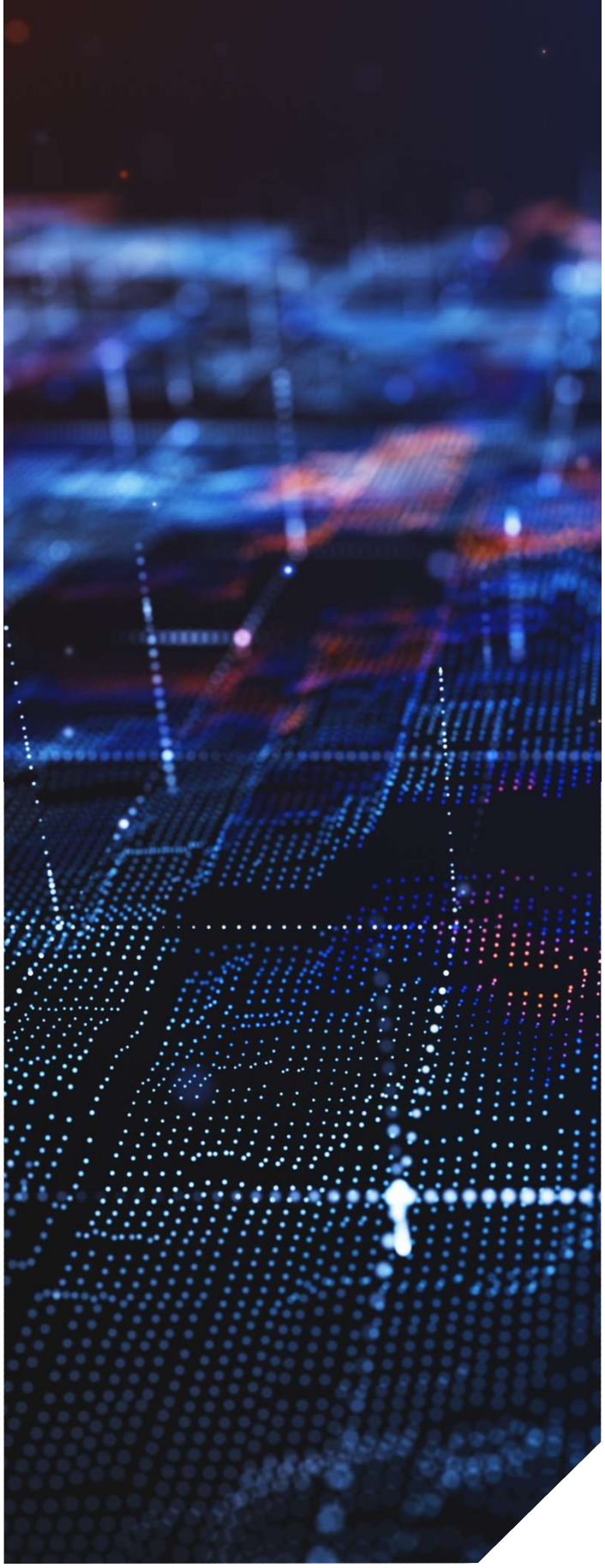
AI AND THE FUTURE:
BUILDING A POSITIVE HI + AI PARTNERSHIP



Executive Summary

As people have begun to experiment with AI and realize its potential, they see how AI could impact more than just their jobs. They recognize positives, like reducing the time spent on boring and repetitive tasks and helping them synthesize information more quickly. At the same time, they are uneasy when they consider the impact AI could have on human development related to strategic thinking, creativity and problem solving.

Recognizing that people approach AI with a mix of optimism or skepticism, businesses must design products and develop messaging that meets people where they're at.

Part 1 & 2 of this series concluded that current adoption of AI is driven by user curiosity and needs, not corporate strategy. We open by recapping the friction between individual motivation and organizational inertia.

- In **Part 1: AI at Home**, we determined that AI adoption is faster in emerging markets and that usage is quickly moving from experimentation in our personal lives to daily use.

- In **Part 2: AI at Work**, we explored the "Paradox of the AI Economy," where we learned that motivated users are personally paying for AI tools because their employers are too slow to adopt and operationalize AI in the workplace. We also revealed that the "Correction Tax", time spent verifying and editing AI output, is a universal pain point in all markets and for all use cases.

Part 3, AI and the Future, considers what this means for the future. We focus beyond current usage to explore the future hopes and fears of people. We'll look at how people are trying to resolve tensions and gain the most benefit possible from this emerging technology. We'll also offer ways to take advantage of the AI adoption patterns across the markets.

Topics covered in this paper:

01 The Central Conflict: Strengthening vs. Weakening

02 Four Audiences of Focus

03 Market-Specific AI Adoption Hurdles

04 Bridging the Gap with Users

01

The Central Conflict: Strengthening vs Weakening Human Capabilities

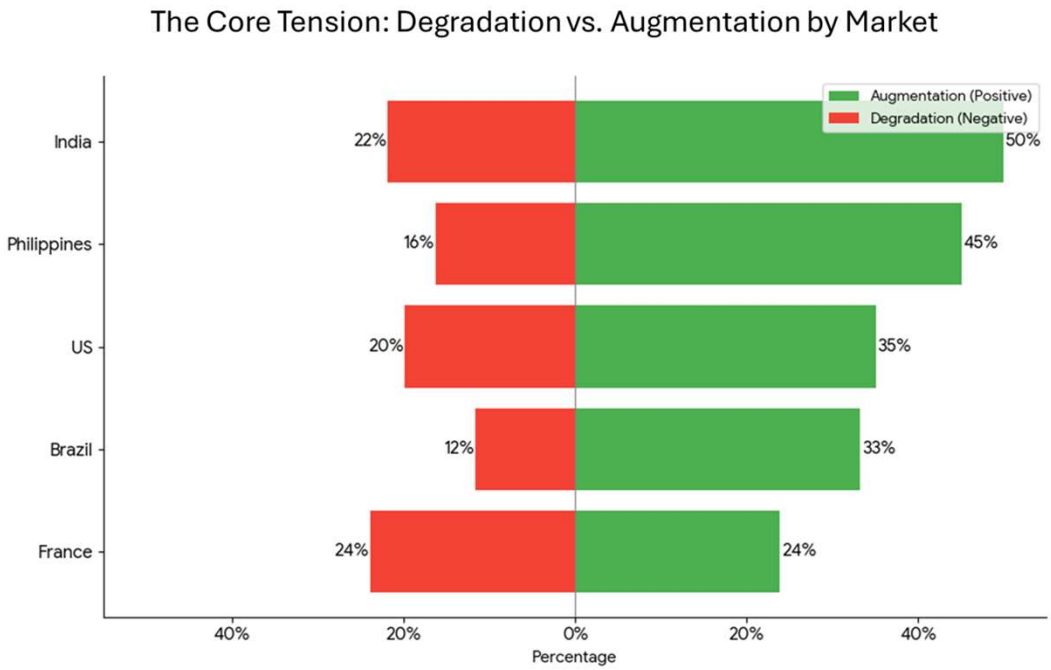
People are struggling with the dilemma: ***Is AI making us better, or is it making us obsolete?***

The Global Split:

Any global discussion on AI's future should account for the split between enthusiasm for AI's positive impacts on human capabilities and caution about negative impacts on human cognition. The current tension is less about the technology itself and more about the diverse societal values and economic priorities of markets adopting AI.

Data reveals a fundamental split in public perception:

- India and the Philippines (high-growth Asia-Pacific economies) show **significant confidence** in the role of AI as an accelerator for development and opportunity.
- US and Brazil exhibit a **practical acceptance** of AI while acknowledging risks like job displacement and control.
- France shows a **high level of caution** and **concern** particularly related to job security, privacy, and control.



The chart above illustrates the core tension between the positive and negative implications of AI (the desire for new AI capabilities to help humans) across the five key markets.

- *Negative: The percentage of respondents who expressed a concern about the "Loss of human skills or creativity" is highest in France, India and the U.S.*
- *Positive: The remaining percentage of respondents who did not select this specific concern is highest in India, the Philippines and the U.S.*

Pessimism and Anxiety - AI degrades human cognition

Much of the concern is not just about robots taking jobs, but humans losing skills. People fear that relying on AI for ideas and analysis will degrade critical thinking.

> *...AI is actively causing humans to lose what little critical thinking skills they once had." (US005)*

> *I anticipate a reduction in my own cognitive efforts, compensated by an increased reliance on AI." (FR099)*

These concerns highlight the need to build AI that helps the user think creatively, problem solve and doesn't take the place of human intelligence. This can be done in several ways including:

1. Customize AI outputs for each person by modeling their thought patterns that reflect unique personality, thinking styles, biases, and behaviors. Doing so will help bolster the user's critical thinking, problem-solving, and creativity, rather than diminish their skills.
2. Be transparent in the approach AI is using to reason through problems. Users can learn to problem solve or generate new ideas better when they can see the process that AI uses to deliver outputs.
3. Give people control so they can adjust AI outputs easily in a way that makes them the teacher of AI, rather than a passive recipient of AI's solutions and ideas.
4. Position AI as a partner that helps humans problem solve and be creative, faster and easier, with the support of AI.

Optimistic view - AI takes the mundane tasks from humans

The good news from our survey indicates more people are unconcerned about a decline in human intelligence from the growth of AI. Instead, users in most markets think AI will benefit humans by freeing them up from mundane, repetitive tasks.

By using AI to automate common activities that humans would prefer not to do, it opens the door for people to bring the strategic, creative soft skills to the equation. AI will give people back the time they currently waste on dreary, day-to-day tasks that don't require deep thinking.

> *I am convinced that repetitive tasks will be entirely relegated to AI, compelling human skills to serve as the primary means of differentiation." (BR022)*

> *At work, I expect it'll handle the boring, repetitive stuff (emails, reports, scheduling) so I can focus more on creative or big-picture thinking." (IN130)*

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Four Audiences of Focus

Segmenting users based on their AI perceptions and usage behavior enables us to be more targeted in our strategies for product development, marketing, policy, and education:

A cluster analysis reveals 4 distinct audience segments:

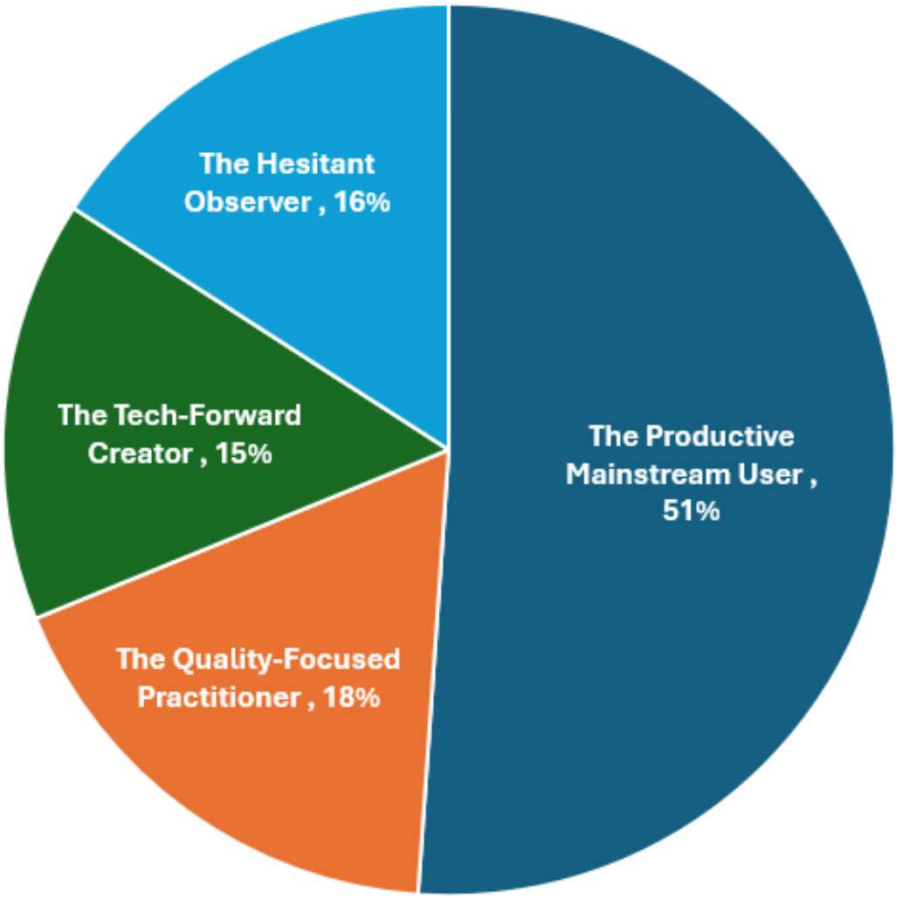


Chart shows the proportion of participants classified (across 5 markets) into each cluster.

Variables considered in cluster analysis include: AI familiarity, perceived helpfulness, usage frequency (personal and work), agreement with AI benefits, and primary motivations and tool usage (Language Models, Grammar, Image Generators),

AI Schools of Thought:

1 The Productive Mainstream User (Practical User) 51% Share

This large, pragmatic group integrates AI into routine tasks, to achieve incremental productivity and time savings without venturing into complex or novel applications.

ATTITUDE

Average familiarity & Moderate belief in helpfulness of AI.

AI TOOLS USED

Grammarly, Wordtune, ChatGPT, Gemini/Bard, Jasper, Copy.ai, Beautiful.ai, Decktopus

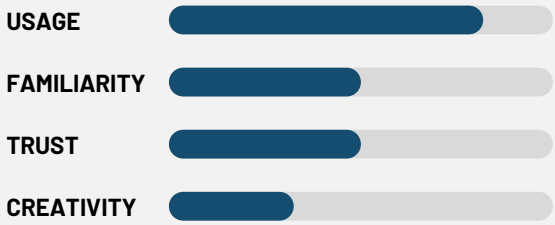
MOTIVES FOR USING AI

Time Saving & Productivity.

DEMOGRAPHIC SKEWS

Skew to Males & Ages 35-54

SIGNALS



> *I use AI to* automate boring tasks and helping to solve problems faster.." *(IN015)*

ADOPTION STRATEGY

Embed features into existing platforms (Email, CRM) to minimize friction. Focus on eliminating hated, repetitive tasks.

2 The Quality-Focused Practitioner (Positive but Measured) 18% Share

This group holds a strong belief in AI's capacity to improve quality and speed but uses it selectively and moderately as a dependable partner.

ATTITUDE

Strong belief in the value of AI but demands control.

AI TOOLS USED

Gemini/Bard, ChatGPT, Wordtune, Grammarly, Stable Diffusion, Midjourney, GitHub Copilot

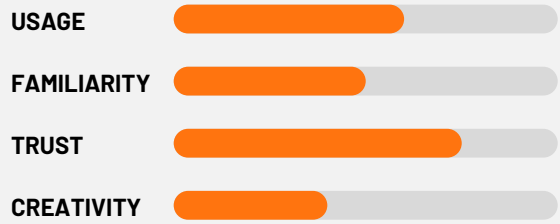
MOTIVES FOR USING AI

Quality output & gaining knowledge.

DEMOGRAPHIC SKEWS

Skew to Females & Ages 35-54

SIGNALS



> *AI tools make mistakes so having knowledge of it is important to verify whether is it giving right information or not. Can't follow it blindly"* (IN156)

ADOPTION STRATEGY

Prioritize trust with source-grounding and confidence scores. Position AI as a "Second Option" for quality assurance.

AI Schools of Thought:

3 The Hesitant Observer (Cautious and Unfamiliar) 16% Share

This small, skeptical group exhibits the lowest familiarity and usage of AI and remains passive, waiting for the technology to mature due to concerns.

ATTITUDE

Least familiar, find AI least helpful

AI TOOLS USED

ChatGPT, Gemini/Bard, Wordtune, Grammarly

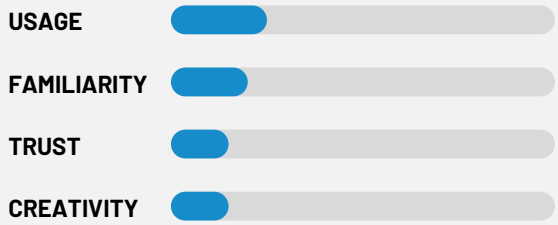
MOTIVES FOR USING AI

Lack specific motivations to use AI

DEMOGRAPHIC SKEWS

Skew to Females & Ages 18-34

SIGNALS



> *"I only want to interact with the source. I have no interest in any creative or entertaining uses of AI and plan to avoid things that are overly reliant on AI" (US053)*

ADOPTION STRATEGY

Implement "invisible AI" embedded in familiar tools (e.g. spellcheck) to bypass apprehension and prove value silently.

4 The Tech-Forward Creator (Aggressive Adopter) 15% Share

This highly engaged group uses AI at the highest frequency for creative, transformative, and novel tasks, viewing it as a way to expand capabilities.

ATTITUDE

Highly familiar, optimistic, find AI enjoyable.

AI TOOLS USED

ChatGPT, Gemini/Bard, DALL-E, Midjourney, Stable Diffusion, (GitHub Copilot, Amazon CodeWhisperer, Jasper, Copy.ai

MOTIVES FOR USING AI

Creativity, Transformation, Speed.

DEMOGRAPHIC SKEWS

Skew to Males & Ages 35-54

SIGNALS

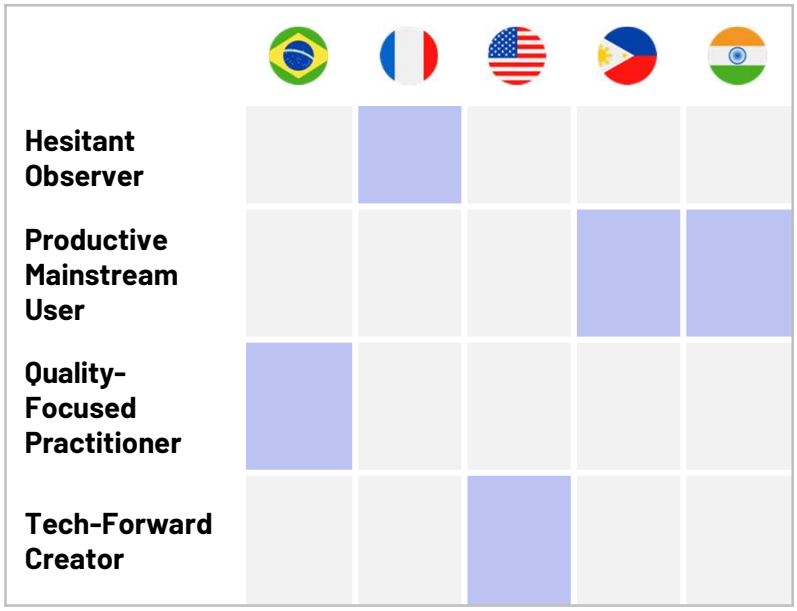
> *"I use AI for more advanced things, like connecting different interfaces using automated agents" (FR111).*

ADOPTION STRATEGY

Provide early access to experimental features. Allow them to build, deploy, and monetize their own AI agents.

We see interesting trends when we map those audiences to the five markets we surveyed.

- The USA has highest proportion of Tech Forward Creators which aligns with the dominance of AI development in the U.S.
- France has the highest percentage of Hesitant Observers which reflects cultural concerns about the impact of AI on human intelligence.
- Brazil has the highest proportion of Quality-Focused practitioners who seek help from AI to deliver better outputs.
- PH and IN have the highest percentage of Productive Mainstream Users who are eager to capitalize AI's benefits of productivity and quality.



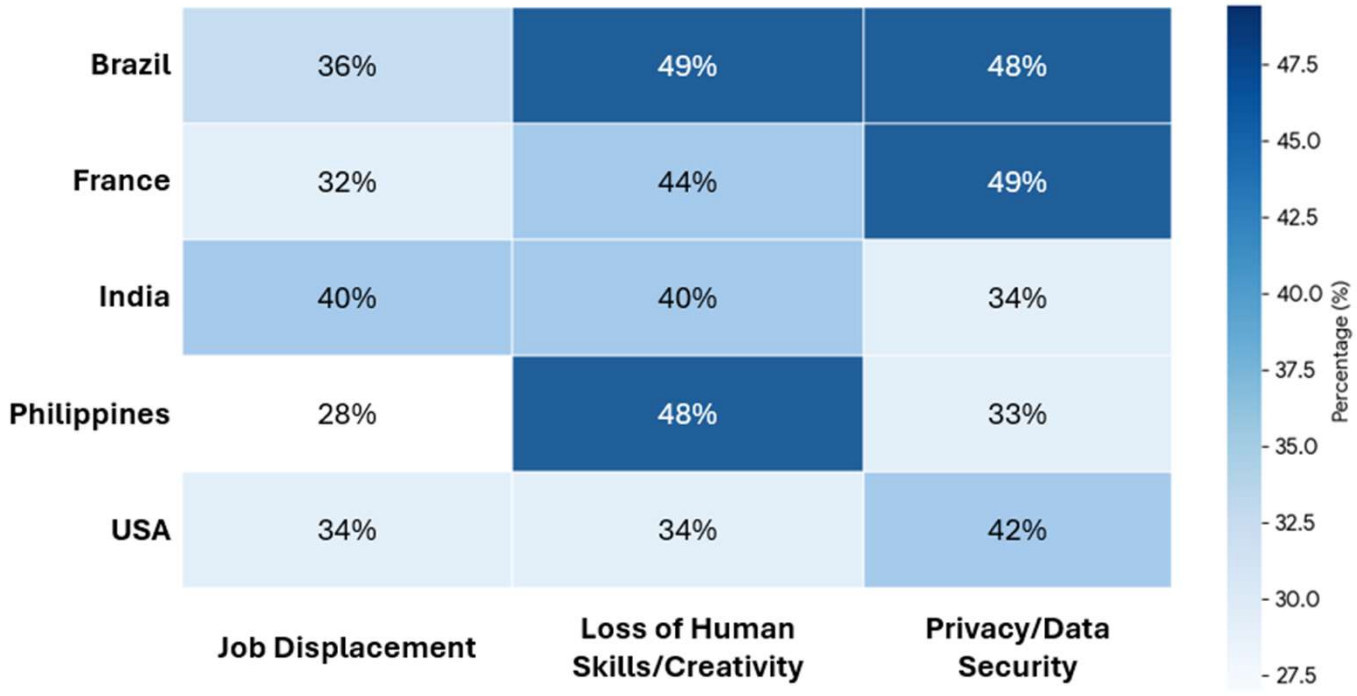
03

Market-Specific AI Adoption Hurdles

Across the five markets, the two biggest concerns regarding AI adoption are:

1. **Loss of Human Skills/Creativity:** This category shows the highest levels of concern overall (average 43% across markets). It is the top concern in **Brazil (49%)** and **Philippines (48%).**
2. **Privacy/Data Security:** This is also a major hurdle (average 41% across markets), topping the list in the **USA (42%)** and **France (49%)**, and the second-highest concern in **Brazil (48%).**

Job Displacement appears to be a moderate concern (average 34% across markets), with percentages generally ranging from **28% to 40%.** Highest concern for job displacement in India (40%) compared to all other markets. While it is a significant issue, most markets have other more prominent concerns.



04

Conclusion: Accelerate Meaningful Growth by Bridging the Gap

The future of AI isn't in replacing human intelligence, instead AI should enhance human skills as a partner that meets the user where they are. This requires a dual mandate: **First,** businesses must build the tools that will automate repetitive tasks to the benefit of many. **Second**, businesses must narrow their offers to address the needs of unique audiences based on how they want AI to help them and what risks they perceive from AI-enabled products and services.

For Developers

Developers have the opportunity to build solutions for boring, repetitive tasks,

- The Mainstream User Group wants ways to free up their time to think creatively and strategically rather than build another spreadsheet or collate another set of data.
- Adopt a design philosophy that provides clear source citations, transparency of approach, and robust user control to build intrinsic trust.

For Employers

Employers should close the skills gap by providing access and training, treating AI as a tool for professional fulfillment

- Implement mandatory, systematic training and provide immediate, secure access to AI tools on the job to transform employees into super-charged thinkers.
- Actively direct the time saved by AI automation toward high-value, creative, and educational initiatives to counter fears of job loss and replacement by AI.

Final Thoughts

From this study we see that people are open to employing AI to become more productive, creative and strategic as long as they can continue to learn and grow as AI is trained to do more faster and efficiently.

A targeted approach recognizes that users form distinct audiences of focus are driven by unique and often competing motivations (e.g., efficiency vs. creative power) and blocked by specific fears (e.g., effort vs. job loss). Adopting a targeted strategy is essential to maximize AI success and minimize deployment risk by directly addressing the diversity of concerns and aspirations of current and prospective AI users.

Designing solutions and messaging that caters for these individual nuances is likely to help drive high user adoption and achieve scalable, successful deployment across diverse global markets.

Technical Note: Research is based upon an online survey of 819 consumers sourced from online panels in five markets: USA, France, Brazil, Philippines and India with fieldwork undertaken in September 2025.
Sample sizes per market: USA: 222, France: 134, Brazil: 147, Philippines: 142 and India: 174

THANK YOU

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