Microsoft | AI Economy Institute

Global AI Diffusion

Q1 2026 Trends and Insights



May, 2026

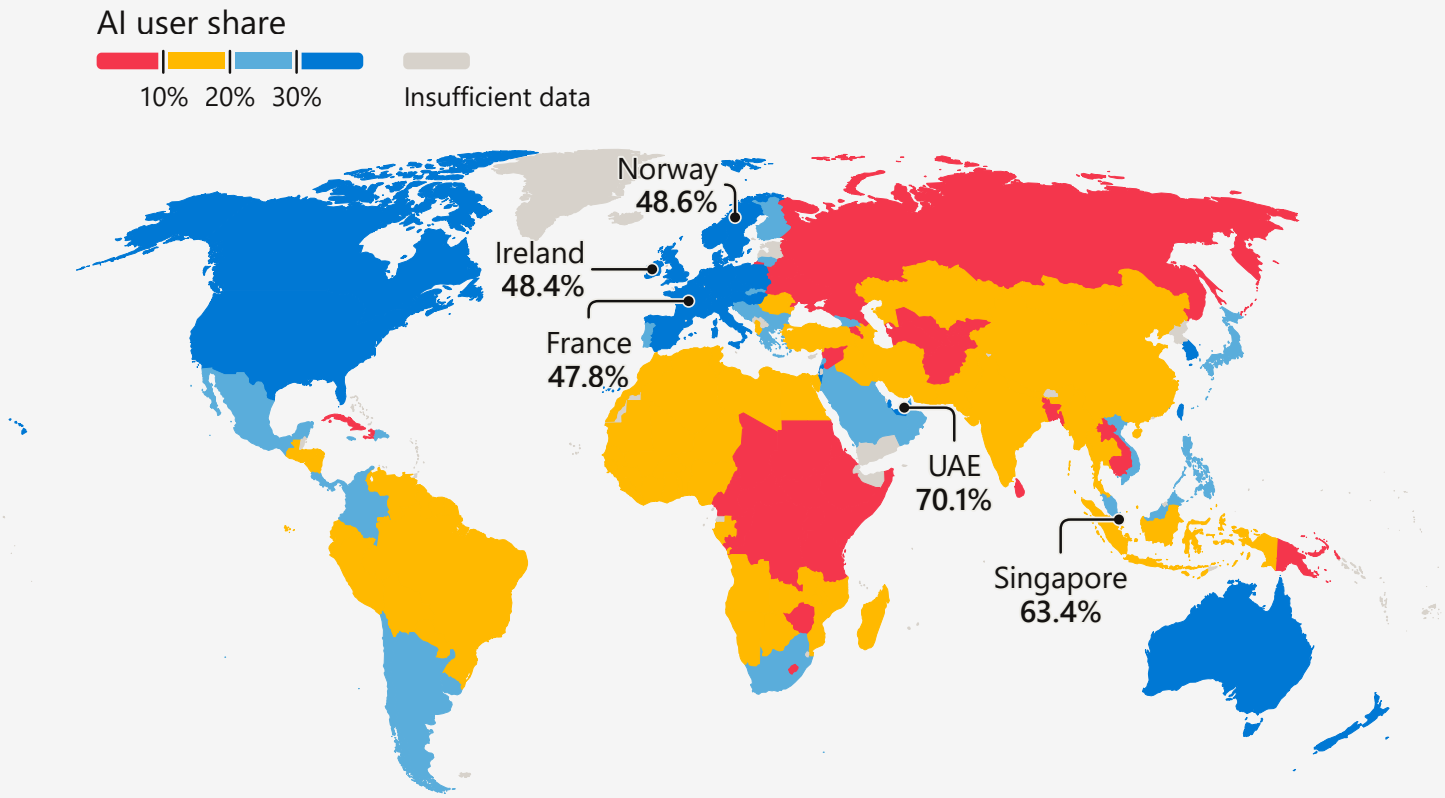
Executive Summary

The global adoption of artificial intelligence continued to rise in the first quarter of 2026. During the quarter, AI usage increased by 1.5 percentage points from 16.3% to 17.8% of the world's working age population. Intensity of use among economies with the highest rates of AI diffusion also increased, with 26 economies now exceeding 30% of the working age population using AI.

At the top of Microsoft's National AI Leaderboard, the UAE continued to lead global AI diffusion at 70.1%. The United States finally started to move up the national rankings, albeit only from 24th to 21st based on a 31.3% usage rate by the working age population.

Notable developments in the quarter included accelerating AI adoption in Asia driven in part by improving AI capabilities in Asian languages. South Korea, Thailand, and Japan saw the greatest movement. More broadly, the quarter brought continued widening of the AI gap between the Global North and South, with usage now at 27.5% in the North and 15.4% in the South. These trends are discussed below, including a deeper dive on the positive impact of enhanced multilingual AI capabilities in Japan.

AI diffusion by economy, March 2026



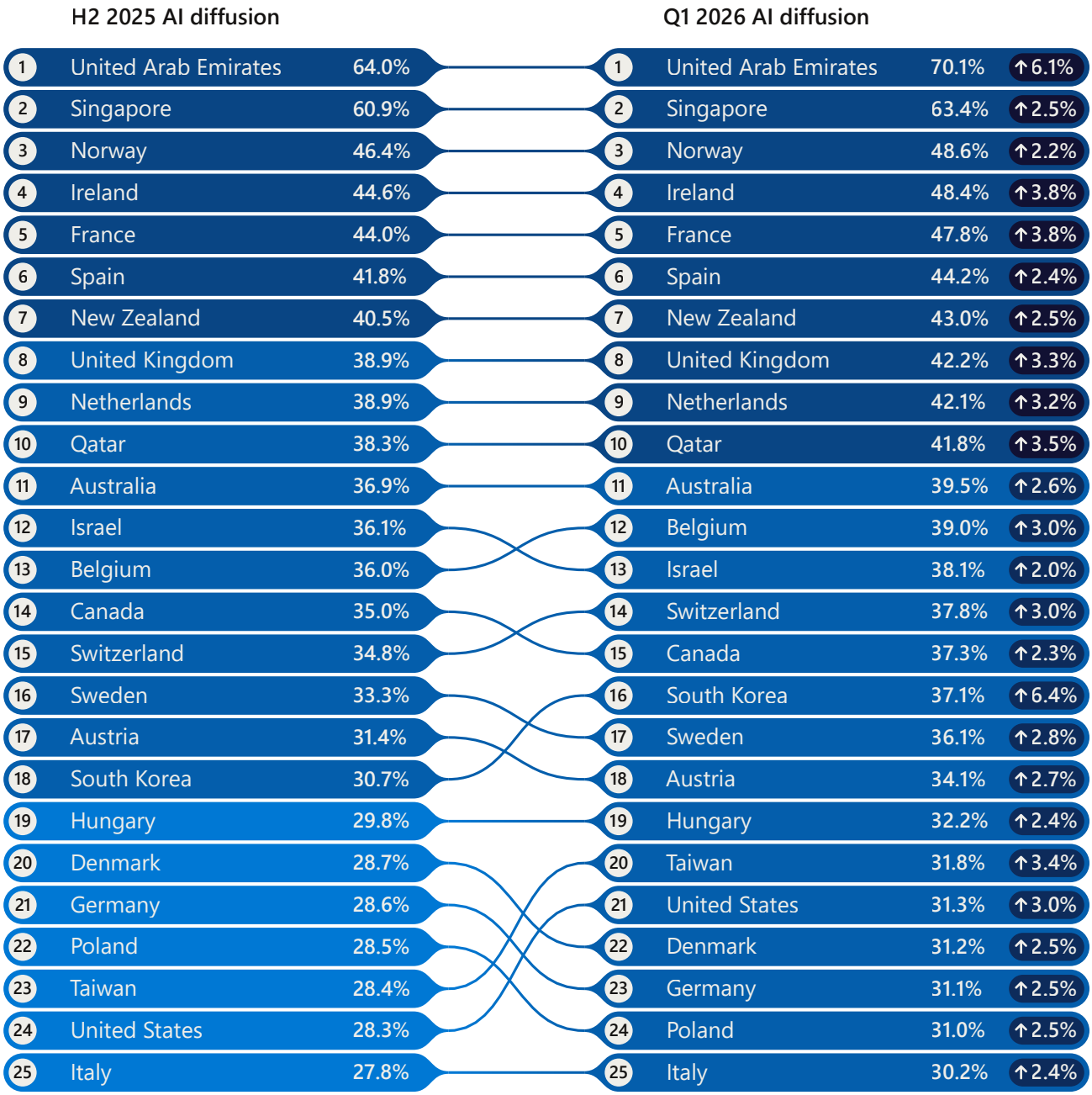
To track all these trends, we continue to measure AI diffusion as the share of people worldwide between ages of 15 and 64 who have used a generative AI product during the reported period. This measure is derived from aggregated and anonymized Microsoft telemetry and adjusted to reflect differences in OS and device-market share, internet penetration, and country population. Additional details on the methodology are available in our AI Diffusion technical paper. **[1]**

No single metric is perfect, and this one is no exception. Through the Microsoft AI Economy Institute, we continue to refine how we measure AI diffusion globally, including how adoption varies across countries in ways that best advance priorities such as scientific discovery and productivity gains. For this report, we rely on the strongest cross-country measure available today, and we expect to complement it over time with additional indicators as they emerge and mature.

Sectorally, the quarter saw strengthened AI coding capabilities leading to a dramatic increase in production of software code. This was reflected in production by Anthropic's Claude Code, the OpenAI's Codex, and Microsoft's GitHub Copilot. Git pushes – through which software developers put coding changes online – increased 78% year over year globally.

Interestingly, the quarter brought added evidence that, at least for now, AI coding capabilities may be increasing demand for the employment of software developers. As discussed in more detail below, when developer productivity increases, the cost of building software declines. If demand for software is elastic, organizations can respond by building more software across a wider range of use cases, including across broader economic sectors. It is still too early to know the full labor-market impact of AI-assisted coding, and this may change over time. But the available data shows that in 2025, total U.S. software developer employment reached approximately 2.2 million, rising 8.5% year over year and marking a record high for the profession. Early data for the first quarter of 2026 shows that software developer employment in March 2026 was about 4% higher than in March 2025.

AI diffusion over time by economy

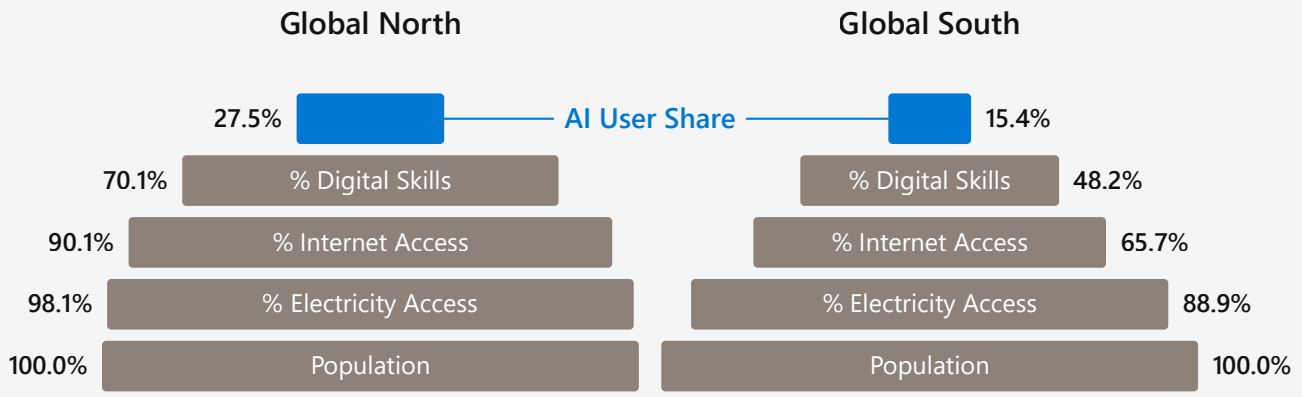


AI adoption in the Global North outpaces the Global South

At the same time, the gap between the Global North and Global South continues to widen, with adoption in the Global North growing more than twice as fast as in the Global South. In the first quarter of 2026, 27.5 percent of the population in the Global North used generative AI, up from 24.7 percent in the second half of 2025, a gain of 2.8 percentage points. In the Global South, usage reached 15.4 percent, up from 14.1 percent, a gain of 1.3 percentage points.

This widening divide reflects the systemic challenges facing the Global South, where limited access to reliable electricity, internet connectivity, and digital skills continues to constrain adoption. Until these foundational gaps are addressed, the benefits of generative AI will remain unevenly distributed, risking a deepening of existing global inequalities.

Region	H1 2025 AI Diffusion	H2 2025 AI Diffusion	Q1 2026 AI Diffusion	Change
Global North	22.9%	24.7%	27.5%	**+2.8**
Global South	13.1%	14.1%	15.4%	**+1.3**
World	15.1%	16.3%	17.8%	**+1.5**
Gap between Global North and Global South	**9.8%**	**10.6%**	**12.1%**	



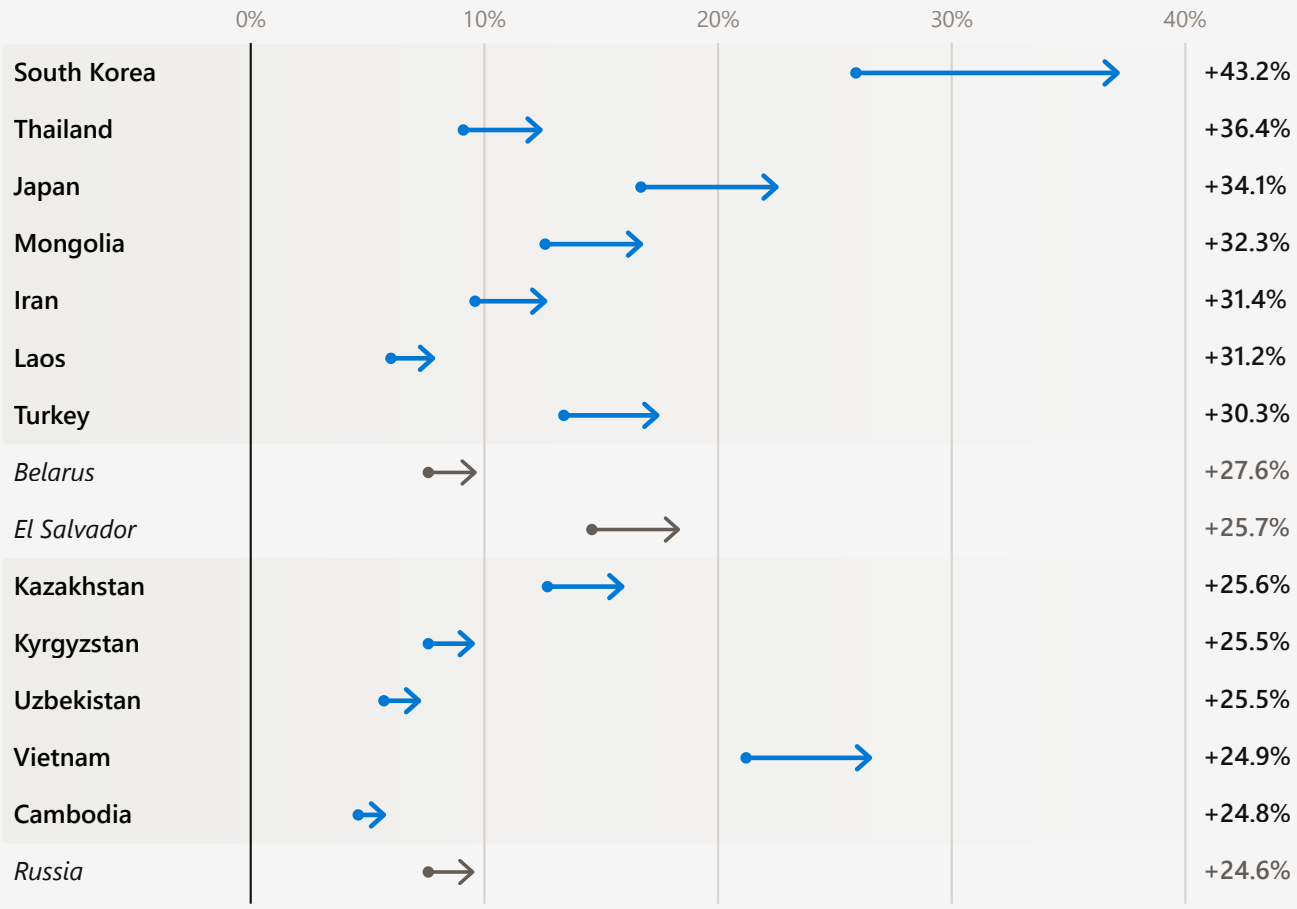
Sources: World Bank Total Population 2024 **[4]**; Share of the population with access to electricity, Our World in Data **[5]**; Individuals using the Internet 2024, ITU **[6]**; Internet users with basic information and data literacy skills, ITU **[7]**.

A New Growth Wave in Asia

In addition to rising AI diffusion among the world's top economies, Asia is experiencing a broader growth wave. Twelve of the fifteen fastest-growing economies since June 2025 are in Asia, and each has at least 25% more AI users than in June 2025. Growth has been led by South Korea (+43%), Thailand (+36%), and Japan (+34%), with similarly strong gains in Mongolia, Iran, Laos, and Turkey (all 30%+). The pattern spans both advanced and emerging economies, including Kazakhstan, Kyrgyzstan, Uzbekistan, Vietnam, and Cambodia.

Fastest growing economies since June 2025

% increase in AI user share, Q1 2026 vs. H1 2025

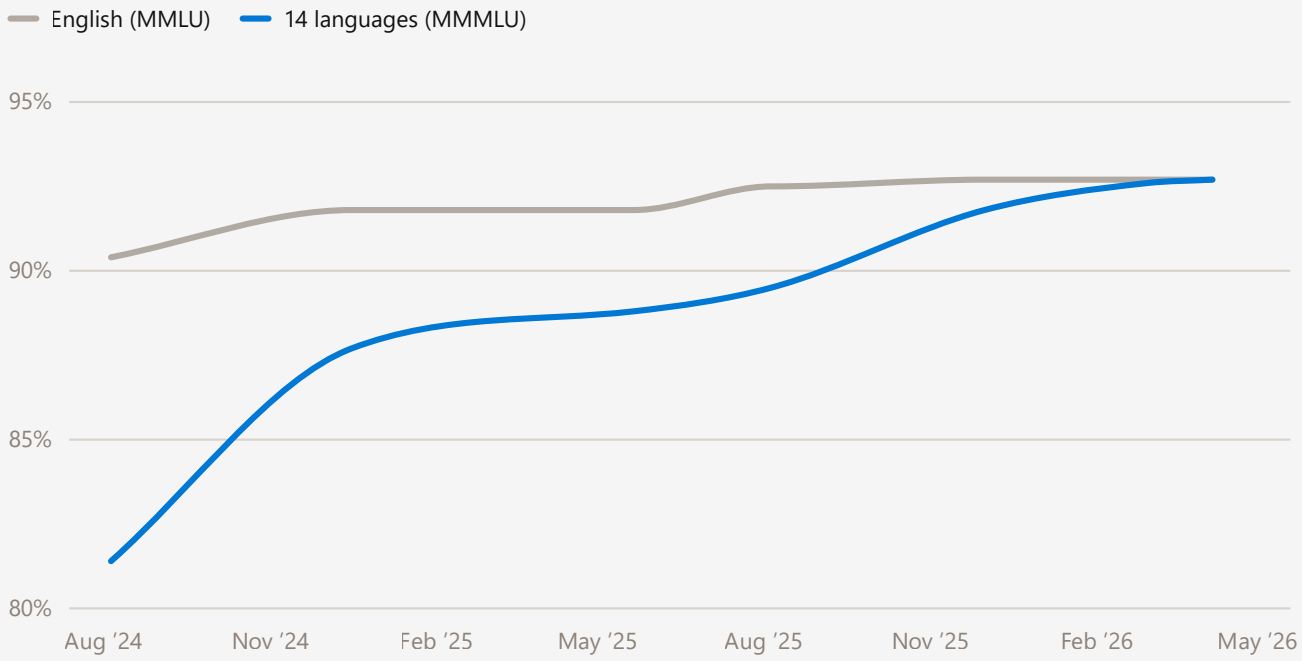


* Italicized economies are outside Asia.

Local Language and Multimodal Capability

One of the key drivers of the surge appears to be the stronger support for local languages and multimodal interaction that has expanded the relevance of AI across diverse user groups. Improvements in non-English language performance, as measured by multilingual benchmarks such as MMMLU **[8]** which assess the same knowledge tasks across 14 languages (Arabic, Bengali, German, Spanish, French, Hindi, Indonesian, Italian, Japanese, Korean, Portuguese, Swahili, Yoruba, and Chinese), have made AI tools increasingly capable of handling multilingual tasks, making them more accessible for everyday use cases such as messaging, search, learning, and content creation. Combined with widespread smartphone adoption and high levels of digital engagement, **[9]** these factors have enabled faster diffusion across both advanced and emerging economies in the region.

How LLMs perform: English compared to 14 languages



Source: MMMLU Leaderboard.

Strong Demand and Rapid Scaling

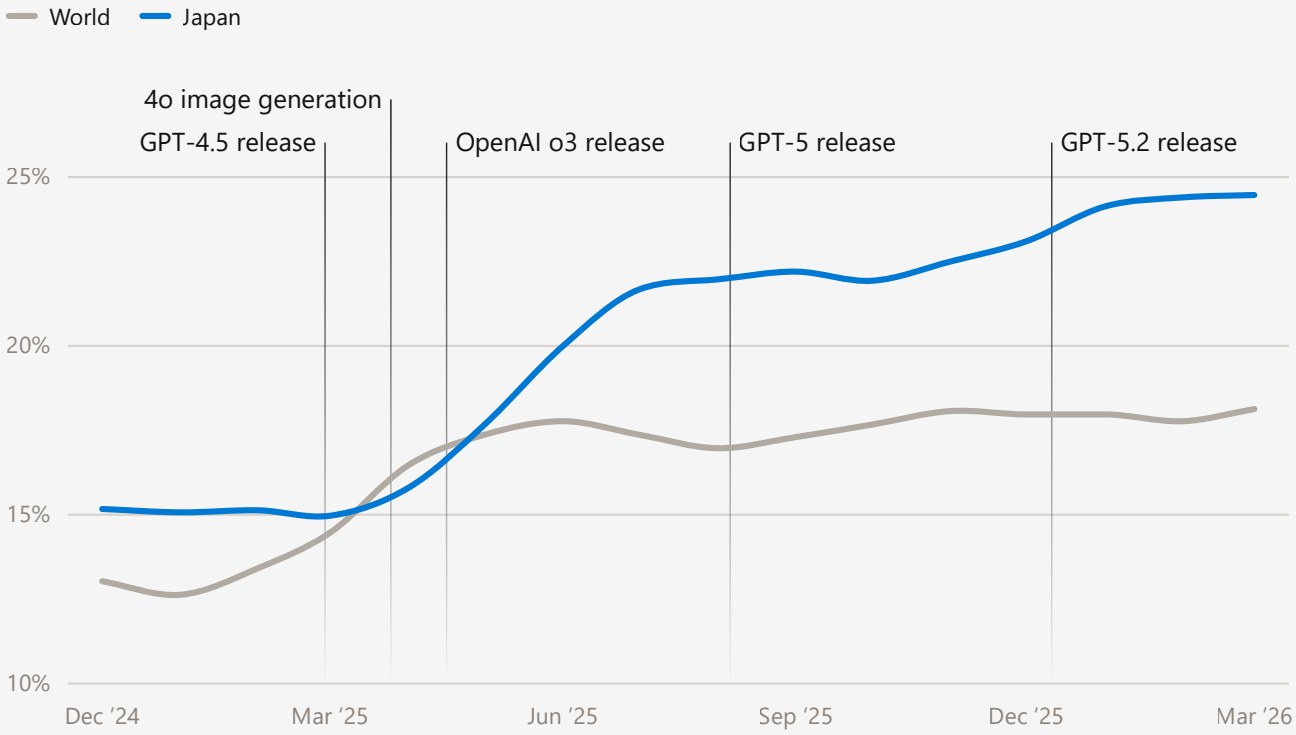
High user demand and a rapid shift from experimentation to real-world usage are reinforcing this growth. Research from McKinsey **[10]** shows that AI adoption in Southeast Asia is growing faster than the global average, with a significant share of organizations moving beyond pilot use cases to scaled deployment. At the same time, the Stanford HAI AI Index **[11]** reports strong positive sentiment toward AI in markets such as Thailand and Turkey, indicating sustained openness and demand. These factors enable adoption to translate quickly into widespread, repeated use.

Japan Accelerates

Japan's position in the global AI diffusion ranking improvedfrom 56th in H1 2025 to 48th in Q1 2026. Over the past quarter, adoption in Japan increased 3.4 percentage points, which is more than three times faster than the global average. This acceleration in diffusion is consistent with improvements in model capabilities and the emergence of a more diversified AI ecosystem, alongside the implementation of national policies coming into effect.

Performance on Japanese professional exams has improved markedly across successive model generations, increasing from approximately 50.8% accuracy in earlier models to over 90% in recent systems. This represents a step change in the ability of AI systems to handle complex, domain-specific tasks in Japanese. **[12][13][14][15]** These improvements are also reflected in standardized Japanese language benchmarks. On the Massive Multitask Language Understanding (MMLU) benchmark, Japanese accuracy increased from approximately 50 percent on GPT-3.5 Turbo to around 80 percent on GPT-4o, reducing the gap with English performance from 20 percentage points to 9. On the more challenging MMLU-Pro benchmark, GPT-5 reached 87 percent in Japanese, exceeding its 85 percent

AI user share (3-month average, %)

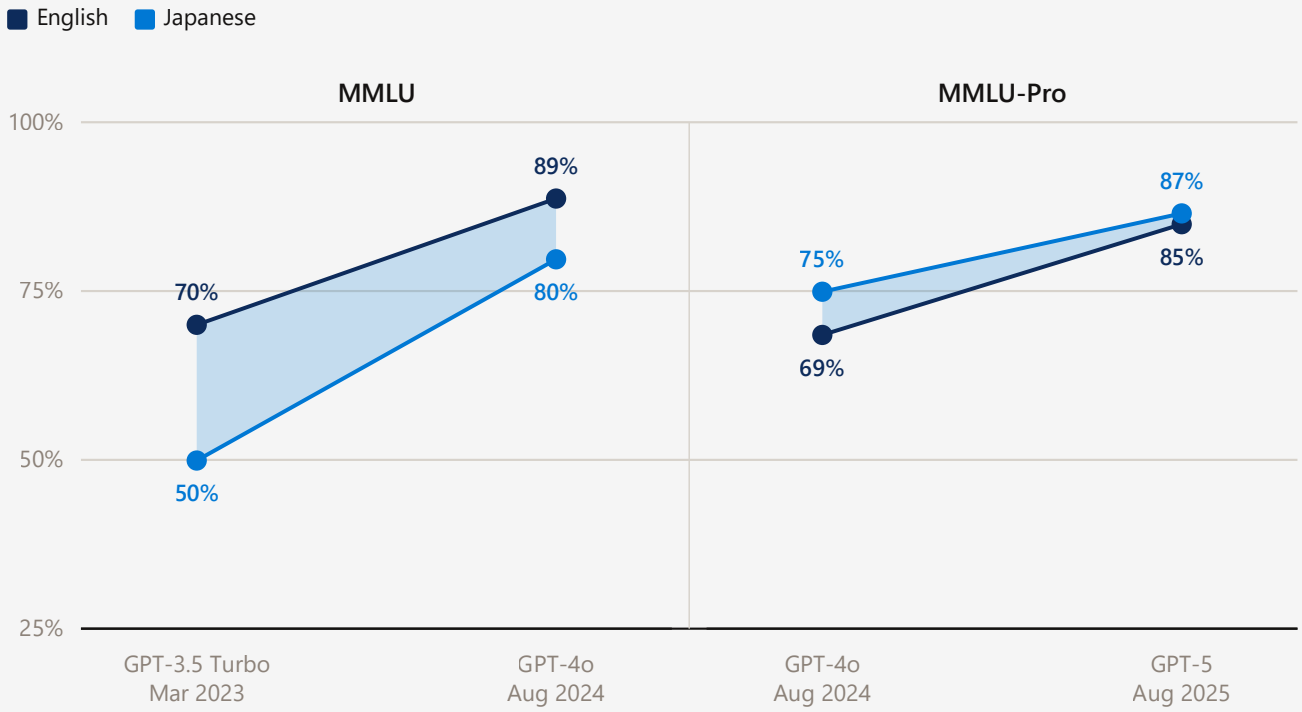


Source: Microsoft AI for Good Lab, OpenAI.

English score. **[16][17][18][19]** As highlighted in the 2025 AI Diffusion Report, **[20]** AI adoption in South Korea increased about five percentage points in the second half of the year after ChatGPT usage surged after GPT-5, substantially better in Korean, was released.

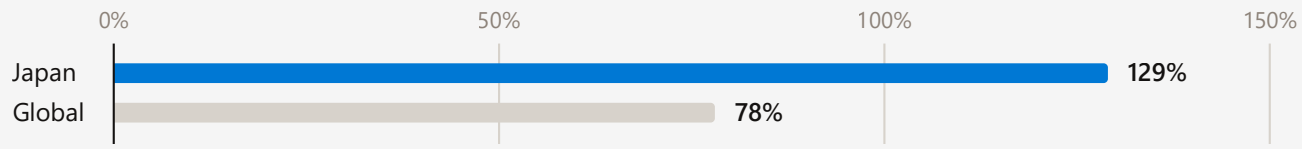
The improvements in Japanese-language AI models are also showing up in how developers work. In Japan, developers uploaded 129% more code changes to GitHub than a year earlier, compared with 78% growth globally.

Better Japanese capability is helping drive AI diffusion in Japan



Source: Benchmarks results compiled from **[16] - [19]**.

Year-over-year growth in Git pushes



Source: GitHub.

New AI Coding models are driving a step-change in GitHub code production

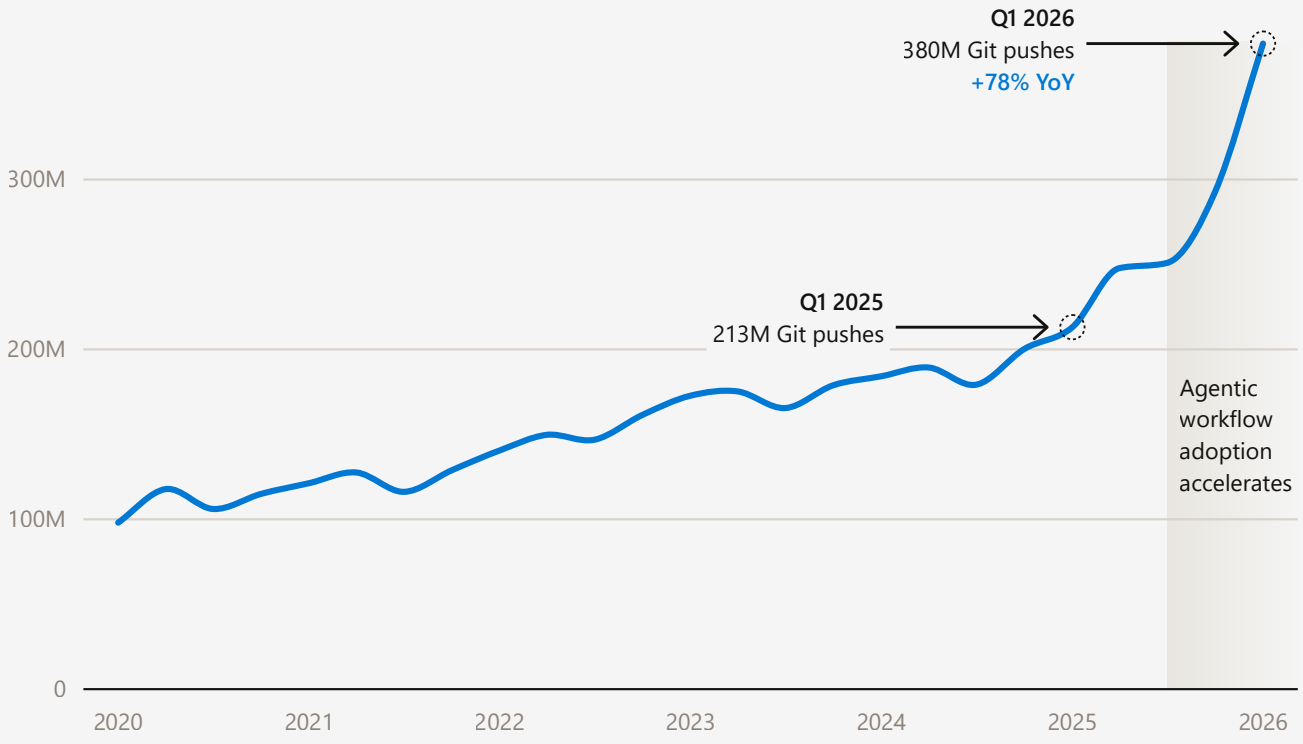
In 2025, Anthropic and OpenAI delivered significant advancements in AI-powered coding tools, with both companies releasing models purpose-built for tackling complex software projects from start to finish.

Anthropic launched Claude Opus 4.5 on November 24, 2025, describing it as state of the art on real-world software engineering tasks. OpenAI launched three successive Codex releases in rapid succession: GPT-5.1-Codex-Max (November 19), GPT-5.2-Codex (December 18), and GPT-5.3-Codex (February 2026).

These tools are designed to support increasingly complex software engineering tasks, showing strong performance on standardized benchmarks and a growing ability to handle real-world development workflows. **[2][21]** For example, GPT-5.3-Codex achieved state-of-the-art results on SWE-Bench Pro and performed strongly on agentic evaluations, including approximately 77% accuracy on Terminal-Bench and around 65% on OSWorld. **[22]**

At the same time, GitHub Copilot evolved from a code suggestion tool into a broader AI coding platform. It introduced support for multiple models, enabled coding agents that can complete tasks and generate pull requests, expanded into the command line, and integrated with collaboration and project management tools. This positioned Copilot as an active participant across the software development lifecycle rather than a tool used only within the editor.

Count of Git pushes globally



Source: GitHub.

Beyond benchmarks, these tools are changing how software gets built and who can build it. They can take on multi step development tasks with little human input, handling everything from writing and debugging code to testing and refining user interfaces. They are also increasingly able to coordinate other agents to manage complex development workflows, making it possible for individuals and teams to accomplish far more than before.

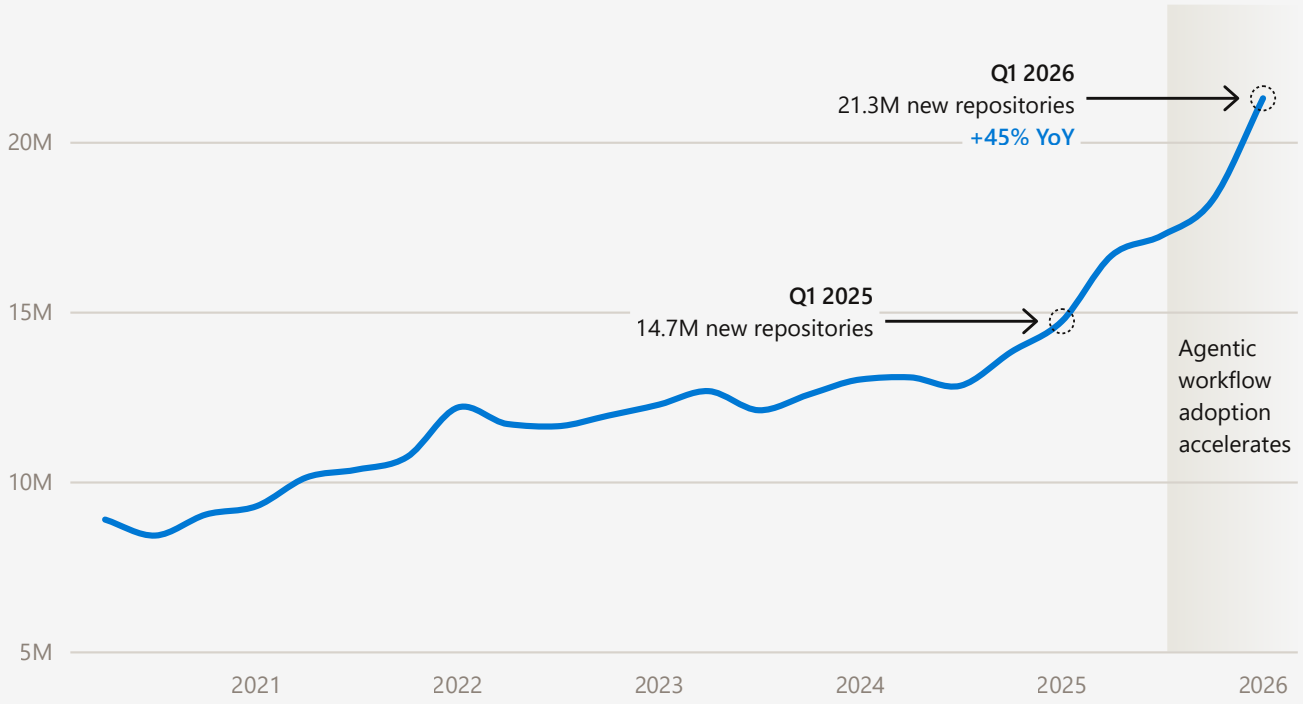
As a result, there has been an expected, but dramatic, increase in code uploads ("Git pushes") in GitHub. Git pushes increased 78% year over year globally.

In the same time period, the number of new Git repositories increased 45% compared with Q1 2025. This trend aligns with the emergence of AI-assisted development practices in which code contributions can scale without a proportional increase in human effort.

Developers and non-developers are "vibe coding," expressing their ideas in natural language and then refining the result through repeated reviews, edits, and code uploads. **[23]**

This shift is already showing up clearly in AI-assisted workflows: merged GitHub pull requests, which measure how often code or updates are downloaded from a shared repository, have grown more than 28x since June 2025 for interactions associated with AI coding agents. While this captures only a fraction of total AI-augmented activity, it provides a useful proxy for the rapid expansion of AI-driven coding workflows.

New repositories created



Source: GitHub.

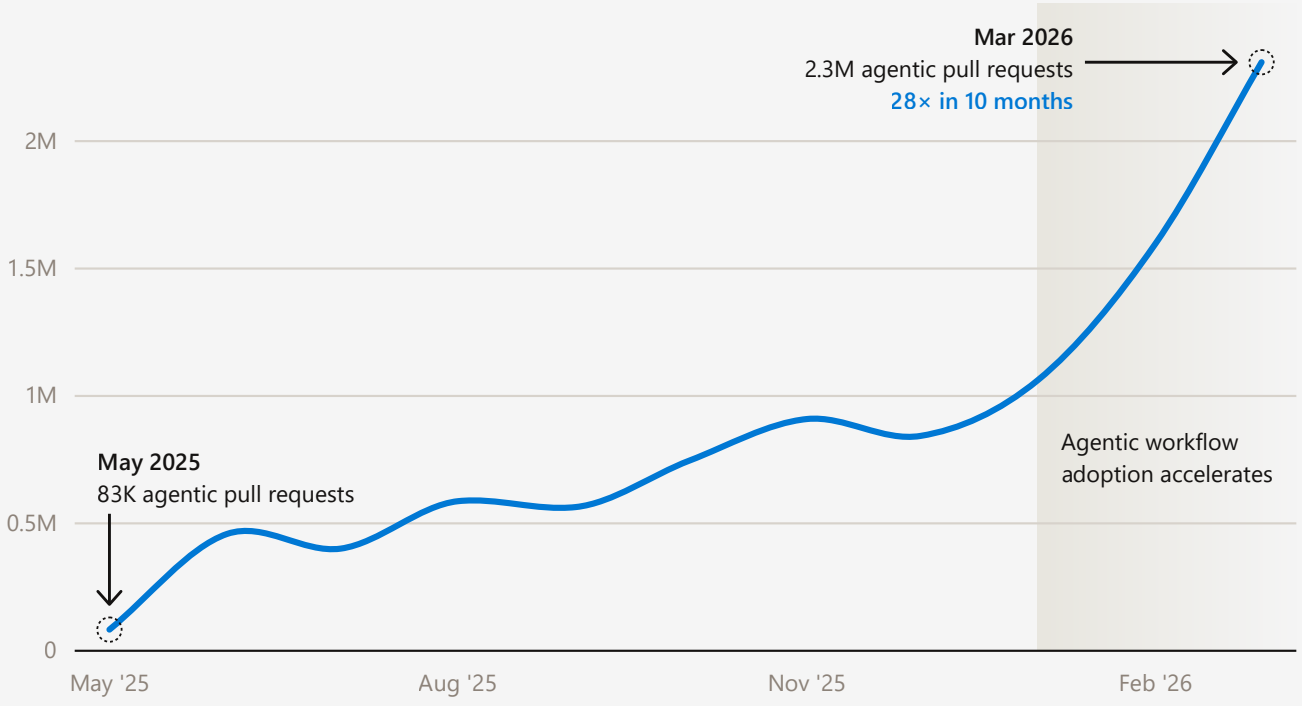
This trend will continue to make software development more dynamic. It is reducing the time to market for new applications and new features, and making it easier to iterate based on performance and user feedback. The rate at which new ideas can be translated into shippable code has never been faster.

That improvement in productivity could, of course, have effects on the labor market.

When developer productivity increases, the cost of building software declines. If demand for software is elastic, organizations can respond by building more software across a wider range of use cases. Economists describe this dynamic through productivity and reinstatement effects: technology can increase labor demand when it expands output and creates new tasks. In software, this mechanism is especially plausible because AI coding tools are already increasing developer output, while official labor projections continue to show strong growth in software-related roles.

It is still too early to know the full labor-market impact of AI-assisted coding, but the available data is consistent with this theory. In 2025, total software developer employment reached approximately 2.2 million, rising 8.5% year over year and marking a record high for the profession. Early BLS data also shows that software developer employment in March 2026 was about 4% higher than in March 2025. **[24]**

Count of GitHub pull requests associated with AI agents



Source: GitHub.

Conclusion

AI adoption continued to accelerate in Q1 2026, but the benefits are spreading unevenly. The Global North is pulling further ahead of the Global South, underscoring the need to address foundational gaps in electricity, connectivity, digital skills, and local-language access. At the same time, Asia is emerging as a major growth engine, with Japan, South Korea, and several emerging economies showing rapid gains as AI tools become more useful in local languages and daily workflows. The clearest sign of AI's near-term economic impact is in software development, where new coding models and agentic tools are dramatically increasing code production, repository creation, and AI-assisted development activity. Together, these trends suggest that AI diffusion is entering a new phase: broader, faster, and more practical, but also one that requires deliberate action to ensure its benefits are shared globally.

Citation and data availability

This report is based on the following technical paper:

Misra, A., Wang, J., McCullers, S., White, K., & Lavista Ferres, J. (2025). Measuring AI Diffusion: A Population-Normalized Metric for Tracking Global AI Usage. arXiv. **https://doi.org/10.48550/arXiv.2511.02781**
Also available at: **https://aka.ms/AI_Diffusion_Technical_Report**

The underlying data used in this report is publicly available:

AI Diffusion dataset (Q1 2026 update):
https://raw.githubusercontent.com/microsoft/ai-diffusion-report/main/data/AI_Diffusion_Q12026_Update.csv

When using this data, please cite the technical paper above and include a link to the dataset to ensure reproducibility and version transparency.

Appendix

[1] A. Misra, J. Wang, S. McCullers, K. White, and J. L. Ferres, "Measuring AI Diffusion: A Population-Normalized Metric for Tracking Global AI Usage," Nov. 04, 2025, arXiv: arXiv:2511.02781. doi: 10.48550/arXiv.2511.02781. **https://arxiv.org/abs/2511.02781**

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AI Diffusion Data Source

Economy	H1 2025	H2 2025	Q1 2026	Q1 Change
United Arab Emirates	59.4%	64.0%	70.1%	6.1%
Singapore	58.6%	60.9%	63.4%	2.5%
Norway	45.3%	46.4%	48.6%	2.2%
Ireland	41.7%	44.6%	48.4%	3.8%
France	40.9%	44.0%	47.8%	3.8%
Spain	39.7%	41.8%	44.2%	2.4%
New Zealand	37.6%	40.5%	43.0%	2.5%
United Kingdom	36.4%	38.9%	42.2%	3.3%
Netherlands	36.3%	38.9%	42.1%	3.2%
Qatar	35.7%	38.3%	41.8%	3.5%
Australia	34.5%	36.9%	39.5%	2.6%
Belgium	33.5%	36.0%	39.0%	3.0%
Israel	33.9%	36.1%	38.1%	2.0%
Switzerland	32.4%	34.8%	37.8%	3.0%
Canada	33.5%	35.0%	37.3%	2.3%
South Korea	25.9%	30.7%	37.1%	6.4%
Sweden	31.2%	33.3%	36.1%	2.8%
Austria	29.1%	31.4%	34.1%	2.7%
Hungary	27.9%	29.8%	32.2%	2.4%
Taiwan	26.4%	28.4%	31.8%	3.4%
United States	26.3%	28.3%	31.3%	3.0%
Denmark	26.6%	28.7%	31.2%	2.5%
Germany	26.5%	28.6%	31.1%	2.5%
Poland	26.4%	28.5%	31.0%	2.5%
Italy	25.8%	27.8%	30.2%	2.4%
Czech Republic	26.0%	27.8%	30.1%	2.3%
Jordan	25.4%	27.0%	29.7%	2.7%
Bulgaria	25.4%	27.3%	29.7%	2.4%
Finland	25.6%	27.3%	29.5%	2.2%
Saudi Arabia	23.7%	26.2%	29.4%	3.2%
Slovenia	24.6%	26.5%	29.0%	2.5%
Costa Rica	25.1%	26.5%	28.5%	2.0%
Lebanon	24.8%	25.7%	27.3%	1.6%
Vietnam	21.2%	23.5%	26.5%	3.0%
Oman	22.6%	24.2%	26.5%	2.3%
Portugal	22.4%	24.2%	26.4%	2.2%
Croatia	21.8%	23.7%	26.1%	2.4%
Slovak Republic	22.1%	23.8%	26.1%	2.3%
Dominican Republic	22.0%	22.7%	24.8%	2.1%
Uruguay	20.9%	22.5%	24.6%	2.1%

Economy	H1 2025	H2 2025	Q1 2026	Q1 Change
Colombia	20.4%	22.0%	24.5%	2.5%
Lithuania	21.0%	22.4%	24.3%	1.9%
Serbia	19.7%	21.5%	24.1%	2.6%
Jamaica	22.2%	22.1%	24.0%	1.9%
Panama	20.3%	21.5%	23.3%	1.8%
South Africa	19.3%	21.1%	23.1%	2.0%
Chile	19.6%	20.8%	22.7%	1.9%
Japan	16.7%	19.1%	22.5%	3.4%
Bosnia And Herzegovina	18.2%	19.5%	22.1%	2.6%
Argentina	17.8%	19.6%	21.9%	2.3%
Malaysia	18.3%	19.7%	21.8%	2.1%
Kuwait	17.7%	19.1%	21.1%	2.0%
Greece	17.7%	19.1%	20.8%	1.7%
Georgia	17.3%	18.2%	20.5%	2.3%
Mexico	16.7%	17.8%	20.1%	2.3%
Philippines	17.1%	18.3%	20.1%	1.8%
Ecuador	17.0%	17.7%	19.5%	1.8%
Brazil	15.6%	17.1%	19.1%	2.0%
Albania	15.8%	16.5%	18.5%	2.0%
Moldova	16.6%	17.0%	18.5%	1.5%
El Salvador	14.6%	16.2%	18.3%	2.1%
Azerbaijan	14.2%	15.5%	17.7%	2.2%
India	14.2%	15.7%	17.6%	1.9%
Romania	15.3%	16.2%	17.5%	1.3%
Turkey	13.4%	14.6%	17.4%	2.8%
Mongolia	12.6%	14.3%	16.7%	2.4%
Guatemala	13.7%	14.8%	16.4%	1.6%
Peru	13.4%	14.7%	16.4%	1.7%
China	15.4%	16.3%	16.4%	0.1%
Kazakhstan	12.7%	13.7%	15.9%	2.2%
Namibia	13.0%	13.8%	15.1%	1.3%
Gabon	12.3%	13.4%	15.0%	1.6%
Libya	12.7%	13.7%	15.0%	1.3%
Egypt	12.5%	13.4%	14.8%	1.4%
Botswana	12.8%	13.7%	14.8%	1.1%
Nepal	12.3%	13.0%	14.2%	1.2%
Indonesia	11.7%	12.7%	14.1%	1.4%
Honduras	12.4%	13.1%	14.0%	0.9%
Senegal	12.4%	12.9%	13.9%	1.0%
Tunisia	12.3%	12.7%	13.5%	0.8%

Economy	H1 2025	H2 2025	Q1 2026	Q1 Change
Algeria	11.3%	12.0%	13.2%	1.2%
Zambia	11.7%	12.3%	13.1%	0.8%
Cote D'Ivoire	10.8%	11.7%	13.1%	1.4%
Bolivia	10.9%	11.6%	12.7%	1.1%
Iran	9.6%	10.7%	12.6%	1.9%
Iraq	10.3%	11.2%	12.5%	1.3%
Thailand	9.1%	10.7%	12.4%	1.7%
Paraguay	10.1%	11.0%	12.2%	1.2%
Nicaragua	10.0%	10.7%	11.8%	1.1%
Morocco	10.5%	10.9%	11.7%	0.8%
Gambia	10.6%	10.9%	11.4%	0.5%
Pakistan	9.7%	10.3%	11.4%	1.1%
Angola	8.9%	9.7%	10.9%	1.2%
Madagascar	8.9%	9.7%	10.9%	1.2%
Malawi	8.9%	9.7%	10.9%	1.2%
Mozambique	8.9%	9.7%	10.9%	1.2%
French Guiana	8.3%	9.0%	10.3%	1.3%
Guyana	8.3%	9.0%	10.3%	1.3%
Suriname	8.3%	9.0%	10.3%	1.3%
Venezuela	8.3%	9.0%	10.3%	1.3%
Benin	8.7%	9.3%	10.1%	0.8%
Burkina Faso	8.7%	9.3%	10.1%	0.8%
Ghana	8.7%	9.3%	10.1%	0.8%
Guinea	8.7%	9.3%	10.1%	0.8%
Guinea-Bissau	8.7%	9.3%	10.1%	0.8%
Liberia	8.7%	9.3%	10.1%	0.8%
Mali	8.7%	9.3%	10.1%	0.8%
Mauritania	8.7%	9.3%	10.1%	0.8%
Niger	8.7%	9.3%	10.1%	0.8%
Nigeria	8.7%	9.3%	10.1%	0.8%
Sierra Leone	8.7%	9.3%	10.1%	0.8%
Togo	8.7%	9.3%	10.1%	0.8%
Myanmar	8.4%	9.1%	10.0%	0.9%
Lesotho	8.8%	9.1%	9.8%	0.7%
Belarus	7.6%	8.4%	9.6%	1.2%
Kyrgyzstan	7.6%	8.2%	9.5%	1.3%
Russia	7.6%	8.0%	9.5%	1.5%
Ukraine	9.1%	9.0%	9.4%	0.4%
Kenya	7.8%	8.1%	8.7%	0.6%
Cameroon	7.0%	7.8%	8.7%	0.9%

Economy	H1 2025	H2 2025	Q1 2026	Q1 Change
Central African Republic	7.0%	7.8%	8.7%	0.9%
Chad	7.0%	7.8%	8.7%	0.9%
Congo	7.0%	7.8%	8.7%	0.9%
Democratic Republic Of The Congo	7.0%	7.8%	8.7%	0.9%
Zimbabwe	6.9%	7.6%	8.5%	0.9%
Haiti	7.1%	7.6%	8.5%	0.9%
Laos	6.0%	6.7%	7.8%	1.1%
Bangladesh	6.5%	7.1%	7.8%	0.7%
Papua New Guinea	7.2%	7.3%	7.7%	0.4%
Burundi	6.4%	6.8%	7.6%	0.8%
Eritrea	6.4%	6.8%	7.6%	0.8%
Ethiopia	6.4%	6.8%	7.6%	0.8%
Somalia	6.4%	6.8%	7.6%	0.8%
South Sudan	6.4%	6.8%	7.6%	0.8%
Sudan	6.4%	6.8%	7.6%	0.8%
Tanzania	6.4%	6.8%	7.6%	0.8%
Uganda	6.4%	6.8%	7.6%	0.8%
Syria	6.7%	7.1%	7.5%	0.4%
Armenia	6.2%	6.6%	7.4%	0.8%
Sri Lanka	6.2%	6.6%	7.3%	0.7%
Rwanda	6.0%	6.3%	7.2%	0.9%
Uzbekistan	5.7%	6.3%	7.2%	0.9%
Cuba	5.7%	6.1%	6.7%	0.6%
Afghanistan	5.1%	5.6%	6.1%	0.5%
Tajikistan	5.1%	5.6%	6.1%	0.5%
Turkmenistan	5.1%	5.6%	6.1%	0.5%
Cambodia	4.6%	5.1%	5.7%	0.6%

