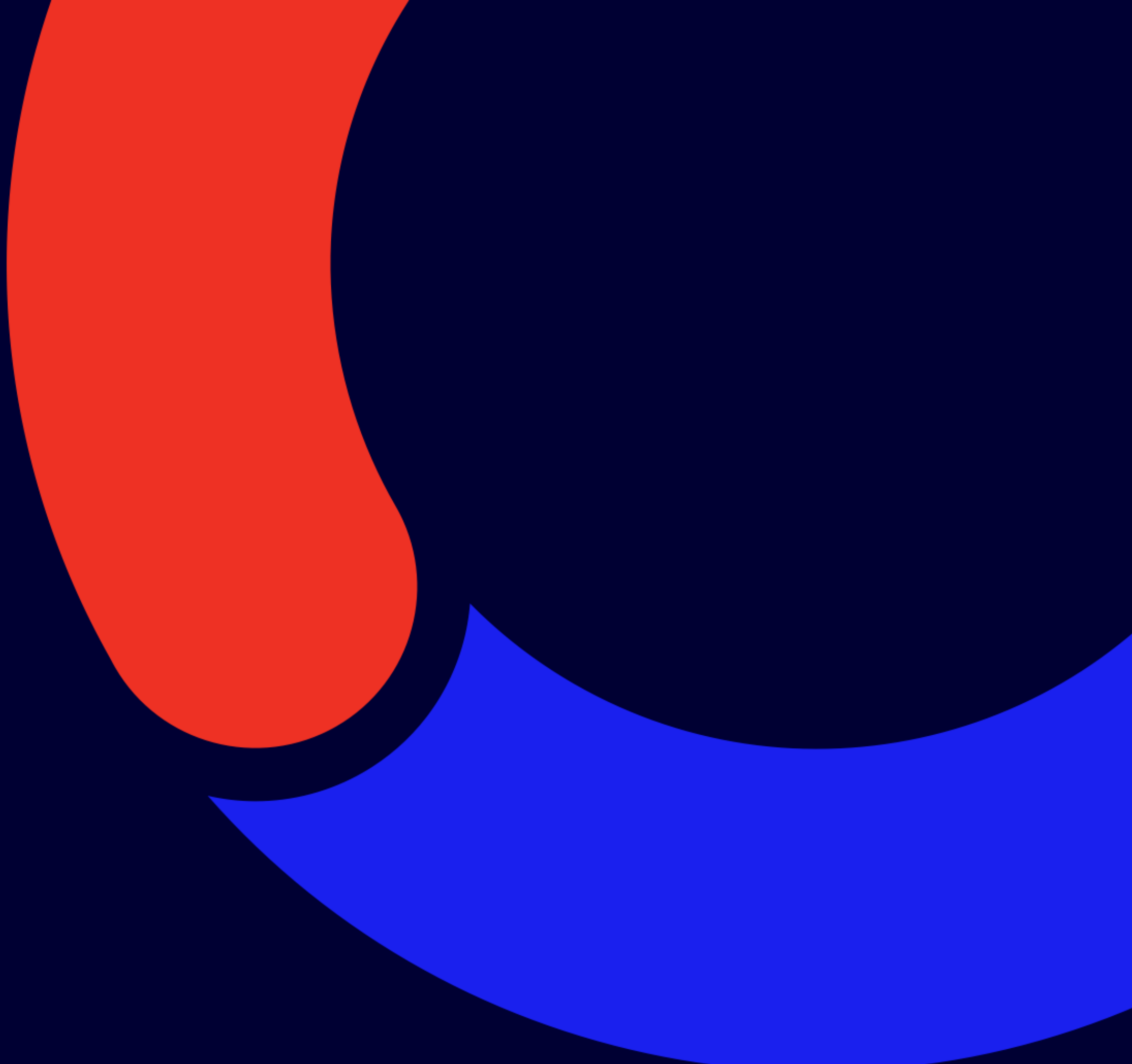




omd



State of AI Mid 2025

How mass adoption of AI technologies is impacting internet business models and media imperatives

Updated: July 11th 2025



WE *Create* WHAT'S NEXT

Consumer AI Shifting from ‘Trial’ to ‘Habit’

Behind the headlines of new AI models and agentic capabilities, the measures of AI adoption reveal real-world applications, allowing us to more effectively weigh and time plans for future innovation.

A June 2025 [Menlo Ventures survey](#) of 5,000 U.S. adults finds 61% have used an AI tool in the last six months, scaling to an estimated 1.8 billion global users, with 500-600 million daily active users.

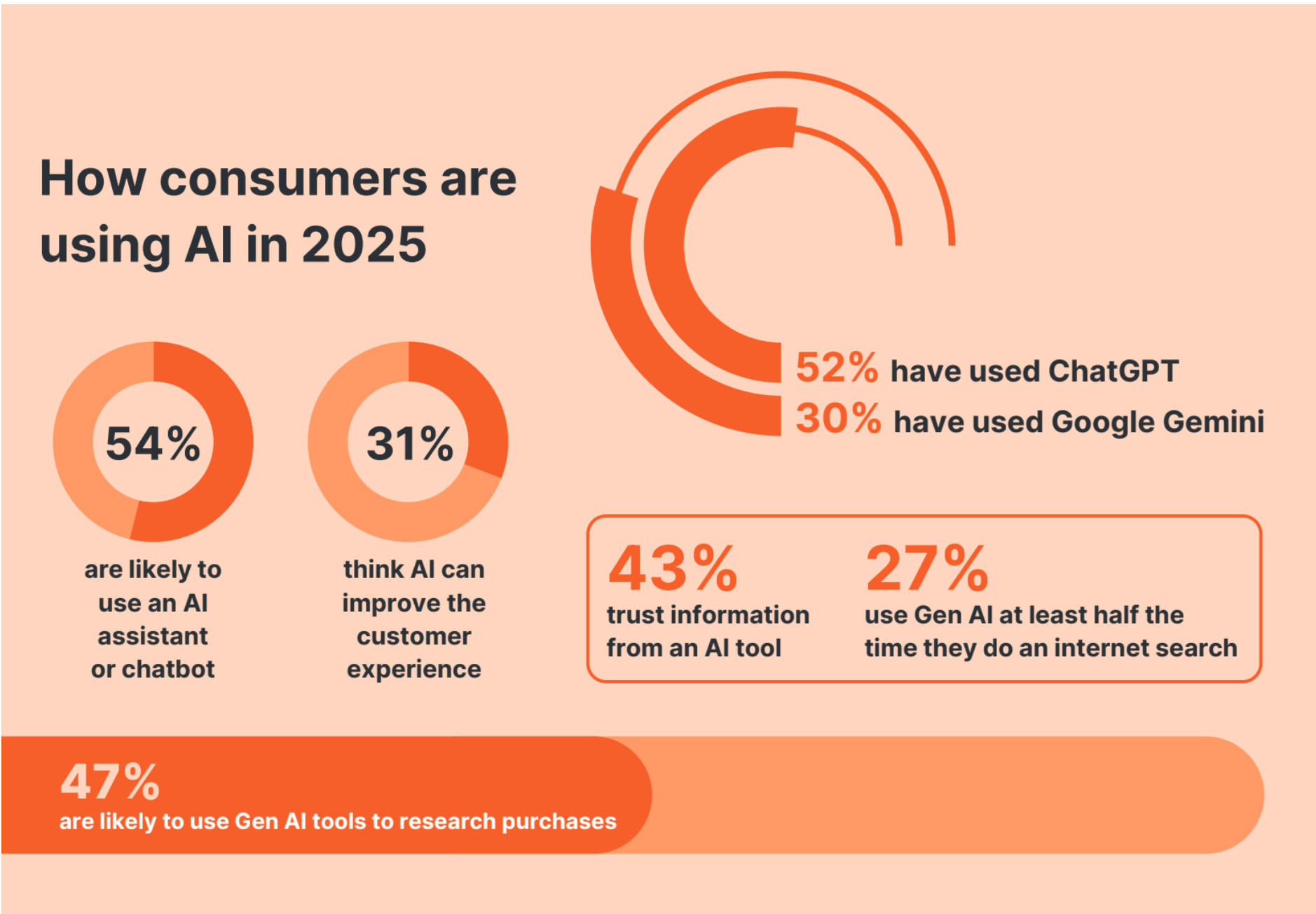
ChatGPT alone hit [800 million monthly active](#) users just 30 months after launch. Facebook needed six years to [reach the same milestone](#).

AI adoption is broad amongst all ages but is still strongest among the young. Gen Z unsurprisingly leads reach, yet Millennials emerge as power users, logging more daily sessions than any cohort, while [45% of Baby Boomers have tried AI](#) and 11% now use it daily.

As Sam Altman recently stated, older people use ChatGPT as a search engine, millennials as a life advisor, whilst younger cohorts use AIs like ChatGPT as their [life operating system](#).

Life-stage complexity is an accelerant: [79% of parents of under-18s](#) use AI, 29% do so every day, nearly double non-parents. Frequency is also rising quickly. Attest finds [53% of AI users engage “frequently”](#) with 18% “very frequently.”

Top [consumer tasks remain practical](#): writing e-mails (19% of U.S. adults), managing to-do lists (18%), meal planning (16%), and image creation (15%). 91% of users still [default to a single “generalist”](#) assistant first, despite hundreds of niche apps.

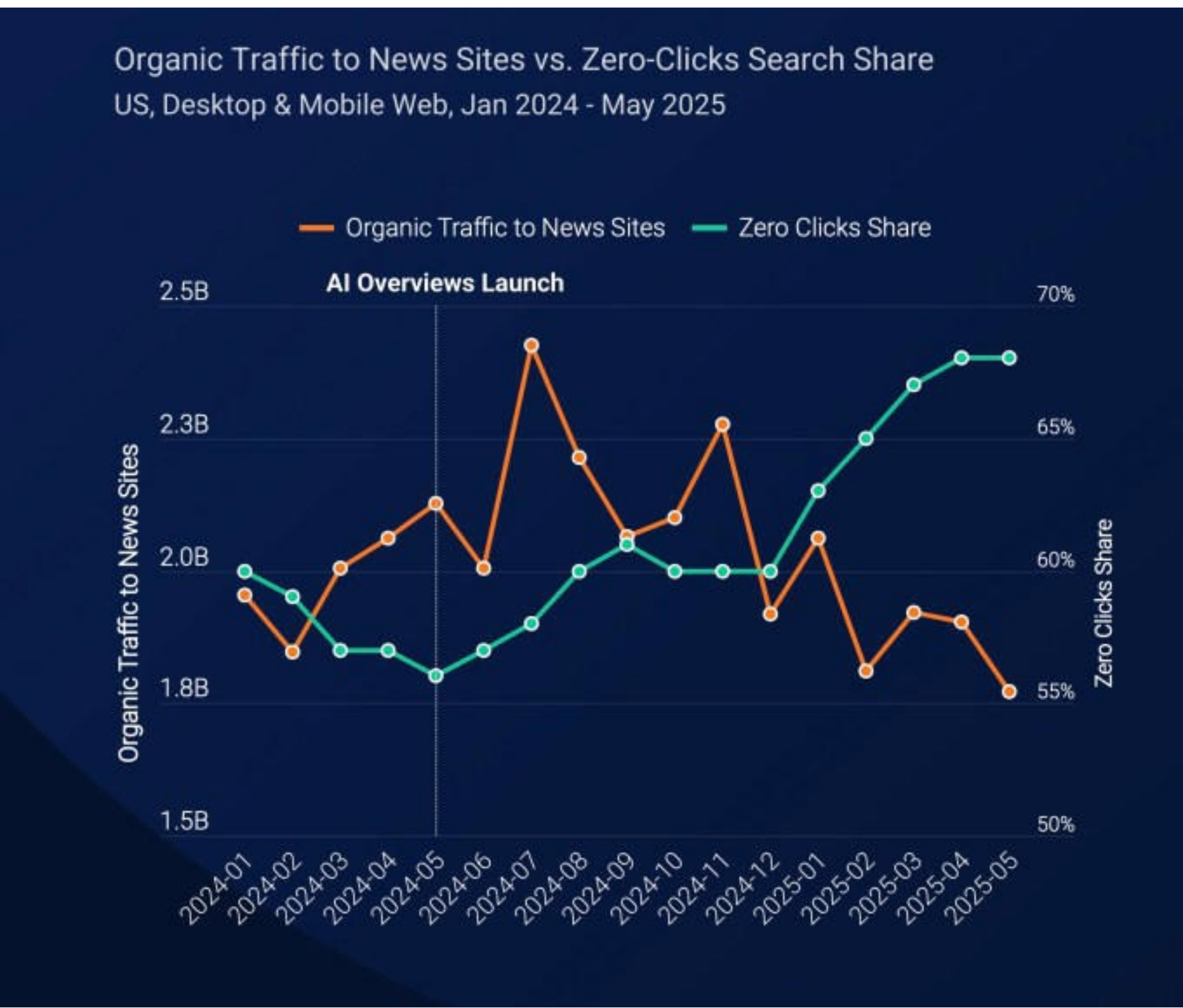


Attitudes to AI are shifting, [trust signals are turning positive](#): 43% of consumers now trust information from an AI assistant (+3 ppt YoY, but still a minority), and 33% trust brands to handle AI-derived data (+4 ppt). These changes have helped drive the number of consumers who are now likely to use Gen AI tools to research purchases to 47% of U.S. consumers.

Changing Search Traffic and Models

This change in mass consumer attitudes is beginning to manifest in [behavioral data](#). A recent analysis by SimilarWeb illustrates that YoY traffic that comes from [‘traditional search’ has been trending down](#) through H1 2025 across a variety of sectors.

A deeper dive into the [news sector diagnoses the issues](#) more clearly, with a significant rise in zero-click search share (including mechanisms such as Google AI overviews) to 68% of searches by May 2025. Whilst [organic traffic to news](#) sites has declined in the past year.



The impact on the business model of online news has led to an [antitrust suit](#) being filed in the EU by independent publishers. Google is seeking to find ways to monetize zero-click searches through programs such as [Offerwall](#), which allows users to support publishers through [micro-payments or watching ads](#).

37% of under-40s in the UK and 32% in the U.S. now [use gen-AI for at least half of all internet searches](#). 40% of current users say AI answers are more trustworthy than traditional links. Traffic from ChatGPT to news sites has [risen 25x](#) in the past year.

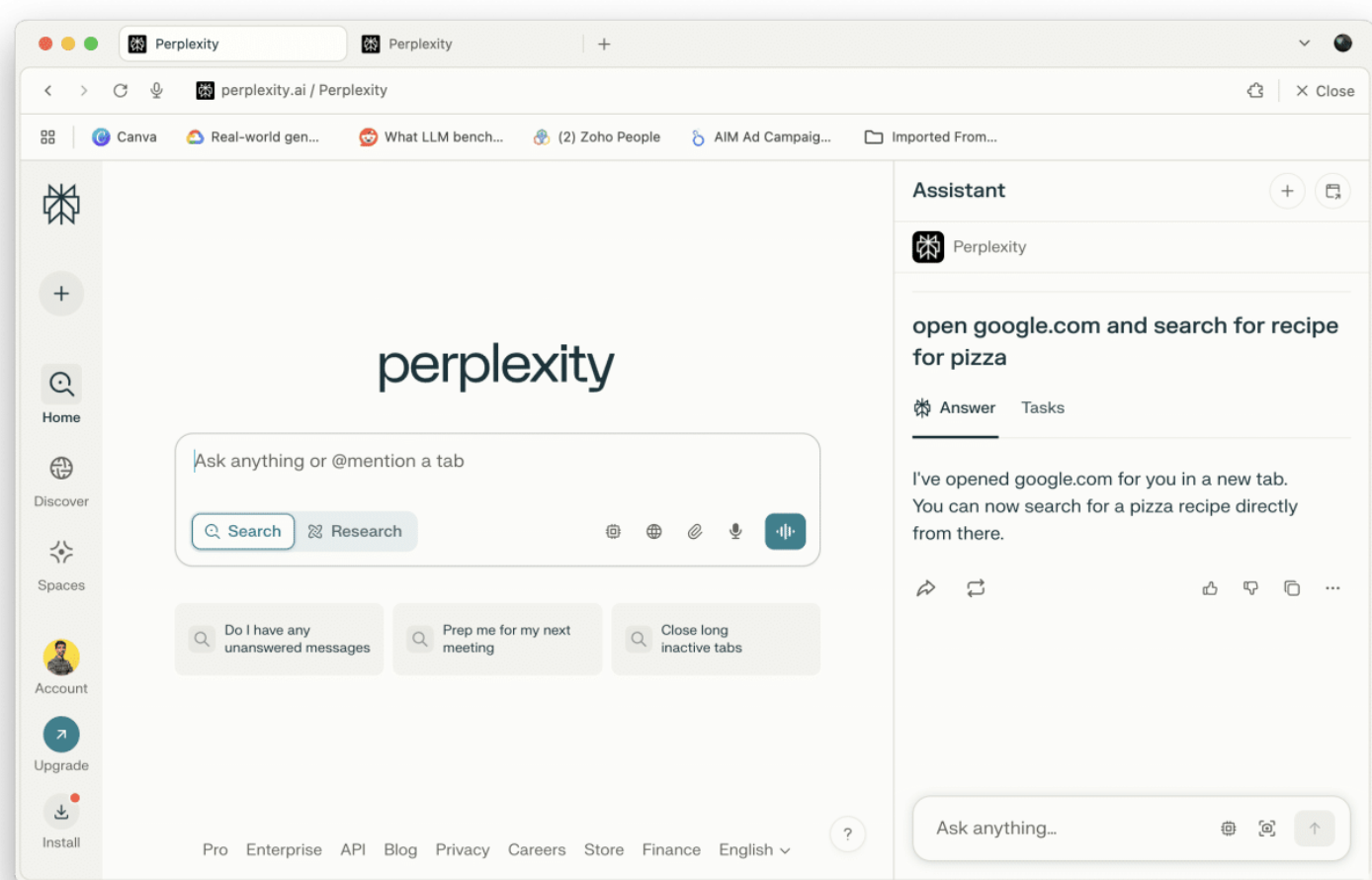
Adobe is forecasting a [3200% increase](#) in generative AI shopping traffic during this year’s Amazon Prime Day event. This is driven by more people using AI: 55% for research, 47% get product recommendations, 43% are finding deals, and 35% are getting gift ideas and finding unique products.

People are finding real value through the technology of those who have used AI for shopping [92% claim it enhanced their purchase experience](#), and 87% plan to use AI for larger or more complex purchases.

Agentic Experience

These new search and commerce behaviors are pointing towards agentic interactions, where content is created on the fly around specific user data and tools. The driver of success here is the ability of a brand to [share relevant information](#) in the right way, much like SEO.

In a sign of what we can expect to see next, [Perplexity launched Comet](#) this week, an agentic web browser on its USD 200/month Max plan. Comet enables a [wide range of integrated features](#) connecting browsing, mail, and shopping. Although there are [bugs](#) to fix.



[Agentic Experience \(AX\)](#) has developed from [User Experience \(UX\)](#) concepts. AX revolves around recognizing the [intent and purpose of different kinds of agents](#) and providing them with the information they need. Today, this is mainly generative search agents, but they will become far more varied, representing commerce, value, and service functions.

To date, most non-human traffic has been ignored or blocked as spam or hacking. Yet soon it could be amongst the most valuable interactions. New approaches that can differentiate between [agentic threat and agentic opportunity](#) in milliseconds are needed.

AX is yet another use case for [Model Context Protocol](#), whereby the different intents of agents can be served with different information. Mapping these changing (and ever more sophisticated) capabilities as an integrated brand ecosystem will deliver brand growth in the agentic landscape. Today, it is generative search agents within a matter of months, and more multi-modal agents such as those seen in Google's [Project Astra](#).

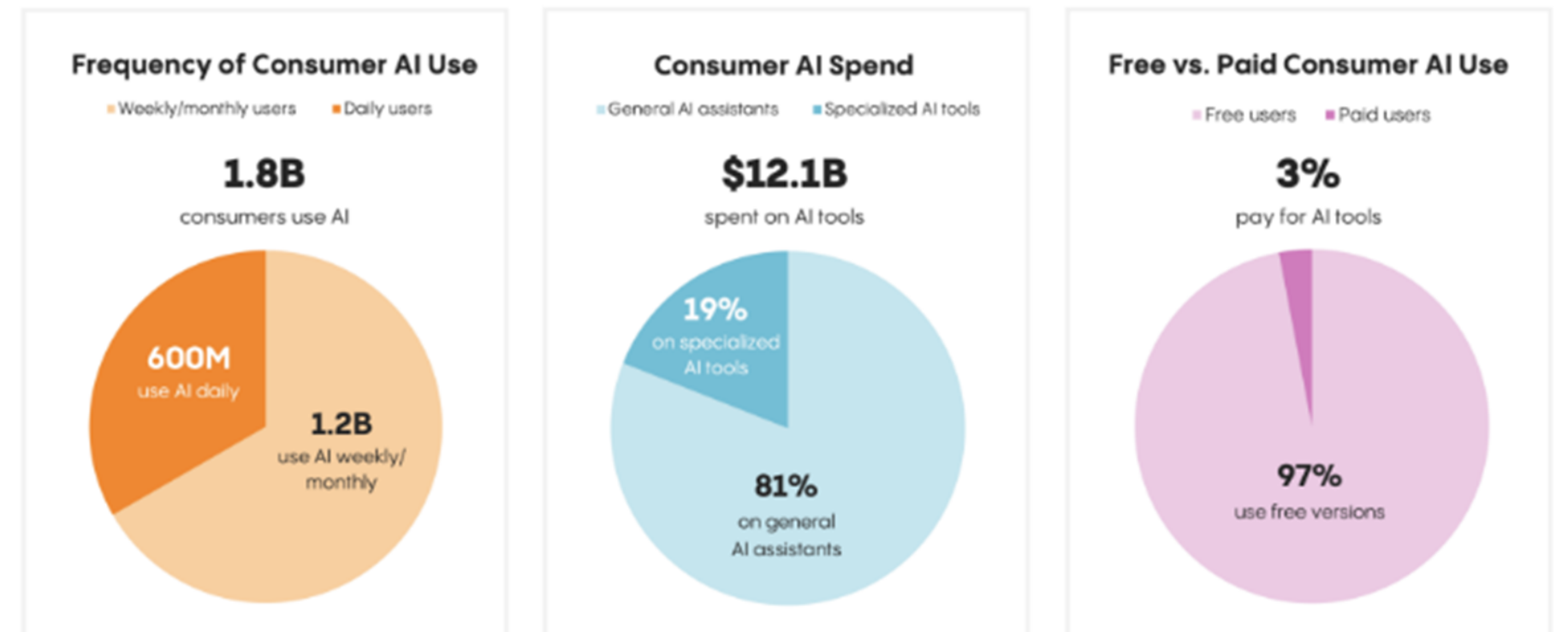
The second-order consequence is the resulting shifts in consumer behavior, such as, a renaissance in do-it-yourself activity (or do-it-with-AI).

Brand experiences must therefore be "AI-ready surfaces", i.e., structured, high-context data that large assistants can reference, as brand discovery becomes model-mediated. This includes site and social content, distributed data, markup for search, as well as ad copy.

Headroom for New Models

Despite near-universal reach, consumer spending on AI services remains unrealized. The global consumer-AI market is [just USD 12 billion](#), with only 3% of users paying for premium tiers; even ChatGPT converts only ~5% of its weekly active base.

A global look at usage, spending, and where the money goes



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The theoretical Total Addressable Market ([TAM](#)) [tops USD 430 billion if today's 1.8 billion](#) users generate USD 20/month ARPU.

The mass scale of AI utilization means that VC money cannot support unmonetized use for long. Coatue projects Big Tech AI-infrastructure [capex to hit USD 365 billion](#) (15':10'') in 2025, up 70% on 2024. The mismatch between large capex and small consumer spend signals headroom for ad-supported and freemium models.

Global advertisers can underwrite consumer AI utilities, e.g., search summaries, planning agents, and co-creation tools, in exchange for high-intent, context-rich commerce moments. First movers seeking to lock in behavioral signal advantage should aim to:

- Publish product facts, sustainability data, and brand narratives through schema markup and model-specific APIs and MCP to ensure authoritative answers.
- Use creativity as prompt engineering, ads doubling as structured prompts that teach models brand tone, values, and offers.
- Deploy lightweight agent plug-ins that sit inside dominant assistants, converting advice moments into one-click checkouts.
- Proactively label AI interactions, offer opt-outs, and highlight human-in-the-loop governance to convert curiosity into trust.
- Prioritize emotional storytelling that showcases people using AI in everyday contexts, to elevate human creativity and create new interactions or valued moments.

AI utilization is ahead of many predictions, so the urgency and potential for brand innovation rise.



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