



3M | Futures

India Survey Results

India

The 3M Futures Study was conducted in India to understand perceptions of science and technology innovation—and its role in India’s 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

Indian residents want innovation in science and technology to focus on environmental and societal problems and broader global crises. Indian adults are split on which crises to tackle first, emphasizing that extreme weather, humanitarian crises, global pandemics, and ecological disasters are all important to prioritize in the next five years.

2

Many Indian adults agree that that too much screen time is a health issue that needs to be addressed and that as a society they are too dependent on technology in their everyday lives. Overall, Indian residents tend to both strongly agree with the benefits of science and technology innovations as well as strongly agree with the possible drawbacks.

3

Although Indian adults are worried about the drawbacks of technology on their everyday lives, most also want science and technology to increase convenience and rate access to information and consumption of social media as a net positive impact on society.

Methodology: This poll was conducted between December 3-13, 2021 among a sample of 2,000 Adults. The interviews were conducted online. 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 Indian residents are aware of artificial intelligence and believe it is significant 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 5-10 years.

2 While there is excitement around AI technology, Indians 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 December 3-13, 2021 among a sample of 2,000 Adults. The interviews were conducted online. 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

Augmented reality has high familiarity in India. Most Indian residents say augmented reality plays a significant role in their lives and report using some form of augmented reality.

- A majority have used some form of augmented reality and those who have are more likely to be familiar and feel that it plays a significant role in their life.

2

Indian residents are highly aware of virtual reality and believe that the significance of virtual reality will increase in the next five years. Indian residents expect that virtual reality for entertainment/gaming, work events, and social events will become a normal part of everyday people's lives sooner than other advancements. Most Indian adults are willing to try virtual reality headsets or attend a virtual reality social event.

Methodology: This poll was conducted between December 3-13, 2021 among a sample of 2,000 Adults. The interviews were conducted online. 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

89% of Indian residents agree that climate change is the biggest threat to humankind. Most Indian adults want transparency from brands that claim sustainable commitments and believe governments and companies should be held accountable for their environmental impact and sustainable production.

2

Indian residents are more likely than other countries to eat meat less often or cut meat out of their diet completely for environmental reasons.

Methodology: This poll was conducted between December 3-13, 2021 among a sample of 2,000 Adults. The interviews were conducted online. 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 impacted the lives of Indian residents, leaving room for innovation. 93% of Indian adults have experienced a significant life change as a result of the pandemic, and most residents are more health conscious and more reliant on technology than they were previously.

- Innovations around public health are important to Indian residents as one-third of Indian adults have lost a family member, friend or colleague to COVID.

2

Most Indian residents say that the pandemic has changed our work environment forever and prefer working from home to going into an office but are also overwhelmed with the constant need to be connected to devices.

- While many have been interacting more virtually than they had previously, most prefer in-person socialization and hobbies.

3

Most Indians agree that telehealth limits the spread of germs and improves access to care but they also agree that it's important for doctors to be able to see and touch patients.

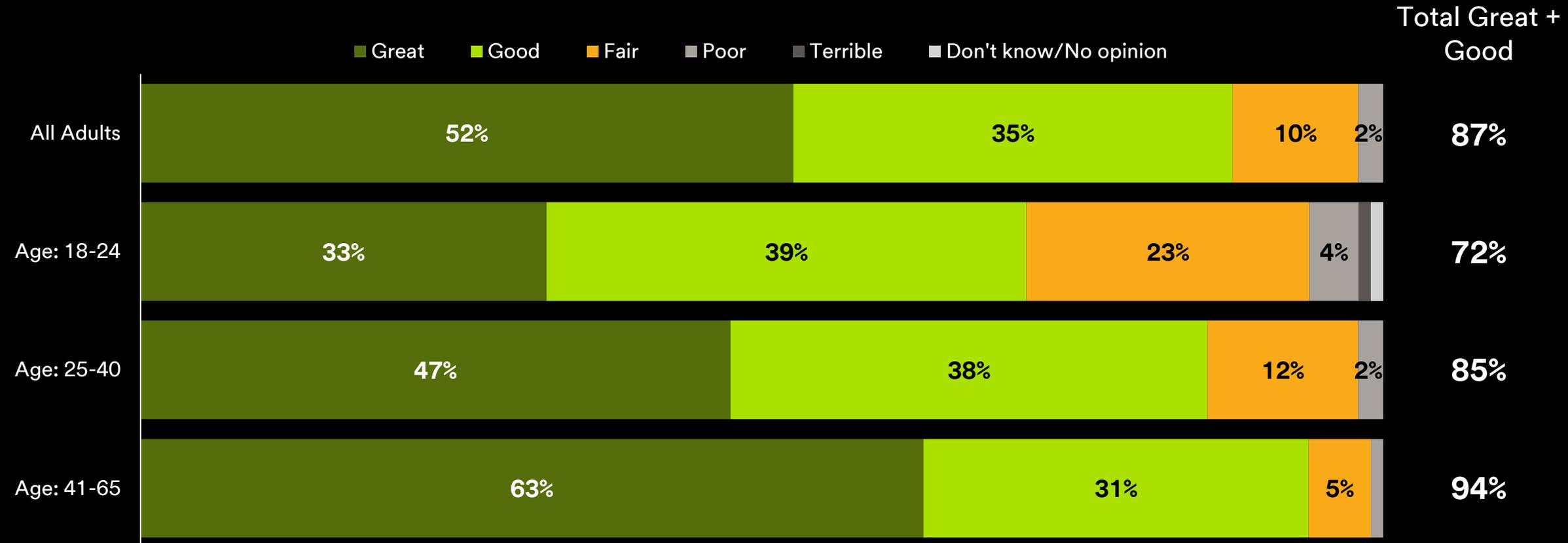
Methodology: This poll was conducted between December 3-13, 2021 among a sample of 2,000 Adults. The interviews were conducted online. An oversample of N=200 of was also fielded among those 18-24 – The interviews were conducted online. Results from the full survey have a margin of error of plus or minus 2 percentage points.



Science & Technology Perceptions

Most believe India is at least 'good' at providing technological access for its citizens. Indians aged 18-24 are less likely to rate India highly, but still overall believe India is doing well.

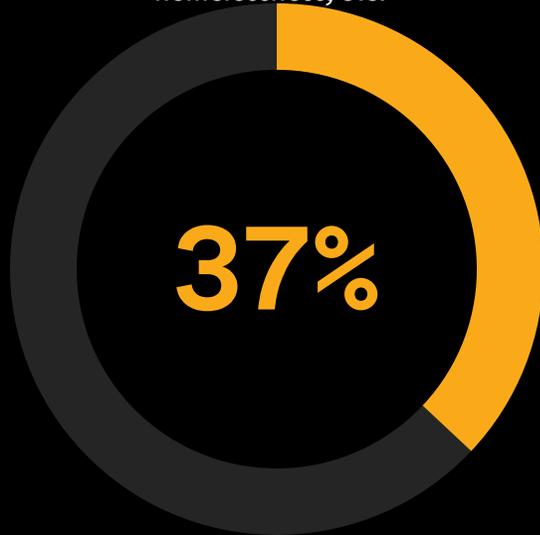
How would you rate India on technological access for its citizens?



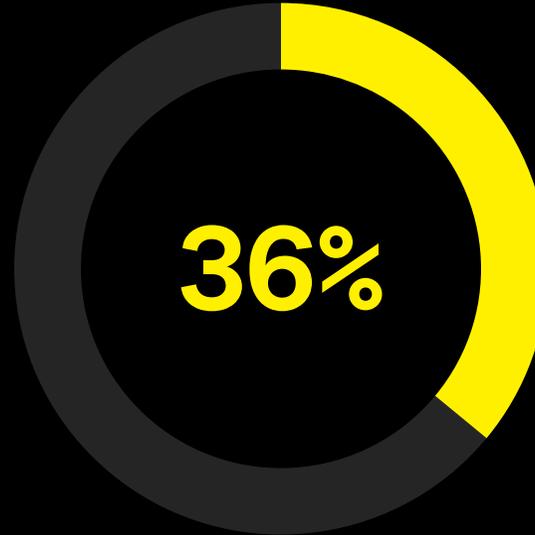
Indian residents are split on the primary focus of science and technological innovation. Most believe innovation should focus on environmental/societal problems or global crises.

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

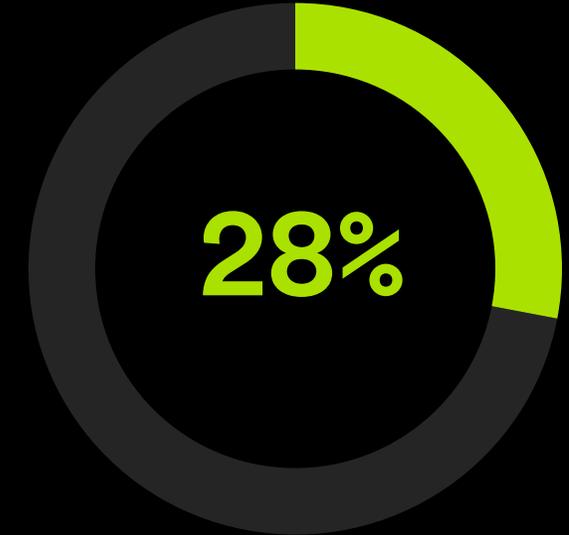
“Find solutions to today’s **environmental and societal problems**, including climate change, sustainability, social injustice, clean water access, homelessness, etc.”



“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.”



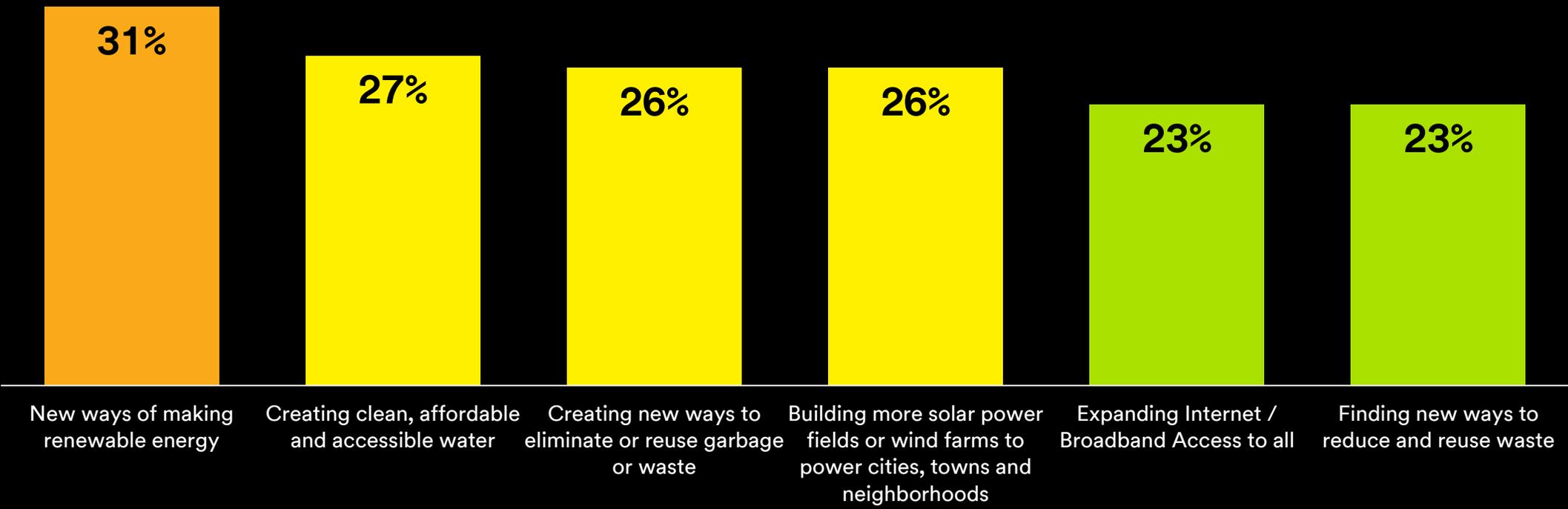
“**Advance the human race to achieve the impossible**, seeing how far we can innovate to create a futuristic and convenient world.”



Indian adults think science and technology innovation should prioritize new ways of making renewable energy.

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:

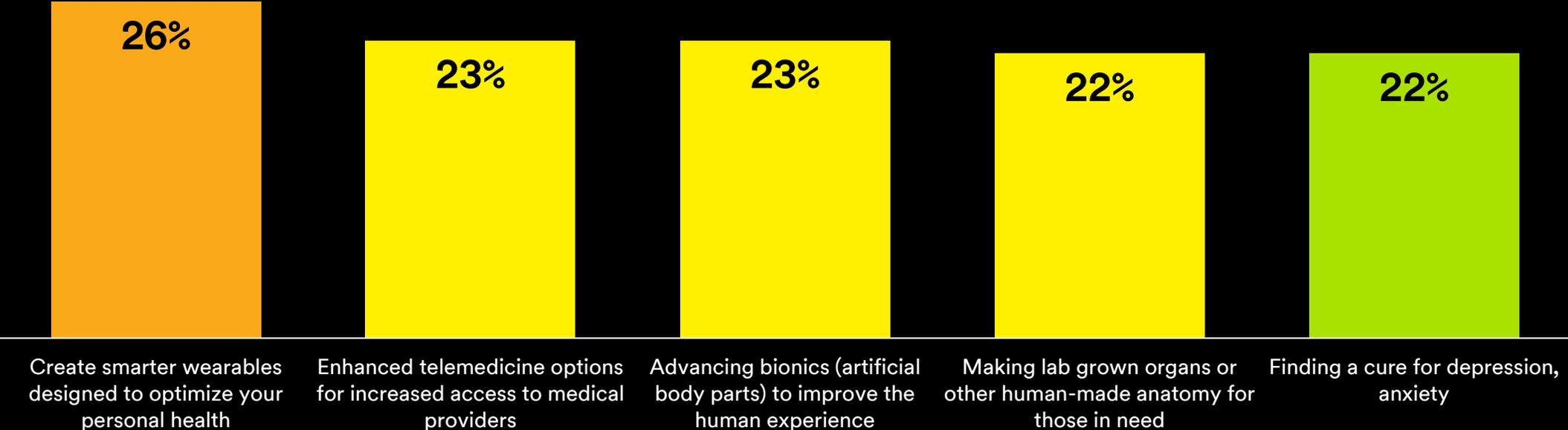


*Expanding internet / broadband access to all and finding new ways to reduce and reuse waste are both included since they have the same % and are tied for the 5th selected response.

Indian adults are split on what human developments are most important for innovation. A plurality chose creating smarter wearables to optimize personal health.

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.

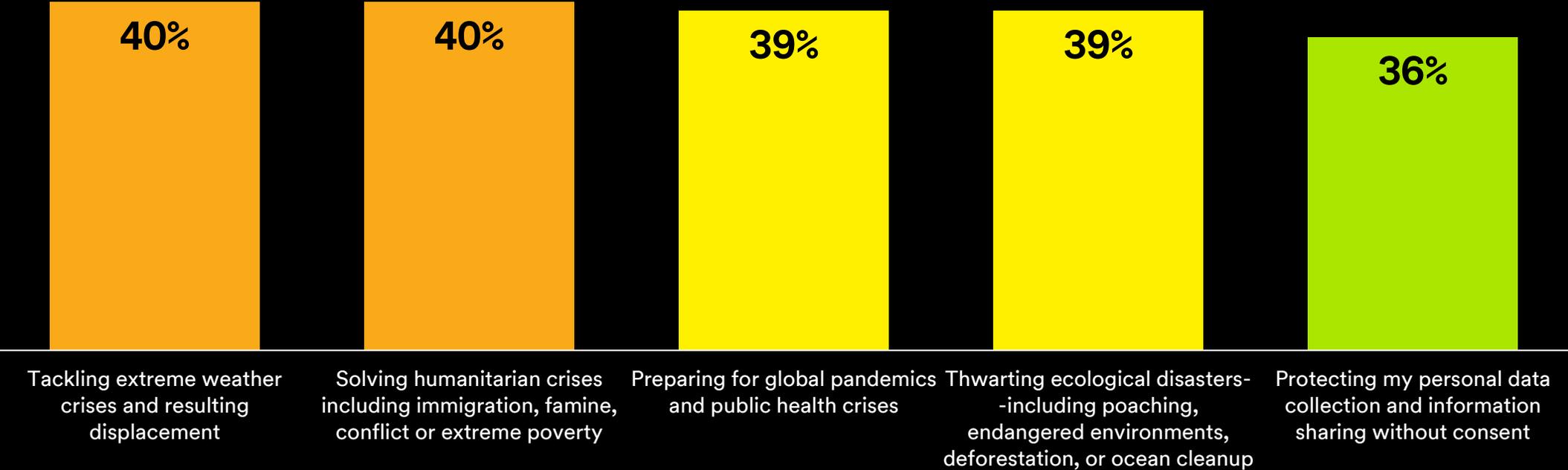
Top 5 selected:



Indian residents are most likely to prioritize solving weather, humanitarian, and global health crises as well as thwarting ecological disasters with science and tech innovation.

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:



Indian adults 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?

 **91%**

of people agree...

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

 **88%**

of people agree...

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

 **91%**

of people agree...

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

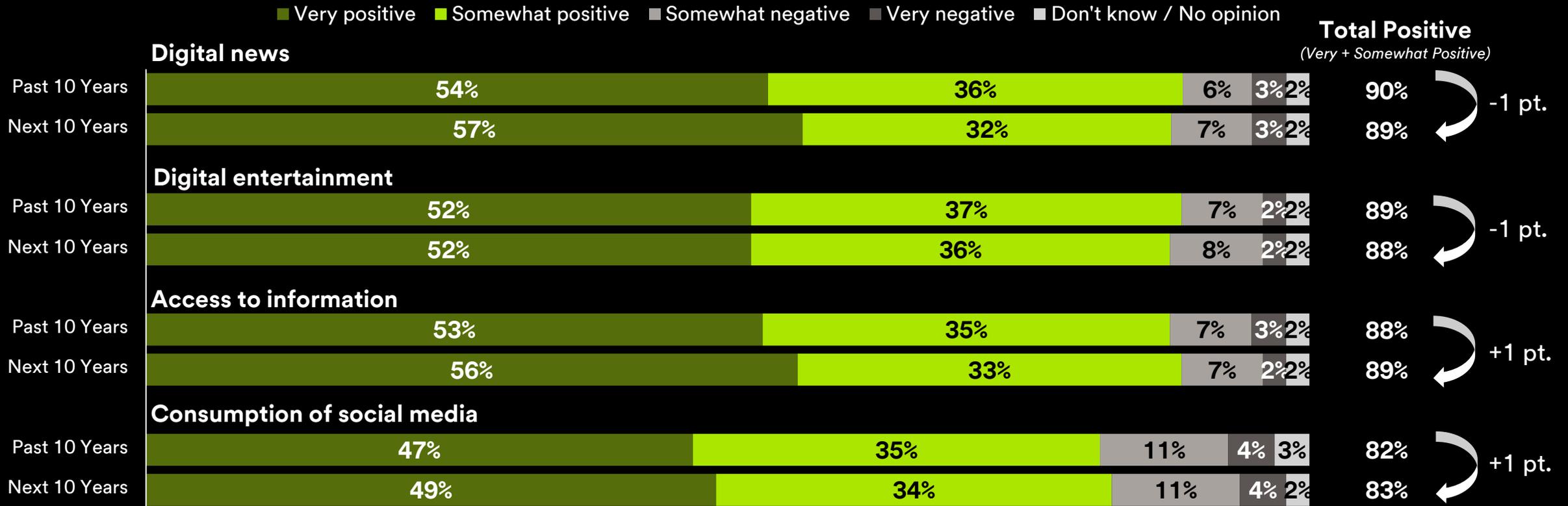
 **89%**

of people agree...

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

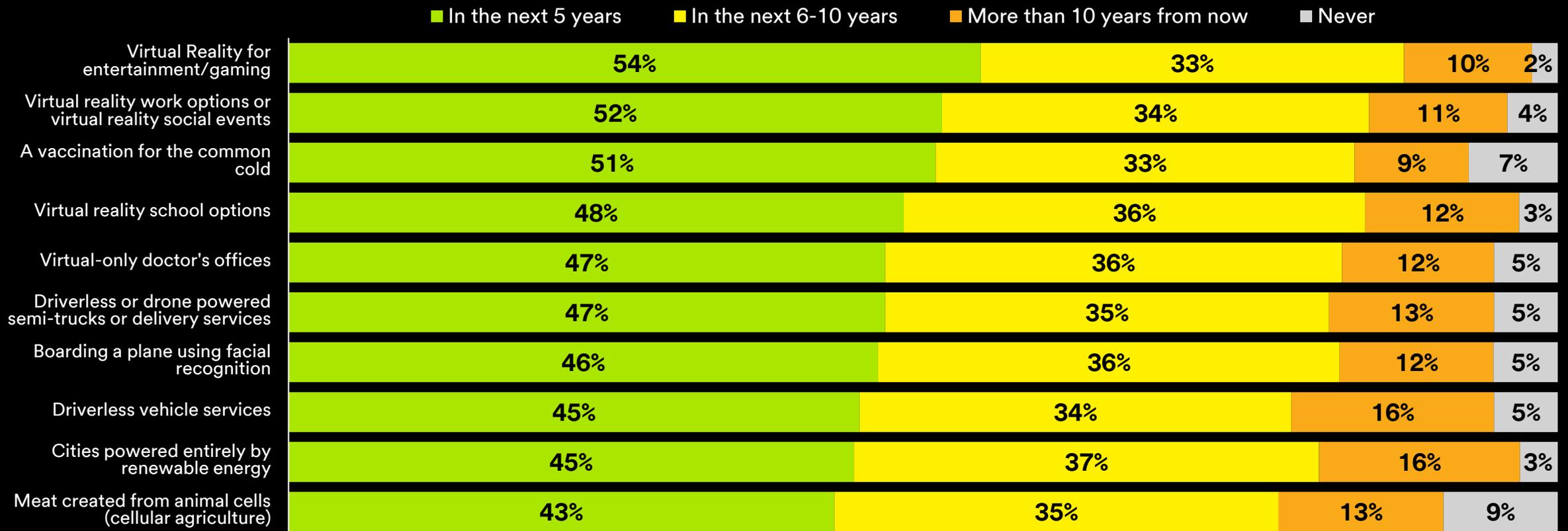
Indian residents believe various forms of technology have had a positive impact on society over the past 10 years and will continue to.

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?



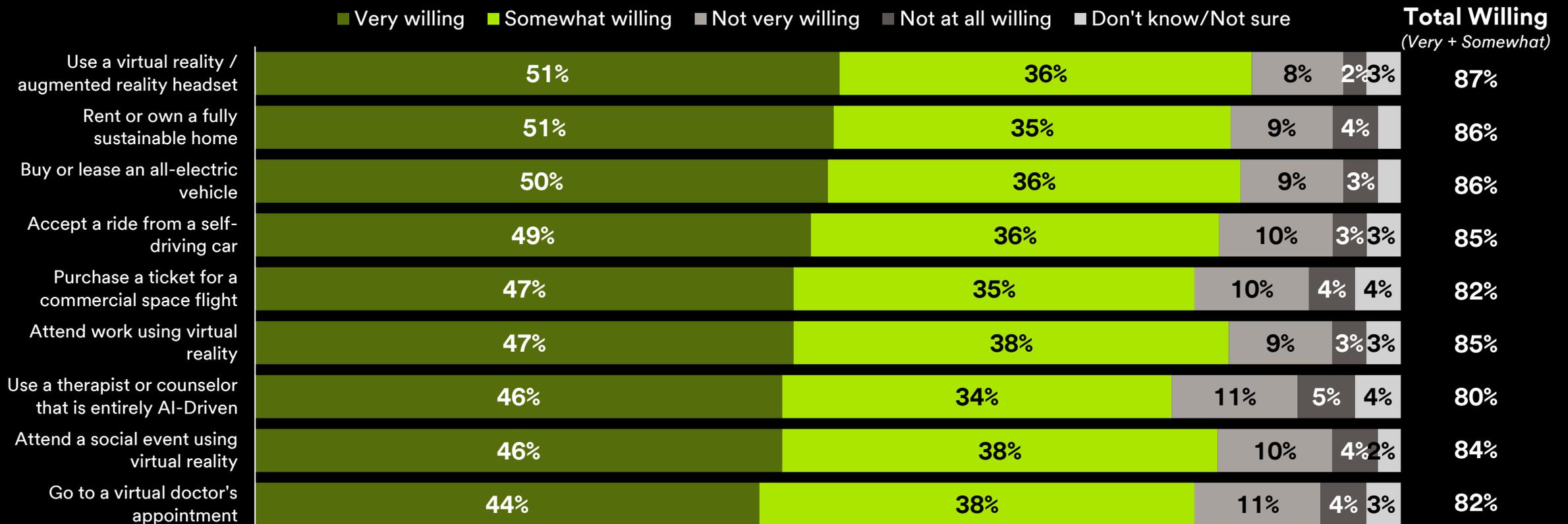
Indian residents expect that virtual reality and a vaccination for the common cold will become a normal part of people's everyday lives sooner than other advancements.

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



Most Indian residents are willing to try various forms of technology and are most willing to use a VR/AR headset, rent or own a sustainable home, and buy or lease an all-electric vehicle.

How willing are you to try each of the following ?



The image features a dark background with a glowing purple circuit board pattern. A large, solid purple rounded rectangle is positioned in the top-left corner. The text "AI (Artificial Intelligence)" is displayed in a bold, white, sans-serif font, centered horizontally and partially overlapping the purple rectangle and the circuit lines.

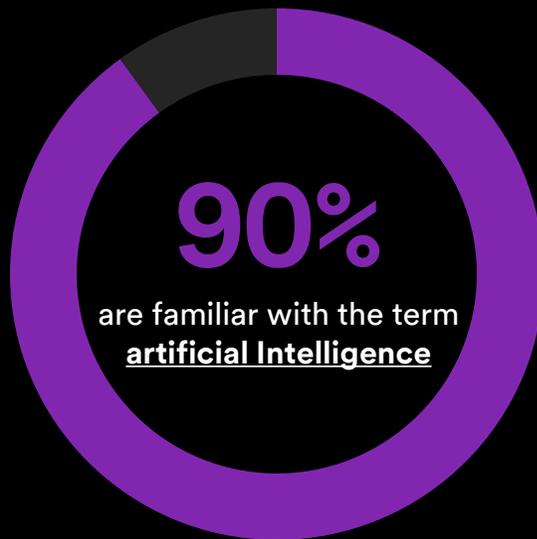
AI (Artificial Intelligence)

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?

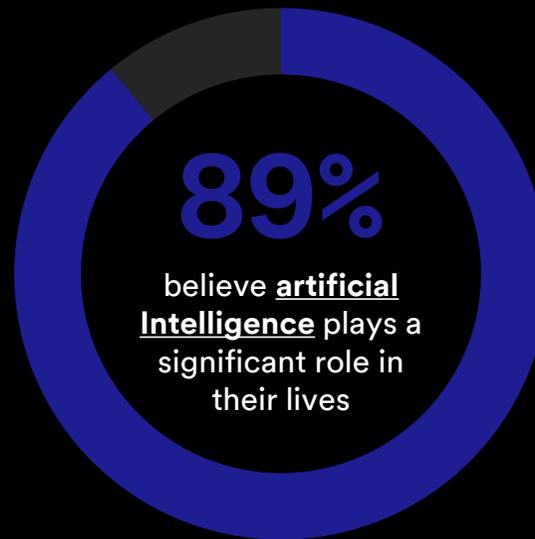
Familiarity:

(Very + Somewhat Familiar)



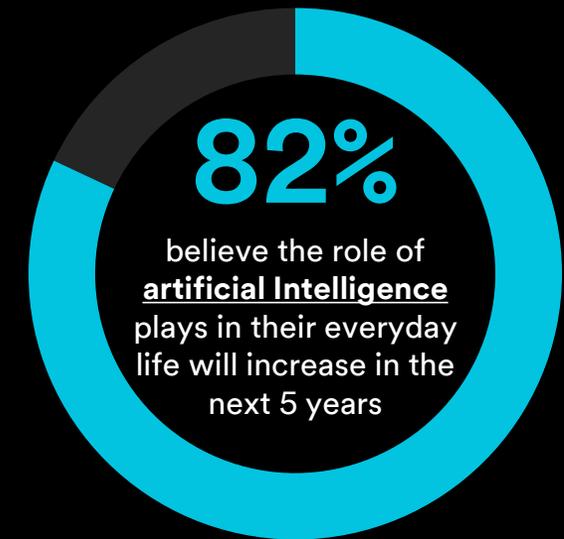
Current Role:

(Very + Somewhat Significant)



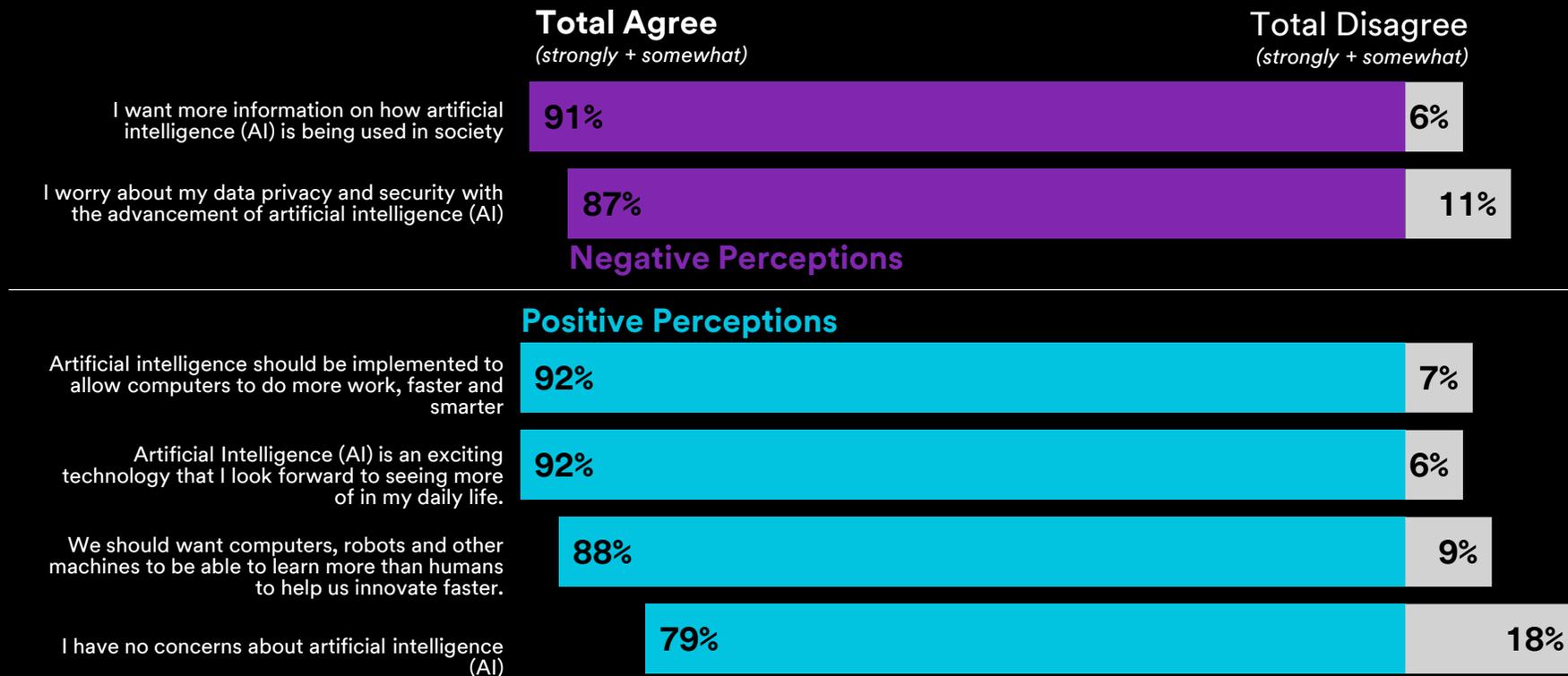
Future Role:

(Increase in the next 5 years)



Indian residents are split on AI perceptions. Nearly all want more information about AI and have data privacy concerns, but also believe AI is exciting and should be implemented.

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



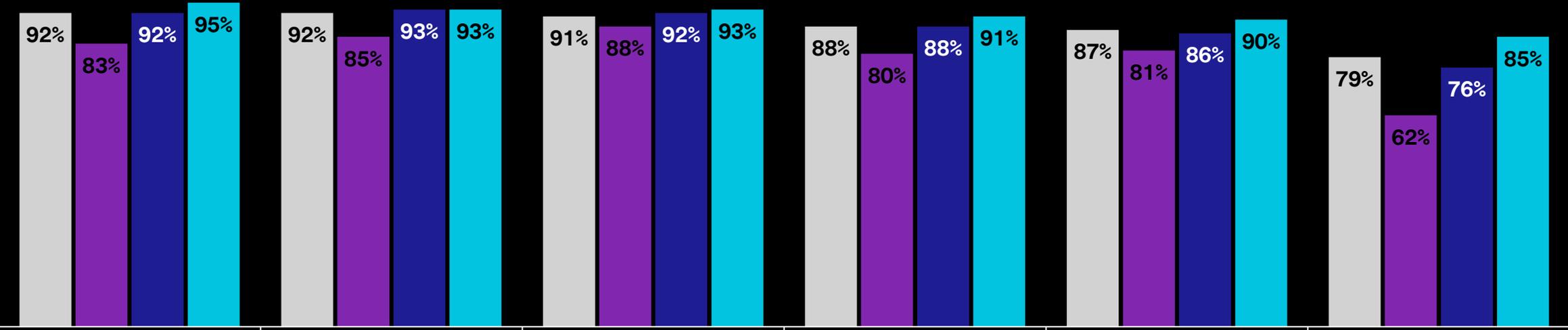
Those aged 25+ are more likely to have a positive sentiment about AI technology, though this group also agrees that they want more information on the technology and worries about data privacy.

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

Total Agreement

(Strongly + Somewhat Agree)

■ Global Average ■ Age: 18-24 ■ Age: 25-40 ■ Age: 41-65



Artificial Intelligence (AI) is an exciting technology that I look forward to seeing more of in my daily life.

Artificial intelligence should be implemented to allow computers to do more work, faster and smarter

I want more information on how artificial intelligence (AI) is being used in society

We should want computers, robots and other machines to be able to learn more than humans to help us innovate faster.

I worry about my data privacy and security with the advancement of artificial intelligence (AI)

I have no concerns about artificial intelligence (AI)



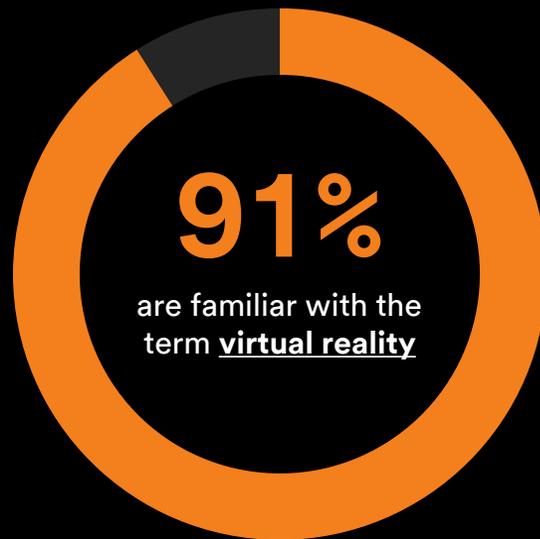
AR & VR **(Augmented Reality** **& Virtual Reality)**

Nearly all are familiar with VR and feel that it plays a significant role in their everyday lives. Most agree 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)



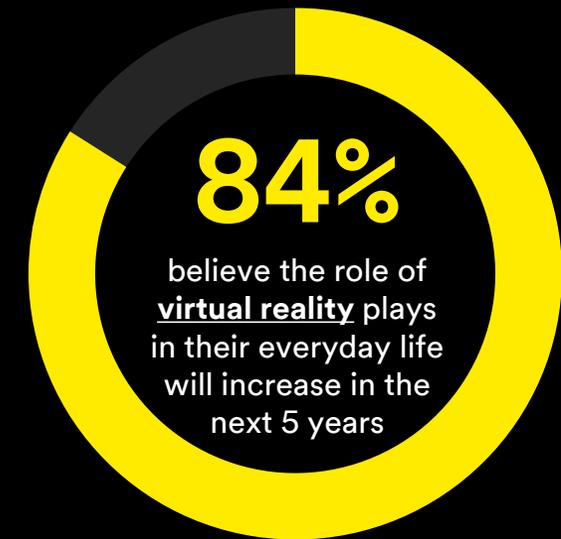
Current Role:

(Very + Somewhat Significant)



Future Role:

(Increase in the next 5 years)

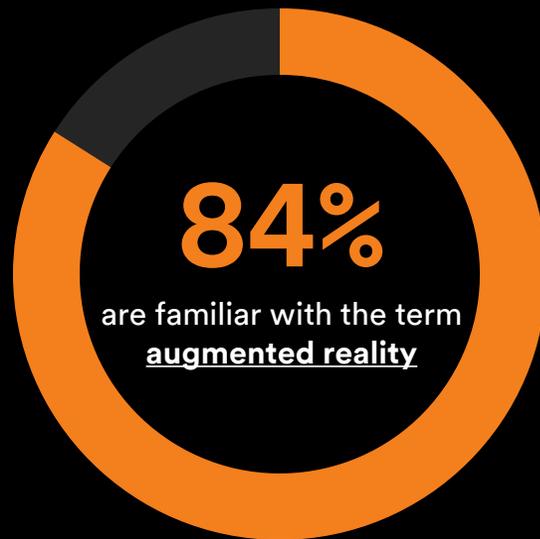


Most are familiar with AR and feel that it plays a significant role in their everyday lives. A majority agree the role of AR in their everyday lives will increase in the next 5 years.

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?

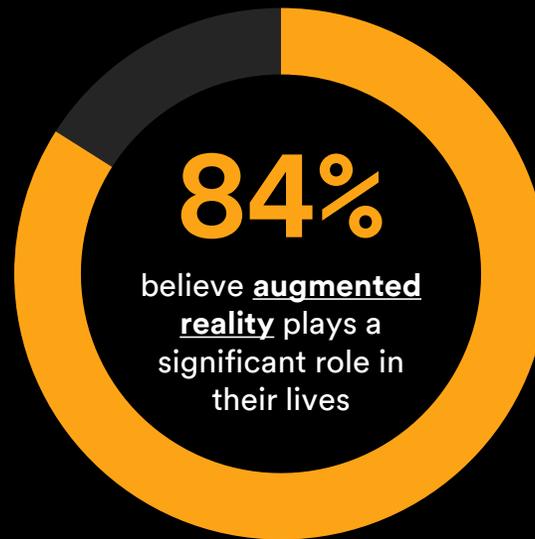
Familiarity:

(Very + Somewhat Familiar)



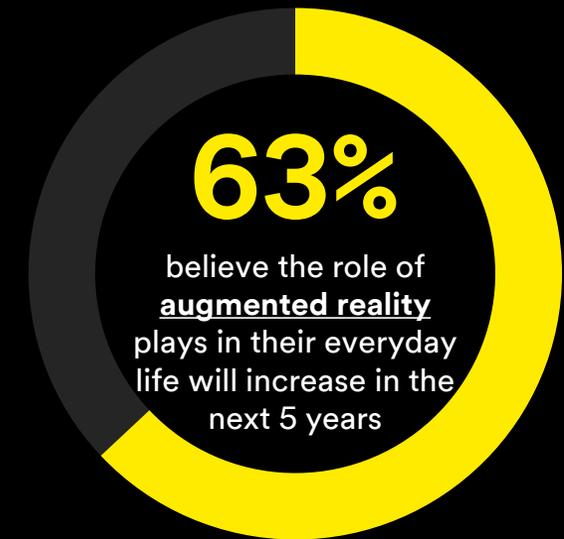
Current Role:

(Very + Somewhat Significant)



Future Role:

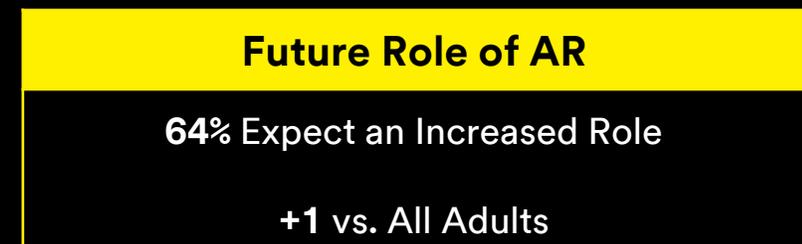
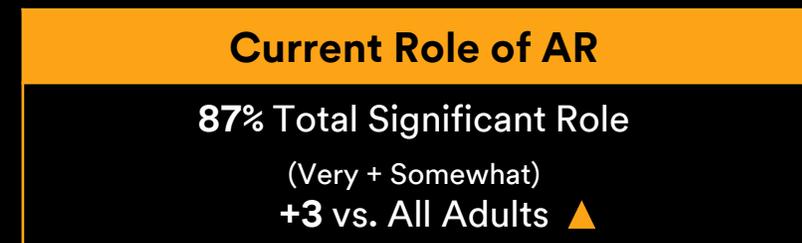
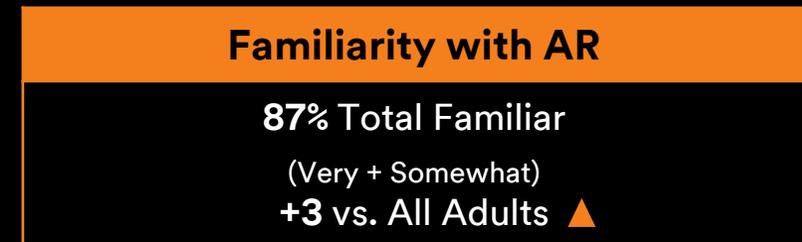
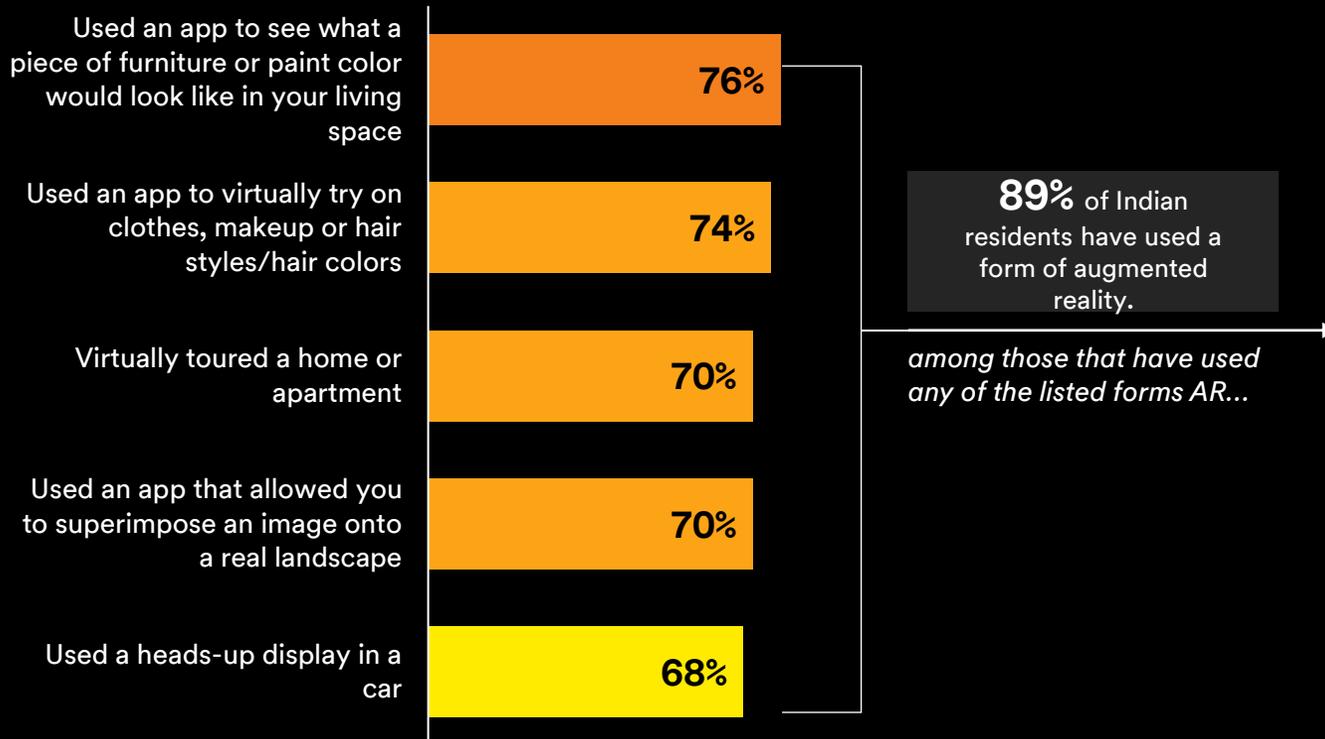
(Increase in the next 5 years)



Indian residents 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:



▲ Indicates positive movement outside of the MOE

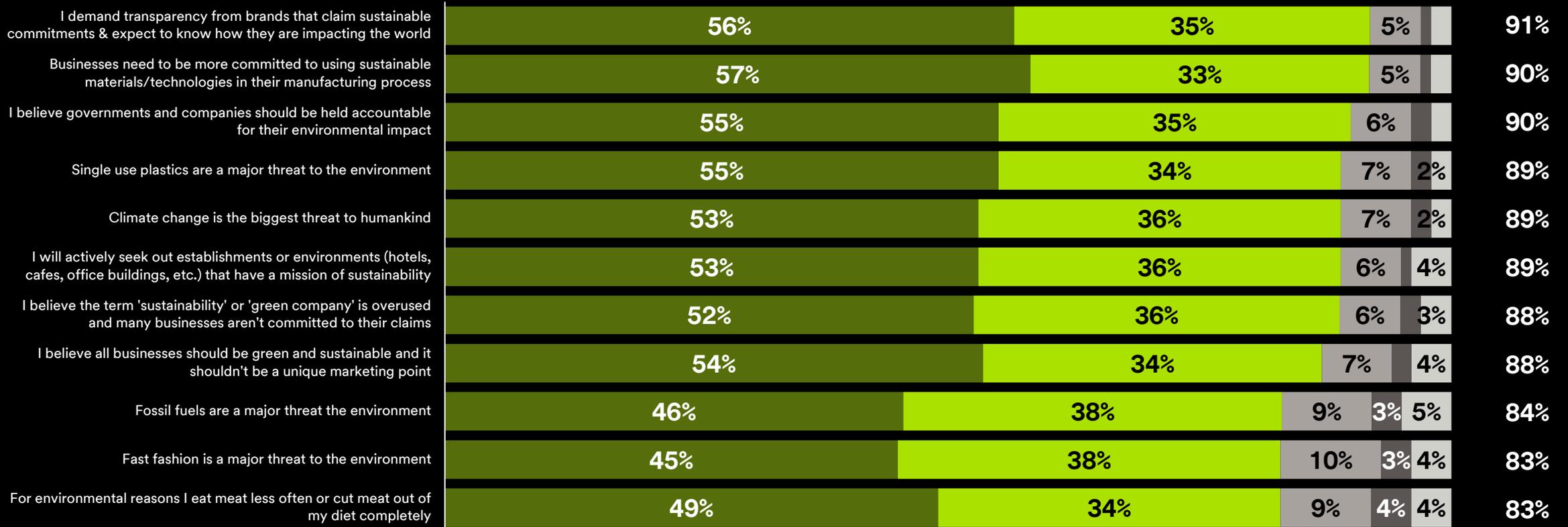
The image features a black background with several overlapping, stylized green leaves on the left side. The leaves are rendered in a dark green color with a slight gradient and are arranged in a fan-like pattern. The word "Sustainability" is written in a bold, white, sans-serif font across the middle of the image, partially overlapping the leaves.

Sustainability

Nearly all Indian adults agree that governments and companies should be held accountable for transparency, their environmental impact, and sustainable production.

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)



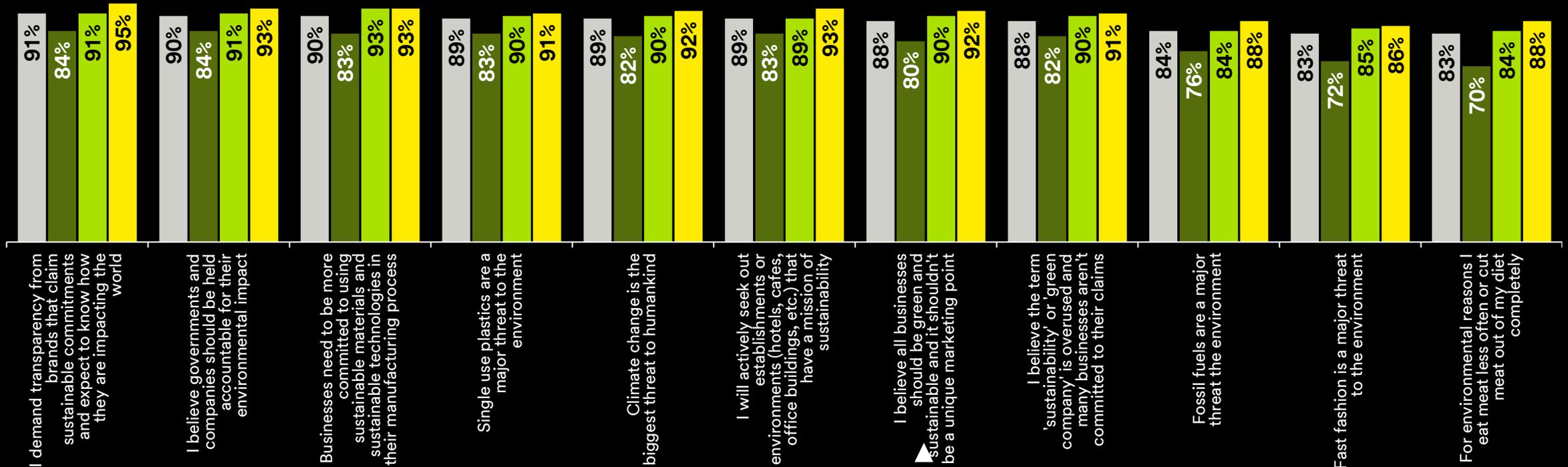
Indian residents over the age of 25 are more likely to agree with each pro-environmental statement than those ages 18–24.

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

Total Agreement

(Strongly + Somewhat Agree)

■ Global Average ■ Age: 18-24 ■ Age: 25-40 ■ Age: 41-65

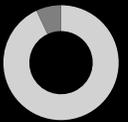




New Paradigm

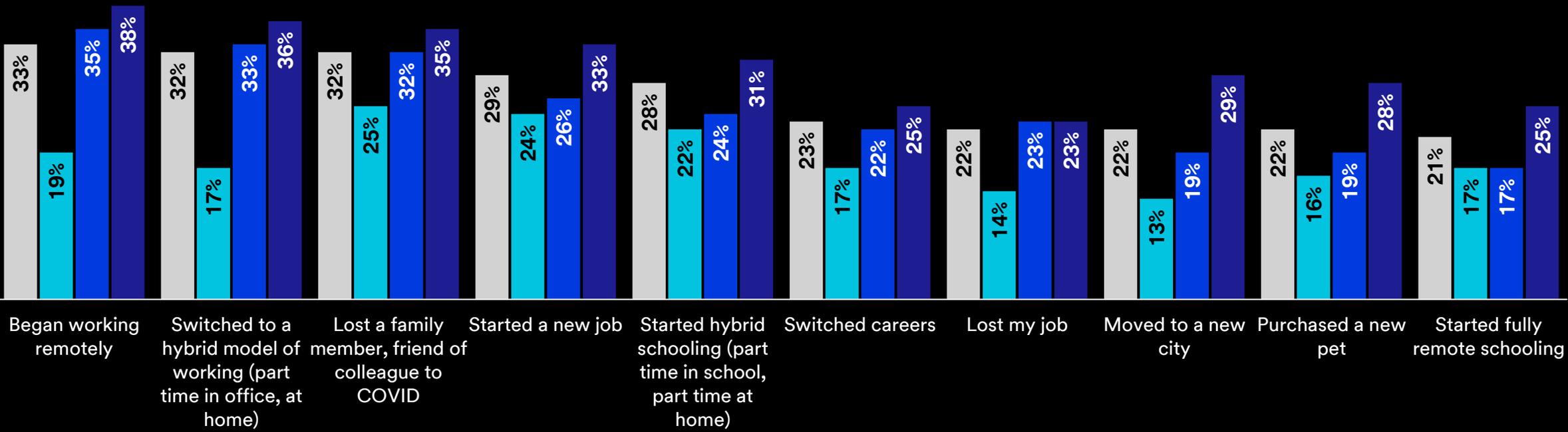
Almost all have experienced a significant life change as a result of the pandemic. A third of all Indian residents have lost a family member, friend, or colleague to COVID.

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



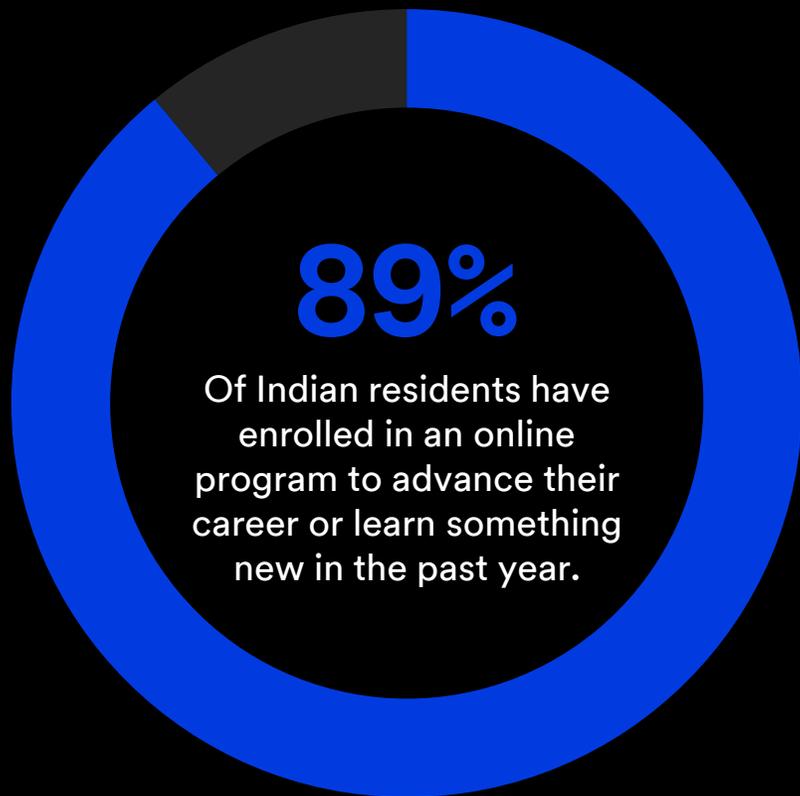
93% Of Indian residents have experienced a significant life change as a result of the pandemic

■ Global Average ■ Age: 18-24 ■ Age: 25-40 ■ Age: 41-65



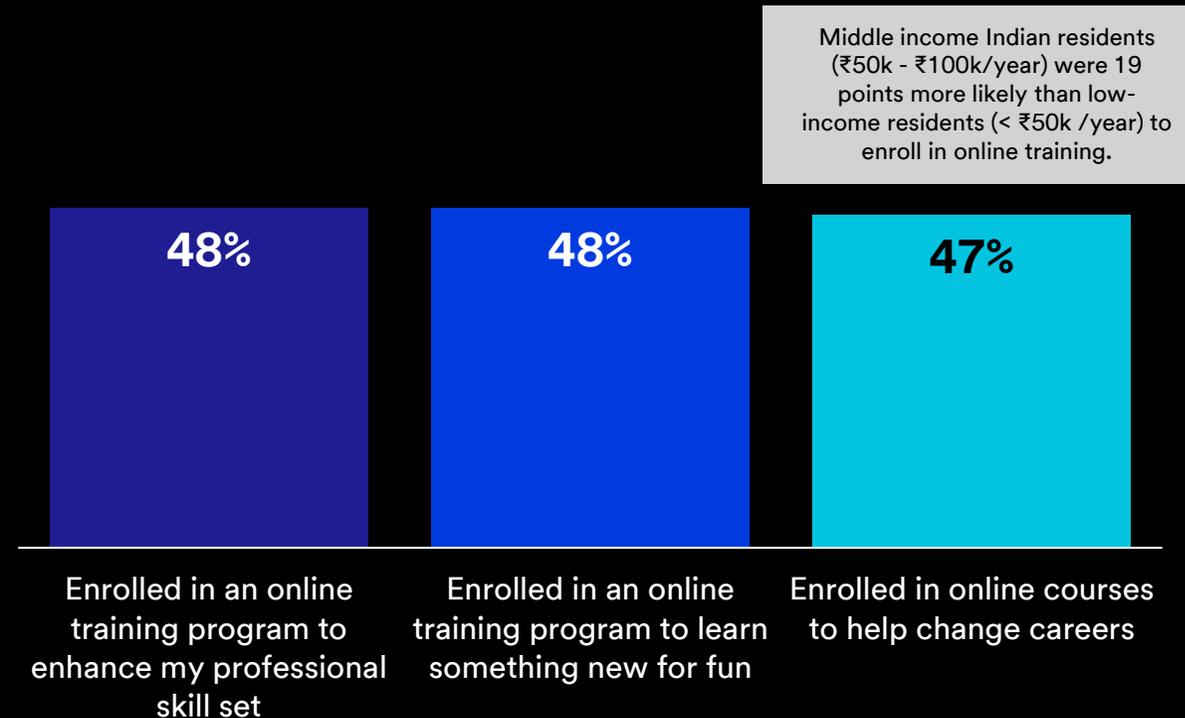
In the past year, most Indian residents have enrolled in an online training program to advance their career or learn something new.

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



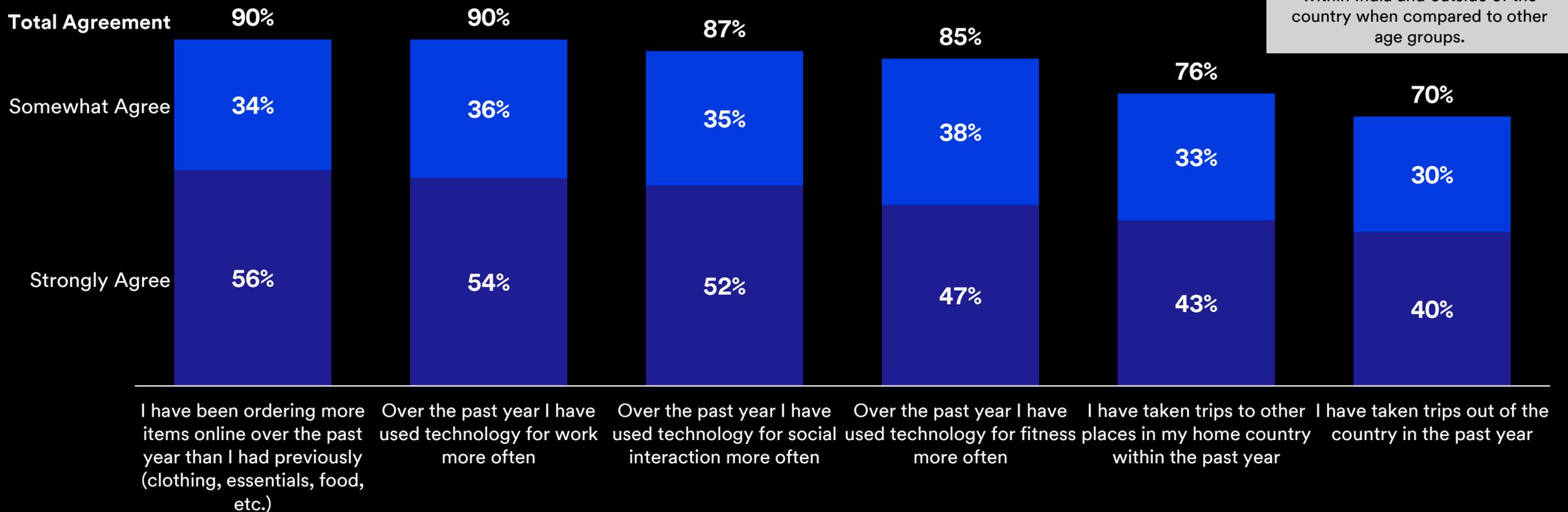
What did they enroll in?

(among all respondents)



Indian residents have been ordering more online and using technology for work and social interaction more often this year than they were previously.

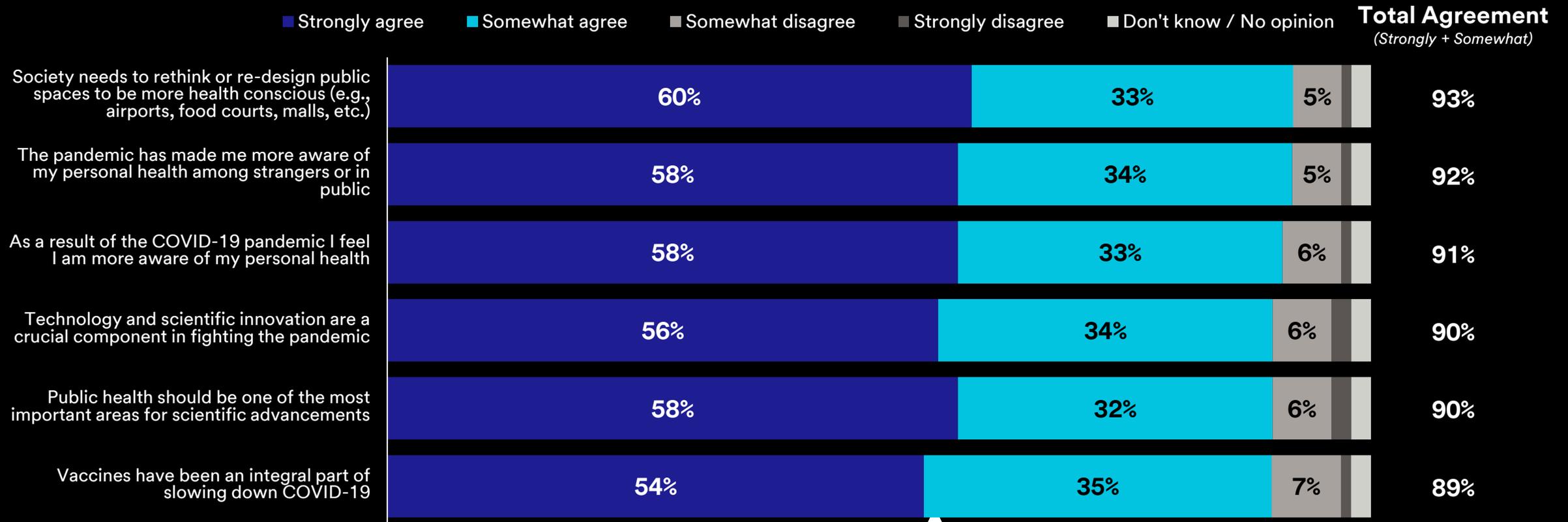
How much do you agree or disagree with each of the following statements?



Those aged 25-40 are more likely to have taken trips both within India and outside of the country when compared to other age groups.

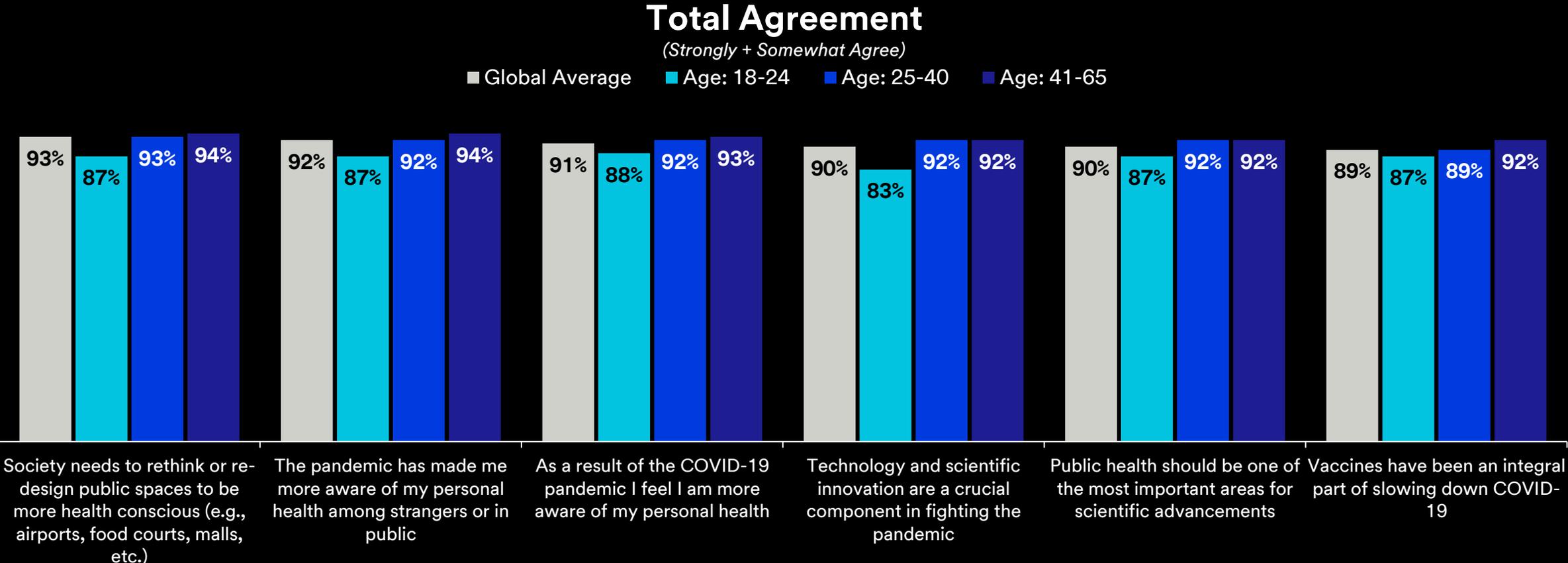
9 out of 10 Indian residents think technology and scientific innovation are a crucial component in fighting the pandemic.

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



Those ages 25-65 are more likely to agree that technology and scientific innovation are a crucial component in fighting the pandemic.

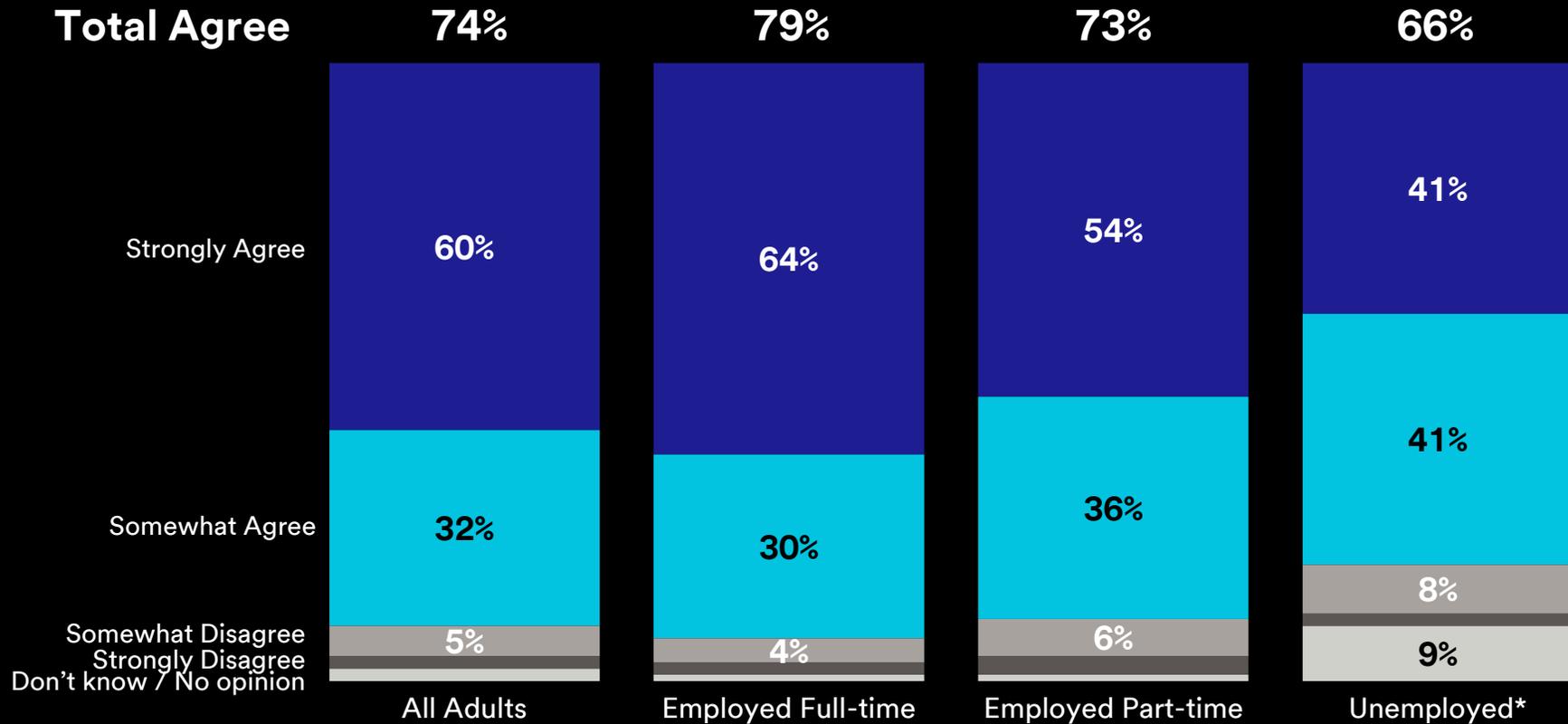
How much do you agree or disagree with each of the following statements?



Most Indian adults agree science and technology during the pandemic has changed the work environment forever, especially those employed full time.

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

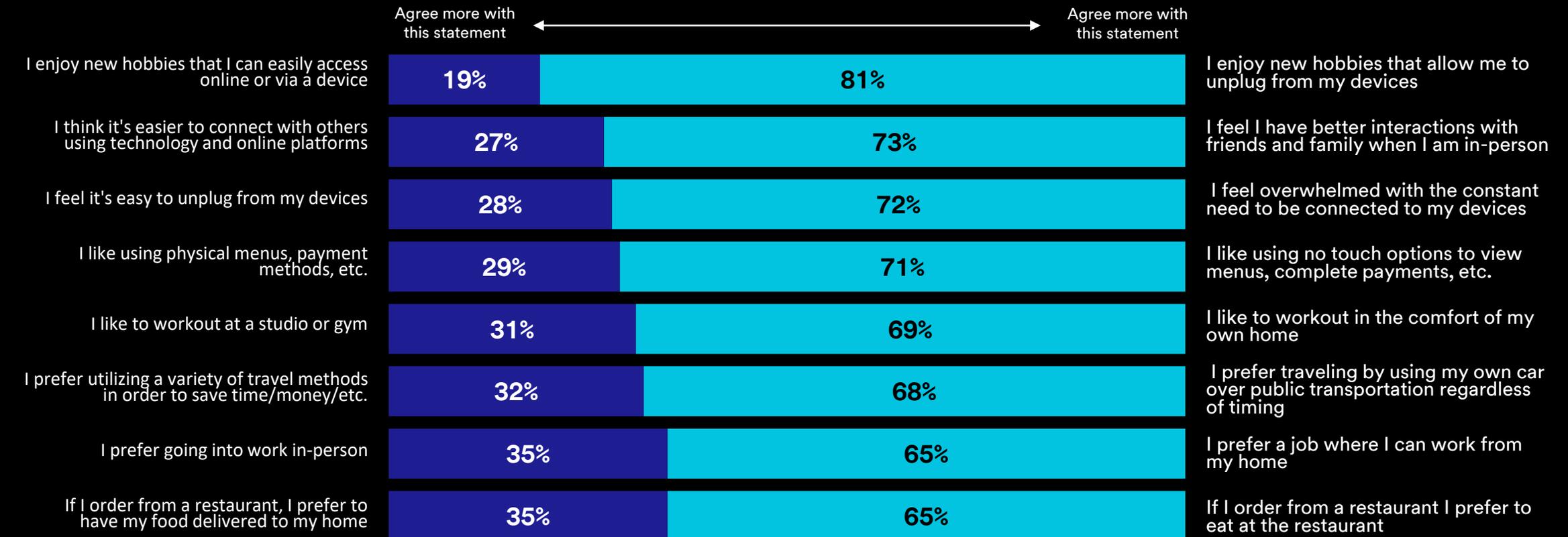
“Science and technology advancements during the pandemic have changed our work environment forever.”



*N = 64 so results are directional
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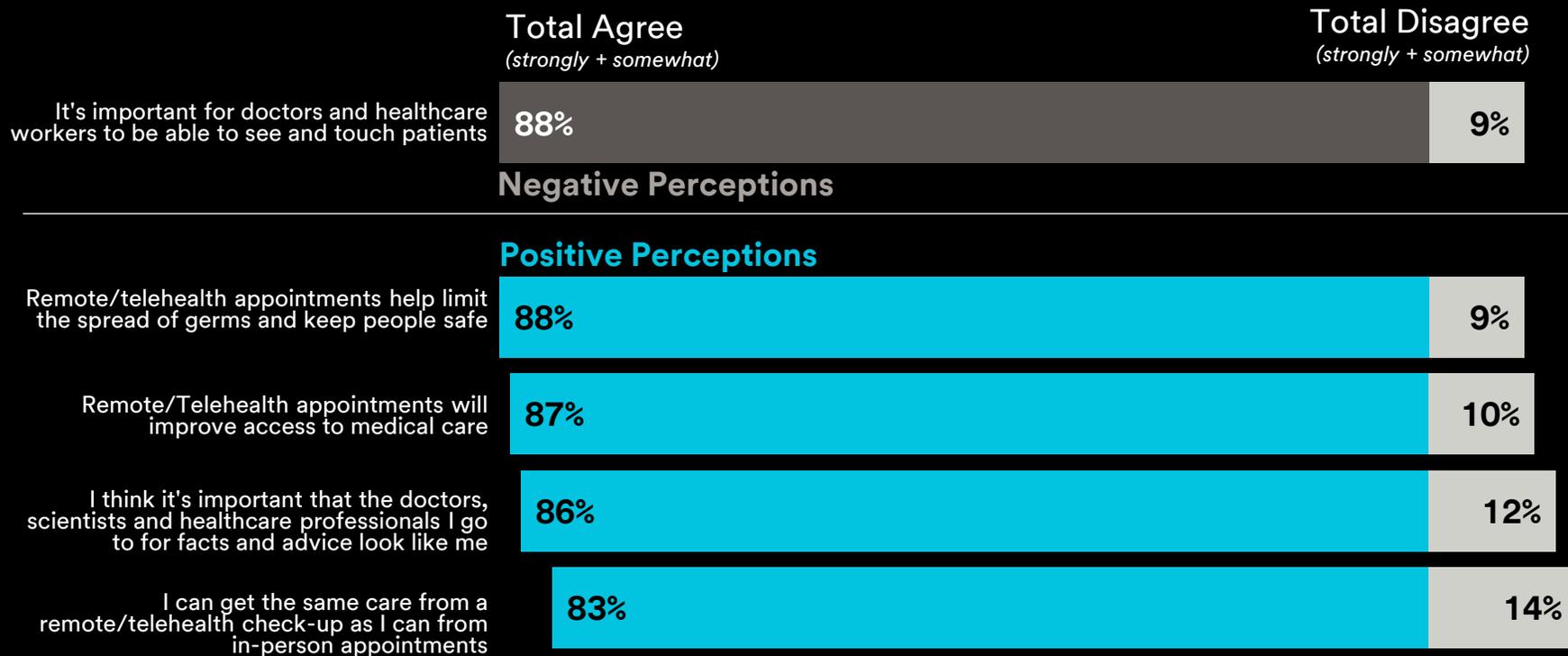
Indian residents prefer in-person hobbies and socialization to virtual or online alternatives. However, most prefer working out and working from home, and no touch menu and payment options to alternatives.

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



Indian residents 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?



among those that have used telemedicine:

93% agreement "Remote/telehealth appointments help limit the spread of germs and keep people safe"
+5 vs. All Adults ▲

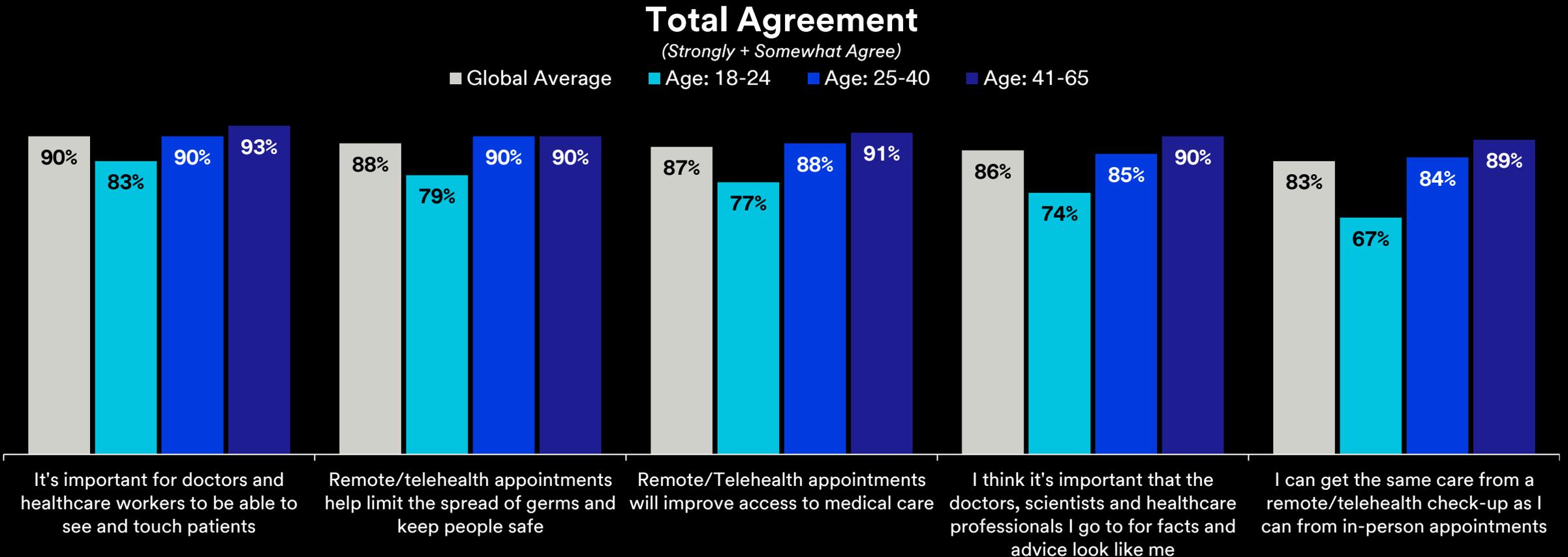
92% agreement "Remote/Telehealth appointments will improve access to medical care"
+5 vs. All Adults ▲

91% agreement "I can get the same care from a remote/telehealth check-up as I can from in-person appointments"
+8 vs. All Adults ▲

▲ Indicates positive movement outside of the MOE

Younger Indian residents (age 18-24) are less likely to believe they get the same care from telehealth.

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





Thank you