

Brazil
China
France
Germany
India
UK
USA

WE ASKED THE WORLD

WHAT DO PEOPLE AROUND THE WORLD
THINK AND FEEL ABOUT TECHNOLOGY?

FOCUS: AI SKILLS

**T
E
C
H**
COMPASS
2025

WHAT'S INSIDE?

FOREWORD

PAGE 03

SUMMARY

PAGE 05

AI SKILLS

PAGE 06

ATTITUDES

PAGE 20

FUTURE

PAGE 23

HOPES/FEARS

PAGE 26

WHAT IF...?

PAGE 29

STUDY DESIGN

PAGE 34

THE IDEA

We've entered the age of artificial intelligence. History will define exactly when it started, but it's clear that people are interacting with AI right now, across the globe. It could be at work, in education, or in their personal lives. AI is all around us and it's becoming increasingly powerful.

This opens up opportunities, but how can we use AI best to increase our productivity, our efficiency, and our success? Do we have the AI skills we're going to need?

Our fourth annual Bosch Tech Compass addresses exactly these questions. Tech Compass is a representative survey of the populations of Brazil, China, France, Germany, India, the United Kingdom, and the United States. It asks for opinions on a wide variety of technology-related topics. This year it examines the vector between AI and people: are we really ready for AI?

There are many fascinating insights. Four out of five people around the world plan to educate themselves about AI. That's a significant number and it shows that many people are eager to identify the opportunities that AI presents and bring the technology into their everyday lives.

Another is that 28% of respondents report that they've already received AI training at work. For many people, their working life is where they'll interact with AI the most. If they understand what AI can do in their own area of expertise, the broader opportunities will be clearer. In turn, AI will become less of a threat.

At Bosch, we're rolling out AI across our organization. One in two Bosch plants now use AI for tasks like production scheduling and quality control. Every Bosch product is now either AI-enabled, or developed or manufactured with its help. And we're actively promoting AI literacy among our workforce with numerous training initiatives.

An outcome that intrigued me personally is that almost two thirds of people support AI becoming a standalone subject in schools. We clearly not only want to learn more about AI ourselves, we want our children to understand it as well.

Many people are anxious about the impact of AI. At Bosch, we're focusing on the opportunities it offers: if applied responsibly, AI enables productivity and efficiency gains that can free up people's time to do more of what they do best.

Tech Compass gives us a valuable insight into how people view technology – how they use it, what feelings it evokes, and how they can benefit from it. Having read Tech Compass 2025, I'm convinced we're on the right path with AI. It's leading us toward a more convenient, sustainable, and prosperous future.

Welcome to the age of AI.

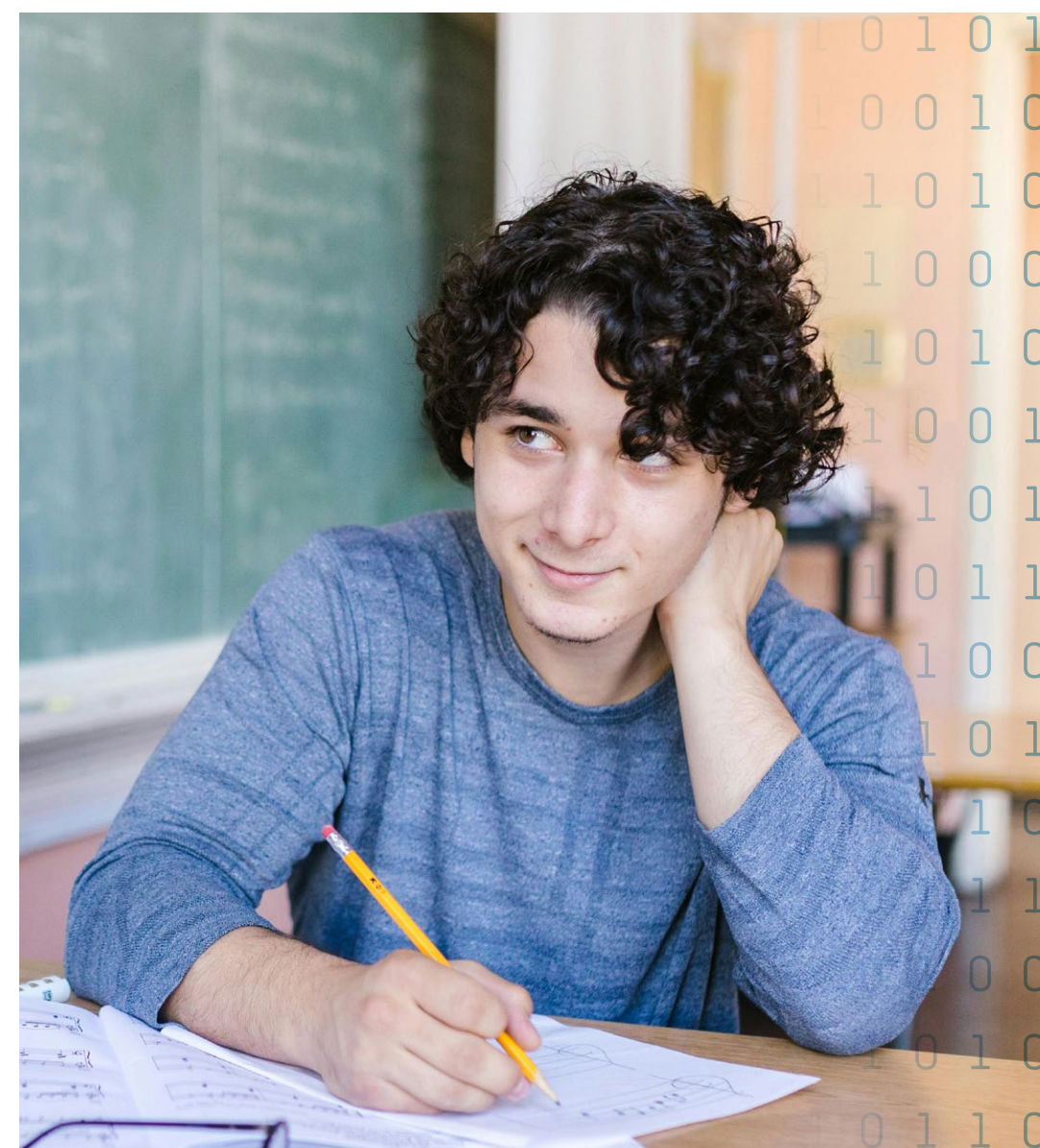


Dr. Stefan Hartung
Chairman of the board of management
of Robert Bosch GmbH



4 OUT OF 5 PEOPLE WORLDWIDE PLAN TO EDUCATE THEMSELVES IN THE FIELD OF AI

63% WORLDWIDE SUPPORT AI AS A SCHOOL SUBJECT



53% OF RESPONDENTS USE AI TOOLS (AT LEAST RARELY) AT WORK



1 IN 4 PEOPLE HAVE ALREADY RECEIVED AI TRAINING IN THEIR WORKPLACE



67% WORLDWIDE BELIEVE AI IS THE MOST RELEVANT TECHNOLOGY OF THE FUTURE (2024: 64%, 2023: 41%)

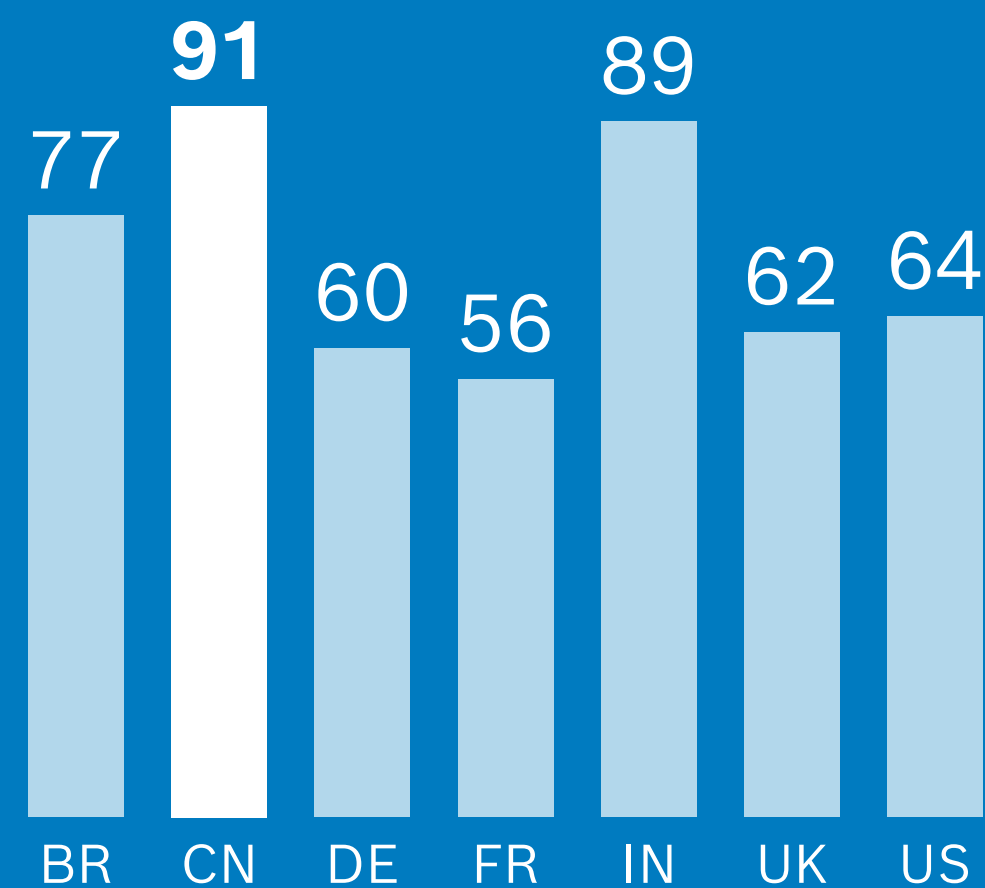
AI SKILLS

FUTURE IMPORTANCE OF AI SKILLS?

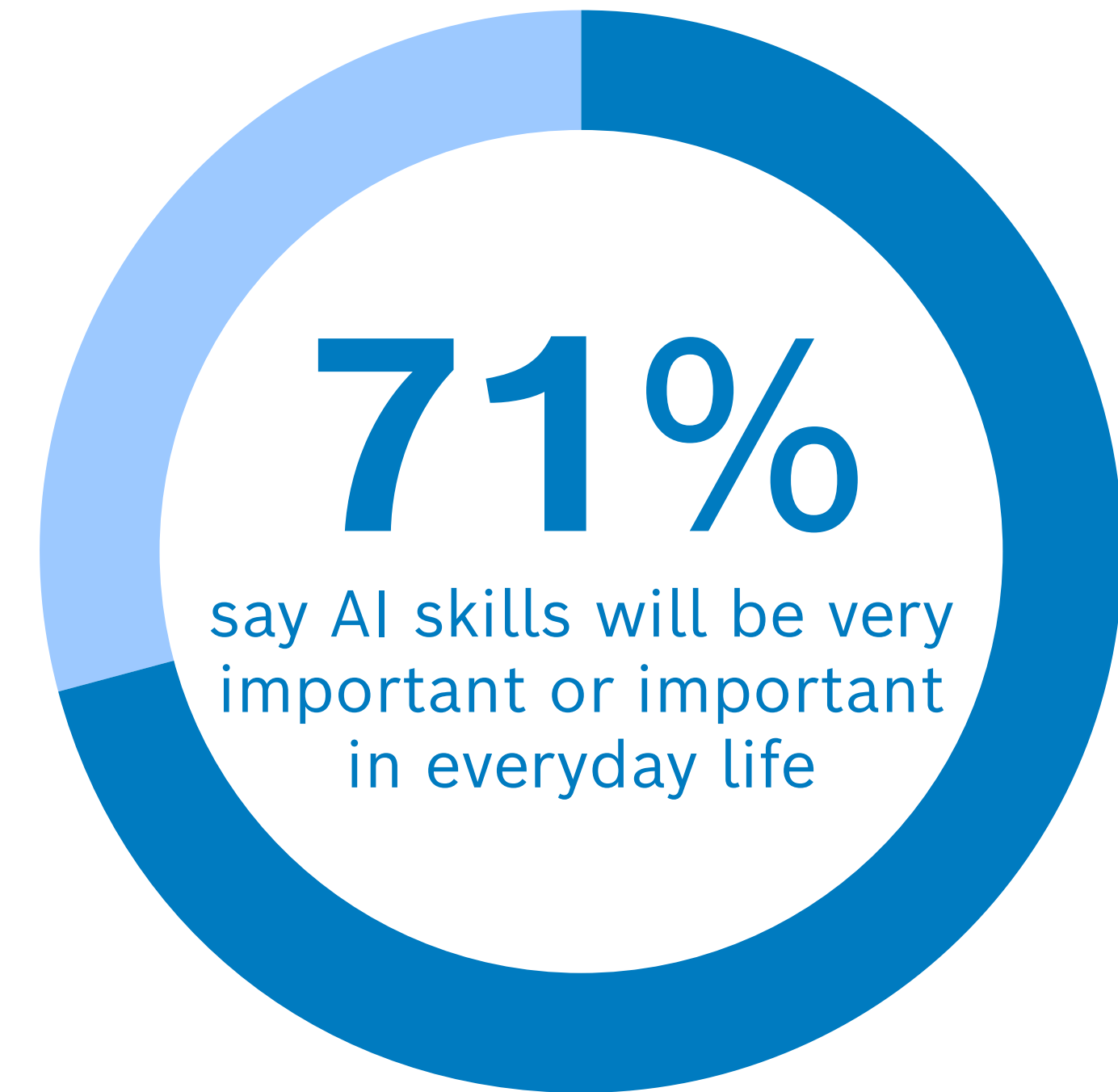
How important do you think AI skills will be for your everyday life in the future?

REGIONAL

The vast majority of people in China (91%) think AI skills will be important in everyday life in the future, and a similar percentage of respondents in India (89%) agreed. Collectively, Western countries scored alike, with a spread between 56% and 64%.



BR N=2002, CN N=2004, DE N=1018, FR N=1002, IN N=2003, UK N=1000, US N=2001. Answers in %.



GLOBAL INDEX

On a global level, the clear majority (71%) of respondents believe that AI skills will be important or very important in the future.

Answers were scaled from 1 to 4. Top-2-Box Results. N=11030. Answers in %.

WHAT SHOULD WE LEARN?

What are the most important skills for individuals to thrive in an AI-driven world?

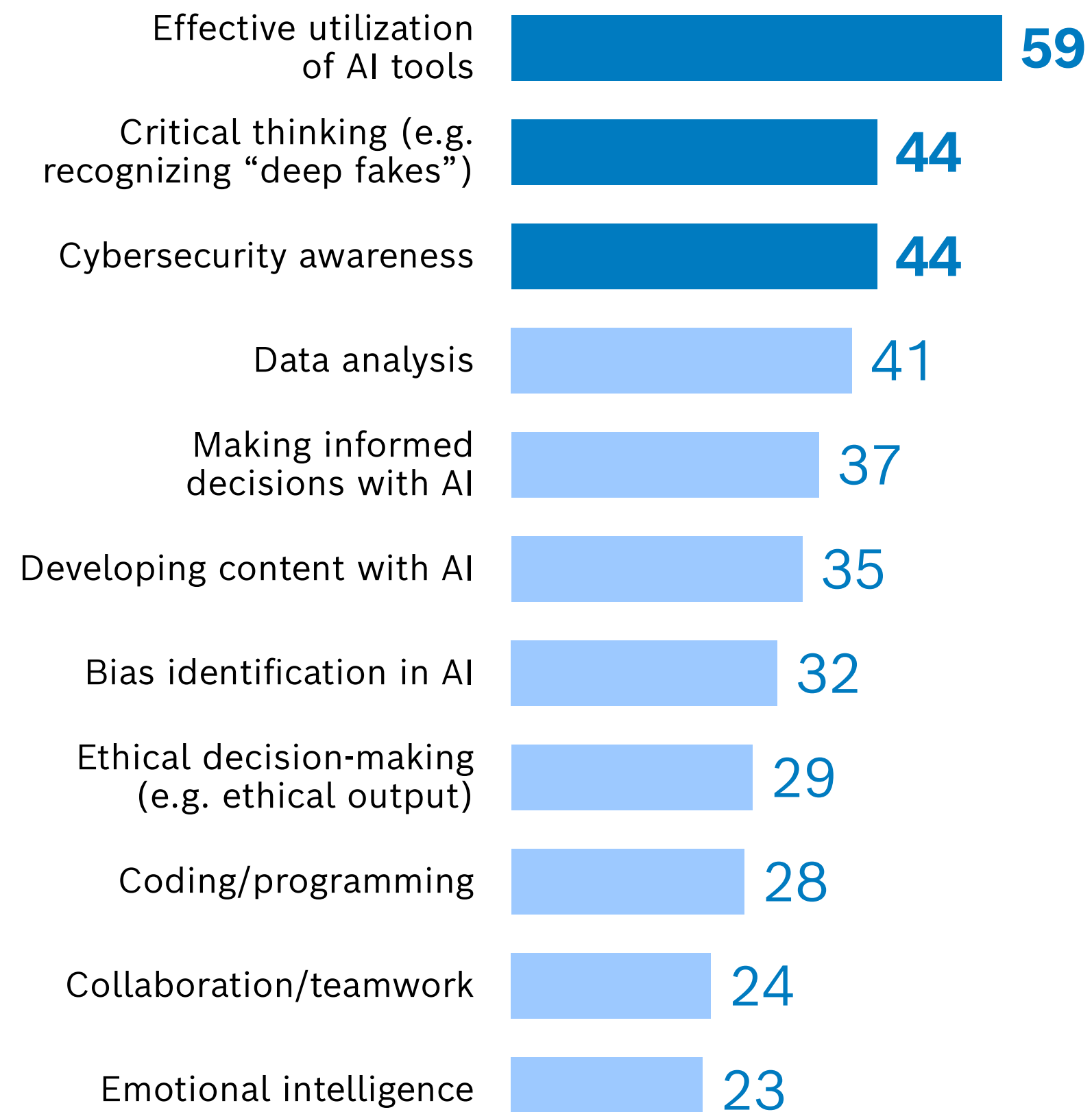
GLOBAL INDEX

Knowing how to use AI tools was the most important skill that people need to learn, according to the survey (59%). Thinking critically about AI and how it's used was rated as the second most important skill, alongside understanding cybersecurity (both 44%).

REGIONAL

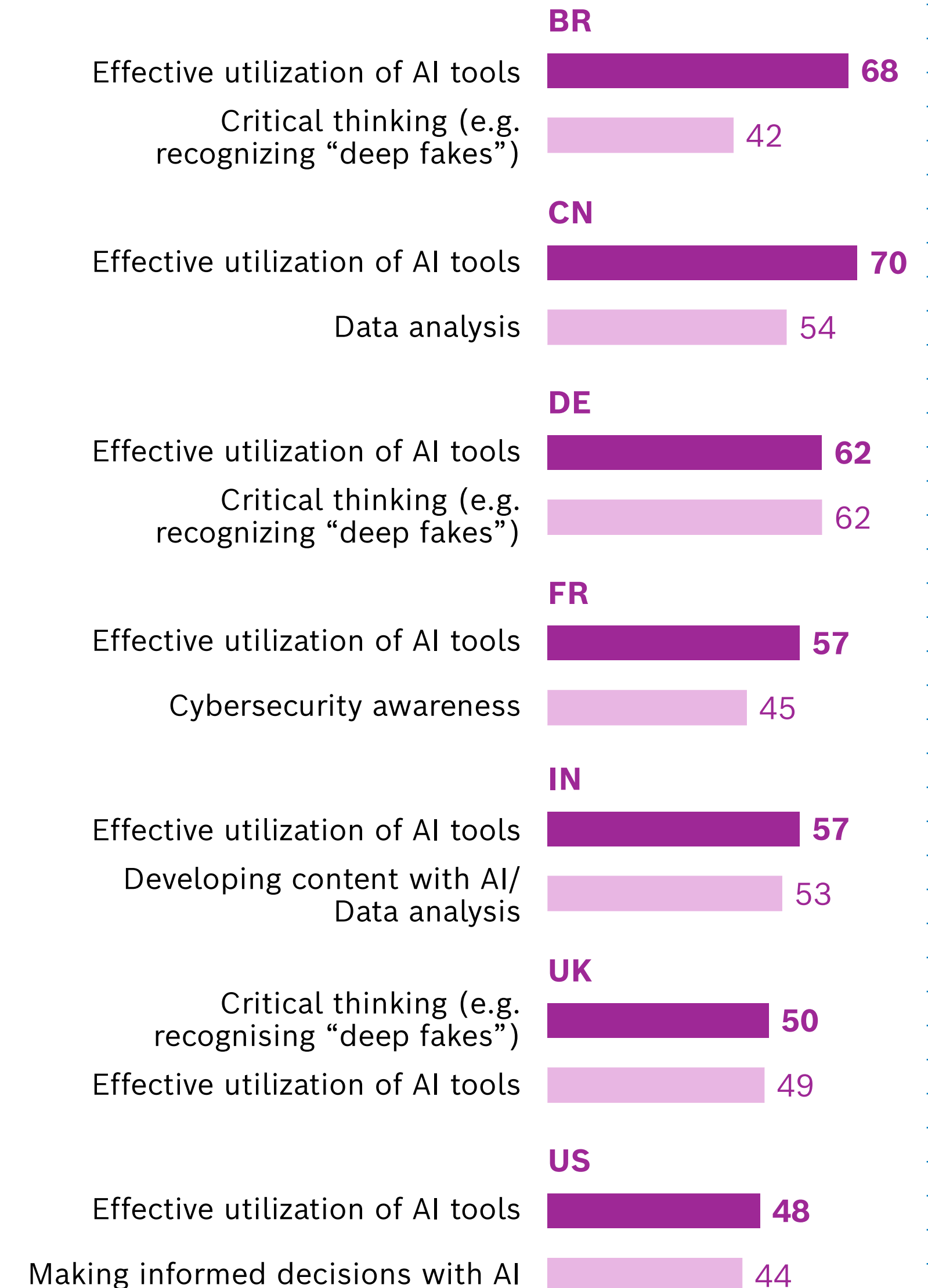
Every country except the UK rated effective utilization of AI skills as the most important skill. In the UK it was a close result between critical thinking and effectively using AI skills (50% versus 49%).

GLOBAL INDEX



N=11030. Answers in %.

REGIONAL TOP TWO



BR N=2002, CN N=2004, DE N=1018, FR N=1002, IN N=2003, UK N=1000, US N=2001. Answers in %.

HOW WILL YOU STUDY AI?

How are you planning to educate yourself about AI in the future?

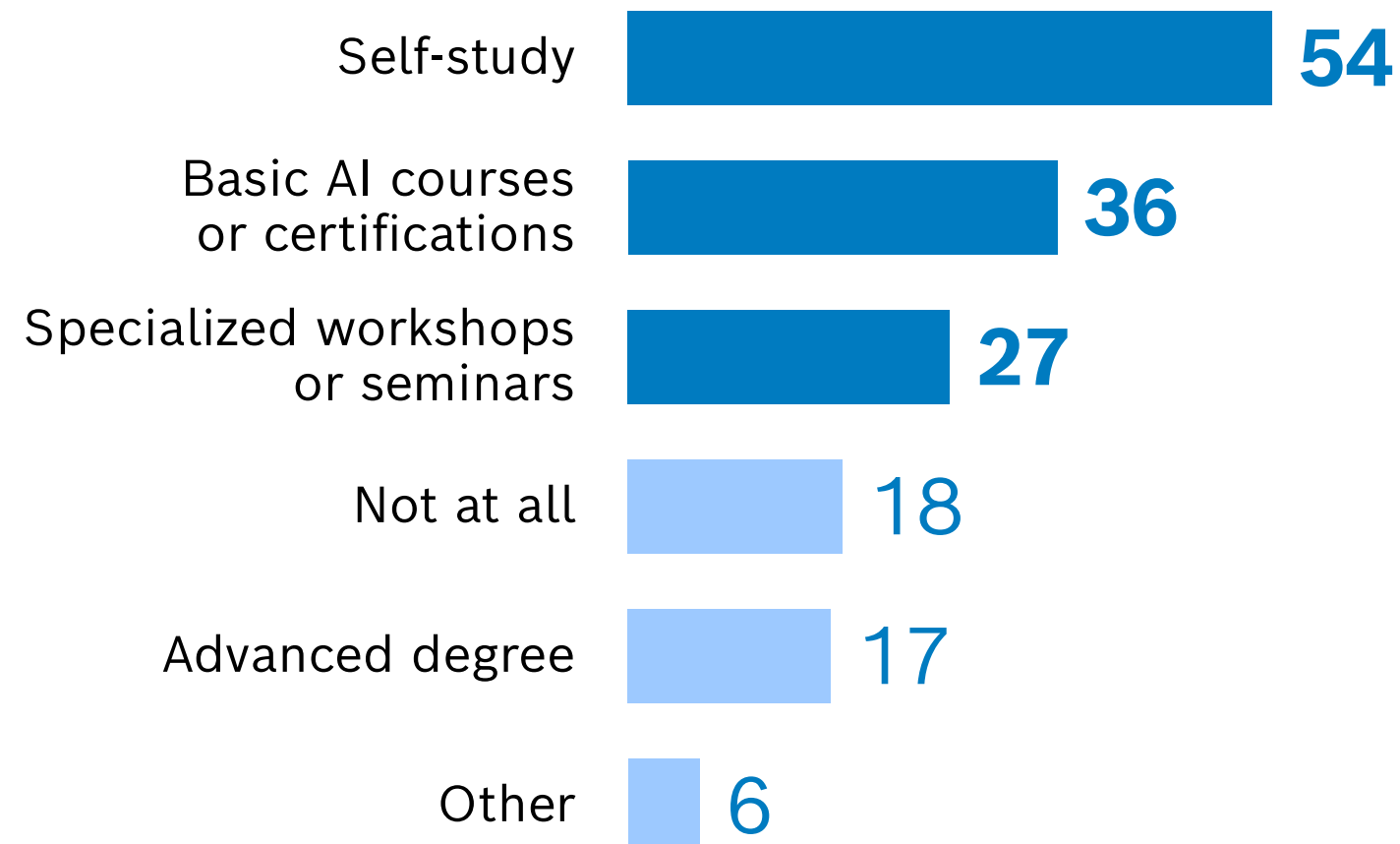
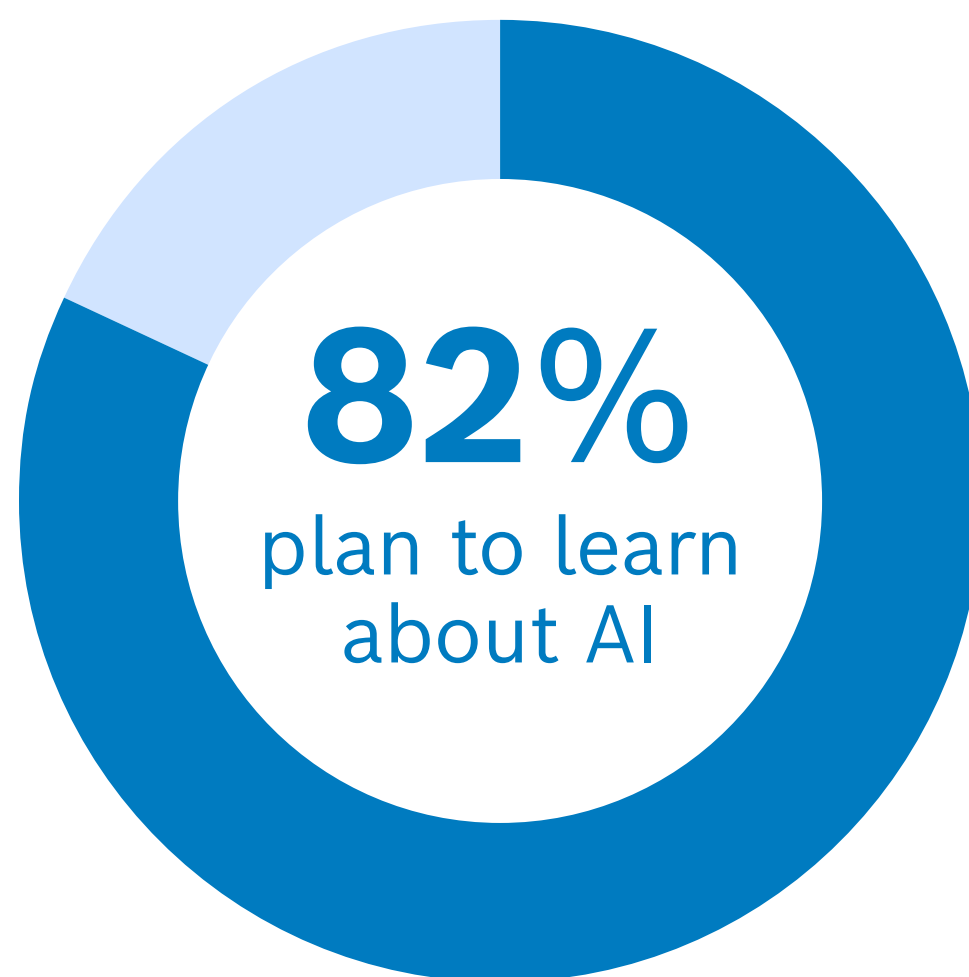
GLOBAL INDEX

People want to learn about AI: four in five (82%) have plans to educate themselves about AI. And many want to take certifications, seminars, and degrees. Only 18% said they have no plans to get clued up about AI.

REGIONAL

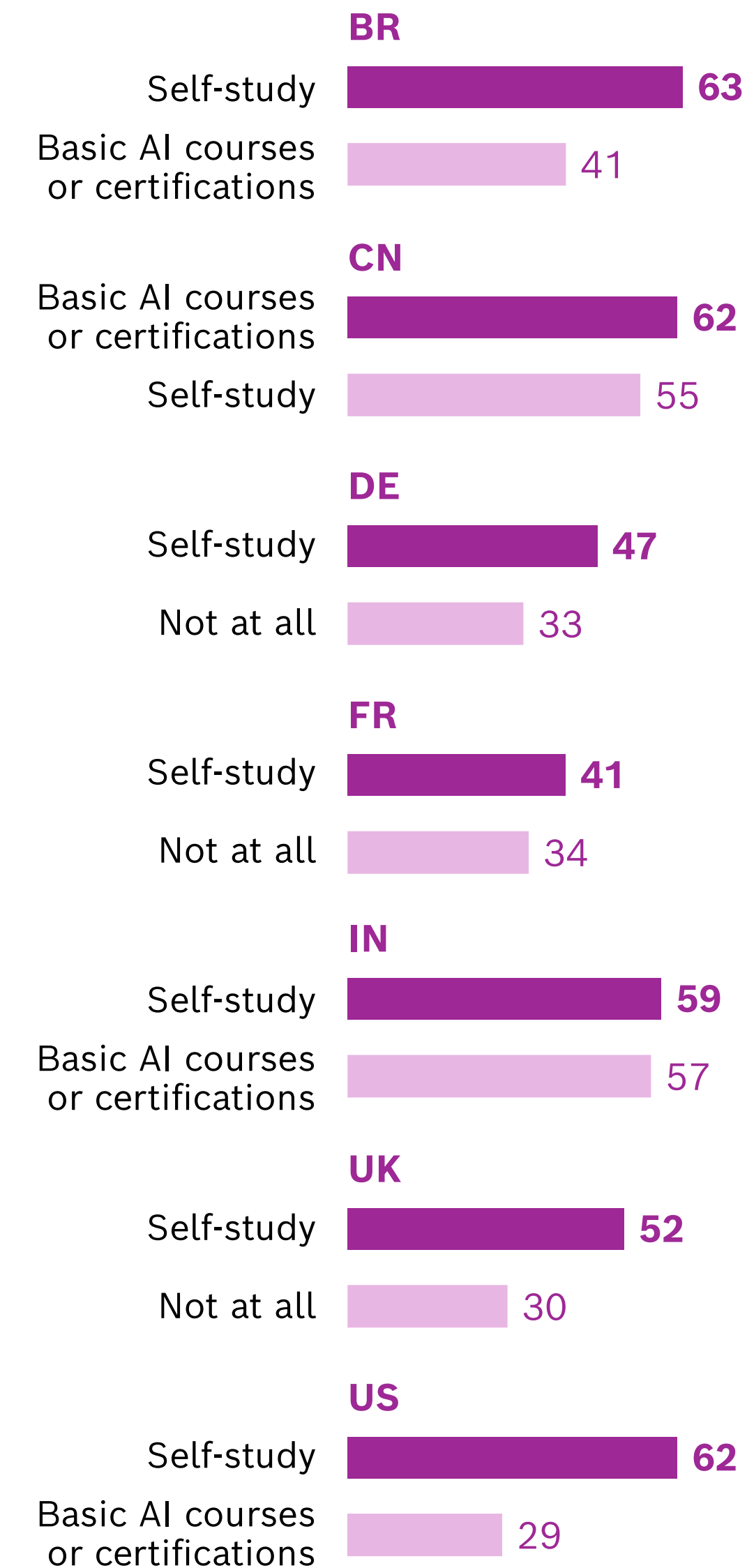
The highest proportion of people who want to learn about AI was in India, with 98% having some sort of plan. For European countries, two thirds of people have an intention to begin their AI education.

GLOBAL INDEX



N=11030. Answers in %.

REGIONAL TOP TWO



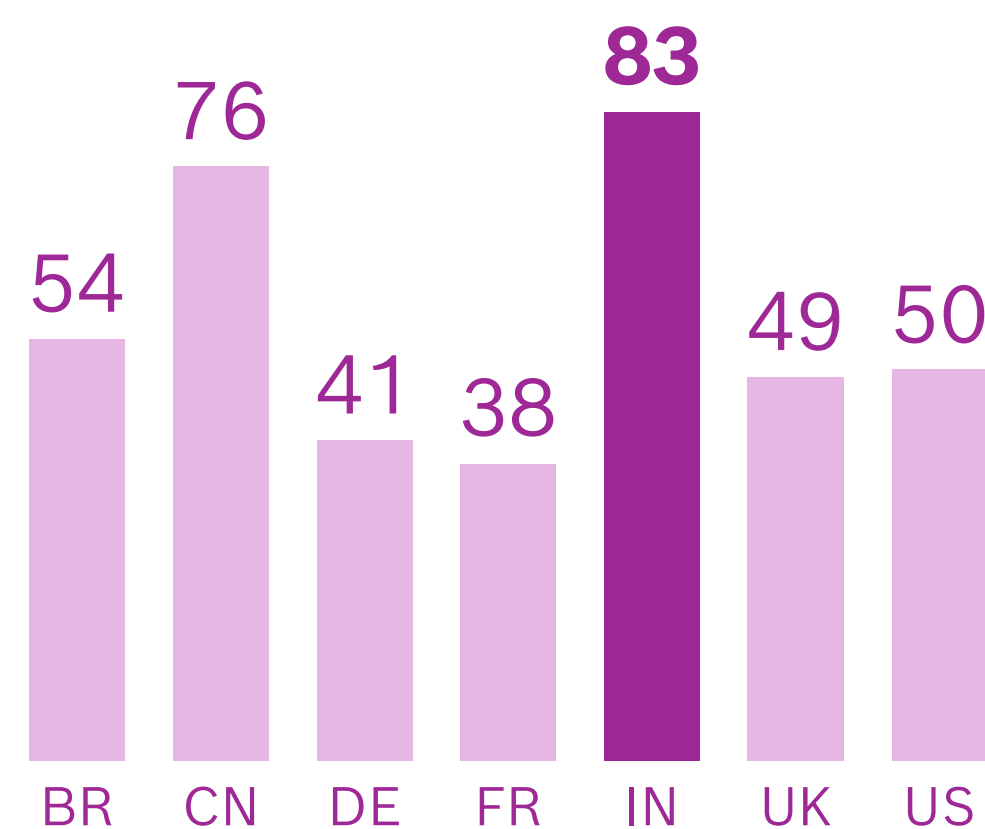
BR N=2002, CN N=2004, DE N=1018, FR N=1002, IN N=2003, UK N=1000, US N=2001. Answers in %.

WORKING WITH AI ALREADY

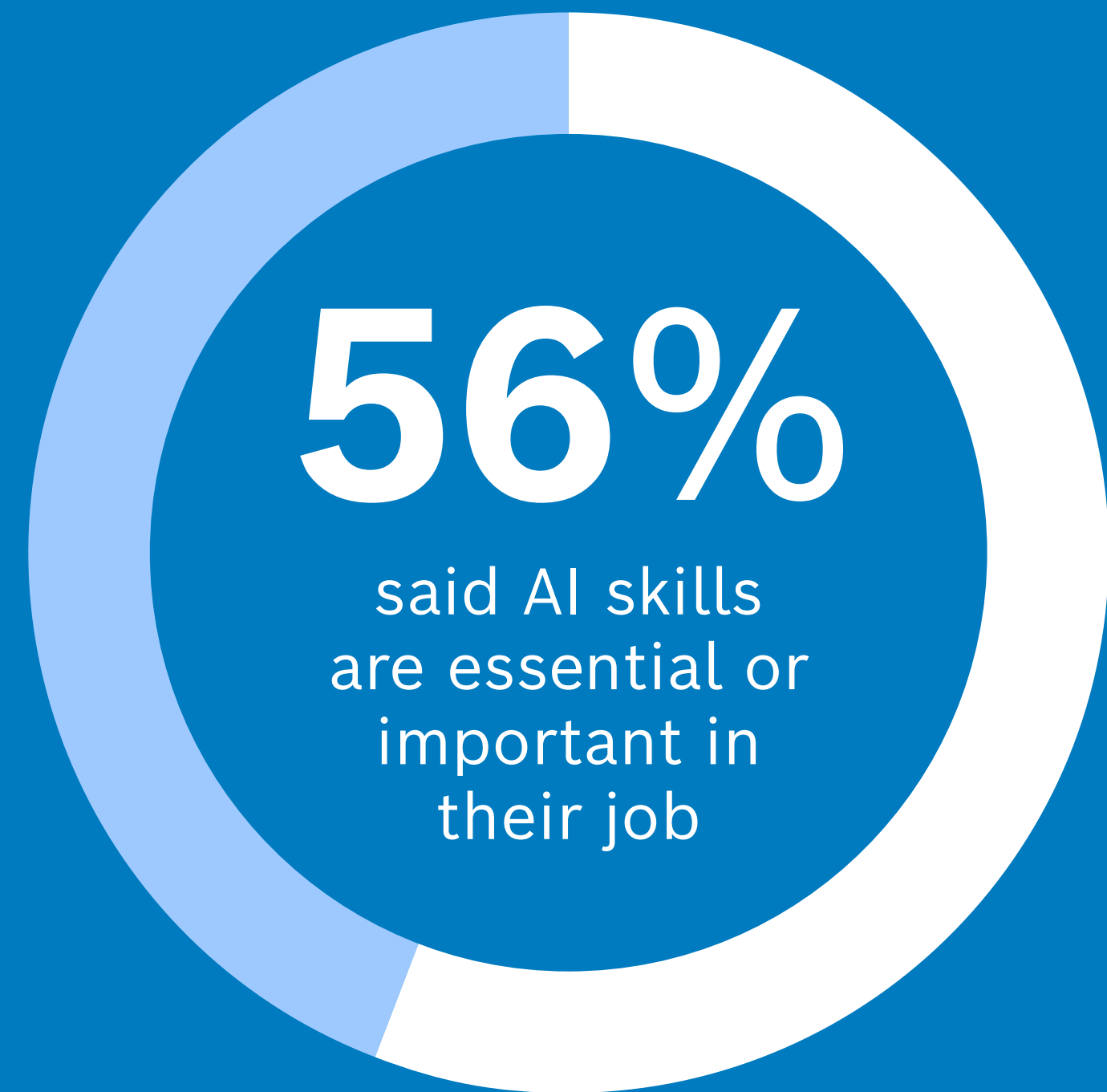
How important are AI skills in your current job?

REGIONAL

There are large differences between countries, with respondents from India (83%) and China (76%) recording high levels of AI importance in their current job. This dropped to around half of respondents in the other countries, and only 38% in France.



BR N=2002, CN N=2004, DE N=1018, FR N=1002, IN N=2003, UK N=1000, US N=2001. Answers in %.



GLOBAL INDEX

The majority of people (56%) said AI skills are already essential or important in their current job, while 44% said AI skills are somewhat or not important.

Answers were scaled from 1 to 4. Top-2-Box Results. N=11030. Answers in %.

USING AI AT WORK

How often do you use AI tools at work?

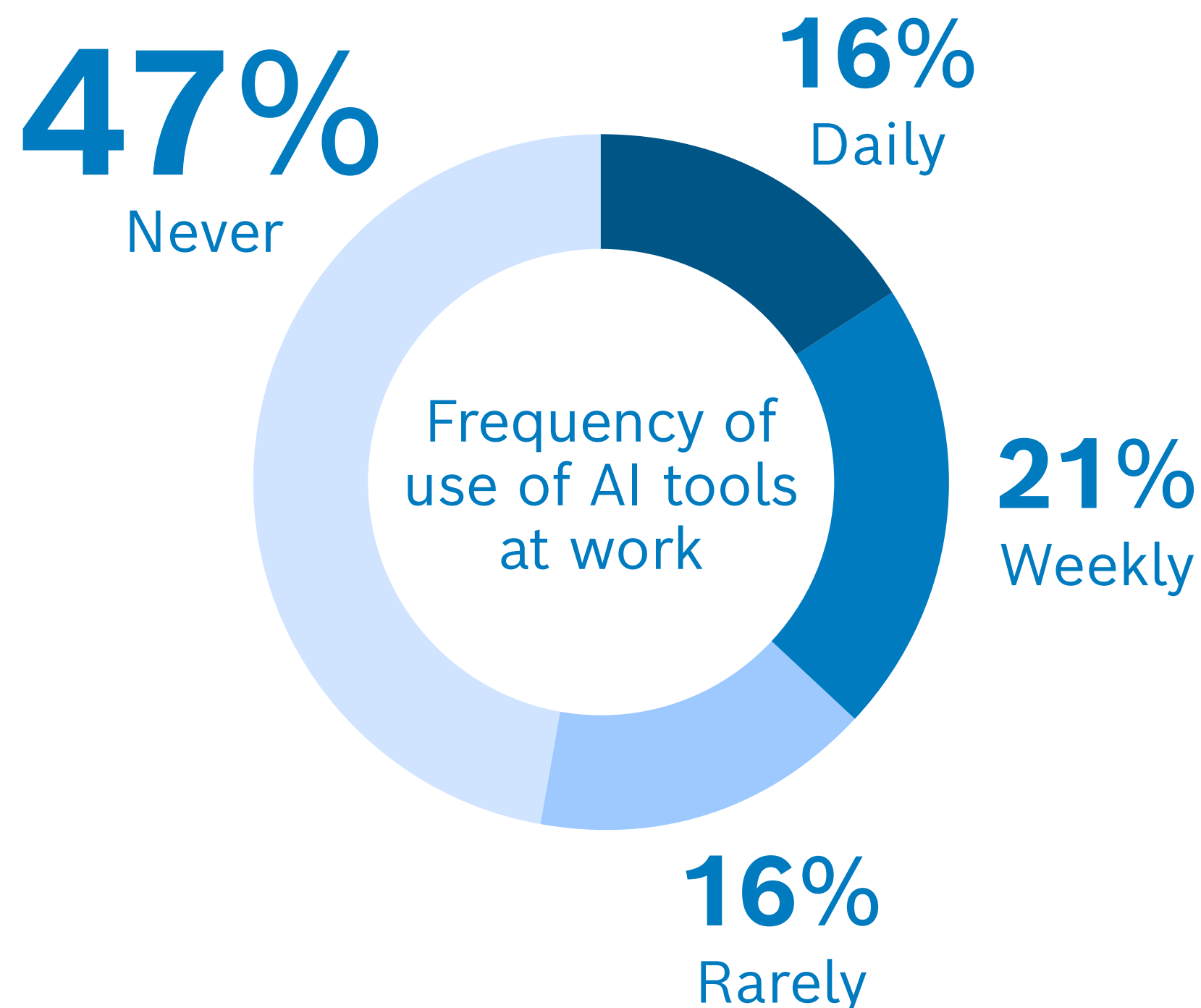
GLOBAL INDEX

There's an equal divide in the results but closer examination reveals that one in two people (53%) use AI at work at least rarely. Europe lags behind – many people say they never use AI at work.

REGIONAL

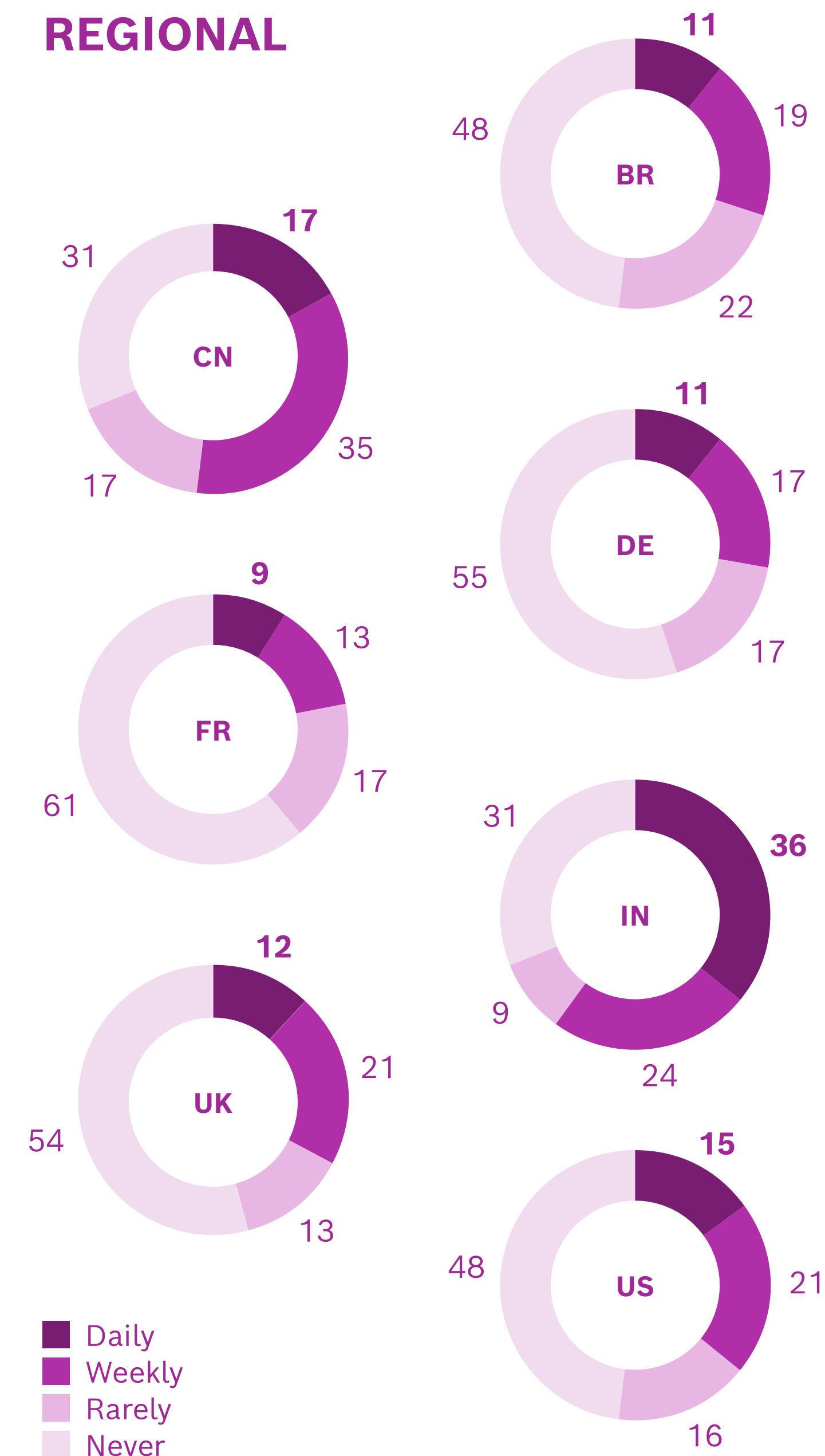
There's a pattern across the Tech Compass results that suggests Asian countries are using AI tools more frequently than other countries and this question confirms that. Recording comfortably higher results than the other countries are India and China, both with 69%.

GLOBAL INDEX



All Countries N=8568. BR N=1447, CN N=1951, DE N=804, FR N=651, IN N=1656, UK N=817, US N=1242. Answers in %.

REGIONAL



LEARNING ABOUT AI AT WORK

Have you ever received any AI training in your workplace?

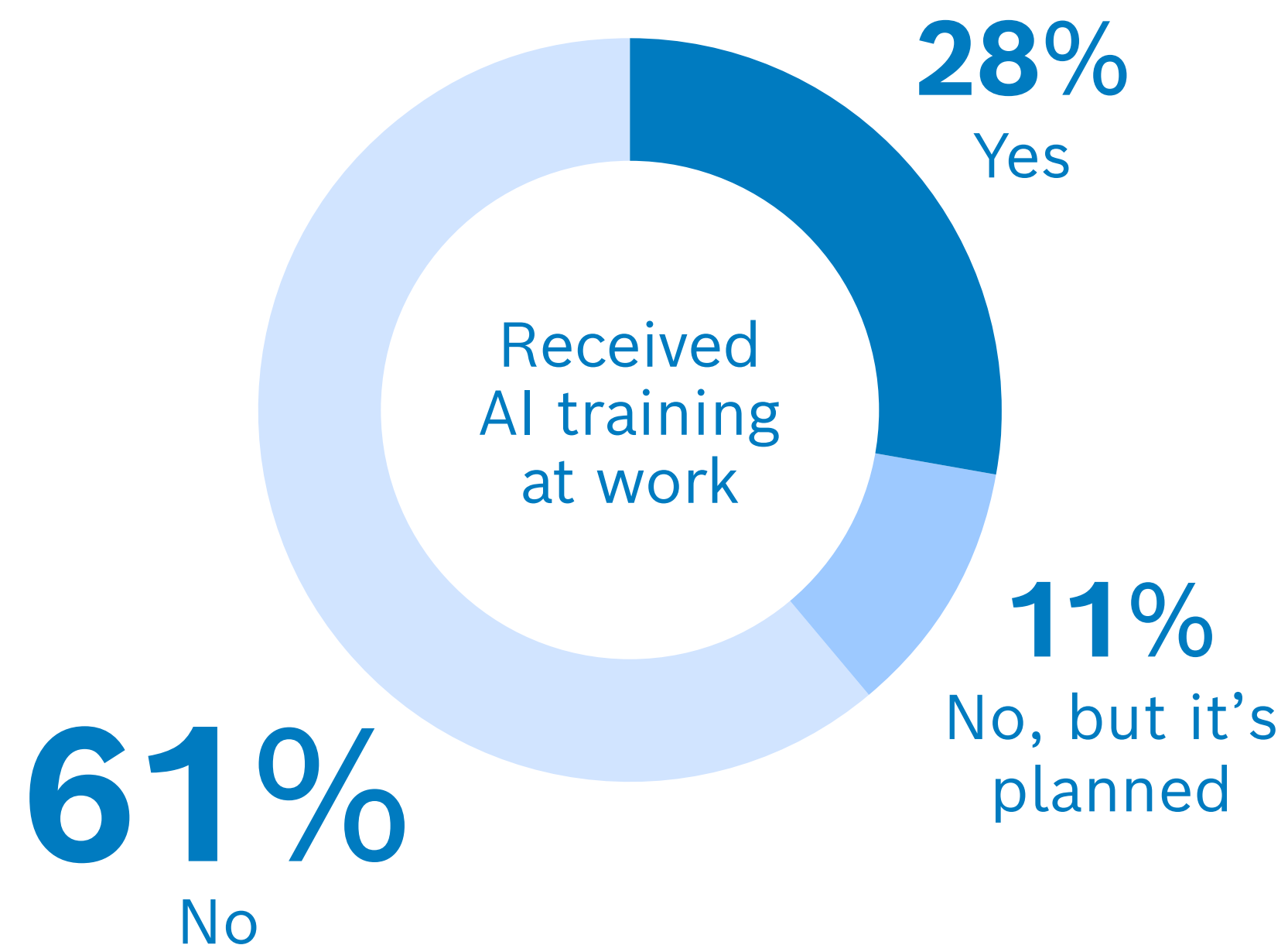
GLOBAL INDEX

Around a quarter of people have already received some training in AI at their workplace, and this rises to 39% when factoring in those who expect to learn about AI at their workplace in the near future.

REGIONAL

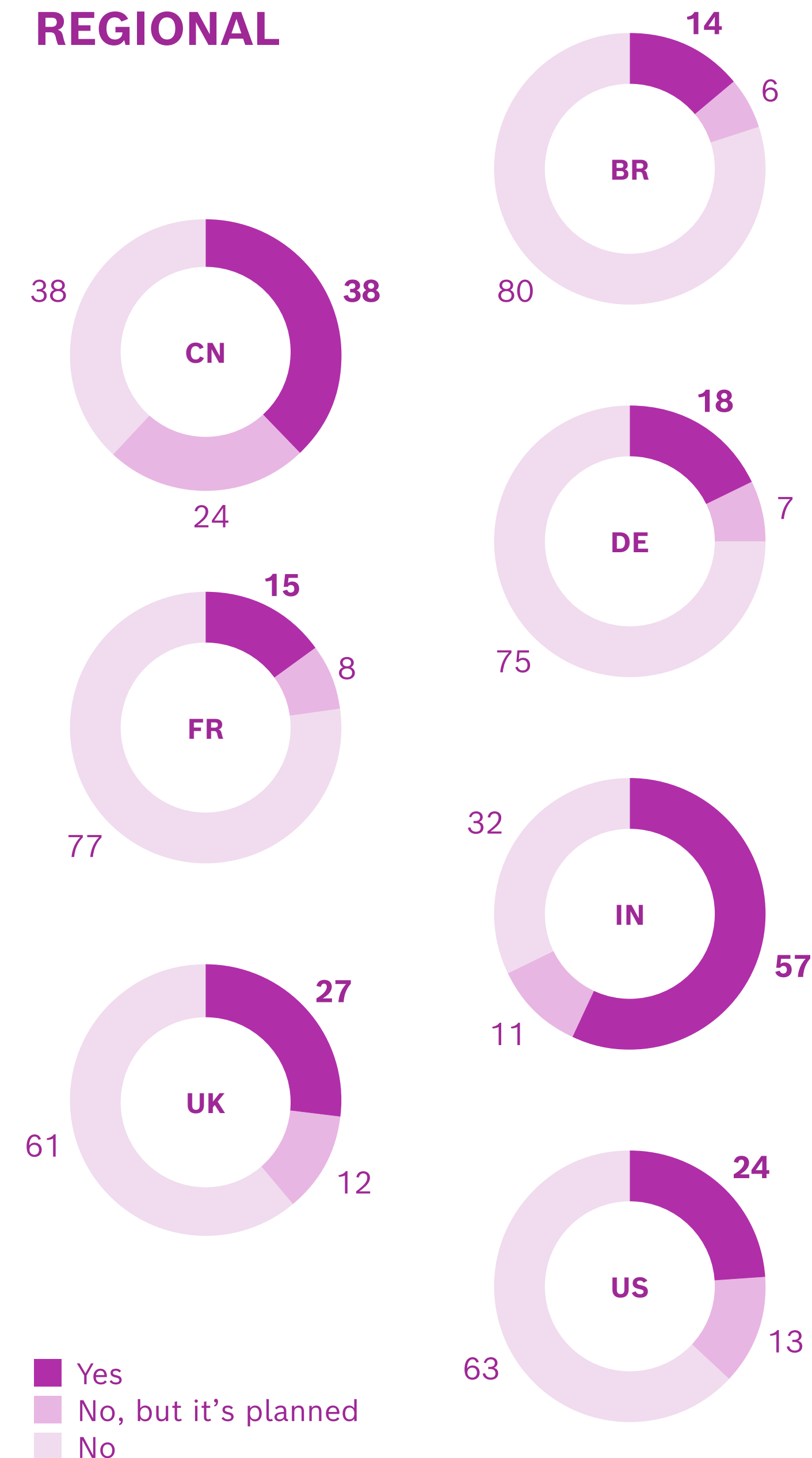
The regional disparity seen in other questions continues, with India (57%) and China (38%) recording high levels of people who have already received training. In contrast, the numbers are low for Brazil (14%) and France (15%) and not much higher for Germany (18%) and the US (24%).

GLOBAL INDEX



All Countries N=6851. BR N=1149, CN N=1819, DE N=471, FR N=382, IN N=1590, UK N=516, US N=924. Answers in %.

REGIONAL



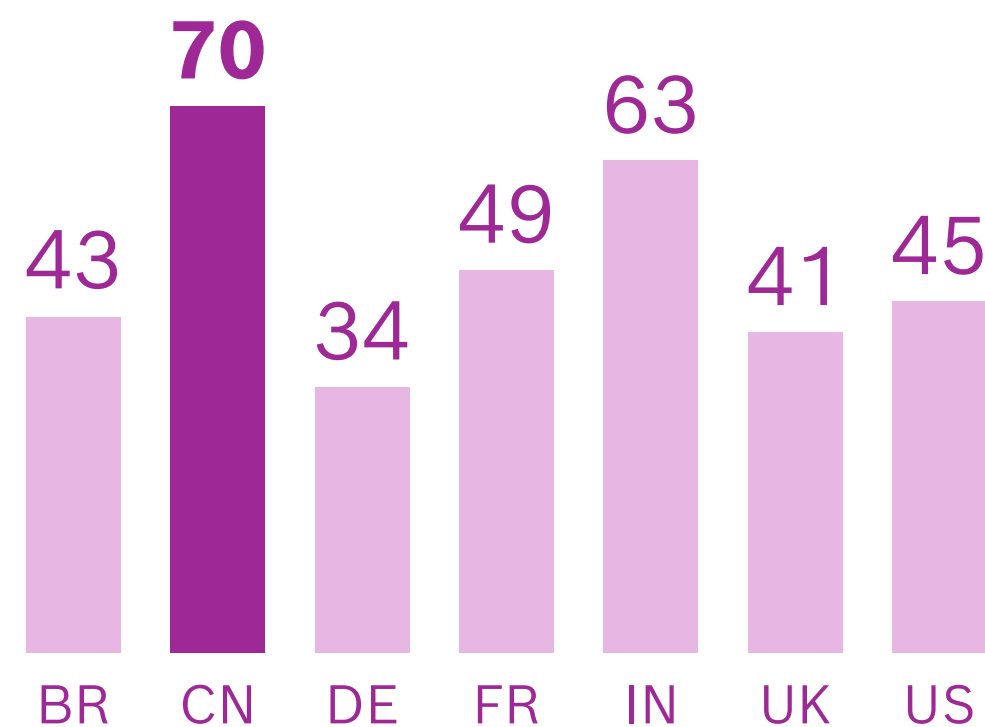
■ Yes
■ No, but it's planned
■ No

WHAT WILL AI MEAN FOR MY JOB?

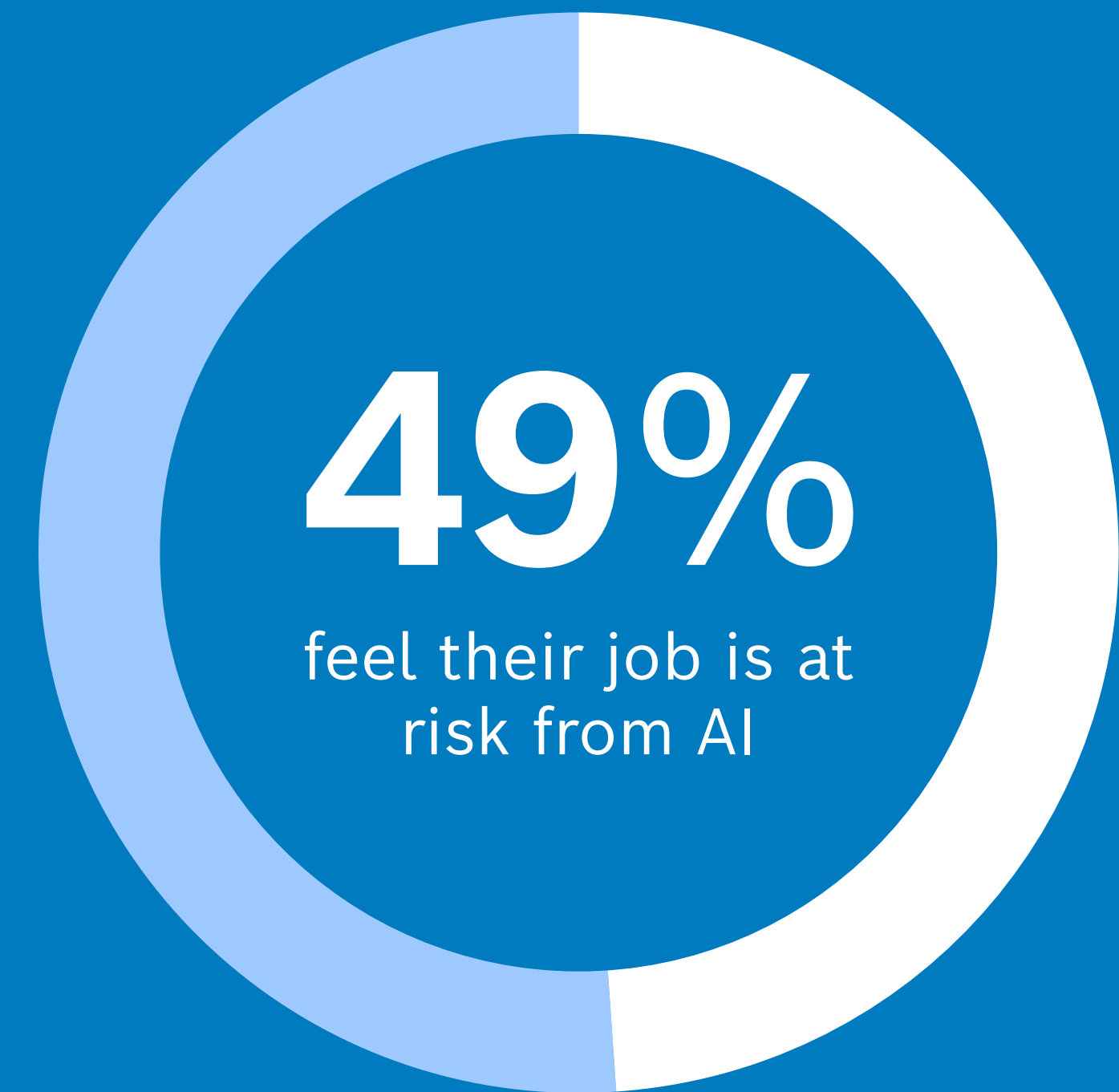
Do you see your job at risk from AI in the future?

REGIONAL

Overall the number of people feeling slightly or strongly at risk is high, with almost half of people falling into those two categories. In Germany more than a quarter don't feel any risk from AI, while in China only 6% agree.



BR N=1149, CN N=1819, DE N=471, FR N=382, IN N=1590, UK N=516, US N=924. Answers in %.



GLOBAL INDEX

Respondents are divided about the level of risk they face from AI when it comes to the security of their job. While 49% consider themselves to be slightly or strongly at risk, a similar 51% think they're probably not or not at all at risk.

Answers were scaled from 1 to 4. Top-2-Box Results. N=6851. Answers in %.

“AI SKILLS ARE NO LONGER LIMITED TO EXPERTS. WITH EDUCATION WE CAN HARNESS AI TO ENHANCE EVERYONE’S ABILITIES, VALIDATE AI OUTCOMES, AND ULTIMATELY IMPROVE HUMAN-MACHINE COLLABORATION.”

DR. STEFAN HARTUNG

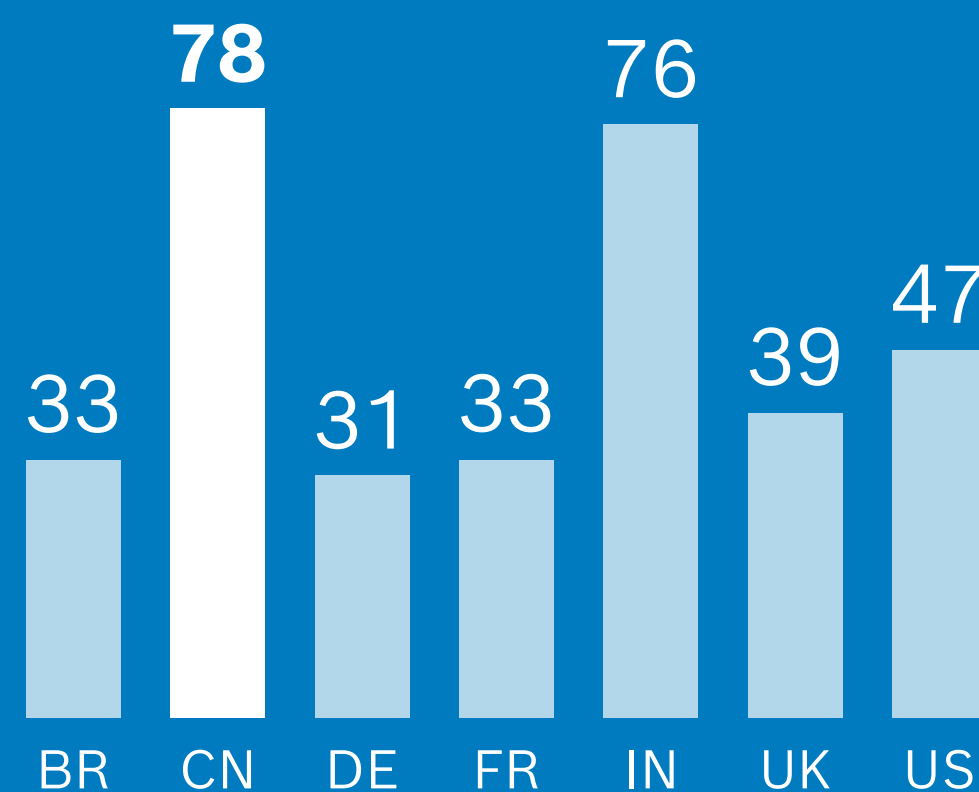
CHAIRMAN OF THE BOARD OF MANAGEMENT

PREPARING YOUNG PEOPLE

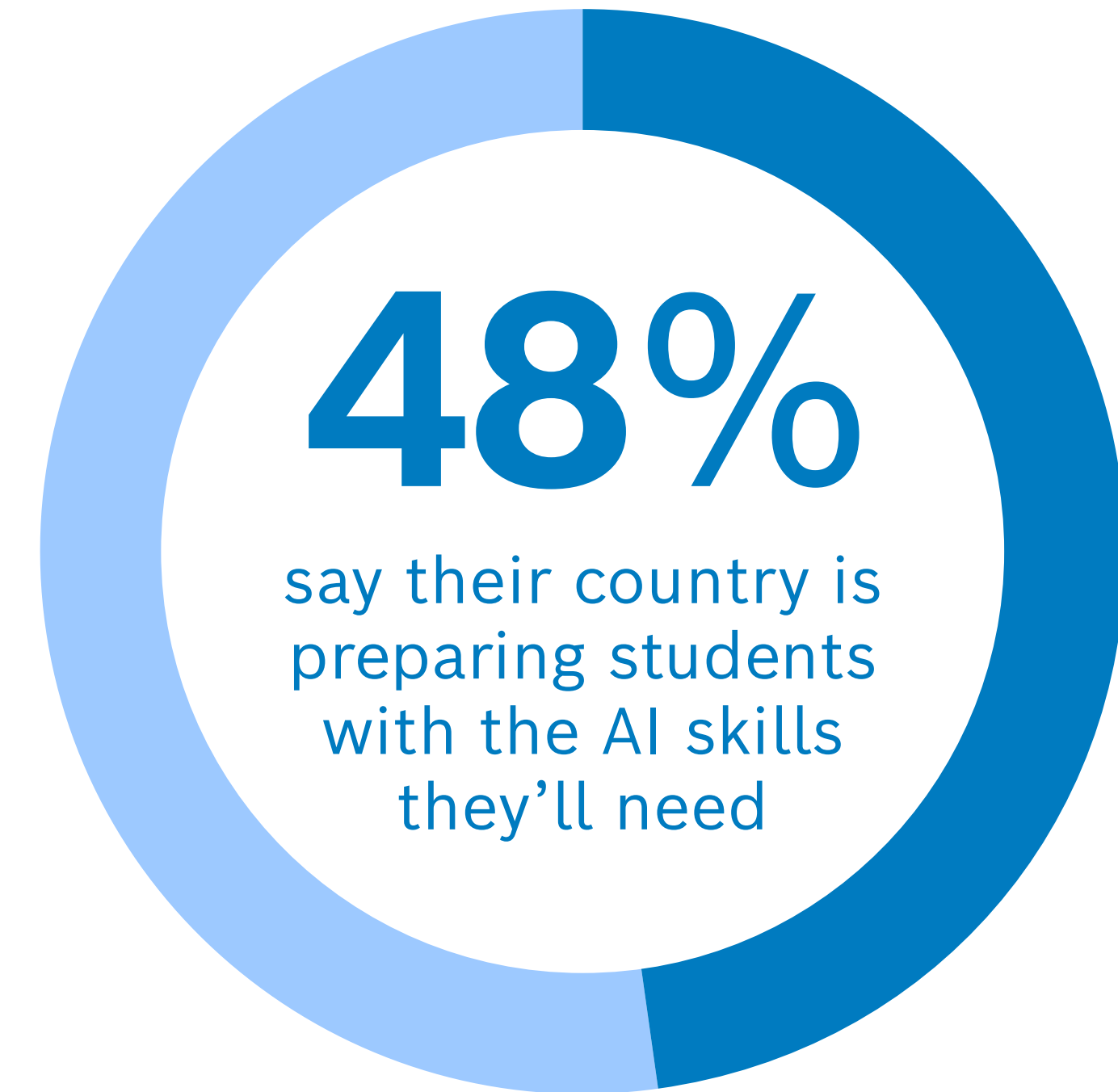
Do you think that educational institutions (e.g. schools, universities) in your country are adequately preparing students with AI skills for the future job market?

REGIONAL

A third of respondents from the European countries and Brazil feel young people are being equipped with the AI skills they'll need in the job market of the future. This climbs to 47% in the US and around three in four in China (78%) and India (76%).



BR N=2002, CN N=2004, DE N=1018, FR N=1002, IN N=2003, UK N=1000, US N=2001. Answers in %.



GLOBAL INDEX

Half of people (48%) feel educational institutions are doing enough to ensure students have the AI skills they'll need for the future job market.

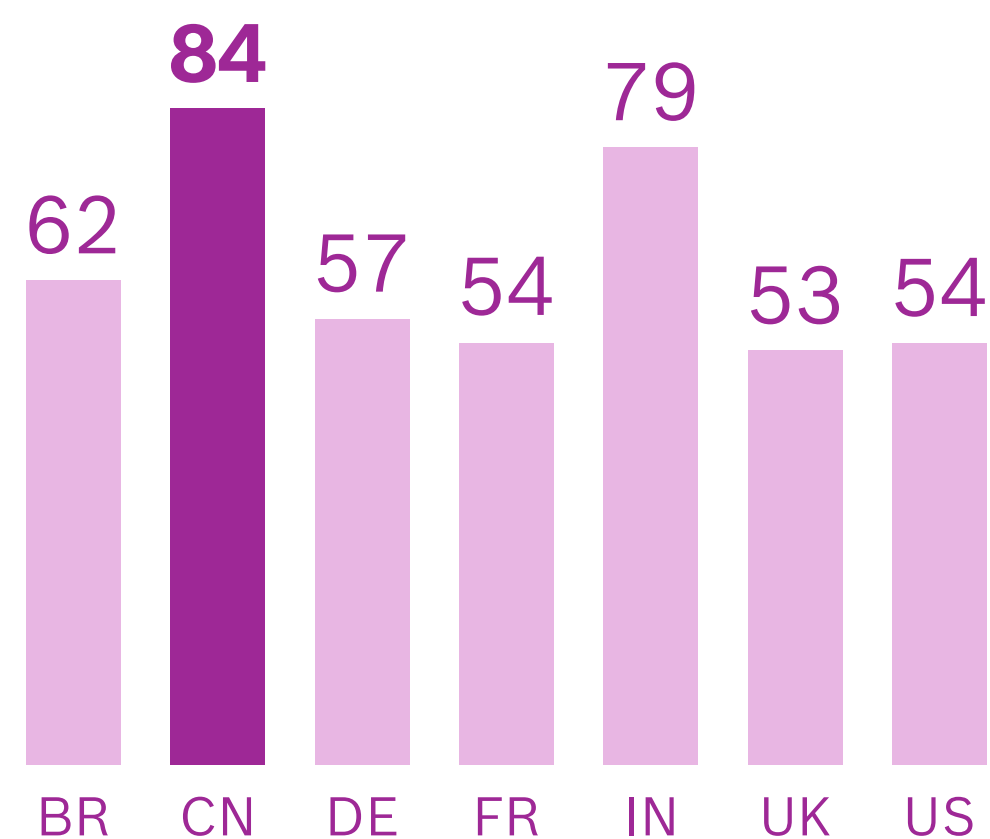
Answers were scaled from 1 to 4. Top-2-Box Results. N=11030. Answers in %.

SHOULD AI BE A SUBJECT AT SCHOOL?

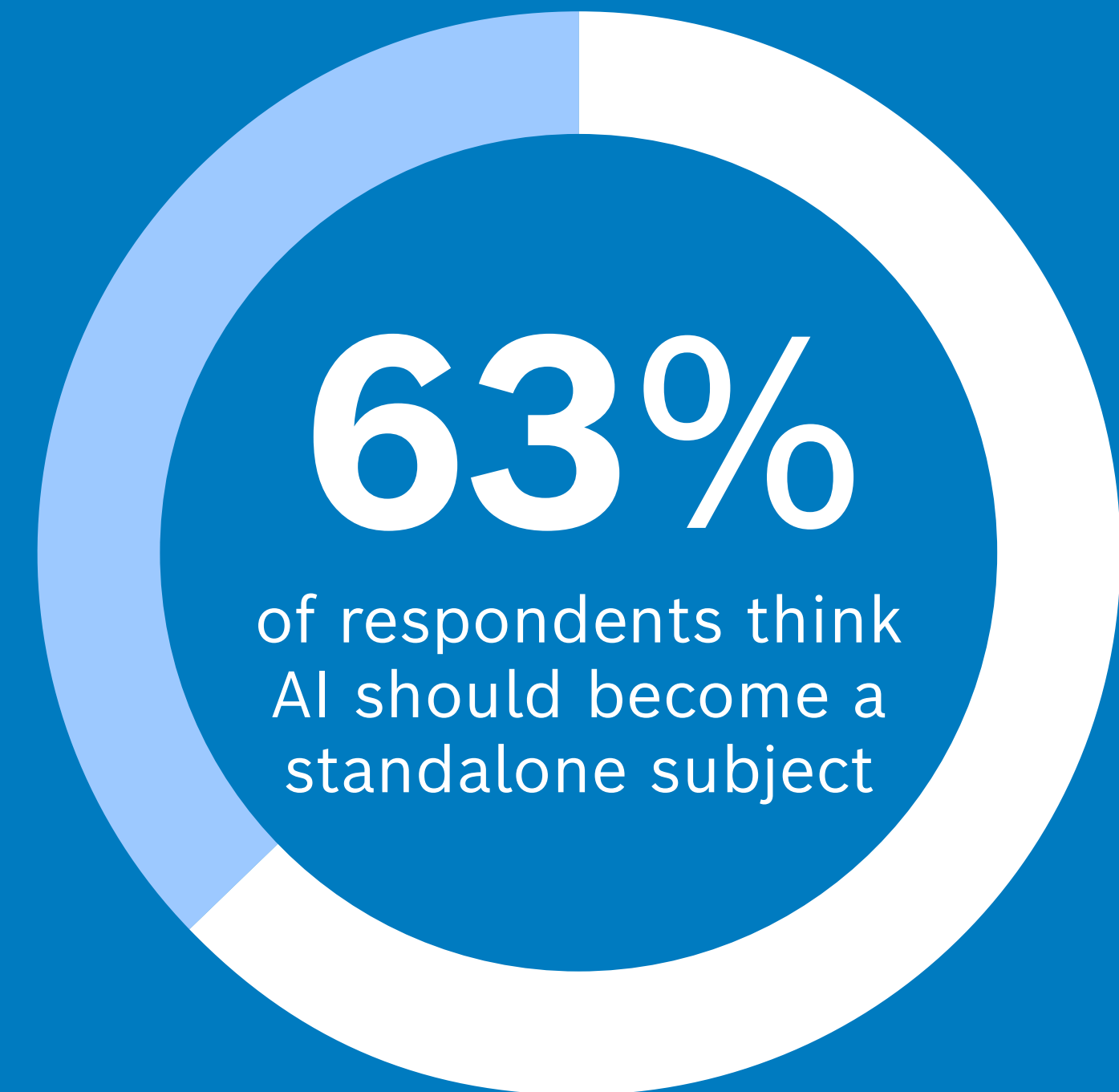
To what extent do you personally agree with the statement 'AI should become a standalone subject in schools'?

REGIONAL

For some regions the response is close to 50–50 but outside of the Western countries the percentage of people who agree with the statement that 'AI should become a standalone subject in schools' increases. In China it's as high as 84%.



BR N=2002, CN N=2004, DE N=1018, FR N=1002, IN N=2003, UK N=1000, US N=2001. Answers in %.



GLOBAL INDEX

Overall, almost two thirds of people across the world agree with the statement that AI should become a standalone subject in schools.

Answers were scaled from 1 to 4. Top-2-Box Results. N=11030. Answers in %.

WHICH REGIONS ARE READY?

Which regions do you think are particularly well equipped with AI skills?

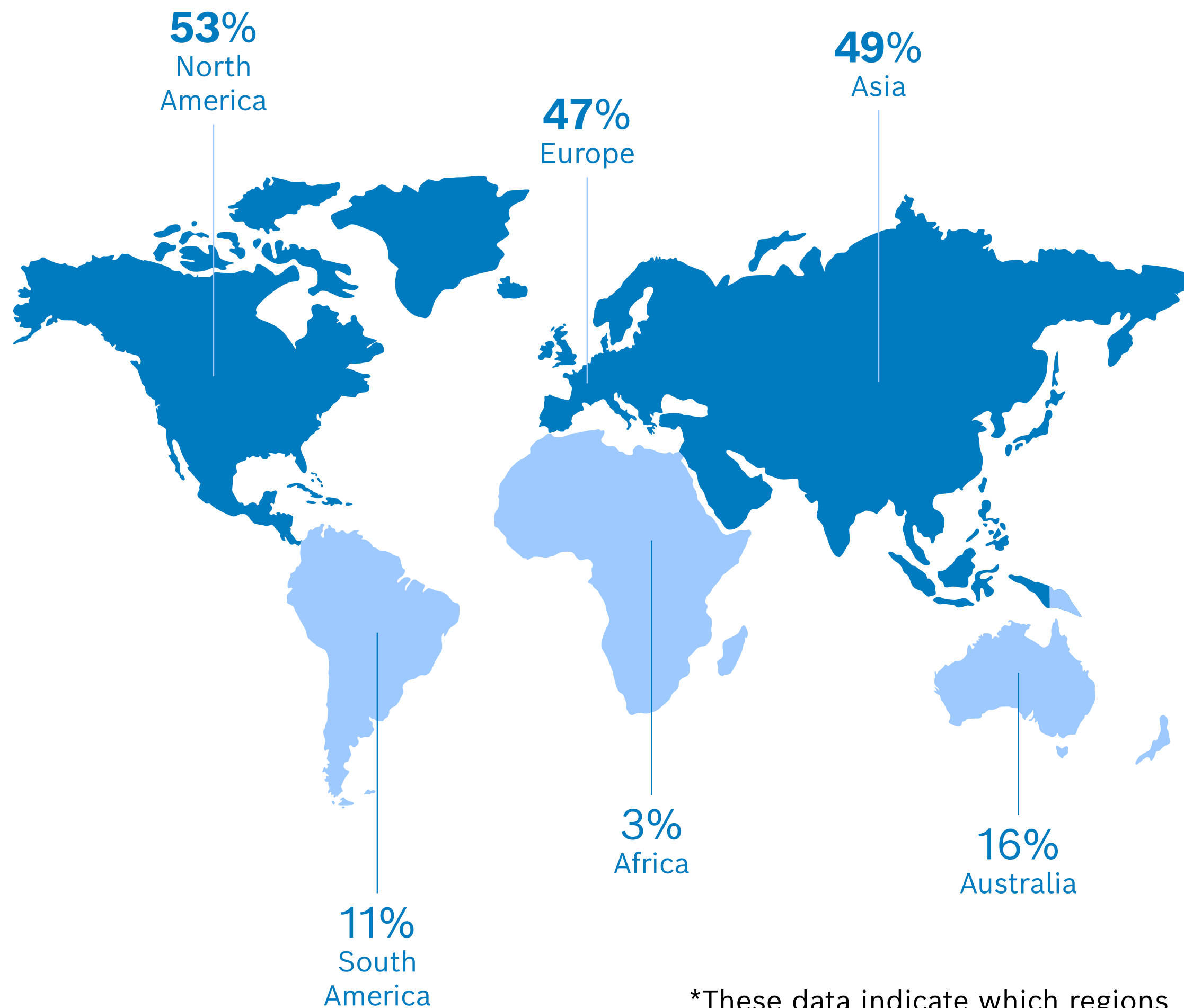
GLOBAL INDEX

It's clear that certain regions are seen as being ready for AI, with North America, Asia, and Europe comfortably ahead of Australia, South America, and Africa.

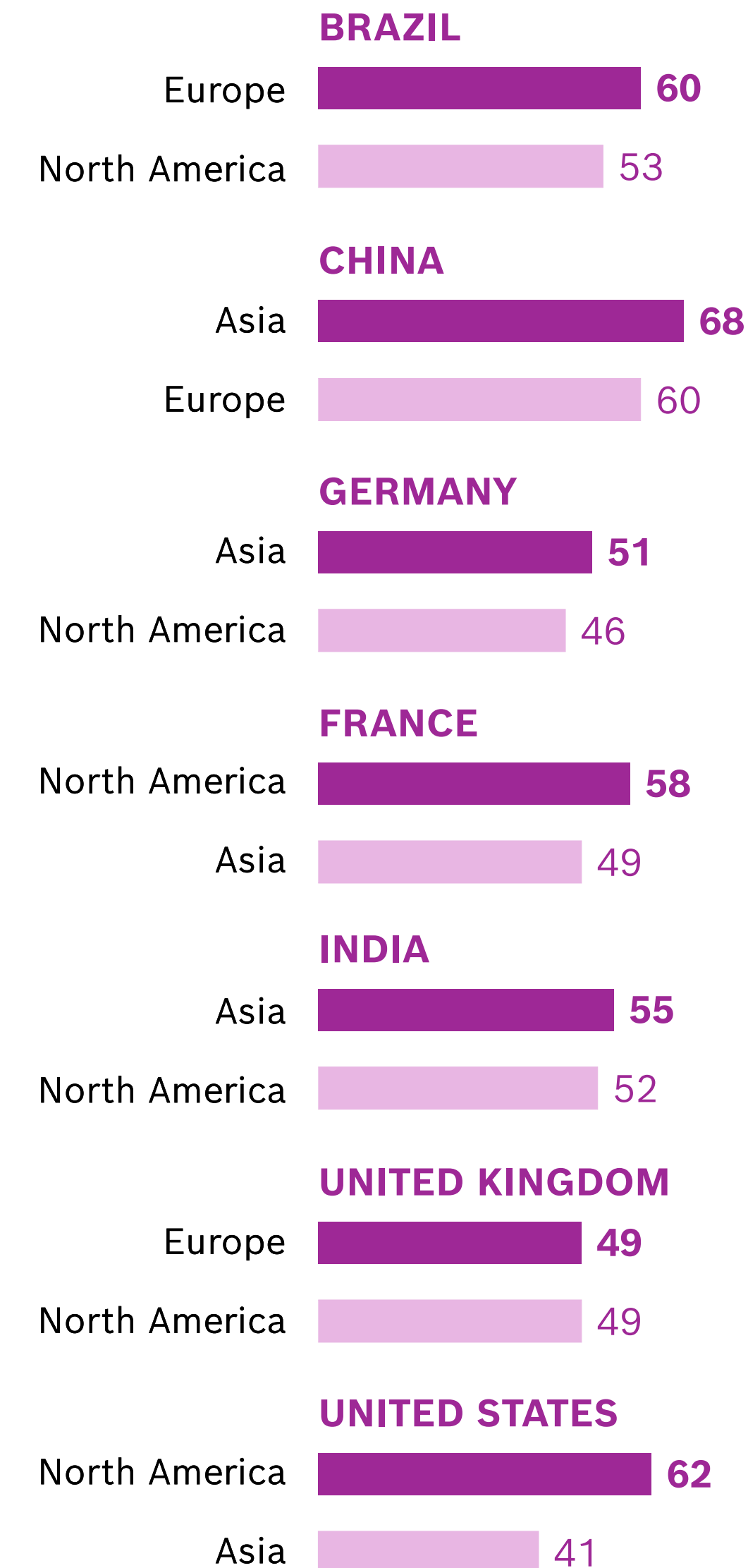
REGIONAL

European countries rated North America and Asia as highly as Europe, whereas the USA, China and India think their own territory is the best prepared. Brazil and the UK ranked Europe first, while China ranked Europe second.

GLOBAL INDEX



REGIONAL TOP TWO*



*These data indicate which regions the surveyed countries consider to be best equipped in terms of AI skills.

N = 11030. Answers in %.

BR N = 2002, CN N = 2004, DE N = 1018, FR N = 1002, IN N = 2003, UK N = 1000, US N = 2001. Answers in %.

WHERE TO DEPLOY AI?

In which of the following areas is it especially important for your country to have globally successful AI companies with a high level of knowledge in AI?

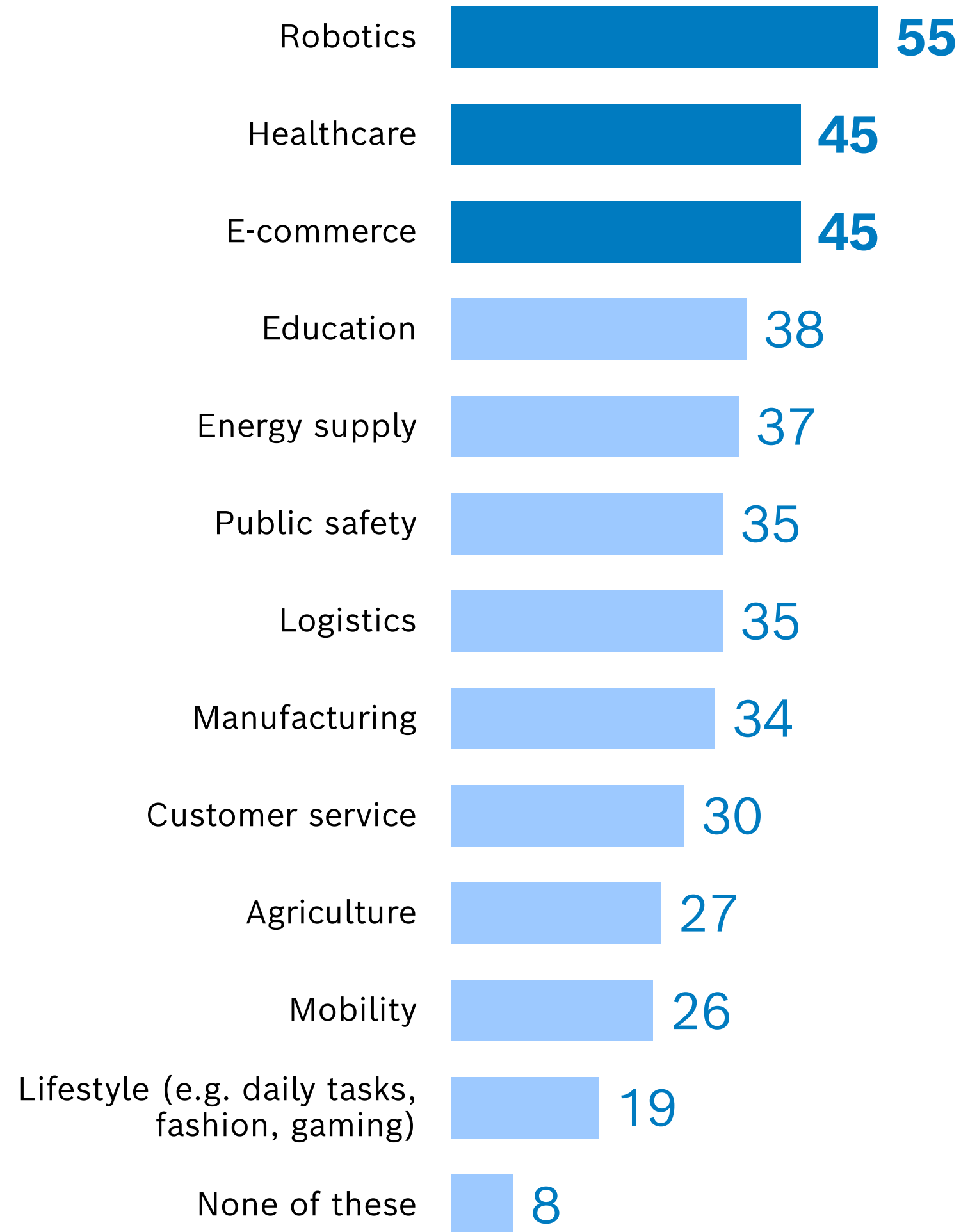
GLOBAL INDEX

By a comfortable margin robotics is the most important area in which companies should develop their AI competence. The second choice is held equally by healthcare and e-commerce.

REGIONAL

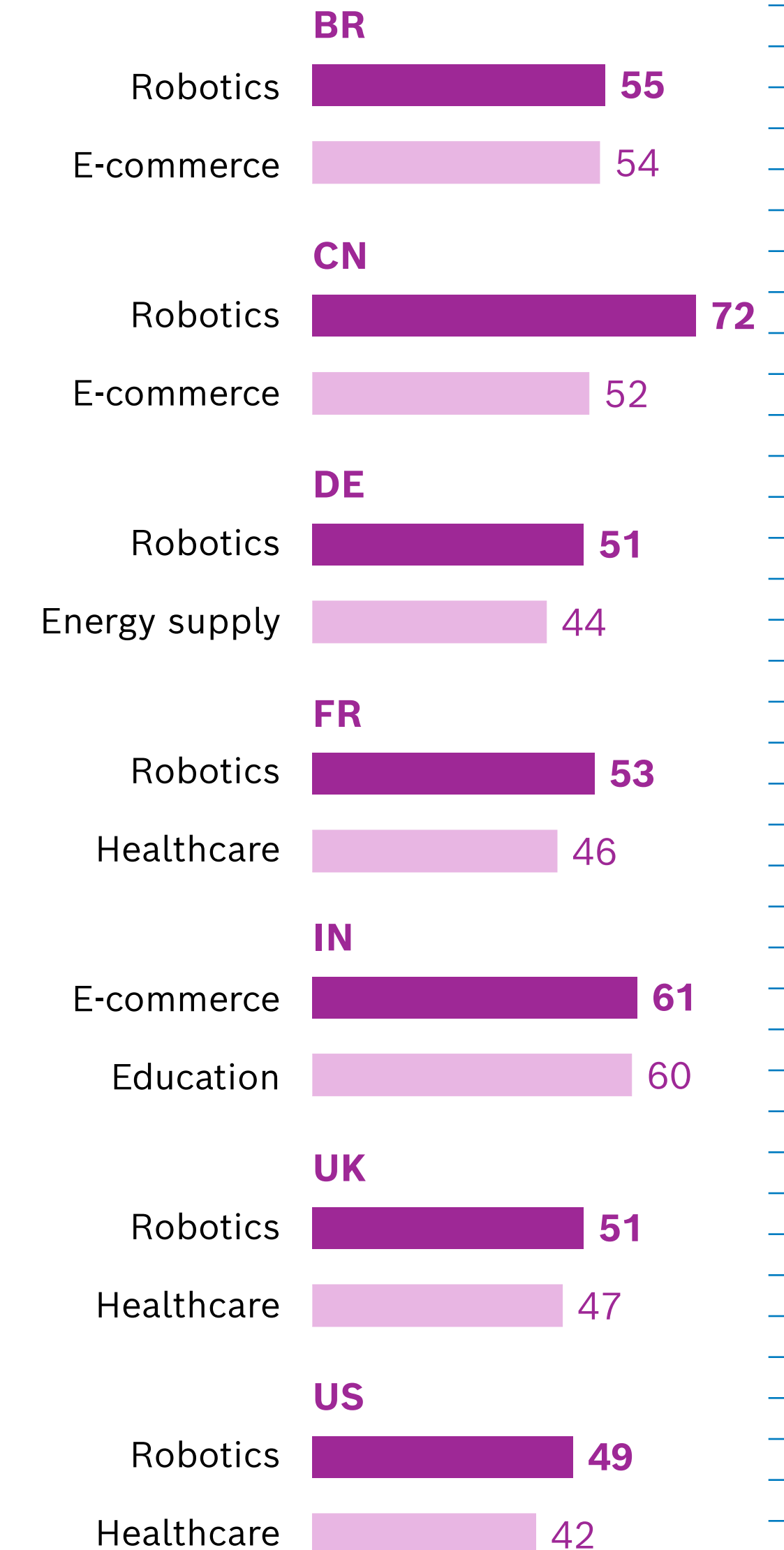
While six countries rank robotics top, India chose e-commerce as the most important area to develop AI with education second. It ranked robotics third.

GLOBAL INDEX



N = 11030. Answers in %.

REGIONAL TOP TWO



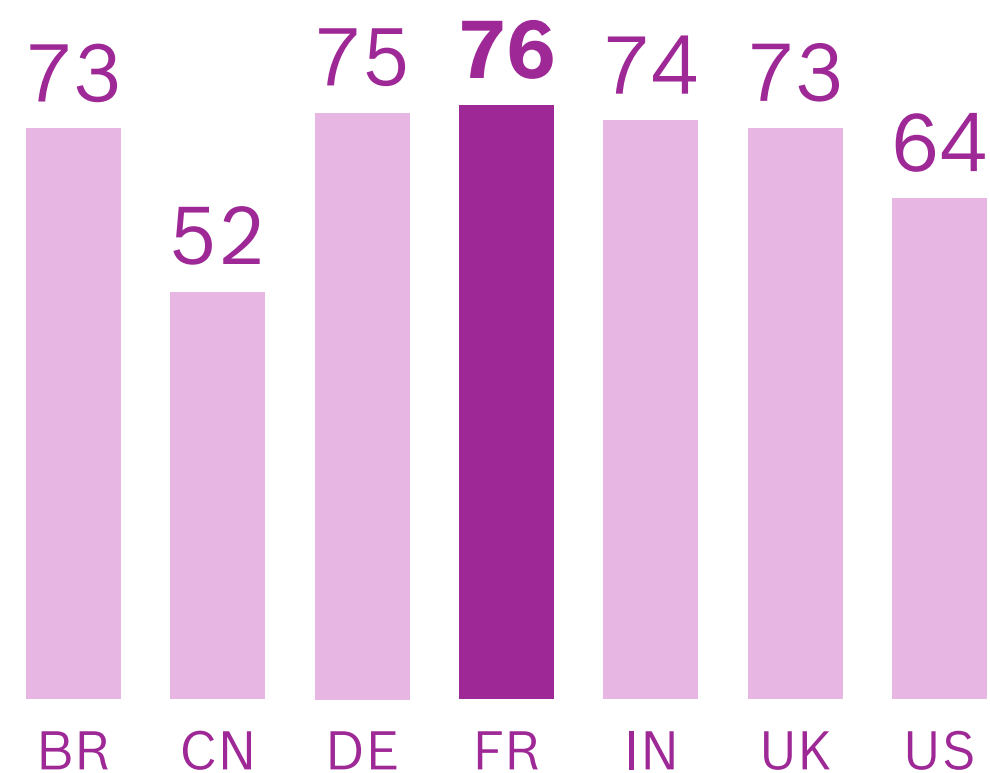
BR N=2002, CN N=2004, DE N=1018, FR N=1002, IN N=2003, UK N=1000, US N=2001. Answers in %.

WILL AI GENERATE INEQUALITY?

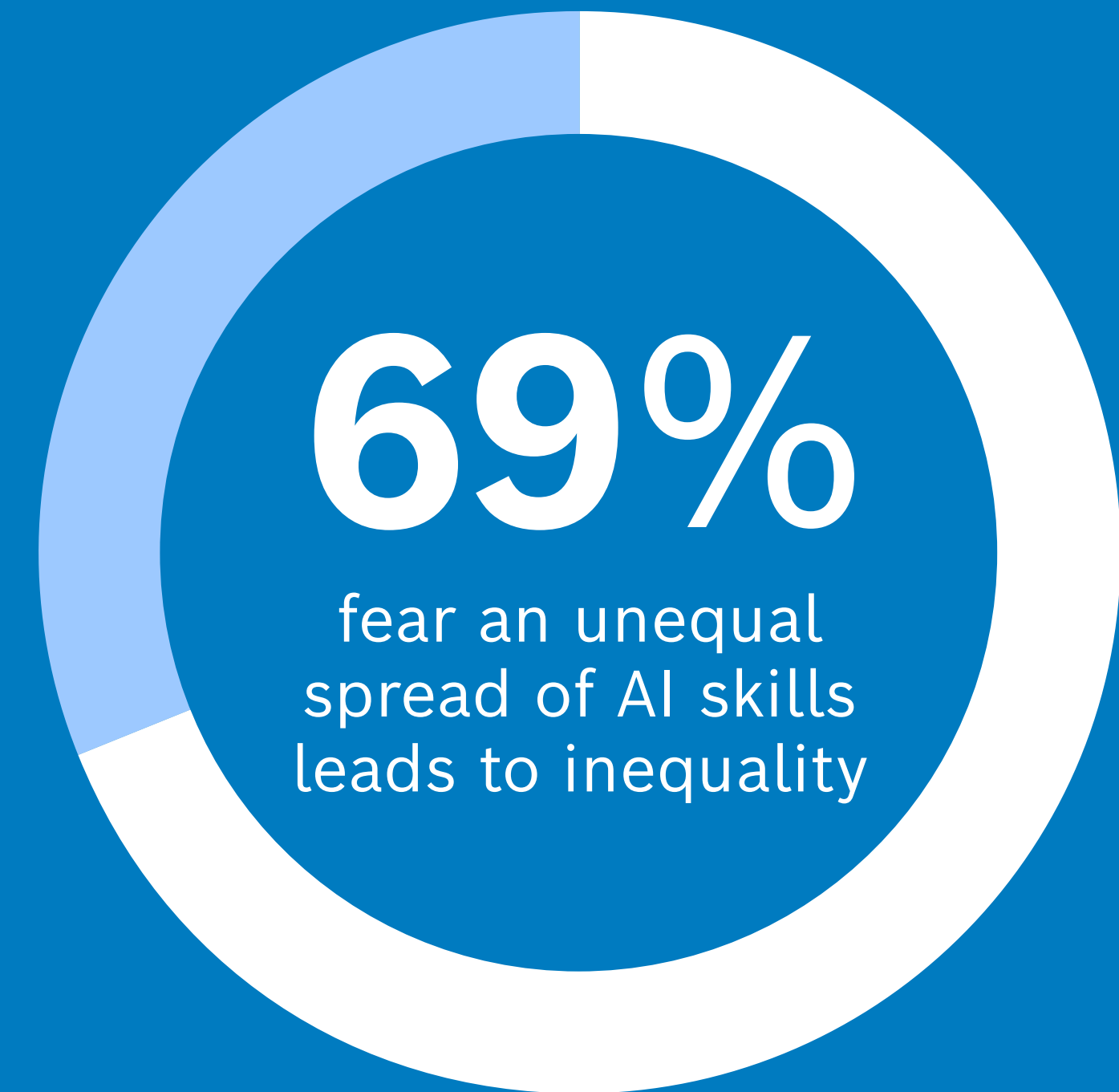
Does an unequal distribution of AI skills intensify social inequality?

REGIONAL

In five of the countries surveyed, three in four people agree with the statement. The USA (64%) and China (52%) record slightly lower figures.



BR N=2002, CN N=2004, DE N=1018, FR N=1002, IN N=2003, UK N=1000, US N=2001. Answers in %.



GLOBAL INDEX

Almost every country concludes that AI skills need to be distributed equally among society otherwise it could contribute to an increase in inequality.

Answers were scaled from 1 to 4. Top-2-Box Results. N=11030. Answers in %.

ATTITUDES TOWARDS TECH



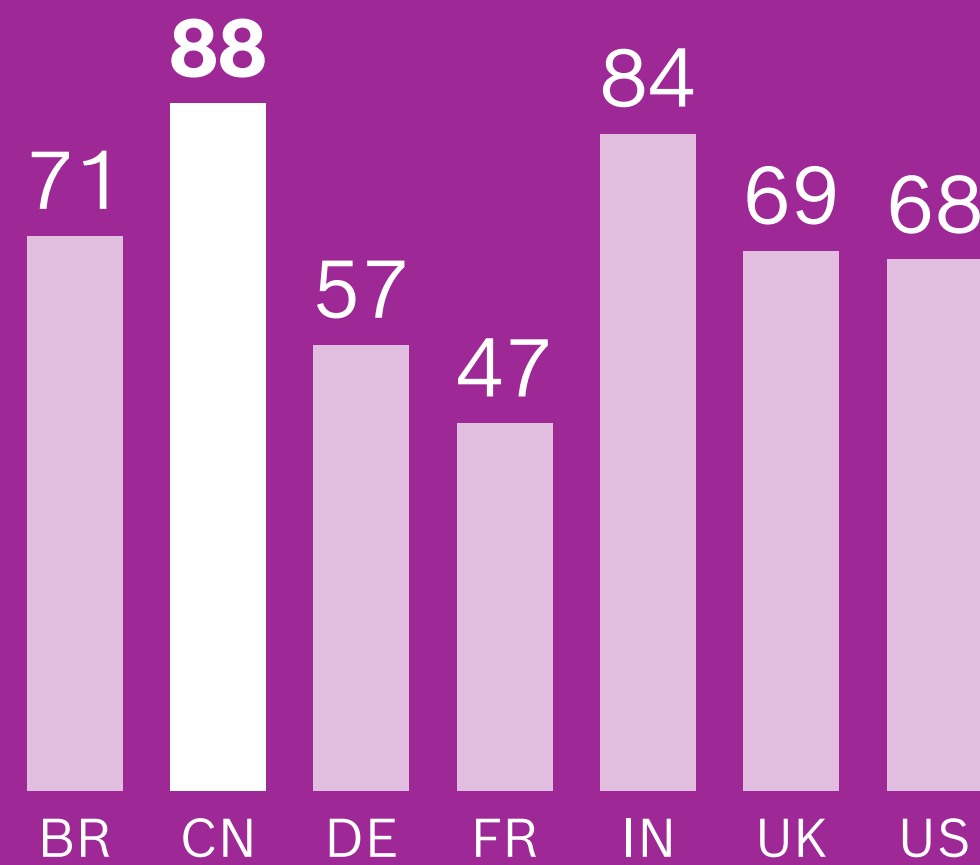
AI-generated image

THE POSITIVES OF TECH

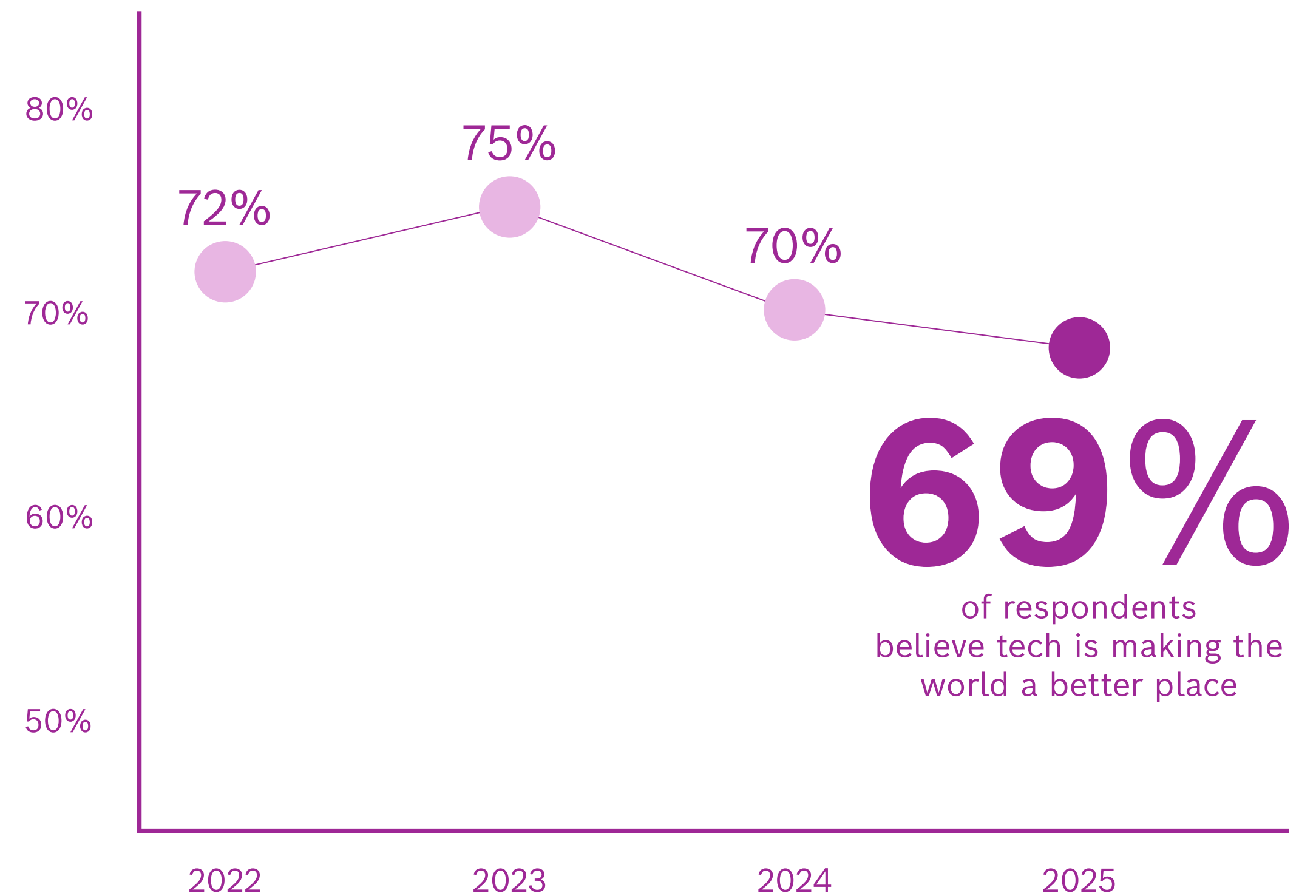
To what extent do you personally agree with the statement 'Technological progress makes the world a better place'?

REGIONAL

Some countries feel more positive about technology and its impact on making the world a better place. China (88%) and India (84%) strongly agree, with Brazil (71%) and the UK (69%) not far behind. The figures for Germany (57%) and France (47%) are lower.



BR N=2002, CN N=2004, DE N=1018, FR N=1002, IN N=2003, UK N=1000, US N=2001. Answers in %.



GLOBAL INDEX

Fewer people agree with the statement from year to year, with the 2025 figure (69%) being the lowest recorded from the four Tech Compass surveys to date. Compared to last year only India (82% to 84%) and the UK (67% to 69%) have a greater percentage of people agreeing with the statement.

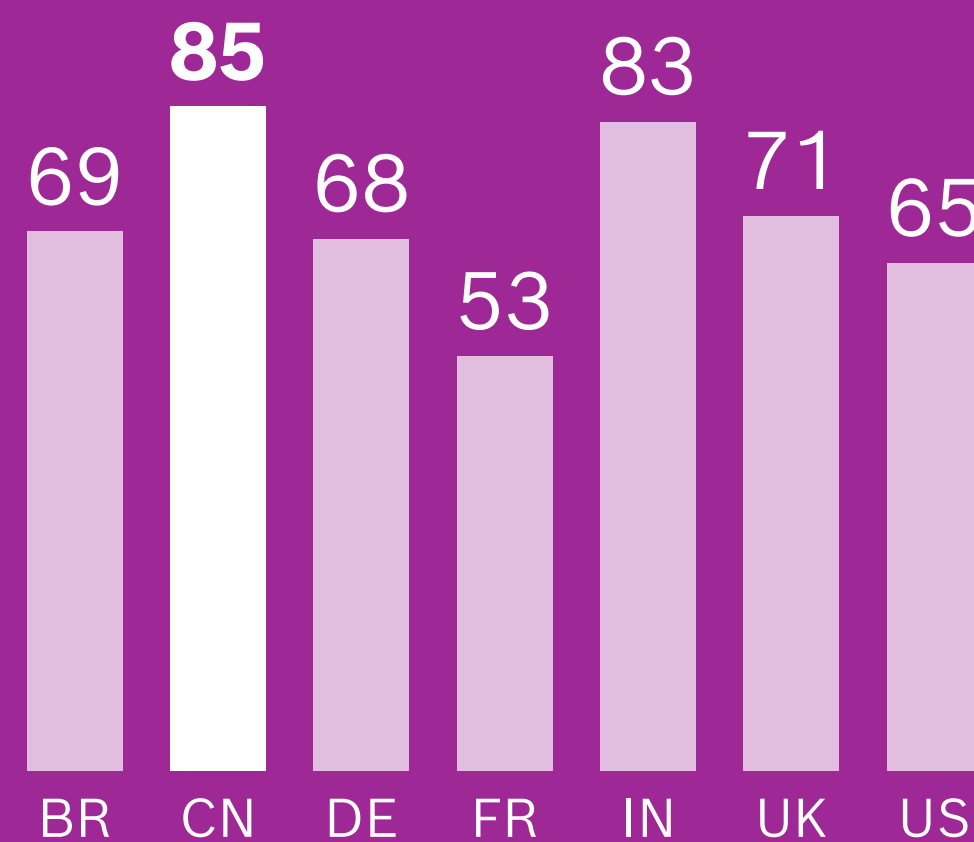
Answers were scaled from 1 to 4. Top-2-Box Results. 2025 N=11030, 2024 N=11264, 2023 N=11179, 2022 N=8076. Answers in %.

COMBATING CLIMATE CHANGE?

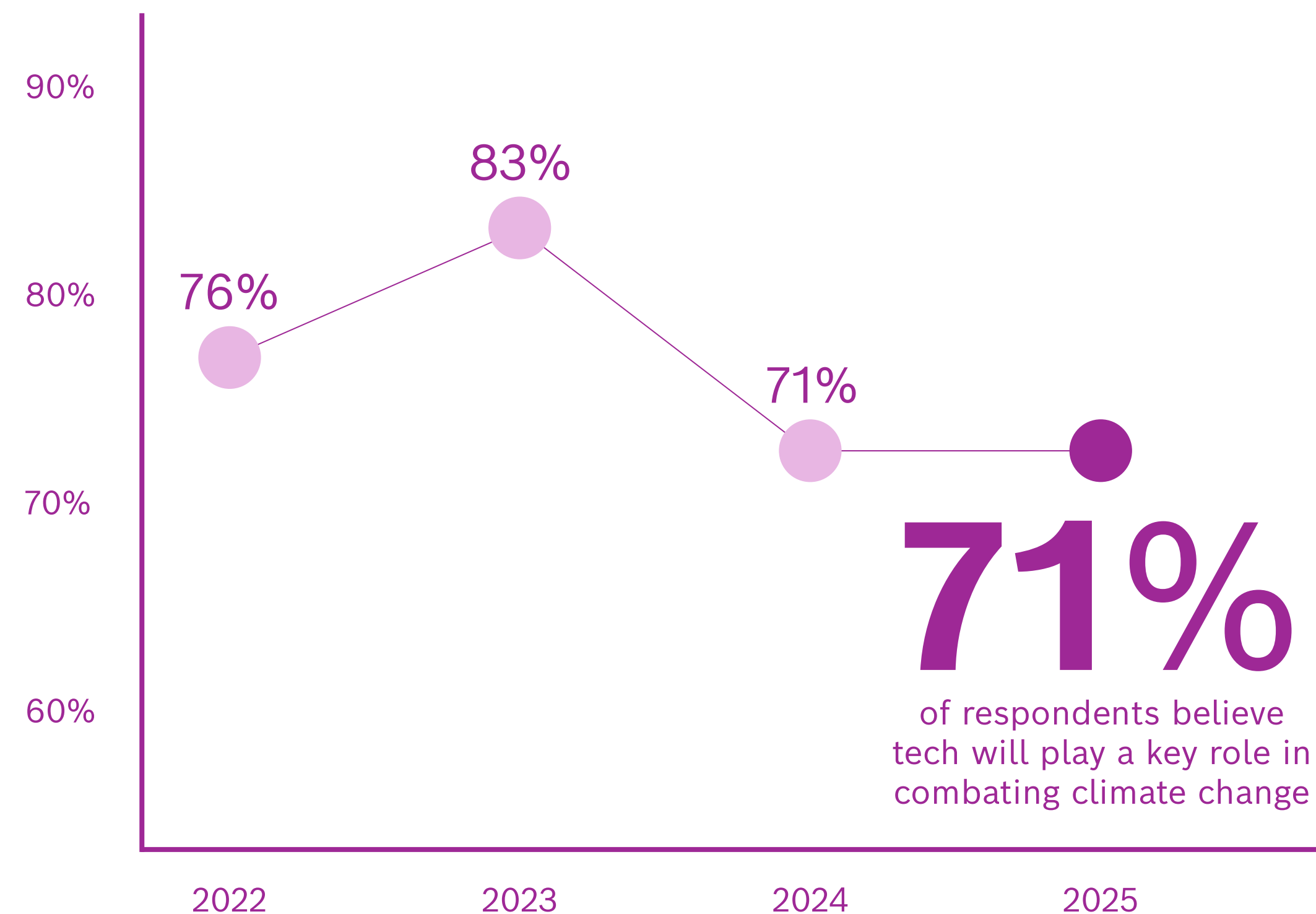
To what extent do you personally agree with the statement 'Future technological progress will play the key role in combating climate change'?

REGIONAL

There is a wide variation in the responses to this statement. France is not optimistic, with 53% agreeing. Most countries record notably higher positive responses, with China top with 85%, closely followed by India with 83%.



BR N=2002, CN N=2004, DE N=1018, FR N=1002, IN N=2003, UK N=1000, US N=2001. Answers in %.



GLOBAL INDEX

Overall the percentage of people that agree with the statement is 71%, which aligns with the 2024 figure. After a surge of optimism in 2023, the number has dropped back. Most countries record minor changes compared to last year, with France falling the most (59% to 53%).

Answers were scaled from 1 to 4. Top-2-Box Results. 2025 N=11030, 2024 N=11264, 2023 N=11179, 2022 N=8076. Answers in %.

THE FUTURE OF TECH



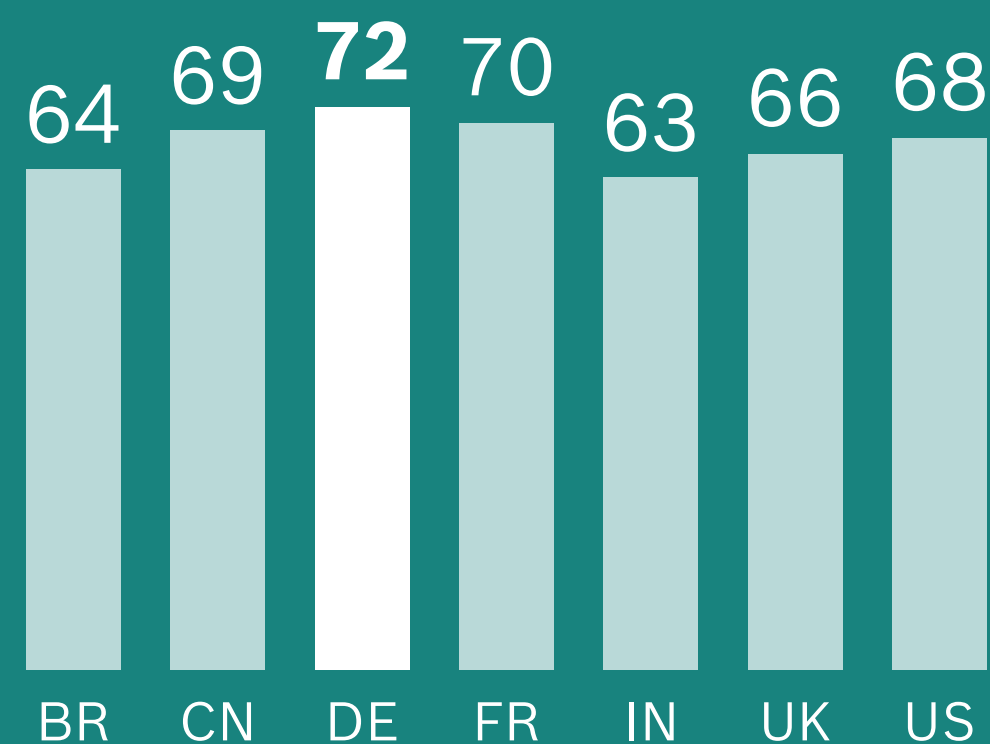
FUTURE AI INFLUENCE?

Which of these technologies will be the most influential in your country in 10 years?*

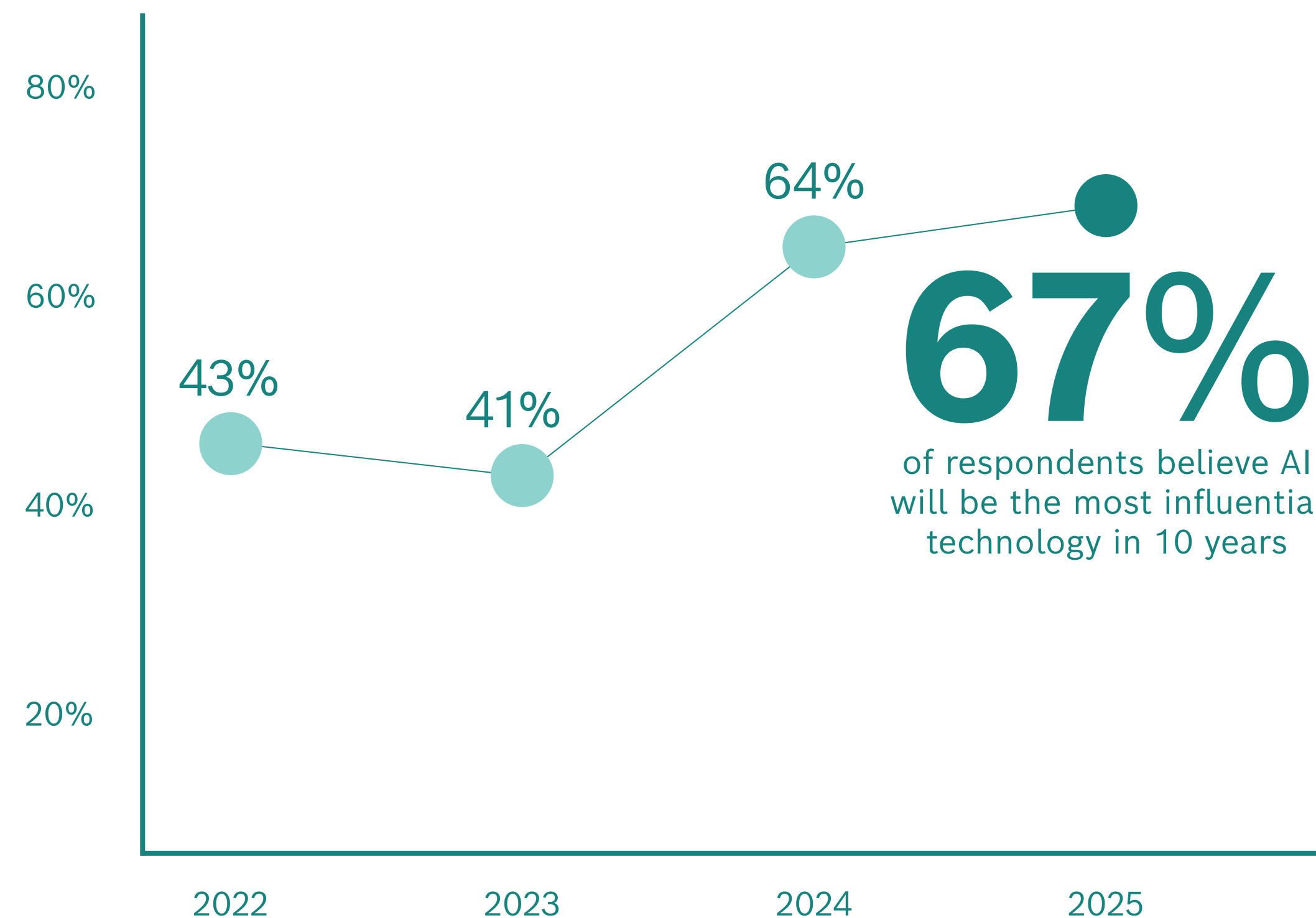
*This page only shows the results for AI. The results for other technologies can be found on page 25.

REGIONAL

There is strong consensus in all seven countries that AI is likely the most influential technology in the next 10 years.



BR N=1916, CN N=1983, DE N=991, FR N=968, IN N=1932, UK N=978, US N=1862. Answers in %.



GLOBAL INDEX

Over the past four years there has been a significant change in the percentage of people who believe AI will be important in the coming decade. It has gone from the low 40% mark to 64% last year and now 67%.

The reported values are based on respondents that know the respective technology. 2025 N=10629, 2024 N=10763, 2023 N=10451, 2022 N=7604. Answers in %.

TECH OF THE FUTURE?

Which of these technologies will be the most influential in your country in 10 years?

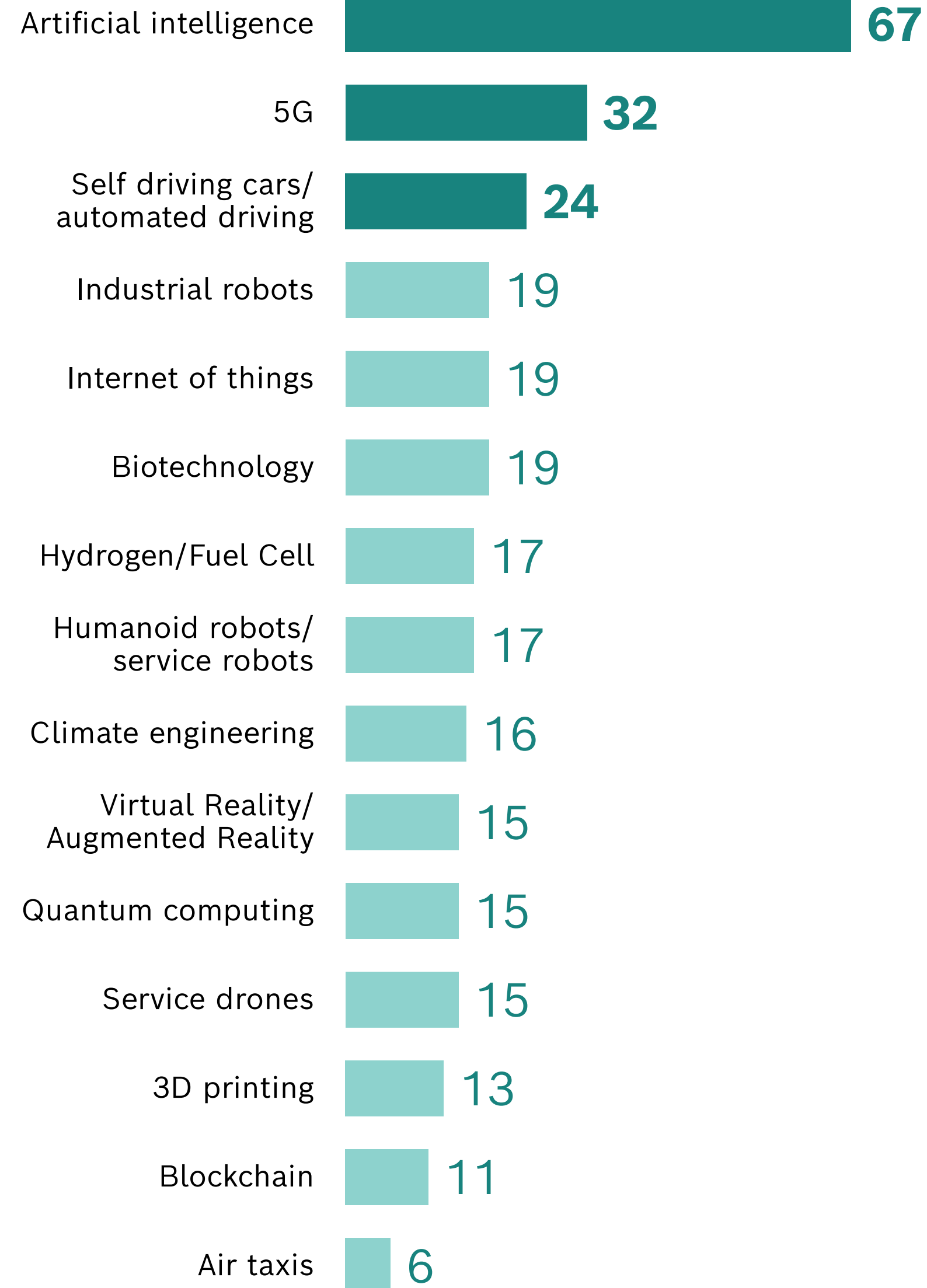
GLOBAL INDEX

AI is markedly ahead of 5G (32%), which is the technology ranked in second place. Few people believe flying taxis will take off: Its global average is just 6%.

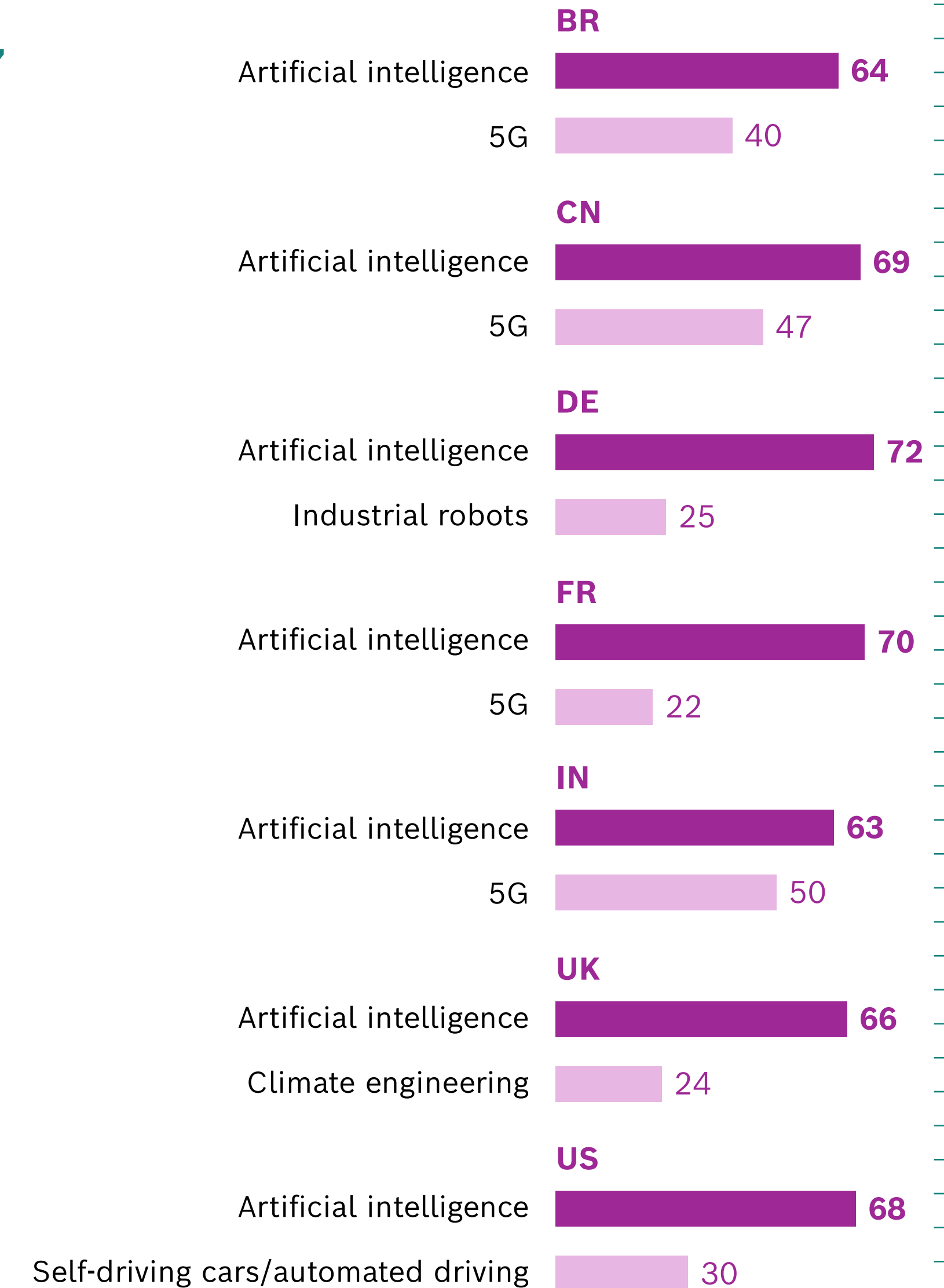
REGIONAL

In the USA self-driving cars/automated driving ranks in second place. In the UK it was third but only fractionally behind climate engineering. A notably high number of respondents from Brazil selected service drones (23%).

GLOBAL INDEX



REGIONAL TOP TWO



The reported values are based on respondents that know the respective technology. All Countries N=6258-10700. BR N=755-1964, CN N=1044-1983, DE N=470-991, FR N=350-973, IN N=1532-1954, UK N=467-978, US N=754-1909. Answers in %.



HOPES AND FEARS

POSITIVE IMPACT ON SOCIETY

Which of these technologies do you think will make a particularly positive contribution to society?

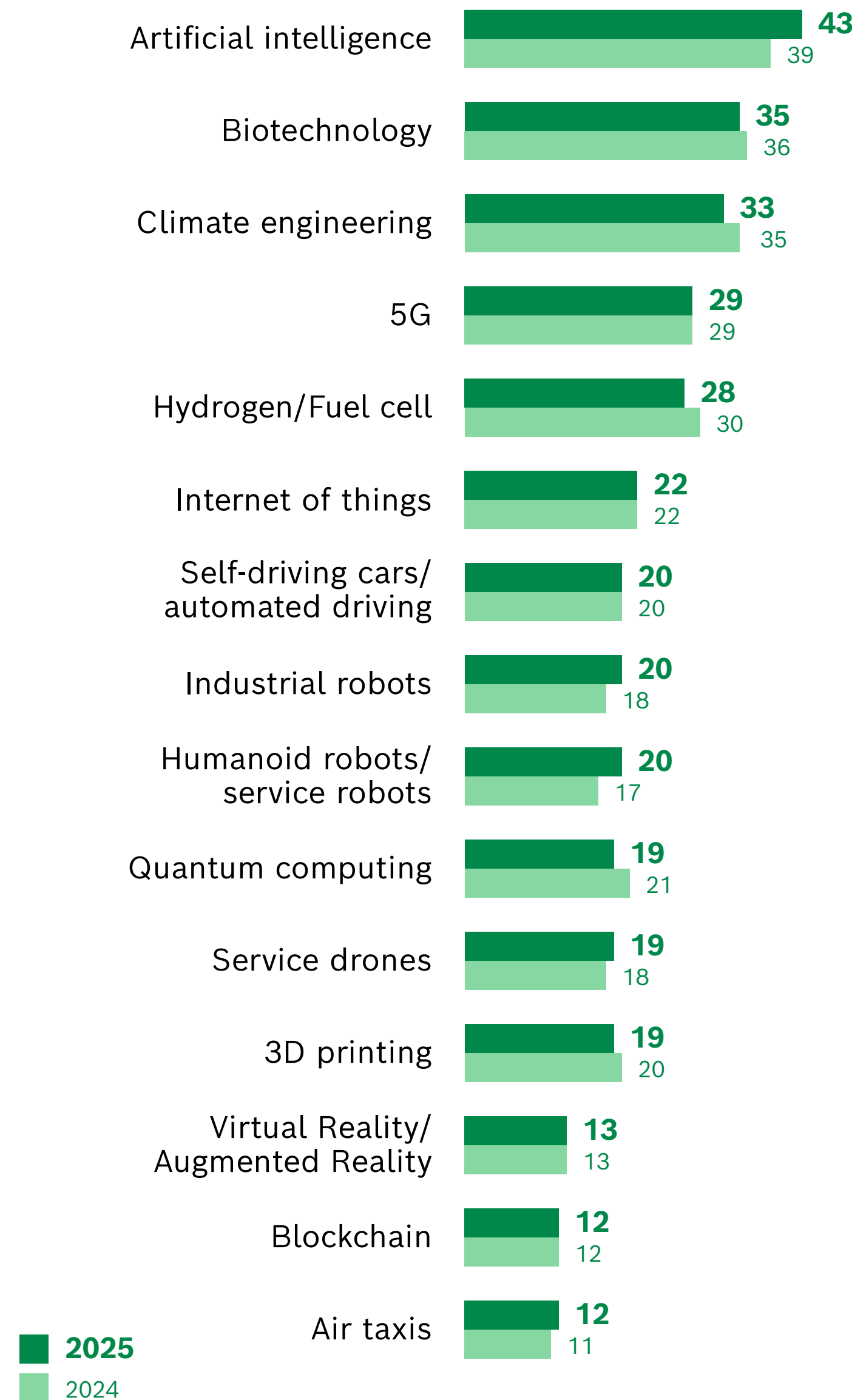
GLOBAL INDEX

Many of the technologies ranked highly in previous years have fallen back slightly, such as biotechnology, climate engineering and hydrogen/fuel cells, while AI has been able to make further gains from an already high level. Quantum computing is also seen as not as relevant as it was in previous years.

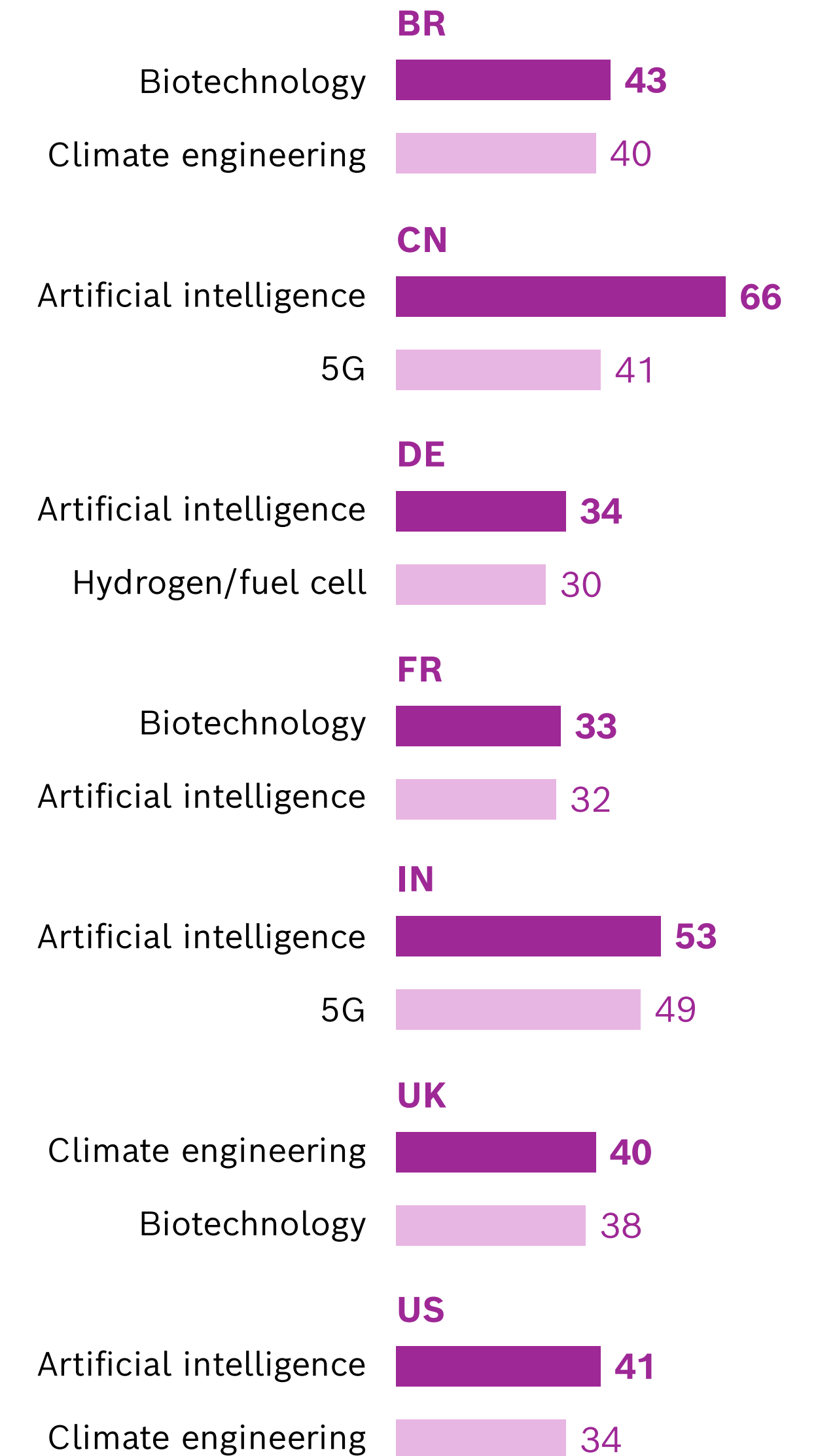
REGIONAL

The potential of AI to positively impact society is highlighted in this question, with many countries ranking it first by a large margin. There's disparity in the second most popular selections, with climate and biotechnology engineering featuring significantly. Germany ranks hydrogen/fuel cells in second place.

GLOBAL INDEX



REGIONAL TOP TWO



The reported values are based on respondents that know the respective technology. 2025 N=6258-10700, 2024 N=5858-10838. BR N=755-1964, CN N=1044-1983, DE N=470-991, FR N=350-973, IN N=1532-1954, UK N=467-978, US N=754-1909. Answers in %.

NEGATIVE IMPACT ON SOCIETY

Which of these technologies do you think are the biggest threat to society?

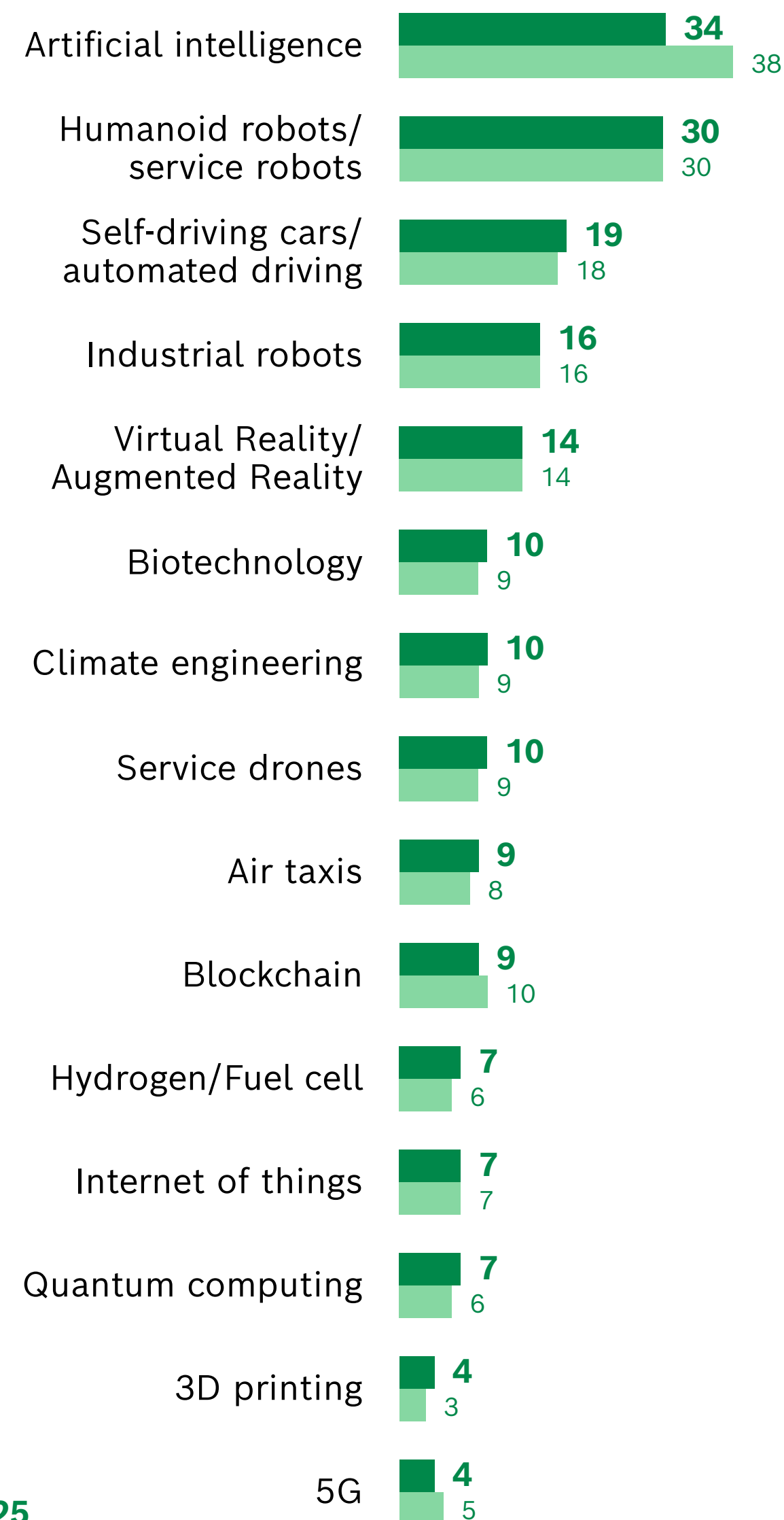
GLOBAL INDEX

Although it remains at the top of the list, the global average that selected AI has fallen from 38% in 2024 to 34% in 2025. Most other results remain the same, with humanoid robots/service robots remaining in second position.

REGIONAL

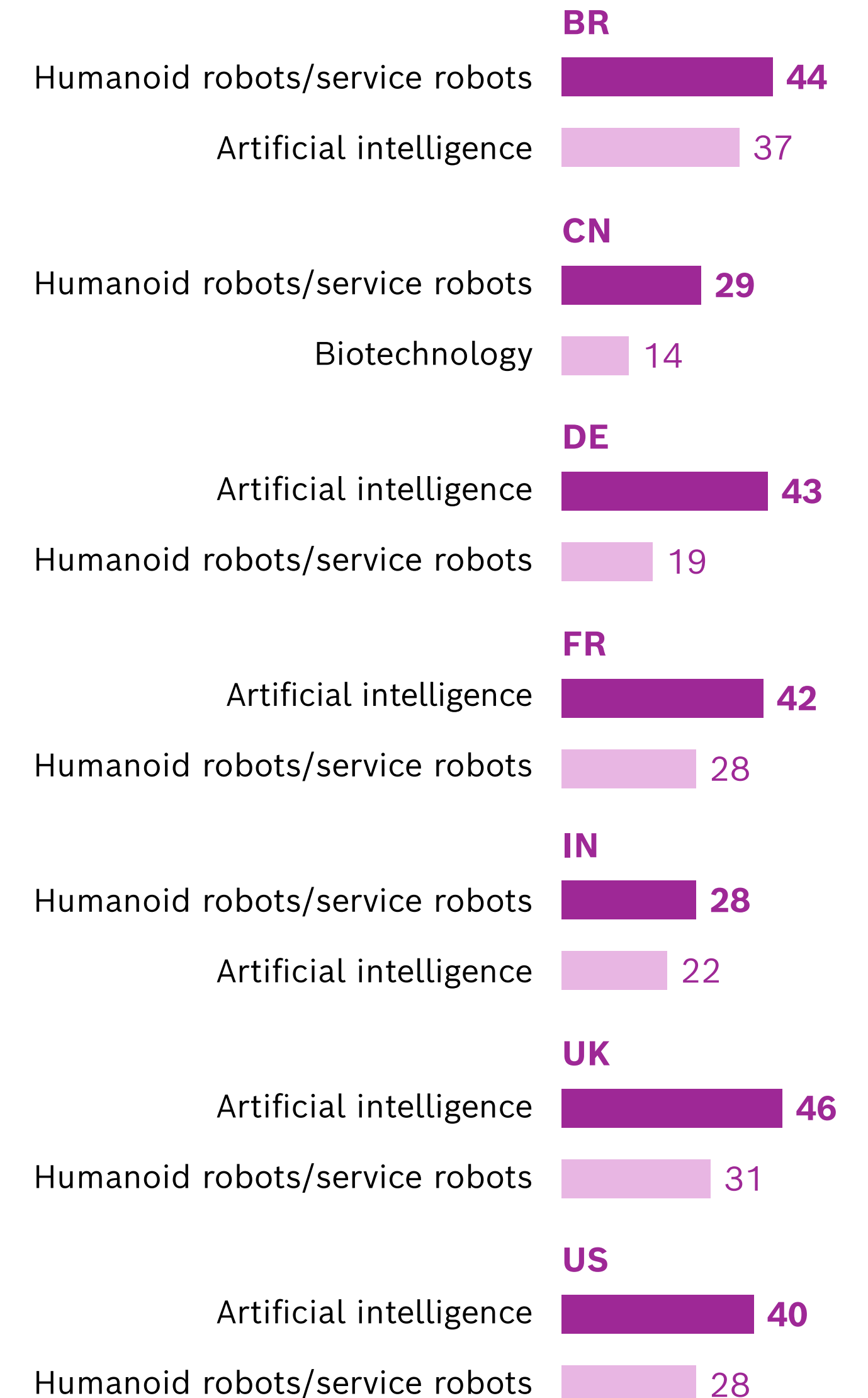
Humanoid robots/service robots are in the top two of each of the seven countries. Brazil ranked industrial robots notably higher than any other country.

GLOBAL INDEX



■ 2025
■ 2024

REGIONAL TOP TWO



The reported values are based on respondents that know the respective technology. 2025 N=6258-10700, 2024 N=5858-10838. BR N=755-1964, CN N=1044-1983, DE N=470-991, FR N=350-973, IN N=1532-1954, UK N=467-978, US N=754-1909. Answers in %.

WHAT IF...?

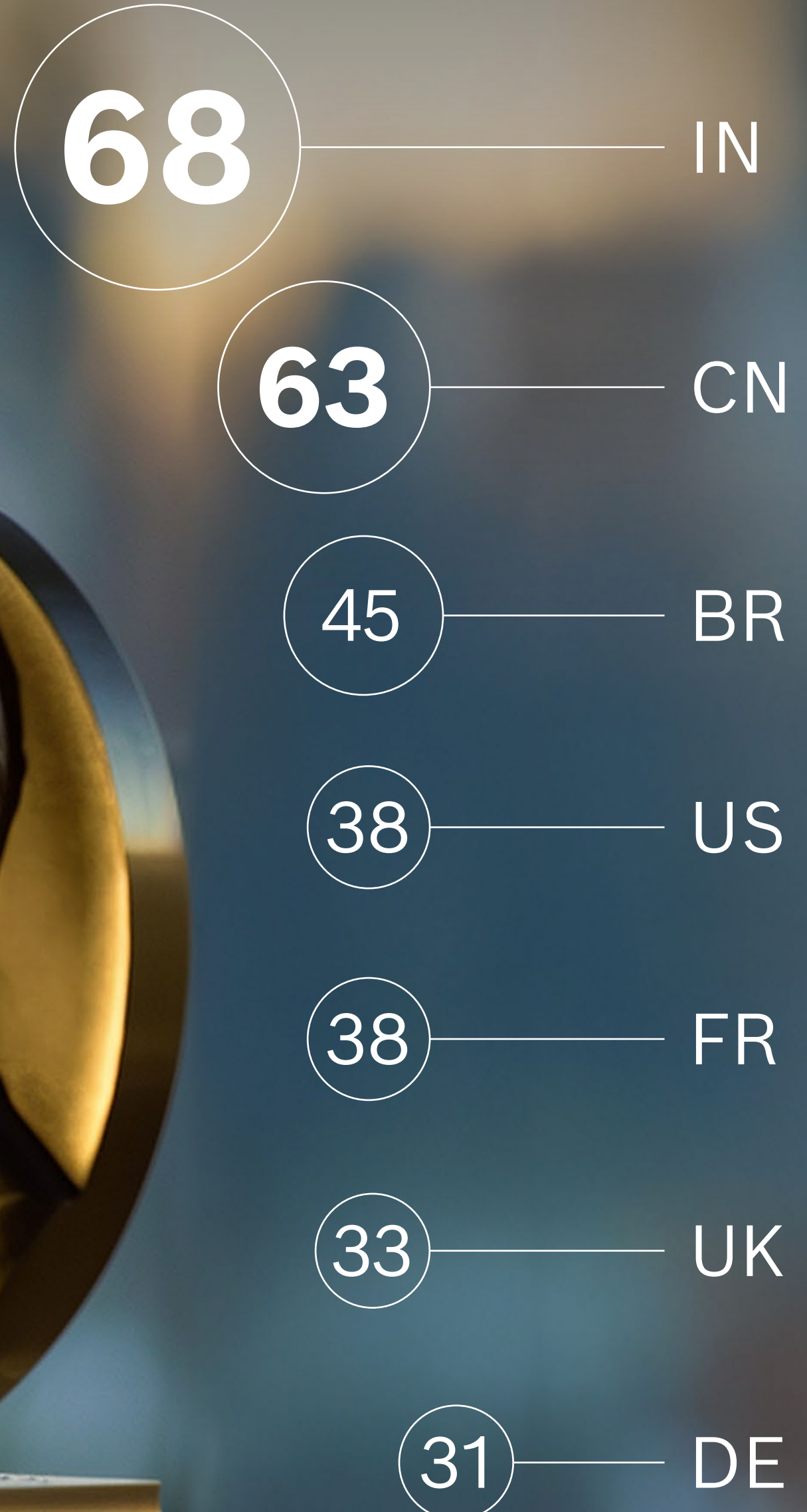
AI AS A NOBEL PRIZE WINNER?

Do you think it is possible for an AI to win the Nobel Prize in the future?

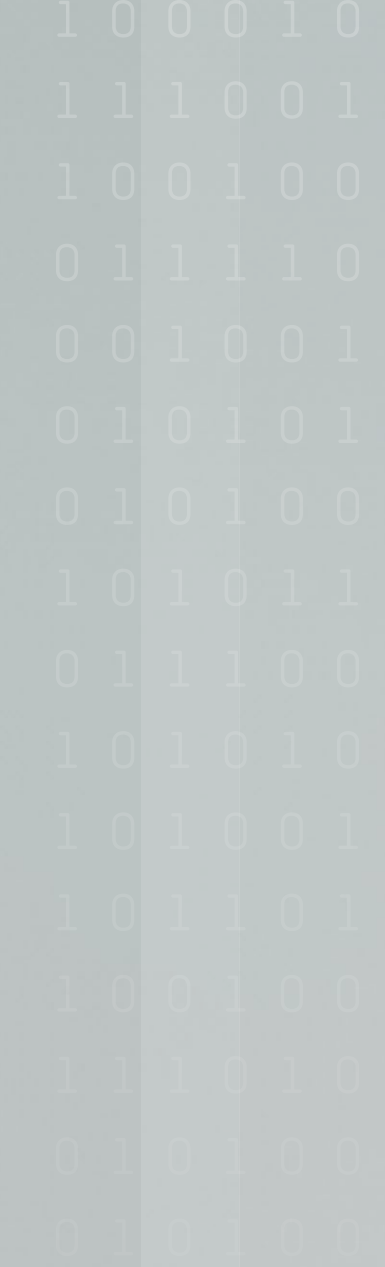
Answers in %

AI-generated image

0 1 0
0 1 1
1 0 1
0 1 1
0 1 1
1 0 1
1 0 0
0 1 0
1 1 0
1 1 1
0 1 0
0 0 0
0 0 1
1 0 0
0 0 1



Answers were scaled from 1 to 4. Top-2-Box Results. BR N=2002, CN N=2004, DE N=1018, FR N=1002, IN N=2003, UK N=1000, US N=2001.



IN 72

CN 65

US 35

BR 34

UK 30

FR 28

DE 20



AI AS A MARKET COMPETITOR?

Should AI have the right to patent its own inventions and innovations, competing against human inventors in the market?

Answers in %

AI-generated image

Answers were scaled from 1 to 4. Top-2-Box Results.
BR N=2002, CN N=2004, DE N=1018, FR N=1002,
IN N=2003, UK N=1000, US N=2001.

AI BREAKING OLYMPIC RECORDS?

Do you think it's possible for AI-controlled humanoid robots to break world records in most Olympic disciplines in the future?

Answers in %

Answers were scaled from 1 to 4. Top-2-Box Results.
BR N=2002, CN N=2004, DE N=1018, FR N=1002,
IN N=2003, UK N=1000, US N=2001.

IN 77

CN 63

BR 59

FR 52

UK 46

US 46

DE 42

IN 72

CN 65

BR 57

US 41

UK 40

FR 39

DE 36

AI SOLVING POLITICAL CONFLICT?

Should politicians use AI to help them resolve political conflicts in the future?

Answers in %



AI-generated image

Answers were scaled from 1 to 4. Top-2-Box Results.
BR N=2002, CN N=2004, DE N=1018, FR N=1002,
IN N=2003, UK N=1000, US N=2001.



Computer-assisted web interviews (CAWI) via online access panels



General public (representative sample in terms of age, gender, and region)



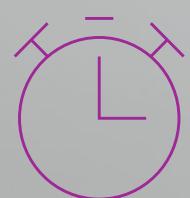
BR, CN, DE, FR, IN, UK, US



October 2 – October 14, 2024



15 minutes



STUDY DESIGN

METHODS

For this study people aged 18 and over were surveyed online in seven countries (Brazil, China, France, Germany, India, UK and USA) in October 2024 by Gesellschaft für Innovative Marktforschung mbH (GIM) on behalf of Robert Bosch GmbH. In France, Germany and the United Kingdom, a minimum of 1,000 people each were surveyed; in Brazil, China, India, and the United States, a minimum of 2,000 people each were surveyed.

The samples are representative for the respective country in terms of region, gender, and age (BR, DE, FR, UK, USA: 18–69 years/CN, IN: 18–59 years). For global results (“Global Index”), an average was taken across the seven countries, regardless of population size. Unless otherwise stated: values based on Top 2 Box. For ease of reading and interpretation, the global index for 2023/2024/2025, in each case based on 7 countries, is occasionally compared with the index of 2022 based on 5 countries. Calculating a global index for 2023/2024/2025 based on the 5 previous countries provided equivalent results.

COUNTRY	SAMPLE SIZE	SPECIFICS
BR	2,002	Age distribution: 18–69 years, regional distribution among 5 main regions
CN	2,004	Age distribution: 18–59 years, data collection in Tier 1 + New Tier 1
DE	1,018	Age distribution: 18–69 years, regional distribution among 4 main regions
FR	1,002	Age distribution: 18–69 years
IN	2,003	Age distribution: 18–59 years
UK	1,000	Age distribution: 18–69 years
US	2,001	Age distribution: 18–69 years, regional distribution among 7 main regions

AND WHAT DO YOU THINK ABOUT TECH?

PUBLISHING DETAILS

Robert Bosch GmbH
Corporate Department Communications
& Governmental Affairs
Executive Vice President: Prof. Dr. Christof Ehrhart
Postfach 10 60 50 | 70049 Stuttgart, Germany
bosch.com
As per January 2025

PICTURE CREDITS

P. 3: Freepik on freepik.com
P. 4: cyberneticbloom on freepik.com
P. 5: top left: Freepik on freepik.com,
bottom left: Roberto Hund on pexels.com,
middle: RDNE Stock project on pexels.com,
right: rawpixel.com on freepik.com
P. 6: muhammadazeem2611 on freepik.com,
overlay: Freepik on freepik.com
P. 20: Freepik AI-generated image on freepik.com
P. 23: Freepik on freepik.com
P. 26: Freepik on freepik.com
P. 29: namii9 on freepik.com
P. 30: francisco75 AI-generated image on freepik.com
P. 31: BrandHikes AI-generated image on freepik.com
P. 32: meshcube on freepik.com
P. 33: hudazip01 AI-generated image on freepik.com
P. 34: rawpixel.com on freepik.com