

GLOBAL VIEWS ON A.I. IN 2023

How people across the world feel about
artificial intelligence and expect it will
impact their life

A 31-country Global Advisor survey

July 2023

GAME CHANGERS



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Global summary findings

Understanding of AI is still lagging

- On average across the 31 countries surveyed, two-thirds say they have a good understanding of what AI is, but only half say they know what products and services use AI.
- Knowledge of which products and services use AI is higher among younger adults, men, those who are employed, more educated, and/or more affluent.
- In a typical pattern, familiarity with AI-powered products and services ranges from over 70% in Indonesia and Malaysia to just 35% in Belgium, New Zealand, and the United States.
- Reported understanding of AI has increased over the past 18 months, particularly in Europe, but familiarity with which products and services use AI has not.

Mixed feelings and increased nervousness

- Globally, only about half agree that products and services using AI have more benefits than drawbacks (54%) and are excited about them (also 54%).
- However, about the same number (52%) are nervous about them, up 13 points from 18 months ago.
- Excitement is highest in emerging markets and lowest in Europe and North America; it is also higher among Gen Zers and Millennials, as well as the college educated.
- Nervousness is highest in all predominantly Anglophone countries and lowest in Japan, Korea and Eastern Europe.

Wide geographic differences in trust

- Trust in AI varies widely by region; it is generally much higher in emerging markets and among people under 40 than in high-income countries and among Gen Xers and Boomers.
- People's trust that companies using AI will protect their personal information ranges from 72% in Thailand to just 32% in France, Japan, and the U.S.
- The percentage of people who trust that AI will not discriminate against groups of people shows an even wider spread across countries.

Just half say AI has impacted their life in the past few years...

- Globally, just half (49%) say that AI-based products and services have significantly changed their daily life in the past 3 to 5 years, about the same percentage as in December 2021.
- In South Korea and across Southeast Asia, the percentage feeling this way is about 35 to 40 percentage points higher than most countries across Northwestern Europe and North America.
- It is also, on average, at least 20 points higher among Gen Zers and Millennials than among Boomers.

... but 2 in 3 expect it will soon change it profoundly

- On average, 66% agree that AI-powered products and services will significantly change their daily life in the next 3-5 years, including majorities in all countries (from 82% in South Korea to 51% in France) and all demographic groups (but especially among the more affluent and those with a college education).
- Among workers, 57% expect AI to change the way they do their current job and 36% expect it to replace their current job.
- The percentage of workers expecting major disruptions is highest in Southeast Asia and lowest in Northern Europe (with differences of up to 50 points) and is also much higher among those who are younger and/or decision makers than among those who are not.

Not all changes are expected to be for the better

- Globally, slightly more than half expect that increased use of AI will give them more time to get things done and improve their entertainment options.
- Only 1 in 3 or slightly more say it will improve their health, their job, and their country's economy.
- More say it will make the job market worse than better.
- Again, optimism about AI is much higher in the Global South than in high-income countries, and among younger and highly educated adults than among those who are older or have no college education.

Key findings in New Zealand



Understanding of AI in New Zealand is behind the rest of the world

New Zealanders have the **lowest understanding of which types of products and services use artificial intelligence**. Just 35% of New Zealanders agree that they know which products and services use artificial intelligence, compared to 51% globally.

Despite this, **3 in 5** (62%) of New Zealanders agree that they have a **good understanding of what artificial intelligence is**. Globally, 67% of people agree they have a good understanding of artificial intelligence.

New Zealanders are more skeptical of AI than the rest of the world

New Zealanders are **more likely to feel nervous about products and services that use artificial intelligence** (63%) compared to the rest of the world (52%).

New Zealanders are less likely to trust artificial intelligence will protect their personal data and to not discriminate against people. They are also less likely to trust companies that use artificial intelligence compared to companies that do not.

The majority of New Zealanders think artificial intelligence will change their daily lives and job in the next 5 years

3 in 5 (61%) New Zealanders agree that products and services using artificial intelligence **will profoundly change their daily lives in the next 3-5 years**.

Nearly half (47%) of New Zealanders **believe it is likely that artificial intelligence will change how they do their job in the next 5 years**.

However, the majority (70%) believe it is unlikely that artificial intelligence will replace their job in the next 5 years.

New Zealanders are more likely to think that artificial intelligence will make the job market worse, instead of better in the next 3-5 years.

1

Understanding of AI



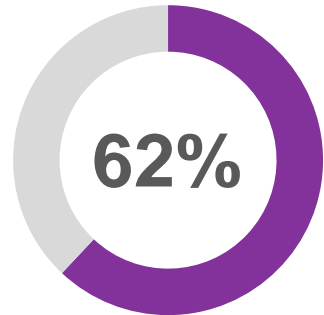


Understanding of AI

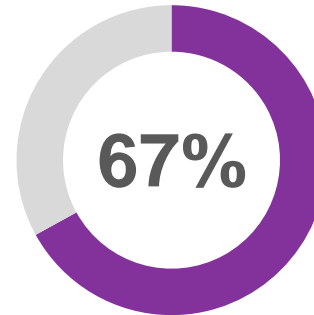
% agree (New Zealand)

Global Country Average

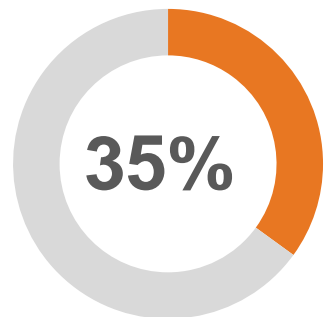
Change since Dec. 2021



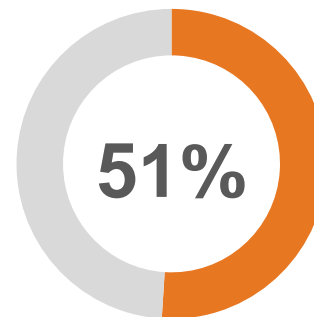
I have a good understanding of what artificial intelligence is



+3 ppt



I know which types of products and services use artificial intelligence



+1 ppt

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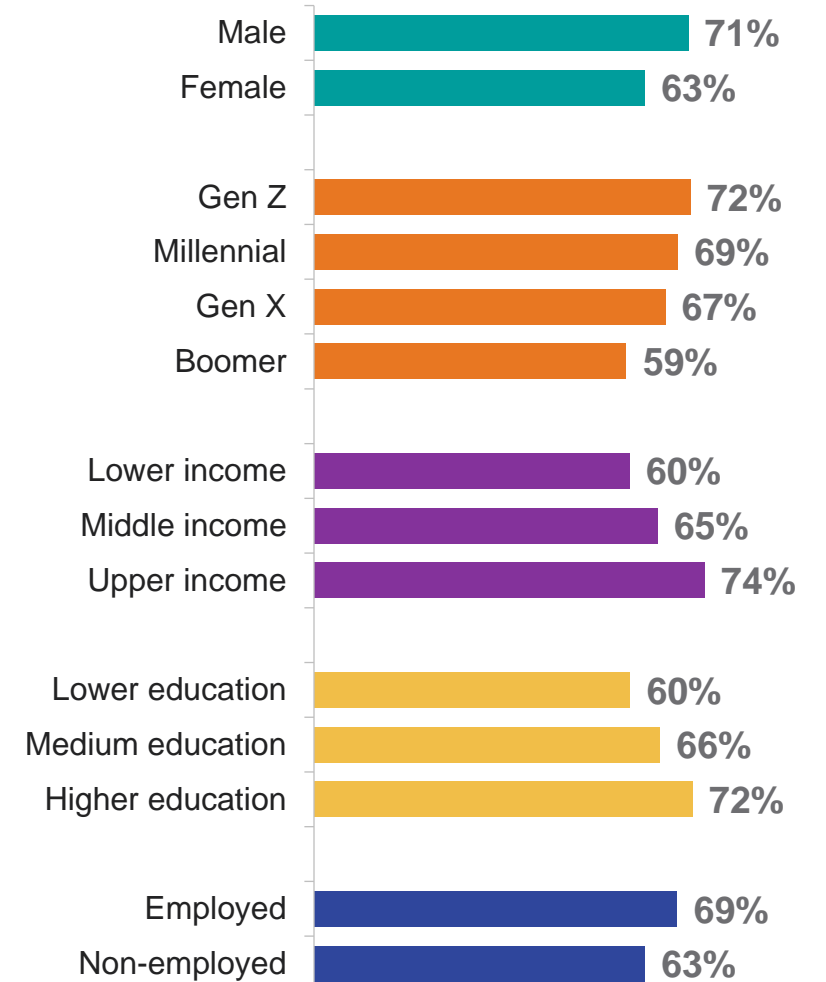
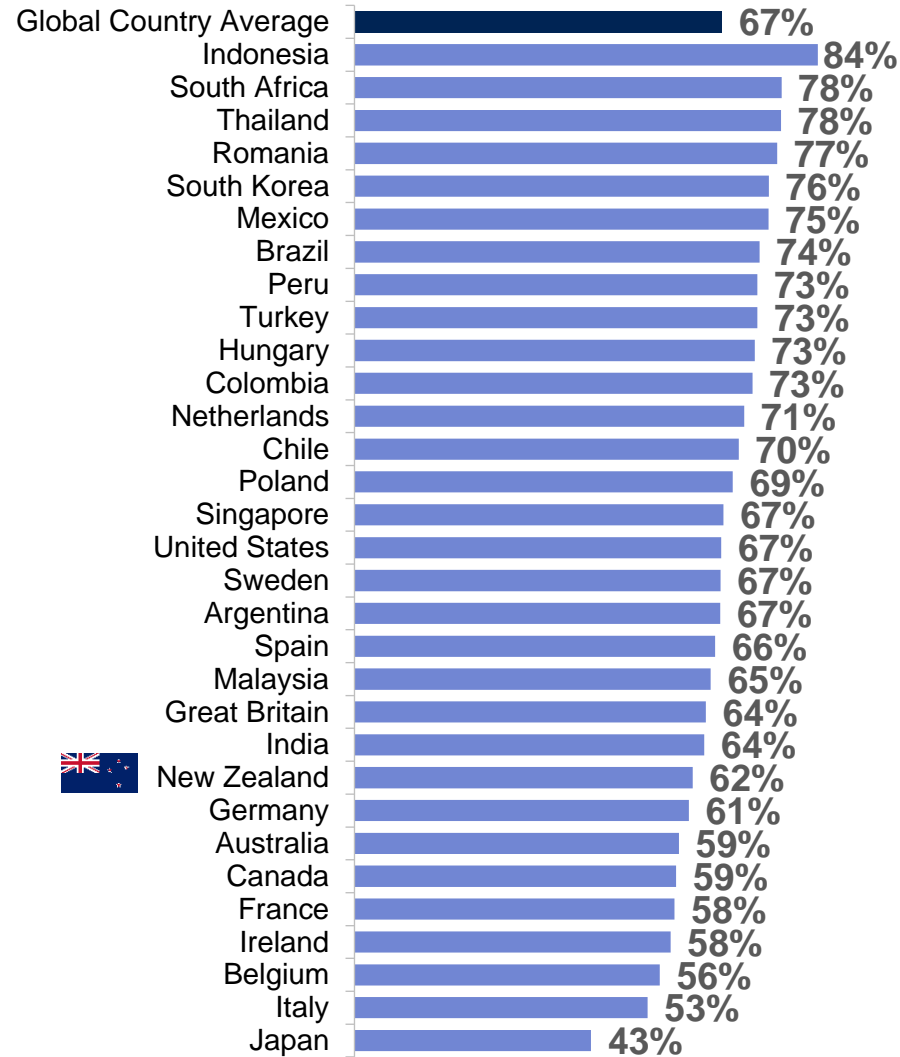
The samples in Brazil, Chile, Colombia, India, Indonesia, Ireland, Malaysia, Mexico, Peru, Romania, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population

Understanding of AI

Q. How much do you agree or disagree with the following:

I have a good understanding of what artificial intelligence is

% Agree (very/somewhat)



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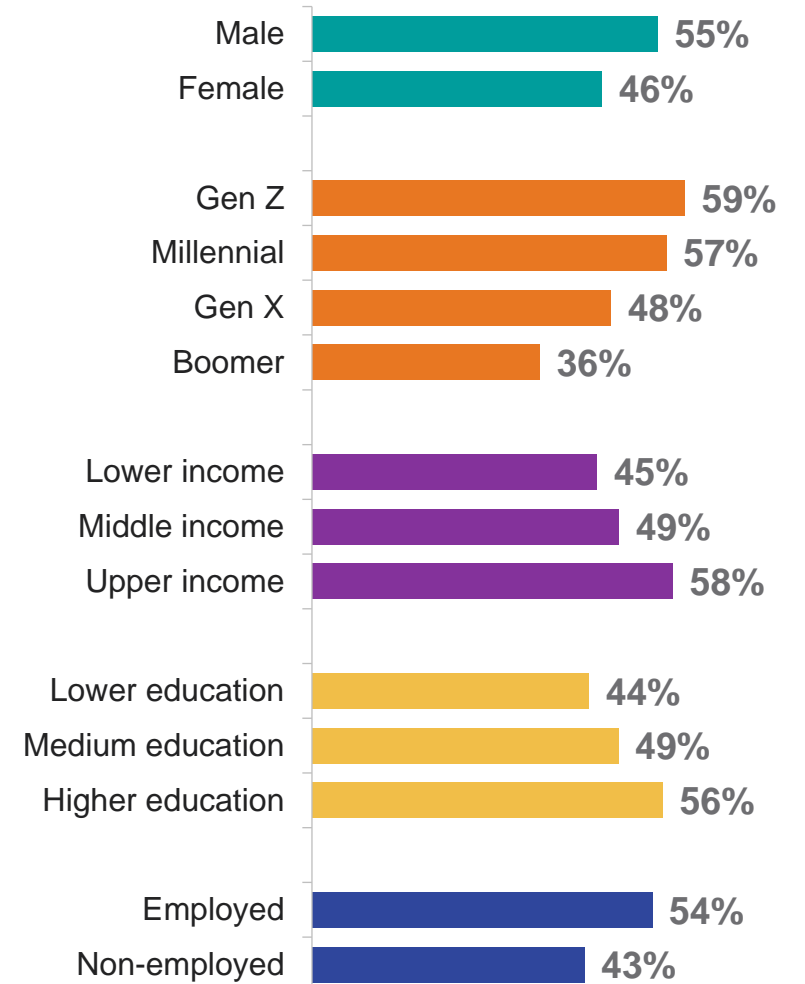
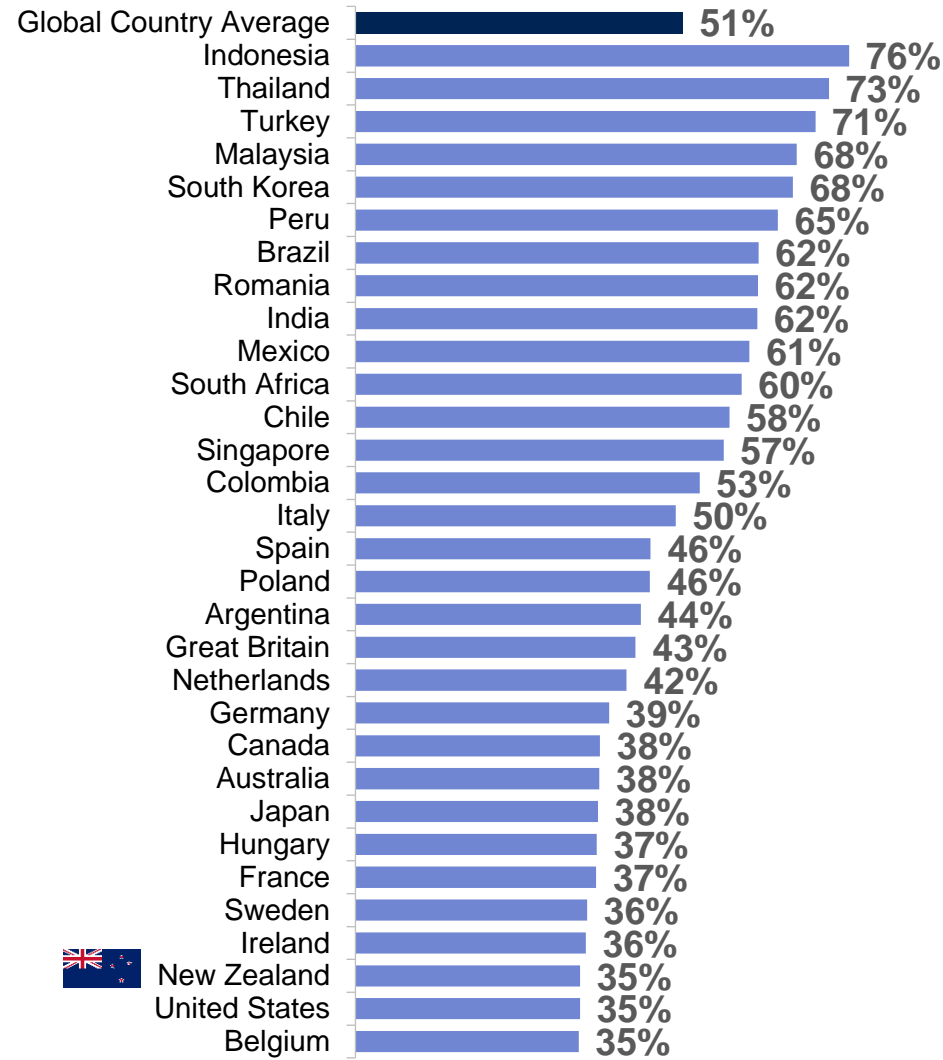
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Understanding of AI

Q. How much do you agree or disagree with the following:

I know which types of products and services use artificial intelligence

% Agree (very/somewhat)



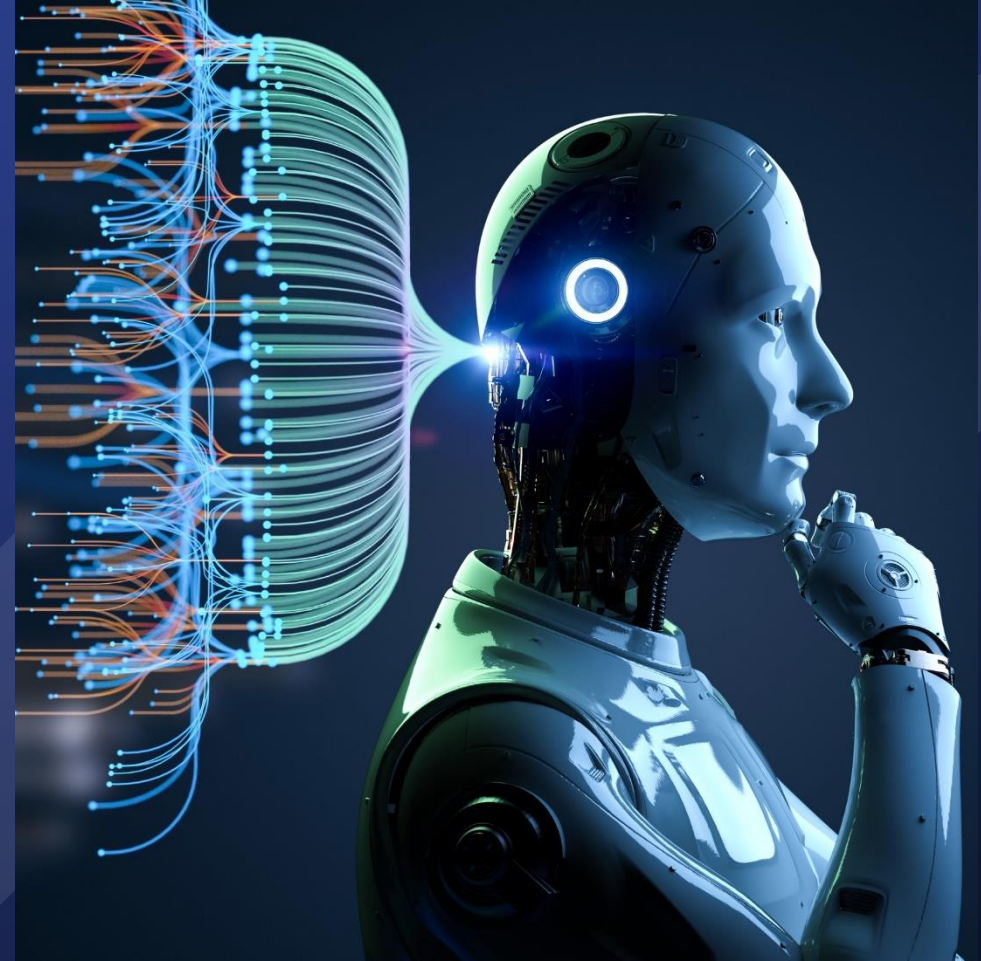
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2

Feelings about AI



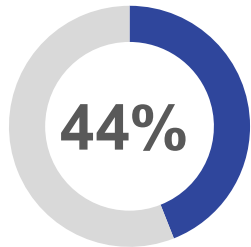


Feelings about AI

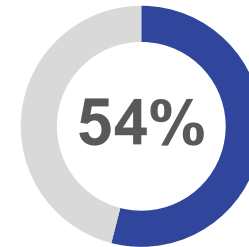
% agree (New Zealand)

Global Country Average

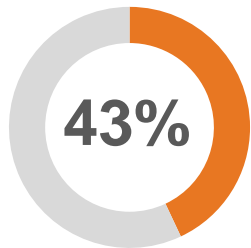
Change since Dec. 2021



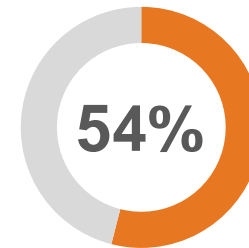
Products and services using artificial intelligence have more benefits than drawbacks



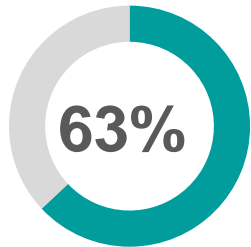
+3 ppt



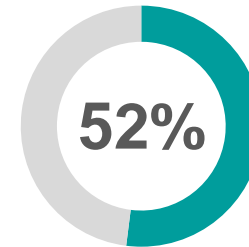
Products and services using artificial intelligence make me excited



N/A



Products and services using artificial intelligence make me nervous



+12 ppt

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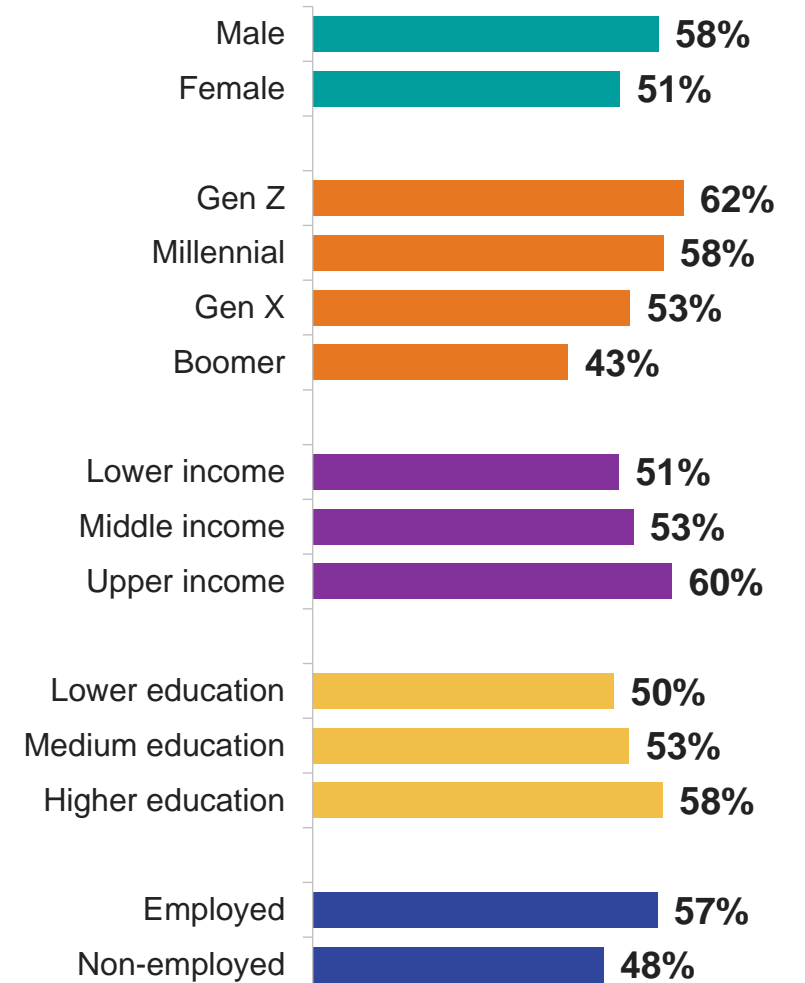
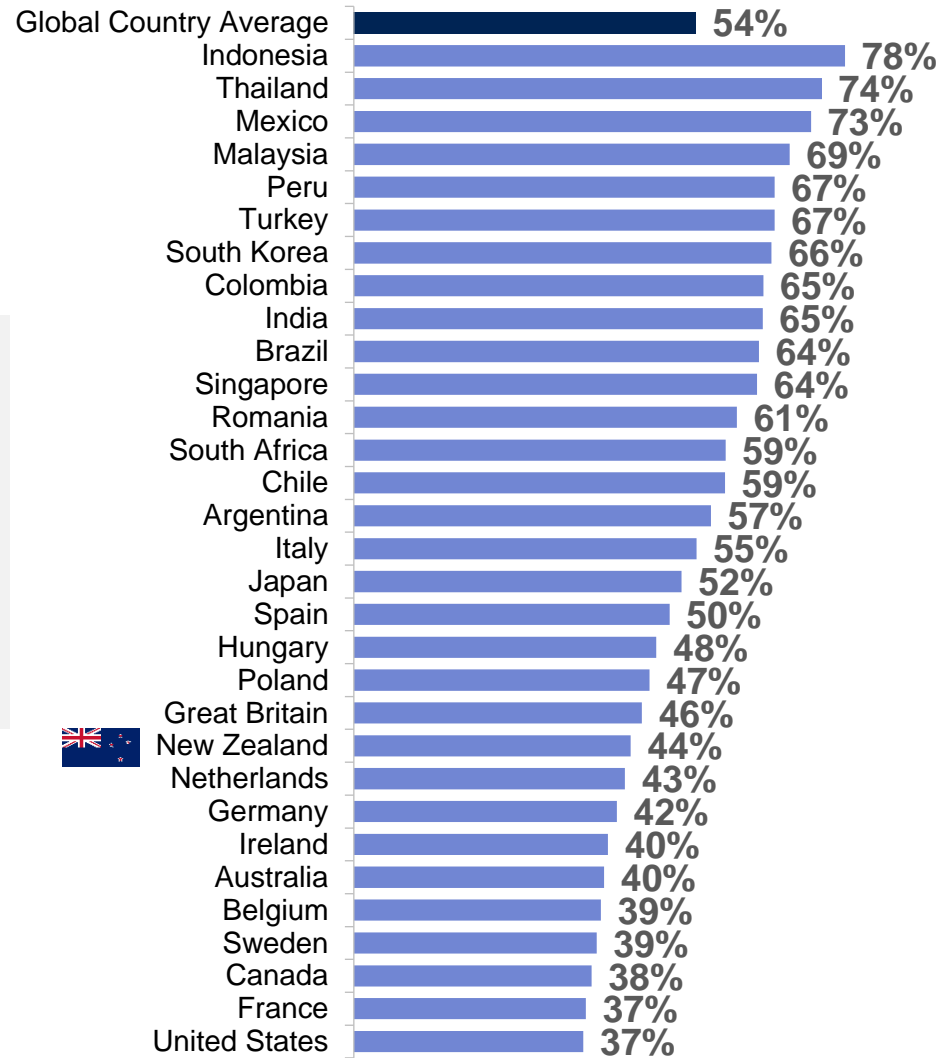
The samples in Brazil, Chile, Colombia, India, Indonesia, Ireland, Malaysia, Mexico, Peru, Romania, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population

Feelings about AI

Q. How much do you agree or disagree with the following:

Products and services using artificial intelligence have more benefits than drawbacks

% Agree (very/somewhat)



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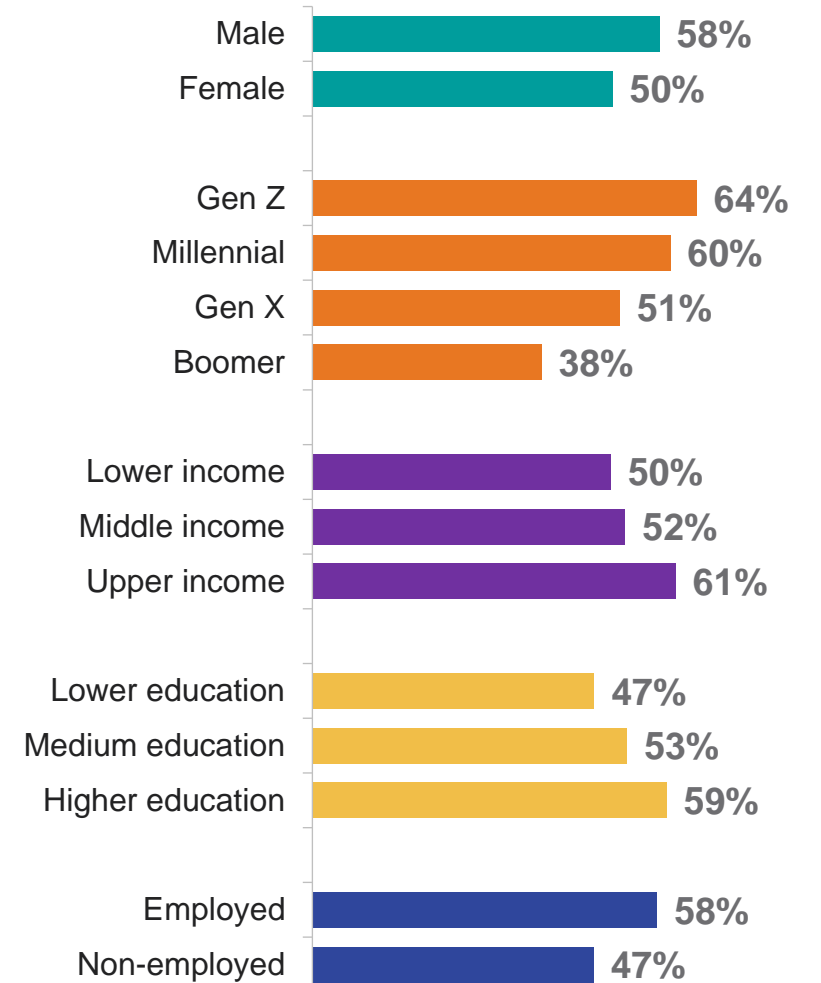
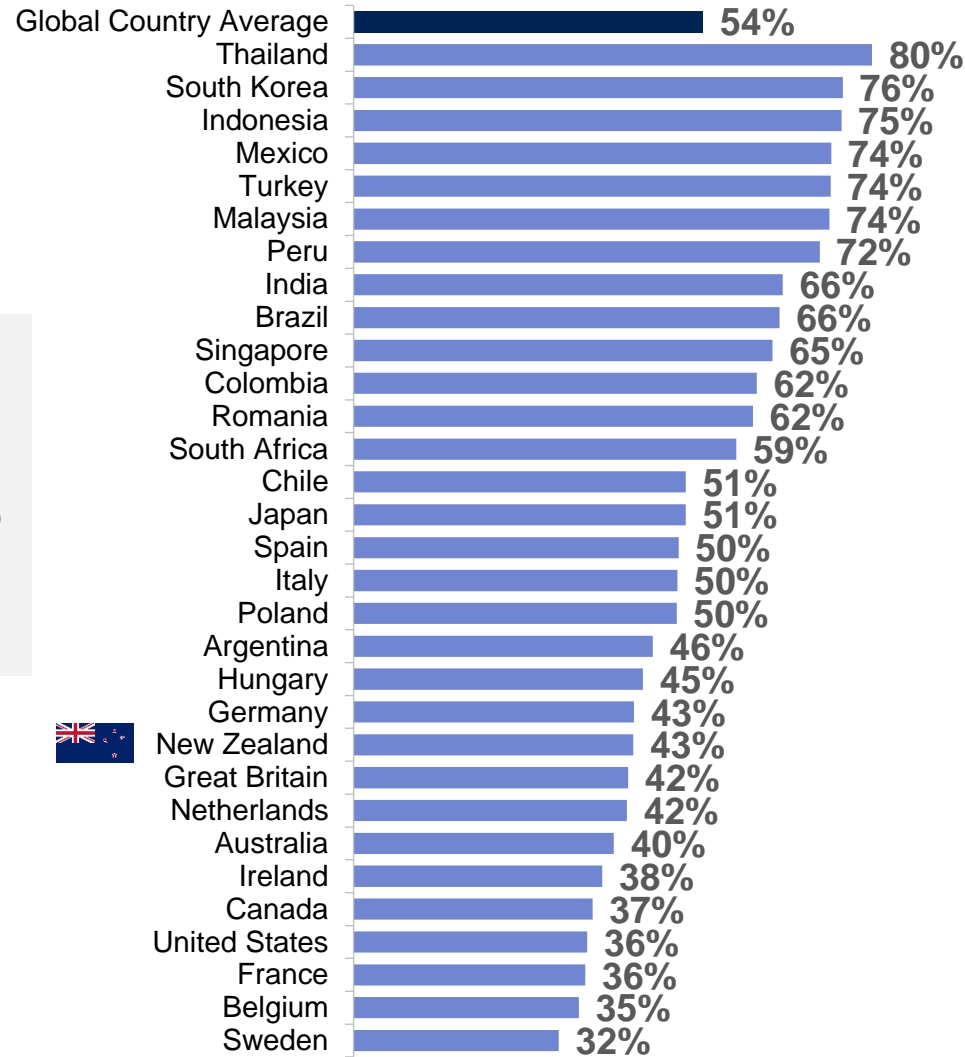
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Feelings about AI

Q. How much do you agree or disagree with the following:

Products and services using artificial intelligence make me excited

% Agree (very/somewhat)



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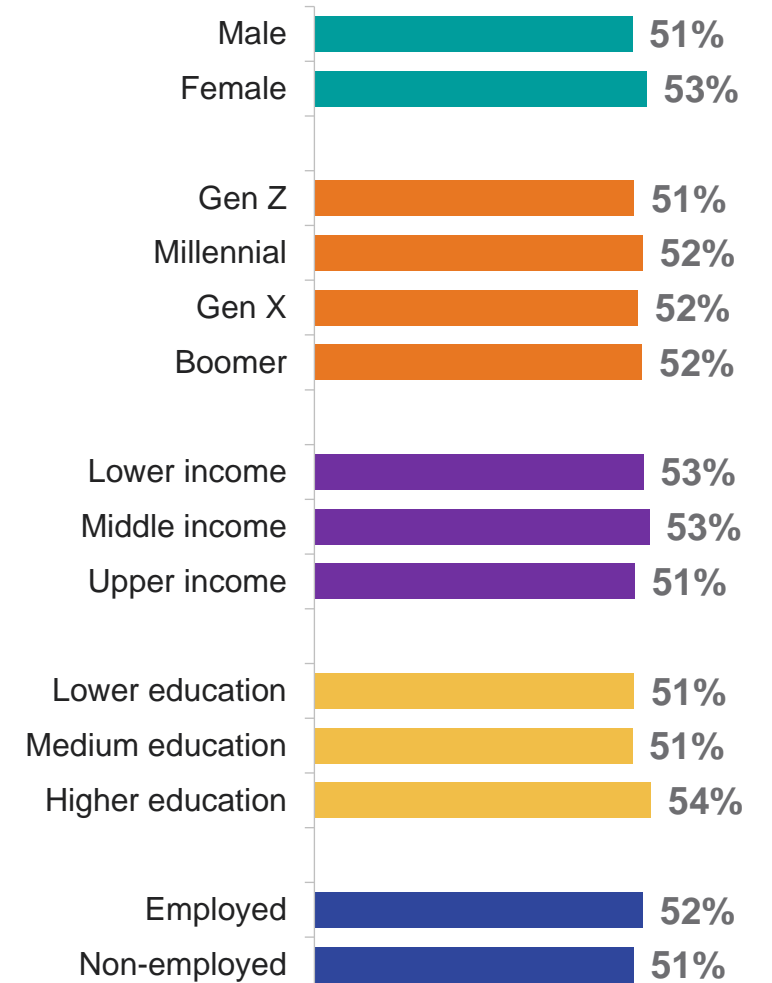
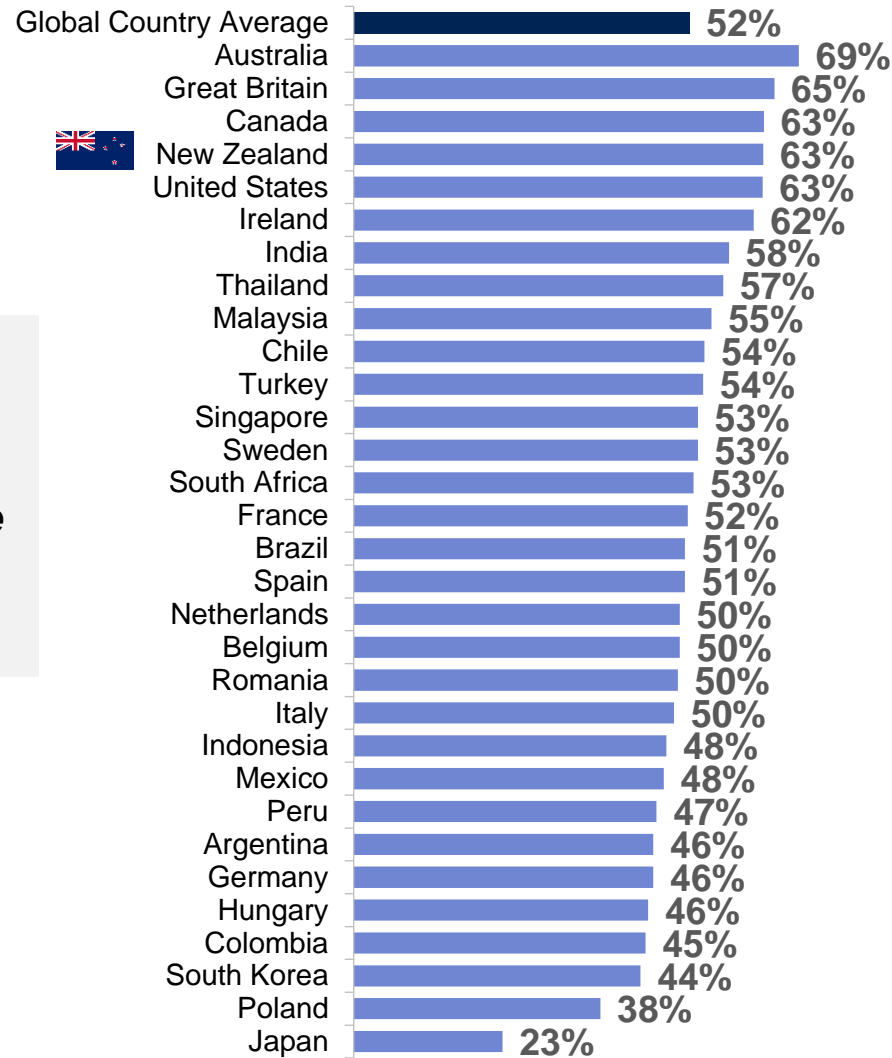
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Feelings about AI

Q. How much do you agree or disagree with the following:

Products and services using artificial intelligence make me nervous

% Agree (very/somewhat)



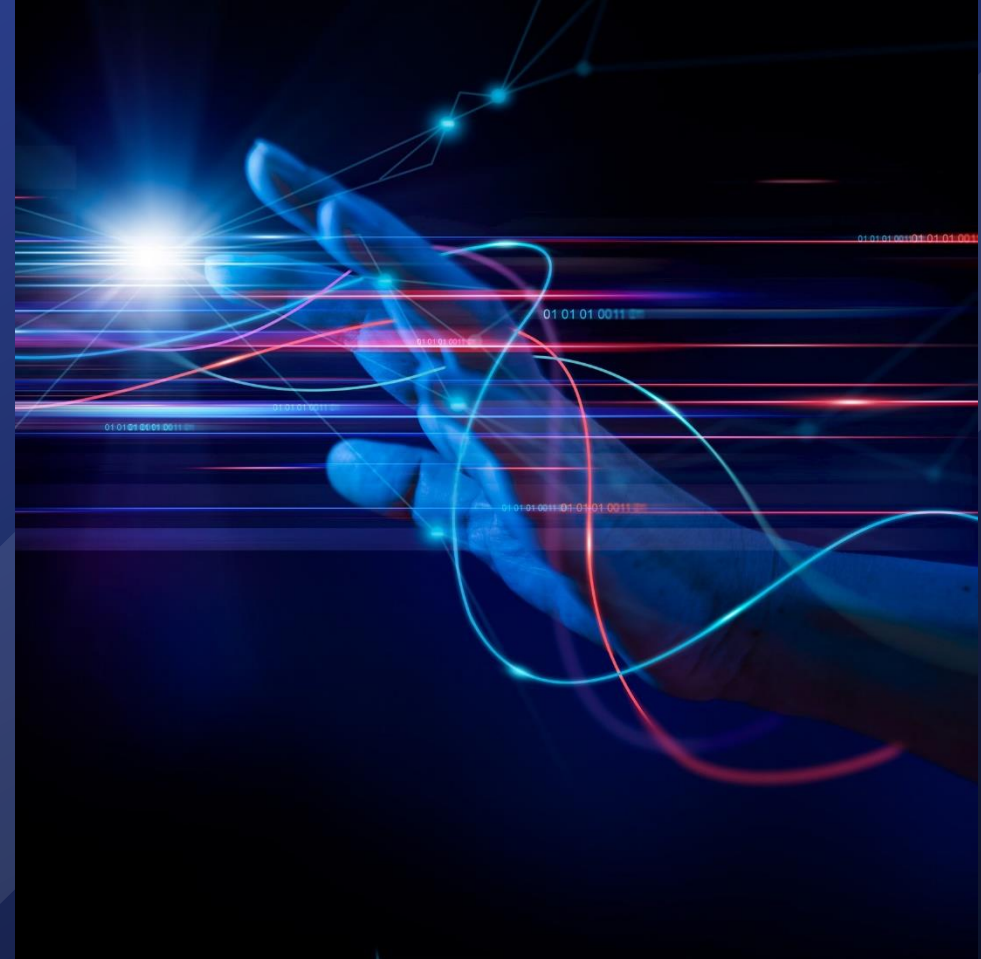
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3

Trust in AI



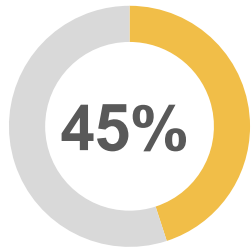


Trust in AI

% agree (New Zealand)

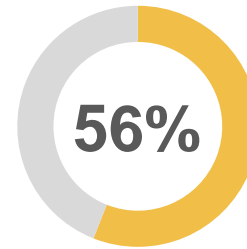
Global Country Average

Change since Dec. 2021



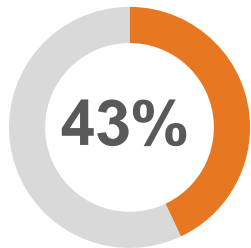
45%

I trust artificial intelligence to not discriminate or show bias towards any group of people



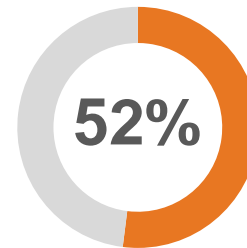
56%

N/A



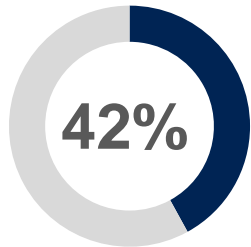
43%

I trust companies that use artificial intelligence as much as I trust other companies



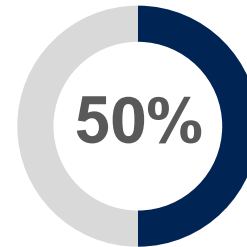
52%

+3 ppt



42%

I trust that companies that use artificial intelligence will protect my personal data



50%

N/A

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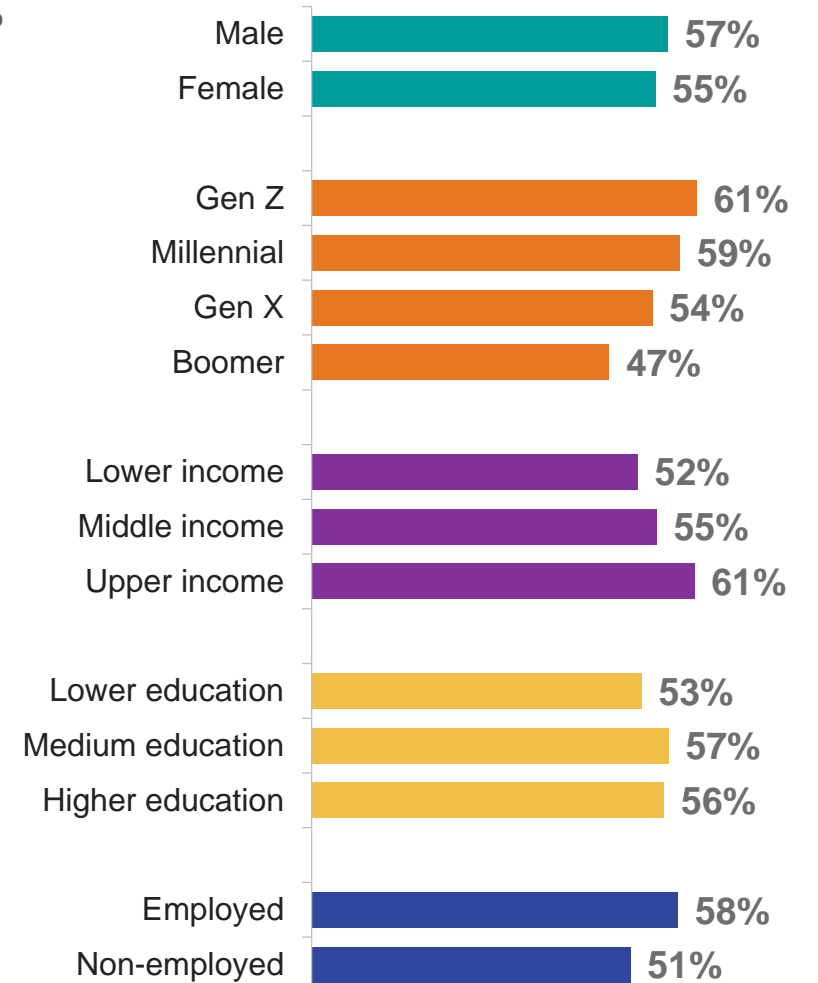
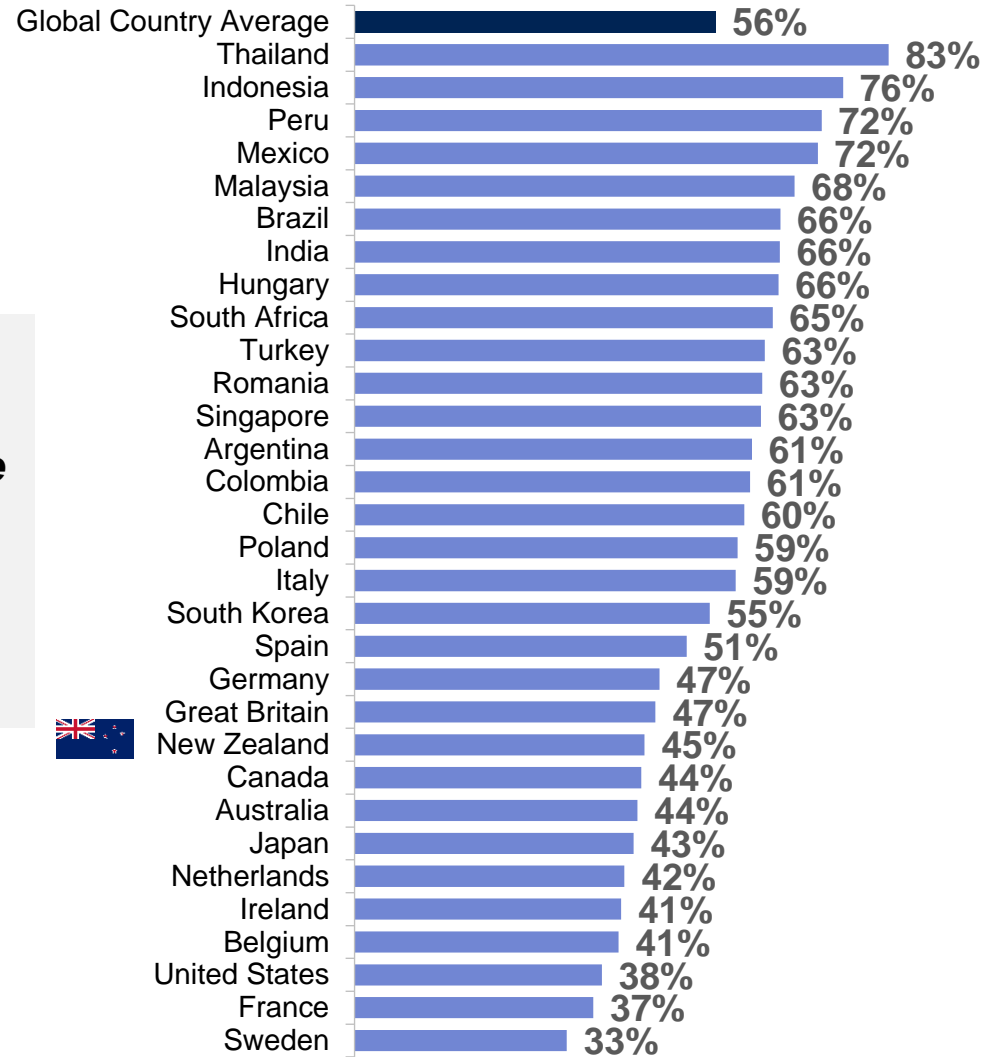
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Trust in AI

Q. How much do you agree or disagree with the following:

I trust artificial intelligence to not discriminate or show bias towards any group of people

% Agree (very/somewhat)



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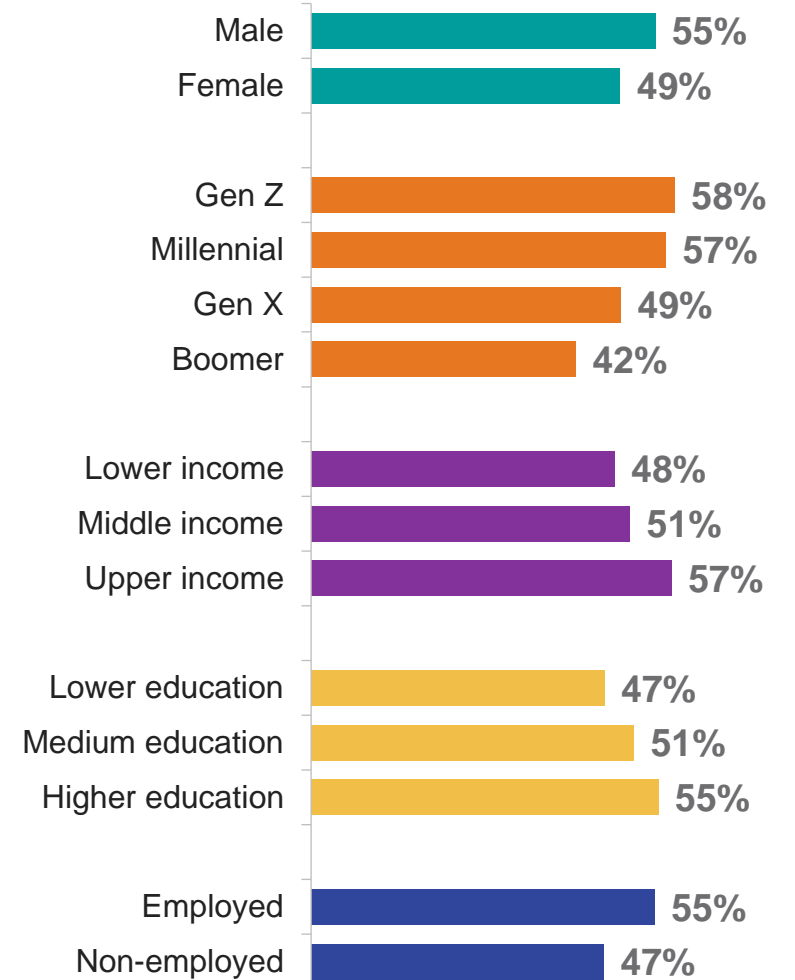
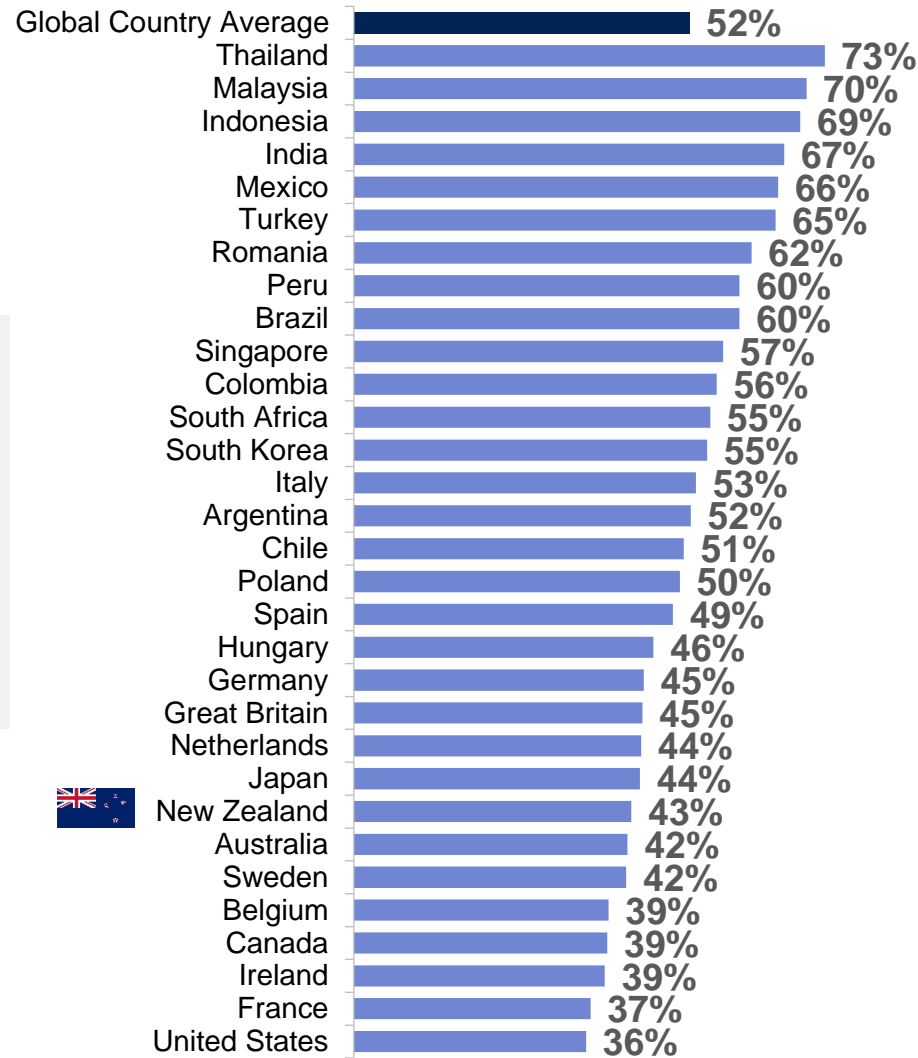
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Trust in AI

Q. How much do you agree or disagree with the following:

I trust companies that use artificial intelligence as much as I trust other companies

% Agree (very/somewhat)



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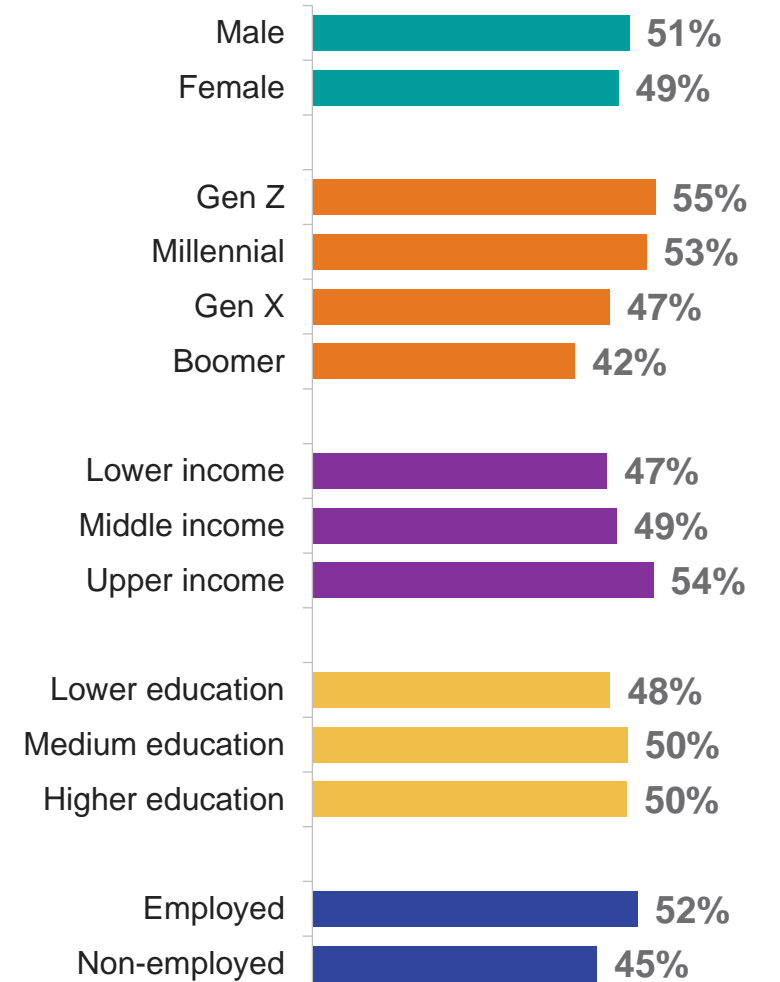
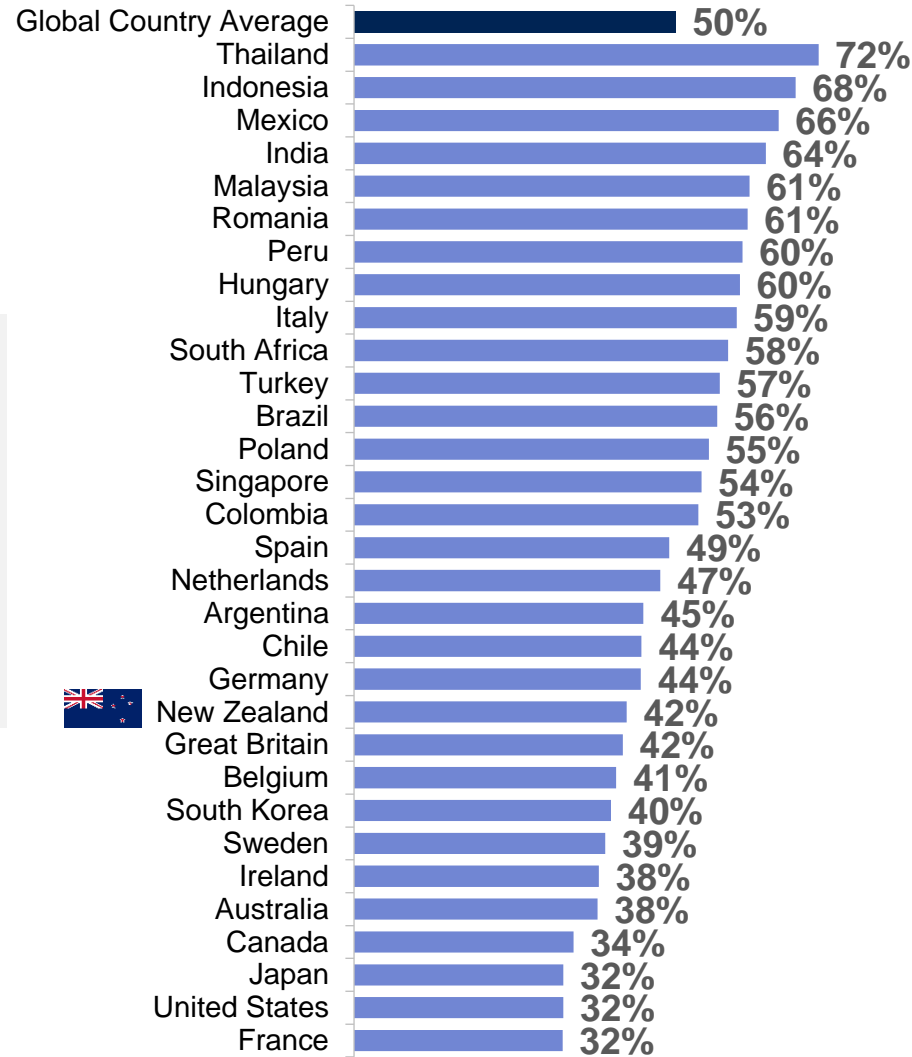
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Trust in AI

Q. How much do you agree or disagree with the following:

I trust that companies that use artificial intelligence will protect my personal data

% Agree (very/somewhat)



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4

AI impact on one's daily life and job



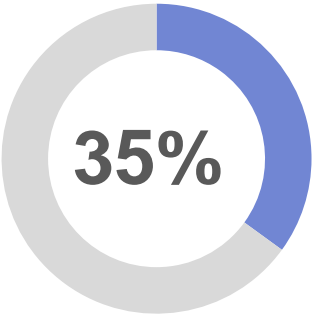


AI impact on one's daily life

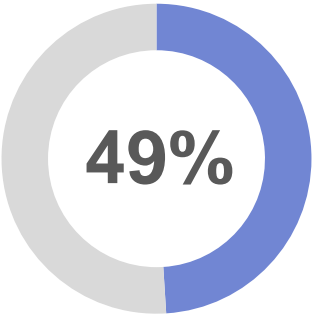
% agree (New Zealand)

Global Country Average

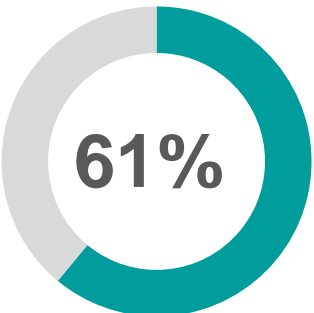
Change since Dec. 2021



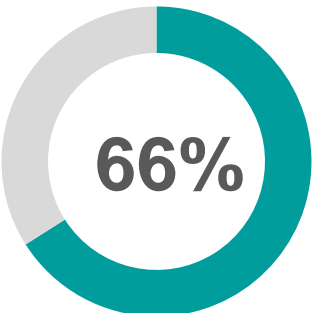
Products and services using artificial intelligence **have** profoundly **changed** my daily life in the **past** 3-5 years



+1 ppt



Products and services using artificial intelligence **will** profoundly **change** my daily life in the **next** 3-5 years



+7 ppt

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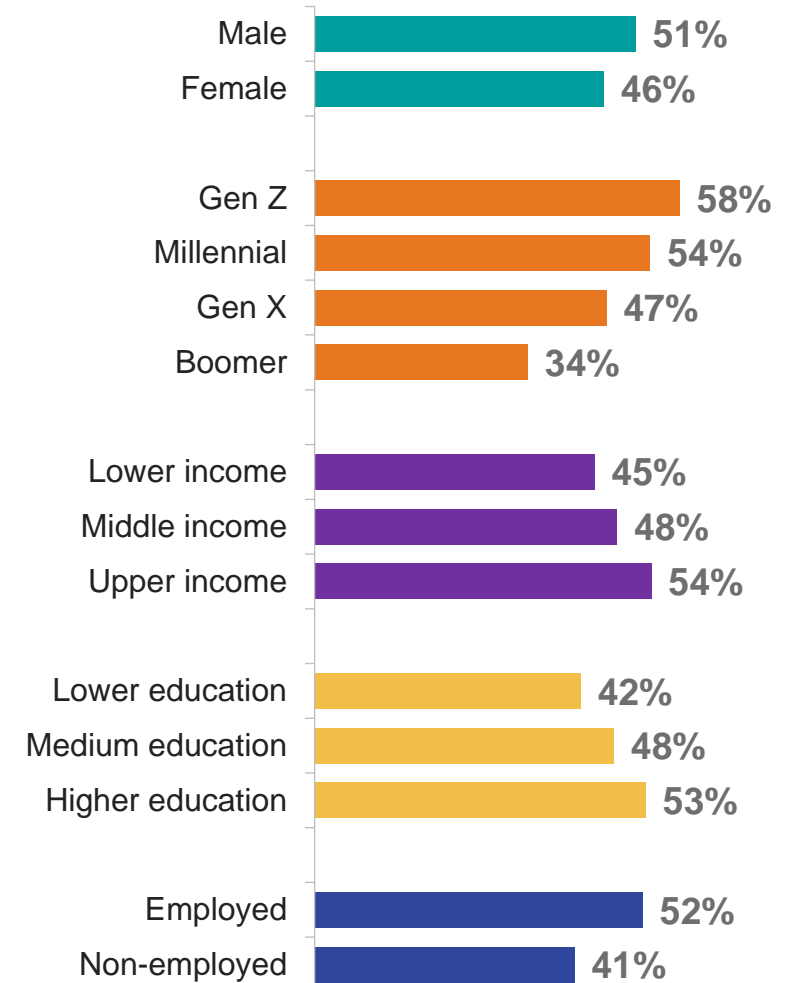
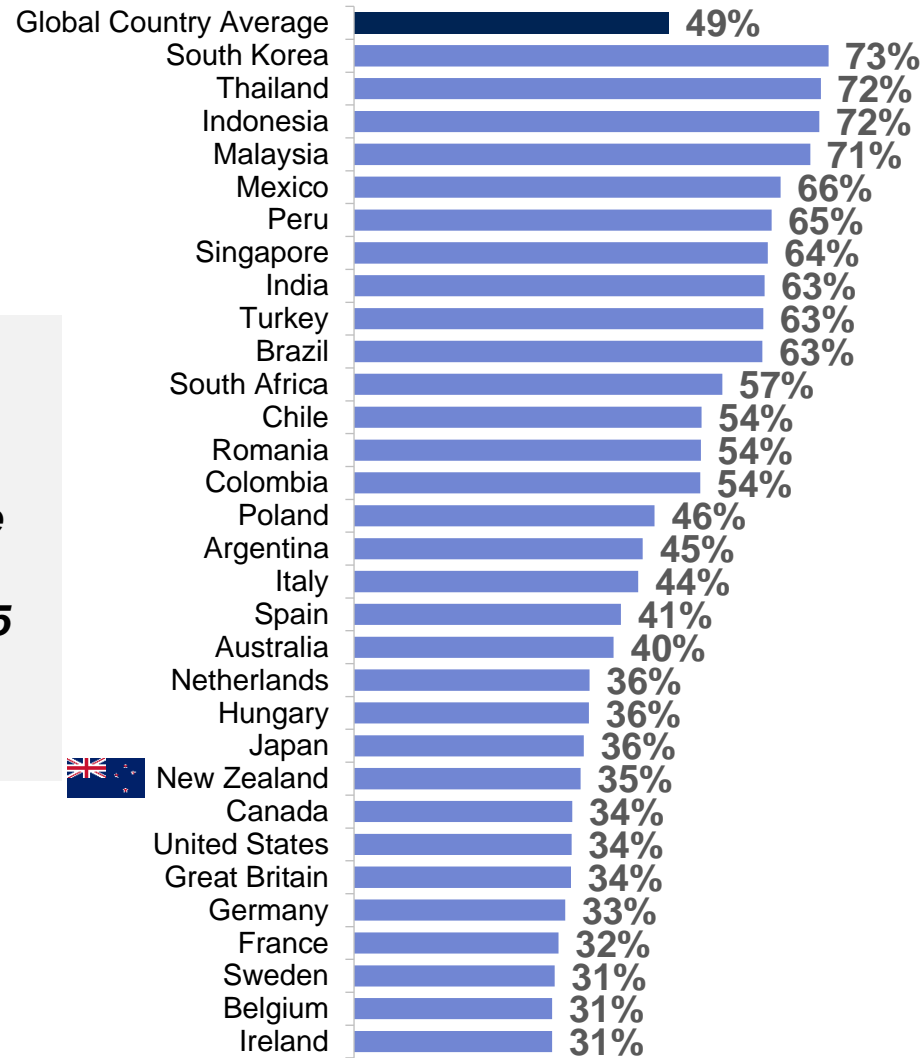


Past impact of AI

Q. How much do you agree or disagree with the following:

Products and services using artificial intelligence have profoundly changed my daily life in the past 3-5 years

% Agree (very/somewhat)



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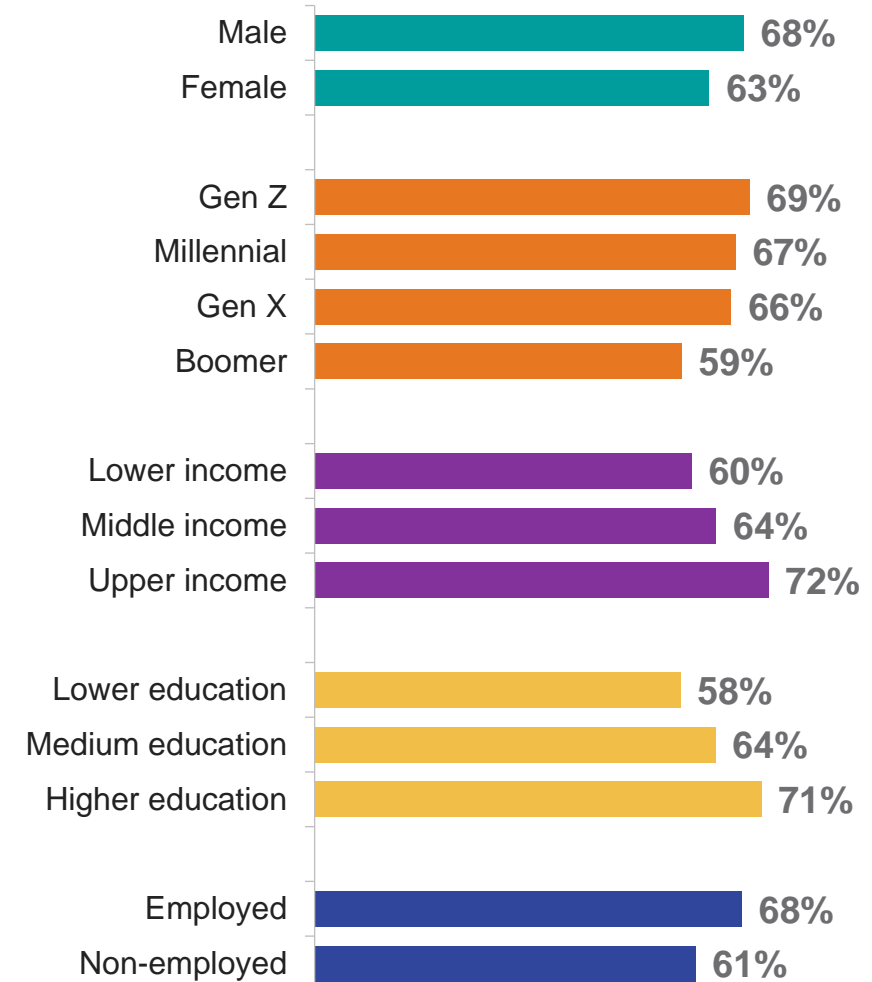
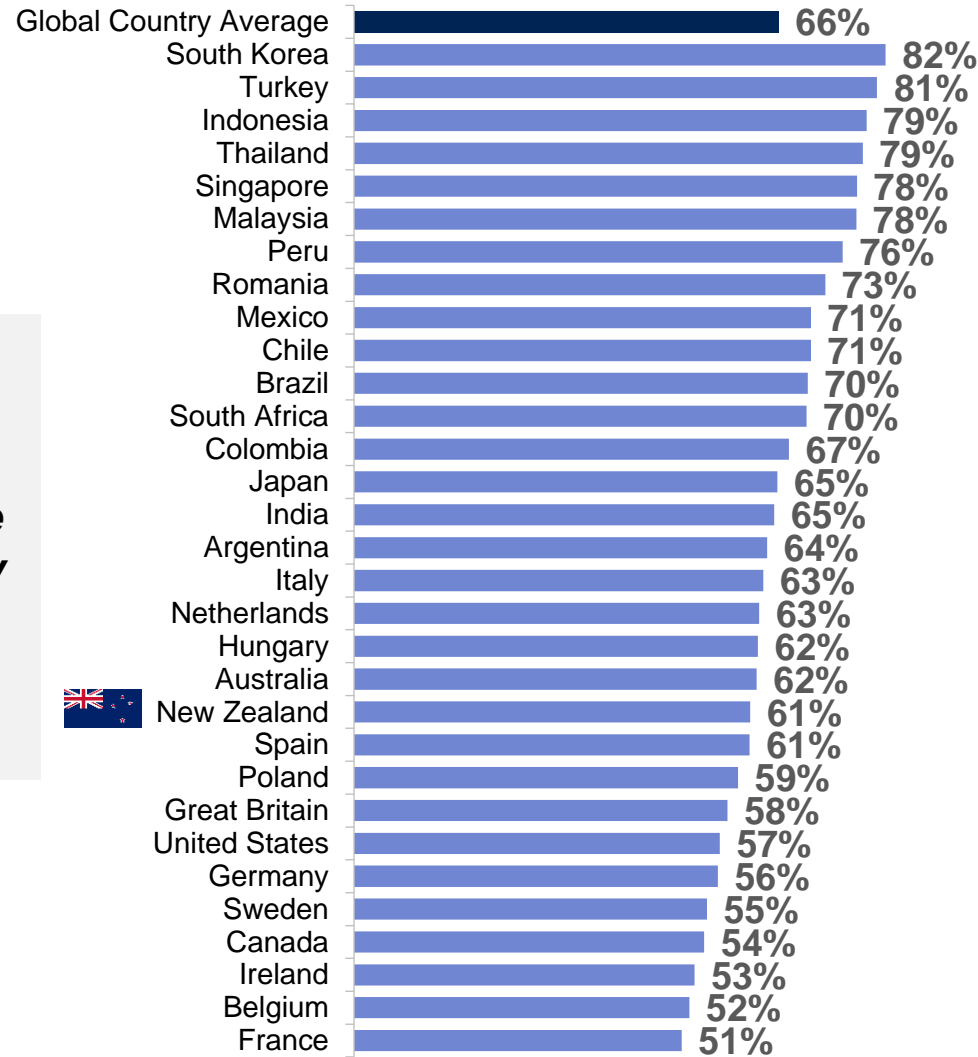
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Future impact of AI

Q. How much do you agree or disagree with the following:

Products and services using artificial intelligence will profoundly change my daily life in the next 3-5 years

% Agree (very/somewhat)



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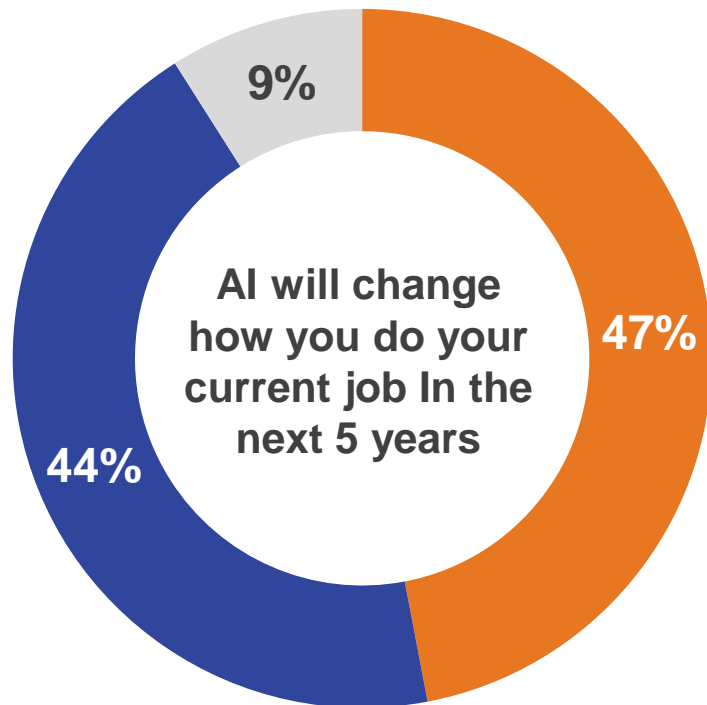
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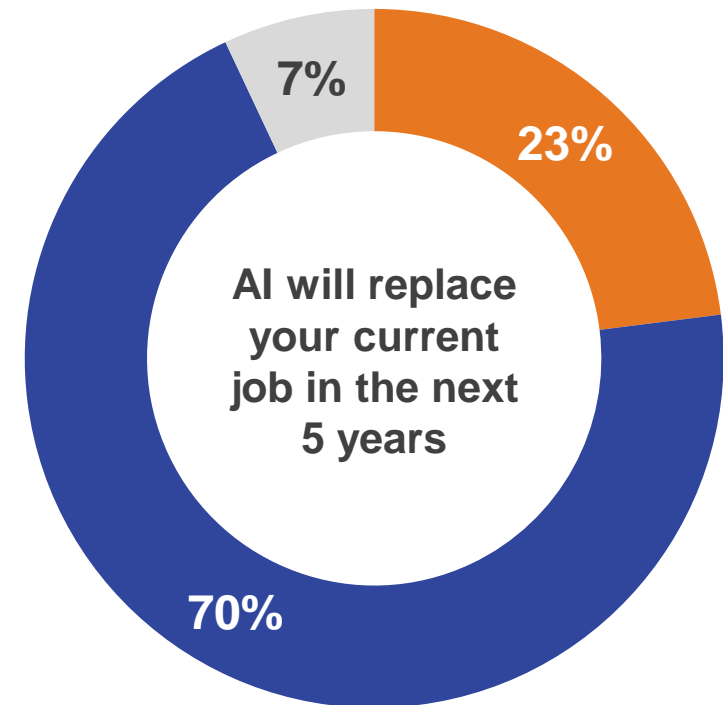


Impact of AI on Current Job

Q. How likely, if at all, do you think it is that... (New Zealand)



- Not Likely
- Likely
- Don't know



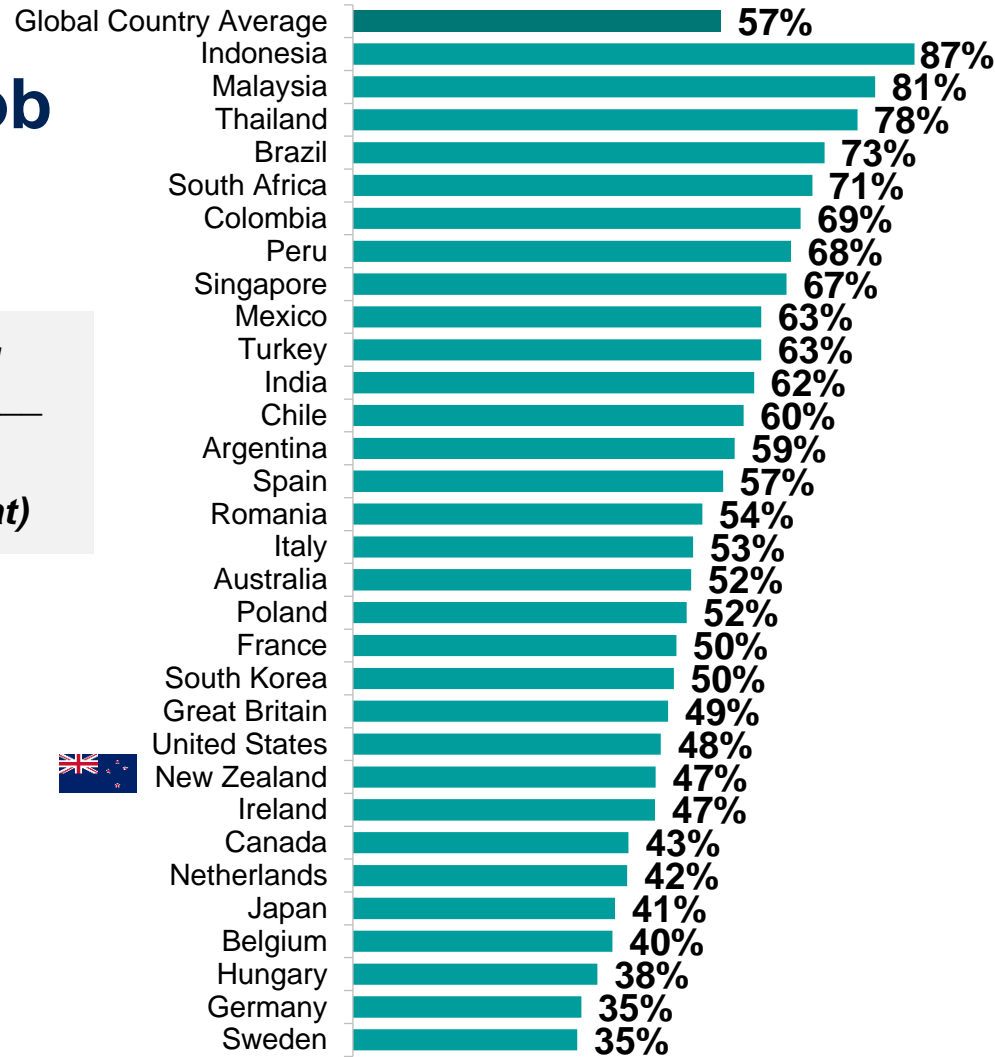
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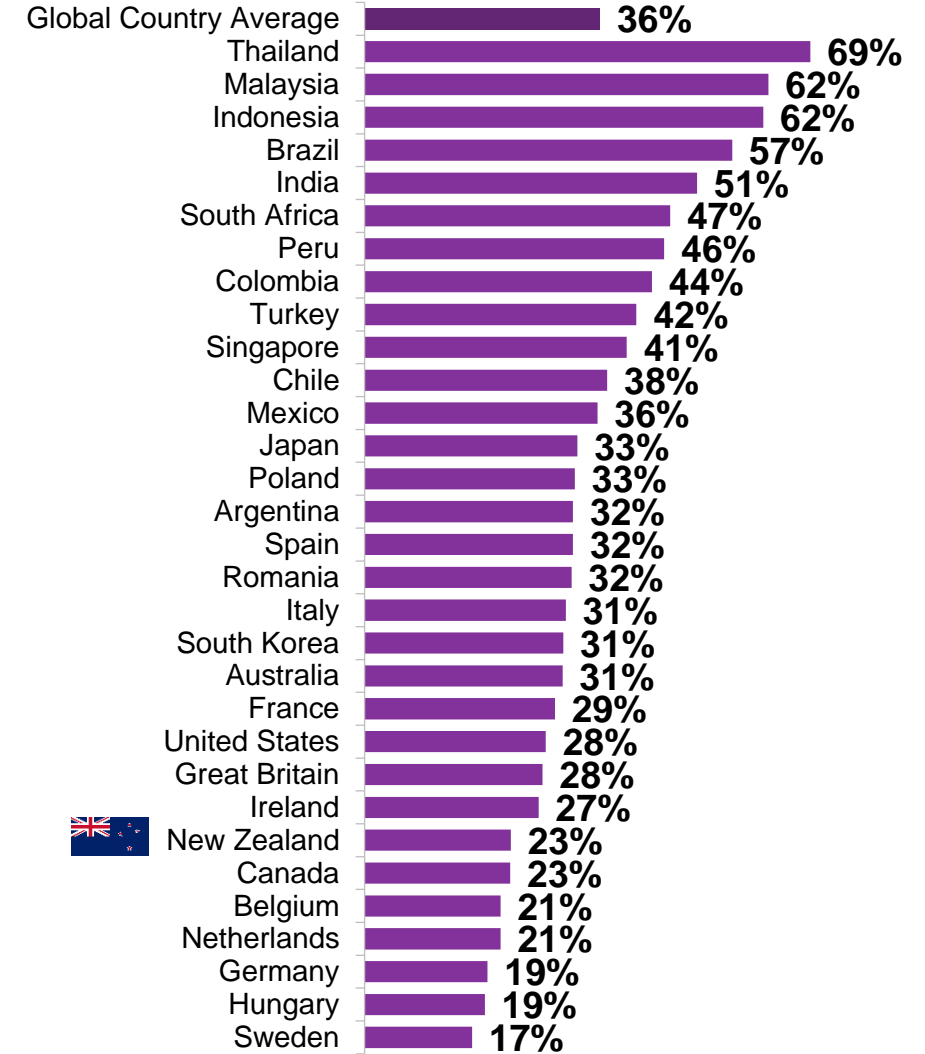
Impact of AI on Current Job

How likely, if at all, do you think it is that AI will _____ in the next 5 years?
% Likely (very/somewhat)

AI will change how you do your current job



AI will replace your current job



Base: 14,782 employed adults under the age of 75 across 31 countries, interviewed May 26 – June 9, 2023 -- online only in all countries except India.

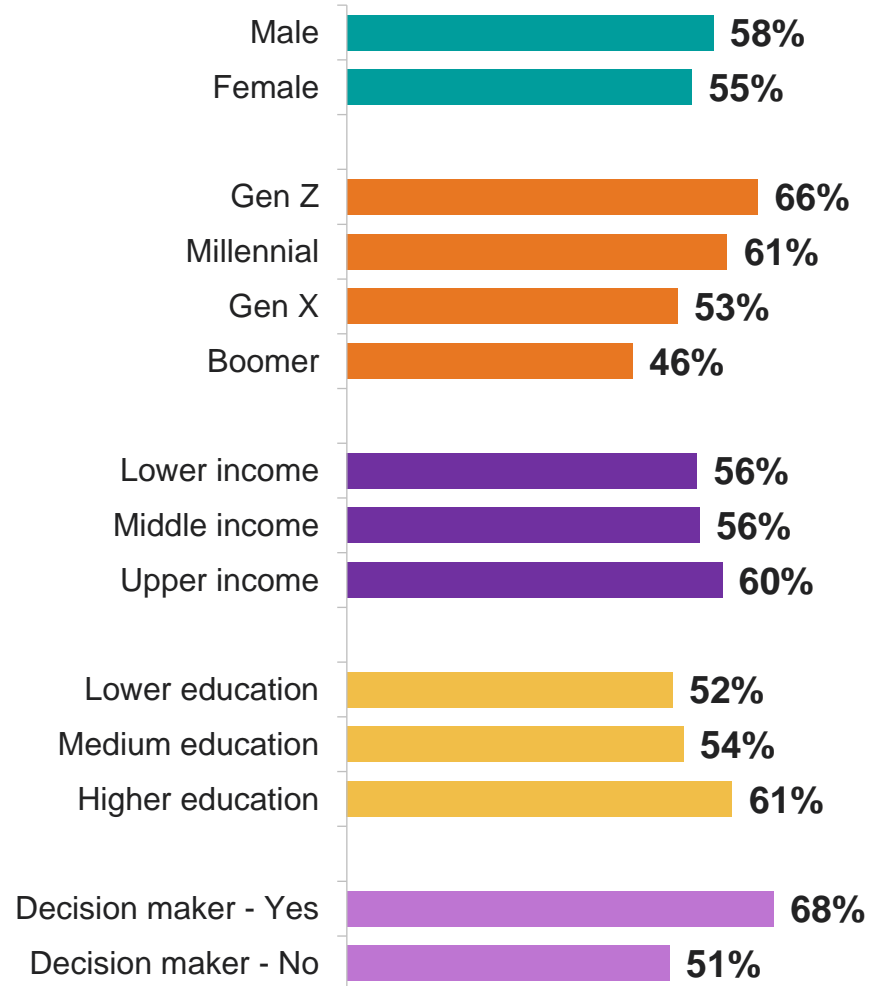
The "Global Country Average" reflects the average result for all the countries where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.

The samples in Brazil, Chile, Colombia, India, Indonesia, Ireland, Malaysia, Mexico, Peru, Romania, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population

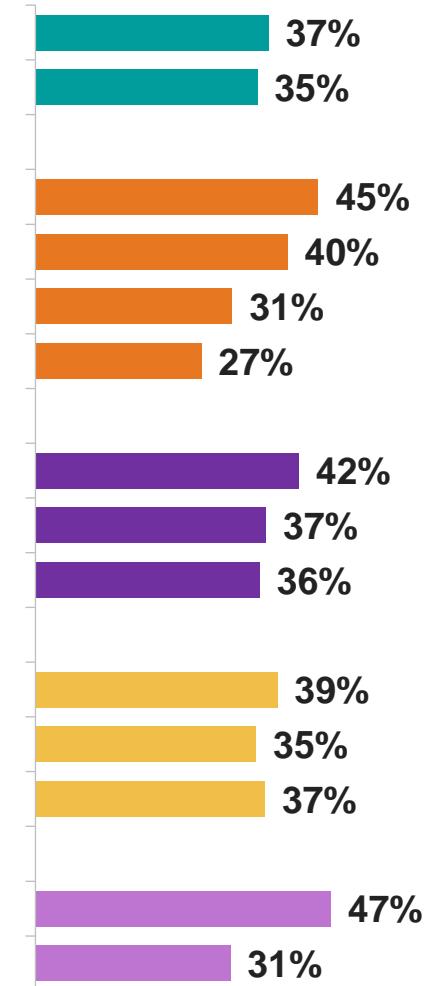
Impact of AI on Current Job

How likely, if at all, do you think it is that AI will _____ in the next 5 years?
% Likely (very/somewhat)

AI will change how you do your current job



AI will replace your current job



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5

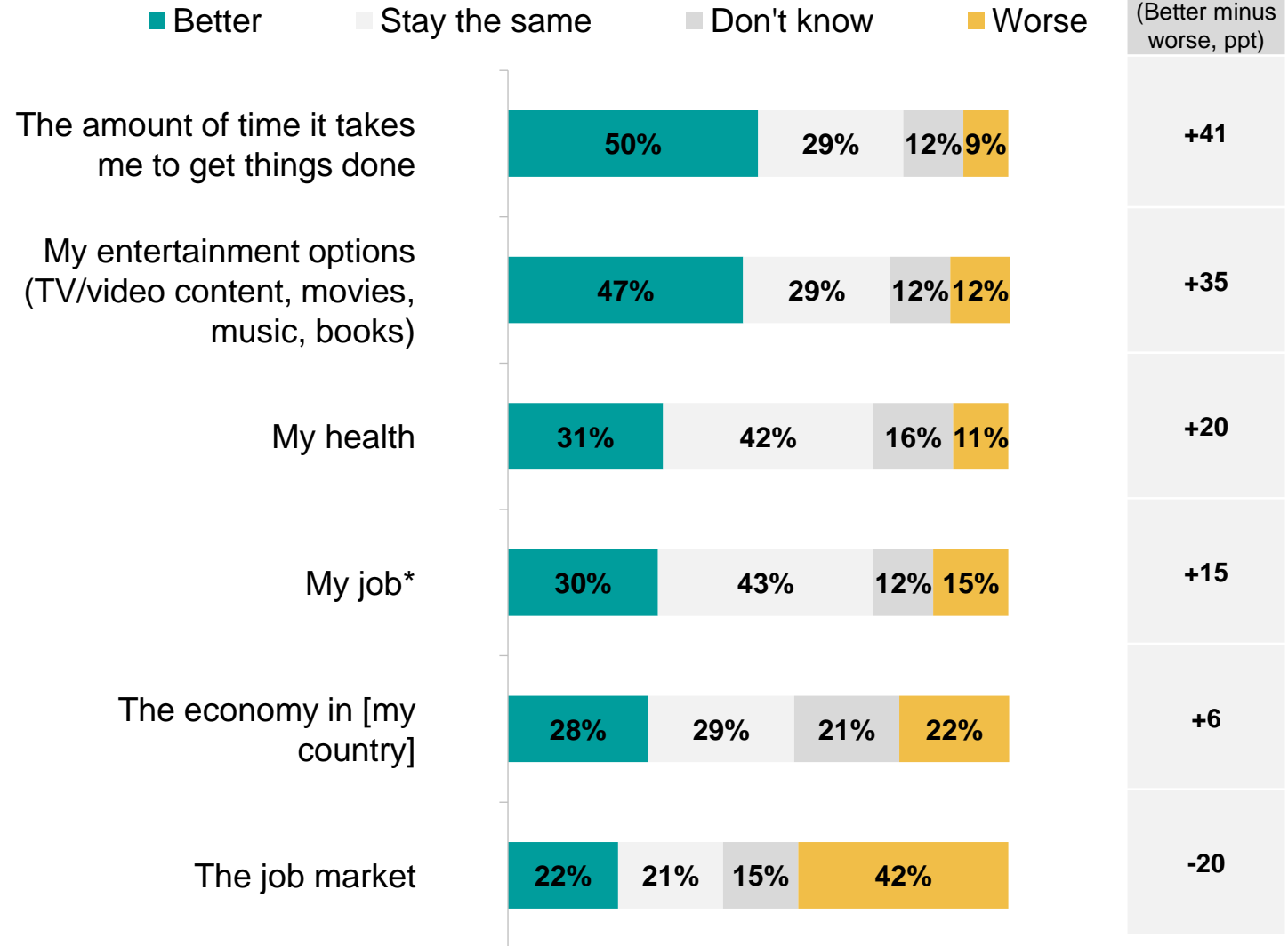
Will AI
improve life?



Views on the use of AI



Q. 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?



* "My job": asked only of those employed

Base: 22,816 adults under the age of 75 across 31 countries, interviewed May 26 – June 9, 2023 -- online only in all countries except India.

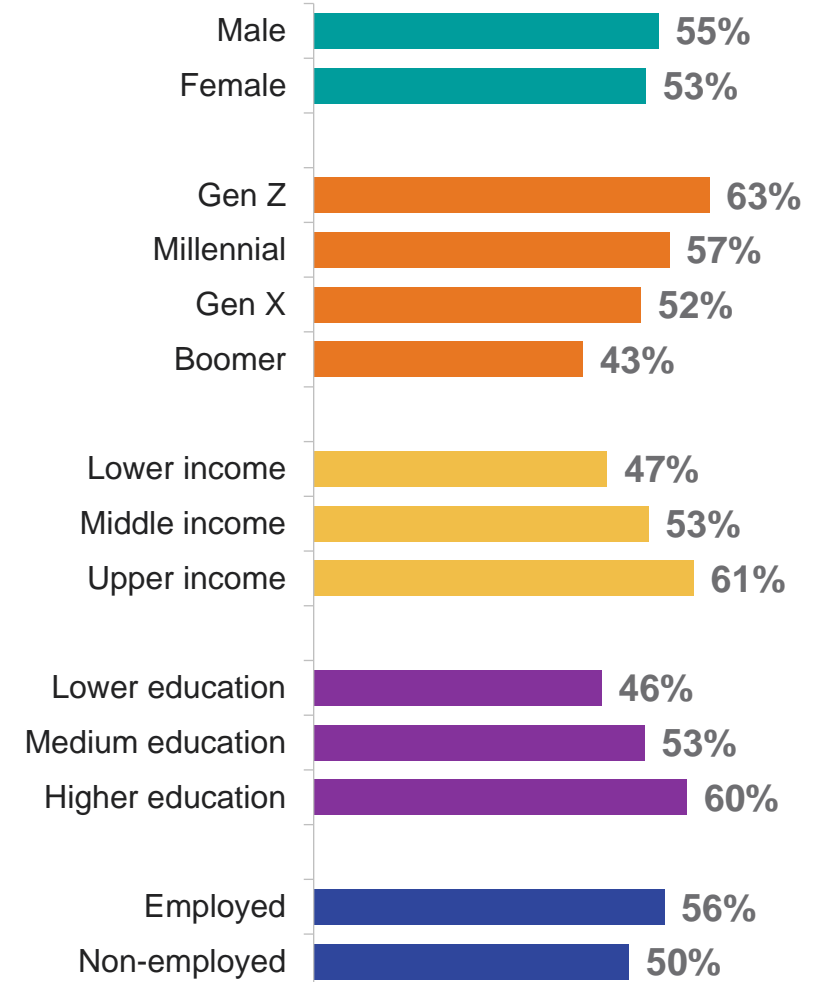
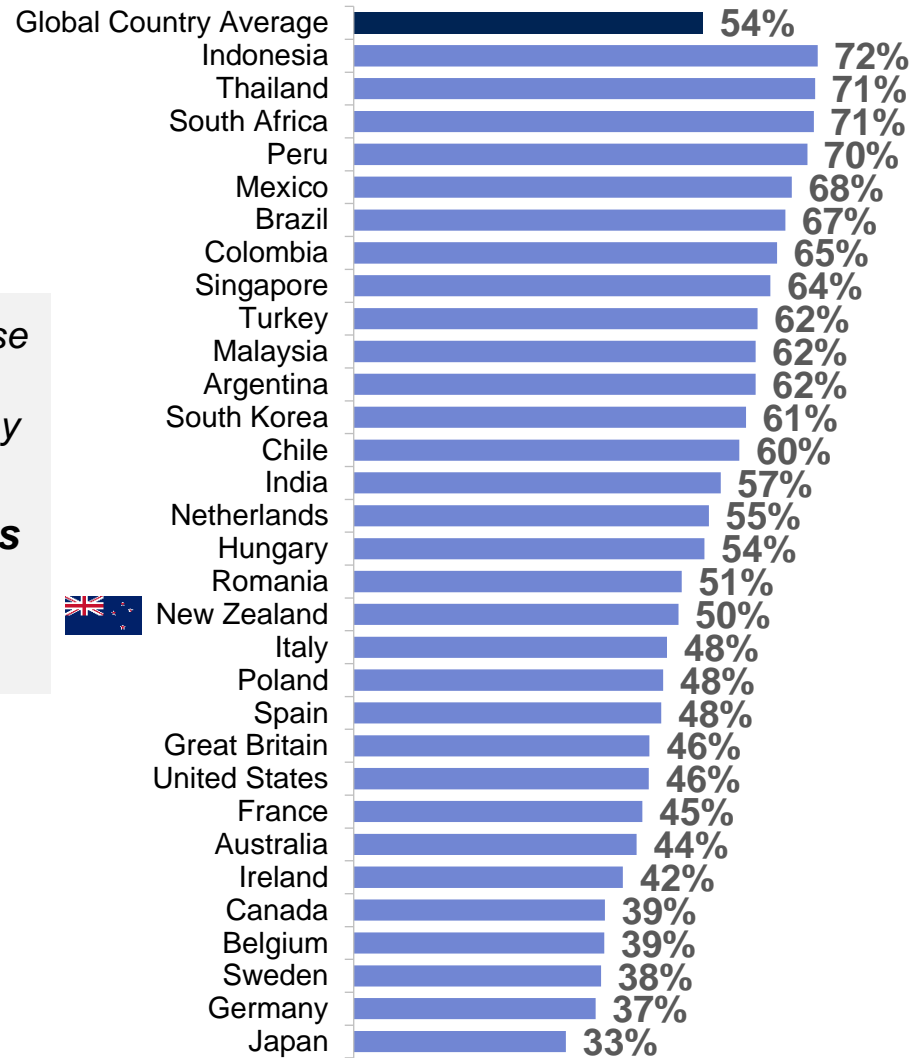
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AI and My Time

Q. 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?

The amount of time it takes me to get things done
% Better (much/somewhat)



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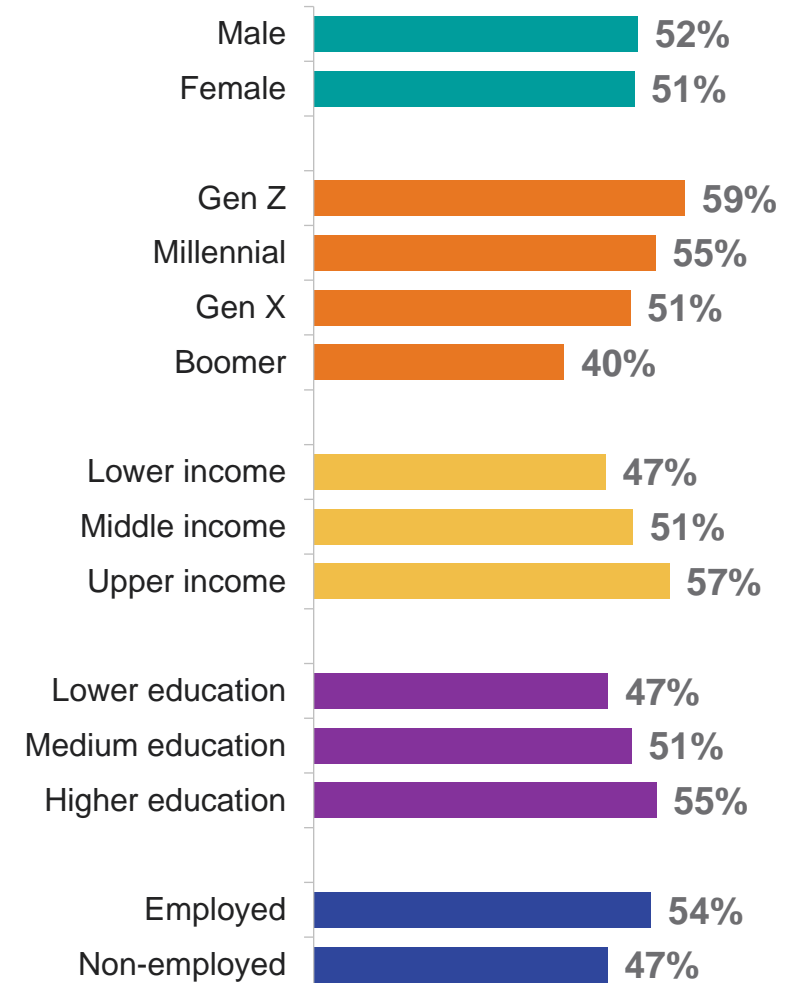
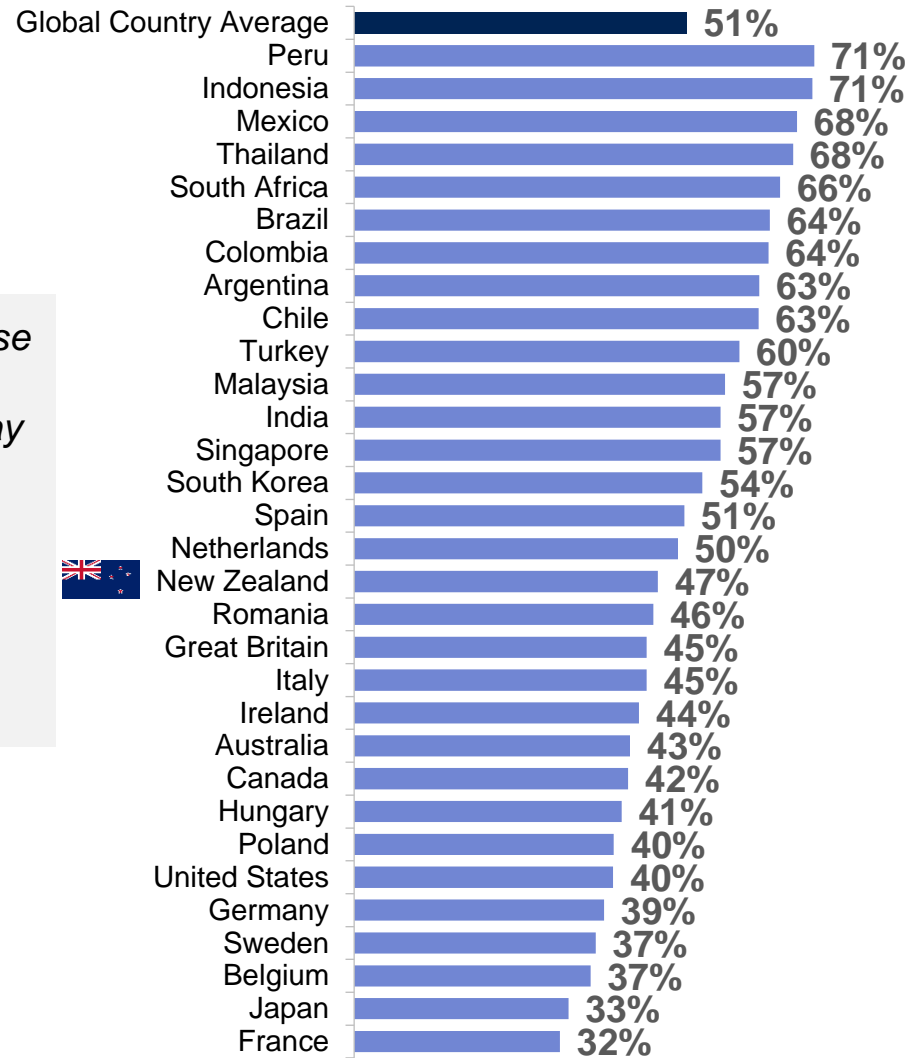
The samples in Brazil, Chile, Colombia, India, Indonesia, Ireland, Malaysia, Mexico, Peru, Romania, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population

AI and My Entertainment Options

Q. 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?

My entertainment options (television/video content, movies, music, books)

% Better (much/somewhat)



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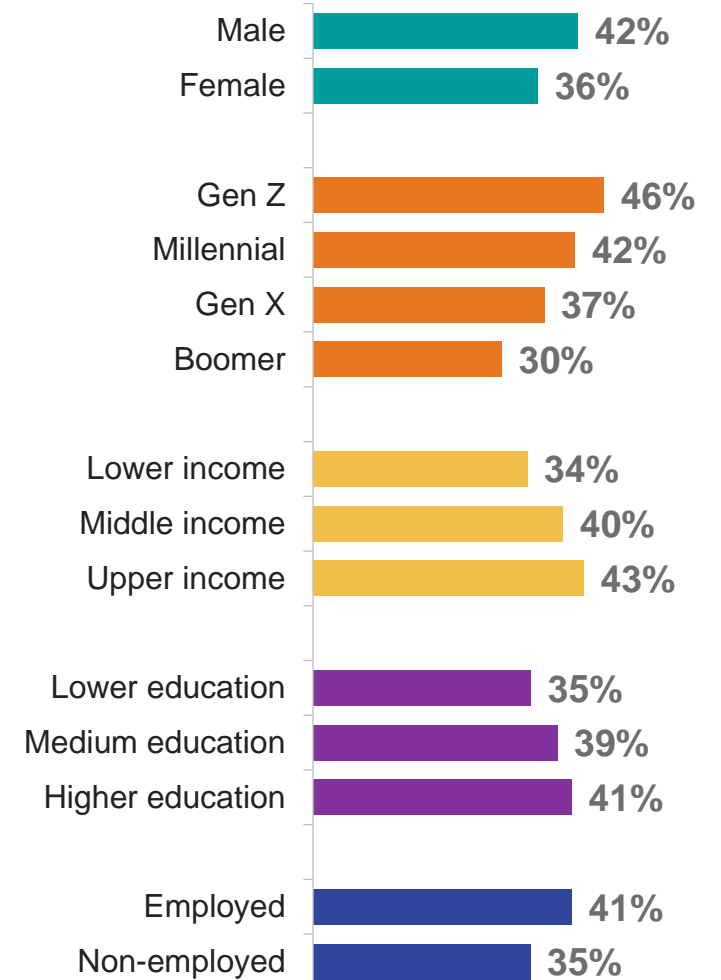
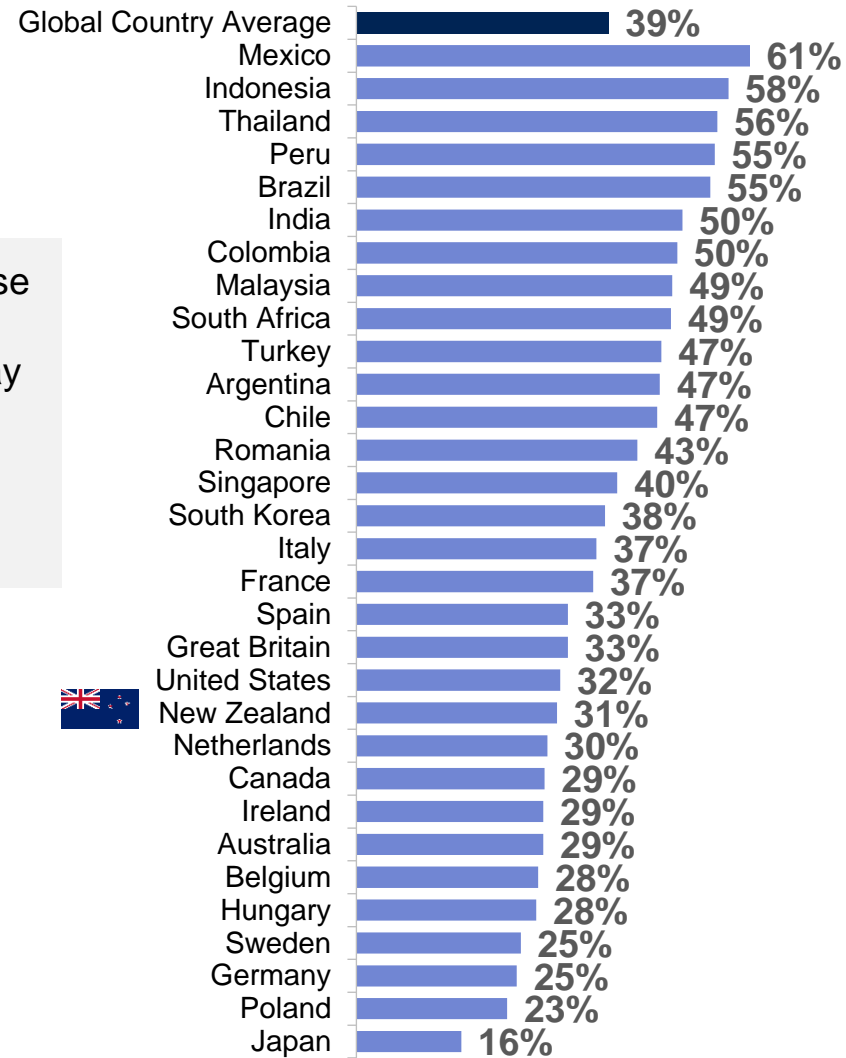
The samples in Brazil, Chile, Colombia, India, Indonesia, Ireland, Malaysia, Mexico, Peru, Romania, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population

AI and My Health

Q. 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?

My health

% Better (much/somewhat)



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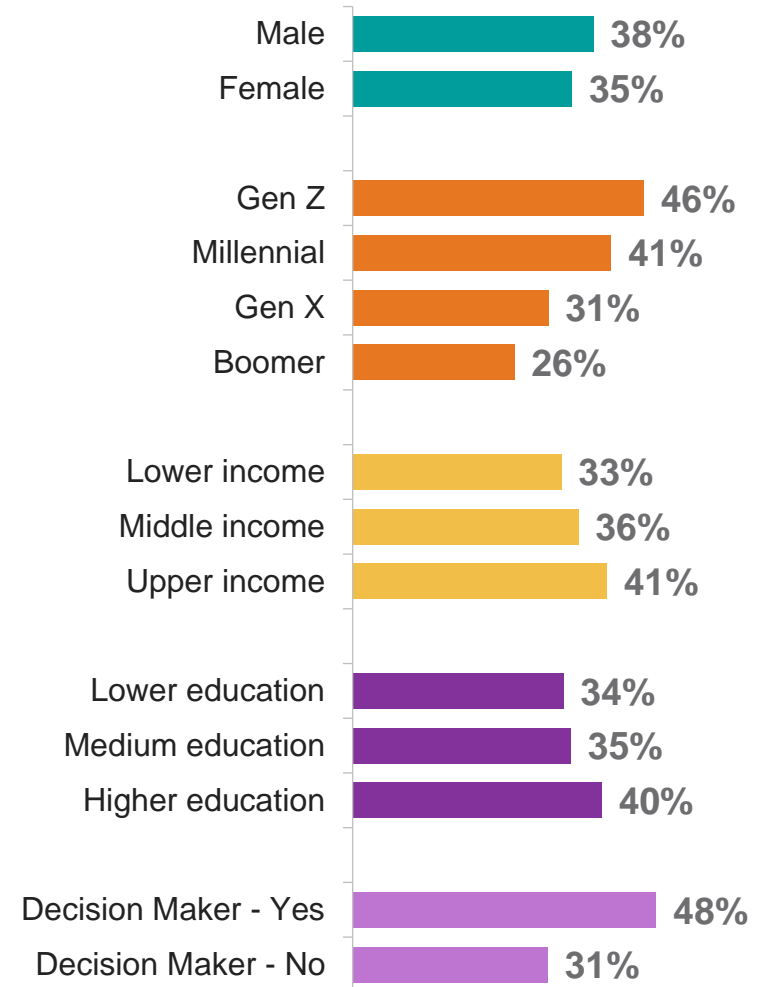
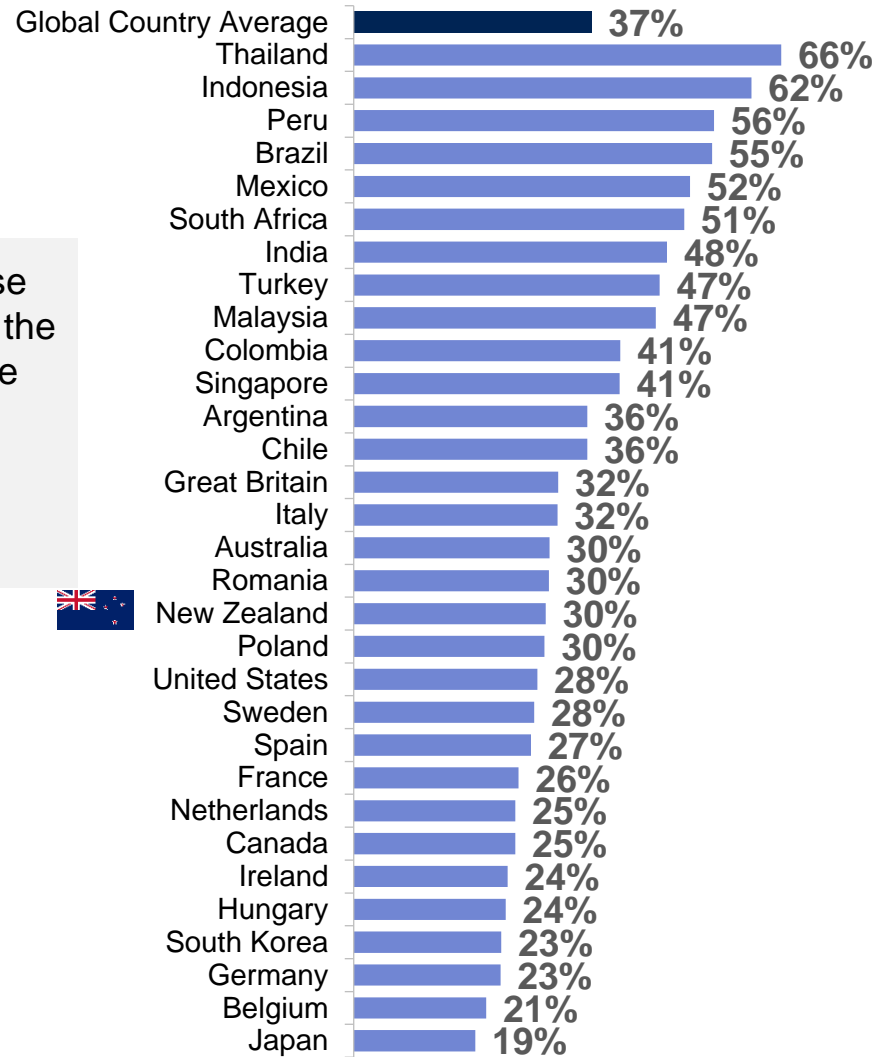
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AI and My Job

Q. 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?

My job*

% Better (much/somewhat)



* "My job": asked only of those employed

Base: 14,782 employed adults under the age of 75 across 31 countries, interviewed May 26 – June 9, 2023 -- online only in all countries except India.

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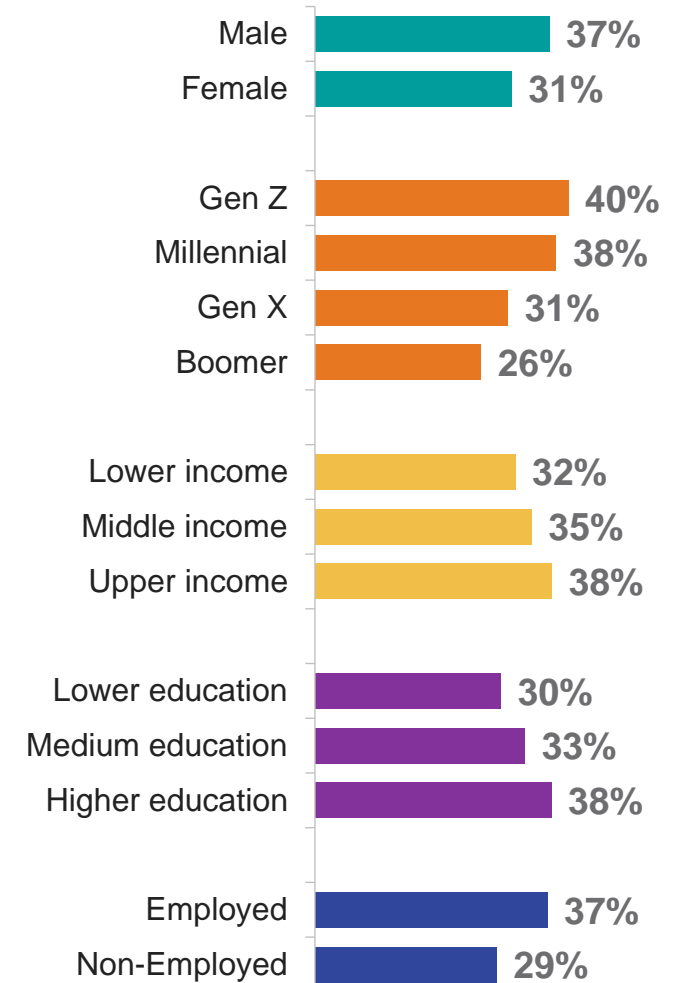
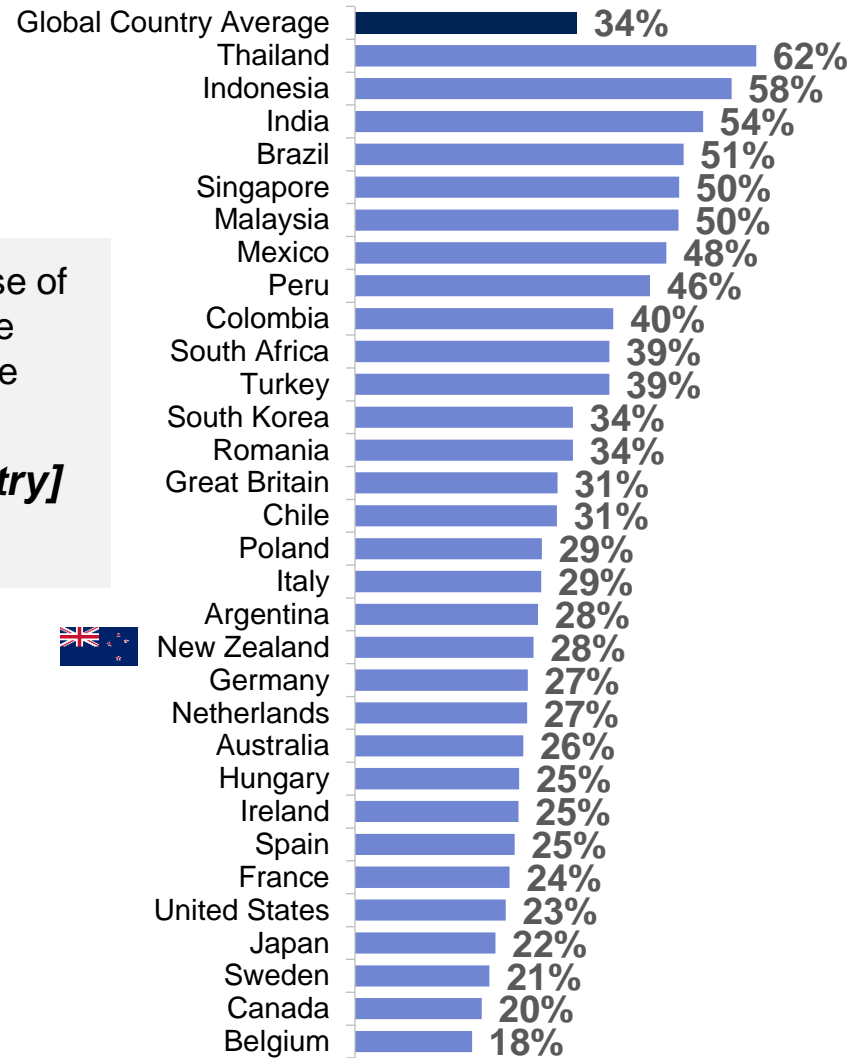
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AI and the Economy

Q. 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?

The economy in [my country]
% Better (much/somewhat)



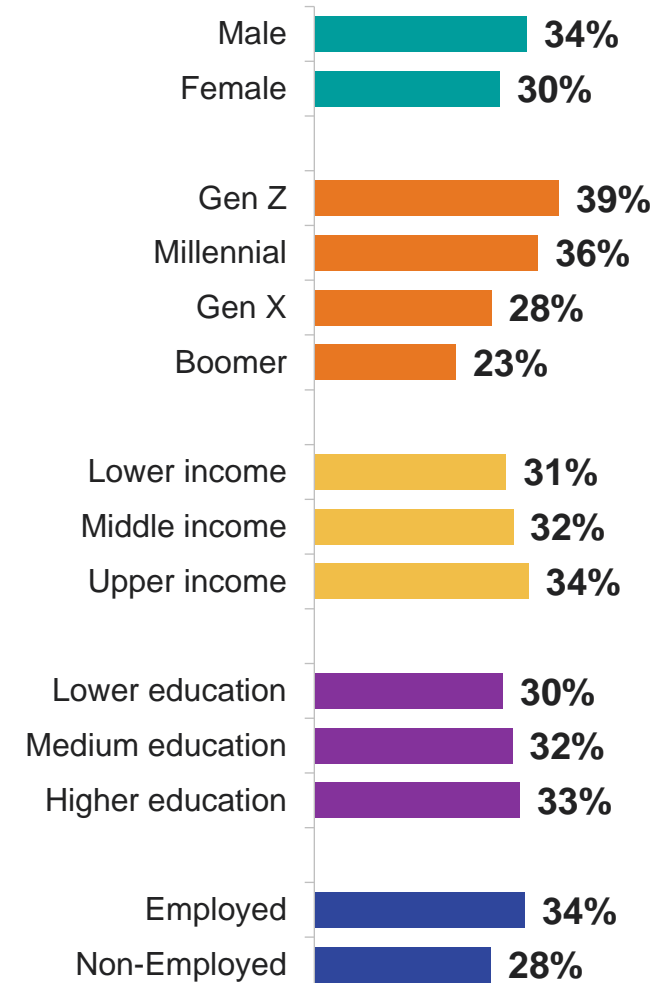
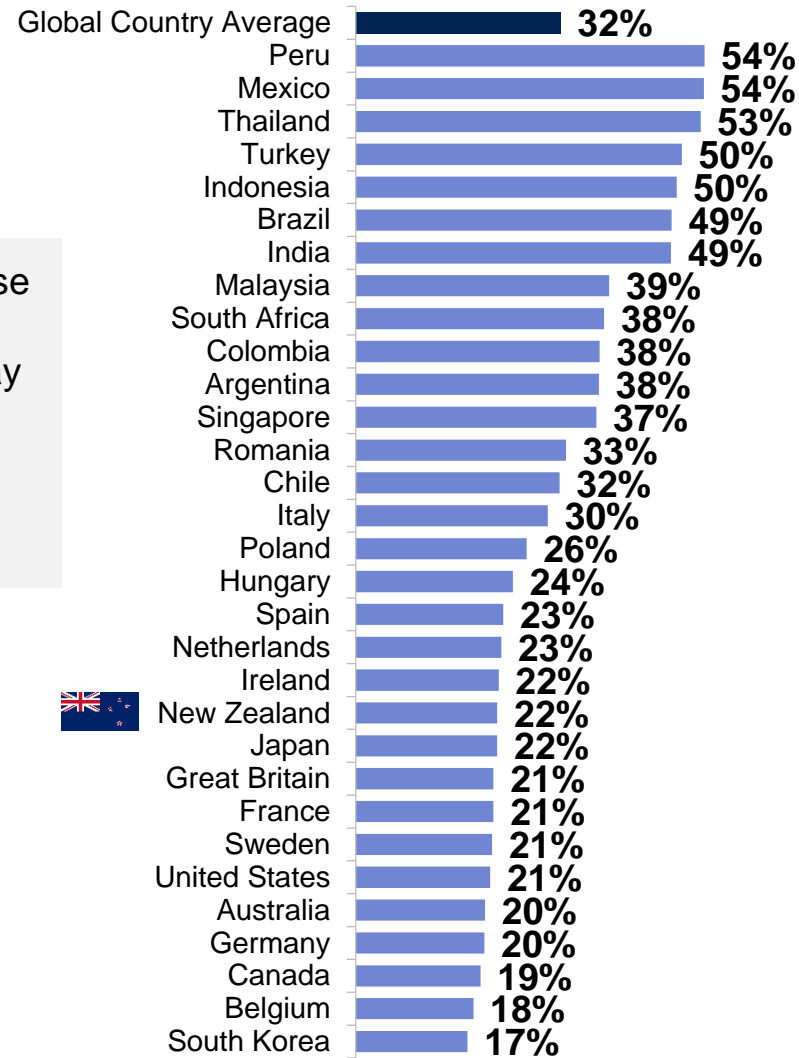
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AI and the Job Market

Q. 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?

The job market

% Better (much/somewhat)

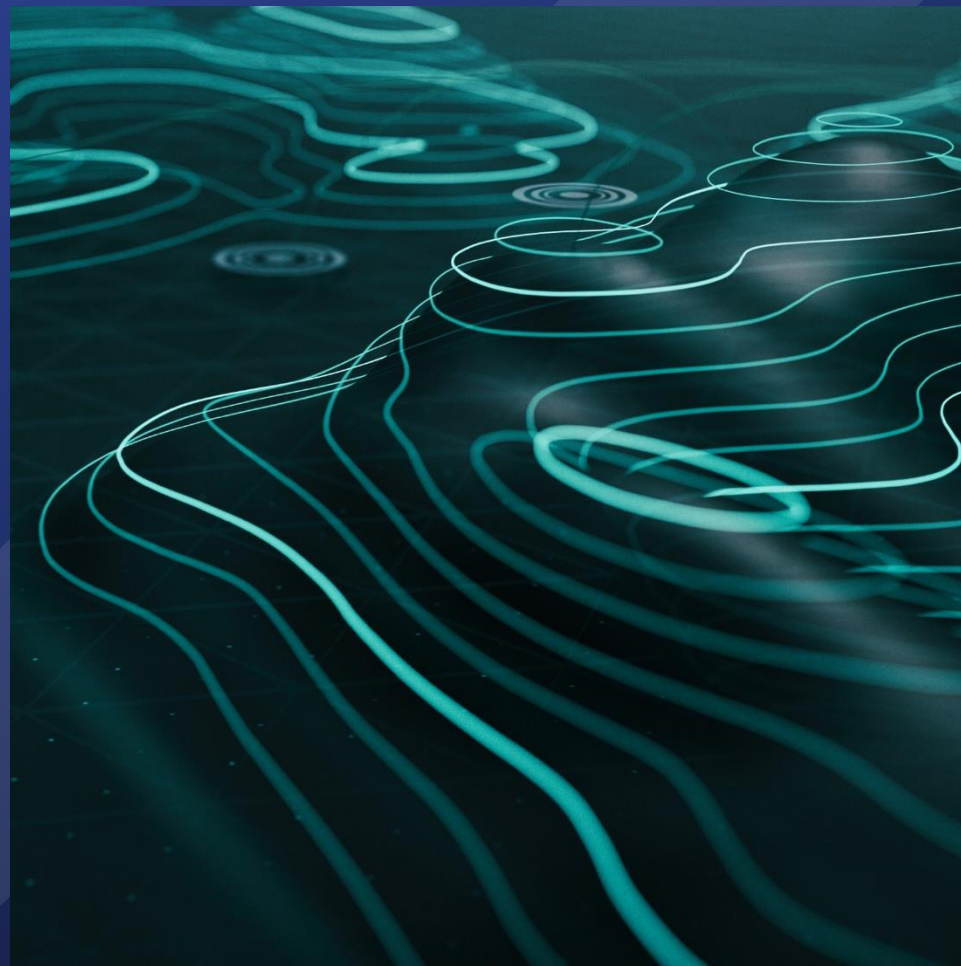


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Appendix



Views on the use of AI

Q. How much do you agree or disagree with the following: % Agree (very/somewhat)

	Global Country Average	Argentina	Australia	Belgium	Brazil	Canada	Chile	Colombia	France	Germany	Great Britain	Hungary	India	Indonesia	Ireland	Italy	Japan	Malaysia	Mexico	Netherlands	New Zealand	Peru	Poland	Romania	Singapore	South Africa	South Korea	Spain	Sweden	Thailand	Turkey	United States
I have a good understanding of what artificial intelligence is	67%	67%	59%	56%	74%	59%	70%	73%	58%	61%	64%	73%	64%	84%	58%	53%	43%	65%	75%	71%	62%	73%	69%	77%	67%	78%	76%	66%	67%	78%	73%	67%
Products and services using artificial intelligence will profoundly change my daily life in the next 3-5 years	66%	64%	62%	52%	70%	54%	71%	67%	51%	56%	58%	62%	65%	79%	53%	63%	65%	78%	71%	63%	61%	76%	59%	73%	78%	70%	82%	61%	55%	79%	81%	57%
I trust artificial intelligence to not discriminate or show bias towards any group of people	56%	61%	44%	41%	66%	44%	60%	61%	37%	47%	47%	66%	66%	76%	41%	59%	43%	68%	72%	42%	45%	72%	59%	63%	63%	65%	55%	51%	33%	83%	63%	38%
Products and services using artificial intelligence have more benefits than drawbacks	54%	57%	40%	39%	64%	38%	59%	65%	37%	42%	46%	48%	65%	78%	40%	55%	52%	69%	73%	43%	44%	67%	47%	61%	64%	59%	66%	50%	39%	74%	67%	37%
Products and services using artificial intelligence make me excited	54%	46%	40%	35%	66%	37%	51%	62%	36%	43%	42%	45%	66%	75%	38%	50%	51%	74%	74%	42%	43%	72%	50%	62%	65%	59%	76%	50%	32%	80%	74%	36%
I trust companies that use artificial intelligence as much as I trust other companies	52%	52%	42%	39%	60%	39%	51%	56%	37%	45%	45%	46%	67%	69%	39%	53%	44%	70%	66%	44%	43%	60%	50%	62%	57%	55%	55%	49%	42%	73%	65%	36%
Products and services using artificial intelligence make me nervous	52%	46%	69%	50%	51%	63%	54%	45%	52%	46%	65%	46%	58%	48%	62%	50%	23%	55%	48%	50%	63%	47%	38%	50%	53%	53%	44%	51%	53%	57%	54%	63%
I know which types of products and services use artificial intelligence	51%	44%	38%	35%	62%	38%	58%	53%	37%	39%	43%	37%	62%	76%	36%	50%	38%	68%	61%	42%	35%	65%	46%	62%	57%	60%	68%	46%	36%	73%	71%	35%
I trust that companies that use artificial intelligence will protect my personal data	50%	45%	38%	41%	56%	34%	44%	53%	32%	44%	42%	60%	64%	68%	38%	59%	32%	61%	66%	47%	42%	60%	55%	61%	54%	58%	40%	49%	39%	72%	57%	32%
Products and services using artificial intelligence have profoundly changed my daily life in the past 3-5 years	49%	45%	40%	31%	63%	34%	54%	54%	32%	33%	34%	36%	63%	72%	31%	44%	36%	71%	66%	36%	35%	65%	46%	54%	64%	57%	73%	41%	31%	72%	63%	34%

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Views on the use of AI: Change since Dec. 2021*

Q. How much do you agree or disagree with the following: % Agree (very/somewhat)

	Average 24 repeat countries	Argentina	Australia	Belgium	Brazil	Canada	Chile	Colombia	France	Germany	Great Britain	Hungary	Italy	Japan	Malaysia	Mexico	Netherlands	Peru	Poland	South Africa	South Korea	Spain	Sweden	Turkey	United States
I have a good understanding of what artificial intelligence is	+3	+3	-0	-4	+5	-1	-6	+2	+9	+11	+7	+6	+11	+3	+4	+1	+6	-2	+3	-0	+3	+4	+7	+5	+4
Products and services using artificial intelligence will profoundly change my daily life in the next 3-5 years	+7	+4	+12	+0	+10	+11	+3	+2	+6	+12	+12	+7	+11	+12	+6	+5	+10	+5	+3	-2	+6	+5	+5	+8	+11
Products and services using artificial intelligence have more benefits than drawbacks	+3	+2	+2	+2	+7	+6	-4	+1	+6	+5	+8	-1	+4	+10	+5	+8	+10	-3	-1	+2	+4	-3	-1	+7	+2
I trust companies that use artificial intelligence as much as I trust other companies	+3	-3	+6	-1	+9	+5	-5	-0	+3	+3	+9	-1	+5	+6	+9	+6	+7	+0	-1	-1	+8	-0	+3	+3	+1
Products and services using artificial intelligence make me nervous	+12	+14	+18	+9	+16	+14	+18	+6	+19	+9	+16	+14	+24	+3	+7	+10	+14	+12	+8	+1	+13	+3	+16	+6	+11
I know which types of products and services use artificial intelligence	+1	-3	-1	-3	+4	+1	-1	-9	+3	+2	+6	-0	+4	+5	+7	-1	+1	+2	-6	+2	+8	-0	-1	+11	-4
Products and services using artificial intelligence have profoundly changed my daily life in the past 3-5 years	+1	-8	+4	-6	+12	+2	-4	-5	-1	+2	+1	-2	+3	+5	+6	+4	-3	-0	+2	+1	+11	-8	+1	+3	-2

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*Note: New Zealand not included in December 2021 survey

Methodology

- These are the findings of a 31-country Ipsos survey conducted on Ipsos's Global Advisor online survey platform and, in India, on its hybrid IndiaBus, May 26 – June 9, 2023, among 22,816 adults aged 18 and older in India, 18-74 in Canada, the Republic of Ireland, Malaysia, New Zealand, South Africa, Turkey, and the United States, 20-74 in Thailand, 21-74 in Indonesia and Singapore, and 16-74 in 20 other countries.
- Each country's sample consists of ca. 1,000 individuals in each of Australia, Brazil, Canada, France, Germany, Great Britain, Italy, Japan, **New Zealand**, Spain, and the U.S.; and ca. 500 individuals in each of Argentina, Belgium, Chile, Colombia, Hungary, Indonesia, Ireland, Malaysia, Mexico, the Netherlands, Peru, Poland, Romania, Singapore, South Africa, South Korea, Sweden, Thailand, and Turkey. The sample in India consists of approximately 2,200 individuals, of whom ca. 1,800 were interviewed face-to-face and 400 were interviewed online.
- The samples in Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, the Netherlands, **New Zealand**, Poland, South Korea, Spain, Sweden, and the U.S. can be taken as representative of these countries' general adult population under the age of 75.
- The samples in Brazil, Chile, Colombia, Indonesia, Malaysia, Mexico, Peru, Romania, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population. The survey results for these markets should be viewed as reflecting the views of the more "connected" segment of their population.
- India's sample represents a large subset of its urban population – socio-economic classes A, B, and C, in metros and tier 1-3 town classes across all the country's four zones.
- The data 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 country average" or "31-country average" reflects the average result of all the countries 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 knows 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 and of 500 accurate to +/- 5.0 percentage points. For more information on Ipsos's use of credibility intervals, please visit the Ipsos website.
- The publication of these findings abides by local rules and regulations.

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Ipsos is the third largest market research company in the world, present in 90 markets and employing more than 18,000 people.

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“Game Changers” – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

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At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

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To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

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You act better when you are sure.

