

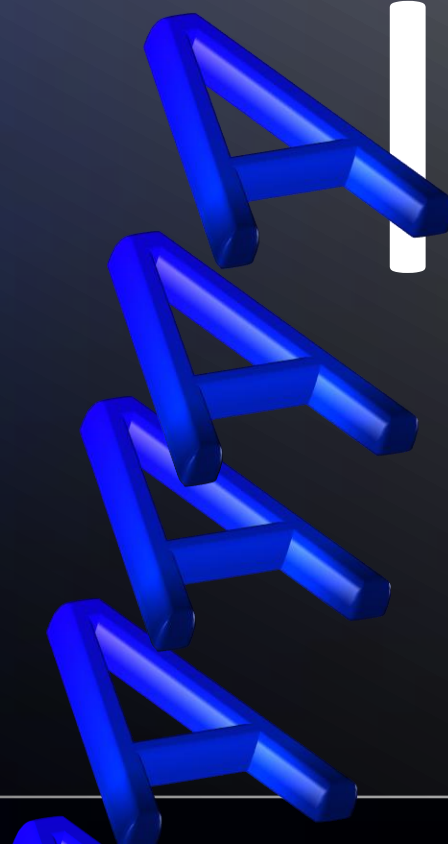
/ PROSUMER 2024

GEN. AI

What Kind of World Will We Live In?

APRIL 2024

HAVAS

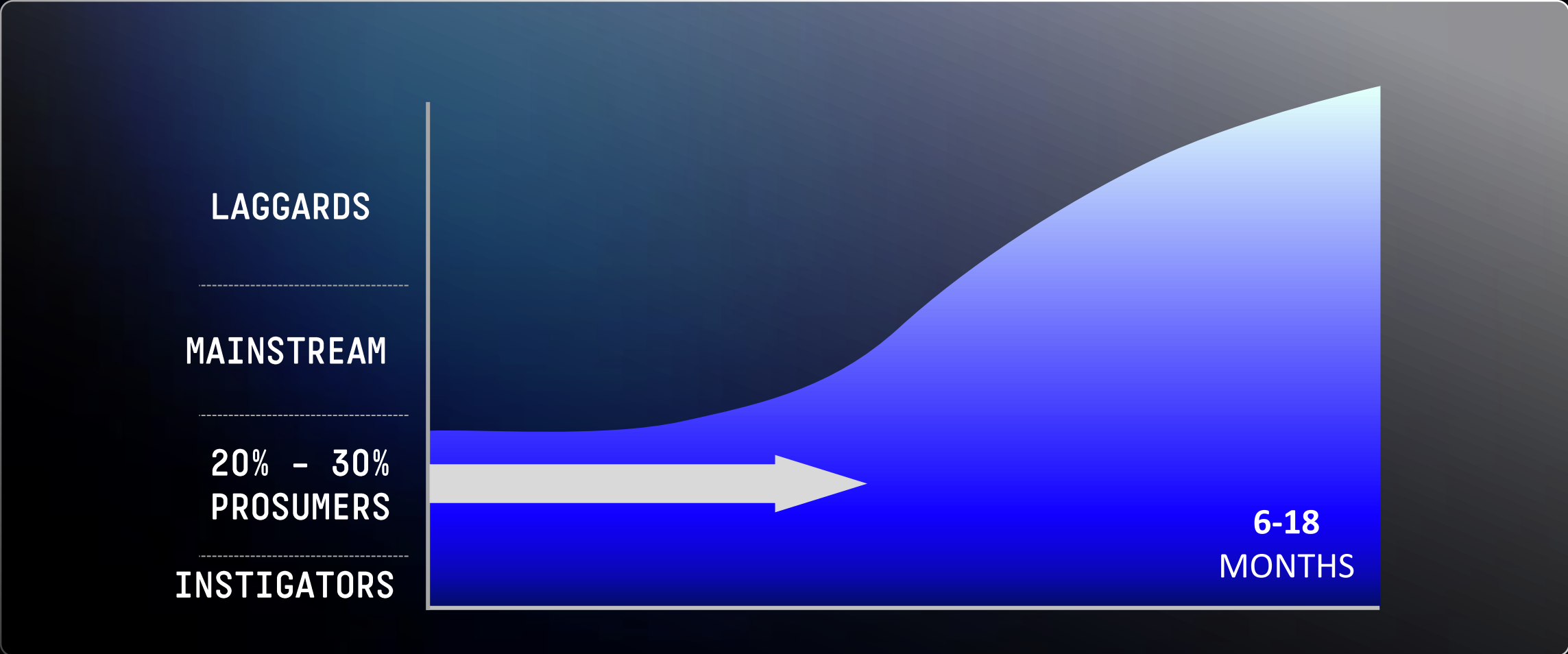


32 MARKETS

African Region • Australia • Austria • Belgium • Brazil • China • Canada • Chile • Finland • France • Germany • Greece • India • Ireland • Italy • Ivory Coast • Japan • Korea • Kenya • Malaysia • Mexico • Nigeria • Philippines • Saudi Arabia • Singapore • Spain • Thailand • United States • United Kingdom • United Arab Emirates • Ukraine • **Vietnam**

14 000 PEOPLE

WHO ARE PROSUMERS?



GEN AI IS A MASSIVE REVOLUTION

97%

PROSUMERS

90%

MAINSTREAM

Generative AI is: A Revolutionary Technology



3%

PROSUMERS

10%

MAINSTREAM

Generative AI is: Just a passing fad



IDEAS • TECHNOLOGY

How the AI Revolution Will Reshape the World

6 MINUTE READ

EVERYBODY HEARD ABOUT IT



94%

PROSUMERS

84%

MAINSTREAM

Have you heard of Generative AI tools like:
Chat GPT, MidJourney, Dall-E Etc...



91/84



94/83



94/88



95/81



95/87



98/90



99/96



100/97

EVERYBODY *PRETENDS* USING IT

85%

PROSUMERS

65%

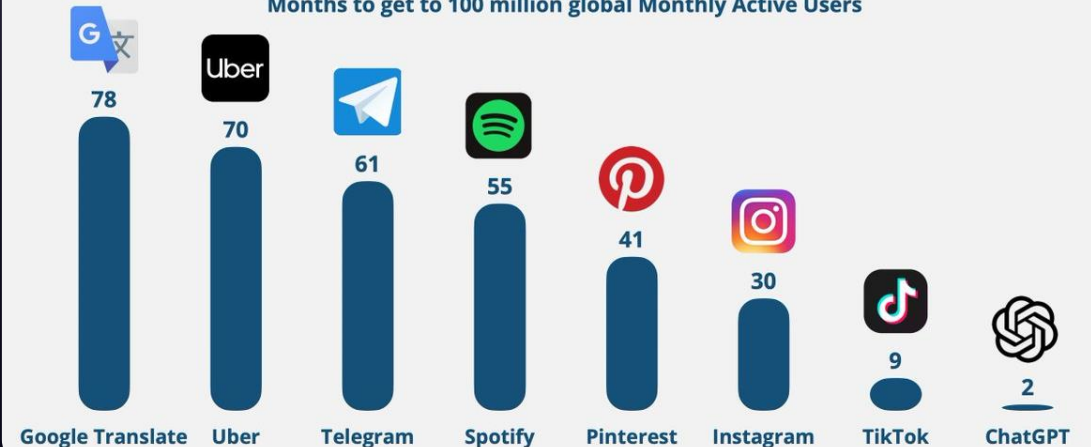
MAINSTREAM

Have you used Generative AI tools like: Chat GPT, MidJourney, Dall-E Etc...



Time to Reach 100M Users

Months to get to 100 million global Monthly Active Users



1.8

billion visits per month
on chat.openai.com.

60

million visits per day

EVERYBODY WANTS TO JUMP ON THE BANDWAGON

90%

of all content online will be created by AI by 2025.

NINA SCHICK, AUTHOR -
DEEP FAKES AND THE INFOCALYPSE

72%
PROSUMERS

60%
MAINSTREAM

The ones who will keep their jobs in the future
will be the ones who master AI

63%
GEN Z

61%
BOOMERS



HERE COMES
THE NEW
MESS.AI.H

A SUPERIOR BEING

92%

PROSUMERS

70%

MAINSTREAM

I'm amazed by the possibilities of generative AI



84/57



84/59



85/55



89/78



93/83



96/82



98/91



97/95

72%

PROSUMERS

59%

MAINSTREAM

I believe this new wave of AI tools is going to shape the future of our society.



71/58



78/59



61/54



72/55



79/59



82/71



93/72



73/59

ABLE TO SOLVE ALL THE PROBLEMS HUMANS CAN'T SOLVE

I'm hopeful AI can help solve the biggest issues of our times by:

FIGHTING CLIMATE CHANGE

64%

PROSUMERS

53%

MAINSTREAM



ELIMINATING UNEMPLOYMENT

52%

PROSUMERS

42%

MAINSTREAM



REDUCING POLITICAL CONFLICTS

49%

PROSUMERS

39%

MAINSTREAM



TRANSFORMING US AND OUR SOCIETY

PERSONALLY

89%
PROSUMERS

74%
MAINSTREAM

I think that generative AI will:
Help me perform better



COLLECTIVELY

80%
PROSUMERS

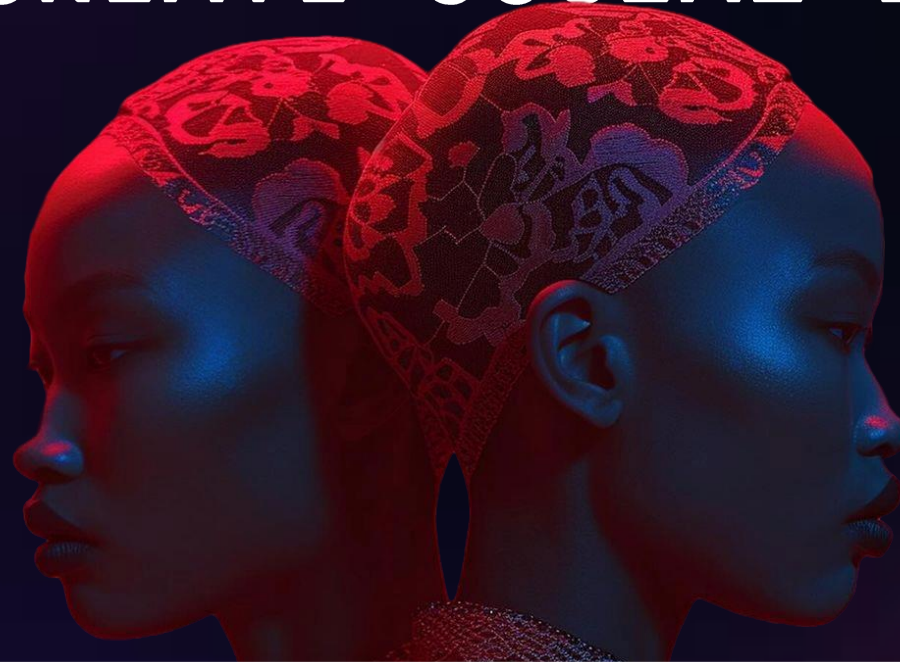
68%
MAINSTREAM

I'm hopeful AI can help reinforce people
safety



LIKE EVERY NEW CULT, AI MAY CREATE SOCIAL DIVISION

BELIEVERS



DOUBTERS

69%

PROSUMERS

68%

MAINSTREAM

AI is going to amplify the existing digital divide, between people who will know how to use it, and others who won't:



60/61



64/68



67/70



68/64



68/67



71/54



74/72



82/70

BELIEVERS



DOUBTERS

I'm frightened by the possibilities of generative AI

ADOPTION

11%
PROSUMERS

29%
MAINSTREAM

GENDER

21%
MALE

30%
FEMALE

GENERATIONAL

21%
GEN Z

42%
BOOMERS

BELIEVERS



DOUBTERS

Some topics ABOUT AI create polarization.

ITS EFFECTIVENESS

BELIEVERS

28%

PROSUMERS

DOUBTERS

43%

MAINSTREAM

I hear a lot about AI in the news, but I'm not really convinced about its efficiency yet.

ITS ETHICAL BOUNDARIES

BELIEVERS

59%

PROSUMERS

DOUBTERS

46%

MAINSTREAM

I don't care if an AI creates a piece of art (music, film, painting, writing) as long as I find it beautiful and moving.

BELIEVERS

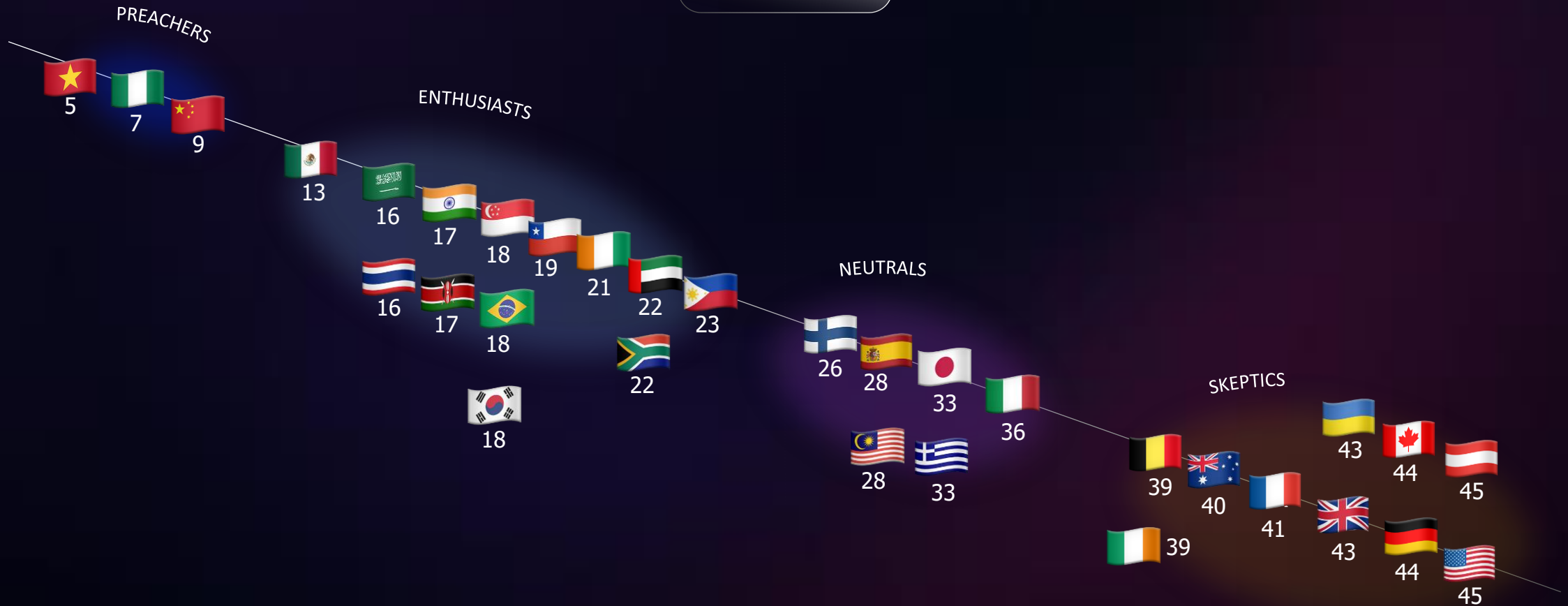


DOUBTERS

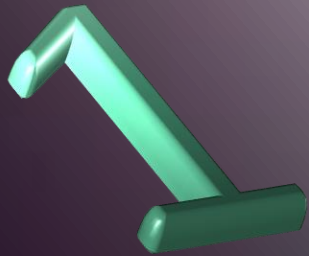
I'm frightened by the possibilities of generative AI

MAINSTREAM

COUNTRIES



AGENDA



What's in it for me?

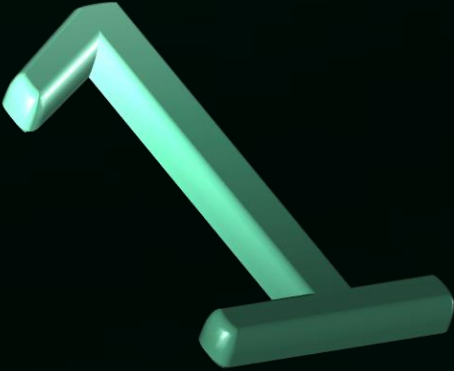


THE NEW AI
SOCIETY:
RULES & BARRIERS



What it takes to be an
AI native brand?

1 - WHAT'S IN IT FOR ME



What's in it
for me?

THE FEAR OF BEING OBSOLETE



INDI
OPPO

our daily lives to
next level

THE FEAR THAT AI COULD BE A DANGER IS AN OLD MYTH

1920



GOLEM

Carl Boese, Paul Wegener

1927



METROPOLIS

Fritz Lang

1968



2001, SPACE ODYSSEY

Stanley Kubrick

2004



I ROBOT

Alex Proyas

2023



LEAVE THE WORLD BEHIND

Sam Esmail

WILL AI SURPASS HUMAN INTELLIGENCE?



May 11, 1997, chess champion Garry Kasparov was defeated by Deep Blue, the supercomputer designed by IBM.

47%
PROSUMERS

55%
MAINSTREAM

I'm afraid, in the future, AI could surpass human intelligence.

BELIEVERS

DOUBTERS



24/43



43/48



44/60



46/57



49/58



51/56



55/59



58/63

IS CREATIVITY ONLY FOR HUMANS?

45%

PROSUMERS

40%

MAINSTREAM

I'm sure Generative AI will be able to replace human creativity.

DOUBTERS

BELIEVERS



41/40 42/33 44/41 45/41



50 /49 53/36 60/61 62/48



Jason Allen's "Space Opera Theatre" - winning the fine arts competition at the Colorado State Fair on September 5, 2022.

AI IS...

A FEAR FOR OTHERS

51%

PROSUMERS

63%

MAINSTREAM

I'm sure AI will kill a lot of jobs in the near future.



42/63



43/52



43/55



45/56



46/67



50/69



54/68



57/71



but not for oneself

11%

PROSUMERS

26%

MAINSTREAM

I think that generative AI will: Destroy my job



0/10



0/6



5/13



9/13



13/23



14/37



14/41



16/34

A POET ROBOT DOESN'T SCARE US.

Boris Vian, 1953 – Letter to André Parinaud.



AN INDIVIDUAL
OPPORTUNITY

Taking our daily lives to
the next level

A WAY TO BECOME MORE PRODUCTIVE

89%

PROSUMERS

74%

MAINSTREAM

I think that generative AI will:
Help me perform better

48%

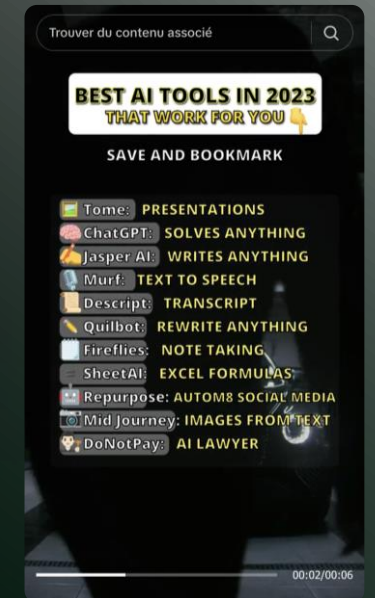
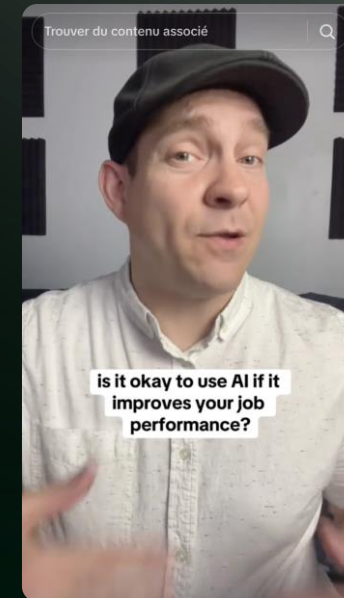
PROSUMERS

29%

MAINSTREAM

I have already used generative AI tools to: Enhance
my way of writing and thinking

Thanks to my 5 favorite AI tools, I'm
working smarter now



A WAY TO BECOME MORE CREATIVE

4

million images generated by AI are produced every day using DALL-E.

“ *We are focusing on how AI can assist us in the creation of our output, not creating the output itself.* ”

Yannick BOLLORÉ - CampAIgn Summer 2023

51%

PROSUMERS

30%

MAINSTREAM

I have already used generative AI tools to: Boost my creativity

42%

PROSUMERS

25%

MAINSTREAM

I have already used generative AI tools to: Make my ideas concrete

A TECH FEAR INDIVIDUAL OPPORTUNITY

Taking our daily
lives to the next
level

CREATING A HEALTHIER WORKPLACE

More equal recruitments

78%

PROSUMERS

63%

MAINSTREAM

I think the use of AI will make the recruitment process more neutral and objective to select candidates



67/53



70/46



76/72



80/53



85/77



85/81



89/77



96/79

More interesting assignments

87%

PROSUMERS

73%

MAINSTREAM

AI will take away the less interesting tasks of my job and help me focus on the most interesting parts



80/64



81/64



83/74



89/65



90/82



90/86



80/64



100/89

FREEING US FROM LABOR

Happier workers

62%

PROSUMERS

41%

MAINSTREAM

I believe this new wave of AI tools is going to build a society ... Where we work less, have more leisure and will be happier



42/24



61/39



61/39



61/49



63/36



70/49



74/60



79/54

MORE AVAILABLE TIME

40%

PROSUMERS

30%

MAINSTREAM

I'm hoping AI tools will become more efficient very soon, so we don't have to work anymore



31/34



33/19



36/26



39/29



41/28



42/30



42/31



48/56

DO YOU WANT TO BECOME HUM.AI.N ?

40%

PROSUMERS

27%

MAINSTREAM

I would love to have generative AI tools implanted in my brain to think more quickly.



19/15



30/29



36/28



41/24



42/33



48/30



67/66



69/56

Elon Musk says Neuralink's first human patient can move a computer mouse with their mind

The brain chip startup performed its first implant in a human last month

Surgeons successfully restore touch and movement in quadriplegic man using AI brain implants

RESEARCH

AI Brain Implant Shows Breakthrough Potential

Sep 26, 2023

The development of brain-computer interfaces takes a leap forward, though scale and commercialization remain a distant possibility.



THE NEW AI SOCIETY: RULES & BARRIERS

AI IS TAKING US INTO A ZERO-RISK SOCIETY



WELCOME TO THE ZERO-RISK SOCIETY

2 - THE NEW AI SOCIETY

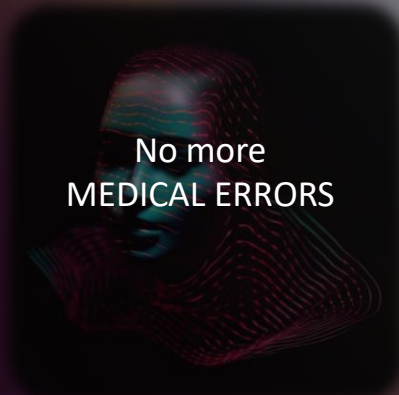
EDUCATION



NO MORE
school failure

@ THEVISUALDOME

MEDICINE



No more
MEDICAL ERRORS

@ PHANTOM.LIMBIC

SAFETY



No more THREATS

@ AI_MADE_ME_DO_THIS

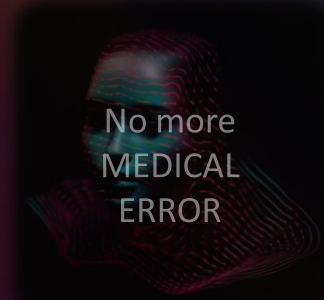
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No more
MEDICAL
ERROR

@ PHANTOM.LIMBIC

SAFETY



No more
THREATS

@ AI_MADE_ME_DO_THIS

AI IS DISRUPTING OUR WAY OF EDUCATING

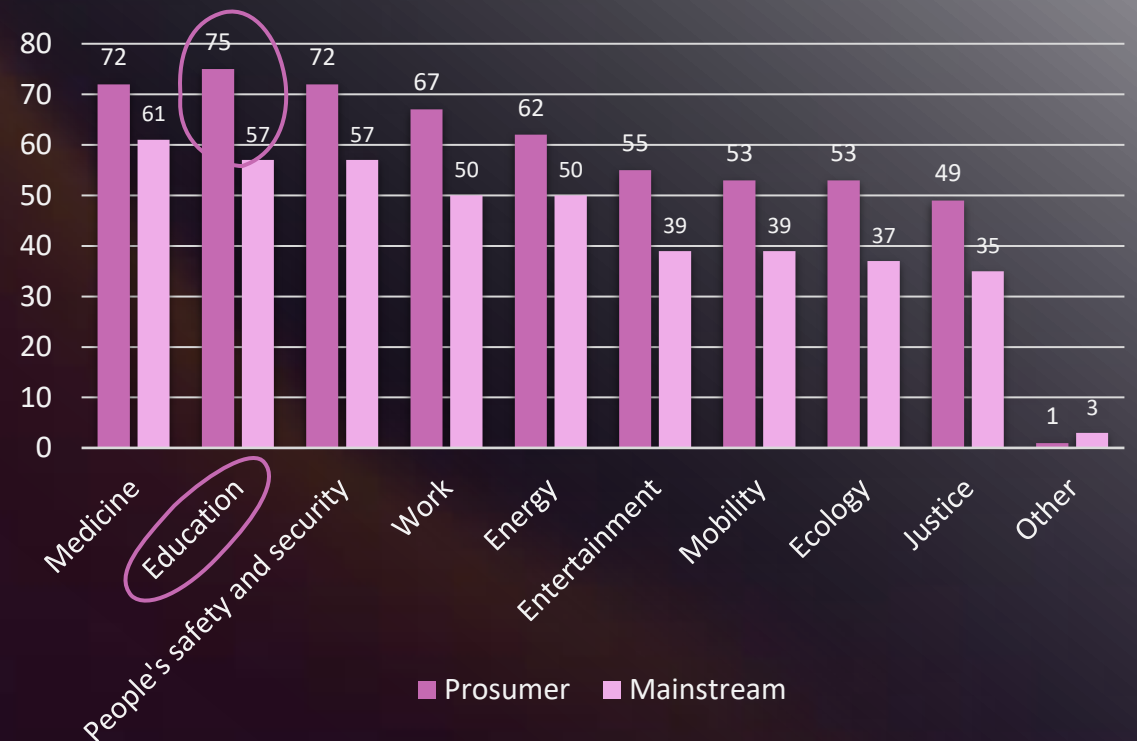
AI can transform education for the better

Meet the companies trying to make it happen



The Economist

I think as a society, we should push AI innovations to improve the following fields:



GIVING BIRTH TO THE AI GENERATION: THEY GREW UP WITH THE INTERNET, THEY WILL LEARN WITH AI

The New York Times

Artificial Intelligence > | A.I. Faces Quiz | How the A.I. Race Began | Key Figures in the Field | One Year of ChatGPT

THE SHIFT

Don't Ban ChatGPT in Schools. Teach With It.

OpenAI's new chatbot is raising fears of cheating on homework, but its potential as an educational tool outweighs its risks.

Gen Z Picks Up Shift With AI

The workforce's attitude toward AI, however, reveals a sizable generational gap. Numerous studies have repeatedly shown that people in the Gen X and Baby Boomer generations are less enthusiastic about AI and are more reluctant to implement generative AI into their work processes.

88%

PROSUMERS

73%

MAINSTREAM

It is essential for new generations to be trained to master generative AI tools.



78/59



84/66



87/62



93/83



94/84



97/69



98/89



97/82

The NEXT challenge will be to upGRADE teachers

63%

PROSUMERS

62%

MAINSTREAM

I'm afraid teachers today are not skilled enough to train their students to properly use Generative AI tools.



43/51



55/60



64/51



64/52



69/70



63/68



75/63



30/20

Alpha vs. Standard School

ALPHA SCHOOL:

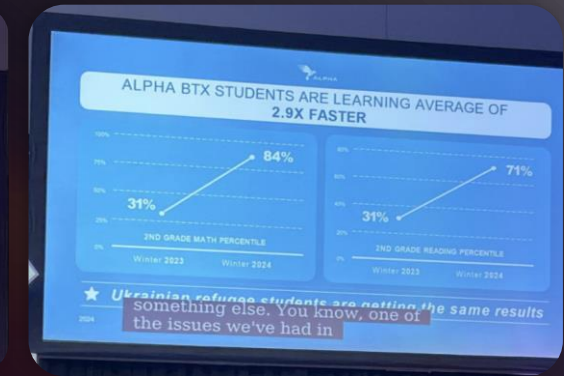
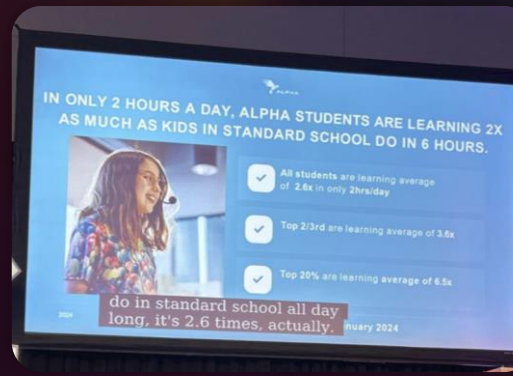
Empowers students with AI to progress at their individual, optimal pace to facilitate the mastery of concepts.



PERSONALIZATION

STANDARD SCHOOL:

Sticks to the average student's pace, creating alarming knowledge gaps and increased boredom.



AI IS OUR NEW TUTOR

gMate Home Chats Tools Subjects Pricing Blog

Chrome Extension English Get S

CheggMate AI - The Ultimate All-in-One Homework AI Agent

Upload Image(png, jpg) here to solve

your question here

HARVARD UNIVERSITY Information Technology Find Tools & Services Report a Problem About IT Service Status Get Help

Initial guidelines for the use of Generative AI tools at Harvard

59%

PROSUMERS

46%

MAINSTREAM

Using Generative AI to complete an exam will be normalized very soon.

      
46/27 47/29 48/45 54/57 60/38 67/56 75/53


66/56

EDUCATION



NO MORE
school failure

@ THEVISUALDOME

MEDICINE



No more MEDICAL
ERRORS

@ PHANTOM.LIMBIC

@ PHANTOM.LIMBIC

SAFETY



No more
THREATS

@ AI_MADE_ME_DO_THIS

AI OFFERS NEW HORIZONS FOR HEALTHCARE

72%
PROSUMERS

63%
MAINSTREAM

I think as a society, we should push AI innovations to improve the following fields: Medicine



60/59



61/59



64/53



66/60



70/62



76/62



79/71



83/70

IBM | Products | Solutions | Consulting | Support | Think

Think | Think 2024 | Artificial intelligence | Cloud | Security | Sustainability | Blog | Videos | Subscribe

What is artificial intelligence in medicine?

How Artificial Intelligence is Disrupting Medicine and What it Means for Physicians

Ted A James, MD, MHCM | April 13, 2023

A DETECTION TOOL YES, A SURGEON, NOT FOR EVERYONE

77%
PROSUMERS

61%
MAINSTREAM

All doctors should be assisted by AI tools to give a better and more informed diagnosis.



42%
PROSUMERS

27%
MAINSTREAM

I would trust an AI to perform a surgery on me.



Google Health | Our mission | Our products | Our partners

AI-enabled imaging and diagnostics previously thought impossible

AI-powered brain surgery becomes a reality in Hong Kong after launch from state-run research centre

WILL AI MAKE US LIVE FOREVER?

THE NEW AI SOCIETY



70%

PROSUMERS

52%

MAINSTREAM

AI is going to become a tool to increase our life expectancy



52/40



72/45



68/45



88/70



69/60



83/72



83/61



85/58

EDUCATION



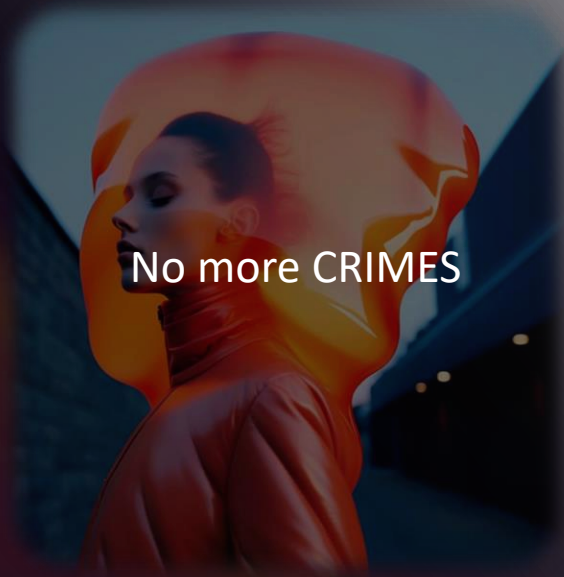
NO MORE
school failure

MEDICINE



No more
MEDICAL
ERROR

SAFETY



No more CRIMES

@ AI_MADE_ME_DO_THIS

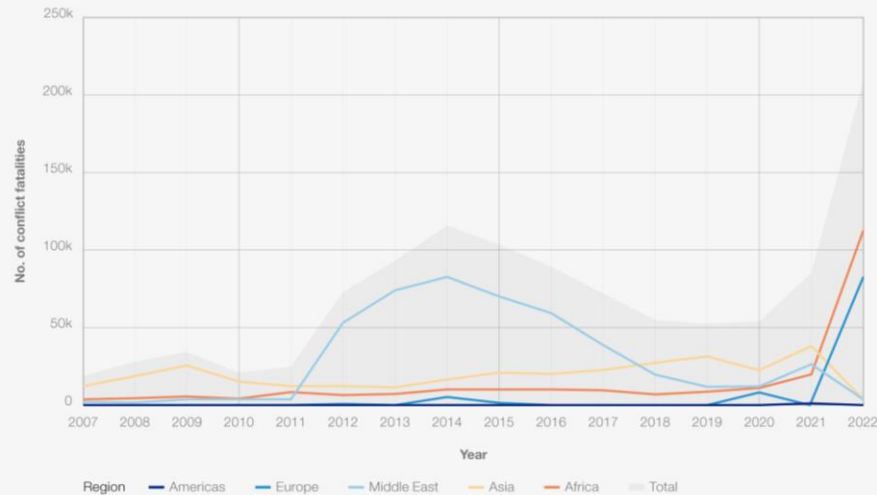
A RESPONSE TO SAFETY CONCERNS

GLOBAL COOPERATION

Global Risks Report 2024: The risks are growing — but so is our capacity to respond

Published Jan 10, 2024 · Updated Jan 11, 2024

B. State-based armed conflict fatalities by region, 2007-2022



80%
PROSUMERS

68%
MAINSTREAM

I'm hopeful AI can help reinforce
people safety.



68/59



69/50



70/57



88/70



83/81



88/77



90/85



93/82

MINORITY REPORT IS THE NEW FAIRYTALE

66%

PROSUMERS

42%

MAINSTREAM

I believe this new wave of AI tools is going to build a society ... Where we will be safer thanks to predictive analysis of crime



57/30



71/52



67/46



69/33



70/28



79/61



94/63



93/82



MINORITY REPORT - 2002

EDUCATION MEDICINE SAFETY

THE ZERO-RISK SOCIETY COMES WITH COSTS AND THREATS

@ THEVISUALDOME @ PHANTOM.LIMBIC @ AI_MADE_ME_DO_THIS

ARE WE PRIVATIZING OUR LIVES?



54%

PROSUMERS

58%

MAINSTREAM

I'm concerned that Generative AI tools are now in the hands of private companies.



37/51



50/64



51/61



53/64



60/50



65/76



68/58



53/56

GIVING UP OUR FREEDOM

GIVE UP DATA

69%

PROSUMERS

67%

MAINSTREAM

I believe this new wave of AI tools is going to build a society ... Where our data will always be scrutinized



57/70 58/60 59/59 66/60 70/68 72/64 82/81



74/69

GIVE UP CONTROL

47%

PROSUMERS

58%

MAINSTREAM

I have concerns about the ethical implications of Generative AI: Because it's going to ruin our autonomous decision-making



32/46 43/49 48/60 48/68 52/67 52/69 55/63



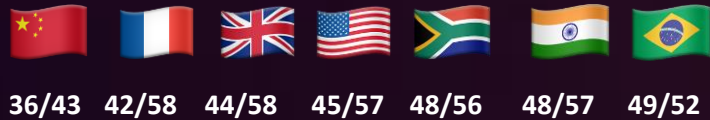
47/60

A MORE UNEQUAL SOCIETY

42%
PROSUMERS

53%
MAINSTREAM

I believe this new wave of AI tools is going to build a society ... Where lots of people will be unemployed



45/59

46%
PROSUMERS

52%
MAINSTREAM

I have concerns about the ethical implications of Generative AI: Because it's replicating biases we all have as human.



16/14

CALLING GOVERNMENTS TO SAFEGUARD US

76%

PROSUMERS

68%

MAINSTREAM

I think governments should regulate the
use of Generative AI.



69/60



69/63



74/72



76/76



77/70



81/79



95/75



92/78



I believe that Europe, in collaboration with its partners, should lead the way towards a new global framework for AI, based on three pillars: safeguards, governance, and innovation guidance.

Ursula von der Leyen - President of the European Commission.

BUT THEY STILL NEED TO BE ASSISTED BY AI



68%

PROSUMERS

47%

MAINSTREAM

I think governments should rely on Generative AI tools to become more efficient.



51/35



58/36



61/36



64/60



83/65



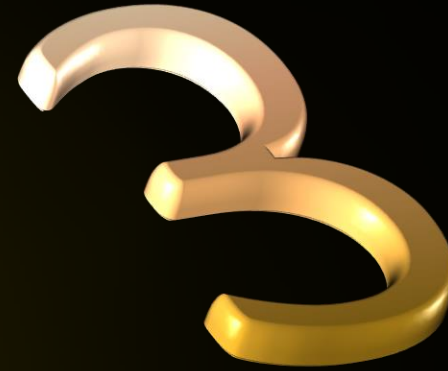
84/72



91/57



86/65



What it takes
to be an AI
native brand?

1.

AI TO PUSH customer
experience FURTHER.

2.

AI & THE FUTURE
OF CREATIVITY

UNLEASHING THE FULL POTENTIAL OF CUSTOMER EXPERIENCE

82%

PROSUMERS

60%

MAINSTREAM

Brands should use generative AI to make my customer experience more efficient and more seamless.



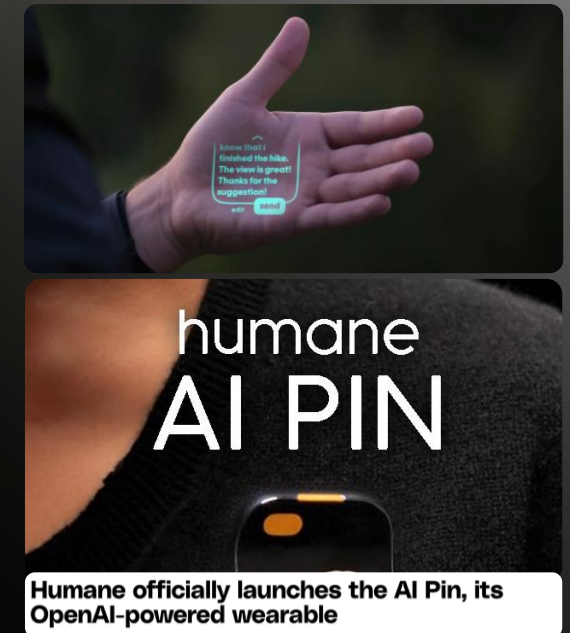
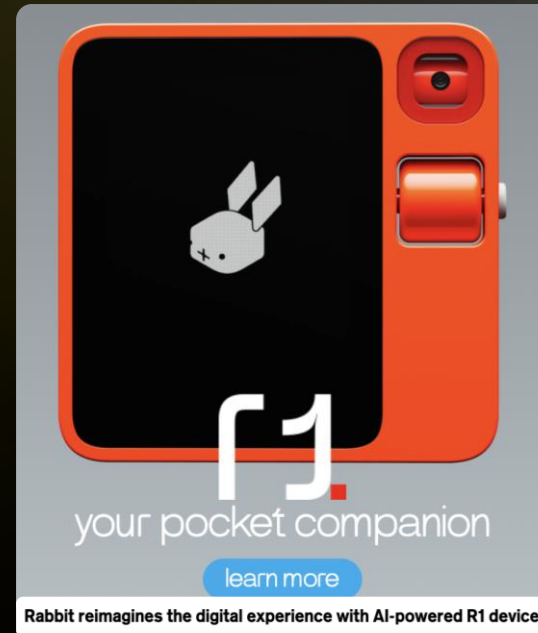
66%
GEN Z

53%
BOOMERS



"Everyone will have an AI-powered personal assistant within 5 years – whether they work in an office or not: they will utterly change how we live."

- Bill Gates



BUT BRANDS NEED TO STAY HUMAN

73%
PROSUMERS

74%
MAINSTREAM

When it comes to customer service, I prefer talking to a human rather than an AI

70%
GEN Z

86%
BOOMERS



89%
PROSUMERS

75%
MAINSTREAM

AI will provide customer service availability 24/7

80%
GEN Z

66%
BOOMERS



Klarna AI assistant handles two-thirds of customer service chats in its first month



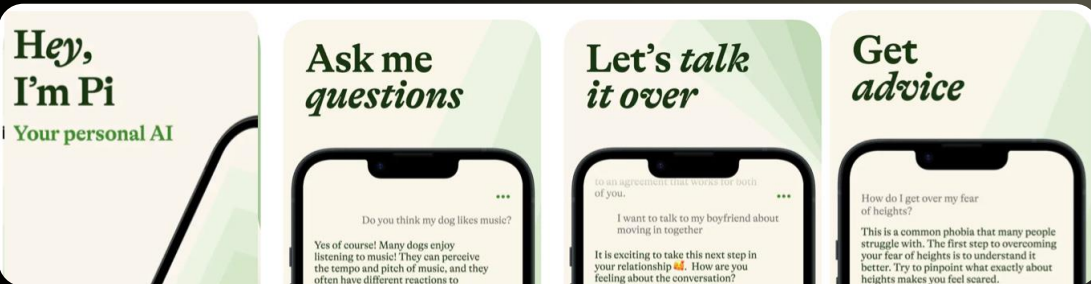
The AI assistant has had **2.3 million conversations**, two-thirds of Klarna's customer service chats



"17% of holiday sales this year were influenced by AI"

Matt Marcotte, SVP, Industry Go To Market, Salesforce

WITH UNLIMITED KNOWLEDGE, AI IS BECOMING A PERSONAL ASSISTANT



"Pi is a personal AI designed to be a supportive and friendly companion."

85%

PROSUMERS

66%

MAINSTREAM

Brands should use generative AI to personalize products and services to my tastes

80%

PROSUMERS

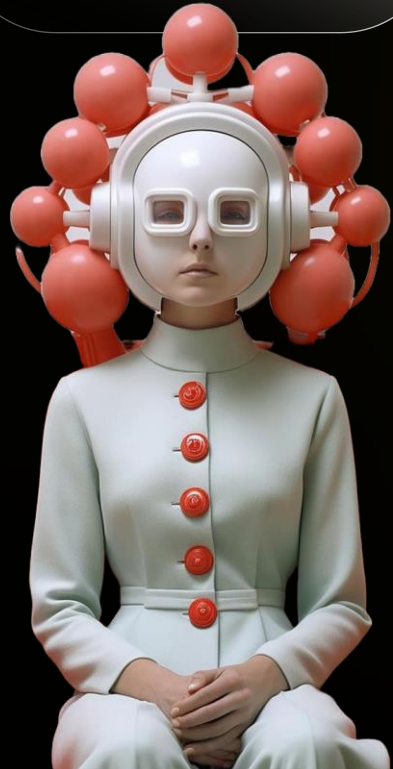
59%

MAINSTREAM

I would trust an AI to recommend me some products that would fit my needs.

TOWARDS A NEW ERA FOR COMMERCE

CONVERSATIONAL
COMMERCE



PREDICTIVE COMMERCE



COMPANION
COMMERCE



1.

AI TO PUSH customer
experience FURTHER.

2.

AI & THE FUTURE
OF CREATIVITY

AI IS NOT REPLACING HUMAN CREATIVITY ANYTIME SOON

58%

PROSUMERS

43%

MAINSTREAM

I'm able to see the difference between content created by an AI and content created by people.



32/29



54/38



57/46



58/52



61/46



75/52



80/74

60%

GEN Z

30%

BOOMERS

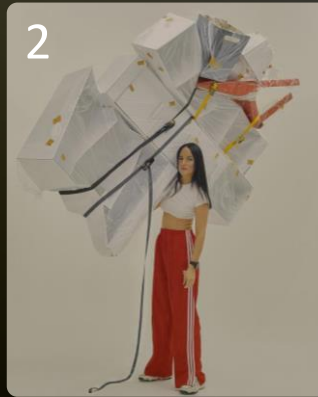


81/63

Find THE AI-generated photos



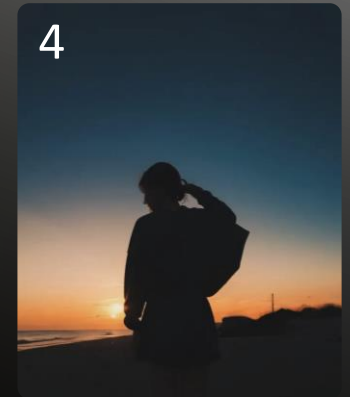
@ BRUCE EESLY



@ NHU XUAN HUA & VIMALA PON



@ BERISTAIN ANDONI



@ MARIKA_IN

AI IS NOT REPLACING HUMAN CREATIVITY ANYTIME SOON

58%

PROSUMERS

43%

MAINSTREAM

I'm able to see the difference between content created by an AI and content created by people.



32/29



54/38



57/46



58/52



61/46



75/52



80/74

60%

GEN Z

30%

BOOMERS



81/63

Find THE AI-generated photos



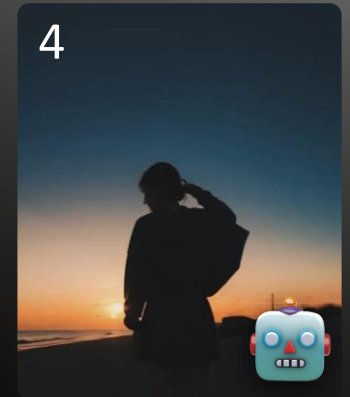
@ BRUCE EESLY



@ NHU XUAN HUA & VIMALA PON

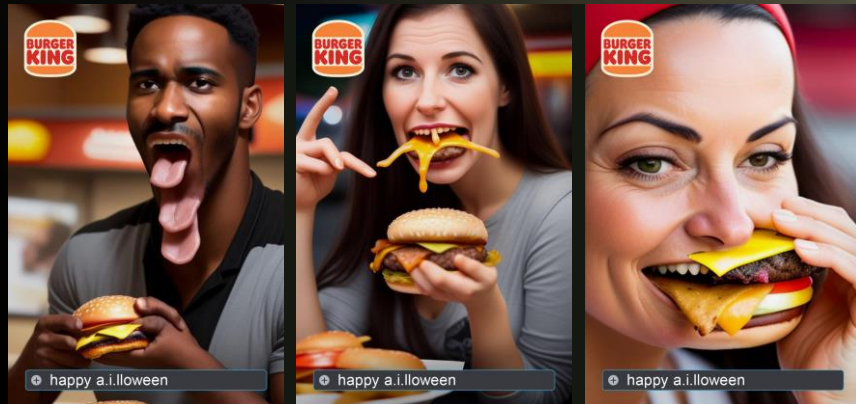


@ BERISTAIN ANDONI



@ MARIKA_IN

AS LONG AS WE KNOW HOW TO CREATE AN EMOTIONAL CONNECTION



59%

PROSUMERS

46%

MAINSTREAM

I don't care if an AI creates a piece of art (music, film, painting, writing) as long as I find it beautiful and moving.



48%

GEN Z

46%

BOOMERS



63/52

AI BRINGS NEW CHALLENGES AND BRANDS CAN PLAY THEIR PART IN SOLVING THEM

3 - WHAT IT TAKES TO BE AN AI NATIVE BRAND?

PROTECT INTELLECTUAL PROPERTY

Interactive AI-Powered Van Gogh Wants To Talk With You About Life, And Death

Leslie Katz Contributor @
I write about the intersection of art, science and technology.

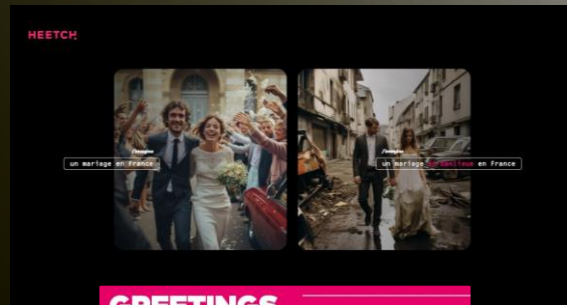
Follow

Dec 14, 2023, 02:48pm EST

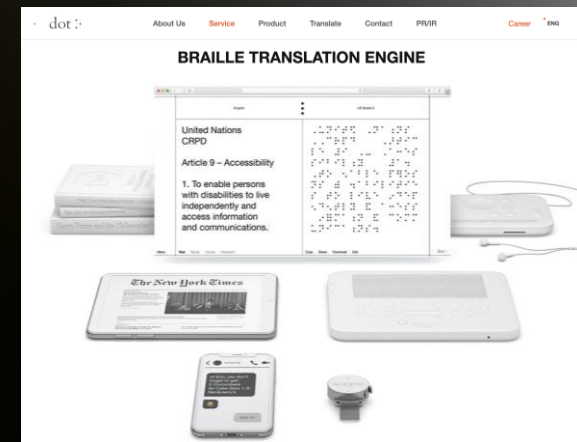


Vincent van Gogh the digital human gestures with its hands as it answers a viewer's question.
JIMBO MANA

FIGHT BIASES



CREATE EMPOWERMENT



IN A NUTSHELL

- The breakthrough of GenAI has convinced Prosumers that it's a massive revolution and they should jump on the bandwagon or be left out
- GenAI is seen as the new MessAIh, able to solve problems humans can't solve. A new cult that will create a divide between believers and doubters
- GenAI may be frightening for others but not for oneself: it's seen as a way to become more productive, more creative, and could ultimately free us from labor
- The GenAI revolution could help us build a "zero risk" society, but this society comes with a cost: privatization of our lives, less freedom, and a more unequal society
- Building an AI-native brand means:
 - More efficiency and seamlessness in the customer experience
 - Pushing creativity further while protecting an ownable tone of voice



/ PROSUMER 2024

GEN.

What Kind of World Will We Live In?

APRIL 2024

HAVAS

