CHAPTER 8:
Public Opinion

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Public Opinion

Overview

As AI continues to permeate broad swaths of society, it is becoming increasingly important to understand public sentiment around the technology. Insights into how people perceive AI can help anticipate its societal impact and reveal how adoption varies across countries and demographic groups. Early data suggests growing public anxiety about AI, with some regions expressing significantly more pessimism than others. As the technology continues to advance, will these trends persist?

This chapter explores public opinion on AI through global, national, demographic, and ethnic perspectives. It draws on multiple data sources, including longitudinal Ipsos surveys tracking global AI attitudes, American Automobile Association surveys on self-driving vehicles, and recent research into local U.S. policymakers' views on AI.

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Chapter Highlights

1. The world grows cautiously optimistic about AI products and services. Among the 26 nations surveyed by Ipsos in both 2022 and 2024, 18 saw an increase in the proportion of people who believe AI products and services offer more benefits than drawbacks. Globally, the share of individuals who see AI products and services as more beneficial than harmful has risen from 52% in 2022 to 55% in 2024.

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2. The expectation and acknowledgment of AI's impact on daily life is rising. Around the world, two thirds of people now believe that AI-powered products and services will significantly impact daily life within the next three to five years—an increase of six percentage points since 2022. Every country except Malaysia, Poland, and India saw an increase in this perception since 2022, with the largest jumps in Canada (17%) and Germany (15%).

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3. Skepticism about the ethical conduct of AI companies is growing, while trust in the fairness of AI is declining. Globally, confidence that AI companies protect personal data fell from 50% in 2023 to 47% in 2024. Likewise, fewer people today believe that AI systems are unbiased and free from discrimination compared to last year.

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4. Regional differences persist regarding AI optimism. First reported in the 2023 AI Index, significant regional differences in AI optimism endure. A large majority of people believe AI-powered products and services offer more benefits than drawbacks in countries like China (83%), Indonesia (80%), and Thailand (77%), while only a minority share this view in Canada (40%), the United States (39%), and the Netherlands (36%).

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5. People in the United States remain distrustful of self-driving cars. A recent American Automobile Association survey found that 61% of people in the U.S. fear self-driving cars, and only 13% trust them. Although the percentage who express fear has declined from its 2023 peak of 68%, it remains higher than in 2021 (54%).

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6. There is broad support for AI regulation among local U.S. policymakers. In 2023, 73.7% of local U.S. policymakers—spanning township, municipal, and county levels—agreed that AI should be regulated, up significantly from 55.7% in 2022. Support was stronger among Democrats (79.2%) than Republicans (55.5%), though both registered notable increases over 2022.

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Chapter Highlights (cont'd)

7. AI optimism registers sharp increase among countries that previously showed the most skepticism. Globally, optimism about AI products and services has increased, with the sharpest gains in countries that were previously the most skeptical. In 2022, Great Britain (38%), Germany (37%), the United States (35%), Canada (32%), and France (31%) were among the least likely to view AI as having more benefits than drawbacks. Since then, optimism has grown in these countries by 8%, 10%, 4%, 8%, and 10%, respectively.

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8. Workers expect AI to reshape jobs, but fear of replacement remains lower. Globally, 60% of respondents agree that AI will change how individuals do their job in the next five years. However, a smaller subset of respondents, 36%, believe that AI will replace their jobs in the next five years.

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9. Sharp divides exist among local U.S. policymakers on AI policy priorities. While local U.S. policymakers broadly support AI regulation, their priorities vary. The strongest backing is for stricter data privacy rules (80.4%), retraining for the unemployed (76.2%), and AI deployment regulations (72.5%). However, support drops significantly for a law enforcement facial recognition ban (34.2%), wage subsidies for wage declines (32.9%), and universal basic income (24.6%).

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10. AI is seen as a time saver and entertainment booster, but doubts remain on its economic impact. Global perspectives on AI's impact vary. While 55% believe it will save time, and 51% expect it will offer better entertainment options, fewer are confident in its health or economic benefits. Only 38% think AI will improve health, whilst 36% think AI will improve the national economy, 31% see a positive impact on the job market, and 37% believe it will enhance their own jobs.

8.1 Public Opinion

Global Public Opinion

This section explores global differences in opinions on AI through surveys conducted by Ipsos in 2022, 2023, and 2024. These surveys reveal that public perceptions of AI vary widely across countries and demographic groups.

AI Products and Services

In 2024, Ipsos ran a survey on global attitudes toward AI. The survey consisted of interviews with 23,685 adults across 32 countries.[1]

Figure 8.1.1 shows the percentage of respondents who agree with specific statements. The increase in public awareness of AI between 2022 and 2024 has remained relatively consistent.

In 2024, 67% of respondents report a good understanding of what AI is, and 66% anticipate that AI will profoundly change their daily life in the near future. The proportion of the global population that perceives AI-powered products and services as having more benefits than drawbacks has increased modestly, rising from 52% in 2022 to 55% in 2024.

Figure 8.1.1 also highlights respondents' growing concerns. In the last year, there has been a three percentage point decrease in those who trust that companies using AI will protect their personal data and a two percentage point decrease in respondents' trust that AI will not discriminate or show bias toward any group of people.

Global opinions on products and services using AI (% of total), 2022–24

Source: Ipsos, 2022–24 | Chart: 2025 AI Index report

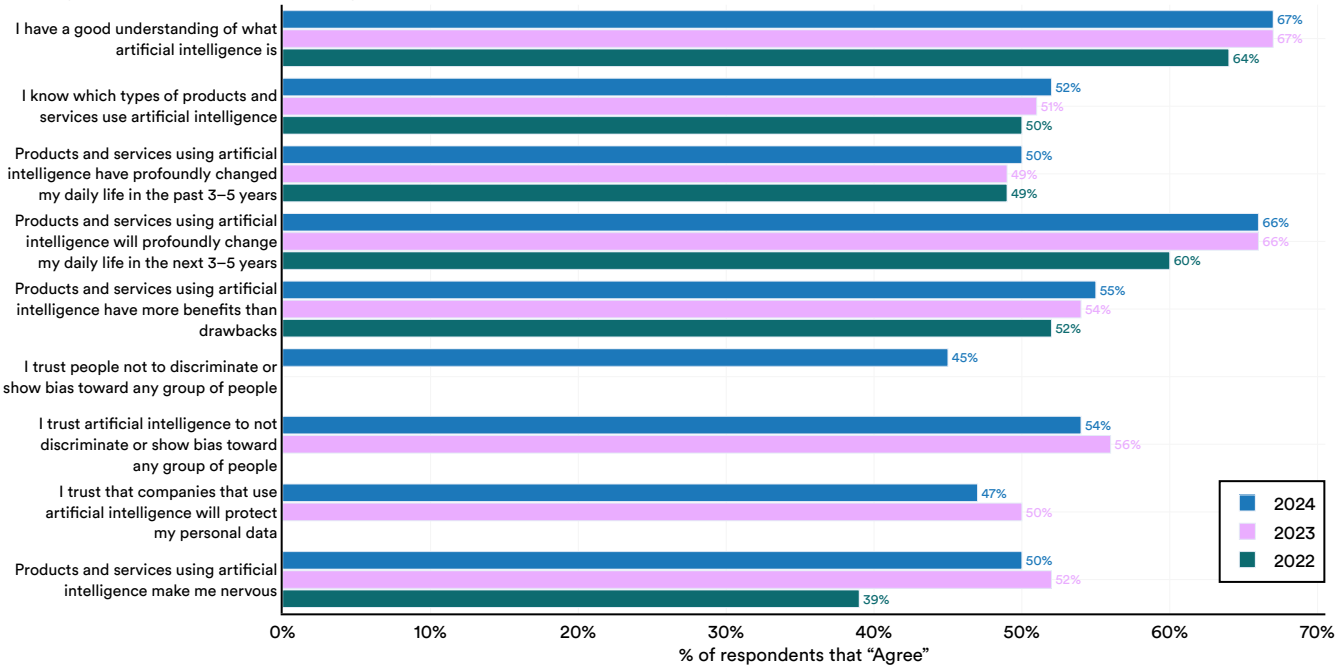

Figure 8.1.1

1 See Appendix for more details about the survey methodology. The survey was conducted from April to May, 2024.

Perceptions of AI's benefits versus drawbacks vary considerably by country, according to the Ipsos survey. In general, respondents in Asia and Latin America believe that AI will have more benefits than drawbacks: 83% of Chinese, 70% of Mexican, and 62% of Indian respondents view AI products and services as more beneficial than harmful (Figure 8.1.2). In contrast, in Europe and the Anglosphere, respondents are more skeptical. For example, 46% of British, 44% of Australian, 40% of Canadian, and 39% of American respondents believe that AI will have more benefits than drawbacks.

AI sentiment appears to be warming, particularly in countries that were once the most skeptical. Among the 26 nations surveyed by Ipsos in both 2022 and 2024, 18 saw an increase in the proportion of people who believe AI products and services offer more benefits than drawbacks. In 2022, France (31%), Canada (32%), the United States (35%), Germany (37%), Australia (37%), and Great Britain (38%) ranked among the least optimistic about AI. By 2024, the percentages in all these countries had risen.

'Products and services using AI have more benefits than drawbacks,' by country (% of total), 2022–24

Source: Ipsos, 2022–24 | Chart: 2025 AI Index report

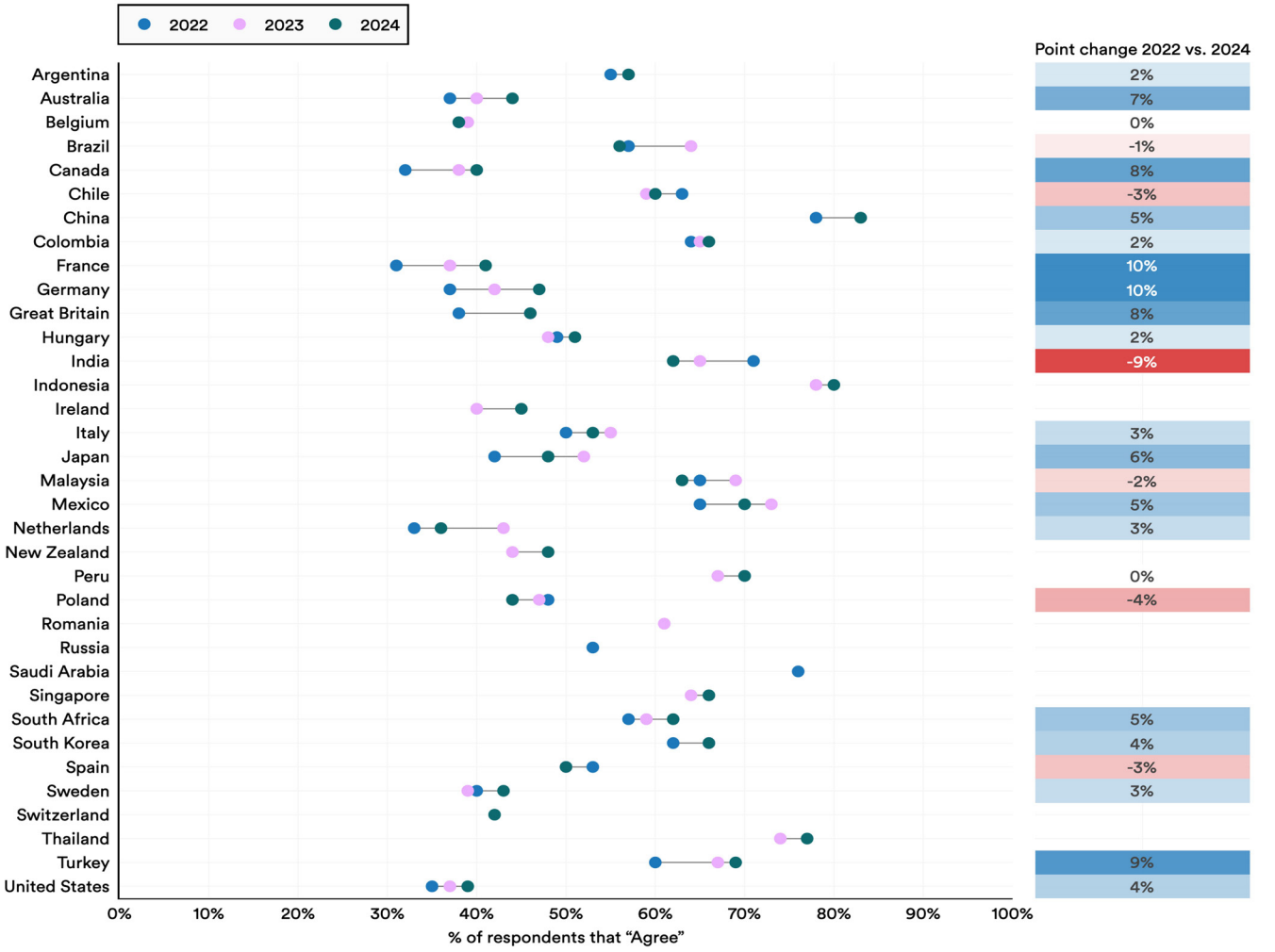

Figure 8.1.2

Figure 8.1.3 shows responses to Ipsos' survey on AI products and services by country. On average, survey respondents in China had the highest level of awareness, trust, and excitement about AI's use in products and services: 81% of respondents in China knew what products and services use AI, 80% reported that those products and services made them excited, 76% trusted AI to not discriminate or show bias, and overall 86% believed that products and services using AI would profoundly change their daily life in the next three to five years. Conversely, just 58% of American respondents thought that AI would profoundly change their life in the next three to five years, and 34% reported that products and services using AI made them excited.

Concerns about the privacy of personal data appear to be strongest in Japan and Canada, while concerns about AI discriminating against certain groups was highest in Sweden and Belgium.

Opinions about AI by country (% agreeing with statement), 2024
Source: Ipsos, 2024 | Chart: 2025 AI Index report

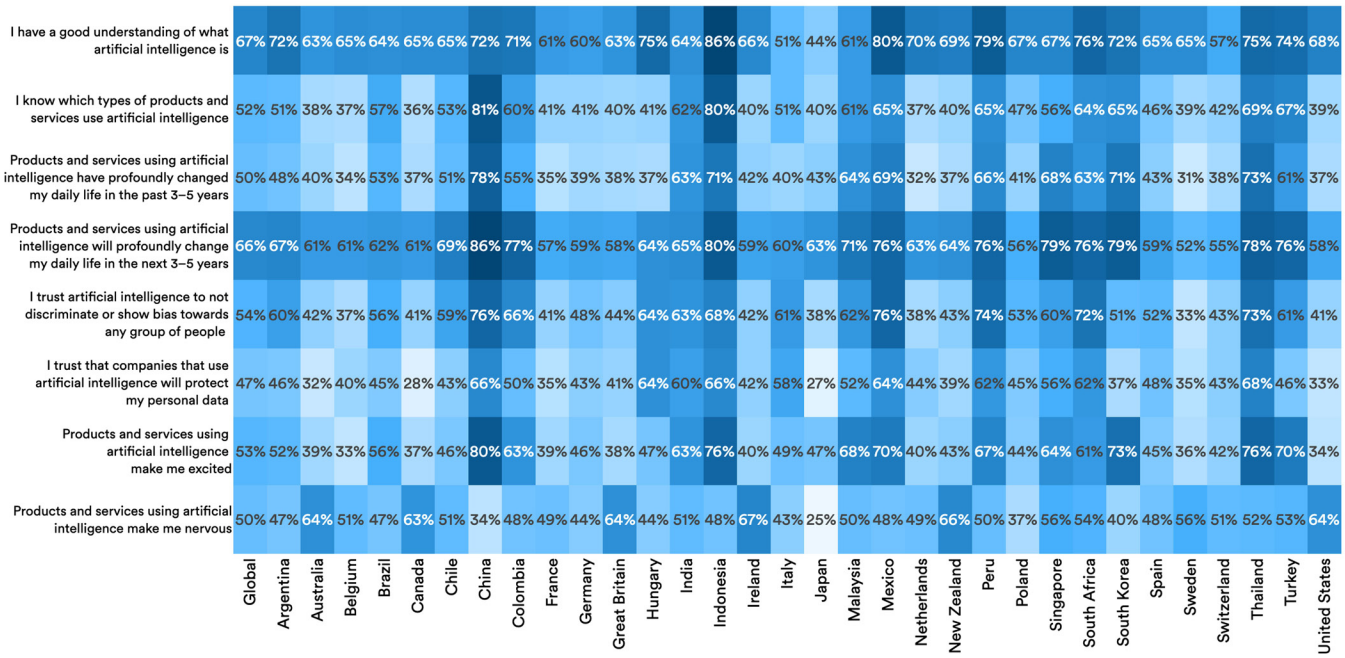

Figure 8.1.3

Figure 8.1.4 illustrates respondents' answers to whether they are excited about AI and whether they are nervous about it. Notable cross-country trends emerge. As previously noted, many Anglosphere nations—such as the United Kingdom, the United States, Canada, Australia, and New Zealand—report the highest levels of nervousness and the lowest excitement about AI. In contrast, several Asian countries, including China, South Korea, and Indonesia, exhibit higher excitement and lower nervousness levels, with Japan standing as an exception to this trend.

Global opinions about products and services using AI by country, 2024

Source: Ipsos, 2024 | Chart: 2025 AI Index report

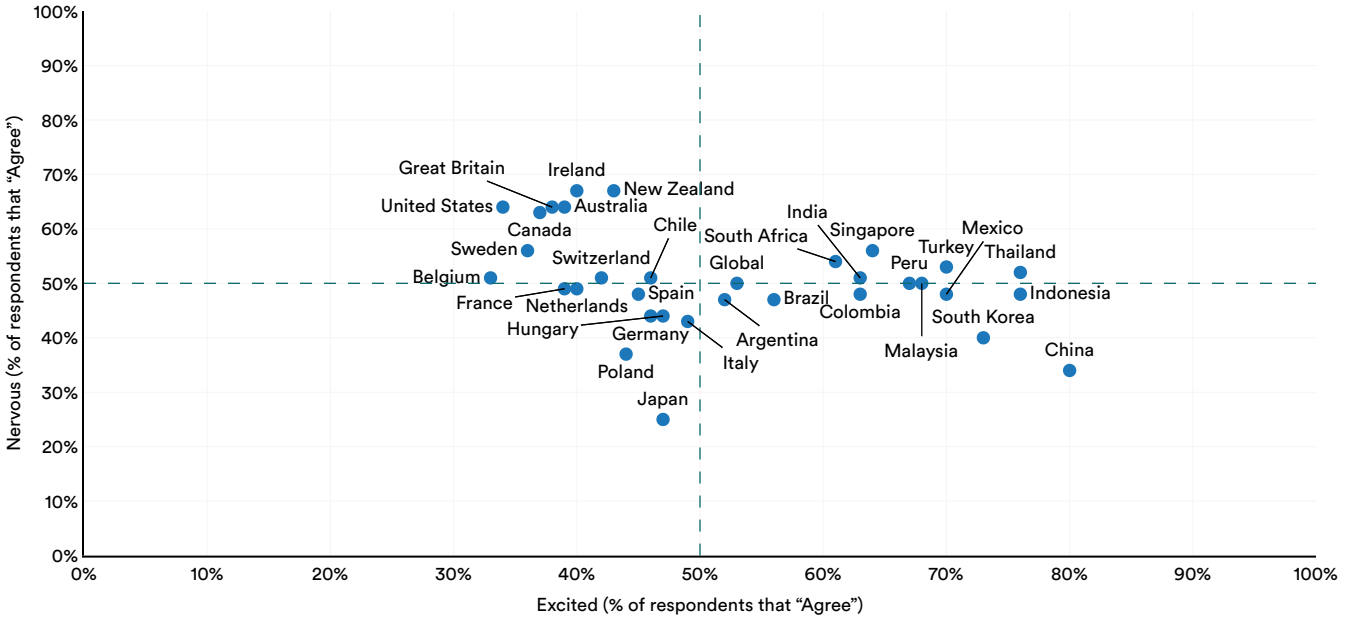

Figure 8.1.4

A majority of the countries surveyed by Ipsos in 2023 were surveyed again in 2024, enabling cross-year comparisons. Figure 8.1.5 highlights the year-over-year change in answers to particular AI-related questions. Overall, the AI Index observes slightly rising concerns about the use of AI, with an average 0.6% decrease in positive responses. This is largely driven by a 3% decrease in trust that companies that use AI will protect personal data, and a 2% decrease in trust that AI will not discriminate or show bias toward any group of people.[2]

Brazil and Malaysia saw the sharpest average decline in awareness, trust, and excitement about AI. In both countries, that negative trend was led by sharp declines in respondents who trust AI companies to protect their personal data.

South Africa and Ireland saw the sharpest average increases in awareness, trust, and excitement about AI. Ireland's positive trend appears to be led by positive user experiences, since it reports the highest increase across countries in respondents who say their daily lives have been profoundly impacted by products and services using AI.

Percentage point change in opinions about AI by country (% agreeing with statement), 2023–24

Source: Ipsos, 2023–24 | Chart: 2025 AI Index report

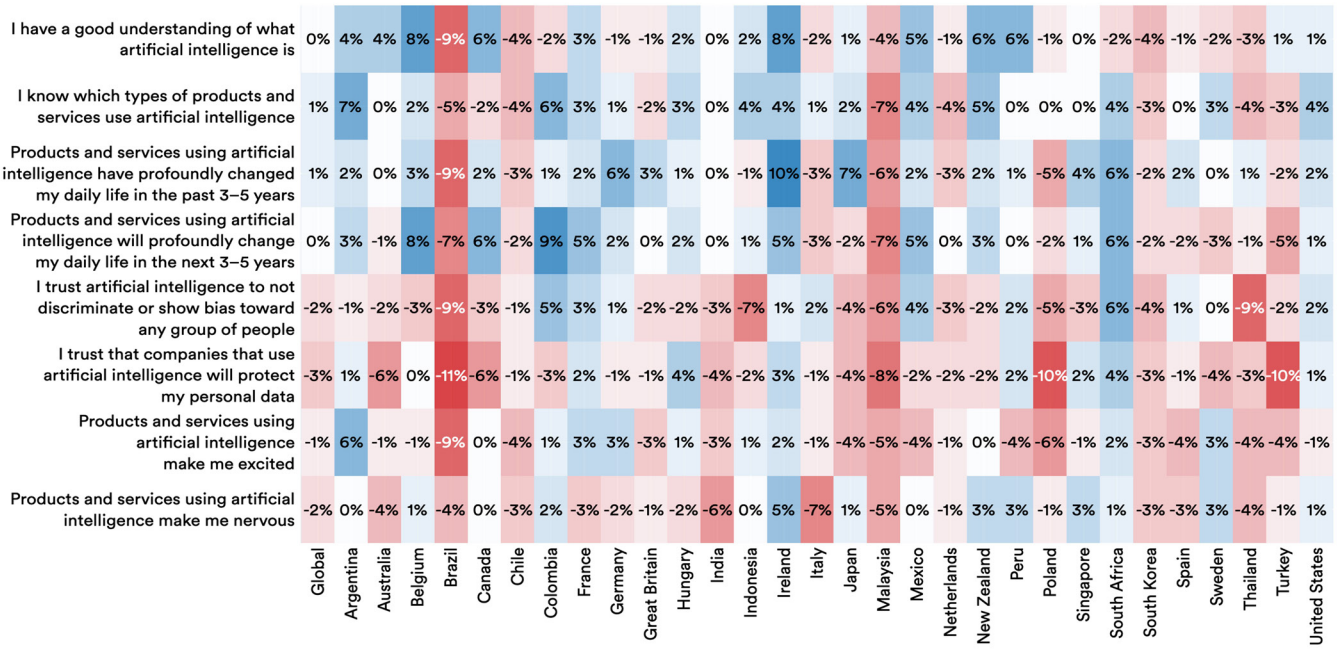

Figure 8.1.5

2 Average global responses to the question "Products and services using AI make me nervous" are excluded from this average because this is the only question where a positive score would yield a normatively negative result.

Figure 8.1.6 compares responses from the 2022 and 2024 Ipsos surveys, highlighting shifts in sentiment since the launch of ChatGPT. Globally, the belief that AI-powered products and services will profoundly change daily life within the next three to five years has risen by 6%. Every country except India, Malaysia, and Poland saw an increase in this perception since 2022, with the largest jumps in Canada (17%) and Germany (15%).

Percentage point change in opinions about AI by country (% agreeing with statement), 2022 vs. 2024
Source: Ipsos, 2022–24 | Chart: 2025 AI Index report

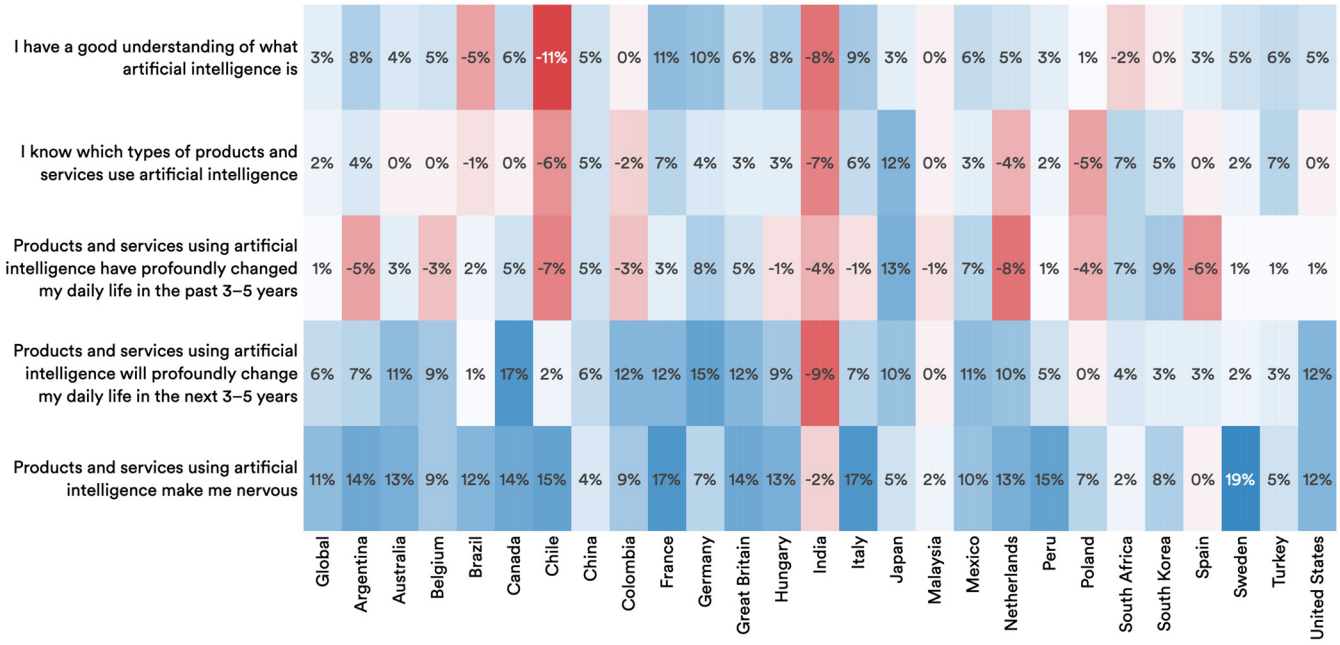

Figure 8.1.6

AI and Jobs

This year's Ipsos survey included more questions about how people perceive AI's impact on their current jobs. Figure 8.1.7 illustrates various global perspectives on the expected impact of AI on employment. Overall, 60% of respondents believe AI is likely to change how they do their job in the next five years and 36%, or more than one in three, believe that AI is likely to replace their current job in the next five years.

Year-over-year comparisons for this question are challenging because in 2023 the survey did not differentiate between "very likely" and "somewhat likely." Nevertheless, when the 2024 categories are aggregated and compared to the 2023 results, the overall sentiment appears largely unchanged. In 2023, 57% of respondents agreed that AI would change how jobs are done, while 36% believed AI was likely to replace their job within five years.

Global opinions on the perceived impact of AI on current jobs, 2024
Source: Ipsos, 2024 | Chart: 2025 AI Index report

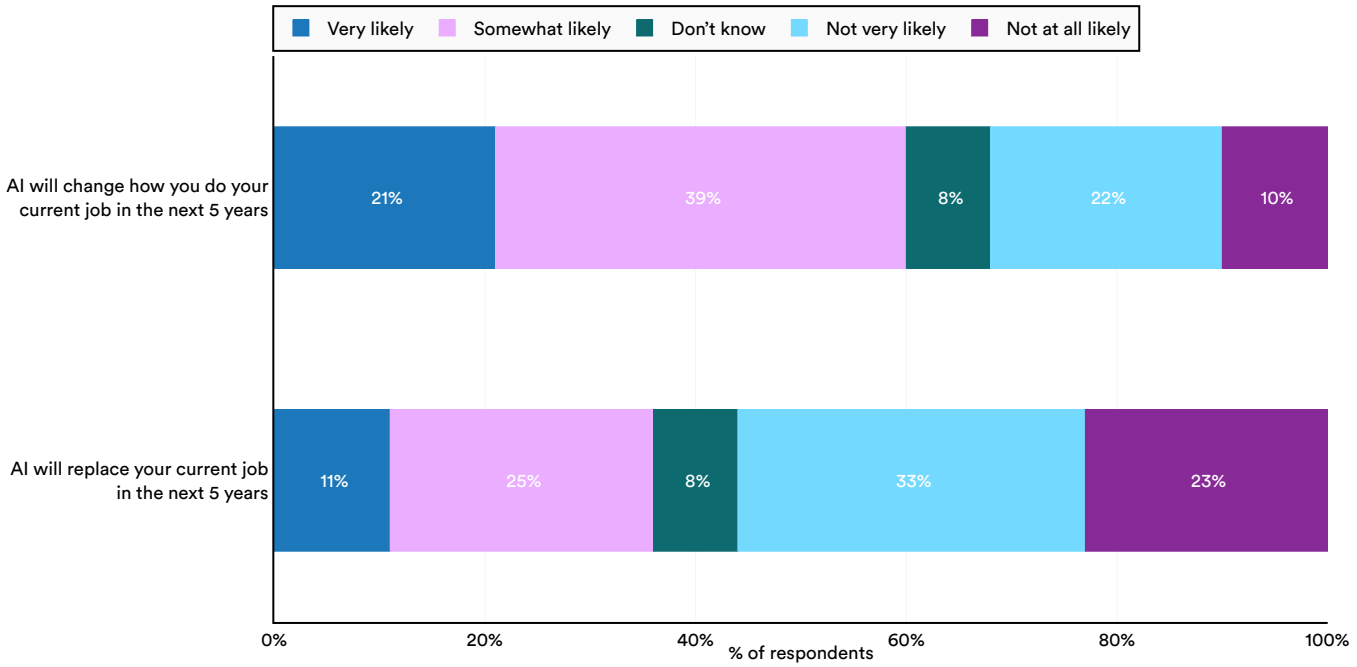

Figure 8.1.7

Opinions on whether AI will significantly impact an individual's job vary across demographic groups (Figure 8.1.8). Younger generations, such as Gen Z and millennials, are more inclined to agree that AI will change how they do their jobs compared to older generations like Gen X and baby boomers. Specifically, in 2024, 67% of Gen Z compared to 49% of boomers agree with the statement that AI will likely affect their current jobs.

Across 2023 and 2024, all generations increasingly agree that AI will change how they do their jobs over the next five years. Interestingly, of the 3% who believe AI will change how they do their jobs, the greatest increase was among both millennials and baby boomers, perhaps indicating increasing cross-generational awareness.

Global opinions on whether AI will change how current jobs are done in the next five years (% agreeing with statement), 2023 vs. 2024

Source: Ipsos, 2024 | Chart: 2025 AI Index report

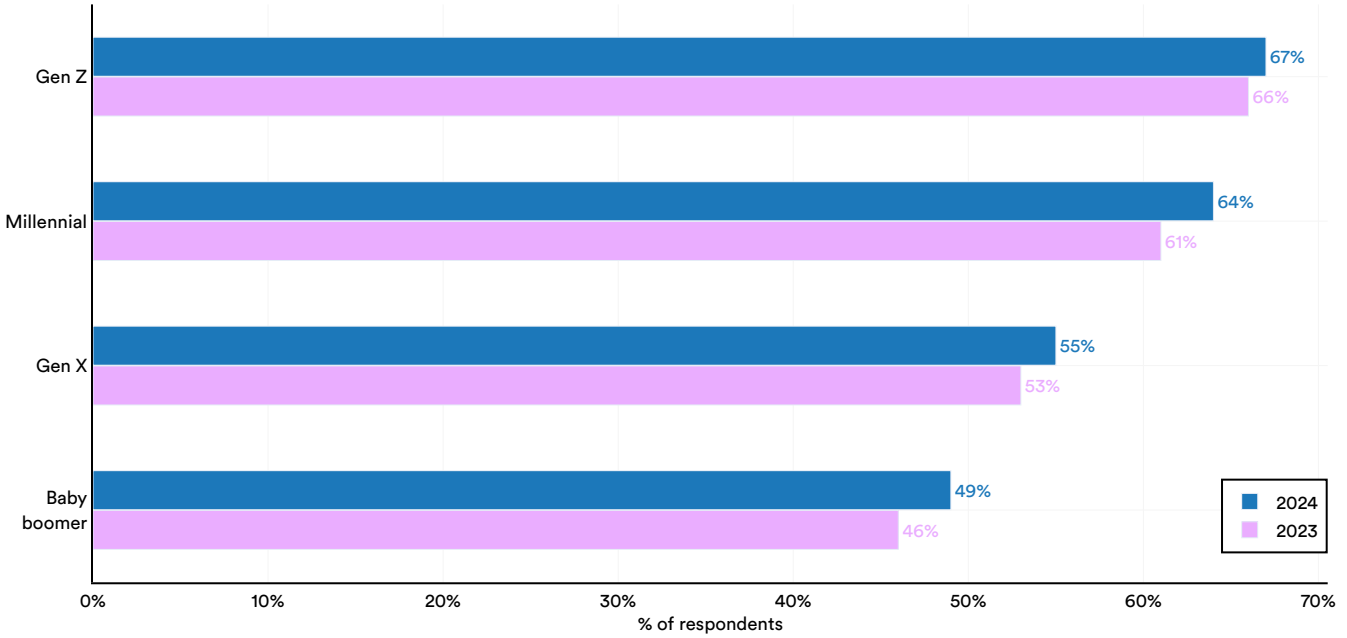

Figure 8.1.8

AI and Livelihood

The Ipsos survey also explored the impact that respondents believe AI will have on various aspects of their lives, such as the economy, entertainment, and health.

Figure 8.1.9 shows that 55% of global respondents said they believe AI will reduce the amount of time it takes them to get things done, and 51% believe AI will improve their entertainment options. Opinions on the economy and the job market were more skeptical. In these sectors, just 36% and 31% of respondents believe AI will have a positive impact.

Figure 8.1.9 also shows significant range in respondents who believe AI will improve the economy in their country. Countries in Asia are the most optimistic about AI's economic impact, with 72% of respondents in China saying they expect AI to improve the economy, followed by 54% in Indonesia. Conversely, less than 25% of respondents in the Netherlands, the United States, Belgium, Sweden, and Canada believe that AI will improve the economy.

Within each country, respondents with an optimistic outlook on AI's impact on the economy tended to express optimism in other areas. For example, countries that expressed the highest expectation that AI will positively impact their economy also tended to believe that AI will reduce the amount of time it takes to get things done and that AI will improve health.

As a global average, 38% of respondents believe AI will improve health. Mexico reported the highest rates of optimism, with 56% believing that AI will have a positive impact on health. Conversely only 19% of respondents in Japan had positive expectations of AI's impact on health.

Global opinions on the potential of AI to improve life by country, 2024
Source: Ipsos, 2024 | Chart: 2025 AI Index report

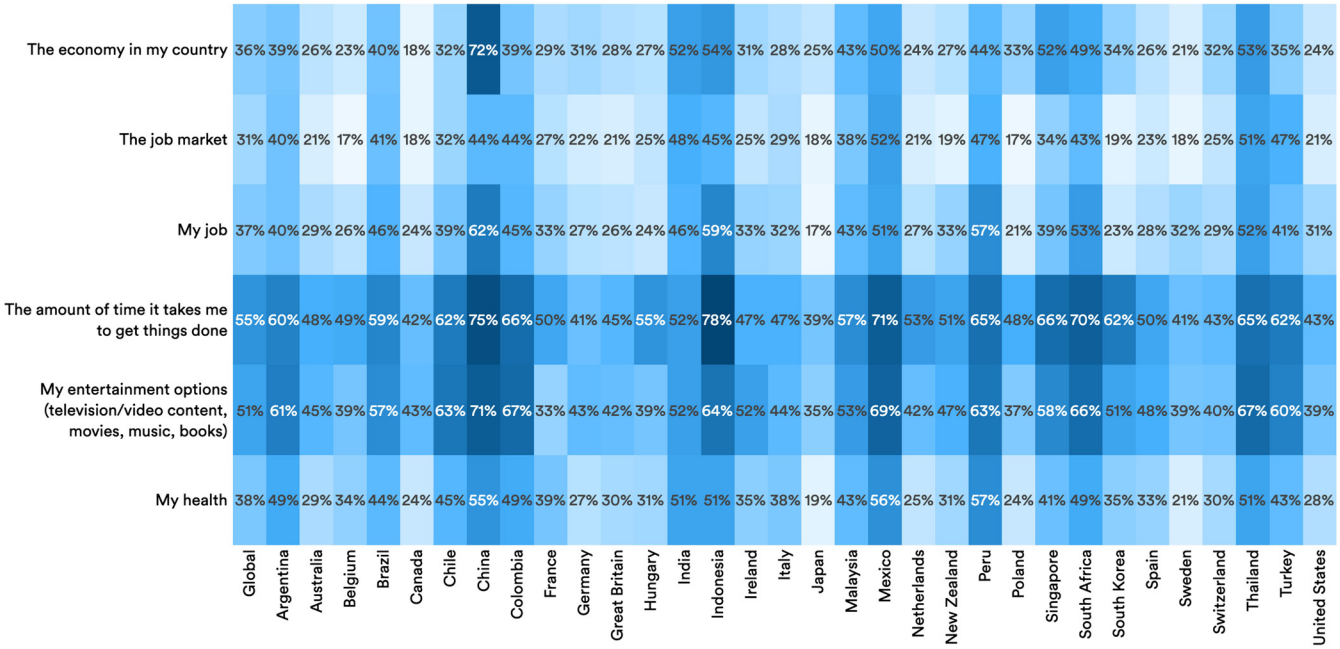

Figure 8.1.9

Figure 8.1.10 and Figure 8.1.11 provide a correlative analysis of the preceding data, examining the extent to which responses to certain questions are interrelated. Notably, there is a strong correlation between respondents' agreement that AI will improve the job market and their belief that it will benefit their own jobs. In some countries, such as Poland, optimism on both fronts is low, with only 17% and 21% of respondents expressing agreement, respectively. In contrast, sentiment is much more positive in China, where 44% believe AI will enhance the job market, and 62% think it will improve their jobs.

Similarly, countries where respondents believe AI will reduce the time required to complete tasks are also more likely to report that AI will improve their individual jobs.

Global opinion on the potential of AI to improve the job market vs. individual jobs, 2024

Source: Ipsos, 2024 | Chart: 2025 AI Index report

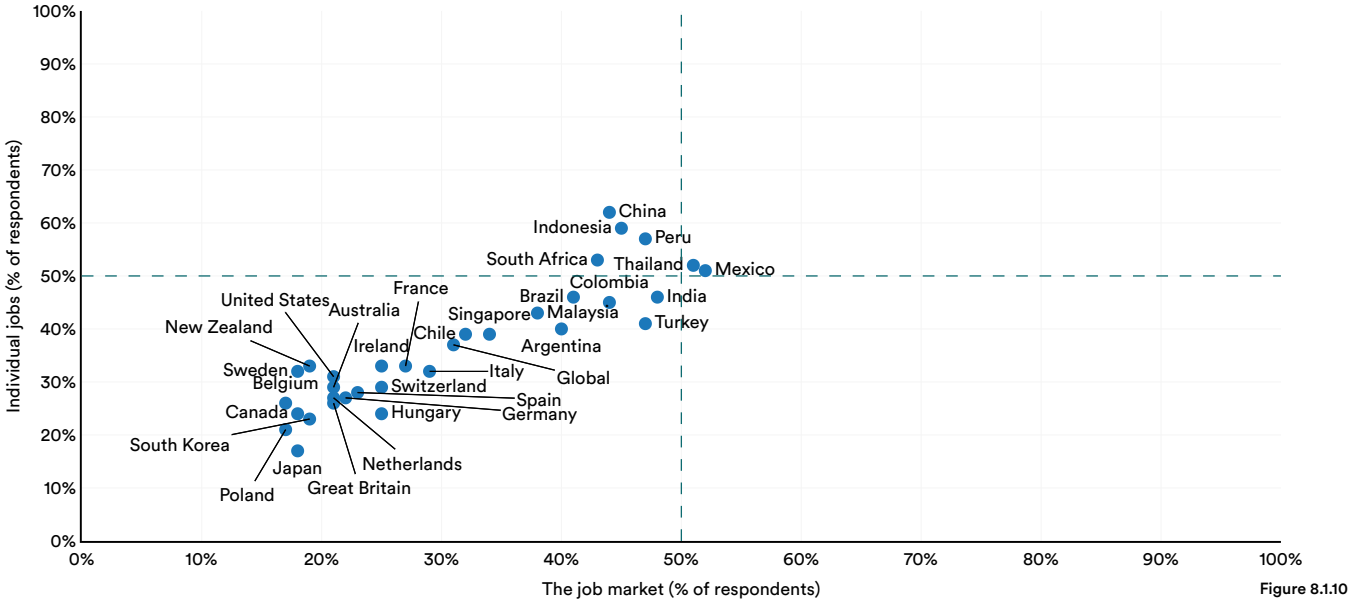

Figure 8.1.10

Global opinion on the potential of AI to improve time to get things done vs. individual jobs, 2024

Source: Ipsos, 2024 | Chart: 2025 AI Index report

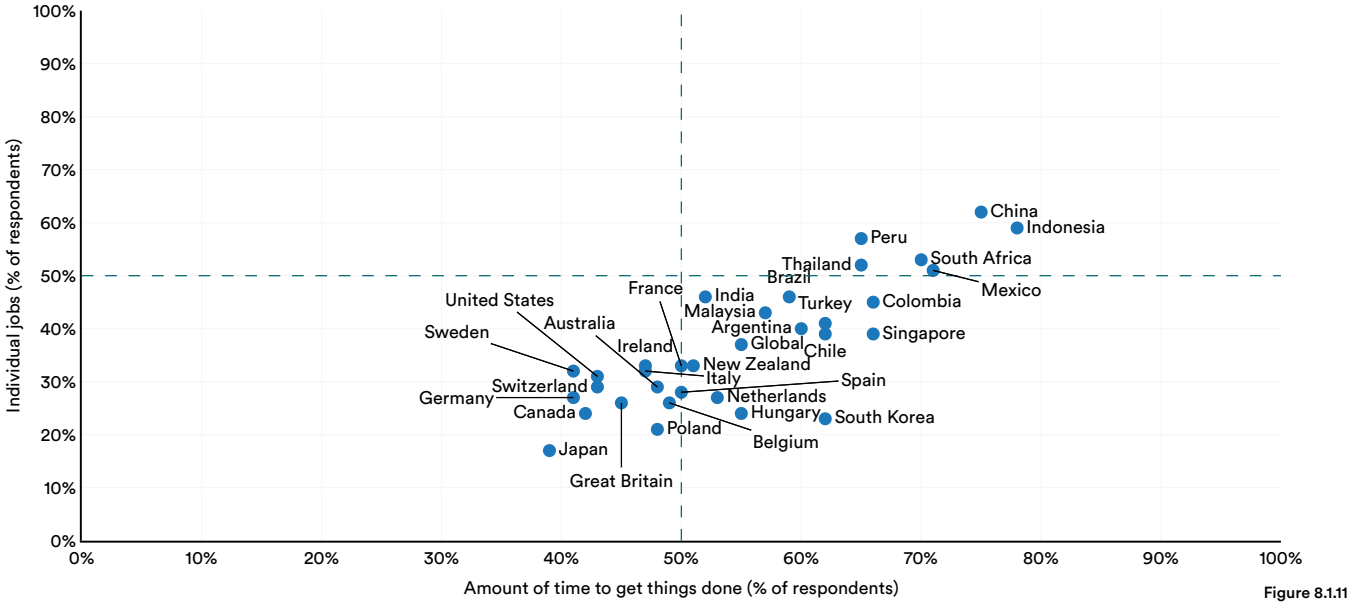

Figure 8.1.11

Highlight:

Self-Driving Cars

As discussed in Chapter 2: Technical Performance, self-driving cars have made significant advancements in both capability and adoption. With companies like Waymo and Zoox becoming more prominent, understanding American attitudes toward self-driving technology is more important than ever.

The American Automobile Association (AAA) conducts an annual survey to assess public sentiment toward self-driving cars. The most recent survey, conducted in January 2025, was designed to be representative of approximately 97% of U.S. households. Figure 8.1.12 presents the results, revealing that despite the gradual rollout of self-driving cars on American roads, a majority of Americans (61%) remain fearful of the technology. Only 13% of respondents expressed trust in self-driving cars. While fear has declined slightly from its 2023 peak of 68%, it remains higher than in 2021, when 54% of Americans reported being afraid.

US driver attitude toward self-driving vehicles, 2021–25
Source: AAA, 2025 | Chart: 2025 AI Index report

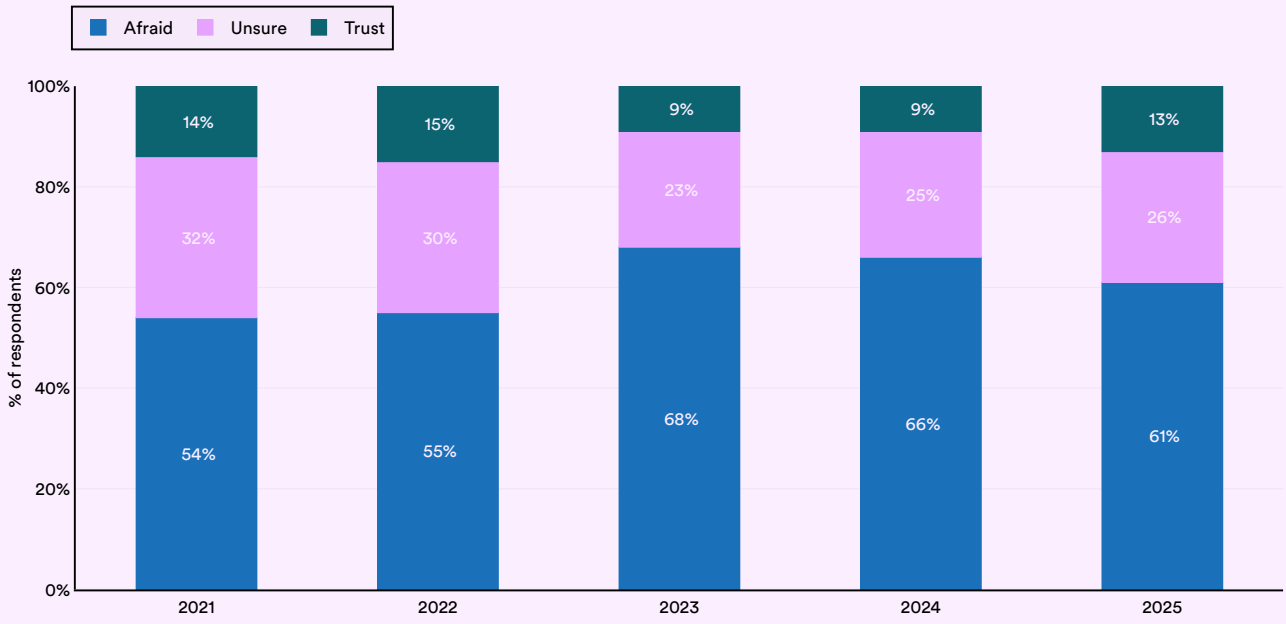

Figure 8.1.12

8.2 US Policymaker Opinion

Understanding public sentiment toward AI requires not only assessing the views of the general public but also those of key stakeholders, such as policymakers, who play a critical role in shaping AI regulation and policy. This year, an international team of researchers from Uppsala, Oxford, Harvard, and Syracuse universities released one of the first comprehensive studies on the perspectives of local U.S. policymakers—spanning township, municipal, and county levels—on AI's future impact and regulation. Conducted in two waves, in 2022 and 2023, the study gathered responses from approximately 1,000 policymakers. Its timing allowed researchers to compare how policymakers' views on AI shifted before and after the launch of ChatGPT.

Figure 8.2.1 illustrates the extent to which local policymakers agree with the statement: AI should be regulated by the government. In 2023, 73.7% of local U.S. policymakers supported this view, a significant increase from 55.7% in 2022. The launch of ChatGPT appears to have played a key role in shifting policymaker sentiment toward regulation. Support for AI regulation was higher among Democrats (79.2%) than Republicans (55.5%), though both groups registered a notable increase after 2022.

Local US officials' support for government regulation of AI by party and year

Source: Hatz et al., 2025 | Chart: 2025 AI Index report

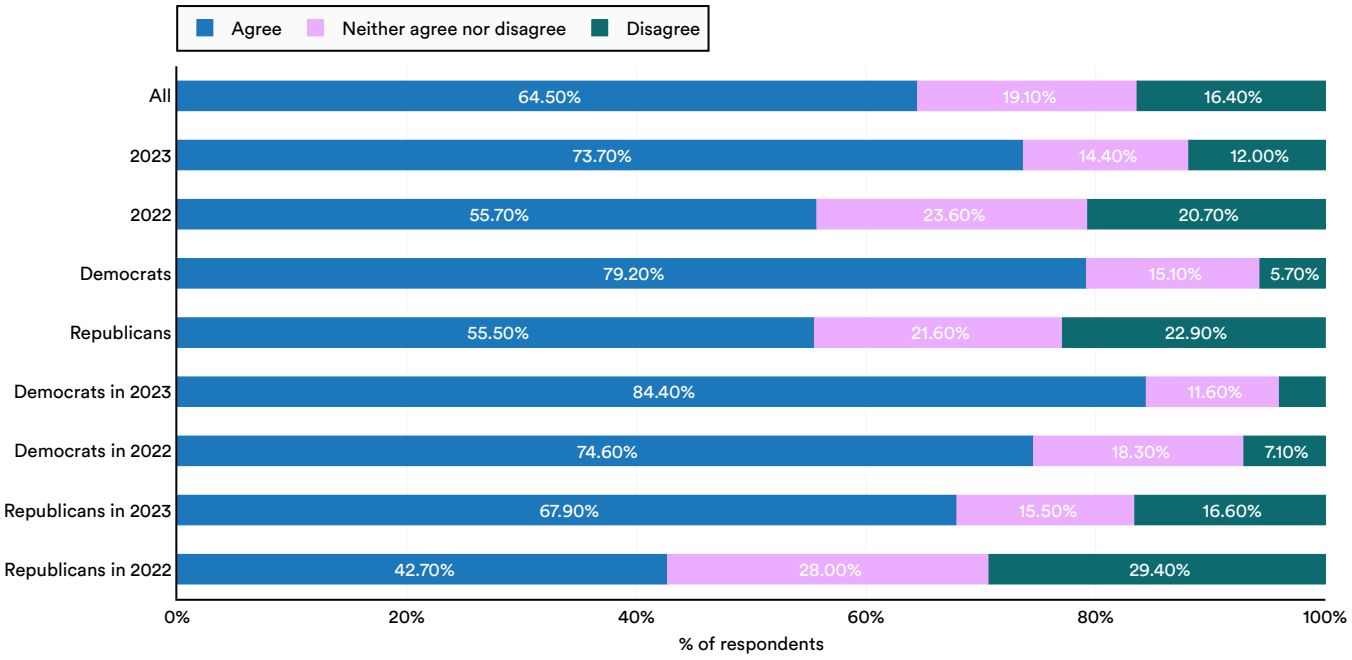

Figure 8.2.1

Given that most local policymakers support some form of AI regulation, which specific policies do they favor? At 80.4%, the strongest support is for stricter data privacy regulations. In addition, 76.2% support retraining programs for the unemployed, and 72.5% support AI deployment regulations (Figure 8.2.2). In contrast, there is significantly less backing for redistributive measures. Just 33.9% support wage subsidies to offset wage declines and just 24.6% support universal basic income.

Local US officials' views on what AI policies would be beneficial for 2025–50
Source: Hatz et al., 2025 | Chart: 2025 AI Index report

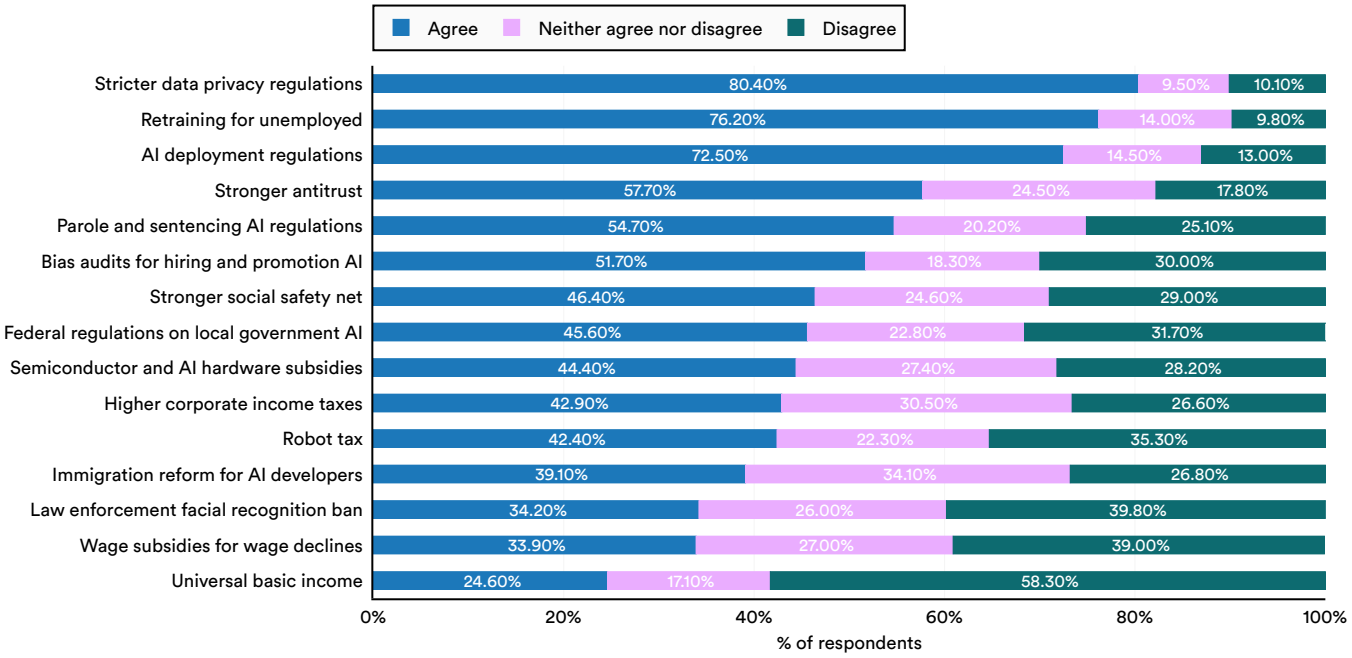

Figure 8.2.2

When it comes to AI policy, most local legislators do not believe they will have to take immediate action (Figure 8.2.3). Only 34.3% believe they will need to act within the next few years, compared to 56.5% who do not. However, agreement with this statement has increased from 32.2% in 2022 to 36.6% in 2023. This reflects the impact of major AI developments, such as the launch of ChatGPT, on policymakers' perspectives.

Local US officials' likelihood of making AI policy decisions by party and year

Source: Hatz et al., 2025 | Chart: 2025 AI Index report

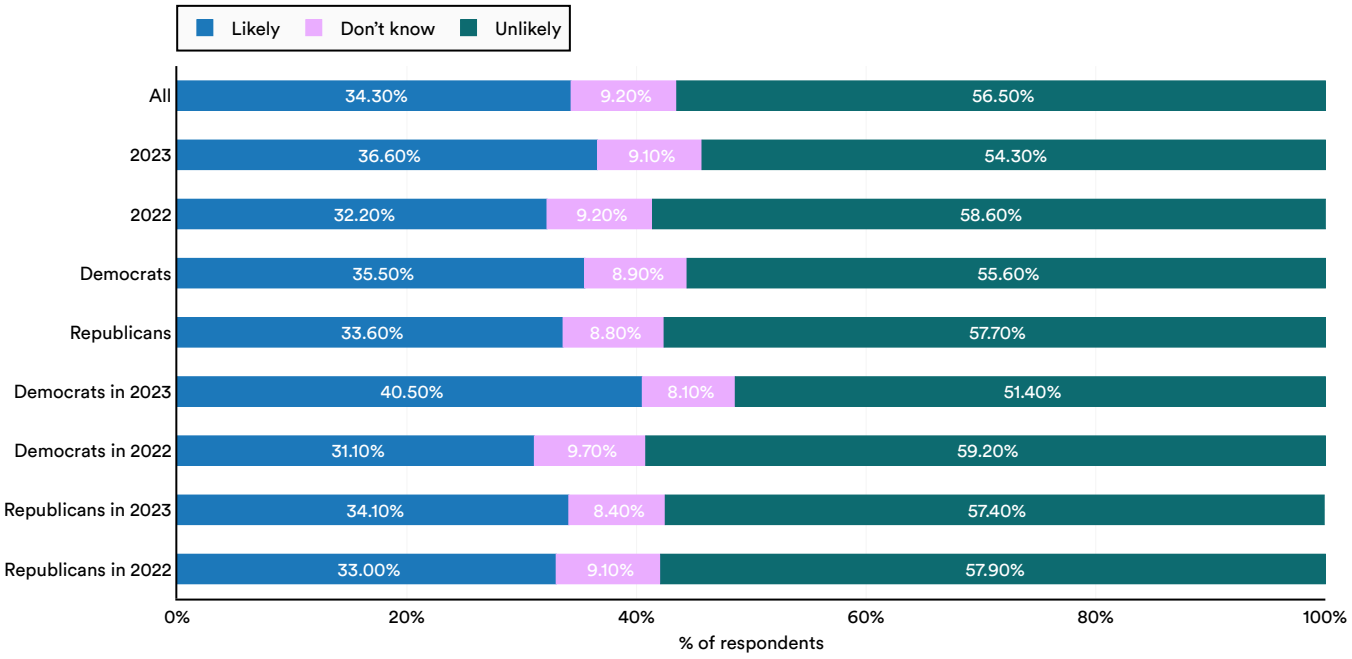

Figure 8.2.3

Only 29.8% of locally elected officials feel adequately informed to make AI policy decisions (Figure 8.2.4). While confidence in AI-related policymaking has increased slightly across both parties from 2022 to 2023, it remains relatively low overall.

Local US officials' feeling adequately informed to make decisions about AI by party and year
Source: Hatz et al., 2025 | Chart: 2025 AI Index report

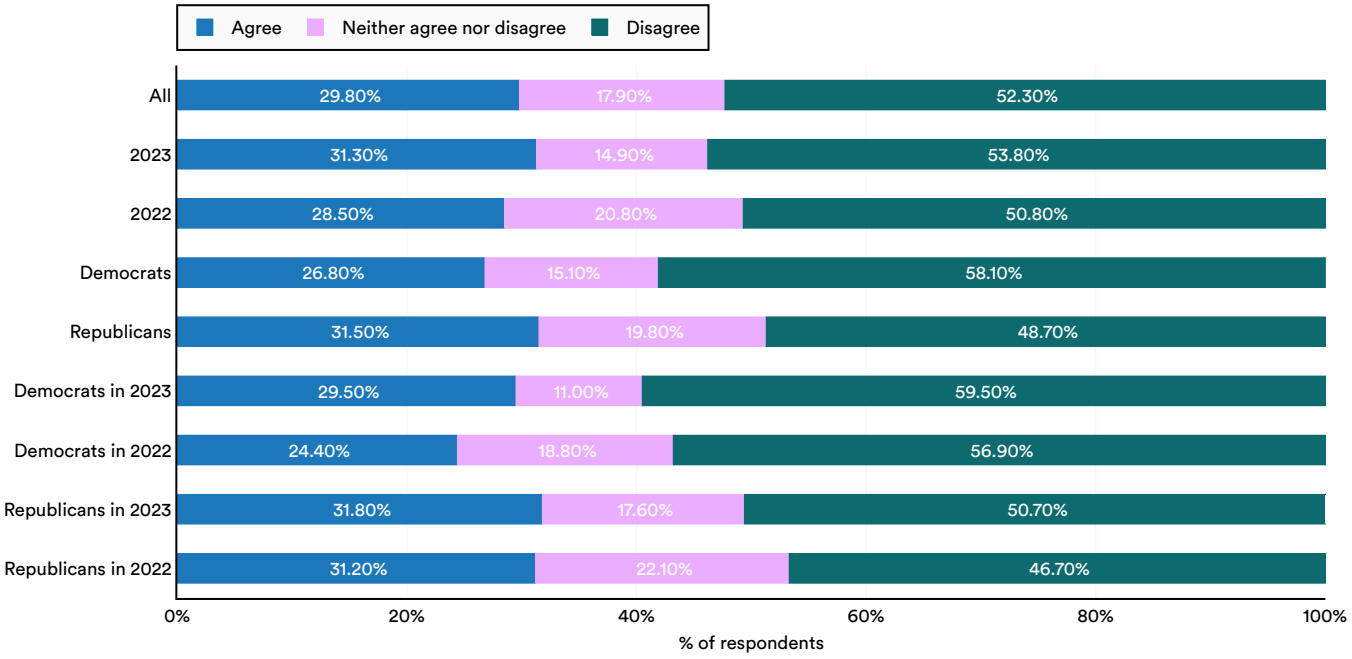

Figure 8.2.4

Appendix

Ipsos

For the sake of brevity, the 2025 AI Index opted not to republish the methodology used by the Ipsos survey featured in the report. More details about the Ipsos survey's methodology can be found in the survey itself.