Location snapshot │ Australia

Population: 26.9 million   GDP per capita: US$65,100

Use of gen AI

Gen AI use is widespread in Australia …

66% of students have used gen AI

51% of employees have used gen AI

Australia ranks **8th out of 9** locations for gen AI use … and increasing

The percentage of gen AI users who use the tool daily is set to increase by 255% in the next five years

Today	**8%**
In the next year	**10%**
In the next five years	**20%**

Attitudes toward gen AI

33% of students and employees believe gen AI will mean the Asia Pacific has a greater role in the global economy

47% of students and employees think that gen AI will enhance social outcomes (e.g., access to training, education, and healthcare)

29% of students said that gen AI significantly influenced their career decisions

On average, employees believe 51% of their tasks will be automated or augmented within the next five years

Automated	Augmented	Not affected
24%	**27%**	**49%**

Benefits, barriers, and enablers

Top three benefits of gen AI

1 Increased speed at completing tasks, 75%

2 Increased ability to generate new ideas, 69%

3 Improved quality of outputs or work tasks, 64%

Top three barriers to business adoption

Insufficient understanding	**24%**
Concerns about risk	**23%**
Lack of strategy	**17%**

Every week, gen AI saves daily users an average of …

3.4 hours at work

6.0 hours at university

31% of students and employees have acted to prepare for the proliferation of gen AI

Business and university preparedness

Most common actions for businesses

1 Speak with employees, selected by 29% of employees

2 Discuss limitations of the technology, 23%

3 Encourage on-the-job learning, 18%

Most common actions for universities

1 Speak with students, selected by 46% of students

2 Discuss the limitations of the technology, 40%

3 Ban or restrict the use of gen AI, 37%

Only 20% of employees believe their business is taking full advantage of gen AI

You	**26%**
Your business	**20%**
Your industry	**23%**

Employees describe their business as …

Today **Late majority**

In five years **Early majority**

Location snapshot | China

Use of gen AI

Gen AI use is widespread in China …

74% of students have used gen AI

71% of employees have used gen AI

China ranks **5th out of 9** locations for gen AI use … and increasing

The percentage of gen AI users who use the tool daily is set to increase by 341% in the next five years

Today	**13%**
In the next year	**30%**
In the next five years	**45%**

Attitudes toward gen AI

78% of students and employees believe gen AI will mean the Asia Pacific has a greater role in the global economy

81% of students and employees think that gen AI will enhance social outcomes (e.g., access to training, education, and healthcare)

76% of students said that gen AI significantly influenced their career decisions

On average, employees believe 67% of their tasks will be automated or augmented within the next five years

Automated	Augmented	Not affected
35%	**32%**	**31%**

Benefits, barriers, and enablers

Top three benefits of gen AI

1 Increased speed at completing tasks, 77%

2 Improved quality of outputs or work tasks, 70%

3 Increased ability to generate new ideas, 66%

Top three barriers to business adoption

Concerns about risk	**23%**
Lack of technical skills	**20%**
Insufficient understanding	**15%**

Every week, gen AI saves daily users an average of …

6.5 hours at work

12.1 hours at university

71% of students and employees have acted to prepare for the proliferation of gen AI

Business and university preparedness

Most common actions for businesses

1 Encourage on-the-job learning, selected by 61% of employees

2 Assess current data collection tools, 57%

3 Provide training on how to use gen AI at work, 55%

Most common actions for universities

1 Provide guidelines on how to use gen AI, selected by 62% of students

2 Speak to students about gen AI, 61%

3 Encourage learning around gen AI, 61%

77% of employees believe their business is taking full advantage of gen AI

You	**87%**
Your business	**77%**
Your industry	**71%**

Employees describe their business as …

Today	In five years
Early adopter	**Early adopter**

Location snapshot | India

Population: 1,441.7 million   GDP per capita: US$2,411

Use of gen AI

Gen AI use is widespread in India ...

93% of students have used gen AI

83% of employees have used gen AI

India ranks **1st out of 9** locations for gen AI use … and increasing

The percentage of gen AI users who use the tool daily is set to increase by 182% in the next five years

Today	**32%**
In the next year	**39%**
In the next five years	**57%**

Attitudes toward gen AI

75% of students and employees believe gen AI will mean the Asia Pacific has a greater role in the global economy

83% of students and employees think that gen AI will enhance social outcomes (e.g., access to training, education, and healthcare)

84% of students said that gen AI significantly influenced their career decisions

On average, employees believe 69% of their tasks will be automated or augmented within the next five years

Automated	Augmented	Not affected
37%	**32%**	**31%**

Benefits, barriers, and enablers

Top three benefits of gen AI

1 Increased speed at completing tasks, 83%

2 Improved quality of outputs or work tasks, 85%

3 Increased ability to generate new ideas, 83%

Every week, gen AI saves daily users an average of …

8.7 hours at work

7.0 hours at university

Top three barriers to business adoption

Implementation challenges	**19%**
Concerns about risk	**17%**
Insufficient understanding	**16%**

77% of students and employees have acted to prepare for the proliferation of gen AI

Business and university preparedness

Most common actions for businesses

1 Speak with employees, selected by 64% of employees

2 Provide guidelines on how to use gen AI at work, 62%

3 Encourage on-the-job learning, 60%

72% of employees believe their business is taking full advantage of gen AI

You	**79%**
Your business	**72%**
Your industry	**75%**

Most common actions for universities

1 Speak with students, selected by 70% of students

2 Encourage learning around gen AI, 67%

3 Introduce security and privacy measures, 62%

Employees describe their business as …

Today **Early majority**

In five years **Innovator**

Location snapshot | Japan

Use of gen AI

Gen AI use is widespread in Japan …

55% of students have used gen AI

34% of employees have used gen AI

Japan ranks **9th out of 9** locations for gen AI use … and increasing

The percentage of gen AI users who use the tool daily is set to increase by 519% in the next five years

Today	**4%**
In the next year	**10%**
In the next five years	**20%**

Attitudes toward gen AI

40% of students and employees believe gen AI will mean the Asia Pacific has a greater role in the global economy

61% of students and employees think that gen AI will enhance social outcomes (e.g., access to training, education, and healthcare)

46% of students said that gen AI significantly influenced their career decisions

On average, employees believe 62% of their tasks will be automated or augmented within the next five years

Automated	Augmented	Not affected
30%	**32%**	**31%**

Benefits, barriers, and enablers

Top three benefits of gen AI

1 Increased speed at completing tasks, 73%

2 Improved quality of outputs or work tasks, 54%

3 Increased ability to generate new ideas, 54%

Top three barriers to business adoption

Insufficient talent **29%**

Insufficient understanding **24%**

Concerns about risk **21%**

Every week, gen AI saves daily users an average of …

5.6 hours at work

7.3 hours at university

26% of students and employees have acted to prepare for the proliferation of gen AI

Business and university preparedness

Most common actions for businesses

1 Speak with employees, selected by 24% of employees

2 Encourage on-the-job learning, 18%

3 Provide guidelines on how to use gen AI at work, 17%

Most common actions for universities

1 Speak with students, selected by 34% of students

2 Encourage learning around gen AI, 30%

3 Introduce security and privacy measures, 29%

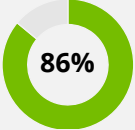**Only 18% of employees believe their business is taking full advantage of gen AI**

You	**22%**
Your business	**18%**
Your industry	**23%**

Employees describe their business as …

Today
Late majority

In five years
Early majority

Location snapshot │ Singapore

Population: 5.7 million   GDP per capita: US$82,808
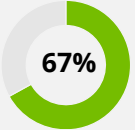
Use of gen AI

Gen AI use is widespread in Singapore ...

86% of students have used gen AI

67% of employees have used gen AI

Singapore ranks **4th out of 9** locations for gen AI use

The percentage of gen AI users who use the tool daily is set to increase by 203% in the next five years

Today	**14%**
In the next year	**18%**
In the next five years	**29%**

Attitudes toward gen AI

60% of students and employees believe gen AI will mean the Asia Pacific has a greater role in the global economy

64% of students and employees think that gen AI will enhance social outcomes (e.g., access to training, education, and healthcare)

57% of students said that gen AI significantly influenced their career decisions

On average, employees believe 64% of their tasks will be automated or augmented within the next five years

Automated	Augmented	Not affected
33%	**31%**	**36%**

Benefits, barriers, and enablers

Top three benefits of gen AI

1 Increased speed at completing tasks, 75%

2 Increased ability to generate new ideas, 72%

3 Improved quality of outputs or work tasks, 69%

Every week, gen AI saves daily users an average of ...

4.4 hours at work

4.5 hours at university

Top three barriers to business adoption

Lack of talent	**20%**
Concerns about risk	**20%**
Insufficient understanding	**19%**

50% of students and employees have acted to prepare for the proliferation of gen AI

Business and university preparedness

Most common actions for businesses

1 Speak with employees, selected by 43% of employees

2 Encourage on-the-job learning, 42%

3 Provide guidelines on how to use gen AI at work, 40%

Most common actions for universities

1 Encourage learning around gen AI, selected by 60% of students

2 Provide guidelines on how to use gen AI, 56%

3 Speak with students, 55%

Only 47% of employees believe their business is taking full advantage of gen AI

You	**52%**
Your business	**47%**
Your industry	**51%**
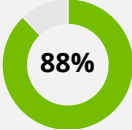
Employees describe their business as ...

Today
Early majority

In five years
Early majority

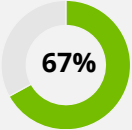# Location snapshot | Taiwan (China)

Population: 23.25 million   GDP per capita: US$34,005

Use of gen AI

Gen AI use is widespread in Taiwan (China) ...

88% of students have used gen AI

67% of employees have used gen AI

Taiwan (China) ranks **3rd out of 9** locations for gen AI use

The percentage of gen AI users who use the tool daily is set to increase by 278% in the next five years

Today **9%**

In the next year **12%**

In the next five years **24%**

Attitudes toward gen AI

59% of students and employees believe gen AI will mean the Asia Pacific has a greater role in the global economy

61% of students and employees think that gen AI will enhance social outcomes (e.g., access to training, education, and healthcare)

60% of students said that gen AI significantly influenced their career decisions

On average, employees believe 70% of their tasks will be automated or augmented within the next five years

Automated	Augmented	Not affected
37%	33%	39%

Benefits, barriers and enablers

Top three benefits of gen AI

1 Increased speed at completing tasks, 82%

2 Improved quality of outputs or work tasks, 72%

3 The ability to learn new skills, 65%

Every week, gen AI saves daily users an average of ...

6.0 hours at work

4.0 hours at university

Top three barriers to business adoption

Insufficient understanding **26%**

Insufficient talent **25%**

Concerns about risk **21%**

46% of students and employees have acted to prepare for the proliferation of gen AI

Business and university preparedness

Most common actions for businesses

1 Encourage on-the-job learning, selected by 48% of employees

2 Speak with employees, 41%

3 Assess current data collection tools, 38%

Most common actions for universities

1 Speak with students, selected by 65% of students

2 Encourage learning around gen AI, 60%

3 Discuss the limitations of gen AI, 29%

Only 30% of employees believe their business is taking full advantage of gen AI

You **40%**
Your business **30%**
Your industry **30%**

Employees describe their business as ...

Today **Early majority**

In five years **Early majority**

Location snapshot | South Korea

Population: 51.5 million   GDP per capita: US$32,422

Use of gen AI

Gen AI use is widespread in South Korea …

87% of students have used gen AI

62% of employees have used gen AI

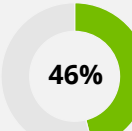**The percentage of gen AI users who use the tool daily is set to increase by 309% in the next five years**

Today — **11%**

In the next year — **16%**

In the next five years — **34%**

South Korea ranks **6th out of 9** locations for gen AI use

Attitudes toward gen AI

52% of students and employees believe gen AI will mean the Asia Pacific has a greater role in the global economy

64% of students and employees think that gen AI will enhance social outcomes (e.g., access to training, education, and healthcare)

50% of students said that gen AI significantly influenced their career decisions

On average, employees believe 60% of their tasks will be automated or augmented within the next five years

Automated	Augmented	Not affected
33%	**27%**	**40%**

Benefits, barriers, and enablers

Top three benefits of gen AI

1 Increased speed at completing tasks, 77%

2 Improved quality of outputs or work tasks, 69%

3 Increased ability to generate new ideas, 66%

Top three barriers to business adoption

Insufficient understanding — **25%**

Insufficient talent — **22%**

Concerns about risk — **21%**

Every week, gen AI saves daily users an average of …

4.5 hours at work

5.5 hours at university

39% of students and employees have acted to prepare for the proliferation of gen AI

Business and university preparedness

Most common actions for businesses

1 Speak with employees, selected by 38% of employees

2 Identify use cases for gen AI, 27%

3 Encourage on-the-job learning, 25%

Most common actions for universities

1 Speak with students, selected by 50% of students

2 Identify use cases for gen AI, 49%

3 Encourage learning around gen AI, 47%

Only 30% of employees believe their business is taking full advantage of gen AI

You	**40%**
Your business	**30%**
Your industry	**30%**

Employees describe their business as …

Today **Late majority**

In five years **Early majority**

Location snapshot | New Zealand

Population: 5.24 million   GDP per capita: US$48,418

Use of gen AI

Gen AI use is widespread in New Zealand ...

72% of students have used gen AI

52% of employees have used gen AI

New Zealand ranks **7th out of 9** locations for gen AI use

The percentage of gen AI users who use the tool daily is set to increase by 243% in the next five years

Today	**10%**
In the next year	**10%**
In the next five years	**20%**

Attitudes toward gen AI

33% of students and employees believe gen AI will mean the Asia Pacific has a greater role in the global economy

49% of students and employees think that gen AI will enhance social outcomes (e.g., access to training, education, and healthcare)

37% of students said that gen AI significantly influenced their career decisions

On average, employees believe 52% of their tasks will be automated or augmented within the next five years

Automated	Augmented	Not affected
25%	**27%**	**48%**

Benefits, barriers, and enablers

Top three benefits of gen AI

1 Increased speed at completing tasks, 79%

2 Increased ability to generate new ideas, 70%

3 Improved quality of outputs or work tasks, 66%

Every week, gen AI saves daily users an average of ...

5.4 hours at work

3.9 hours at university

Top three barriers to business adoption

Insufficient understanding	**24%**
Concerns about risk	**23%**
Lack of strategy	**17%**

32% of students and employees have acted to prepare for the proliferation of gen AI

Business and university preparedness

Most common actions for businesses

1 Speak with employees, selected by 30% of employees

2 Discuss limitations of the technology, 23%

3 Encourage on-the-job learning, 23%

Most common actions for universities

1 Speak with students, selected by 52% of students

2 Ban or restrict the use of gen AI, 46%

3 Discuss the limitations of the technology, 41%

Only 21% of employees believe their business is taking full advantage of gen AI

You	**26%**
Your business	**21%**
Your industry	**22%**

Employees describe their business as ...

Today **Late majority**

In five years **Early majority**

Location snapshot | Southeast Asia

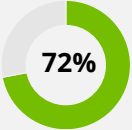Population: 596.1 million   GDP per capita: US$5,092

Use of gen AI

Gen AI use is widespread in Southeast Asia ...

90% of students have used gen AI

72% of employees have used gen AI

Southeast Asia ranks **2nd out of 9** locations for gen AI use

The percentage of gen AI users who use the tool daily is set to increase by 232% in the next five years

Today	**19%**
In the next year	**28%**
In the next five years	**43%**

Attitudes toward gen AI

69% of students and employees believe gen AI will mean the Asia Pacific has a greater role in the global economy

77% of students and employees think that gen AI will enhance social outcomes (e.g., access to training, education, and healthcare)

73% of students said that gen AI significantly influenced their career decisions

On average, employees believe 65% of their tasks will be automated or augmented within the next five years

Automated	Augmented	Not affected
34%	**31%**	**35%**

Benefits, barriers, and enablers

Top three benefits of gen AI

1 Increased speed at completing tasks, 88%

2 Improved quality of outputs or work tasks, 84%

3 Increased ability to generate new ideas, 82%

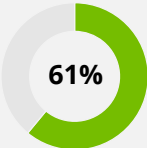**Top three barriers to business adoption**

Insufficient understanding	**25%**
Lack of talent	**23%**
Concerns about risk	**20%**

Every week, gen AI saves daily users an average of ...

6.0 hours at work

5.3 hours at university

61% of students and employees have acted to prepare for the proliferation of gen AI

Business and university preparedness

Most common actions for businesses

1 Speak with employees, selected by 57% of employees

2 Encourage on-the-job learning, 55%

3 Discuss limitations of the technology, 23%

Most common actions for universities

1 Speak with students, selected by 70% of students

2 Provide guidelines on how to use gen AI, 65%

3 Encourage learning around gen AI, 62%

60% of employees believe their business is taking full advantage of gen AI

You	**72%**
Your business	**60%**
Your industry	**65%**

Employees describe their business as ...

Today	In five years
Early majority	**Early majority**