



3M | Futures

South Korea Survey Results

South Korea

The 3M Futures Study was conducted across 11 countries to understand global perceptions of science and technology innovation—and its role in society.

The survey also highlighted Artificial Intelligence, Augmented & Virtual Reality, Sustainability and “The New Paradigm,” an area focused on the pandemic’s impact on our lives.

France – Brazil – China – Mexico – Canada – Japan – Germany – UK – USA – India – South Korea

Key Findings — Science & Technology Perceptions



1

South Koreans want innovation in science and technology to focus on fixing environmental and societal problems – specifically prioritizing public health, a cure for Alzheimer’s, inventions that lower your carbon footprint and renewable energy over the next 5 years.

2

People expect a lot of new innovations in science and technology to become a part of our everyday lives over the next 10 years.

- Most believe that virtual reality for entertainment and gaming and a vaccination for the common cold will be a part of people’s everyday lives in the next 5 years.

3

Many feel that “too much screen time” is a health issue that should be addressed, and we are too reliant on technology in our everyday lives.

- However, despite those perceptions most feel that technological advancements like access to information, digital entertainment, digital news and social media will have a similar impact on society over the next 10 years as they’ve had over the past 10 years.

Methodology: This poll was conducted between November 17-December 18, 2021 among a sample of 22,001 Adults. The interviews were conducted online. Results from the full survey have a margin of error of plus or minus 1 percentage point. An oversample of N=200 of was also fielded among those 18-24 – The interviews were conducted online. Results from the full survey have a margin of error of plus or minus 2 percentage points.

Key Findings — AI (Artificial Intelligence)



1

Most are familiar with AI technology and recognize its role in their everyday lives.

- Regardless of the role people feel AI is currently playing in their everyday lives, they expect it to increase over the next 5 years, and many believe cutting-edge AI advancements like driverless vehicles will be a part of our lives in the next 10 years.

2

While there is excitement around AI technology, people have concerns related to data privacy and want more transparency on how the technology is being used in society.

Methodology: This poll was conducted between November 17-December 18, 2021 among a sample of 22,001 Adults. The interviews were conducted online. Results from the full survey have a margin of error of plus or minus 1 percentage point. An oversample of N=200 of was also fielded among those 18-24 – The interviews were conducted online. Results from the full survey have a margin of error of plus or minus 2 percentage points.

Key Findings — AR (Augmented Reality) and VR (Virtual Reality)



1

Most are familiar with virtual reality and augmented reality and believe that they play a significant role in their everyday lives.

- Those who have used a form of augmented reality already are more likely to be familiar with the technology and its role in their everyday lives.

2

Virtual reality is expected to be a normal part of our everyday lives sooner than most other advancements, especially in uses related to gaming and entertainment.

Methodology: This poll was conducted between November 17-December 18, 2021 among a sample of 22,001 Adults. The interviews were conducted online. Results from the full survey have a margin of error of plus or minus 1 percentage point. An oversample of N=200 of was also fielded among those 18-24 – The interviews were conducted online. Results from the full survey have a margin of error of plus or minus 2 percentage points.

Key Findings — Sustainability



1

Half of South Koreans strongly agree that single-use plastics are a major threat to the environment and that climate change is the biggest threat to humankind.

- Most agree that fossil fuels and fast fashion are also major threats to the environment.

2

Most agree that governments and businesses should be held accountable for their environmental impact.

3

Most are willing to rent or own a fully sustainable home or buy/lease an all-electric vehicle, however a plurality feel that cities powered entirely by renewable energy won't be a part of our everyday lives for more than ten years from now.

Methodology: This poll was conducted between November 17-December 18, 2021 among a sample of 22,001 Adults. The interviews were conducted online. Results from the full survey have a margin of error of plus or minus 1 percentage point. An oversample of N=200 of was also fielded among those 18-24 – The interviews were conducted online. Results from the full survey have a margin of error of plus or minus 2 percentage points.

Key Findings — New Paradigm

1

The pandemic has made a lasting impact on people’s lives. Most have had a significant life change as a result of the pandemic, and most agree that it has made them more aware of their personal health.

- As a result of all of this change there is room for innovations that impact public health, how we work, schooling, and other aspects of our everyday lives.

2

Most South Koreans feel overwhelmed with the constant need to connect to their devices. However South Koreans are split on new hobbies that allow them to unplug versus hobbies that they can easily access using their devices.

3

People have mixed feelings about telehealth technology, however, those that have already used telemedicine services are more likely to have a positive perception.

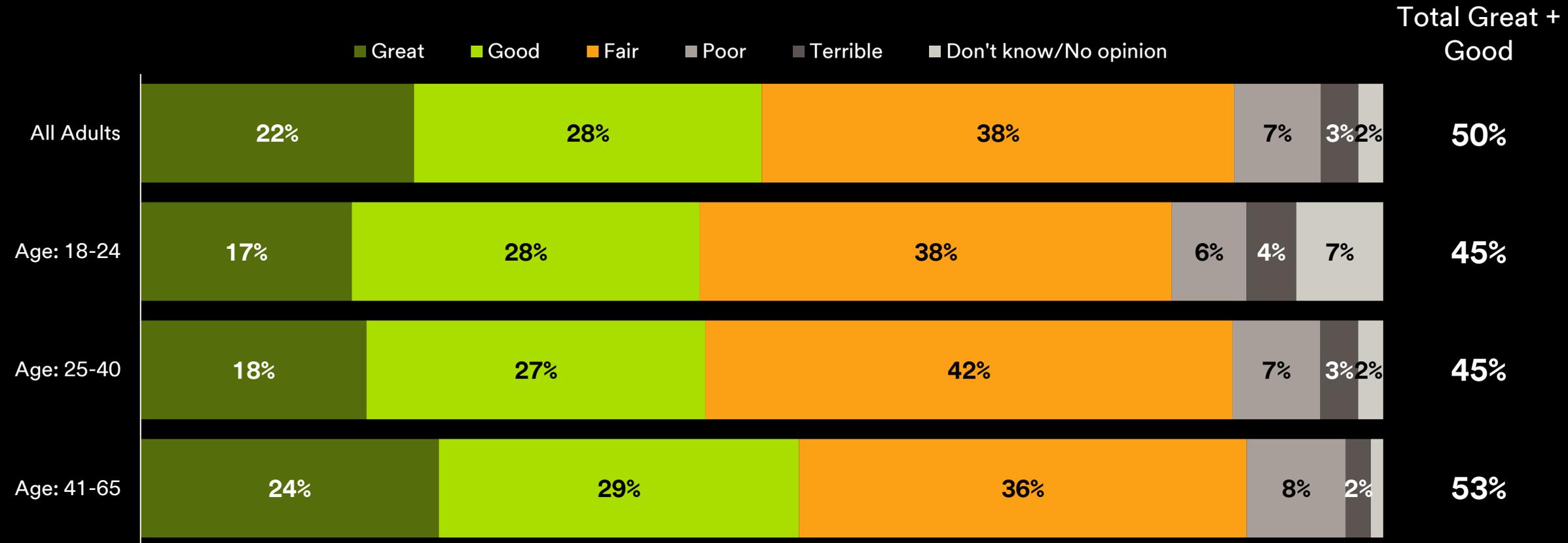
Methodology: This poll was conducted between November 17-December 18, 2021 among a sample of 22,001 Adults. The interviews were conducted online. Results from the full survey have a margin of error of plus or minus 1 percentage point. An oversample of N=200 of was also fielded among those 18-24 – The interviews were conducted online. Results from the full survey have a margin of error of plus or minus 2 percentage points.



Science & Technology Perceptions

South Koreans rate their government fair or better on technological access for its citizens.

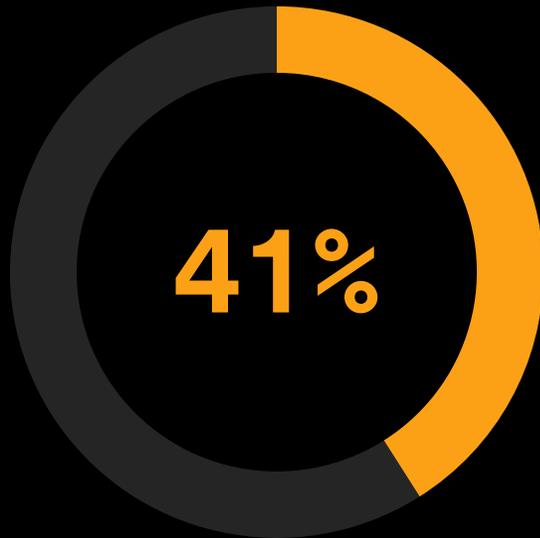
How would you rate South Korea on technological access for its citizens?



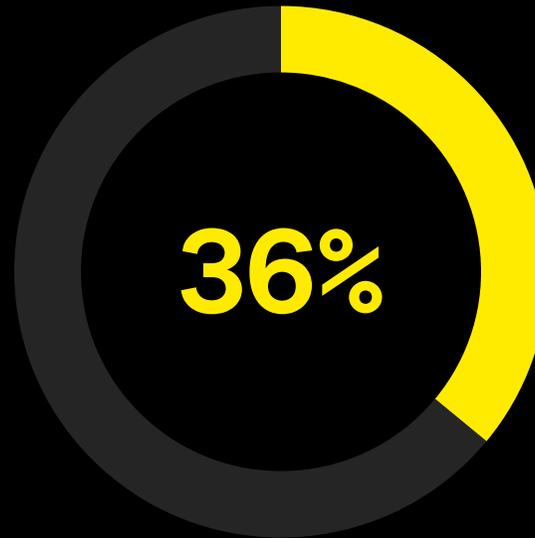
A plurality believe that finding solutions to environmental and societal problems should be the primary focus of science and technological innovation.

Which of the following statements best aligns with your belief on the primary focus of science and technological innovation? 'Science and technological innovation should...'

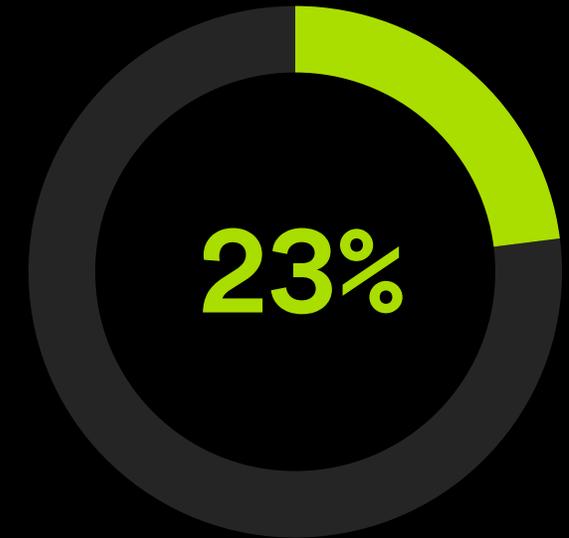
"Find solutions to today's **environmental and societal problems**, including climate change, sustainability, social injustice, clean water access, homelessness, etc."



"Protect us from **broader global crises** like future pandemics and public health preparedness, as well as propaganda and technological terrorism, like hacking and data stealing."



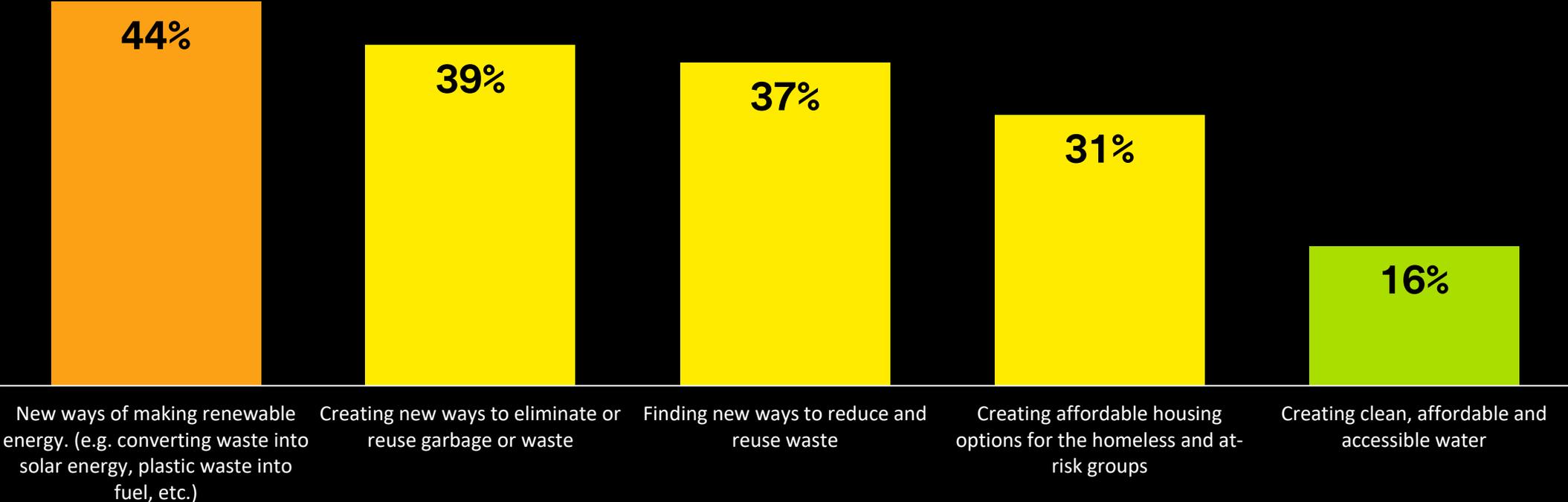
"**Advance the human race to achieve the impossible**, seeing how far we can innovate to create a futuristic and convenient world."



Finding new ways of making renewable energy is considered the most important infrastructure development for science and technology to prioritize in the next 5 years.

What infrastructure developments do you think are most important for science and technology innovation to prioritize in the next five years? Select up to 3.

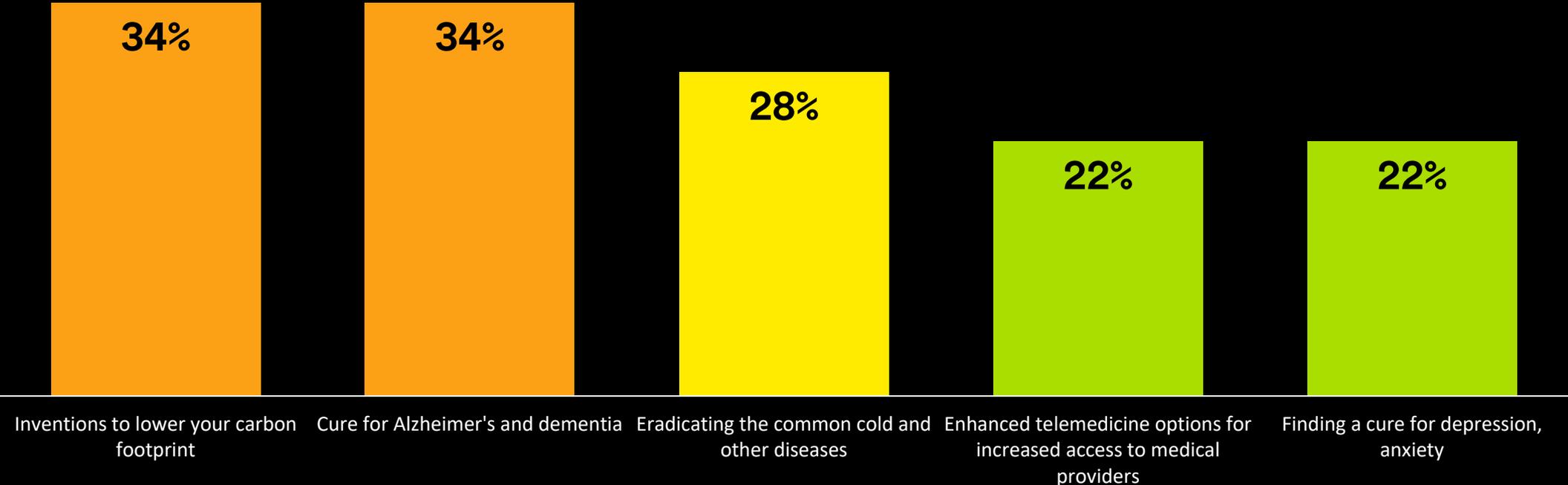
Top 5 selected:



Finding a cure for Alzheimer's and dementia and inventions that lower your carbon footprint are considered the most important human developments that science and technology should prioritize in the next 5 years.

What human developments do you think are most important for science and technology innovation to prioritize in the next five years? Select up to 3.

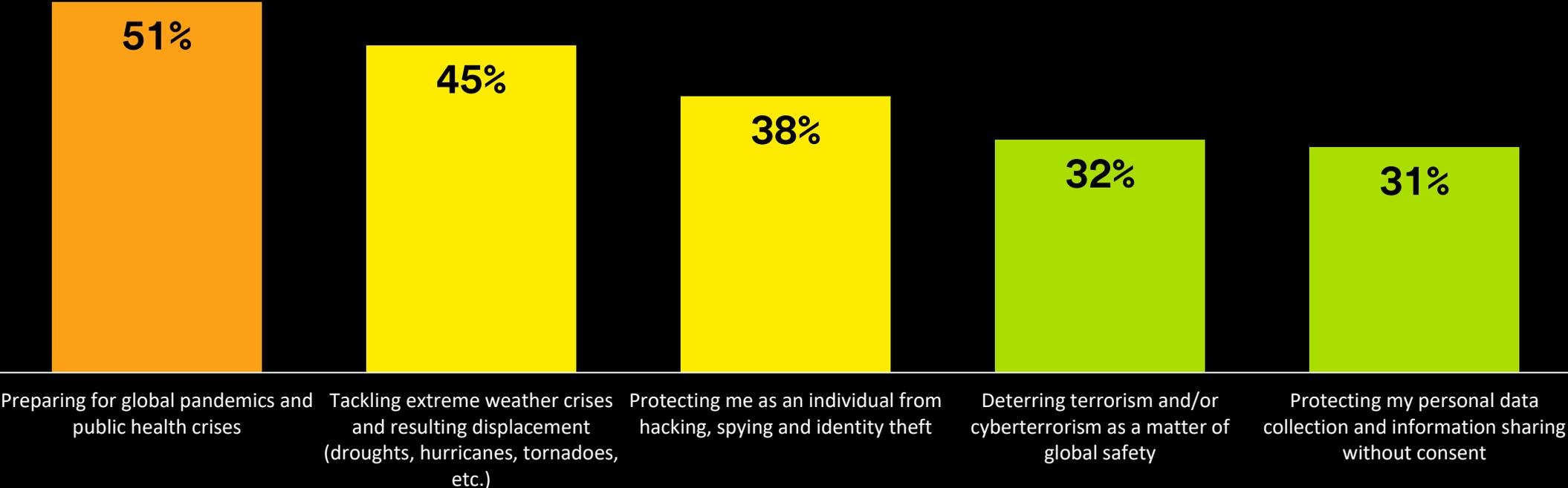
Top 5 selected:



Preparing for public health crises is the global crisis that South Koreans feel science and technology should prioritize in the next 5 years.

Which of the following global crises do you think are most important for science and technology innovation to prioritize in the next five years? Select up to 3.

Top 5 selected:



South Koreans agree that technology should make our lives easier, however, there are concerns about how much we rely on technology in our everyday lives and too much screen time.

How much do you agree or disagree with each of the following statements?

 **86%**

of people agree...

“Diverse groups of people working on today’s problems will lead to greater innovation”

 **80%**

of people agree...

“I think that ‘too much screen time’ is a health issue that should be addressed”

 **84%**

of people agree...

“More progress should be made in technology and science to make our lives easier or more convenient”

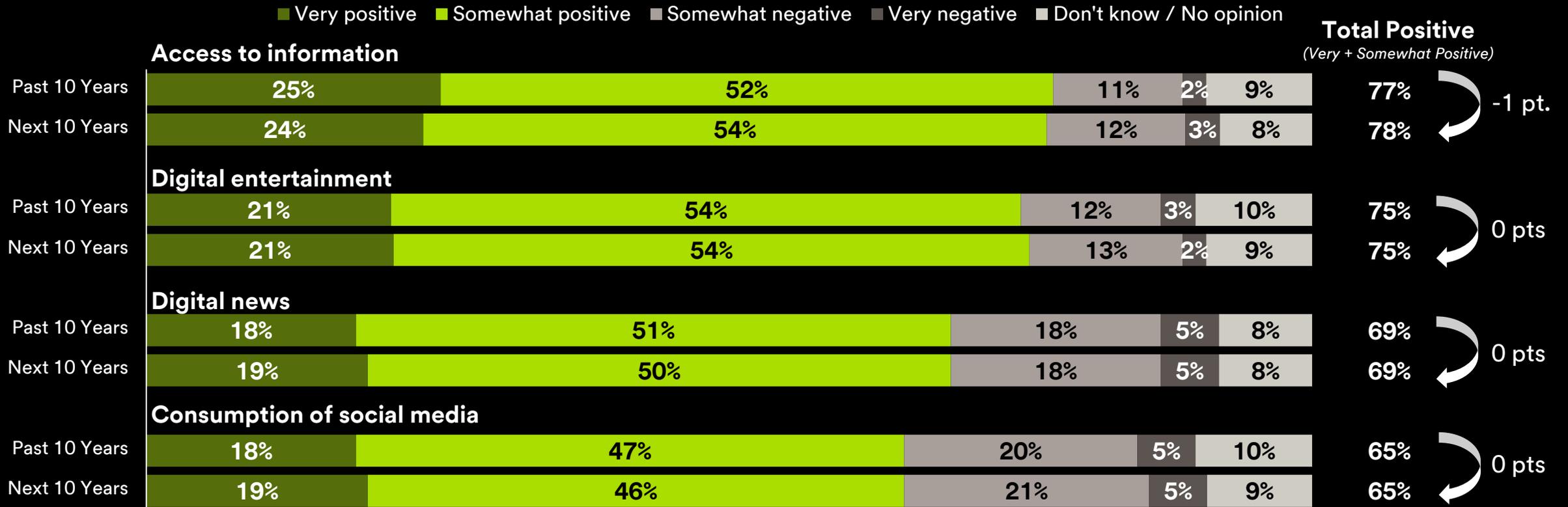
 **74%**

of people agree...

“As a society, we are too dependent on technology in our everyday lives”

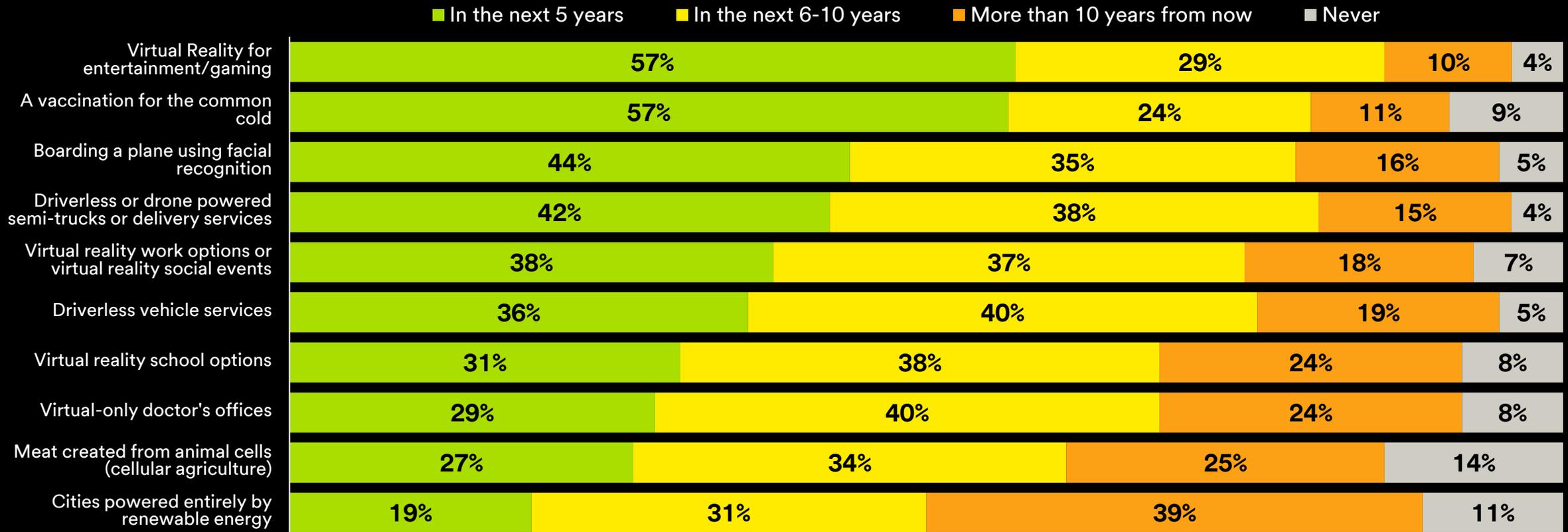
South Koreans expect technological advancements will have a similar impact in the next 10 years as they've had over the past 10 years.

Do you believe that each of the following has had a positive or negative impact on society over the past 10 years/in the next 10 years?



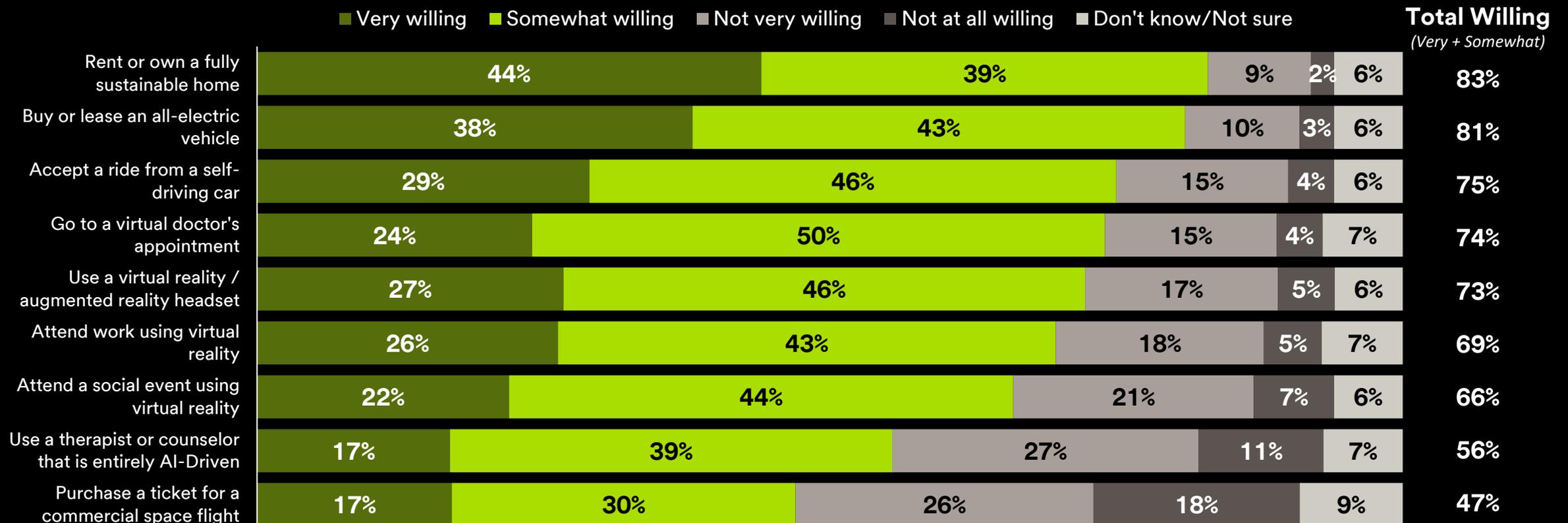
Most believe that virtual reality for entertainment or gaming and a vaccination for the common cold will be a normal part of our everyday lives sooner than other advancements.

When, if ever, do you believe each of the following advancements will become a normal part of people's everyday lives?



People are most willing to rent or own a fully sustainable home or buy/lease an all-electric vehicle and are less willing to take a commercial space flight.

How willing are you to try each of the following ?



The background features a dark purple and black color scheme with glowing purple circuit lines and a large, rounded purple rectangle in the top-left corner. The text is centered in the lower-left area.

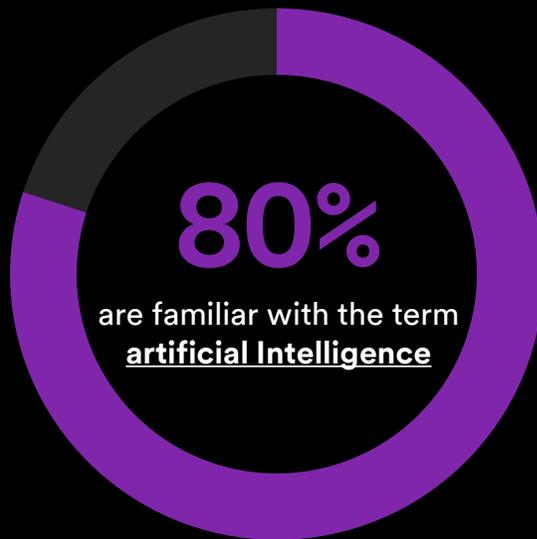
AI (Artificial Intelligence)

Most are familiar with AI and feel that it plays a significant role in their everyday lives. Most also agree the role of AI in their everyday lives will increase in the next 5 years.

How familiar are you with the terms? How big of a role do you believe artificial intelligence plays in your everyday life? In the next 5 years do you expect the role of artificial intelligence in your everyday life to increase, decrease or stay the same?

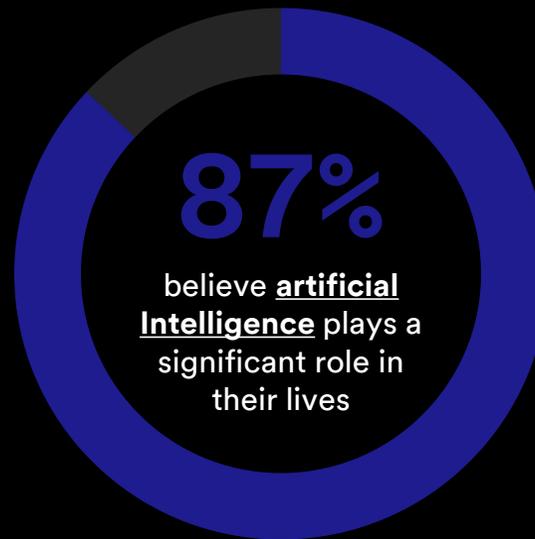
Familiarity:

(Very + Somewhat Familiar)



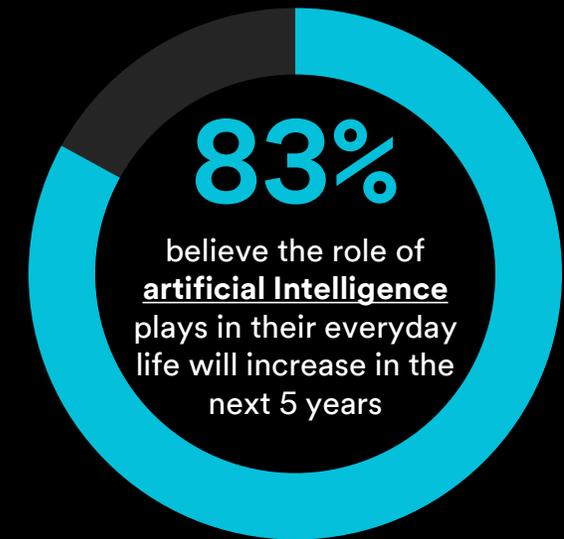
Current Role:

(Very + Somewhat Significant)



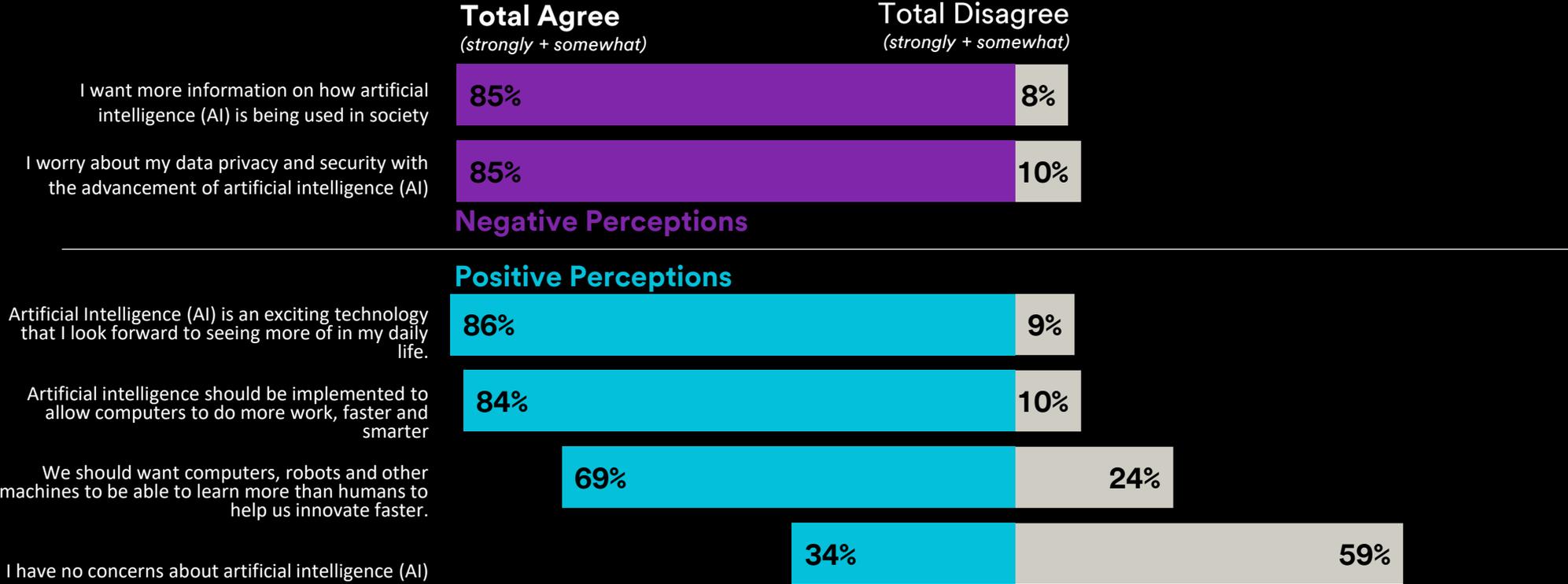
Future Role:

(Increase in the next 5 years)



Concerns over artificial intelligence outweigh optimism—South Koreans want to know more about how AI is being used in society and are worried about data privacy.

How much do you agree or disagree with each of the following statements related to artificial intelligence (AI)?



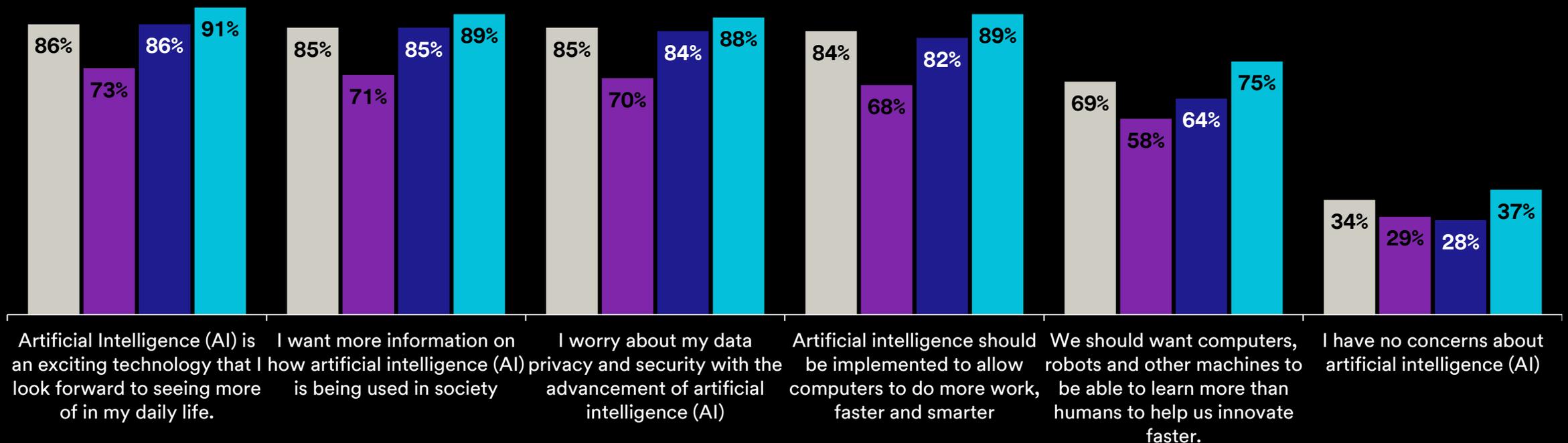
Those ages 41-65 are more likely to have a positive sentiment about AI technology, though this group also agrees that they want more information on the technology and worries about data privacy.

How much do you agree or disagree with each of the following statements **related to artificial intelligence (AI)?**

Total Agreement

(Strongly + Somewhat Agree)

■ All Adults ■ Age: 18-24 ■ Age: 25-40 ■ Age: 41-65





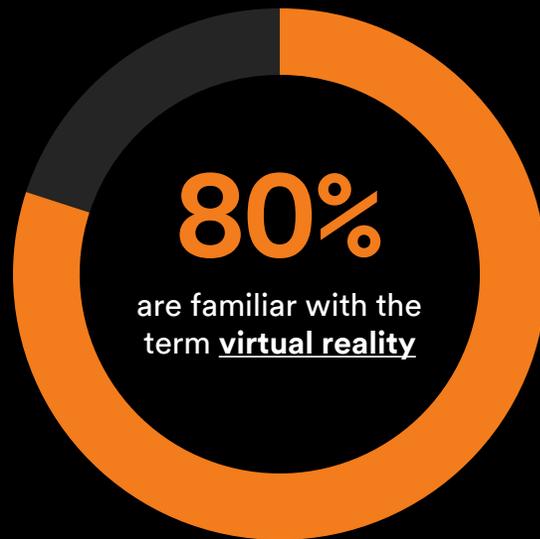
AR & VR **(Augmented Reality** **& Virtual Reality)**

Most South Koreans are familiar with VR and feel that it plays a significant role in their everyday lives. A majority also believe the role of VR in their everyday lives will increase in the next 5 years.

How familiar are you with the terms? How big of a role do you believe virtual reality plays in your everyday life? In the next 5 years do you expect the role of virtual reality in your everyday life to increase, decrease or stay the same?

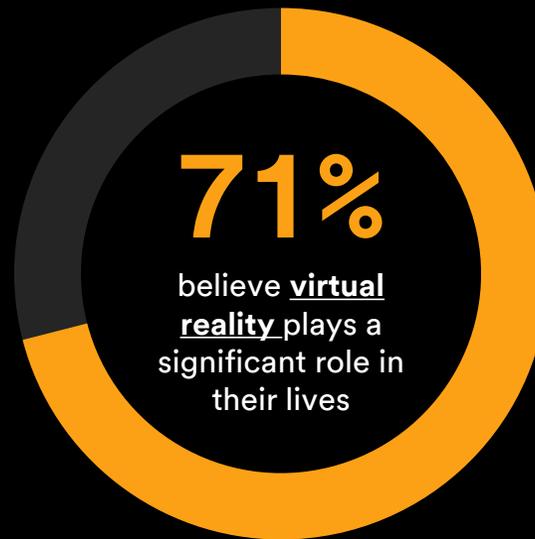
Familiarity:

(Very + Somewhat Familiar)



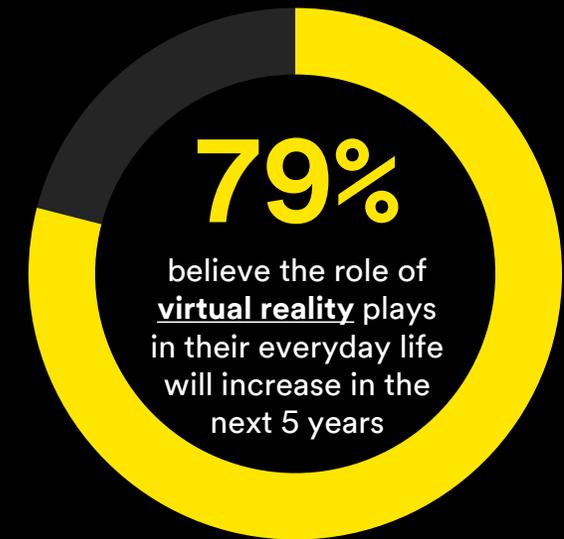
Current Role:

(Very + Somewhat Significant)



Future Role:

(Increase in the next 5 years)

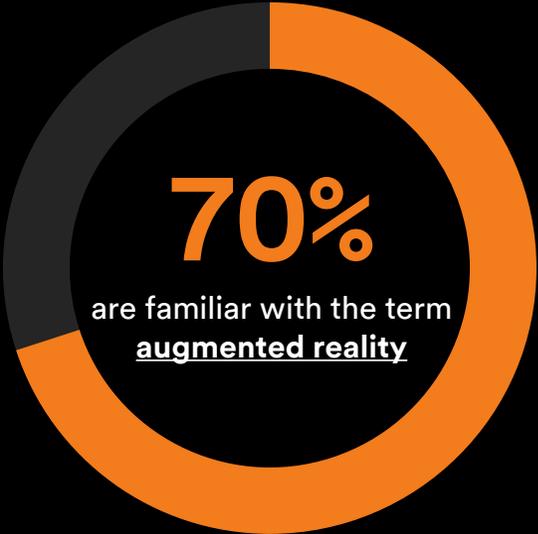


Most are familiar with AR and feel that it plays a significant role in their everyday lives. A majority believe the role of AR in their everyday lives will increase in the next 5 years.

How familiar are you with the terms? How big of a role do you believe augmented reality plays in your everyday life? In the next 5 years do you expect the role of augmented reality in your everyday life to increase, decrease or stay the same?

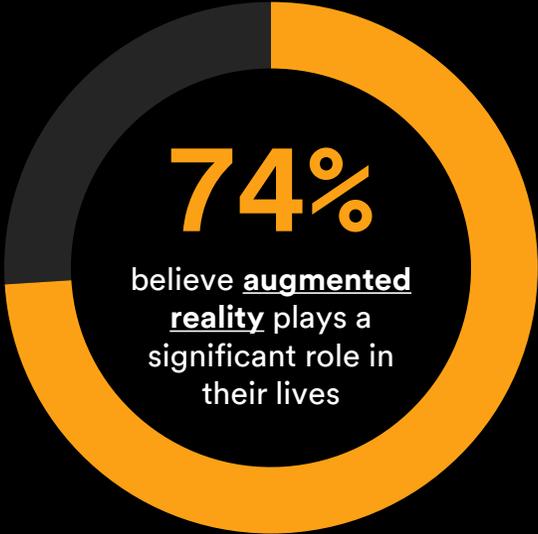
Familiarity:

(Very + Somewhat Familiar)



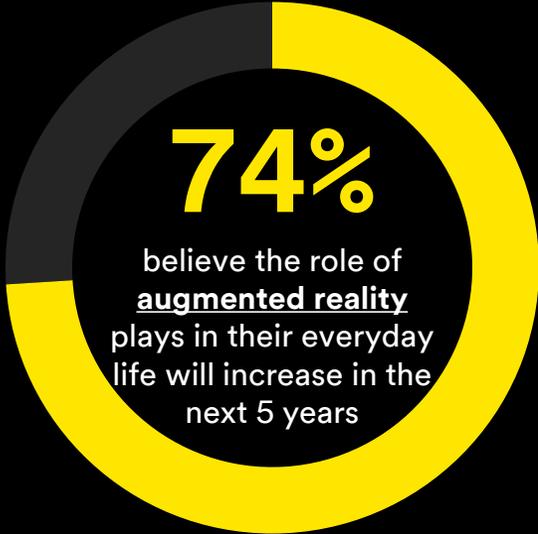
Current Role:

(Very + Somewhat Significant)



Future Role:

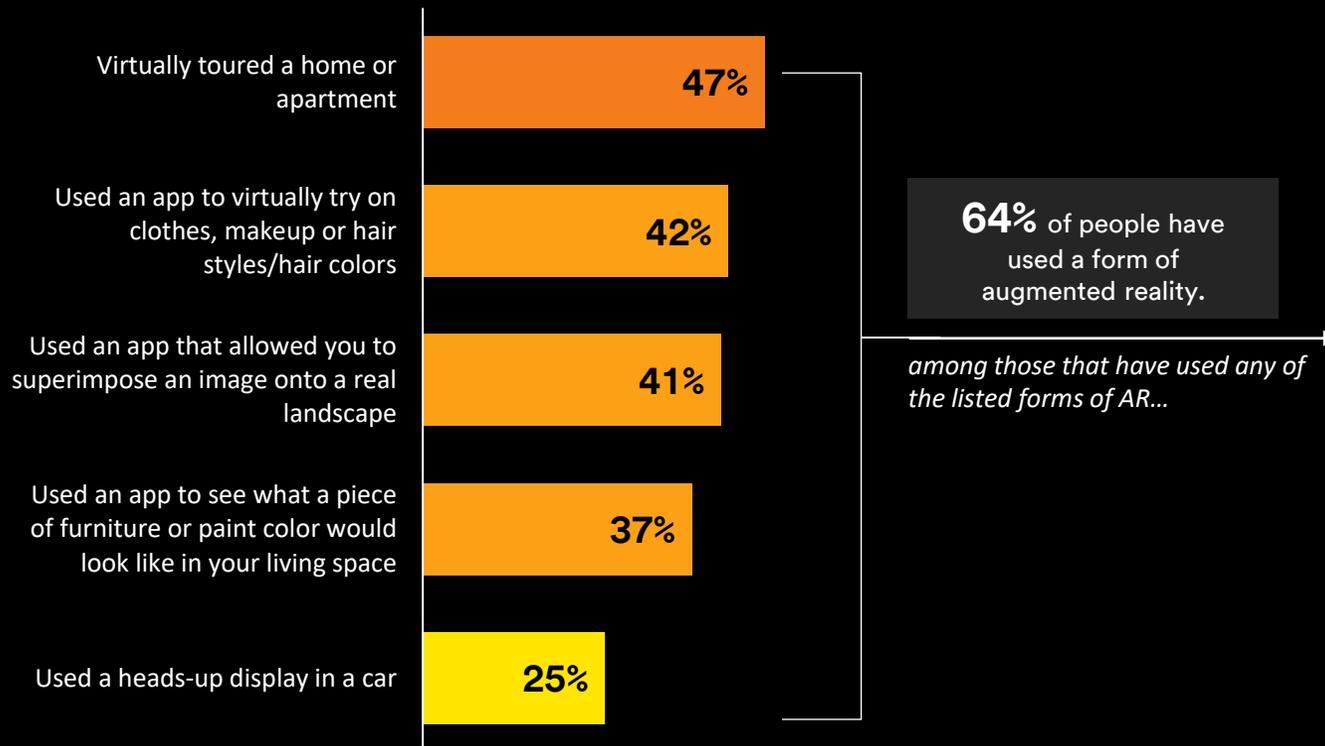
(Increase in the next 5 years)



Those who have used augmented reality before are more familiar with the term and feel it plays a more significant role in their lives compared to all respondents.

Have you ever ...? How familiar are you with the terms? How big of a role do you believe augmented reality plays in your everyday life? In the next 5 years do you expect the role of augmented reality in your everyday life to increase, decrease or stay the same?

% Have done each of the following:



Familiarity with AR

80% Total Familiar

(Very + Somewhat)

+10 vs. All Adults ▲

Current Role of AR

82% Total Significant Role

(Very + Somewhat)

+8 vs. All Adults ▲

Future Role of AR

76% Expect an Increased Role

+2 vs. All Adults

▲ Indicates positive movement outside of the MOE

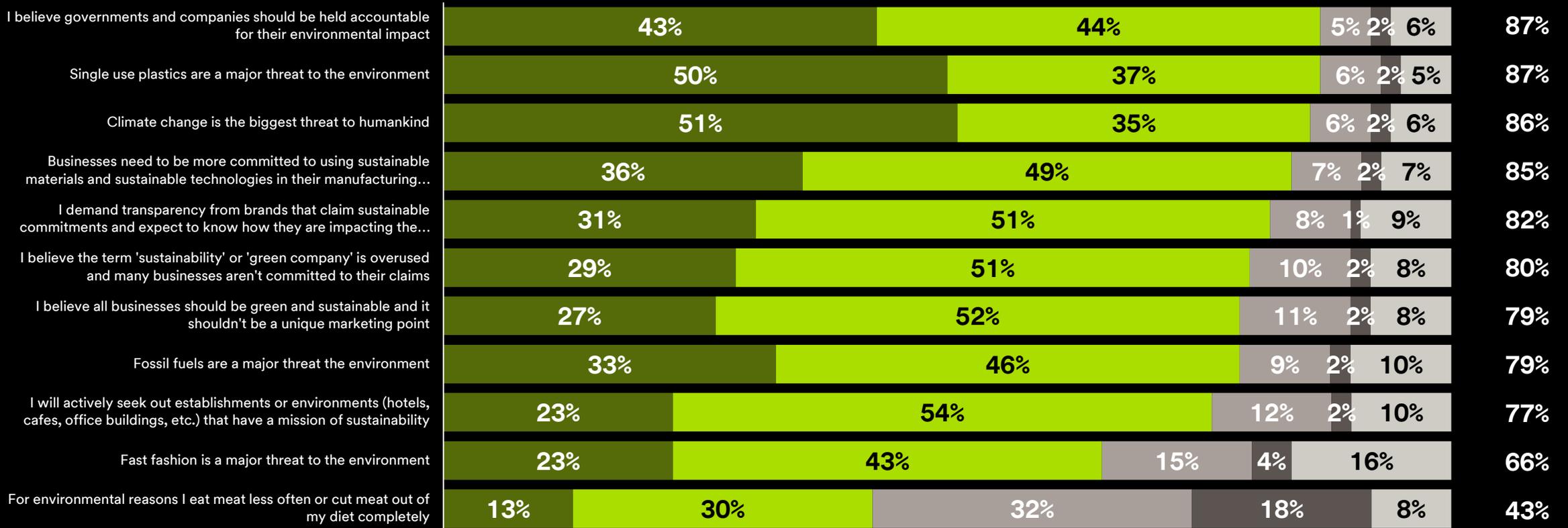
The image features a black background with several overlapping, dark green leaf shapes on the left side. The leaves are stylized and have a smooth, rounded appearance. The word "Sustainability" is written in a bold, white, sans-serif font across the middle of the image, partially overlapping the green leaves.

Sustainability

Half of South Koreans strongly agree that single-use plastics are a major threat to the environment and that climate change is the biggest threat to humankind.

How much do you agree or disagree with each of the following statements?

■ Strongly agree
 ■ Somewhat agree
 ■ Somewhat disagree
 ■ Strongly disagree
 ■ Don't know / No opinion
 Total Agreement
(Strongly + Somewhat)



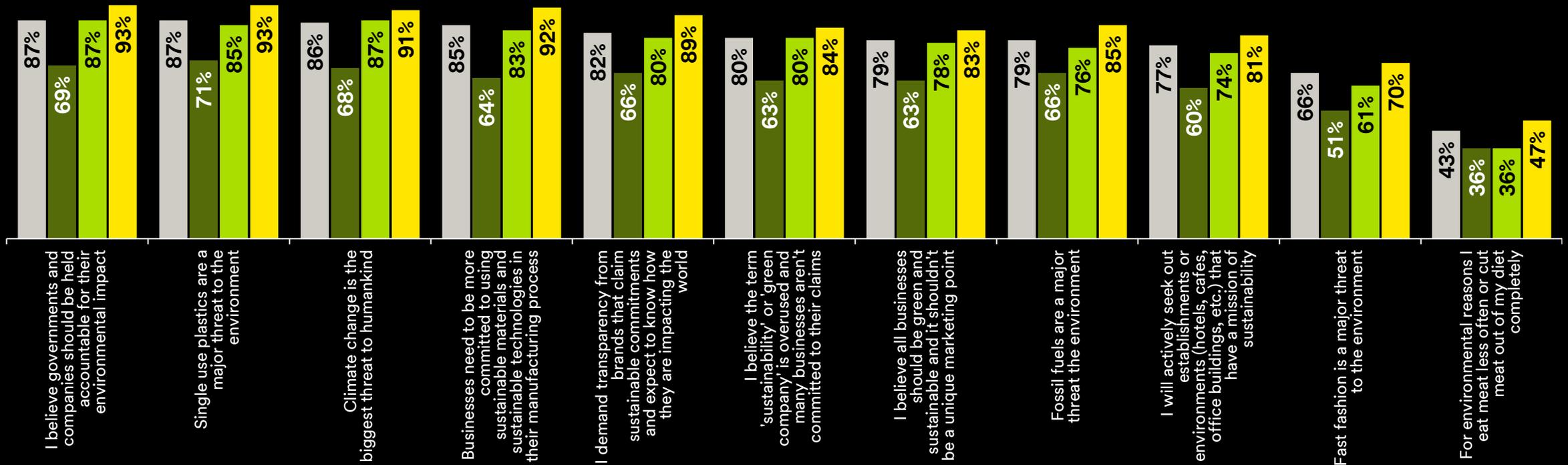
Those ages 41-65 are more likely to agree with each pro-environmental statement than those under 40.

How much do you agree or disagree with each of the following statements?

Total Agreement

(Strongly + Somewhat Agree)

■ All Adults ■ Age: 18-24 ■ Age: 25-40 ■ Age: 41-65



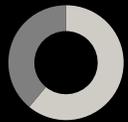


New Paradigm

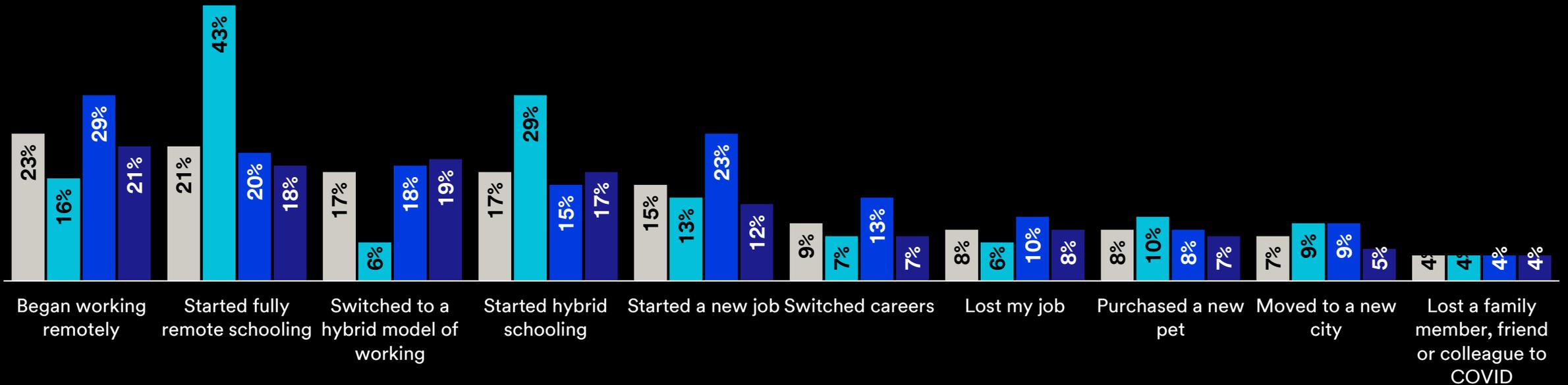
A majority have experienced a significant life change as a result of the pandemic. Those ages 18-24 are more likely to have started fully remote or hybrid schooling than other groups.

As a result of the pandemic, have you experienced any of the following?

■ All Adults ■ Age: 18-24 ■ Age: 25-40 ■ Age: 41-65

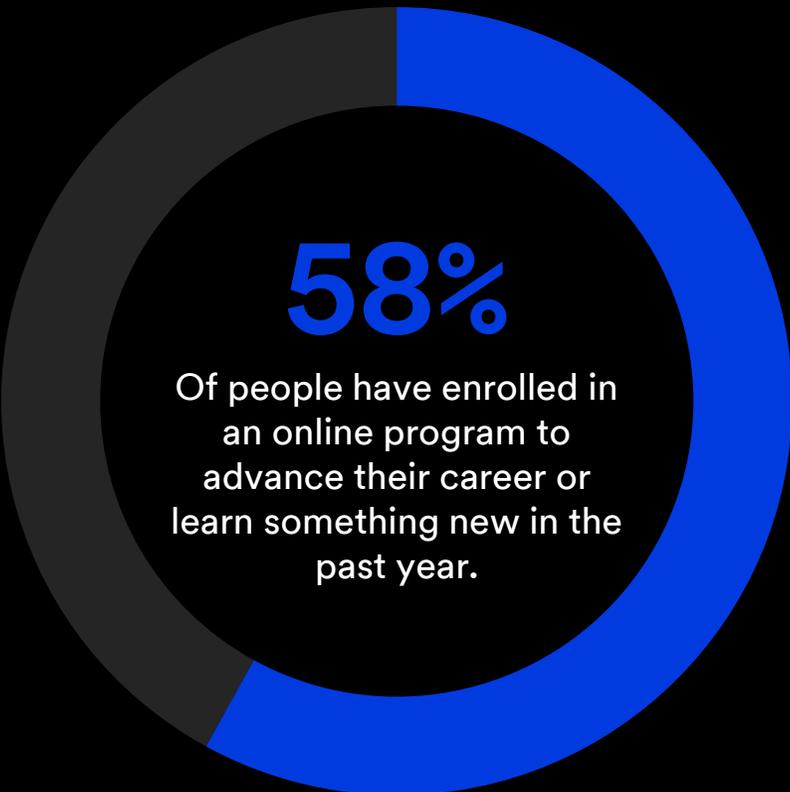


68% Of people have experienced a significant life change as a result of the pandemic



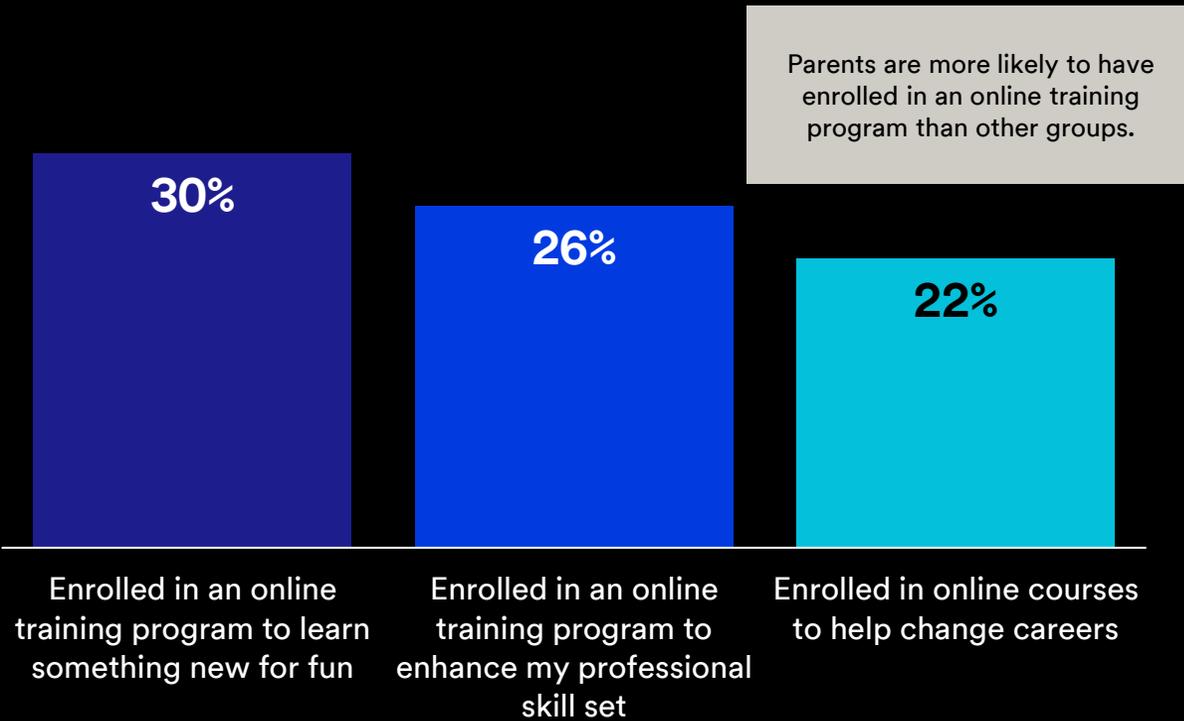
In the past year, over half of South Koreans enrolled in an online training program to advance their career or learn something new.

In the past year have you done any of the following?



What did they enroll in?

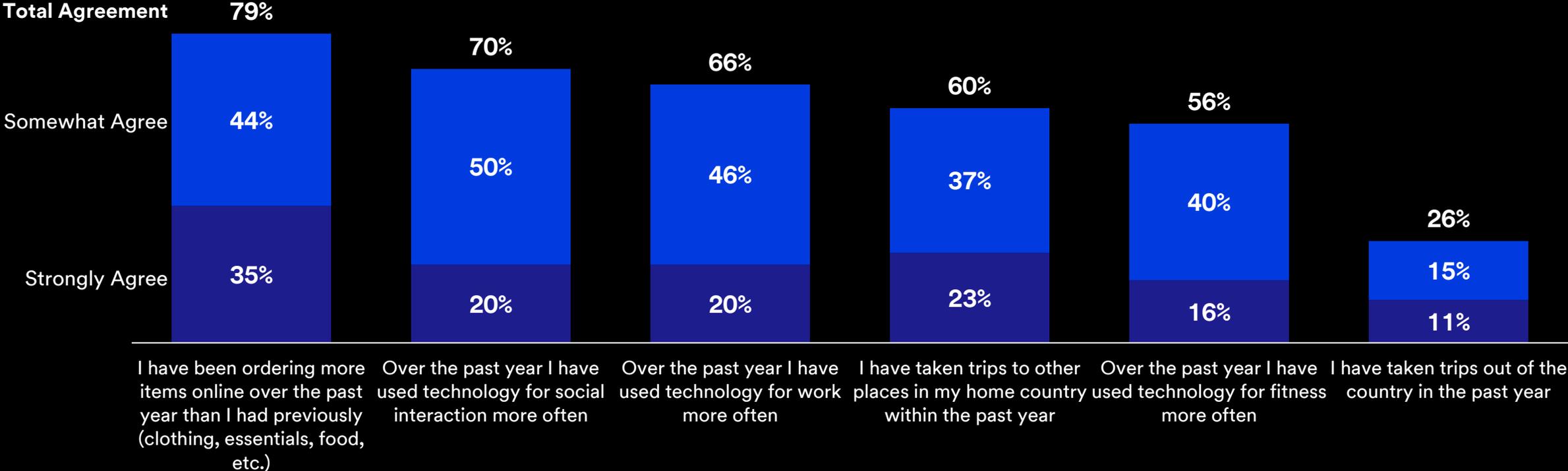
(among all respondents)



Parents are more likely to have enrolled in an online training program than other groups.

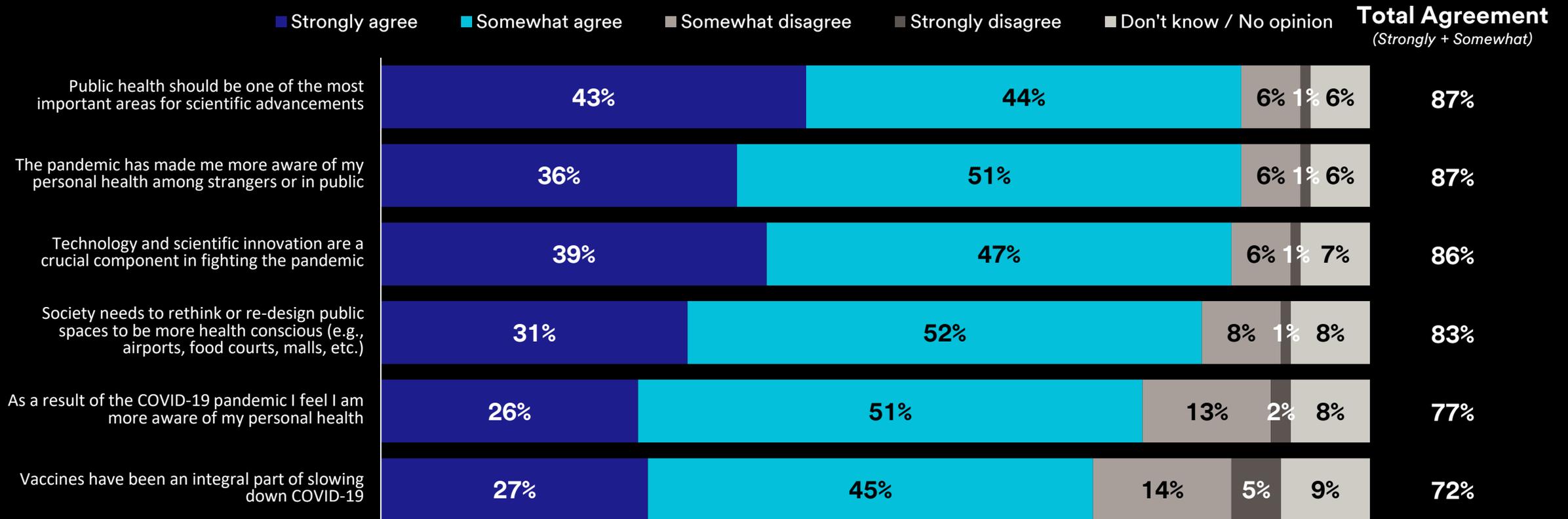
Over the past year, most have ordered more items online, used technology more often for social interaction, and used technology for work more often than they had previously.

How much do you agree or disagree with each of the following statements?



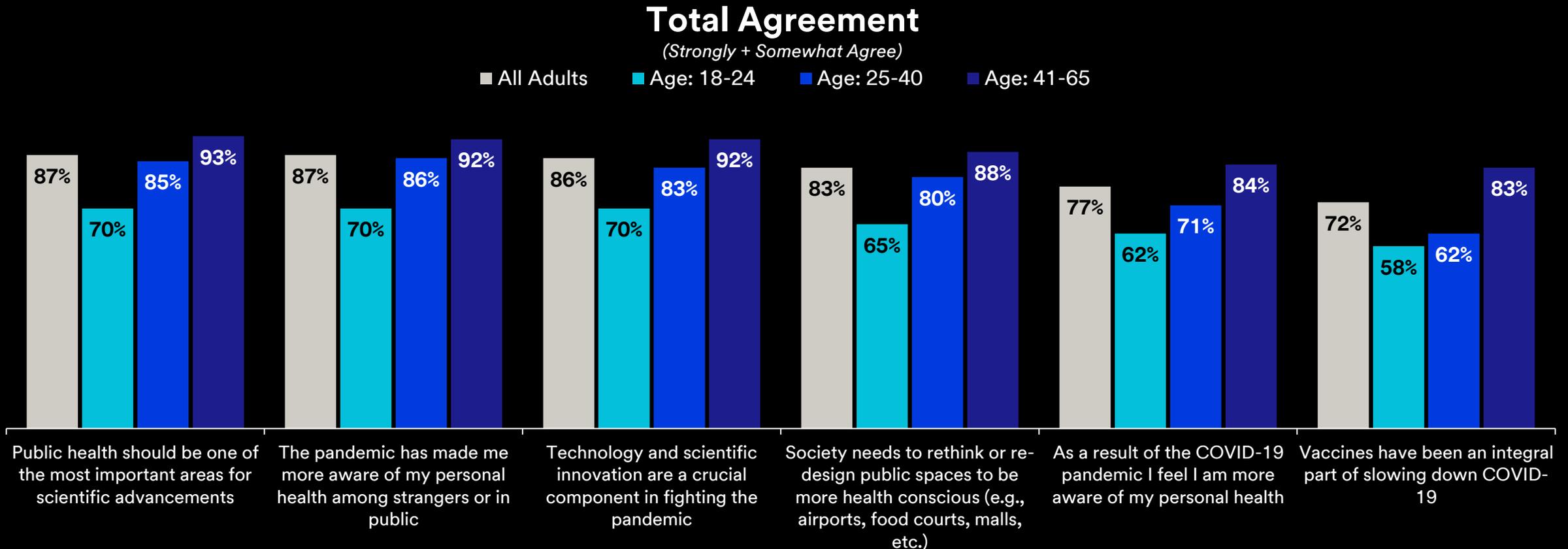
The pandemic has impacted how most South Koreans view public health and the role of science and technology in keeping people safe.

How much do you agree or disagree with each of the following statements?



Those ages 41-65 are more likely to agree with statements related to impact science and technological advancements on public health – especially that vaccines have been an integral part of slowing down COVID-19.

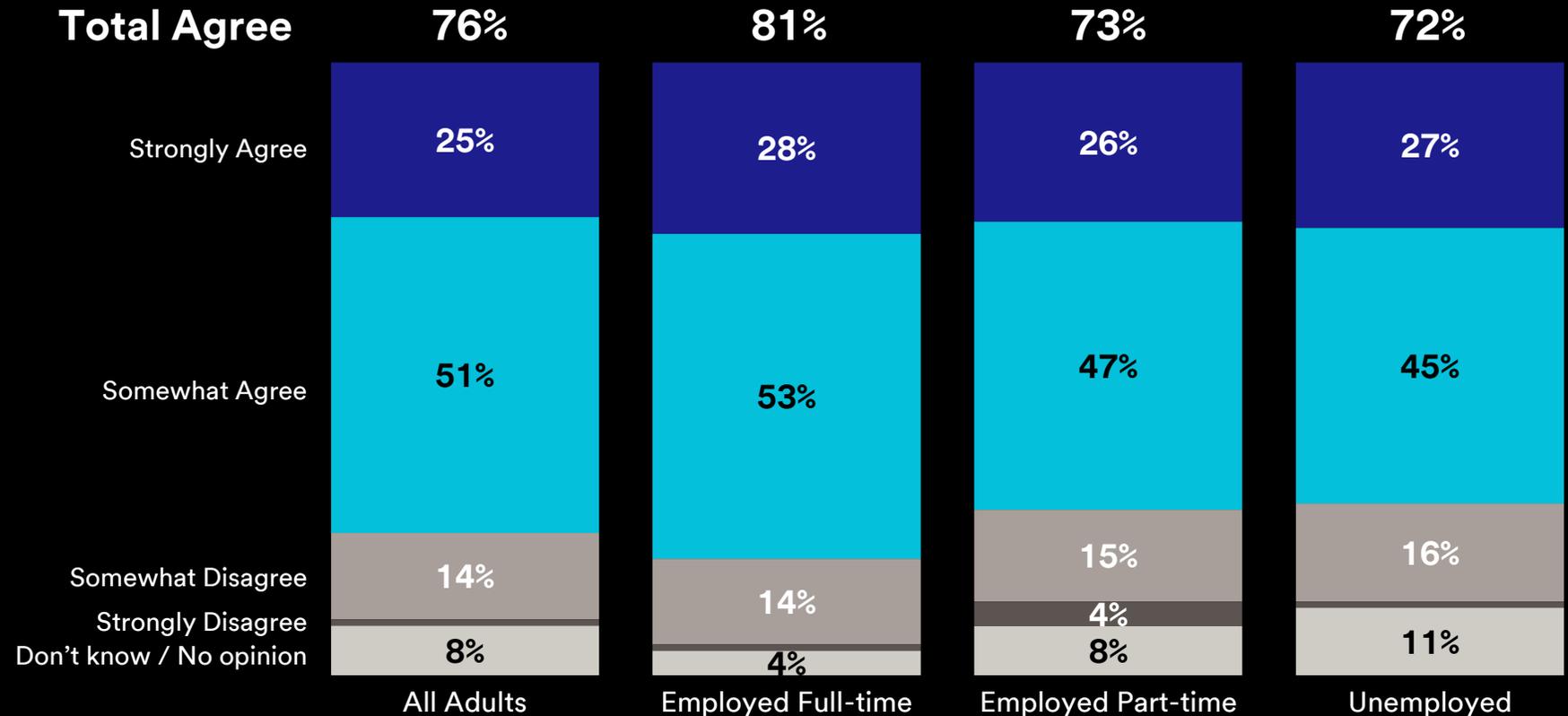
How much do you agree or disagree with each of the following statements?



Most agree science and technology during the pandemic have changed the work environment forever.

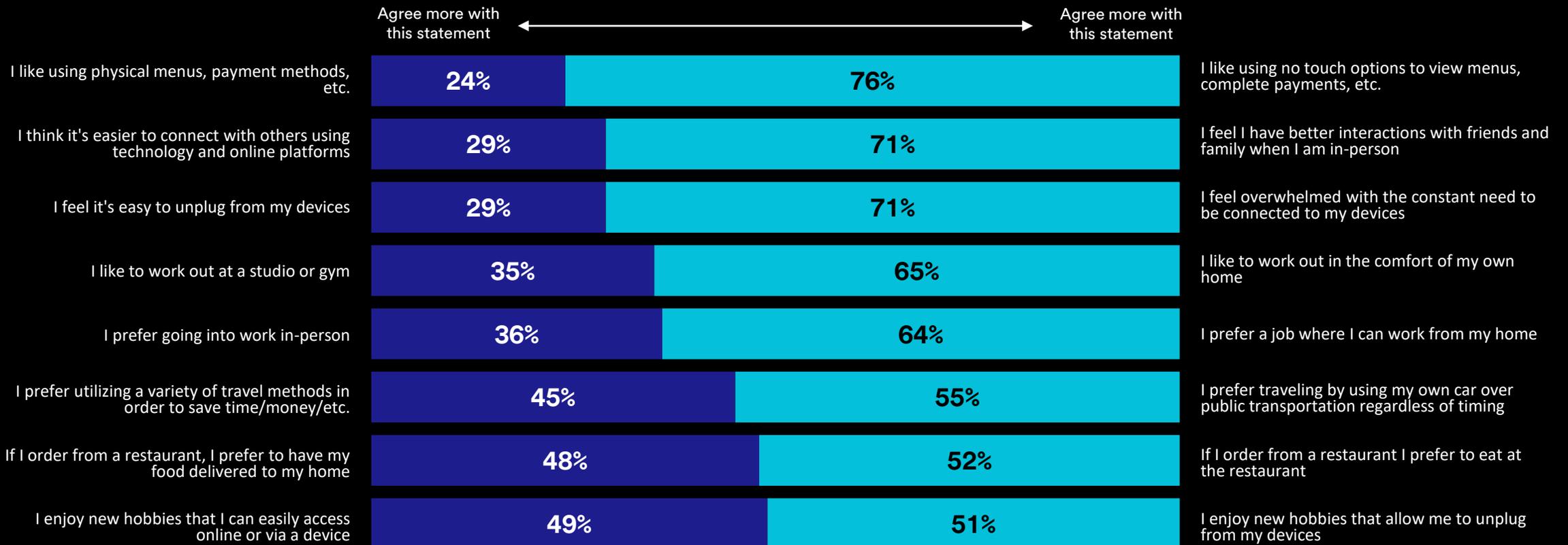
How much do you agree or disagree with each of the following statements?

“Science and technology advancements during the pandemic have changed our work environment forever.”



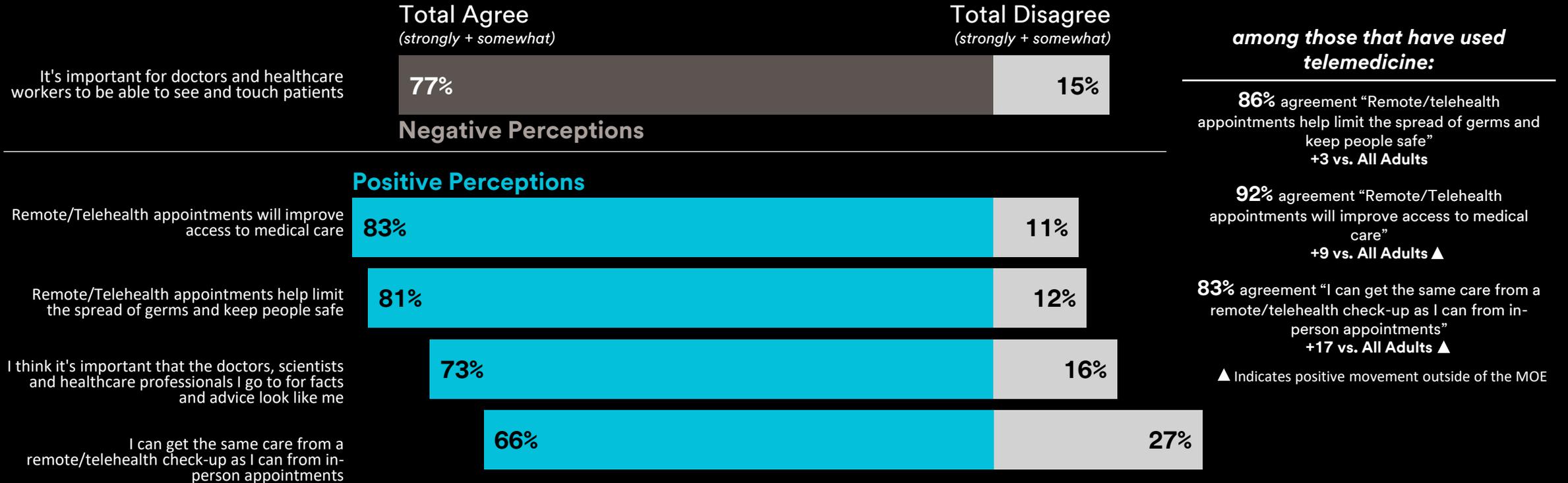
People prefer in-person socialization to virtual or online alternatives. However, South Koreans are split on hobbies that they can access via a device versus new hobbies that allow them to unplug for their devices.

Which of the following statements align more with how you currently feel?
among those who chose one statement over the other



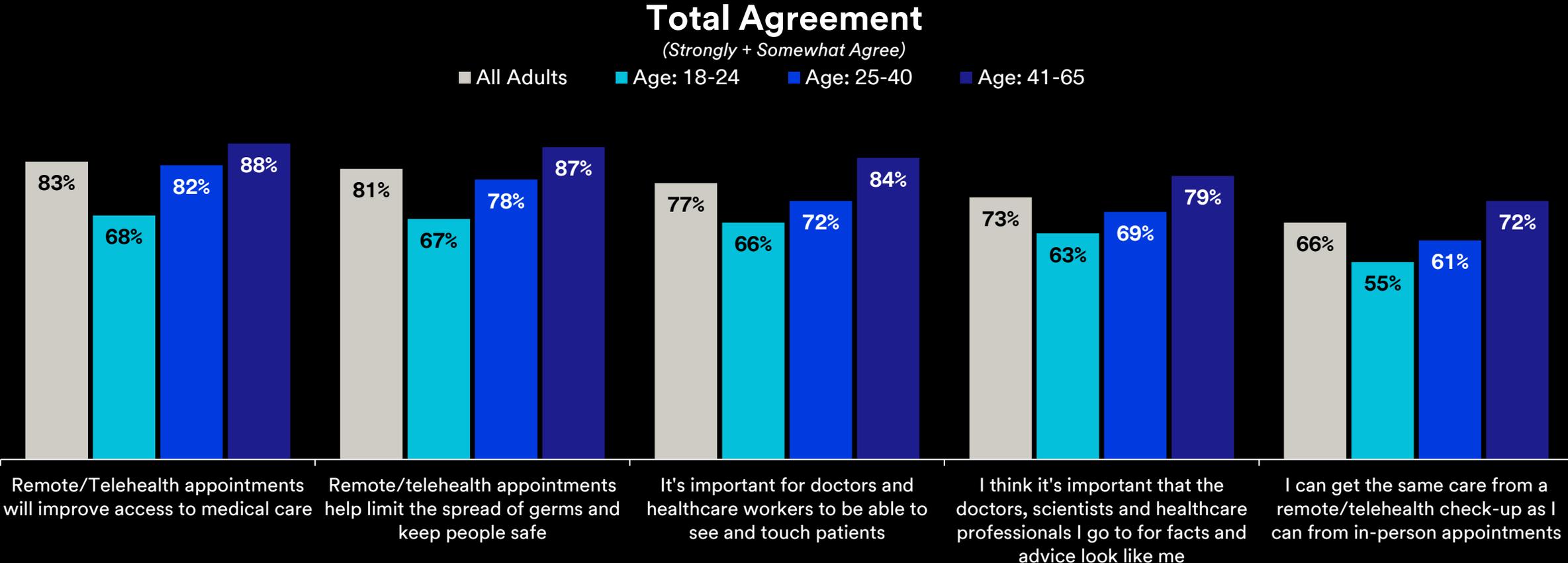
South Koreans are split on how they feel about remote/telehealth with many agreeing that telehealth improves access and can keep people safe, but most also agree that it's important for doctors to see and touch patients.

How much do you agree or disagree with each of the following statements?



Those 25-65 are more likely to agree with pro-telehealth statements however they are also more likely to agree that it's important for doctors to be able to see and touch patients than those under 25.

How much do you agree or disagree with each of the following statements?





Thank you