GLOBAL PUBLIC CONFIDENCE STUDY 2025

Artificial Intelligence Perceptions

Report

IRIS NETWORK
GLOBAL PUBLIC CONFIDENCE
STUDY REPORT 2025

Introduction

- The 2025 IRIS Global Confidence Study provides a multi-country view of public sentiment on the most important issues of the day: economic confidence, health attitudes, climate concerns, and artificial intelligence.
- This report presents the AI results – exploring awareness, usage, knowledge, and attitudes across 20 countries and nearly 15,000 respondents. Separate reports address the other three themes.

Methodology

	2024	2025
Sample	13 083 resp.	14 742 resp.
Countries	21	20
Fieldwork	Q2 2024	Q4 2025
Method	Mixed (online, F2F, CATI)	
Sample per country	500–1,000 adults	

Participating Countries

Western Europe
Austria, Finland, Germany, Ireland, Italy, Spain, Switzerland
Central & Eastern Europe
Bulgaria, Greece, Poland, Romania, Türkiye
Asia-Pacific
Australia, Indonesia, Japan, Malaysia, South Korea
Americas
Canada, Dominican Republic, USA

Note: Country coverage changed between waves – Bulgaria, Canada, Dominican Republic, Germany, and Ireland are new to 2025, replacing France, Kenya, Mexico, Nigeria, and Panama from 2024.

Participating Countries

Australia		instinct and reason	Finland		RED NOTE	Italy		Ales Market Research	South Korea		THE RESEARCH COMPANY
Austria		market INSTITUT	Germany		moweb research	Japan		SUGATA Research	Spain		NUEVA INVESTIGACIÓN
Bulgaria		market LINKS	Greece		FocusBari	Malaysia		PINNACLE ANALYTICS	Switzerland		intervista
Canada		ENVIRONICS RESEARCH	Indonesia		illuminate	Poland		arc	Türkiye		era
Dominican republic		SSLA STRATEGY SOLUTIONS LATIN AMERICA	Ireland		amárach research	Romania		ISRA CENTER	USA		EMC research

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1. EXECUTIVE SUMMARY

Key Findings at a Glance

Awareness growth

91%

Have heard of AI
(up from 82% in 2024)

AI has gone mainstream

73%

have used AI
(up from 48% in 2024)

Usage outpaces understanding

44%

Feel Knowledgeable
(+5pp vs 2024)

Optimism rises but unevenly

+24%

Net Optimism
Advantages-Disadvantages
(Asia +41%, Europe +12%)

Most active users feel most threatened

22%

Feel threatened about job displacement
(Tech-savvy sectors up to 43%)

What It Means for Business

AI is no longer a differentiator

The question shifted from 'Should we adopt?' to 'How fast can we scale?' Companies without AI integration risk appearing outdated

AI has gone mainstream

both for employees and consumers. Products that explain themselves and build trust through transparency will outperform black-box solutions. HR faces urgent upskilling needs

Usage outpaces understanding

Younger employees expect AI tools; older employees may need support and reassurance. Customer segmentation should reflect AI comfort levels – don't assume universal digital readiness, especially in markets with aging populations

Optimism rises but unevenly

Product launches, marketing campaigns, and change management approaches should reflect regional sentiment – one global AI narrative won't resonate everywhere

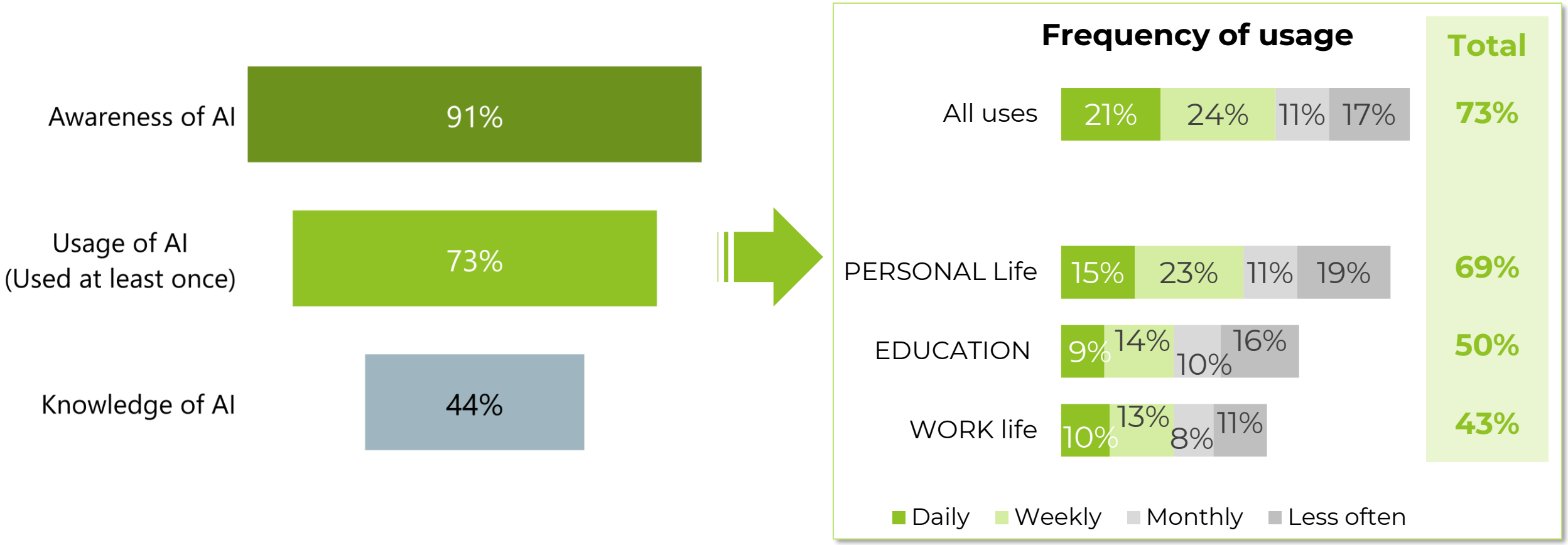
Most active users feel most threatened

Employee engagement and retention in high-AI-exposure roles require proactive communication. Emphasize AI as augmentation, not replacement. Ignoring anxiety risks losing top talent.

2. ARTIFICIAL INTELLIGENCE OUTLOOK

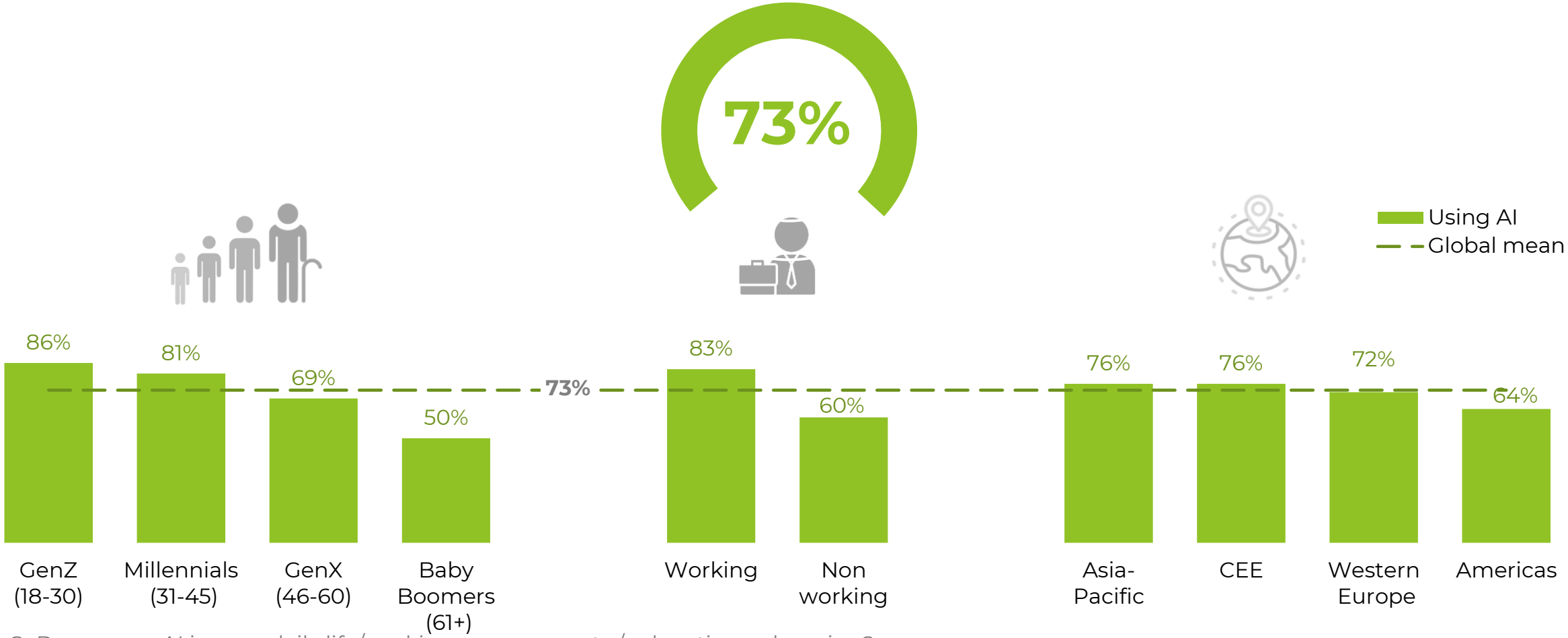
AI Readiness Funnel

The awareness-to-knowledge funnel reveals a significant drop-off: while 91% know about AI and 73% have tried it, less than half (44%) feel they truly understand it. This "confidence gap" represents both a challenge and an opportunity for education initiatives. Personal use leads in both reach (69%) and frequency, while work-related use remains less intensive.



Usage of AI

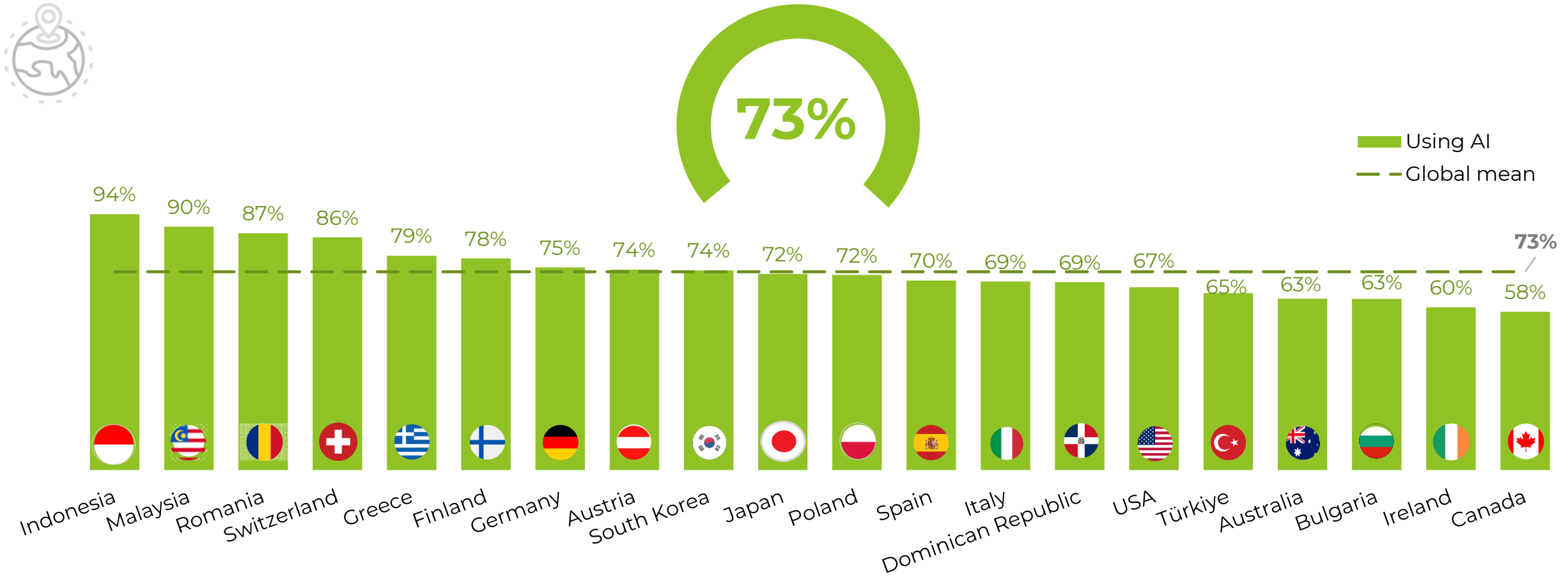
AI adoption follows predictable demographic lines – younger, employed, and urban populations lead. But the 36pp gap between GenZ (86%) and Baby Boomers (50%) suggests generational digital divides are widening, not closing. Regionally, Asia-Pacific and CEE lead adoption (76%), while the Americas trail at 64%.



Q. Do you use AI in your daily life/working engagements / education or learning?

Usage of AI

Indonesia (94%) and Malaysia (90%) lead global AI adoption, with Romania (87%) and Switzerland (86%) rounding out the top performers. English-speaking markets notably lag – Canada (58%), Ireland (60%), Australia (63%), and the USA (67%) all fall below the 73% global mean, suggesting adoption barriers beyond infrastructure.



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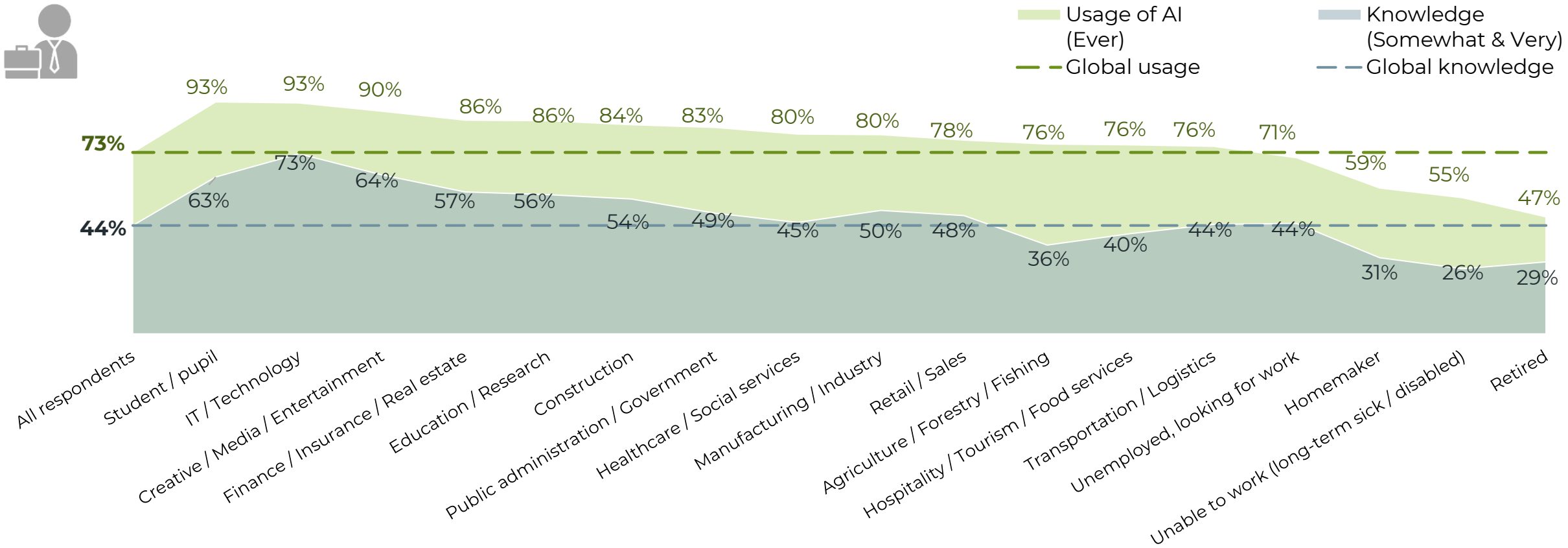
Usage vs Knowledge of AI

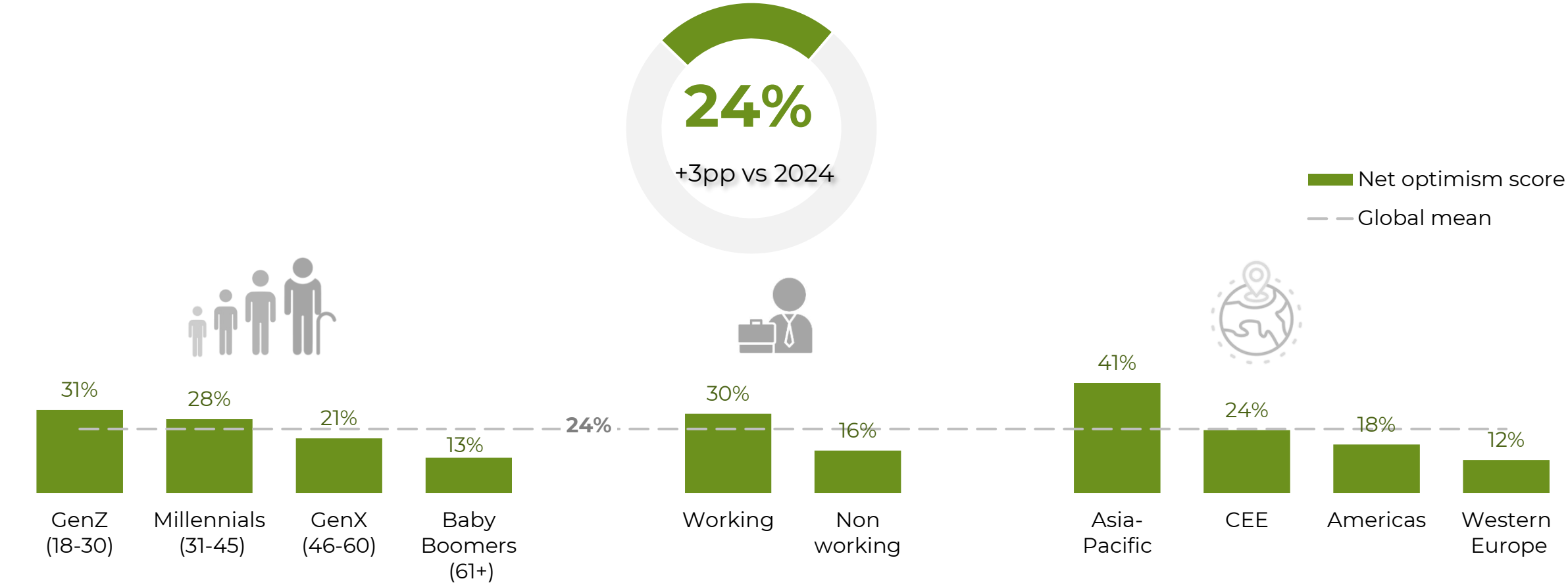
High adoption doesn't always mean deep understanding. IT professionals lead on both dimensions – highest usage (93%) and knowledge (73%). Yet significant gaps emerge in traditional sectors: Agriculture, Healthcare, and Hospitality all show 30pp+ differences between usage and knowledge, suggesting many are "doing without knowing."



Q. Have you ever used AI in your daily life/working engagements/education, or learning?
Q. How knowledgeable do you feel about AI and its applications?

AI Net Optimism Score (NOS)

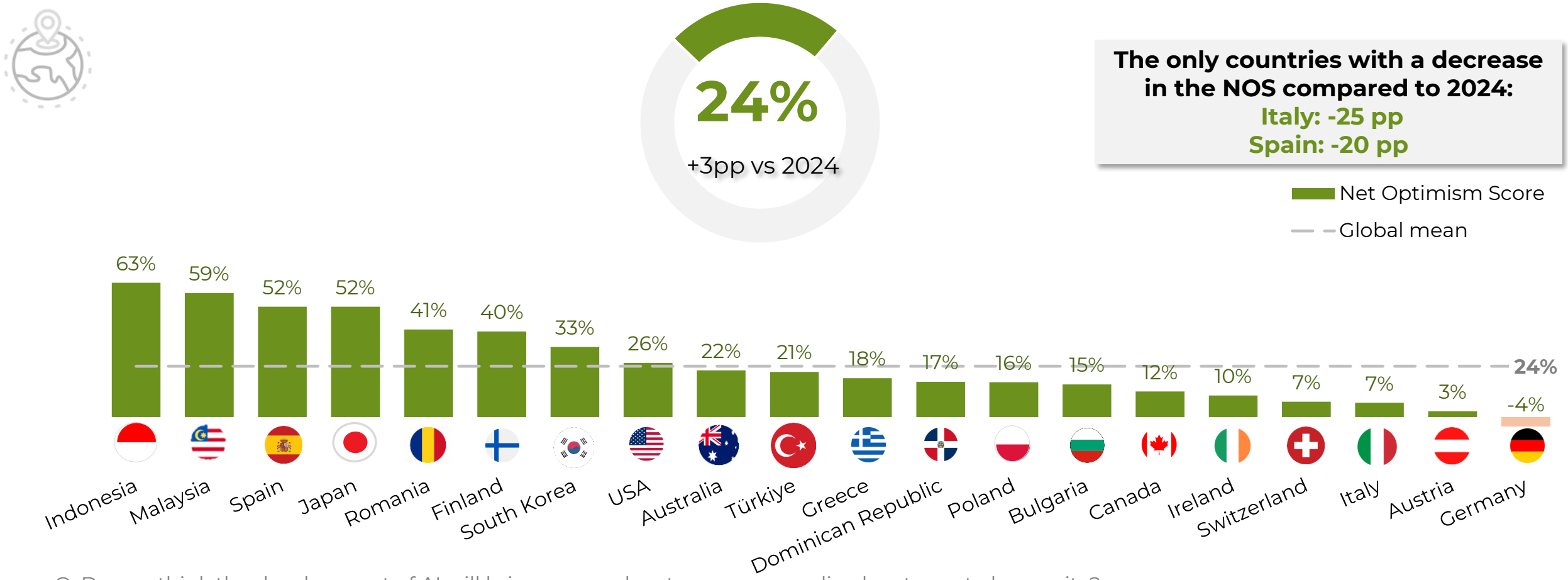
Global AI optimism (*Perceived Advantages – Perceived Disadvantages*) stands at +24%, up 3pp from 2024. Younger generations and working professionals are most optimistic. Regional differences are significant: Asia-Pacific leads at +41%, compared to +12% in Western Europe.



Q. Do you think the development of AI will bring more advantages or more disadvantages to humanity?
The score represents perceived "Advantages" – "Disadvantages."

AI Net Optimism Score (NOS)

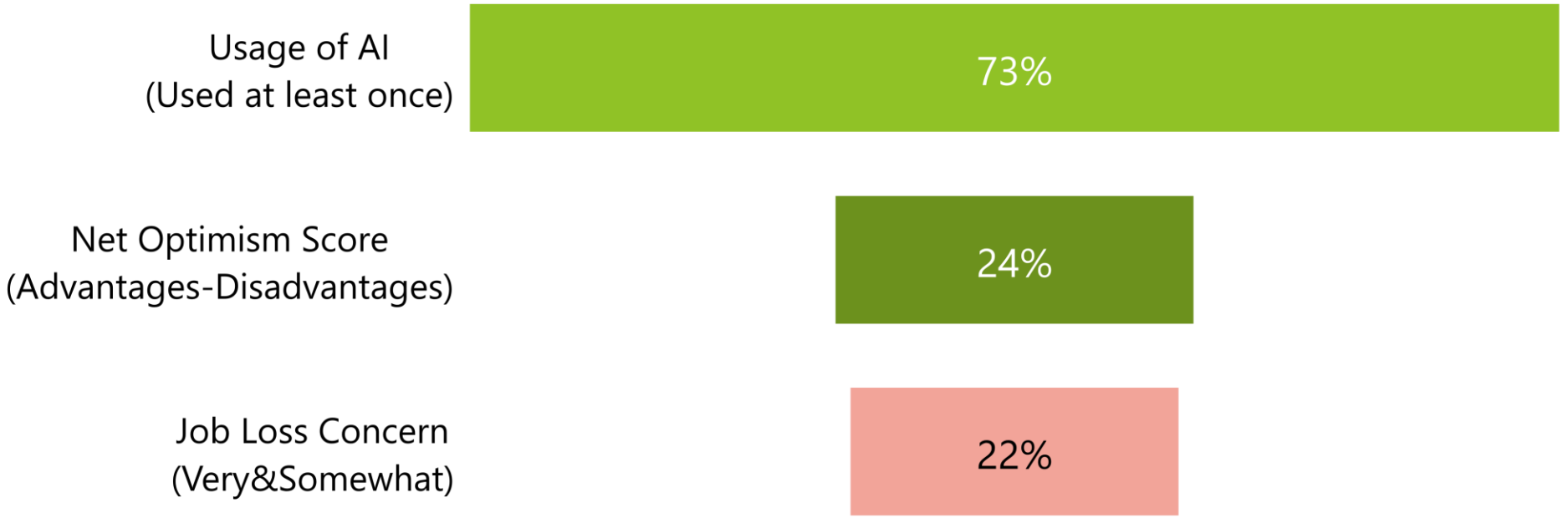
Net Optimism Scores range from 63% (Indonesia) to -4% (Germany), revealing stark regional divides. Southeast Asia remains most optimistic, while Western European markets cluster near or below the 24% global mean. Notably, two countries saw significant year-on-year declines: Italy (-25pp) and Spain (-20pp).



Q. Do you think the development of AI will bring more advantages or more disadvantages to humanity?
The score represents perceived "Advantages" – "Disadvantages."

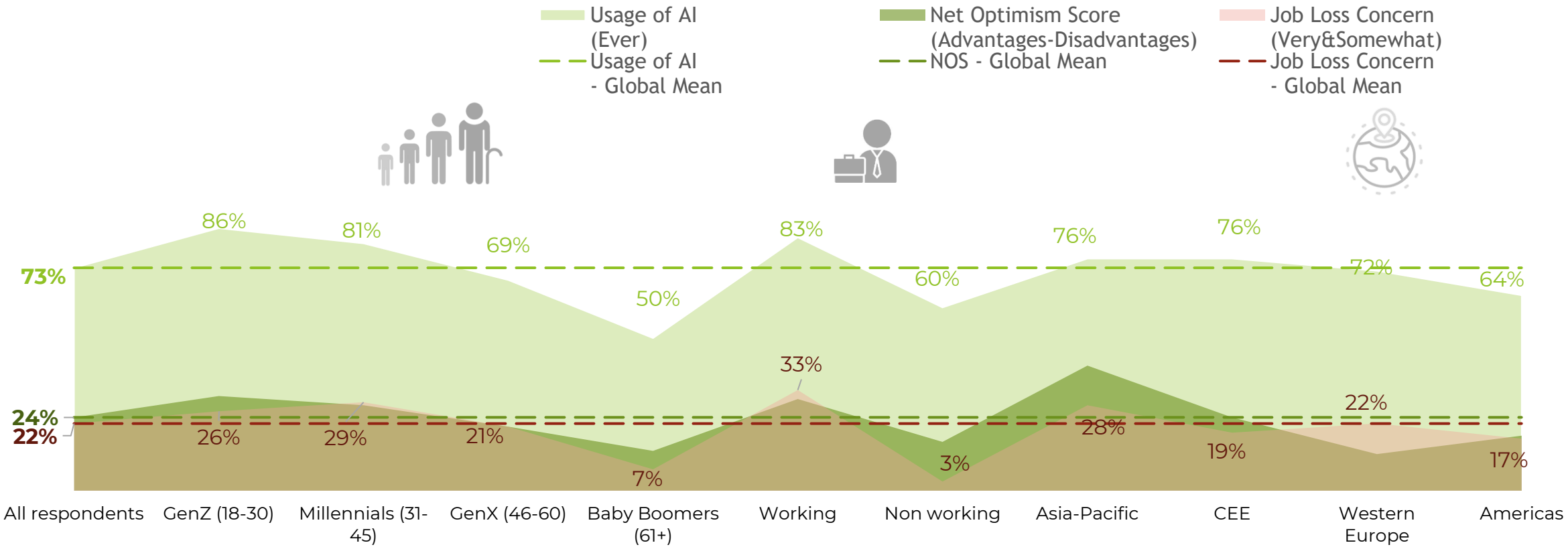
The Confidence Picture

AI sentiment is positive across the board, but societal optimism outpaces personal confidence. The Net Optimism Score stands at +24%, yet 22% still worry about their own jobs. The majority (78%) remain unconcerned – either confident or outside the workforce.



The Confidence Picture: Experience Breeds Concern

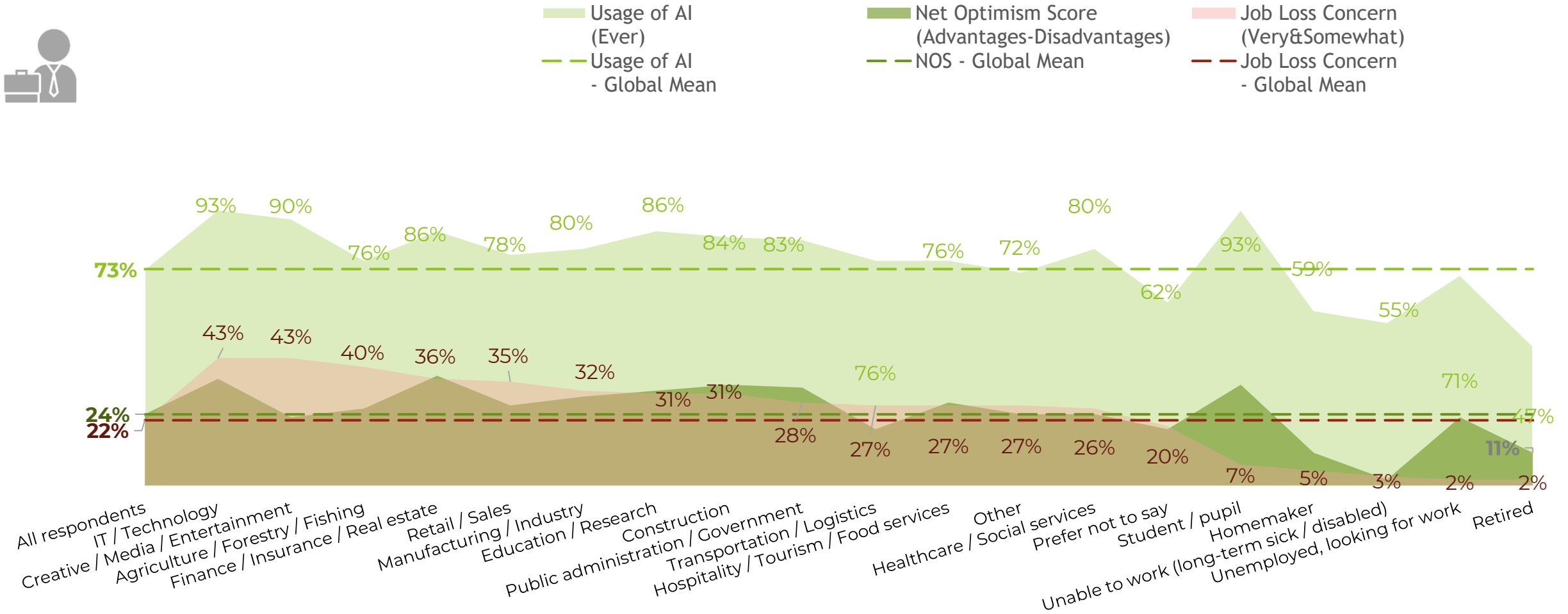
The most active AI users are also the most concerned about job displacement: working professionals (83% usage, 33% concern), Millennials (81%, 29%), and Asia-Pacific (76%, 28%). Lower usage groups – Baby Boomers (50%, 7%) and non-working (60%, 3%) – show minimal worry. Experience with AI heightens, not eases, concern.



Q. Have you ever used AI in your daily life/working engagements/education, or learning?
Q. Do you think the development of AI will bring more advantages or more disadvantages to humanity?
Q. How worried are you that your job is at risk because of the increasing use of AI?

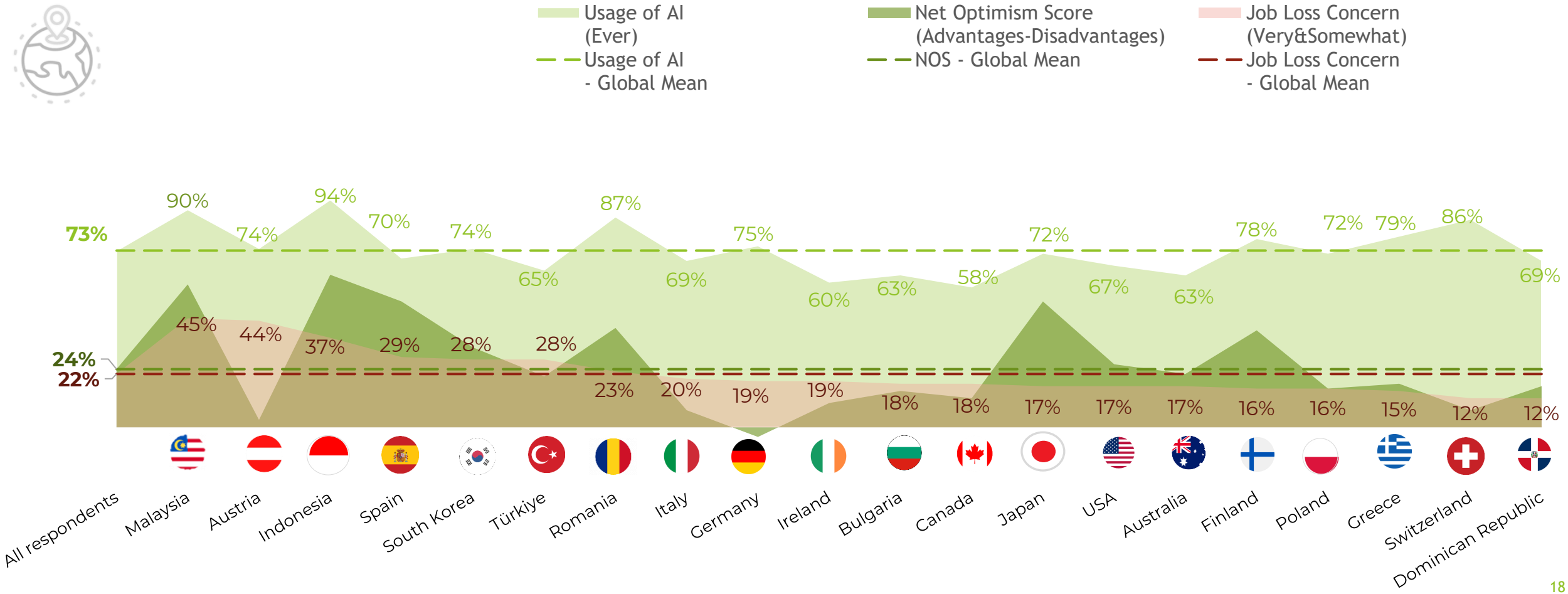
Experience Breeds Concern: Tech-Adjacent Sectors Feel It Most

Sector data reinforces the pattern: those who use AI most worry most. IT professionals (93%, 43%) and Creative/Media (90% usage, 43% concern) top both metrics. Interestingly, Agriculture (76%, 40%) shows similar concern levels despite lower usage – perhaps reflecting anxiety about automation's broader reach. Non-working groups remain largely unconcerned.



Experience Breeds Concern: Country View

The "experience breeds concern" pattern varies by country. Southeast Asia follows it closely – Malaysia (90% usage, 45% concern) and Indonesia (94%, 37%) show both high adoption and elevated worry. Yet some high-usage markets break the mold: Switzerland (86%, 12%), Finland (78%, 16%), and Japan (72%, 17%) combine strong adoption with low concern. Austria stands out with the highest concern (44%) despite moderate usage (74%).



Thank you.

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