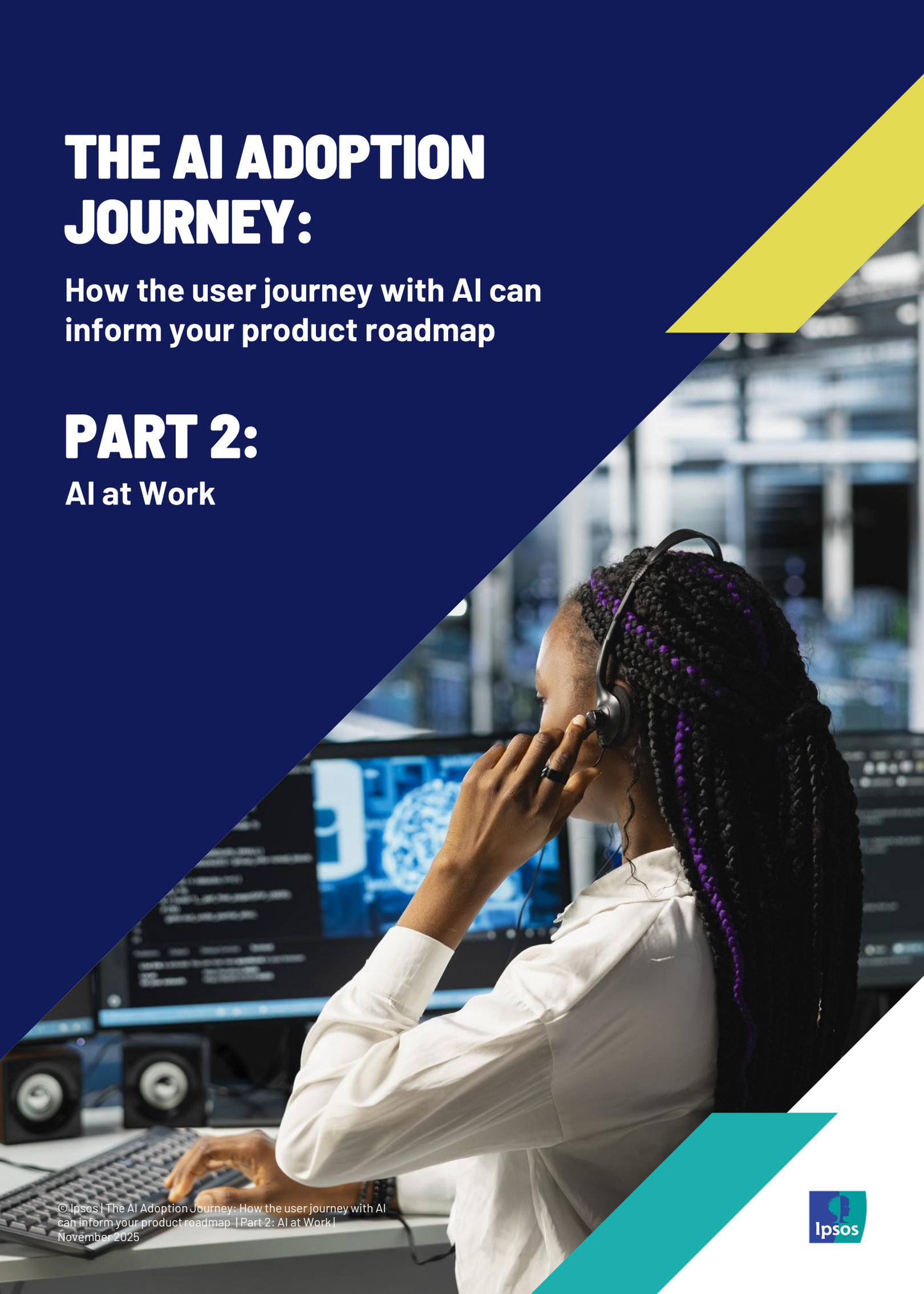
THE AI ADOPTION JOURNEY:

How the user journey with AI can inform your product roadmap

PART 2:

AI at Work



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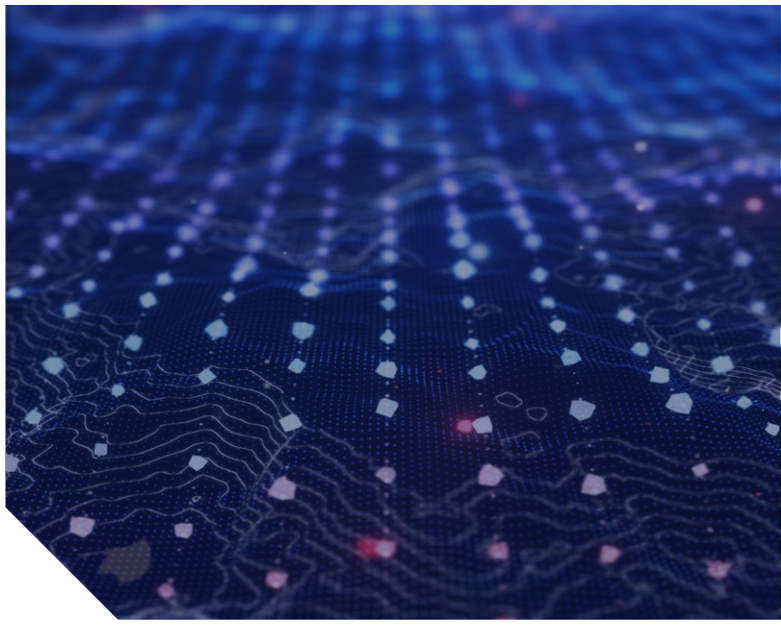
AI AT WORK: PROFESSIONAL AI ADOPTION IN FIVE GLOBAL MARKETS

Introduction

The AI Adoption Journey: How the user journey with AI can inform your product roadmap is a series developed by Ipsos' UX practice, that explores how users in the United States, Brazil, France, India and the Philippines are ramping up their use of AI. In this series, we explore AI adoption and the implications for teams developing AI-enabled products and services for global audiences.

In Part 1: AI at Home, we explored adoption of AI by people in their personal lives. We revealed how AI is rapidly becoming a tool for people to save time and learn new things. We also introduced the "Correction Tax", the tax on users who have to fact-check and edit AI outputs. Based on the insights from different markets**, AI at Home** highlighted the need for localization of AI-enabled products to align the product design with the variety of cultural differences across the markets we surveyed.

In **Part 2: AI at Work**, we dive deep into users' perceptions towards AI and the tensions of the positives and negatives that AI creates in the workplace. We explain the "Paradox of the AI Economy" that users experience as they wrestle with these tensions. After addressing the user mindset, we'll examine the realities of daily usage in different markets, and the pain points users encounter using AI for work including the different payment models for AI subscriptions. Finally, we'll offer recommendations to help designers and developers create better AI-powered tools for work.



User sentiment and tensions in the workplace

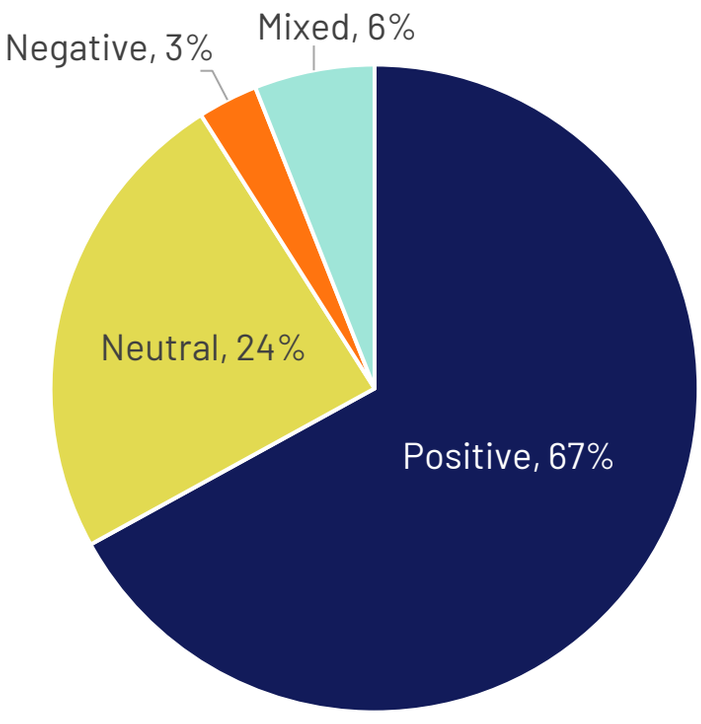


Figure 1. Sentiment analysis of users toward AI averaged across all markets.

Part 1: AI at Home established a clear overlap between personal and professional AI use, revealing that experiences with AI at home directly shape expectations and preferences for AI at work. Therefore, to really understand the current and potential role of AI at work, we must first examine people's broader thoughts and feelings about the technology as a whole.

Sentiment analysis based on how people would describe AI to a friend (data from all five markets is combined on Figure 1) reveals a highly favorable public perception of AI, with positive sentiment as the dominant attitude. The primary challenge for stakeholders is likely to engage the large neutral group, while the negative sentiment is currently a very minor concern.

Across all markets, most users agree that AI helps them complete tasks more quickly, improves work quality, and enables new skills at work. Figure 2 shows the average sentiment as a bold line and the significant market outliers plotted on either side of the bold line. Generally, India and Brazil show the highest levels of agreement with all statements, plotting to the right of the average sentiment line. France, on the other hand, consistently shows the lowest. Notably, agreement is weakest across all markets for the statement "AI makes my job more enjoyable."

The tensions of AI at work

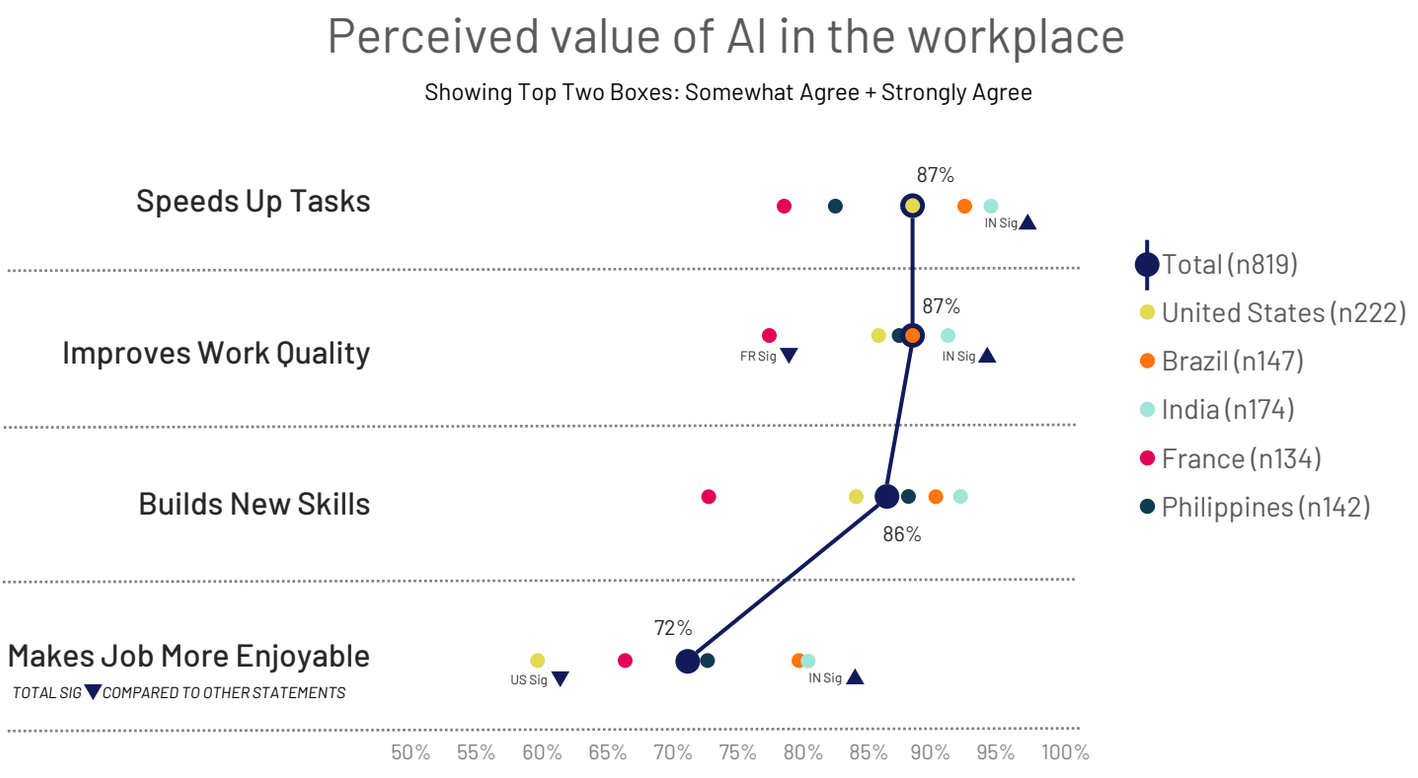


Figure 2. User attitudes in five markets about the impact of AI at work.

On more complex issues, data shows contrasting viewpoints or "schools of thought" regarding Artificial Intelligence.

Figure 3 on the next page illustrates those contrasts and highlights the dual and often contradictory nature of public and/or expert perceptions of AI. Each horizontal line in the figure represents a core theme identified in the verbatims. The left side of each bar, colored in green, represents the positive or favorable view associated with the theme (e.g., "Assistive Tool," or "Reliable Assistant,"). The right side of the bars, colored in red, represents the opposing, negative or unfavorable view (e.g., "Job Replacement," or "Unreliable Output").

The number shown in the center of the bar indicates the percentage of all coded verbatims that expressed an opinion related to that specific theme, regardless of whether the opinion was positive (green) or negative (red). This shows that 33% of the verbatims spoke of AI as either an "Assistive Tool" or "Job Replacement" and highlights the tension of AI's role in and effect on work.

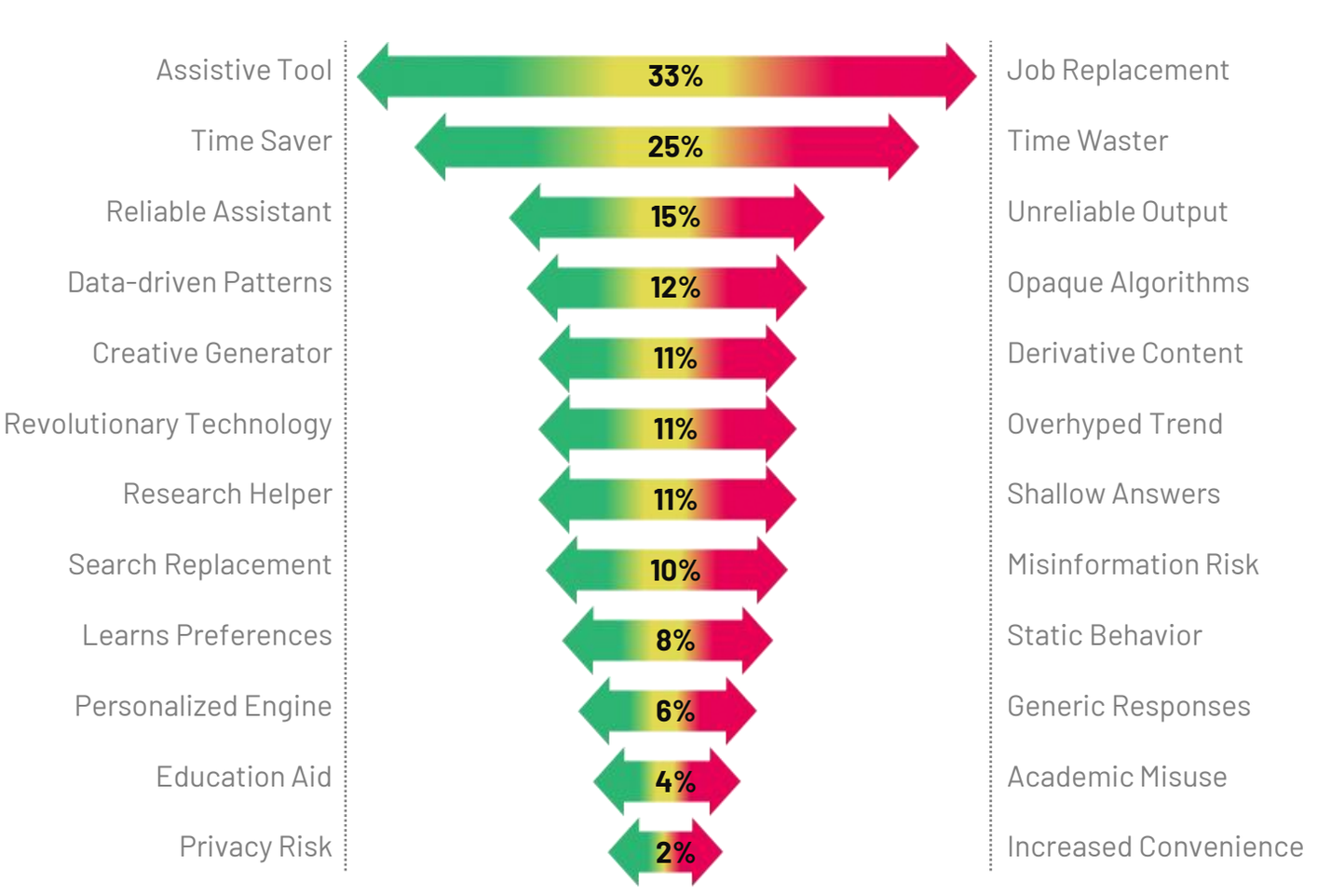


Figure 3. Tensions between user perceptions of AI ranked top to bottom from most prominent to least prominent and left to right from positive to negative.

We see tensions and dichotomies in public perception of AI, covering its impact on the workforce, utility, reliability, transparency, creativity, and more.

The data suggests that public perception of AI is largely focused on high-stakes, practical consequences and trust issues. The central debates are:

Economic/Societal Fear: Will AI take jobs?

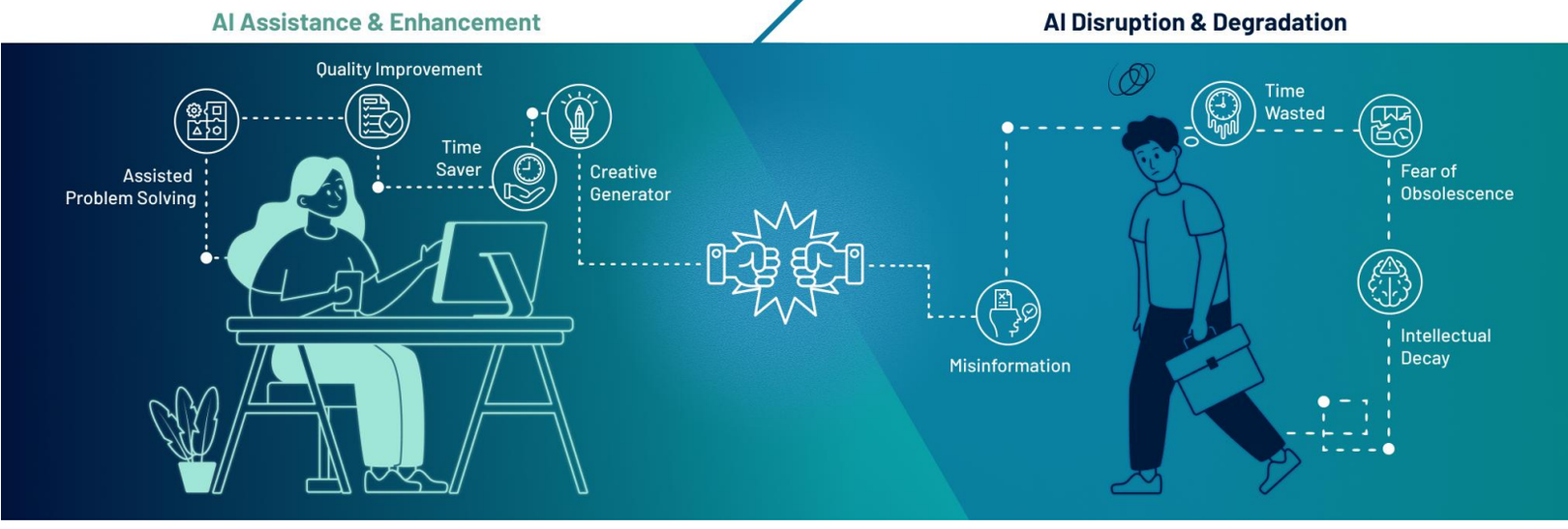
Productivity/Value: Is AI a net gain in efficiency or a complication?

Trust/Integrity: Is AI reliable, transparent, and capable of generating original thought?

The high ranking of Job Replacement and Time Waster indicates that the most common frames for discussing AI are economic disruption and practical utility failure.

As one participant noted, AI is helpful, but there are real worries that it could cause a loss of cognitive and problem-solving skills and take jobs from humans if tools are built to replace human intelligence versus augment it.

> I use the free version occasionally to summarize a long text, but I would not pay for it. My concern is more philosophical: if we become too dependent on AI, we risk losing our critical thinking skills. It is essential that these tools are built to assist, not to replace, human judgment. I need to feel that I am in control and that it is simply augmenting my own intelligence." **PFRA011**



The Paradox of the AI Economy

Many users believe they must use AI to remain competitive at work and avoid job displacement. On the other hand, employers have not universally adopted AI as an enterprise tool. That drives some people to personally pay for AI to use at their jobs as shown in Figure 4 below.

> My company is still in endless meetings 'evaluating' AI. I can't afford to wait. I pay for the premium subscription myself because it saves me at least an hour every day on coding and documentation. For me, it's a necessary personal expense to do my job better; the company hasn't caught up yet." **PUSA076**

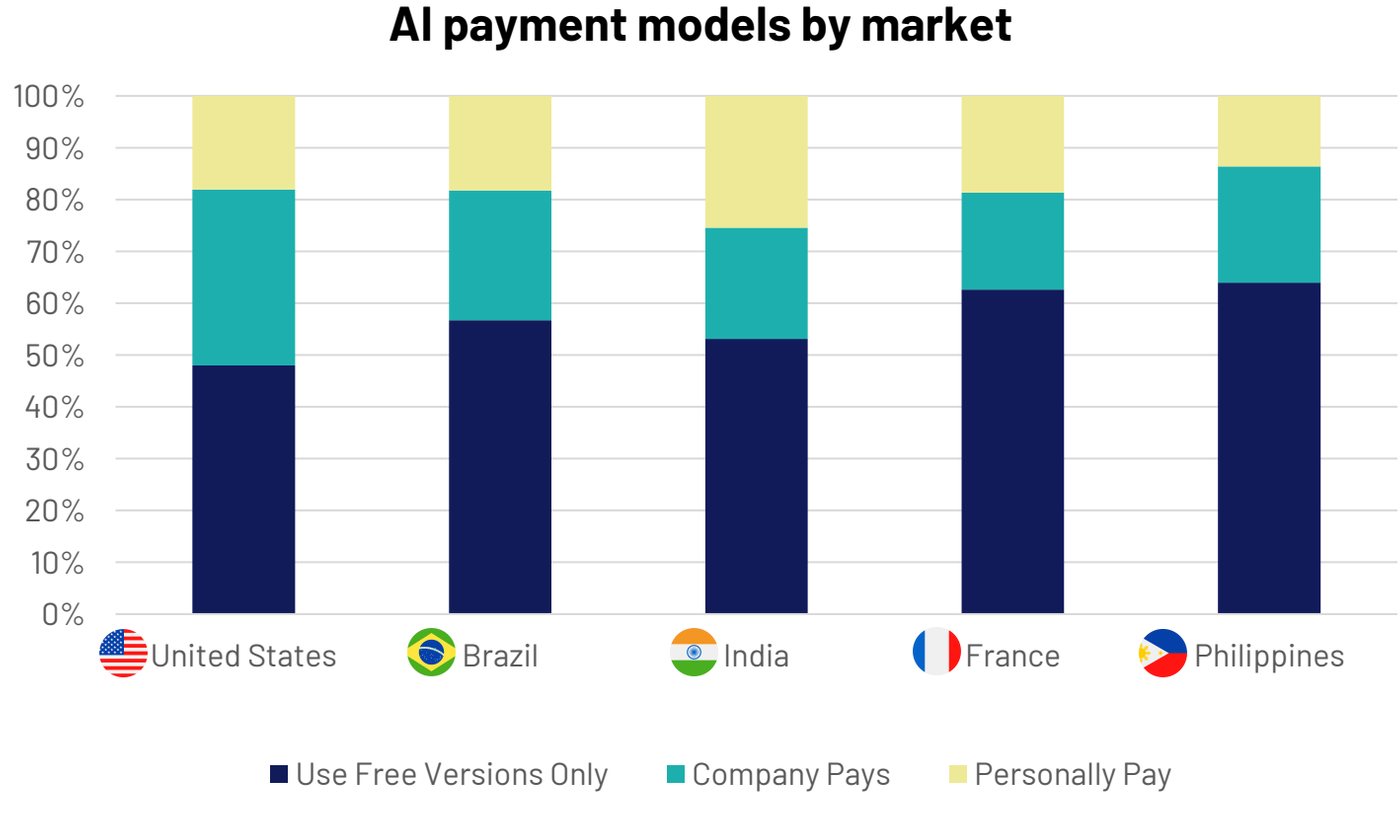


Figure 4. A comparison of AI subscription payment models in the five markets.

Frequency of work-related AI tool usage

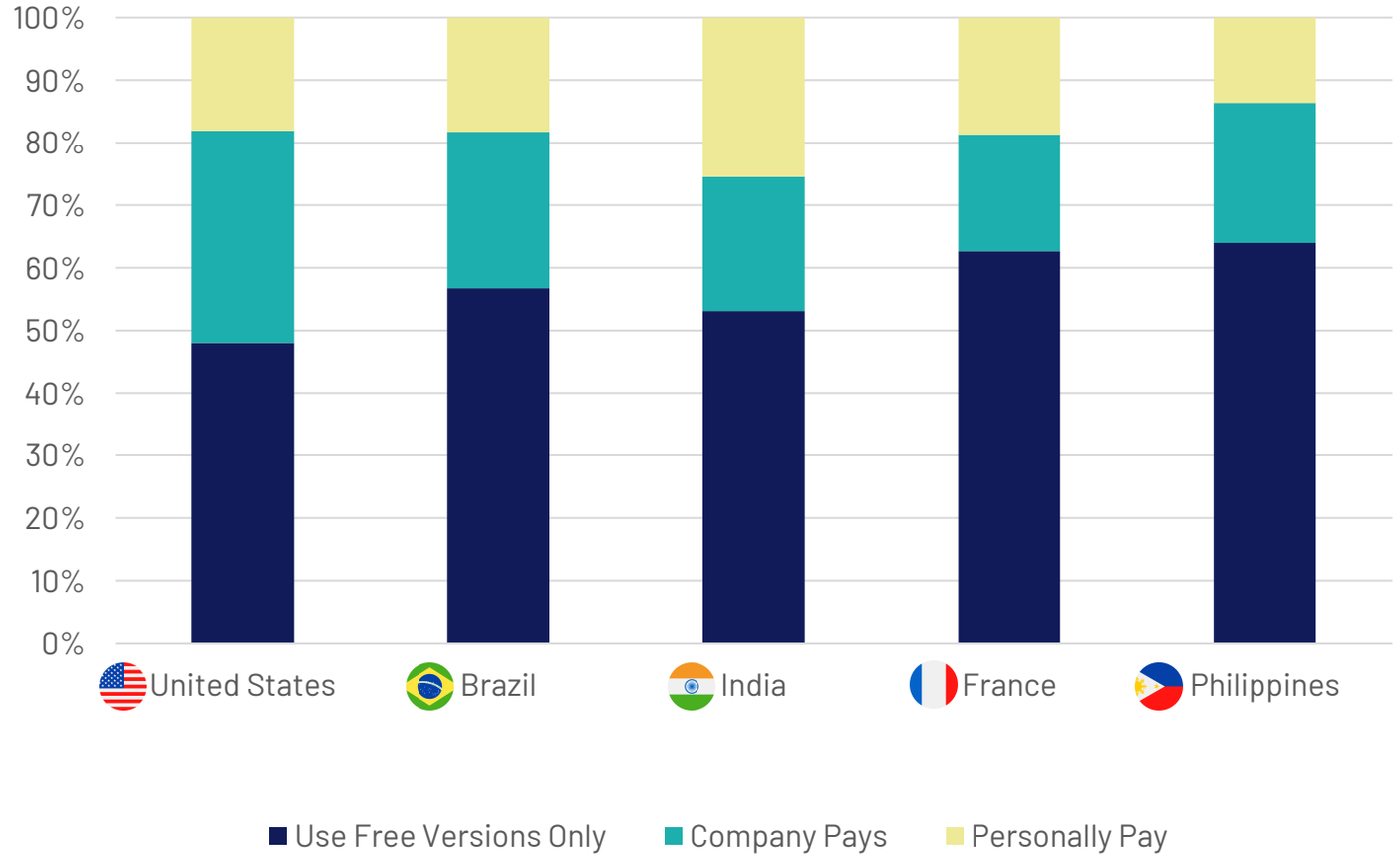


Figure 5. Frequency of AI tool usage by market.

Paying for AI at Work

Users in India report the highest frequency of paying for AI personally to use at work with 25.9% of users paying for AI themselves. In France, Philippines and Brazil, most people using AI at work use free versions. The Philippines is the leader in this trend with 66.2% of work users turning to free versions of AI tools for work and only 23.2% having their AI tools paid for by their employer. France is close behind with 62.7% of users opting for free AI tools for work and the lowest percentage of users who have employers paying for their AI tools. While the U.S. has the highest percentage of users, 34.7%, indicating their employer pays for their AI tools at work, there is still a large contingency, almost half, of users using free versions.

Frequency of AI usage for work tasks

Like the trends we saw in personal usage, India leads in frequency of use with 85.6% of users saying they employ AI for help at work either daily or weekly. At the other end of the spectrum, France has 61.2% of users accessing AI for help on a daily or weekly basis. While frequency of use varies, motivations do not. The top motivation for using AI at work in every single market is "To increase my productivity and efficiency." Other key drivers include improving communication quality, problem solving, or seeking advice.

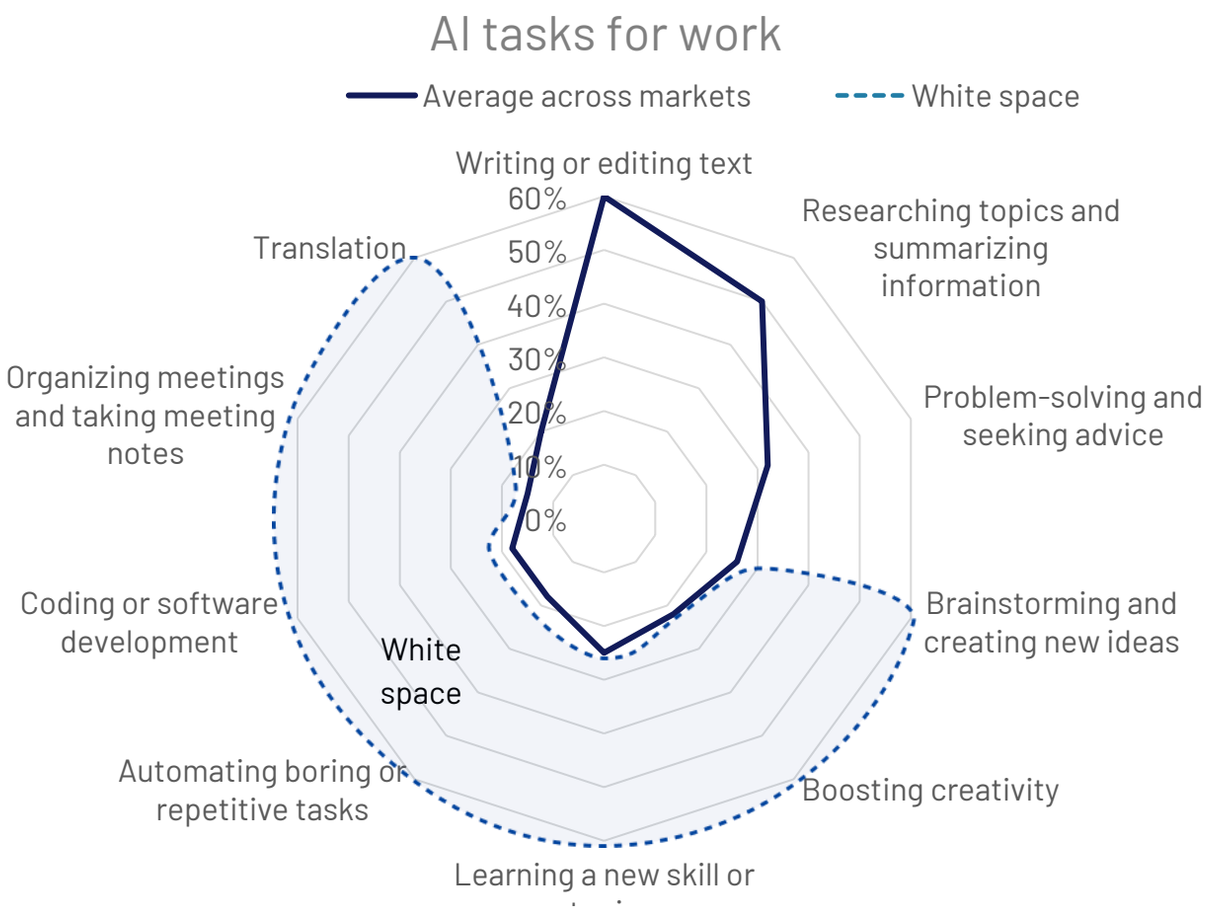


Figure 6. A spider plot showing how AI is used by people at work and the white space where usage is currently low.

How workers are using AI in their jobs

Most common AI tasks: The peak in our data suggests that the current strength and primary application of AI in the workplace lies in information processing and content generation (e.g., writing or editing text & researching topics and summarizing information).

AI tasks done less often: While usage is not as common, users are leveraging AI at work for tasks involving creative or complex problem-solving (e.g., problem solving and seeking advice, brainstorming and creating new ideas, and translation).

Infrequent AI tasks (The "White space"): Areas where AI is currently *underutilized* or not yet fully integrated into workflows include a variety of tasks, (e.g., organizing meetings and taking meeting notes, coding or software development, automating boring or repetitive tasks, learning a new skill or topic, and boosting creativity).

This shows that employees predominantly view and use AI as a content engine and research assistant. The biggest strategic opportunity, the "White space", lies in administrative activities, automation, and core repetitive task management. It's counterintuitive to AI's strengths that the lowest usage is for automating boring or repetitive tasks. This suggests that future AI deployment and training efforts should focus on integrating AI into these routine, high-frequency, and time-consuming operational tasks to maximize productivity gains.

Pain points for users at work

Users encounter several pain points using AI at work, including the same “Correction Tax” we noted in Part 1. They find that AI often hallucinates with confidence, making them wary about using AI outputs without thorough review.

A significant number of users report needing to edit AI outputs "Always" or "Often." This is most pronounced among users in the Philippines (58.5%) and India (50.6%). The time spent correcting AI outputs sometimes causes abandonment. More often, though, users simply recognize that time spent rewriting prompts and editing AI-generated content is the cost of using the tool. The benefits of AI’s ability to handle large amounts of data, automate repetitive tasks and improve the quality of their communications outweigh the drawbacks.

> For research, it’s fast, but I've learned you have to be very careful. It can confidently state things that are completely wrong. Now, my process is to get the initial information from AI, but then I have to spend time fact-checking everything from other sources. You have to treat the output as a draft that needs verification, not a final answer." **PIND058**

Another issue raised by users of AI at work is the difficulty of writing effective prompts. As the requests for assistance from AI become more complex, users find it challenging to craft their prompts in a way that gets them the desired results quickly and efficiently. In some cases, it takes many tries before the output matches the expectations of the prompt writer.

> The main challenge is the choice of your words, or prompt, to ask the AI to perform a task. Over time, this improvement in words gets better, thus obtaining more precise and accurate results." **BR023**

This points to the need for faster development of Agentic AI for business workflows to take the burden of prompt engineering off the user, especially for repetitive tasks. AI agents that can be shared and reused also improve consistency across tasks.

Implications for building AI-enabled business tools

To address the three main perceptual tensions discussed in this paper (see Figure 3, namely Economic Impact, Trust & Reliability, and Transparency & Value), companies should consider the following solutions in the design, development, and messaging of AI-powered solutions:

Design for augmentation (not replacement): Product teams and developers must consciously steer their AI applications toward augmenting human capabilities rather than simply automating entire jobs.

- Focus on high-value task enablement: Clearly articulate and demonstrate how the AI tool elevates the user's role, not eliminates it. Provide features that allow the user to apply human judgment or override the AI's suggestion.
- High-quality UX/UI and training: Focus on building intuitive UX design that reduces the learning curve. Offer clear, built-in guidance on the most effective ways to use the tool to maximize time savings and avoid pitfalls.
- Provide control and iteration: Give the user granular control over the output and enable easy, human-directed editing to ensure the final product is unique and aligned with human intent.

Prioritize trust, reliability and safety: The issues of unreliability, misinformation, and shallow answers require utmost attention to quality assurance and accountability.

- Confidence indicators and fallbacks: Where the model is uncertain, include a confidence score or a human intervention. If the AI fails, it should enable questioning of the model or redirect the user to manual alternatives or human support.
- Source citation: For fact-based or research-related tools, display the original data sources, links, or documents used to generate the answer.
- Iterative refinement: Implement feedback loops to continually improve model behavior and encourage users to flag inadequate or shallow responses.

Establish transparency and personal value: Concerns about opaque algorithms and generic responses show that users want clarity and personalization.

- "Show your work" features: Integrate simple, accessible explanations of *why* the AI made a decision (e.g., "We recommended this based on your purchase history and high rating of similar items"). Clearly communicate the limitations and potential pitfalls of the system.
- Customization and feedback: Provide user controls to adjust the AI's behavior and tone. Make it easy for users to teach the AI their style or preferences to reinforce the feeling of a personalized tool.
- Clear data policies: Be transparent about what data is collected, how it is used to train the model, and provide opt-out choices for data collection.

Key Takeaways

01

User sentiment is positive but tense. While most users are optimistic about AI, their enthusiasm is tempered by anxieties about job security, output reliability, and practical value. To succeed, products must directly address these tensions.

02

The payment paradox reveals a market gap. A significant number of motivated users are paying for AI tools out-of-pocket because their employers are too slow to adopt them. This highlights an immediate need for enterprise solutions that are easy to adopt and prove their value to businesses quickly.

03

Current AI use is narrow, leaving a "White space" of opportunity. AI is primarily being used for content generation, not for the boring and repetitive tasks that could offer the biggest productivity gains. The greatest opportunity lies in building tools that automate core operational workflows.

04

The "Correction Tax" is a major pain point. A primary drawback for users of AI at work mirrors the key problem found in use of AI at home. The "Correction Tax" requires workers to spend significant time and effort writing effective prompts and verifying and editing AI-generated content.

05

A clear path for developers: Augment, verify and clarify. To address user tensions and pain points, we have three core recommendations for product teams.

- Design for augmentation, not replacement, to empower users.
- Prioritize trust and reliability with features like source citations and confidence scores.
- Establish transparency by "showing their work" (explaining AI's reasoning) and allowing for greater user customization.

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

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

THANK YOU

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