

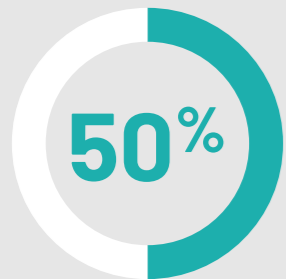
GLOBAL TRENDS

AI AT WORK



Executive Summary

1 Many are optimistic about AI making work easier, but there are concerns about job security



Key insight

believe AI will make their job easier

- Only half of employees believe AI will make their job easier, suggesting that there are still practical and communication barriers to overcome to help employees reap the benefits of AI.
- A similar proportion (44%) report concerns about AI's impact on their job security, illustrating the risk that the ongoing technology shake up could fundamentally change employment prospects.
- Developing markets exhibit both higher excitement and more concern about AI.

2 Women and younger workers more concerned about AI, but Gen Z are open to its potential



Key insight

gap in positivity towards AI between employees and senior leaders

- Senior executive populations are more positive about the benefits of AI, and less concerned about its impact on job security, possibly reflecting hopes that AI will lead to ongoing operational improvements.
- The same pattern is also seen by gender, with net optimism higher among men than women.
- With AI adoption more widespread in younger age groups, Gen Z workers are the most optimistic about its potential, but also exhibit higher concerns about its impact on their future careers.

3 Employees' experiences outside work are shaping their views of AI at work



Key insight

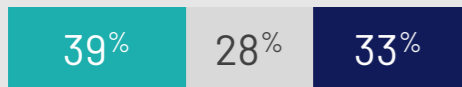
are concerned about the impact of AI on their job security

- Analysis of wider Global Trends shows clear links between wider human motivations and employee perceptions of AI. In particular, those who feel under strain at work are more worried about AI and job security.
- People with broader concerns about technology or complexity in their lives are more worried about the impact of AI on their jobs.



What you should know

- 50% of employees agree that AI will make their job easier, suggesting an ongoing need to overcome barriers to effective, efficient use of AI.
- 29% are neutral. The data doesn't tell us the reasons for neutrality, but people may feel they don't know enough about AI to decide.
- The most positive countries sit in Africa and Asia, while the least positive cluster in North America and Europe.



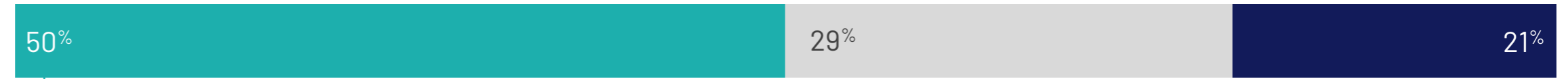
Key: ■ Positive ■ Neutral ■ Negative

- New Zealand scores 11 points below the global average in positivity towards AI and report 33% negativity – 12 points above global.

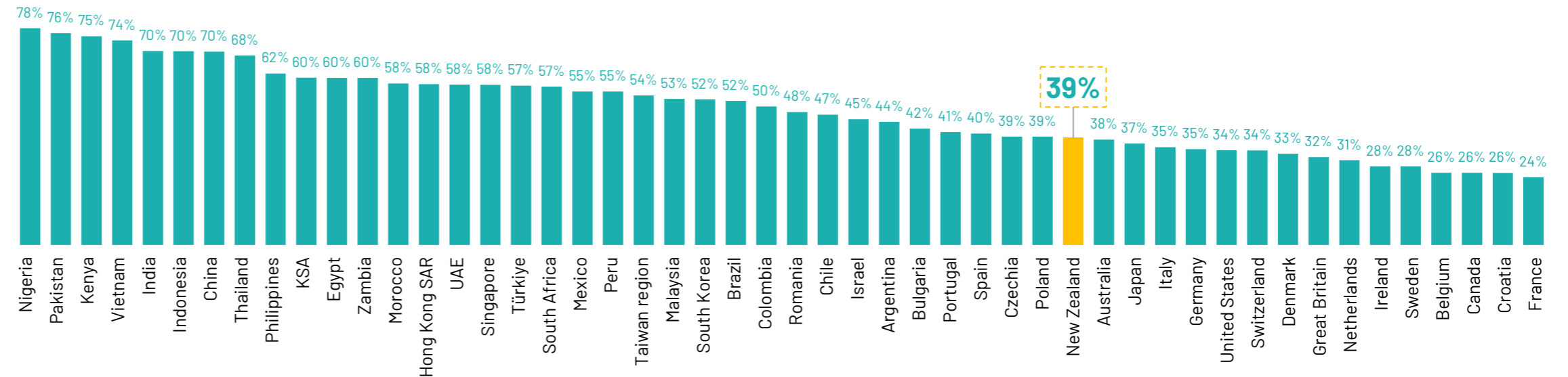
Many are optimistic about AI making work easier, with half still to be convinced

I believe that AI will make my job easier

Key: ■ Positive ■ Neutral ■ Negative



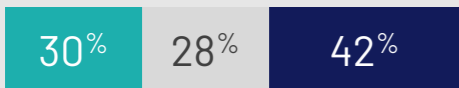
% Agree - By country





What you should know

- Globally, 44% say that they are concerned about the impact of AI on their job security. There are 12 countries where over half of employees agree.
- Broadly, the markets that are most optimistic about AI making their work easier are also most concerned about its impact on their own job security.



Key: ■ Positive ■ Neutral ■ Negative

There is significantly less concern around AI's impact of job security in New Zealand, compared to the global average.

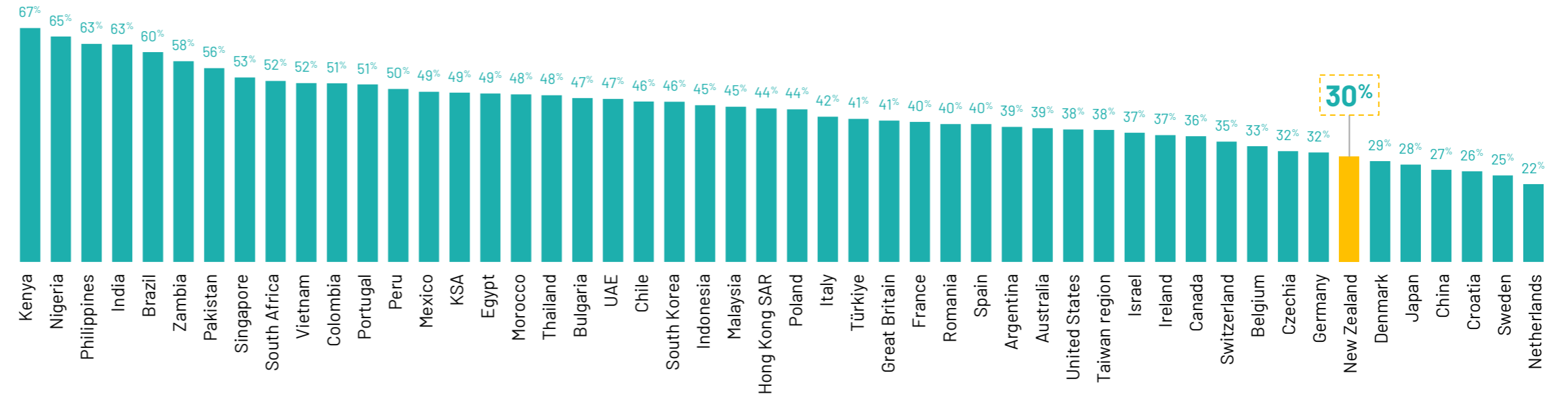
...with many employees concerned about the impact on job security

I am concerned about the impact of AI on my job security

Key: ■ Agree ■ Neutral ■ Disagree



% Agree - By country



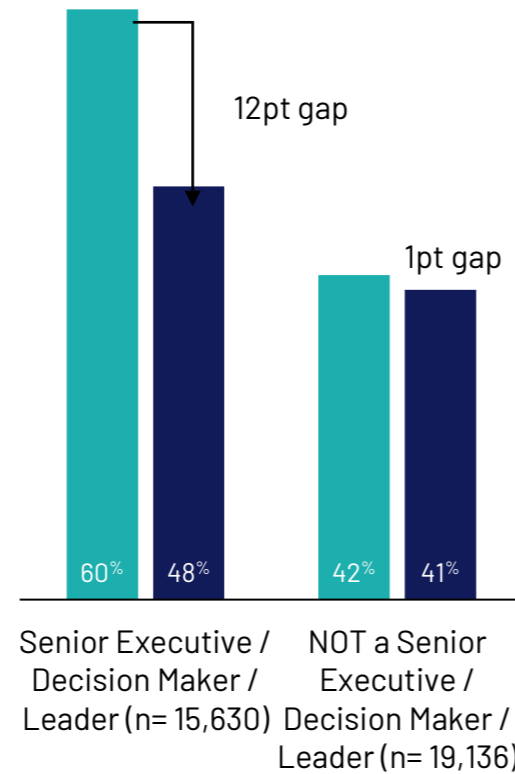


Views on AI vary by age and seniority

What you should know

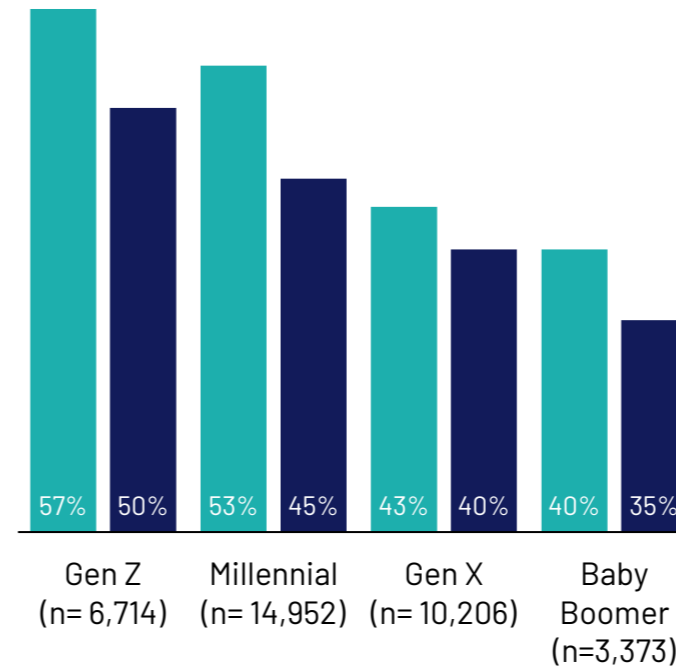
- Net optimism – the gap between positivity and concern around AI – is considerably higher in senior executive populations, perhaps reflecting the centrality AI has for ongoing operational improvements.
- The picture by generation is more nuanced. Gen Z workers are the most optimistic about AI’s potential, but also report higher concerns over its impact.

Net optimism is much higher in senior executive populations



Key: ■ AI will make my job easier (% agree)
 ■ I am concerned about the impact of AI on my job security (% agree)

While younger generations report both heightened optimism and concern

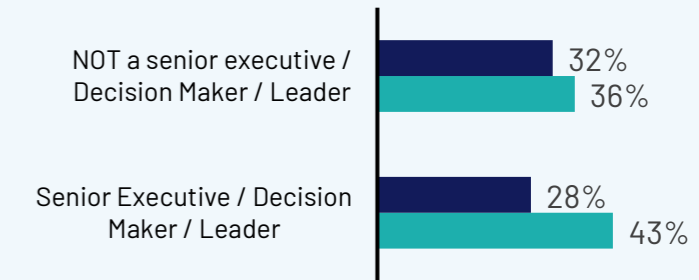


Spotlight across seniority and generations in New Zealand



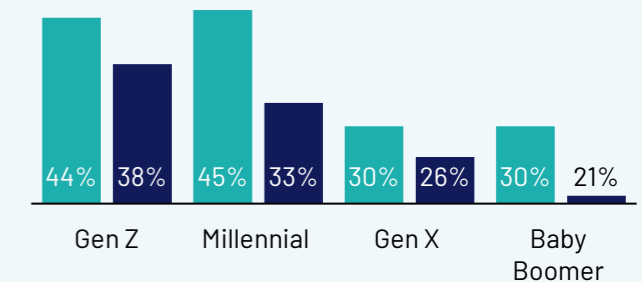
Key: ■ AI will make my job easier (% agree)
 ■ I am concerned about the impact of AI on my job security (% agree)

Senior executives and decision makers in New Zealand are significantly more confident than concerned about AI’s impact on their jobs. This gap is much less pronounced in those who are NOT decision makers, seniors or leaders. Both outlooks align with global trends.



In New Zealand, both concerns and optimism about AI making jobs easier declines in older generations, aligning with global trends.

Millennials have the largest gap between optimism and concern at 12pts., while Gen Z is most concerned about the impact of AI on job security.



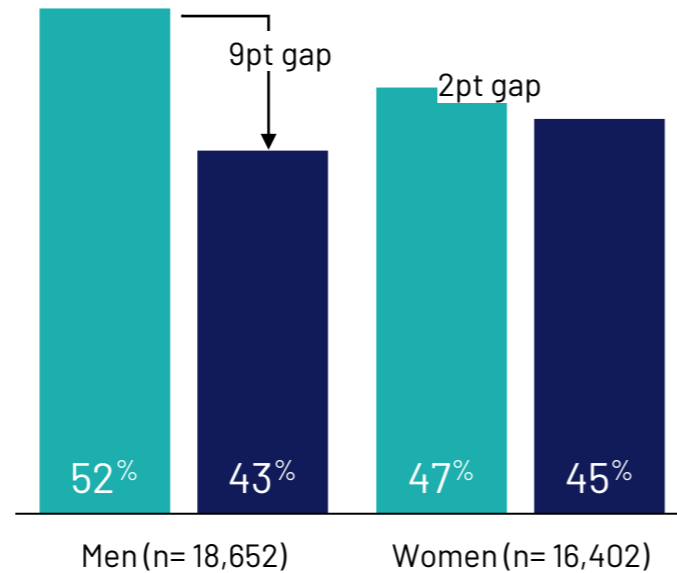


Evidence of a 'gender gap' in concerns about AI

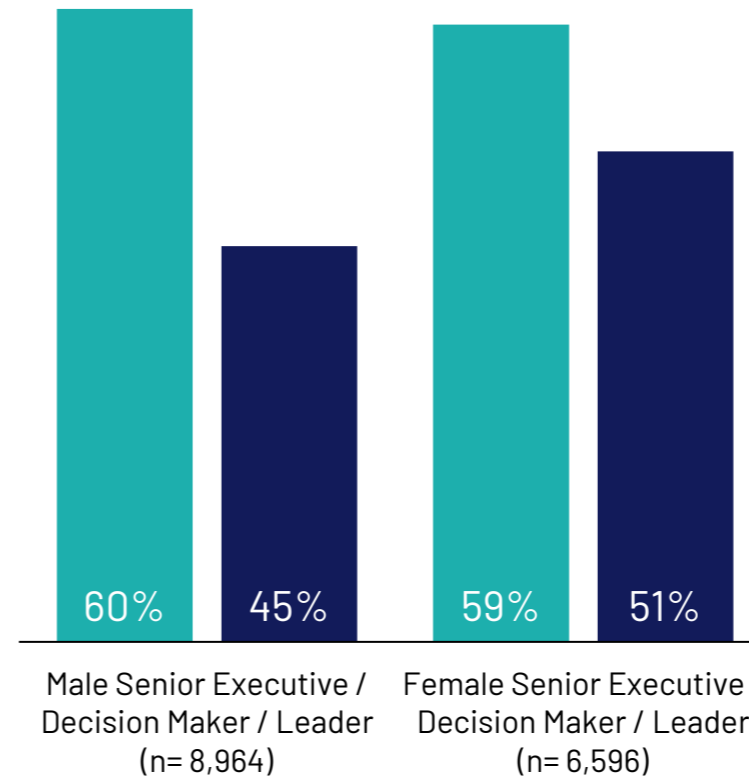
What you should know

- Net optimism is higher in men than women, where fewer than half (47%) think that AI will make their job easier.
- This gender gap is even greater in senior positions, with over half (51%) of senior women reporting concern over AI, 6pts higher than their male counterparts.

Net optimism higher for men than women



With the gender gap carried over into senior executive positions



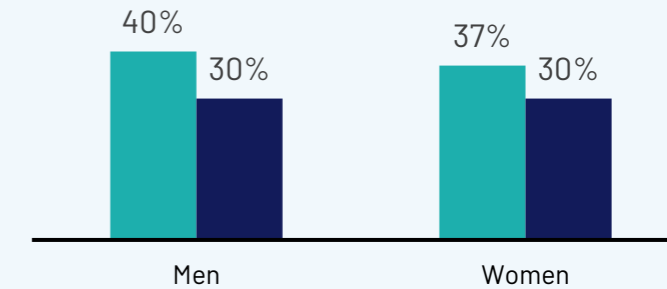
Key: ■ AI will make my job easier (% agree)
 ■ I am concerned about the impact of AI on my job security (% agree)

Spotlight on senior executives by gender and generations in New Zealand



Key: ■ AI will make my job easier (% agree)
 ■ I am concerned about the impact of AI on my job security (% agree)

While both, concerns around AI's impact on job security and optimism towards its ability to make jobs easier are expressed equally among men and women, the gap is slightly higher in men than women (10pts vs 7pts)





What you should know

- Analysis of wider Global Trends shows clear links between wider human motivations and employee perceptions of AI.
- In particular, those who feel under strain at work are more worried about AI and job security.
- People with concerns about technology and who value greater simplicity in their lives also show high concern about the impact of AI on their jobs.



Among the key drivers shaping AI perceptions, people in New Zealand are most concerned about keeping up; with 73% agreeing that *the world is changing too fast* followed by 69% being concerned by how companies use their data online.

Human motivations have an impact on workplace perceptions of AI

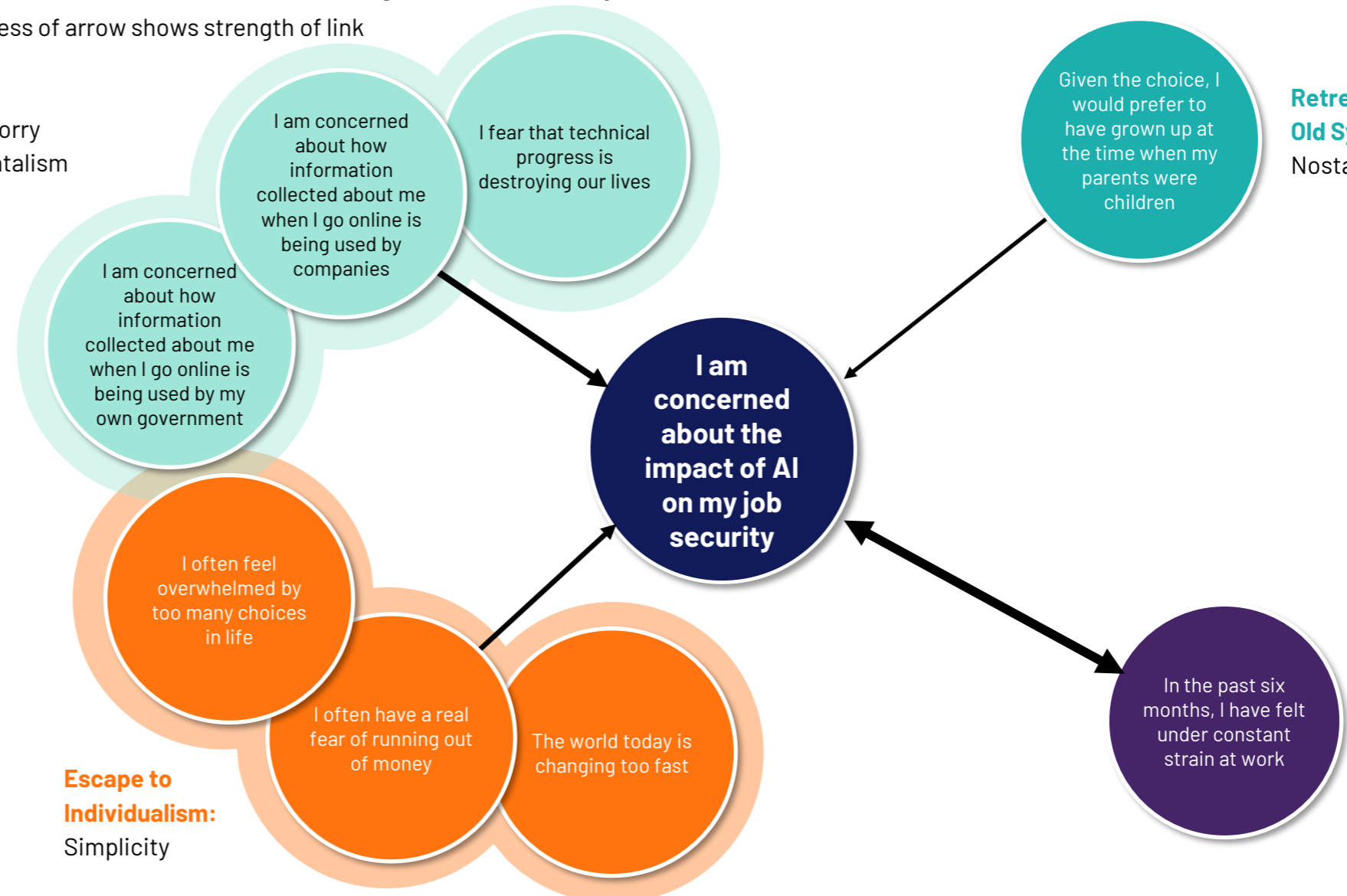
(n= 35,245)

Global Trends questions that show the strongest link to employee concerns around AI

Key: → Thickness of arrow shows strength of link

TechnoWonder:

Technological Worry
Technological Fatalism





AI at work: implications for employers

Trend

AI represents a transformational societal shift, offering the potential to augment human capabilities on a global scale.

There are still barriers to overcome; whether the potential for algorithmic bias, or ensuring that new technologies are democratised and available to all rather than concentrated in a small number of sources or benefiting only those who can afford to access them.

Tension

AI gives employees hope in the future of work and, conversely, concern about their place in it. Certain demographic groups are poised to take advantage of what AI has to offer – regionally, by age and gender. There are others who risk being left behind.

Equally, the gap in optimism between leaders and their employees requires attention. It is easy for leaders to be excited about the benefits AI promises to top and bottom line alike but, to be successful, companies need to manage its implementation in the right way.

Takeaway

Organisations should consider that employee perceptions of AI reflect their wider, human motivations. This has huge implications for adoption and change management processes.

Businesses need to move away from the desire to ‘market’ AI, towards engaging hearts and minds with the benefits, and upskilling and reskilling around technology adoption.

To neglect this course of action risks low adoption – with resulting negative ROI – or, worse, reticence in the face of an inevitable change.

Survey Methodology in detail

These are the results of a 50-market survey conducted by Ipsos on its Global Advisor online platform and in partnership with other global Ipsos teams around the world. The survey was conducted using Ipsos Online panels in all markets except for India which used its mixed-method "IndiaBus", and Zambia which used a face-to-face methodology. Ipsos interviewed a total of 50,237 adults aged 18-74 in the United States, Canada, Hong Kong SAR, Israel, Malaysia, New Zealand, South Africa, Türkiye and Vietnam; 20-74 in Thailand; 21-74 in Indonesia and Singapore; and 16-74 in all other markets between Thursday, February 15 and Wednesday, April 23, 2024.

The sample consists of c.1,000 individuals in each of Argentina, Australia, Belgium, Bulgaria, Brazil, Canada, Chile, mainland China, Colombia, Czechia, Croatia, Denmark, Egypt, France, Germany, Hong Kong SAR, India, Indonesia, Ireland, Israel, Italy, Japan, Kenya, Malaysia, Mexico, Morocco, Netherlands, New Zealand, Nigeria, Pakistan, Peru, Philippines, Poland, Portugal, Romania, KSA, Singapore, South Africa, South Korea, Spain, Sweden, Switzerland, Taiwan region, Thailand, Türkiye, United Arab Emirates, Great Britain, the

United States, Vietnam and Zambia.

The samples in Argentina, Australia, Belgium, Bulgaria, Canada, Croatia, Denmark, France, Germany, Great Britain, Ireland, Italy, Japan, the Netherlands, New Zealand, Poland, Portugal, South Korea, Spain, Sweden, Switzerland, Taiwan region, the United States and Zambia can be taken as representative of their general adult population under the age of 75.

The samples in Brazil, Chile, mainland China, Colombia, Czechia, Egypt, Hong Kong SAR, India, Indonesia, Israel, Kenya, Malaysia, Mexico, Morocco, Nigeria, Pakistan, Peru, Philippines, Romania, KSA, Singapore, South Africa, Thailand, Türkiye, the UAE, and Vietnam are more urban, more educated, and/or more affluent than the general population. The survey results for these countries should be viewed as reflecting the views of the more "connected" segment of their population.

Apart from Zambia, the data for all countries is weighted so that each market's sample composition best reflects the demographic profile of the adult population according to the most recent census data.

"The Global Market Average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.

Where results do not sum to 100 or the 'difference' appears to be +/-1 more/less than the actual, this may be due to rounding, multiple responses, or the exclusion of "don't know" or not stated responses.

The precision of Ipsos online polls is calculated using a credibility interval with a poll of 1,000 accurate to +/- 3.5 percentage points. For more information on Ipsos' use of credibility intervals, please visit the Ipsos website.

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THANK YOU

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