GLOBAL VIEWS ON A.I. 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

Ipsos

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 live 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.

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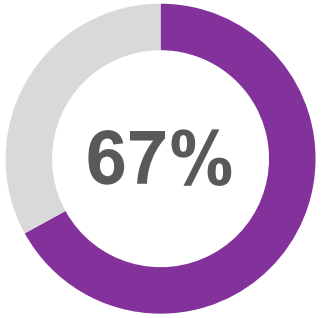
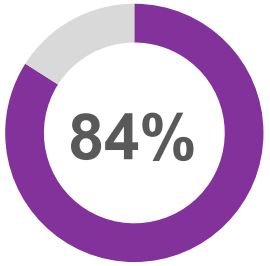
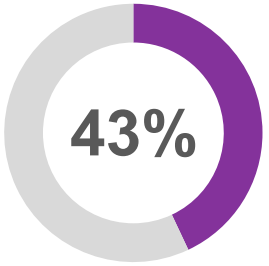
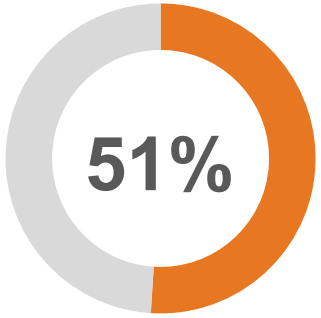
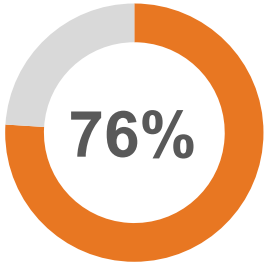
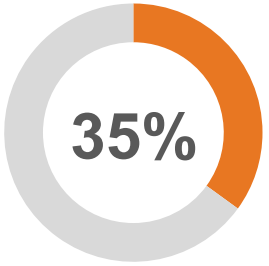
Understanding of AI

Understanding of AI

% agree (31 country-average)		Change since Dec. 2021	Highest	Lowest
	I have a good understanding of what artificial intelligence is	+3 ppt	 Indonesia	 Japan
	I know which types of products and services use artificial intelligence	+1 ppt	 Indonesia	 Belgium, New Zealand, USA

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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.
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Understanding of AI

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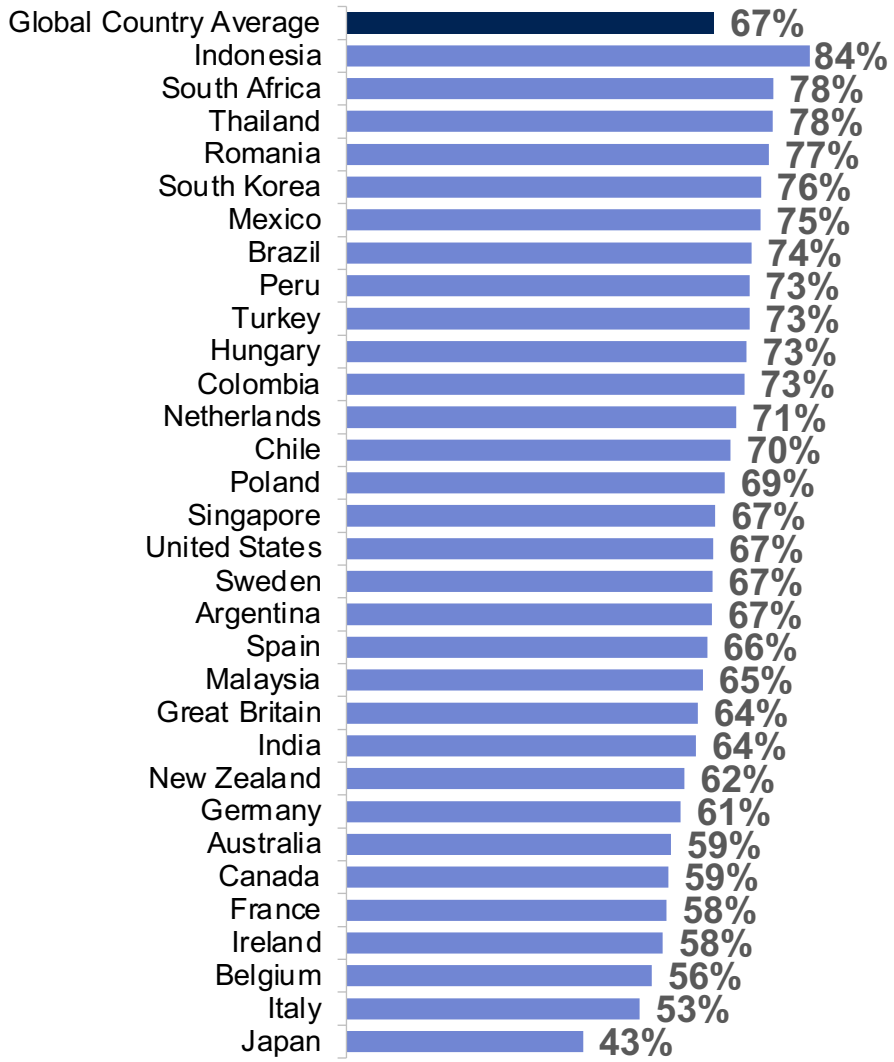
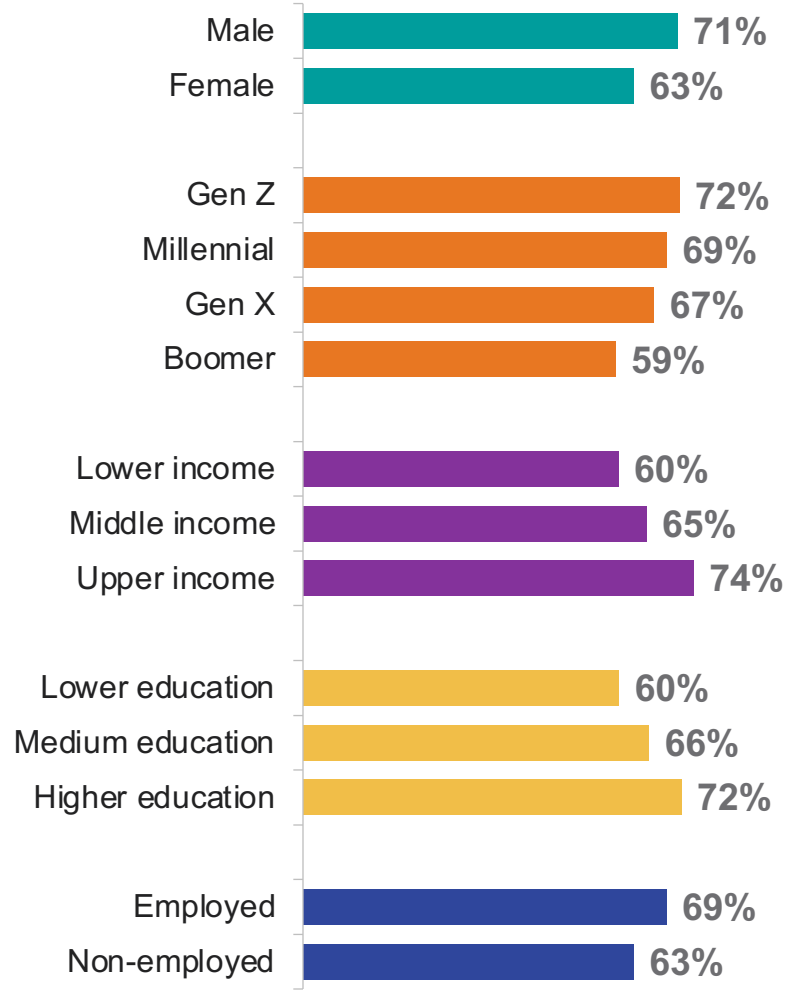
I have a good understanding of what artificial intelligence is

% Agree (very/somewhat)





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Understanding of AI

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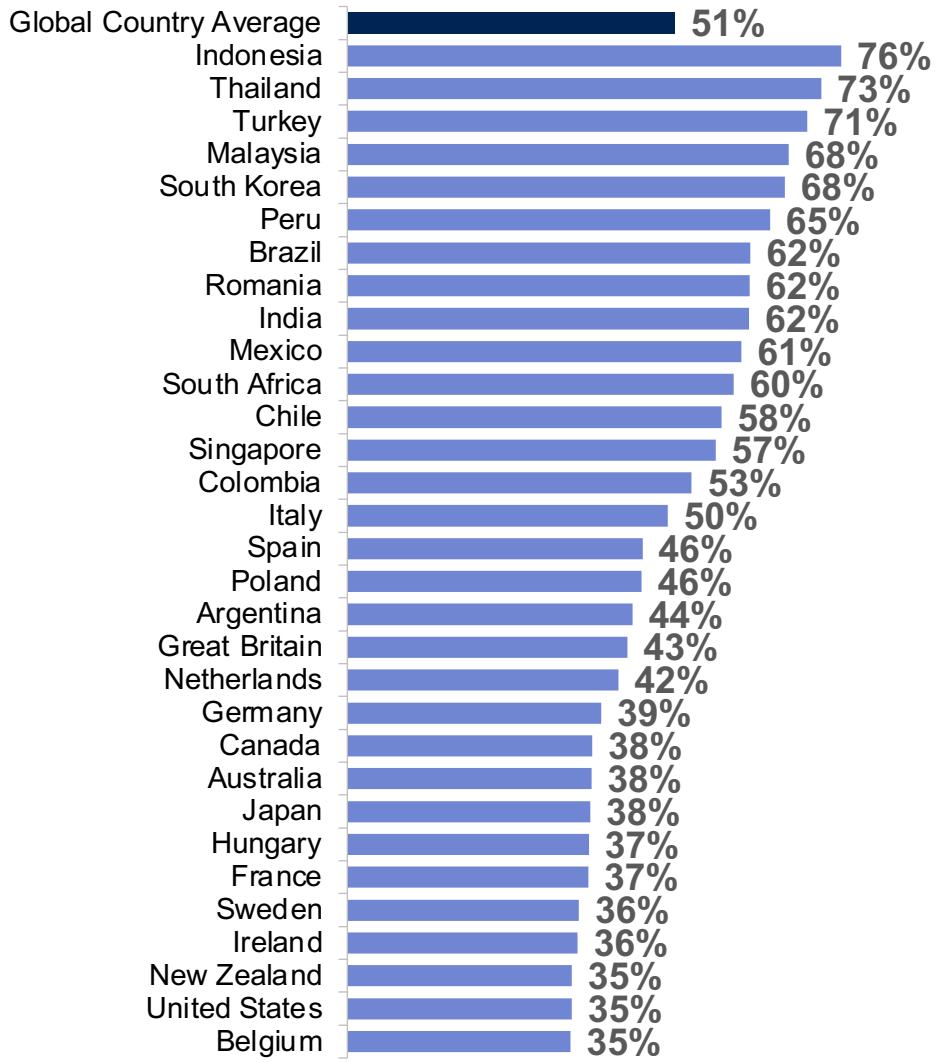
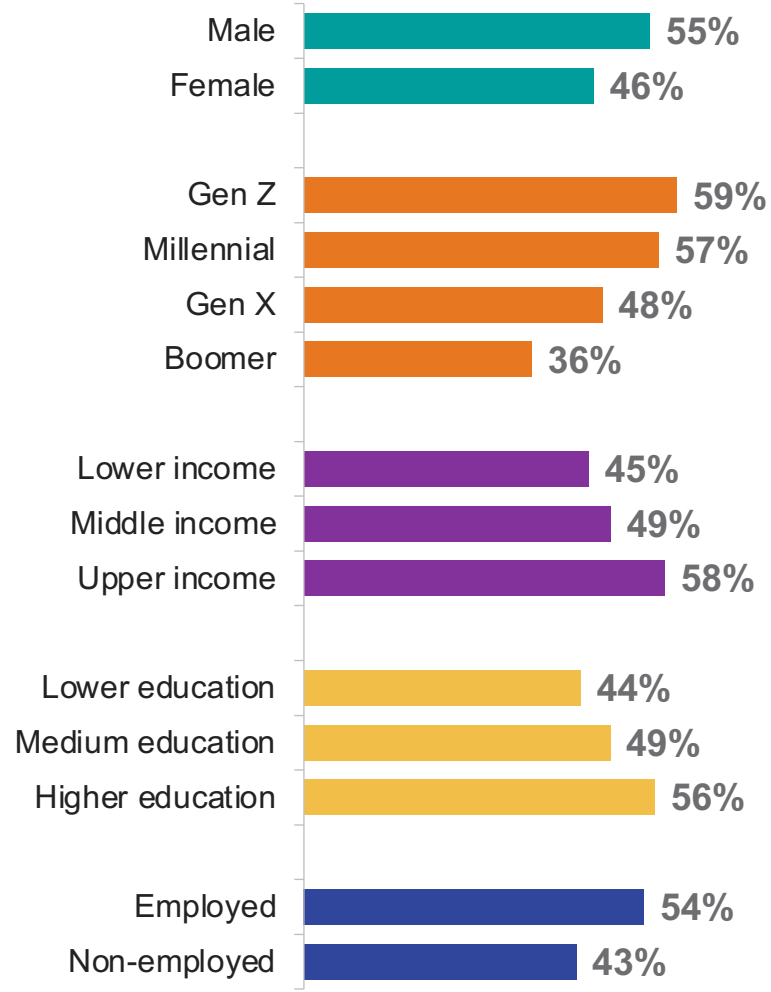
I know which types of products and services use artificial intelligence

% Agree (very/somewhat)





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2

Feelings about AI

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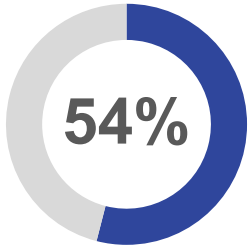
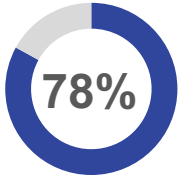
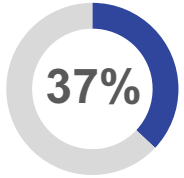
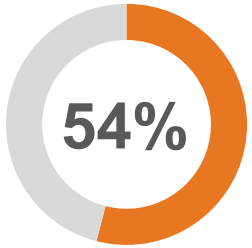
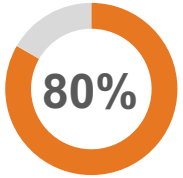
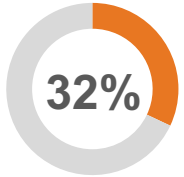
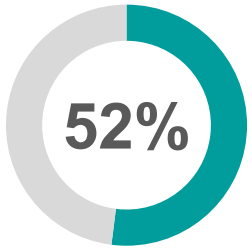
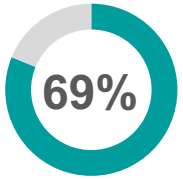
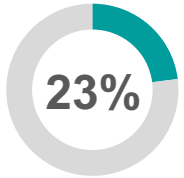
	Products and services using artificial intelligence have more benefits than drawbacks	+3 ppt	 Indonesia	 France, USA
	Products and services using artificial intelligence make me excited	N/A	 Thailand	 Sweden
	Products and services using artificial intelligence make me nervous	+12 ppt	 Australia	 Japan

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Feelings about AI

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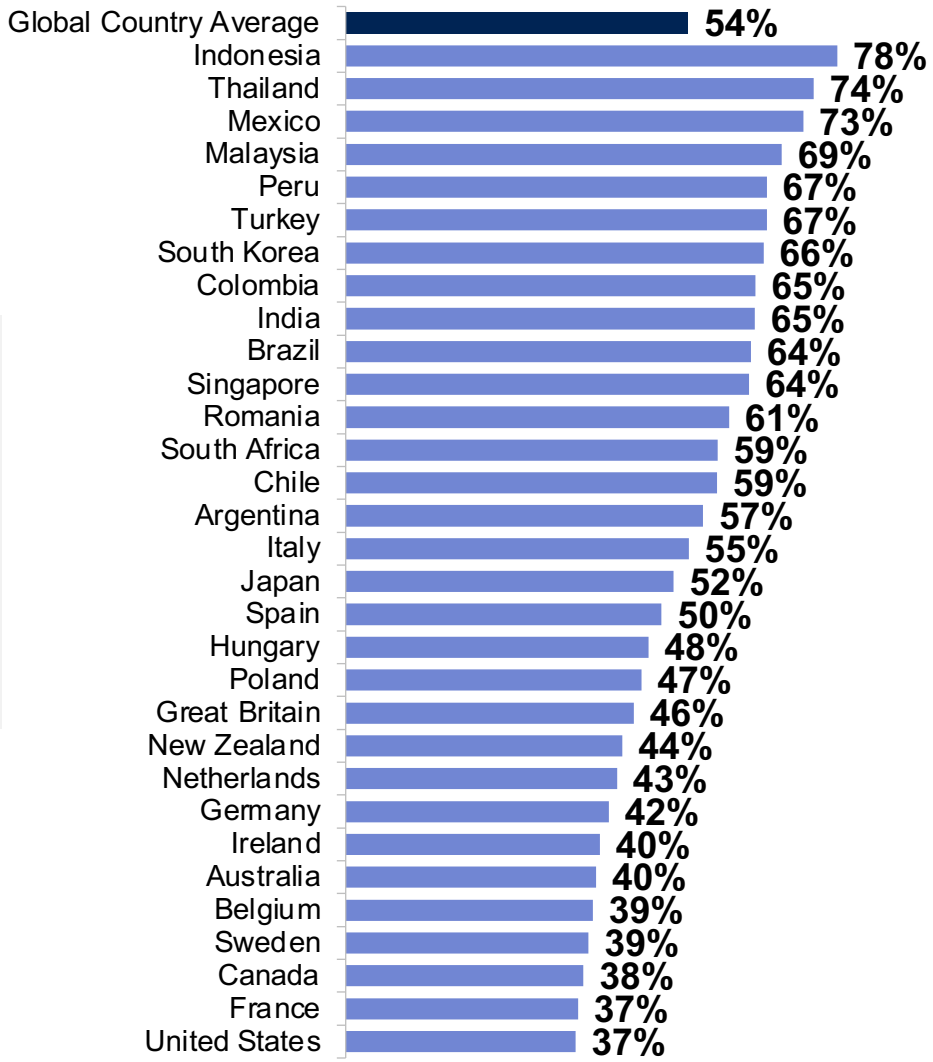
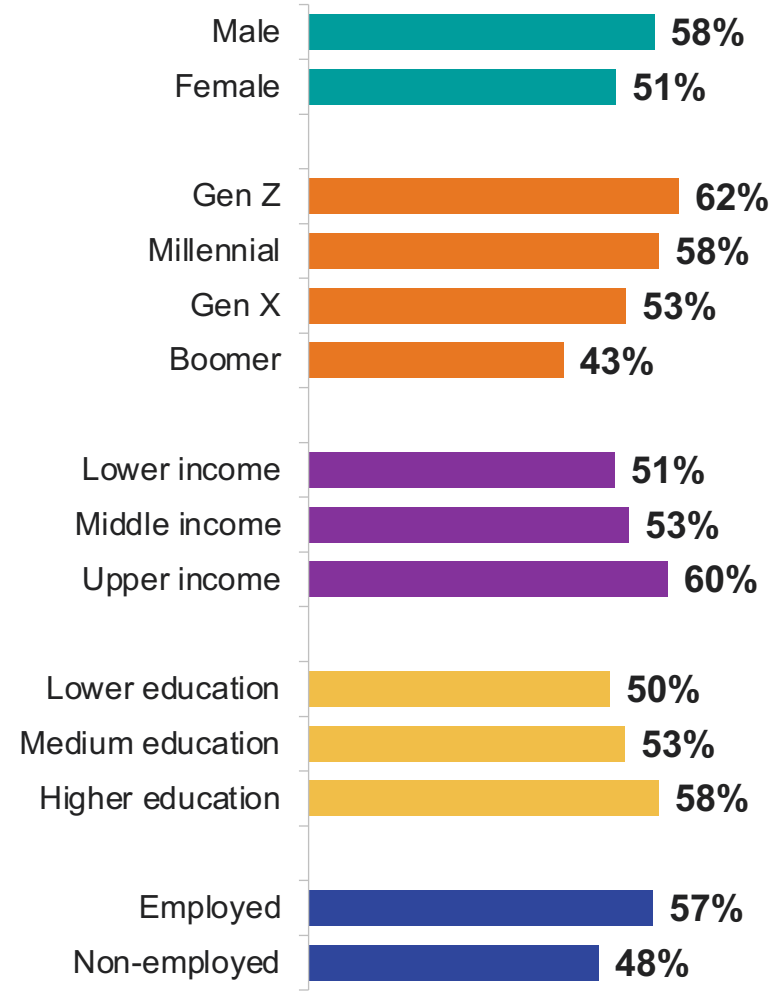
% Agree (very/somewhat)





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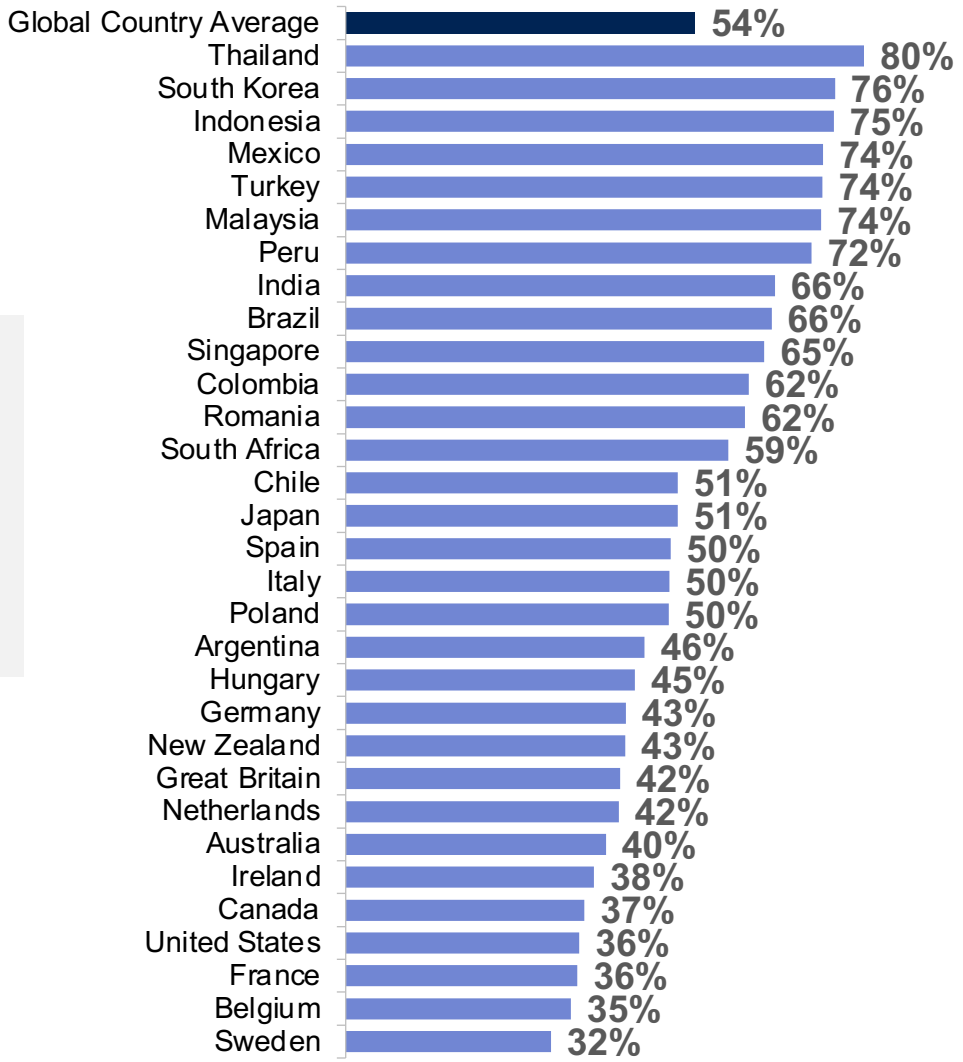
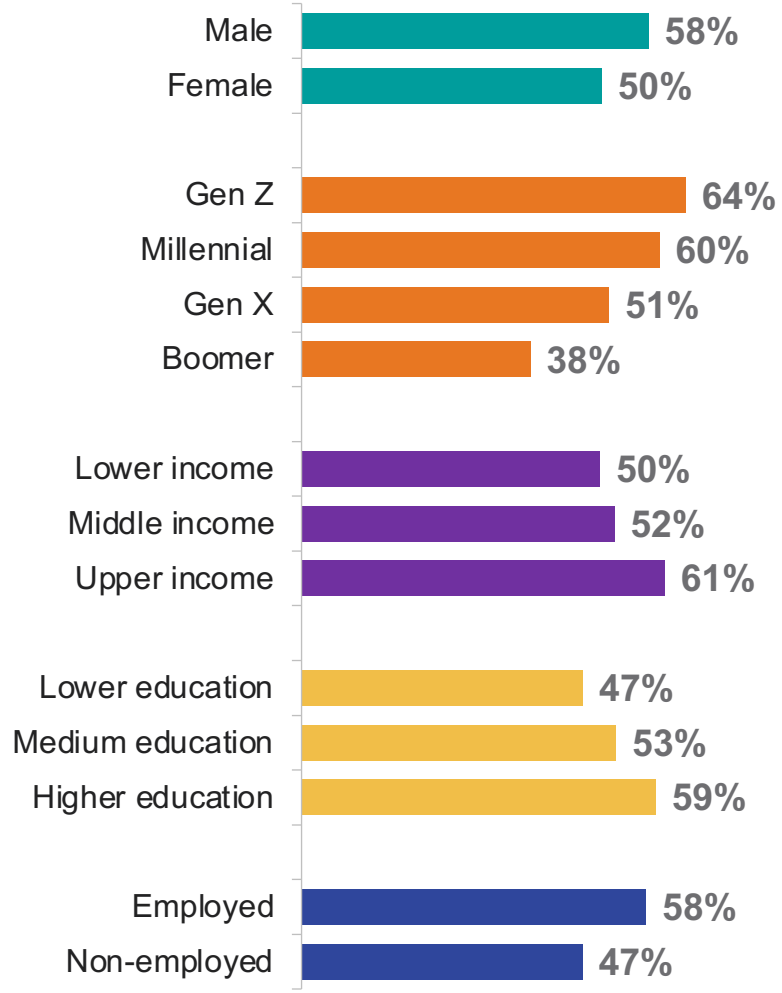
Products and services using artificial intelligence make me excited

% Agree (very/somewhat)





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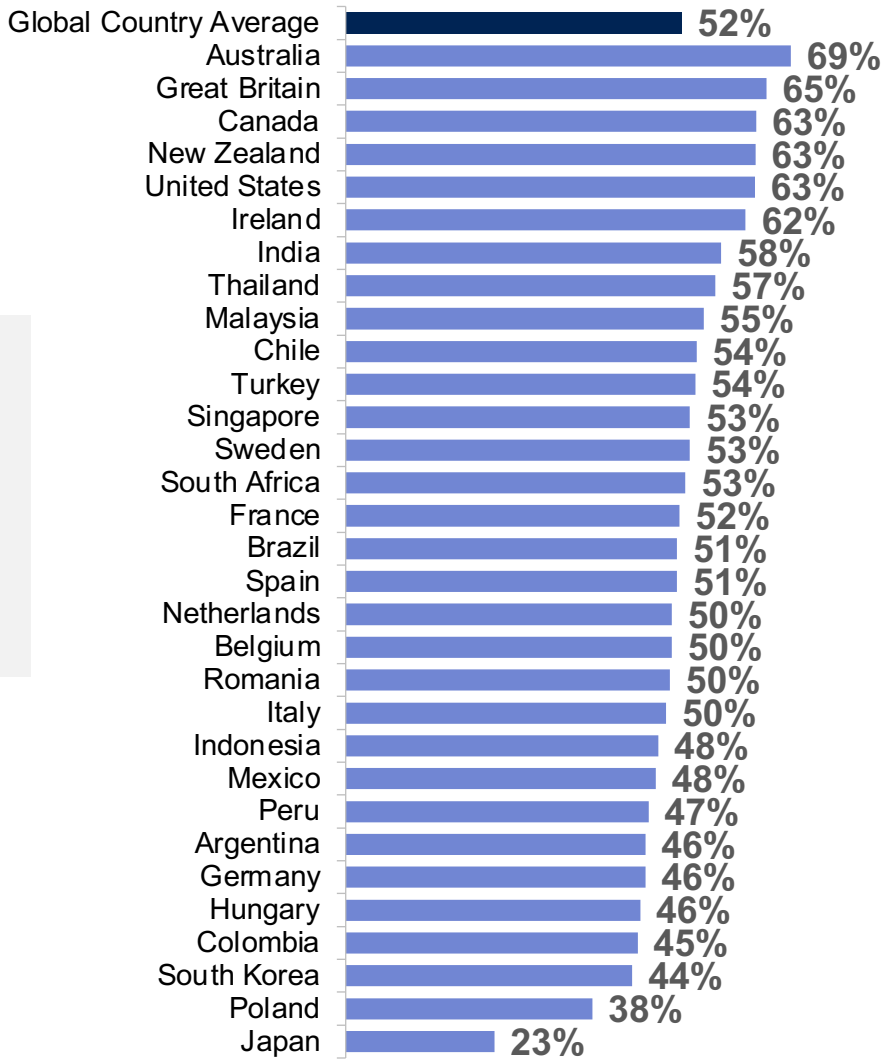
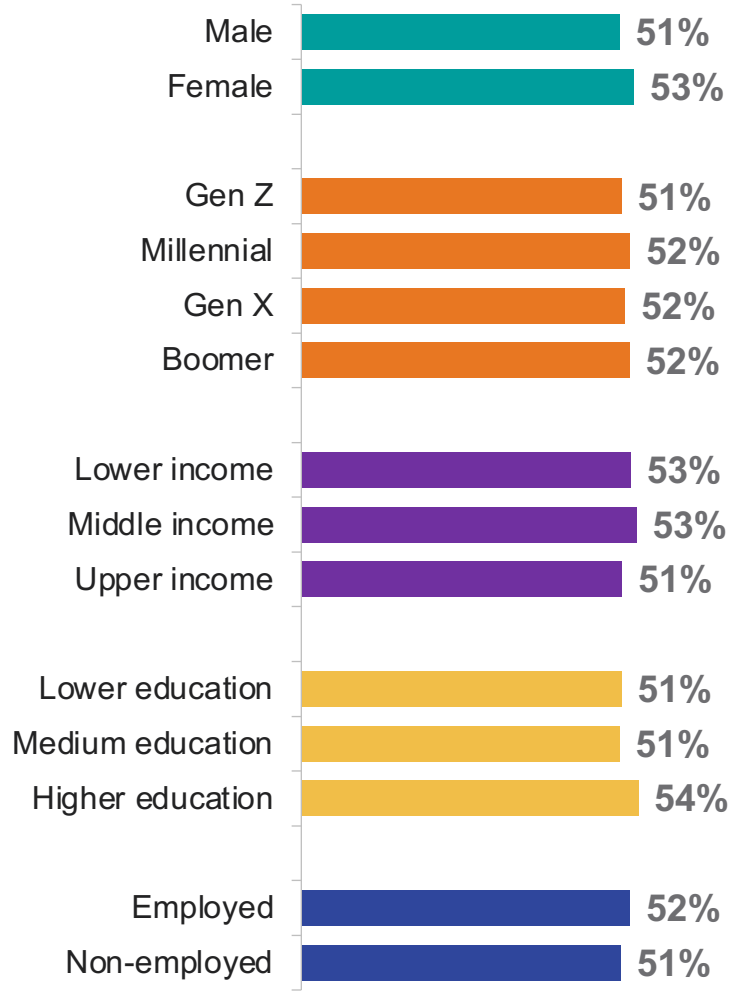
% Agree (very/somewhat)





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Trust in AI

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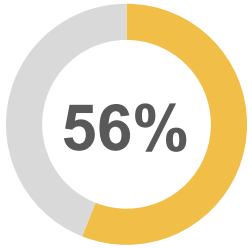
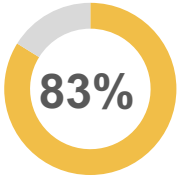
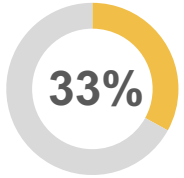
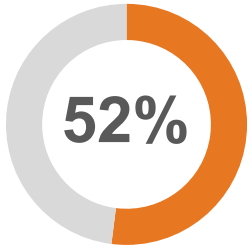
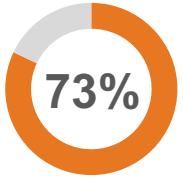
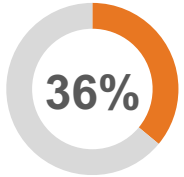
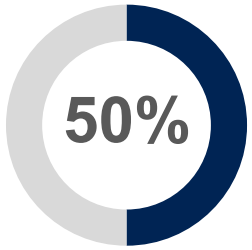
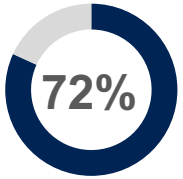
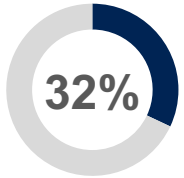
	I trust artificial intelligence to not discriminate or show bias towards any group of people	N/A	 Thailand	 Sweden
	I trust companies that use artificial intelligence as much as I trust other companies	+3 ppt	 Thailand	 USA
	I trust that companies that use artificial intelligence will protect my personal data	N/A	 Thailand	 France, Japan, USA

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Trust in AI

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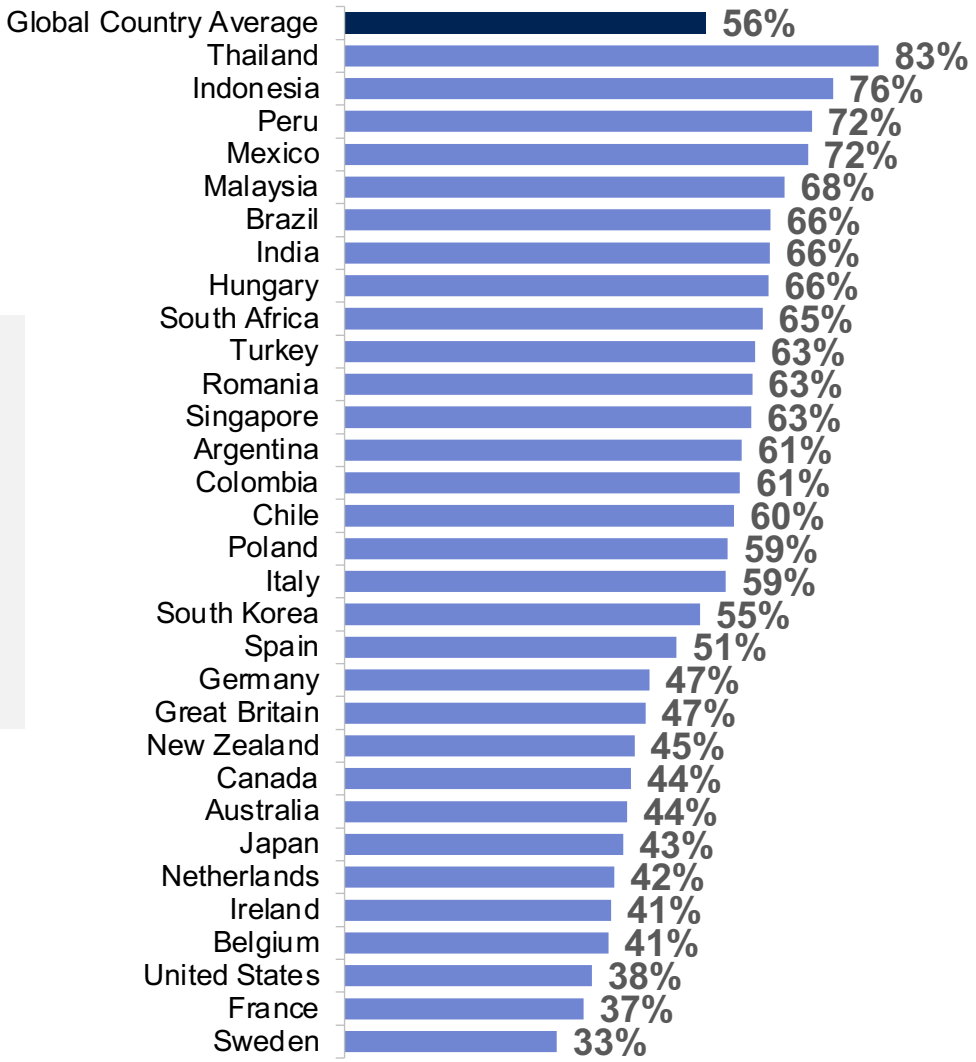
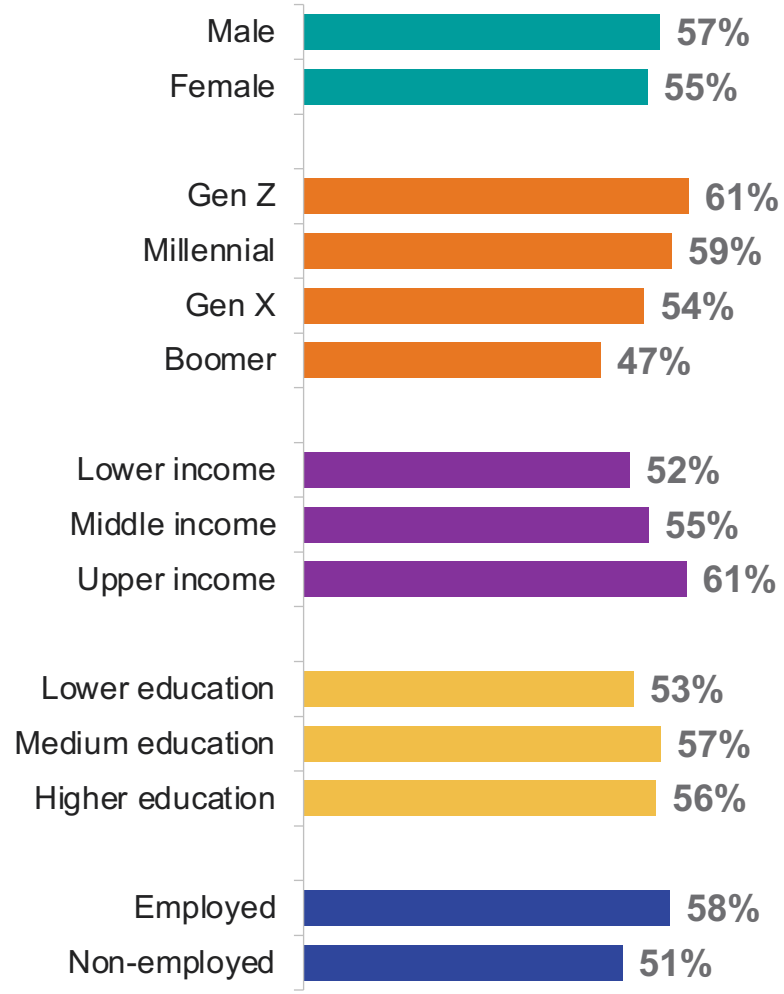
% Agree (very/somewhat)





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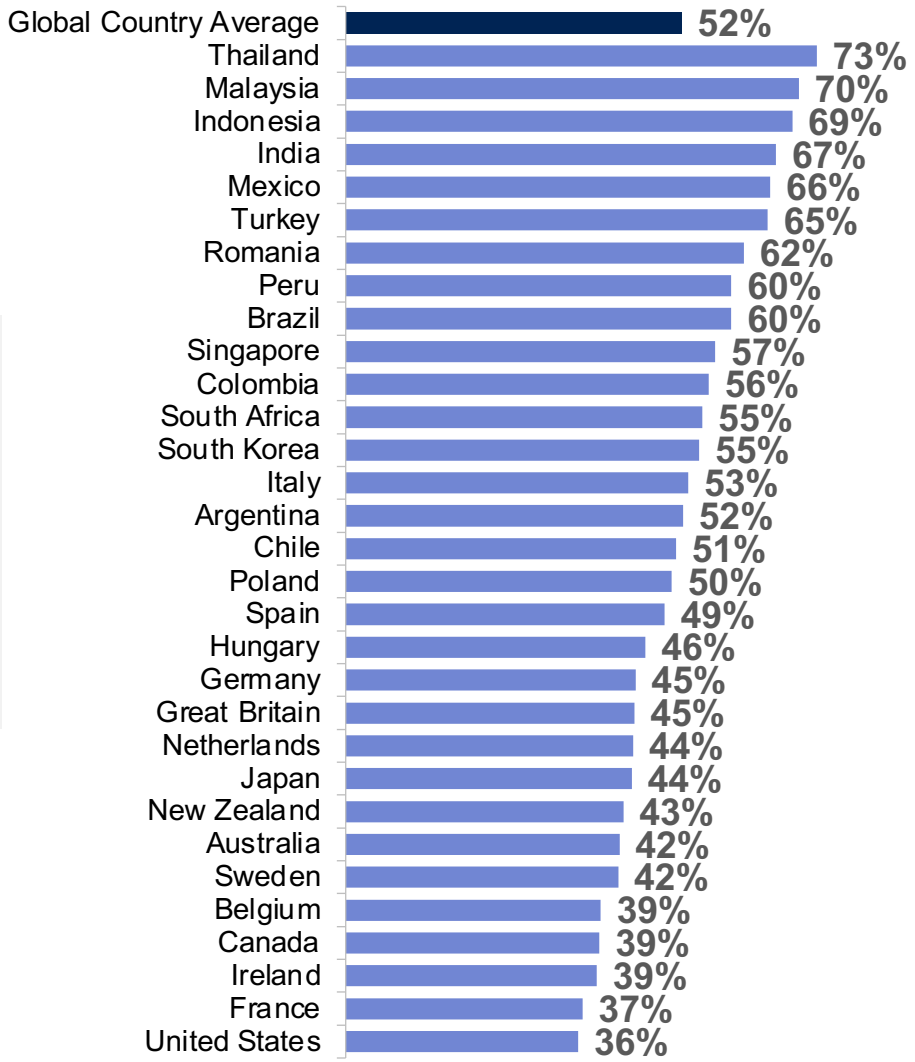
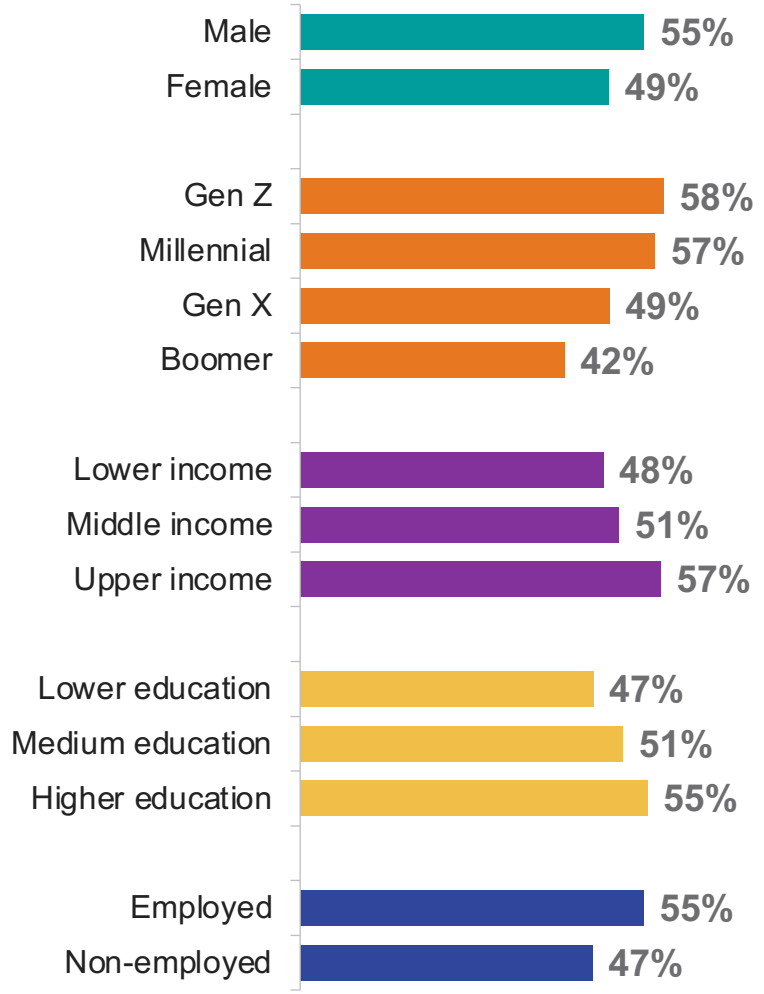
% Agree (very/somewhat)





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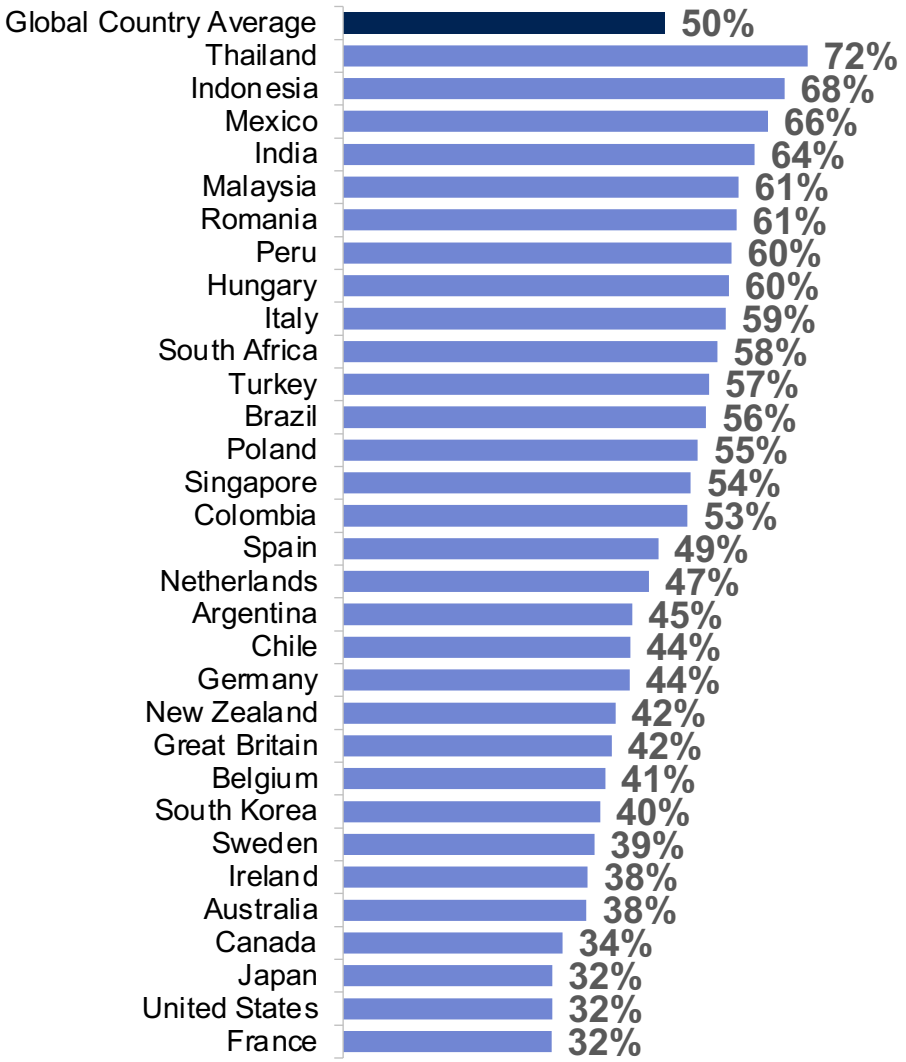
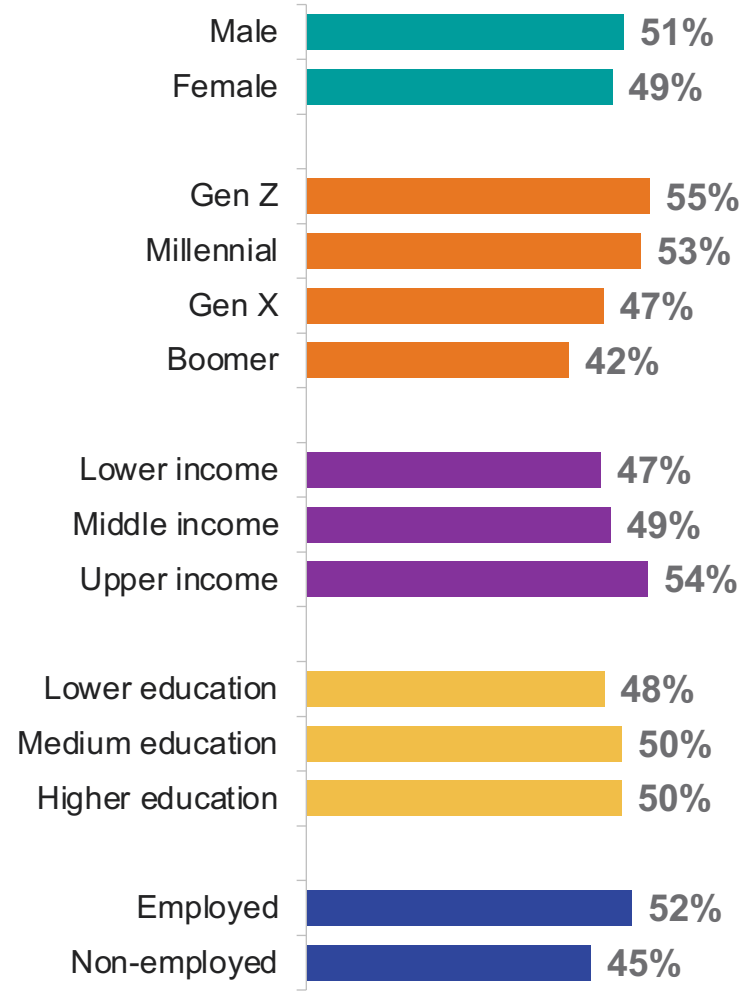
Trust in AI

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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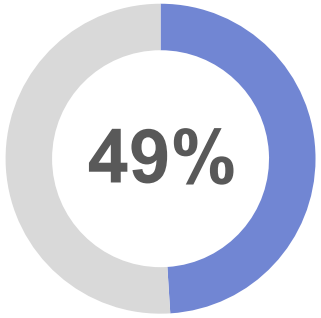
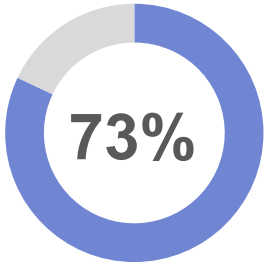
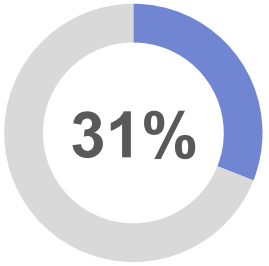
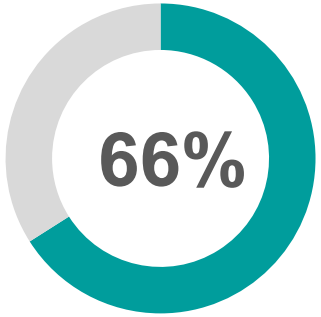
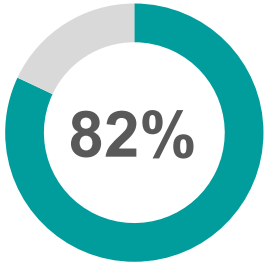
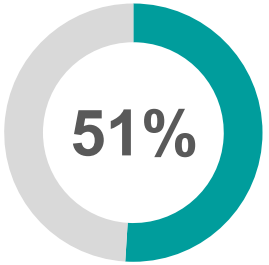
4

AI impact on one’s daily life and job

AI impact on one's daily life

% agree (31 country-average)		Change since Dec. 2021	Highest	Lowest
	Products and services using artificial intelligence **have** profoundly **changed** my daily life in the **past** 3-5 years	+1 ppt	 South Korea	 Belgium, Ireland, Sweden
	Products and services using artificial intelligence **will** profoundly **change** my daily life in the **next** 3-5 years	+7 ppt	 South Korea	 France

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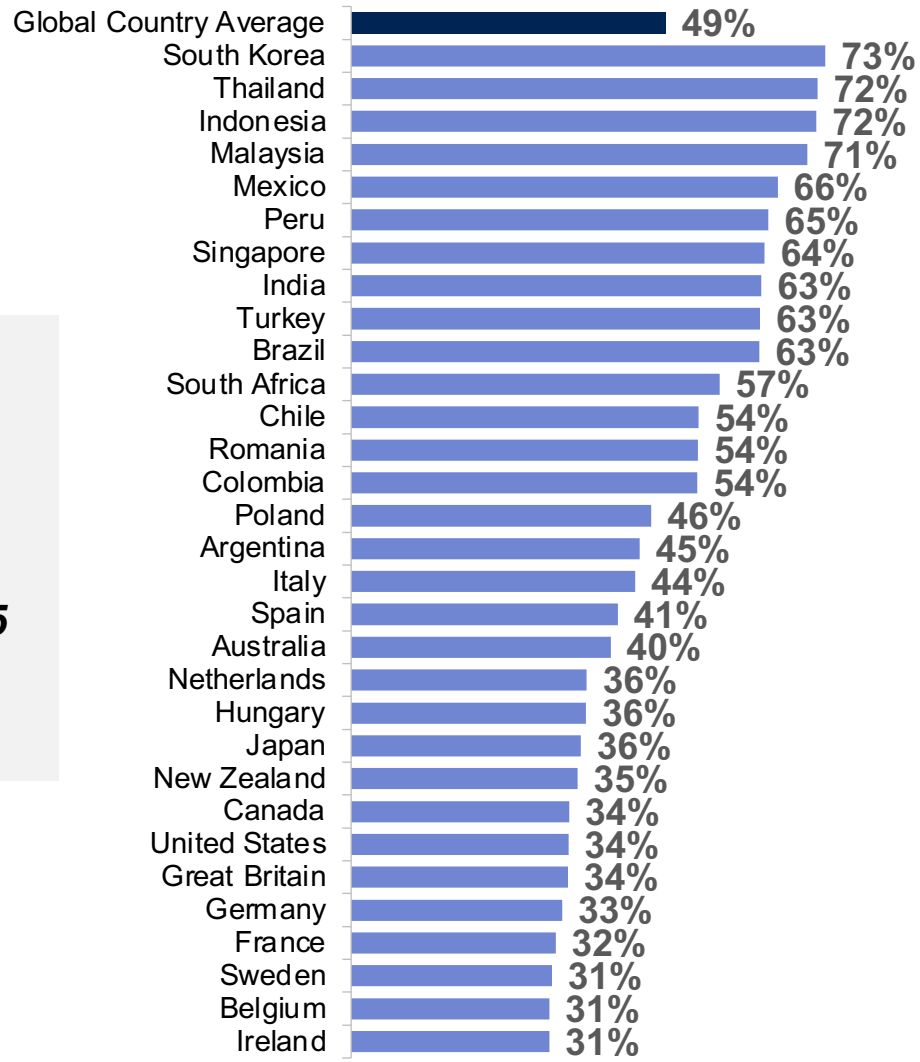
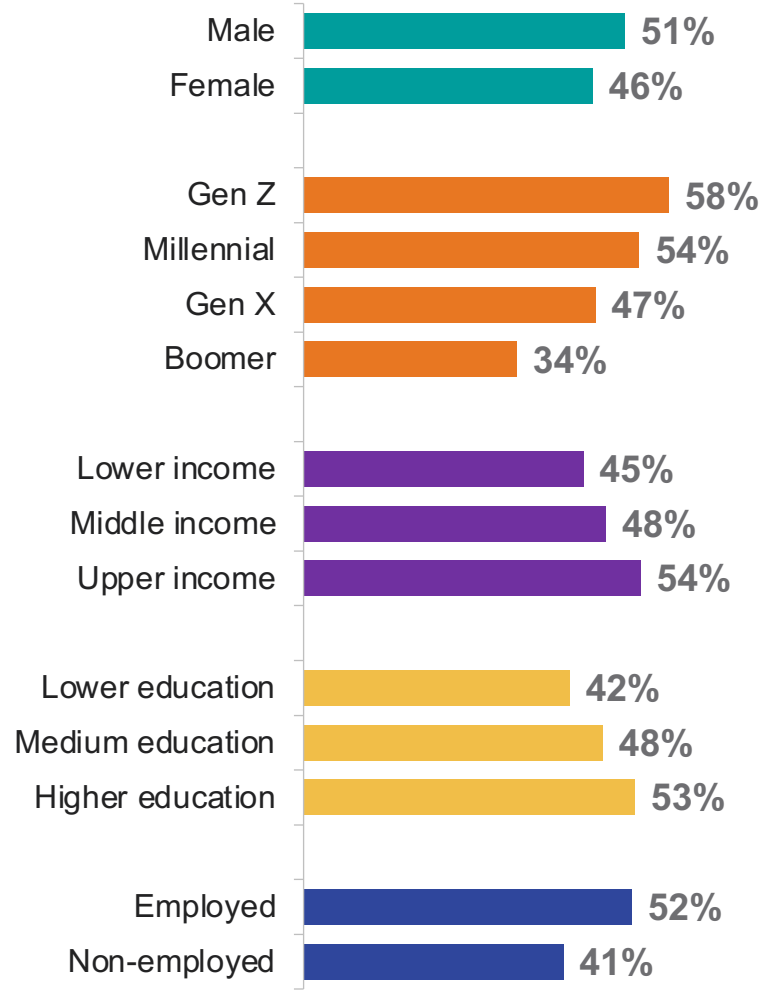
Past impact of AI

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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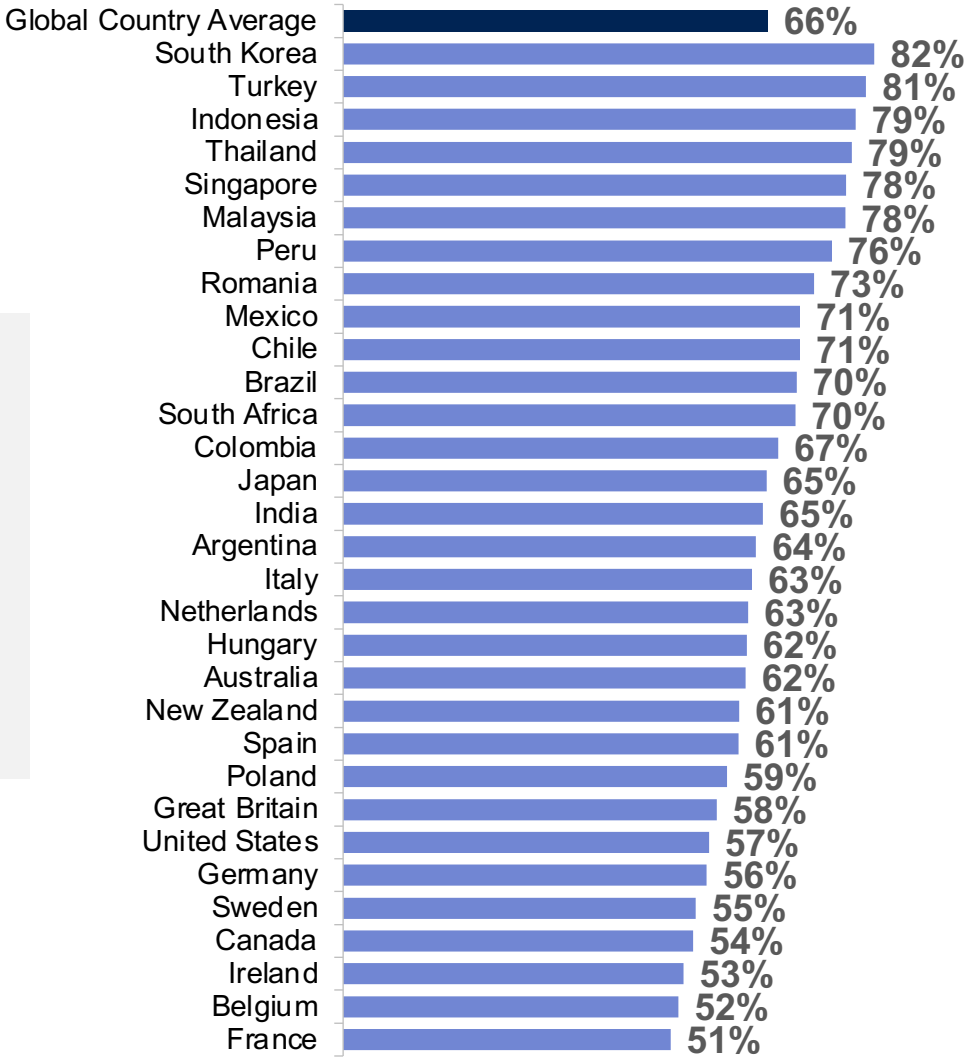
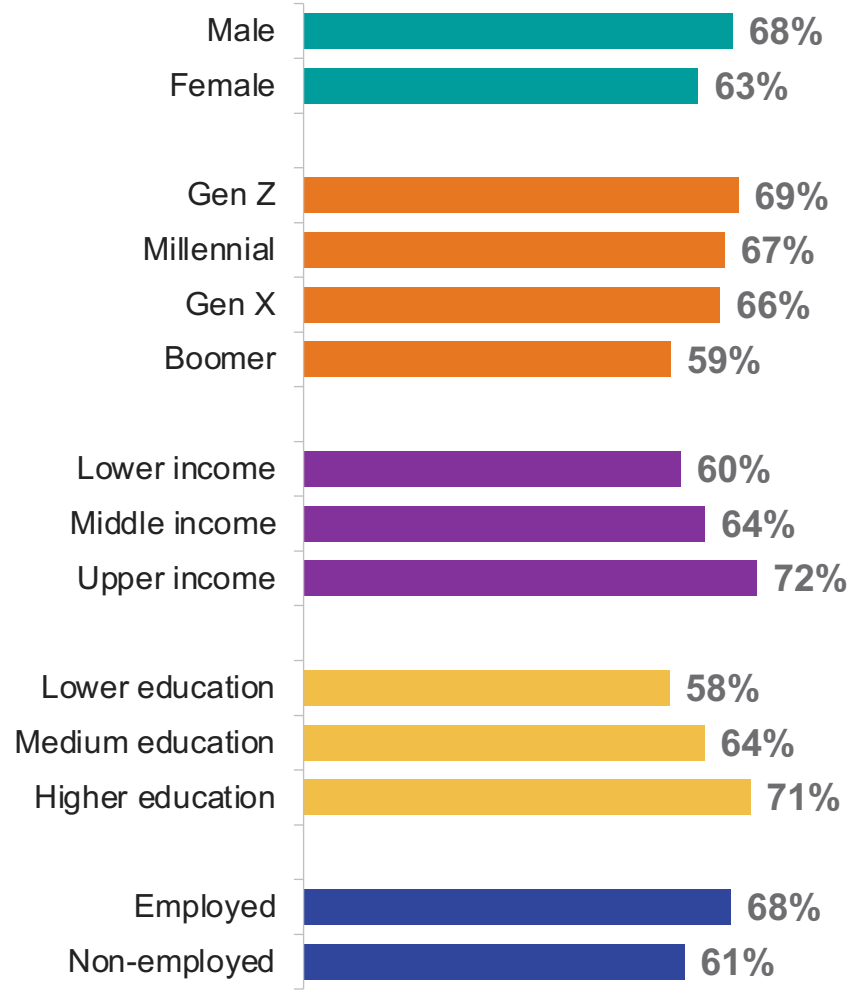
Future impact of AI

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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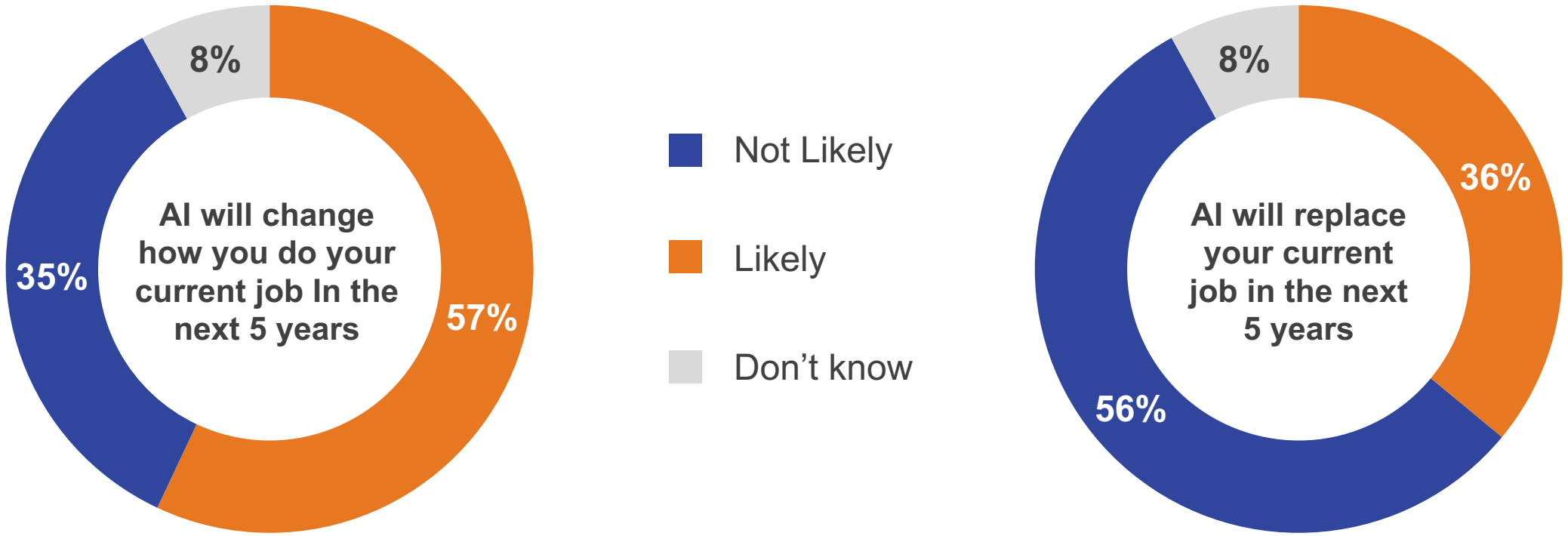
Impact of AI on Current Job

Q. How likely, if at all, do you think it is that… ***(31-country average)***



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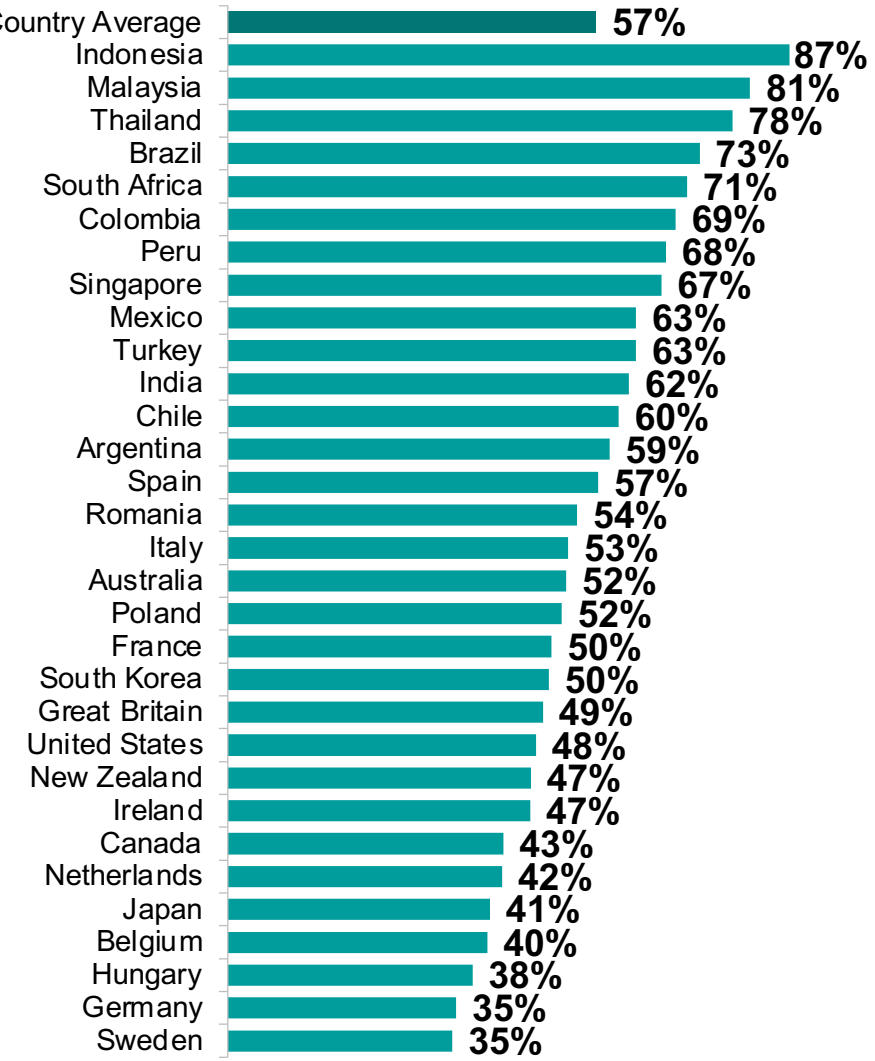
Impact of AI on Current Job

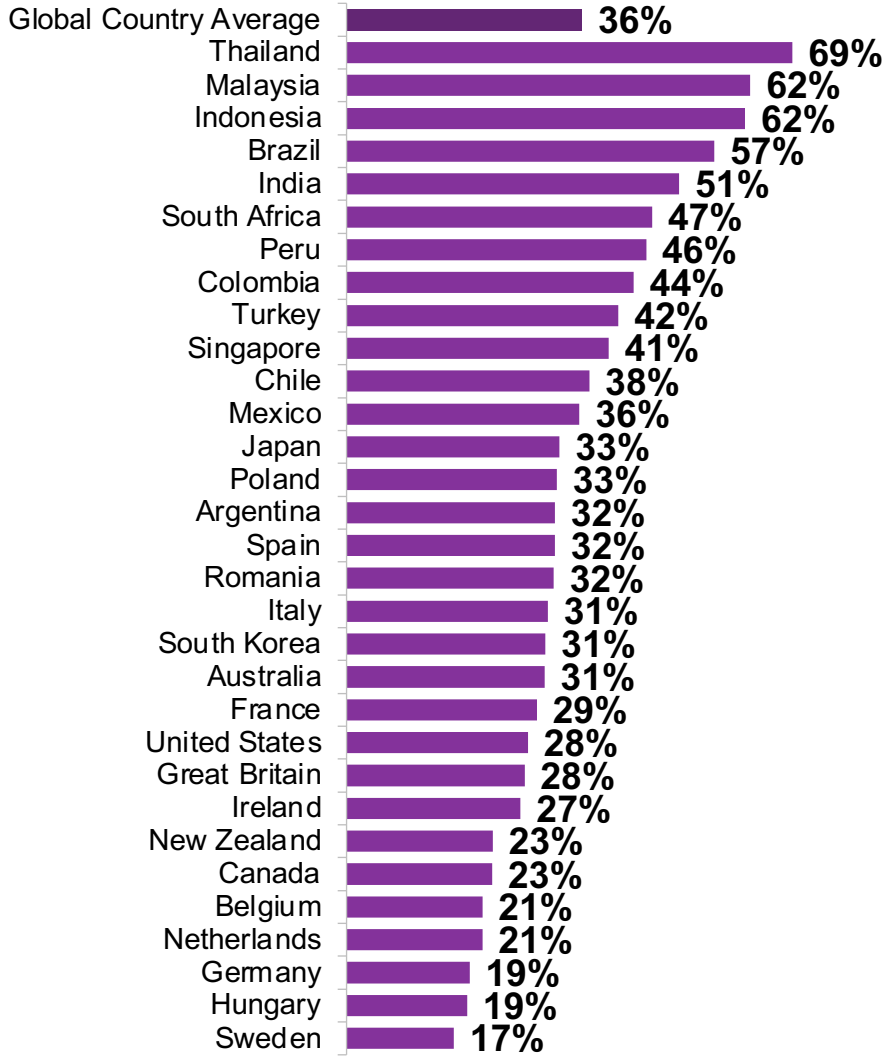
How likely, if at all, do you think it is that AI will _____ in the next 5 years?

% Likely (very/somewhat)

AI will change how you do your current job



AI will replace your current job



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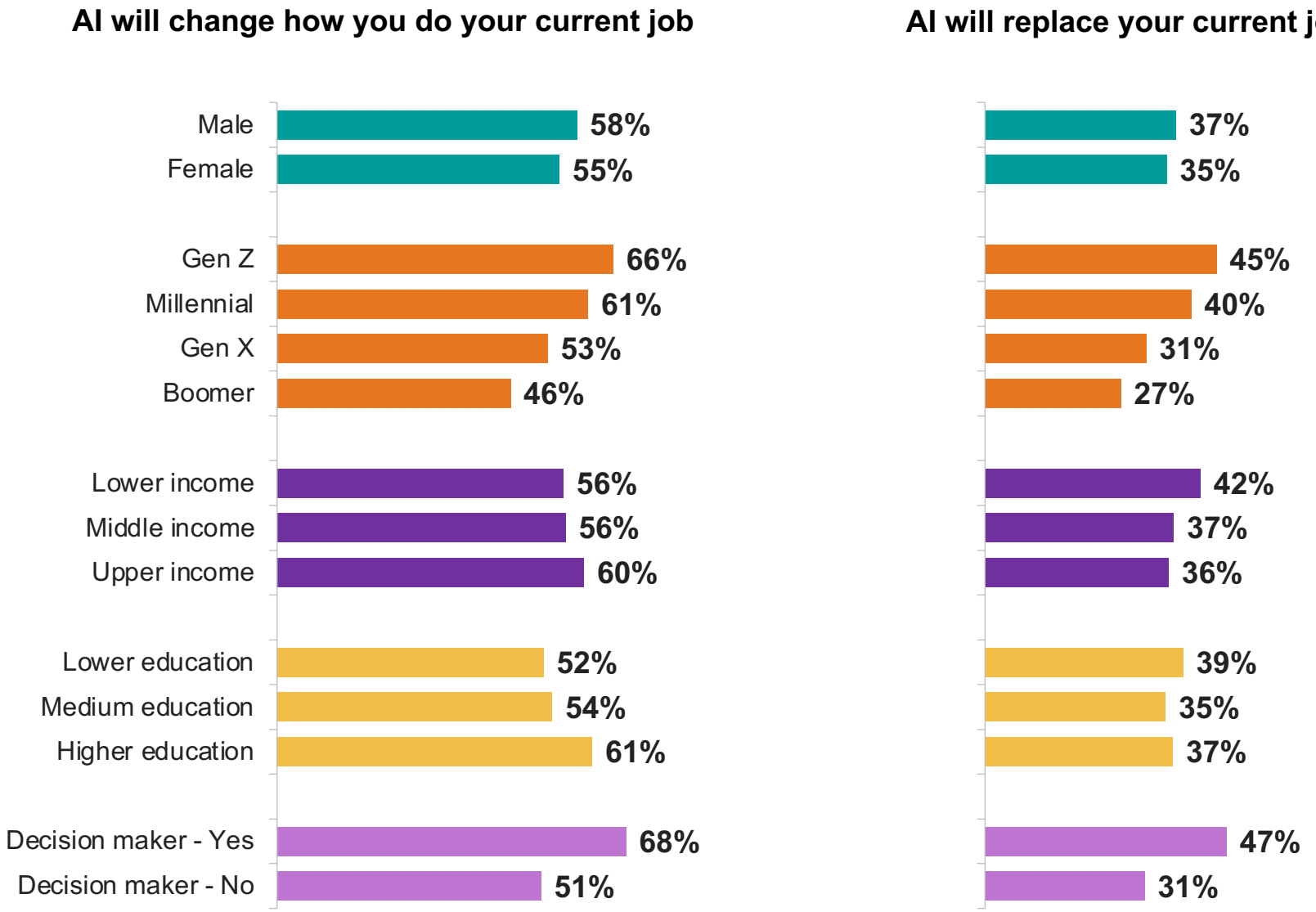
Impact of AI on Current Job

How likely, if at all, do you think it is that AI will _____ in the next 5 years?

% Likely (very/somewhat)



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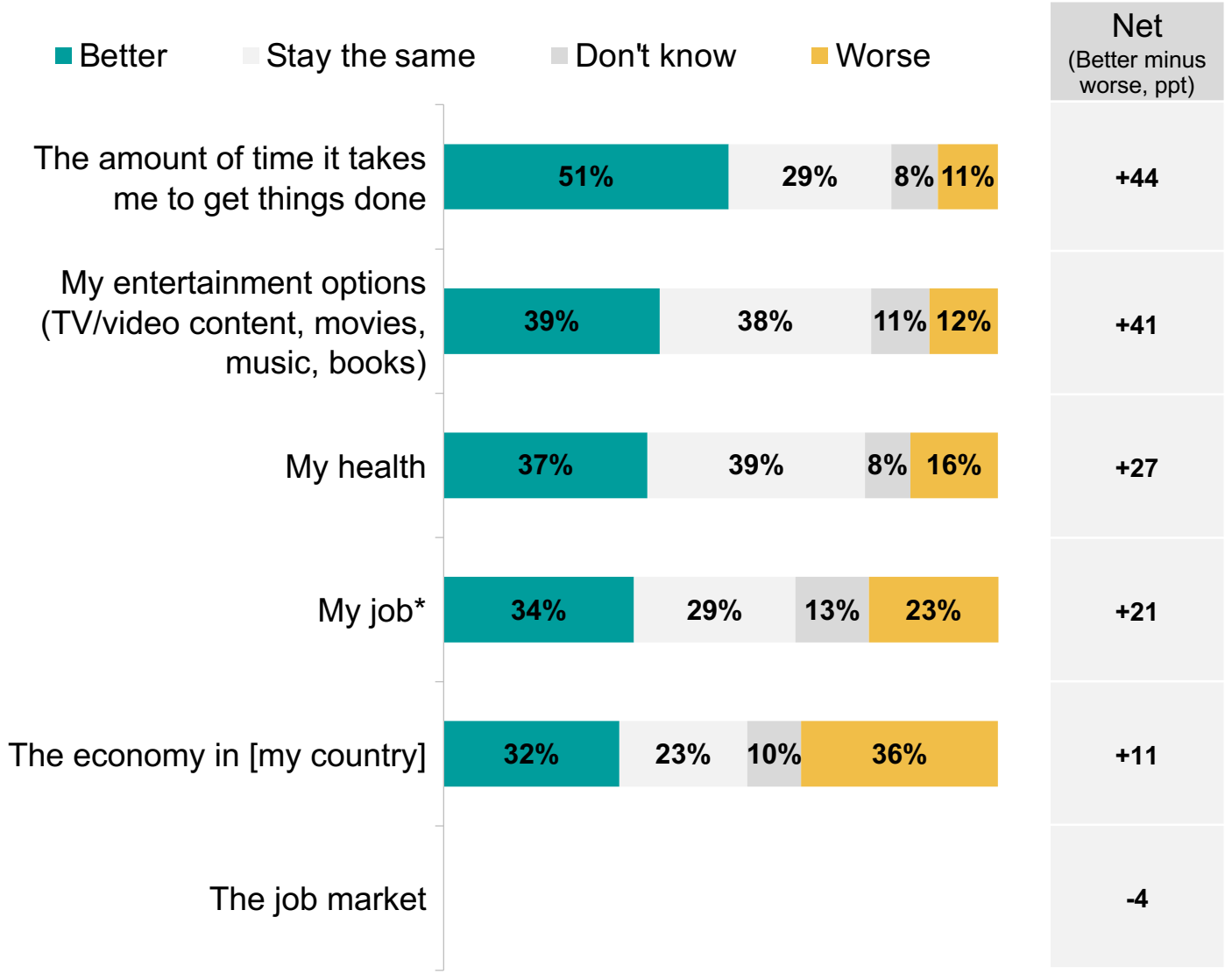
5

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

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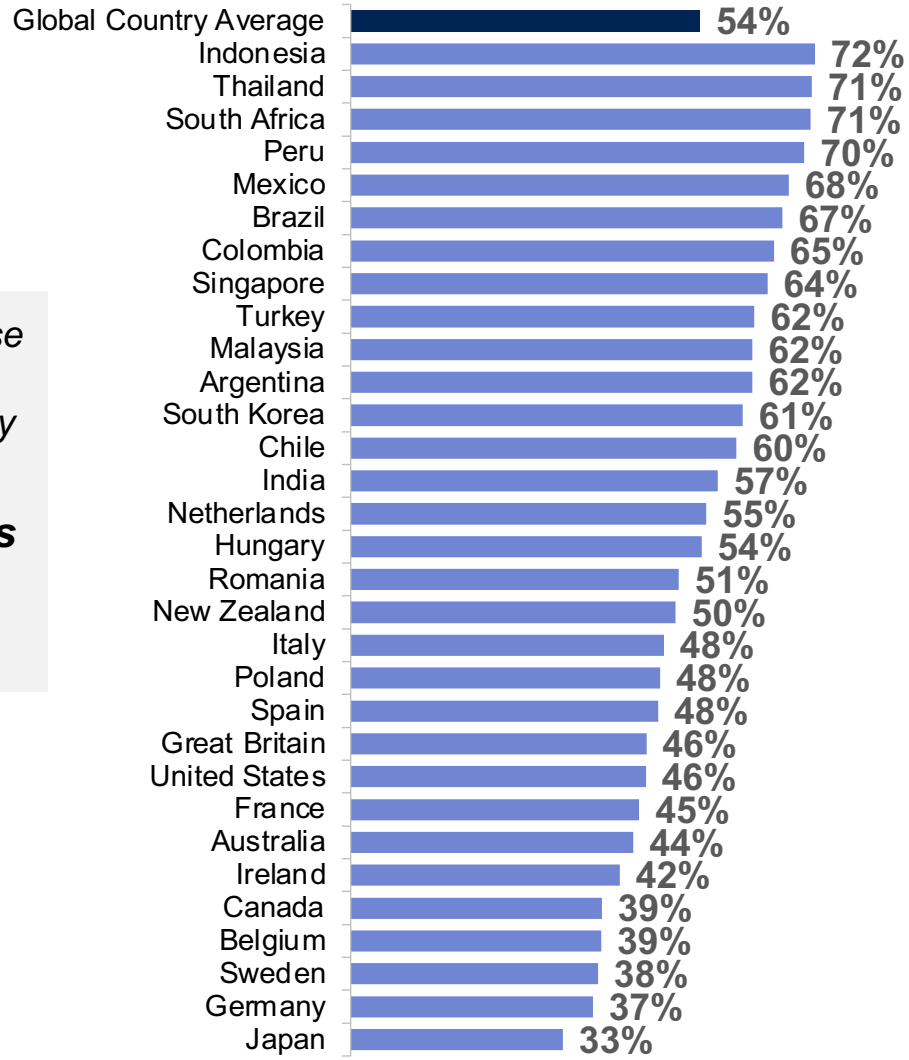
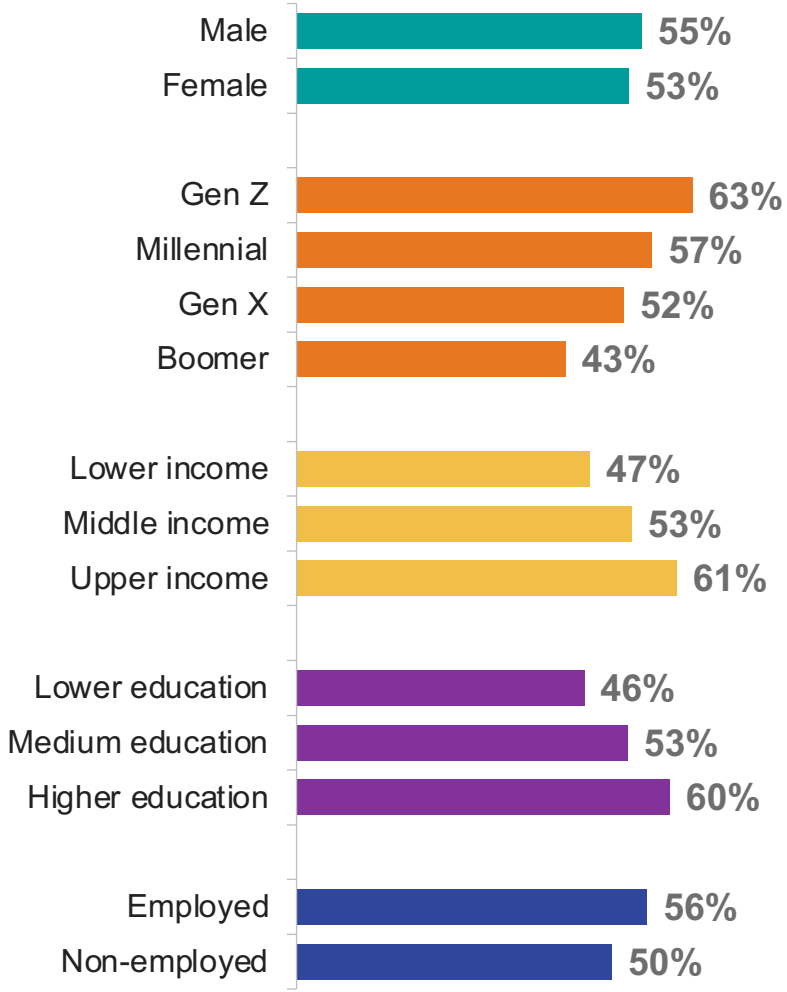
AI and My Time

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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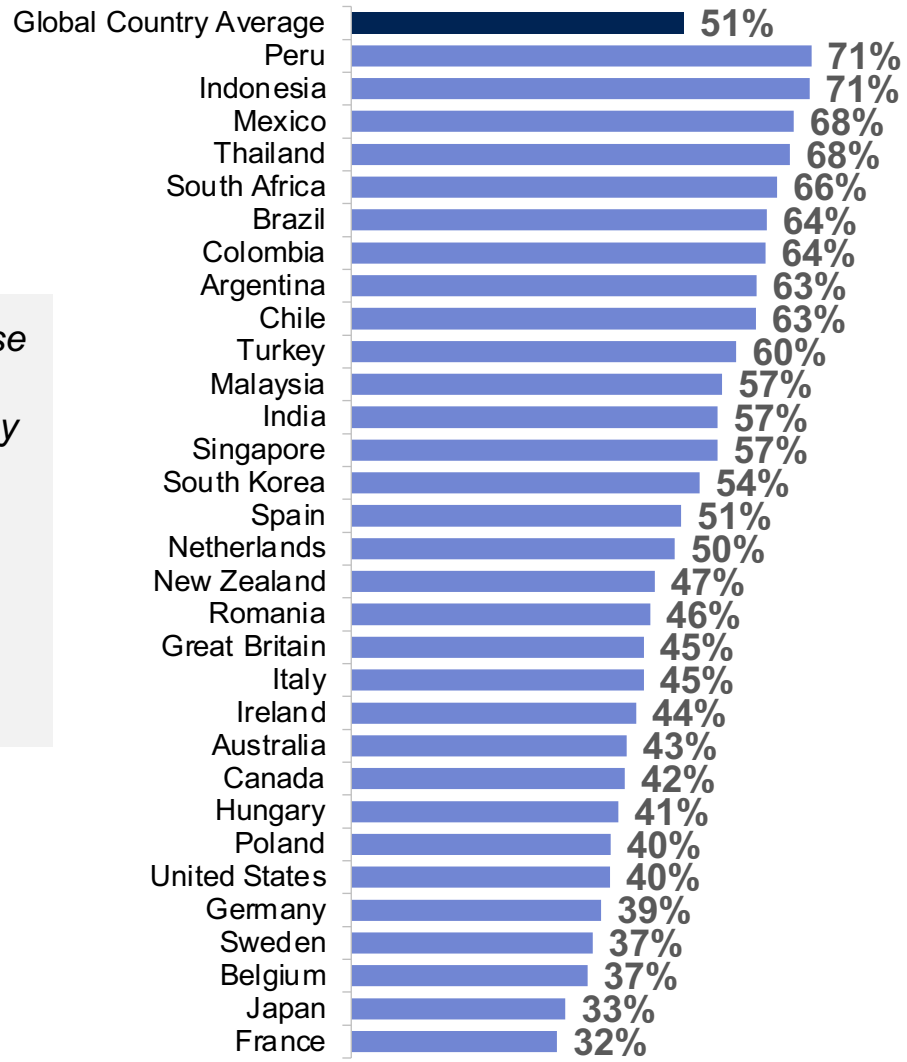
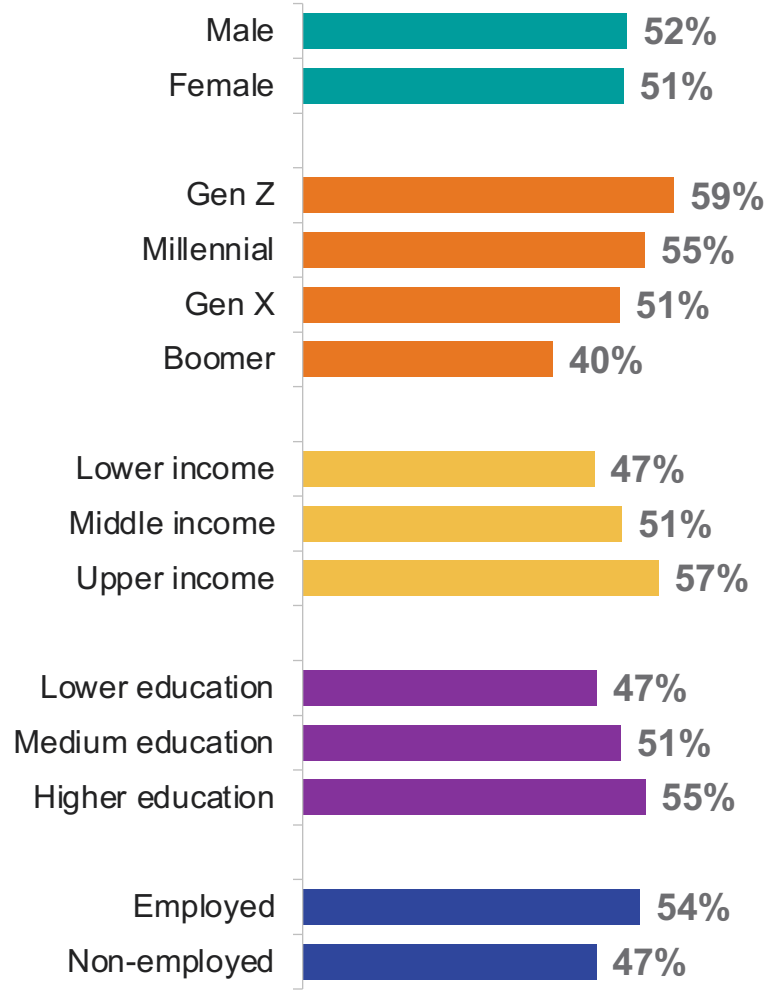
AI and My Entertainment Options

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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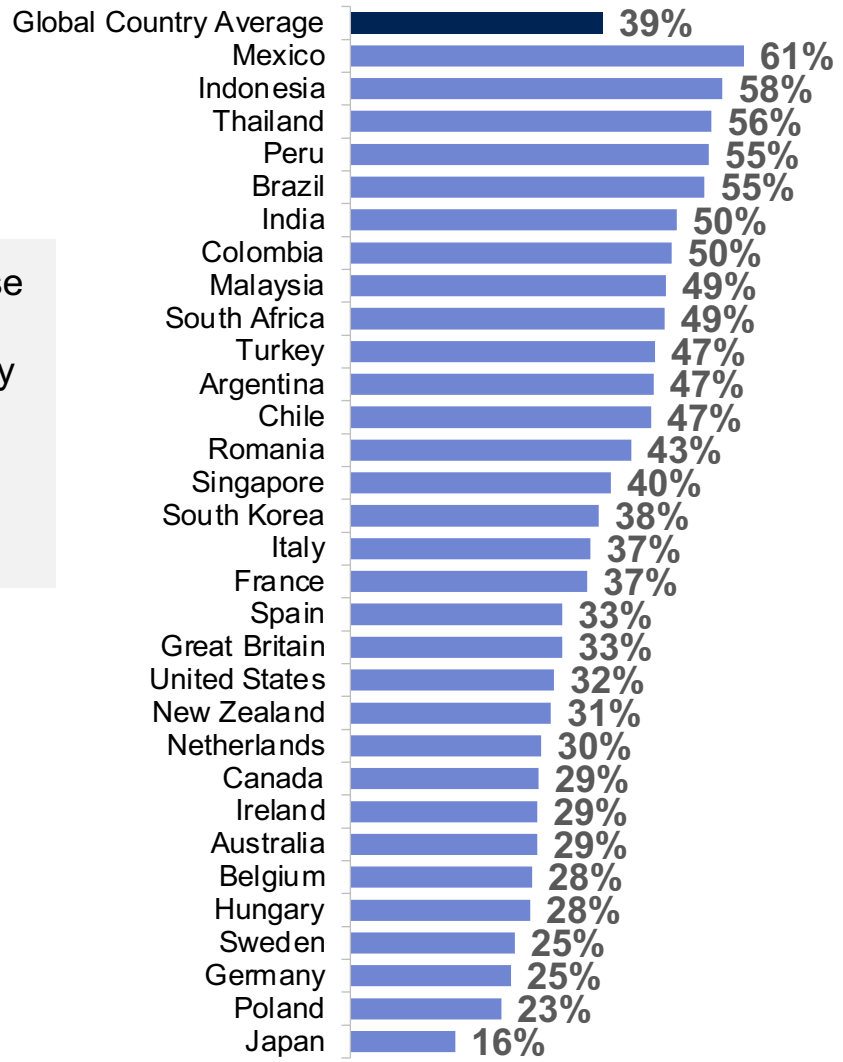
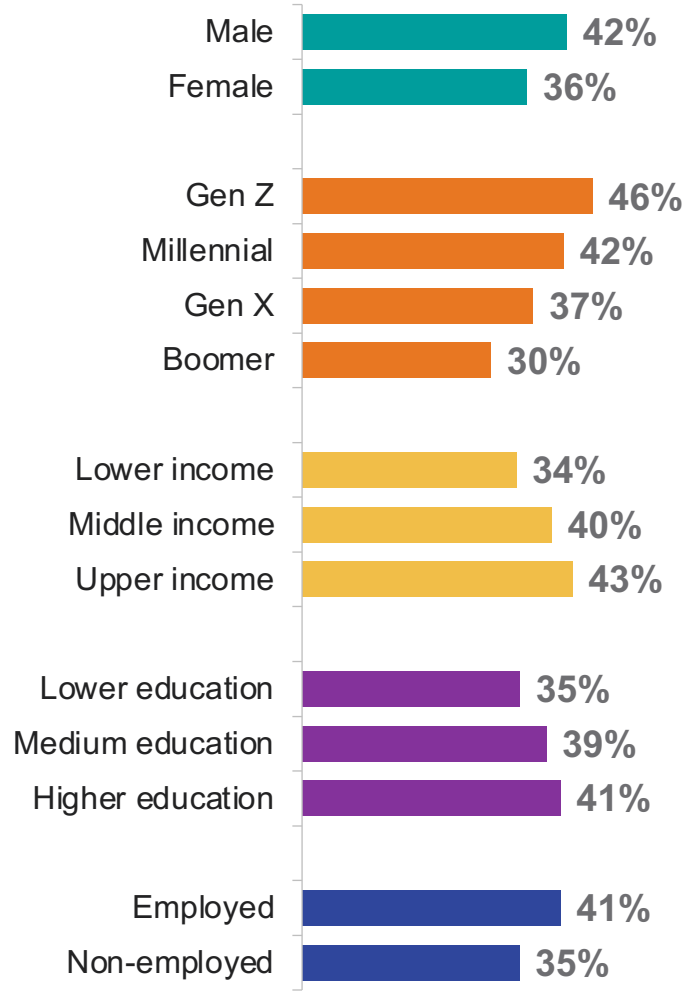
AI and My Health

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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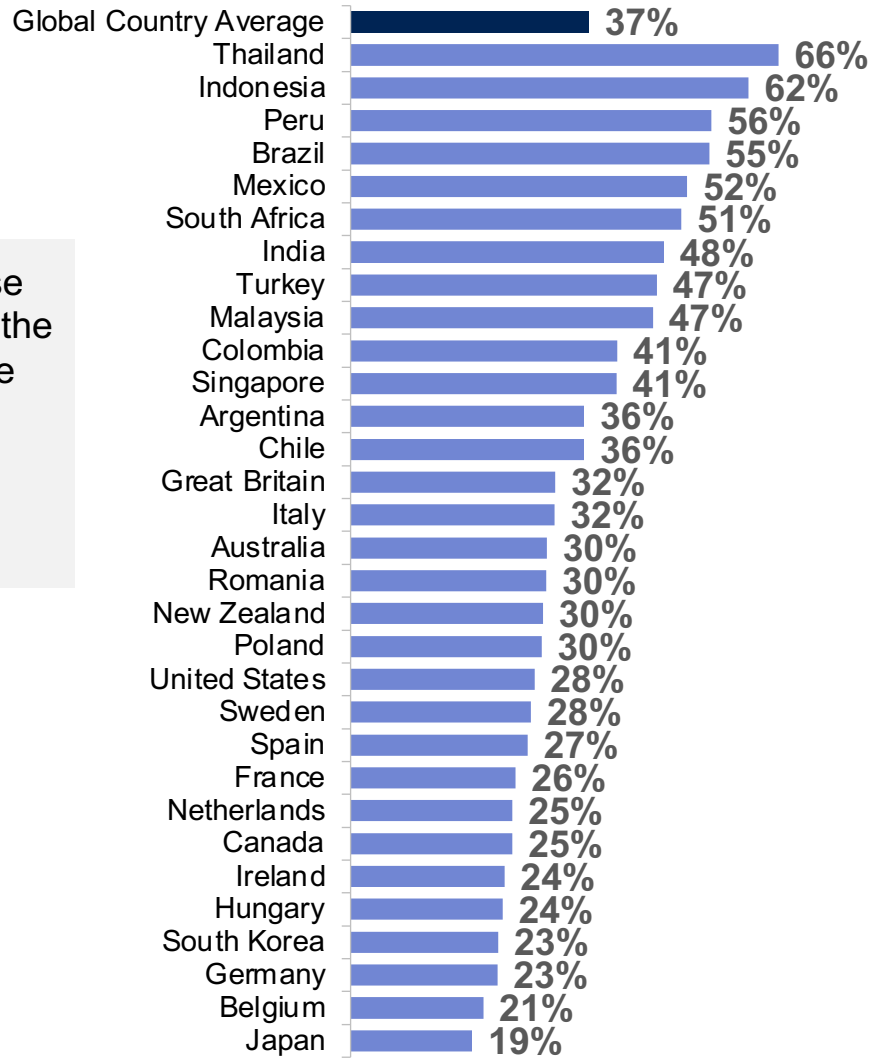
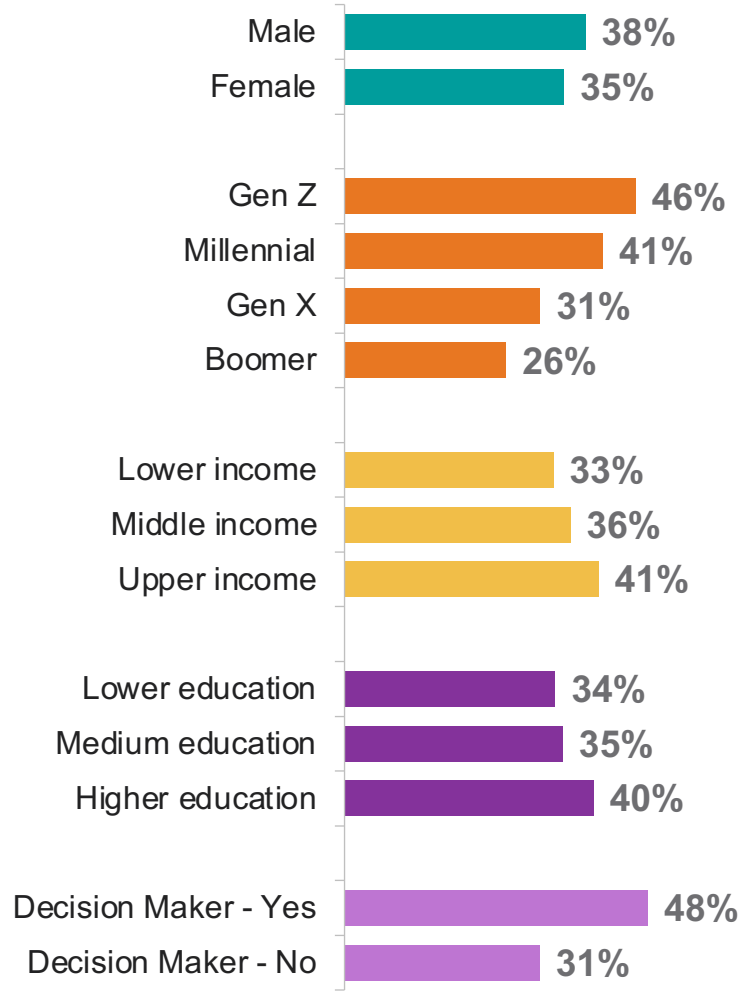
AI and My Job

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)





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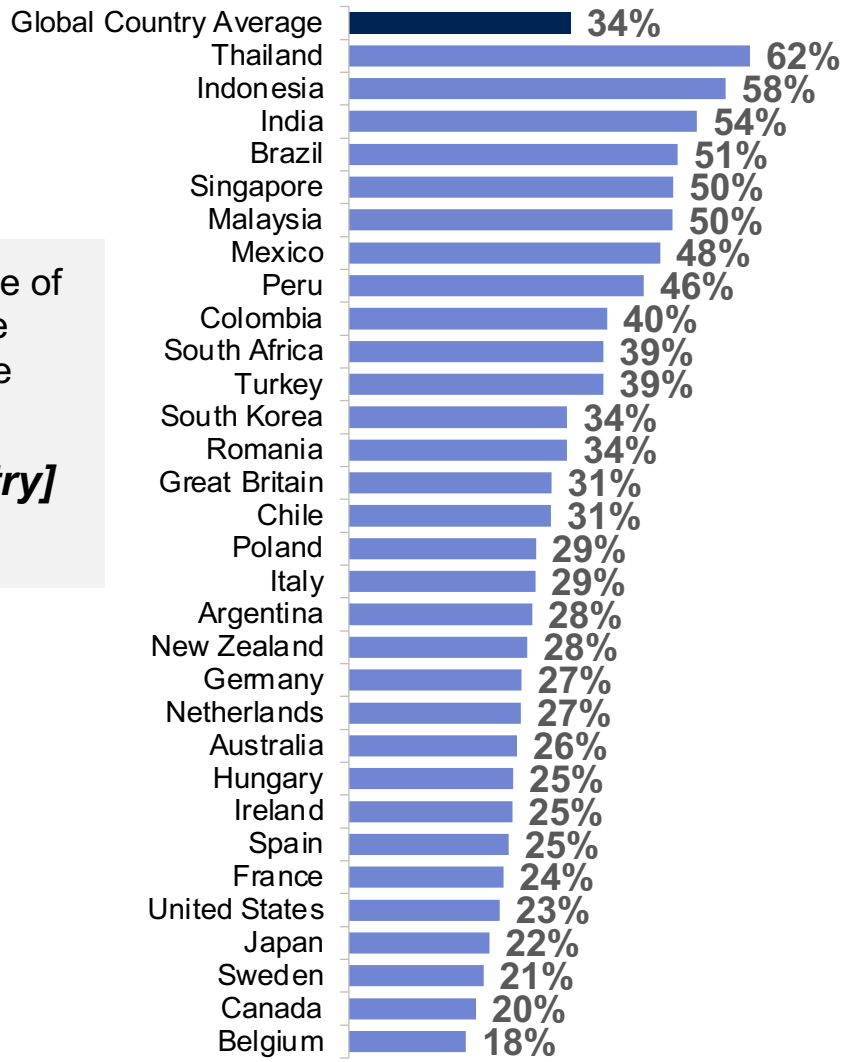
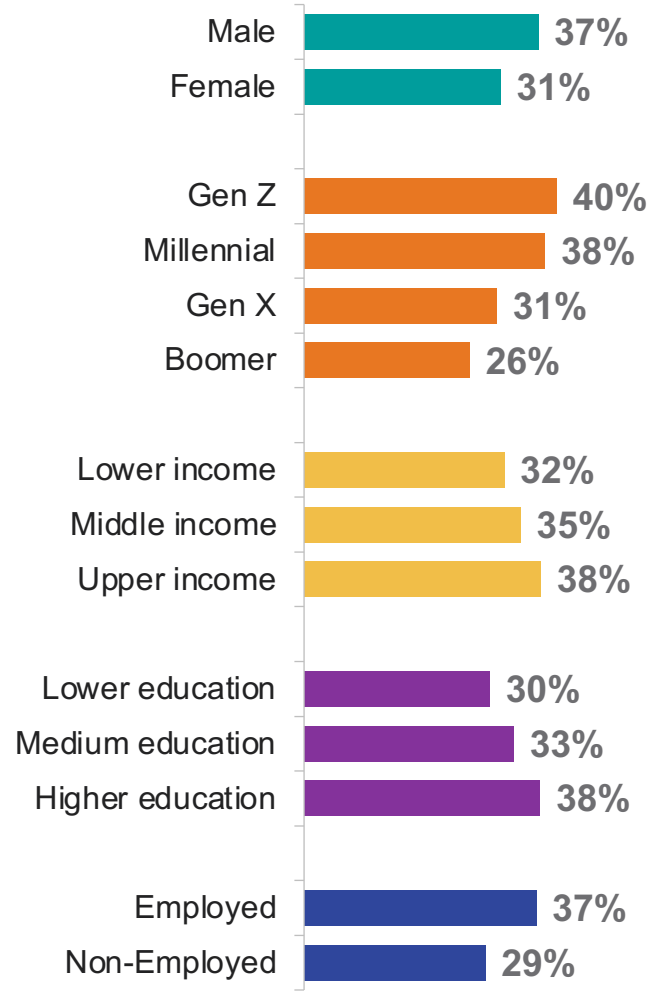
AI and the Economy

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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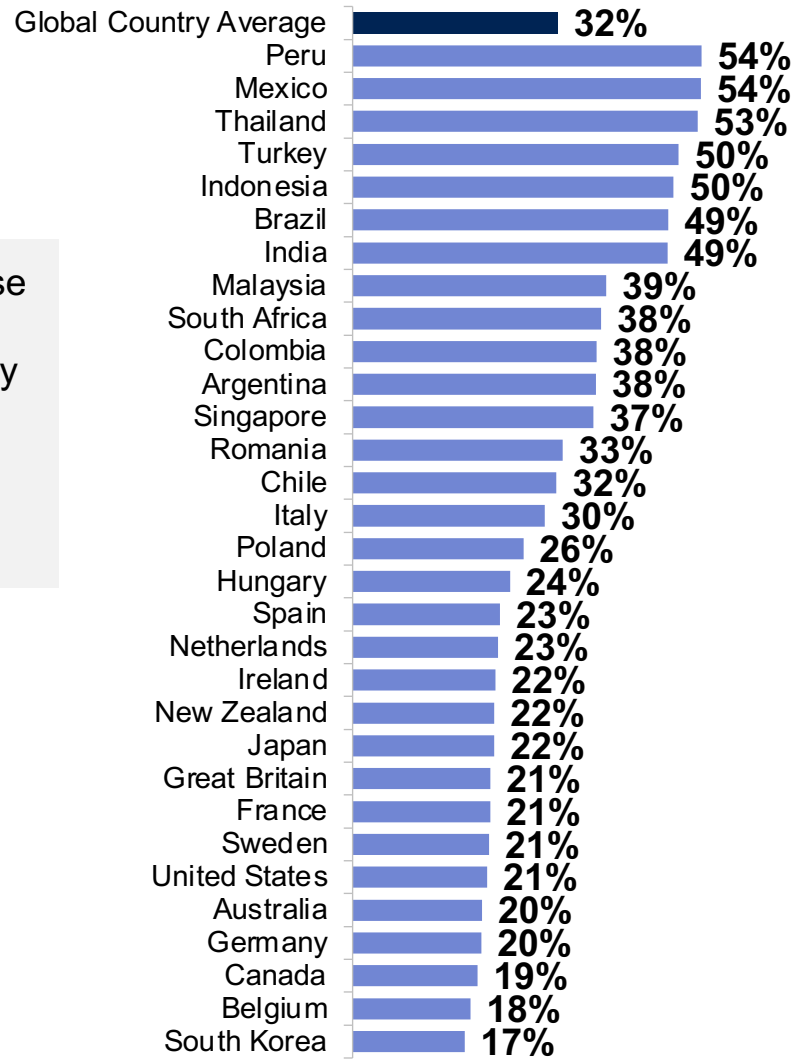
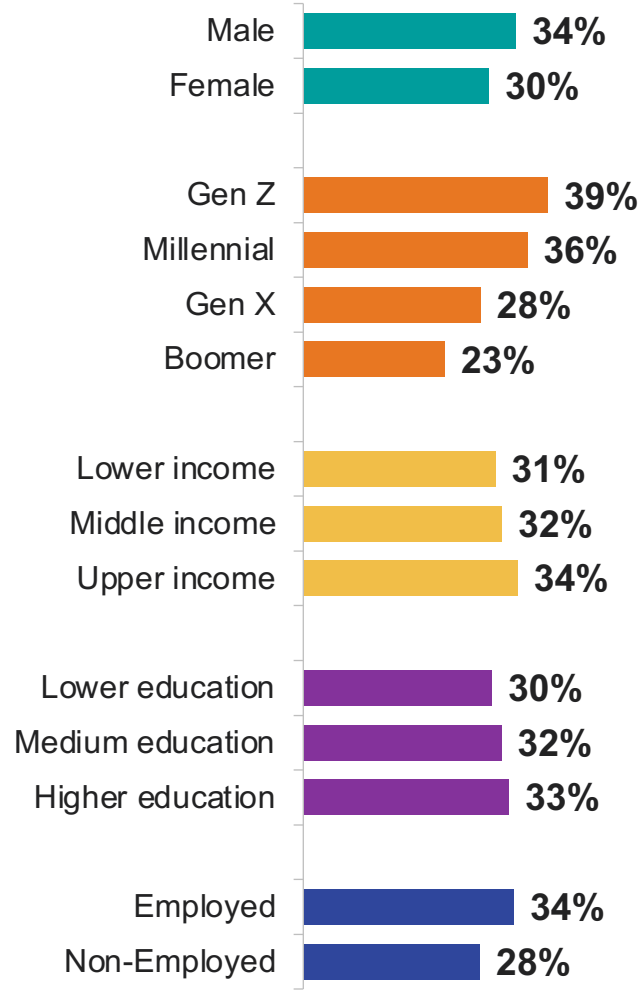
AI and the Job Market

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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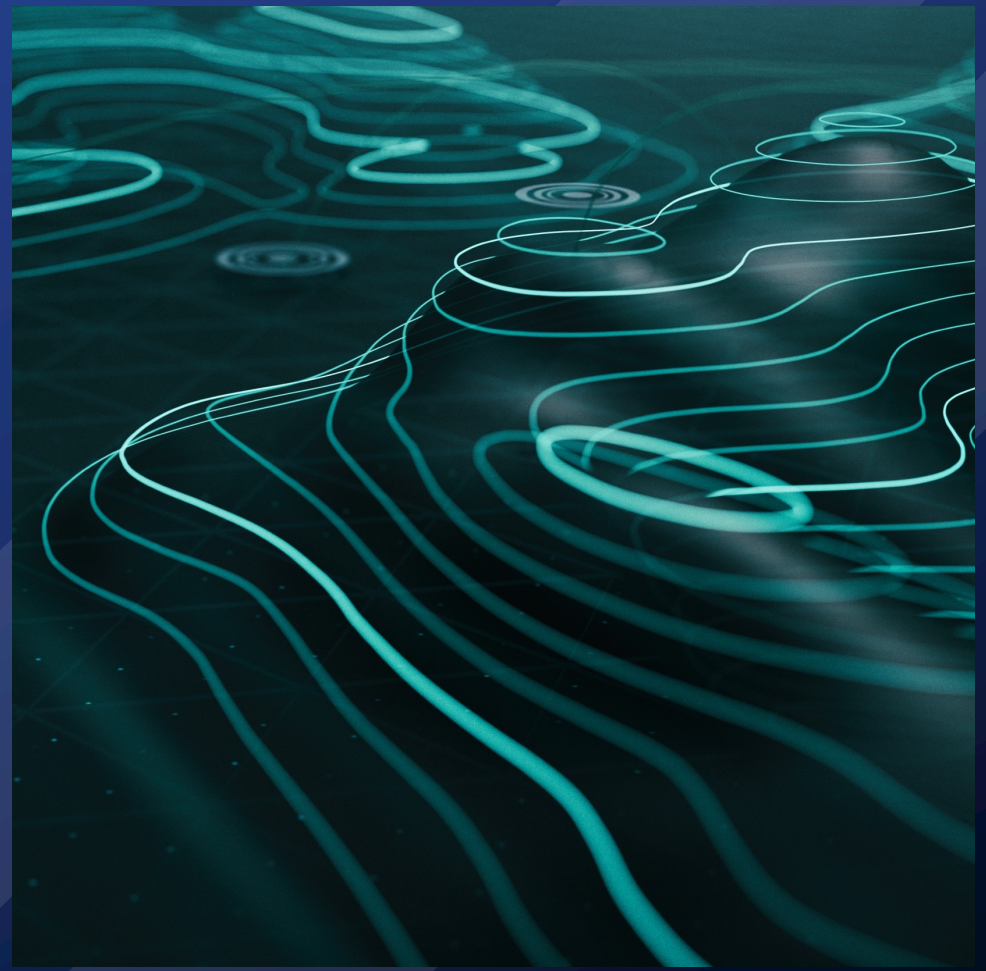
Appendix



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%

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.
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

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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

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.
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.
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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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About Ipsos

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

Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

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

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).
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Game Changers

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This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

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.

So that our clients can act faster, smarter and bolder.

Ultimately, success comes down to a simple truth:

You act better when you are sure.

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