Brazil
China
France
Germany
India
UK
US

BOSCH

WE ASKED THE WORLD

WHAT DO PEOPLE AROUND THE WORLD THINK AND FEEL ABOUT TECHNOLOGY? AND WHAT DO THEY EXPECT FROM **INNOVATION?**

5-YEAR TRENDS

A first-of-its-kind analysis of public sentiment on technology from 2022–2026, revealing dramatic shifts and surprising stability

TECH COMPASS 2026

WHAT'S **INSIDE?**

FOREWORD

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

The defining challenge of our time is no longer only change itself, but its breathtaking speed. Driven by innovation and fueled by artificial intelligence, this acceleration raises a critical question: How do we steer progress in a positive direction? We believe that if we want to find answers, we must begin by asking people. This principle guides our work: our job is not only to invent technology, but to actively discover what people need and how our innovations can best complement their lives. That is the purpose of the Bosch Tech Compass. This year we ask people around the globe how innovation affects their lives and their local economies in a world of increasing geopolitical challenges.

Now in its fifth year, the 2026 Bosch Tech Compass – a representative survey across seven leading industrial nations – offers a unique window into the world's relationship with technology. The 2026 edition reveals a world caught between two powerful forces: an eagerness for progress and a deep-seated caution about its speed.

Nowhere is this tension more visible than in the perception of AI. What was recently hype is now seen as the single most influential technology of our future. Remarkably, the number of people who believe this has skyrocketed from 41% to 70% globally in just three years. Yet, this acceptance is met with a call for reflection. A 57% majority now want to slow the pace of progress to better understand its consequences. This isn't a contradiction, it's a natural reaction. The faster the train, the more people worry about the brakes.

For us at Bosch, this isn't a signal to stop. It's a mandate for responsible innovation. Slowing down is not an option when the world faces such urgent challenges. The only path forward is to innovate with integrity.

Beyond the pace of change, our survey reveals that innovation is not just about technology. It's also about the ecosystem that surrounds it. We see a dramatic divergence in confidence. Overwhelming majorities in China (77%) and India (76%) believe their education systems foster innovation. In Europe, the sentiment is reversed, with only 30% in Germany feeling the same. The US (53%) and UK (54%) are divided. The perceived barriers to innovation are just as telling: 65% of Germans cite bureaucracy as the primary obstacle, a concern shared by only 35% in China and the US.

The lesson is clear: technological innovation alone is not enough. It requires an environment of trust, supported by education that sparks curiosity and governance that clears the path. The solution to our greatest challenges remains more, not less, technology. But this survey adds a crucial mandate: we must also be advocates for the conditions that allow innovation to flourish for all.

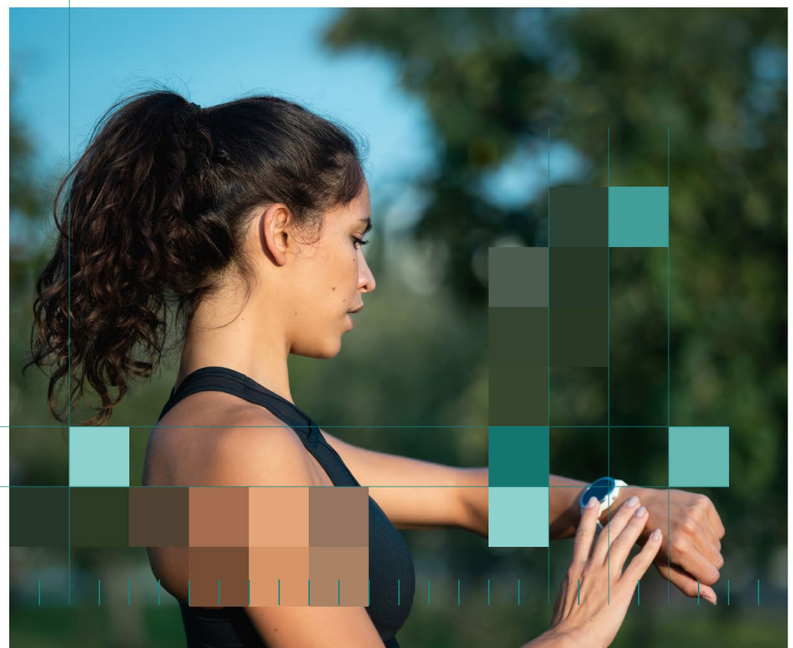
The Bosch Tech Compass 2026 provides a roadmap through the hopes and fears of our technological age. It shows that people want progress, but they want it to be safe and human-centric. This finding is a powerful confirmation of our “Invented for life” ethos. It sharpens our focus on not just what we build, but how we build it, and the world we help build in the process.

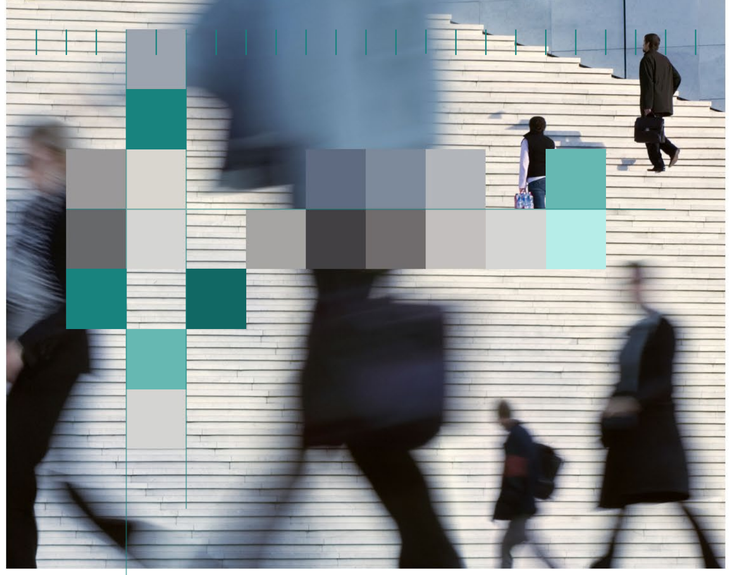
Thank you for joining us on this journey.

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

SUMMARY

HALF OF ALL RESPONDENTS WANT TO SEE INNOVATIONS IN PERSONAL HEALTH TECHNOLOGY





57% BELIEVE WE SHOULD **SLOW DOWN TECH PROGRESS UNTIL ITS IMPACT IS BETTER UNDERSTOOD**

GLOBALLY, QUALIFIED **PEOPLE ARE SEEN AS THE BIGGEST DRIVER OF INNOVATION**

PEOPLE WORLDWIDE SAY **DATA SECURITY IS AS CRUCIAL AS PRICE IN PRODUCT INNOVATION**

60% WORLDWIDE SAY **SMARTPHONES ARE THE MOST INFLUENTIAL INNOVATION OF THE PAST 20 YEARS**

WHAT DO PEOPLE EXPECT FROM **INNOVATION?**

WHERE SHOULD WE INNOVATE?

In your personal life, in which area do you hope to see a single innovation in the next 5 years that could meaningfully improve your life?

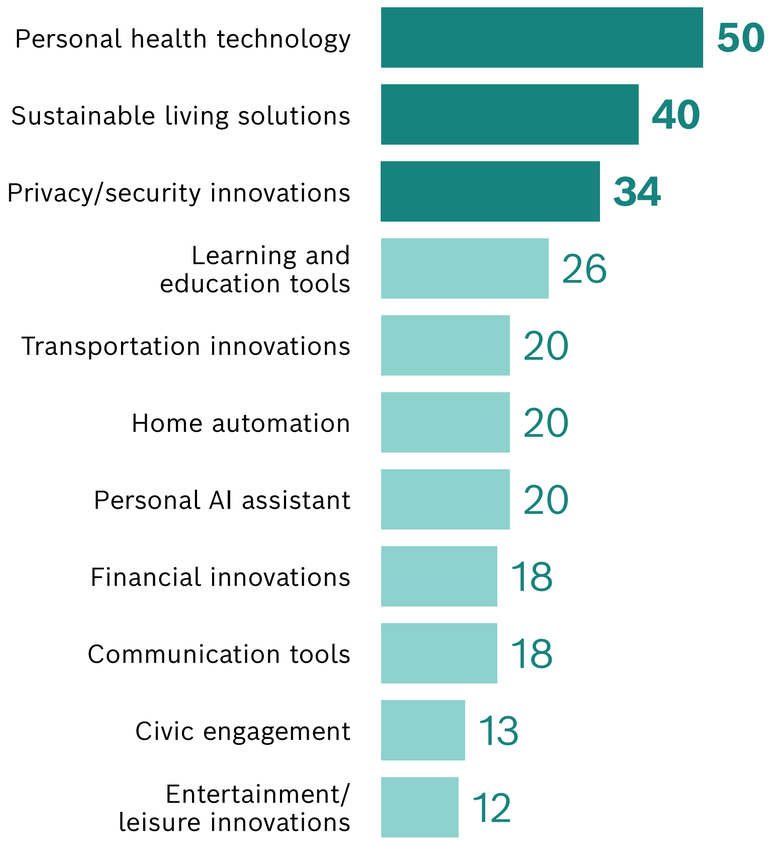
GLOBAL INDEX

Half of the people surveyed would like to see more innovation in personal health technology. Sustainable living solutions was second, but some way behind. Innovations that often grab news headlines didn't rate highly.

REGIONAL

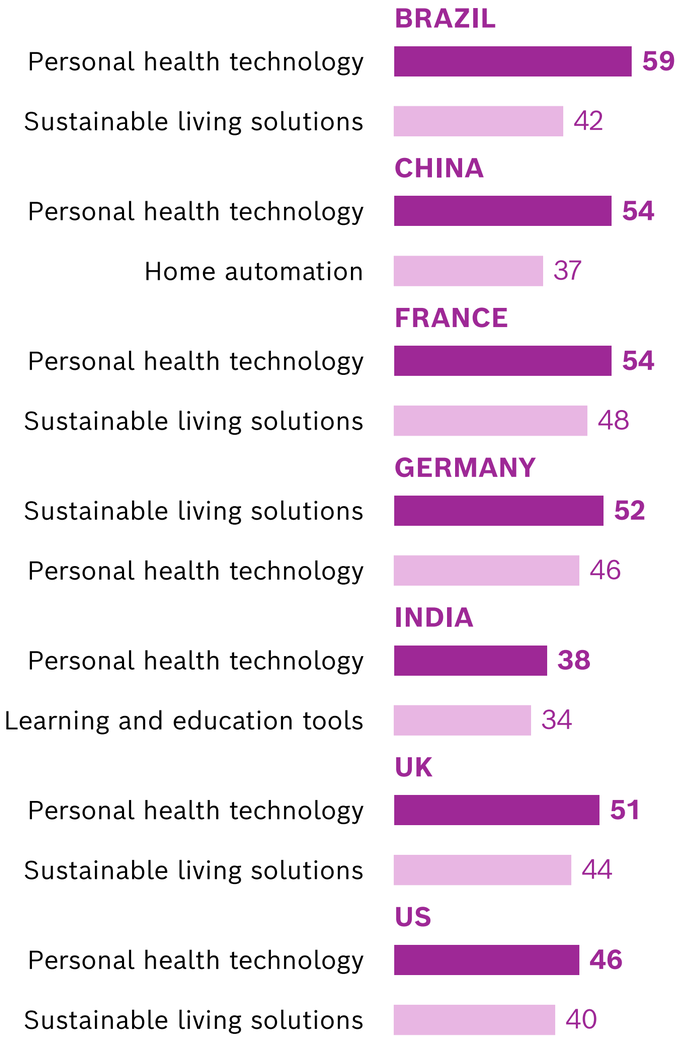
Health technology ranked first for every country other than Germany, where it was second. Rankings were notably high for home automation in China and for learning tools in India.

GLOBAL INDEX



N = 11028. Answers in %.

REGIONAL TOP TWO

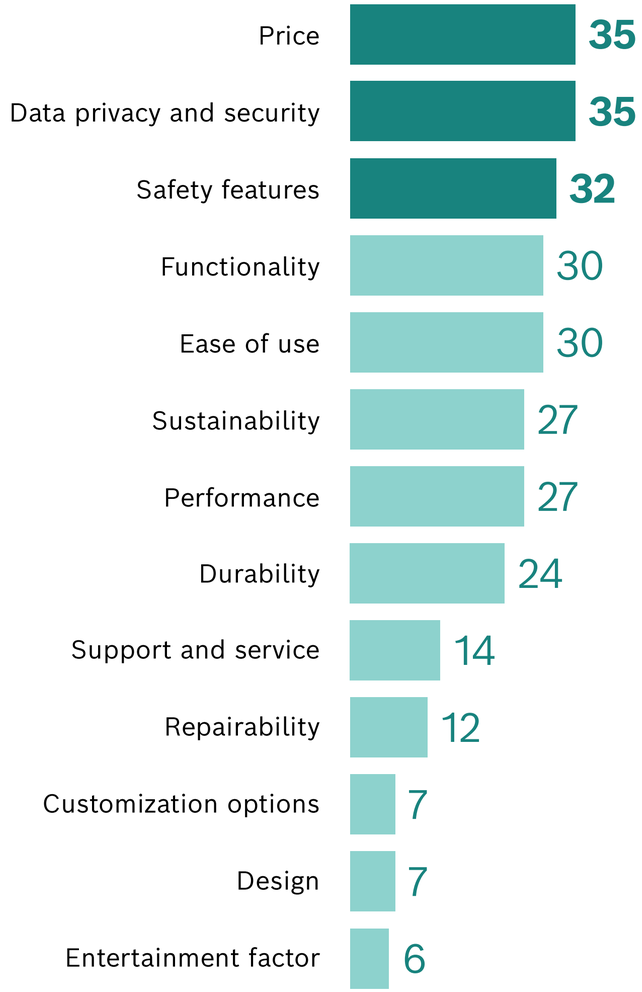


BR N = 2009, CN N = 2002, DE N = 1011, FR N = 1000, IN N = 2002, UK N = 1004, US N = 2000. Answers in %.

WHAT MATTERS MOST?

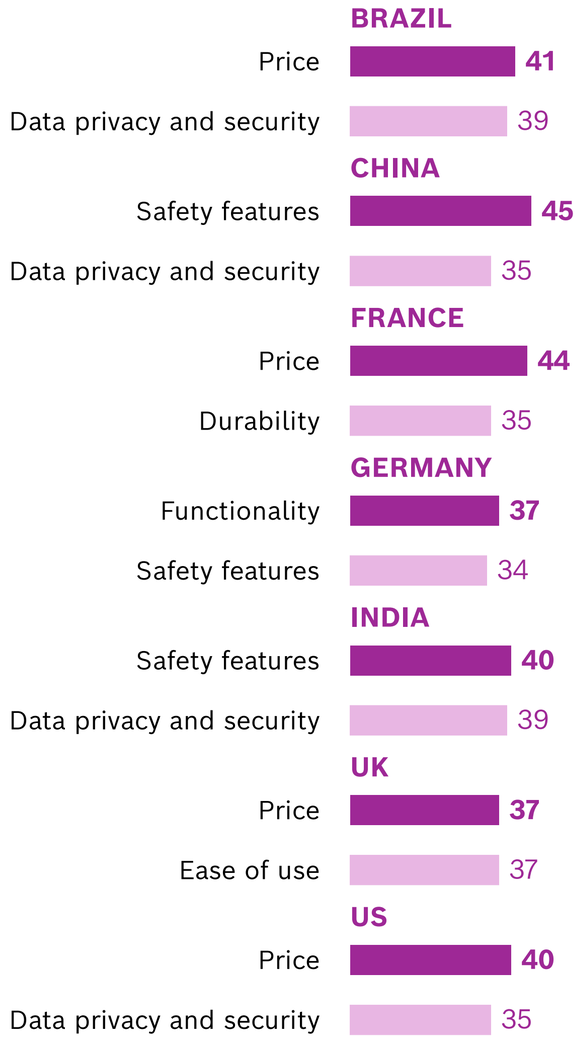
In which of the following product characteristics is innovation particularly important to you?

GLOBAL INDEX



N = 11028. Answers in %.

REGIONAL TOP TWO



BR N = 2009, CN N = 2002, DE N = 1011, FR N = 1000, IN N = 2002, UK N = 1004, US N = 2000. Answers in %.

GLOBAL INDEX

Innovation can be focused on a variety of different product areas. Respondents ranked price, data privacy and security, and safety features as the most important to them. Overall, the top eight characteristics were similarly rated. Product innovations in design and entertainment ranked the lowest.

REGIONAL

For most Western countries, the top demand from innovation was lower cost (ranking first in the US, UK, and France), while for China and India, it was safety features.

MOST IMPACTFUL INNOVATION

What technological innovation in the last 20 years has had the most positive impact on your life?

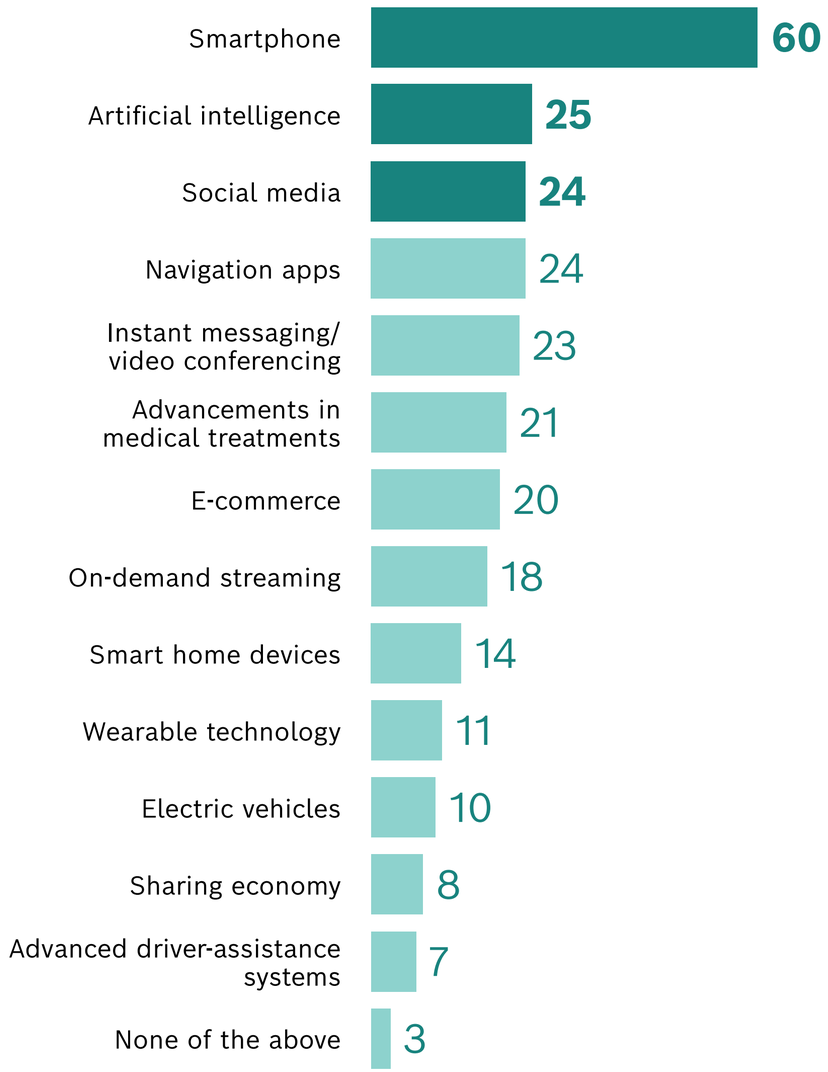
GLOBAL INDEX

The smartphone (60%) was overwhelmingly cited as the most impactful technological innovation of the last 20 years, with its influence felt strongly across all surveyed countries. Artificial intelligence narrowly beat social media and navigation apps to second place.

REGIONAL

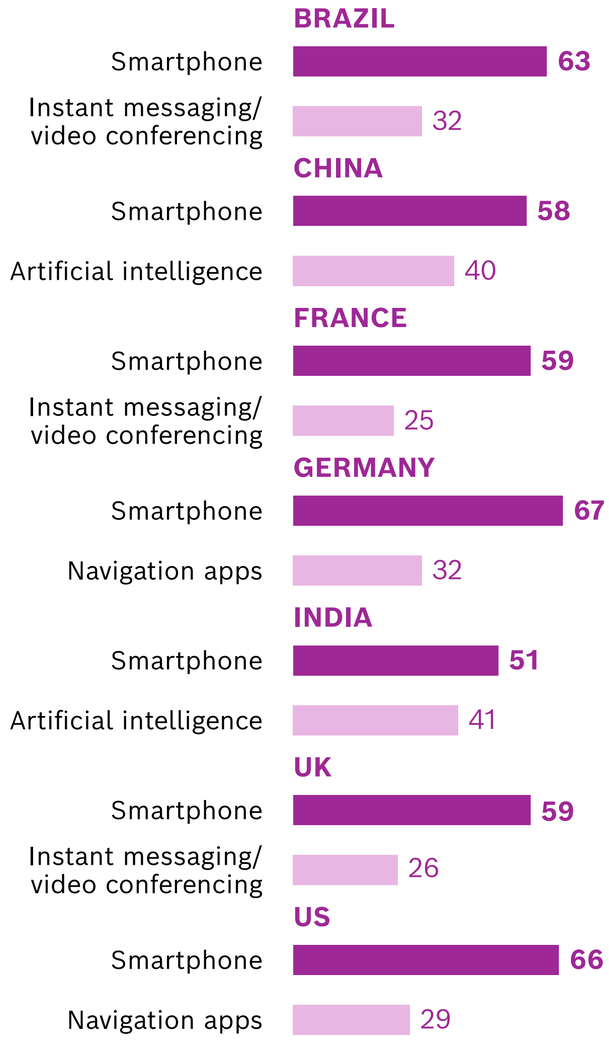
The smartphone was ranked first in every country. A variety of innovations took second place, with AI scoring the highest at 41% in India.

GLOBAL INDEX



N = 11028. Answers in %.

REGIONAL TOP TWO



BR N = 2009, CN N = 2002, DE N = 1011, FR N = 1000, IN N = 2002, UK N = 1004, US N = 2000. Answers in %.

INNOVATION DRIVERS

What are the biggest drivers of innovation in your country?

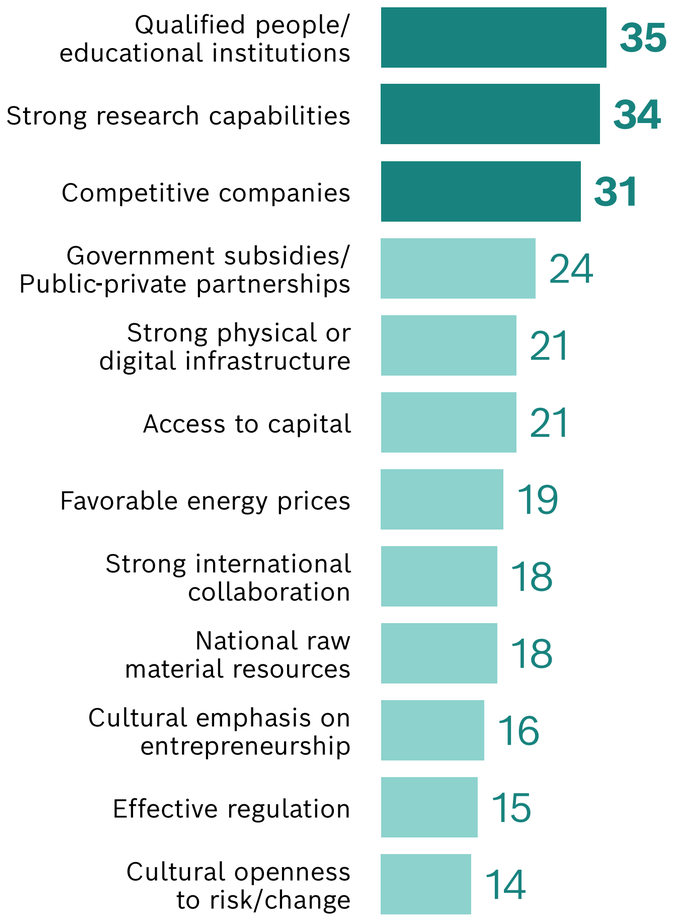
GLOBAL INDEX

In a close result, respondents valued education and qualifications the most when it comes to driving innovation in their country. Strong research capabilities were second, which links to good universities. Competitive companies were also seen as a factor in successful innovation.

REGIONAL

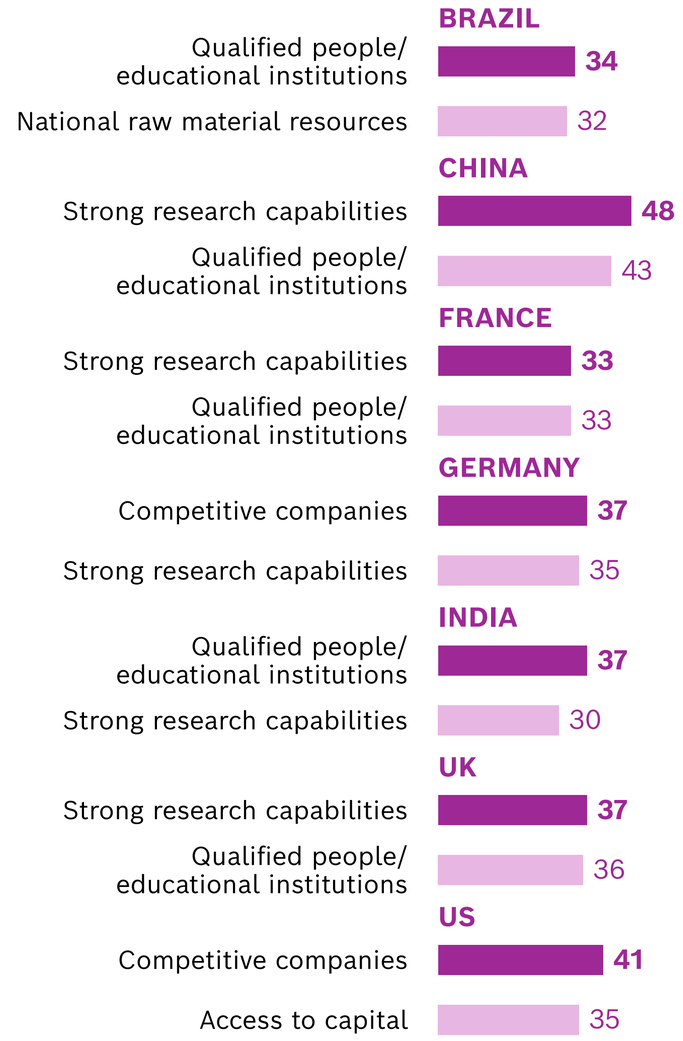
In China, strong research capabilities (48%) were seen as the primary driver for innovation. In contrast, the US and Germany pointed to their competitive companies (41% and 37%) as the main engine of innovation. Meanwhile, in Brazil, national raw material resources (32%) were considered a key driver, while in India, it was qualified people (37%).

GLOBAL INDEX



N = 11028. Answers in %.

REGIONAL TOP TWO



BR N = 2009, CN N = 2002, DE N = 1011, FR N = 1000, IN N = 2002, UK N = 1004, US N = 2000. Answers in %.

INNOVATION BARRIERS

What are the biggest barriers to innovation in your country?

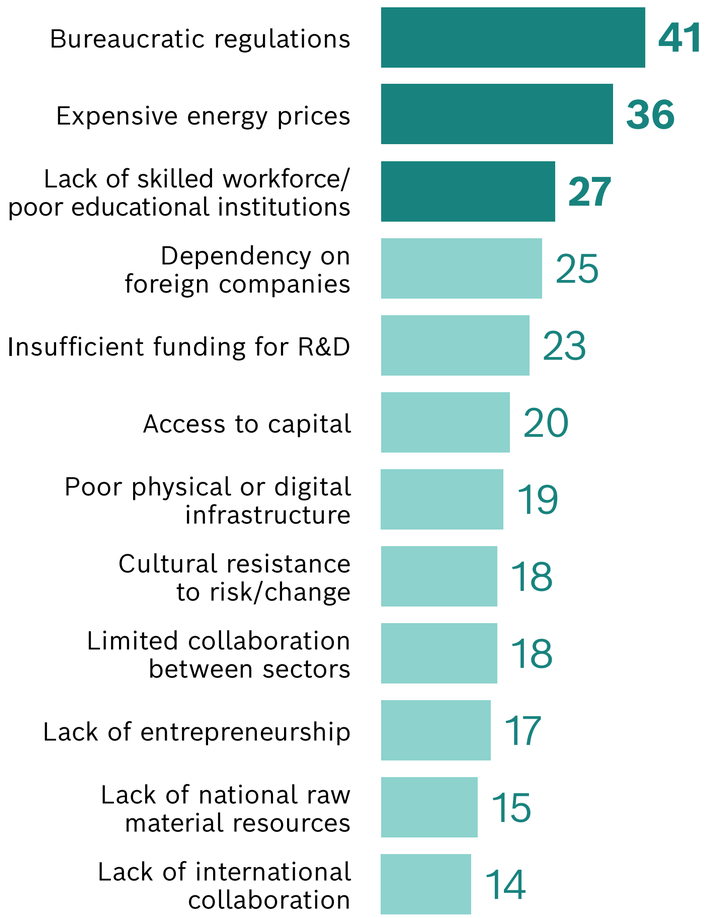
GLOBAL INDEX

In contrast to the previous question, we asked what might be holding innovation back. Bureaucratic regulations came top, with a notable lead over expensive energy prices.

REGIONAL

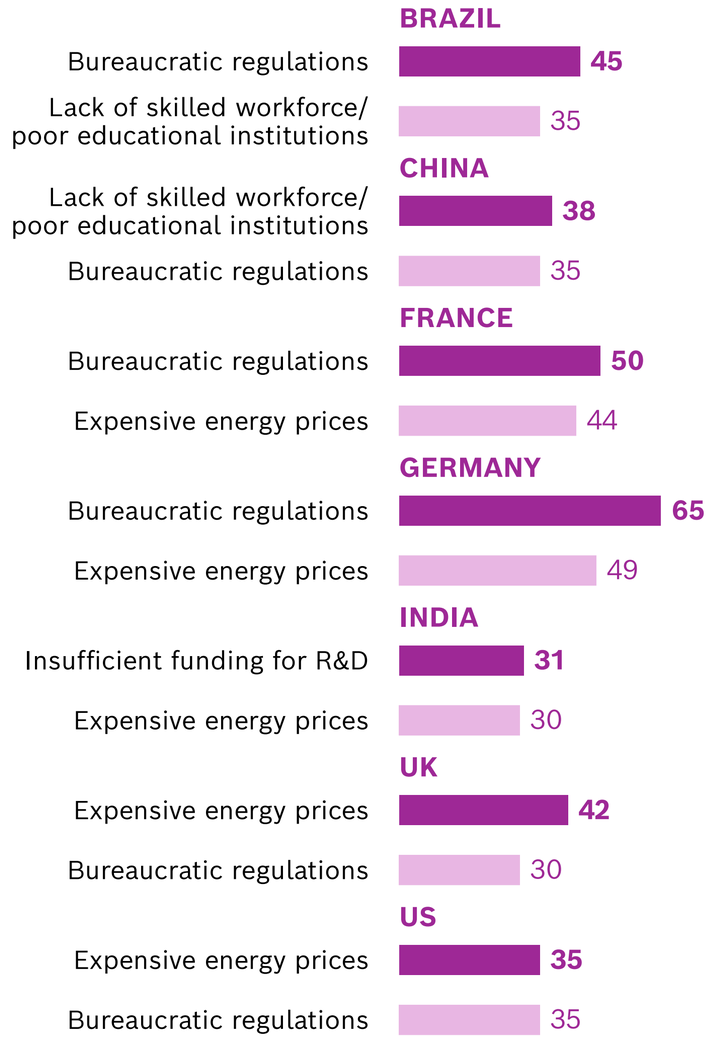
A notably high percentage of respondents from Germany ranked bureaucratic regulations as a barrier. In fact, they scored highest at 65%, some distance ahead of France and Brazil, where they reached 50% and 45%, respectively.

GLOBAL INDEX



N = 11028. Answers in %.

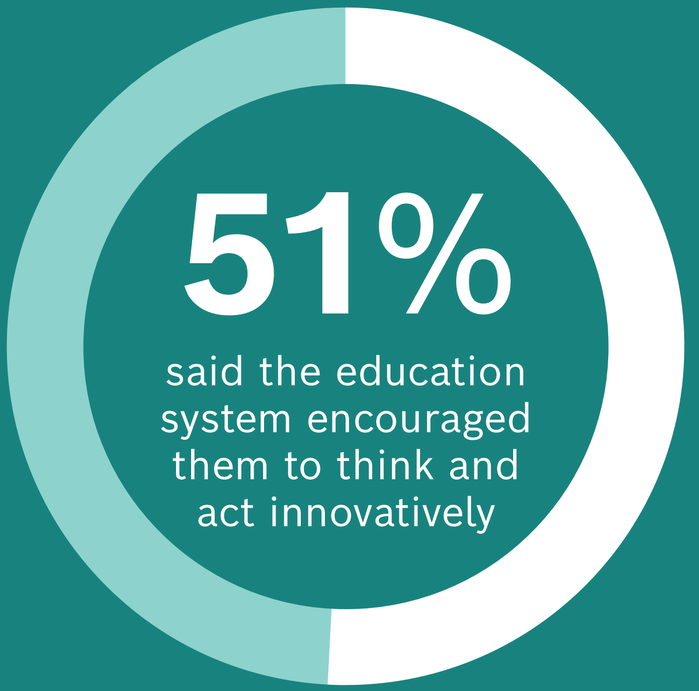
REGIONAL TOP TWO



BR N = 2009, CN N = 2002, DE N = 1011, FR N = 1000, IN N = 2002, UK N = 1004, US N = 2000. Answers in %.

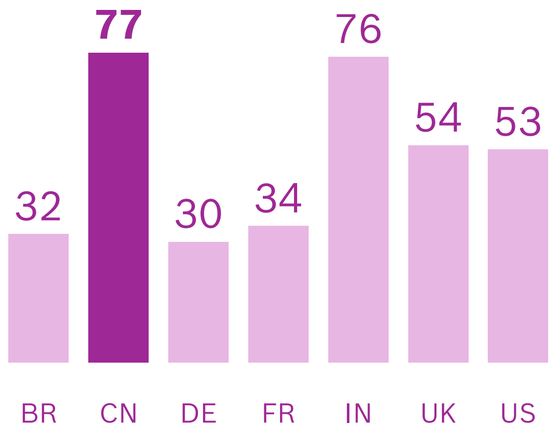
DO SCHOOLS FOSTER INNOVATION?

Has the education system in your country encouraged you to think and act innovatively?



REGIONAL

There were clear differences between the seven countries. In China, 77% gave a resounding ‘yes’ to the question, as did 76% of respondents from India. In the UK (54%) and the US (53%) around half of people agreed. This dropped to around one in three in the other three countries.



BR N = 2009, CN N = 2002, DE N = 1011, FR N = 1000, IN N = 2002, UK N = 1004, US N = 2000. Answers in %.

GLOBAL INDEX

In a question that reveals significant regional differences, the global average works out to almost exactly one in two agreeing that their education system encourages innovation.

Answers were scaled from 1 to 4. Top-2-Box Results. N = 11028. Answers in %.

SHAPING FUTURE TALENT

Which competencies should educational institutions emphasize to cultivate the next generation of innovators?

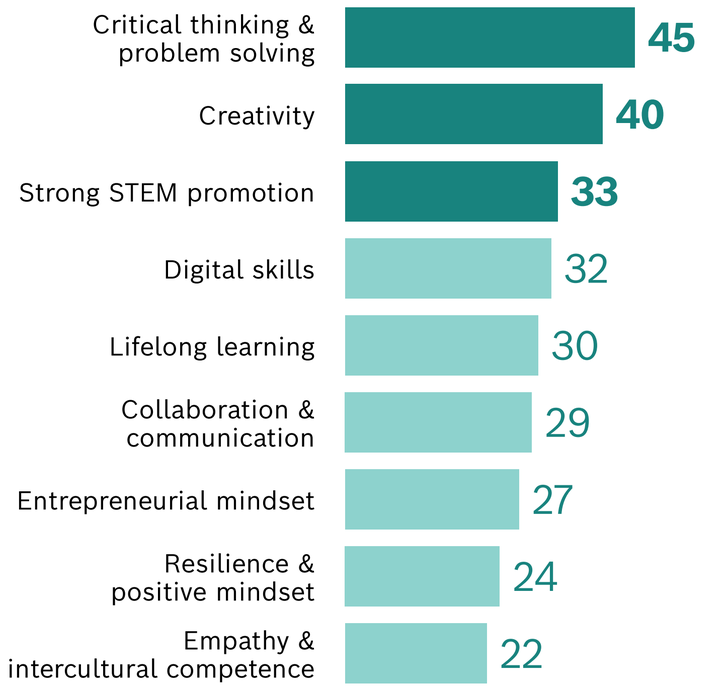
GLOBAL INDEX

A wide variety of factors contribute to strong innovation and many of them scored highly. However, critical thinking and problem solving were comfortably in first position.

REGIONAL

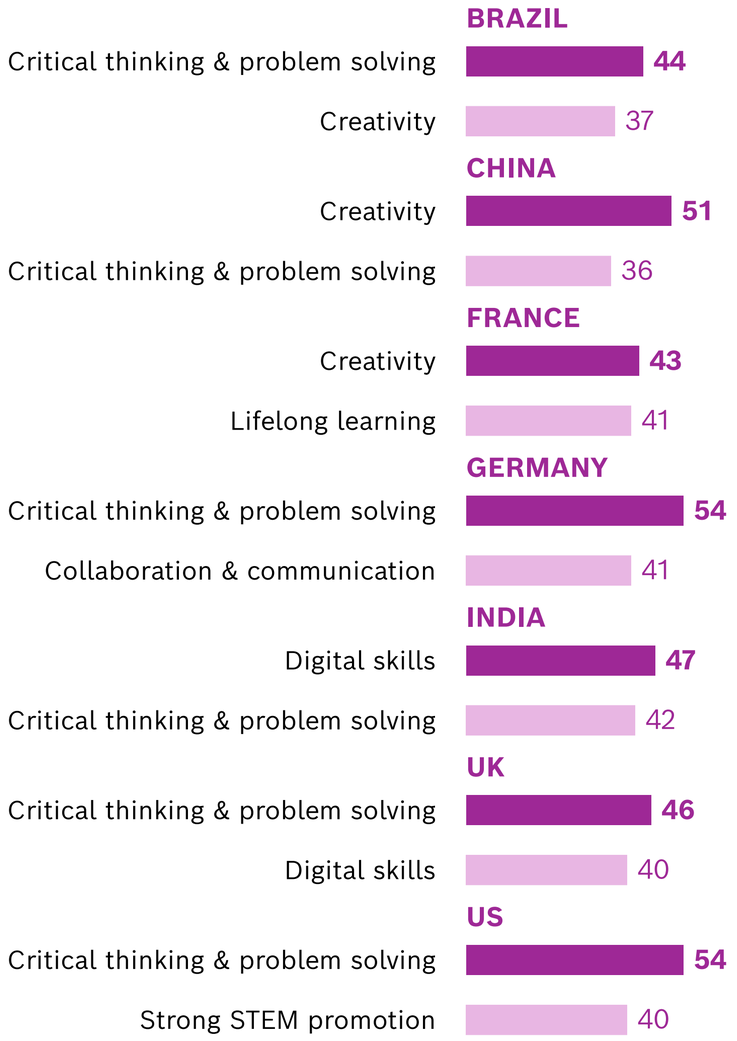
Creativity came first in China and France and was ranked second in Brazil. Digital Skills placed first in India and second in the UK. France also highlighted lifelong learning.

GLOBAL INDEX



N = 11028. Answers in %.

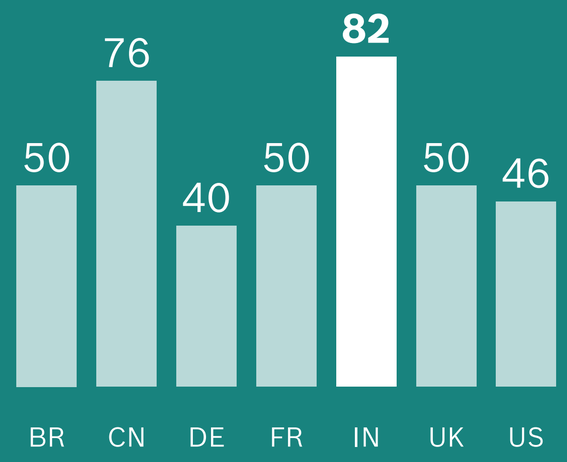
REGIONAL TOP TWO



BR N = 2009, CN N = 2002, DE N = 1011, FR N = 1000, IN N = 2002, UK N = 1004, US N = 2000. Answers in %.

READY FOR THE **AI ERA?**

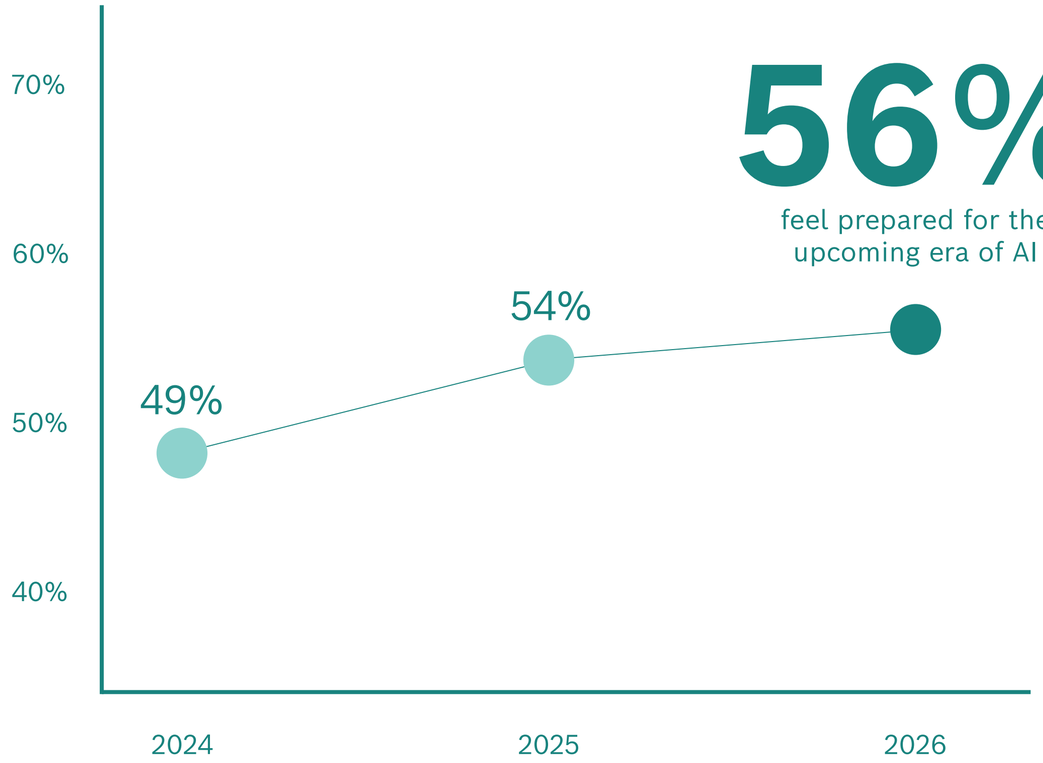
To what extent do you personally agree with the statement ‘I personally feel prepared for the upcoming era of AI (Artificial Intelligence)’.



REGIONAL

In India and China, a comfortable majority felt ready with respectively 82% and 76% agreeing. The rest of the countries rank between 40% and 50%. Brazil, France and the UK all score exactly 50%.

BR N = 2009, CN N = 2002, DE N = 1011, FR N = 1000, IN N = 2002, UK N = 1004, US N = 2000. Answers in %.



56%

feel prepared for the upcoming era of AI

GLOBAL INDEX

This figure has been increasing year on year. The 2026 score of 56% is an increase of 2 percentage points from last year, and an increase of 7 percentage points compared to 2024.

Answers were scaled from 1 to 4. Top-2-Box Results.
2026 N = 11028, 2025 N = 11030, 2024 N = 11264. Answers in %.

“THE TRUE POTENTIAL OF TECHNOLOGICAL INNOVATION ISN’T FOUND ON SCREENS OR IN VIRTUAL SPACES. IT’S REVEALED WHERE IT MEETS THE PHYSICAL WORLD – WHERE THINGS MOVE AND TECHNOLOGY MAKES PEOPLE’S LIVES EASIER AND SAFER.”

DR. STEFAN HARTUNG
CHAIRMAN OF THE BOARD OF MANAGEMENT

LEADING GLOBAL INNOVATION

In your opinion, which industry sector in your country is currently at the forefront of global innovation?

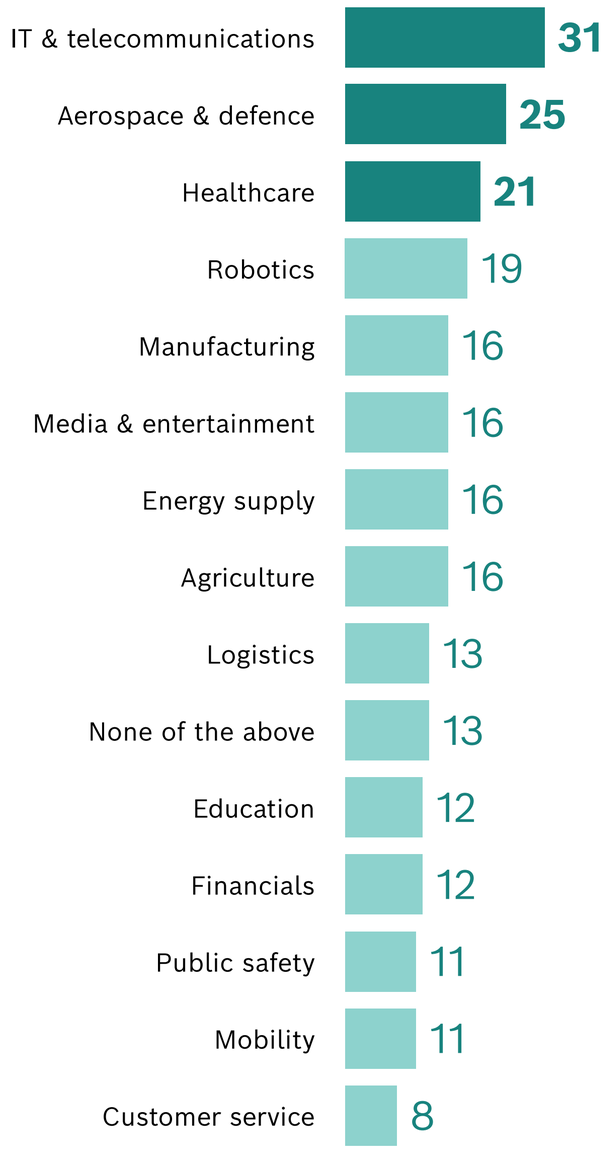
GLOBAL INDEX

Many countries lead the way in one area or another. That explains the wide variety of results, although IT & telecommunications is an area where many people felt their country had an edge.

REGIONAL

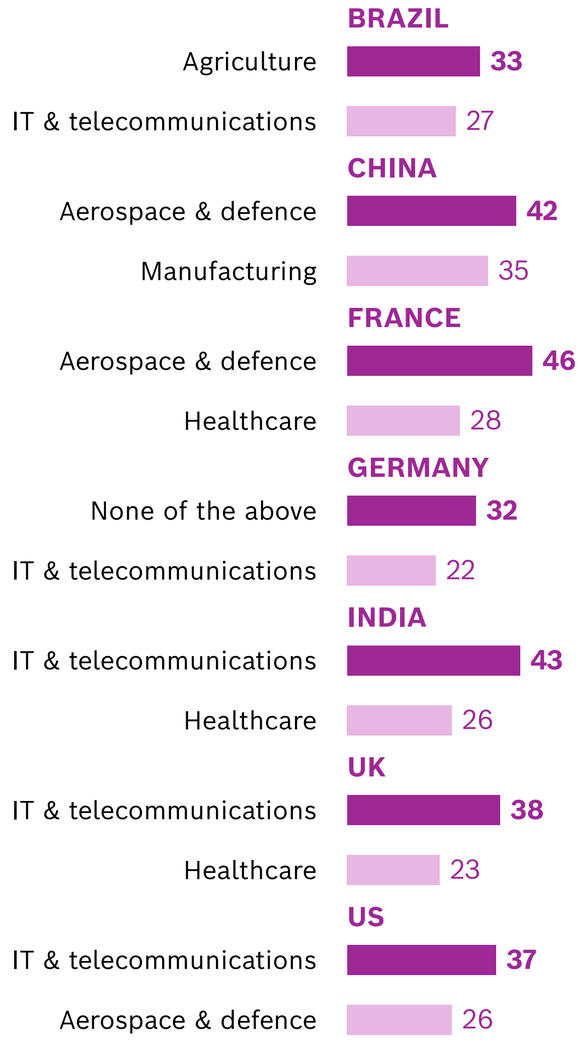
In Brazil, agriculture was seen as the sector where the country holds an advantage. In China and France, it was aerospace and defense, while healthcare ranked second in France, India and the UK.

GLOBAL INDEX



N = 11028. Answers in %.

REGIONAL TOP TWO

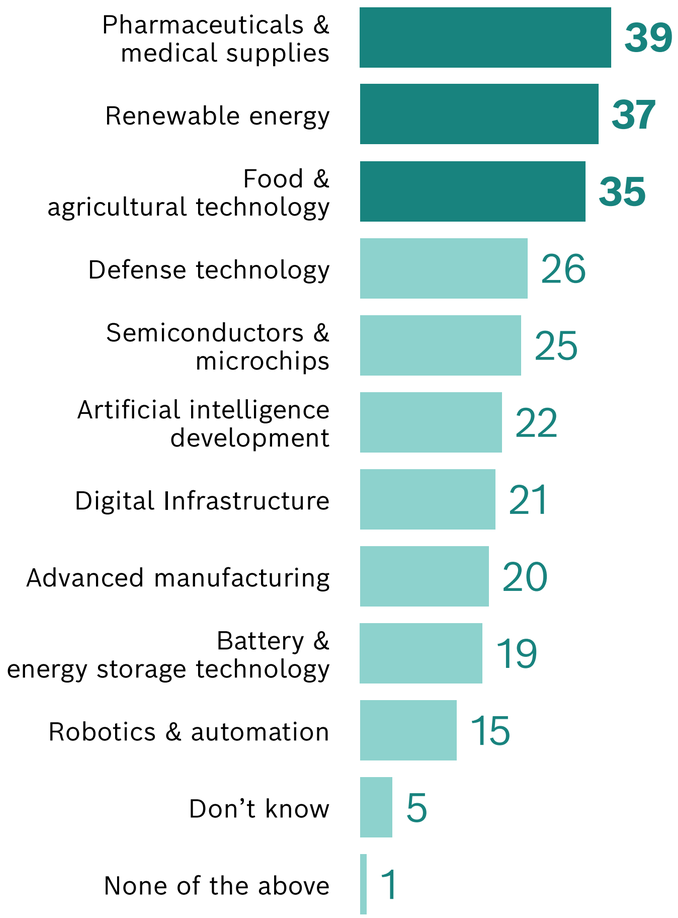


BR N = 2009, CN N = 2002, DE N = 1011, FR N = 1000, IN N = 2002, UK N = 1004, US N = 2000. Answers in %.

BUILD OR **IMPORT?**

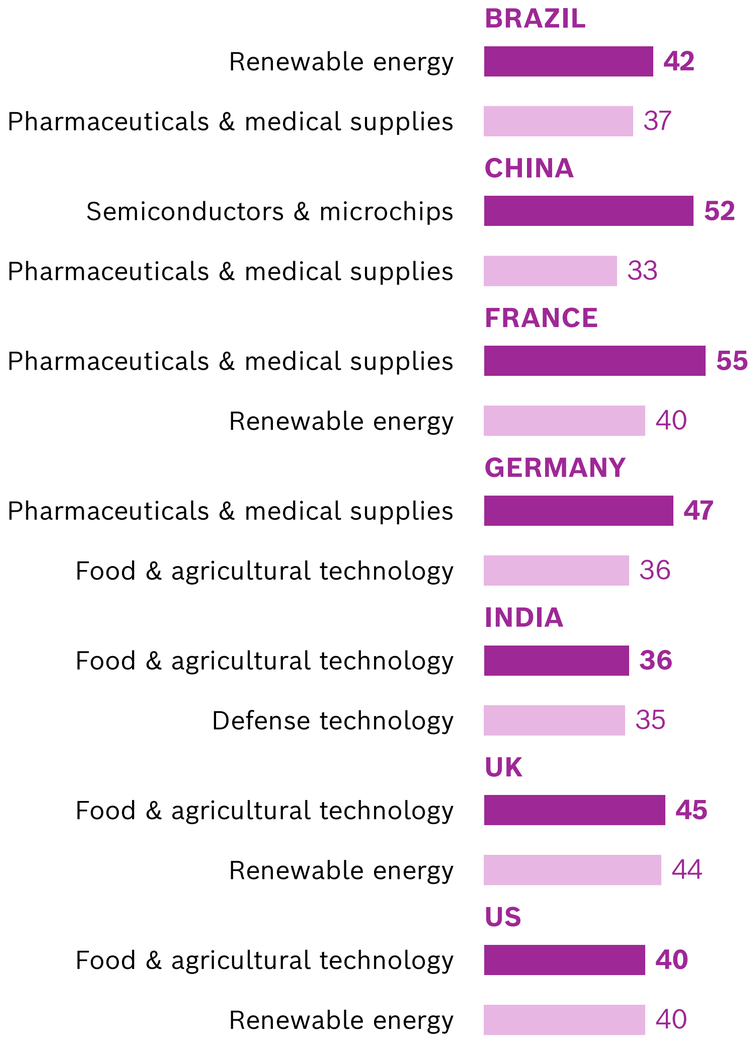
Which of the following industries do you believe is most important for your country to develop domestically, rather than relying on imports?

GLOBAL INDEX



N = 11028. Answers in %.

REGIONAL TOP TWO



BR N = 2009, CN N = 2002, DE N = 1011, FR N = 1000, IN N = 2002, UK N = 1004, US N = 2000. Answers in %.

GLOBAL INDEX

Three areas clearly stood out at the top of the ranking, with almost 40% saying that their country should develop domestically in the area of pharmaceutical and medical supplies.

REGIONAL

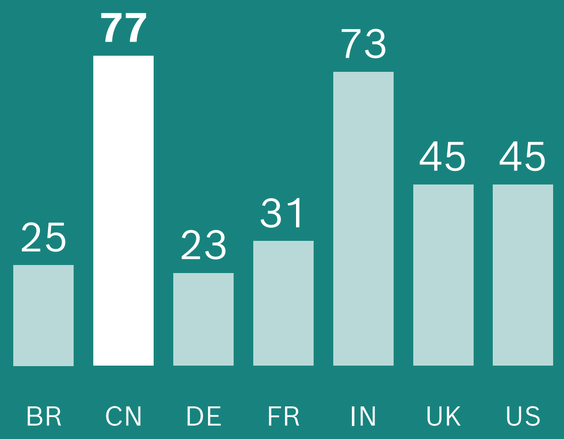
While renewable energy was second overall, only Brazil ranked it in first place. Food and agricultural technology was ranked first among respondents from India, the UK and the US. In China semiconductors and microchips was ranked top.

RULES FOR INNOVATION

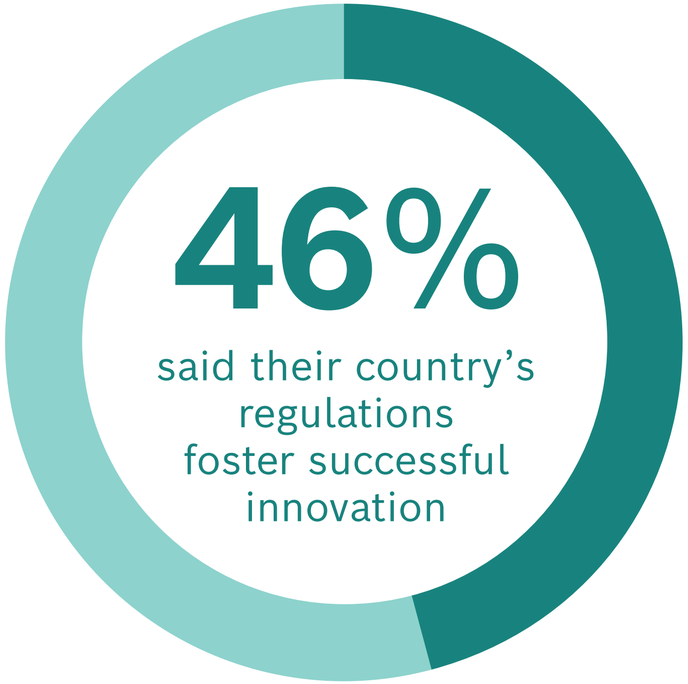
To what extent do you personally agree with the statement ‘In my country, the government gets the balance between funding innovation and regulating innovation right’?

REGIONAL

An overwhelming majority in China and India thought that their government gets the balance between funding and regulating innovation right. Next were the US and the UK, which scored almost identical results. Brazil, Germany and France had notably lower levels of agreement with the statement.



BR N = 2009, CN N = 2002, DE N = 1011, FR N = 1000, IN N = 2002, UK N = 1004, US N = 2000. Answers in %.



GLOBAL INDEX

Overall, the minority of people around the world agreed that their country’s regulations fostered successful innovation.

Answers were scaled from 1 to 4. Top-2-Box Results. N = 11028. Answers in %.

INNOVATION FOR GLOBAL **CHALLENGES**

In your opinion, which global challenge should technological innovation focus on the most?

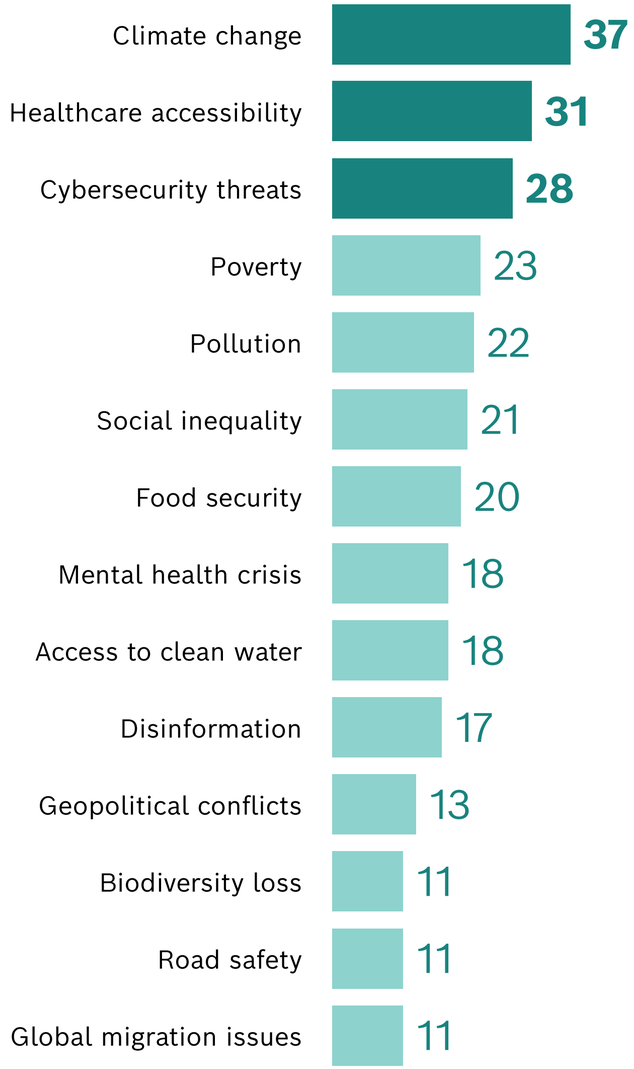
GLOBAL INDEX

Climate change was recognized as the global challenge that innovation should focus on the most. Healthcare, as in other questions, was an area where people want to see innovation.

REGIONAL

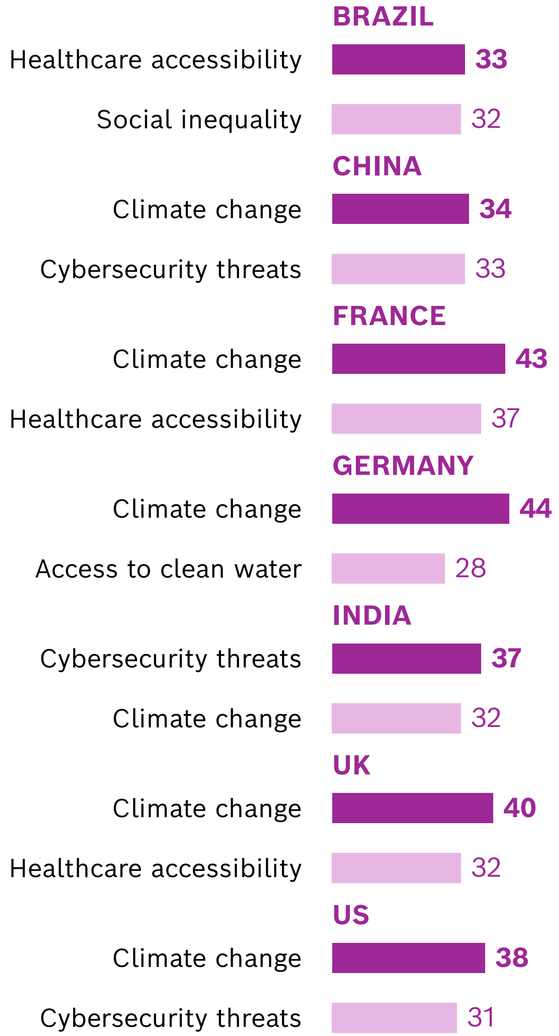
Climate change and healthcare consistently scored highly. In India, cybersecurity threats was ranked as the global challenge on which innovation should focus the most. This aspect was also ranked second in China and joint-second in the US.

GLOBAL INDEX



N = 11028. Answers in %.

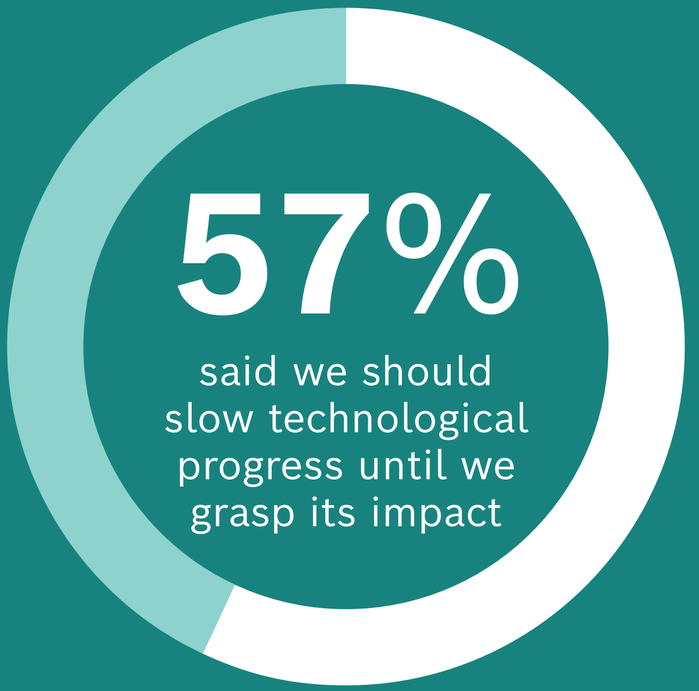
REGIONAL TOP TWO



BR N = 2009, CN N = 2002, DE N = 1011, FR N = 1000, IN N = 2002, UK N = 1004, US N = 2000. Answers in %.

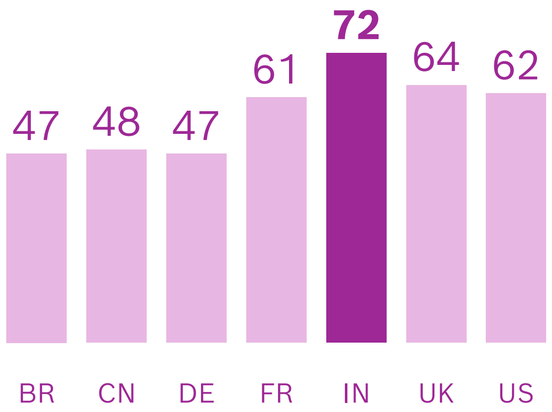
REDUCE THE PACE?

Should we slow down technological progress until we can better understand its consequences?



REGIONAL

India scored the highest on this question, with almost three in four agreeing with the statement. There were comfortable majorities in the UK, the US, and France. In China, Brazil and Germany, the result was closer to 50%.



BR N = 2009, CN N = 2002, DE N = 1011, FR N = 1000, IN N = 2002, UK N = 1004, US N = 2000. Answers in %.

GLOBAL INDEX

A clear majority of people thought we should slow down technological progress until we better understand its consequences.

Answers were scaled from 1 to 4. Top-2-Box Results. N = 11028. Answers in %.

For the first time, the Tech Compass analyzes 5 years of data to reveal significant trends from 2022 to 2026.

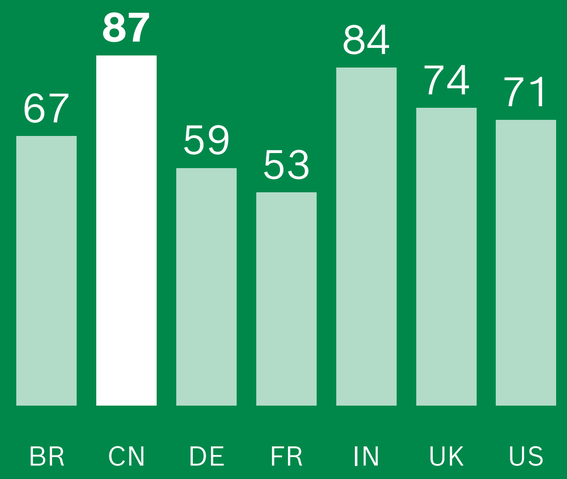
This period has been uniquely shaped by transformative forces, including the dawn of the AI era, the pandemic's lasting socioeconomic impact, critical environmental events, and rising geopolitical conflicts.

Amidst this volatility, our findings show dramatic shifts in public sentiment toward technology in some areas, yet surprising consistency in others. The following pages explore how our relationship with technology is evolving under these unprecedented circumstances.

ATTITUDES TOWARDS TECH

THE POSITIVES OF TECH

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



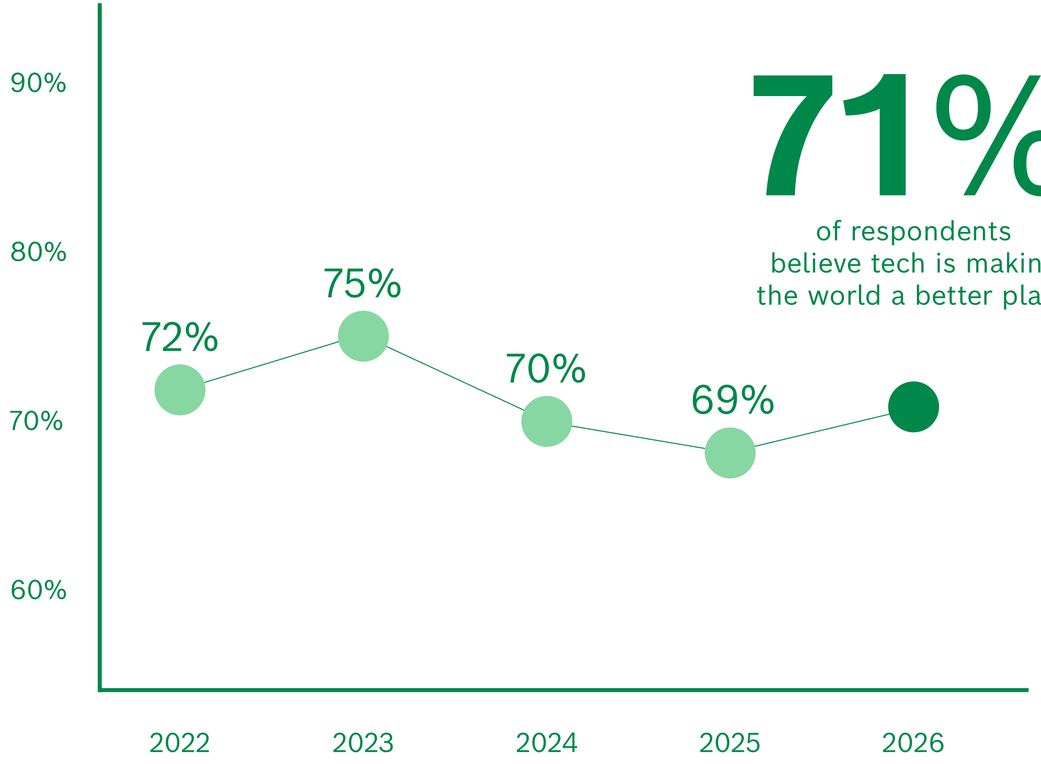
BR N = 2009, CN N = 2002, DE N = 1011, FR N = 1000, IN N = 2002, UK N = 1004, US N = 2000. Answers in %.

REGIONAL

Most regions agreed that technological progress has an overall positive impact on the world. While this view was particularly strong in China and India, the sentiment was slightly less pronounced in the UK and the US. France recorded a score that’s closer to a 50-50 perspective.

5-YEAR TREND

A first-of-its-kind analysis of public sentiment on technology from 2022–2026, revealing dramatic shifts and surprising stability.



71%

of respondents believe tech is making the world a better place

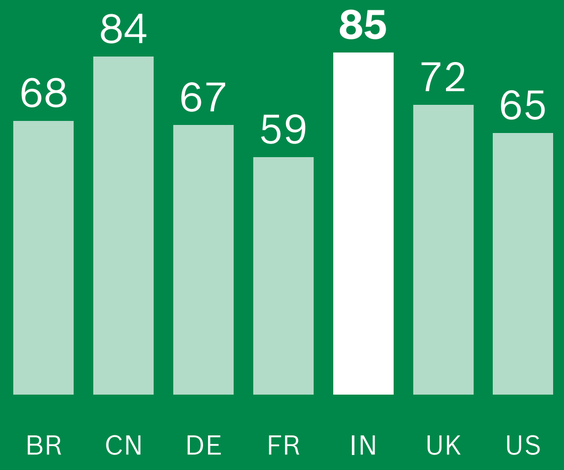
GLOBAL INDEX

This question is central to the thinking behind the Tech Compass. After two years of decline, optimism about technology was once again expressed by over 70% of respondents. Now, almost three in four think technology is having a positive impact.

Answers were scaled from 1 to 4. Top-2-Box Results. 2026 N = 11028, 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’?



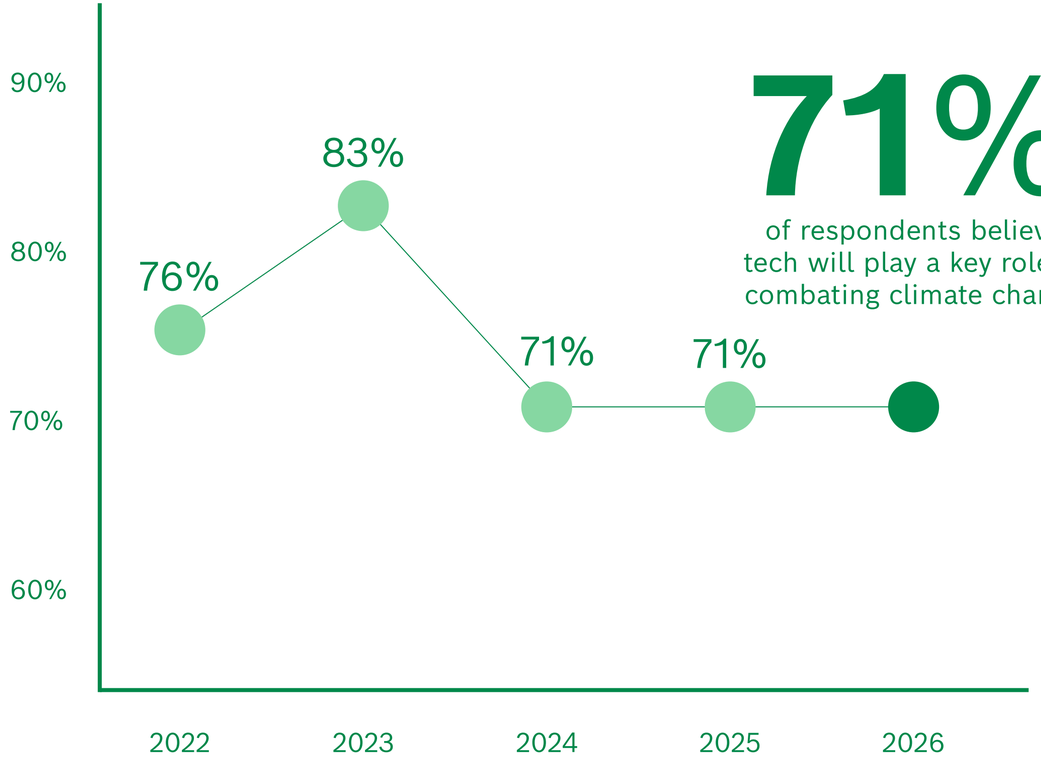
BR N = 2009, CN N = 2002, DE N = 1011, FR N = 1000, IN N = 2002, UK N = 1004, US N = 2000. Answers in %.

REGIONAL

Every country had a strong level of agreement with the statement. The highest agreement was in India, closely followed by China, while France recorded the lowest rate of agreement at 59%.

5-YEAR TREND

A first-of-its-kind analysis of public sentiment on technology from 2022–2026, revealing dramatic shifts and surprising stability.



71%

of respondents believe tech will play a key role in combating climate change

GLOBAL INDEX

This score has remained unchanged for three consecutive years. However, it has reduced from the highest score recorded, which was 83% in 2023.

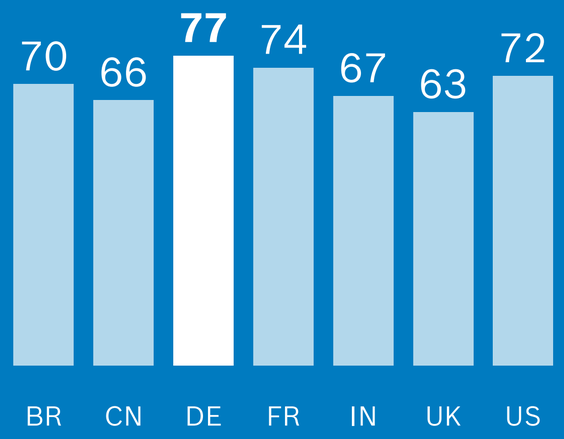
Answers were scaled from 1 to 4. Top-2-Box Results. 2026 N = 11028, 2025 N = 11030, 2024 N = 11264, 2023 N = 11179, 2022 N = 8076. Answers in %.

THE FUTURE OF TECH

HOW INFLUENTIAL WILL AI BECOME?

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

*This page only shows the results for AI. The results for other technologies can be found on page 27.



REGIONAL

Across all countries surveyed, the perceived future relevance of AI was very high. The highest agreement was in Germany, with 77%, and the lowest was the UK, at 63%.

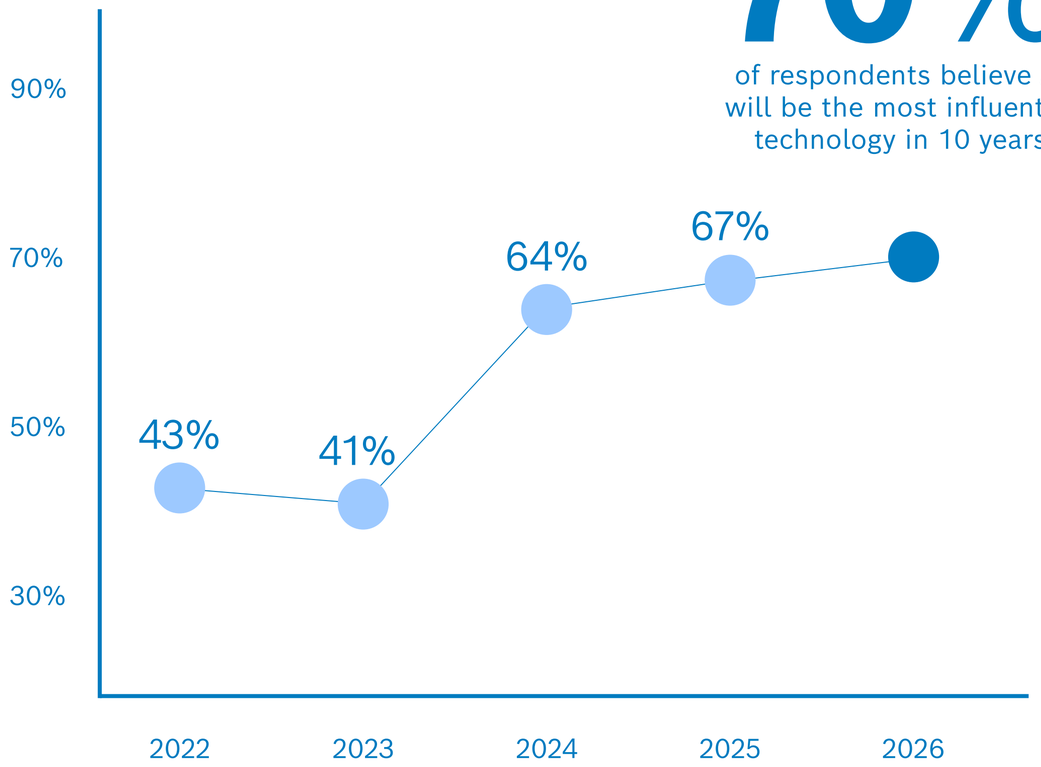
BR N = 2009, CN N = 2002, DE N = 1011, FR N = 1000, IN N = 2002, UK N = 1004, US N = 2000. Answers in %.

5-YEAR TREND

A first-of-its-kind analysis of public sentiment on technology from 2022-2026, revealing dramatic shifts and surprising stability.

70%

of respondents believe AI will be the most influential technology in 10 years



GLOBAL INDEX

In 2022, 43% of respondents believed that AI would be the most influential technology within a decade. That figure decreased slightly in 2023. Since then, AI technology has become much more prevalent. Now, 70% of respondents globally believe that it will be the most influential technology within ten years.

The reported values are based on respondents that know the respective technology. 2026 N = 11028, 2025 N = 11030, 2024 N = 11264, 2023 N = 11179, 2022 N = 8076. Answers in %.

TECH OF THE **FUTURE**

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

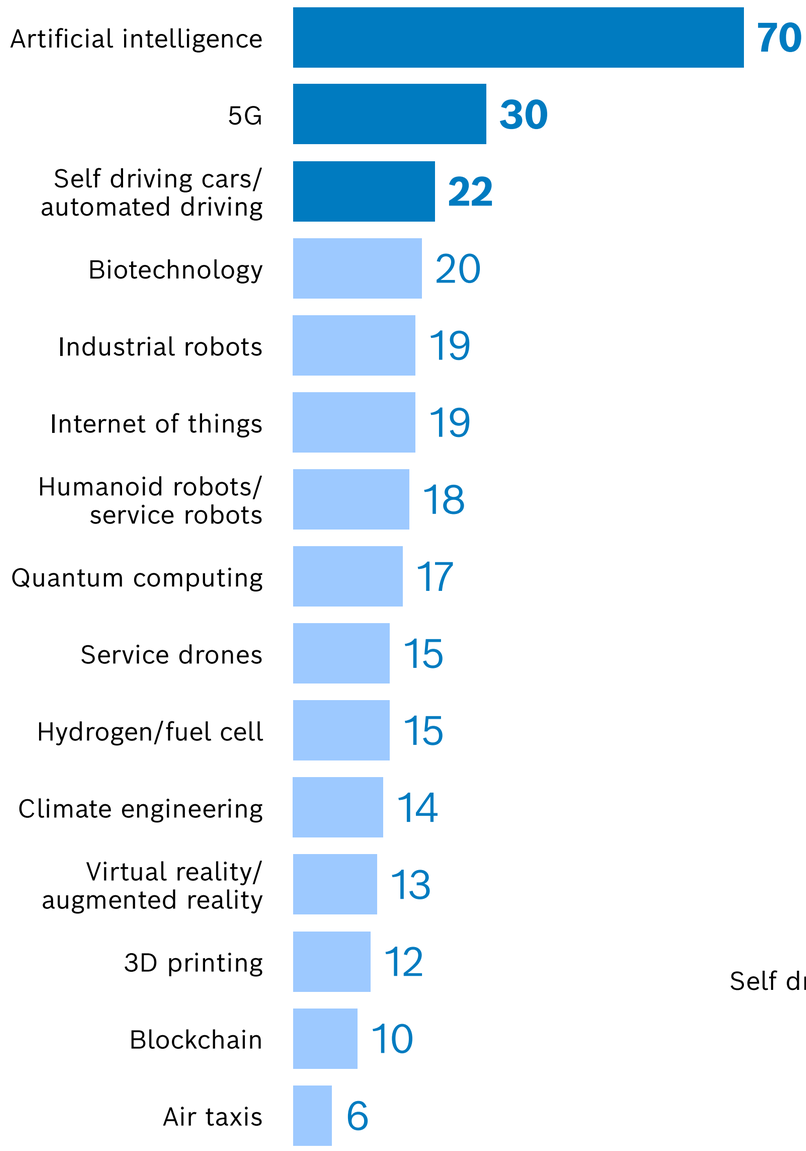
GLOBAL INDEX

Artificial intelligence had a strong lead on 5G, which was followed closely by various other technologies. Blockchain and air taxis ranked the lowest.

REGIONAL

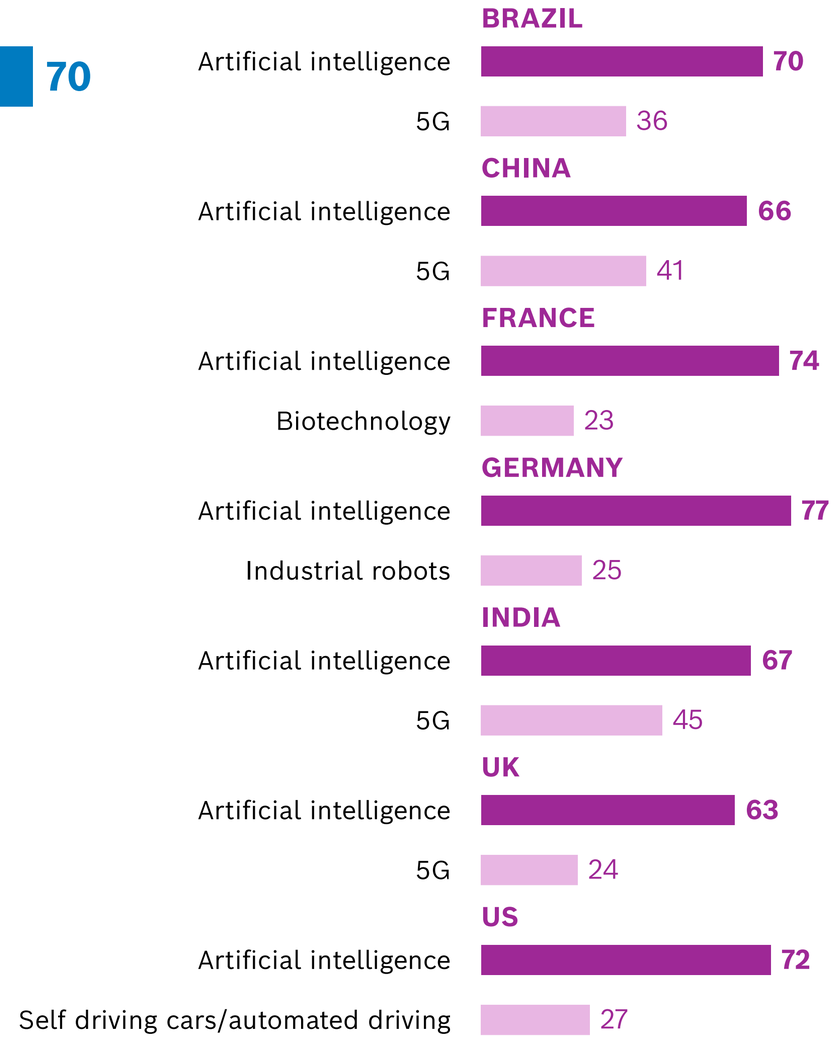
In one of the strongest results in the Tech Compass, AI ranked top in every country, often by a wide margin ahead of 5G. Other technologies that ranked in second place were industrial robots, biotechnology, and self driving cars/automated driving.

GLOBAL INDEX



N = 11028. Answers in %.

REGIONAL TOP TWO



BR N = 2009, CN N = 2002, DE N = 1011, FR N = 1000, IN N = 2002, UK N = 1004, US N = 2000. Answers in %.

HOPES AND FEARS

POSITIVE IMPACT ON SOCIETY

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

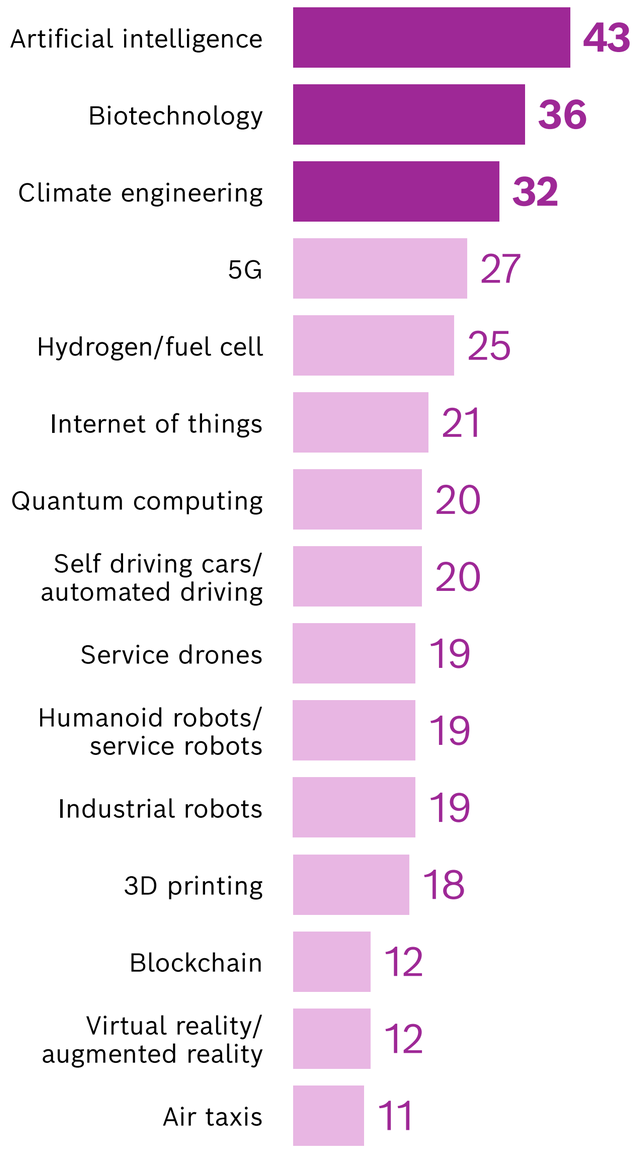
GLOBAL INDEX

Artificial Intelligence ranked top, as it also did when we asked which technologies were the biggest threats to society (see next page). Biotechnology and climate engineering ranked second and third here.

REGIONAL

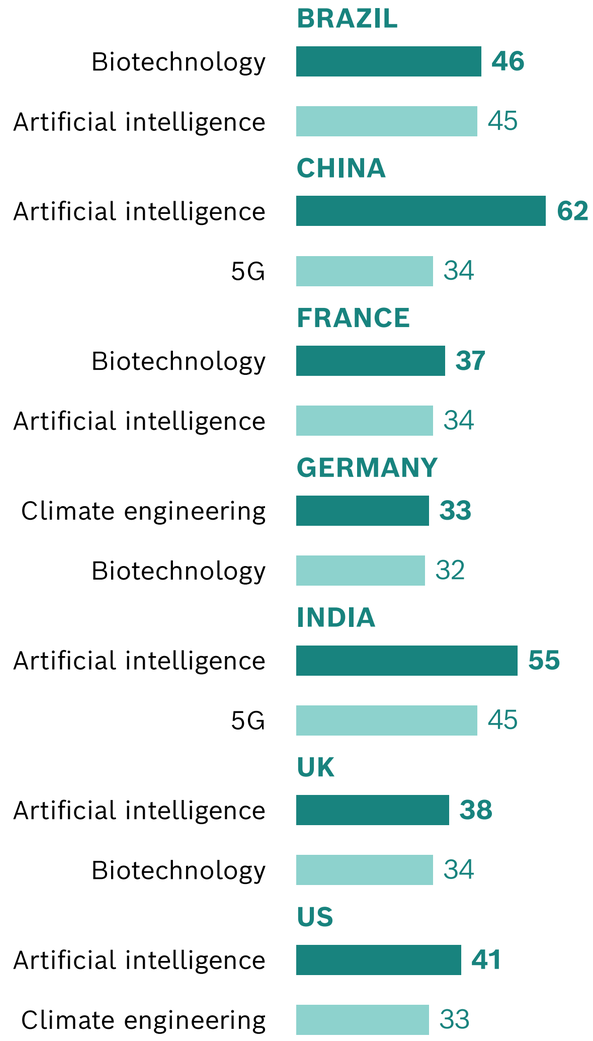
Biotechnology will have the strongest positive impact on society according to Brazil and France, while in China and India 5G technologies were ranked second.

GLOBAL INDEX



N = 11028. Answers in %.

REGIONAL TOP TWO



BR N = 2009, CN N = 2002, DE N = 1011, FR N = 1000, IN N = 2002, UK N = 1004, US N = 2000. Answers in %.

NEGATIVE IMPACT ON SOCIETY

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

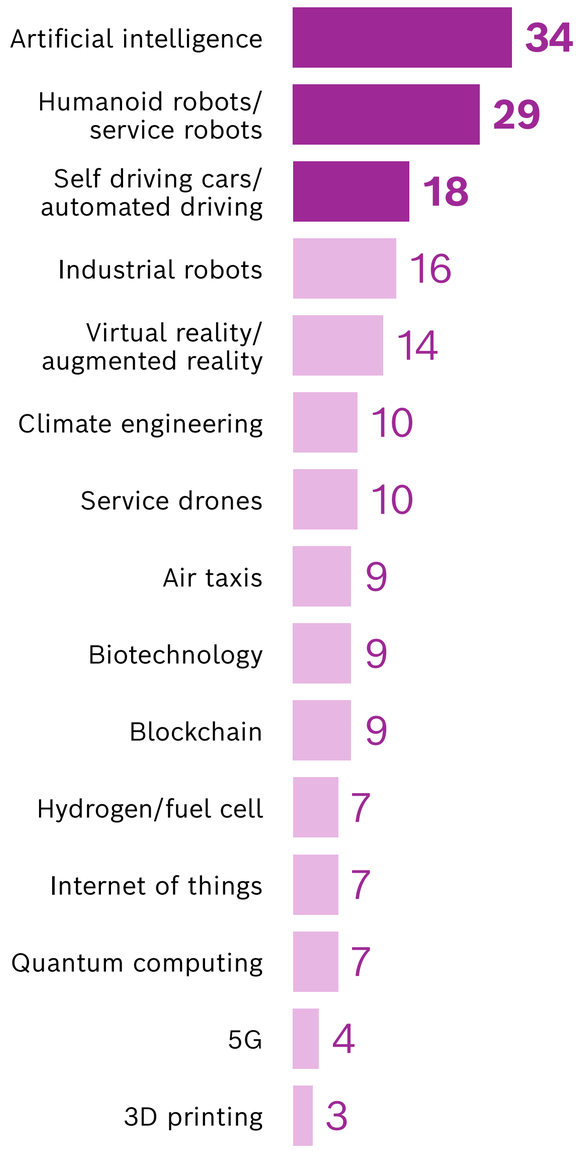
GLOBAL INDEX

As with the previous question, the percentage of people who scored artificial intelligence top remained identical compared to 2025. The duo of humanoid robots and self driving cars also retained their positions from the previous year.

REGIONAL

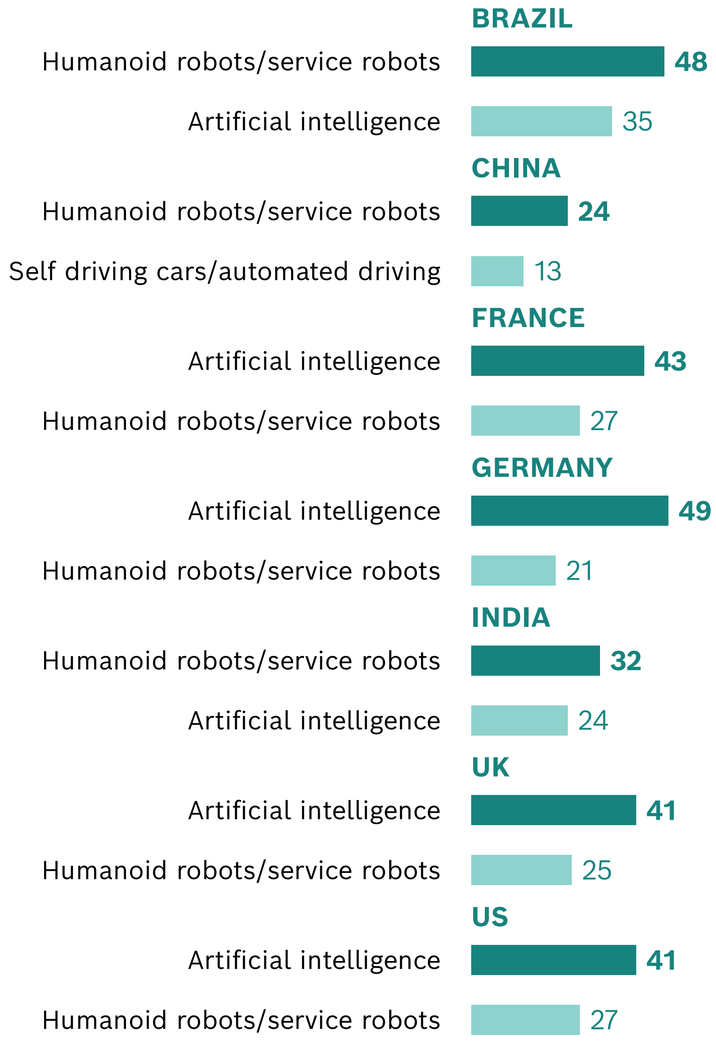
There is a lot of similarity between the technologies chosen by respondents across all countries. China is the only outlier, giving each technology a notably low score.

GLOBAL INDEX



N = 11028. Answers in %.

REGIONAL TOP TWO



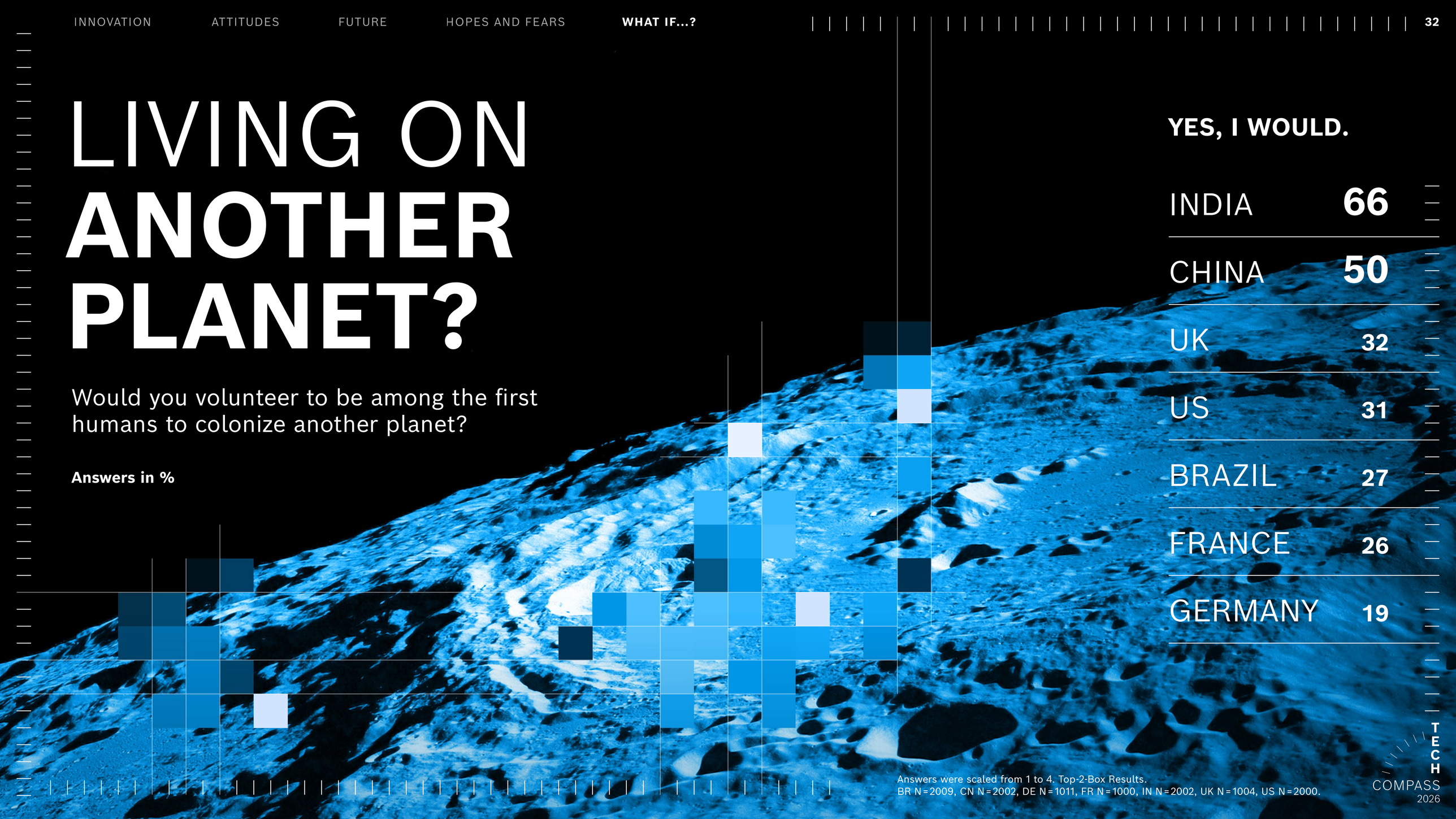
BR N = 2009, CN N = 2002, DE N = 1011, FR N = 1000, IN N = 2002, UK N = 1004, US N = 2000. Answers in %.

WHAT IF...?

LIVING ON **ANOTHER PLANET?**

Would you volunteer to be among the first humans to colonize another planet?

Answers in %



YES, I WOULD.

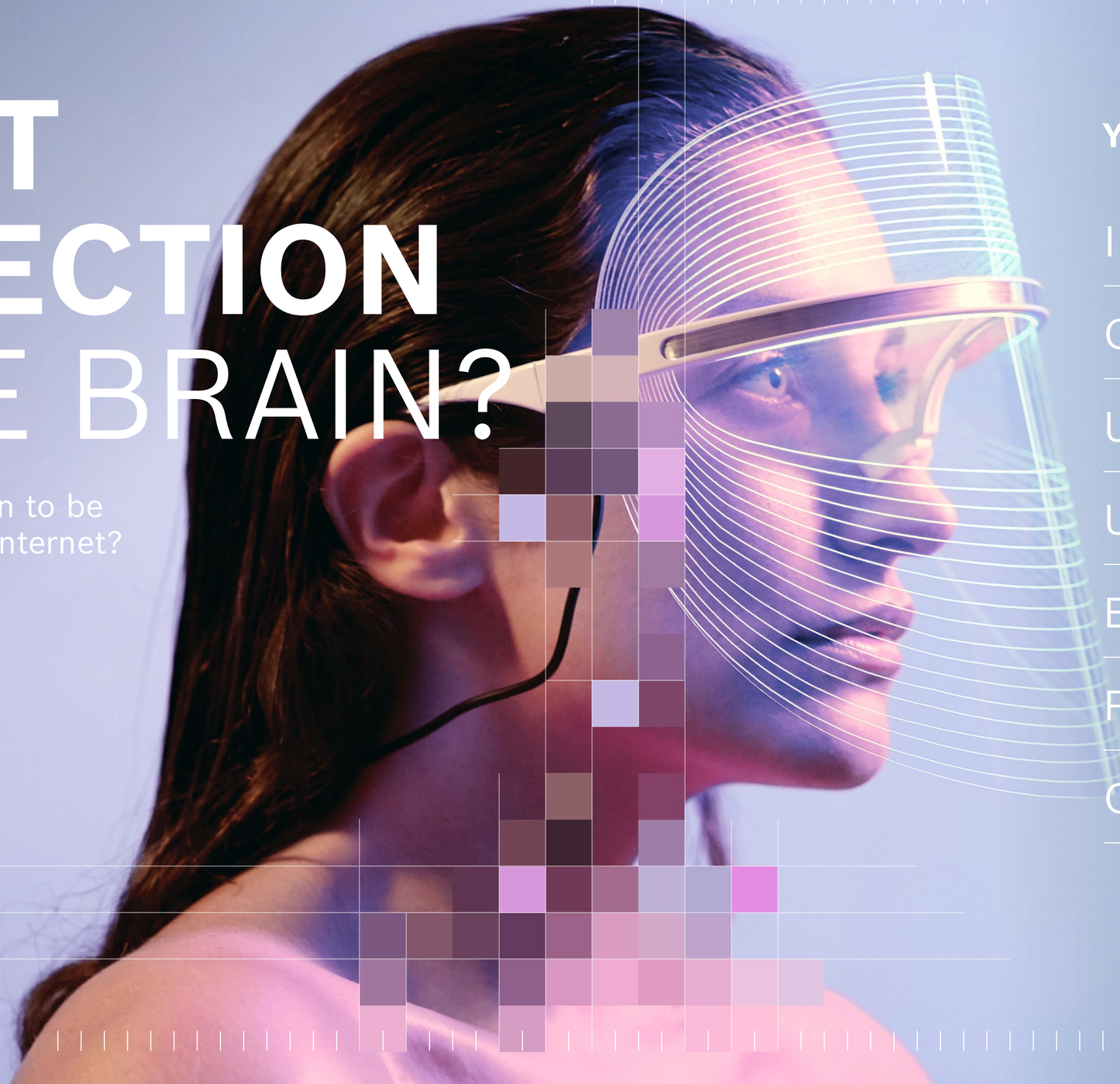
INDIA	**66**
CHINA	**50**
UK	**32**
US	**31**
BRAZIL	**27**
FRANCE	**26**
GERMANY	**19**

Answers were scaled from 1 to 4. Top-2-Box Results.
BR N = 2009, CN N = 2002, DE N = 1011, FR N = 1000, IN N = 2002, UK N = 1004, US N = 2000.

DIRECT CONNECTION TO THE BRAIN?

Would you allow your brain to be directly connected to the internet?

Answers in %



YES, I WOULD.

INDIA	**62**
CHINA	**47**
UK	**30**
US	**25**
BRAZIL	**18**
FRANCE	**18**
GERMANY	**13**

Answers were scaled from 1 to 4. Top-2-Box Results.
BR N = 2009, CN N = 2002, DE N = 1011, FR N = 1000,
IN N = 2002, UK N = 1004, US N = 2000.

YES, I WOULD.

INDIA	**78**
US	**60**
UK	**60**
BRAZIL	**56**
CHINA	**54**
FRANCE	**52**
GERMANY	**52**

ENCOURAGE **BOLD IDEAS?**

Imagine your child had a groundbreaking idea: Would you encourage him/her to skip college to build a startup?

Answers in %

Answers were scaled from 1 to 4. Top-2-Box Results.
BR N=2009, CN N=2002, DE N=1011, FR N=1000, IN N=2002, UK N=1004, US N=2000.

HEALTH FOR DATA?

Would you give up all privacy protections in exchange for completely free healthcare powered by AI?

Answers in %

YES, I WOULD.

INDIA	**62**
CHINA	**45**
UK	**37**
BRAZIL	**30**
US	**29**
GERMANY	**28**
FRANCE	**21**

Answers were scaled from 1 to 4. Top-2-Box Results.
BR N=2009, CN N=2002, DE N=1011, FR N=1000,
IN N=2002, UK N=1004, US N=2000.

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

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

Brazil, China, France, Germany, India, UK, US

August 25 – September 8, 2025

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 US) in August and September 2025 by Gesellschaft für Innovative Marktforschung mbH (GIM) on behalf of Robert Bosch GmbH. In France, Germany and the UK, a minimum of 1,000 people each were surveyed; in Brazil, China, India, and the US, 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, US: 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 to 2026, in each case based on seven countries, is occasionally compared with the index of 2022 which is based on five countries. Calculating a global index for 2023 to 2026 based on the five previous countries provided equivalent results.

COUNTRY	SAMPLE SIZE	SPECIFICS
Brazil	2,009	Age distribution: 18–69 years, regional distribution among 5 main regions
China	2,002	Age distribution: 18–59 years, data collection in Tier 1 + New Tier 1
France	1,000	Age distribution: 18–69 years
Germany	1,011	Age distribution: 18–69 years, regional distribution among 4 main regions
India	2,002	Age distribution: 18–59 years
UK	1,004	Age distribution: 18–69 years
US	2,000	Age distribution: 18–69 years, regional distribution among 7 main regions

AND WHAT DO YOU THINK ABOUT TECH?

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