ATTITUDES TOWARD TECHNOLOGY – US – 2023

Most consumers feel nervous about generative AI and its future implications. Market investment is soaring, with a greater focus on enterprise applications.

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Attitudes Toward Technology – US – 2023

This report looks at the following areas:

- Knowledge and experience with generative AI
- GenAI functions of interest and how consumers see themselves using the technology
- Anticipated areas of genAI applications
- Consumer attitudes toward genAI

Overview

Despite wide familiarity and early adoption for some, most consumers have real concerns about genAI, stemming largely from uncertainty about how it will impact the future. 59% are concerned about humans losing power to machines and an equal amount are anticipating the spread of misinformation. 66% want the government to regulate the use of genAI.

Gaming and education are the areas that most consumers imagine genAI being applied to. Women are generally more likely to expect genAI implementation across more areas. Men, however, are already using genAI more than women and feel indifferent to it, that it is just a fad. In addition, consumers are having a harder time imagining how they will use genAI personally compared to how the tech's functionality will be used in general. The suggests more education is needed around what the tech can do and what benefits it can provide on an individual level.

ChatGPT was the fastest growing app in history. While consumers can access genAI apps like ChatGPT or Midjourney, genAI companies are more focused on selling the tech to enterprise clients at this time. As such, there is little B2C marketing, opting more on word-of-mouth to generate interest.

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Overall, the market is exploding. 2023 investment was estimated at $16B, and set to grow at a five-year CAGR of 73%, reaching $143B in 2027.

Report Content

EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- Market predictions
- Opportunities

CONSUMER INSIGHTS

Consumer fast facts

Consumer fast facts (continued)

Familiarity with genAI

- Most have heard of genAI, a fifth are using daily
- Younger consumers leading in knowledge and adoption of genAI...
  - Graph 1: familiarity and experience with generative AI, by age, 2023
- ...but they are also more likely to downplay the significance of genAI
  - Graph 2: generative AI is a fad (% any agree), overall by those who have used genAI, 2023
- Not surprisingly, men driving genAI usage
  - Graph 3: I have used generative AI tools..., by age and gender, 2023
- Men more likely to see benefits of genAI and will pay a premium for it

Expectations for generative AI

- Consumers anticipate genAI application everywhere, but its impact will feel gradual
  - Graph 4: expectations for generative AI, 2023
- Women are seeing application across more areas
  - Graph 5: expectations for generative AI, by gender, 2023
- Men see benefits of genAI to reduce loneliness
  - Graph 6: generative AI for companionship will decrease loneliness (% any agree), by gender, 2023
- Life stage and personal needs impact where consumers expect to see genAI implementation
  - Graph 7: expectations for generative AI (select), by age, 2023
- As new genAI tools in select areas come to market, focusing on current users could prove to be a better strategy
  - Graph 8: expectations for generative AI, overall by those who have used generative AI tools and have adopted them in work and daily life, 2023

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Interest in functions of genAI

- Interest in genAI functions is currently robust

    – Graph 9: functional interests of generative AI, 2023

- Video generation is a key interest among men 18-34

    – Graph 10: functional interests of generative AI, by gender, 2023

- Interest in genAI functions is limited for consumers age 55+

    – Graph 11: functional interests of generative AI, by age, 2023

- Even sparse use of genAI tools increases interest among most functions

    – Graph 12: functional interests of generative AI, overall by those who have used generative AI tools, 2023

- Free access will remain key to draw in more consumers

Personal use

- Consumers are having a harder time imaging how they will personally use AI

- Consumers less sure how they will personally use genAI

- Consumers are having a harder time imaging how they will personally use AI

    – Graph 13: anticipated personal use of generative AI, 2023

- Early anticipations for personal use follow gender stereotypes, but are still valuable

    – Graph 14: anticipated personal use of generative AI, by gender, 2023

- Anticipation for personal use is highest among the young, but not exclusive

    – Graph 15: anticipated personal use of generative AI, by age, 2023

- GenAI could lead to greater representation for historically excluded groups

    – Graph 16: anticipated personal use of generative AI, by race and Hispanic origin, 2023

- Use of genAI is the greatest marketing tool

    – Graph 17: anticipated personal use of generative AI, overall by those who have used generative AI tools, 2023

Bright side versus dark side of genAI

- White-collar unions could become more common as genAI enters the workplace

    – Graph 18: generative AI impact on jobs, by age, 2023

- Personal job loss is a greater concern for relatively new workers

    – Graph 19: "I could see myself losing my job due to the use of generative AI in the workplace" (% any agree), by age, 2023

- Consumers still prefer human-generated content, and are not confident they could even recognize genAI content

    – Graph 20: ease of genAI content identification, by age, 2023

    – Graph 21: content creation preferences, by age, 2023

- Flag AI-generated content so consumers feel they have a choice

- When does paying homage become copyright infringement?

    – Graph 22: creating new content from dead artists' previous work through generative AI is great for fans (% any agree), by gender, 2023

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- Deepfakes are another matter

- Younger adults are the least concerned about intellectual property rights

  – Graph 23: concerns over intellectual property rights are overblown (% any agree), by age, 2023

- Balance human- and AI-generated shopping aides to appeal to the greatest number of shoppers

  – Graph 24: generative AI preferences for shopping/commerce, by age, 2023

- Stand out by using "human-powered" customer service

- GenAI tech will be another tool for learning, not a replacement

  – Graph 25: generative AI impact on mental capabilities, by parental status, 2023

- New technology has a history of generating fear before it is better understood

- Cheating concerns may also be keeping older men from greater adoption

  – Graph 26: students using generative AI in their school work are cheating (% any agree), by age and gender, 2023

Consumer attitudes

- Regulation

- Implicit bias in training data reinforces negative stereotypes

  – Graph 27: the government should regulate the use of generative AI (% any agree), by age, 2023

- Bias has far-reaching consequences

- Highlight positive to temper dystopian fears

  – Graph 28: "I am concerned that generative AI will lead to machines having more power than humans" (% any agree), by age, 2023

- Future uncertainty leaves consumers fearful of misinformation

  – Graph 29: "I think generative AI will spread misinformation" (% any agree), by age, 2023

- Dads are a ready made consumer base for genAI specific cybersecurity

  – Graph 30: generative AI will decrease online safety (% any agree), moms vs dads, 2023

COMPETITIVE STRATEGIES

Marketing and advertising

- With few exceptions, consumer marketing campaigns are slow to emerge

- Microsoft returns to advertising support for veteran products that now feature genAI functionality

- Microsoft pulled back paid media spend supporting devices/gaming in 2023, shifting to its browser/search tools and cloud computing

  – Graph 31: Microsoft 2022-23 paid media spend for top 10 brands by 2023 share

- Meanwhile, OpenAI lets ChatGPT speak for itself

- A fair amount of paid media spend was geared toward enterprise clients or, in the case of DeepMind, talent acquisition, and nearly all on social

- Consumer targeted ad showcase genAI tech in action or the results the tech provides

Opportunities

- Most brands will not be able to get away anywhere without advertising

THE MARKET

Market context

- Economic turmoil is not hindering genAI growth

Market factors

- GenAI could help un- and under-employed workers land better positions
    - Graph 32: unemployment and underemployment, 2022-23
- GenAI could be the economical alternative for content creators
    - Graph 33: Consumer Price Index change from previous period, 2022-2023

Market size and forecast

- Current focus is on enterprise investment

Key players

- OpenAI: the undisputed leader in genAI
- Anthropic gains steam with Amazon
- Google DeepMind plays catch up
- Meta turns cultural icons into AI assistants
- Stability AI – committed to open source AI for the advancement of humanity

APPENDIX

- Consumer research methodology
- Generations
- Abbreviations and terms

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