

NAVIGATING THROUGH TURBULENCE

The AI edition



Latest insights underpinning
decisions for the year ahead

A WORLD FACING ONGOING CRISES, UNCERTAINTY AND WEAK ECONOMIC GROWTH IS NOT AN EASY ONE TO NAVIGATE.

This is the backdrop against which business leaders need to make choices. Not only to secure short term performance goals, but to lay the foundations for longer-term sustainable success.

“ The rise of AI poses an existential danger to humankind, not because of the malevolence of computers, but because of our own shortcomings.”

Yuval Noah Harari

Professor of History at the Hebrew University of Jerusalem.

A core building block for both the short and long-term is strengthening your business’s reputation and your employer brand.

The strength or weakness of your reputation can make the difference between having market access and a favourable regulatory environment – or not. It can influence how much you are trusted – by all your audiences, especially those you want to work for you or buy your services and products.

And AI is a variable of growing importance to sustainable business performance and organisational culture.

How it is used or misused, together with its impact on jobs, are key to population perspectives on businesses. That is why AI is at the heart of this edition of ‘Navigating through turbulence’.

Communications and HR professionals play a central role in helping business leaders manage the impact of AI on the experience and perceptions of their full range of stakeholders.

Thoughtful advice on the action needed to both protect and strengthen your reputation from the inside out is critical – and that advice needs to be based on evidence and carefully curated insights.

I hope this edition provides you with some of those insights – on the wider context and latest trends helping underpin your advice and action.



Ghassan

Ghassan Karian

Chief Executive,
Ipsos Karian and Box

AN AI JUDGEMENT DAY COMING?

As a metallic foot crunches down on an anonymous human skull at the beginning of James Cameron's Terminator 2: Judgement Day, set a mere five years from now, the message is unambiguous. The apocalypse will be universal. Our experience of the rise and supremacy of AI will be the same everywhere – the skull is all of us.

We enjoy these bleak narratives and they're trotted out frequently in discussions about AI. But in reality the arrival of AI – a genie that regardless of our views has now truly fled the bottle – has offered no one singular experience.

There is no consensus among public figures, and no universality of experience across global populations.

A 2023 survey of 2,778 AI researchers¹, for example, saw seven in ten regarding AI as largely positive; but more than a third still gave at least a 10% chance of advanced AI leading to outcomes as bad as human extinction.

For every Andreessen claiming AI Will Save The World², there are others – such as the signatories of the Bletchley declaration on AI³ – who see 'potential for serious, even catastrophic harm,' from AI models.

Simply worrying about whether the skull is ultimately still out there waiting for us is counterproductive. So are hypothetical doomsday scenarios, diverting as they are. In this report we focus on what is. Drawing on data from across the world we explore the tapestry of experience, hope and dread around AI, not to prognosticate ruin, but to guide positive steps.

Seeing where the ambiguities lie is an invitation to explore them. Measuring the gap between what employees and their employers think offers a starting point for discussion. Recognising that the AI experience differs between generations, industries and economies is a critical first step towards understanding.

Donald Trump, a thinker not always known for precision, was accurate about AI. 'We're right at the beginning of it,' he told an interviewer. And so we are. Which means the united strategies to help businesses, nations and the human collective navigate this paradigm shift and benefit positively from AI are still being formed.

Our research is here to offer some illumination on that new path. In the face of fear, rational inquiry that informs constructive, consequential action is vital. Otherwise we may end up at the end of a different AI tragedy, slumped like the ailing replicant in Ridley Scott's Blade Runner, mourning the opportunities lost like tears in rain.

Key facts

Optimism, confidence and trust all fragile at a time of major turbulence



of world are not optimistic about the future of their country

The world is facing a series of interlocking challenges and people are not confident we are overcoming them currently. Just 31% are optimistic about the next 12 months for their country – but the little optimism that there is is not shared equally. The "Global North" are particularly pessimistic

Conflicted views on AI making our world better AND our jobs less secure...



believe AI will have a positive impact

Nearly six in ten (57%) agree it will have a positive impact, but again, optimism is not shared equally. The Global North remains more cautious than the Global South.



gap in confidence of direction of their organisation between executives and employees

Just half feel confident about the direction of their organisation, but there is a gap between senior executives and other employees. 63% of executive decision makers are confident, while only 47% of the remaining employees are confident about their organisation's direction.



employees are worried about AI's impact on their job security

44% of the world's workers say they are concerned about what AI will mean for their job – compared to just 28% who are not. AI will undoubtedly create new jobs that we haven't heard of, but the public are not convinced it will lead to more than are lost. 48% think it will destroy more, 40% think it will create more.



do not trust business leaders to tell the truth

Business leaders have a clear trust issue – that figure falls to under one in three in Britain, France and Germany



Proportion senior executives more likely to think AI will make their job easier than other employees

60% of executives say AI will make their job easier, while just 42% of employees think it will. This will harm adoption if workforces don't see the benefits of AI.

¹ https://aiimpacts.org/wp-content/uploads/2023/04/Thousands_of_AI_authors_on_the_future_of_AI.pdf

² <https://ai62.com/ai-will-save-the-world/>

³ <https://www.gov.uk/government/publications/ai-safety-summit-2023-the-bletchley-declaration/the-bletchley-declaration-by-countries-attending-the-ai-safety-summit-1-2-november-2023>

A FEARFUL FUTURE

Under one in three of the world population is optimistic.

We are living in a complex, interconnected world with seemingly endless problems.

Geopolitical tensions are rising across the globe with more conflict always just over the horizon.

Inflation may have cooled, but that does not mean people are not feeling the pinch still. Wages haven't caught up with price rises.

And Governments around the world are not exactly overflowing with funds. There is slow economic growth everywhere.

AI has now arrived – and while it brings awe and wonder – there is fear over its misuse.

And there is arguably the biggest issue of them all: climate change.

It is a threat to our very existence, but due to everything else we are facing it isn't getting the full attention it needs.

Not a uniform outlook

People's experiences around the world vary. It is not all doom and gloom everywhere.

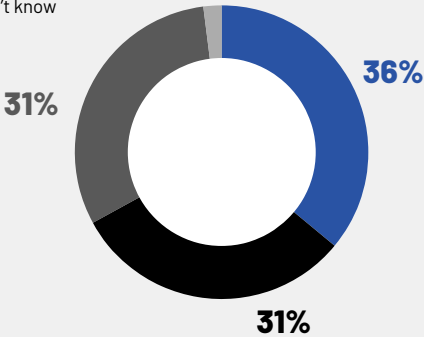
Ask someone in Nigeria, Indonesia or India, and they will likely have a much more positive outlook on their country's prospects.

Yet if you ask someone in France or Japan, there is a good chance they will be bleak about their country's future.

This is a complex and interconnected world, but also a deeply divided one.

Looking ahead to the next 12 months, are you optimistic or pessimistic about the world in general?

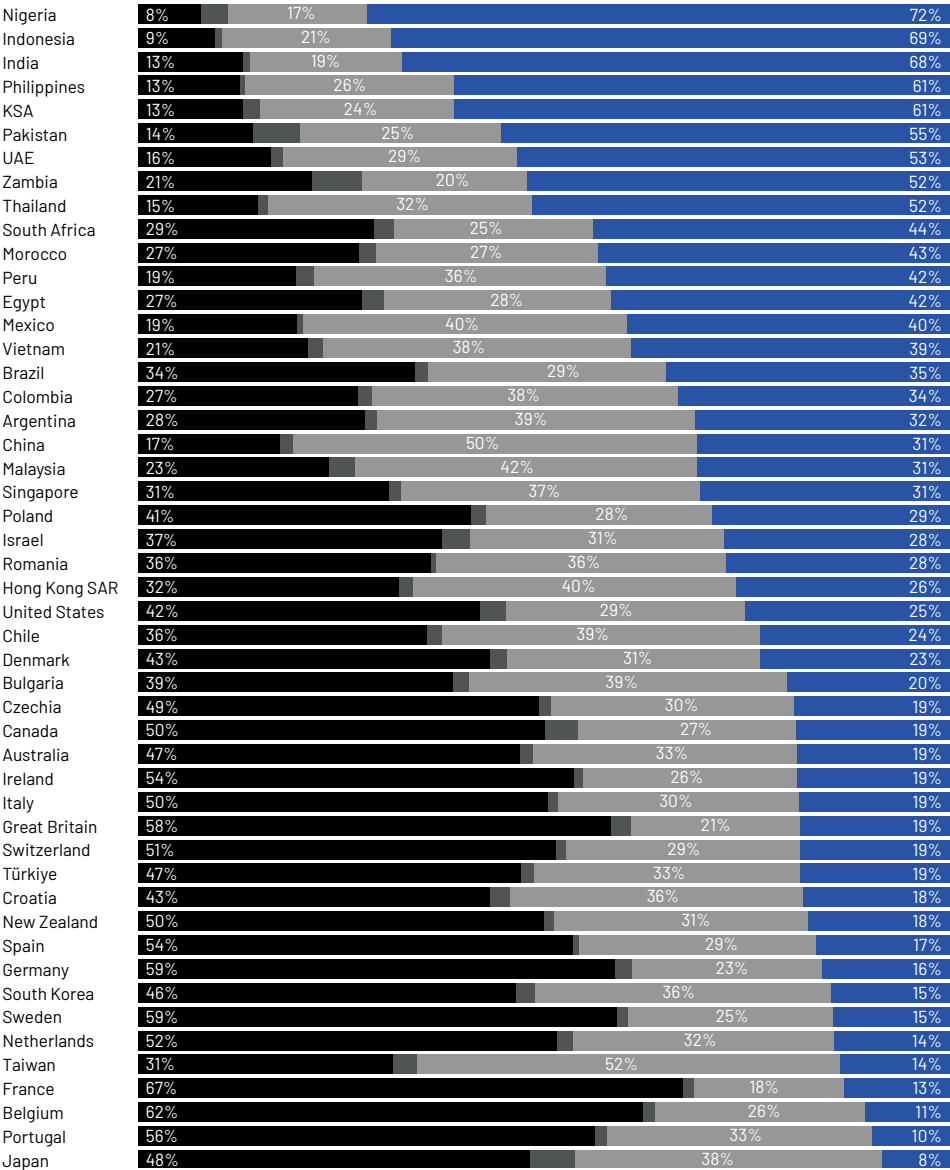
■ Optimistic
■ Pessimistic
■ Neither
■ Don't know



Optimism varies significantly across many of the world's countries

Looking ahead to the next 12 months, are you optimistic or pessimistic about the the world in general?

■ Very/fairly pessimistic ■ Don't know ■ Neither ■ Very/fairly optimistic



WHERE ARE WE GOING?

Half of the global population feel confident about the future direction of their organisation.

People need reassuring their employer’s organisation can make it through the current economic woes.

A key undercurrent in this global pessimism is the economy. Six in ten describe the economic situation in their country as bad.

Job security is on people’s minds. Even the tech giants of Silicon Valley are making employees redundant.

The future is uncertain. There is great opportunity if you look for it; adopt AI correctly and you can gain an edge, while the energy transition offers another chance to ‘find oil’. But the economic challenges of right now are somewhat obscuring that view.

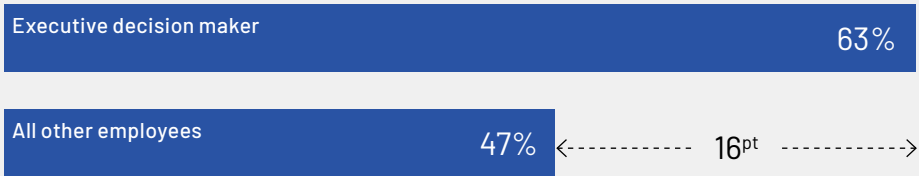
Many organisations are planning or making structural or operational changes that reflect a more digitally-enabled world of work.

Against this backdrop, people in service economies tend to be less confident about the future of their organisations.

But there is a disconnect: senior leaders in businesses are much more confident in the direction of their organisation than employees. Some of this will be because leaders have been cocooned in a C-Suite bubble. Equally, many senior executives have simply not communicated their business’s strategy (and the reasons for it) well enough.

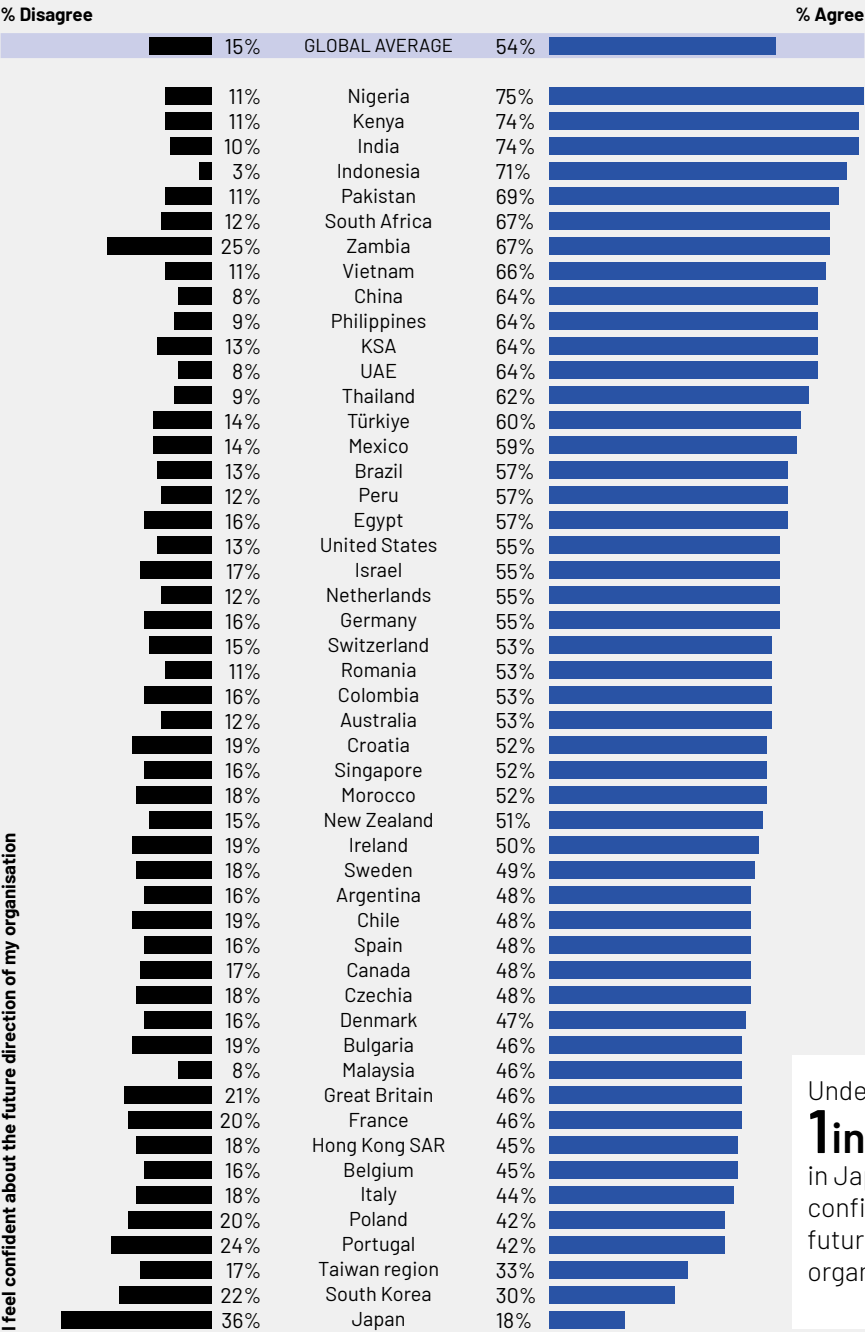
This has serious implications for business. Ipsos Karian and Box research has shown that securing strategy buy-in is an important foundation for helping deliver it.

Major confidence gap between leaders and rest of workforce



Global Trends Index: 15,629 executive decision makers and 19,135 other employees surveyed in the markets shown between 15 February and 23 April 2024. For full methodology see ipsosglobaltrends.com

I feel confident about the future direction of my organisation



I feel confident about the future direction of my organisation

Under 1 in 5 in Japan confident about future of their organisation

Global Trends Index: 35,243 employed adults surveyed in the markets shown between 15 February and 23 April 2024. For full methodology see ipsosglobaltrends.com

TRUTH AT THE TOP

Half of employees do not trust business leaders to tell the truth.

It might not just be the economy that is impacting people's confidence in their organisation.

Businesses obviously have a role to play in helping many of the issues that are overwhelming the world right now.

But if their leaders are not trusted to tell the truth, they may end up being seen as a part of the problem rather than the solution.

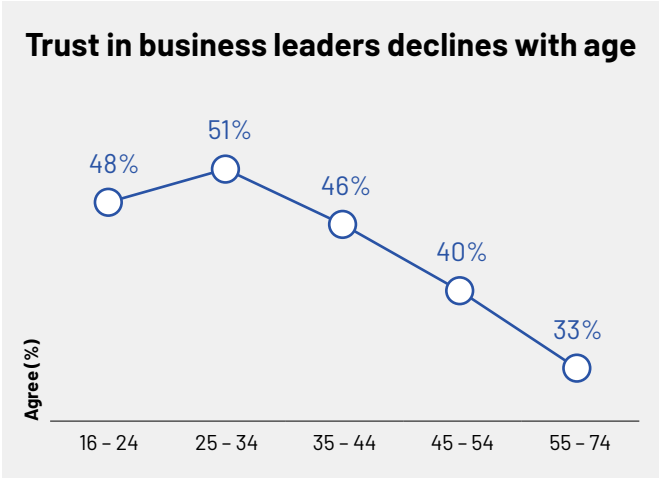
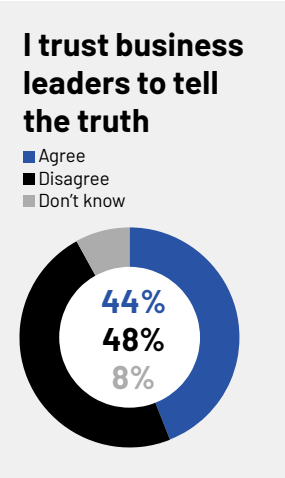
In some countries in Europe, trust falls to as low as one in five.

Generational mistrust

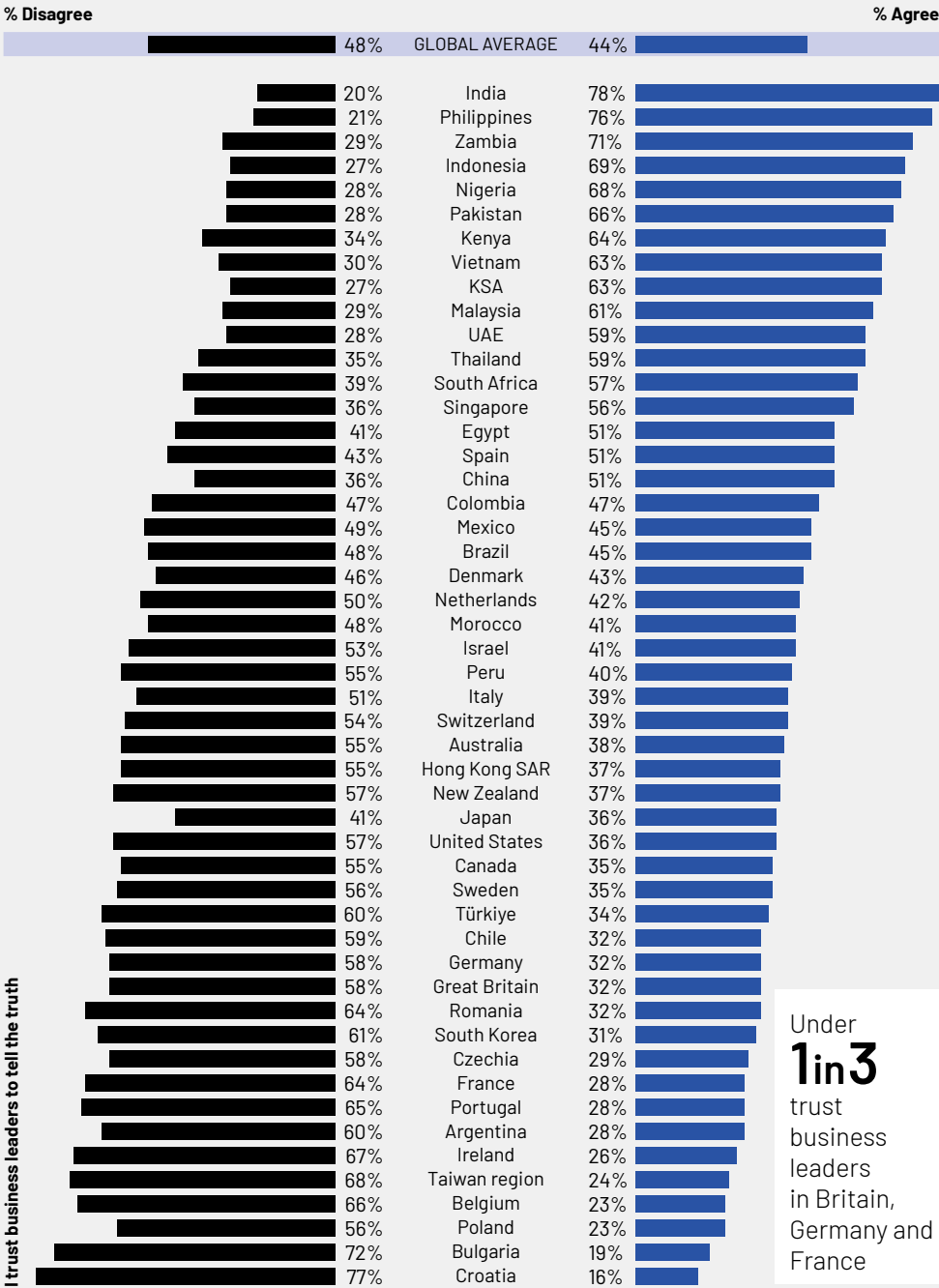
Younger employees are more willing to take what they are told by business leaders at greater face value. Trust falls with age – almost half of 18-24 year-olds trust their leaders, compared to around a third of over-55s.

This mirrors a similar trend in confidence, where younger employees tend to feel more confident about the future of their organisation, suggesting a complex interplay of trust and confidence.

It may be that only a few business leaders tarnish the good work of many others. But those who are good have their work cut out to make sure they are not painted with the same brush.



I trust business leaders to tell the truth



Under
1 in 3
trust
business
leaders
in Britain,
Germany and
France

An abstract digital graphic featuring a central, glowing, multi-colored sphere (pink, blue, and purple) with a complex, wireframe-like structure. Numerous thin, blue lines radiate outwards from the sphere, each ending in a small blue dot. The background is a deep blue with a subtle pattern of dots and lines, creating a sense of depth and connectivity.

THE ADVANCE OF AI

As AI proliferates, different countries are having different experiences. What is the prevailing mood as the world wakes up to the promise and perils of the new technology?

TECHNOWONDERFUL WORLD

A majority believe AI will have a positive impact on world.

But people are conflicted; a majority also fear that technical progress is destroying our lives.

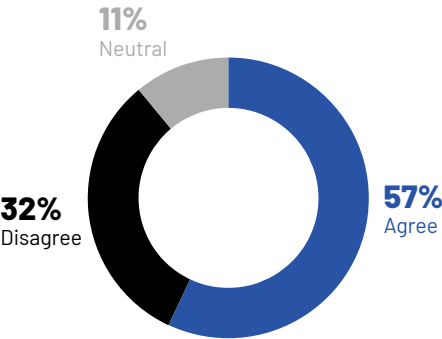
AI is set to revolutionise the world we live in, but optimism is not shared equally around the world.

The 'global North' appears to be more cautious over whether it will benefit us, but Asia and Africa are much more positive.

In this critical election year, AI-enabled fake news thankfully appears to have played a lesser role than initially feared.

But how will this global imbalance in attitudes play out? Will workforces in Asia and Africa get a significant head start in AI use over the West?

Artificial Intelligence is having a positive impact on the world we live in

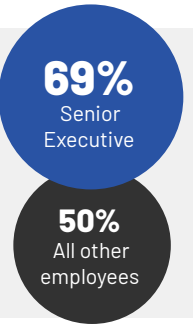


Global Trends Index: 50,237 adults surveyed in the markets shown between 15 February and 23 April 2024. For full methodology see ipsosglobaltrends.com.

AI is another area where we see senior executives out of step with employees.

Seven in ten executives believe in AI's potential, while only half of all employees do.

Fear of losing their job may be a factor here – globally, two in five employees are concerned about the impact of AI on their job security – but a lack of belief in AI will harm people's adoption of the technology.

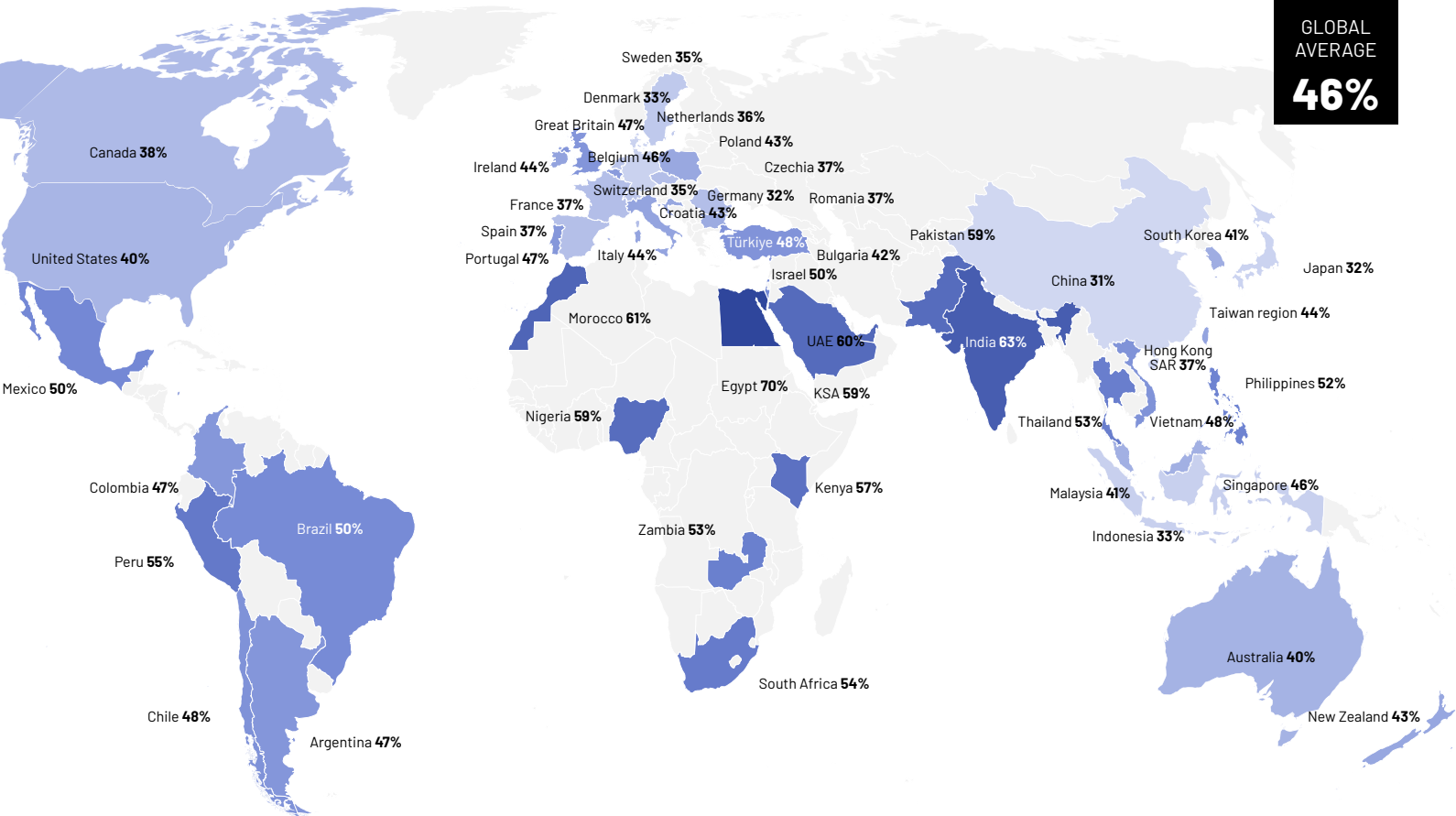


Global optimism on impact of AI much stronger in Asia and Africa

Artificial Intelligence is having a positive impact on the world we live in

Low belief that AI will have a positive impact

High belief that AI will have a positive impact



GLOBAL AVERAGE
46%

WHAT WILL AI DO?

Will AI really give us the efficiency benefits we crave, or will it make us all lose our jobs? Will it do both?

The world's workers agree AI will have a positive impact on jobs in some shape or form. And it offers a way to make the stuff of dreams for management a reality in the shape of improved productivity. People will be able to do more in the same amount of time.

Employees are more likely to say that AI will have a positive impact on their job than not – but the question is more about whether they will still have their job after its adoption.

There is trepidation over its impact on the job market. Yes, some jobs will be enhanced through its efficiency, but others may be eradicated. Currently unknown new jobs will arise from it. It is this uncertainty that is causing unease in workforces.

Guiding employees through this digital transformation, while keeping them on side, may be a challenge for executive teams in the coming years.

Cultural differences are also playing a big role in people's views of AI. The 'Global North' is far more nervous about AI than the 'Global South'.

A lot of the economies in the Global North are service-based – one possible reason for their hesitation over the technology. Service-based jobs are much more likely to be negatively affected by AI.

Yet we see the anglosphere in particular being the most nervous out of the Global North. Many of the biggest large language models (LLMs) have been trained on the English language. It could be that greater exposure to these AI models is causing people's unease.

Japan is the true outlier in all of this: they are significantly less nervous than anyone but are not as excited as their Asian counterparts.



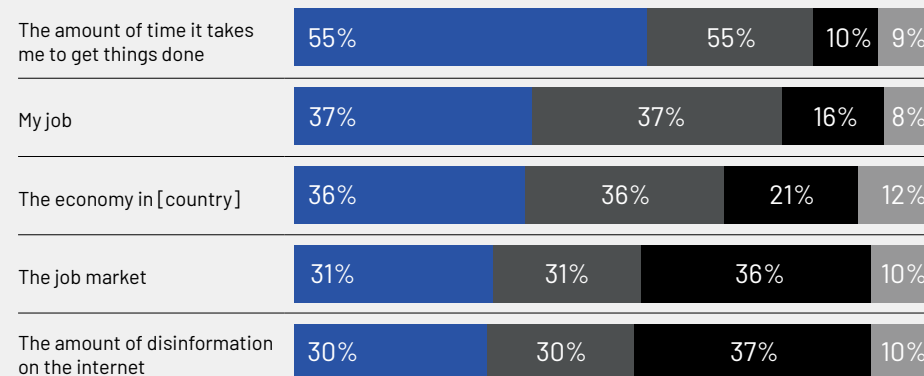
The robots were coming for our jobs, our lives, our very humanity. The Silicon Valley overlords proclaimed AI would solve all our problems, while secretly plotting to turn us into their pet monkeys. We'd be reduced to banana-addicted court jesters, tap dancing for teensy scraps of dopamine tossed by our robot rulers."

Kurt Vonnegut*

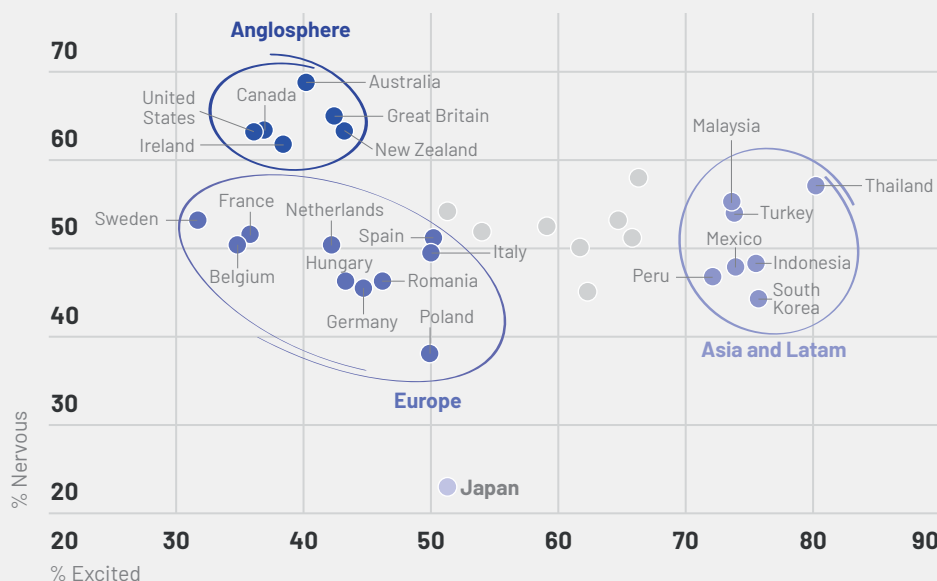
World's workers believe AI will have broadly positive impact on getting things done, but negative impact on economy and jobs

Do you think the increased use of artificial intelligence will make the following better, worse or stay the same in the next 3-5 years?

■ Better ■ About the same ■ Worse ■ Don't know



Anglosphere most nervous about AI



GAPS AND CONFLICT EVERYWHERE YOU LOOK...

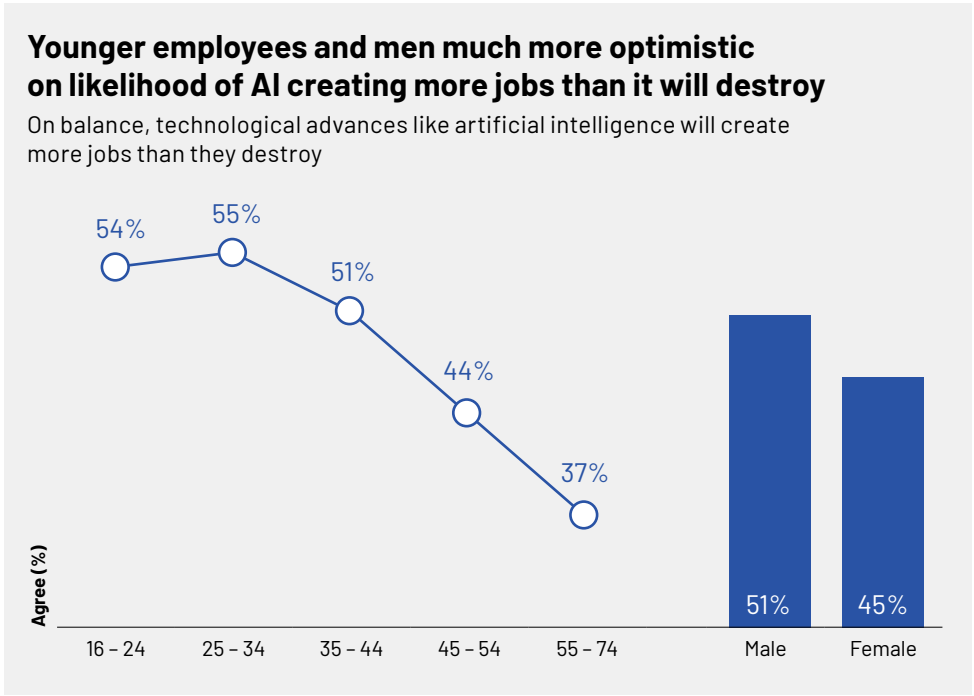
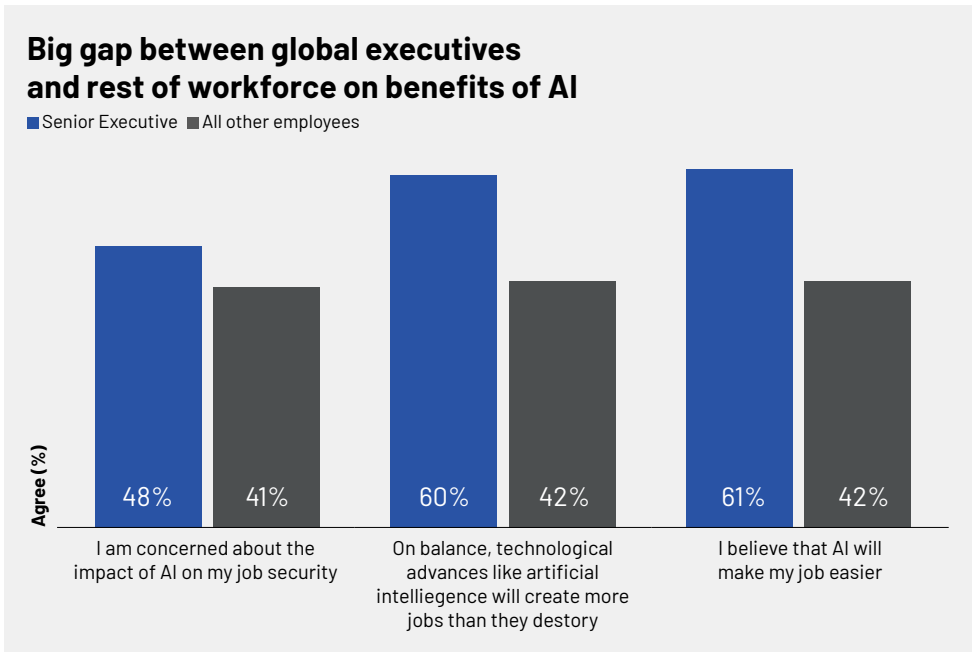
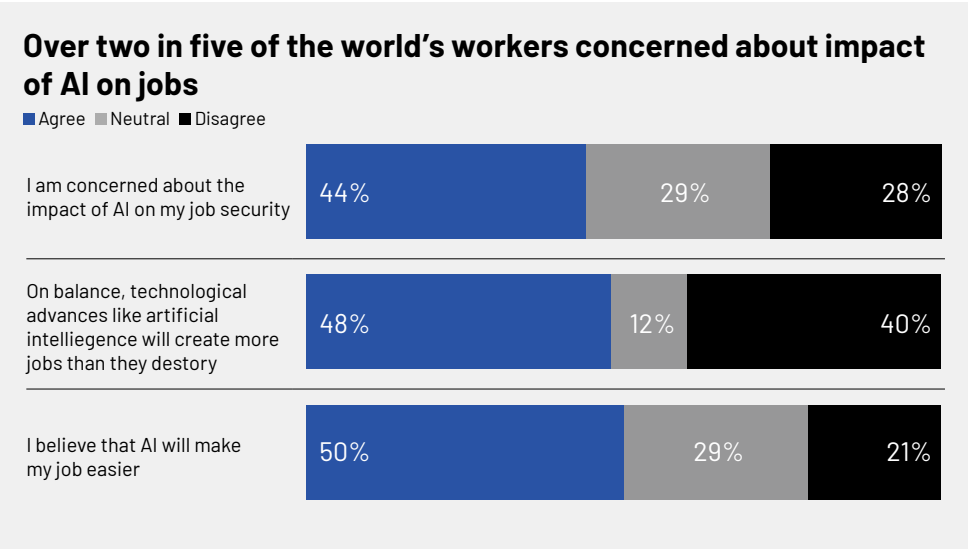
Making sure everyone has equal access and use of AI is imperative to any digital transformation.

Senior executives are more concerned about its impact on their job security, but in all reality, when it comes to job cuts, it is more likely that more junior employees will be made redundant.

On the flip side, Executives are equally more positive on its benefits; they are much more confident that it will make their job easier and will eventually lead to more jobs than it destroys.

Ipsos Karian and Box research has shown that men are more willing to try AI than women.

As such, there is a real concern that different segments of the world's workforce will not move along the AI journey at the same speed. This could mean a select few getting ahead and creating further disparity of opportunity, leading to greater entrenchment of historic discrimination in the workplace.



SAFETY IN NUMBERS?

Jobs are not the only issue; people don't trust companies to protect their personal data.

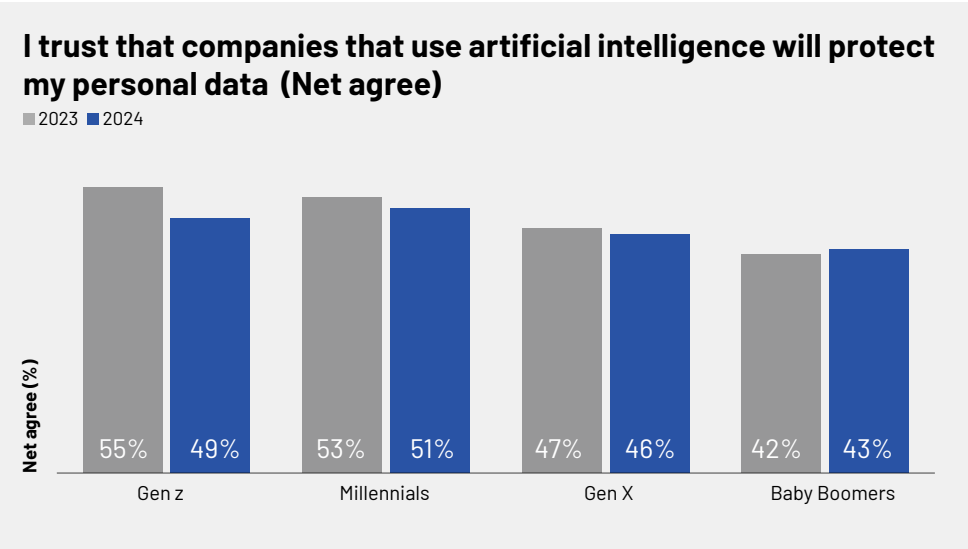
Only marginally more people trust that companies that use AI will protect their personal data. Yet there remains large differences globally, with the Global North generally remaining the most cautious here.

We've seen growing apathy towards loss of privacy online in recent years; 78% around the world say it is inevitable we will all lose some privacy in the future because of what new technology can do. But a similar amount also say they are concerned how information collected about them when they go online is being used by companies.

Businesses will clearly need to do more to demonstrate they are doing what they can to ease people's conflicted feelings here.

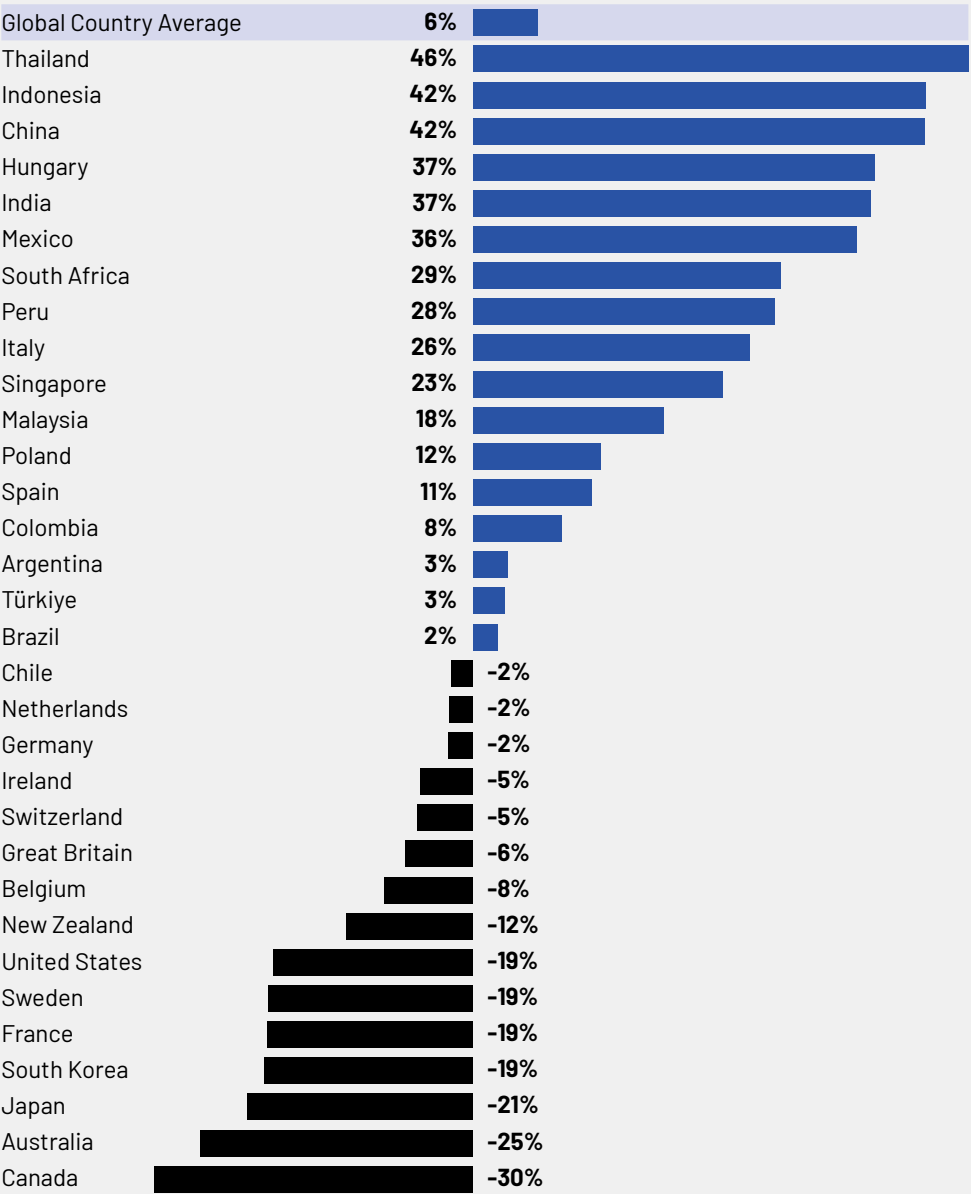
Younger generations are more trusting of companies than older age groups.

Nevertheless, Gen Z saw a decline in trust this year - a sign that even the generation who are most familiar with this technology may not just trust it blindly. Trust needs to be earned and kept.



Only marginally more people trust that companies that use AI will protect personal data

I trust that companies that use artificial intelligence will protect my personal data (Net agree)



UK DEEP DIVE: TRUST IN AI GROWING

Trust in anything is never as simple as black and white. It's all about context.

In the UK, trust in companies that use AI is slowly growing. While not a majority, 45% say they trust them just as much as other companies – a whole 10ppt more than three years ago.

But, nervousness over products and services that use AI has risen 15ppts to nearly two thirds of the public. The British public are conflicted.

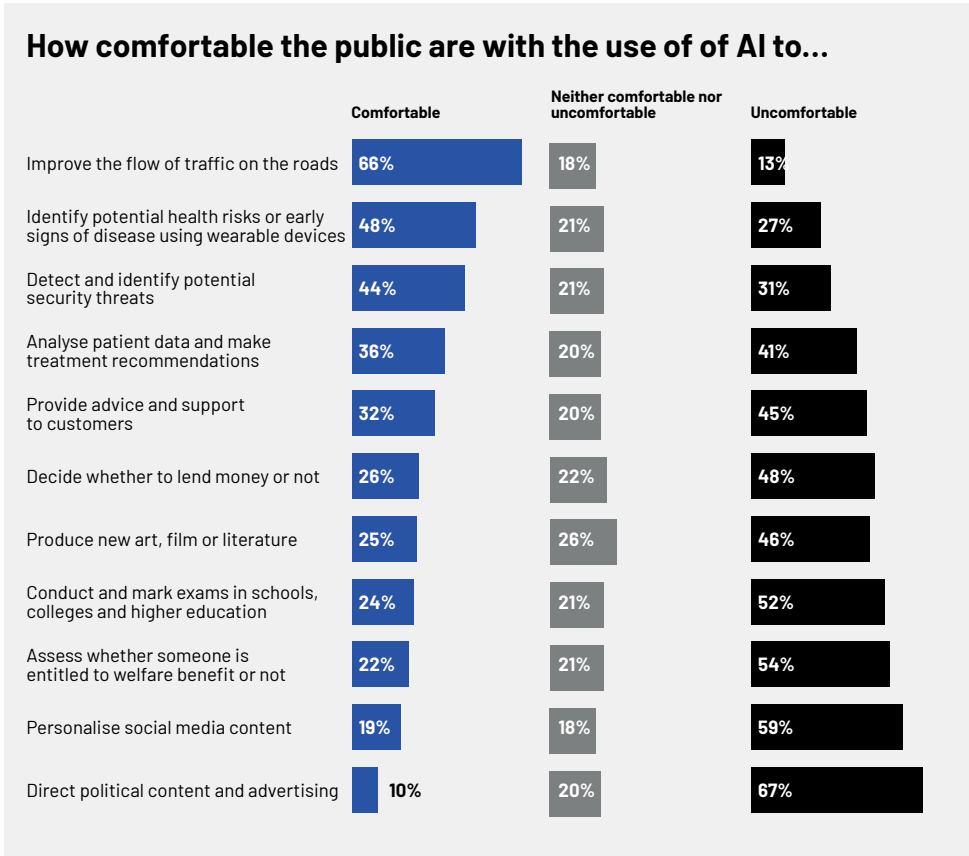
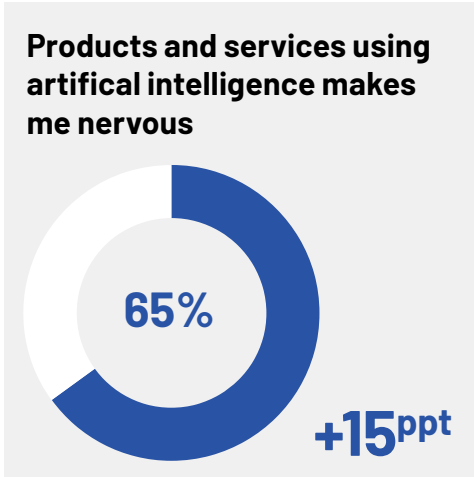
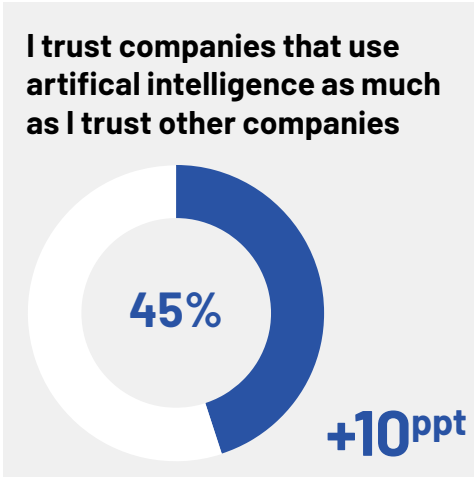
A part of this is their attitudes to how it is used. Use it to help to diagnose diseases or improve traffic flow and they are more than okay with it. Yet using it to replace human decision making and they suddenly become uneasy.

Its use in public services or political settings sees people feel particularly uncomfortable, given the impact both areas have on day to day lives.

But its use in personalising social media content is also something the British public do not feel comfortable with – a consideration more for the private sector.

Ipsos Karian and Box research into AI-supported communications at work shows a similarly conflicted picture. A third of employees would not trust communications purportedly from their CEO that were produced with AI; this drops to a quarter for formal text communications. It's all about the human touch.

Demonstrating responsible use of AI is imperative to keeping trust in any product or service.



SOURCES

* Kurt Vonnegut quote actually written by AI. We trust the new blindly at our peril.

1. Thousands of AI Authors on the Future of AI
2. Why AI Will Save the World, Marc Andreessen
3. The Bletchley Declaration
4. Ipsos Global Trends 2024
5. IC 2023 Index (slide 5 & 12)
6. World Economic Forum (slide 9)
7. The Ipsos AI Monitor 2024
8. Public Trust in AI: Implications for Policy Regulation

“
**The development
and proliferation
of AI – far from a
risk that we should
fear – is a moral
obligation that we
have to ourselves,
to our children, and
to our future.”**

Marc Andreessen

For more information:

Ghassan Karian

Chief Executive,
Ipsos Karian and Box

✉ ghassan.karian@ipsos.com

Miles Grinyer

Advisory Manager,
Ipsos Corporate Reputation

✉ miles.grinyer@ipsos.com

For more insights



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