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Excitement   Concern

Good thing   Bad thing

Our life with AI:

The reality of today and the promise of tomorrow

Innovation   Responsibility

Bold   Cautious

A global report from
Google and Ipsos

January 2024

Foreword.

We are at an inflection point with AI. 2023 brought breakthroughs across diverse sectors of artificial intelligence, from the explosion of generative AI to increasingly sophisticated AI-powered personal assistants, to advancements in healthcare, security, and manufacturing. Field-defining and groundbreaking as these advancements are, we are just scratching the surface of what AI can do and what it will become.

At this critical juncture, Google partnered with Ipsos to understand global public attitudes on AI, conducting 17,000 interviews across 17 countries. The results are clear: people across the globe see immense promise and opportunity from AI today, tomorrow, and 25 years from now. People across regions believe AI will have tremendous positive impact over time, from speeding up workloads to improving transportation and education to enhancing quality of life. Our data shows they even believe AI

can address pressing challenges such as climate change, poverty, and bias and discrimination, while also making us healthier, smarter, and safer.

As with any new technology, there are some concerns about AI, both for society and for individuals. Resoundingly, however, experiencing AI first hand appears to drive excitement about the boundless opportunities AI can bring—and calm concerns. To capture these opportunities and ensure they are shared and beneficial for all, there is a strong desire for public-private partnership to best deploy and develop AI in a responsible way without dampening the innovation that is so exciting to people around the world.

Hopefully this report can be a helpful contribution to the conversation about AI and its impact on society, the workforce, and individuals as we continue to look towards a future with artificial intelligence.

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Contents.

A promising future with AI.

The reality of today.

Life with AI already looks different. People across the world are experiencing positive changes in the way we access information, manage health, learn, and work. AI's impact feels the most pronounced among the online population outside of the United States and Europe, with the Asia-Pacific region and emerging markets perceiving the most positive impact.
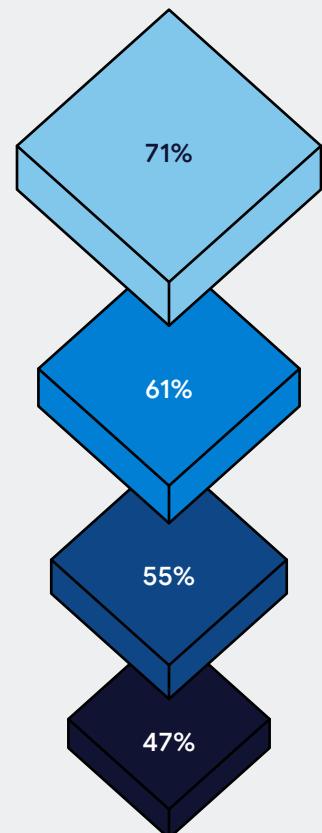
How much positive impact, if any, do you think AI is currently having on:

● United States   ● Europe   ● Asia-Pacific   ○ Emerging
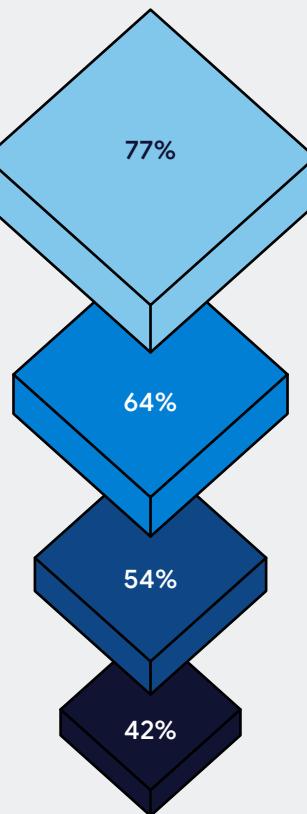
The way we access information
- 77%
- 66%
- 56%
- 51%
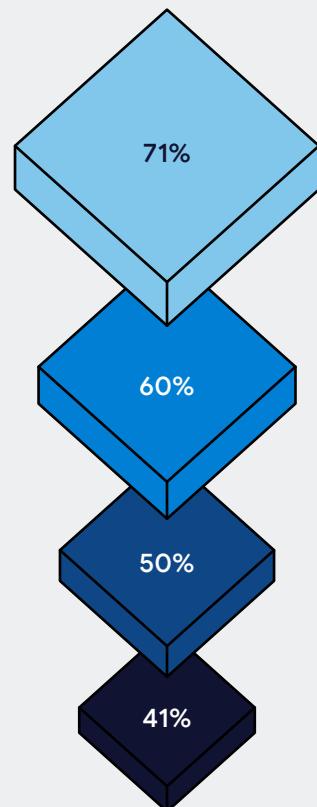
The way we identify and treat diseases
- 71%
- 61%
- 55%
- 47%

The way we learn
- 77%
- 64%
- 54%
- 42%

The way we work
- 71%
- 60%
- 50%
- 41%

Base: all respondents. "Q. How much of an impact, if any, do you think AI is currently having on the following?" Percent selecting "major positive impact" or "minor positive impact."
Europe: Belgium, France, Germany, Netherlands, Poland, Spain, Sweden, and United Kingdom.
Asia-Pacific: Australia, Japan, India, and Singapore.
Emerging: Brazil, South Africa, Mexico, and United Arab Emirates.

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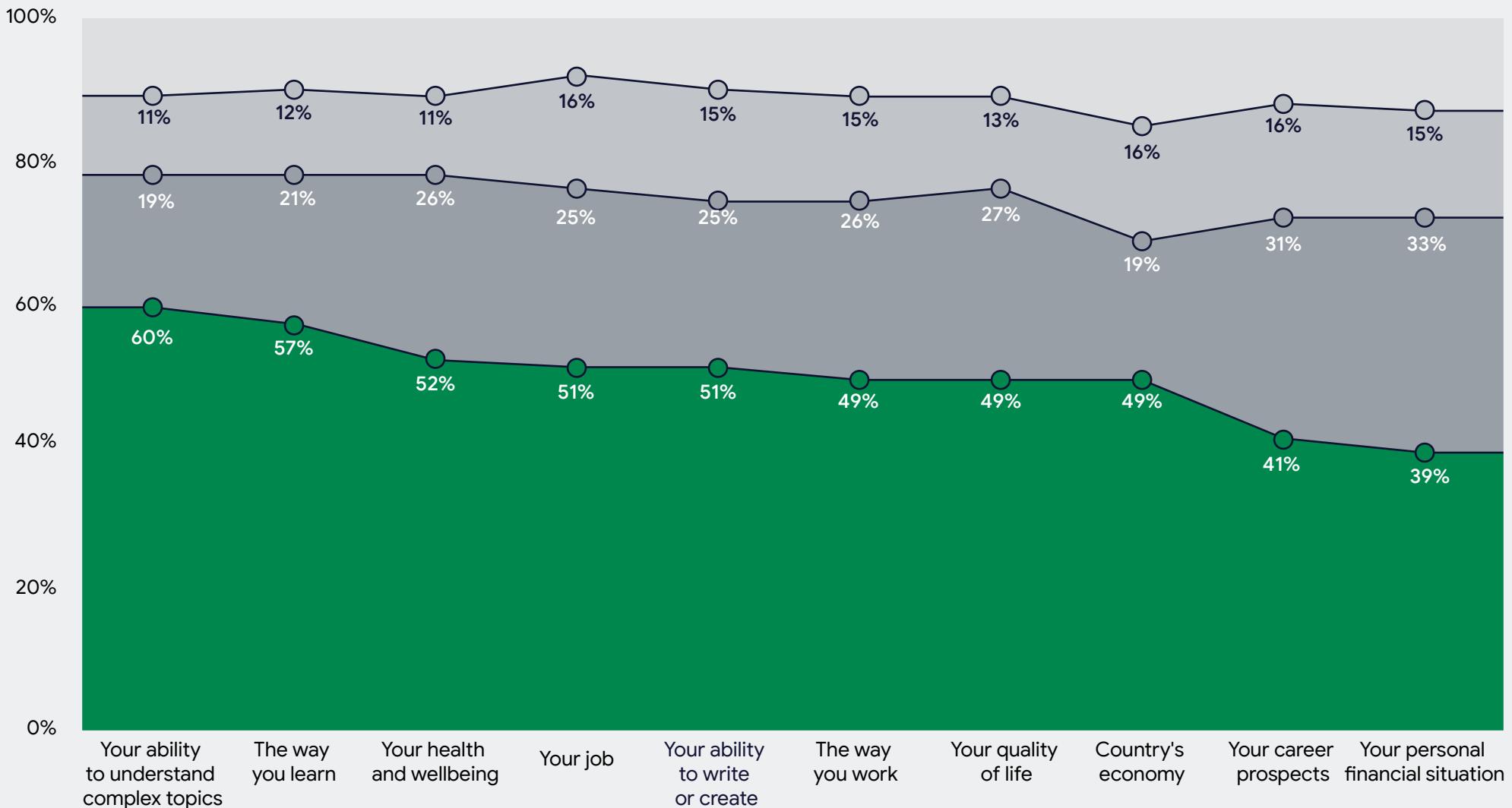
Around the corner.

The impact of AI now and in the short term is personal. Individuals expect to benefit personally from AI in just the next five years:

- More than half (54%) say AI will benefit "people like me"

- Half (52%) expect AI to have a positive impact on their own health and wellbeing

- Nearly two thirds (64%) expect disabled people will benefit from AI in the next five years

- Nearly half (47%) believe AI will benefit underrepresented groups in the next five years

Will AI have a positive, negative, or no impact on each of these areas in the next five years:

● Positive impact   ● No Impact   ● Negative impact   ○ Don't know

Base: all respondents. "Q. Please indicate whether you think AI will have a positive, negative, or no impact on each of these areas in the next five years."

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The promise of tomorrow.
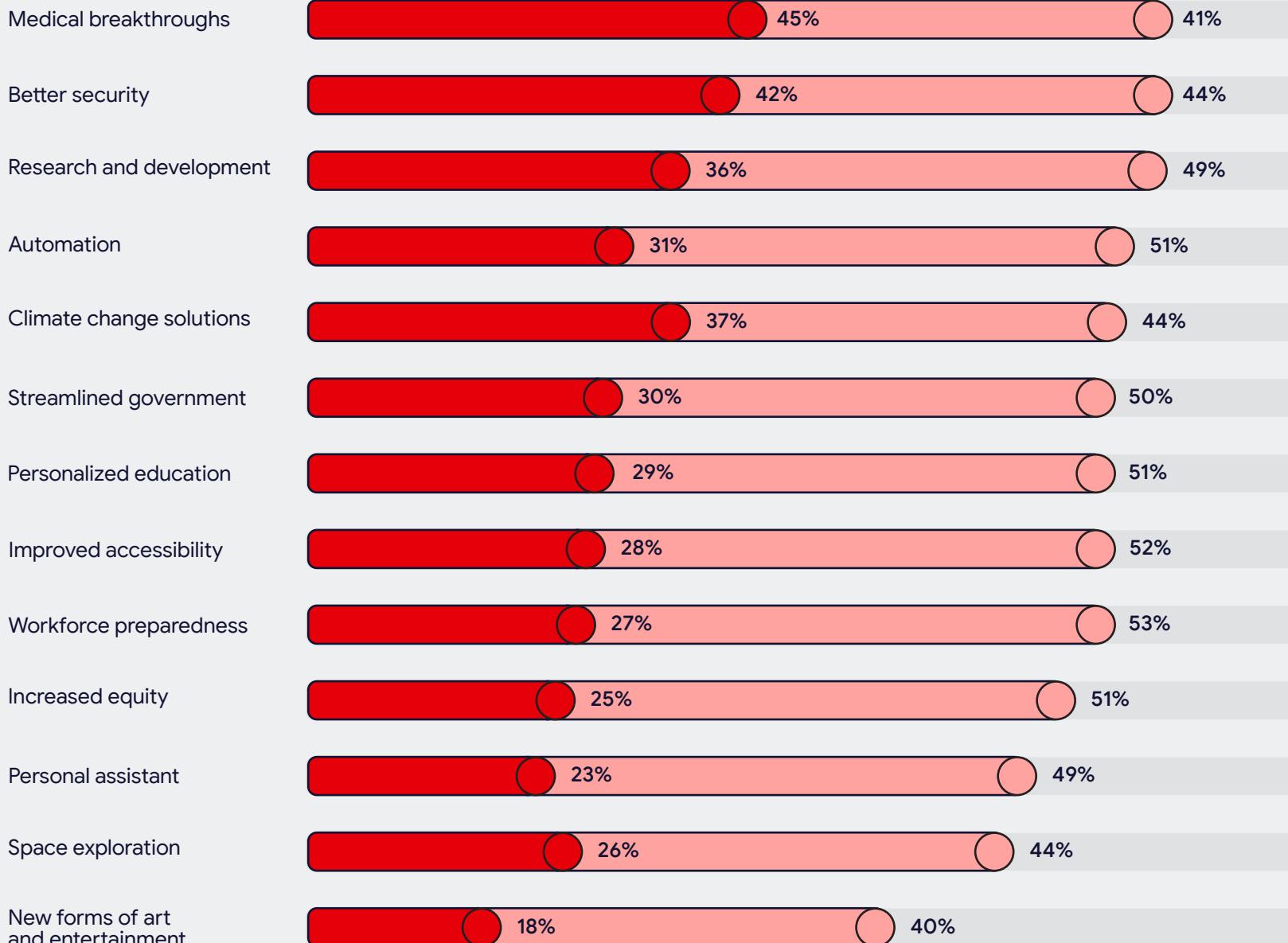
Many in the public see AI as a vehicle to build a healthier, safer, and more knowledgeable world.

Out of a list of potential AI applications, increasing innovation is a clear priority: medical breakthroughs (45% very important), climate change solutions (37%), and R&D (36%) are top priorities and seen as most important for society.

There are also positive perceived implications for AI and security (42% very important). AI making us more secure by detecting fraud, scams, security risks, and other criminal activity and improving response to threats outpaces all other applications except medical breakthroughs as a top application for AI. Maintaining national security and cybersecurity also tops the public's list of government priorities for the next five years (out of a list of six government priorities, from protecting privacy to protecting jobs). The public is looking to the government to harness AI's potential and ensure it is leveraged to protect us from threats and keep us safe.

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How important, if at all, is each AI application for society:

● Very important   ○ Somewhat important

	Very important	Somewhat important
Medical breakthroughs	45%	41%
Better security	42%	44%
Research and development	36%	49%
Automation	31%	51%
Climate change solutions	37%	44%
Streamlined government	30%	50%
Personalized education	29%	51%
Improved accessibility	28%	52%
Workforce preparedness	27%	53%
Increased equity	25%	51%
Personal assistant	23%	49%
Space exploration	26%	44%
New forms of art and entertainment	18%	40%

Base: all respondents. "Q. Here are some ways people think AI might be involved in our lives. For each one, please indicate how important, if at all, you think each one will be for society."

A generation away.

Beyond the near-term benefits, as the public looks ahead to a future with AI 25 years from now, there are many perceived upsides from this emerging technology. In 25 years, more people across the globe believe AI will have a positive impact than a negative impact in every sphere tested, from healthcare to education to addressing poverty and discrimination.

"In sectors like healthcare and education we've not yet seen significant benefits from digital technologies...So I'm particularly excited about the potential for AI to dramatically improve both service and cost in these areas." —United Kingdom

"I'm excited about the breakthroughs in medicine and personal security as well as advancement in the automotive industry." —South Africa

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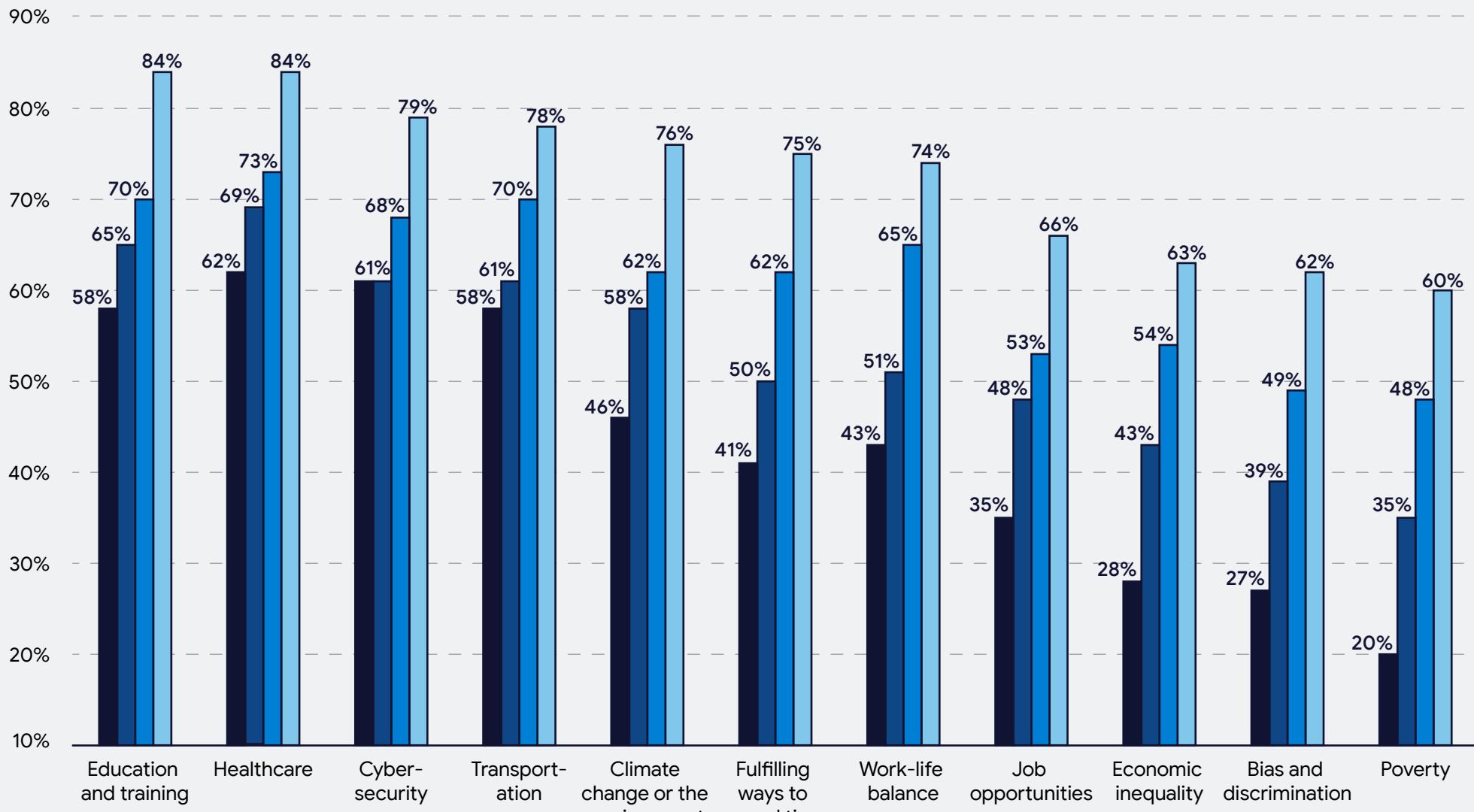
How much total positive impact, if any, in the next 25 years do you think AI will have on:

● United States   ● Europe   ● Asia-Pacific   ○ Emerging

	United States	Europe	Asia-Pacific	Emerging
Education and training	58%	65%	70%	84%
Healthcare	62%	69%	73%	84%
Cyber-security	61%	61%	68%	79%
Transportation	58%	61%	70%	78%
Climate change or the environment	46%	58%	62%	76%
Fulfilling ways to spend time	41%	50%	62%	75%
Work-life balance	43%	51%	65%	74%
Job opportunities	35%	48%	53%	66%
Economic inequality	28%	43%	54%	63%
Bias and discrimination	27%	39%	49%	62%
Poverty	20%	35%	48%	60%

Base: all respondents. "Q. Please indicate whether you think AI will have a positive, negative, or no impact on each of these areas in the next 25 years."
Percent selecting "major positive impact" or "minor positive impact."
Europe: Belgium, France, Germany, Netherlands, Poland, Spain, Sweden, and United Kingdom.
Asia-Pacific: Australia, Japan, India, and Singapore.
Emerging: Brazil, South Africa, Mexico, and United Arab Emirates.

Experiencing is believing.

Using AI contributes to greater excitement and less concern about a future with AI overall.

More educated and affluent respondents report greater levels of excitement about the possibilities of AI (57% excited among higher educated and 55% excited among higher-income respondents), and at the same time are more likely to have used AI or discussed AI's implications in the workplace. Among those respondents who report using an AI application in the last year (38%), a majority (68%) is excited about the possibilities of AI. Those with no recent experience with an AI program are less likely to report excitement (38%) and more likely to express concern about AI (61%). They are also less likely to feel AI is having a positive impact.

Talking about or using AI at work—from casual conversations with coworkers about AI to formal announcements from leadership to AI tools provided as an option for staff use—also has clear correlations to attitudes about AI. In the United States, for example, 36% of workers say they have used or talked about AI at work, and 33% of Americans are excited about AI overall. In Germany, by comparison, 62% of workers have used or talked about AI at work, and 47% of Germans are excited about AI. In Brazil, 75% of workers have used or talked about AI at work, and 60% of Brazilians are excited about AI.

Younger people also express greater optimism about AI than older respondents (Gen Z: 59% excited vs. 37% among Baby Boomers). Men are also more likely to be excited about AI (54%) than women (45%) overall. Age and gender are also correlated with AI usage: 43% of men across countries have used an AI application in the last 12 months, compared to 33% of women, and 58% of Gen Z have used AI, compared to just 18% of Boomers.

How much total positive impact do you think AI is currently having on:

Have used AI ●   **The way we:**   ● Have not used AI

	The way we:	
77%	Access information	55%
74%	Learn	53%
71%	Work	48%
71%	Identify and treat diseases	53%
64%	Keep information and systems secure	43%

Base: all respondents. "Q. How much of an impact, if any, do you think AI is currently having on the following? and "Q. In the last twelve months, have you used any of the following? An AI application such as ChatGPT or Bard." Percent selecting "major positive impact" or "minor positive impact."

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Positive workforce disruption.

Clear upsides for workers.

Across countries, some workers say AI is already having an impact on their jobs, allowing them to work faster or more efficiently.
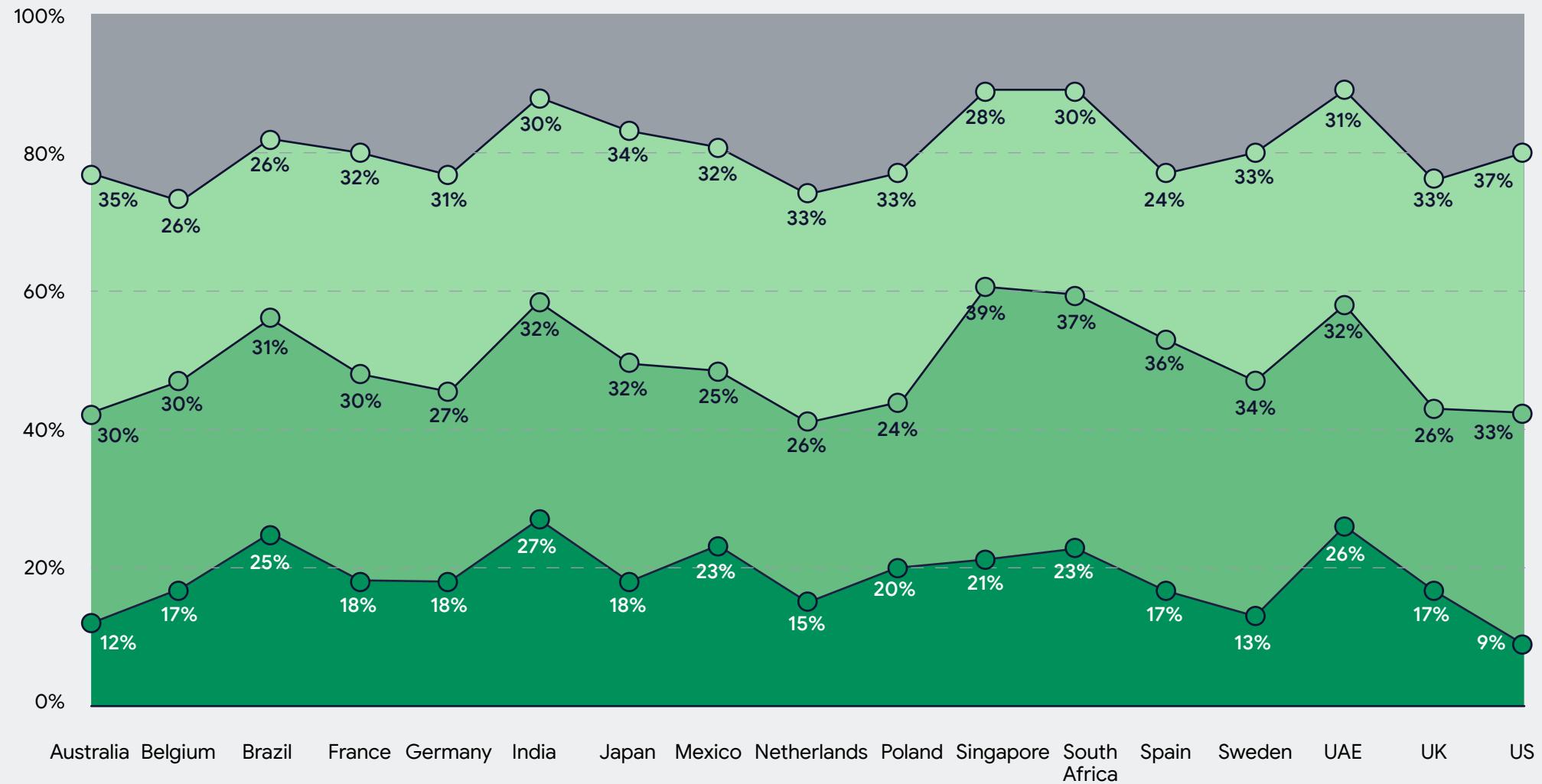
In five years, workers believe AI will have an even bigger positive impact on how they work:

- 51% say AI will have a positive impact on their job (25% no impact / 16% negative impact / 8% don't know) in 5 years

- 39% of workers who believe AI will impact their job or industry believe they will accomplish the same tasks in less time in 5 years

- 34% of workers who believe AI will impact their job or industry believe their work will be easier in 5 years

A majority of blue collar workers (55%) expect positive changes from AI, as do nearly three quarters (68%) of white collar workers.

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AI job impact: Will AI allow you to do job faster or more efficiently?

● Yes, already   ○ Yes, in next five years   ○ Yes, in more than five years   ○ No, AI will not

Challenges, risks, and rewards for the workforce.
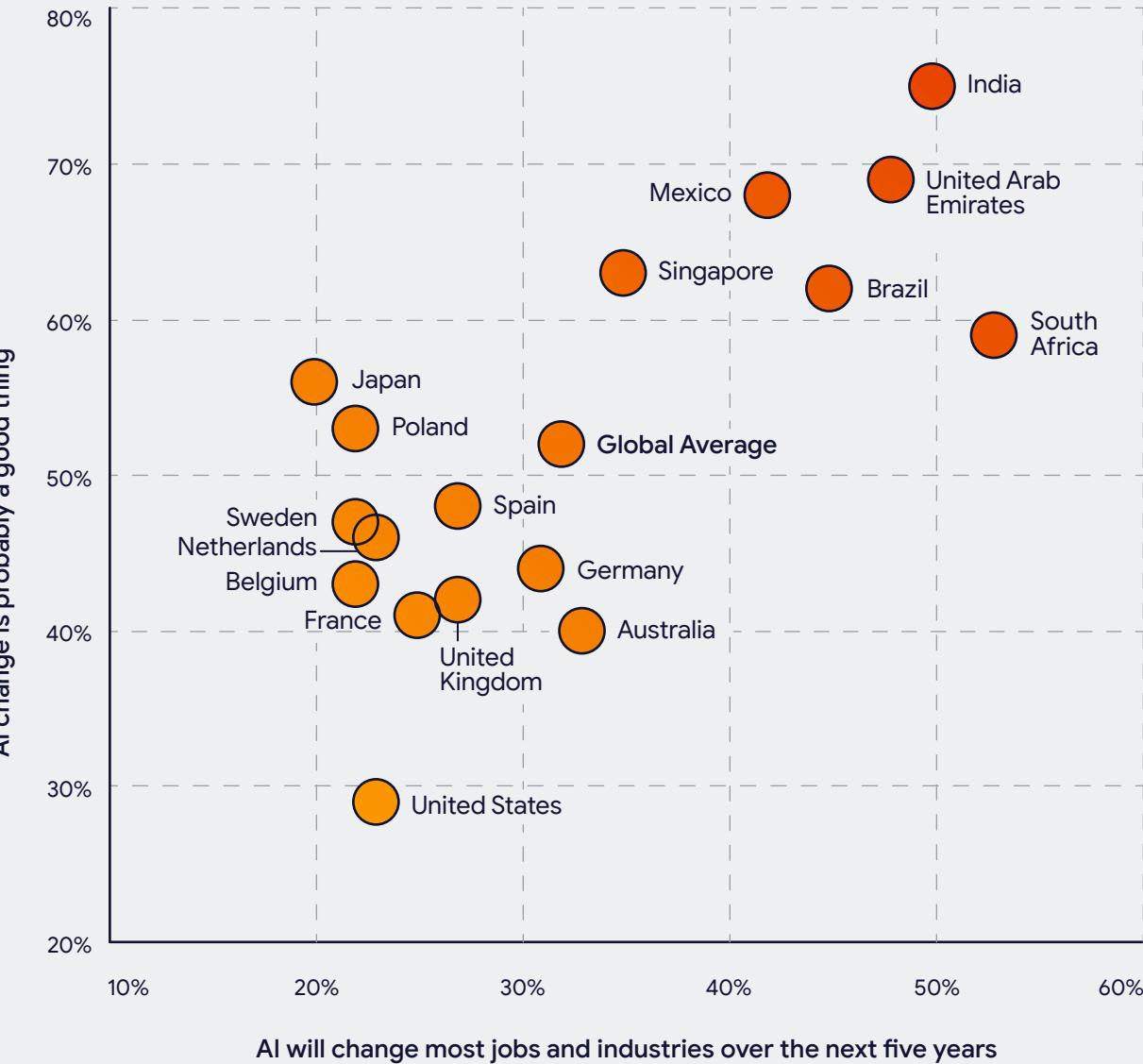
Across countries and regions, workers who believe AI will impact their job or their industry identify two main issues in adapting to life with AI: learning how to use the technology and potential job displacement. Nearly 1 in 5 of these workers (19%) say they will have to find an entirely new industry or role to work in in the next 5 years as a result of AI, and 44% expect they will have to learn how to use AI for their jobs.

Respondents' self-projected displacement is highest among those without a college degree (21%), and lower income workers (22%). Workers under 35 (21%) and workers 35-49 (19%) are more likely to say they will need to find a new industry or role to work in than those over age 50 (15%).

In each of the 17 countries we surveyed, over 8 in 10 believe AI will change some or most jobs or industries in the next five years. Of those who believe AI will change jobs or industries, a majority (52%) feel that change will likely be a good thing, and 17% remain uncertain. Countries where respondents are most likely to think AI will change most jobs and industries in the next 5 years, such as India and South Africa, also tend to be the most positive about that change, with more saying changes in jobs and industries as a result of AI in the next five years are "probably a good thing" (75% India / 59% South Africa).

> "I am excited to see the positive change in society with increased cybersecurity and increased job opportunities." —India

> "I'm most excited to see how AI can be used by people in a more collaborative way. I.e., AI not taking over jobs or completely automating systems but being used by the people in those jobs to spark creativity and streamline some processes." —Australia

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Perceived job change X perceived positive impact of job change:

AI change is probably a good thing (vertical axis)

AI will change most jobs and industries over the next five years (horizontal axis)

Data points: India, United Arab Emirates, Mexico, Singapore, Brazil, South Africa, Japan, Poland, Global Average, Sweden, Netherlands, Belgium, France, United Kingdom, Spain, Germany, Australia, United States

Horizontal axis – Base: all respondents. "Q. Do you think AI… will change most jobs and industries over the next five years." Vertical axis – Base: Think AI will change some/most jobs. "Q. You indicated you think AI will change jobs and industries over the next five years. In your opinion, is that…"

Innovation *and* responsibility.
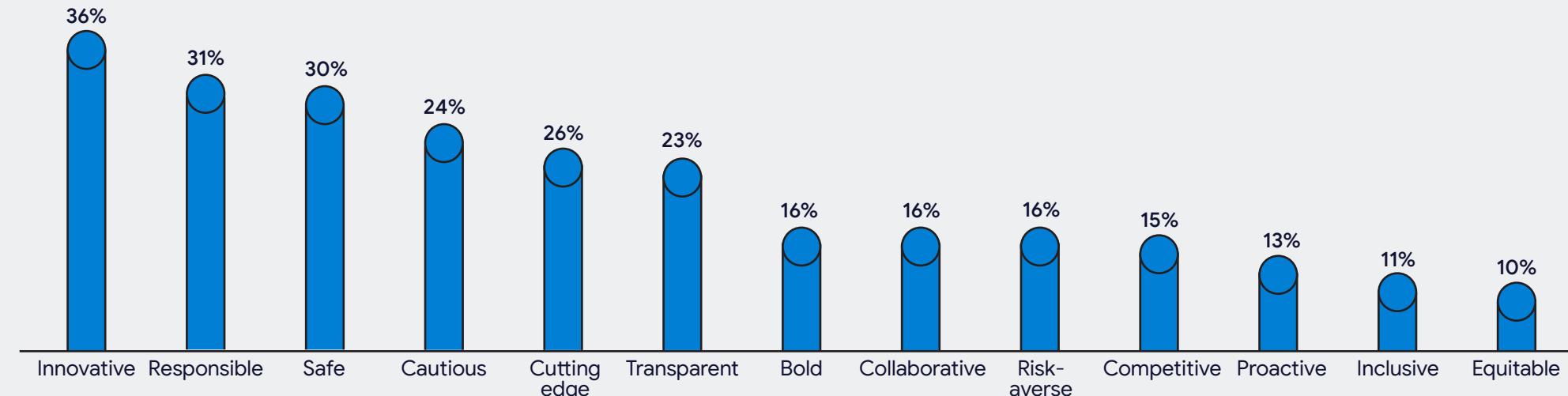
Innovation and...
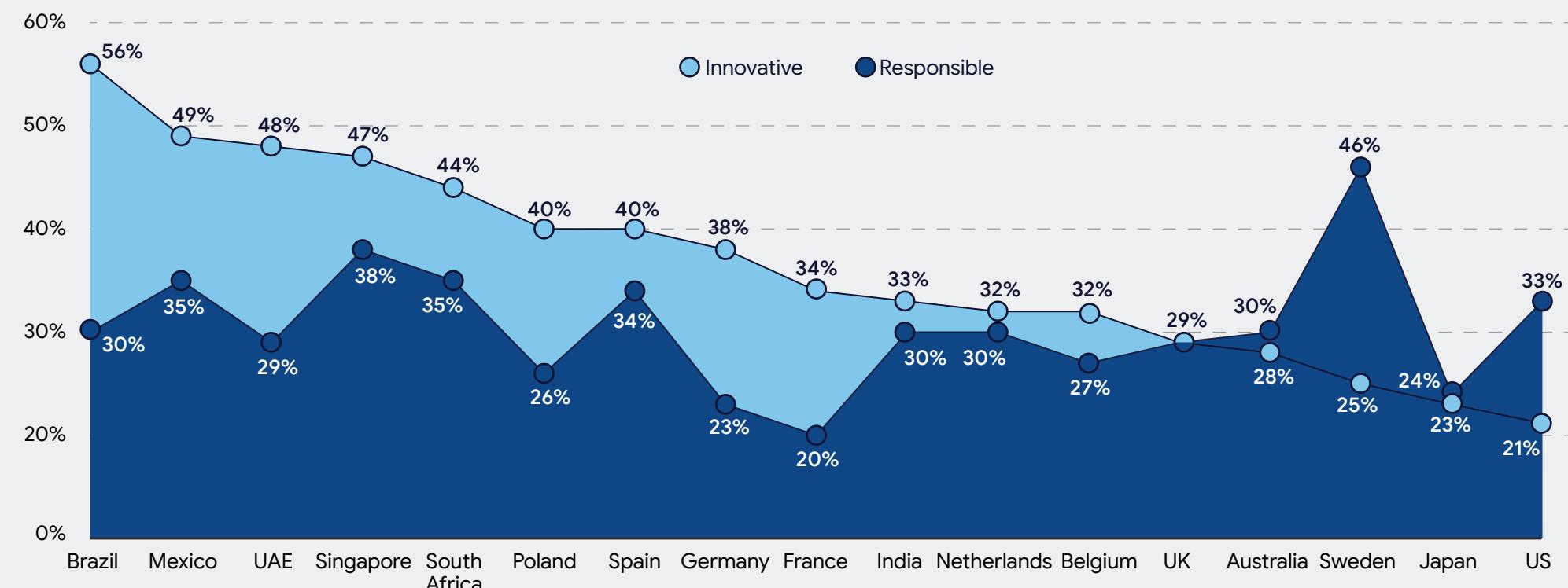
Continuing to innovate as AI develops is a clear priority. However, while innovation tops the list of desired AI approaches, innovation is followed by three words: "responsible," "safe," and "cautious."

Countries that are most likely to gravitate to an "innovative" approach include Brazil (56%), Mexico (49%), the United Arab Emirates (48%), and Singapore (47%). Sweden (46%), Singapore (38%), and South Africa (35%) are among the countries most likely to emphasize "responsible" alongside "innovative."

Word or phrase best describing preferred AI integration approach:

Innovative	Responsible	Safe	Cautious	Cutting edge	Transparent	Bold	Collaborative	Risk-averse	Competitive	Proactive	Inclusive	Equitable
36%	31%	30%	24%	26%	23%	16%	16%	16%	15%	13%	11%	10%

Country breakdown of two most frequently selected words:
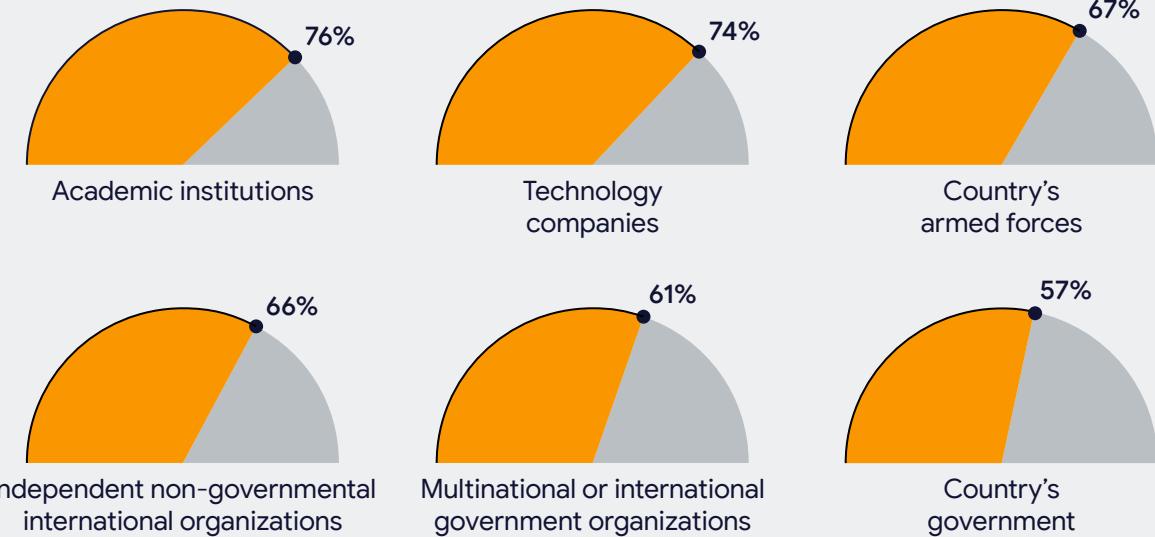
○ Innovative   ● Responsible

	Brazil	Mexico	UAE	Singapore	South Africa	Poland	Spain	Germany	France	India	Netherlands	Belgium	UK	Australia	Sweden	Japan	US
Innovative	56%	49%	48%	47%	44%	40%	40%	38%	34%	33%	32%	32%	29%	30%	25%	23%	21%
Responsible	30%	35%	29%	38%	35%	26%	34%	23%	20%	30%	30%	27%	29%	28%	46%	24%	33%

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Tech companies, governments, and society—together.

There is widespread agreement on the importance of public-private partnership to responsibly harness the opportunity AI brings. Three-fourths of those surveyed (78%) agree that "government and technology companies should work together to oversee the development of AI." There is similar agreement among the global public that government and tech companies should work together to ensure everyone is able to access (74%) and benefit from (77%) advancements in AI.

It is clear that the public expects various sectors of society to come together at this critical moment for AI. Even at a time when trust in government and institutions is historically low, academic institutions, branches of government, NGOs, and tech companies are all trusted to help oversee AI development overall.

Total confidence in the following sectors to oversee the development of AI in the best interest of the public:

76%
Academic institutions

74%
Technology companies

67%
Country's armed forces

66%
Independent non-governmental international organizations

61%
Multinational or international government organizations

57%
Country's government

Base: all respondents. "Q. How much confidence do you have, if any, in the following to oversee the development of AI in the best interest of the public?" Percent selecting "total confidence," "a lot of confidence," or "some confidence."

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Methodology.

These are findings from a survey conducted by Ipsos between October 19-November 6, 2023, on behalf of Google. For this survey, a sample of roughly 1,000 adults 18+, representative of the general population of each in Australia, Belgium, France, Germany, Japan, the Netherlands, Poland, Singapore, Spain, Sweden, and the United Kingdom were interviewed online using Ipsos online panels. Survey samples of roughly 1,000 adults 18+ representative of the online population of each in Brazil, India, Mexico, South Africa, and United Arab Emirates were also interviewed using Ipsos online panels. A sample of 1,034 adults age 18+ who are residents of the United States were interviewed online via the KnowledgePanel®. The survey has a credibility interval of plus or minus 3.8 percentage points for all respondents in each country.

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