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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 Al is still lagging

- On average across the 31 countries surveyed, twothirds 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 Al is higher among younger adults, men, those who are employed, more educated, and/or more affluent.
- In a typical pattern, familiarity with Al-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.

differences in trust

Wide geographic

- Trust in Al 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 Al-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

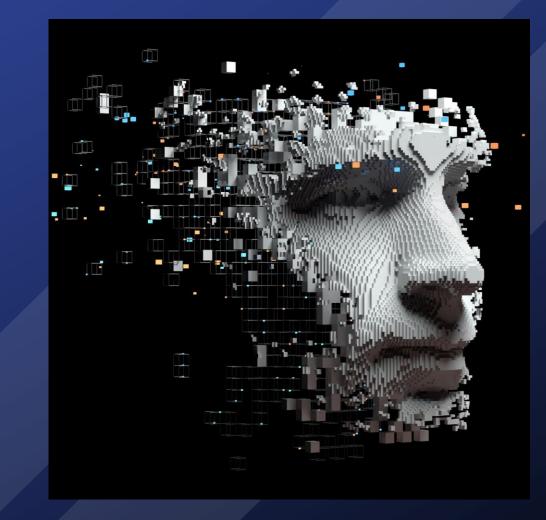
- On average, 66% agree that Al-powered products and services will significantly change their daily life in the next 3-5 years, including majorities in all countries (from 82% in South Korea to 51% in France) and all demographic groups (but especially among the more affluent and those with a college 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.

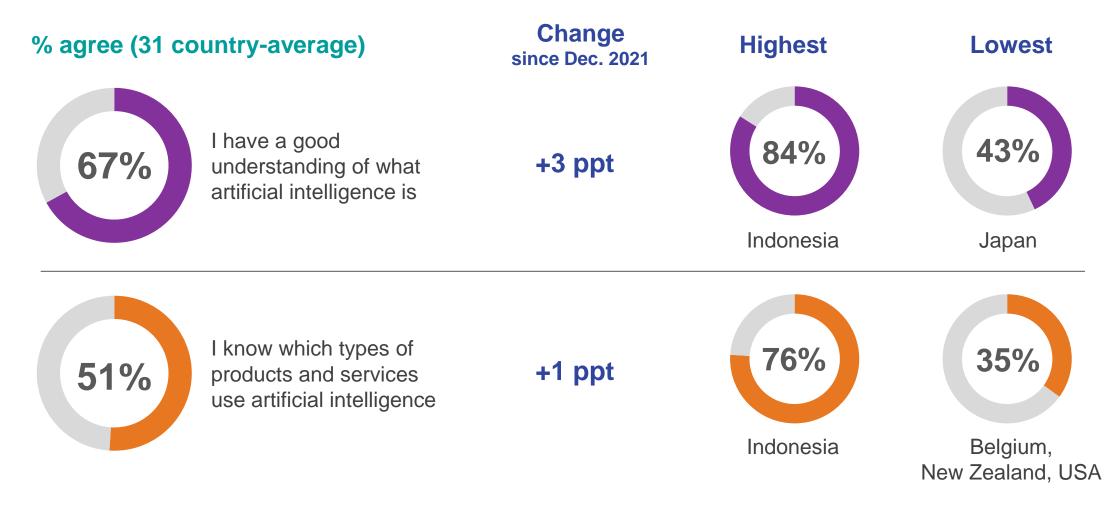


Understanding of Al





Understanding of AI



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.



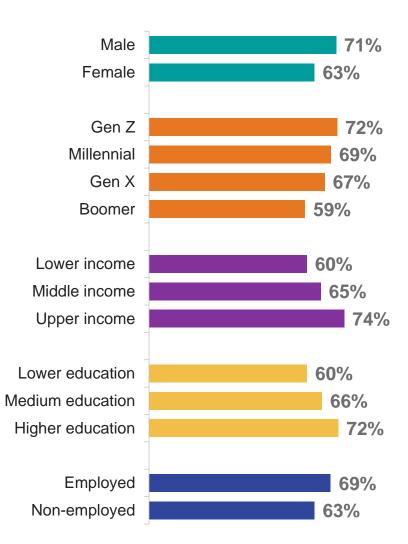
Understanding of AI

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

I have a good understanding of what artificial intelligence is

% Agree (very/somewhat)

| Clobal Country Average | C70/ |
|------------------------|------|
| Global Country Average | 67% |
| Indonesia | 84% |
| South Africa | 78% |
| Thailand | 78% |
| Romania | 77% |
| South Korea | 76% |
| Mexico | 75% |
| Brazil | 74% |
| Peru | 73% |
| Turkey | 73% |
| Hungary | 73% |
| Colombia | 73% |
| Netherlands | 71% |
| Chile | 70% |
| Poland | 69% |
| Singapore | 67% |
| United States | 67% |
| Sweden | 67% |
| Argentina | 67% |
| Spain | 66% |
| Malaysia | 65% |
| Great Britain | 64% |
| India | 64% |
| New Zealand | 62% |
| Germany | 61% |
| Australia | 59% |
| Canada | 59% |
| France | 58% |
| Ireland | 58% |
| Belgium | 56% |
| Italy | 53% |
| Japan | 43% |



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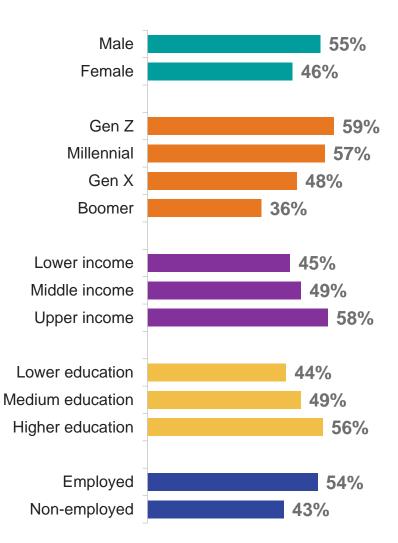
Understanding Global Country Average Indonesia Thailand Turkey Malaysia South Korea Peru Brazil Brazil

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)

| 51% |
|-----|
| 76% |
| 73% |
| 71% |
| 68% |
| 68% |
| 65% |
| 62% |
| 62% |
| 62% |
| 61% |
| 60% |
| 58% |
| 57% |
| 53% |
| 50% |
| 46% |
| 46% |
| 44% |
| 43% |
| 42% |
| 39% |
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| 38% |
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| 35% |
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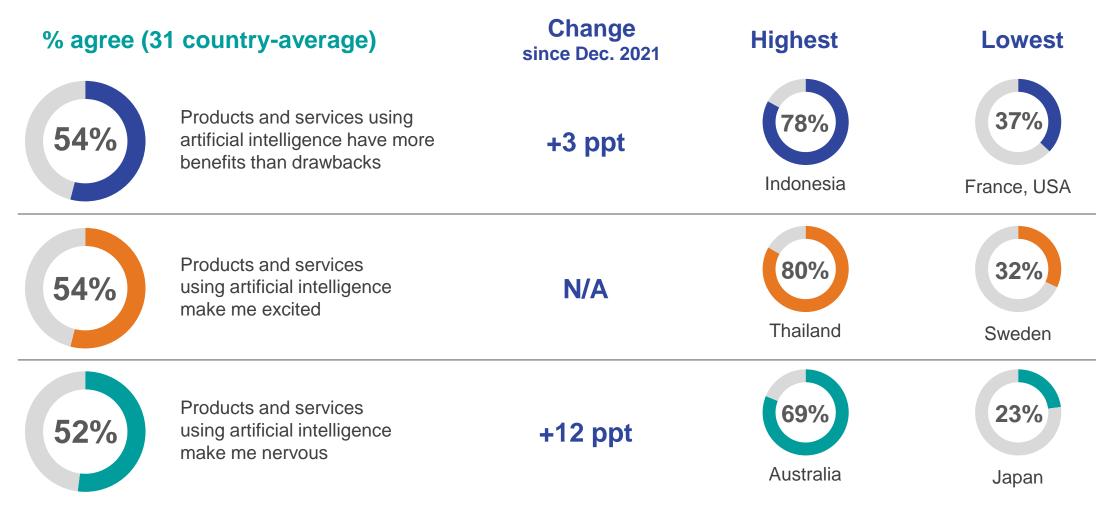


Feelings about Al





Feelings about Al



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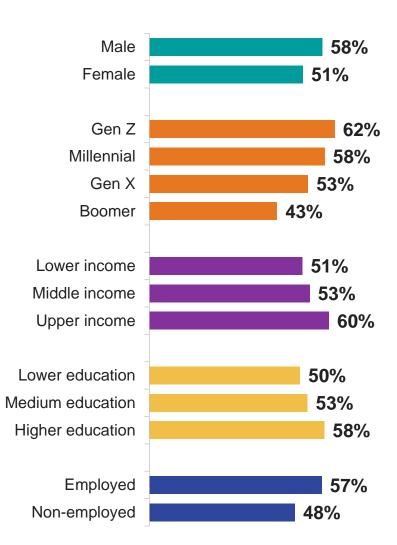
Feelings about Al

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)

| Country Average | 54% |
|-----------------|-----|
| Indonesia | 78% |
| Thailand | 74% |
| Mexico | 73% |
| Malaysia | 69% |
| Peru | 67% |
| Turkey | 67% |
| South Korea | 66% |
| Colombia | 65% |
| India | 65% |
| Brazil | 64% |
| Singapore | 64% |
| Romania | 61% |
| South Africa | 59% |
| Chile | 59% |
| Argentina | 57% |
| Italy | 55% |
| Japan | 52% |
| Spain | 50% |
| Hungary | 48% |
| Poland | 47% |
| Great Britain | 46% |
| New Zealand | 44% |
| Netherlands | 43% |
| Germany | 42% |
| Ireland | 40% |
| Australia | 40% |
| Belgium | 39% |
| Sweden | 39% |
| Canada | 38% |
| France | 37% |
| United States | 37% |



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Global



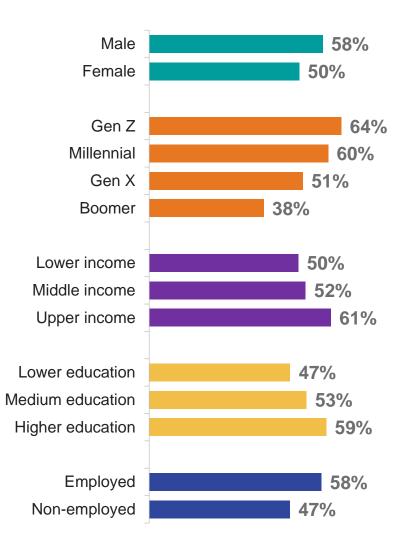
Feelings about Al

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

Products and services using artificial intelligence make me excited

% Agree (very/somewhat)

| Global Country Average | 54% |
|------------------------|-----|
| Thailand | 80% |
| South Korea | 76% |
| Indonesia | 75% |
| Mexico | 74% |
| Turkey | 74% |
| Malaysia | 74% |
| Peru | 72% |
| India | 66% |
| Brazil | 66% |
| Singapore | 65% |
| Colombia | 62% |
| Romania | 62% |
| South Africa | 59% |
| Chile | 51% |
| Japan | 51% |
| Spain | 50% |
| İtaly | 50% |
| Poland | 50% |
| Argentina | 46% |
| Hungary | 45% |
| Germany | 43% |
| New Zealand | 43% |
| Great Britain | 42% |
| Netherlands | 42% |
| Australia | 40% |
| Ireland | 38% |
| Canada | 37% |
| United States | 36% |
| France | 36% |
| Belgium | 35% |
| Sweden | 32% |



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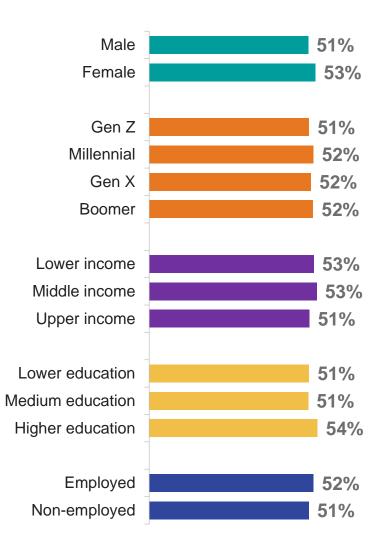
Feelings about Al

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

Products and services using artificial intelligence make me nervous

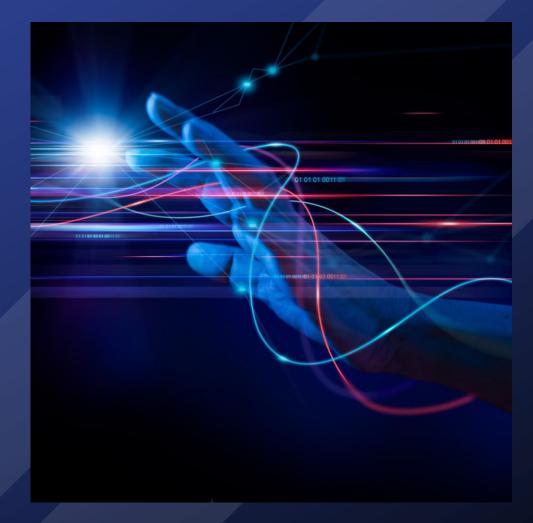
% Agree (very/somewhat)

| G | lobal Country Average | 52% |
|---|-----------------------|--------------|
| | Australia | 69% |
| | Great Britain | 65% |
| | Canada | 63% |
| | New Zealand | 63% |
| | United States | 63% |
| | Ireland | 62% |
| | India | 58% |
| | Thailand | 57% |
| | Malaysia | 55% |
| | Chile | 54% |
| | Turkey | 54% |
| | Singapore | 53% |
| | Sweden | 53% |
| | South Africa | 53% |
| | France | 52% |
| , | Brazil | 51% |
| | Spain | 51% |
| | Netherlands | 50% |
| | Belgium | 50% |
| | Romania | 50% |
| | Italy | 50% |
| | Indonesia | 48% |
| | Mexico | 48% |
| | Peru | 47% |
| | Argentina | 46% |
| | Germany | 46% |
| | Hungary | 46% |
| | Colombia | 40 % |
| | South Korea | 45% |
| | Poland | 38% |
| | Japan | 23% |
| | Japan | ∠J /0 |

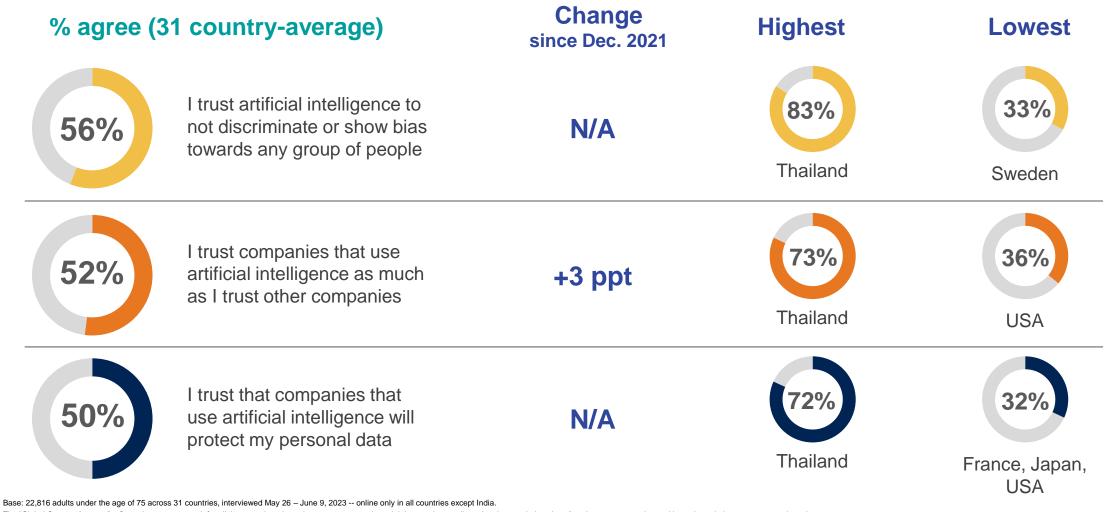


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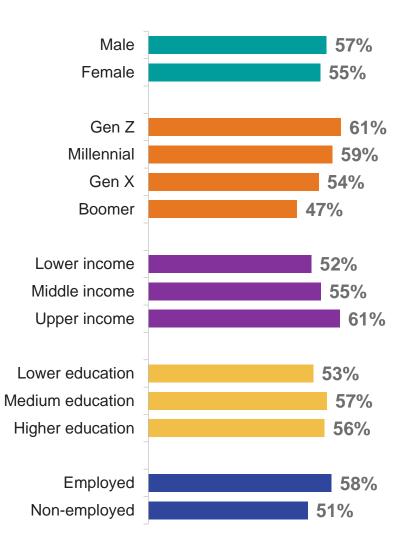


Q. How much do you agree or disagree with the following:

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

% Agree (very/somewhat)

| Ċ | Blobal Country Average | 56% |
|---|------------------------|-----|
| | Thailand | 83% |
| | Indonesia | 76% |
| | Peru | 72% |
| | Mexico | 72% |
| | Malaysia | 68% |
| | Brazil | 66% |
| | India | 66% |
| | Hungary | 66% |
| | South Africa | 65% |
| | Turkey | 63% |
| | Romania | 63% |
| | Singapore | 63% |
| | Argentina | 61% |
| , | Colombia | 61% |
| | Chile | 60% |
| | Poland | 59% |
| | Italy | 59% |
| | South Korea | 55% |
| | Spain | 51% |
| | Germany | 47% |
| | Great Britain | 47% |
| | New Zealand | 45% |
| | Canada | 44% |
| | Australia | 44% |
| | Japan | 43% |
| | Netherlands | 42% |
| | Ireland | 41% |
| | Belgium | 41% |
| | United States | 38% |
| | France | |
| | Sweden | 37% |
| | Sweden | 33% |



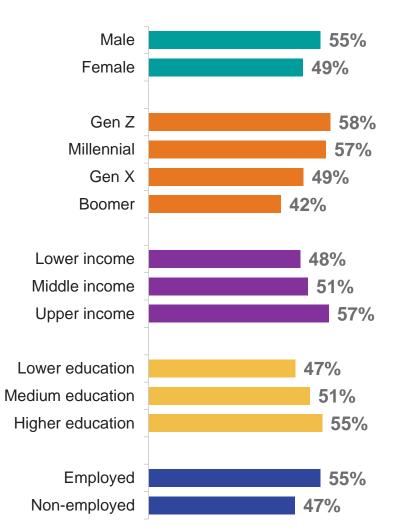
Base: 22,816 adults under the age of 75 across 31 countries, interviewed May 26 - June 9, 2023 -- online only in all countries except India.

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)

| Global Country Average | 52% |
|------------------------|-----|
| Thailand | 73% |
| Malaysia | 70% |
| Indonesia | 69% |
| India | 67% |
| Mexico | 66% |
| Turkey | 65% |
| Romania | 62% |
| Peru | 60% |
| Brazil | 60% |
| Singapore | 57% |
| Colombia | 56% |
| South Africa | 55% |
| South Korea | 55% |
| Italy | 53% |
| Argentina | 52% |
| Chile | 51% |
| Poland | 50% |
| Spain | 49% |
| Hungary | 46% |
| Germany | 45% |
| Great Britain | 45% |
| Netherlands | 44% |
| Japan | 44% |
| New Zealand | 43% |
| Australia | 42% |
| Sweden | 42% |
| Belgium | 39% |
| Canada | 39% |
| Ireland | 39% |
| France | 37% |
| United States | 36% |



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Trust in Al Global Country Average 50% Thailand 72% 51% Male 68% Indonesia Mexico 66% Female 49% India 64% 61% Malaysia 61% Romania 55% Gen Z Peru 60% 60% Hungary 53% Millennial 59% Italy Gen X 47% South Africa 58% Q. How much do you agree or 57% Turkey disagree with the following: Boomer 42% Brazil 56% 55% Poland I trust that companies Singapore 54% that use artificial 53% Lower income 47% Colombia 49% Spain intelligence will protect Middle income 49% 47% Netherlands 45% Argentina my personal data 54% Upper income 44% Chile % Agree (very/somewhat) Germany 44% 42% New Zealand Lower education 48% Great Britain 42% 41% Belgium Medium education 50% South Korea 40%

39%

38% 38%

34%

32%

32%

32%

Higher education

Employed

Non-employed

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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. 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

Sweden Ireland

Australia

Canada

United States

Japan

France

50%

52%

45%

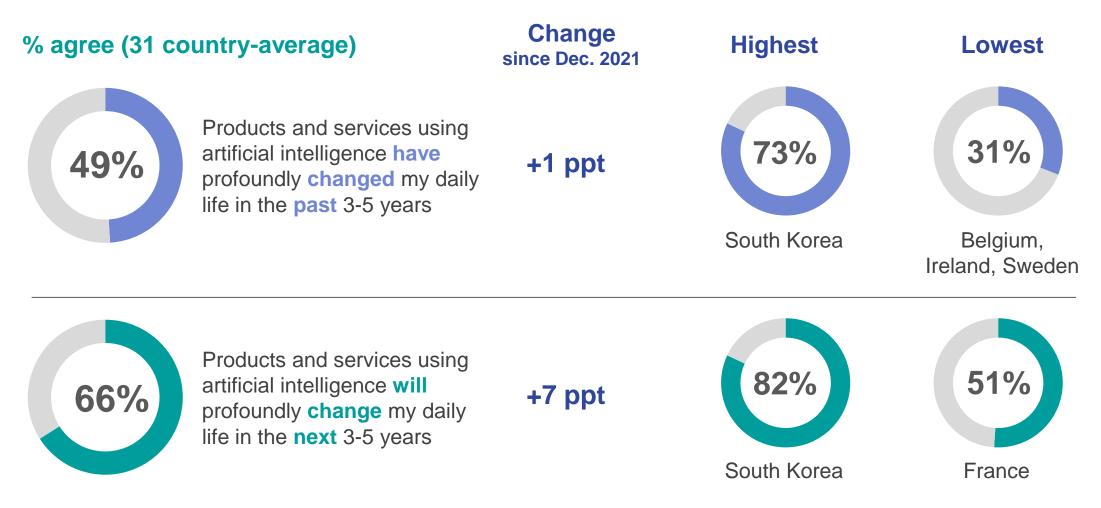


Al impact on one's daily life and job





Al impact on one's daily life



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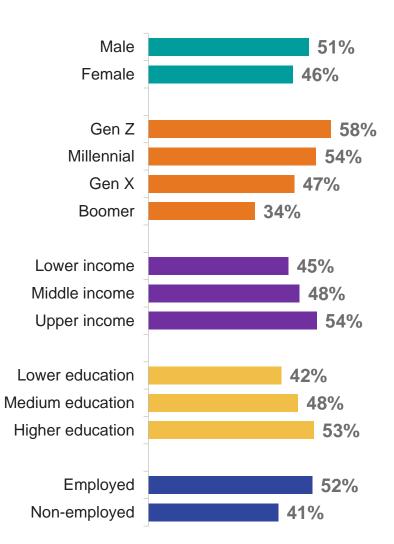
Past impact of AI

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)

| Glo | bal Country Average | 49% |
|-----|---------------------|-----|
| | South Korea | 73% |
| | Thailand | 72% |
| | Indonesia | 72% |
| | Malaysia | 71% |
| | Mexico | 66% |
| | Peru | 65% |
| | Singapore | 64% |
| | India | 63% |
| | Turkey | 63% |
| | Brazil | 63% |
| | South Africa | 57% |
| | Chile | 54% |
| | Romania | 54% |
| | Colombia | 54% |
| | Poland | 46% |
| | Argentina | 45% |
| | Italy | 44% |
| 5 | Spain | 41% |
| | Australia | 40% |
| | Netherlands | 36% |
| | Hungary | 36% |
| | Japan | 36% |
| | New Zealand | 35% |
| | Canada | 34% |
| | United States | 34% |
| | Great Britain | 34% |
| | Germany | 33% |
| | France | 32% |
| | Sweden | 31% |
| | Belgium | 31% |
| | Ireland | 31% |



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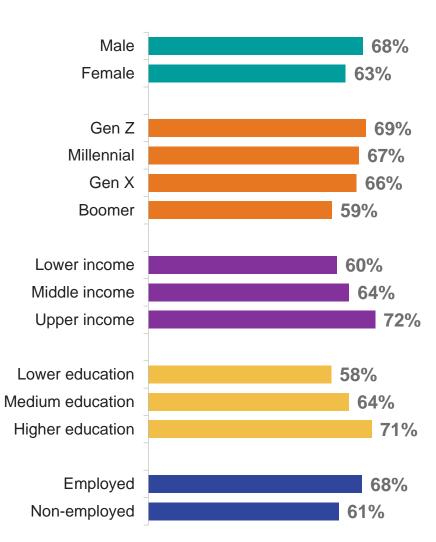
Future impact of AI

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)

| G | lobal Country Average | 66% |
|---|-----------------------|-----|
| | South Korea | 82% |
| | Turkey | 81% |
| | Indonesia | 79% |
| | Thailand | 79% |
| | Singapore | 78% |
| | Malaysia | 78% |
| | Peru | 76% |
| | Romania | 73% |
| | Mexico | 71% |
| | Chile | 71% |
| | Brazil | 70% |
| | South Africa | 70% |
| | Colombia | 67% |
| | Japan | 65% |
|) | India | 65% |
| - | Argentina | 64% |
| | Italy | 63% |
| | Netherlands | 63% |
| | Hungary | 62% |
| | Australia | 62% |
| | New Zealand | 61% |
| | Spain | 61% |
| | Poland | 59% |
| | Great Britain | 58% |
| | United States | 57% |
| | Germany | 56% |
| | Sweden | 55% |
| | Canada | 54% |
| | Ireland | 53% |
| | Belgium | 52% |
| | France | 51% |

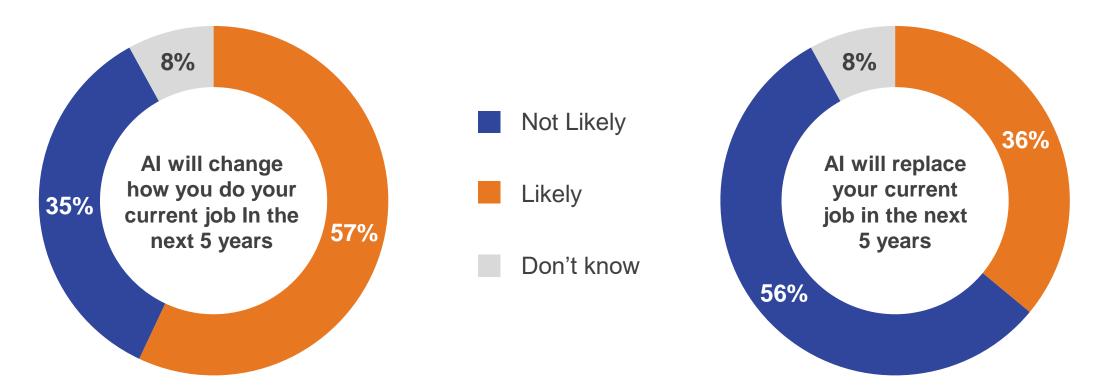


Base: 22,816 adults under the age of 75 across 31 countries, interviewed May 26 - June 9, 2023 -- online only in all countries except India.



Impact of AI on Current Job

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

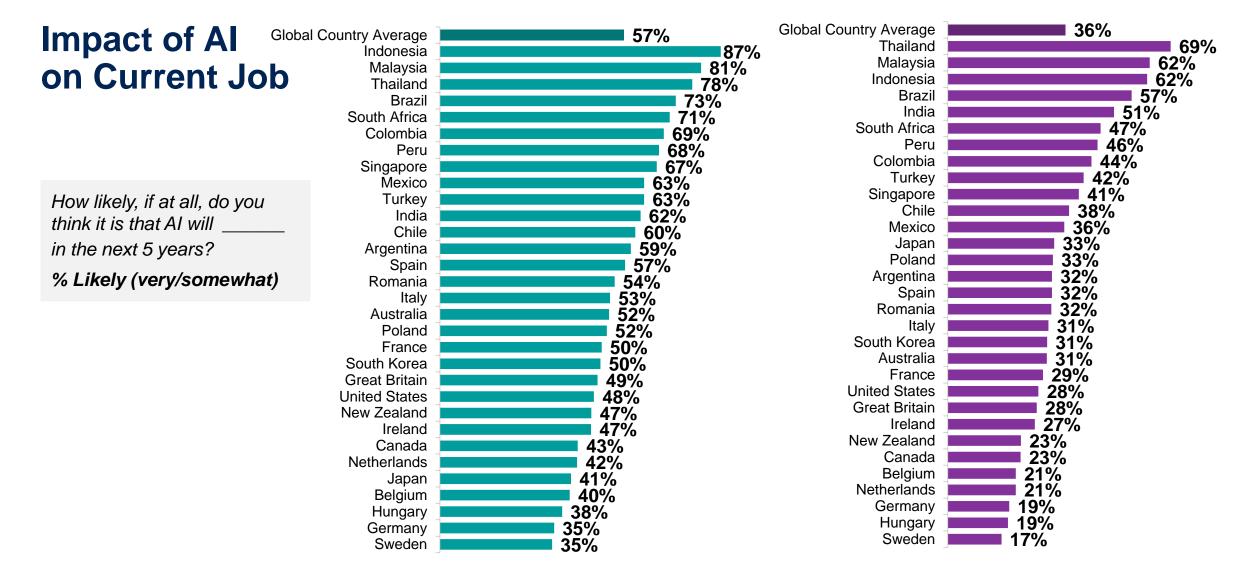


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Al will change how you do your current job

Al will replace your current job

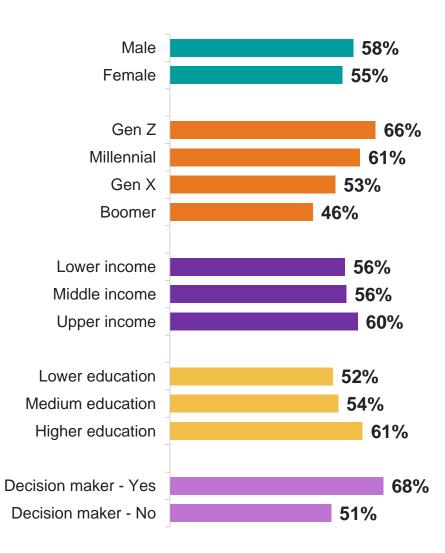


Base: 14,782 employed adults under the age of 75 across 31 countries, interviewed May 26 - June 9, 2023 -- online only in all countries except India

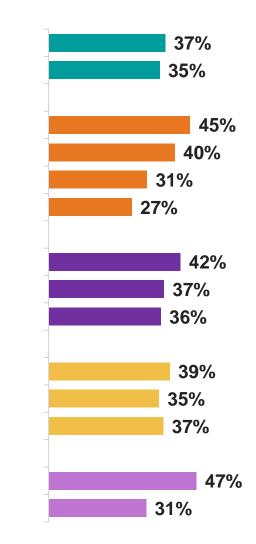
Al will change how you do your current job

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)



Al will replace your current job

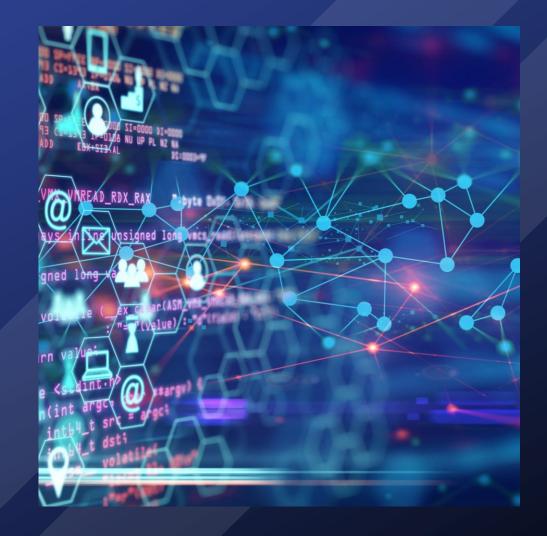


Base: 14,782 employed adults under the age of 75 across 31 countries, interviewed May 26 - June 9, 2023 -- online only in all countries except India.

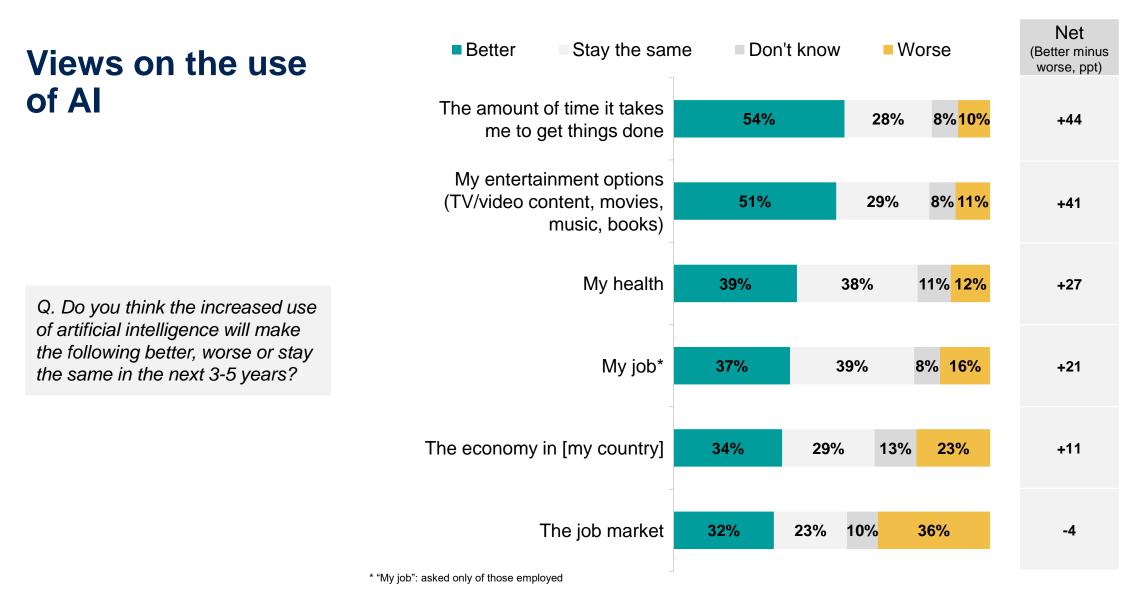


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Will Al improve life?







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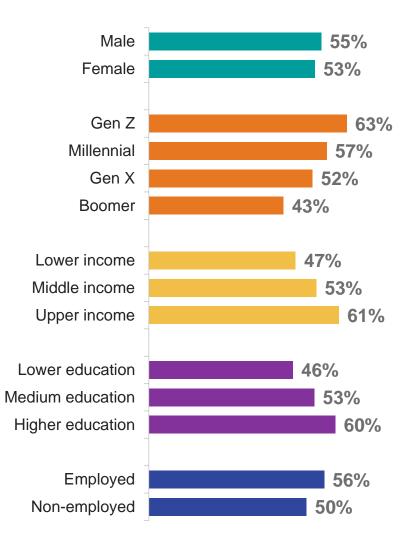
AI and My Time

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)

| 72% 71% |
|------------|
| |
| |
| 71% |
| 70% |
| 8% |
| 7% |
| 5% |
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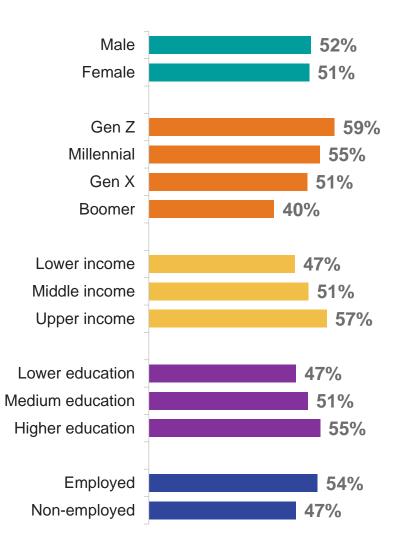
Al and My Entertainment Options

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)

| Glo | bal Country Average | 51% |
|----------|---------------------|-----|
| | Peru | 71% |
| | Indonesia | 71% |
| | Mexico | 68% |
| | Thailand | 68% |
| | South Africa | 66% |
| | Brazil | 64% |
| | Colombia | 64% |
| | Argentina | 63% |
| se | Chile | 63% |
| 50 | Turkey | 60% |
| | Malaysia | 57% |
| ly l | India | 57% |
| , | Singapore | 57% |
| | South Korea | 54% |
| | Spain | 51% |
| | Netherlands | 50% |
| | New Zealand | 47% |
| | Romania | 46% |
| | Great Britain | 45% |
| | Italy | 45% |
| | Ireland | 44% |
| | Australia | 43% |
| | Canada | 42% |
| | Hungary | 41% |
| | Poland | 40% |
| | United States | 40% |
| | Germany | 39% |
| | Sweden | 37% |
| | Belgium | 37% |
| | Japan | 33% |
| | France | 32% |
| | | |



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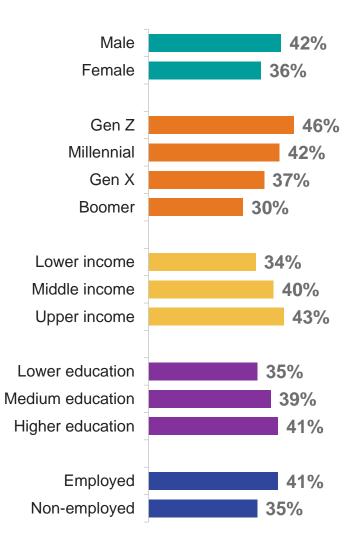
AI and My Health

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)

| Glo | bal Country Average | 39% |
|-----|---------------------|-----|
| | Mexico | 61% |
| | Indonesia | 58% |
| | Thailand | 56% |
| | Peru | 55% |
| | Brazil | 55% |
| | India | 50% |
| | Colombia | 50% |
| se | Malaysia | 49% |
| | South Africa | 49% |
| ., | Turkey | 47% |
| у | Argentina | 47% |
| | Chile | 47% |
| | Romania | 43% |
| | Singapore | 40% |
| | South Korea | 38% |
| | Italy | 37% |
| | France | 37% |
| | Spain | 33% |
| | Great Britain | 33% |
| | United States | 32% |
| | New Zealand | 31% |
| | Netherlands | 30% |
| | Canada | 29% |
| | Ireland | 29% |
| | Australia | 29% |
| | Belgium | 28% |
| | Hungary | 28% |
| | Sweden | 25% |
| | Germany | 25% |
| | Poland | 23% |
| | Japan | 16% |
| | | |



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.

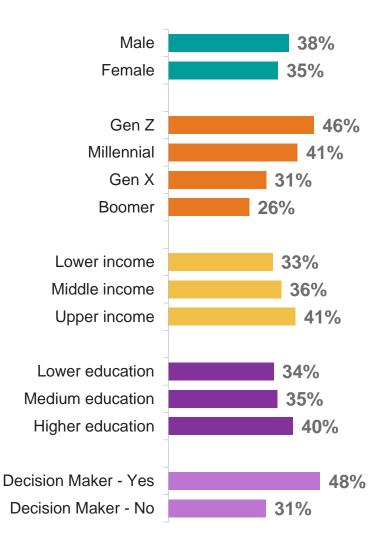
Al and My Job

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)

| <u> </u> | | |
|----------|--------------------|-----|
| Glob | al Country Average | 37% |
| | Thailand | 66% |
| | Indonesia | 62% |
| | Peru | 56% |
| | Brazil | 55% |
| | Mexico | 52% |
| | South Africa | 51% |
| _ | India | 48% |
| se | Turkey | 47% |
| the | Malaysia | 47% |
| е | Colombia | 41% |
| C | Singapore | 41% |
| | Argentina | 36% |
| | Chile | 36% |
| | Great Britain | 32% |
| | Italy | 32% |
| | Australia | 30% |
| | Romania | 30% |
| | New Zealand | 30% |
| | Poland | 30% |
| | United States | 28% |
| | Sweden | 28% |
| | Spain | 27% |
| | France | 26% |
| | Netherlands | 25% |
| | Canada | 25% |
| | Ireland | 24% |
| | Hungary | 24% |
| | South Korea | 23% |
| | Germany | 23% |
| | Belgium | 21% |
| | Japan | 19% |
| | | |



* "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.

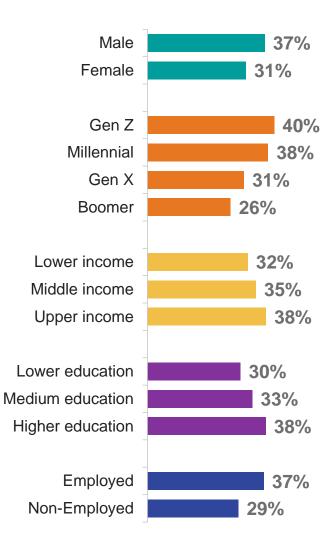
AI and the Economy

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)

| Indonesia India Brazil Singapore Malaysia Mexico Peru Colombia South Africa Turkey South Korea Romania Malaysia 40% | Global | Country Average | 34% |
|--|--------|-----------------|-----|
| India Brazil Brazil Singapore Malaysia Mexico Mexico Peru Colombia South Africa South Africa South Africa South Korea Turkey South Korea Romania Great Britain Chile Poland Chile Poland Chile South Korea Romania Chile Poland Chile South Korea South Korea Romania Chile Poland Chile South Korea South Korea South Korea South Korea South Korea Chile South Korea South South South Korea South Korea South Korea South Korea South Korea South Korea South Korea South Korea South Korea South S | | Thailand | 62% |
| Brazil51%Singapore50%Malaysia50%Mexico48%Peru46%Colombia40%South Africa39%South Korea34%Romania34%Romania31%Chile31%Poland29%Italy29%Argentina28%Germany27%New Zealand28%Germany27%Netherlands27%Australia26%Hungary25%Ireland25%Spain25%France24%United States23%Japan22%Sweden21%Canada20% | | Indonesia | |
| Singapore Malaysia50% 50%Mexico Mexico48%Peru Colombia46%Colombia South Africa39%South Africa Turkey39%South Korea Romania34%Romania Chile31%Chile Poland29%Italy Argentina28%New Zealand Germany27%Netherlands Australia27%Australia Spain25%France United States Japan Sweden Canada23%Sweden Canada21% | | India | |
| Malaysia50%Mexico48%Peru46%Colombia40%South Africa39%Turkey39%South Korea34%Romania34%Great Britain31%Poland29%Italy29%Argentina28%New Zealand28%Germany27%Netherlands27%Australia26%Hungary25%France24%United States23%Japan22%Sweden23%Japan22%Sweden21%Canada20% | | Brazil | |
| Malaysia50%Mexico48%Peru46%Colombia40%South Africa39%Turkey39%South Korea34%Romania34%Great Britain31%Poland29%Italy29%Argentina28%New Zealand28%Germany27%Netherlands27%Australia26%Hungary25%France24%United States23%Japan22%Sweden23%Japan22%Sweden21%Canada20% | | Singapore | 50% |
| Mexico48%e ofPeru46%Colombia40%South Africa39%Turkey39%South Korea34%Romania34%Great Britain31%Chile31%Poland29%Italy29%Argentina28%Germany27%New Zealand28%Germany27%Netherlands27%Australia26%Hungary25%France24%United States23%Japan22%Sweden21%Canada20% | | Malaysia | 50% |
| Colombia South Africa Turkey40%South Africa Turkey39%South Korea Romania34%Romania34%Great Britain Chile31%Poland Italy29%Argentina Germany28%New Zealand Germany28%Netherlands Australia27%Netherlands Spain25%France Japan Canada23%Japan Canada22%Sweden Canada21%20%21% | - | Mexico | 48% |
| South Africa Turkey South Korea Romania Romania Great Britain Chile Poland Italy Argentina New Zealand Germany Netherlands Australia Hungary Ireland Spain France United States Japan Sweden Canada | e of | Peru | 46% |
| South Africa39%Turkey39%South Korea34%Romania34%Romania31%Chile31%Poland29%Italy29%Argentina28%New Zealand28%Germany27%Netherlands27%Australia26%Hungary25%Ireland25%Spain25%France23%Japan22%Sweden21%Canada20% | ڊ ڊ | Colombia | 40% |
| Turkey South Korea Romania39%South Korea Romania34%Romania Great Britain Chile31%Poland Italy29%Argentina Germany28%New Zealand Germany28%Australia Hungary27%Netherlands Spain France25%Spain Japan Sweden Canada23%Japan Canada22%Sweden Canada21% | | South Africa | 39% |
| South Korea Romania34%Romania34%Great Britain Chile31%Poland29%Italy29%Argentina28%New Zealand28%Germany Netherlands27%Australia26%Hungary Ireland25%Spain France25%United States Japan Sweden Canada23%Japan Canada22%Sweden Canada21% | Э | Turkey | 39% |
| Romania Great Britain Chile34%Great Britain Chile31%Poland29%Italy29%Argentina New Zealand28%New Zealand Germany Netherlands27%Australia Hungary Ireland Spain France26%United States Japan Sweden Canada23%Japan Canada22%20%21% | | South Korea | 34% |
| Great Britain Chile31% 31%Poland29% 1talyItaly29% 29%Argentina28% 28%New Zealand28% 27%Germany Netherlands27% 25%Hungary Ireland Spain France25% 25%United States Japan Sweden Canada23%Japan Canada22% 20% | _ | Romania | 34% |
| Chile31%Poland29%Italy29%Argentina28%New Zealand28%Germany27%Netherlands27%Australia26%Hungary25%Ireland25%Spain25%France24%United States23%Japan22%Sweden21%Canada20% | trv1 | Great Britain | 31% |
| Italy29%Argentina28%New Zealand28%Germany27%Netherlands27%Australia26%Hungary25%Ireland25%Spain25%France24%United States23%Japan22%Sweden21%Canada20% | | Chile | 31% |
| Italy29%Argentina28%New Zealand28%Germany27%Netherlands27%Australia26%Hungary25%Ireland25%Spain25%France24%United States23%Japan22%Sweden21%Canada20% | | Poland | 29% |
| New Zealand28%Germany27%Netherlands27%Australia26%Hungary25%Ireland25%France24%United States23%Japan22%Sweden21%Canada20% | | Italy | |
| New Zealand28%Germany27%Netherlands27%Australia26%Hungary25%Ireland25%France24%United States23%Japan22%Sweden21%Canada20% | | Argentina | |
| Germany Netherlands27%Australia26%Australia26%Hungary25%Ireland25%Spain25%France24%United States23%Japan22%Sweden Canada21% | | New Zealand | |
| Netherlands27%Australia26%Hungary25%Ireland25%Spain25%France24%United States23%Japan22%Sweden21%Canada20% | | Germany | |
| Australia26%Hungary25%Ireland25%Spain25%France24%United States23%Japan22%Sweden21%Canada20% | | | |
| Hungary25%Ireland25%Spain25%France24%United States23%Japan22%Sweden21%Canada20% | | Australia | 26% |
| Ireland Spain France United States Japan Sweden Canada | | Hungary | 25% |
| Spain France 24% United States Japan Sweden Canada 20% | | Ireland | 25% |
| France 24% United States 23% Japan 22% Sweden 21% Canada 20% | | Spain | 25% |
| Japan 22% Sweden 21% Canada 20% | | France | |
| Japan 22% Sweden 21% Canada 20% | | United States | 23% |
| Canada 20% | | Japan | |
| Canada 20% | | Sweden | 21% |
| Belgium 18% | | Canada | |
| | | Belgium | 18% |



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.

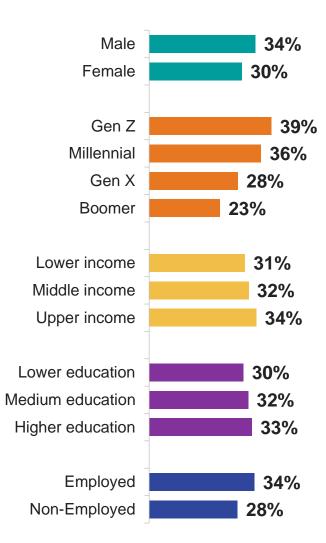
Al and the Job Market

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

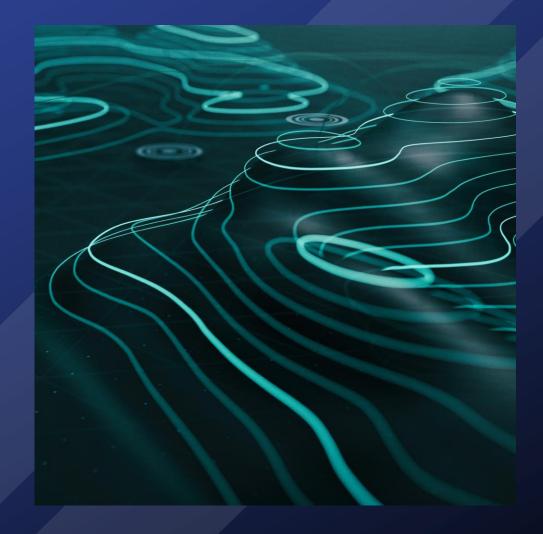
% Better (much/somewhat)

| Glo | bal Country Average | 32% |
|-----|---------------------|-----|
| | Peru | 54% |
| | Mexico | 54% |
| | Thailand | 53% |
| | Turkey | 50% |
| | Indonesia | 50% |
| | Brazil | 49% |
| | India | 49% |
| se | Malaysia | 39% |
| | South Africa | 38% |
| ., | Colombia | 38% |
| у | Argentina | 38% |
| | Singapore | 37% |
| | Romania | 33% |
| | Chile | 32% |
| | Italy | 30% |
| | Poland | 26% |
| | Hungary | 24% |
| | Spain | 23% |
| | Netherlands | 23% |
| | Ireland | 22% |
| | New Zealand | 22% |
| | Japan | 22% |
| | Great Britain | 21% |
| | France | 21% |
| | Sweden | 21% |
| | United States | 21% |
| | Australia | 20% |
| | Germany | 20% |
| | Canada | 19% |
| | Belgium | 18% |
| | South Korea | 17% |
| | | |



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.

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% 6 | 62% | 73% (| 69% ⁻ | 77% | 67% | 78% | 76% | 66% | 67% | 78% 7 | 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% 7 | 71% (| 63% (| 61% | 76% : | 59% ⁻ | 73% | 78% | 70% | 82% | 61% | 55% | 79% 8 | 31% 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% 4 | 45% | 72% : | 59% | 63% | 63% | 65% | 55% | 51% | 33% 8 | 83% 6 | 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% 7 | 73% 4 | 43% 4 | 14% (| 67% 4 | 47% | 61% | 64% | 59% | 66% | 50% | 39% | 74% 6 | 87% 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% 4 | 13% | 72% : | 50% | 62% | 65% | 59% ⁻ | 76% | 50% | 32% 8 | 30% 7 | 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% 4 | 13% (| 50% t | 50% | 62% | 57% | 55% | 55% | 49% | 42% | 73% 6 | 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% 4 | 18% : | 50% 6 | 63% 4 | 47% (| 38% : | 50% | 53% | 53% - | 44% | 51% | 53% ! | 57% క | 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% 4 | 46% | 62% | 57% | 60% | 68% | 46% | 36% | 73% 7 | 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% <i>4</i> | 47% 4 | 42% (| 50% t | 55% | 61% | 54% | 58% | 40% | 49% | 39% | 72% క | 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% 4 | 46% : | 54% | 64% | 57% | 73% | 41% | 31%] | 72% 6 | 3% 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.

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.

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 socioeconomic 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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