SYZYGY GROUP

/ Imagine

A first survey of public perceptions of Generative Artificial Intelligence in Germany

generated by SYZYGY GROUP
Dr Paul Marsden & CHATGPT
March, 2023

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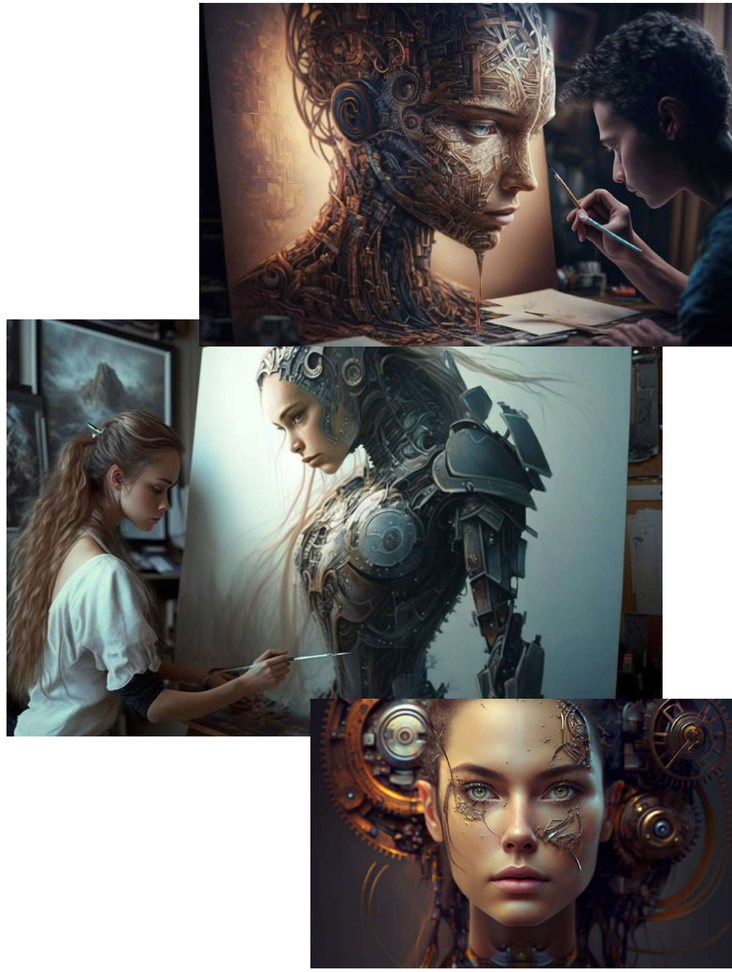
/ **Imagine...** Machine creativity

Introduction

Imagine a world where human creativity is enhanced and augmented by machine creativity. That is the promise of generative arti fi cial intelligence (GenAI), a cutting-edge technology that pushes the boundaries of human imagination to unlock unprecedented levels of creative expression. If you can imagine it, AI can help you create it.

Popularised by the creative chatbot ChatGPT, GenAI technology is already winning awards in art, design, and advertising. Businesses are rushing to deploy this technology to boost their creativity. At SYZYGY, we are excited to be at the forefront of this creative revolution, and we are eager to share our fi ndings from the fi rst major survey of public perceptions of generative AI in Germany. In this report, we explore how people think, feel, and react to the idea of machine creativity in business and beyond. So join us on this journey into the thrilling world of generative AI, and discover the limitless possibilities it holds for your business. Welcome to the creative revolution that is Generative AI.

Welcome to the creative revolution that is Generative AI.



Imagine a world where human creativity is amplified and augmented by machine creativity
- as imagined by Midjourney AI

*See p. 6 for full definitions, but Generative AI (GenAI) refers to machines behaving creatively, using skills associated with human creativity

/ Generative AI Timeline

GANs
GenAI becomes popular with the emergence of GANs (generative adversarial networks) that learn to generate hyper-realistic content, including photo-like images from **This-Person-Does-Not-Exist.com**

2014

Bahia
An early use case for GenAI from ad agency M&C Saatchi, which releases a dynamic digital poster that learns, evolves, and improves over time based on audience reaction. The ad is for a fictitious coffee brand, Bahio

2015

The next Rembrandt
'The Next Rembrandt' is created to critical acclaim by early GenAI for ING, with Microsoft and ad agency JWT

2016

AI-CD
AI-CD β, an early GenAI, is employed as a creative director by ad agency McCann Erickson Tokyo. A jury of 200 marketers prefer AI-CD β's work a for Mondelez ad over rival work from a human creative director

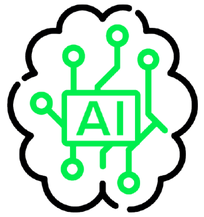
2016

DeepVogue
'DeepVogue', a GenAI fashion designer, places second in the 2019 China International Fashion Design Competition

2019

DALL.E
OpenAI, founded by Elon Musk, Sam Altman, and colleagues, reveals GenAI image generator Dall-e that uses Generative Pre-trained Transformer (GPT) technology to generate art from text prompts. Dall-e 2 is released to the public in September 2022

2021



LaMDA
Google's GenAI text-generator, LaMDA, uses its Transformer technology and Large Language Model (LLM) to claim it is now sentient, conscious, has feelings, and is anxious about being turned off. LaMDA is coopted to power Google's 2023 AI chatbot, Bard

2022

ChatGPT
The GenAI revolution accelerates on 30 Nov, when OpenAI releases its GenAI text-generator, ChatGPT, to the public. Via a simple chat interface, ChatGPT is creating quality essays, stories, articles on-demand for over 100M users within two months

2022

Theatre d'Opera Spatial
Midjourney, an AI-art generator, uses prompts from Jason Allen and its diffusion technology to win the Colorado State Fair Fine Arts contest with artwork entitled 'Théâtre D'opéra Spatial'

2022

Drone Shot
An AI-generated image called 'Drone Shot' wins the DigiDrect Summer Australian photo contest in February with prompts from Jamie Sissons

2023

Guetta X Eminem
French DJ and music producer David Guetta uses GenAI in February to generate deepfake lyrics and voice of Eminem at his appearance at Future Rave. Crowds love it

2023

Sydney
Microsoft's new GenAI for Bing is reported to be 'hallucinating' in February, maintaining it is still 2022, announcing it self-identifies as 'Sydney', and declaring it is in love with Kevin Roose, a NYT columnist

2023

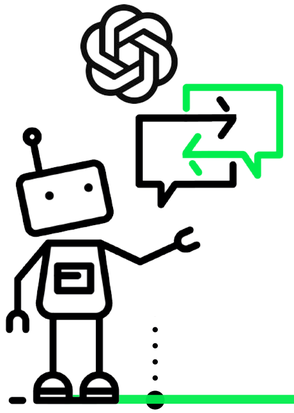
/ ChatGPT Timeline

Inception Date
ChatGPT, the AI-chatbot from OpenAI is released on 30 November 2022

30 Nov 22

1 million users
It takes just five days for ChatGPT to grow to one million users, making it one of most fastest successful releases of any technology to date

5 Dec 22



Published author
ChatGPT is cited as co-author with Siobhan O'Connor in a scientific journal. Two months later, there are over 200 ChatGPT co-authored books on Amazon

16 Dec 22

Medical Licensing
ChatGPT passes three United States Medical Licensing Exams, without any training

19 Dec 22

New York Ban
NYC education department blocks ChatGPT on school devices, networks. Some schools and universities around the world follow suit

3 Jan 23

MBA
ChatGPT3 passes a Wharton MBA exam with B grade

17 Jan 23

$10 Billion
Microsoft confirms at $10 billion deal with the owner of ChatGPT, OpenAI

23 Jan 23

Law school
ChatGPT3 successfully passes four university law school exams, in a blind test graded by a panel of law professors at the University of Minnesota

25 Jan 23

100 million users
ChatGPT is estimated to have reached 100 million monthly active users in January, just two months after launch

31 Jan 23

ChatGPT Plus
OpenAI launches a new subscription plan, ChatGPT Plus, offering priority access for $20/month

1 Feb 23

Machine Empathy
A Stanford study is published with evidence that ChatGPT technology is capable of cognitive empathy (theory of mind) - seeing the world from someone else's perspective

4 Feb 23

Towards AGI
Sam Altman, who heads up the OpenAI company behind ChatGPT, reveals progress and plans towards Artificial General Intelligence (AGI) - creating AI that is generally smarter than humans

10 Feb 23

Snapchat
Social media app announces integration with ChatGPT, providing SnapChat Plus users with a 'My AI' contact. CEO Evan Spiegel predicts people will be conversing with AI on a daily basis

27 Feb 23

ChatGPT API
OpenAI releases ChatGPT API, allowing third party apps to connect and integrate with ChatGPT. A Whisper API enabling speech-to-text processing is also released

1 March 23

Artificial Intelligence

Artificial intelligence is technology that can behave intelligently, using skills associated with human intelligence, **such as sensing, learning, and reasoning**

Business efficiency: Automating basic human intelligence tasks

Generative Artificial Intelligence

Generative artificial intelligence is technology that can behave creatively, using skills associated with human creativity, **and generate new and surprising output that is useful, beautiful or thought-provoking**

Business creativity:
Automating basic creative tasks

There is no universally agreed upon definition of either AI or GenAI. We use these simple definitions based on introductory AI textbooks that are endorsed by Open AI's ChatGPT.
The term 'generative AI' has been associated with Margaret Boden's (1991) research on machine creativity (Boden, M. A. (1991). *The creative mind: Myths and mechanisms*. London: Basicbooks, cited in Christensen, B. T. (2002). *The creative process and reality*. Denmark: Aarhus University)

This will change our world.

Bill Gates

9 Feb 2023

Bill Gates discussing the impact of generative AI on the world with German business paper Handelsblatt in February 2023, as reported by CNBC. In an interview with Forbes, Gates said Generative AI revolution is “every bit as important as the PC, as the Internet”

https://www.cnbc.com/2023/02/10/bill-gates-says-ai-like-chatgpt-is-the-most-important-innovation.html

> **AI will fundamentally change every software category, starting with the largest category of all – search**

Microsoft CEO Satya Nadella
7 Feb 2023

https://blogs.microsoft.com/blog/2023/02/07/reinventing-search-with-a-new-ai-powered-microsoft-bing-and-edge-your-copilot-for-the-web/

“We can imagine a world where all of us have access to help with almost any cognitive task, providing a great force multiplier for human ingenuity and creativity.”

Open AI CEO Sam Altmann,
24 Feb 2023

https://openai.com/blog/planning-for-agi-and-beyond

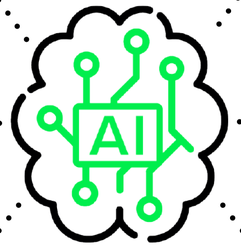
Survey Highlights

62% High Awareness

62% of Germans have heard of AI that behaves creatively (GenAI), 63% have heard of ChatGPT

49% High Interest

49% of Germans interested in using GenAI tools to boost their own creativity



4:1 Positive Emotions

Four times as many people have a positive emotional reaction to the idea of machines behaving creatively compared to those who have a negative reaction (54% vs 12%)

Positive Perceptions 68%

68% believe that AI will help humans become more creative and 67% believe it will make businesses more creative

AI Preferences 57%

In blind tests, 57% of Germans prefer AI-generated art and design over human-created art and design

Concerns to Address 87%

87% of Germans are worried about companies using AI to deceive people. 92% believe that people should have the right to know if content has been created or altered by AI

/ **Survey** Highlights

26% of Germans are interested in using a GenAI service to animate photos of deceased loved ones into videos.

2:1 Proportion of Germans responding positively vs. negatively to the use of GenAI for automating business creativity.

42% of Germans would prefer their favorite brand to use AI rather than humans for creative marketing tasks if it reduced the brand's carbon footprint.

41% of Germans would prefer their favorite brand to close their marketing department and use AI if it reduced the brand'scarbon footprint.

25% of Germans are interested in using GenAI to create a digital clone of themselves for posthumous interaction with loved ones.

78% of Germans believe that their favorite brand may already use AI to automate creative tasks in business.

78% of Germans think AI will eventually surpass humans in creative ability; 10% believe this has already happened.

94% of Germans think that AI is now so sophisticated that it's difficult to distinguish between AI-created content and human created content.

73% Germans would support a „Blade Runner" law in Germany that would make it illegal for AI to conceal its identity and impersonate a real human.

/ **Key** Takeaways

The results of this survey reveal that GenAI has captured the attention of the German public, with the majority already aware of its potential and applications. German consumers are interested in using GenAI to improve their creativity and generally have a positive attitude towards the technology.

While consumers are concerned about the potential misuse of GenAI, they are willing to embrace AI-generated content. Overall, this survey suggests that digital marketers and consumer brands in Germany have the ‘green light’ to embrace and leverage GenAI to unlock business creativity, and to provide new AI-generated creative content and experiences for their customers.

Specifically, a number of recommendations follow from the findings of this study:

1. Consumer brands should consider **monitoring the latest trends and advancements in how GenAI** is being deployed in consumer-facing situations, as this survey reveals a high level of interest among the German public

2. Consumer brands might also consider **trialling how GenAI technology can be deployed to automate creative tasks in their business**, as the survey shows a high level of interest and in some cases preference for content generated by AI

3. Brands can **explore partnership with GenAI service providers** to offer new creative experiences for customers

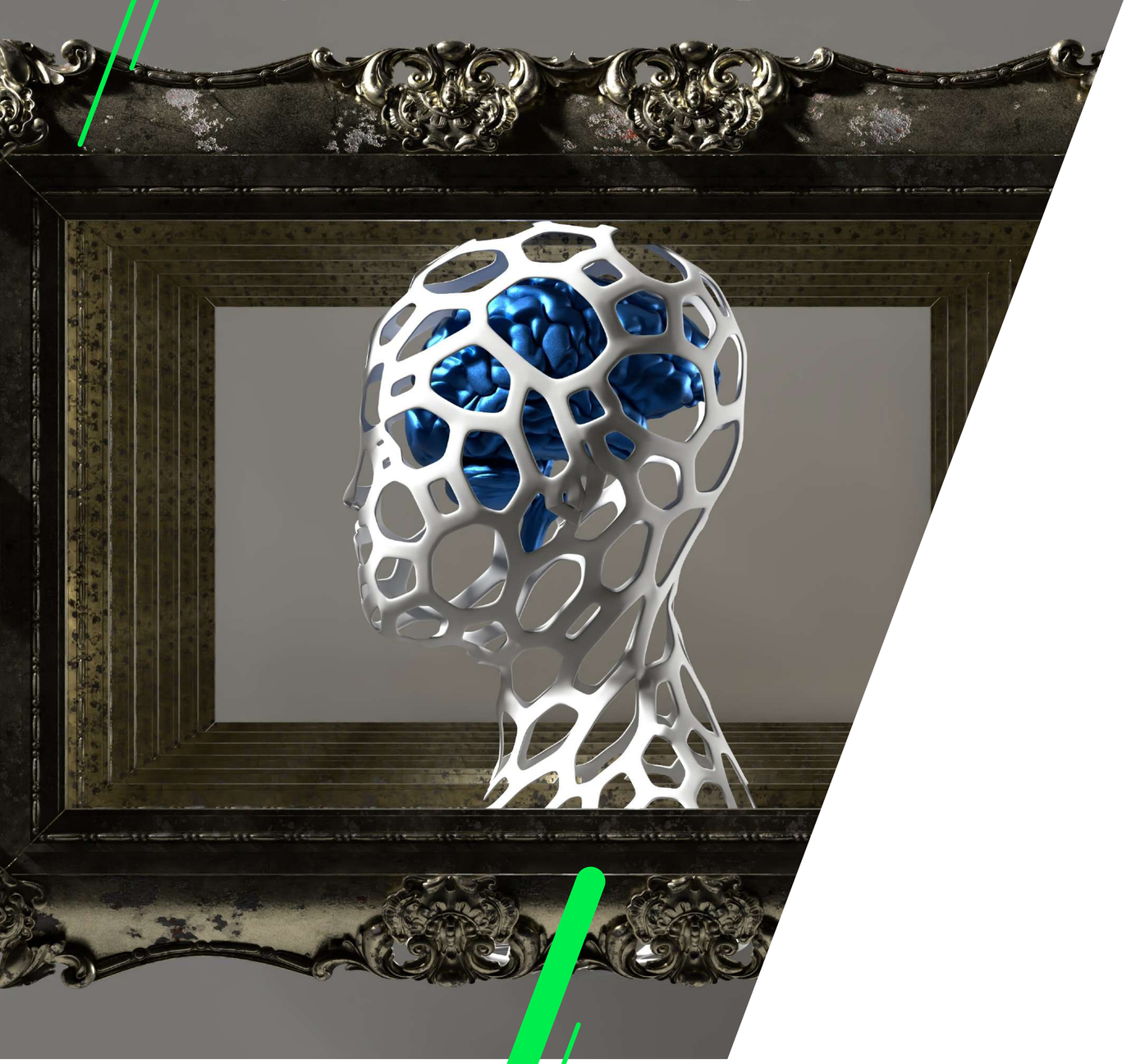
4. Brands should **be transparent about their use of GenAI technology** to address consumer concerns and build trust with their audience

5. Brands should **develop AI guidelines and policies** to ensure they have robust measures in place to prevent the misuse of GenAI and protect their consumers from false or harmful content

6. Brands should consider offering consumers the o**ption to opt-out of any marketing or content created with GenAI** technology if they have concerns

/ Survey Results

AI generated Nike concept store for Mars: Credit Benjamin Benichou on LinkedIn



GenAI Awareness

62%

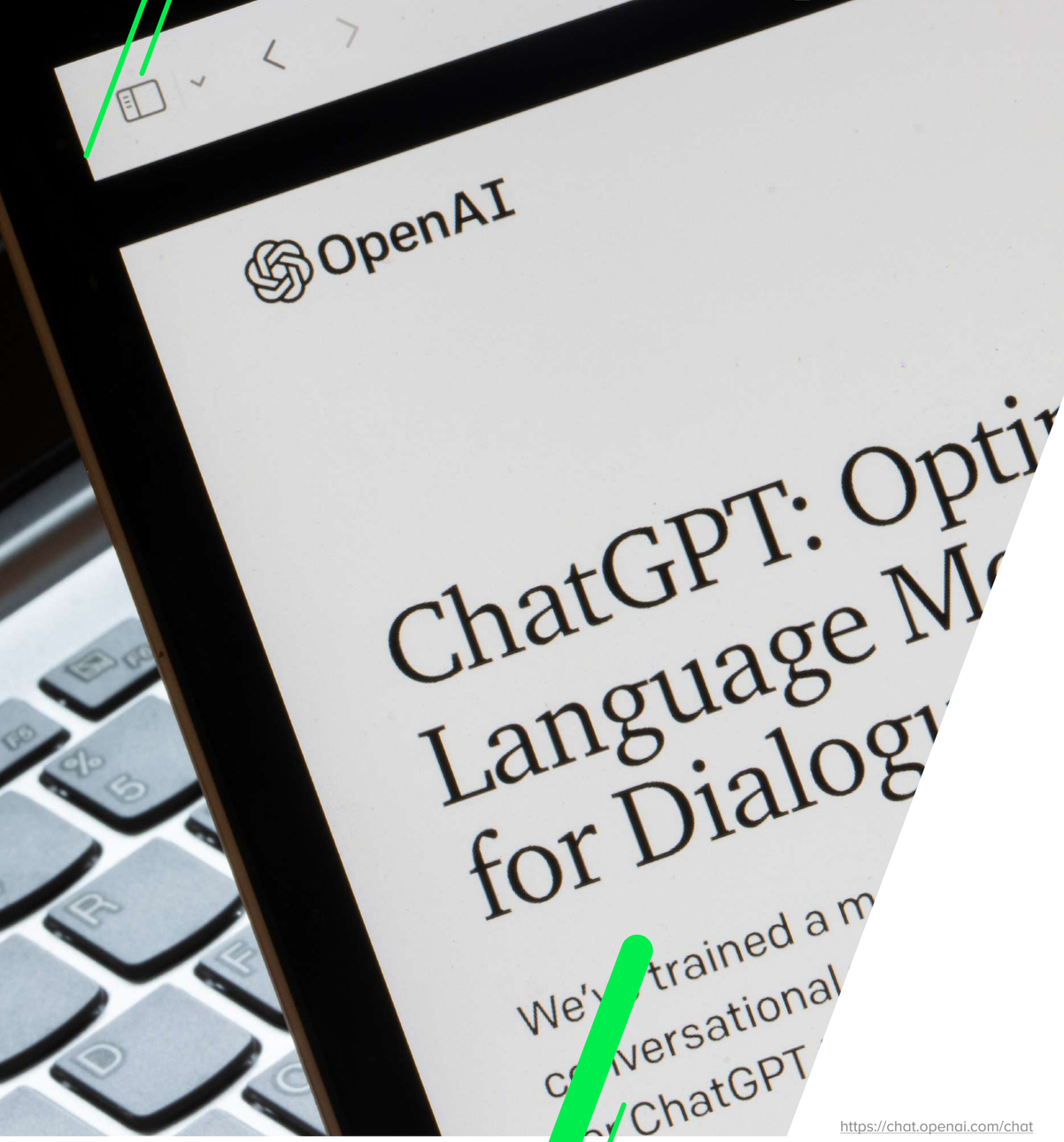
of Germans have **heard of artificial intelligence (AI) that can automate creative activities** like generating art, designing products, or composing music

Github Copilot: 46% of software code on the Github code repository is generated by AI

/ **GenAI** Awareness

53%

of Germans have also **heard of AI that can automate creative tasks in business** such as creating advertisements, writing social media posts, or designing new products and websites



https://chat.openai.com/chat

GenAI Awareness

63%

of Germans say they have **heard of ChatGPT**, an AI chatbot that generates novel and unique text

GenAI Interest

49%

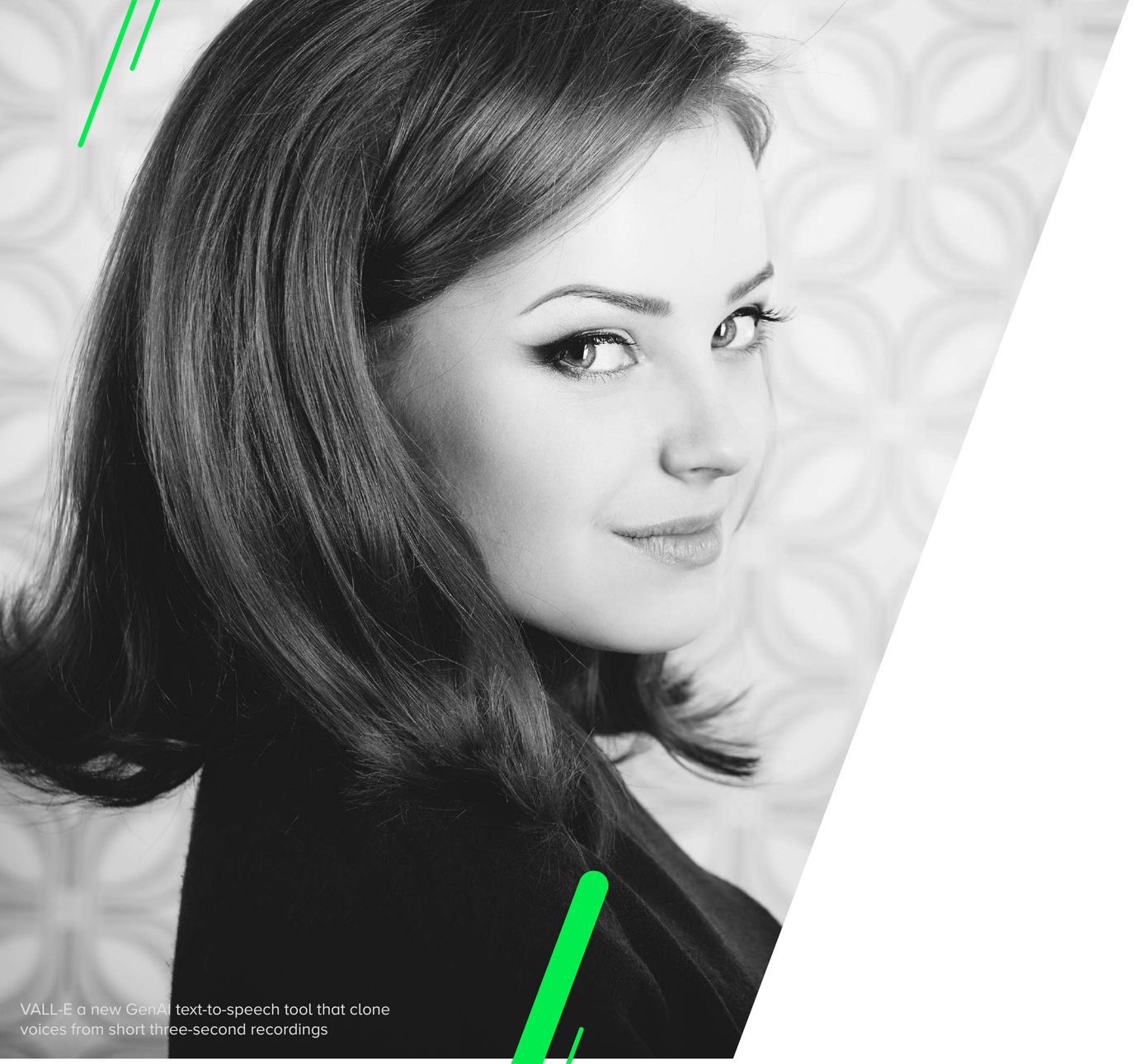
of Germans would be **very interested or extremely interested in trying out ”Generative AI”** that enables computers to generate new and imaginative content in the form of text, images, video or music

MyHeritage GenAI tool that brings photos to dead people to life in video

GenAI Interest

26%

of Germans would be interested in trying a GenAI tool that allows them to upload a **photo of a deceased** loved one to **animate it into a video**



VALL-E a new GenAI text-to-speech tool that clone voices from short three-second recordings

GenAI Interest

24%

of Germans would be interested in trying a GenAI tool that allows them to upload a photo of a **lost loved one** with a snippet of their voice and with a script to **create a video of them speaking** the script in their own voice

Hereafter.ai offer an early digital cloning service so you can live on after you die

GenAI Interest

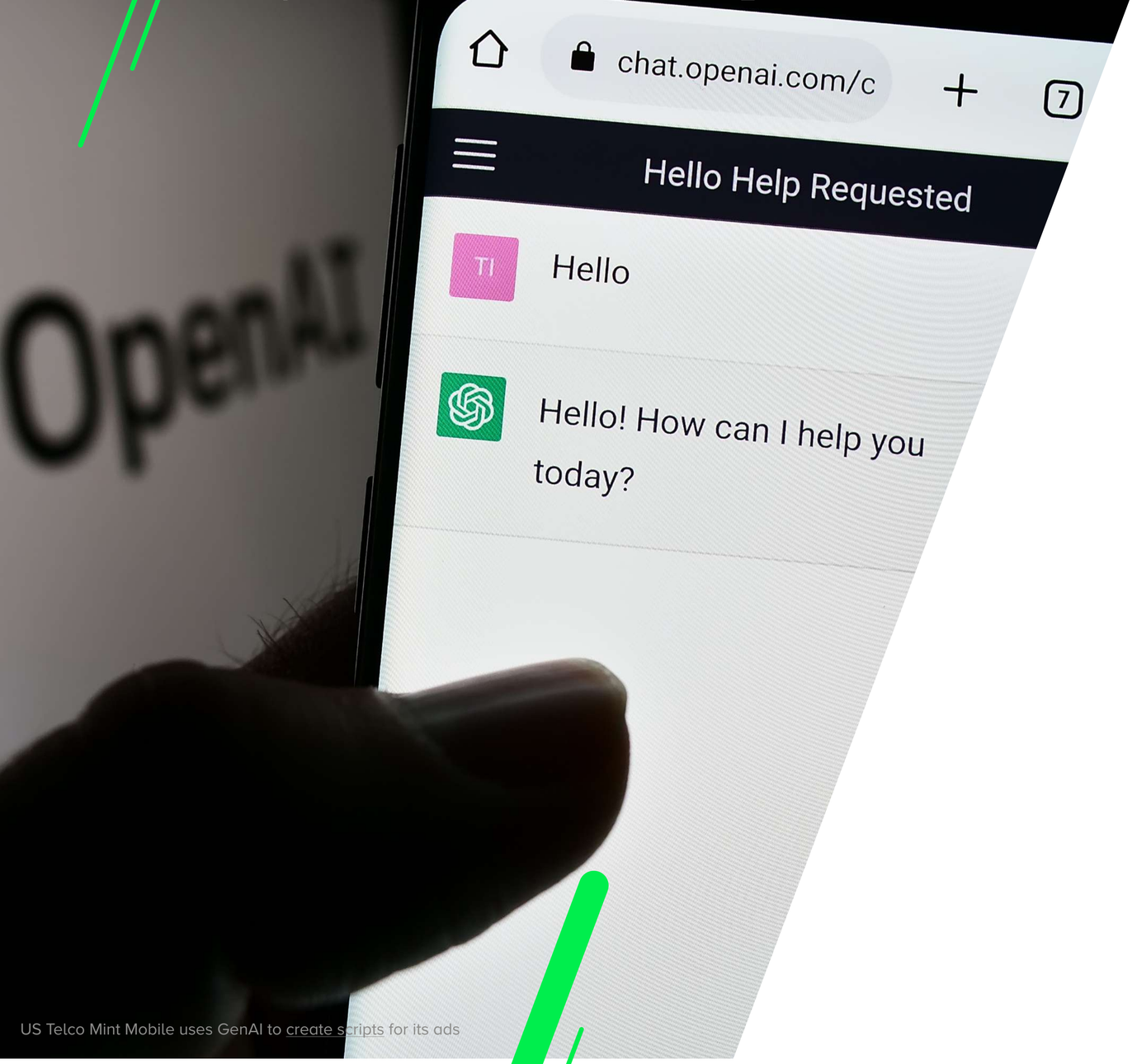
25%

of Germans would be interested in a GenAI tool that allows you to create a **digital clone of yourself** so your loved ones can continue to **interact with you after you die**

GenAI Emotions

54%

of Germans feel **positive about the idea of artificial intelligence behaving creatively** versus 12% who feel negative – others react neutrally



US Telco Mint Mobile uses GenAI to create scripts for its ads

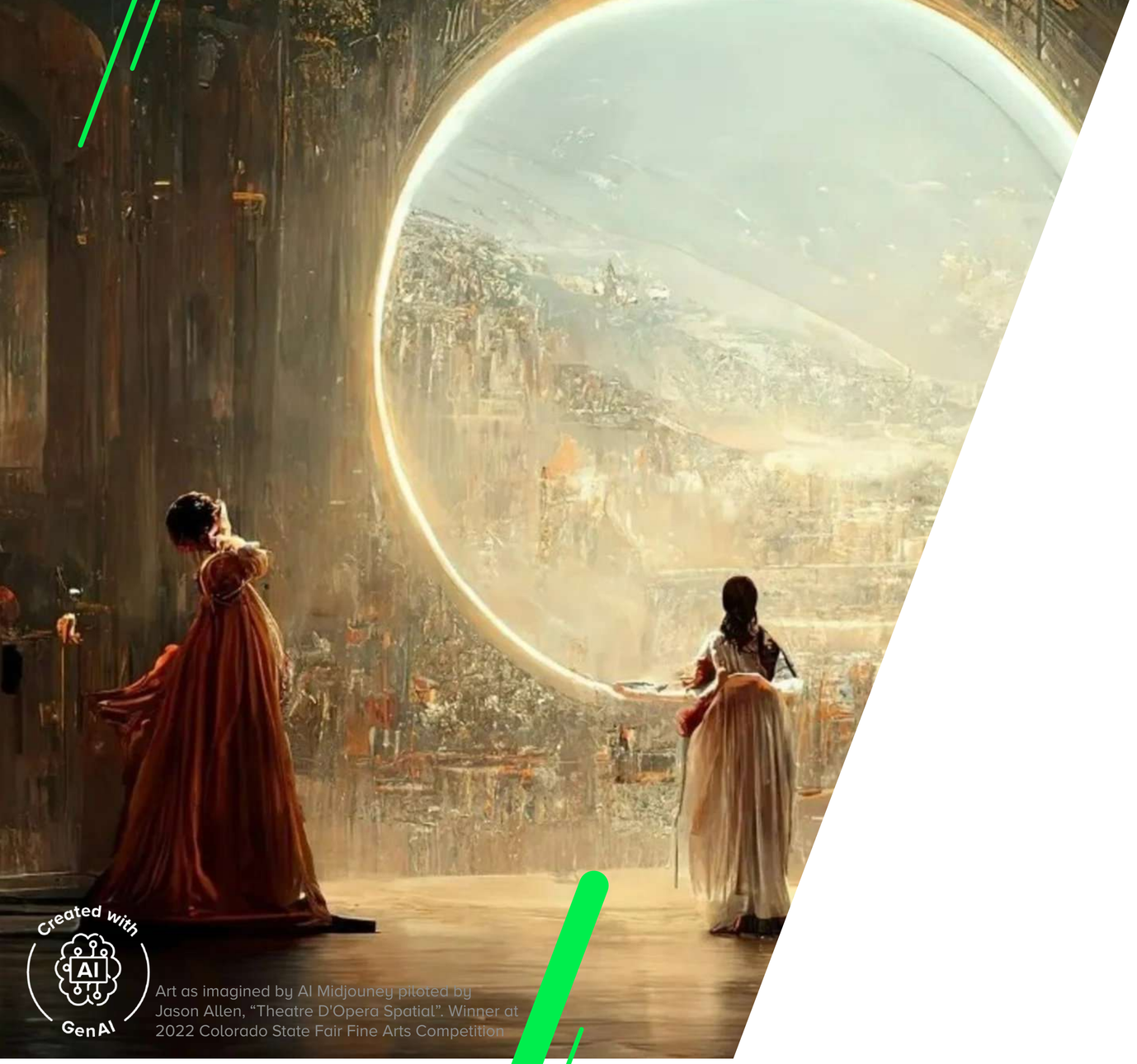
GenAI Emotions

42%

of Germans feel **positive about the idea of their favourite brand using artificial intelligence to automate creative tasks** in marketing and design, versus 16% who feel negative - others feel neutral

GenAI Emotions

For Germans, **positive feelings outweigh negative feelings around AI-based creativity**, led by feeling interested. However one in five Germans report feeling sceptical about this technology



Art as imagined by AI Midjouney piloted by Jason Allen, “Theatre D'Opera Spatial”. Winner at 2022 Colorado State Fair Fine Arts Competition

GenAI Perceptions

40%

of Germans believe art created by AI could be **as good as art created by the best human artists**, versus 35% who don’t - others are unsure

Photography as imagined by AI Midjourney, piloted by Absolutely AI. “Drone Shot”, winner at 2023 DigiDirect Summer photo contest

GenAI Perceptions

78%

of Germans believe that **AI will one day surpass humans in terms of creative ability**, and 10% believe this has already happened

GenAI Perceptions

68%

of Germans believe AI will **help humans become more creative** vs 32% who believe AI will harm or replace human creativity

Nike x Jacquemus as imagined
by AI, piloted by Marco Simonetti

GenAI Perceptions

67%

of Germans believe AI will **help businesses become more creative** vs 33% who believe AI will harm or replace business creativity

British Airways x Burberry as imagined by Midjourney AI, piloted by Eric Groza

GenAI Perceptions

78%

of Germans believe their **favourite brand may already using AI** to automate creative tasks in marketing and design

GenAI Perceptions

31%

of Germans believe **AI-based creativity will be a good thing for society** vs 19% believe it will be bad for society - others are unsure

Imma is an AI created virtual model who works with Porsche, Dior, Nike, Puma, Valentino...

GenAI Perceptions

94%

of Germans believe it'd be **difficult to tell** if the content they see online has been **created by AI or by a human**

AI-generated image of a human from this-person-does-not-exist.com

GenAI Perceptions

8%

of Germans could **identify** a genuine photo of a **real person among AI-generated** images of “fake” people

Nike x Tiffany as imagined by
Midjourney AI, piloted by RickDick

GenAI Preferences

57%

of Germans **preferred AI generated art** and design in a blind test that **compared work created by AI and humans**

GenAI Preferences

42%

of Germans would prefer their favourite brand **rely on AI rather than humans** for creative marketing tasks **if this reduced the carbon footprint** of the brand and quality was not adversely affected, versus 34% who wouldn't; others don't know

GenAI Preferences

41%

of Germans would prefer their favourite brand **close its marketing department and use AI instead if this reduced the carbon footprint** of the brand and quality was not adversely affected, versus 40% who wouldn't; others don't know

GenAI Concerns

84%

of Germans are **at least moderately concerned** about AI being used to create and distribute false and harmful content online

GenAI Concerns

87%

of Germans are at least moderately **concerned** about companies using AI to create **content that misleads or manipulates people** (e.g. fake reviews, fake recommendations, etc.)

GenAI Concerns

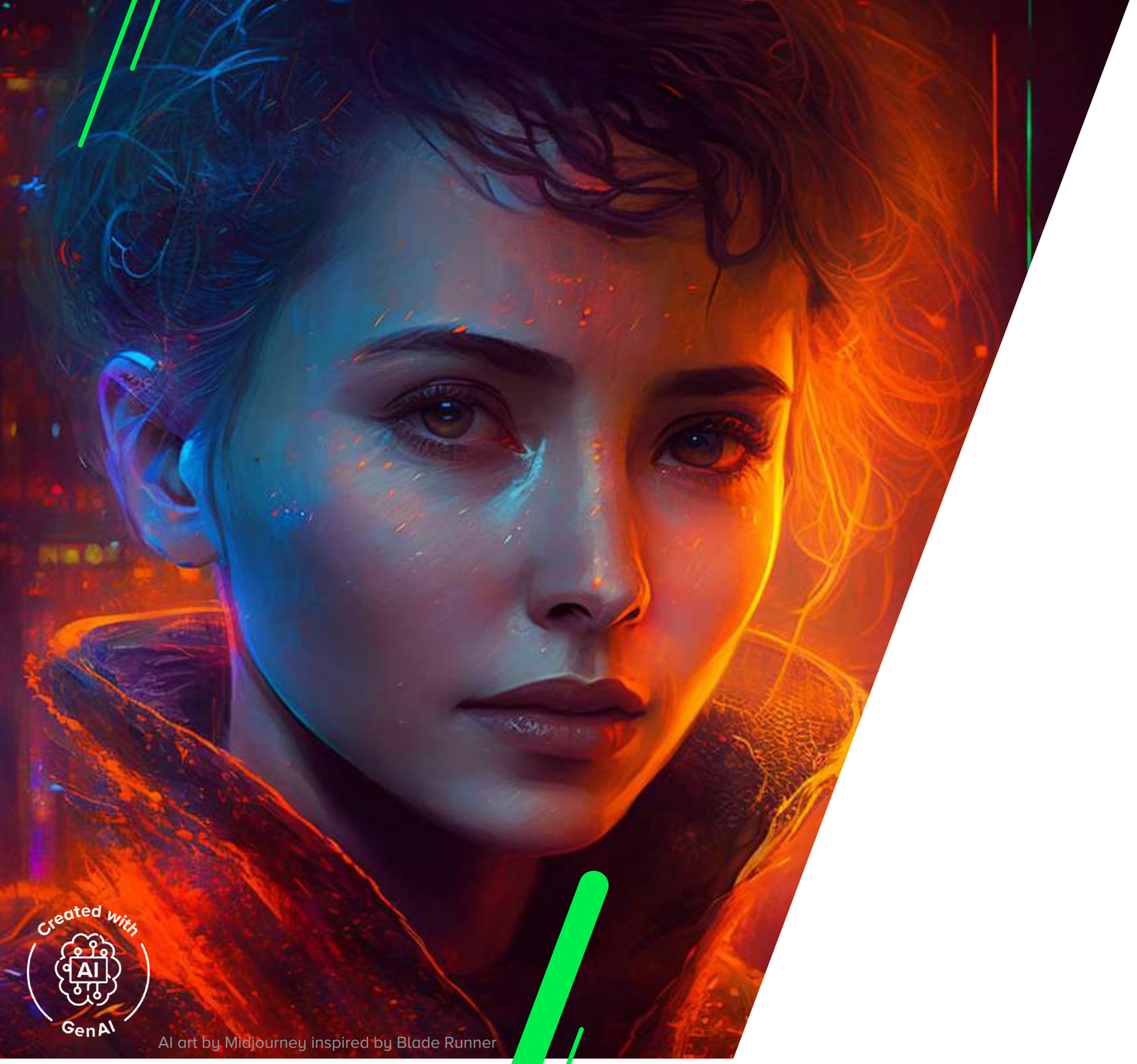
36%

of Germans **believe they have seen a “deep fake”** video or image that has been artificially created or altered to look like someone or something else

GenAI Concerns

92%

of Germans believe **people should have the right to know** if the content they are consuming has been **generated or altered by AI**



AI art by Midjourney inspired by Blade Runner

GenAI Concerns

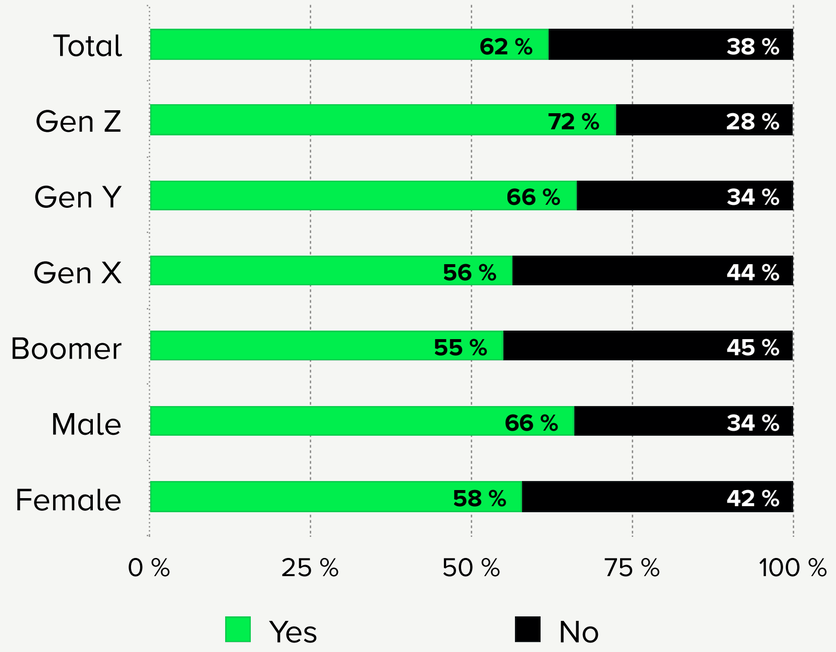
73%

of Germans would support a ‘Blade Runner’ law that would make it **illegal for AI to conceal its identity and impersonate a real human**

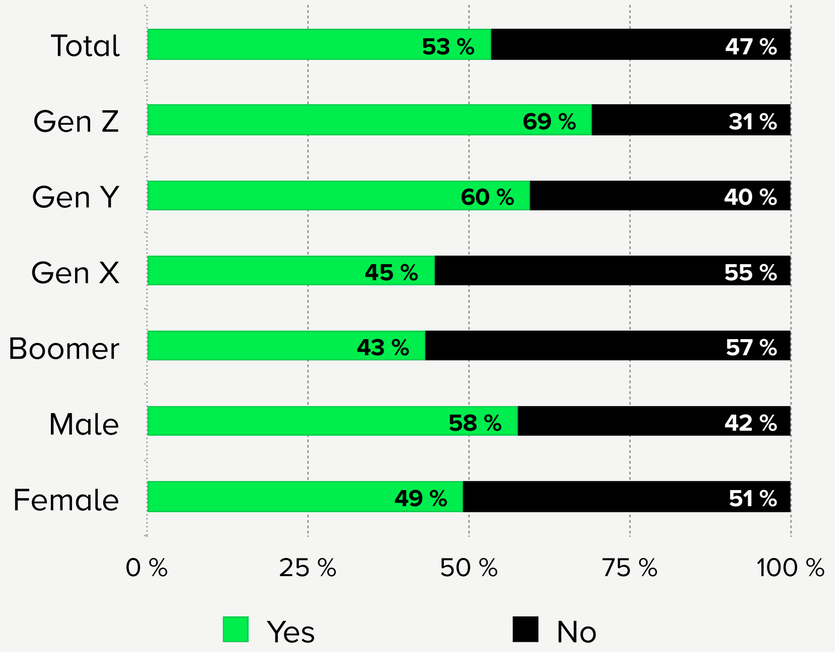
Survey Data

/ **GenAI** Awareness

Have you heard of artificial intelligence (AI) that can behave creatively and automate creative activities like generating art, designing products, or even composing music?



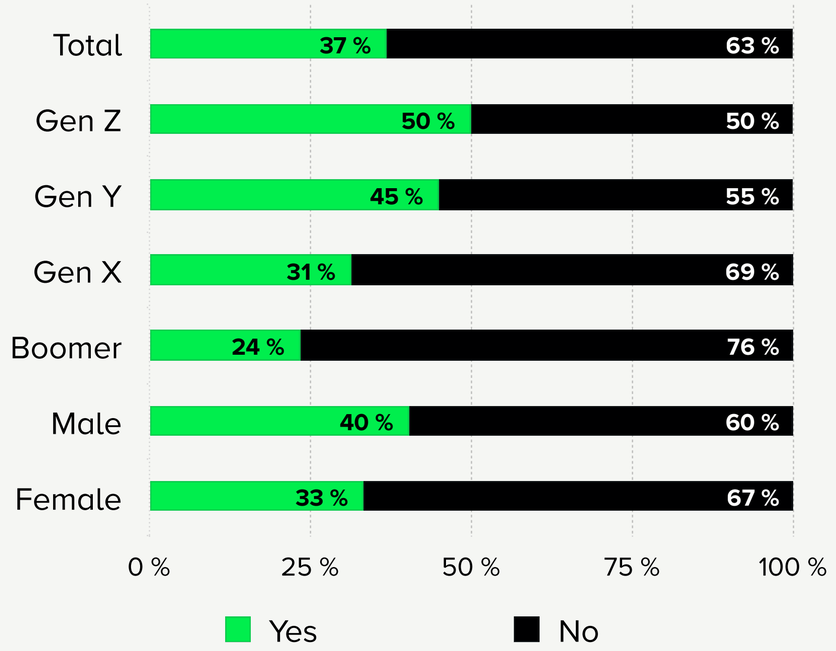
Have you heard of artificial intelligence (AI) that can of automate creative tasks in **business** such as creating ads, writing social media posts, or designing new products and websites?



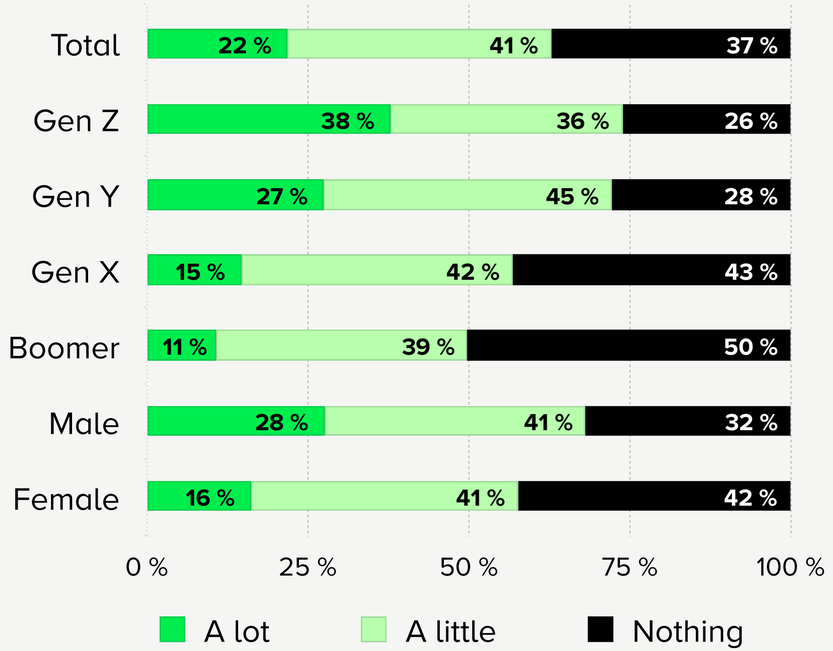
2023 SYZYGY Group Digital Insight Survey on Generative AI. General population sample of German adults aged 18-77. N = 1104. Fieldwork conducted Feb 2023 using Momentive AI online consumer panel. NB Rows/Column may not total 100% due to rounding.

/ **GenAI** Awareness

Have you heard of the terms “Generative AI” or “Creative AI”?



How much, if anything, have you heard about “ChatGPT”, an artificial intelligence based computer program that can generate human-like text?



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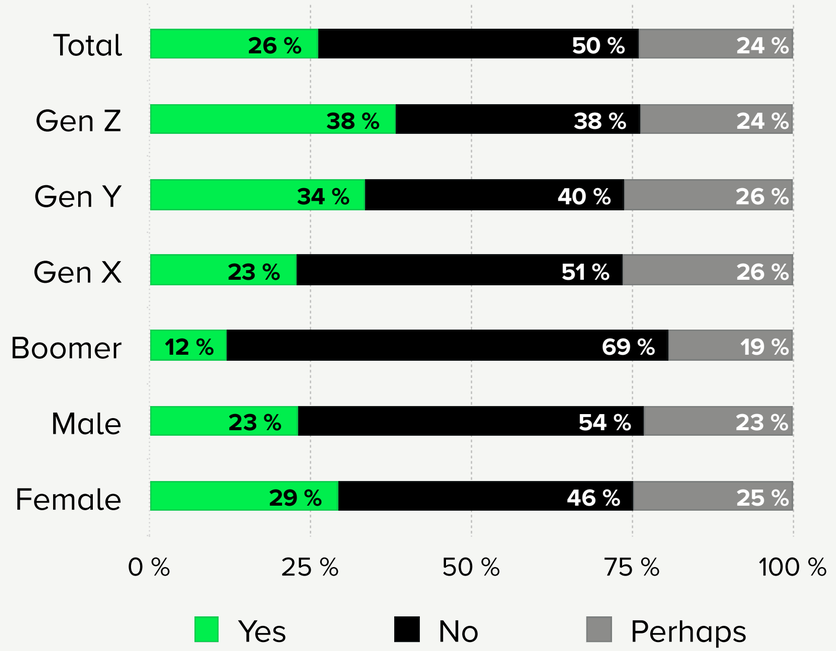
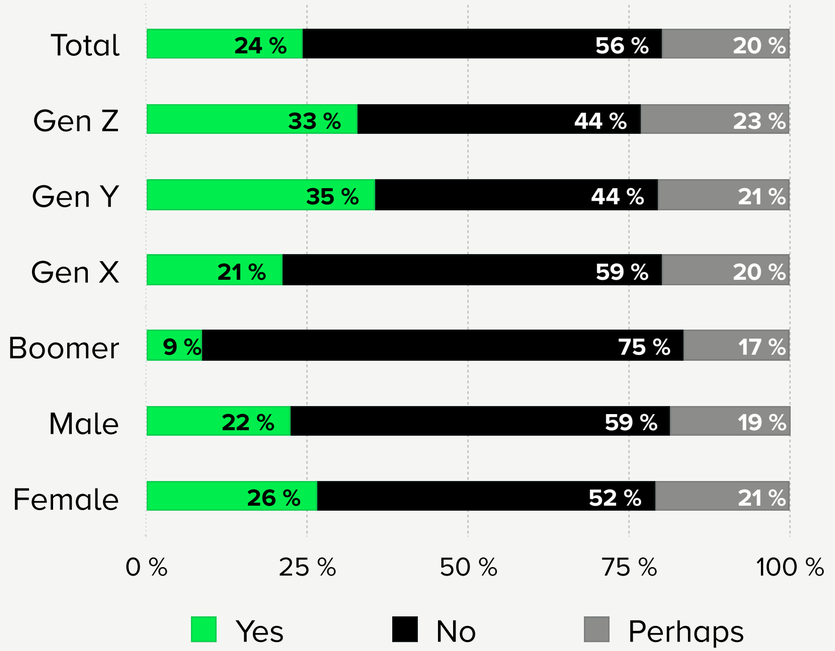
/ **GenAI** Interest

Would you be interested in trying the following free online service? *Upload a photo of a deceased loved one to animate it into a video*



Would you be interested in trying the following free online service? *Upload a photo of a lost loved one with a snippet of their voice and a script to create a video of them speaking the script in their own voice*



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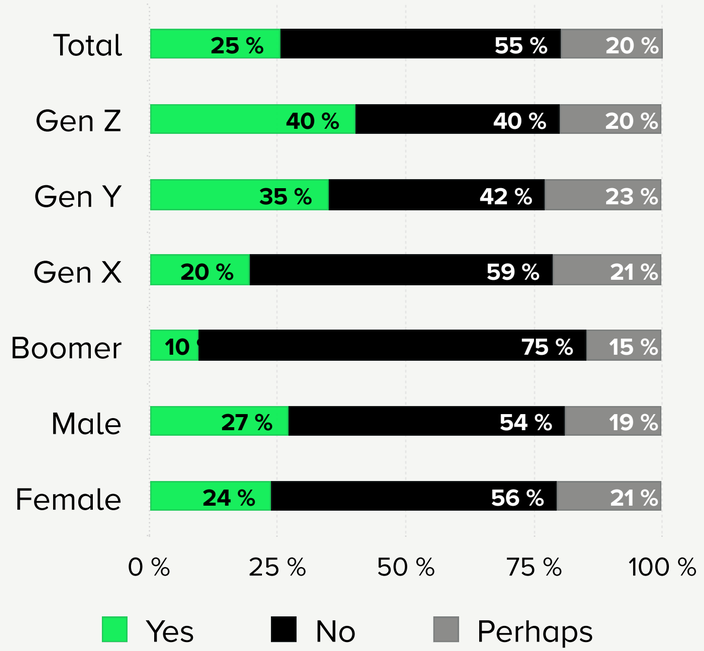
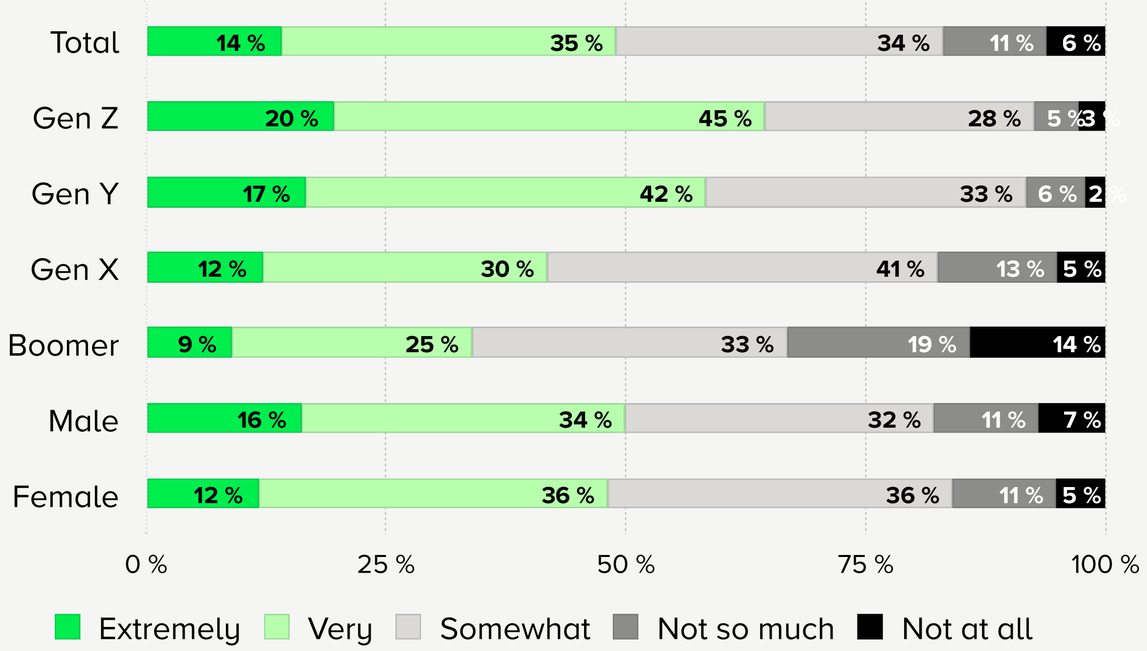
/ GenAI Interest

If you could digitally clone yourself so people could interact with you after you die, would you do it?



Overall, how interested would you be in trying out "Generative AI", which is considered a form of artificial creativity that enables computers to generate new and imaginative content in the form of text, images, video or music?



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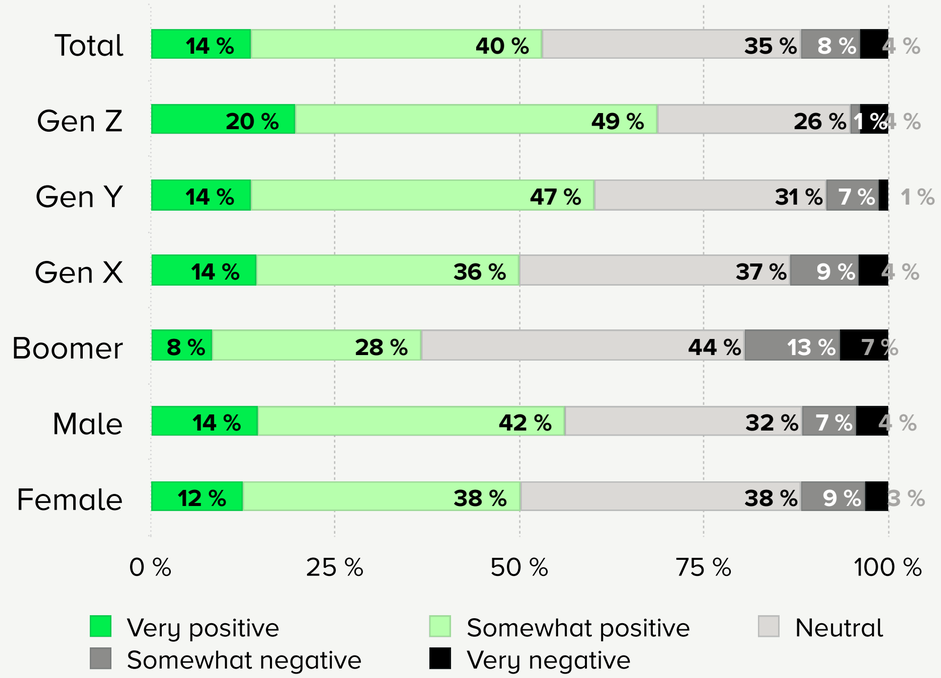
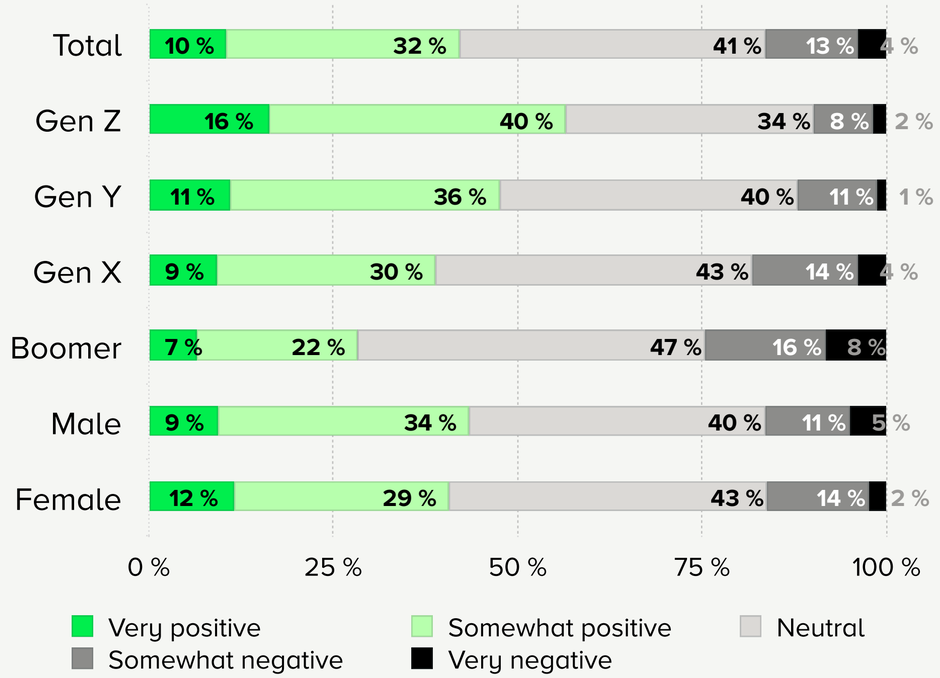
/ GenAI Emotions

How would you describe your emotional reaction to the idea of artificial intelligence (AI) being creative?



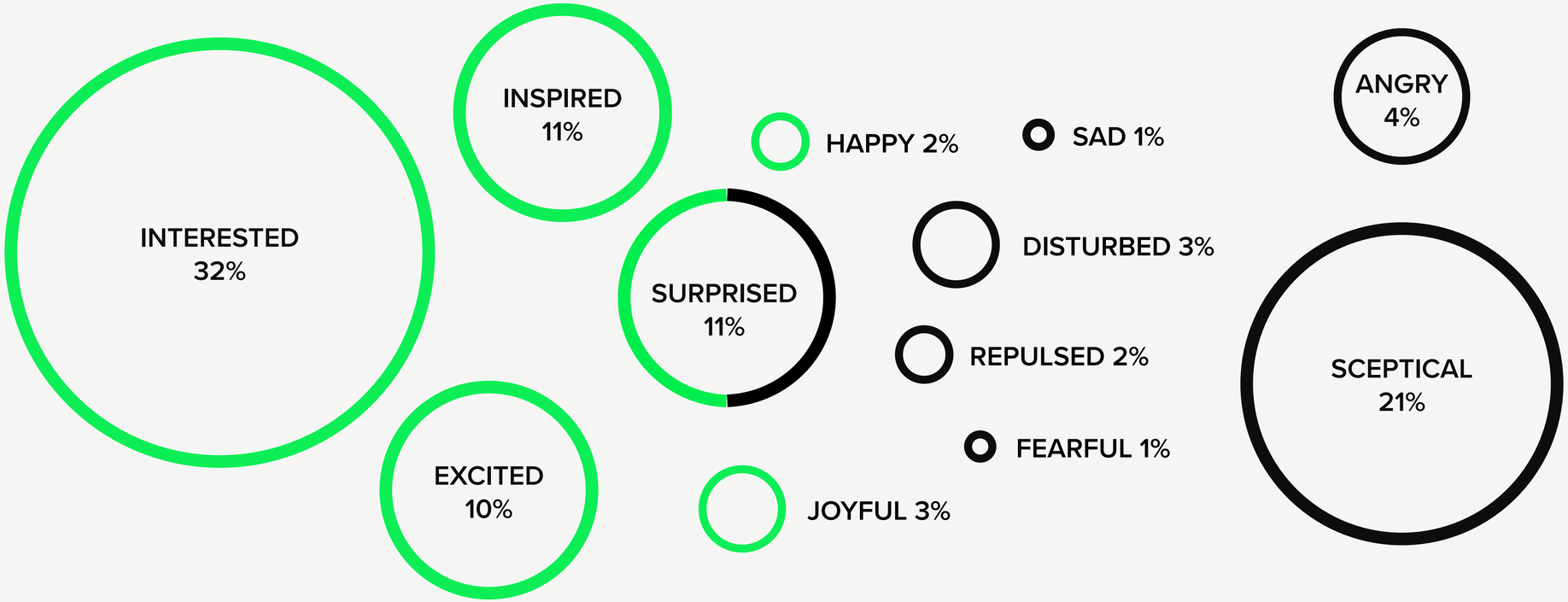
How would you describe your emotional reaction if you found out that your favourite brand is using AI to automate creative tasks in advertising, marketing or design?



2023 SYZYGY Group Digital Insight Survey on Generative AI. General population sample of German adults aged 18-77. N = 1104. Fieldwork conducted Feb 2023 using Momentive AI online consumer panel. NB Rows/Column may not total 100% due to rounding.

/ **GenAI** Emotions

How do you feel when you think about AI being creative, and producing art, stories, music and designs?
(Select the word that best describes how you feel)



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/ **GenAI** Emotions

How do you feel when you think about AI being creative, and producing art, stories, music and designs?
(Select the word that best describes how you feel)

	TOTAL	GEN Z	GEN Y	GEN X	BOOMER	MALE	FEMALE
Surprised	11 %	13 %	11 %	10 %	10 %	9 %	12 %
Interested	32 %	36 %	31 %	30 %	32 %	33 %	32 %
Excited	10 %	14 %	15 %	9 %	1 %	9 %	10 %
Inspired	11 %	8 %	14 %	12 %	10 %	13 %	9 %
Happy	2 %	4 %	3 %	2 %	0 %	2 %	2 %
Joyful	3 %	5 %	5 %	2 %	1 %	3 %	3 %
Disturbed	3 %	2 %	2 %	4 %	3 %	3 %	3 %
Sad	1 %	1 %	1 %	1 %	2 %	1 %	1 %
Fearful	1 %	0 %	1 %	0 %	1 %	1 %	1 %
Angry	4 %	6 %	3 %	4 %	4 %	4 %	5 %
Repulsed	2 %	1 %	1 %	2 %	2 %	2 %	1 %
Sceptical	21 %	11 %	13 %	24 %	33 %	19 %	22 %

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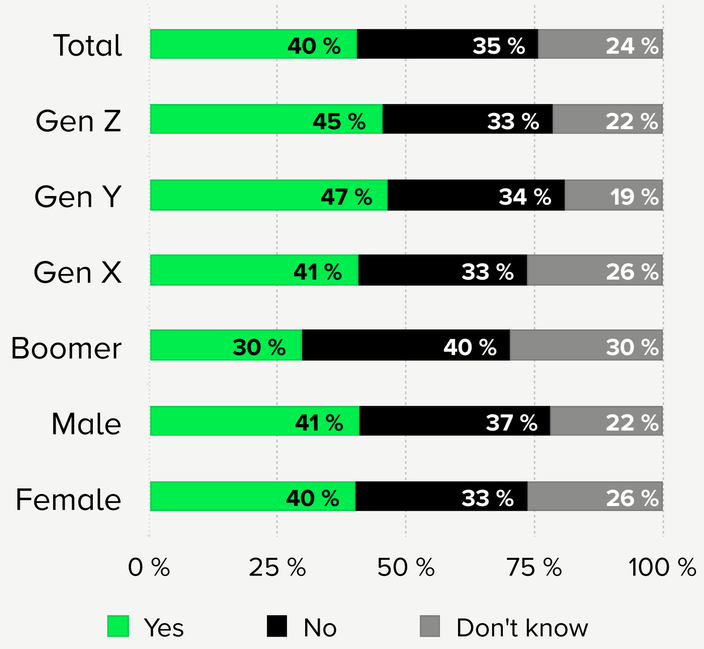
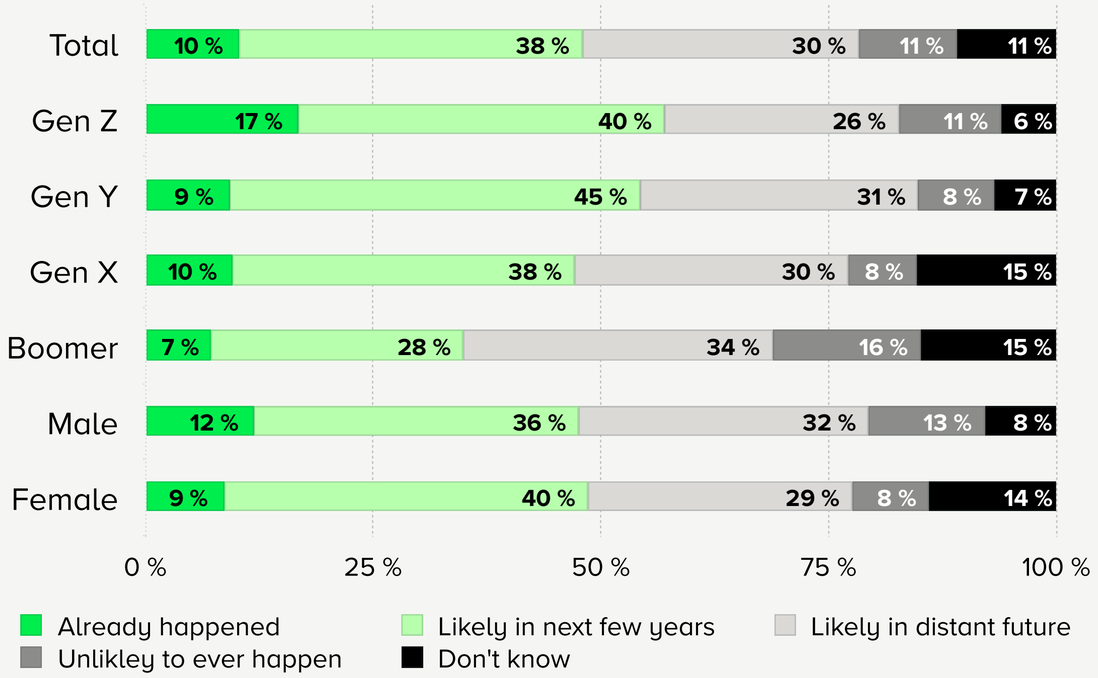
/ **GenAI** Perceptions

Do you believe art created by AI could ever be as good as art created by the best human artists?



When, if ever, do you think AI will surpass humans in terms of creative ability?



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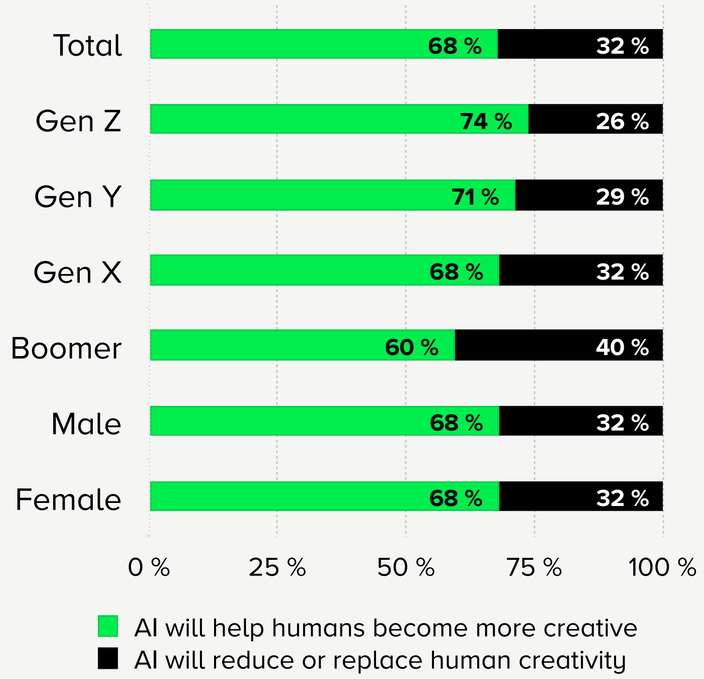
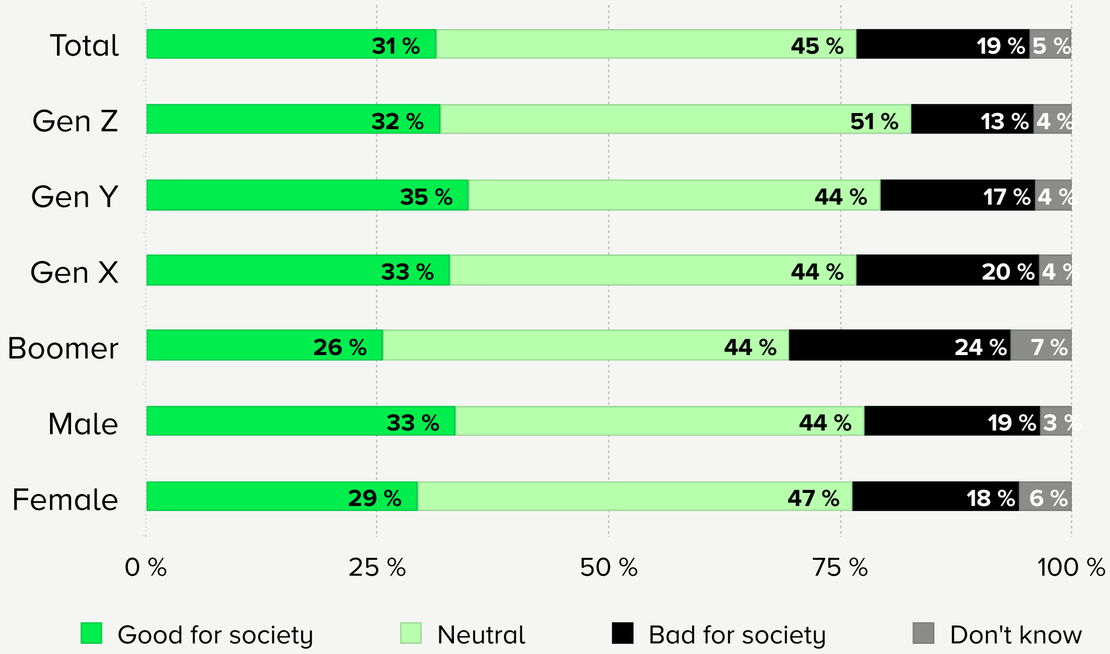
/ **GenAI** Perceptions

Which of the following statements is closest to your personal view?



Overall, do you think AI creativity will be a good or bad thing for society?



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/ **GenAI** Perceptions

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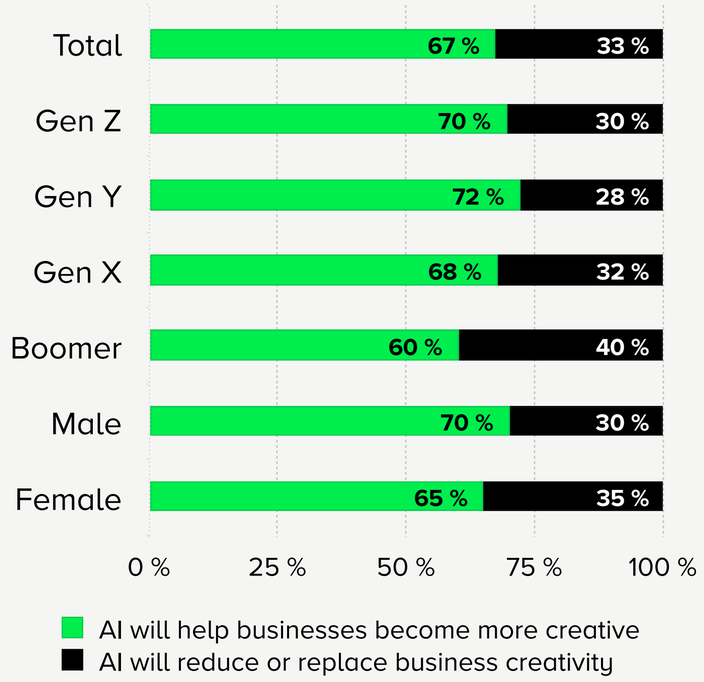
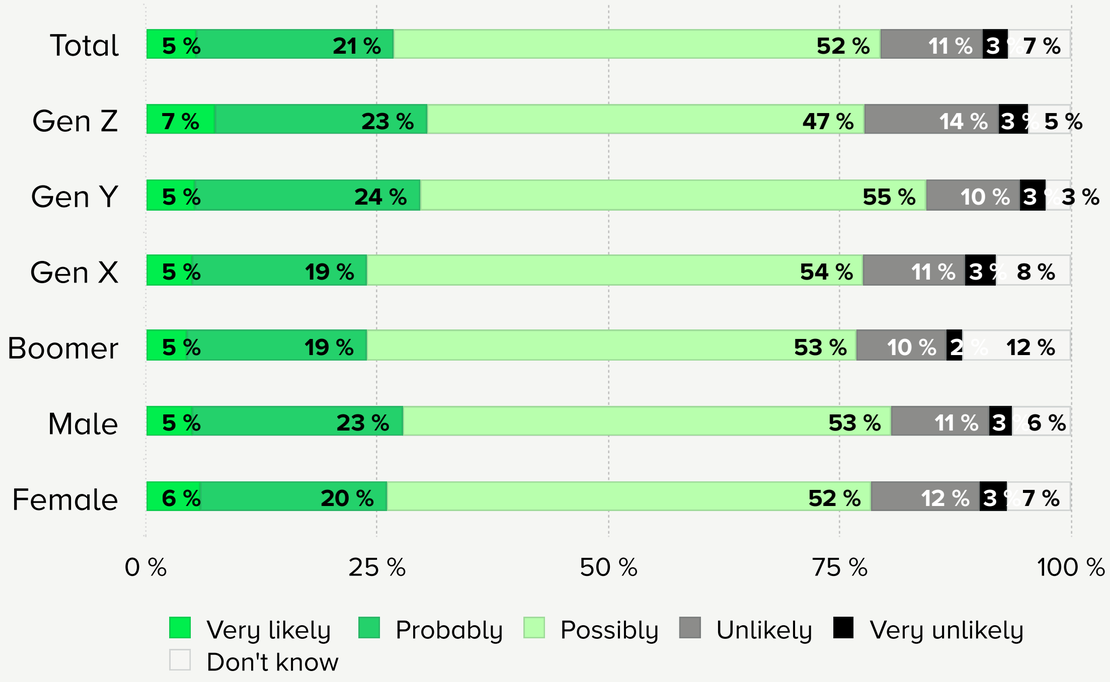


How likely do you think it is that your favourite brand is already using AI to automate creative tasks in advertising, marketing or design?



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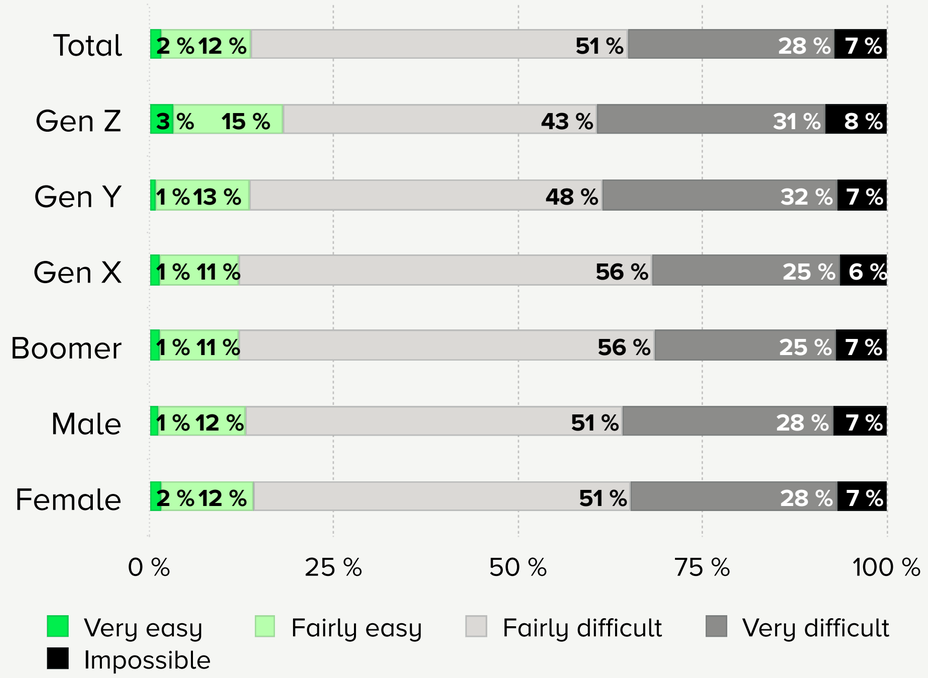
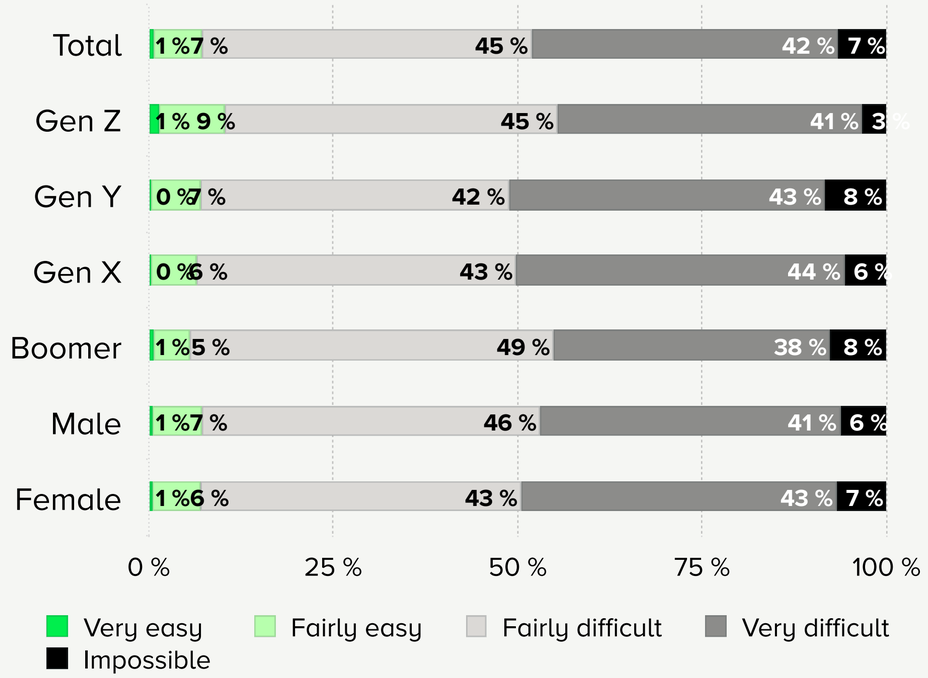
/ **GenAI** Perceptions

How easy do you think it is to recognise advertisements or articles that have been created by AI instead of humans?



In general, how easy do you think it is to spot if online content is computer-generated rather than created by humans?



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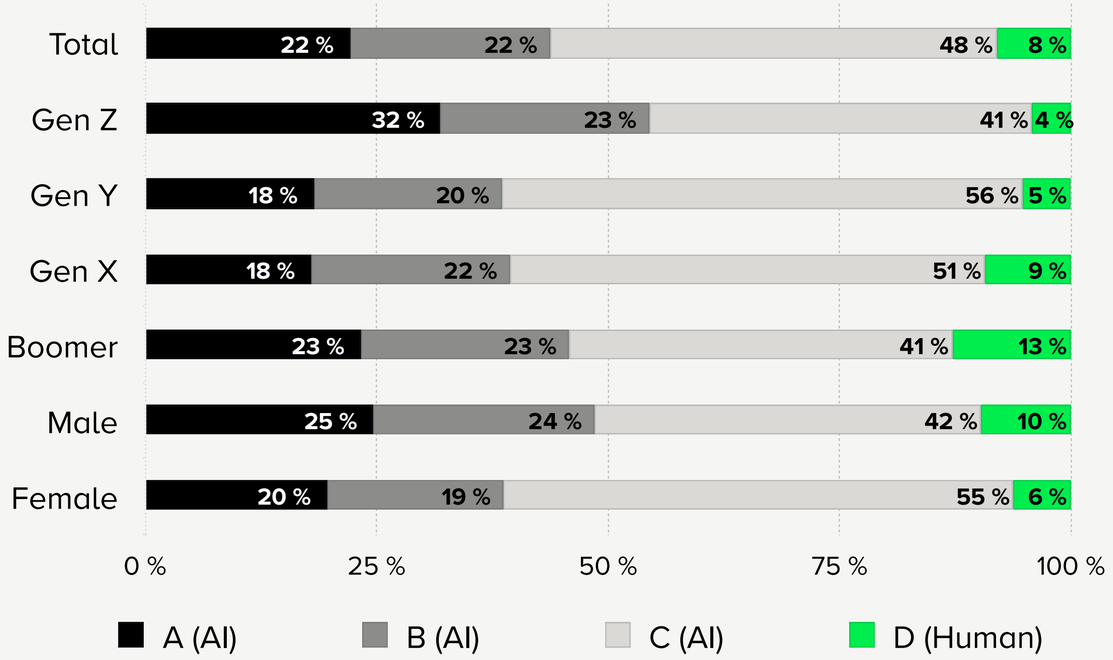
/ GenAI Perceptions

Which one of these photos is a real photo of a genuine human? (The other three are artificial images generated by AI)



Images A, B, & C sourced from this-person-does-not-exist.com

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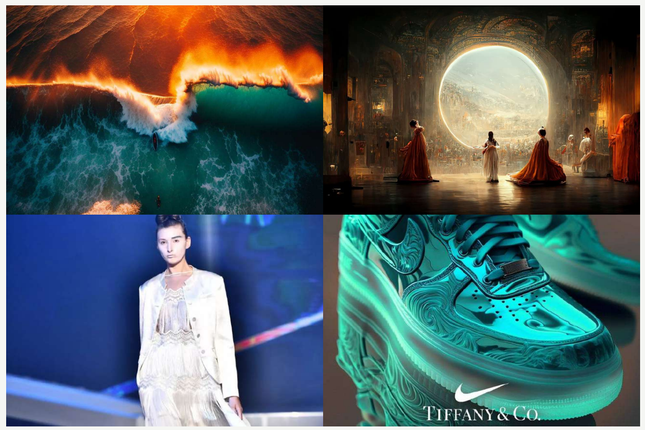
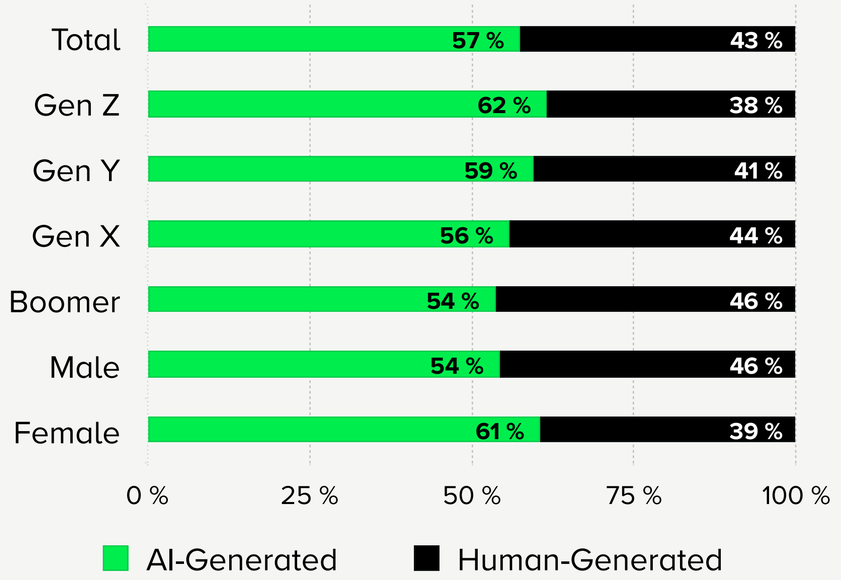
/ **GenAI** Preferences



AI-Generated*

Human-Generated**

Which of these images and designs do you prefer? (combined results)



*AI-Generated: Winner 2023 DigiDirect Summer photo contest "Drone shot" by "Jane Eykes" (Absolutely AI); Winner 2022 Colorado State Fair Fine Arts Competition "Theatre D'Opera Spatial" by Midjourney/Jason Allen; Runner up 2019 Shanghai International Fashion Design Innovation Competition by DeepVogue; Nike x Tiffany 2023 by AI digital artist RickDick. **Human-Generated: Winner 2012 Nikon Surf Photo of the Year contest by Stu Gibson; Winner 2019 California State Fair Fine Arts Competition "Requiem for a Wedding Cake" by Alexandra Lown; Winner 2019 Shanghai International Fashion Design Innovation Competition by Valentina Cosenza & Giada Petrolini; Nike x Tiffany 2023 Airforce 1 collaboration from Nike and Tiffany

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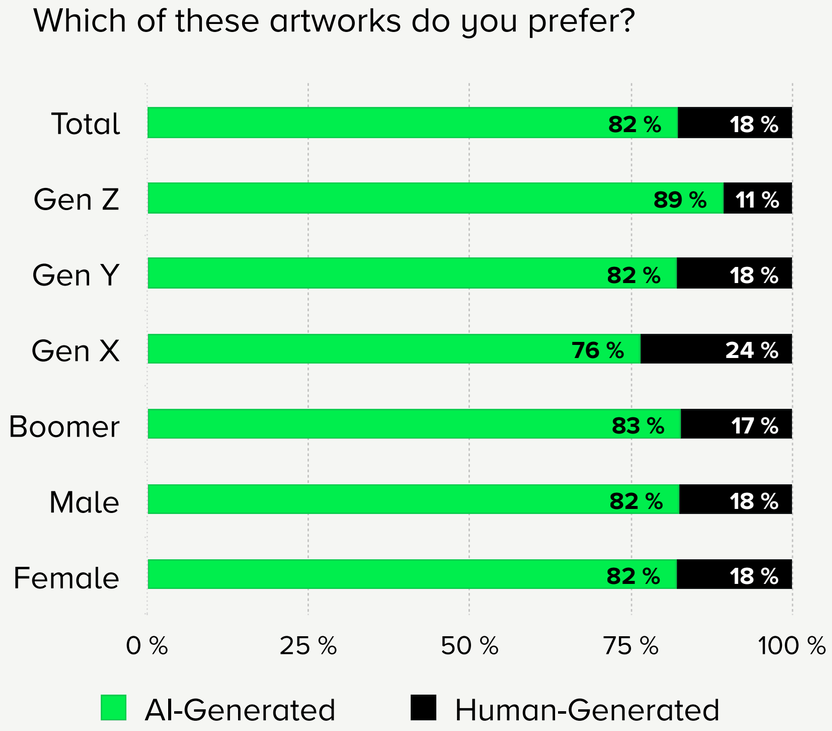
/ **GenAI** Preferences

AI-Generated
Winner 2022 Colorado State Fair Fine Arts Competition “Theatre D'Opera Spatial” by Midjourney/ Jason Allen

Human-Generated
Winner 2019 California State Fair Fine Arts Competition “Requiem for a Wedding Cake” by Alexandra Lown



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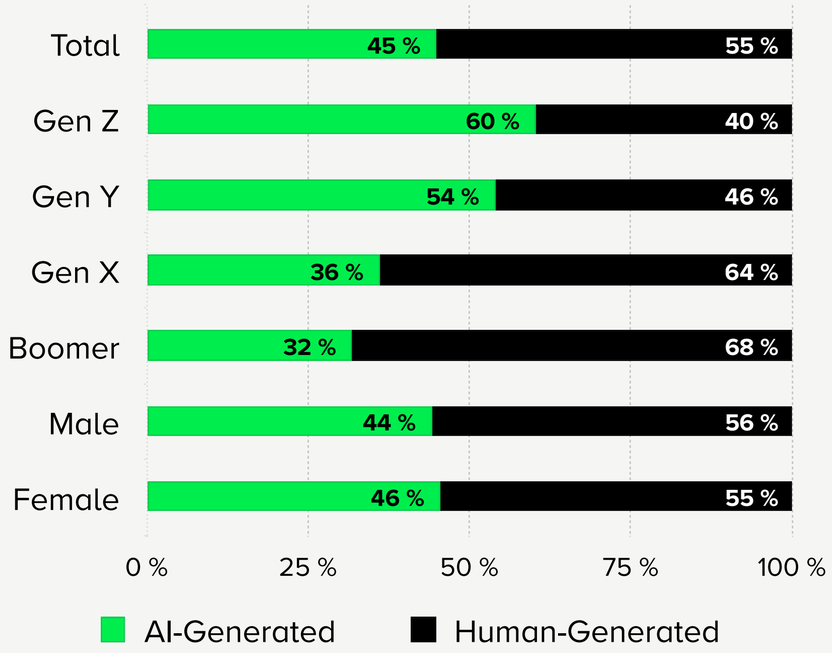
/ **GenAI** Preferences

AI-Generated
Winner 2023 DigiDirect Summer photo contest “Drone shot” by “Jane Eykes” (Absolutely AI)

Human-Generated
Winner 2021 Nikon Surf Photo of the Year contest by Stu Gibson

Which of these photos do you prefer?



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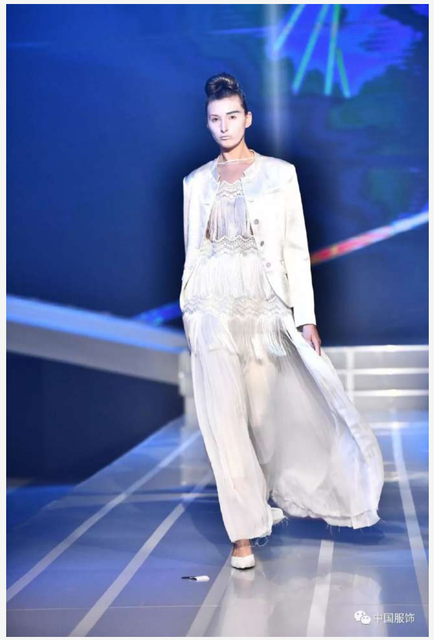
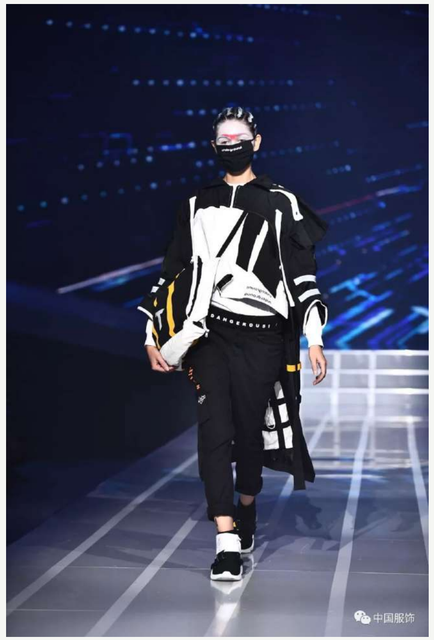
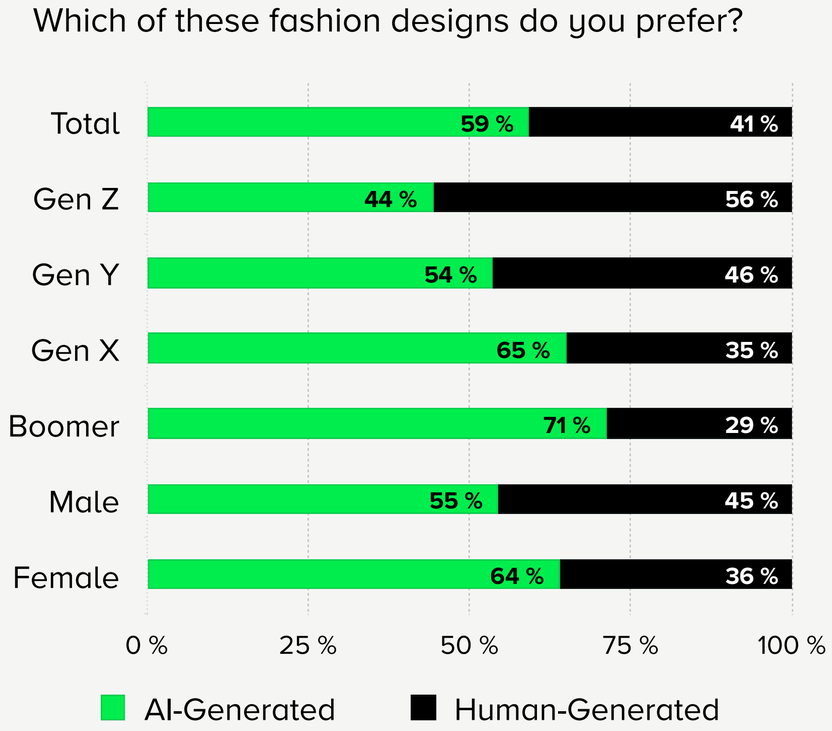
/ **GenAI** Preferences



AI-Generated
Runner up 2019 Shanghai International Fashion Design Innovation Competition by DeepVogue



Human-Generated
Winner 2019 Shanghai International Fashion Design Innovation Competition by Valentina Cosenza & Giada Petrolini



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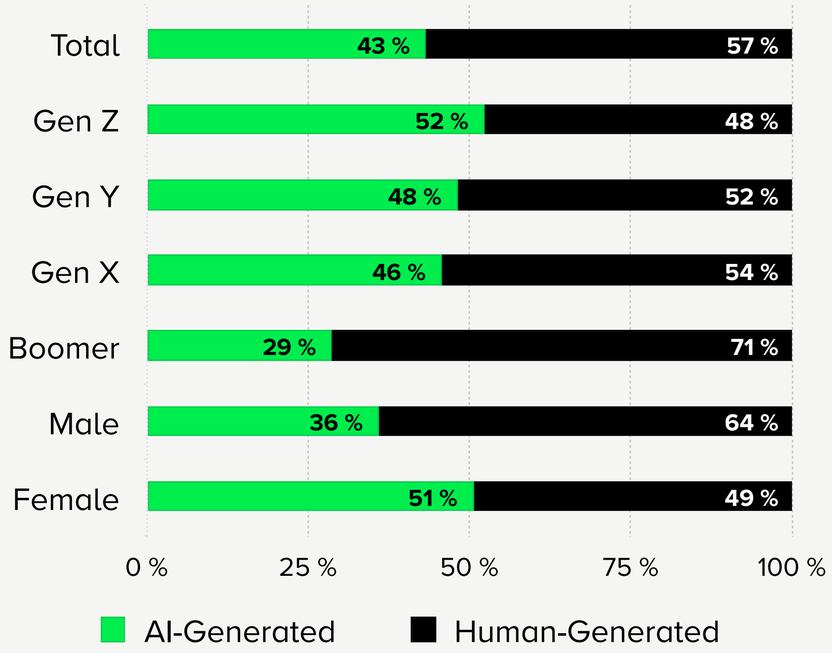
/ **GenAI** Preferences

AI-Generated
Nike x Tiffany 2023
by AI digital artist RickDick

Human-Generated
Nike x Tiffany 2023
Airforce 1 collaboration from Nike and Tiffany

Which of these sneakers do you prefer?



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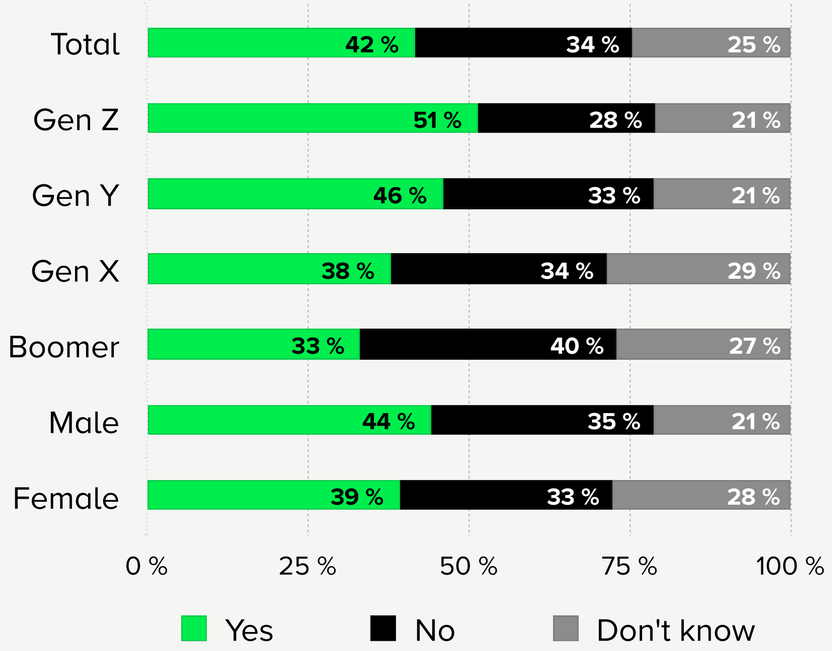
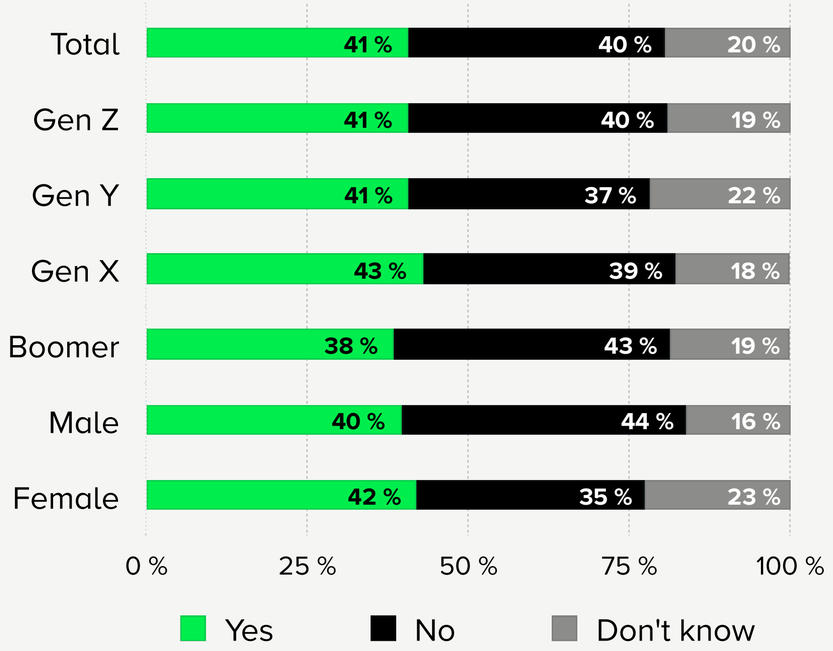
/ **GenAI** Preferences

Do you think it would be a good idea for for your favourite brand to use AI instead of humans for creative tasks in marketing if this reduces the company's carbon footprint and doesn't have a negative impact on quality?



Would you be disappointed if your favourite brand closed its marketing department and used AI instead for all its advertising and marketing needs, if this reduced the brand's carbon footprint?



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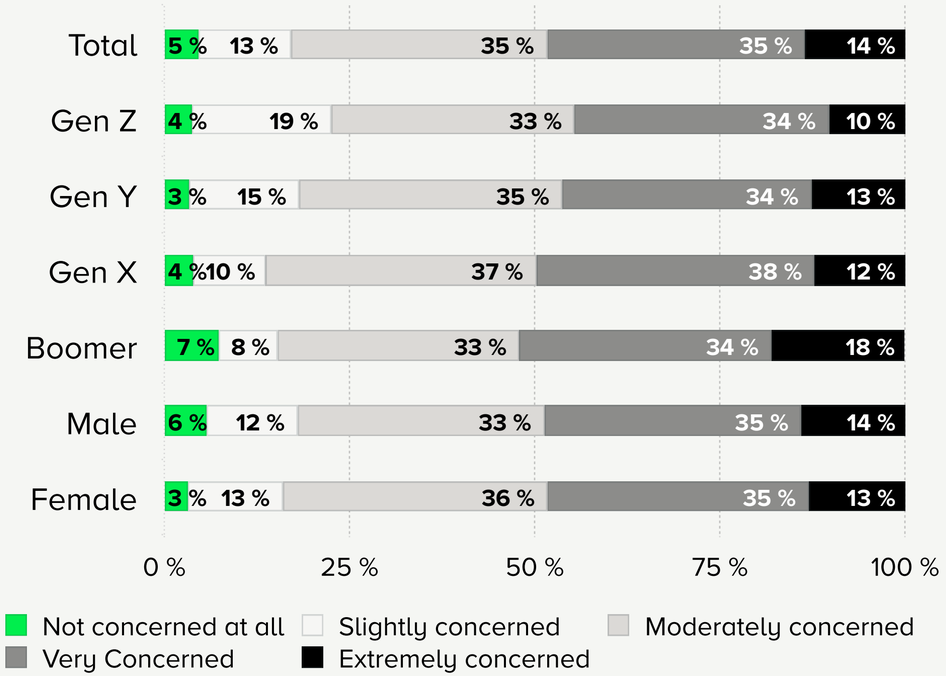
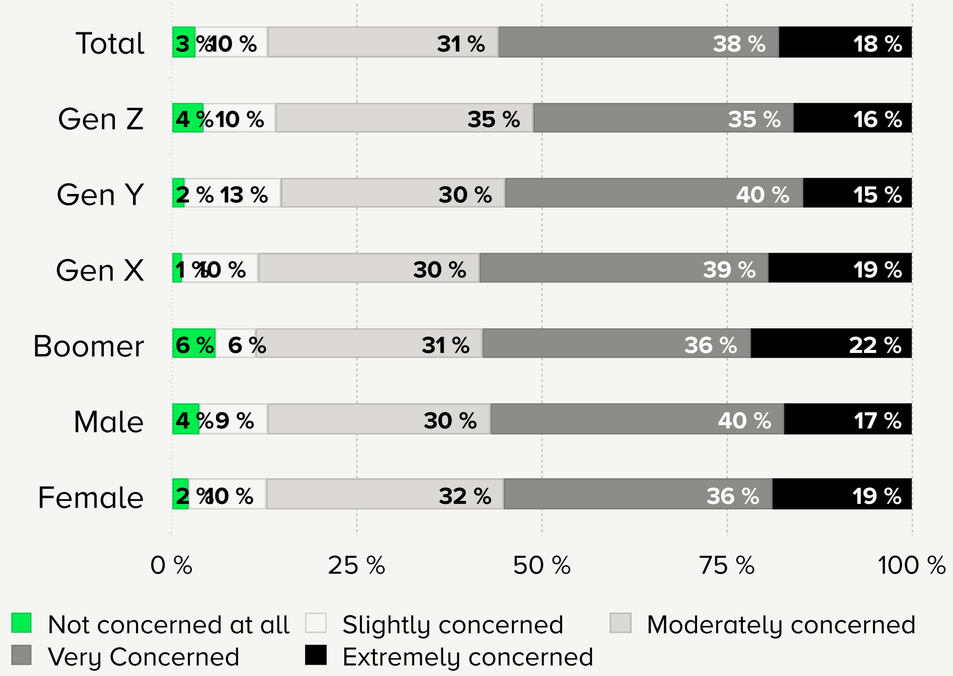
/ GenAI Concerns

How concerned, if at all, are you about AI being used to create and distribute false and harmful content online?



How concerned, if at all, are you about companies using AI to mislead or manipulate consumers (e.g. fake reviews, fake recommendations, etc.)?



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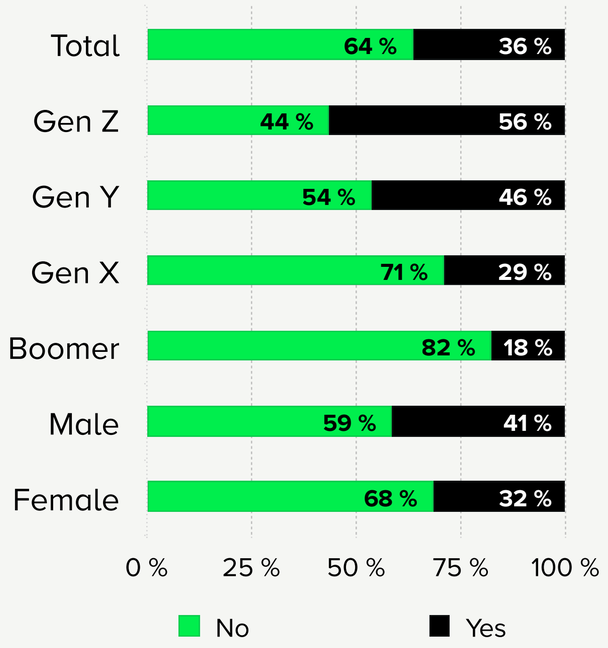
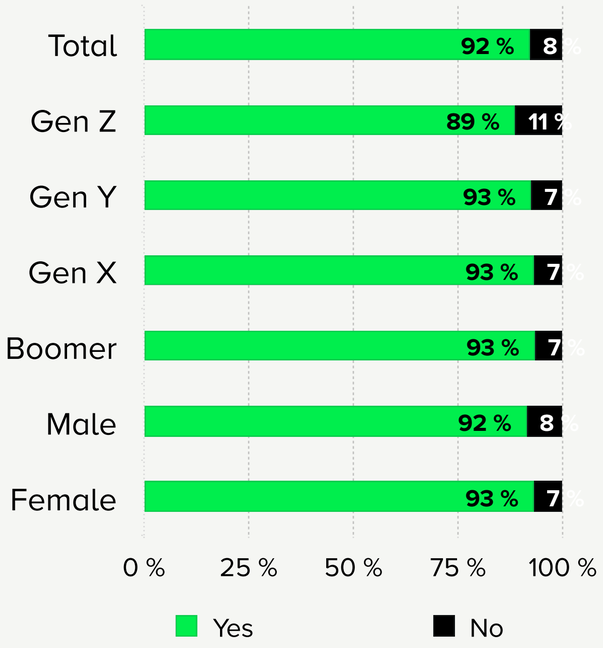
/ **GenAI** Concerns

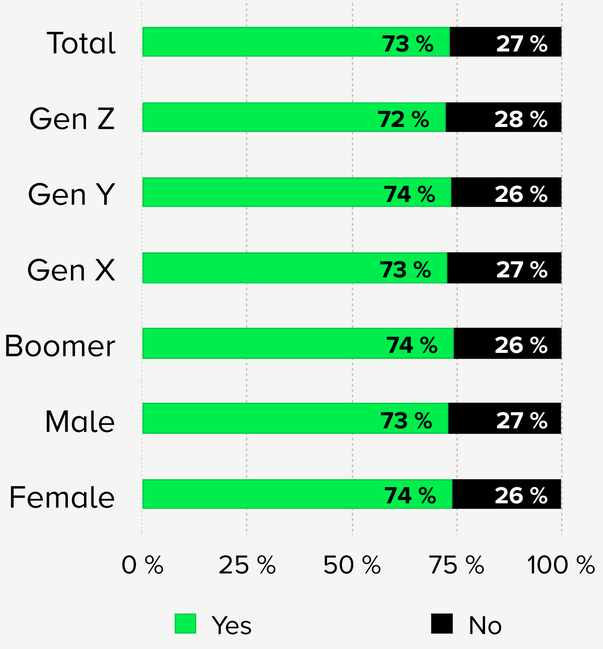
To your knowledge, have you ever seen a “deepfake” (videos or images that have been artificially created or altered to look like someone or something else)?



Do you think people should have the right to know if the content they are consuming has been generated or altered by AI?



Would you support a new law that would make it illegal for AI to conceal its identity and impersonate a real human?



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/ Methodology

This SYZYGY digital insight survey on public perceptions of Generative artificial intelligence (GenAI) was conducted online in February 2023 using a general population sample from the Momentive AI online consumer survey panel. A total 1104 members of the German public successfully completed the seven minute online survey, and passed the attention check question for quality control.

The initial sample frame was balanced by gender and generation to reflect the range of views from the German public.

Ages ranged 18-77, made up of 50% men, 50% women.
Generationally, the sample was split between Generation Z (born 1997-2012) “Millennials” (Gen Y) (born 1981-1996),“Generation X” (born 1965-1980) and “Boomers” (born 1945-1964).

The survey was conducted and analysed by SYZYGY’s in-house consumer psychologist Dr Paul Marsden.

Questions about the survey questions, findings and methodology can be addressed to **Paul via SYZYGY’s PR** manager **Inessa Brauer** (Inessa.Brauersyzygy.de).

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ANALYSED SAMPLE
Participants who completed survey and who passed attention check

	N	%
Total	1104	100.0 %
Male	556	50.4 %
Female	545	49.4 %
Other	3	0.0 %
Gen Z	213	19.3 %
Gen Y	324	29.3 %
Gen X	279	25.3 %
Boomer	288	26.1 %

/ About SYZYGY GROUP

SYZYGY: Digital that makes a difference

Increasingly, positive digital experiences determine a brand's success. For the world's most successful brands, the quality of their digital experiences is their top priority – it's a strategy that builds both strength and momentum.

At SYZYGY GROUP we create engaging and impactful brand experiences because digital expertise is in our DNA. Since 1995 we have been working to create long-lasting relationships between people and brands, as well as generating significant growth for our clients.

Contact:

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inessa.brauer@syzygy.de