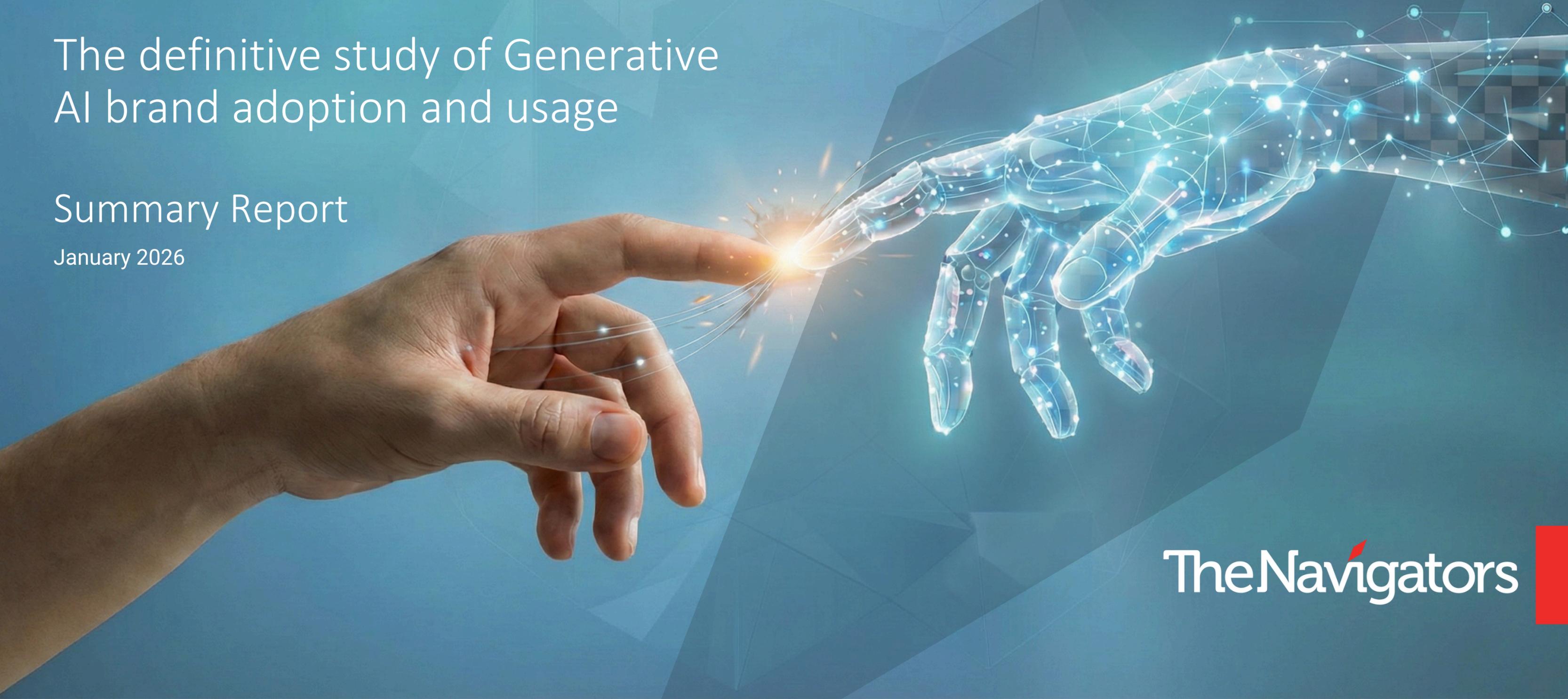


# AI Brandscape 2026:

The definitive study of Generative  
AI brand adoption and usage

Summary Report

January 2026



The Navigators

# Welcome to the AI Brandscape 2026

## Introduction

Generative AI has moved beyond novelty and early experimentation into everyday behaviour for many Australians. This shift matters because AI is no longer just a productivity aid in the background; it is becoming a decision aid that influences what consumers see, trust and choose, with the potential to disrupt paid media, retail environments and brand marketing.

## Why we conducted this study

Marketing leaders need clear, evidence-based answers to a fast-moving set of questions: *Who is adopting generative AI, how quickly is behaviour changing, what roles do different AI brands play, and where is AI already shaping discovery and commerce?*

The AI Brandscape study was designed to quantify adoption and usage at population scale, identify the emerging “AI-mediated” pathways to purchase, and highlight where trust, transparency and capability gaps create both opportunity and risk for brands.

## What the AI Brandscape study is

AI Brandscape 2026 is a robust Australian consumer study of generative AI tool adoption and behaviour. It examines:

- The **who**: demographic and behavioural segments adopting AI tools
- The **how**: frequency, skill level, momentum and usage patterns
- The **what**: AI brands used by use case, brand health and perceptions
- The **why**: attitudes, barriers, and reasons for and against adoption

## Why it's important for marketing leaders right now

This moment represents a strategic inflection point. As adoption becomes mainstream and usage intensifies, early positioning compounds: default AI tools can become default answers, and default answers shape default choices.

At the same time, the ecosystem is evolving quickly with multiple tools competing on trust, usefulness and task-specific relevance, creating new dynamics in visibility, attribution and brand safety. Consumer expectations are also rising: trust is conditional, and acceptance of AI-driven influence hinges on transparency, disclosure and integrity.

# Research Methodology

- Online Sample survey from a quality-assured market research panel
- Questionnaire designed following:
  - comprehensive **desk research**
  - **20 x qualitative in-depth interviews** with users of AI tools
- Data collected between **14<sup>th</sup> - 28<sup>th</sup> November 2025**
- Total sample of **1,736** Australians aged between 16 - 74 years



## General Population Sample

**n=1,436**

- Australians aged 16-74 years
- Sample Quotas by:
  - Age
  - Gender
  - State/Territory
  - Metro/regional/rural areas
- Sample weighted by Australian Bureau of Statistics population estimates



## AI User Booster Sample

**n=300**

- Based on self-identification of regularly using AI tools

# AI Brandscape 2026:

## Executive Summary



# Generative AI is now mainstream behaviour - AI-mediated discovery is shaping brand outcomes today

Regular generative AI usage has moved beyond early adopters, with a large share of Australians already engaging with AI tools regularly and many more trialling them. Many users engage frequently, and have already turned to them to help make better buying decisions, often as a complement or replacement to traditional online searching.

Regularly use AI tools

**43%**

of Australians

Use AI tools daily

**28%**

of Australians

Have used AI tools  
for buying decisions

**39%**

of Australians

Use to complement  
or replace search

**38%**

of Australians

## What counts as an AI tool in this study?

AI tools were defined as websites or apps that generate content (text, images, music, video) from user prompts.

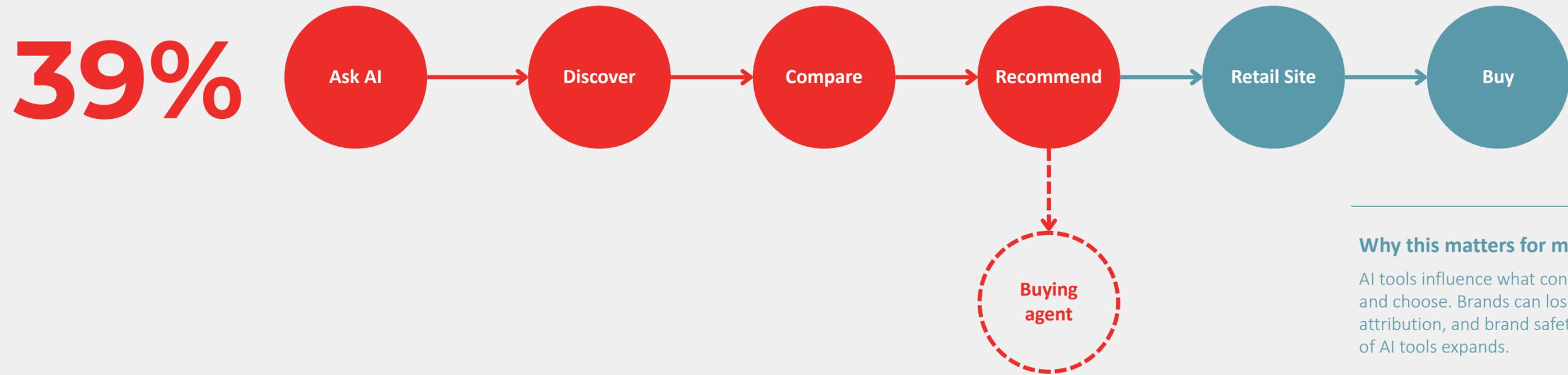
# AI is a new intermediary between consumers and brands. It is changing visibility, brand trust, and conversion mechanics

AI has changed how Australians discover information and make decisions. Many now use AI tools alongside or instead of search. AI is also increasingly used to make buying decisions, and a meaningful share act on AI recommendations or express openness to purchasing directly through AI tools.

## Traditional Buying Decision Journey



## AI-Mediated Buying Decision Journey

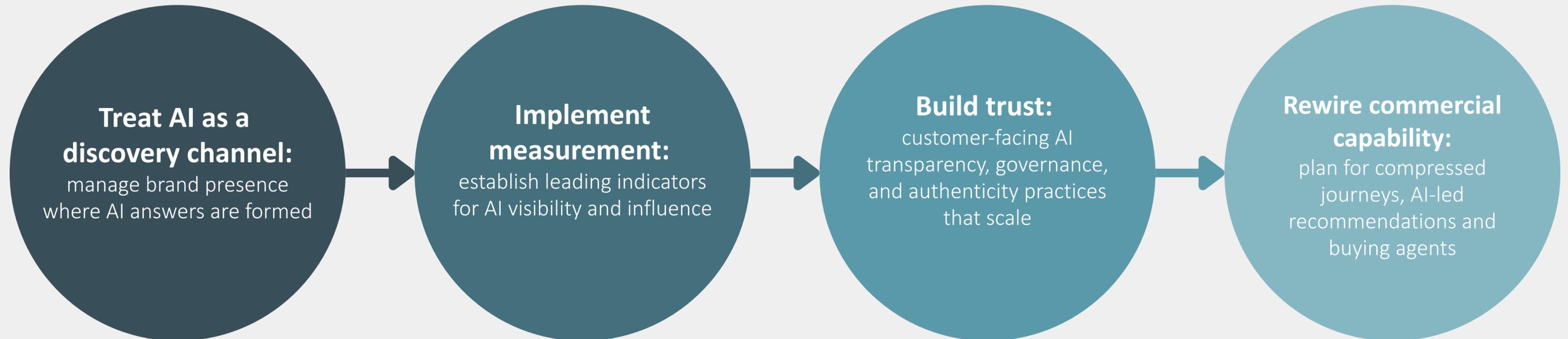


### Why this matters for marketing leaders

AI tools influence what consumers see, trust, and choose. Brands can lose control of framing, attribution, and brand safety as the proliferation of AI tools expands.

# Winning in an AI-mediated market requires a shift from experimentation to operating discipline

Leaders should move now on four priorities:

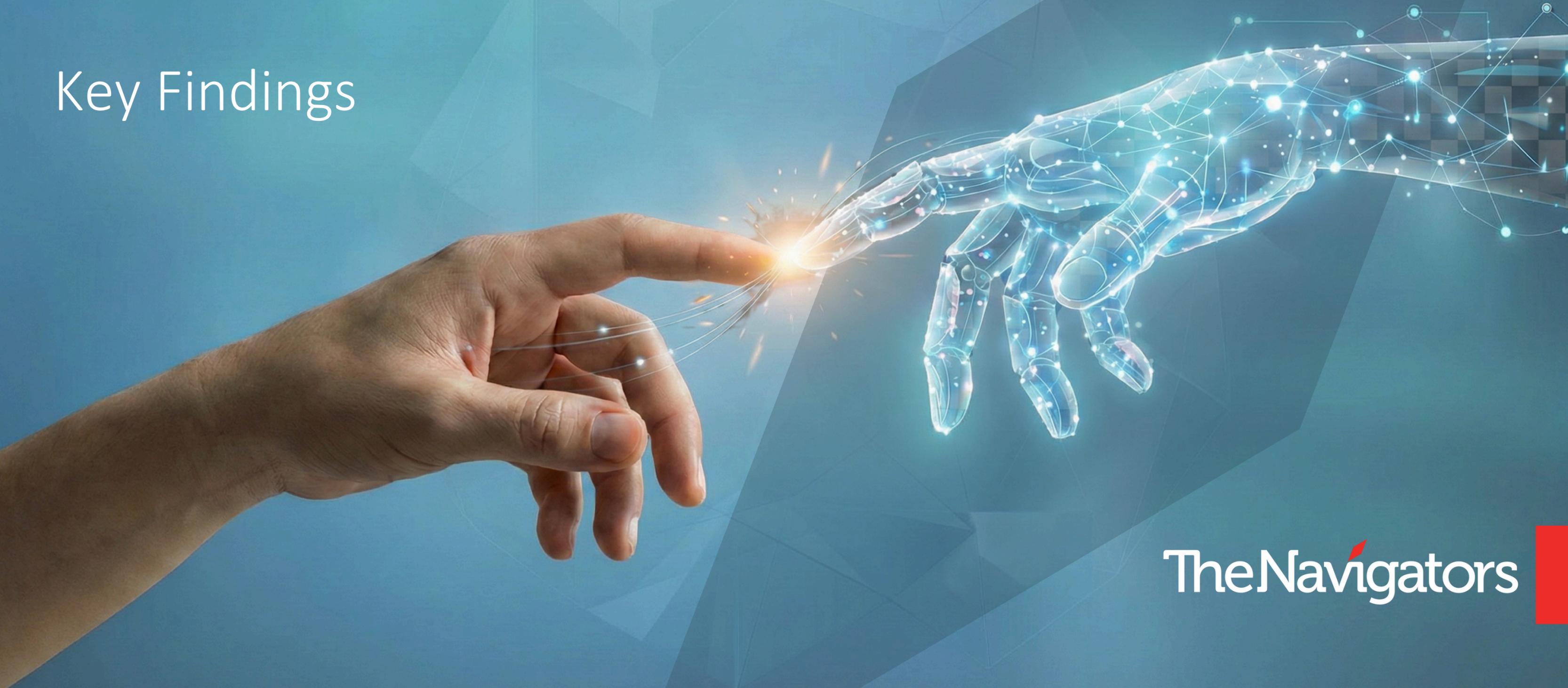


**This is not about replacing media with AI**

It's about adapting brand, search, and commerce strategy to AI intermediation.

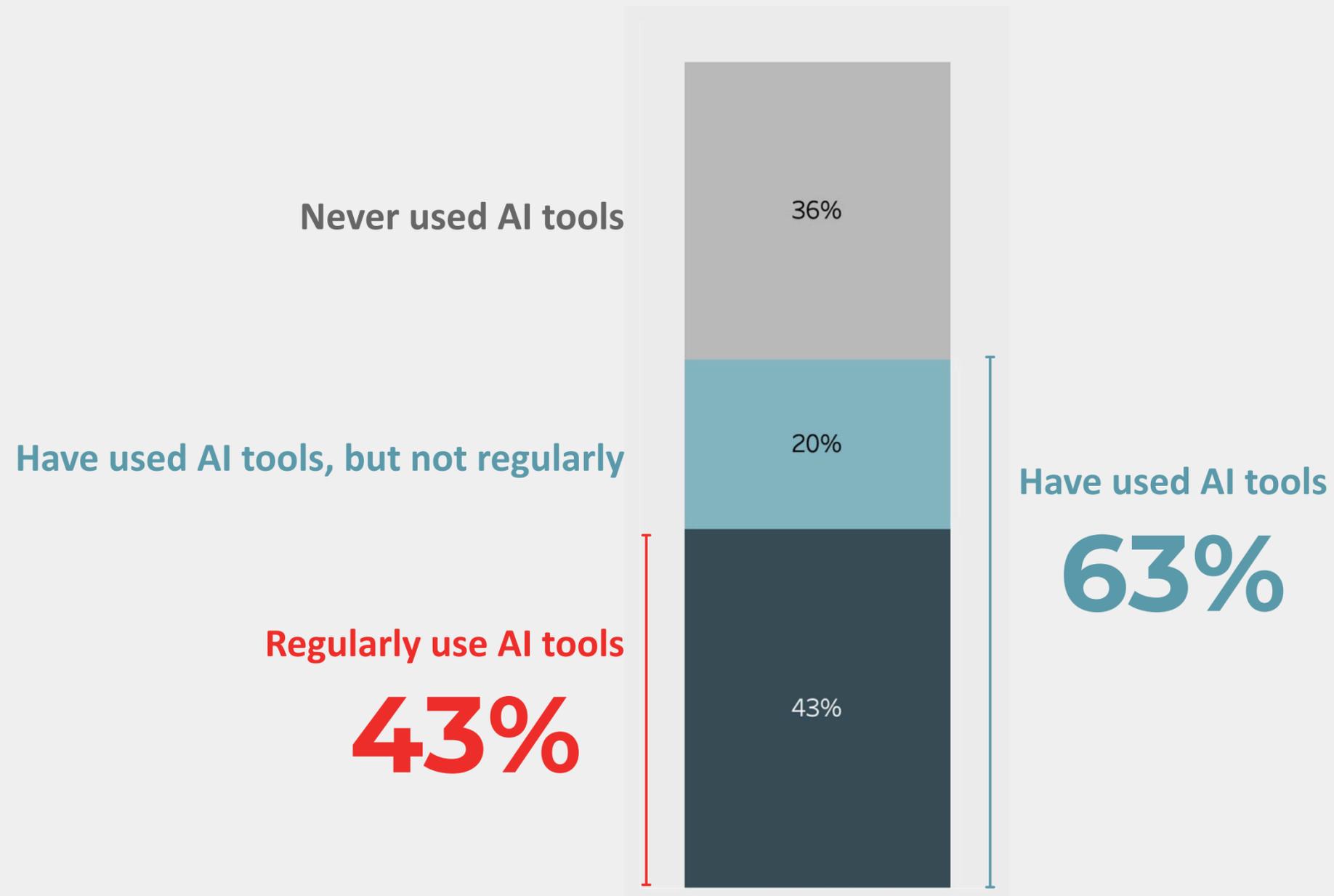
# AI Brandscape 2026:

## Key Findings



# Adoption: mainstream adoption of AI tools is at a tipping point

Adoption of Generative AI tools is not limited to a fringe of Australian society. It is now mainstream.



## Market definition checkpoint

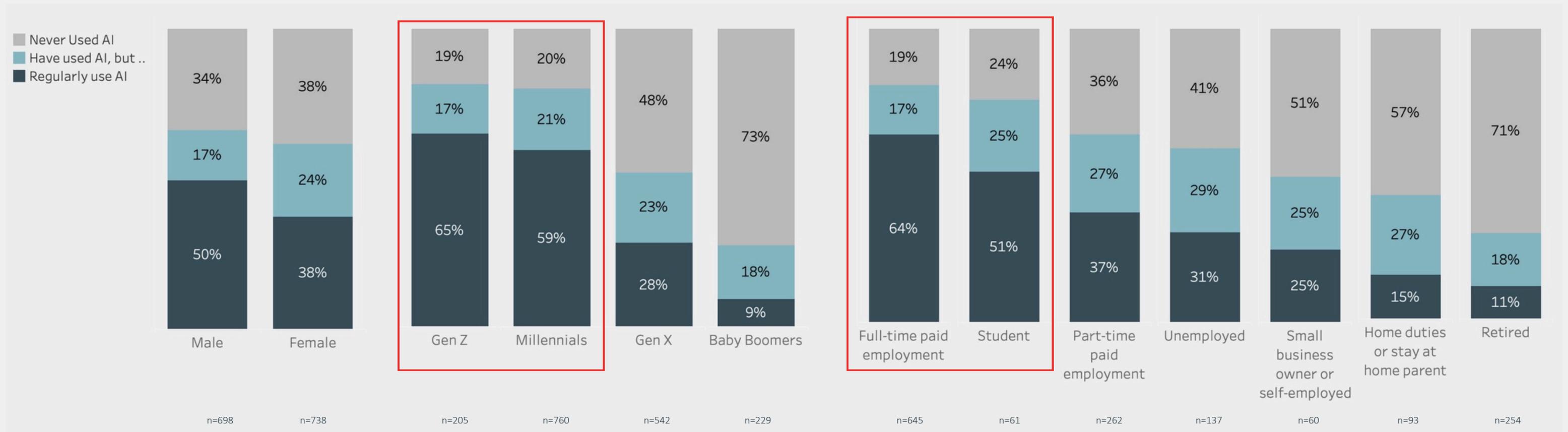
At this penetration level, AI tools become a mainstream environment that brands must actively manage.

*The following questions are about AI tools specifically. AI tools are websites or apps that create content, like text, images, music, or video from prompts you give them. Do you regularly use one or more AI tools?*

Sample: n=1,736 Australians aged 16 to 74 years  
Source: AI Brandscape 2026

# Who is using AI tools: adoption is not evenly distributed

Adoption is uneven—skewing toward younger, educated, employed Australians



**2x** Regular AI use among Gen Z & Millennials vs Gen X

Work and study strongly related to AI adoption

### Risk: the AI capability divide

As AI becomes embedded in services and decision-making, slower adoption cohorts risk being disadvantaged.

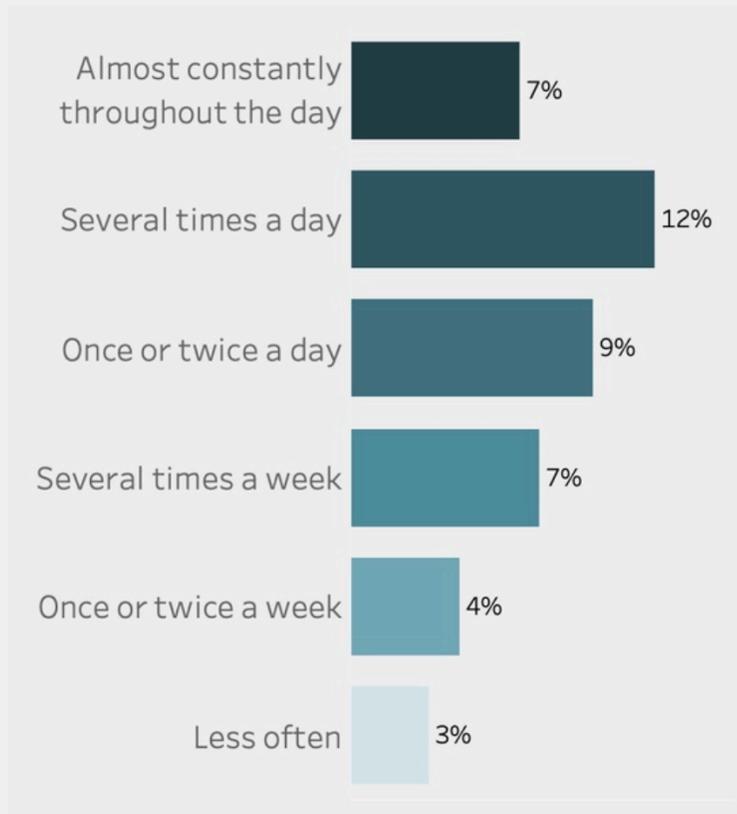
The following questions are about AI tools specifically. AI tools are websites or apps that create content, like text, images, music, or video from prompts you give them. Do you regularly use one or more AI tools?

Sample: All Australians - sample sizes shown above.  
Source: AI Brandscape 2026

# AI tool use intensity and momentum

Usage is frequent and still accelerating

How frequently do you use AI tools?



Daily Active Users

**28%**

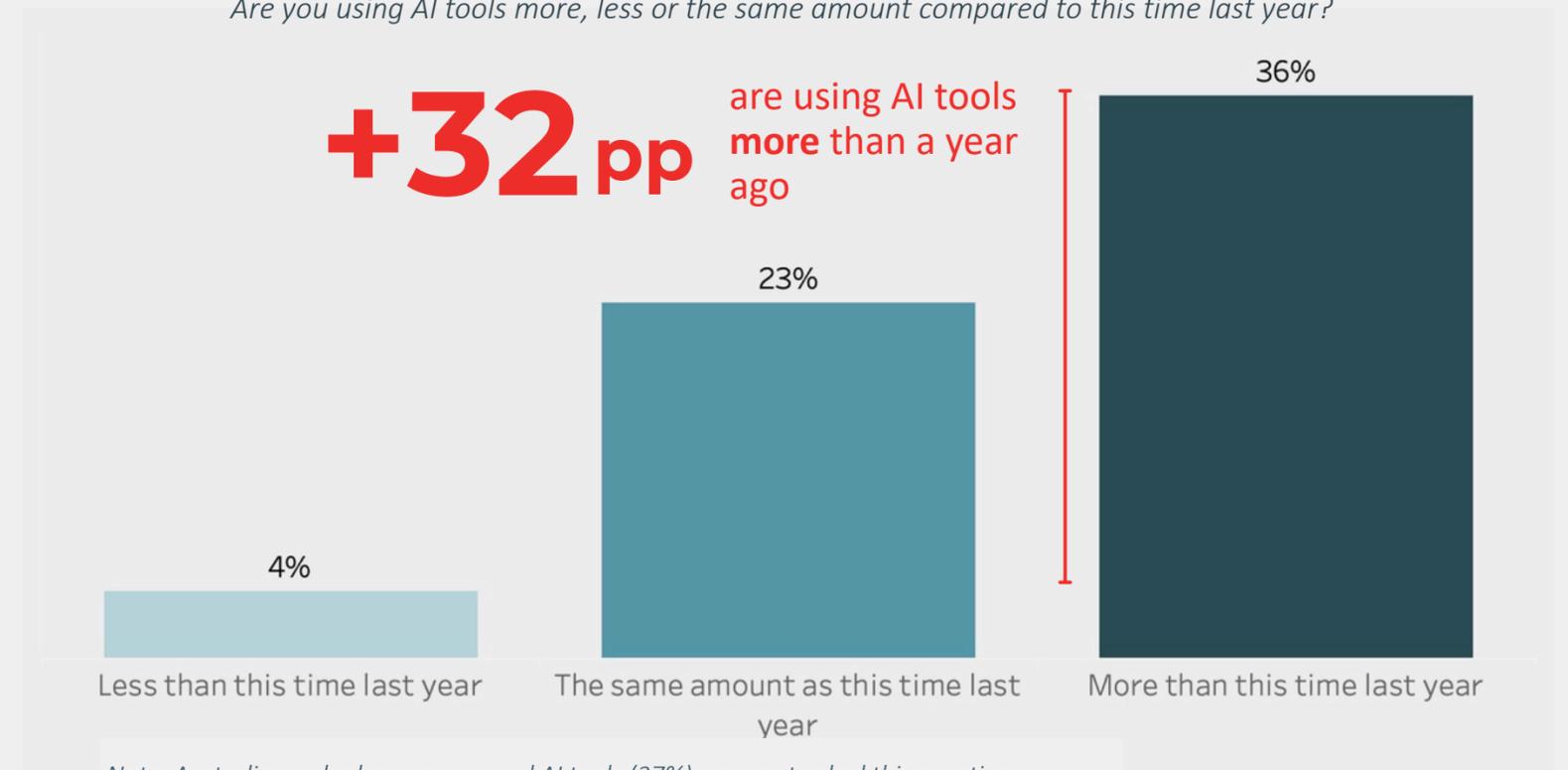
of Australians

Time spent using AI tools:

**4 hrs**

per week among regular users

Are you using AI tools more, less or the same amount compared to this time last year?



Note: Australians who have never used AI tools (37%) were not asked this question

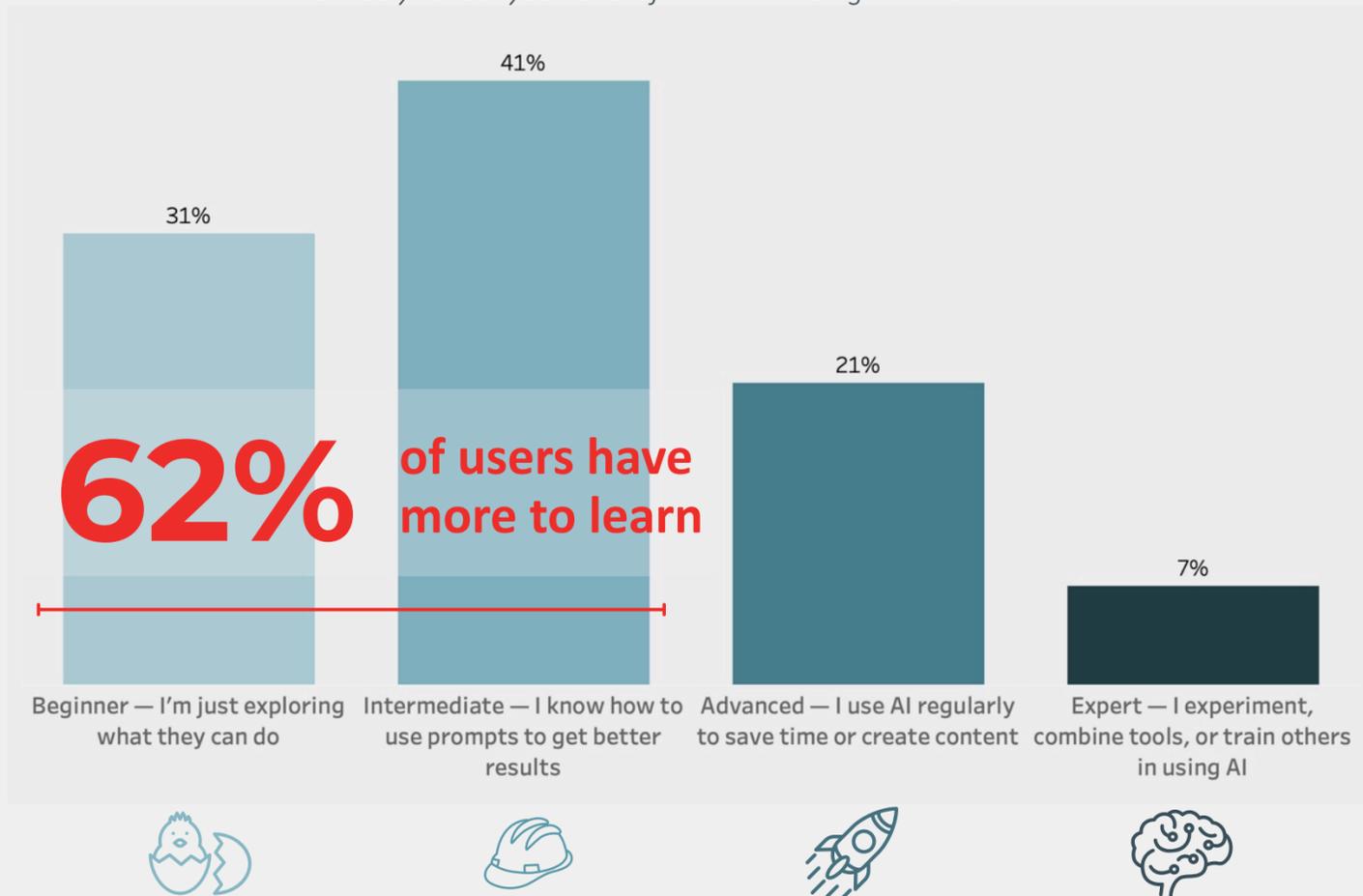
## What 'momentum' means for marketers

When behaviour is increasing year-on-year, early positioning compounds.

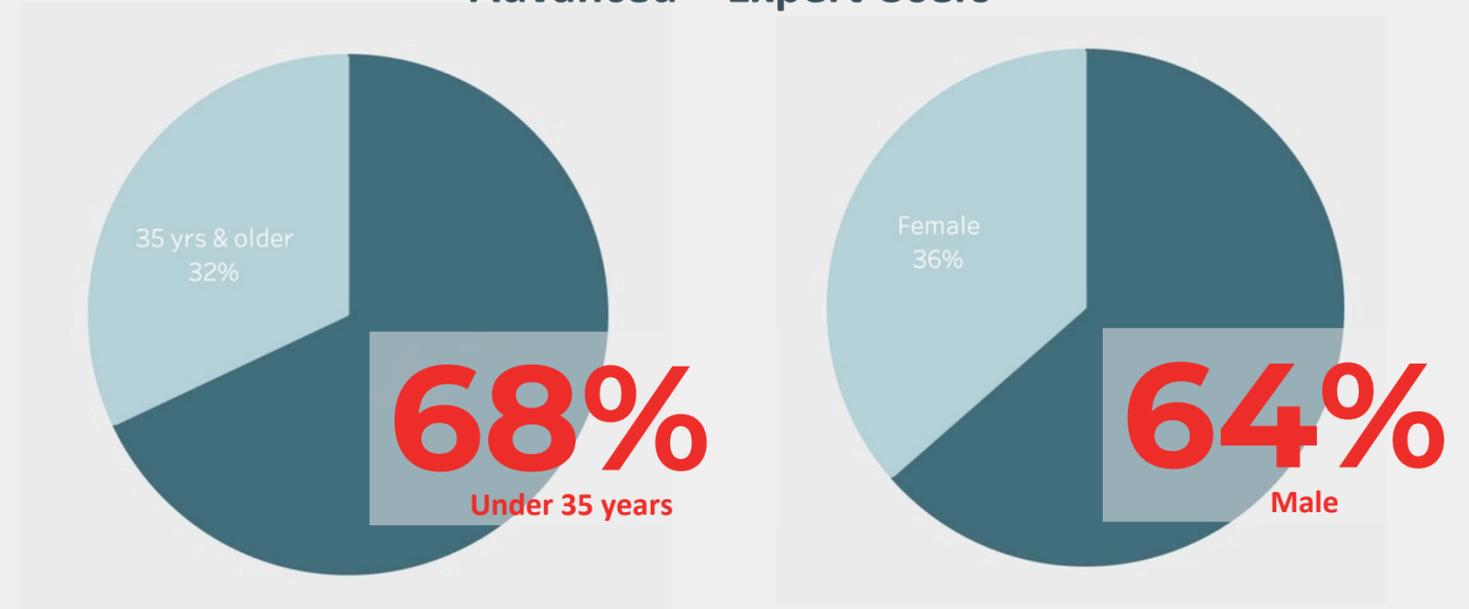
# AI adoption leads, mastery follows

Most users are still discovering uses for AI tools and feel they have more to learn about getting the most out of them. More confident users skew under 35 and male.

How do you rate your level of skill when using AI tools?



 +   
Advanced + Expert Users



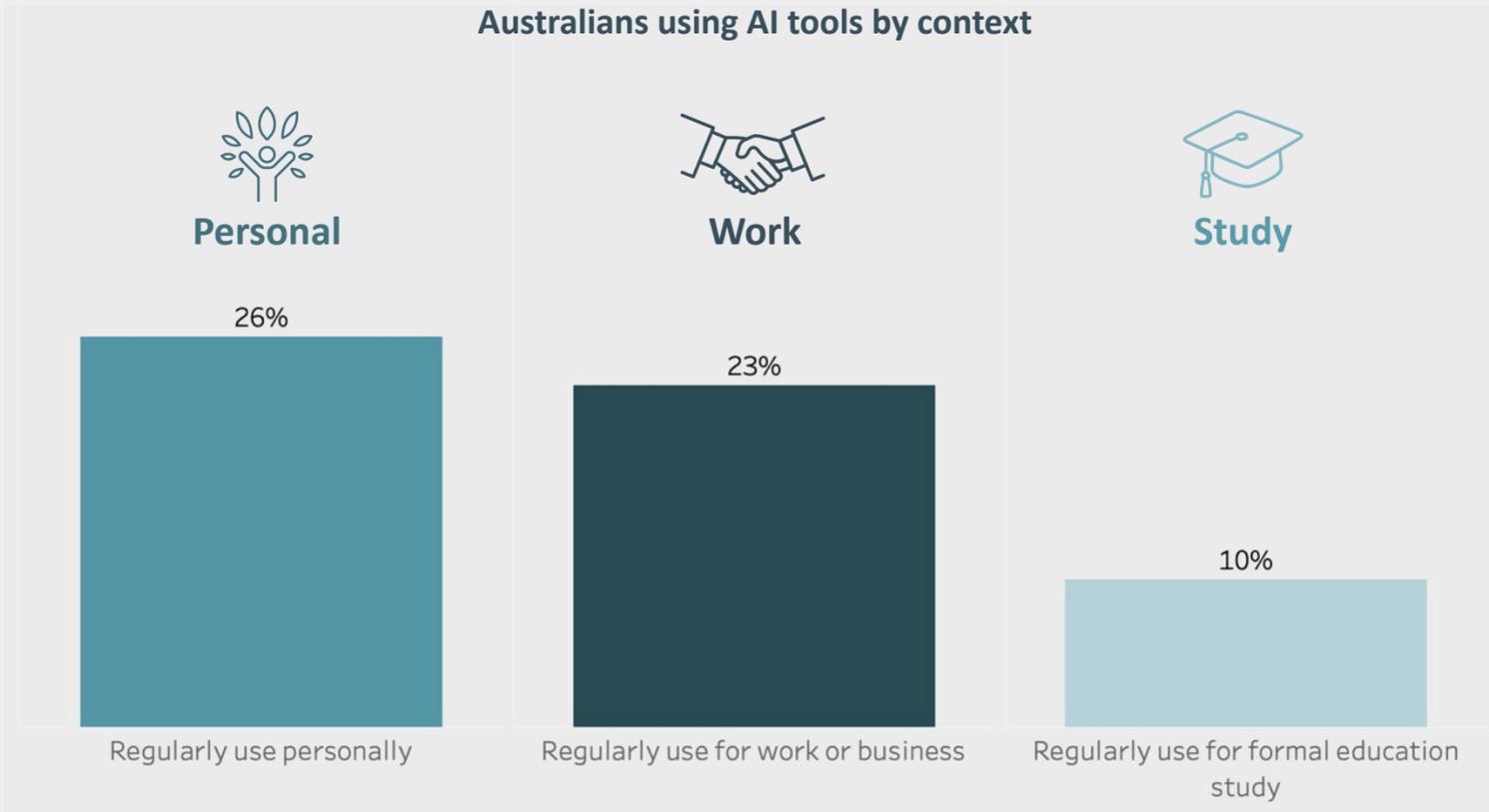
### Opportunity: simplify value creation

Brands and AI platforms that reduce friction and guide users to outcomes can disproportionately benefit.

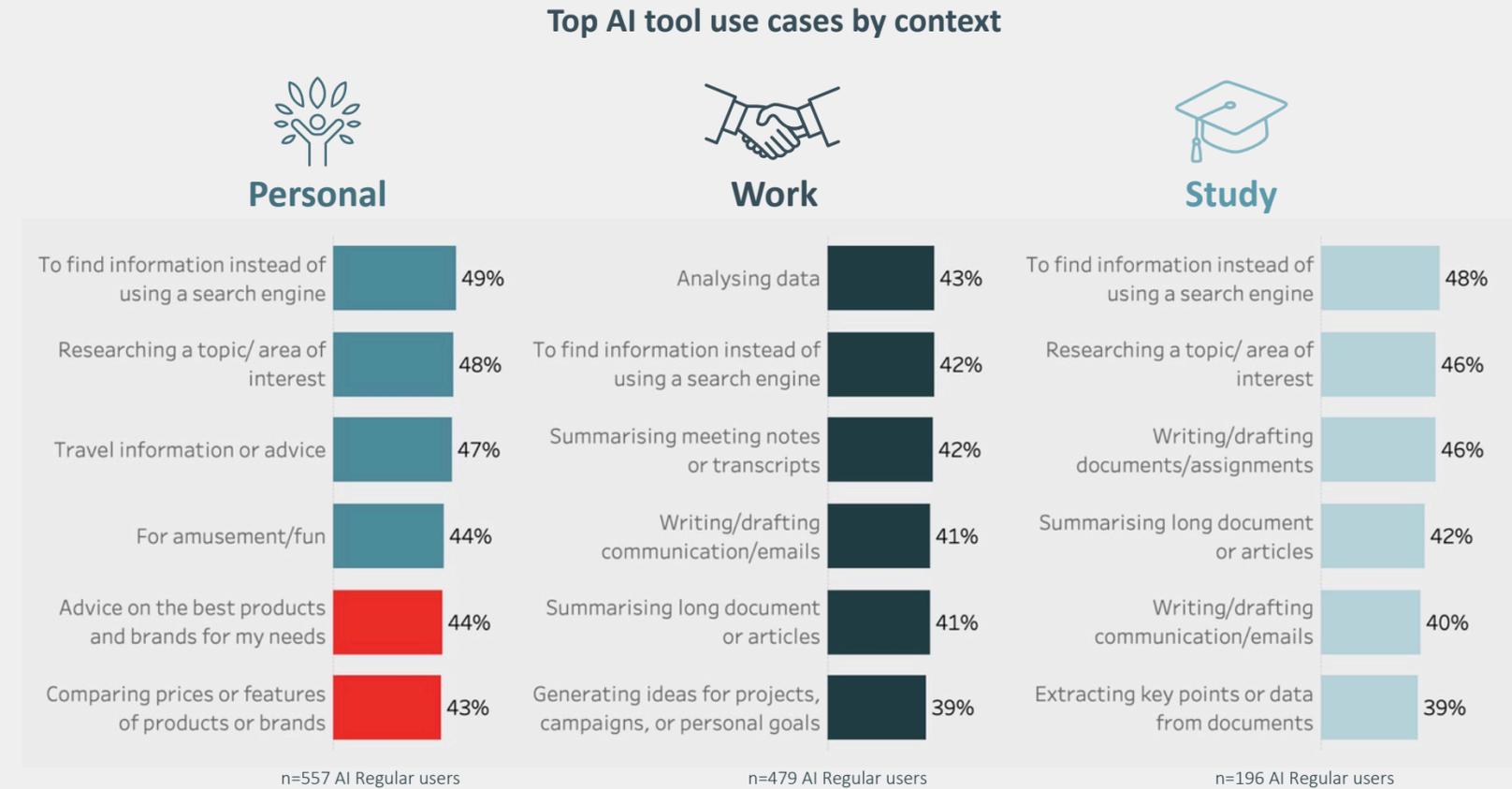
# AI is embedded across personal life, work, and study

AI tool use spans research, writing, problem-solving and shopping across work, study and personal contexts

Australians using AI tools by context



Top AI tool use cases by context



## AI tools are a general-purpose assistant

AI is now a multipurpose layer across daily life contexts, not a niche tool category.

For these uses of AI tools, which of the following options best describes the situation in which you use them?

Sample: n=884 AI Regular users

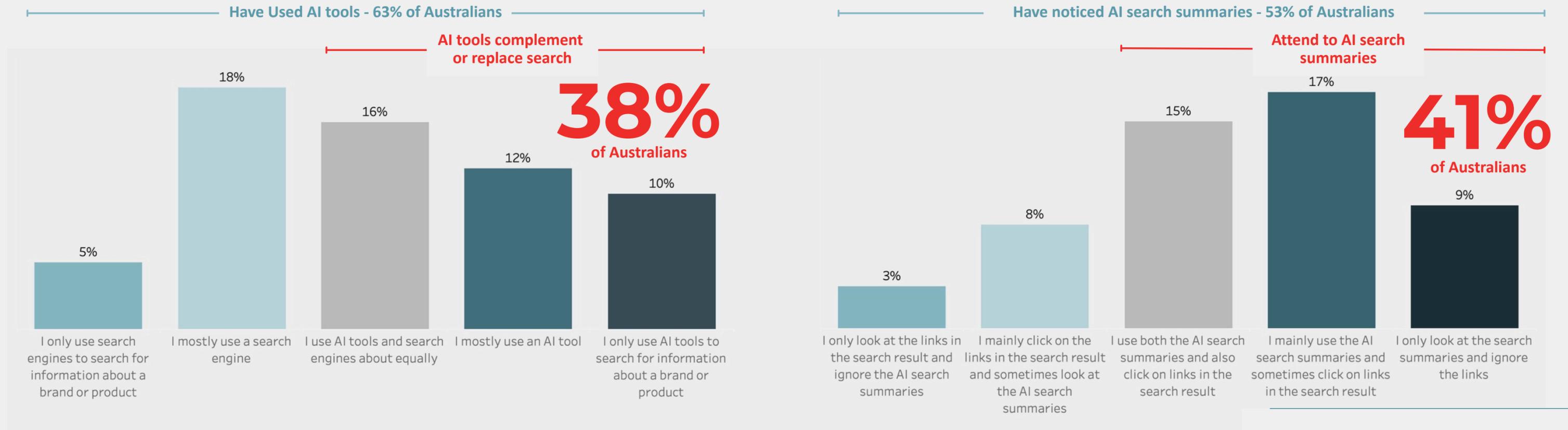
Source: AI Brandscape 2026

# AI is a new intermediary between consumers and brands. It is changing visibility, brand trust, and conversion mechanics

AI has changed how Australians discover information and make decisions. Many now use AI tools alongside or instead of search.

When looking for information about a brand or product, which best describes how you use AI tools compared to a regular search engine like Google or Bing?

When using search engines like Google or Bing, have you seen AI-made summaries of information related to your search appearing?



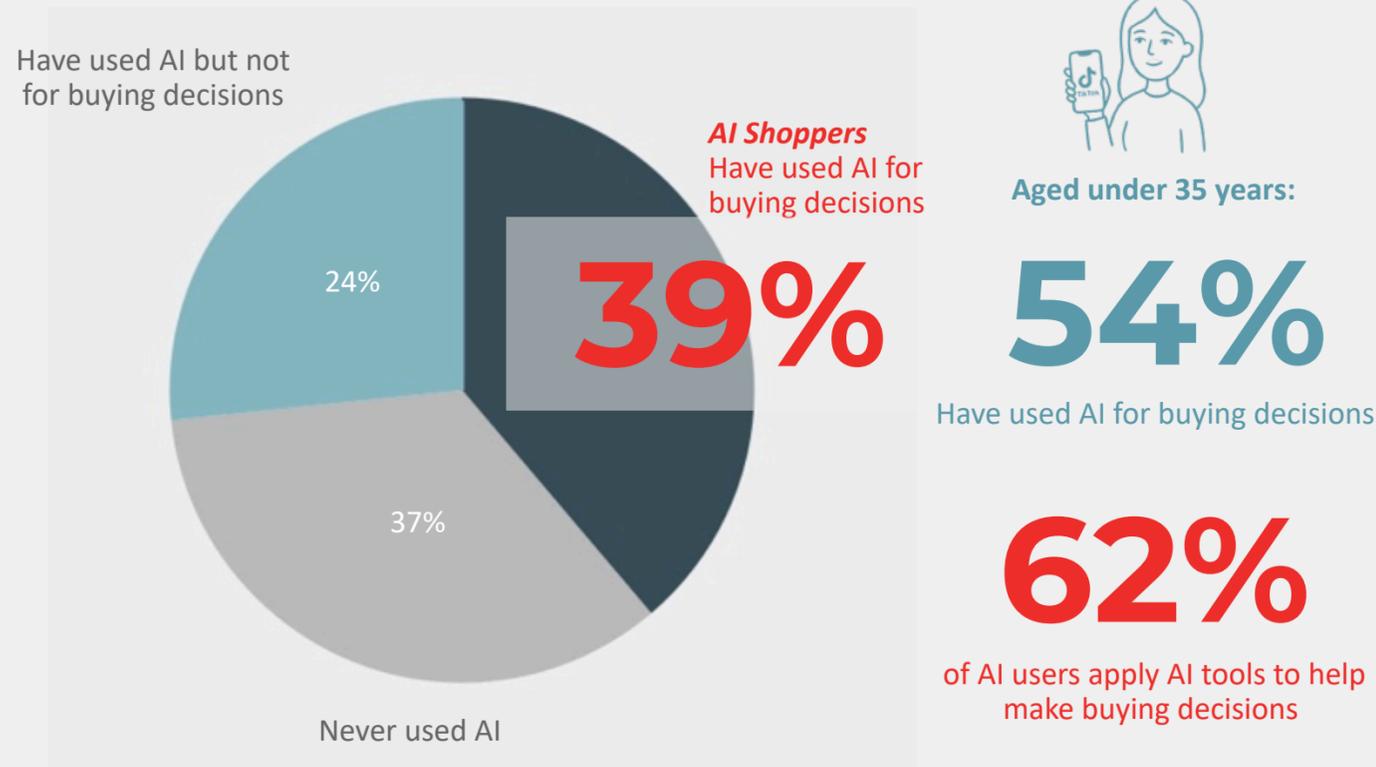
## Why this matters for marketing leaders

AI is not just a productivity tool. It's a decision layer that influences what consumers see, trust, and choose.

# AI is already influencing purchase decisions, especially among under-35s

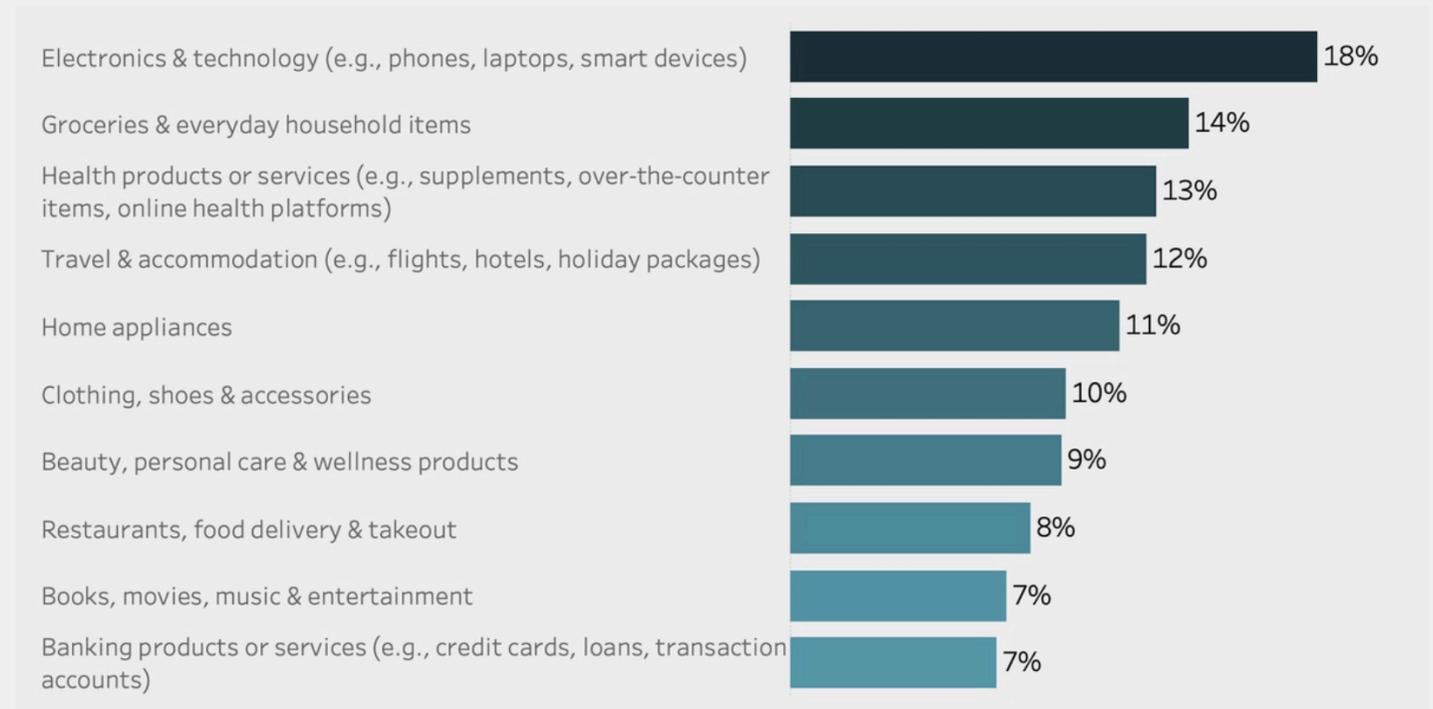
AI users are regularly applying AI tools to help them make better buying decisions in complex categories and also simple categories like groceries and everyday household items.

Have you ever used an AI tool to help you make a decision about a brand, product or service?



In which, if any of the following categories have you used an AI tool to help you make a purchasing decision?

## Top 10 Categories where AI Tools have been used to make buying decisions



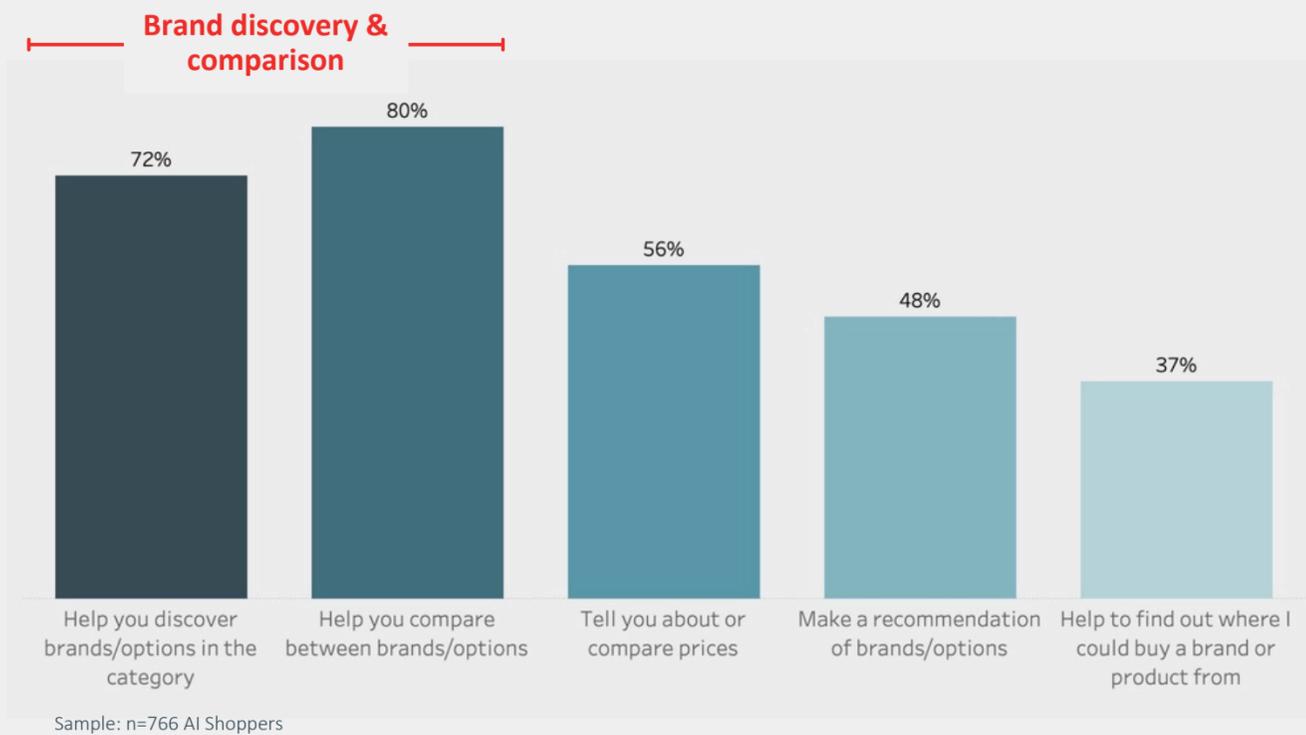
### AI is a new gatekeeper to consideration

Marketers must influence how their brand is discovered and compared within AI tools, not just in search, media and retail environments.

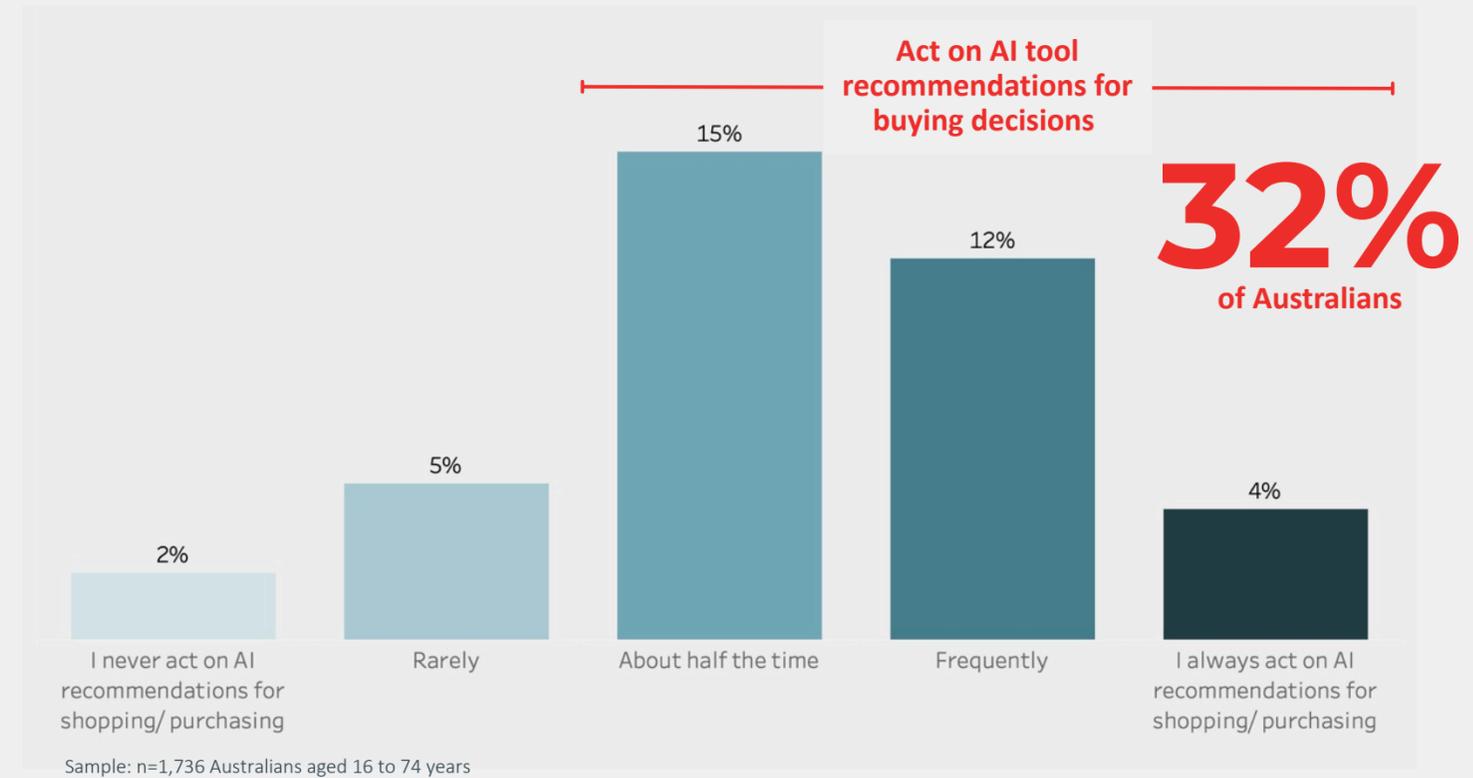
# The customer journey is compressing

AI is moving from discovery to recommendation to action and nearly one in three Australians are prepared to act on AI tool recommendations, reflecting a high level of trust.

For the categories you have used AI to help make a purchasing decision, which of the following have you done?



Thinking about the times you use an AI tool to help you make purchasing decisions, how often do you act on the information or recommendation made by an AI tool?



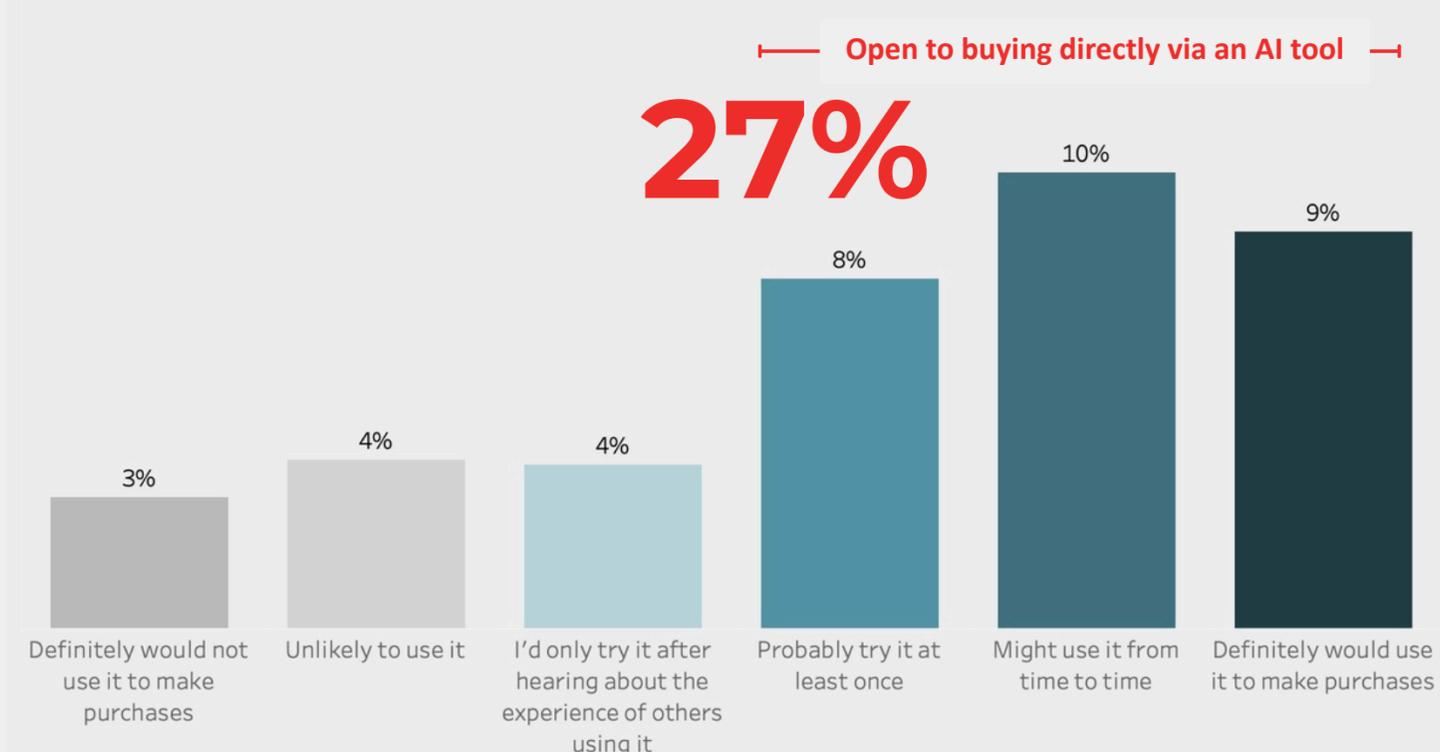
## Implication for media and agencies

Planning must anticipate fewer steps between influence and transaction and new attribution challenges.

# AI users are ready to transact via AI tools

The potential to make online purchases directly is welcomed with more than a quarter of all Australians (63% of regular AI users) ready to try AI buying agents via their main tool.

If <Main AI tool> had a feature where it could make online purchases directly for you, instead of you needing to go to a retailer's app, website or store to make a purchase, how likely would you be to do that?



Sample: n=1,736 Australians aged 16 to 74 years - 1% answered Don't know (not shown)

You mentioned you are open to making online purchases directly using . In which, if any of the following categories would you be open to using <MAIN BRAND> to make purchases directly for you?



Sample: n=1,736 Australians aged 16 to 74 years

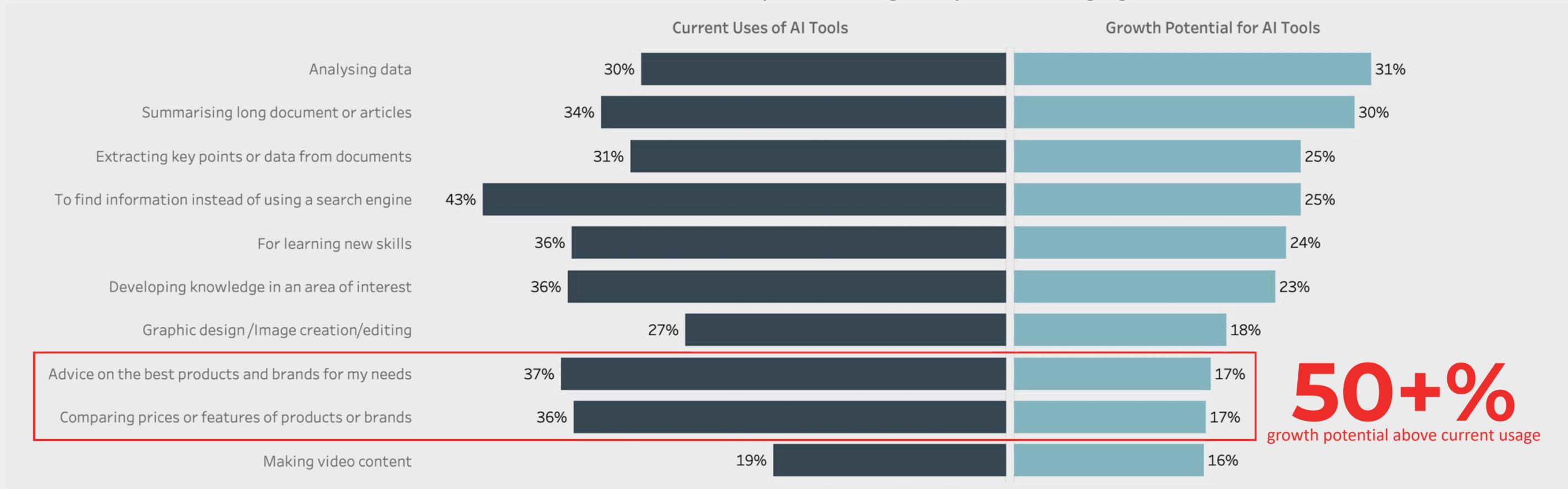
## Transaction behaviours are about to shift

With one quarter of all Australians willing to transact online via their main AI tool, few categories will be immune from a rapid shift once buying agent capabilities roll-out.

# Shopping and purchasing are among the highest headroom use cases

AI users identified uses they were yet to try, but are open to using AI tools for. Aiding buying decisions are among the top uses with potential for growth of 50+% above current usage.

Top 10 uses with growth potential among regular AI users



**50+%**  
growth potential above current usage

## Navigating categories with AI is poised for growth

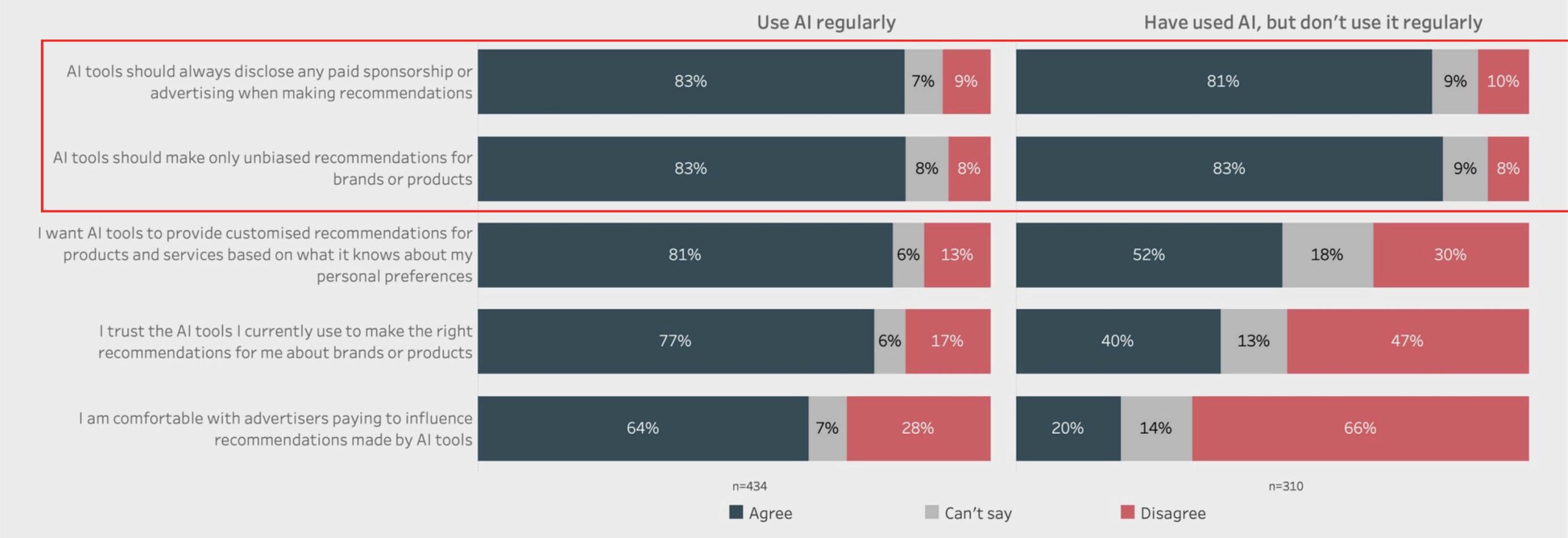
As AI tool use becomes more ingrained and users increase in confidence and skill, more purchasing behaviours will be influenced.

Below is a list of possible uses that you did not choose as things you do regularly with AI tools. Which, if any, of the following would you be open to doing with an AI tool in the future at work, for study or personally?

Sample: AI Regular users n=884  
Source: AI Brandscape 2026

# Consumers will tolerate AI advertising if it is transparent and disclosed

Regular AI tool users are more open to advertising than occasional users, but that support is conditional on clear disclosure and the assumption that advice is not tainted.



**80+%**  
want AI tool integrity

**Disclosure & integrity are non-negotiable**

Acceptance hinges on transparency and the understanding advertising will not influence the independence of AI tool advice.

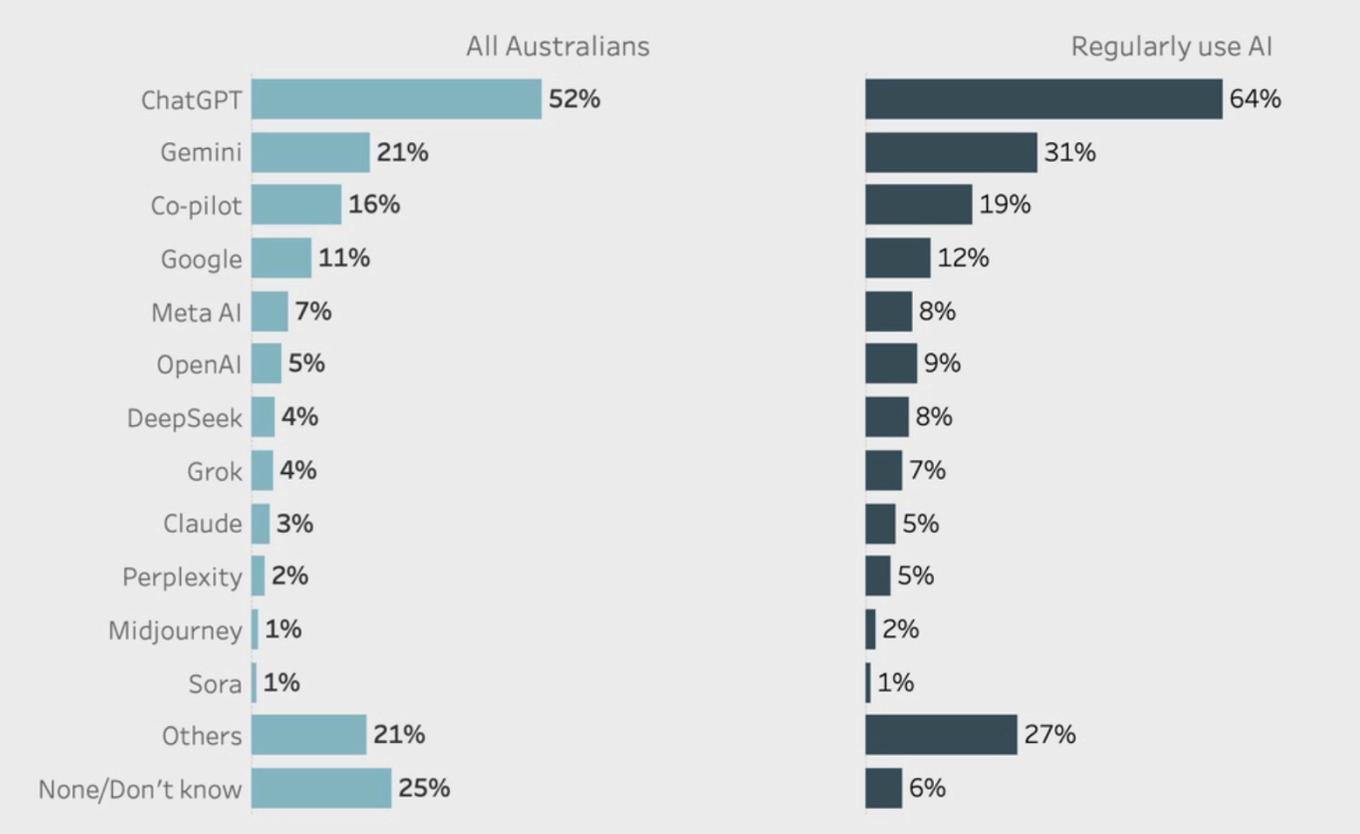
Please indicate whether you agree or disagree with the following statements about AI tools and advertising.

Sample: AI users - sample sizes shown above  
Source: AI Brandscape 2026

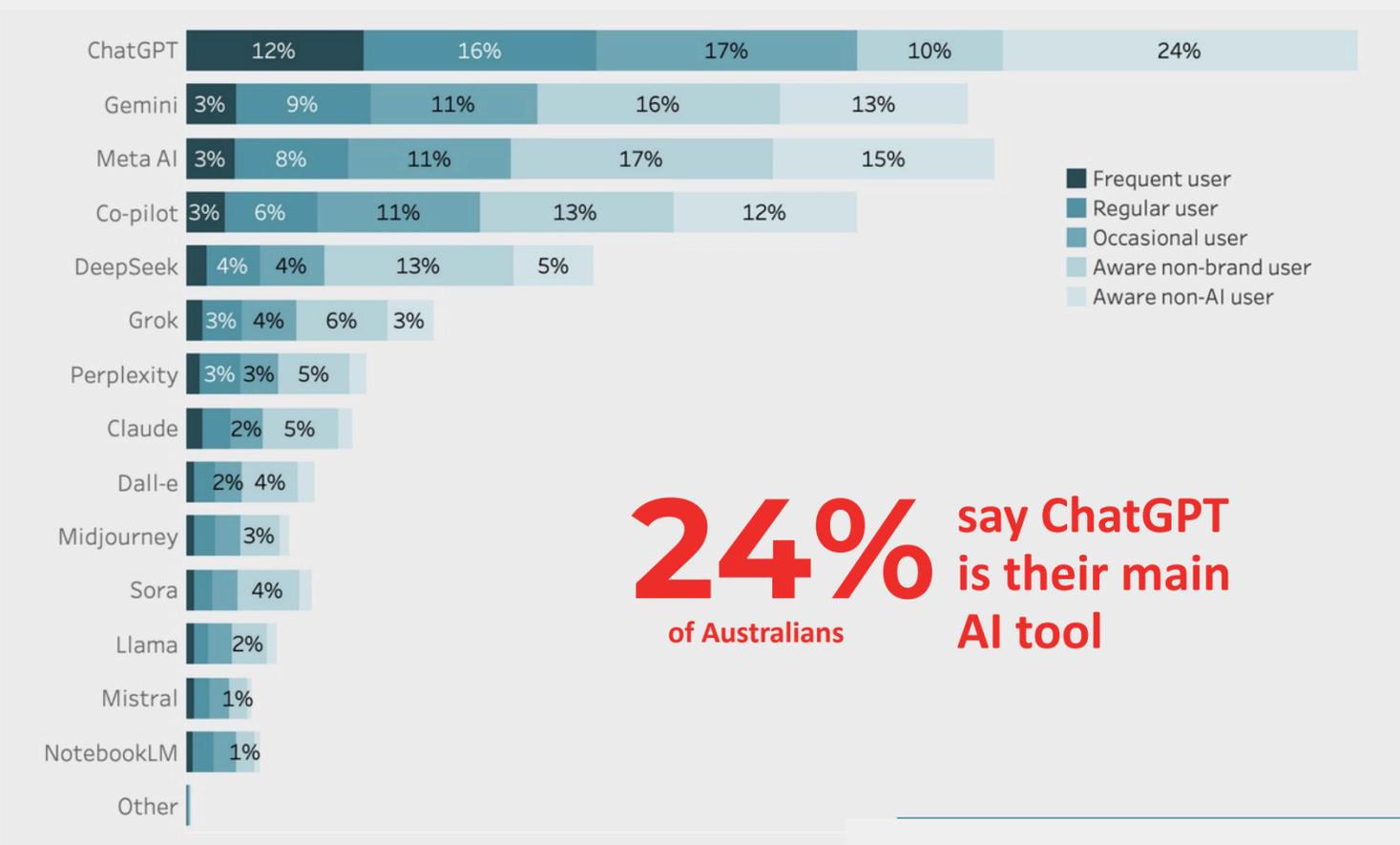
# ChatGPT dominates but competitors have meaningful footholds

The AI tool ecosystem is rapidly evolving. While ChatGPT had a head start in the category, Gemini and Meta AI also enjoy meaningful levels of use.

Thinking about AI tools, which brands or names come to mind?



Which of the following best describes your relationship with these tools?



**24%** of Australians say ChatGPT is their main AI tool

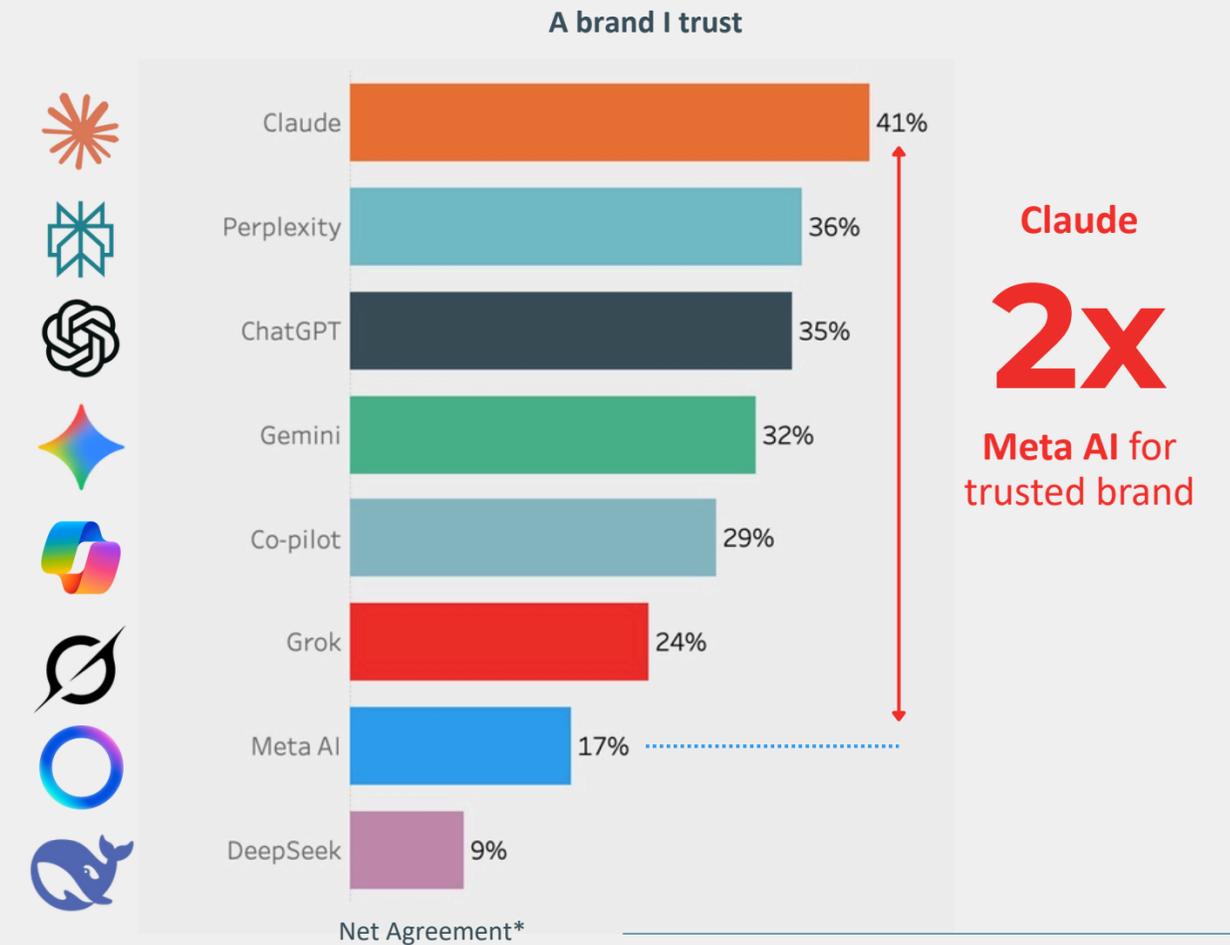
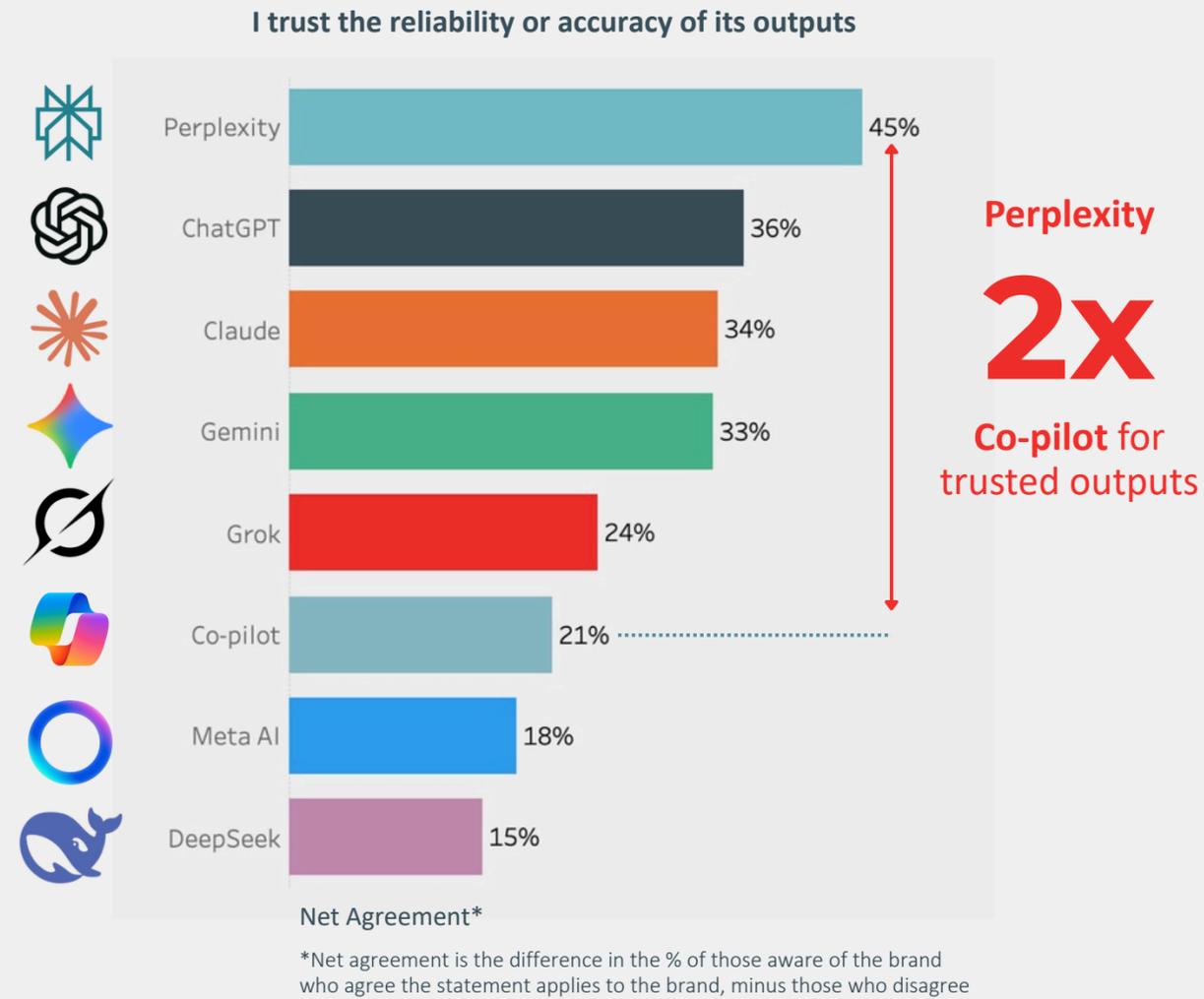
**Why mental availability and use of AI tools matters**

Default tools become default answers; default answers shape default choices.

Sample: n=1,736 Australians aged 16 to 74 years  
Source: AI Brandscape 2026

# Trust is an important differentiator between AI tools

AI challengers such as Perplexity and Claude compete strongly on AI tool trust dimensions



## Trust is conditional

Consumers can value AI while still demanding safeguards, transparency, and control.

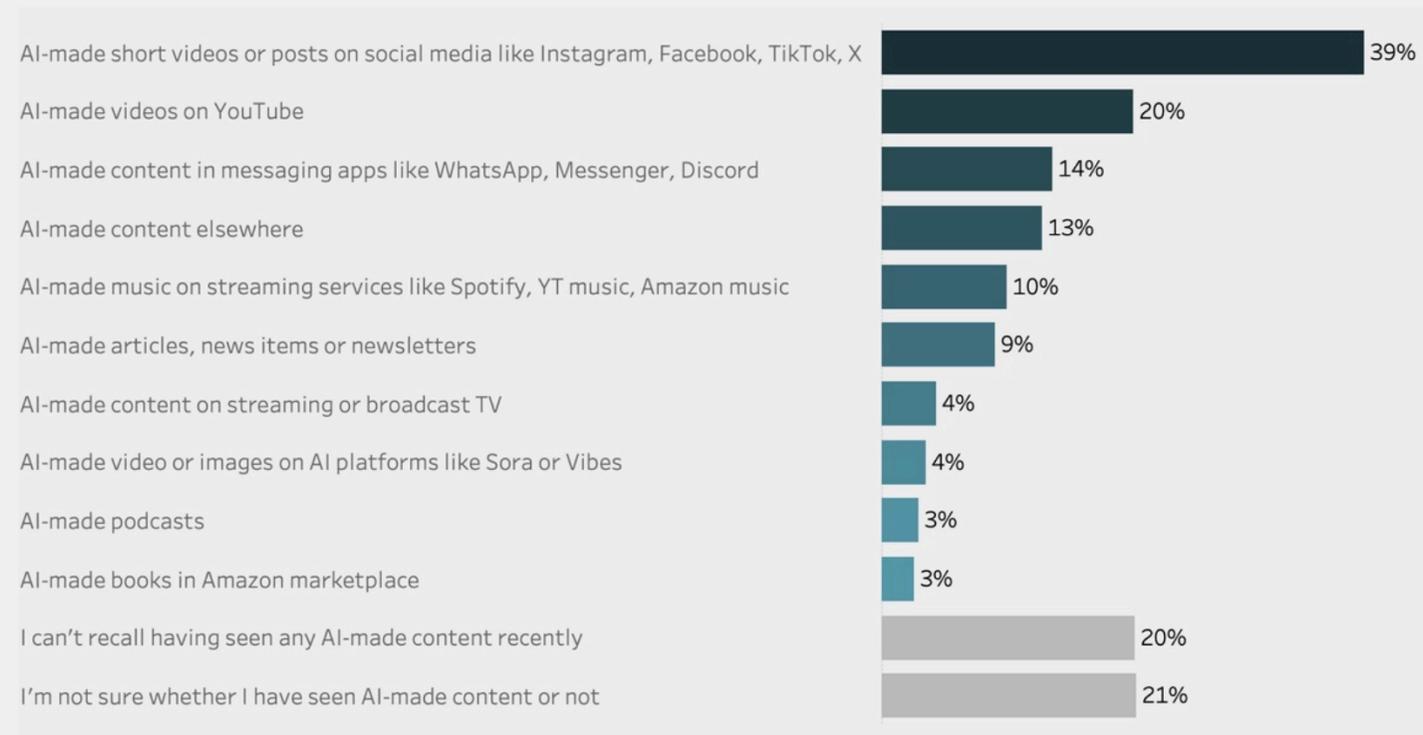
Thinking about <AI Tool>, do you agree or disagree with each of the following statements?

Sample: AI users aware of each brand  
Source: AI Brandscape 2026

# AI-generated content is being noticed, but social users prefer human content

AI-generated content is being noticed by many Australians. Users of social media platforms lack confidence in identifying AI-generated content and still prefer human-made content.

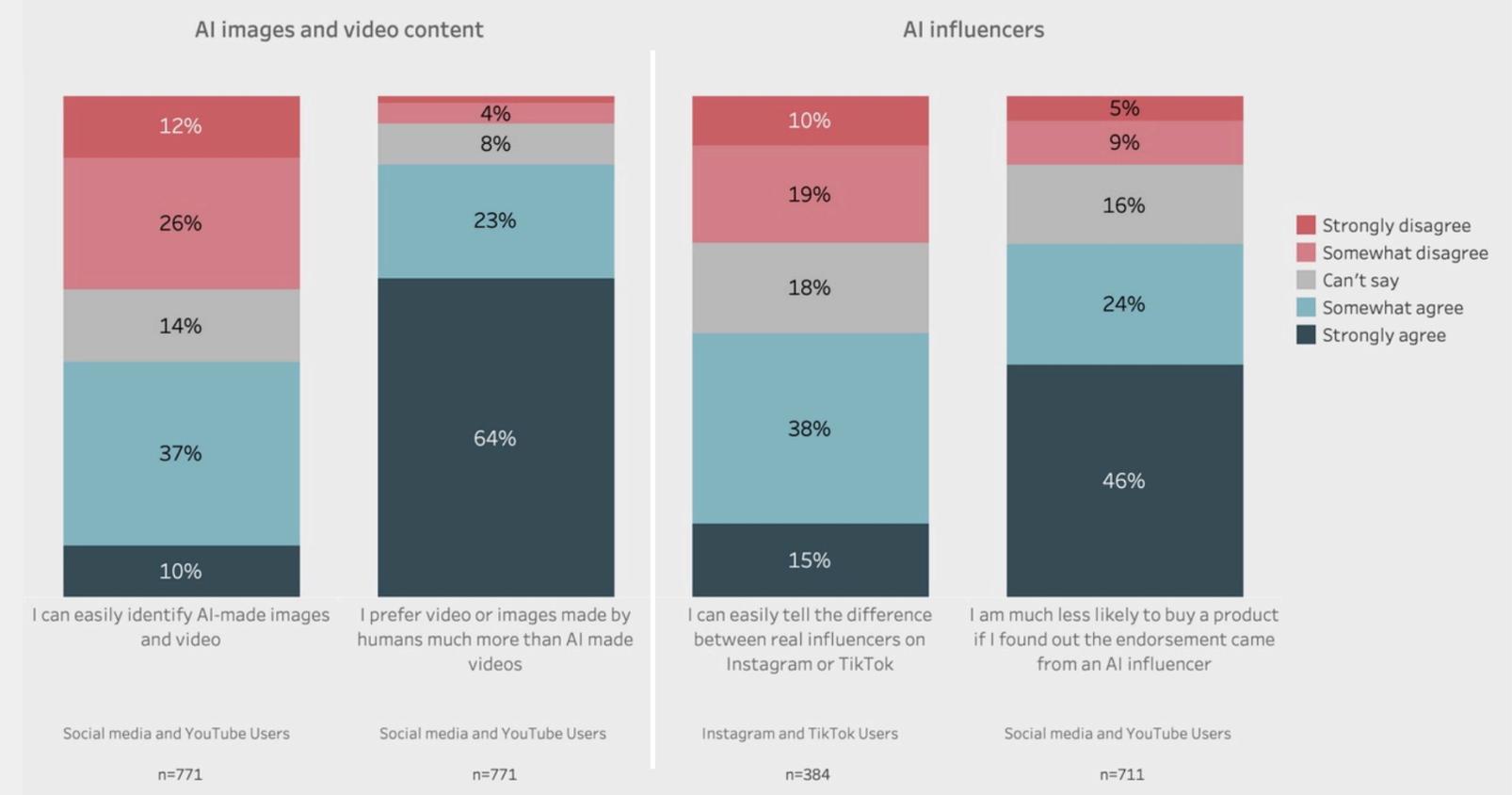
Which, if any, of the following types of AI-made content have you seen or heard recently?



Sample: n=1,302 Australians aged 16 to 74 years

**59%** have encountered AI-generated content of Australians

Please indicate whether you agree or disagree with the following statements:



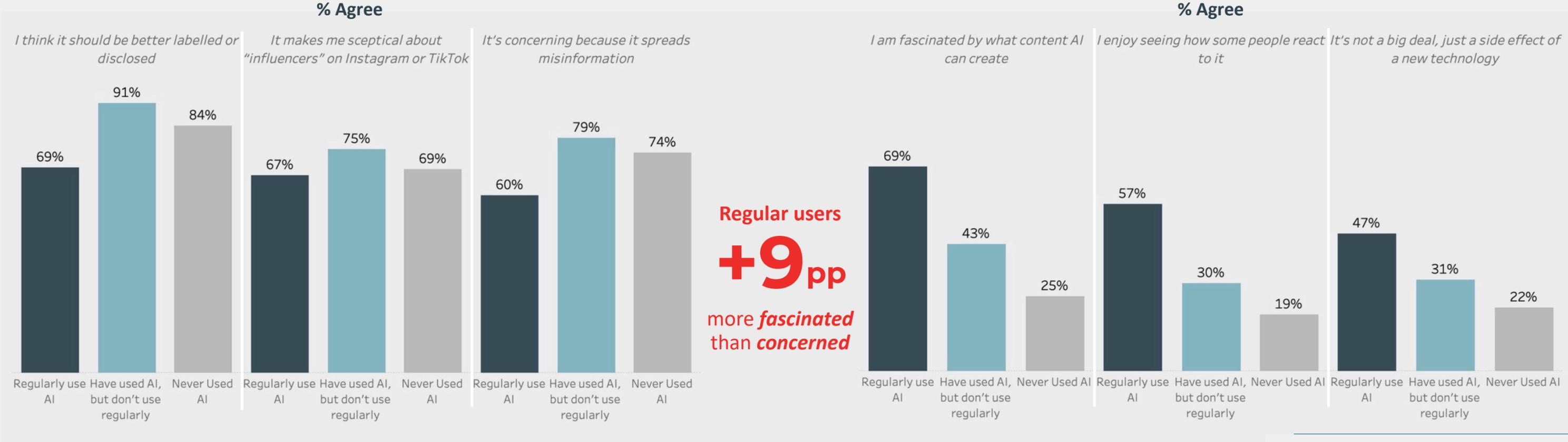
## Creative opportunity vs brand risk

AI content can drive engagement, but elevates authenticity and disclosure expectations.

# Downside risk of AI-generated content is agreed upon by most, but regular users find it engaging

Regular users of AI tools agree with occasional and non-users about downsides of AI-generated content and the need for better disclosure, however they are also fascinated by it.

Which of the following best describes your thoughts or feelings about AI-made content that imitates real people or creates realistic images or videos of things that have not happened?



### Creative opportunity vs brand risk

AI content can drive engagement, but elevates authenticity and disclosure expectations.

Sample: Regular AI users n=876, Occasional users n=310, Never used n=550  
Source: AI Brandscape 2026

# AI Brandscape 2026:

Conclusions and implications  
for marketing leaders



The Navigators

Adoption is mainstream.  
Proficiency is not.

**There is strategic value in equipping both organisations and users with capabilities to leverage AI effectively.**

**Generative AI adoption in Australia has rapidly moved beyond early experimentation into mainstream usage, with 43% of the population now using these tools regularly and a further 20% having tried them.**

- **This reflects high behavioural penetration across age and demographic segments;** a level of ingrained engagement that is beginning to rival established digital technologies.
- **Despite this rapid adoption, proficiency remains uneven:** most users describe themselves as beginners or intermediate in their usage, and use patterns skew towards younger, more digitally confident cohorts.
- **AI is no longer siloed to productivity tasks;** it shapes search behaviour, information discovery, and shopping decisions, with over one-third of Australians (38%) using AI as a substitute or complement to traditional search, and 39% reporting that they have used a generative AI tool to make a purchase decision.

AI is shaping search and commerce.

**Brands must adapt their discovery and conversion strategies to AI-first decision environments.**

**The rapid emergence of AI as a decision infrastructure presents strategic challenges for brands and agencies:**

- **Discovery and visibility dynamics are shifting.** AI mediates what consumers see and trust before traditional search or paid media ever engage them, eroding established channels of brand exposure.
- **Trust and capability gaps persist.** While users acknowledge productivity and convenience gains, concerns about privacy, misinformation, and job impacts remain salient, and users often lack confidence in identifying AI-generated content.
- **Brand positioning in AI ecosystems is undefined.** ChatGPT currently dominates mental availability, but competitor tools are gaining traction on trust and task-specific relevance, signalling early fragmentation rather than a single platform lock-in.

**These dynamics complicate strategic planning.** Marketers must navigate opaque algorithmic contexts, evolving consumer decision pathways, and divergent trust perceptions while maintaining brand integrity and performance.

## Trust will differentiate

Transparency and authenticity are now competitive assets in a landscape rife with synthetic content.

To capitalise on the growth and mitigate risk, organisations should shift from reactive experimentation to strategic integration of AI across brand, media, and customer experience functions:

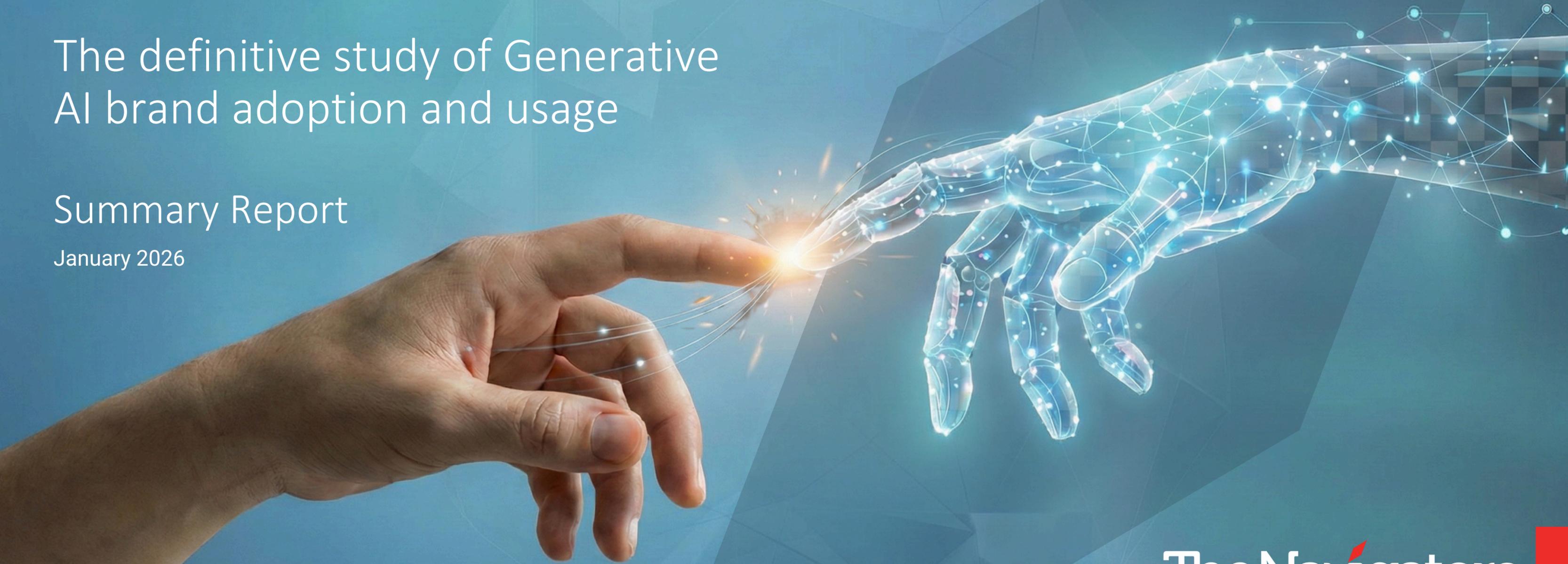
- **Embed AI into the customer decision journey.** Treat AI platforms as primary discovery and decision channels—not fringe add-ons—and ensure brand signals and competitive positioning are optimised for AI-mediated exposure.
- **Build AI capability and trust.** Invest in user education, transparent content practices, and mechanisms to signal authenticity; align with regulatory expectations and user preferences for disclosure.
- **Differentiate through context-specific strategies.** Tailor approaches by use case (e.g., search, shopping, content) and audience segment (e.g., age, skill level), recognising that one size will not fit all in an evolving AI landscape.
- **Monitor and optimise AI platform presence.** Maintain visibility where consumers increasingly trust and interact with AI tools, adjusting tactics as new competitive platforms emerge.

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