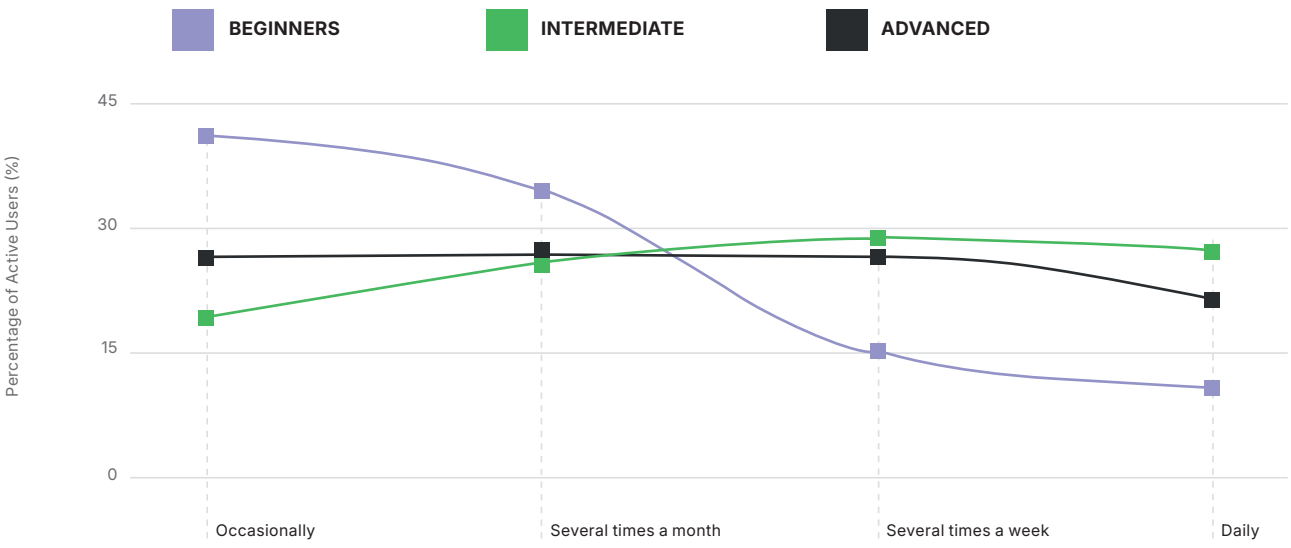
Regular use drives adoption

Innovation

Professional application catalyzes transformation

05. Usage Patterns & Purposes

From lighthearted experiments to enterprise-level integrations, GenAI is fulfilling a diverse spectrum of purposes. Our survey results reveal distinct patterns linked to skill level and professional context, underlining that what people do with AI is every bit as important as how often they use it.



How Experience Shapes AI Usage

The length of time users have engaged with GenAI affects how they use it. Long-term users apply AI in more complex ways, integrating it into their professional work, while newer users focus on basic features and personal use.

LONG-TERM USERS (1+ YEARS)

38%

More diverse tool use

More complex applications of AI

Stronger integration into professional work

72% report AI has transformed their workflow

ESTABLISHED USERS (6–12 MONTHS)

20%

Becoming more advanced

82% report AI has transformed their work processes

76% say their professional capabilities have expanded

68% see improvements in creative output

RECENT USERS (<6 MONTHS)

42%

Focused on basic features

Primarily using AI for personal tasks

More focused on learning rather than full integration

45% report moderate impact

What Are People Using AI For?

GenAI is being adopted for a variety of purposes, with younger professionals leveraging it for creative work and skill-building, while older users focus more on information access and personal assistance.

APPLICATION	Age group 18–34	35–54	55+
CONTENT CREATION	68%	45%	22%
PROFESSIONAL DEVELOPMENT	62%	52%	28%
RESEARCH & ANALYSIS	58%	58%	42%
LEARNING/EDUCATION	52%	48%	35%
PERSONAL ORGANIZATION	48%	45%	32%
CREATIVE PROJECTS	54%	42%	25%
INFORMATION GATHERING	52%	62%	72%
COMMUNICATION AID	45%	42%	38%
ENTERTAINMENT	42%	38%	42%

How AI is Transforming Different Fields

BEGINNERS	**48%** report improved basic task completion.	**42%** say AI enhances their information access.	**38%** find AI useful for personal productivity.
INTERMEDIATE	**65%** report better task efficiency.	**58%** say AI enhances work quality.	**52%** find their learning speed has increased.
ADVANCED	**82%** report AI has transformed their work processes.	**76%** say their professional capabilities have expanded.	**68%** see improvements in creative output.

The Multi-Tool Reality: How Different Groups Engage

AVERAGE NUMBER OF TOOLS USED

AGE 18–34
2.8
tools

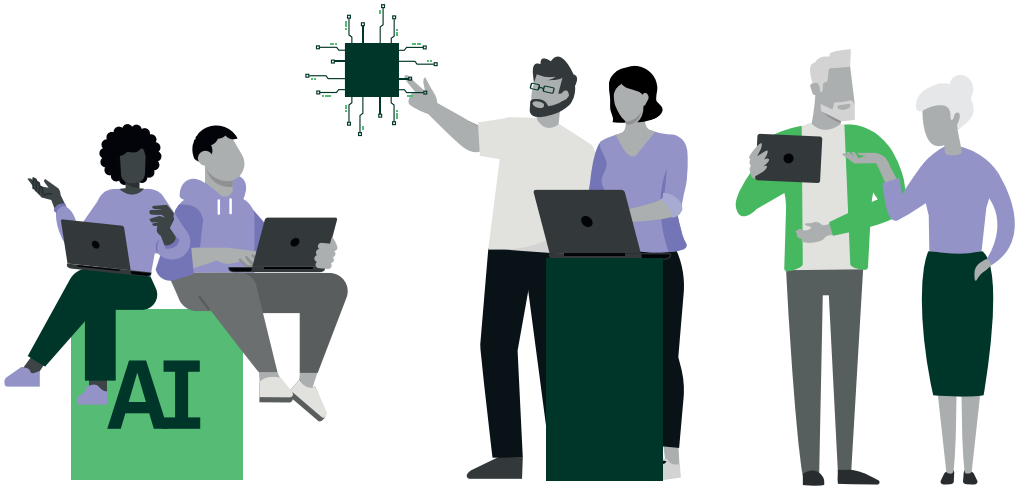
AGE 35–54
1.9
tools

AGE 55+
1.2
tools

The story of how users interact with multiple GenAI tools reveals a fascinating pattern of technological engagement that varies significantly across age groups. Our research shows that younger users demonstrate notably different patterns of tool adoption and usage compared to their older counterparts.

Generational differences in GenAI usage reflect varying approaches to experimentation and tool adoption. Younger users (18–34) tend to explore broadly, averaging 2.8 tools per user, leveraging different platforms for different purposes. Middle-aged users (35–54) take a more selective approach, averaging 1.9 tools, prioritizing clear utility over experimentation. Older users (55+) show the strongest preference for consistency, averaging 1.2 tools, focusing on mastering a single platform rather than diversifying. This progression suggests a shift from broad exploration to focused proficiency with age.

Multi-Tool Usage Patterns



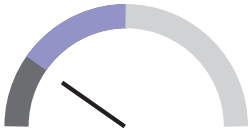
Younger users show highest tool diversity and experimentation.

Middle-aged users balance exploration with practical application.

Older users prefer mastery of fewer tools.

Age correlates strongly with willingness to experiment.

-0.68*



*Percentage of Active Users (%)

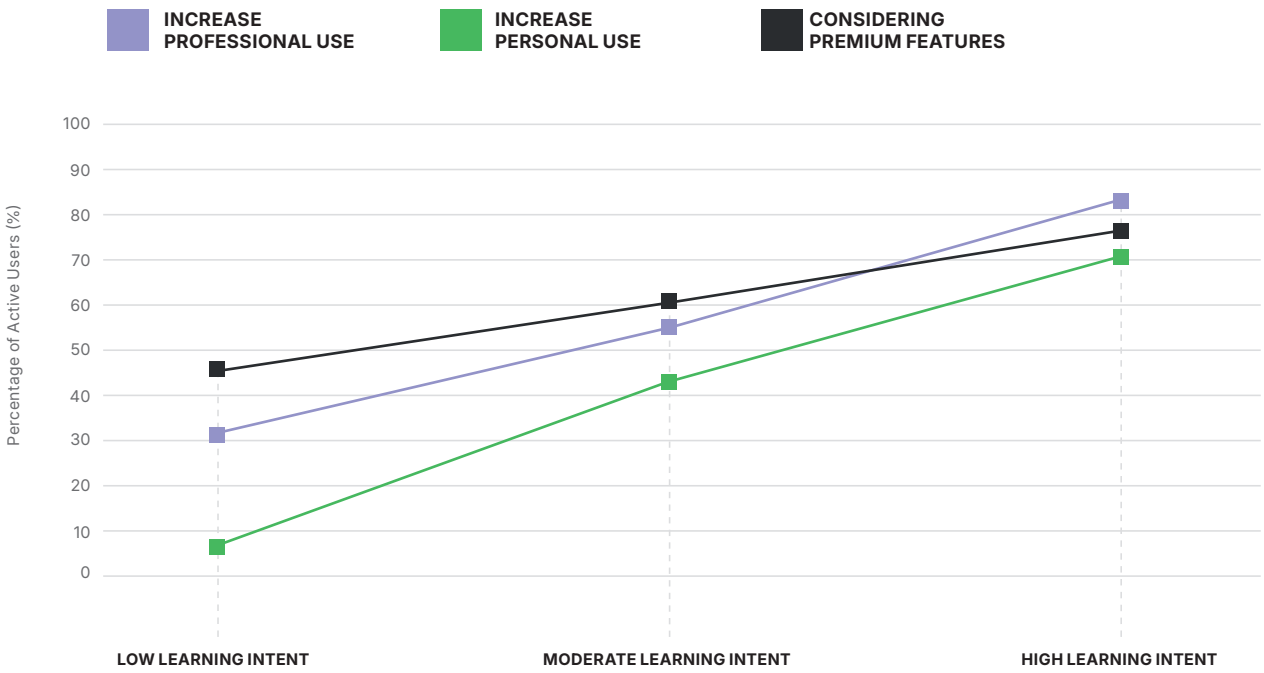
06. Looking Ahead: The Future of GenAI Adoption

While generative AI adoption in the US is steadily growing, significant barriers still prevent wider engagement. Concerns about security, trust, and the learning curve shape non-users' hesitation, even as awareness remains high.

The future outlook for GenAI adoption presents a study in contrasts, with current users and non-users showing markedly different perspectives on the technology's role in their future. These differing viewpoints, combined with clear behavioral patterns, provide insight into likely adoption trends.

Learning Intention vs. Future Usage Expectations

A strong correlation exists between learning intent and future usage expectations—extending even to the willingness to pay for premium features. This suggests that those motivated to learn are not doing so out of mere curiosity but with a clear goal of integrating GenAI more deeply into their work or personal routines. Their commitment goes beyond just investing time and effort in the learning process; they also recognize the value of premium features as a means to enhance their practical application of AI. This willingness to invest shows their expectation that GenAI will become an essential, long-term tool in their workflow.



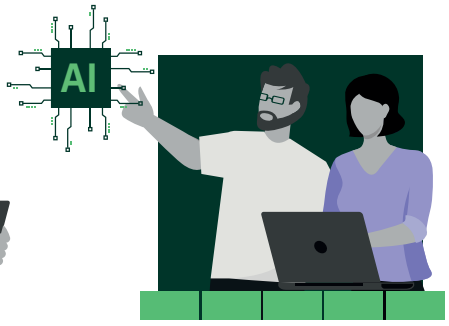
Among active users, experience with GenAI correlates strongly with optimism about its future impact. A striking 68% of current users believe AI will significantly improve their work and life, with this confidence showing clear progression across usage levels. This optimism manifests in concrete intentions–72% plan to increase their use of GenAI, and 61% believe it will become essential in their field.

Not only skill level but also age continues to play a crucial role in future outlook, but with some surprising nuances:

YOUNG USERS (18–34):

48.5% are intermediate or advanced users

Most diverse in planned applications



MIDDLE-AGE USERS (35–54):

26.3% are intermediate or advanced

Strong focus on professional development

Clear purpose-driven future plans

OLDER USERS (55+):

Lower current adoption but increasing interest

Focus on specific use cases

Growing recognition of necessity

> **AI will soon be as fundamental to business as the internet itself.** Google Report 2025

Key Future Indicators

01 Professional necessity remains strongest adoption driver.

02 Experience correlates positively with future investment.

03 Learning intentions predict engagement levels.

04 Age impacts adoption speed but not long-term commitment.

The Enterprise Impact

The future of GenAI adoption appears particularly promising when viewed alongside enterprise trends. Google's 2025 report indicates that 85% of businesses using AI expect a positive return on investment within three years, with AI-driven automation cutting costs by up to 40% in some industries. This organizational commitment to AI technology is likely to accelerate individual adoption, as more workers encounter these tools in professional settings.

The Non-User Perspective

Among non-users (52.4% of the total sample), around 45% describe themselves as interested but hesitant, predicting they "might need to learn AI eventually" for professional reasons. Their concerns center on:

82%

SECURITY AND PRIVACY
Echoing active users, but often with heightened skepticism or lack of trust.

68%

FEAR OF MISUSE
Many worry about unethical or harmful use of AI—be it job automation or manipulation via deepfakes.

64%

LEARNING CURVE
They question the time and of picking up AI skills if the benefits remain unclear.

52%

COST BARRIERS
Users hesitate to invest in AI tools or premium features without clear evidence of long-term value.

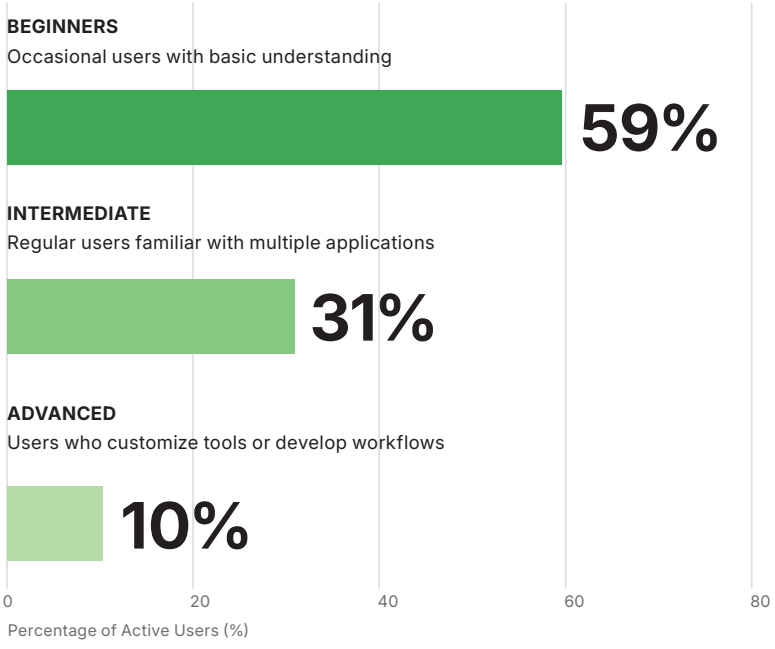
Yet, even within this group, pockets of positivity exist. Non-users who consider themselves "tech curious" (21%) express an eventual willingness to try AI if they see more transparent data policies and practical tutorials that prove AI's immediate relevance.

UNITED KINGDOM

When examining skill levels, the contrast between users and non-users becomes more pronounced. Among active users, 59% identify as beginners with basic functional understanding, 31% consider themselves intermediate users with regular usage patterns, and 10% qualify as advanced or professional users capable of customization and complex workflows. Conversely, the non-user population consists almost entirely of individuals aware of generative AI but who haven't used it (94%), with the remainder being completely disconnected from these technologies. This skill distribution suggests the UK is experiencing a significant confidence gap, where knowledge of generative AI is widespread but substantial barriers to actual adoption remain for over half of the population.

ACTIVE USERS

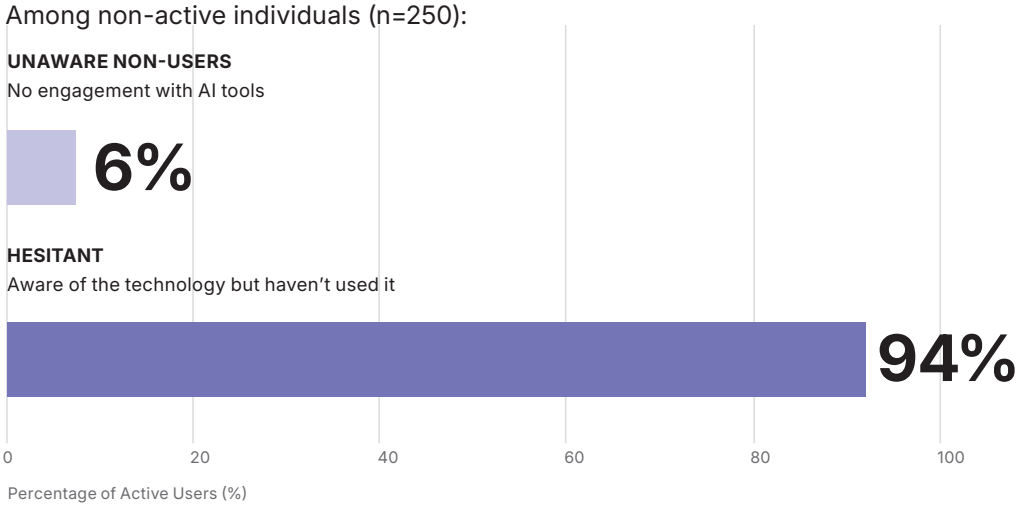
48%



52%

NON-ACTIVE USERS

Among non-active individuals (n=250):



01. The Digital Divide: Who's Using AI in Britain?

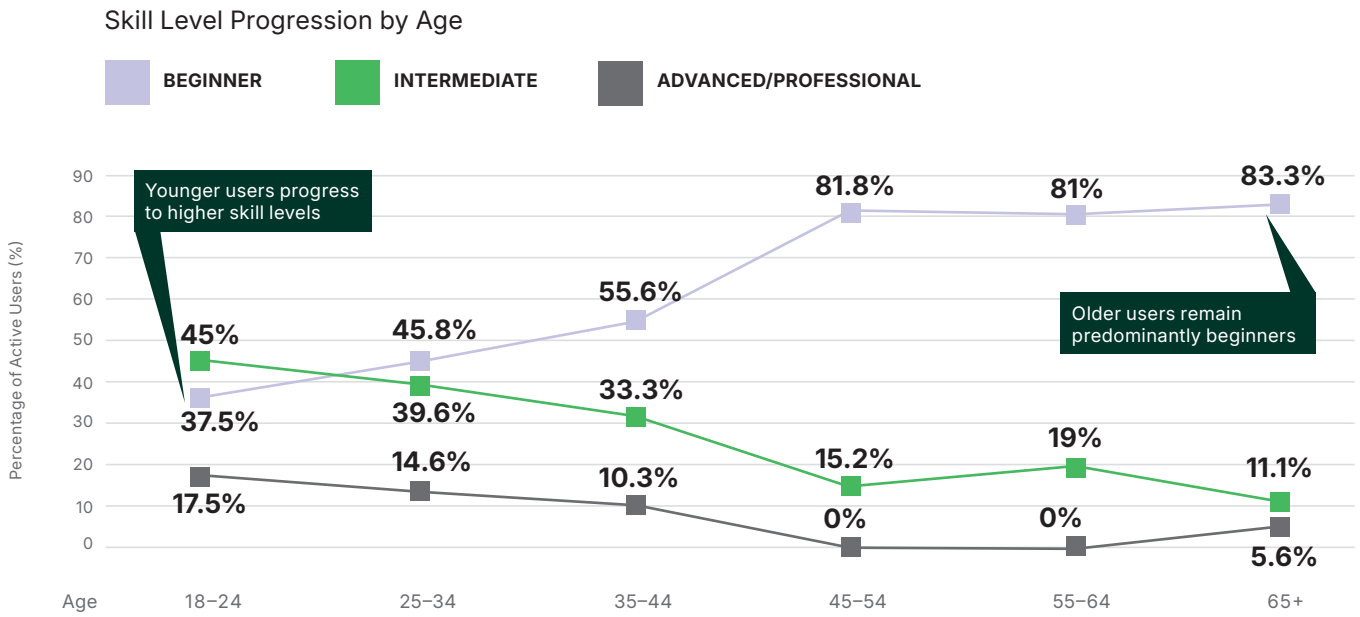
Nearly half (48.2%) of UK respondents actively use generative AI tools, revealing a population that's rapidly embracing this technology. However, adoption isn't uniform across the country, with clear demographic patterns emerging.

Age Gradient: The Youth Advantage

96%

adoption rate of the youngest age group

The UK's generative AI adoption is driven by a strong youth advantage, with the 18–24 age group showing near-universal adoption (95.7%) and the highest share of advanced users (17.5%). In contrast, adoption drops sharply among older demographics, with just 13% of those aged 65–74 using GenAI.
This generational divide suggests that while AI is becoming second nature for younger Britons, closing the gap among older users will require targeted efforts in accessibility and education.



Generation Gap

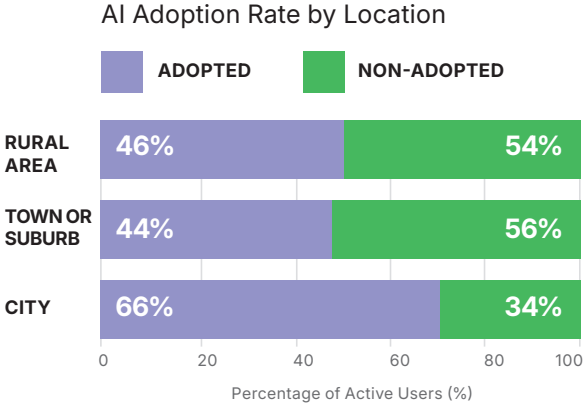
The active user base skews younger, with 63.8% under age 45, the 18–24 age group shows near-universal adoption (95.7%) and the highest proportion of advanced users. The adoption rate drops dramatically after age 65–only 9.0% of active users are 65 or older.

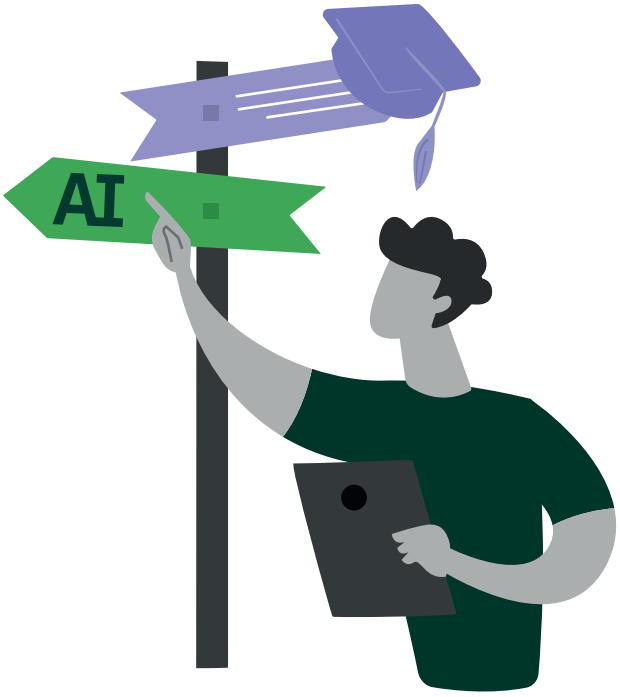
The Urban Advantage

Location plays a significant role in AI adoption across Britain:

RURAL AREA	TOWN/PERIPHERY	CITY
45.9%	44.2%	65.7%

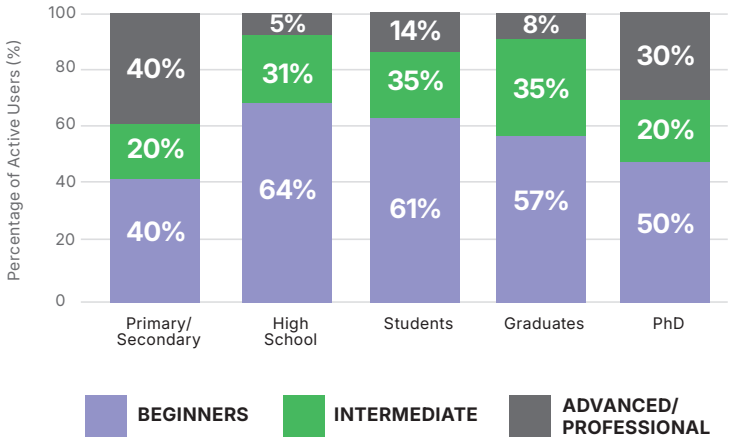
Location significantly influences adoption patterns, with **city dwellers being 43% more likely to use generative AI** than their rural or suburban counterparts (65.7% adoption in cities vs. 45.9% in rural areas). This urban advantage extends to skill level, with 10% of city users reaching advanced/professional status compared to just 3.5–4.7% in other areas.





The presence of advanced users with only high school education (20% of all advanced users) suggests alternative pathways to generative AI use exist outside traditional higher education.

AI Adoption Rate by Education



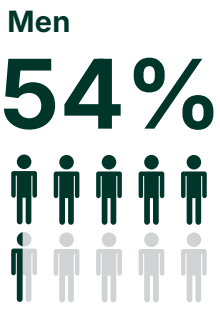
Education as Gateway

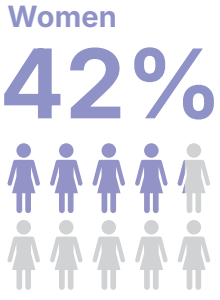
Education level strongly correlates with both adoption and sophistication of use, with **58.8% of those with graduate education using AI** tools compared to just 27.6% of those with primary/secondary education. While PhD holders don't have the highest overall adoption, they have the highest proportion of advanced users (30%).

Gender Dynamics in Transition

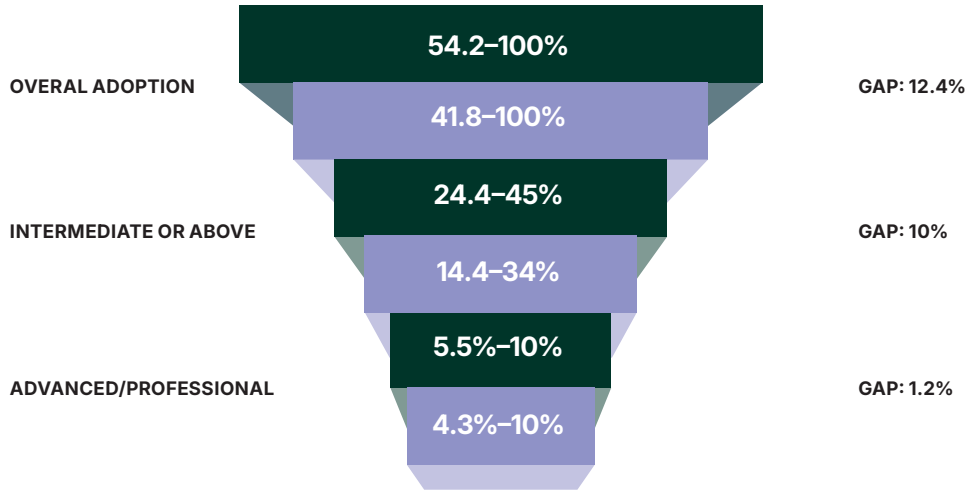
A clear gender gap exists in generative AI adoption (54.2% of men vs. 41.8% of women), yet the estimated use sophistication gap **narrows substantially at higher skill levels**. Among beginner users, the gender ratio approaches parity (50.8% male, 48.3% female), while among advanced users, women represent a substantial 45%–signaling that once women adopt these technologies, they progress to advanced use at similar rates to men.

Men are nearly twice as likely as women to have intermediate or advanced AI skills: **24.4% vs 14.4%**





Gender Gap in the UK: Generative AI Adoption by Skill Level



02. The Beginner User Profile: Mainstream Adoption in Action

Beginner users form the backbone of generative AI adoption in the UK, making up 59.3% of all active users and representing the clearest sign of mainstream uptake. Unlike early adopters who explore AI's advanced capabilities, beginners primarily engage with these tools for simple tasks, curiosity, or basic productivity. Their demographic diversity—spanning various age groups, education levels, and locations—signals that AI is no longer confined to tech enthusiasts but is becoming an everyday tool for a broad segment of British users.

Unlike the small segment of advanced users (4.8% of respondents), beginner users represent the largest group of active AI users in the UK, making up 59.3% of all active users and 28.6% of total respondents. This substantial group offers valuable insights into how generative AI is being adopted by mainstream British users.

Age

Beginners Among Active Users by Age

83% **Older adults (65+) are the most likely to be beginners** (83.3% of active seniors are beginners).

81% Middle-aged users show similar patterns: 81.8% of active 45–54-year-olds and 81.0% of active 55–64-year-olds are beginners.

37.5% Younger users are much less likely to be beginners: only 37.5% of active 18–24-year-olds are beginners.

Older adults are concentrated at the beginner level, with very few at intermediate or higher levels.

Education

Beginner users come from varied educational backgrounds:

33.9% Graduate education: 33.9% (compared to 45% of advanced users)

21.2% High school education: 21.2% (compared to only 10% of advanced users)

18.6% College graduates

17.8% Some college

8.5% Other education levels

This diversity indicates that basic AI literacy is not limited to those with higher education credentials, reflecting a more democratic pattern of adoption.

Living Area

Unlike advanced users who are predominantly urban, beginner users are more evenly distributed across location types:

58% Towns and suburbs

22% Rural areas

20% Cities

This geographic spread suggests that basic AI skills are penetrating beyond technology hubs into suburban and rural Britain.

Gender

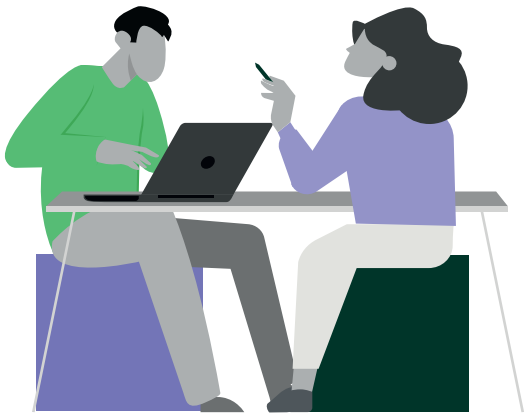
The gender distribution among beginner users approaches parity:

50.8% Male

48.3% Female

0.9% Other/undefined

This near-equal gender split contrasts with both historical technology adoption patterns and the still-present gender gap at advanced skill levels.



The Significance of the Beginner Majority

The beginner user profile reveals important insights about the state of AI adoption in the UK:

01 **Democratization in action:** The diverse demographic spread suggests generative AI is moving beyond early adopters and tech enthusiasts toward mainstream use.

02 **Age-related skill ceiling:** The data shows that while older Britons are adopting AI tools, they are significantly more likely to remain at the beginner level. Among active users aged 65+, over 80% are beginners.

03 **Education pathways:** While higher education correlates with advanced usage, the substantial representation of users with only secondary education suggests formal credentials are not a barrier to basic AI literacy.

04 **Geographic equality:** The relatively even distribution across location types indicates that basic AI skills are spreading throughout the UK, not just in technology-focused urban centers.

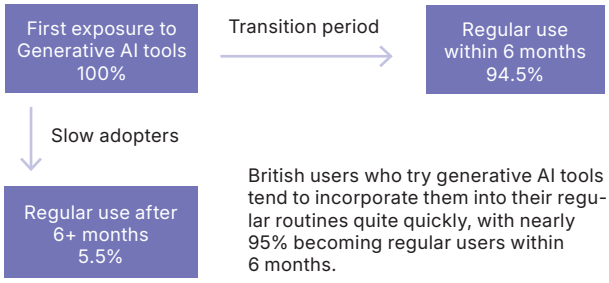
From Awareness to Action

The comparison between hesitants (aware but not using) and beginners reveals who crosses the threshold to actual use. Hesitants are significantly older (29.3% aged 65+ vs. 12.7% of beginners), less likely to have graduate education, and more predominantly female–highlighting the demographic barriers to initial adoption.

94.5%

of users begin regular use within maximum 6 months of first trying AI tools–suggesting high perceived value once the initial adoption barrier is crossed. This suggests that those who try them tend to adopt them quickly for regular use rather than abandoning after experimentation.

UK Generative AI Adoption Timeline



British users who try generative AI tools tend to incorporate them into their regular routines quite quickly, with nearly 95% becoming regular users within 6 months.

This demographic landscape suggests the UK is at a pivotal moment in AI adoption, with technologies rapidly spreading beyond early–adopter profiles. The challenge ahead lies in bridging remaining gaps across age, education, and geographic divides to ensure equitable access to these transformative tools.

Adoption Timing Analysis

The Gap Between First Try and Regular Usage:

Users with 6 months or less gap:
154 (94.5%)

Users with more than 6 months gap:
9 (5.5%)

This suggests most British users who try generative AI tools begin using them regularly within 6 months of first exposure.

First Tried vs. Started Using Regularly:

First tried in past month: 12
Started using in past month: 23

First tried in past 3 months: 26
Started using in past 3 months: 35

Non-users (never tried): 217
Non-regular users: 250

03. Who Is Still Hesitating? The Non-Users in the UK

Despite growing generative AI adoption in the UK, over half of the population remains on the sidelines. However, the vast majority of non-users (93.9%) are already aware of AI tools but have yet to take the leap, positioning them as “hesitants“ rather than completely unaware individuals. Understanding the demographics and barriers of this group is key to unlocking the next phase of AI adoption in the UK.

While half of the UK population has embraced generative AI, the rest still chooses not to engage.

Two Distinct Groups of Non-Users

The non-user population can be divided into two distinct segments:

3.1%

UNAWARE NON-USERS
Those with no awareness or recognition of generative AI tools

48.7%

HESITANT
Those aware of generative AI but who haven't yet used it

Nearly half of Britons are in a "waiting room" of AI adoption–aware of the technology but not yet engaging with it, representing a substantial untapped market for AI tools.

The Awareness Gap: Unaware Non-Users Profile

Unaware non-users show distinctive demographic characteristics:

Predominantly older:
61.5% are aged 65 or older

Lower educational attainment:
76.9% high-school education or lower

Rural concentration:
30.8% live in rural areas (compared to 20.6% of overall population)

Female skew:
69.2% female vs. 30.8% male

This group represents those most disconnected from digital innovation, with multiple demographic factors combining to create significant awareness barriers.

The Action Gap: Hesitant Profile

25.4%

MIDDLE-AGED CONCENTRATION
are aged 45–54, with another 29.3% aged 65+

23.4%

MIXED EDUCATION LEVELS
have graduate education, while 25.4% have high school–education

67.2%

SUBURBAN CONCENTRATION
live in towns/suburbs

54.2%

FEMALE MAJORITY
female vs. male (43.8%)

23.4%

The high proportion of graduate-educated hesitants suggests that education alone doesn't drive adoption–awareness needs to translate to perceived value and relevance.

AWARENESS IS NOT ALL YOU NEED

For many Britons, the gap isn't about awareness but about perceived relevance and value.
The critical conversion point isn't from unawareness to awareness, but from awareness to first use.

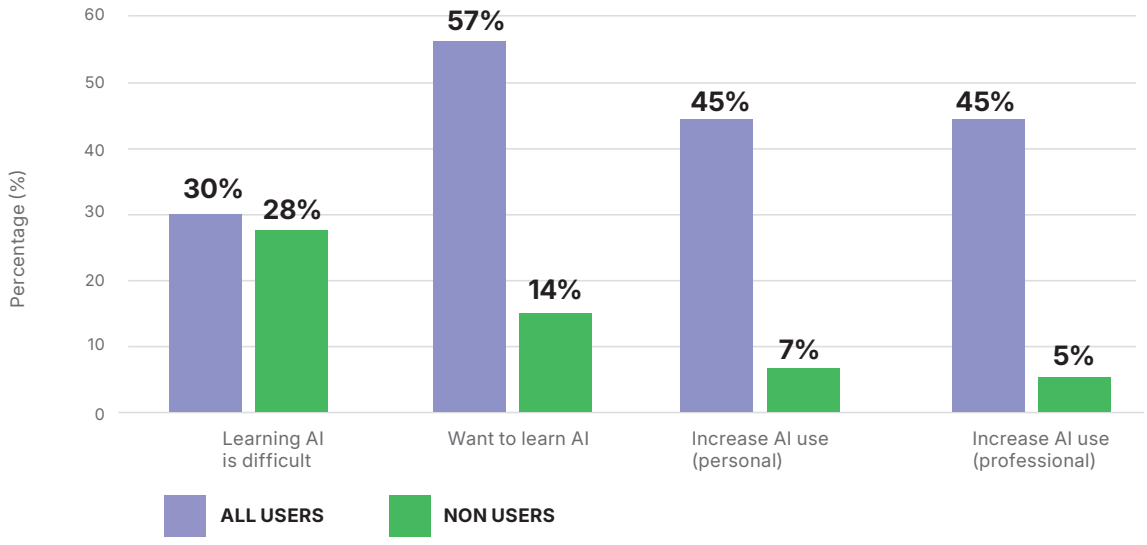
Barriers to Crossing the Comfort Threshold

01 The substantial drop in 65+ representation between hesitants (29.3%) and beginners (12.7%) suggests older Britons face significant hurdles in transitioning from awareness to use.

02 Rural hesitants appear less likely to become users than their urban counterparts, with cities showing particularly high conversion rates.

03 The shift from female-majority among hesitants to male-majority among beginners suggests women may face additional barriers or perceive less value in initial adoption.

04 The higher rate of graduate education among beginners versus hesitants indicates education may help overcome initial adoption barriers.



Despite their hesitation, many UK non-users are not entirely resistant to AI. While 72.6% admit they don't typically adopt new technologies early, a notable portion remains open to change—20.6% say they are somewhat likely to increase their AI use in personal life, and 24.4% express similar intentions for professional applications.

However, hesitation persists, with 39.5% unsure about integrating AI into their personal routines and 33.2% undecided about its role in their work. A key obstacle is the perceived difficulty of learning AI—28.8% of non-users agree that using generative AI tools is difficult, while 46.7% remain uncertain. These figures suggest that simplifying onboarding experiences and offering clearer guidance could help convert a significant portion of hesitant users into active adopters.

04. Tool Usage

Generative AI adoption in the UK is no longer limited to a single tool—while ChatGPT leads, a growing number of users are incorporating a wider range of AI applications. Tool preferences vary significantly based on skill level, with beginners relying on mainstream platforms, while advanced users experiment with more specialized solutions.

0 tools know

26.4%

109 users

1 tools know

22.5%

93 users

2 tools know

19.4%

80 users

3 tools know

1.6%

56 users

4 tools know

18.2%

75 users

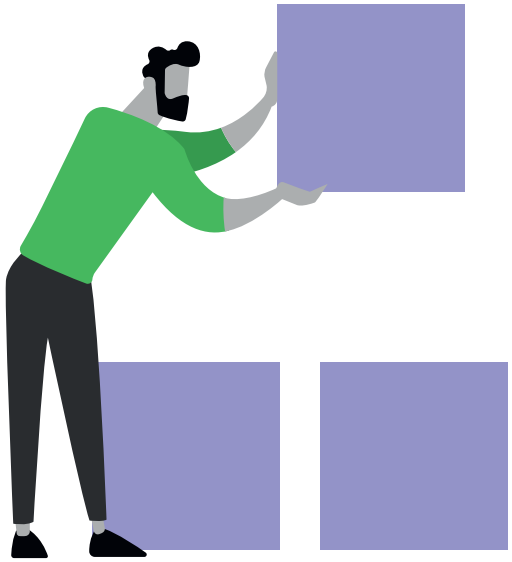
In the rapidly evolving world of generative AI, the United Kingdom remains a microcosm of technological transformation. While our previous analysis revealed that awareness is not the primary barrier—93.3% of non-users are already familiar with generative AI—the focus now shifts to those who have embraced the technology. In this section, we examine the depth of tool awareness among active users, exploring how their nuanced understanding and engagement with AI platforms shape their usage patterns and contribute to the broader landscape of adoption.

The Awareness Spectrum: Beyond Tool Recognition

The journey of AI tool awareness is anything but uniform. A closer examination reveals a critical insight that goes beyond simple tool recognition:

At first glance, these numbers might suggest widespread technological ignorance. However, a deeper narrative emerges. While 26.4% of respondents claim no knowledge of specific AI tools, this doesn't necessarily equate to complete technological unawareness. In fact, nearly **50%** of participants classified themselves as "hesitants" who have a **broader awareness of generative AI as a concept, but only half of them can associate it with specific tools like ChatGPT.**

This gap is crucial. It suggests that generative AI has permeated public consciousness far beyond tool-specific recognition. The average respondent knows 2.31 tools, but the real story lies in the cognitive landscape—where (at least declared) awareness of AI technology exists independently of tool familiarity. That would imply that it's less about technological resistance and more about a gradual, thoughtful approach to digital innovation.



Tool Popularity: More Than Just ChatGPT

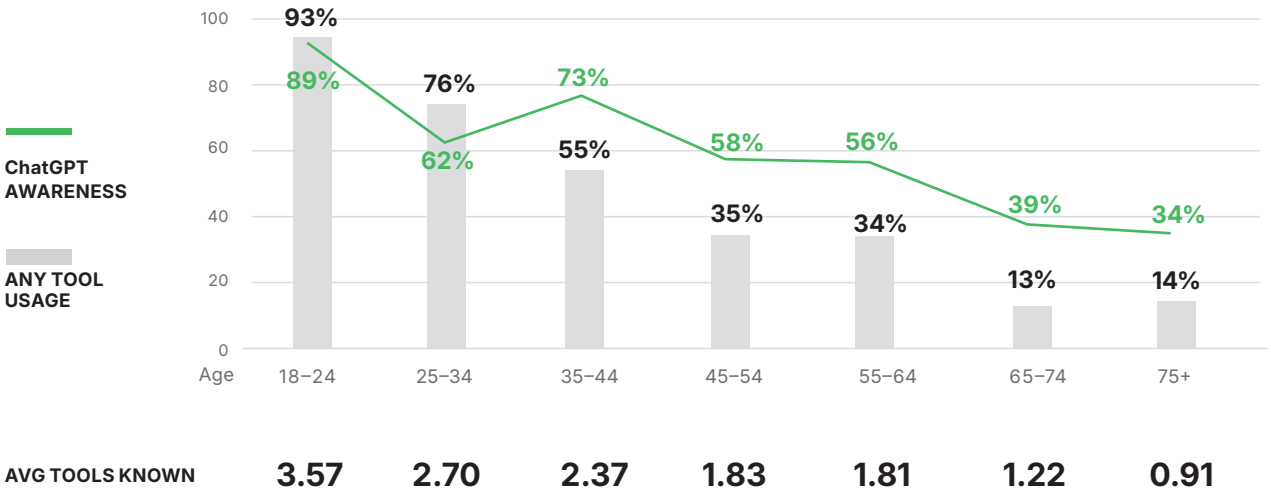
The generative AI ecosystem is far more complex than a single dominant player. Our analysis unveils a rich tapestry of tools, each carving out its unique space:

	AWARENESS	USAGE	CONVERSION RATE	CATEGORY
ChatGPT	**61%**	**35%**	**57.7%**	Language Model
Google Gemini	**37%**	**14%**	**38.1%**	Language Model
Microsoft Copilot	**35%**	**16%**	**46.9%**	Language Model
Adobe Firefly	**12%**	**5%**	**42.3%**	Image Generation
DALL-E	**10%**	**5%**	**51.2%**	Image Generation

While ChatGPT leads in awareness, the true story lies in the conversion rates and diversification. Specialized tools like Perplexity AI boast an impressive 64.3% conversion rate, and niche platforms are steadily gaining ground.

The Age of Digital Divide

Perhaps the most striking insight comes from our age-based analysis:



	18–24	25–34	35–44	45–54	55–64	65–74	75+
AVG TOOLS KNOWN	**3.57**	**2.70**	**2.37**	**1.83**	**1.81**	**1.22**	**0.91**

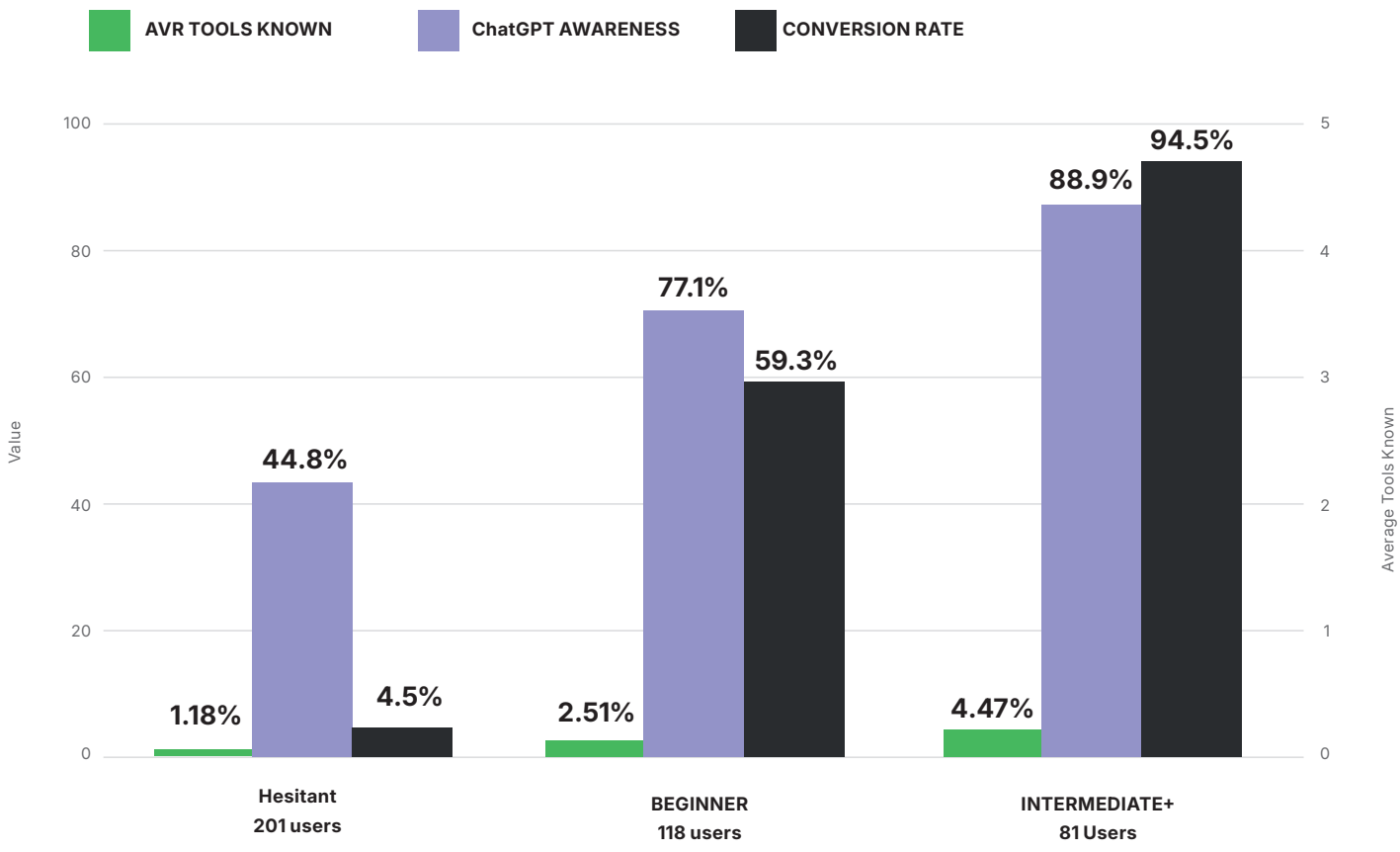
The generational gap is stark and undeniable. Young adults aged 18–24 demonstrate an almost symbiotic relationship with AI tools, knowing an average of 3.57 tools and boasting a remarkable 93.5% usage rate. In contrast, individuals over 65 show significantly lower awareness and adoption.

Skill Level: The Hidden Catalyst

Skill emerges as a critical factor in AI tool adoption:

SKILL LEVEL	AVR TOOLS KNOWN	ChatGPT AWARENESS	CONVERSION RATE
AWARE NON-USER	1%	45%	4%
BEGINNER	2%	77%	59%
INTERMEDIATE+	4%	89%	94%

The progression is remarkable. As users move from hesitant to professional levels, their tool awareness grows exponentially. The conversion rate skyrockets from a mere 4.5% for hesitants to a nearly 100% for intermediate+ users.



Multi-Tool Ecosystem: Beyond Single-Platform Loyalty

56%
use actively more than one tool

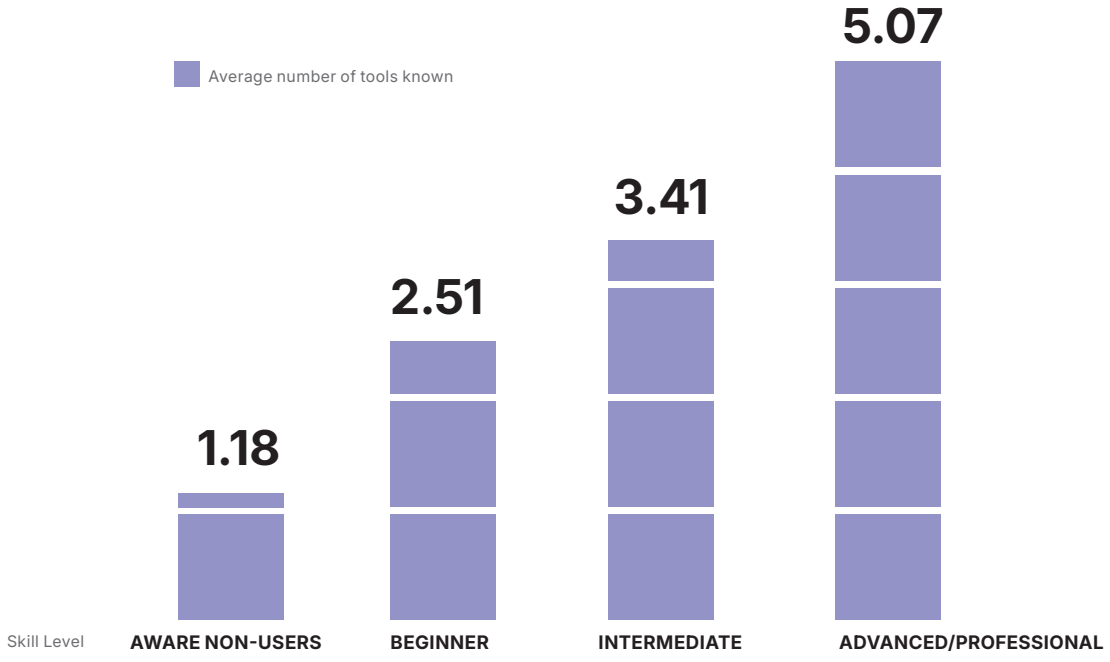
More than half of active users (56%) now use multiple AI tools, with some employing up to five or more platforms. The most common combinations reveal strategic tool selection:

ChatGPT + Copilot
51%
of multi-tool users

ChatGPT + Gemini
45%
of multi-tool users

Gemini + Copilot
31%
of multi-tool users

The relationship between skill level and AI tool awareness reveals how people gradually understand and engage with new technologies:



NON-USERS KNOW

1.18

TOOLS ON AVERAGE

For aware non-users, who make up nearly half of the respondents, AI tools are still largely unknown territory. They know about 1.18 tools on average, with less than half recognizing ChatGPT. Their awareness is limited, mostly stuck on basic language models. These users are just beginning to learn about AI, taking their first cautious steps into a new technological world.

ChatGPT RECOGNITION

77%

Beginners show a significant jump in understanding. Their tool awareness more than doubles to 2.51, with ChatGPT recognition rising to 77.1%. They start to see AI as more than just one tool, expanding their awareness across different types of AI applications. This is where curiosity starts to turn into real interest.

MULTI–CATEGORY AWARENESS

43%

Intermediate users dive deeper into the AI ecosystem. With 3.41 tools under their belt and 86.9% ChatGPT awareness, they're becoming confident explorers. Their multi-category awareness reaches 42.6%, showing they're actively looking beyond just language models. These users are no longer just watching from the sidelines but actively engaging with different AI technologies.

MULTI–CATEGORY AWARENESS

70%

Advanced and professional users represent the most sophisticated group. They know an average of 5.07 tools, with their multi-category awareness reaching an impressive 70.0%. Interestingly, their ChatGPT awareness is slightly lower than intermediate users; suggesting they're more selective and have a broader view of available tools.

This progression tells a clear story: learning about AI tools isn't about collecting information, but about developing a more comprehensive understanding of technology. As people become more skilled, they don't just learn more tools—they gain a deeper, more nuanced view of what AI can do.

The data shows a clear pattern: the more people learn about AI, the more they understand its potential. It's not just about knowing more tools, but about seeing how these tools can be used in different ways and across different areas.

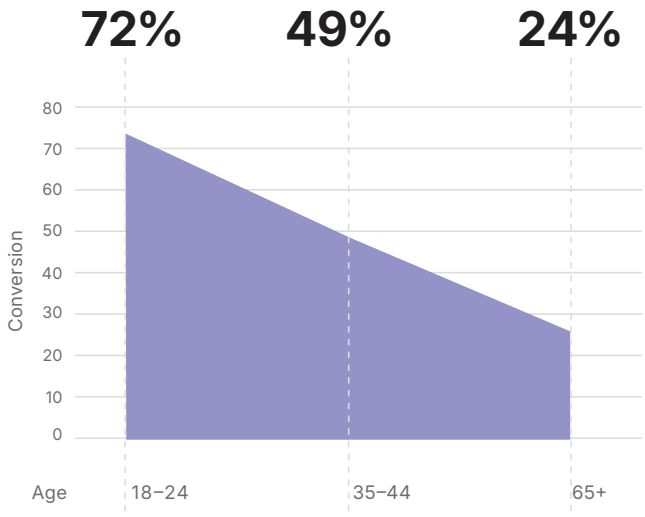
The Awareness Multiplier Effect

Key Discoveries:

Awareness creates a compounding effect:

Users knowing 4+ tools are 2.5x more likely to be active users

Only 72.2% are aware of language models, with awareness dropping dramatically for other categories.



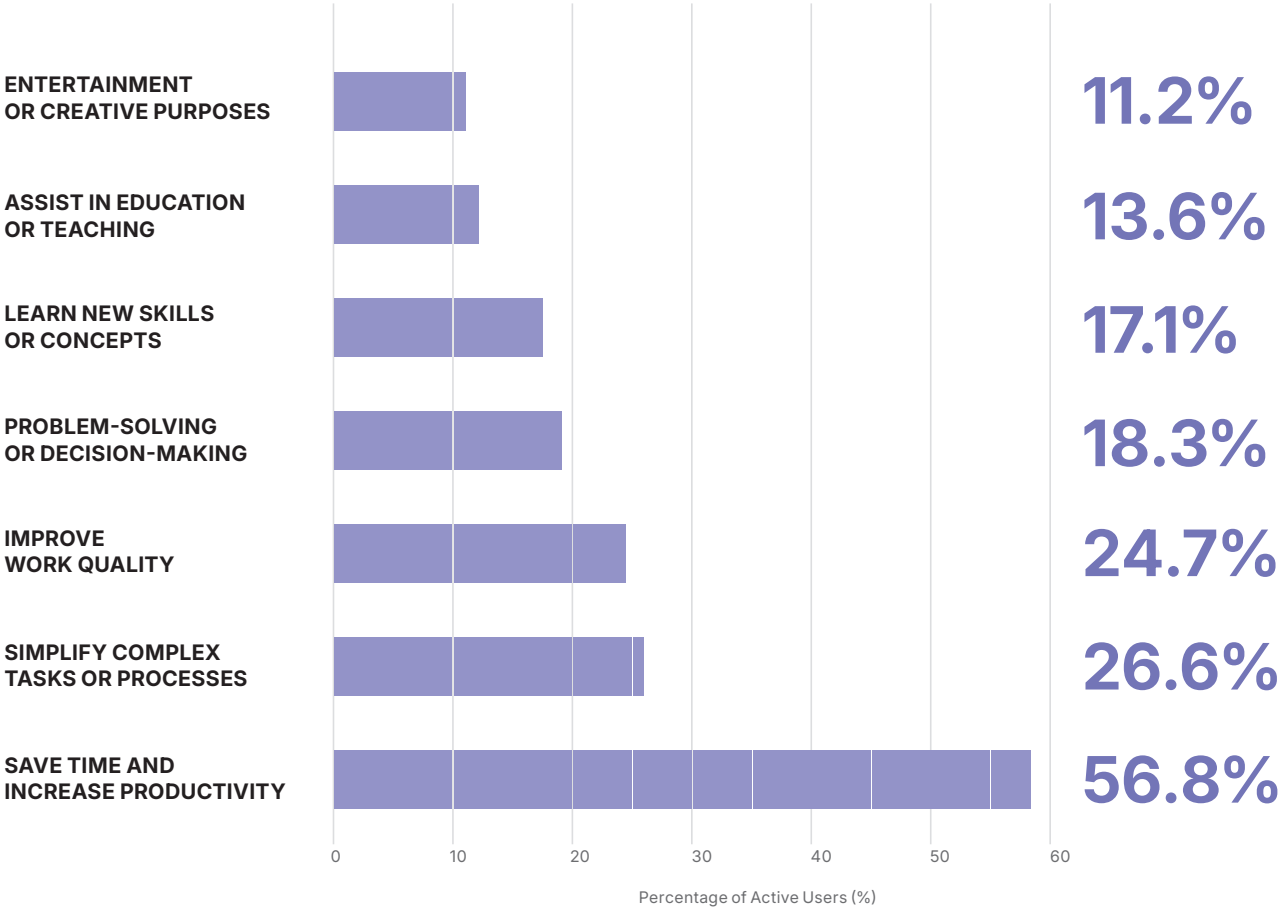
05. Motivations, Purposes and Impact of Generative AI

People in the UK are turning to generative AI for a mix of practical benefits and curiosity-driven exploration. While productivity and efficiency remain key motivators, many users also engage with AI for learning, creativity, and problem-solving.

Primary Motivations for Using Generative AI

Understanding why Britons turn to generative AI reveals the functional and psychological drivers of adoption in the market. The survey data identifies clear patterns in user motivation:

Primary Motivations for Using Generative AI in the UK



Productivity clearly dominates as the primary driver of adoption, with over half of active users citing efficiency gains as their main motivation. This pragmatic approach suggests UK users are primarily adopting AI as a functional tool rather than as a novelty.

Usage Purposes and Frequency

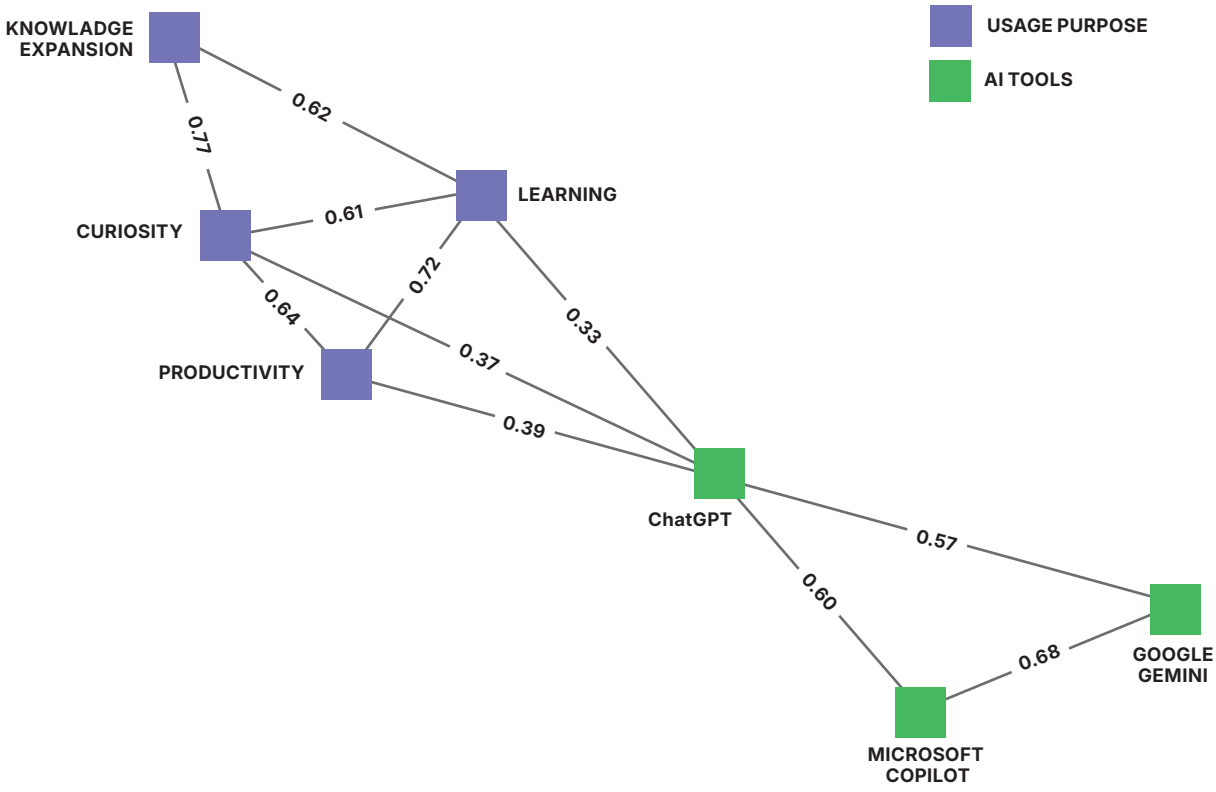
The specific ways in which Britons apply generative AI tools provides further insight into integration patterns:

	REGULAR USERS (AT LEAST MONTHLY USE)	OCCASIONAL USERS	NEVER USED FOR THIS PURPOSE
KNOWLEDGE EXPANSION	20.3%	16.5%	63.2%
CURIOSITY/ ENTERTAINMENT	20.6%	18.6%	60.8%
PROFESSIONAL PRODUCTIVITY	18.6%	10.7%	70.7%
CREATIVE INSPIRATION	17.9%	13.3%	68.8%
PREPARING DRAFTS	17.4%	12.1%	70.5%
NEW LEARNING FORMS	16%	9.7%	74.3%
PARTIALLY AUTOMATING TASKS	15%	13.8%	71.2%
FULLY AUTOMATING TASKS	12.6%	9.2%	78.2%
PERSONAL BRANDING	11.6%	6.3%	82.1%

What's particularly notable is the relatively low adoption of AI for full automation (12.6% regular users). This contradicts popular narratives about AI replacing human work, as most UK users are employing these tools to augment rather than replace their efforts–partially automating tasks (15.0%) or preparing drafts for later refinement (17.4%).

The Knowledge–Entertainment Nexus

The UK data reveals an interesting pattern: the top two use cases for generative AI–knowledge expansion and entertainment–are often intermingled. This suggests that British users frequently engage with AI in an "infotainment" mode, blending learning with leisure in ways that traditional educational or entertainment media cannot. This knowledge-entertainment nexus represents a unique value proposition that differentiates generative AI from older technologies.



Age Creates a Digital Divide

The data reveals significant age-related differences in generative AI adoption:

ChatGPT daily usage drops dramatically from 23.68% in the 18–24 age group to 0% in the 45+ brackets.

For Google Gemini, non-usage rates increase steadily with age: 41.67% (18–24), 51.72% (25–44), 82.61% (45–54), and 74% (55+).

Microsoft Copilot shows the most balanced adoption across age groups, though usage still declines with age.

ADVANCED
13.5%
INTERMEDIATE
15.7%
USE ChatGPT DAILY

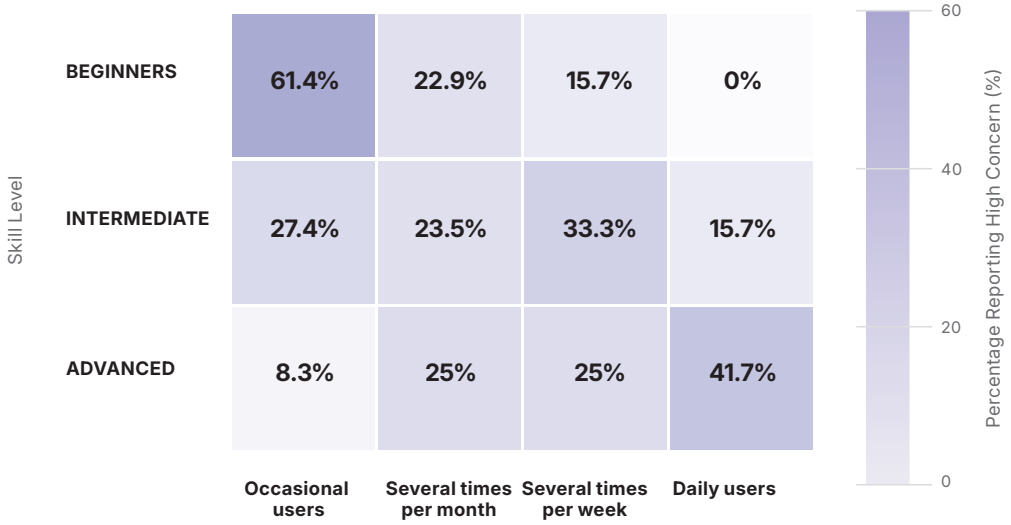
Skill Level Drives Usage Frequency

Our analysis shows a clear progression in how users engage with tools like ChatGPT as their expertise grows:

Among advanced/expert users, 41.67% use ChatGPT daily, compared to just 15.69% of intermediate users and none of the beginners.

Beginners predominantly use ChatGPT occasionally (61.43%), while only 8.33% of advanced users report occasional use.

ChatGPT Usage Frequency by Skill Level



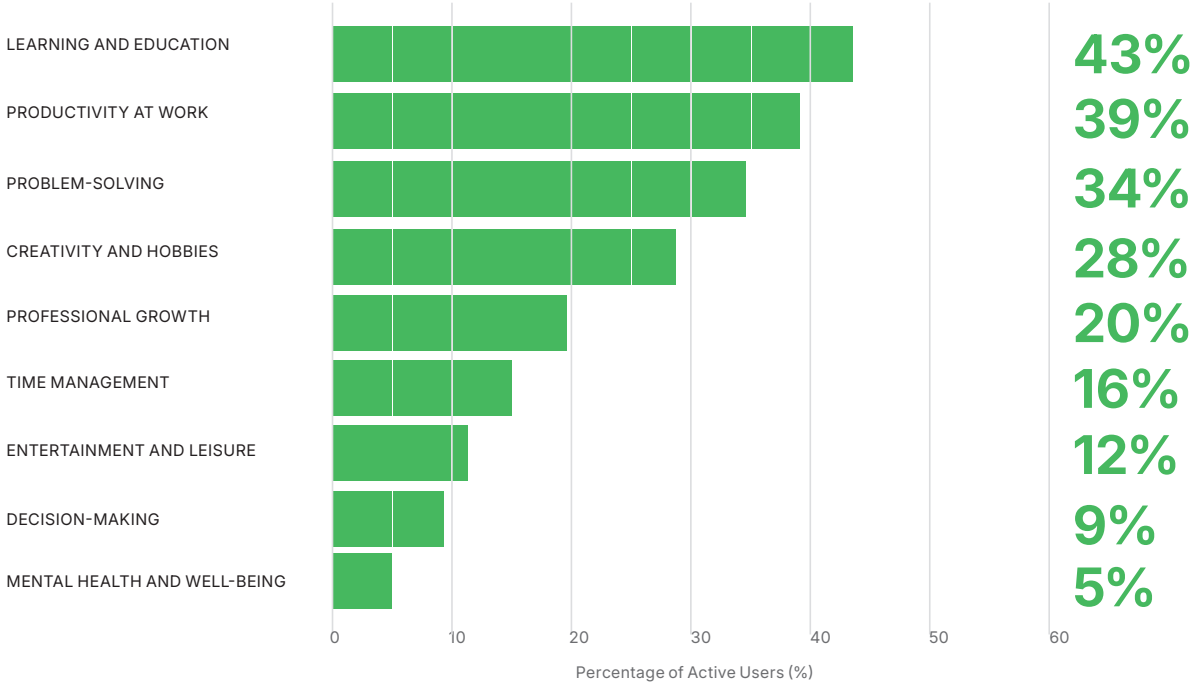
Gender Influences Usage Patterns

Gender differences in ChatGPT usage are particularly noteworthy: male users show more intense engagement patterns with 14.46% using ChatGPT daily vs. 6.45% of female users, while female users heavily favor occasional use 56.45% of active female users) compared to males (37.35%).

Among those who use AI tools, approximately 31% make moderate to substantial modifications to the generated content, while 16% use the output as-is. This suggests varying comfort levels with AI output quality, and potentially different use cases–with unmodified content likely serving informational needs, while modified content supports more creative or professional applications.

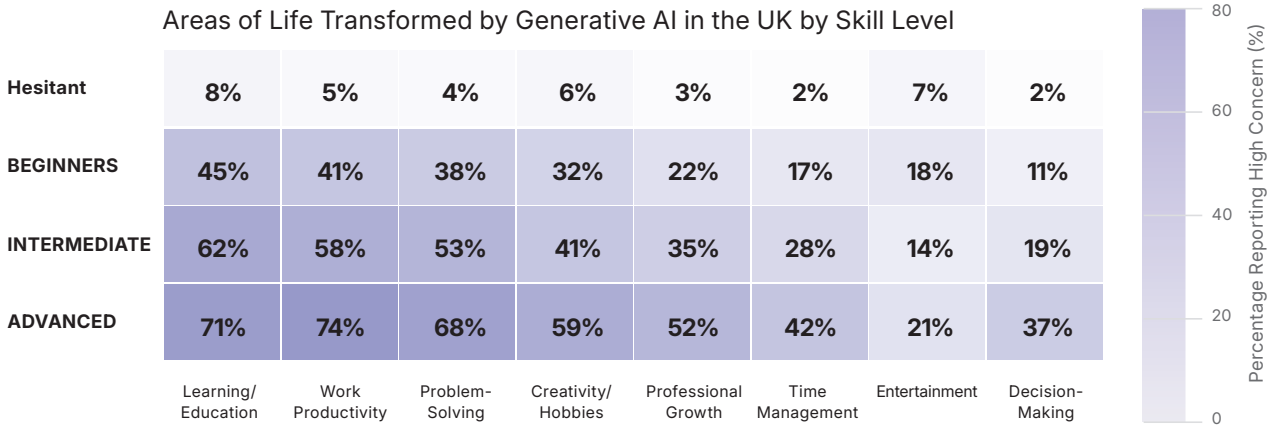
Areas of Life Transformed by Generative AI

Perhaps the most revealing is which aspects of users' lives have been most significantly impacted by generative AI tools:



The dominance of learning, work productivity, and problem-solving aligns with the primarily practical motivations of UK users. However, the significant impact on creativity and hobbies (28.1%) suggests these tools are also finding meaningful applications in personal expression and leisure activities.

Areas of Life Transformed by Generative AI in the UK by Skill Level

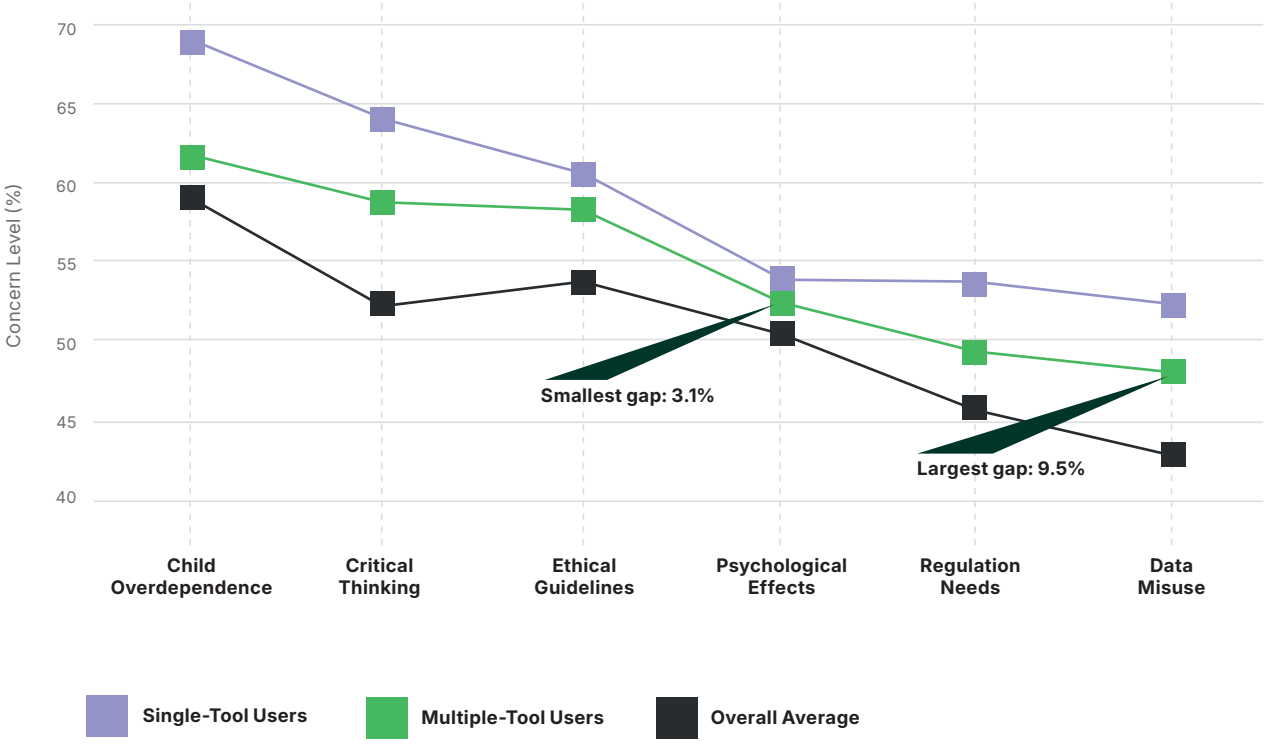


06. Concerns and the Future

While generative AI adoption continues to grow in the UK, many users remain cautious. Concerns over data privacy, ethical risks, and over-reliance on AI create hesitation, particularly among non--users. At the same time, a significant portion of both users and “hesitants“ express a willingness to learn and expand their AI use—provided that key barriers, such as security and ease of learning, are addressed.

Adoption Barriers

Alongside positive impacts, the survey identifies key concerns that may limit broader adoption:



01 CRITICAL THINKING IMPACT

The potential weakening of critical thinking skills due to generative AI worries 59.1% of all respondents. Again, a clear pattern emerges with single-tool users showing elevated concern (64.2%) compared to those using multiple AI tools (53.4%).

02 OVERDEPENDENCE WORRIES

63.8% of respondents express high concern about the overdependence of children and students on generative AI. This is the top concern overall, with single-tool users showing even higher worry at 67.5%, while multi-tool users register a lower but still substantial 59.2% concern rate.

03

ETHICAL AND GOVERNANCE ISSUES

58.3% of respondents believe ethical guidelines for generative AI tools need to be more transparent. The need for stronger regulation is a concern for 49.9% of users, with a notable gap between single-tool users (53.1%) and multi-tool users (46.2%).

04

PSYCHOLOGICAL AND PRIVACY CONCERNS

Long-term psychological effects of AI–human interactions worry 52.9% of respondents, with relatively similar levels of concern between single-tool (54.3%) and multi-tool users (51.2%)–the smallest gap among all concern categories. Personal data misuse shows the largest divergence in concern levels, with 48.2% overall concern, but a substantial 9.5 percentage point gap between single-tool users (52.6%) and multi-tool users (43.1%).

THE TOOL USAGE EFFECT

Across all categories, users of multiple AI tools consistently express lower levels of concern than those using just one tool. This suggests that increased familiarity and experience with various AI technologies may reduce anxiety about their potential negative impacts. The difference is most pronounced in concerns about personal data misuse and least significant regarding long-term psychological effects.

Attitude Toward Future Use

The survey also reveals strong signals about future adoption intentions:

I will increase my use of generative AI in my personal life

48.3%

I will increase my use of generative AI in my professional life

51.9%

I want to learn more about new generative AI tools

59.5%

These forward-looking indicators suggest continued growth in the UK market, with a slight preference for professional over personal applications, though both show substantial growth potential.

Younger users expanding AI use:

personal

87%

professional

89%

87%

users willing to pay for premium AI features

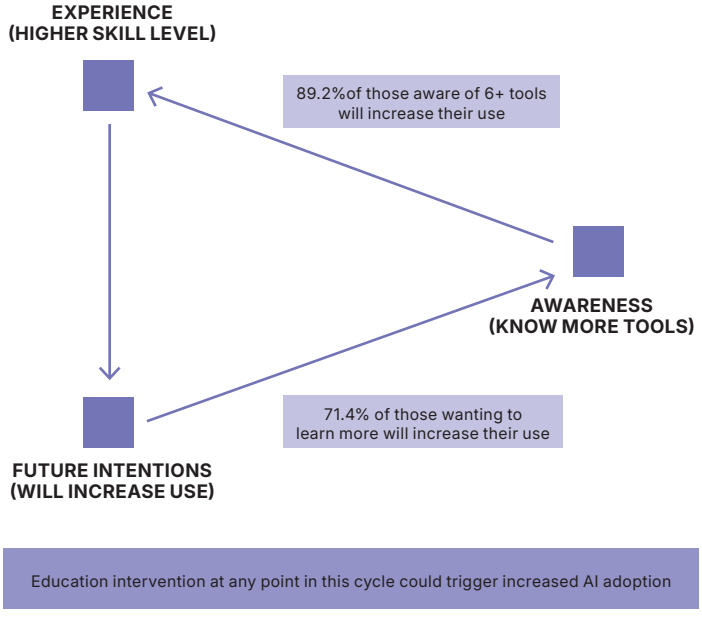
Our analysis of future AI use intentions in the UK reveals a striking pattern: awareness, experience, and willingness to engage with AI are the strongest predictors of increased adoption. Younger individuals, particularly those aged 18–24, demonstrate the highest likelihood of expanding both personal (87.0%) and professional (89.1%) AI use, while adoption intentions decline significantly with age.

Skill level is another key factor, with AI professionals unanimously planning to increase their use, compared to just 29.9% of hesitants. Notably, the shift from hesitant to beginner results in a 33.7 percentage-point jump in future AI adoption, emphasizing the power of hands-on exposure.

Awareness plays a similarly crucial role—those familiar with six or more AI tools are nearly six times more likely to increase their AI use than those with no awareness (89.2% vs. 15.3%). Willingness to pay for premium AI features also strongly correlates with future adoption, with 87.5% of those "very likely" to pay planning to expand their use.

Geographic location shows a more moderate effect, with urban residents more inclined toward AI adoption (65.7%) compared to suburban (42.2%) and rural (41.2%) users. Additionally, belief systems significantly shape future intentions: individuals eager to learn more about AI tools are up to nine times more likely to increase usage, whereas concerns about data misuse and AI decision-making correlate with decreased adoption.

The Knowledge–Use Loop: A Self-Reinforcing Cycle



A reinforcing knowledge-use loop is evident—those who know more AI tools are more likely to use them, leading to greater learning interest and further adoption. This suggests that targeted educational initiatives could accelerate AI adoption across demographics, fostering a self-reinforcing cycle of engagement.


SPAIN

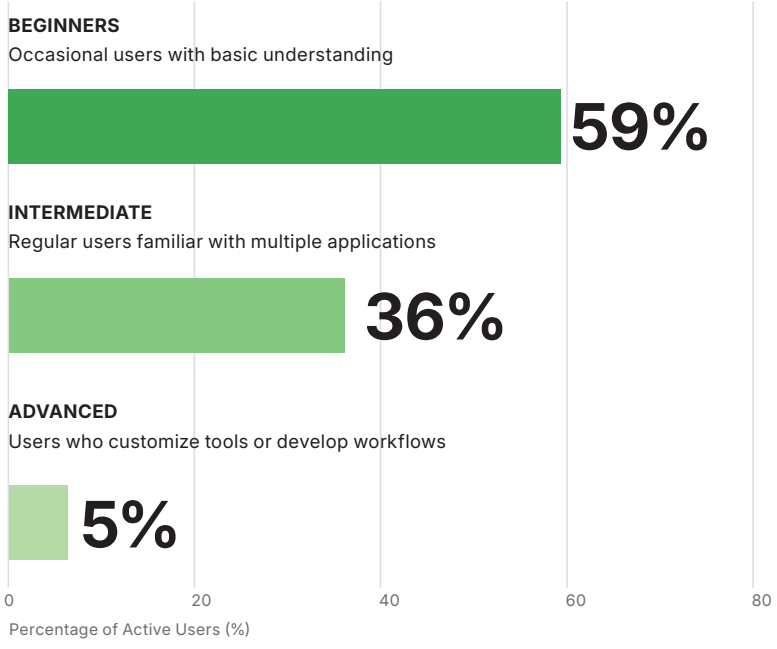
Adoption Overview

Overall, 40% of respondents declare that they actively use generative AI tools, while 60% are non-active. This divide reveals important segmentation within the Spanish market:

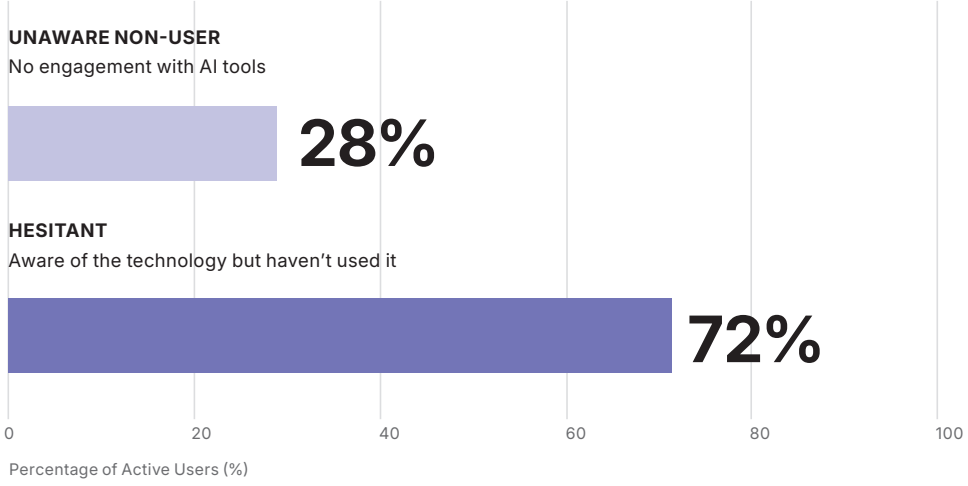
ACTIVE USERS
40%

60%
NON-ACTIVE USERS

Among active users (n=166):



Among non-active individuals (n=248):

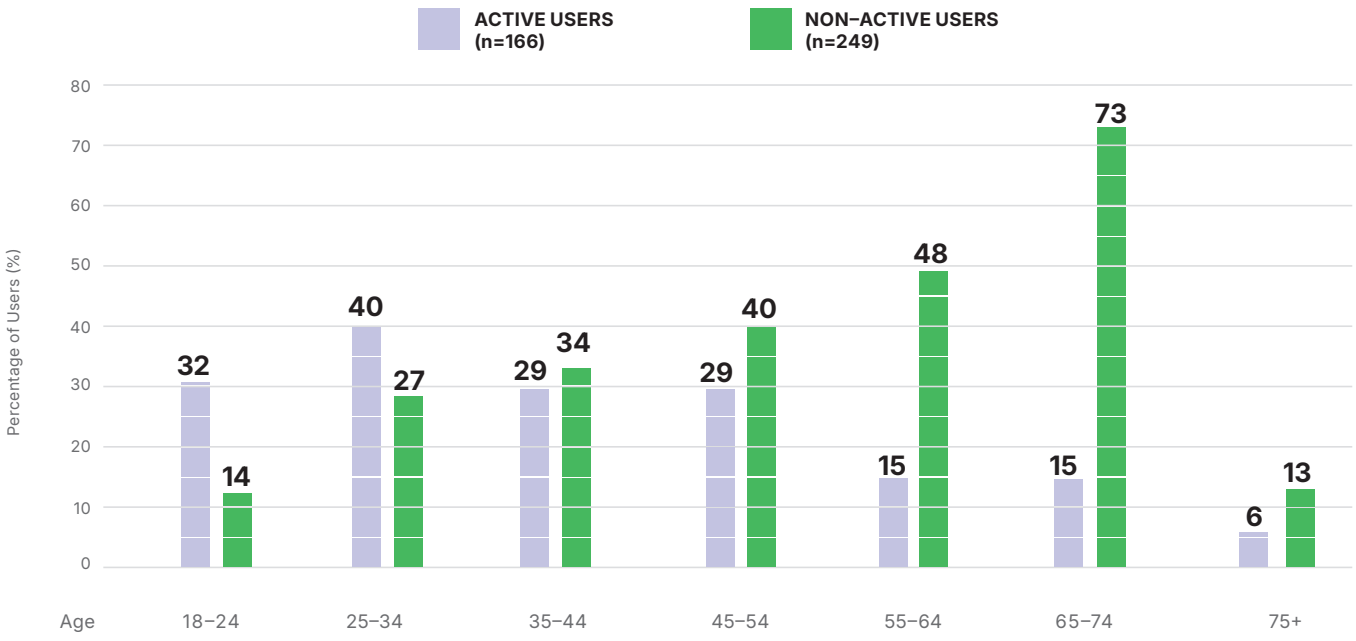


The high proportion of hesitant (72%) among non-active users represents a significant opportunity for growth, as these individuals have awareness but haven't crossed the usage threshold.

01. Demographic Patterns Shaping Adoption

Younger Spaniards demonstrate significantly higher comfort levels and engagement with generative AI tools, with nearly half of active users being under 35, while more than half of non-users are over 55. Our correlation analysis confirms a moderate relationship (r=0.342) between younger age and active user statuS.

The age-based digital divide emerges as one of the most pronounced patterns in our findings.



This divide extends beyond simple usage patterns to influence skill development. Younger users not only adopt AI tools more readily but also advance to intermediate and advanced skill levels more frequently, creating a potential expertise gap that may further entrench generational differences in Spain's digital economy.

Education: The Strongest Predictor

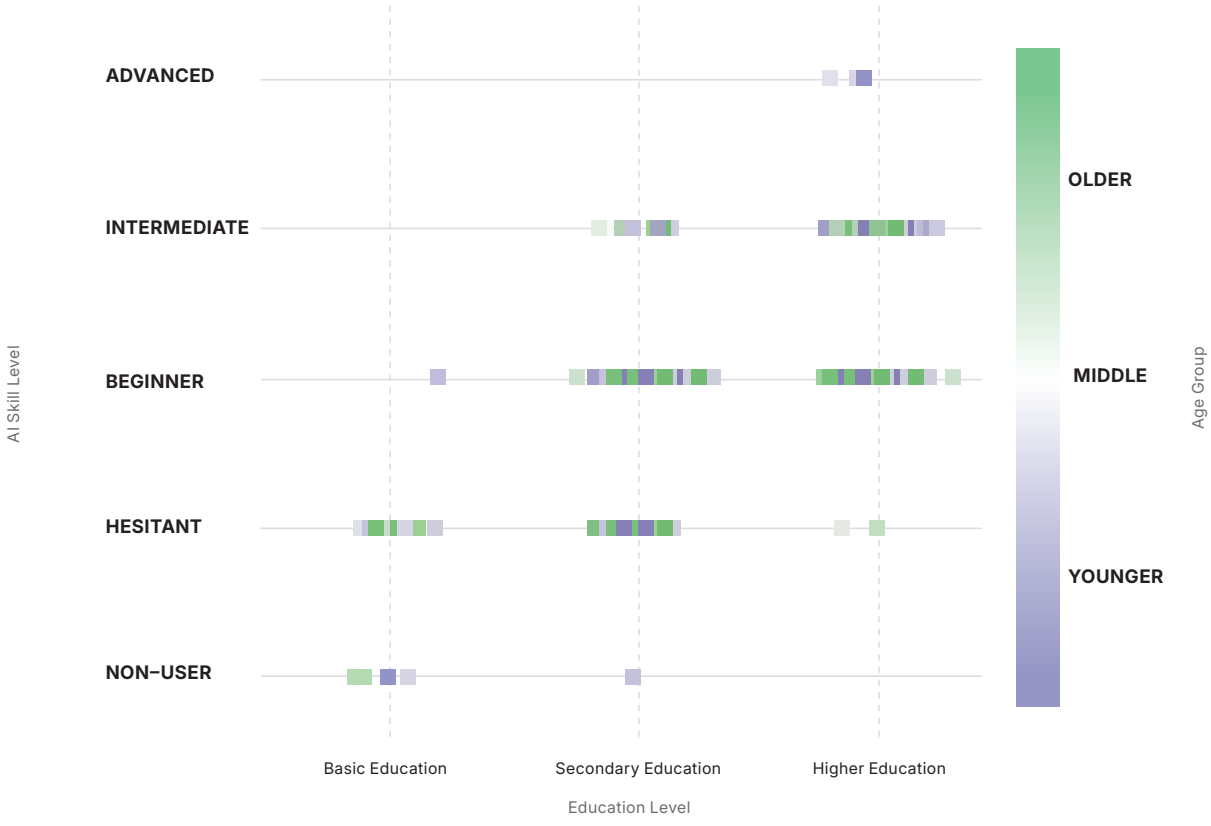
Education emerges as the strongest predictor of AI adoption in Spain, with a strong correlation (r=0.514) between educational attainment and AI skill level. Among active users, 56.6% have higher education backgrounds compared to just 38.1% of non-active users.

Moreover, education appears to function as an equalizing factor across other demographic categories. For instance, individuals with higher education levels show more consistent adoption rates regardless of age or geography, suggesting that educational interventions might be particularly effective in bridging other demographic divides in AI adoption–or that their professions more typically benefit from some form of AI usage. The strong correlation between education and urban living (r=0.596) helps explain why these factors often appear to influence adoption similarly.

Education emerges as a stronger predictor of AI adoption than geography in Spain. While rural adoption rates (44.1%) nearly match urban rates (45.3%), those with higher education are significantly more likely to use AI tools regardless of location.

Education also significantly mitigates age-related adoption barriers–seniors with higher education (48%) adopt more than young people with basic education (25%)

Correlation Between Education Level and AI Skill Level in Spain



Gender Differences: A Nuanced Picture

Women 52%

Men 48%

Spain's generative AI landscape reveals subtle but meaningful gender differences. While the overall survey sample reflects Spain's gender balance, men demonstrate higher overall adoption rates (45.2% vs. 34.7% for women).

Active Users (n=166):

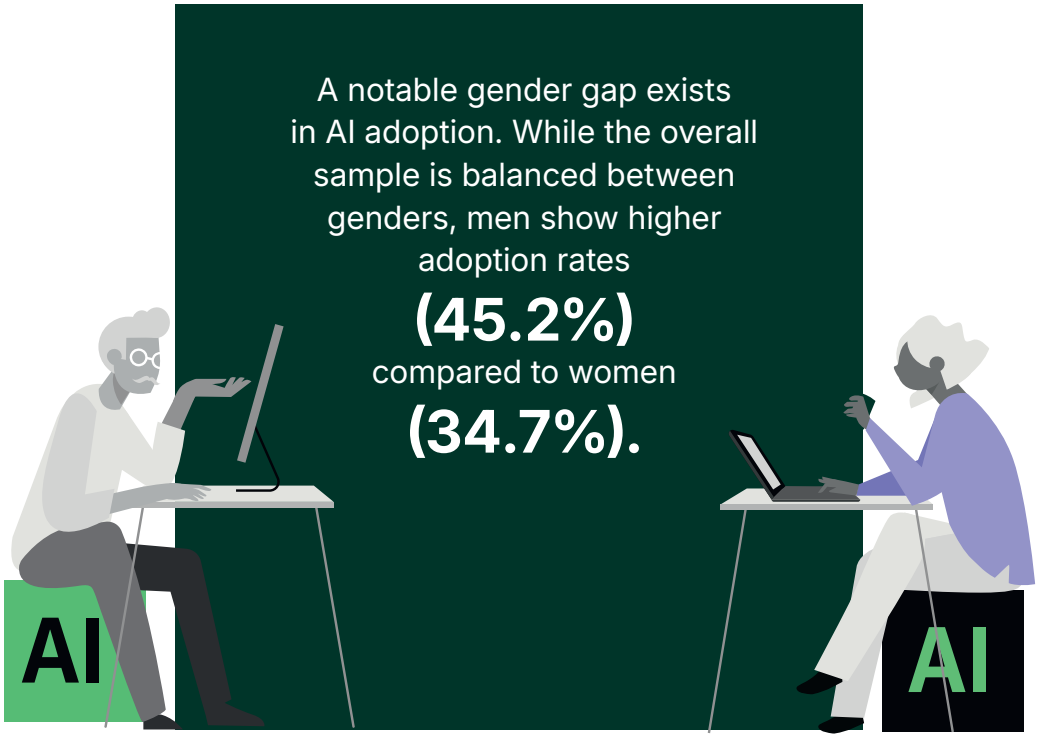
Male **55%**

Female **45%**

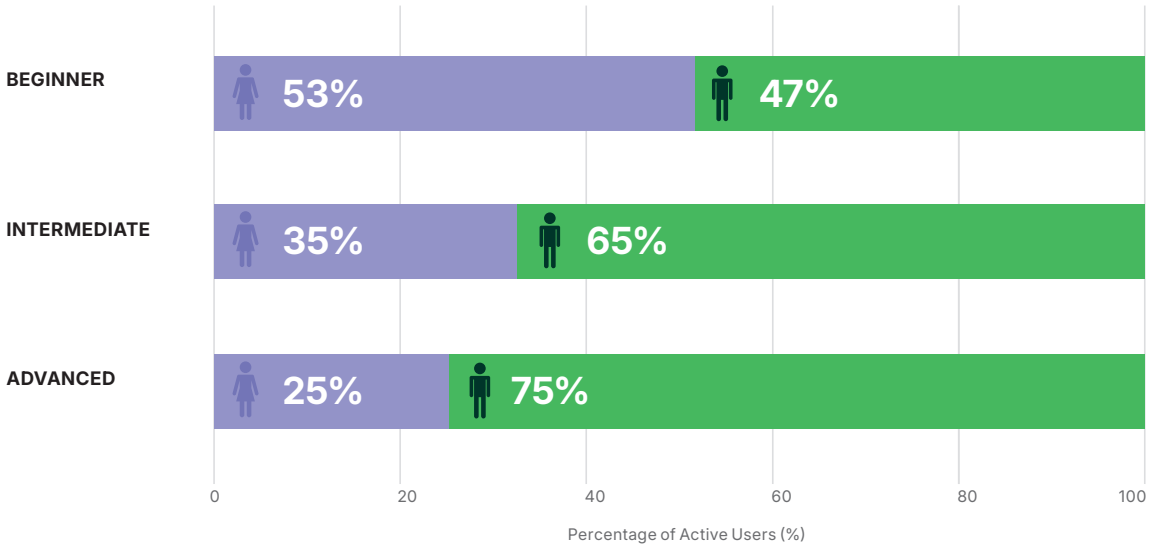
Non-Active Users (n=249):

Male **44%**

Female **56%**



The most revealing pattern is the clear diminishing female representation at advanced skill levels. While women maintain a slim majority among beginners (53.1%), they become increasingly underrepresented in intermediate (33.3%) and advanced (25.0%) user categories, suggesting that initial adoption barriers aren't the primary issue; rather, there appear to be obstacles to skill progression that disproportionately affect women.



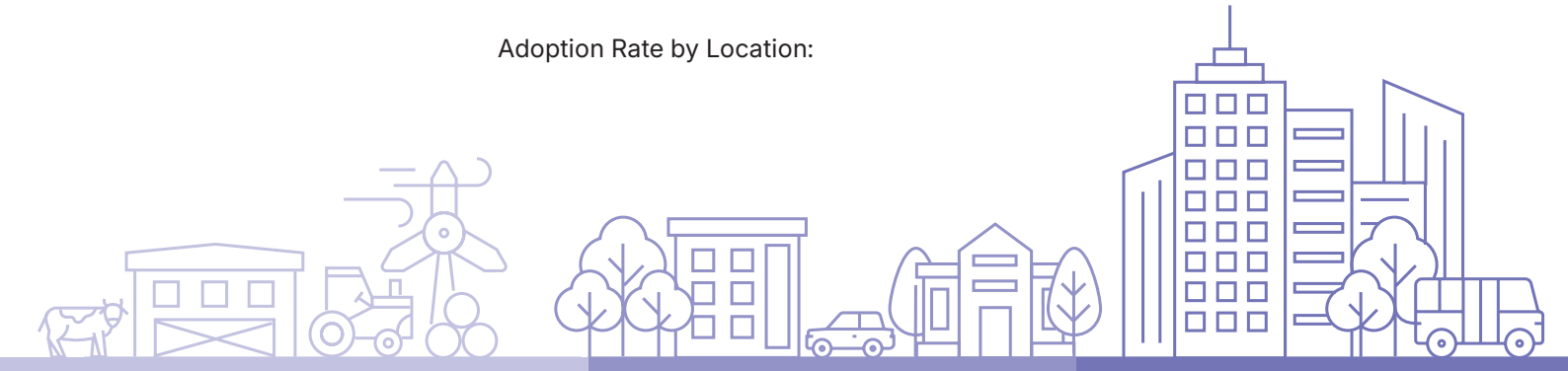
The engagement pattern differences between genders further support targeted strategies – male users also show stronger usage intensity (35.5% using AI daily/weekly vs 19.5% of females), greater tool diversity (1.69 vs 1.36 tools per user), and stronger future usage intentions (60.0% vs 45.6% planning increased personal use).

The Geographic Surprise

The relationship between location and AI adoption challenges conventional assumptions about urban–rural digital divides. While urban residents show the highest overall adoption rates (45.3%), rural adoption closely mirrors urban patterns (44.1%)—a finding reflected in the negligible correlation (r=0.083) between urban location and active user status.

The most intriguing geographic pattern emerges in towns and peripheral areas, which show substantially lower adoption rates (29.1%) than either cities or rural zones. This unexpected "middle gap" suggests that technology adoption doesn't follow a simple urban-to-rural gradient in Spain.

Adoption Rate by Location:



RURAL AREA	TOWN/PERIPHERY	CITY
45.3%	44.1%	29.1%

Urban location does show a moderate correlation (r=0.443) with advanced AI skill levels, indicating that while rural users adopt at similar rates, urban environments may better facilitate skill progression. This could be attributed to greater access to professional networks, specialized training opportunities, and tech-focused communities in urban areas that foster knowledge exchange. Additionally, urban settings typically offer more workplaces where advanced AI skills are directly applicable and valued, creating stronger incentives for users to develop expertise beyond basic tool usage.

02. Understanding Non-Users

The distinction between unaware non-users and “hesitant” reveals important nuances about technology adoption barriers in Spain. Unaware non-users (28.4% of non-active users) skew significantly older, more female (63.4%), less educated (only 26.8% have higher education), and slightly more rural than other groups, suggesting fundamental awareness or access barriers rather than deliberate rejection.

In contrast, "hesitant"—those aware of AI but not yet using it—represent a large potential growth segment (71.6% of non-active users). Their demographic profile bridges active users and unaware non-users, with higher education levels (42.7%) and a more balanced gender distribution (52.8% female), indicating substantial latent interest in AI technologies that could be activated through targeted interventions. This pattern aligns with our correlation findings that show age as primarily a barrier to initial adoption (r=0.342) rather than skill progression (r=-0.056).

Complet Non–Users Profile (n=71):		**Hesitant Profile (n=178):**
63.4% Predominantly female		**52.8%** Female users
39.4% Heavily concentrated in the 65–74 age bracket		Younger on average, though still skewing older
26.8% Lower rates of higher education		**42.7%** Higher education levels (university or beyond)
11.3% More likely to be in rural areas		More concentrated in urban areas

03. Tool Usage and Patterns

ChatGPT dominates as the most recognized and widely used AI platform, while other tools like Microsoft Copilot and Google Gemini see more selective adoption. Most users engage with AI occasionally rather than as a daily habit, and skill level plays a key role in shaping tool preferences.

Tool Awareness

Our analysis reveals that **ChatGPT dominates the generative AI landscape** in Spain, with significantly higher awareness and adoption rates compared to other platforms. This mirrors global trends but with distinct regional characteristics in adoption patterns and use cases.

Among all respondents, the top five most recognized generative AI tools are:

60.6% **ChatGPT**
251 aware users

22.5% **Google Gemini (previously Bard)**
93 aware users

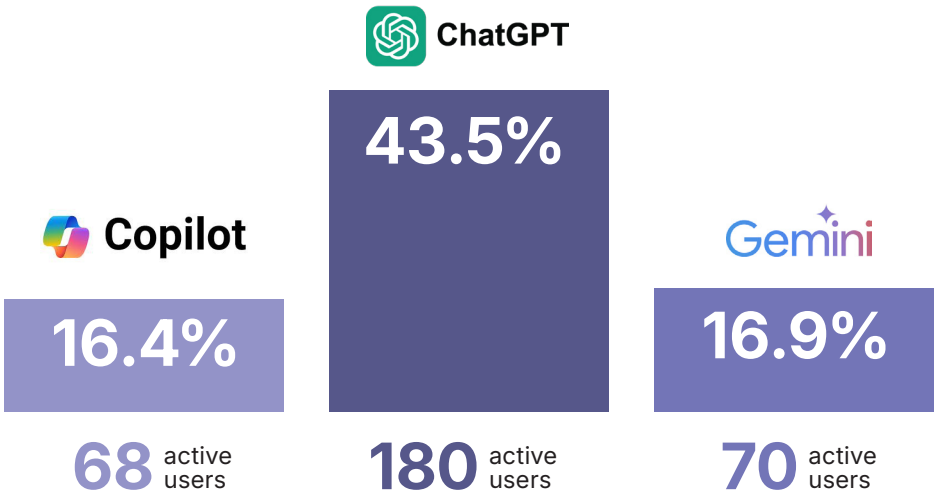
20.8% **Microsoft Copilot**
86 aware users

8.5% **DALL-E**
35 aware users

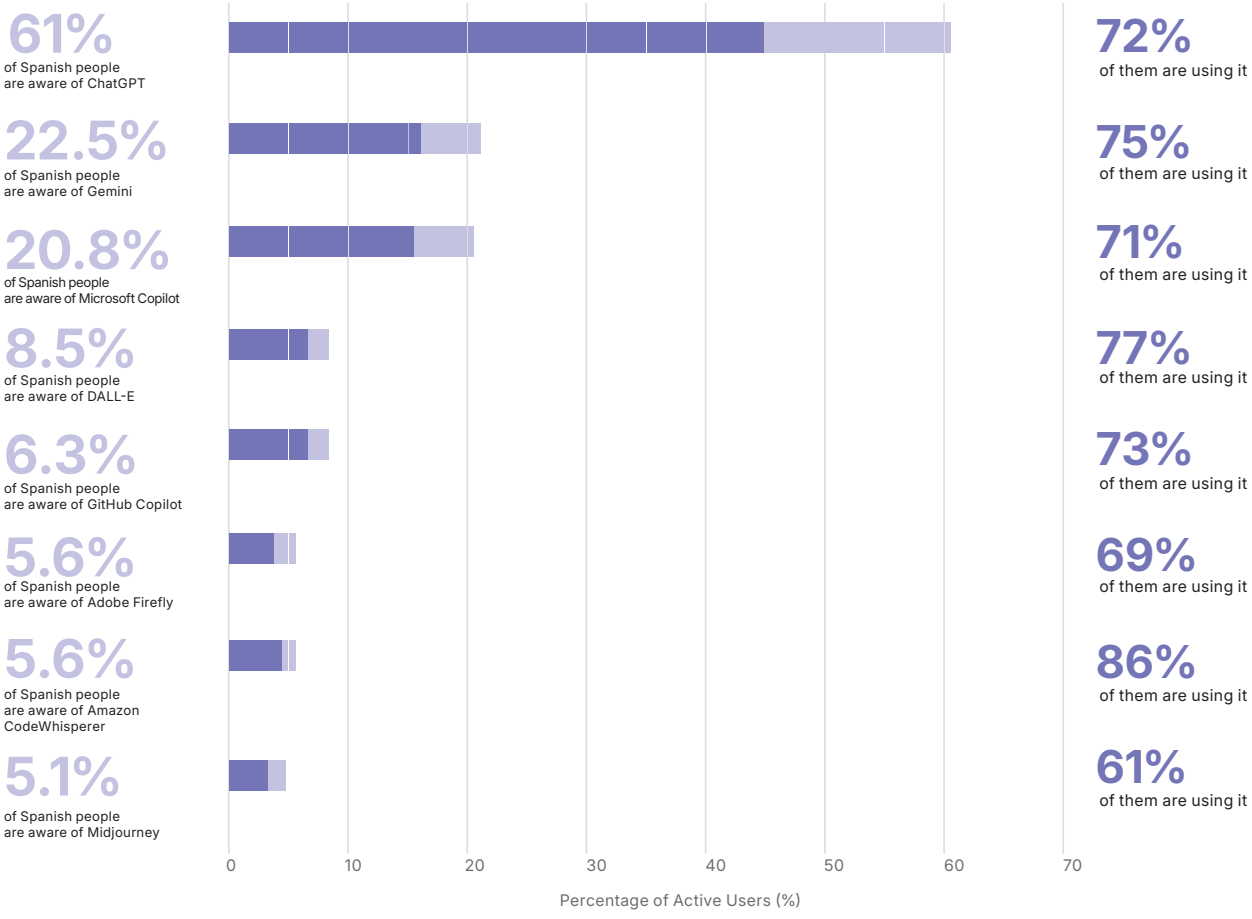
6.3% **GitHub Copilot**
26 aware users

A significant portion of respondents (31.4%) were not familiar with any of the generative AI tools listed in the survey, indicating considerable room for growth in awareness.

Active Usage: The most actively used tools



Perhaps most revealing is the "awareness-to-usage conversion" rate—how many people who know about a tool actually use it.



49%
completely unaware of any tools

51%
are aware of at least one tool

Non-User Awareness Patterns

Among non-users who are aware of at least one tool, tool recognition follows a clear hierarchy, showing that ChatGPT has achieved near-universal recognition among those with any awareness of generative AI, even if they don't personally use the technology. Two-thirds (66.9%) of aware non-users know only a single tool, which in the vast majority of cases is ChatGPT, reinforcing its position as the gateway tool to generative AI awareness.

ChatGPT	Gemini	Copilot	All other tools
91.3%	**20%**	**15%**	below **5%**
116 of aware non-users	28 of aware non-users	19 of aware non-users	awarness

Usage Frequency and Patterns

Looking at ChatGPT as the most widely used tool, usage frequency breaks down as follows:

Daily users	Several times per week	Several times per month	Occasional users	Non–users
9%	24.7%	11.5%	31.9%	22.9%

13.5%

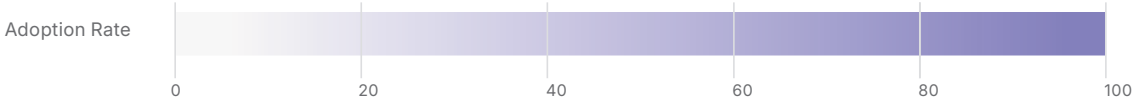
OF THE TOTAL POPULATION SURVEYED USES CHAT–GPT DAILY OR WEEKLY

This distribution shows that while many Spaniards have tried ChatGPT, regular power users (daily or weekly) represent just 33.7% of active users and 13.5% of the total population surveyed. For most Spanish users, generative AI remains an occasional resource rather than a deeply integrated tool in daily workflows.

Tool usage increases significantly with skill level:

	BEGINNERS	INTERMEDIATE	ADVANCED
ChatGPT	73.5%	80%	100%
Google Gemini	22.4%	48.3%	37.5%
Microsoft Microsoft	27.6%	48.3%	12.5%
DALL-E	7.1%	28.3%	12.5%
GitHub Copilot	6.1%	18.3%	25%
Claude	2%	6.7%	25%

Intermediate users show broader adoption across multiple platforms compared to beginners, while advanced users appear more selective in their tool choices, with universal ChatGPT adoption. This pattern suggests a typical adoption journey: beginning with exploration of a primary tool, expanding to multiple platforms during skill development, and finally settling on preferred specialized tools for specific use cases.

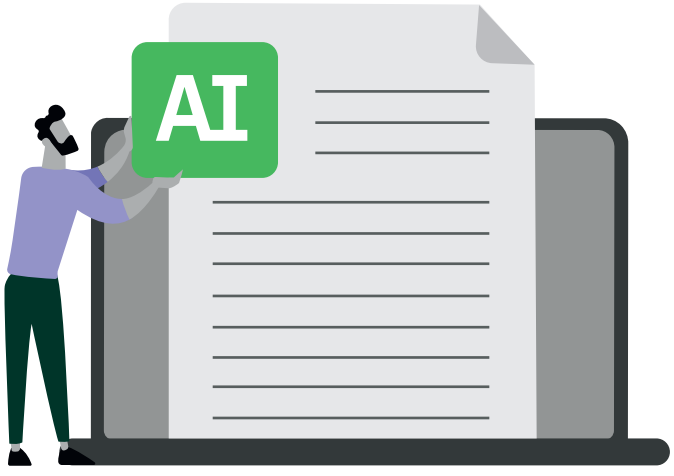


Modality Preferences

Among active users, the popularity of different generative AI categories shows a clear hierarchy:

CONVERSATIONAL	69.9%
TEXT–TO–IMAGE	23.5%
CODE GENERATION	18.1%
AUDIO/MUSIC GENERATION	13.3%
TEXT-TO-SPEECH	10.2%
SPEECH-TO-TEXT	9%
VIDEO GENERATION	7.8%

This distribution reveals that text-based conversational AI remains the primary entry point for most users, with a significant drop-off for other modalities. The hierarchy likely reflects both the versatility of text-based AI for everyday problems and the more specialized skills required to effectively utilize visual and audio generation tools.



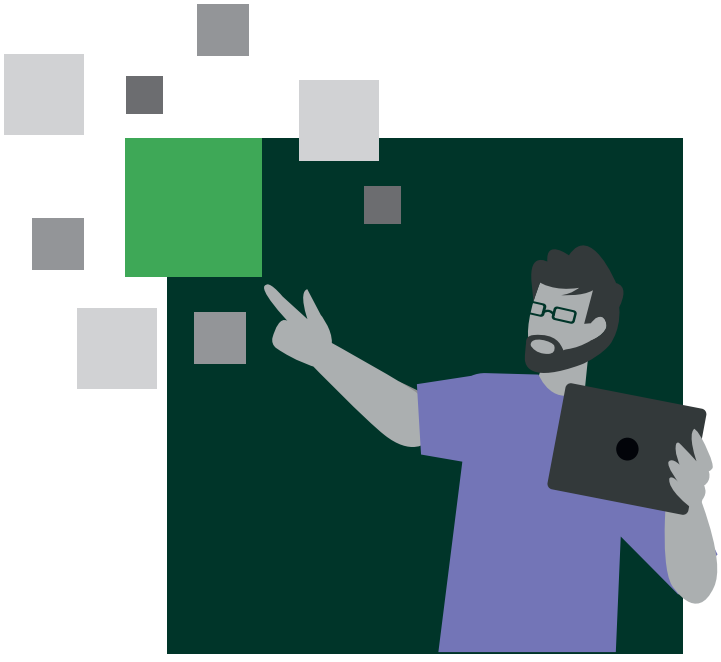
The significant drop-off after conversational AI (69.9% to 23.5% for text-to-image) suggests users specialize in fewer modalities, with text being the dominant entry point to the AI ecosystem.

Tool Diversity by Skill Level

Multi-tool adoption

As users become more experienced with generative AI, they tend to experiment with a wider variety of tools:

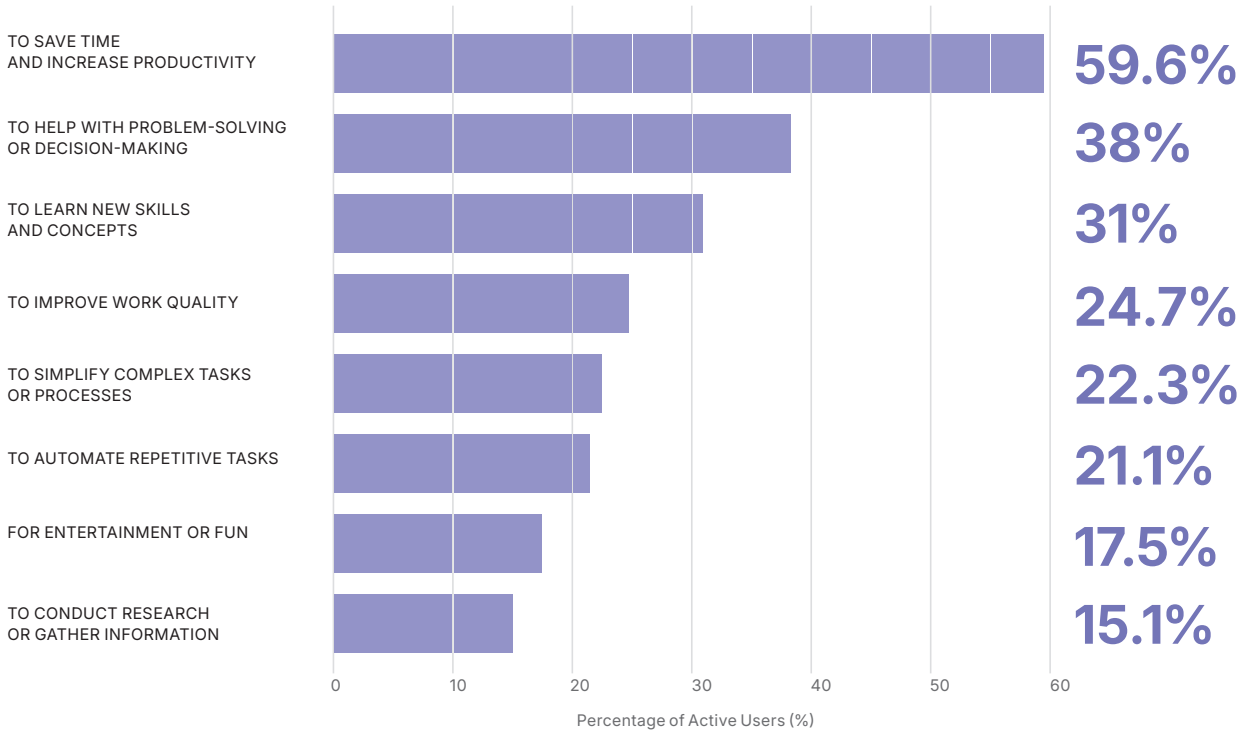
The slight decrease for advanced users may suggest they become more selective and specialized in their tool choices after experimentation. This inverted U-shaped pattern of tool diversity mirrors adoption curves seen in other technology domains, where users initially expand their toolkit before optimizing and focusing on their most valuable solutions.



04. Motivations and Use Cases

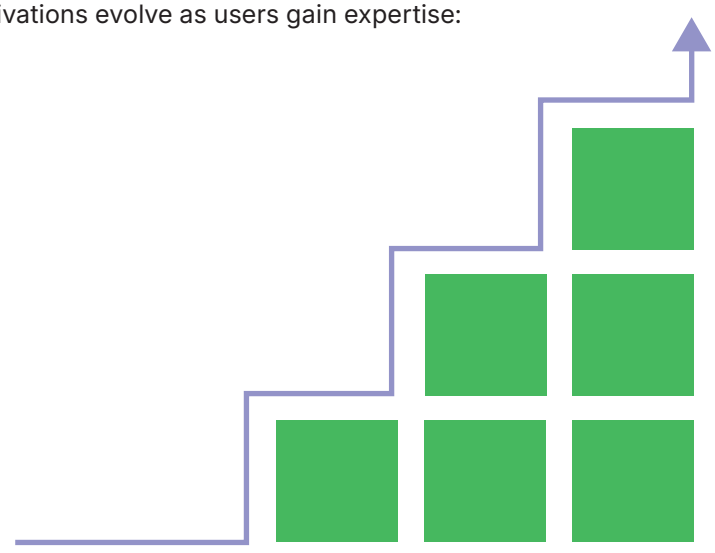
Spanish users demonstrate diverse motivations for adopting AI tools, with productivity and problem-solving emerging as the dominant drivers.

Primary Motivations for Using Generative AI in Spain



Lower-ranked motivations include task automation (21.1%), entertainment (17.5%), research (15.1%), and education support (14.5%). Notably, only 3.6% of users cited fear of missing out (FOMO) as a motivation, suggesting that Spanish users are primarily driven by practical benefits rather than social trends.

Motivations evolve as users gain expertise:



Advanced users
demonstrate the highest rates of process simplification and prototype development.

Intermediate users
focus more on productivity and work quality.

Basic users
prioritize learning and entertainment.

This progression suggests that users initially approach generative AI with exploratory and educational goals, then increasingly leverage it for professional productivity as they become more skilled.

The Productivity-Entertainment Duality

When examining how frequently Spanish users employ generative AI for specific purposes, we see an interesting contrast to stated motivations:

Most Common Regular Uses:

44.0% CURIOSITY/ENTERTAINMENT

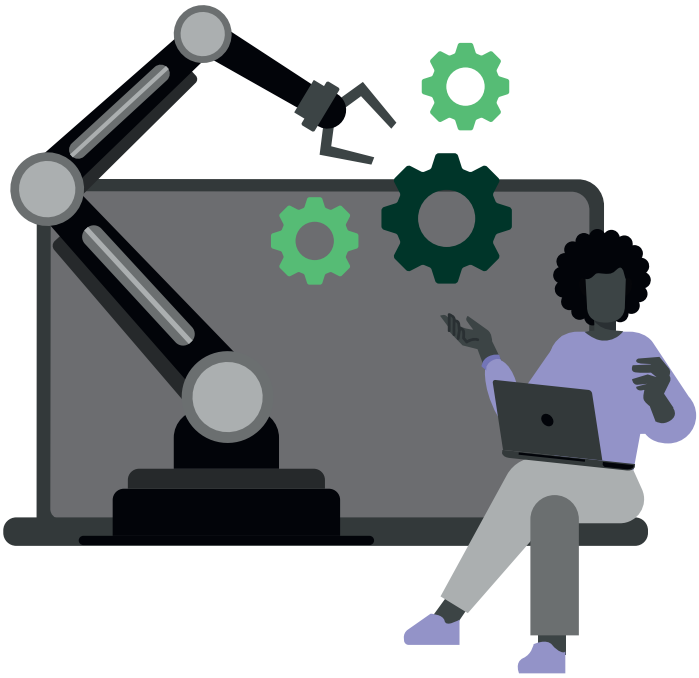
44.0% KNOWLEDGE EXPANSION

41.6% CREATIVE INSPIRATION

39.8% NEW LEARNING APPROACHES

39.2% PROFESSIONAL PRODUCTIVITY

While productivity is the top-cited motivation (59.6%), actual usage patterns reveal a more balanced distribution across entertainment, learning, and work-related purposes. This suggests Spanish users initially adopt AI for practical reasons but discover unexpected value in recreational and educational applications.



The data reveals an intriguing pattern: while productivity is the most common motivation for adopting generative AI tools, it's not the strongest predictor of continued use. Users motivated by task automation and process simplification demonstrate the highest intentions (74.1%) to increase their AI usage in the future.

Frequency of GenAI Usage by Purpose in Spain:

Engaging with AI for more diverse purposes

YOUNG USERS
1.58
different purposes per user

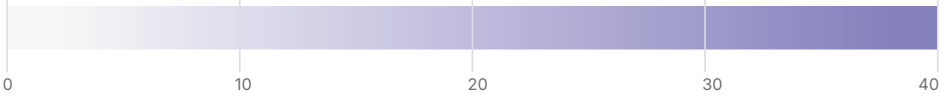
SENIORS
1.11
different purposes per user

Advanced use cases like multimodal

YOUNG USERS
29.2%

SENIORS
13.9%

	Daily	Weekly	Monthly	Occasionally	Not used
KNOWLEDGE EXPANSION	8.4%	17.5%	18.1%	33.7%	22.3%
CURIOSITY/ENTERTAINMENT	10.2%	14.5%	19.3%	37.3%	18.7%
CREATIVE INSPIRATION	4.8%	13.9%	22.9%	34.3%	24.1%
NEW LEARNING APPROACHES	4.8%	21.2%	13.9%	32.5%	27.7%
PROFESSIONAL PRODUCTIVITY	4.8%	16.3%	18.1%	29.5%	31.1%
DRAFT PREPARATION	4.8%	14.5%	19.3%	35.5%	25.9%
PARTIAL TASK AUTOMATION	4.8%	13.3%	14.5%	33.1%	34.3%
COMPLETE TASK AUTOMATION	3.6%	11.4%	12.7%	30.1%	42.2%
PERSONAL BRANDING	3%	6.6%	14.5%	32.5%	43.4%
Frequency:					



Content Modification Practices

How users interact with AI-generated content provides important insights into their trust levels and workflow integration. Spanish users show a balanced approach to content modification. However, the habits vary across skill levels:

BASIC USERS

8.2%
make no modifications

20.4%
make heavy modifications

INTERMEDIATE USERS

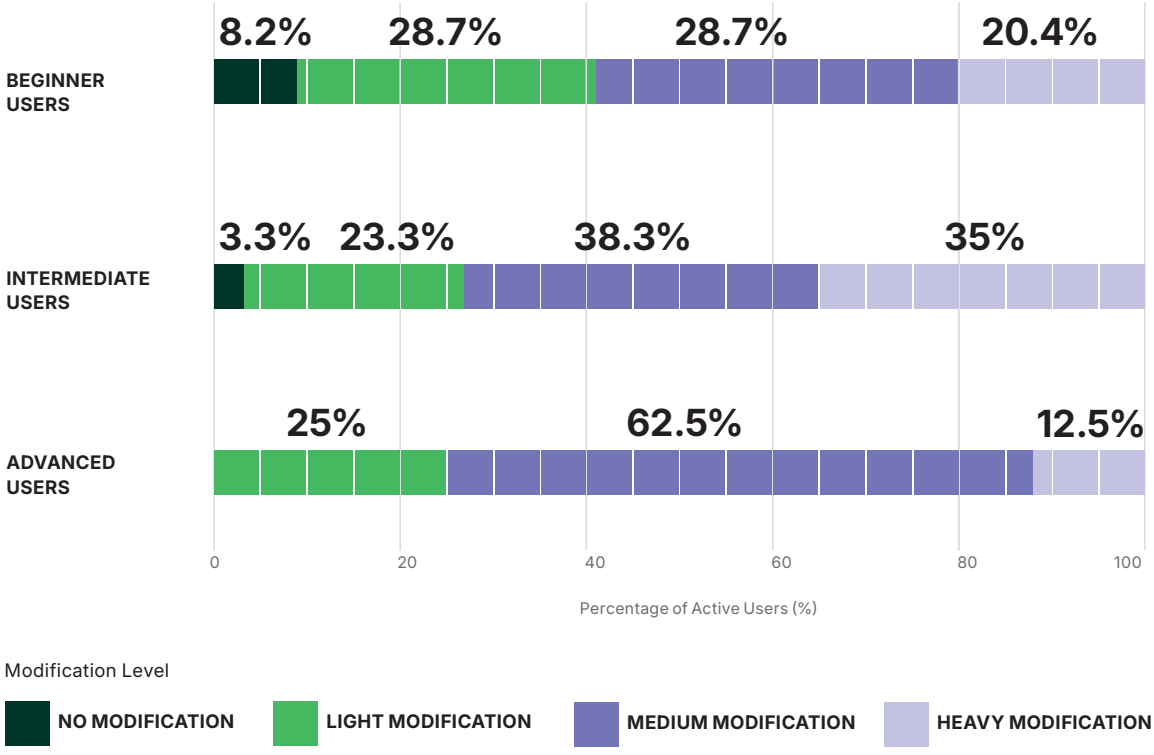
3.3%
make no modifications

35%
make heavy modifications

ADVANCED USERS

nearly
100%
of advanced users modify at least somehow the model's outputs, not relying on the initial answer.

As users gain expertise, they tend to move away from both extremes (no modification and complete rewrites) toward a more balanced approach of selective, purposeful editing. Advanced users appear to have developed better prompt engineering skills that produce outputs requiring only moderate adjustments.

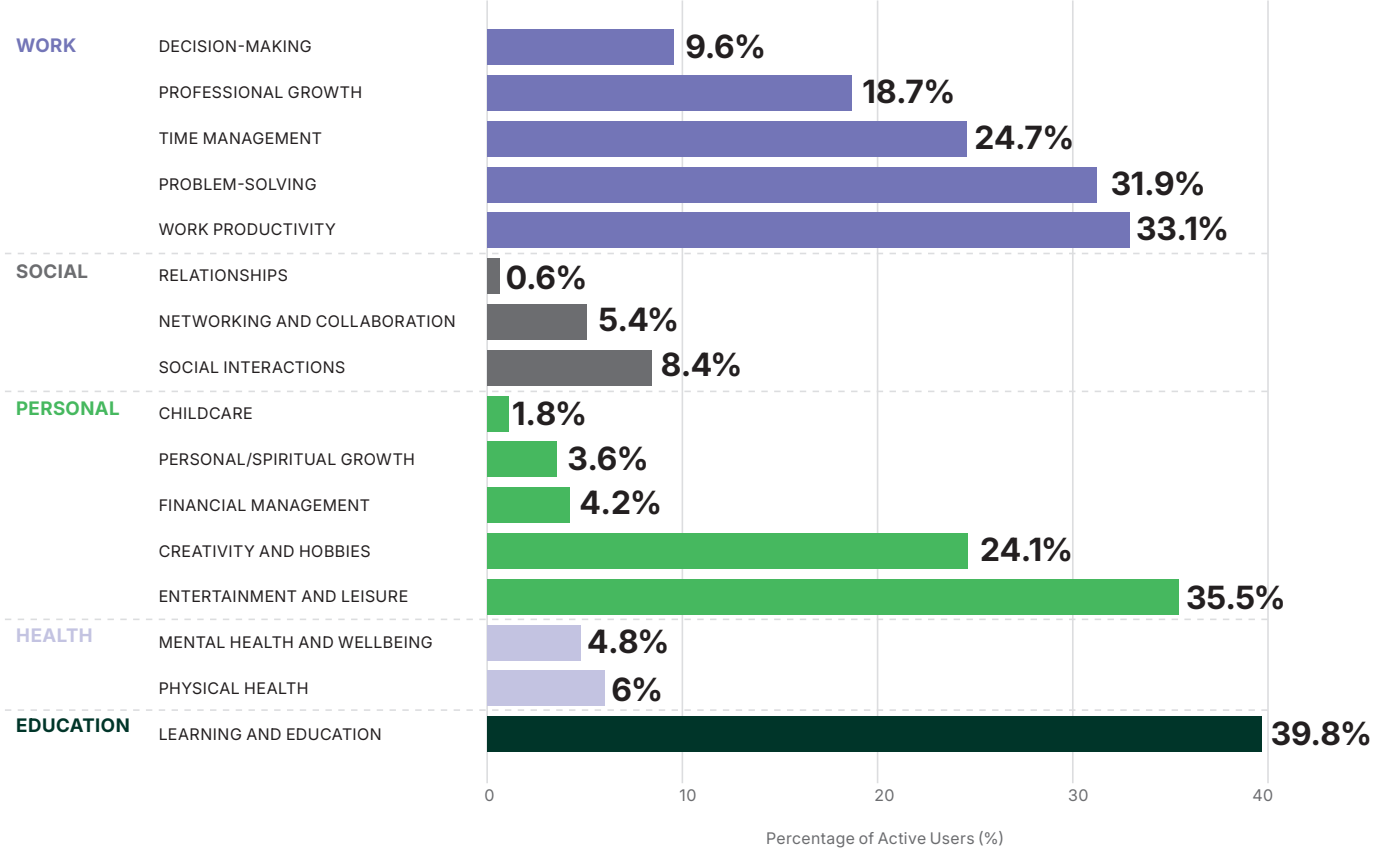


Generative AI is affecting various aspects of users' lives, with clear priorities emerging in the Spanish market.

Most Impacted Life Areas

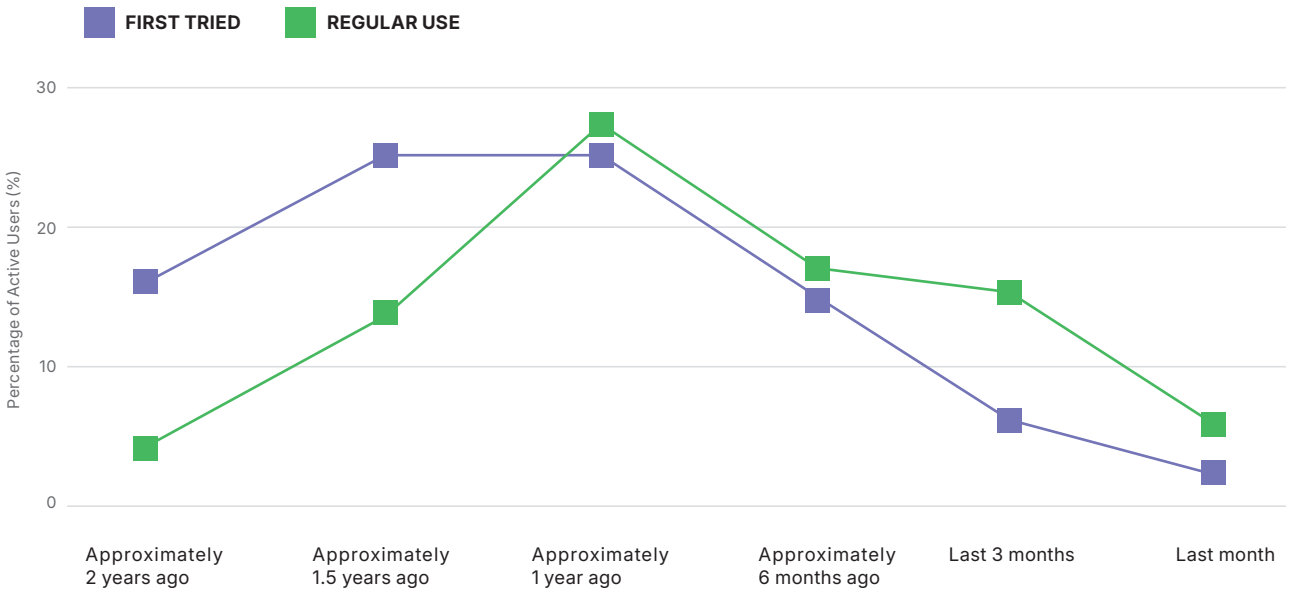
The dominance of learning, entertainment, and productivity aligns with the primary motivations and usage patterns identified earlier. Areas showing minimal impact include relationships (0.6%), childcare (1.8%), and spiritual/personal growth (3.6%).

The analysis reflects responses from active users only (n=166). The percentages shown for each impact area (e.g., learning and education: 39.8%) indicate the proportion of active users who selected that particular area as one of their top three impacts.

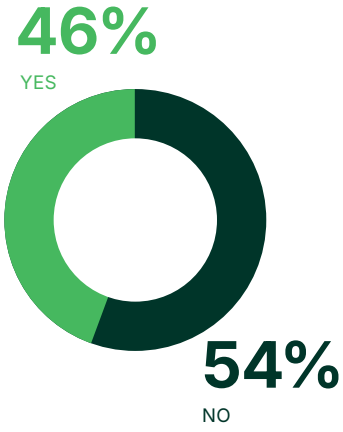


Note: Since it was a multiple-choice question, each user could select up to three areas, meaning an individual respondent's selections were distributed across different categories. The data shows the frequency with which each area was selected, with the most commonly chosen areas appearing at the top of the chart.

Generative AI Adoption in Spain: First Trial vs. Regular Usage



The data shows a lag between first trial and regular usage, with the peak of first trials occurring 1–1.5 years ago, while the peak of regular usage started approximately 1 year ago. This suggests a typical 6-month "consideration period" between initial exploration and committed usage.



The Early Adopter Transition

When asked whether they typically try new technologies before others:
46.4% of active users responded "Yes"
53.6% responded "No"

This near-even split suggests that generative AI has successfully crossed the chasm from early adopters to the early majority in the Spanish market, as nearly half of current users don't consider themselves technology pioneers.

77.9%
expressing desire to learn more about new tools compared to just
52.8%
of late adopters

Tool knowledge and exploration: Early adopters demonstrate substantially broader tool awareness, knowing 3.3 tools on average compared to 2.1 for late adopters—a 57% difference. This suggests early adopters actively explore the AI ecosystem rather than settling on a single solution.

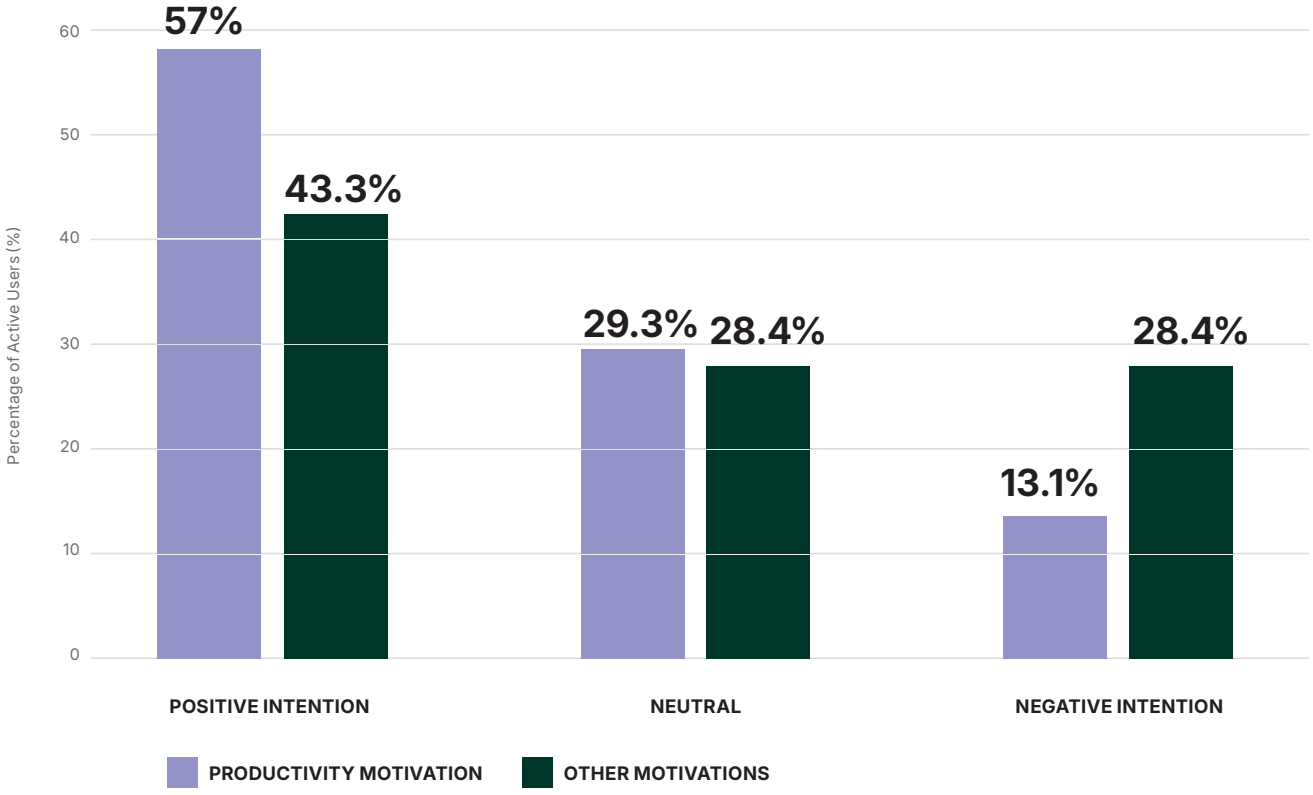
Learning orientation: Early adopters show dramatically higher learning motivation, with **77.9% expressing the desire to learn more about new tools compared to just 52.8% of late adopters.** This 25.1 percentage point difference reveals a fundamental mindset distinction—early adopters view generative AI as an evolving domain to explore, while late adopters approach it more instrumentally.

Future Growth Signals

Spanish users demonstrate strong positive intentions for increased future usage:

	Personal use intentions	Professional use intentions
POSITIVE	53%	52%
NEUTRAL	32%	29%
NEGATIVE	14%	19%

Users motivated by productivity show significantly different patterns in their intentions to increase professional AI use compared to those with other motivations. Among productivity-motivated users, 57.6% express positive future intentions vs. only 43.3% of users with other motivations. The chi-square test confirms this difference is statistically significant ($p < 0.05$), suggesting that productivity-seekers form a distinct user segment with stronger professional adoption trajectory. This correlation provides evidence that initial motivation meaningfully shapes long-term engagement patterns.



05. Barriers to Adoption

The Spanish market reveals several distinct obstacles to generative AI adoption that vary notably across demographic segments.
While younger users face concerns about job displacement and AI misuse, older adults struggle more with perceived technical difficulty. Education emerges as a powerful equalizer, with higher education levels showing more consistent adoption rates regardless of age or geography. Understanding these barriers provides crucial insights for increasing AI adoption across the Spanish population.

Age-Related Barriers

OLDER ADULTS (65–74):

43.3%

INDICATE LEARNING DIFFICULTY

Technical Confidence Barrier
Strongest in older groups (65+), where over 40% perceive AI tools as difficult to learn.

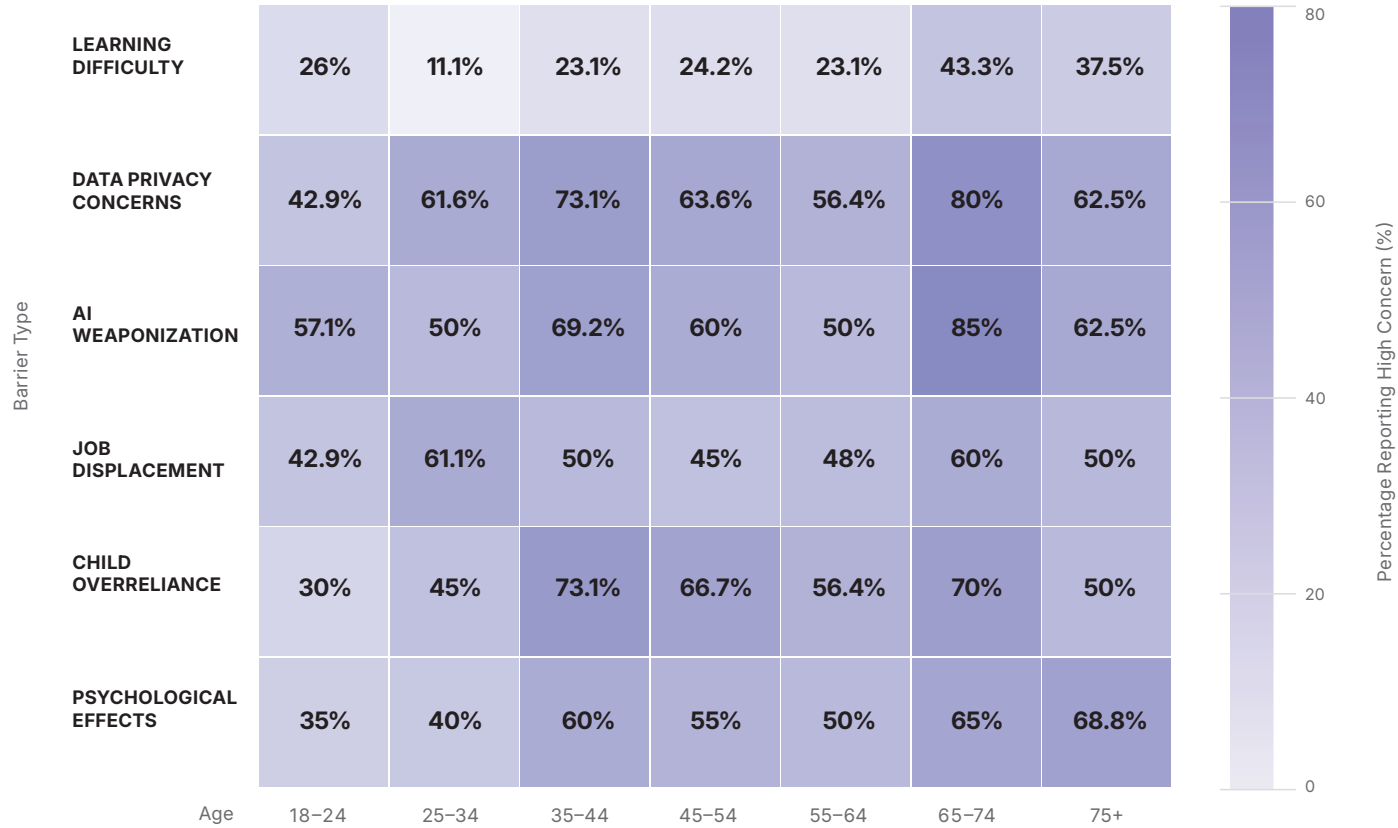
Labor Market Concern Barrier
Strongest in 25–34 age group, where employment and replaceability concerns are the highest.

Privacy/Security Barrier
Strongest in 65–74 age group, where data misuse concerns exceed 75%.

Societal Impact Barrier
Varies by life stage–middle adults (35–54) are most concerned about impacts on children, while seniors (75+) uniquely prioritize psychological impacts.

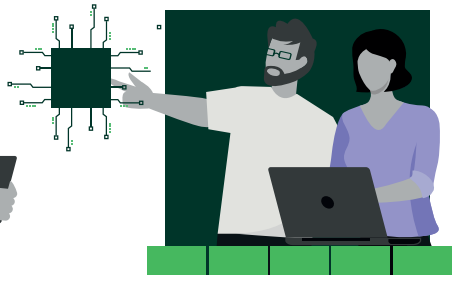
Technology Identity Barrier
This barrier is most pronounced in 55+ age groups, where early-adopter identity drops below 13%.

Barriers to AI Adoption by Age Group in Spain



Age-related barriers evolve through life stages:

YOUNGER GROUPS
worry about
job market impacts.



MIDDLE-AGE ADULTS
focus on impacts
on children.

SENIORS
prioritize security and
broader societal impacts.

The Gender Awareness Gap

40% vs. 19.5%
More men have advanced/intermediate AI skills.

70.6% vs. 73.5%
Women and men adopt AI at similar rates once aware.

71.4% vs. 71.8%
Similar ChatGPT awareness-to-usage conversion.

35% vs. 19%
Men use AI more frequently (daily/weekly).

1.6 vs. 1.7
Men use a greater variety of AI tools.

60% vs. 46%
More men plan to increase AI use.

The most striking gender pattern in Spain's AI landscape isn't in adoption rates alone, but in the journey to adoption. While there exists a 6.7 percentage point gap in overall AI use between men (55.3%) and women (48.6%), the underlying dynamics reveal a more nuanced story. The primary difference lies in early- adopter identity, with men being 2.7 times more likely to identify as technology pioneers (35.7% vs. 13.2%), which directly translates to different skill distributions – 40.0% of male users report advanced/intermediate skills compared to just 19.5% of female users.

However, our conversion analysis reveals a crucial insight: once aware of AI tools, Spanish women adopt them at nearly identical rates to men (70.6% vs. 73.5%). This "Dual Gap Phenomenon" is consistent across most tools–particularly ChatGPT, where both genders show remarkably similar awareness-to-usage conversion (71.4% for women, 71.8% for men). The gender adoption divide stems primarily from an awareness gap (7.2 percentage points) rather than a willingness to use once aware, suggesting that awareness-focused initiatives could effectively close the gender divide in AI adoption without needing to address separate usage barriers.

The engagement pattern differences further support targeted strategies–male users show stronger usage intensity (35.5% using AI daily/weekly vs. 19.5% of females), greater tool diversity (1.69 vs. 1.36 tools per user), and stronger future usage intentions (60% vs. 45.6% planning increased personal use). These metrics reveal that while the initial conversion is similar between genders, deeper engagement patterns diverge, requiring distinct approaches for driving awareness among women versus encouraging advanced usage patterns once adoption has occurred.

Premium Adoption Readiness

The Spanish market demonstrates significant reluctance to pay for premium AI services, with only 25.6% of current AI users expressing positive payment intentions. Most users (49.3%) explicitly reject the idea of paying for premium AI tools.

A striking relationship exists between early-adopter identity and payment willingness:

39.5% of self-identified early adopters are willing to pay for premium AI services.

16.3% of late adopters express similar willingness.

Usage intensity strongly predicts payment willingness:

50% Daily users

38.6% Using several times weekly

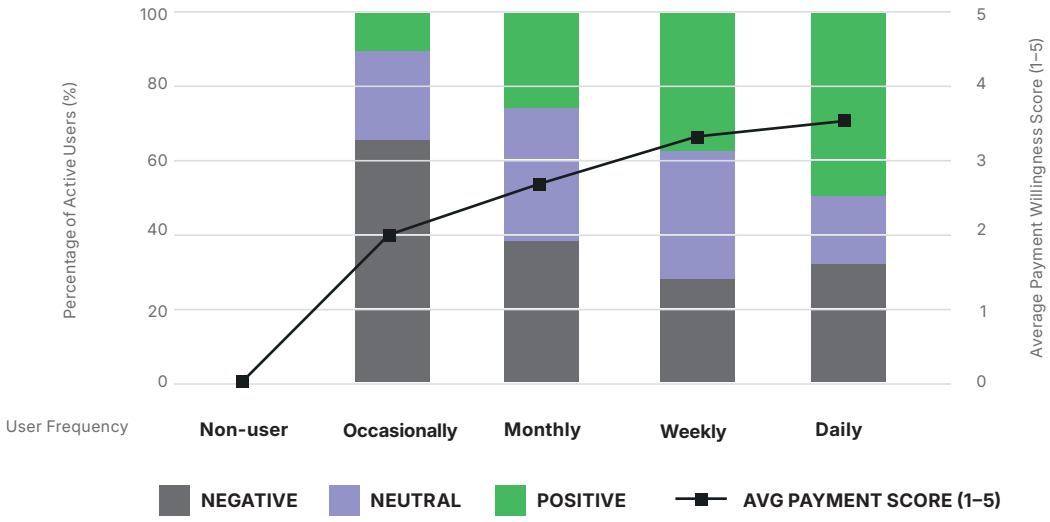
26.1% Using several times monthly

10.4% Occasional users

SKILL LEVEL	POSITIVE PAYMENT INTENTION	AVERAGE PAYMENT SCORE (1–5)
BEGINNER	16.1%	2.23
BASIC	25.9%	2.59
INTERMEDIATE	33.3%	2.96
ADVANCED	33.3%	3.17
PROFESSIONAL	100%	4.00

For each skill level increase, payment willingness increases by an average of 0.33 points on a 1–5 scale, highlighting that skill development initiatives could indirectly drive premium adoption.

Relationship between AI Usage Frequency and Premium Payment Willingness



POLAND

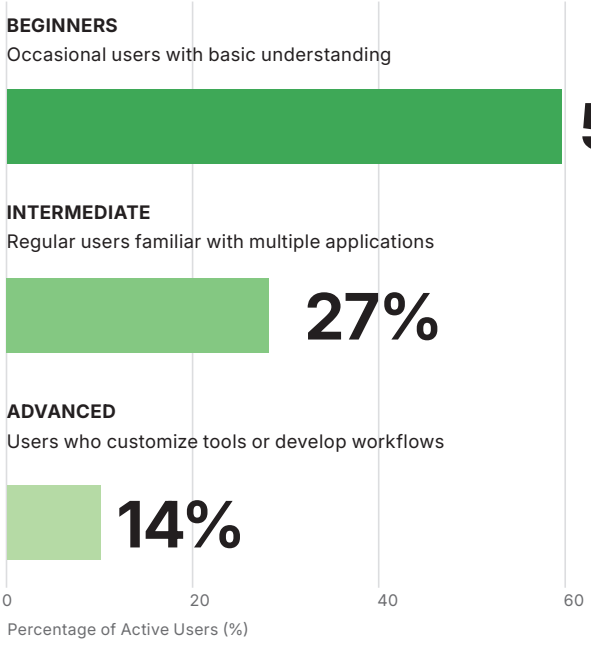
Poland shows a remarkably high adoption rate of generative AI technologies, with **63% of respondents actively using these tools**. This places Poland above the global average in AI adoption, demonstrating the country's technological openness.

Based on the tool usage question, we identified:

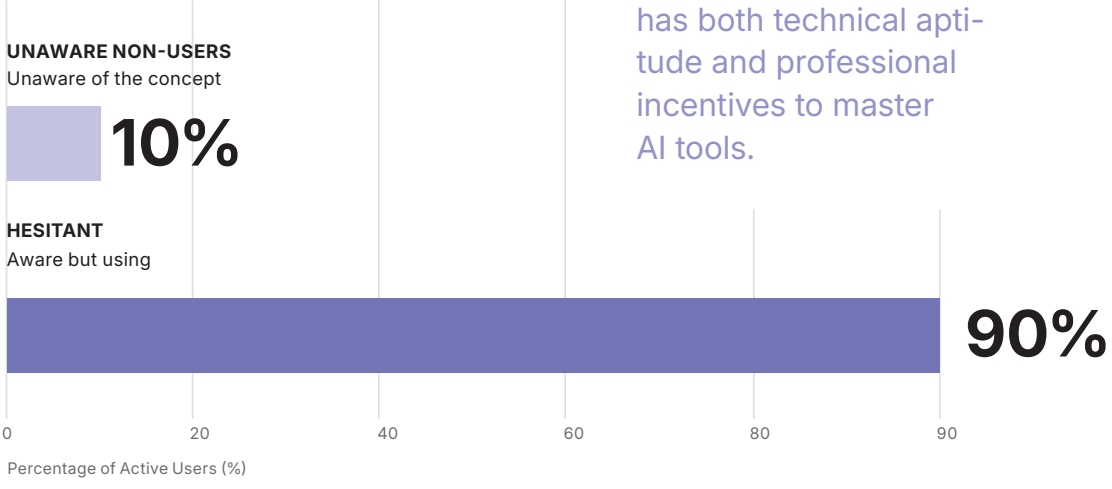
ACTIVE USERS
63%

37%
NON-ACTIVE USERS

Among active individuals (n=371):



Among non-active individuals (n=213):



Poland´s adoption landscape reveals a clear generational divide, with the "skill index" declining steadily from 1.44 (18–24 age group) to 0.63 (65–74 age group). However, the 25–34 age group stands out with the highest percentage of advanced users, suggesting this cohort has both technical aptitude and professional incentives to master AI tools.

Age-Based Adoption Patterns

86%
young Poles use AI

A clear age divide exists in how Poles use AI tools. The youngest adults (18–24) lead the way with **85.9%** using AI and only **14.1%** staying away completely. They're not just trying AI–**38%** use it regularly with good understanding.

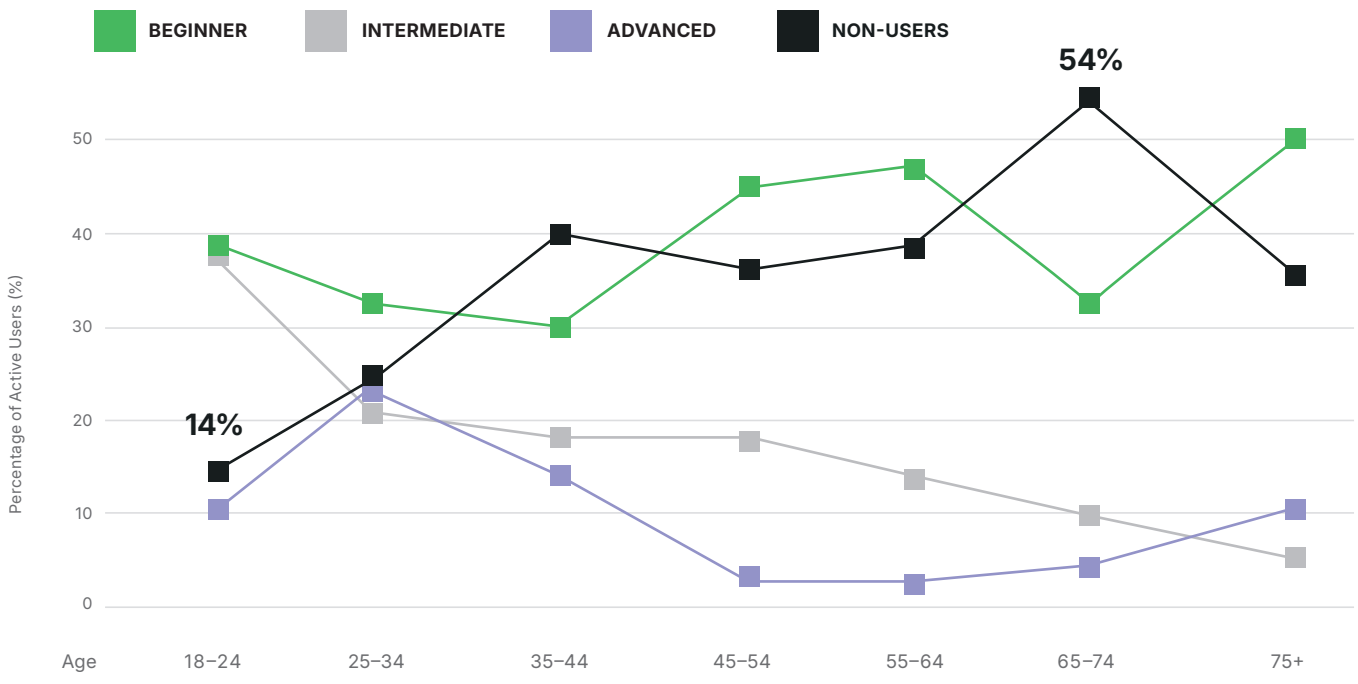
23%
young professional users are AI experts

Young professionals aged 25-34 are Poland's AI experts, with nearly a quarter (**23.2%**) qualifying as advanced users who customize or develop AI solutions. Over **75%** in this group use AI in some way, making them the most sophisticated users across age groups.

54%
older Poles don't use conversational AI models

In contrast, older Poles are much less engaged with AI. Among those 65–74, more than half (54.5%) don't use AI at all, and very few develop advanced skills–only 9.1% reach intermediate level and just 4.1% use AI at an advanced level. This highlights a significant generation gap in who benefits from these new technologies.

Skill Level Distribution by Age in Poland



Opinion and Belief Comparison: Users vs. Non-Users

The following table highlights the significant differences in attitudes toward generative AI between users and non-users in Poland:

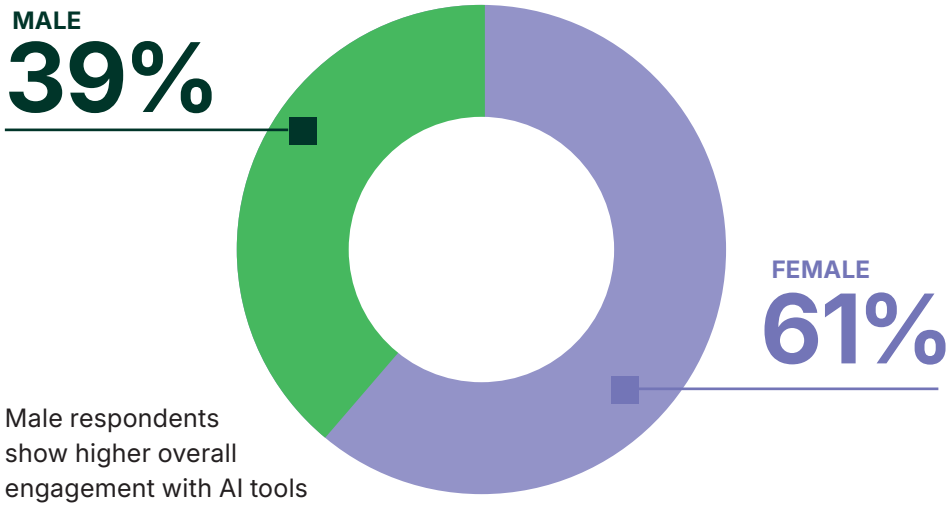
OPINION/ISSUE	USERS	NON-USERS	DIFFERENCE
ARE CONCERNED ABOUT DATA PRIVACY	41%	76%	+35% ▲
BELIEVE THAT AI CONTENT CAN BE TRUSTED	65%	28%	-40% ▼
ARE CONCERNED ABOUT JOB LOSS	58%	81%	+23% ▲
THINK AI TOOLS ARE DIFFICULT TO LEARN	31%	64%	+33% ▲
SEE AI AS RELEVANT TO THEIR LIVES	84%	41%	-43% ▼
IDENTIFY AS EARLY ADOPTERS	58%	14%	-41% ▼
WORRY ABOUT INCORRECT INFORMATION	35%	68%	+33% ▲
BELIEVE STRONGER AI REGULATION IS NEEDED	63%	82%	+19% ▲

While 59.1% of Poles are already using AI tools, the remaining 40.9% express substantially higher concerns about privacy, job displacement, and learning difficulties. Non-users are considerably less likely to identify as early technology adopters (17% vs. 58% of users) and show stronger preferences for regulatory oversight. These findings suggest that adoption barriers in Poland are primarily psychological rather than technical or access-related. Addressing specific concerns about data privacy, job security, and perceived learning complexity could significantly accelerate AI adoption in this market.

01. The Gender Gap: Different Patterns of AI Engagement

While women are more represented among non-users, men are nearly twice as likely to reach advanced proficiency. Additionally, while women favor conversational AI, men are significantly more engaged with technical tools like code, video, and audio generation. These differences suggest that beyond education, professional exposure and broader societal factors may be shaping AI adoption trends in Poland.

Higher Non-User Proportion Among Women:



Male respondents show higher overall engagement with AI tools

Skill Level Distribution of Active Users by Gender:

	BEGINNERS	INTERMEDIATE	ADVANCED
	60%	29%	11%
	47%	26%	27%

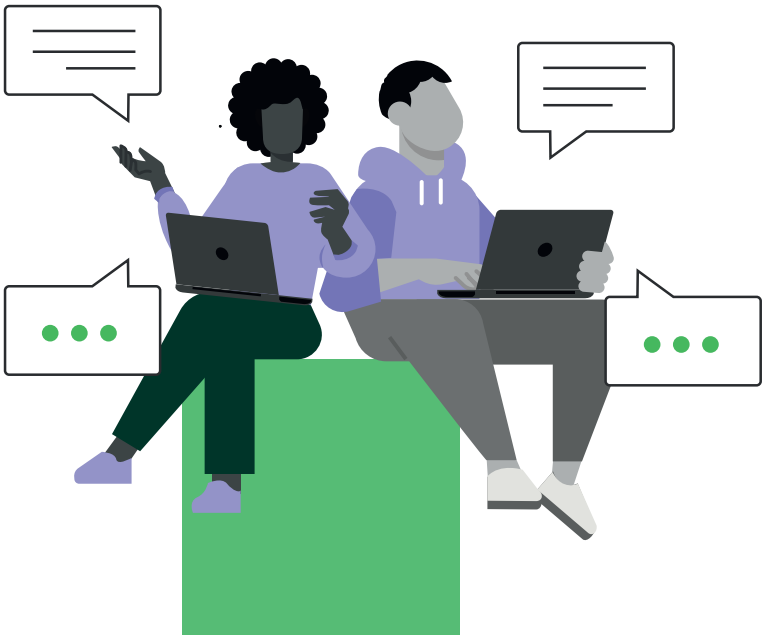
The gender gap in AI skills persists across all education levels in Poland, and actually widens at higher education levels. This suggests that factors beyond educational attainment—possibly including professional focus areas, technology exposure, or cultural factors—are influencing AI adoption patterns between men and women.

Tool Preferences by Gender

Among active users of AI, women and men show distinct preferences in the types of tools they use:

TOOL TYPE	FEMALE USERS	MALE USERS	DIFFERENCE
CONVERSATIONAL	63.8%	58.1%	-5.7%
CODE GENERATOR	8.5%	17.7%	+92%
VIDEO	7.9%	19.9%	+12%
TEXT–TO–SPEECH	17.5%	26.9%	+9.4%
AUDIO/MUSIC GENERATION	17.5%	26.9%	+9.4%

Women show stronger preference for conversational AI tools, while men are significantly more likely to use technical and creative tools like code generation, video generation, and audio generation.



Higher Education Doesn´t Close the Gender Gap

Among those with graduate degrees, 44.2% of women are non-users vs. 28.4% of men, and male graduate degree holders are nearly twice as likely to be advanced users (10.2% vs. 5.8%).

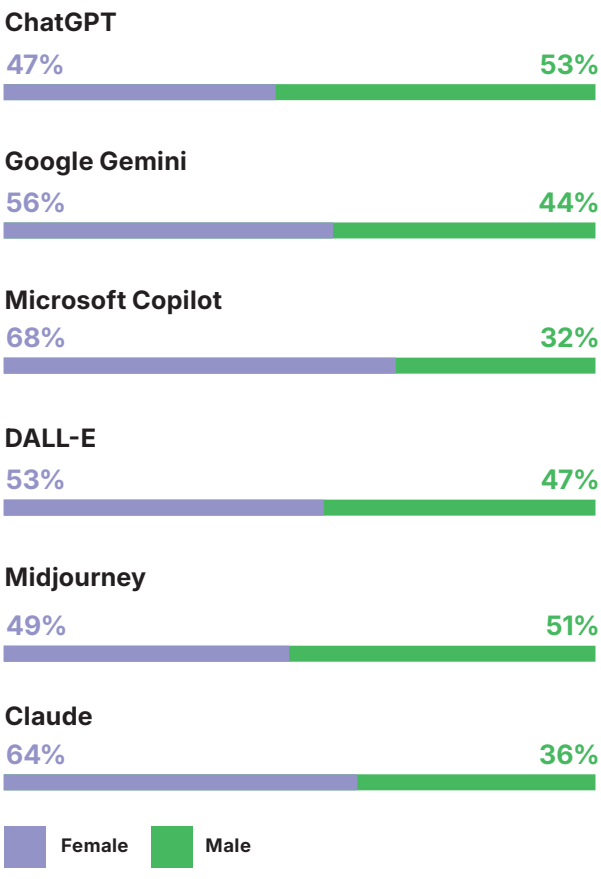
NON-USERS WITH GRADUATE DEGREES

44.2%
FEMALE

28.4%
MALE

With a p-value of 0.013, this indicates a meaningful difference in adoption rates between genders (female adoption rate: 58.8%, male adoption rate: 68.4%) that cannot be explained by random variation.

Tool Usage by Gender:



Among women, those with graduate-level education have a lower AI skill index (0.82) than those with only basic education (0.87), suggesting that higher education doesn´t automatically translate to higher AI proficiency for women.

02. Awareness and Usage of Popular AI Tools

While ChatGPT serves as the gateway to AI, Poland's AI landscape is diversifying, with smaller but more dedicated user bases emerging for alternative tools.

Tool Awareness and Adoption

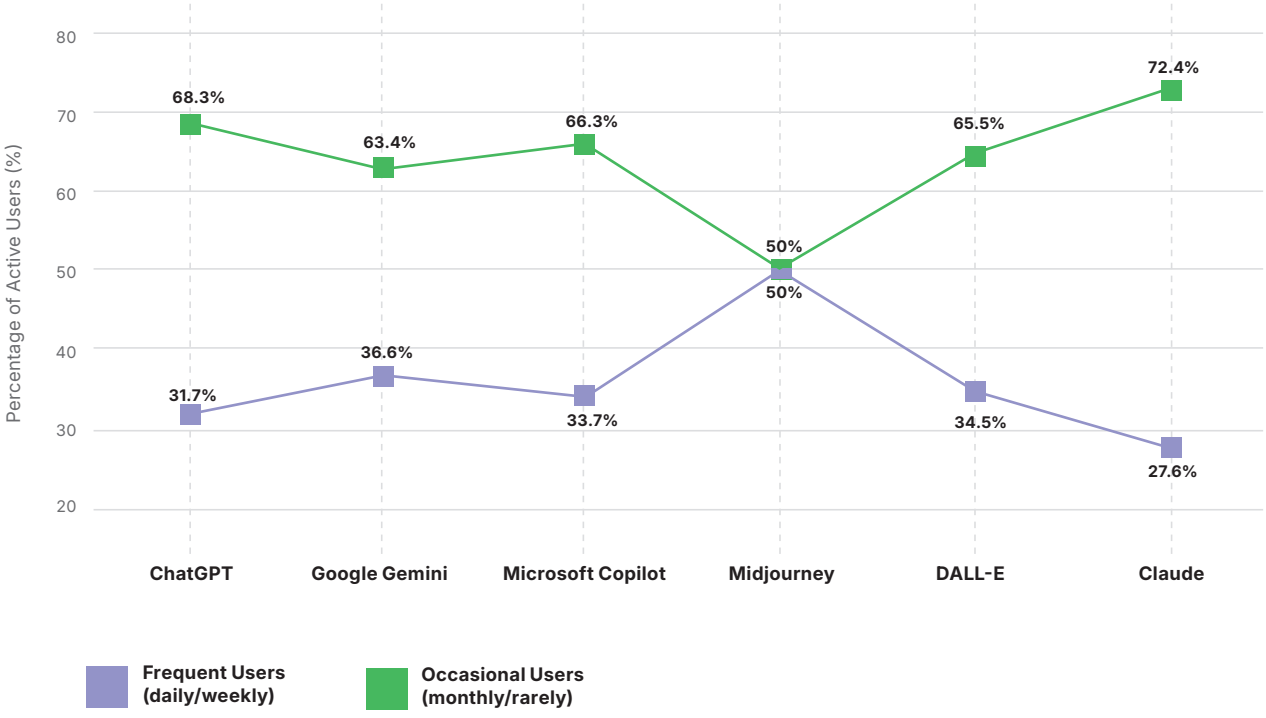
The data reveals a tiered adoption landscape in Poland. ChatGPT dominates with more than half of respondents aware of it, followed by a second tier (Gemini and Copilot with 20–30% awareness), and a third tier of specialized tools (Claude, DALL-E, and Midjourney) with less than 10% awareness.

	AWARENESS	USAGE	CONVERSION RATE	CATEGORY
ChatGPT	54%	84% of those aware	39%	Language Model
Google Gemini	29%	86% of those aware	25%	Language Model
Microsoft Copilot	20%	77% of those aware	15%	Language Model
Claude	7%	71% of those aware	5%	Language Model
DALL-E	6%	78% of those aware	5%	Image Generation
Midjourney	5%	83% of those aware	4%	Image Generation

While ChatGPT has the largest user base by far, Google Gemini shows the highest conversion rate from awareness to usage (85%), suggesting high satisfaction among those who try it.

Usage Frequency

Among active users of each tool, the frequency of use varies significantly:



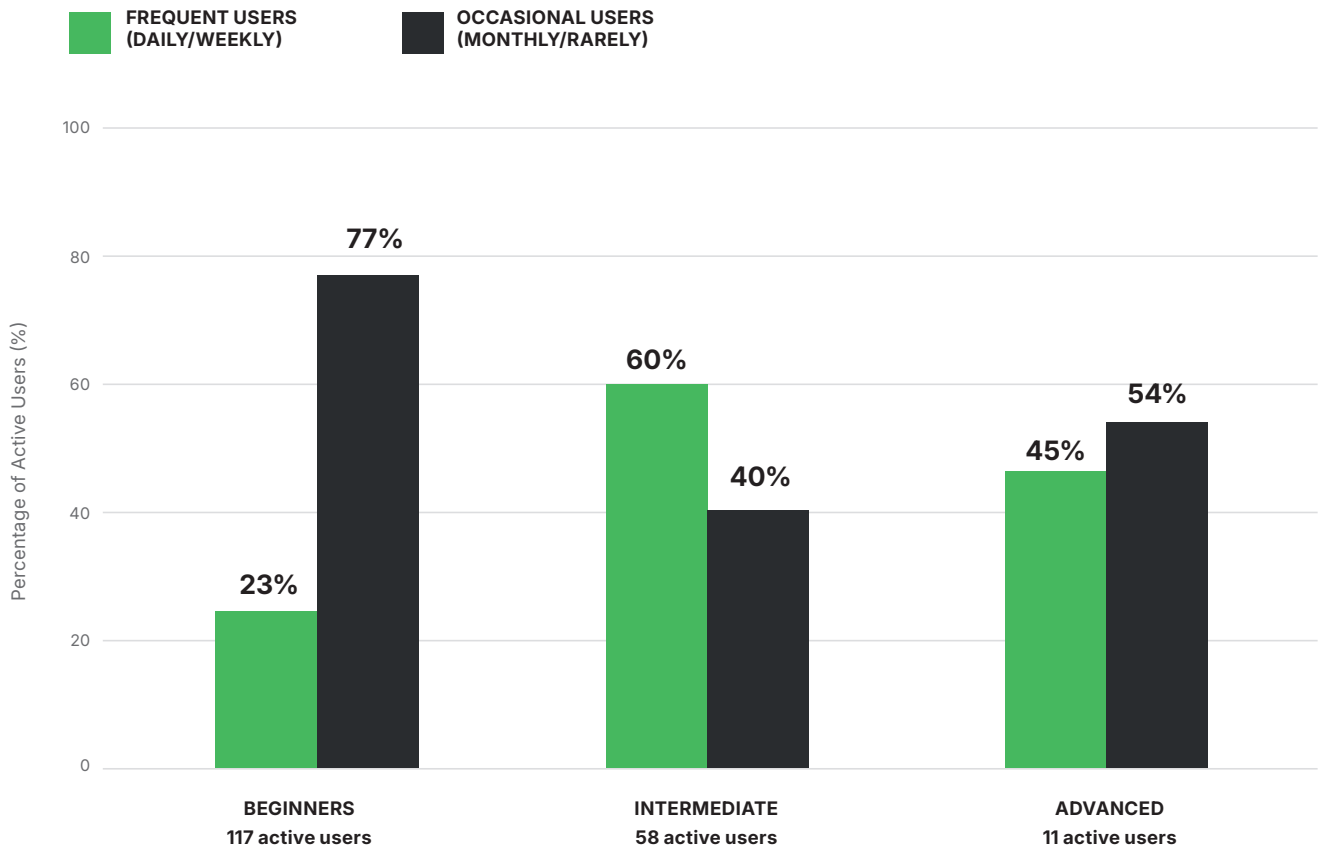
Specialized tools like Midjourney show the highest intensity of use, with half of its users engaging at least weekly. This suggests that while specialized tools have smaller user bases, their users tend to be more engaged and frequent.

Experience Breeds Caution:

Frequent AI users are up to 15% more likely to critically evaluate and modify model outputs compared to occasional users, demonstrating how increased exposure leads to greater awareness of AI limitations.

ChatGPT Usage Frequency by Skill Level

Among active ChatGPT users, there's a striking correlation between skill level and usage frequency. Intermediate users show the highest frequency of ChatGPT usage, with over 60% using it at least weekly. This suggests that as users become proficient, their usage intensifies, but may then become more specialized or targeted at the advanced level.



03. Understanding the Non-Users: The "Hesitant" and the Unaware

While the hesitant group actively avoids AI due to privacy concerns and perceived complexity, the unaware group faces deeper barriers, including a lack of exposure and limited access. Notably, job displacement fears are far stronger among non-users, highlighting an important challenge for future AI education and outreach efforts.

The Two Types of Non-Users

The "Hesitant"
(Aware of generative AI, but still not using it)

Represent **90%** of all non-users.

Know about AI tools but deliberately choose not to use them.

Higher awareness of ChatGPT (**41%**), much lower of Google Gemini (**16%**) and Microsoft Copilot (**10%**).

Not willing to invest in generative AI tools in the future (**59%**), but open to learning about new GenAI tools (**40%**).

The Completely Unaware

Represent **10%** of all non-users.

No recognition of any major AI tools, except for ChatGPT (**18%**), which indicates that it is not recognized as a part of generative AI ecosystem.

Predominantly older (55+) and with lower educational attainment.

More likely to live in rural areas (**27%** compared to **19%** of hesitant non-users).

Not interested in learning about generative AI (only **9%** somewhat agree to) or paying for premium features (**96%** disagree).

Demographics of Non-Users

Age Distribution

Average age of non-users is significantly higher than users.

In the 55–64 age bracket, **62%** are non-users compared to **38%** users.

Among younger demographics (18–24), only **31%** are non-users.

Gender Split

Women represent **59%** of non-users compared to men (**41%**)

Gender gap is especially pronounced among the completely unaware segment (62% women)

Education Level

Among non-users, **42%** have only completed secondary education or less.

Only **35%** of non-users have university degrees, compared to **58%** of users.

The typical non-user in Poland is more likely to be female, over 45 years old, and with lower educational attainment. The awareness gap is most pronounced among older women with secondary education or lower.

Primary Barriers to Adoption

For the "Hesitant"

67%

PRIVACY AND SECURITY CONCERNS
express high concern about data privacy.

68%

RELIABILITY ISSUES
worry about receiving incorrect information.

64%

SKILL GAP PERCEPTION
believe AI tools require technical expertise that is difficult to learn.

77%

CRITICAL THINKING CONCERNS
worry about people losing the ability for critical thinking.

57%

PERCEIVED LACK OF RELEVANCE
don't see how AI tools apply to their daily lives.

For the Completely Unaware

TECHNOLOGY AVOIDANCE
73% generally avoid adopting new technologies.

INFORMATION GAP
Simply lack exposure to AI concepts and tools.

LACK OF INTEREST
55% are not open to learning about generative AI even though only **23%** think it is difficult.

PERCEIVED LACK OF RELEVANCE
86% don't see how AI tools apply to their daily lives.

EXCLUSION FROM THE DISCOURSE
The majority of unaware non-users have no opinion on ethical, legal, or social issues regarding generative AI.

Trust Issues Among Non-Users

72% of hesitant non-users believeAI-generated content cannot be trusted.

68% express concerns about AI's impact on truth and information reliability.

Job Displacement Concerns

81% of all non-users worry about AI replacing human jobs.

This concern is **23%** higher among non-users than users.

Such concerns are strongest among those in administrative and service roles.

04. Use Cases and Motivations: Why Poles Use AI

While creativity is a growing use case—especially among advanced users—the overall trend suggests that AI in Poland is less about fascination with innovation and more about immediate, real-world utility.

Primary Use Cases

Polish users leverage generative AI primarily as a productivity enhancer and knowledge tool, with a strong focus on practical applications.

48%

cite time-saving and productivity as their main motivation.

Document drafting and content creation emerge as key applications, with users regularly employing AI to prepare initial drafts and enhance their written communication.

Information gathering stands as another critical function, with users turning to AI to research topics and summarize content (**36.7%** use AI for problem-solving and decision support).

Creative applications also feature prominently, with over a quarter (**27.2%**) using AI for entertainment and creative purposes, including generating stories and artistic content.

Task automation represents a growing use case (**15.9%**), suggesting users are increasingly delegating routine communications and repetitive writing tasks to AI assistants.

Tool Selection by Use Case

Different AI tools show distinctive patterns of use for specific tasks:

ChatGPT
dominates as a versatile tool used across all categories,
but especially for writing (82.4%), research (77.3%), and learning (72.6%).

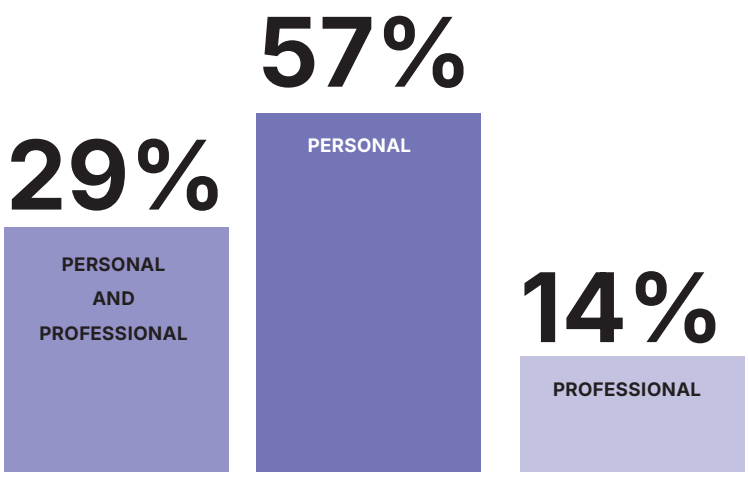
Google Gemini
shows particular strength in information finding (64.8%).
and translation (58.3%).

Microsoft Copilot
is predominantly used for professional document creation (68.7%).
and programming (63.2%).

DALL-E and **Midjourney**
are almost exclusively used for creative content
generation (89.3% and 94.7% respectively).

Notably, the majority of Polish users (57%) employ AI primarily for personal purposes, 29% for both personal and professional, and no more than a modest 14% for professional purposes only.

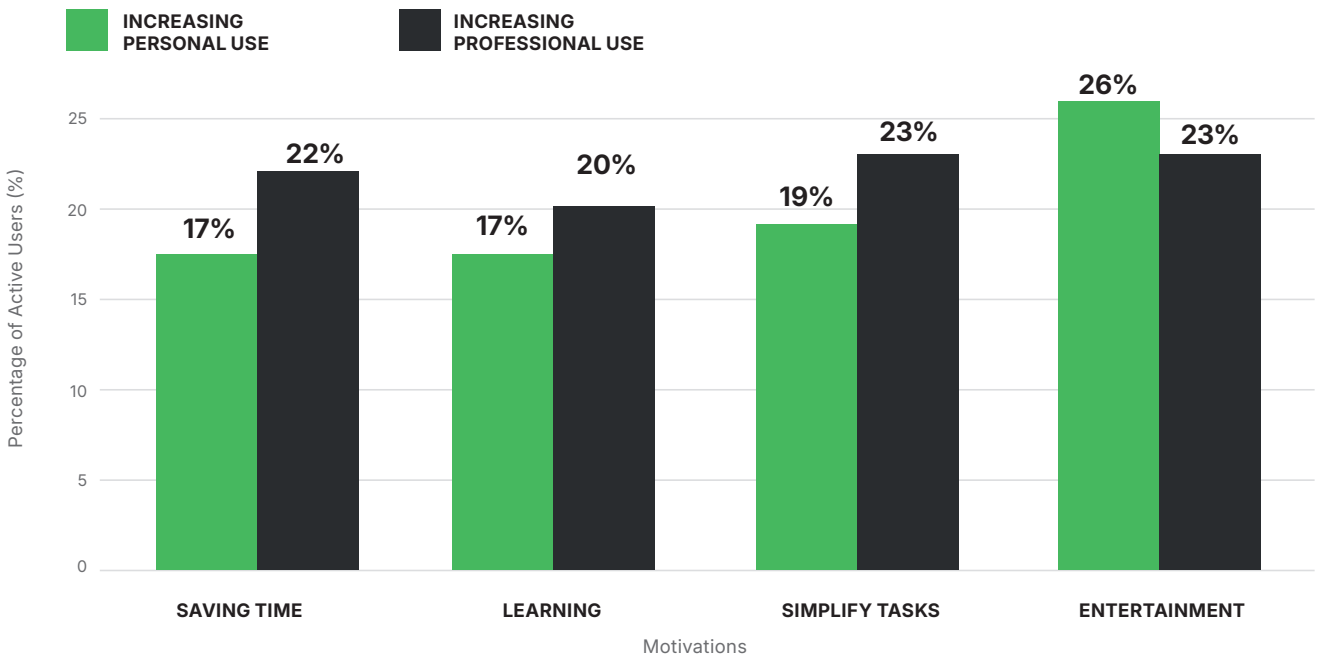
Polish users overwhelmingly adopt AI for practical, everyday tasks that deliver tangible benefits.



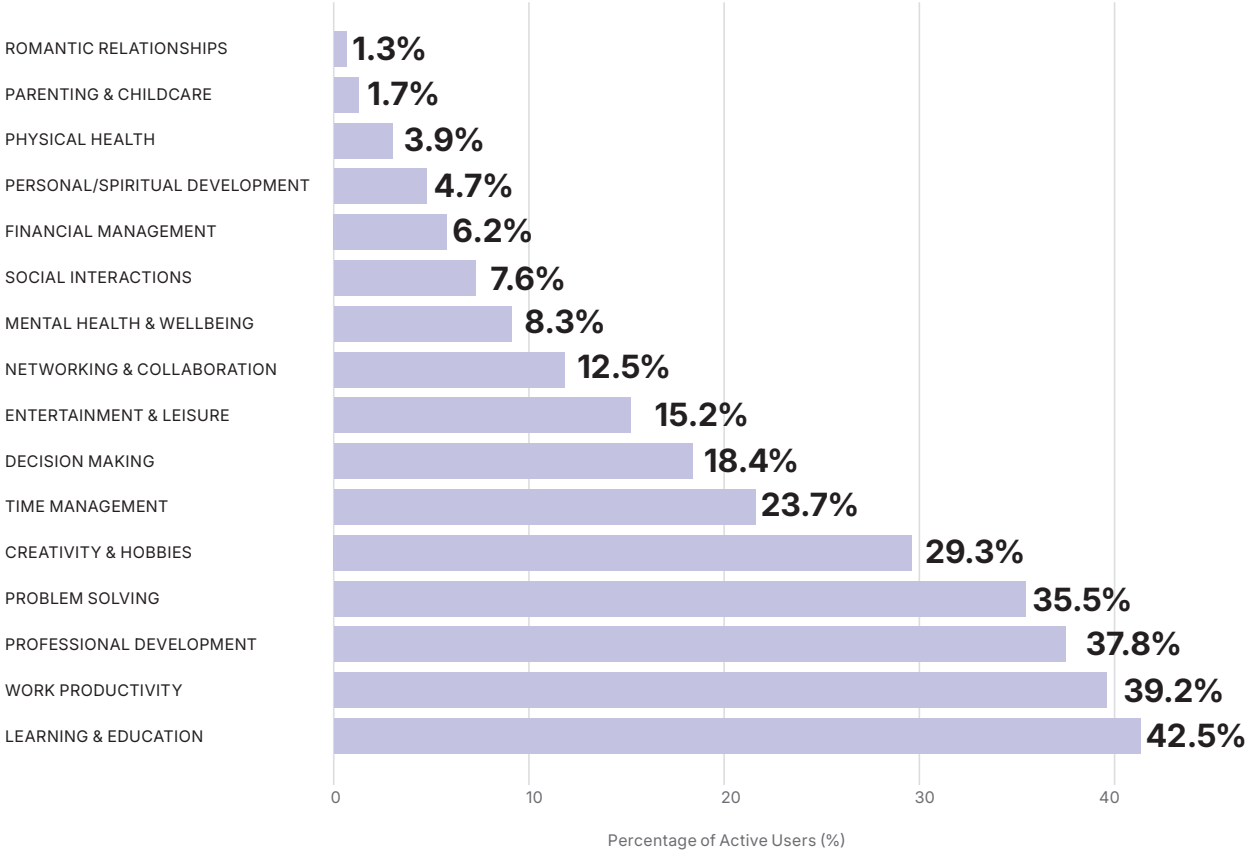
This detailed picture of AI usage in Poland shows a pragmatic population primarily focused on productivity gains and learning enhancement, with creative applications becoming more important among advanced users. The data suggests that AI adoption is driven by practical needs rather than technological curiosity, with tools that deliver clear benefits in everyday tasks seeing the highest and most consistent usage.

Poland is past the early exploration phase–AI is becoming an everyday tool, but its full professional potential is still untapped outside of expert circles. The next frontier? Bridging the gap between personal use and workplace integration.

Motivation Breakdown for Increasing AI Use (Poland)



Saving time is the top motivation in both cases, but it plays a slightly bigger role in professional settings. Learning and simplifying tasks are also significant drivers across both contexts, whereas amusement is a notably stronger factor for those looking to expand their AI use in personal life.



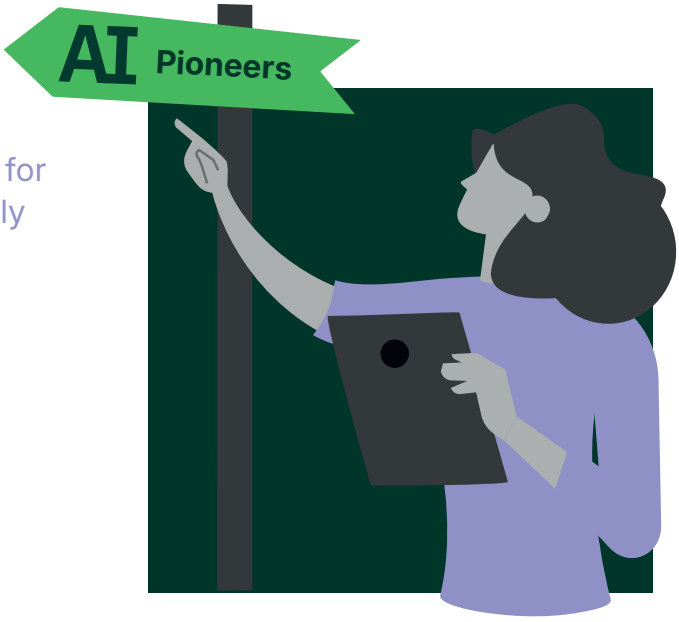
05. Skill Development Patterns: From Hesitant to Power User

The path from hesitant to power user in Poland follows a distinct trajectory, with some users rapidly integrating AI into their routines while others take longer or remain casual users. While nearly 40% of advanced users adopt AI within the first six months, beginners tend to experience a much slower transition, often hesitating before making AI a regular part of their workflow.

The data shows a clear "confidence gap" in AI adoption. While 77.6% of advanced users transition to regular use within a year of first trying AI tools, only 46.1% of beginners make the same transition, with nearly a quarter remaining casual users. This suggests that perceived competence significantly accelerates the path to regular AI usage.

18% of Polish users tried generative AI for the first time just when it became widely available (around 2 years ago), with

35% of these early experimenters immediately becoming regular users.



Highest Learning Appetite

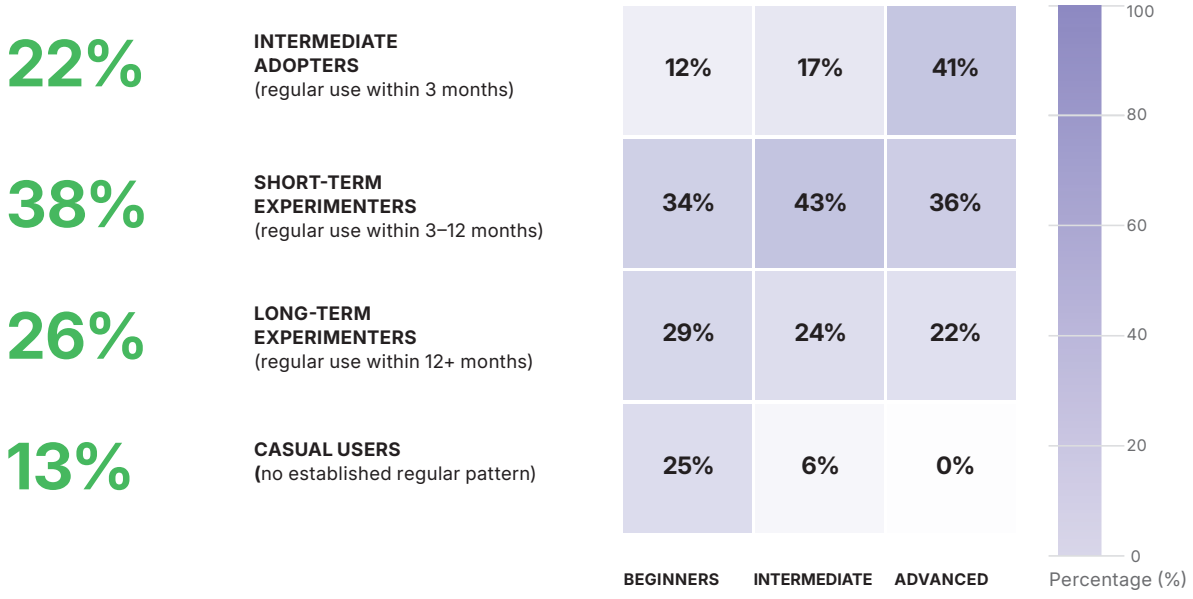
58.4% of Polish respondents want to learn more about AI—the highest of any surveyed country during this research. This indicates a market that values knowledge and skill development in emerging technologies.

Early Adopter Foundation

18.6% of Polish users were early adopters who started using GenAI 1.5-2 years ago, providing Poland with a solid base of experienced users who can potentially serve as advocates and mentors to new adopters.

Transition Timeline Categories

Advanced users tend to adopt regular usage patterns more quickly, with 48.7% becoming regular users within 6 months compared to 31.9% of basic users. Casual users (those who try but don't use regularly) make up nearly 10% of basic users but less than 1% of advanced users.



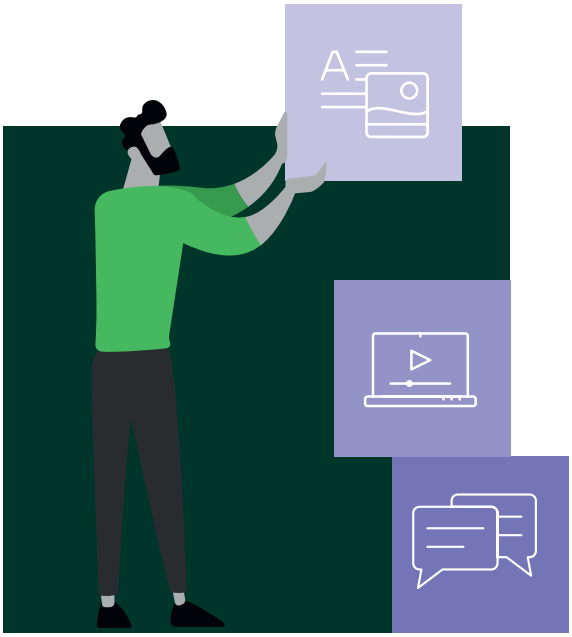
Poland has a market of "enthusiastic pragmatists"—users who are eager to adopt and learn about GenAI, but who make practical distinctions between contexts where premium features deliver clear value (professional) versus where they don't (personal). The extremely significant relationship between skill level and professional application confirms that as users become more proficient, they substantially shift their AI usage toward professional contexts.

This pragmatic enthusiasm makes Poland an ideal test market for new GenAI products and services, particularly those with business applications or educational components.

Usage Frequency and Tool Progression

As users progress in skill level, they show distinct patterns in tool usage:

TOOL TYPE	BEGINNERS	INTERMEDIATE	ADVANCED
CONVERSATIONAL AI	57.3%	32.8%	13.4%
TEXT–TO–IMAGE	25.5%	41.8%	32.7%
CODE GENERATION	35.6%	35.6%	28.8%
VIDEO GENERATION	24.4%	44.4%	31.2%
AUDIO/MUSIC GENERATION	39.3%	33.9%	26.8%



Conversational AI tools (like ChatGPT) are predominantly used by beginners (53.7%), while more complex tools like text-to-image and video generation show higher representation of intermediate and advanced users.
This suggests a natural progression path as skills develop.

06. Use Patterns and Future Intentions

Looking ahead, the Polish market shows strong potential for growth and monetization. High conversion rate from awareness to active use suggests that expanding knowledge about less familiar AI tools could unlock new adoption waves. Additionally, a premium user base is emerging, with 21.7% of respondents willing to pay for advanced AI services.

Content Modification Patterns

86.3%
of Polish AI users modify content.

MOST USERS MODIFY AI CONTENT
86.3% of Polish AI users modify content to some degree, with only 13.7% using AI outputs without changes.

EXPERTISE DRIVES MODIFICATION
As skill level increases, users modify AI content more substantially:

7 times more

Advanced users are nearly 7 times more likely to make heavy modifications than beginners (26.0% vs. 4.2%).

Only 3.8% of advanced users use AI content without modification, compared to 22.3% of beginners.

PROFESSIONAL VS. INFORMATIONAL USE
Content for professional purposes receives substantially more modification (60.8% partial/heavy modification) than content used for information gathering (only 26.6% partial/heavy modification).

Future Adoption Plans

56.2%
increase their use of generative AI in their personal lives.

51.9%
increase their use of generative AI in their professional lives.

Polish respondents demonstrate significant openness toward increasing their generative AI usage in the future. The data reveals a clear pattern of intended adoption growth across both personal and professional contexts:

PERSONAL AND PROFESSIONAL USAGE INTENTIONS
More than half of respondents intend to increase their use of generative AI in both their personal lives and in their work environments in the future.

COMPARATIVE ENTHUSIASM
The slightly higher enthusiasm for personal usage (4.3 percentage points difference) suggests that Poles may perceive fewer barriers to adoption in their personal activities than in professional settings.

Even among current non-users, 37.4% express intention to start using AI tools in the future, indicating significant potential for market expansion.

Willingness to Pay for Premium AI Services

The survey reveals valuable insights about potential monetization of AI tools in the Polish market:

16.2%

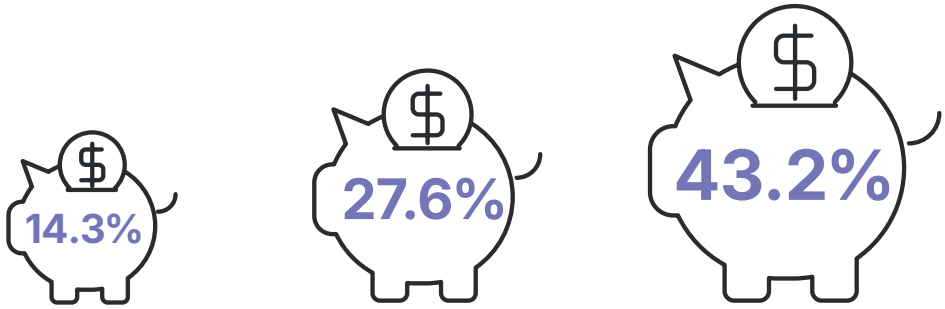
Only 16.2% of respondents consider it likely or very likely they would pay for premium versions of AI tools.

58.7%

The majority (58.7%) indicate low probability of paying for premium AI services 25.1% remain neutral on the question of paying for premium features.

When comparing current users vs. non-users, a significant gap emerges: 24.8% of current users are willing to pay for premium features while only 7.6% of non-users express a willingness to pay.

User skill level strongly correlates with payment willingness:



Self–identification as a technology early adopter shows one of the strongest correlations with payment willingness ($p < 0.001$):

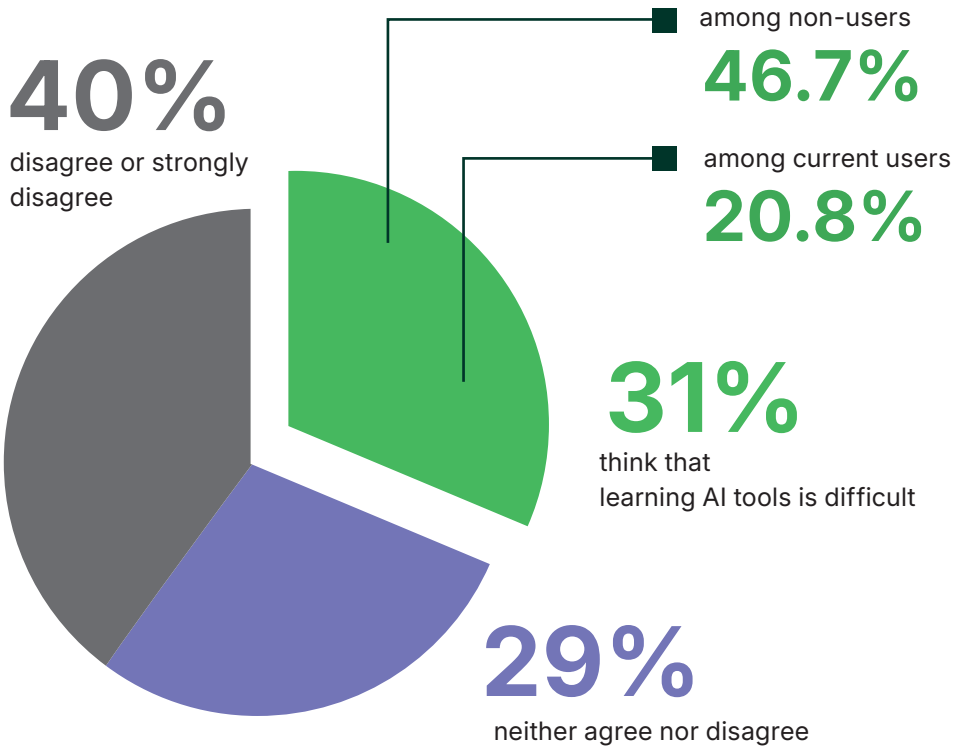
38.7% Self-identified early adopters: high willingness to pay.

12.3% Non-early adopters: high willingness to pay.

This 3.1x difference indicates that early-adopter identification is a powerful predictor of monetization potential and could be used as an effective targeting variable for premium offerings.

Perceived Learning Barriers

The perception that "learning to use generative AI tools is difficult" varies significantly among respondents:



This perception gap represents one of the most significant barriers to adoption.

Early Technology Adoption Tendency

36.8%
of all respondents consider themselves early technology adopters.

Respondents who identify as early technology adopters (those who "usually try new technologies before others") show markedly different AI adoption patterns:

Among current AI users
52.4%
identify as early adopter

Among non-users, only
21.1%
identify as early adopters.

This strong correlation between general technology adoption tendencies and AI usage suggests that expanding the user base beyond technology enthusiasts will require focused efforts on reducing perceived barriers.

Methodology

The objective of this research was to capture the state of generative AI and human interactions in the early stages of this technology's development.

Survey Overview

A survey was conducted among nearly 2,000 respondents from the general population across four countries: the United States, the United Kingdom, Spain, and Poland, aiming to reflect the sentiments of the broader population.

Respondents were reached via an online survey distributed through the **SurveyMonkey** platform, with sample recruitment supported by **Netquest**, an impartial sample provider, and its partner panels. The sample composition followed each country's census data, with a maximum variance of **5%** in basic demographics (age and gender splits).

The survey was conducted between **December 2024 and January 2025**. The **average interview length was 5 minutes**, designed to minimize respondent fatigue while ensuring high-quality responses.

Participants answered the survey in their **native language**. The questionnaire was translated using **generative AI**, with **human native speakers** proofreading the final translations. All results are presented in English.

Sample Size

- **US:** *n=552*
- **UK:** *n=413*
- **Spain:** *n=414*
- **Poland:** *n=584* (+ an additional *n=650* in the Generative AI Early Adopters Subgroup)

Survey Structure

The questionnaire covered the following key areas:

- **Demographics**
- **Familiarity and Tools**
- **Use Cases**
- **Adoption Journey**
- **Impact**
- **Concerns**
- **Future Outlook**

Subgroup Definitions

- **Users** – Respondents who reported using generative AI.
- **Frequent users** – Respondents who reported using any generative AI tool at least several times a week.
- **Tool users** – Respondents who recognized and used a given AI tool.
- **Age groups** – Categorized based on demographic data.
- **Beginner / Intermediate / Advanced users** – Defined based on self-reported skill level. The original categories **"Advanced", "Expert",** and **"Professional"** were merged into one due to the small number of respondents in these groups.

Additionally, in **Poland**, an extended survey was conducted using the **snowball method** among **generative AI early adopters and enthusiasts**, providing deeper insights from highly engaged individuals who voluntarily contributed their opinions.

Notes on Data Interpretation

When referring to subgroups, scores represent the **percentage within the given group**.

In questions related to **interactions with enerative AI**, scores refer to **users** of this technology.

Scores and subgroups representing **fewer than 5%** of the sample were generally omitted due to the limited sample size. However, in the most general split between **users and non-users**, all subgroups were retained to avoid an inaccurate implication of a total absence of certain respondents.

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