

The Inverted AI Adoption Map

Why the countries building AI fear it, and the countries using it aren't who you think.

Based on 2025/2026 data from
47 countries & 71,556 respondents.



The Inverted Map: The Builders Trust It The Least

31%

US citizens who trust their government to regulate AI. (Lowest globally, lower than Japan or Hungary).

39%

US citizens who believe AI has more benefits than drawbacks.



The country that trains the frontier models and employs the researchers is the most pessimistic on Earth. US sentiment sits at roughly half the optimism of the Global South.

Infrastructure is Downstream of Mandate

Emerging Markets

India, China, UAE, Indonesia.

>80% regular workplace AI use.

Western Markets

US, Germany.

35% - 60% regular workplace AI use.

India shows **85-90%** institutional support/mandate for AI.

The assumption that emerging markets lag due to infrastructure is wrong. Where corporate mandates push AI into workflows, workers use it heavily. Institutional mandate beats individual curiosity.



Optimism and Anxiety Scale Together

Excitement

Is this useful to me?
(Global benefits perception rose 55% to 59%)

Waa!

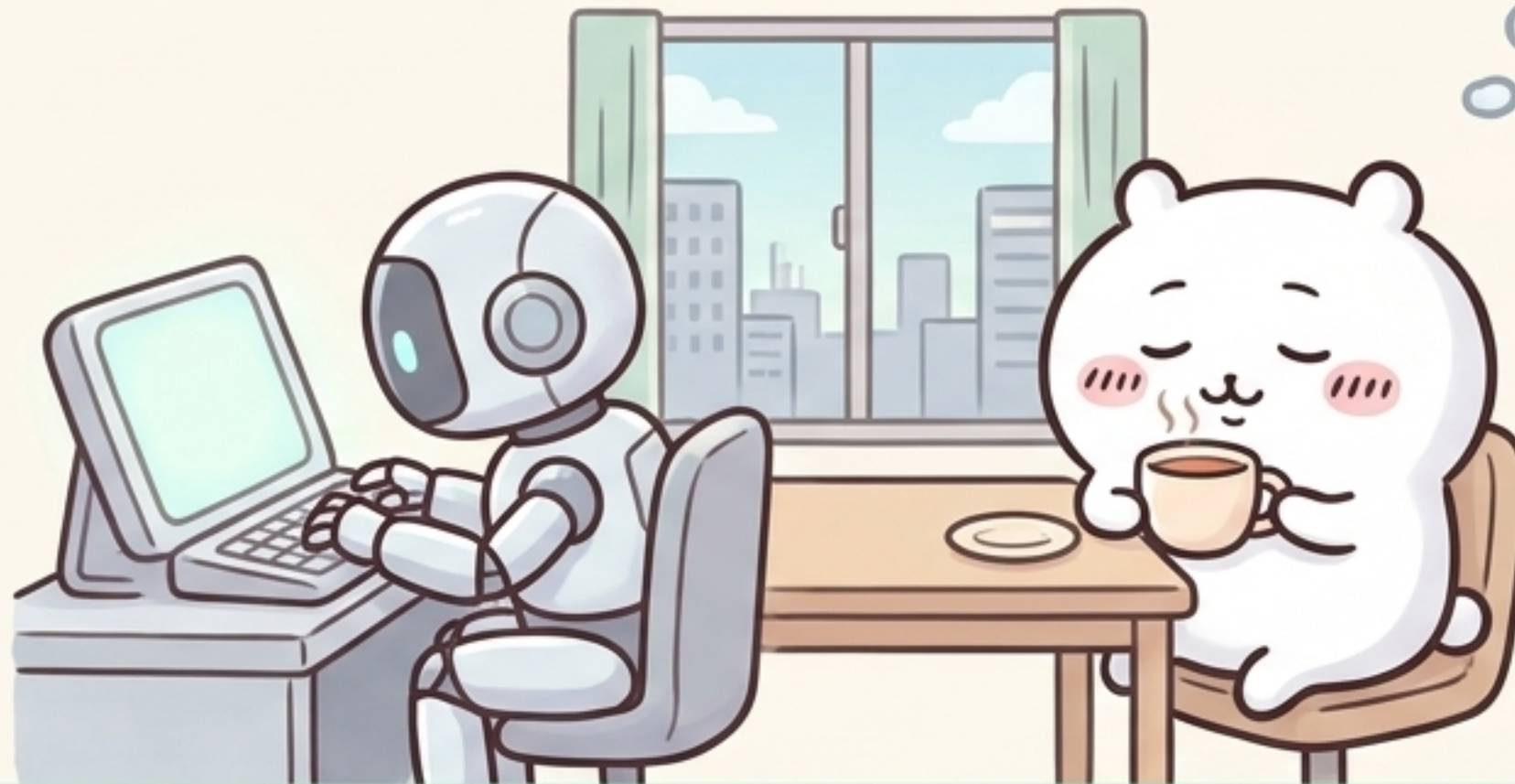
Anxiety

Will this go badly at scale?
(Global nervousness rose 50% to 52%)

India YoY Shift:
Nervousness (+14 pts)
outpaced Excitement (+2 pts).

India has the fastest-growing workplace AI use and the fastest-growing anxiety. Users are getting smarter, holding two true beliefs at once: the tool is highly useful personally, and the macro-implications are terrifying.

Japan's Path: The Disengaged Baseline



Low Excitement: ~46%

Low Nervousness: ~25%

Trend:
Completely stable
across years.

Japan is the only major **outlier** that moves differently. The population is neither skeptical nor hyped; they are simply **disengaged**. When a population lacks strong feelings about AI, they are either totally adapted to it, or too far **removed to notice**.

Builders and Users Are Watching Different Movies



Impact on Jobs

Experts 73% Positive |
Public 23% Positive

Impact on Economy

Experts 69% Positive | Public
21% Positive

Job Loss Expectation

64% of public expect fewer jobs
(only 5% expect more).

The people building AI products optimize for a reality their users don't share. If you build for your own Silicon Valley intuition, you calibrate to the global 10th percentile of enthusiasm. The trust deficit will widen before it narrows.