Schwartz Reisman Institute for Technology and Society

Global Public Opinion on Artificial Intelligence (GPO-AI)

A report presented by the Policy, Elections, and Representation Lab (PEARL) at the Munk School of Global Affairs & Public Policy in partnership with the Schwartz Reisman Institute for Technology and Society (SRI) at the University of Toronto.

UNIVERSITY OF TORONTO

SCHWARTZ REISMAN INSTITUTE FOR TECHNOLOGY AND SOCIETY

PEARL
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Executive summary

The recent revolutionary advances in the capabilities of artificial intelligence (AI), including the release of powerful generative models such as ChatGPT, MidJourney and Sora, have familiarized the general public with AI: what it is, what it can do and the ways it may fundamentally alter how we live and work. Artificial intelligence is now at the centre of public conversation and debate about technology and society.

In this emerging landscape, mapping public perceptions of AI is more important than ever. Whether and how technology companies are able to deploy AI technologies will rest, at least partially, on whether governments provide the regulatory frameworks necessary to guide the use of these technologies in society.

Public opinion will shape these decisions; if the public does not support AI, governments may attempt to curtail its deployment. Yet public opinion on AI remains divided. To some, these advances set the stage for the next era of humanity: futuristic solutions for the climate crisis, streamlined emergency-room care and workplace efficiency improvements. To others, enhanced AI capabilities herald imminent dangers that range from increased levels of academic misconduct to human extinction.

This report presents the findings of a global representative survey on public perceptions of AI. It is the foundation of a forward-thinking project and will develop reliable indices to capture shifting long-term global insights about attitudes to AI in years to come.

About the Survey

In October and November 2023, researchers at the Schwartz Reisman Institute for Technology and Society and the Policy, Elections and Representation Lab at the Munk School of Global Affairs and Public Policy at the University of Toronto completed a survey on public perceptions of and attitudes toward AI. The survey was administered to over 1,000 people in each of 21 countries, for a total of 23,882 surveys conducted in 12 languages. The combined populations of the countries sampled represent a majority of the world's population.

For detailed information on the survey, see "Methodology" below.

Key findings

1. People are divided about who should regulate AI.

There is little consensus about who should regulate AI. Technology companies are trusted to regulate AI in general: they are the preferred actor for regulating AI and detecting and countering deepfakes. However, only 1 in 5 people believes that technology companies can be trusted to self-regulate. Trust in the government to regulate and use AI is highest in the countries where AI-optimism is greatest.

2. Most people feel they understand what AI is.

Globally, most people feel they understand what AI is (73%), but only about half (53%) feel they understand the concept of an algorithm. Knowledge of specific types of AI varies among applications. For example, 63% of global respondents have heard of ChatGPT, whereas only 30% have heard of deepfakes.

3. There are significant geographic variations in attitudes toward AI.

Public opinion about AI varies dramatically across regions. In general, European and Anglophone countries have lower levels of optimism about AI, have less trust that it will be a benefit and are less likely to use it. Australia, Canada, the United Kingdom and the United States consistently rank at the bottom of AI usage and trust, while China, Indonesia, India and Kenya consistently rank at the top.

4. Most people believe their jobs will be replaced by a machine in the next ten years.

More than half of global respondents think they will definitely or probably be replaced at work by a machine or computer in the coming decade. Even in countries where the majority of people don't think they will lose their jobs, a significant portion (at least a third) still believe it is likely. The jobs of the next generation—respondents' children—are perceived as being even more at risk; almost two-thirds of people think they might be replaced by technology.

5. People are willing to try using AI for a wide range of tasks, but are less trusting that it will be effective.

Overall, respondents are relatively open to using AI to assist with various tasks, but their level of trust in the AI performing the task effectively tends to be lower than their level of openness. Further, willingness and trust are lower for applications linked with personal identity, expression or emotions. For example, respondents are unsure whether they will use AI to select their clothes or potential romantic partners, but are more amenable to AI helping plan their vacations or choose their groceries.

I think [AI is] accurate in terms of numbers, but I don't think it's necessarily accurate when it comes to things that involve people's emotions and thoughts.

— Respondent (Japan)

[数字的な面では正確だと思うが、人の感情や思考が関係する事においては必ずしも正確とは言えないと思う]

Methodology

In October and November 2023, the Schwartz Reisman Institute for Technology and Society, supported by the Policy, Elections and Representation Lab at the Munk School of Global Affairs and Public Policy at the University of Toronto, conducted a census-targeted survey of over 1,000 people in each of 21 countries, in 12 different languages.

Respondents per country: Argentina (1,379), Australia (1,108), Brazil (1,121), Canada (1,107), Chile (1,146), China (1,120), France (1,104), Germany (1,128), India (1,124), Indonesia (1,102), Italy (1,103), Japan (1,102), Kenya (1,172), Mexico (1,101), Pakistan (1,102), Poland (1,103), Portugal (1,107), South Africa (1,124), Spain (1,158), United Kingdom (1,135), United States of America (1,104).

Languages: Chinese (Simplified), English, French, German, Indonesian, Italian, Japanese, Polish, Portuguese (Portugal), Portuguese (Brazil), Spanish (Spain), Spanish (Latin America).

The project received 23,882 responses from 21 countries, the combined populations of which represent more than half of the world's population.

The global average reflects the average result of all the countries where the survey was conducted. It has not been adjusted to the population size of each country and is not intended to suggest a total result.

The survey explored general knowledge of and attitudes toward AI. Topics included concerns about AI, safety, regulation, autonomous vehicles and AI's effect on jobs now and in the future. Participants were asked whether they are interested in or trust applications of AI for clothes, travel, grocery shopping, dating or finance. They were asked about their attitudes toward the use of emerging technologies in education, the justice system, health care and immigration. They were also asked about their knowledge of and experience with ChatGPT and deepfakes.

COUNTRIES SURVEYED BY REGION

I. General Attitudes Toward AI

Artificial intelligence is currently at the centre of dialogues about the relationship among technology, individuals and society. Over the past year, generative models like ChatGPT, MidJourney and Sora have surged in popularity, becoming well-known for their ability to produce text, images and videos that mimic human creativity. The rapid adoption and growing interest in these models reflect their potential to revolutionise content creation, offering tools that enhance productivity, creativity and the exploration of new forms of digital artistry.

The launch of these systems and awareness of AI more generally has spawned multiple and complex discussions of AI's regulatory, ethical and societal implications on global platforms, including UNESCO and the World Economic Forum. Regulation has been top-of-mind in Europe, North America, Asia and Africa. And, based on the global awareness of AI identified in this survey, most people in the world are aware of AI.

This first section explores general, global attitudes towards AI. The pervasiveness of the discussions about AI is not, however, evidence of consensus about its role in the lives of individuals or for society as a whole. And while approximately half of respondents feel positively toward AI, opinions differ across the globe. North American and European countries including France, the United States of America, Canada and the United Kingdom display the most negative views, while China, India, Indonesia and Kenya display particularly positive feelings toward AI.

While in some countries many people are unsure of AI's impact or think it will make things worse, a majority of the global population thinks it will make the future better.

What do people say about AI?

Our survey asked respondents, in an open-ended question: "When you think of AI, what comes to mind?"

Many answers focus on the more tangible aspects of AI. Common descriptions include words like "computer", "machine", "robot", "software" and "program." "Internet" and "online" are also common, if slightly less so.

Many respondents think of specific companies, individuals or products: ChatGPT, Google, Siri, Alexa, Meta, OpenAI, IBM, Baidu, Huawei, Midjourney and Elon Musk come up often. Of these, ChatGPT is by far the most frequently mentioned. Generic examples of technologies are common as well: cell phones, smart homes, sweeper robots, voice assistants, facial and speech recognition and autonomous vehicles. Although fictional, the Terminator and Skynet are common responses. Respondents also frequently mention autonomous machines and data or the access to and manipulation of large amounts of data.

Many respondents think positively of AI. For some, it is generically positive, bringing to mind words like "excellent", "exciting", "intelligent", "good", "smart" and "extraordinary". For others, it is about moving forward: "future", "progress", "modern", "technological advance", "innovation", "evolution" and "sophisticated." AI is often associated with a positive impact on human life, with ideas like "help", "assistance", "aid", "efficient", "quick", "speed", "convenient", "relief", "facilitate", "simplify", "ease", "improve", "work less", "task automation" and "better world".

Others are more negative. Some express a sense of apocalyptic dread: "danger", "horror", "destruction" and "the end of the world". Others, while less extreme, still feel worry or mistrust; they use words like "scary", "anxiety", "fear", "caution", "horrible", "fake", "lying" and "fraud". Negative opinions vary from a sense that AI may rob people of what makes them human— "dehumanisation", "loss of creativity" and "laziness"—to the belief that AI's potential is overblown or just "hype". The most concrete and common concerns are job loss and unemployment.

What does artificial intelligence change in people's lives? AI has the potential to significantly increase efficiency across a variety of industries. For example, in the healthcare field, medical diagnoses can become more accurate and faster with the help of AI algorithms, enabling more effective treatments and saving lives.

— Respondent (Brazil)

[O que a inteligência artificial muda na vida das pessoas? A IA tem o potencial de aumentar significativamente a eficiência em diversos setores. Por exemplo, no campo da saúde, os diagnósticos médicos podem se tornar mais precisos e rápidos com a ajuda de algoritmos de IA, permitindo tratamentos mais eficazes e salvando vidas.]

Respondents frequently grapple with delineating the relationship between what is AI and what is human. Many define these as opposites: what is AI is not human, although it might do—or try to do—what humans do. More commonly, AI is described as a technology (or a robot, or a computer and so on) that can do or try to do what humans do or have the intelligence of a human.

In comparing humans and AI, some reflect positively on the relationship. They commend the technology for successfully doing what humans do: AI is smarter than humans, can help, replace or outperform humans in their work or convincingly mimic a human. Others find the comparison worrisome: their responses suggest that technology attempts to replicate what humans can do but does so incompletely; it takes human jobs or tries to disguise itself as a human. Yet others are neutral or unsure: AI can do many incredible things, but it might result in horrible things if used improperly.

Specific examples of generative AI come up frequently, like ChatGPT, OpenAI and Midjourney. Many respondents also discuss generic versions of this technology (like "chatbot") or describe applications of generative AI (for example, they mention programs that can create images from words or applications that respond to questions with sophisticated answers). Among these, descriptions of programs similar to ChatGPT (that is, AI that can respond to questions with sophisticated answers) are the most common.

Very few respondents mention specific industries impacted by AI, but of those who do, two sectors dominate: healthcare and art. Responses about healthcare are largely positive (for example, advances in medicine), whereas the arts are an area of concern (for example, the loss of creativity or the theft of art).

In the following pages, we analyze closed-ended questions regarding people's attitudes toward AI.

General views on AI

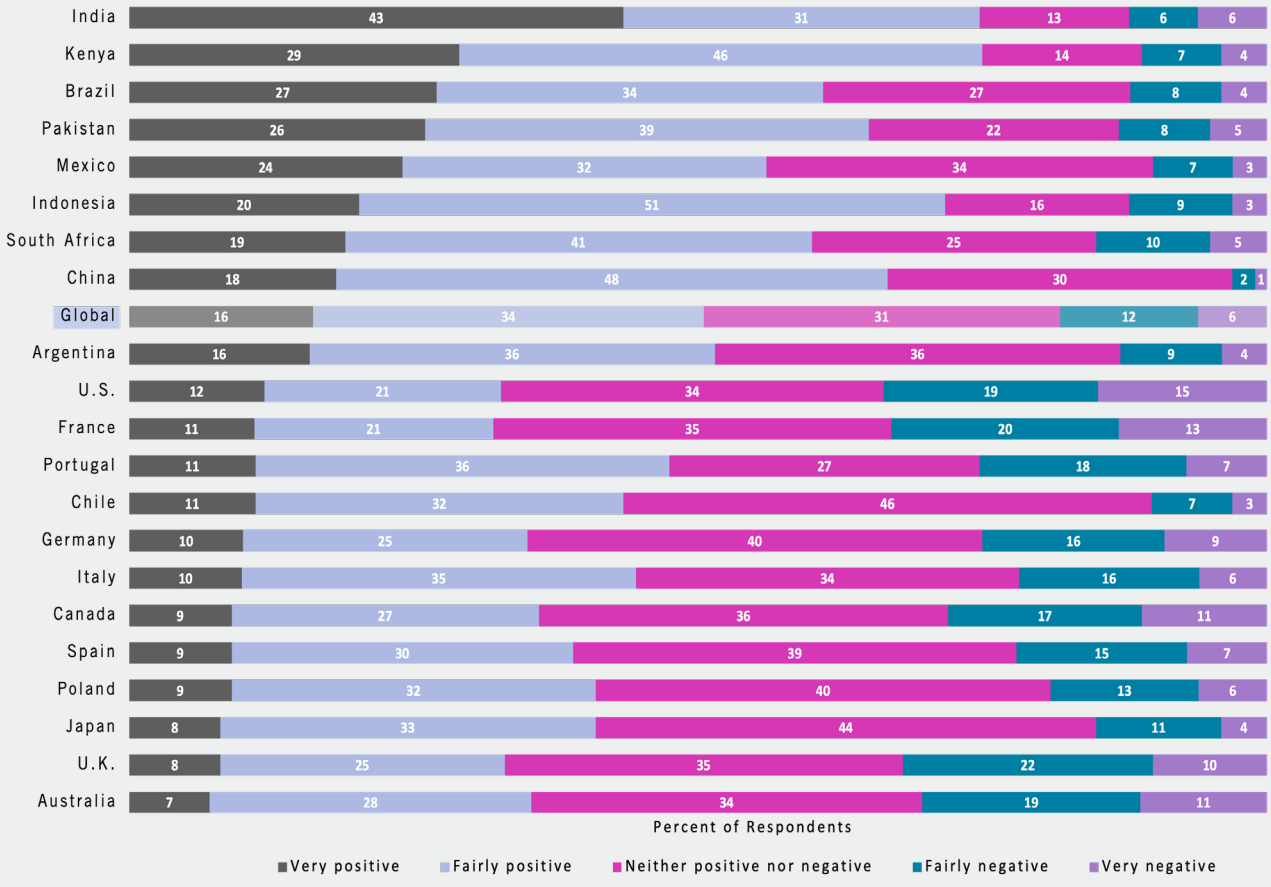
Global attitudes toward AI are somewhat positive. Half of respondents indicate they feel either fairly (34%) or very (16%) positive about AI. Indians are the most likely to feel very positive about AI (43%), but Chinese, Indonesian, Kenyan, Pakistani and South African respondents also have very positive outlooks when combining very and fairly responses.

The most negative feelings are held by Americans, 15% of whom feel very negatively toward AI, and 19% of whom feel fairly negatively. At least one-quarter of those in Australia, Canada, France, Germany, Portugal and the United Kingdom also feel very or fairly negatively about it.

Many respondents are unsure or neutral. About a third of respondents globally (31%) have neither positive nor negative feelings. In some countries (Chile and Japan, for example) almost half of respondents have neither positive nor negative views (46% and 44%, respectively). India and Kenya have the fewest undecided respondents (13% and 14%, respectively), holding highly positive attitudes toward AI.

1.1 General views on AI (%)

Generally speaking, do you have a very positive, fairly positive, neither positive nor negative, fairly negative or very negative view of AI?



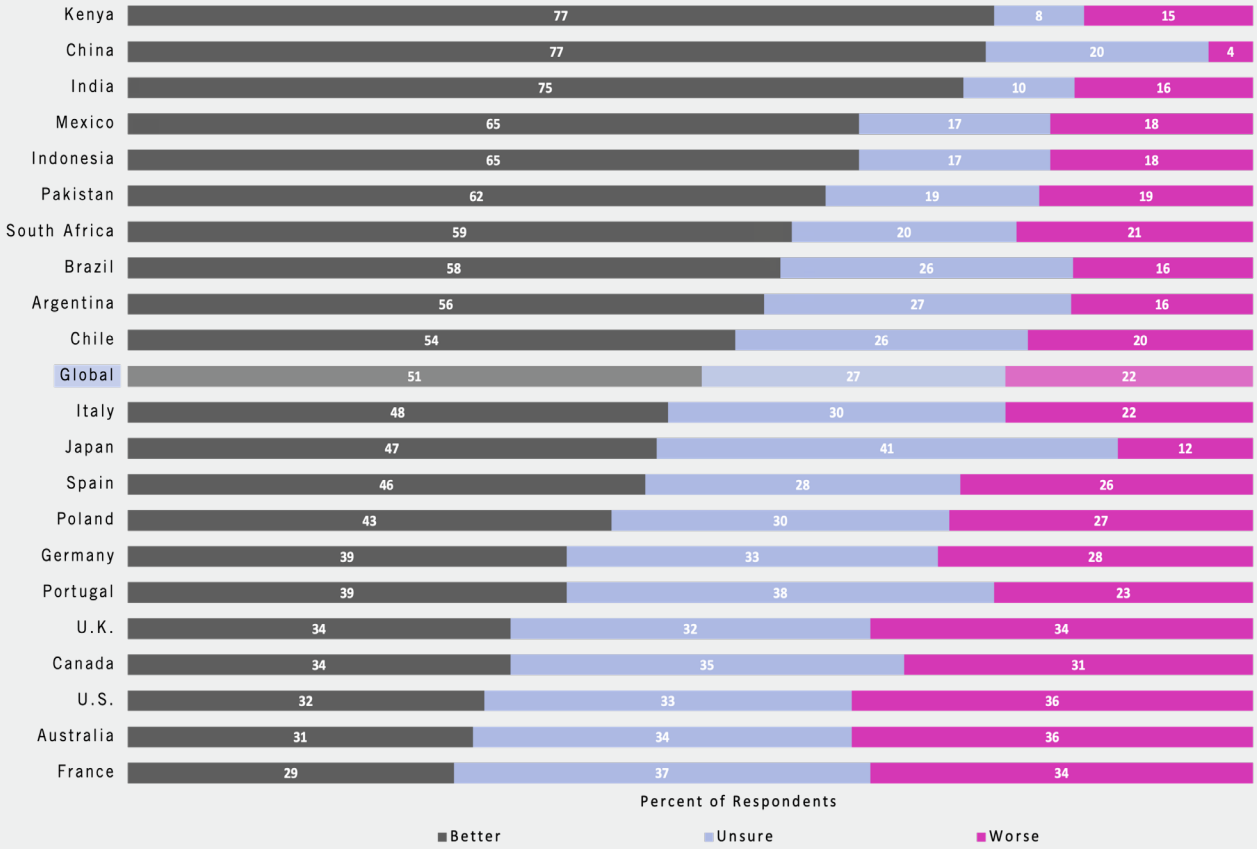
When asked whether they feel AI will make the future better or worse, a slight majority of the global population believes it will make the future better (51%).

There is significant variation among countries. In Kenya, China and India, a clear majority of people think AI will make the future better (77%, 77% and 75%, respectively). Respondents in Indonesia, Mexico, Pakistan, South Africa, Brazil, Argentina and Chile are also all more optimistic than the global mean.

In Australia, France and the United States of America, most people either expect AI to make the world worse (36%, 34% and 36%, respectively) or are unsure. Respondents in Italy, Japan, Spain, Poland, Germany, Portugal, the United Kingdom and Canada are also more pessimistic about the future with AI than the global average.

1.2 Belief that AI will make the future better or worse (%)

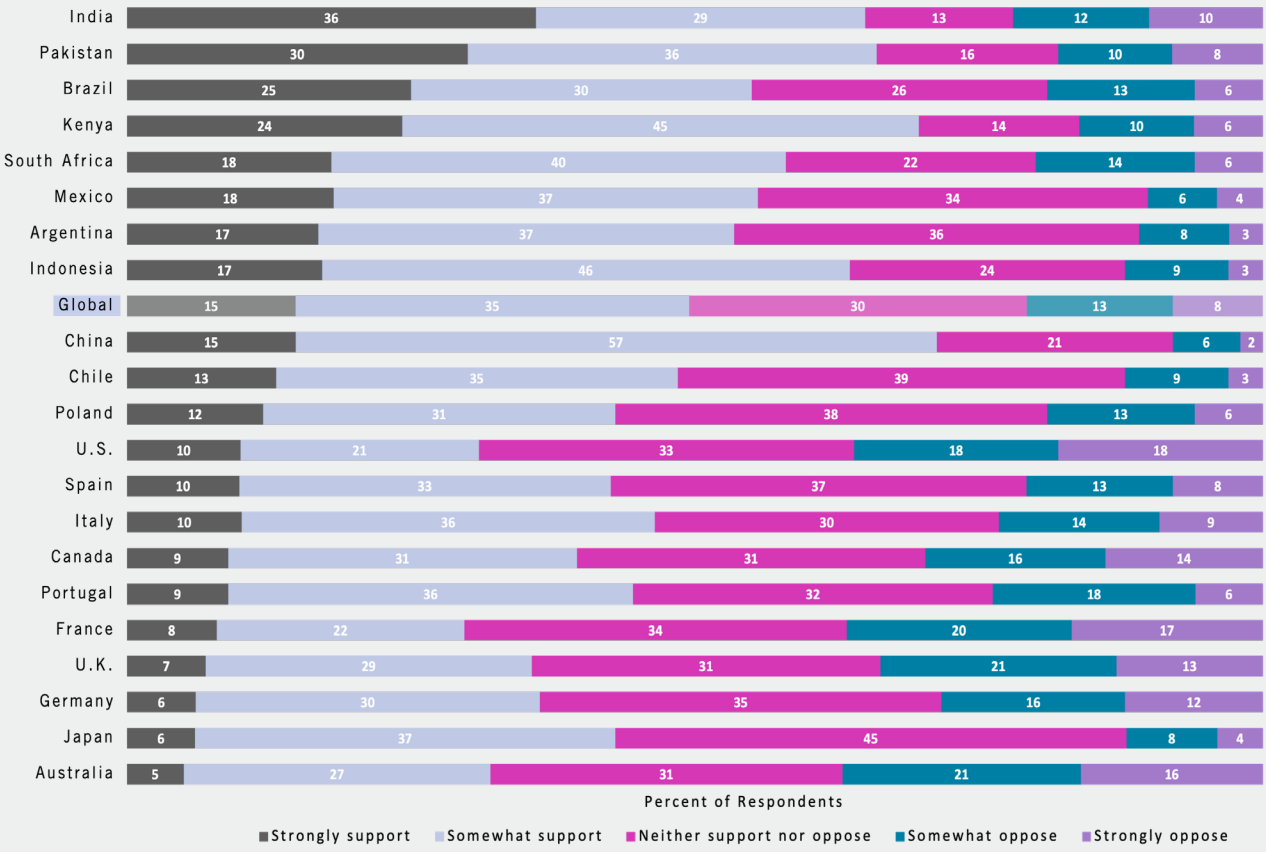
Which statement comes closer to your view: "I think AI will make the future better" or "I think AI will make the future worse."



Globally, one out of two respondents either strongly (15%) or somewhat (35%) supports AI development. A minority is somewhat (13%) or strongly (8%) opposed. India has the strongest support (36%). Among the countries that are at least somewhat supportive of further development are China (72%), Kenya (69%) and Pakistan (66%), followed by India (65%), Indonesia (63%) and South Africa (58%). The most opposed are Australia (37%), France (37%), the United States of America (36%) and the United Kingdom (34%).

1.3 Support for the development of AI (%)

How much do you support or oppose the development of AI?



Impacts of AI

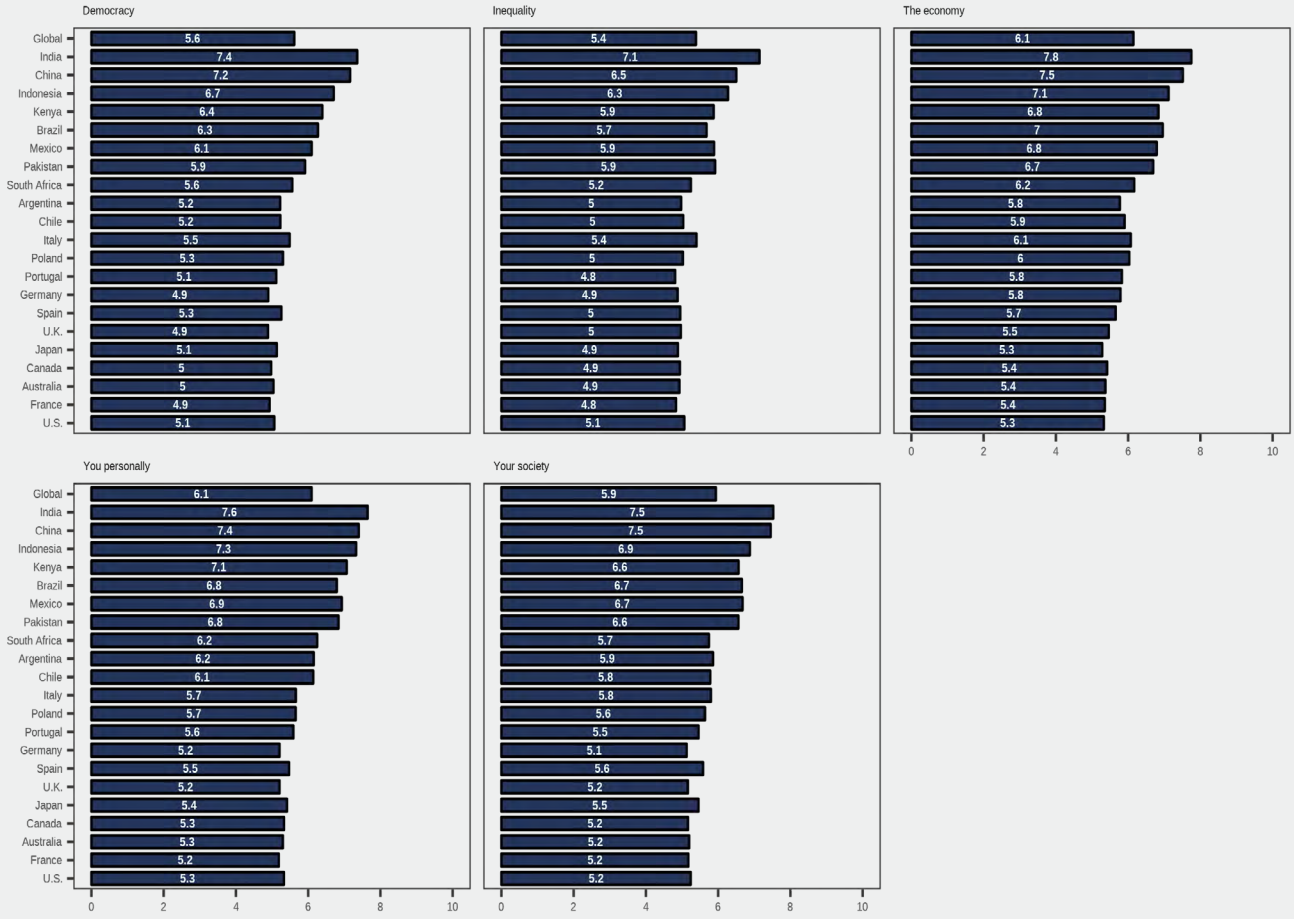
Respondents are generally positive about the impact of AI on their own lives. Globally, respondents hold positive views about the perceived impact on democracy, inequality, the economy and society.

There is, however, some variation among countries. Respondents in India and China feel particularly positive about AI impacts across the board; they rate all impacts above 7 out of 10, with the exception of China's rating on inequality (6.5).

Though most responses across impacts are above 5, there are a few notable exceptions. Portugal, Germany, Japan, Canada, Australia and France rate the current impact on inequality as a 4.8 or 4.9. Similarly, Germany, the United Kingdom and France rate the current impact on democracy as a 4.9.

1.4 Current impact of AI

On a scale from 0 (very negative) to 10 (very positive), in your view, what impact does AI currently have on the following?

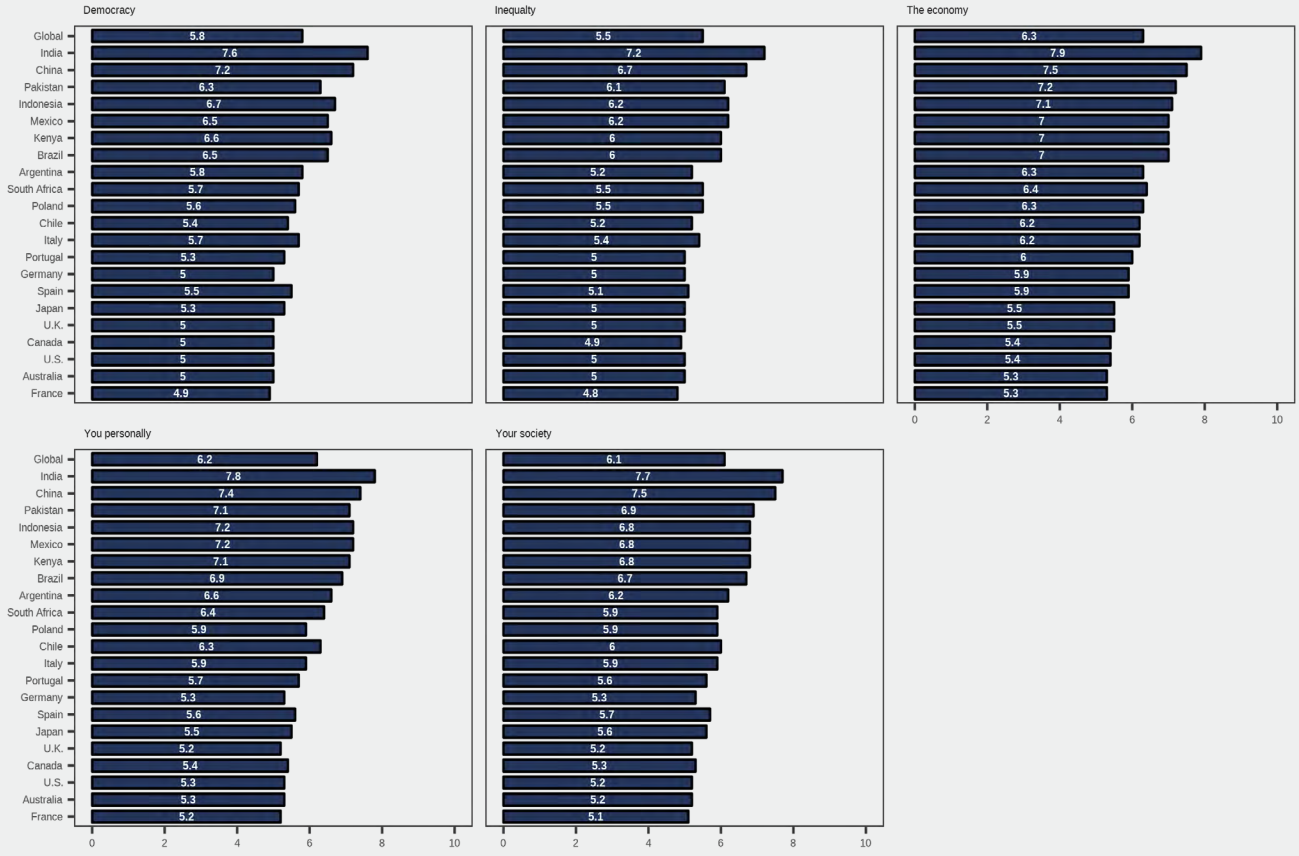


Respondents were also asked to assess the impact of AI in 10 years on the same areas. Again, respondents are generally positive about the impacts of AI. India and China remain the most positive, with all scores above 7 out of 10, except China's rating on inequality. Global respondents are slightly more optimistic about the impact of AI on the economy 10 years from now (6.3) and less optimistic about its impact on inequality (5.5).

France is the least positive about the impacts of AI in 10 years, rating both democracy and inequality below 5. Canada is the only other country with a rating below 5 for any of the listed impacts (4.9, inequality).

1.5 Perceived impact of AI in 10 years

On a scale from 0 (very negative) to 10 (very positive), in your view, what impact will AI have in 10 years on the following?



Respondents were given a list of potential impacts of AI and could indicate their concern for as many as they liked. The results show that respondents do not overwhelmingly share any single concern. Globally, each proposed concern was selected by less than 50% of respondents. Of least concern is their own ability to use AI (22%), the potential for bias and discrimination (24%), uneven access to AI (26%) and the accuracy of results and analysis (28%).

The biggest global concerns are the use or misuse of AI for nefarious purposes and the impact of AI on jobs (both 49%), However, the percentage of concerned respondents varies by country. For example, 31% of respondents in Pakistan are concerned about the misuse of AI compared to 66% of Indonesian respondents.

South Africans are notably concerned about the impact AI will have on jobs: 68% of South Africans are concerned compared to a global mean of 49%.

Some countries display particularly low levels of concern toward particular impacts. For instance, China and Pakistan are less concerned about the potential impact of AI on service dehumanisation: only 22% of Chinese respondents and 21% of Pakistani respondents are concerned,

1.6 Concern about specific impacts of AI (%)

Thinking of the potential impact of AI in the next few years, what are you most concerned about? (Check all that apply.)

	Misuse/ use for nefarious purposes	Impact of AI on jobs	Violation of citizen's privacy	Dehumanization of services	Lack of transparency in decision-making	Impacts of AI on education	Ethical implications	Accuracy of results and analysis	Uneven access to AI	Potential for bias and discrimination	My own ability to use AI
Global	49	49	44	41	34	33	30	28	26	24	22
South Africa	47	68	55	49	47	43	40	38	28	29	29
Indonesia	66	59	46	28	36	35	23	30	29	33	30
Argentina	63	53	53	52	35	32	32	23	35	20	22
Portugal	62	57	57	59	41	37	37	22	32	27	22
Chile	56	58	58	54	35	33	34	24	32	23	24
Spain	58	49	53	54	35	33	34	20	28	24	18
Germany	57	42	44	40	33	27	27	24	23	22	16
Kenya	34	54	34	37	36	47	33	43	22	28	33
Mexico	52	54	43	47	32	30	29	25	30	23	26
Japan	52	36	33	28	24	25	24	29	27	18	16
Canada	52	49	48	48	38	34	37	32	24	30	18
Pakistan	31	51	31	21	28	43	23	34	19	18	31
Poland	51	37	49	27	32	28	25	20	20	16	14
France	44	43	43	51	30	28	22	23	22	17	19
U.K.	48	49	40	44	35	27	35	31	18	32	18
India	34	48	35	28	36	41	32	39	29	29	36
Italy	47	40	40	42	31	24	25	20	19	18	17
Brazil	46	47	46	44	35	33	28	18	35	26	20
Australia	45	45	45	43	42	28	38	38	21	34	18
U.S.	43	43	42	39	32	27	32	30	19	26	19
China	39	39	39	22	27	26	25	24	23	20	18

II. Understanding of AI

Discourse about AI is incredibly pervasive. Most people have some level of awareness about AI technologies. Identifying global trends in terms of people's understanding of AI is essential to the goal of gaining insights into public opinion. After all, what people believe AI is and is not capable of can have drastic impacts on their attitudes towards these technologies. Below, we analyze general self-assessed understanding of a few core concepts, as well as global knowledge about AI capabilities.

Self-assessed knowledge is fairly high. But this awareness does not necessarily translate to an understanding of the capacities or current applications of AI. For example, responses indicate a general understanding that AI is not capable of feeling emotions, although belief that it can do so is highest in countries identified as holding particularly positive attitudes to AI (China, India, Indonesia, Kenya).

Artificial intelligence leverages computers and machines to mimic the problem-solving and decision-making capabilities of the human mind

— Respondent (Pakistan)

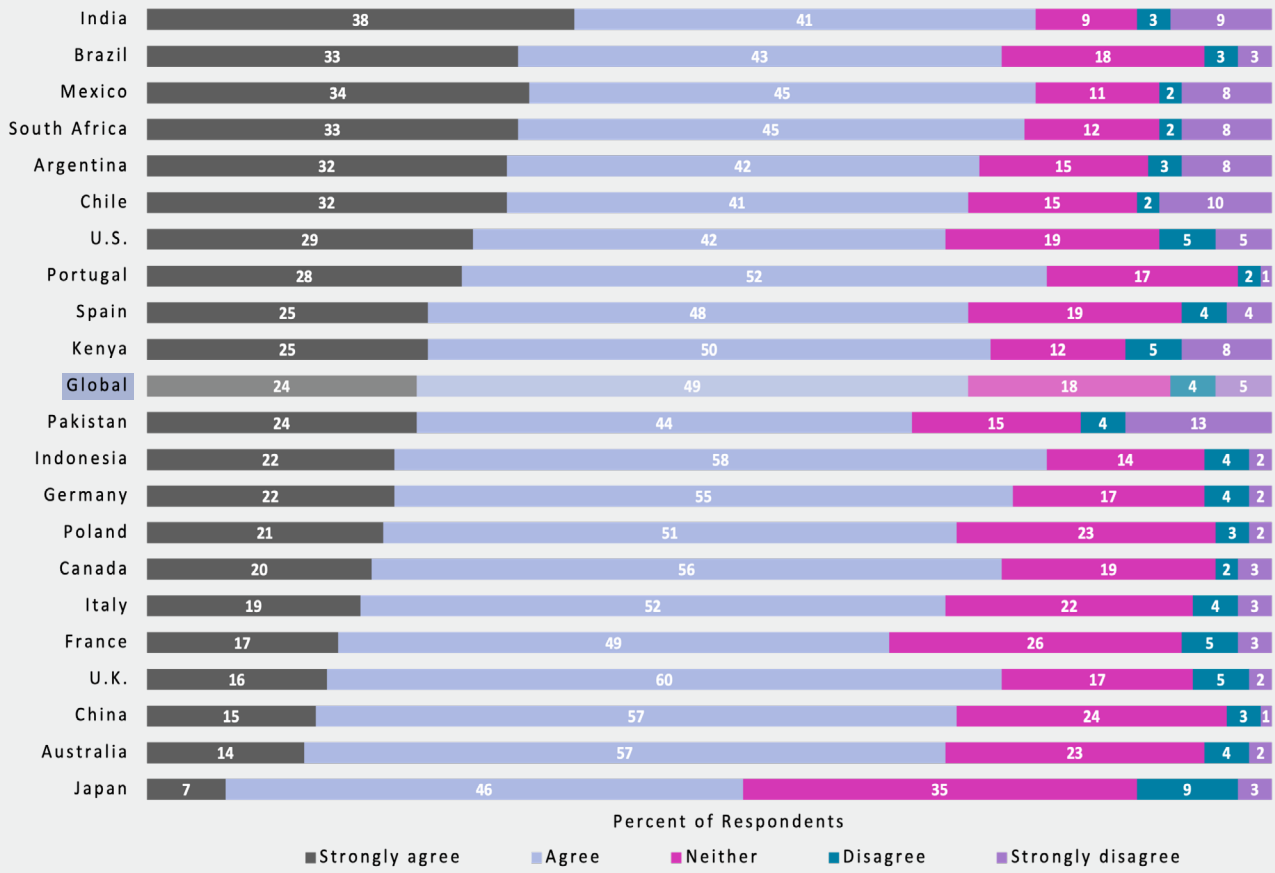
Self-assessed understanding

Almost three-quarters of the global population (73%) feel they understand what the term AI means. Indonesians have the highest self-reported knowledge: 80% either agree or strongly agree that they know what it means.

Respondents in India are the most confident about their understanding, with 38% reporting they strongly agree they understand what AI means. Argentinians, Brazilians, Chileans, Mexicans and South Africans are similarly strongly confident (more than 30%). Although Japan displays the least certainty, 53% of Japanese respondents still agree or strongly agree they know what AI means.

2.1 Comprehension of AI (%)

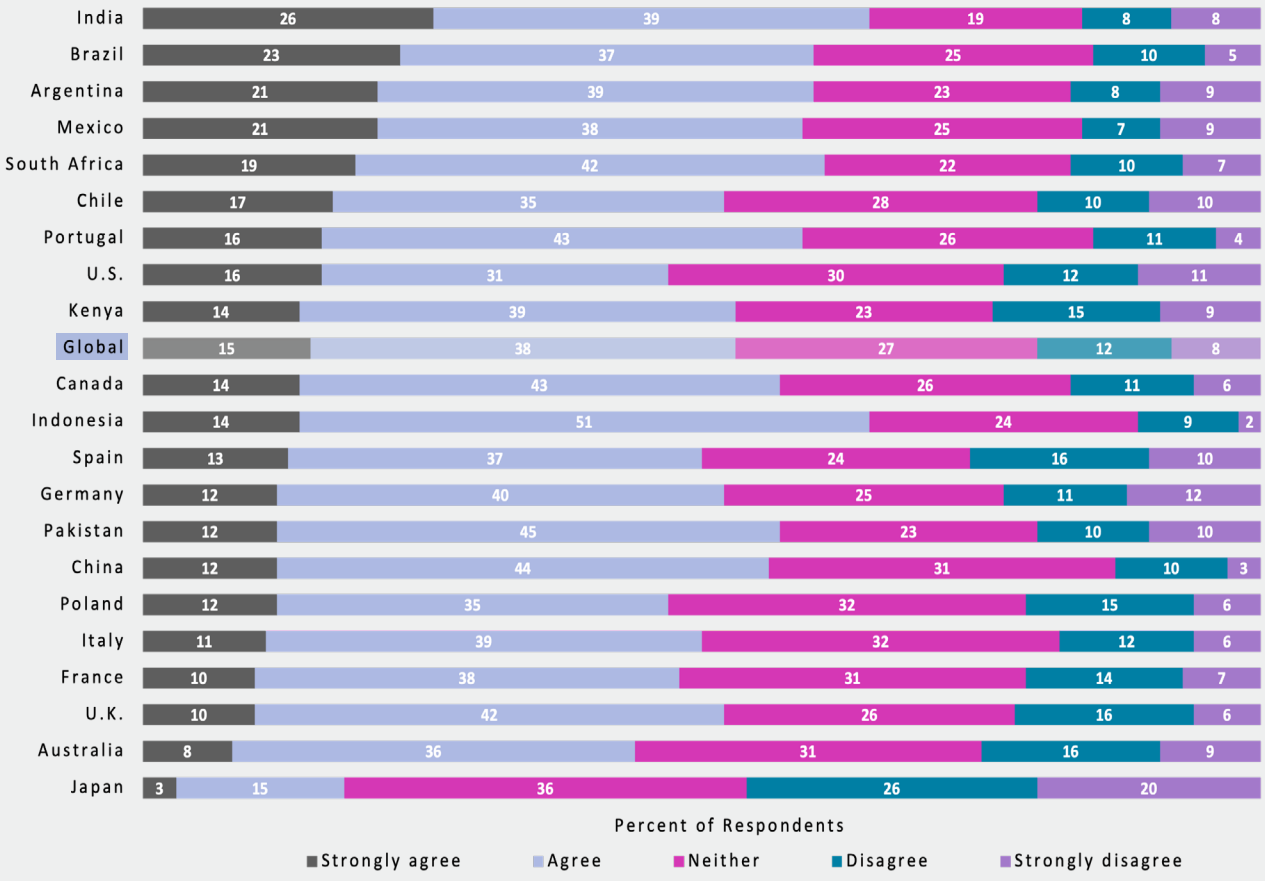
I understand what the term "artificial intelligence" means.



When asked if they know what an algorithm is in the context of computer science, respondents are slightly less confident. Globally, a slim majority (53%) agrees or strongly agrees that they understand the concept. By a significant margin, Japanese respondents are the least sure they understand algorithms (only 18% agree or strongly agree). As with the term AI, India and Indonesia demonstrate high confidence in their knowledge (66% and 65%, respectively, agree or strongly agree). Argentina, Brazil, Canada, China, Mexico, Pakistan, Portugal and South Africa are not far behind, all hovering around 60%.

2.2 Comprehension of algorithms (%)

I know what an algorithm is in the context of computer science.



Knowledge of AI capabilities

Globally, respondents believe AI is currently capable of doing a wide variety of tasks. The greatest agreement is that AI can learn from data to increase understanding (57%) and interpret images (56%) (see Figure 2.3). A majority of respondents also believe AI can help solve business problems, interpret speech and perform video surveillance.

Slightly less than half (48%) of global respondents think AI is capable of playing a game. This is notable since early AI breakthroughs included systematically defeating humans at chess, Go and complex strategy games.

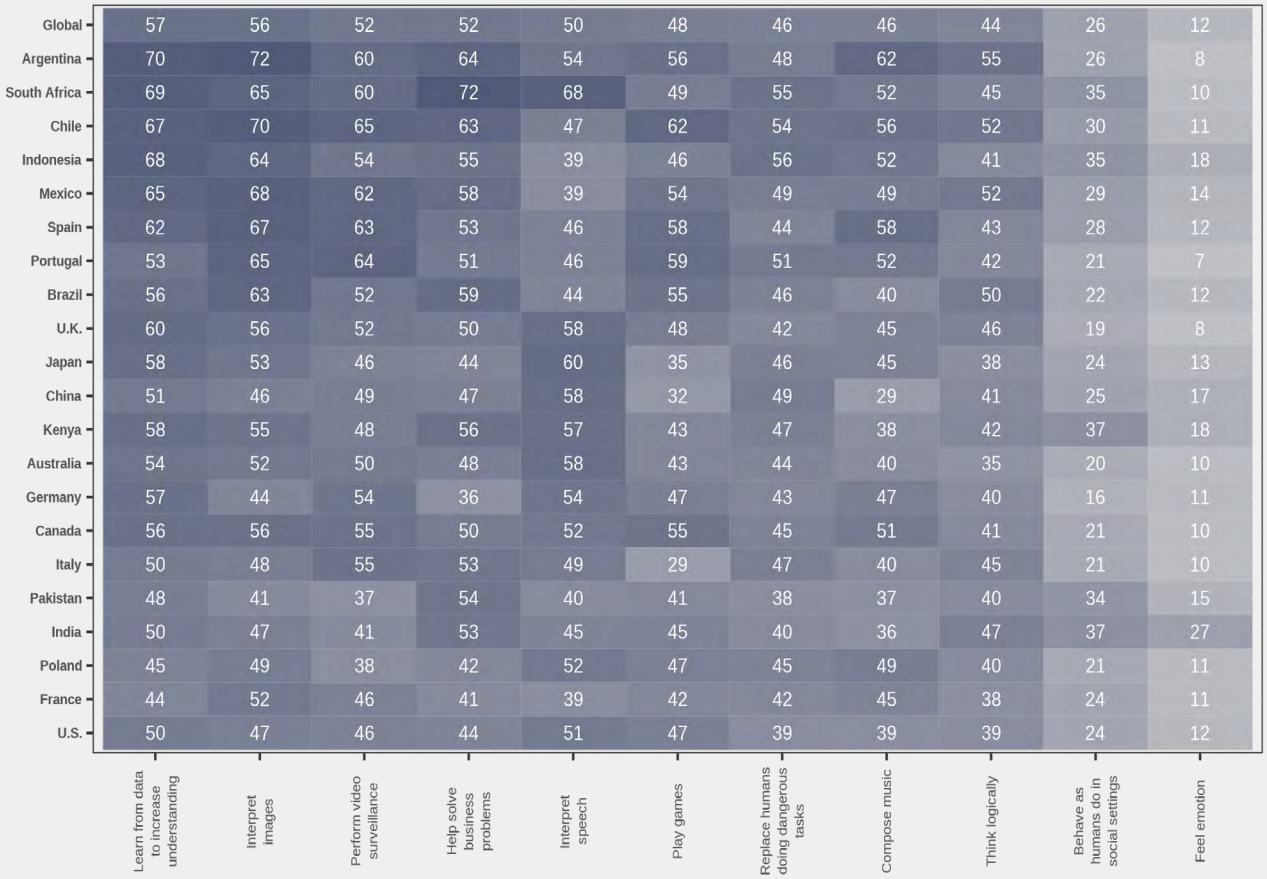
[AI is] a machine's ability to perform the cognitive functions we associate with human minds, such as perceiving, reasoning, learning, interacting with an environment, problem solving, and even exercising creativity.

— Respondent (Kenya)

South Africans, Chileans and Argentinians ascribe the most current capabilities to AI, while people from France, Pakistan and the United States of America are the most sceptical.

Globally, few people (26%) believe AI can behave as humans do in social settings, and only a small minority believe it can feel emotions (12%). These beliefs vary somewhat across countries. India, Indonesia and Kenya are outliers, with the highest number of respondents who believe AI can feel emotions (27%, 18% and 18%, respectively) and large numbers who believe it can act like humans do (37%, 35% and 37%, respectively).

Check all that apply from the following list of 11 proposed "capabilities" that AI is able to perform at this time.



> **[AI] is a theoretical way in which a machine would have an intelligence equal to that of humans; would be self-aware and would have the ability to make decisions.**
>
> **— Respondent (Mexico)**

[Es una forma teórica en la que una máquina tendría una inteligencia igual a la de los humanos; sería autoconsciente y tendría la habilidad de tomar decisiones.]

Respondents were given a list of technologies, all of which use forms of AI, and asked to identify which ones they thought do in fact use it. Most people identify virtual and online virtual assistants (62% and 64%, respectively), but only about a third of people think AI is used in email spam filters (34%).

Overall, respondents are divided on whether AI is used for image search or recognition (56% believe it is), predictive search terms (51%) or recommender systems (45%). This suggest substantial gaps in the public's knowledge of where AI is already widely deployed.

South Africans are the most likely to think AI is used in the proposed technologies and four out of five of them believe it is used in online virtual assistants (81%), the highest of any country for any application.

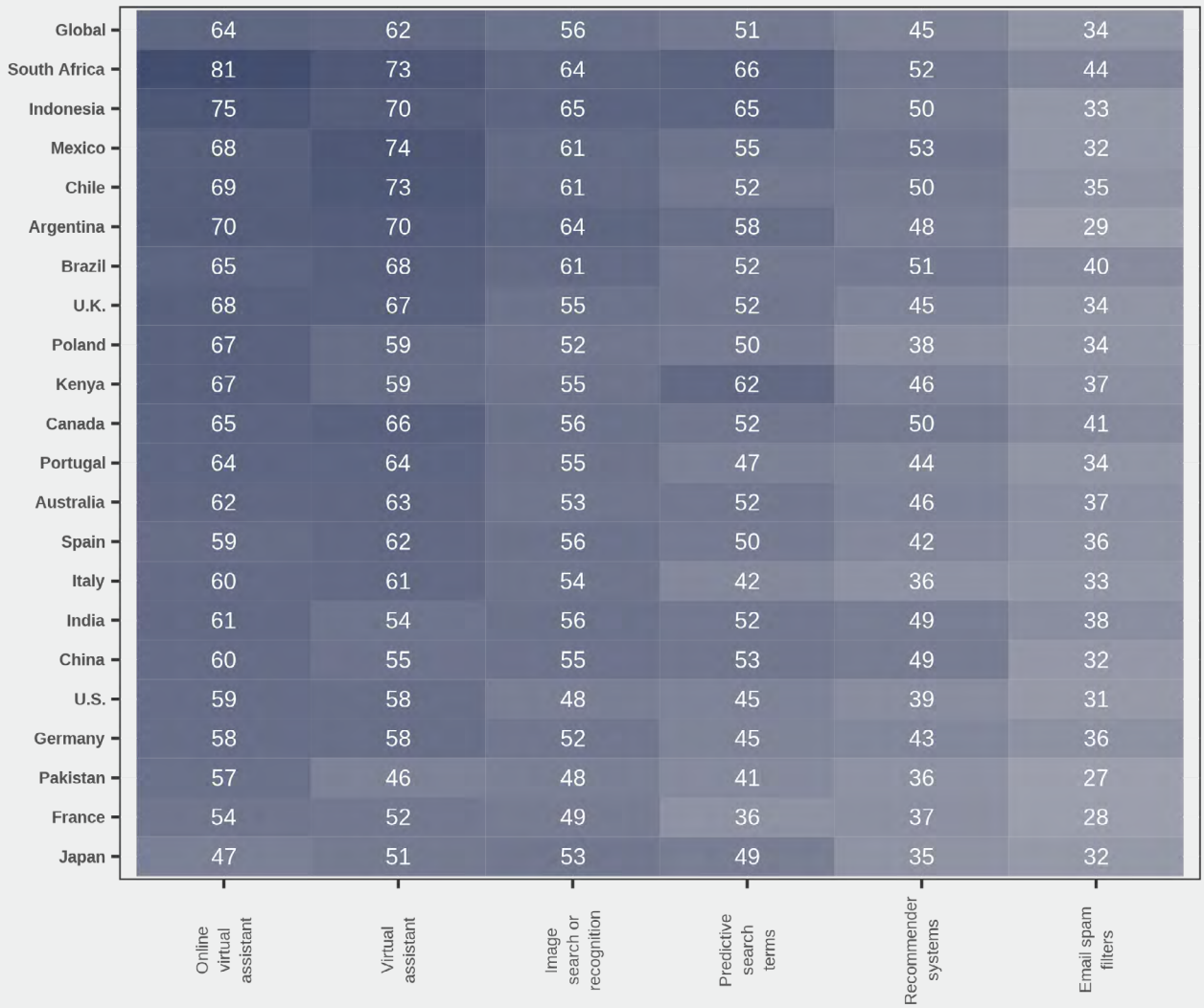
[AI is the] ability of a human to virtually replace human thinking.

— Respondent (Germany)

[Fähigkeit ein Mensch zu ersetzen virtuell menschliches Denken]

2.4 Knowledge of which technologies use AI (%)

Which of the following technologies use AI? (Check all that apply.)



III.

Impact of AI on Labour and Employment

AI is expected to significantly impact the labour market; Goldman Sachs has predicted that up to two-thirds of current American and European jobs are exposed to some degree of AI automation and one-fourth could be substituted by generative AI. It is also expected that workers may need to change skills or upskill in order to adapt to a new labour environment.

On average, approximately half of global respondents perceive themselves and those around them as vulnerable to job loss due to being replaced by a computer or machine. When it comes to the next 10 years, respondents seem to view their own jobs as being slightly more at risk than those of the people around them. However, respondents view their children and future generations as the most vulnerable to job loss due to machines.

There is significant variation amongst countries on this topic. Countries with some of the most positive attitudes toward AI (including India, Indonesia and Pakistan) also perceive job loss due to machines as particularly likely, both for themselves and those around them. The reverse is also true; many countries with the most negative views on AI (including Canada and the United Kingdom) perceive job loss as less likely.

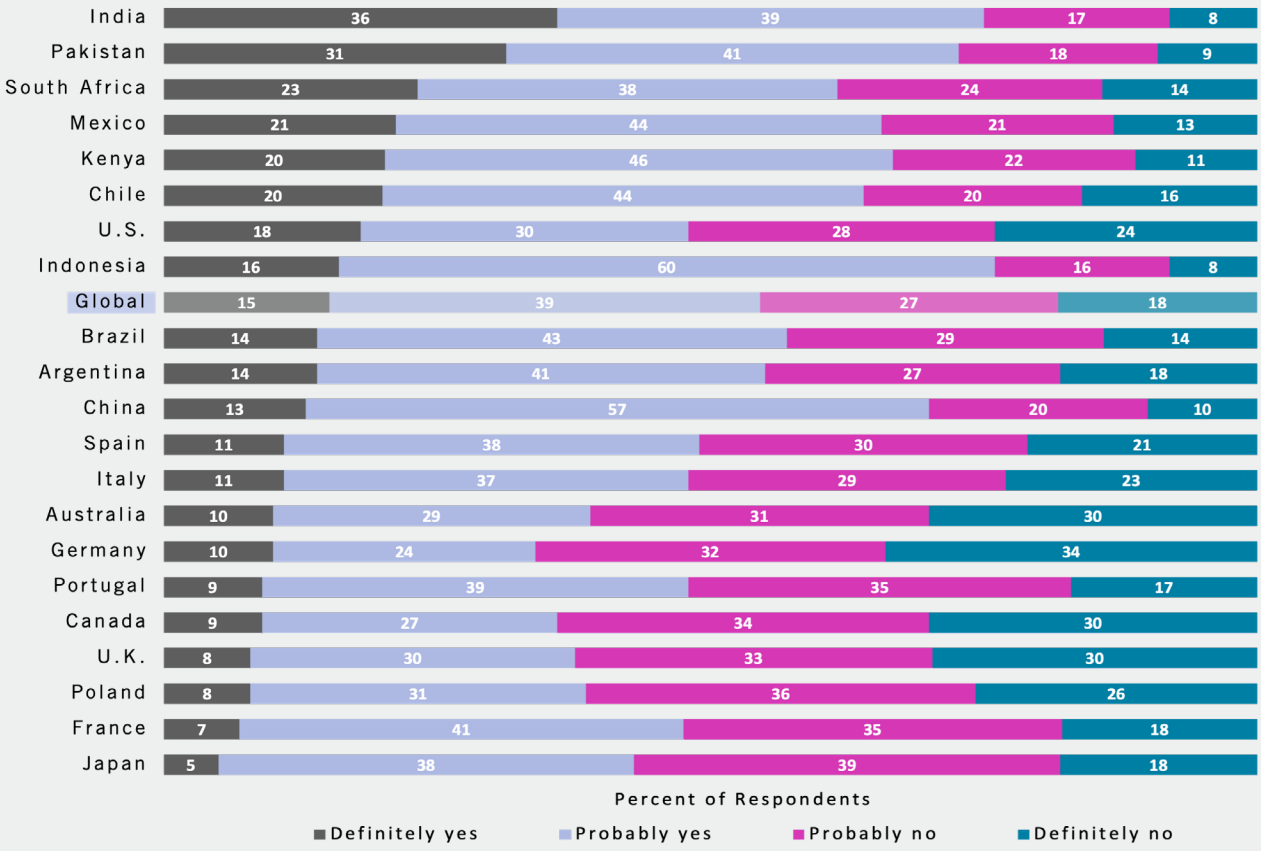
Personal job loss

Globally, most respondents (54%) expect their job to probably or definitely be replaced by a computer or machine in the next 10 years.

Indians are most likely to expect a machine to replace them in their job (75%). While Germans are the most sceptical about AI-induced job losses, one-third (34%) still probably or definitively believe a machine will replace them eventually.

3.1 Perceived vulnerability to personal job loss (%)

Do you think a computer or machine will replace your job within the next 10 years?



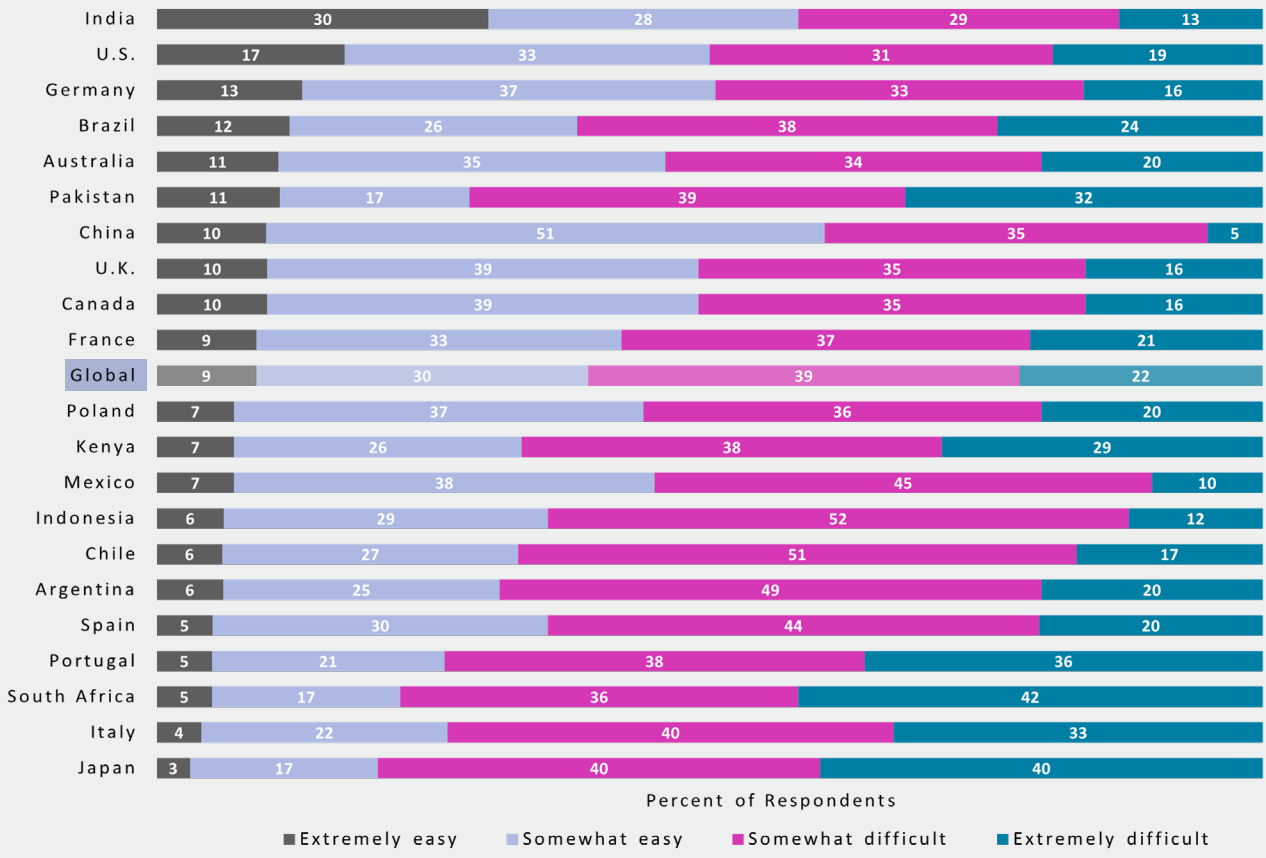
Overall, respondents are more negative than positive about their likelihood of finding a new job if they lose theirs. Globally, 61% of respondents believe finding a new job would be extremely difficult (22%) or somewhat difficult (39%).

Outliers include China and India, in which more than half of respondents believe finding a new job would be somewhat or extremely easy (61% and 58%, respectively). Indian respondents display by far the highest belief that finding a new job would be extremely easy (30%). The country with the next-highest proportion of respondents believing this would be extremely easy is the United States of America (17%).

Respondents in South Africa and Japan are the most likely to believe finding new employment would be extremely difficult (42% and 40%, respectively).

3.2 Confidence in finding a new job (%)

If you lost your job, how easy or difficult would it be to find another source of income or a comparable job?



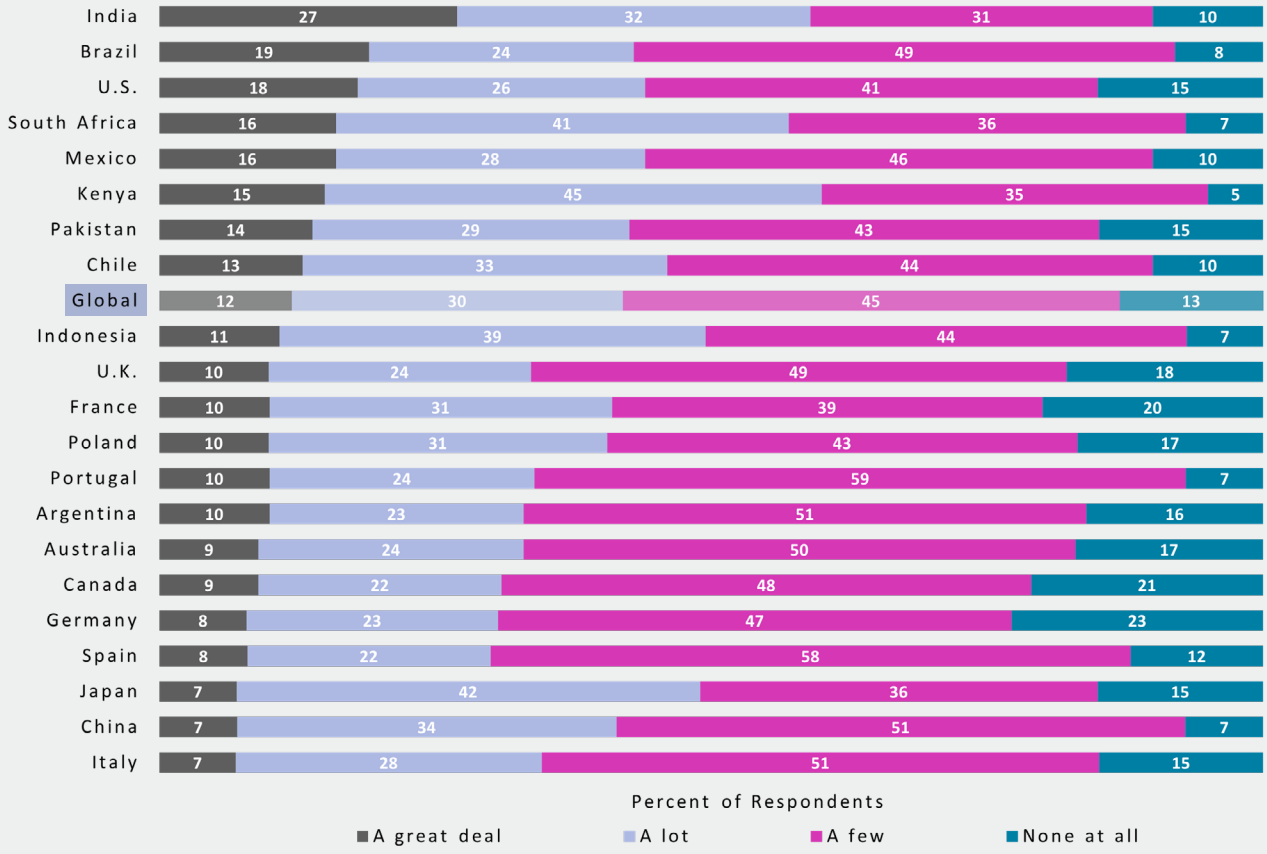
Job loss of others

Globally, people have similar views about their own job loss and that of their friends and family. 42% of global respondents project a great deal or a lot of job losses in the next 10 years.

Most countries are divided, indicating a few job losses are likely (31% to 58%). Indians are most likely (27%) to believe a great deal of their friends' and families' jobs will be replaced by computers or machines in the next 10 years. Kenyans and South Africans also see job loss as largely likely, with 60% and 57%, respectively, indicating a lot or a great deal of jobs will be lost. At the opposite end of the spectrum, people from Canada, France and Germany are most likely to think their close social circle is safe from technological displacement (21%, 20% and 23%, respectively, foresee no job losses).

3.3 Perceived vulnerability to job loss among friends and family (%)

How many of your friends and family do you think will lose their jobs to a computer or machine in the next 10 years?

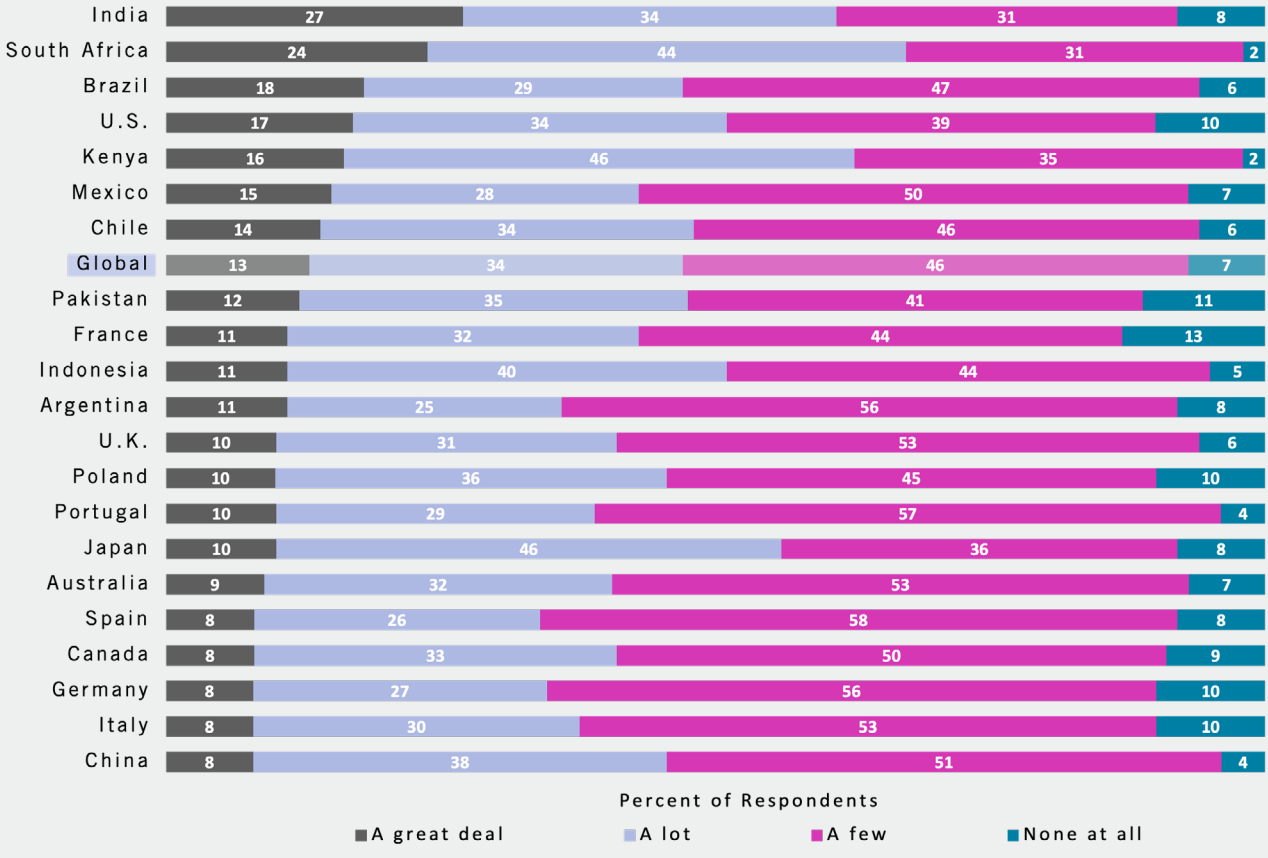


Numbers remain relatively stable when looking at perceived job lost in ones' local community. 47% of global respondents believe that a great deal or a lot of these people will lose their jobs in the next 10 years. The number of respondents who believe none will lose their jobs is slightly smaller than in other charts, at 7%.

Indian, South African, and Kenyan respondents expect the most job losses; 61%, 68%, and 62%, respectively, believe that a great deal or a lot of local community members will lose their jobs to a computer or machine in the next 10 years. Only 2% of South African and Kenyan respondents think no jobs will be lost. Indians are the most likely to think it will affect their communities a great deal (27%).

3.4 Perceived vulnerability to job loss in local community (%)

How many members of your local community do you think will lose their jobs to a computer or machine in the next 10 years?



Job loss in the future

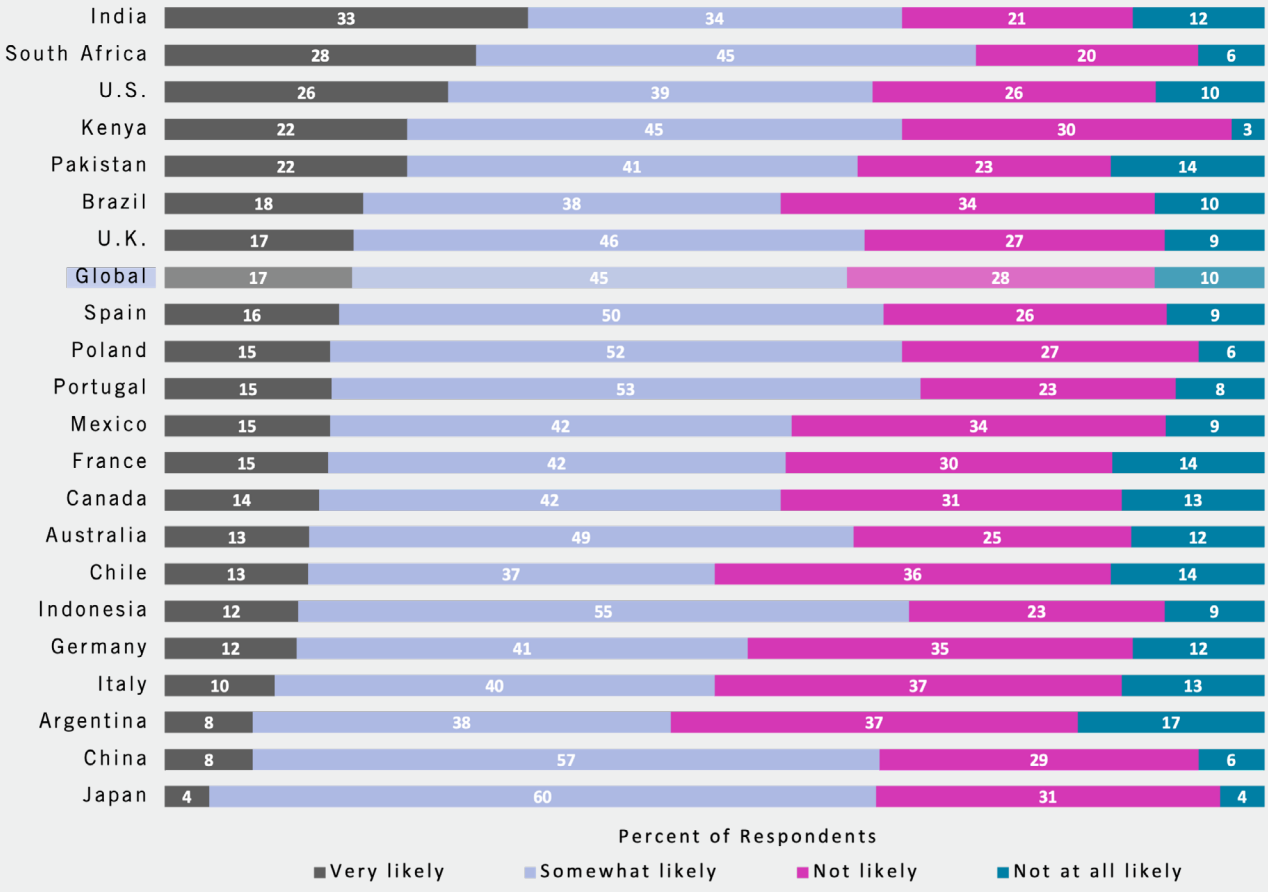
Respondents with children were asked how likely they believe it is that their children will lose their jobs to a computer or machine.

The majority of global respondents believe their children are very (17%) or somewhat (45%) likely to lose their jobs to a computer or machine.

Most Japanese respondents feel their children are somewhat likely to lose their jobs to computers or machines (60%), and one-third of Indians believe this is very likely (33%). Argentinians are the most doubtful, with 17% reporting their children are not at all likely to lose their jobs to a computer or machine, and 37% are not likely.

3.5 Perceived vulnerability of respondents' own children to job loss (%)

How likely do you think your child(ren) is(are) to lose their job(s) to a computer or machine?

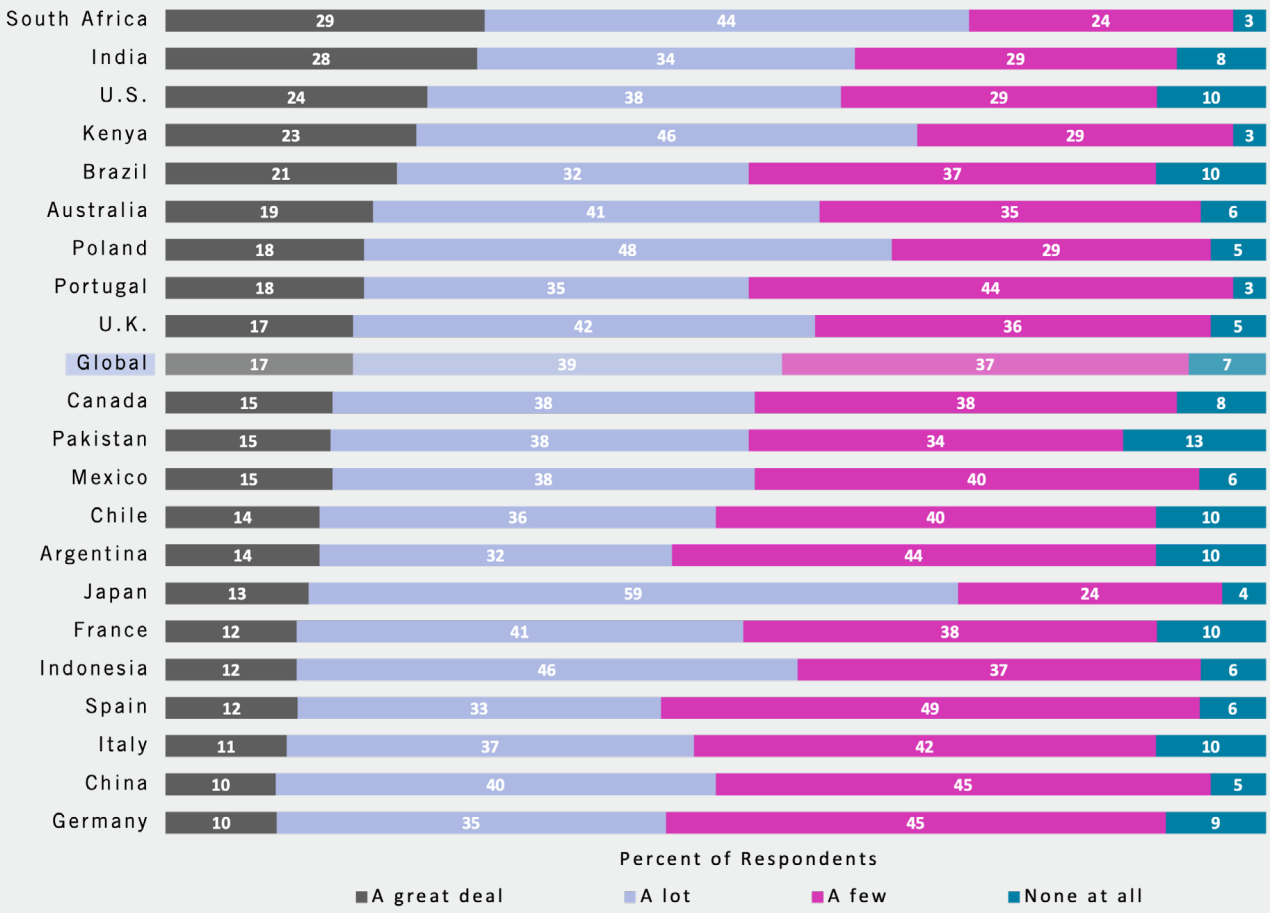


All respondents were asked how many members of future generations they think are likely to lose their jobs to a computer or machine.

Those in South Africa, Japan, Kenya and Poland are most likely to think that a great deal or a lot of future generations will lose their jobs to computers or machines (73%, 72%, 69% and 66%, respectively). In Spain, Germany and Argentina, more than half of respondents think future generations will suffer no or only a few job losses (55%, 54% and 54% respectively).

3.6 Perceived vulnerability of future generations to job loss (%)

How many members of future generations do you think will lose their jobs to a computer or machine?



IV. Regulation and Trust

The current applications of AI are numerous and intersect across many sectors. As potential harms become more and more apparent, how to regulate this emergent technology and who should do so are key considerations. In response to technological change, many citizens will demand safeguards and accountability from government, technology companies, and other relevant actors. Citizens may want companies to clearly and publicly state when they are using AI, or ask governments to introduce new laws to deal with the unique challenges of living in a world with widespread AI. How AI actors respond to public opinion will dramatically affect the extent to which these new technologies affect society.

A range of questions aimed to determine what people want various actors to do in response to technological changes. In most regions, there is greater trust in technology companies than in governments to regulate AI—in fact, technology companies are the globally preferred actor for many forms of regulation and trust asked about below. Non-profits and the military are generally the least preferred and least trusted actors for these applications.

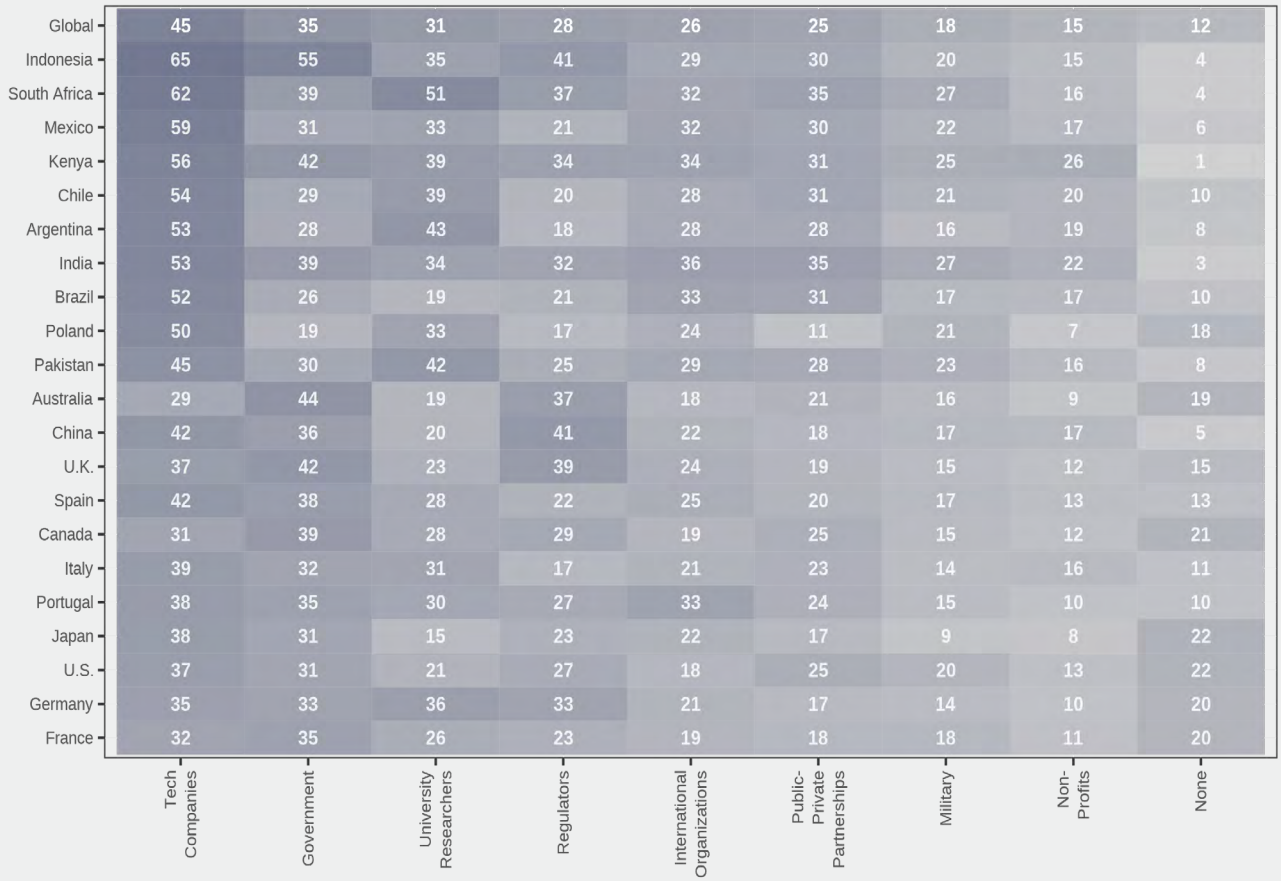
AI regulation

When asked which actors they believe are best placed to regulate AI, global respondents prefer technology companies (45%) and government (35%). However, preferences vary among countries. Technology companies are the most popular option selected in Indonesia, at 65%, and is the strongest agreement with one actor anywhere. Australians demonstrate the lowest global level of trust in technology companies, with only 29% believing they are best placed to regulate AI.

Indonesia also stands out as the only country in which more than half of respondents believe that the government is best placed to regulate AI. Australia, Kenya and the United Kingdom also demonstrate relatively high confidence in government (44%, 42%, and 42% respectively).

4.1 Best actors to regulate AI (%)

In your opinion, which of the following actors is best placed to regulate AI? (You can select as many as you like.)

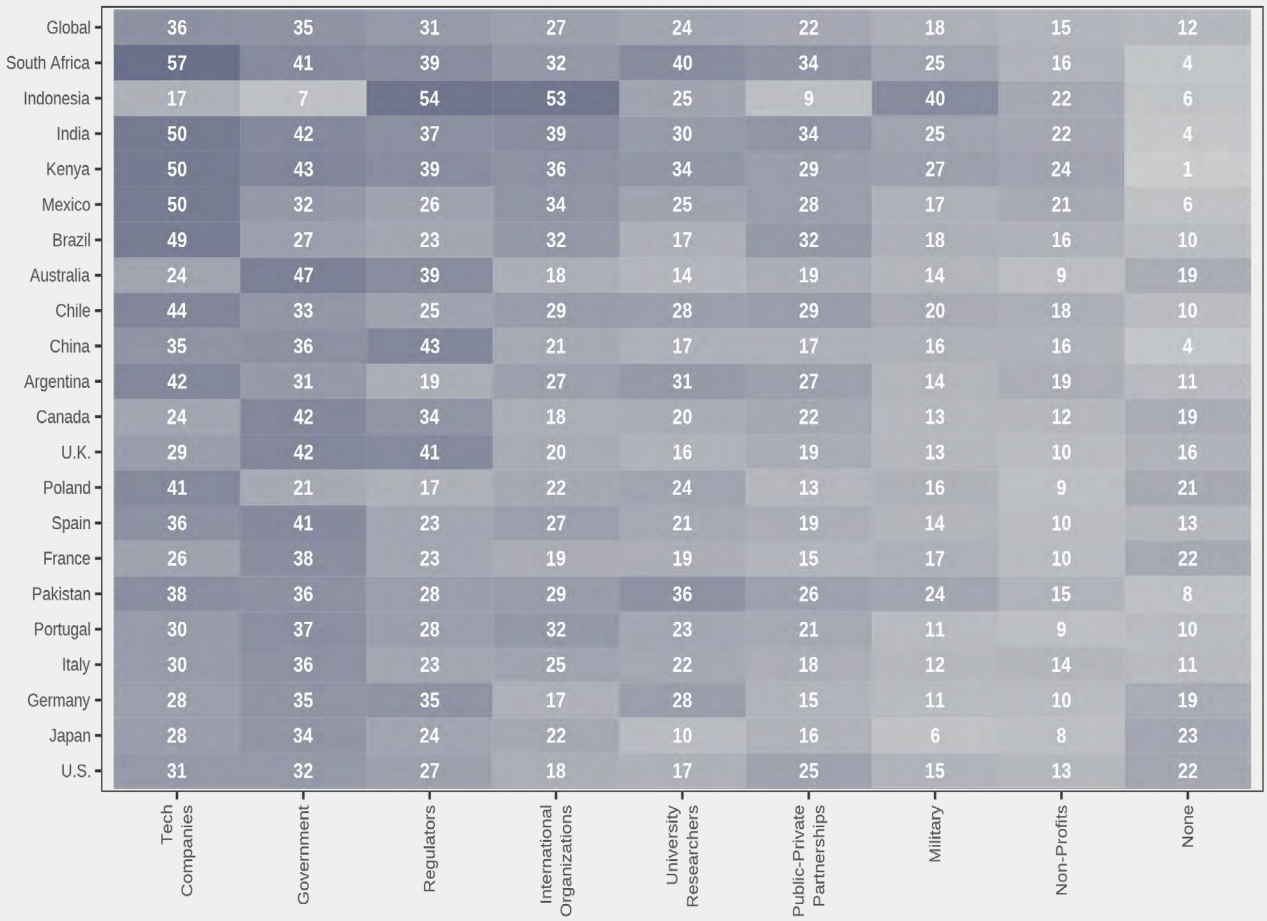


When asked which of the following actors are best placed to regulate privacy issues linked to AI, global respondents again rate technology companies (36%) and government (35%) as the most preferred options. It's notable that there is less confidence in technology companies for privacy regulation than AI regulation overall (45%, Figure 4.1).

Indonesians are the outliers, rating these two actors lower than any other country (7% and 17%). Instead, they strongly prefer international organizations and regulators (over 50% for each) to regulate AI privacy. This is especially notable in comparison to their scoring for regulating AI in general, rating government and technology companies the highest (55% and 65%, respectively, Figure 4.1).

4.2 Best actors to regulate privacy (%)

In your opinion, which of the following actors are best placed to regulate privacy issues linked to AI? (You can select as many as you like.)



Trust in the use of AI and data

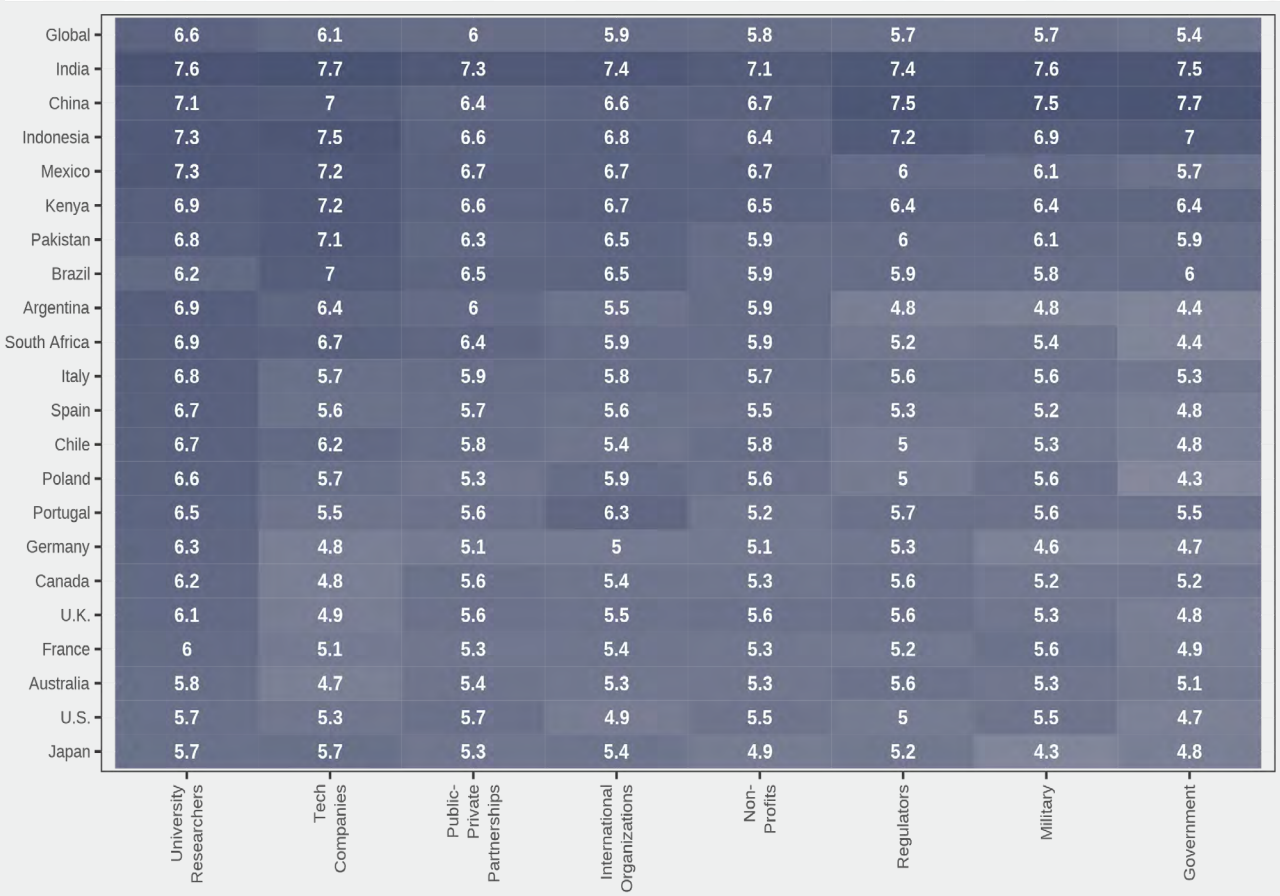
Respondents are not particularly trusting of any actor's ability to use AI safely. University researchers are the most trusted to use AI safely; they were rated a 6.6 out of 10. Technology companies continue to receive comparatively high levels of support (6.1) as the second-most trusted actor of those listed. Government just edges out government-appointed independent regulators and the military as the least trusted actor to use AI safely (5.4).

Among the countries surveyed, Brazil, China, India, Indonesia, Kenya, Mexico and Pakistan express the highest level of trust in technology companies (7 or higher) to use AI safely. China, India, Indonesia and Mexico also express high support for university researchers (greater than 7).

India has the highest trust scores overall, rating all listed actors above 7. Argentina, Poland, and South Africa display the least trust in government (4.4, 4.3, and 4.4). The only other score this low was awarded by Japan to the military (4.3).

4.3 Trust in various actors to use AI safely (out of 10)

On a scale from 0 (zero trust) to 10 (complete trust), how much do you trust each of the following actors in using AI safely?



By a significant margin, university researchers are the most trusted actors to protect data and privacy: they scored a global average of 6.3 out of 10 compared to all other options, which fall between 5.5 and 5.8. International organizations, public-private partnerships and technology companies were the next most trusted (5.8). The government is the least trusted on average (5.5) but scores range from a high of 7.8 in China to a low of 4.3 in Argentina and Poland.

China, India, Indonesia, Kenya and Mexico are generally more trusting. They have significant trust in the government and the military to protect data and privacy. Among the least trusting–Japan, the United States of America, Australia and France–there is little trust in either of these actors nor of technology companies.

4.4 Level of trust in various actors to protect privacy (out of 10)

On a scale from 0 (zero trust) to 10 (complete trust), how much do you trust each of the following actors in protecting data and privacy?

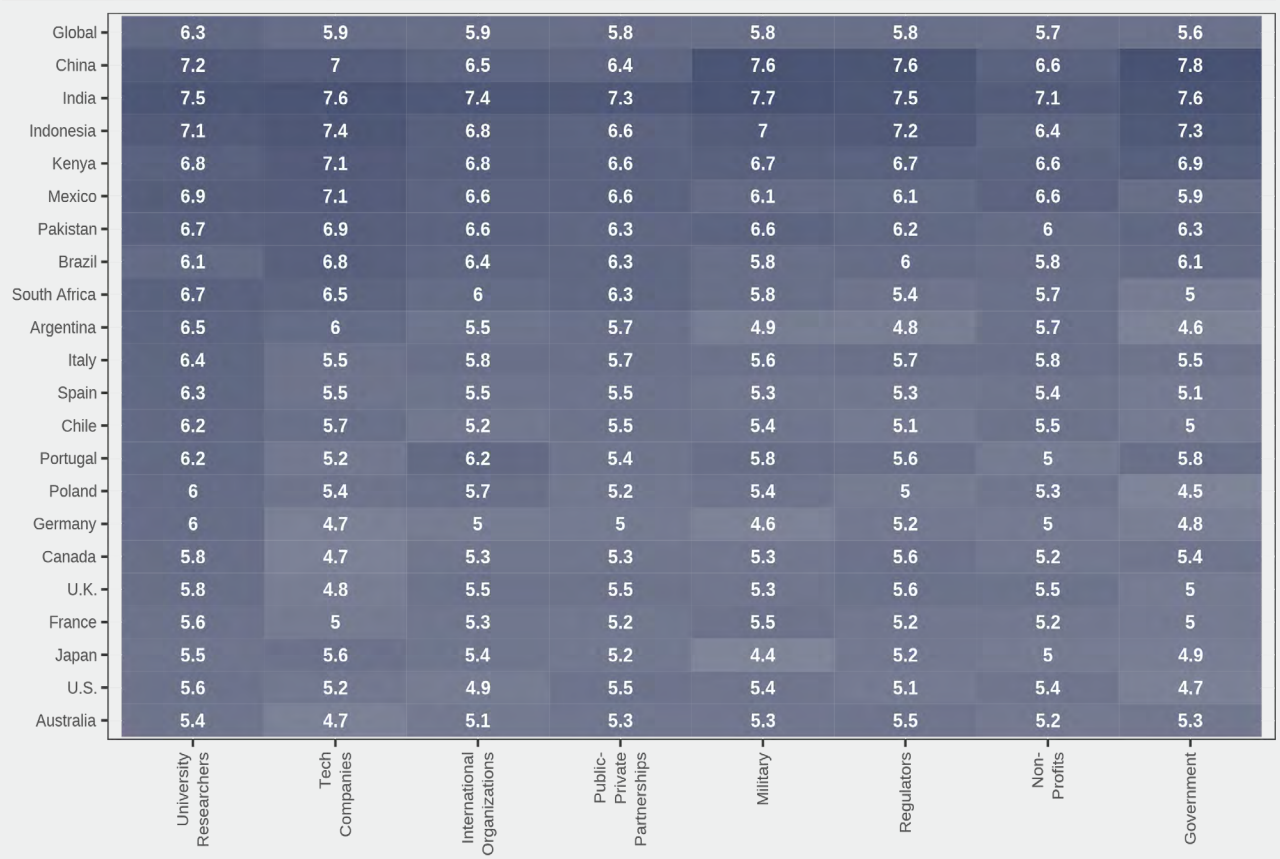
	University Researchers	International Organizations	Public-Private Partnerships	Tech Companies	Military	Non-Profits	Regulators	Government
Global	6.3	5.8	5.8	5.8	5.7	5.7	5.7	5.5
China	7	6.5	6.4	6.9	7.7	6.6	7.5	7.8
India	7.5	7.4	7.3	7.6	7.7	7.1	7.4	7.6
Indonesia	7	6.7	6.5	7.3	6.9	6.3	7.2	7.2
Kenya	6.6	6.8	6.7	7.1	6.7	6.5	6.7	6.7
Mexico	7	6.6	6.6	6.9	6.1	6.6	6	5.7
Pakistan	6.7	6.4	6.1	6.8	6.4	5.9	6.1	6.1
South Africa	6.8	5.9	6.2	6.3	5.6	5.8	5.2	4.7
Brazil	5.9	6.3	6.3	6.7	5.7	5.8	5.9	5.9
Argentina	6.5	5.3	5.7	5.8	4.8	5.7	4.7	4.3
Italy	6.4	5.7	5.7	5.3	5.6	5.8	5.6	5.4
Spain	6.3	5.4	5.5	5.2	5.2	5.5	5.3	5
Poland	6.2	5.7	5.2	5.2	5.5	5.4	4.9	4.3
Portugal	6.1	6.1	5.3	4.9	5.7	5.1	5.6	5.6
Chile	6	5.2	5.4	5.5	5.3	5.5	4.9	4.9
Germany	6	5	5	4.6	4.5	5.1	5.2	4.8
Canada	6	5.4	5.4	4.6	5.3	5.2	5.6	5.3
U.K.	5.9	5.5	5.6	4.7	5.3	5.6	5.6	5
France	5.7	5.3	5.2	4.9	5.5	5.3	5.2	4.9
Australia	5.6	5.2	5.3	4.6	5.3	5.2	5.5	5.3
U.S.	5.6	5	5.6	5.2	5.4	5.4	5	4.7
Japan	5.4	5.3	5.2	5.4	4.3	4.9	5.2	4.8

In terms of these same actors ensuring AI safety and security, university researchers are the most trusted, rated a 6.3 out of 10. International organizations and technology companies follow closely (5.9). That said, on a global level there is little discrepancy among the trust levels for each of the listed actors (there is less than a one-point difference between the lowest and highest trust scores).

India once again demonstrates particularly high trust scores (all above 7), while Australian, Japanese, American and French respondents demonstrate the lowest scores (all below 5.7).

4.5 Trust in various actors to ensure AI safety and security (out of 10)

On a scale from 0 (zero trust) to 10 (complete trust), how much do you trust each of the following actors in ensuring safety and security linked to AI?



V. ChatGPT

Developed by OpenAI and first released to the public in November 2022, ChatGPT is a generative AI application that creates unique, conversational text in response to a user's queries or prompts.

Since its launch, ChatGPT has demonstrated itself to be useful in a wide variety of applications. It is anticipated to be increasingly disruptive in many sectors, including education, medicine and media. The ability of generative AI, like ChatGPT, to not only perform administrative tasks but also to independently make decisions, poses both opportunities and risks to a wide range of workers.

It also presents particular areas of concern. In post-secondary education and academic research, it is a challenge to issues of authorship and academic integrity. As a result, since ChatGPT's release, new tools have been developed with the aim of detecting AI-generated text.

ChatGPT has also become notorious for generating confident-sounding responses that contain false information, often referred to as hallucinations. Like other large language models (or LLMs), ChatGPT is a probabilistic model trained using enormous amounts of data. Concerns about its plausible but false responses are in part due to the black box nature of its proprietary program: it is difficult to provide a definitive explanation of how and why it answers questions in a particular way.

General awareness and usage of ChatGPT

Globally, about two-thirds of respondents (63%) indicate they have heard of ChatGPT.

While those self-reporting the most awareness of ChatGPT are in India, Kenya, Indonesia and Pakistan (82%, 81%, 76% and 76%, respectively), only Poland has a majority of respondents who have not heard of it. Italy, Chile and the United States of America all have comparatively low levels of awareness (51%, 51% and 55%, respectively).

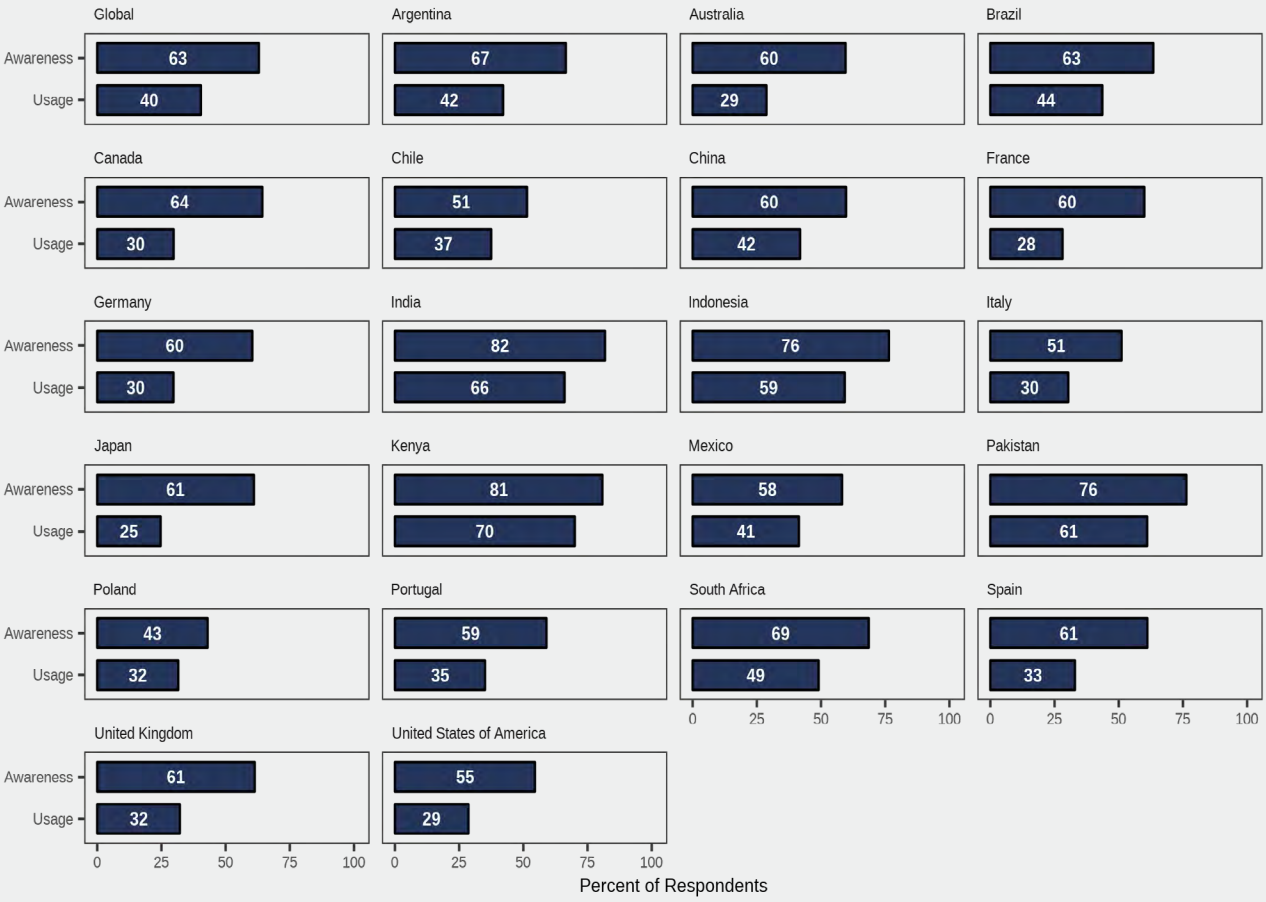
But, while most people have heard of ChatGPT, only 40% of global respondents report having used it.

Self-reported usage varies significantly among countries. Those reporting the highest levels of usage are Kenya (70%), India (66%), Pakistan (61%) and Indonesia (59%).

In all other countries, less than 50% of respondents have used ChatGPT. Japanese respondents report the lowest usage of ChatGPT at 25%.

5.1 Awareness and usage of ChatGPT (%)

Have you heard of ChatGPT? Have you already used ChatGPT?



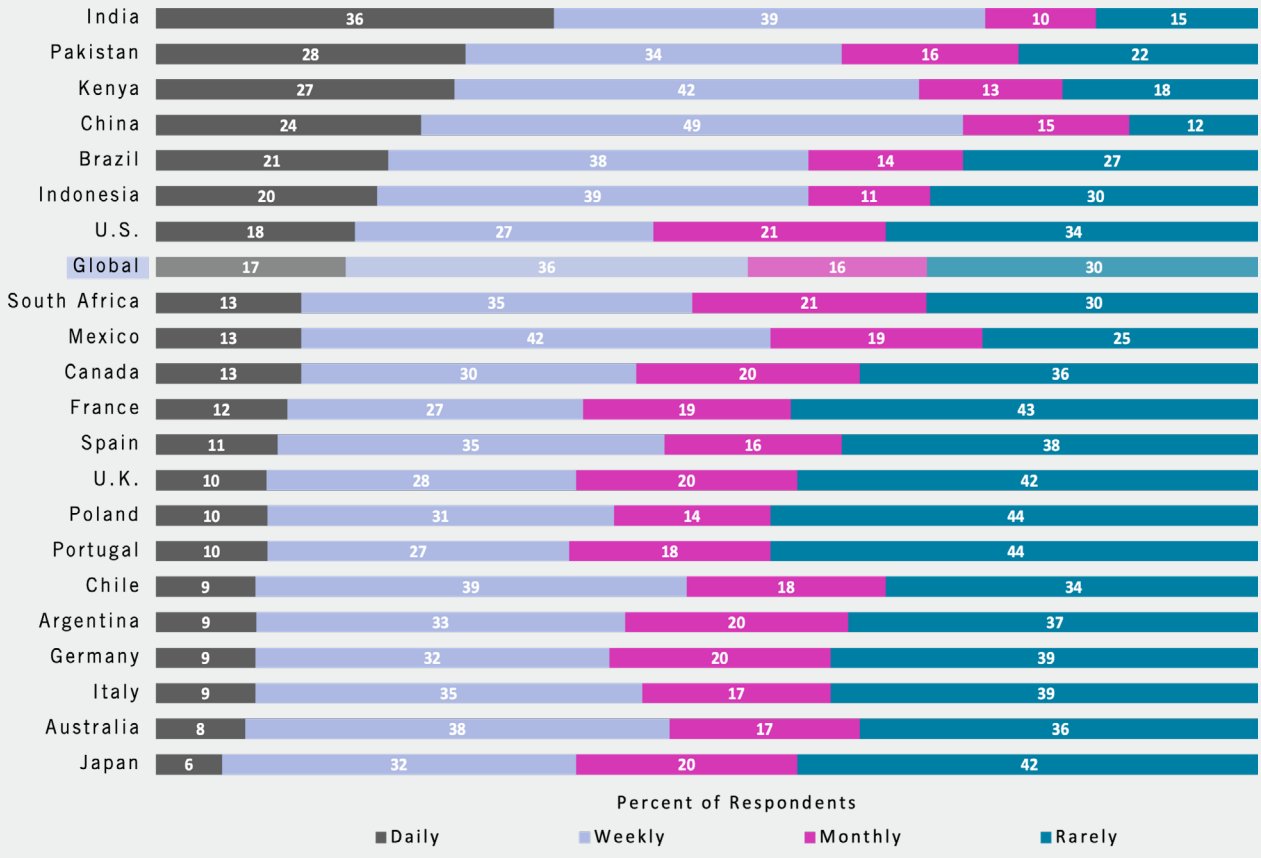
Frequency of ChatGPT usage

Of respondents who report having previously used ChatGPT, slightly more than a third (36%) indicate using it weekly, while slightly less than a third (30%) use it rarely. Fewer respondents use it monthly (17%) or daily (17%).

ChatGPT is used most frequently in India, China, Kenya and Pakistan, with 75%, 73%, 69% and 62% of respondents, respectively, reporting using ChatGPT daily or weekly. Self-reported daily usage is highest in India (36%).

5.2 ChatGPT usage frequency (%)

How often do you use ChatGPT?



Purpose of ChatGPT use

ChatGPT is primarily used for work purposes (33%), followed by, in descending order, for education, as an alternative to Google and for fun.

Japanese, Italian and French respondents are more likely to report using it as an alternative to Google (42%, 35% and 30%, respectively).

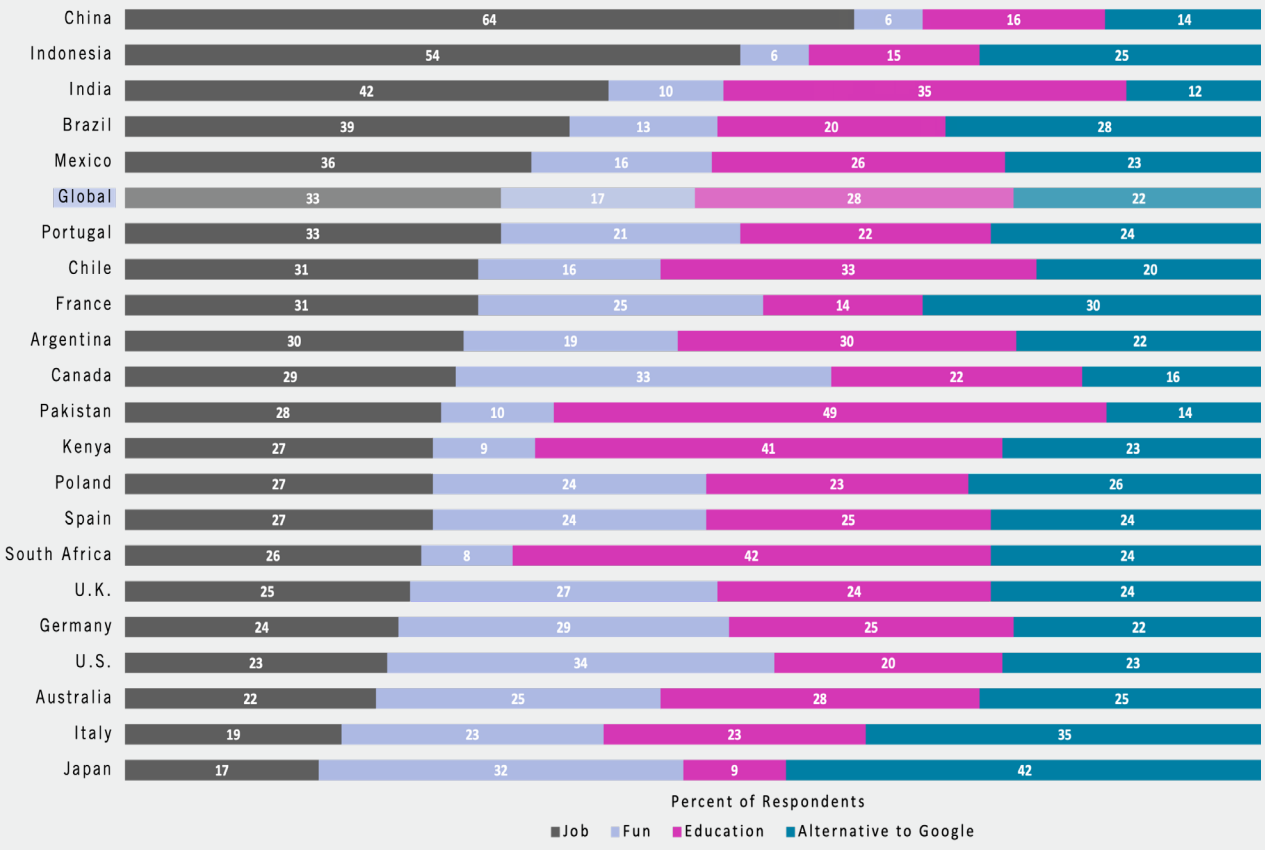
Respondents in the United States of America, Canada, Japan, Germany and the United Kingdom are more likely to use it for fun (about 30% of respondents in each country).

Pakistanis are the most likely to use ChatGPT for education (49%). This is also the most common use in Argentina, Chile, Kenya and South Africa (between 30% and 40%).

Finally, work is the most common reported use for ChatGPT in Brazil, China, Indonesia, India, Brazil and Mexico.

5.3 ChatGPT type of usage (%)

What do you use ChatGPT for?



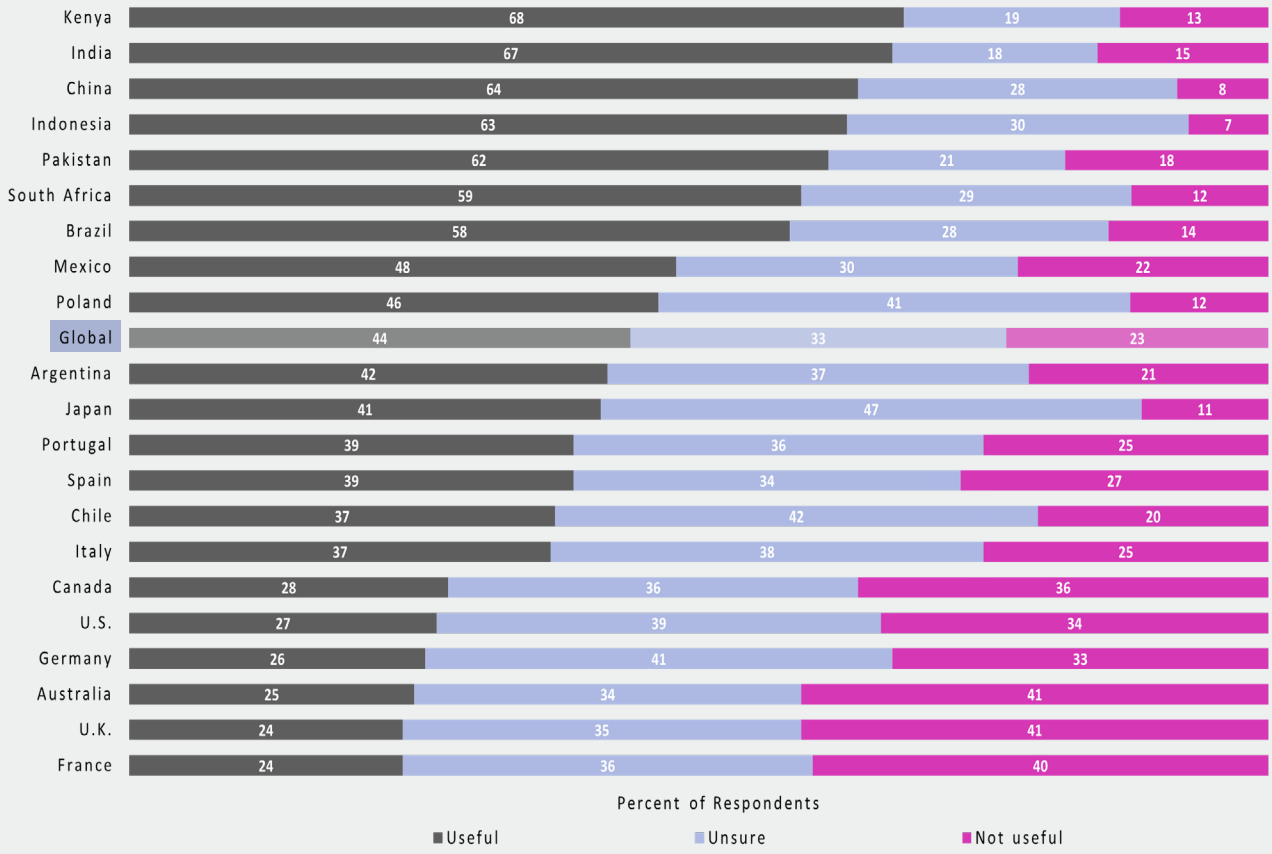
Usefulness of ChatGPT

Just under half (44%) of global respondents think ChatGPT could be useful in their daily lives, and an additional 33% are unsure.

Perceived usefulness is particularly low in Australia, Canada, France, Germany, the United Kingdom and the United States of America. In each of these countries, less than 30% of respondents believe ChatGPT could be useful in their daily lives. In China, India, Indonesia, Kenya and Pakistan, however, more than 60% of respondents believe it could be useful.

5.4 Perceived usefulness of ChatGPT in daily life (%)

Do you think ChatGPT could be useful to you in your daily life?



Likelihood of future ChatGPT use

While less than half of global respondents (40%) report having already used ChatGPT, most (64%) indicate they are likely to use it in the next year.

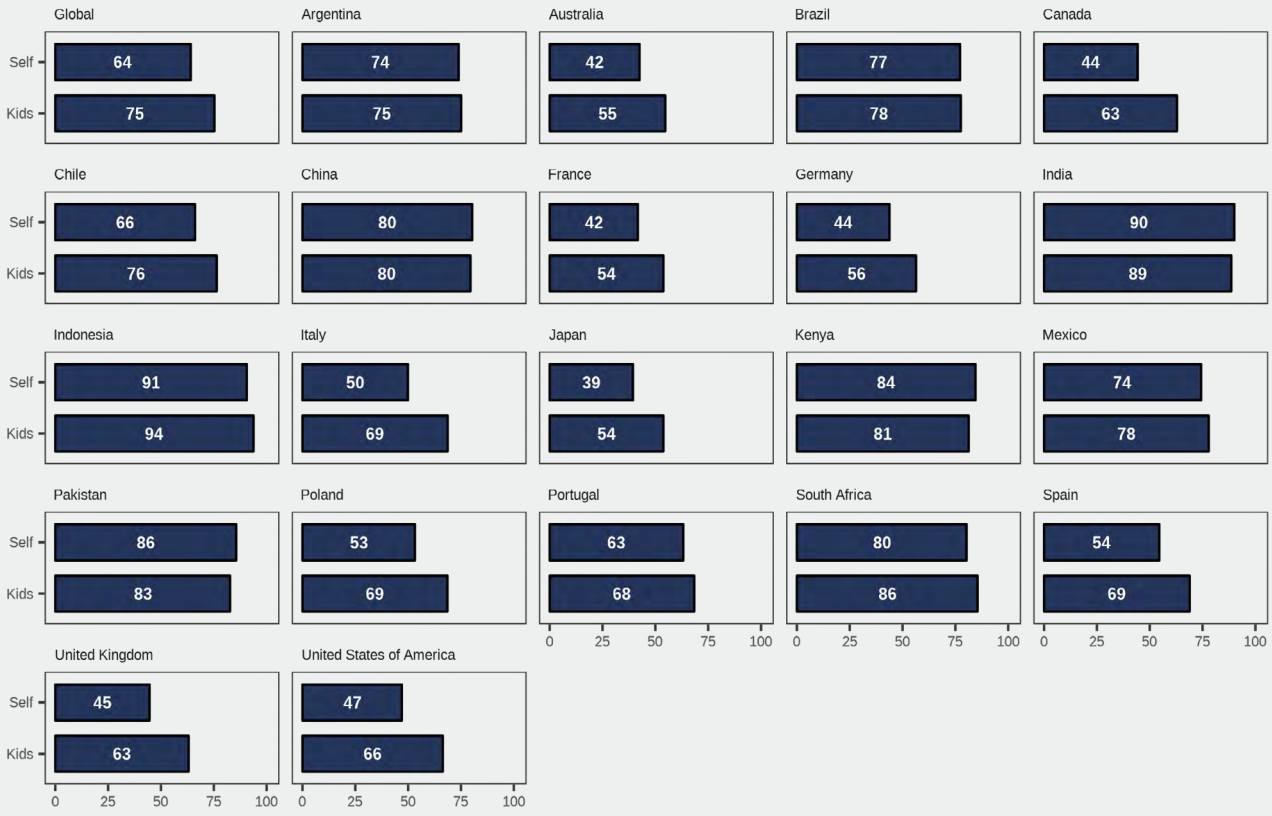
Indians and Indonesians are most likely to believe they will use ChatGPT in the next year (90% and 91%, respectively). Kenya, Pakistan, South Africa and China are close behind, with over 80% of people indicating they are likely to use it.

Less than half of people from Australia, Canada, France, Germany, Japan, the United Kingdom and the United States of America say that they are likely to use ChatGPT. Those in Japan are least likely to think they might use it (39%).

A significant majority (75%) of respondents with children believe their children are likely to use ChatGPT in the next year. Overall, people are slightly more likely to think that their children will use it than they will themselves, with the exception of China, India, Kenya and Pakistan. In the United States of America, there is the biggest gap between parents' expected use (47%) and that of their children (66%).

5.5 Perceived future usage of ChatGPT (%)

How likely are you to use ChatGPT in the next year? How likely do you think your kid(s) are going to use ChatGPT in the next year?
[This second question was only asked to respondents who reported being parents earlier in the survey.]



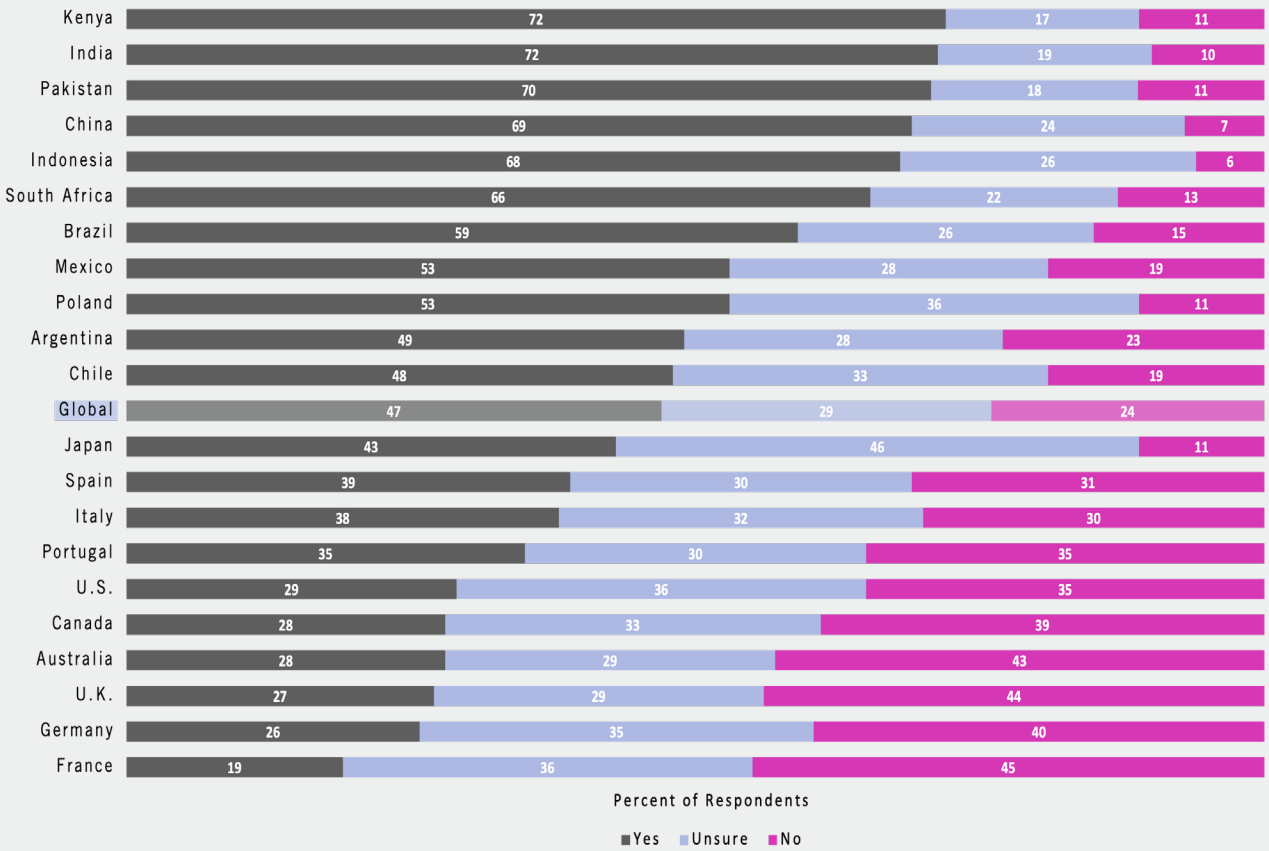
ChatGPT at work

USEFULNESS OF CHATGPT AT WORK

Almost twice as many people think ChatGPT will be useful to them in their daily lives (47%) as think it will not (24%). More than 65% of respondents in China, India, Indonesia, Kenya, Pakistan and South Africa believe it could be useful, while less than 30% of those in Australia, Canada, France, Germany, the United Kingdom and the United States of America think it could.

5.6 Perceived usefulness of ChatGPT at work (%)

Do you think ChatGPT could be useful to you when working?



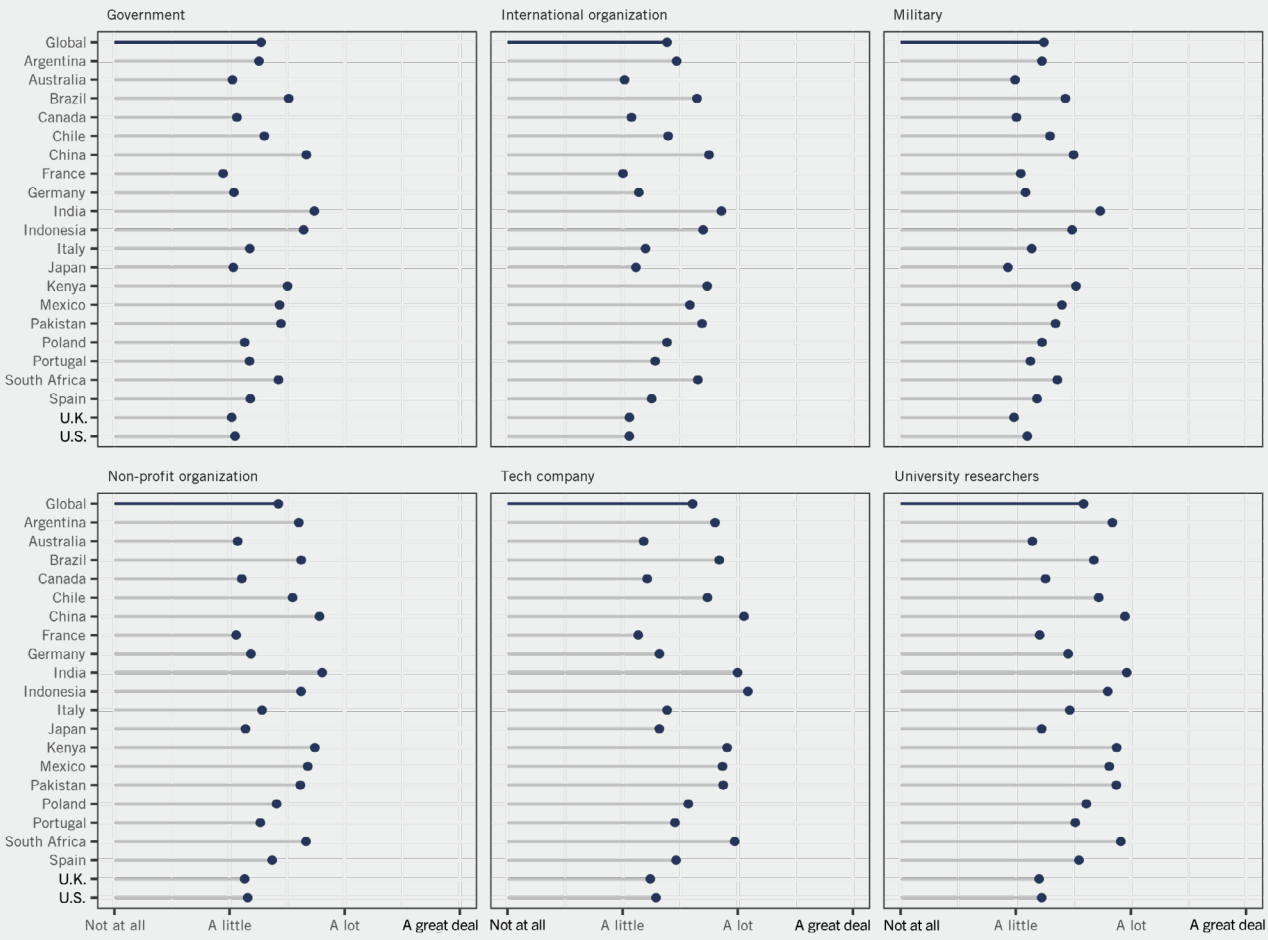
ALLOWING WORKERS TO USE AI TOOLS

Respondents were asked whether and how much various types of organizations should allow their workers to use AI tools such as ChatGPT. Overall, respondents think most of the suggested organizations should be allowed to use them either a little or a lot. More than half of global respondents said technology companies and university researchers should use them a lot or a great deal (54% and 53% respectively). Only a minority felt they should not be allowed.

Between 14% and 20% indicated AI tools should not be used at all by the proposed organizations with the exception of the military, which a quarter of respondents said should not use ChatGPT. At the same time, a greater global proportion (26%) felt the military should use such tools a lot. The least popular usage category was by the government (63% indicating a little or not at all).

5.7 Extent to which organizations should permit the use of AI tools among their workers (%)

To what extent should the following organizations and companies allow their workers to use AI tools such as ChatGPT?



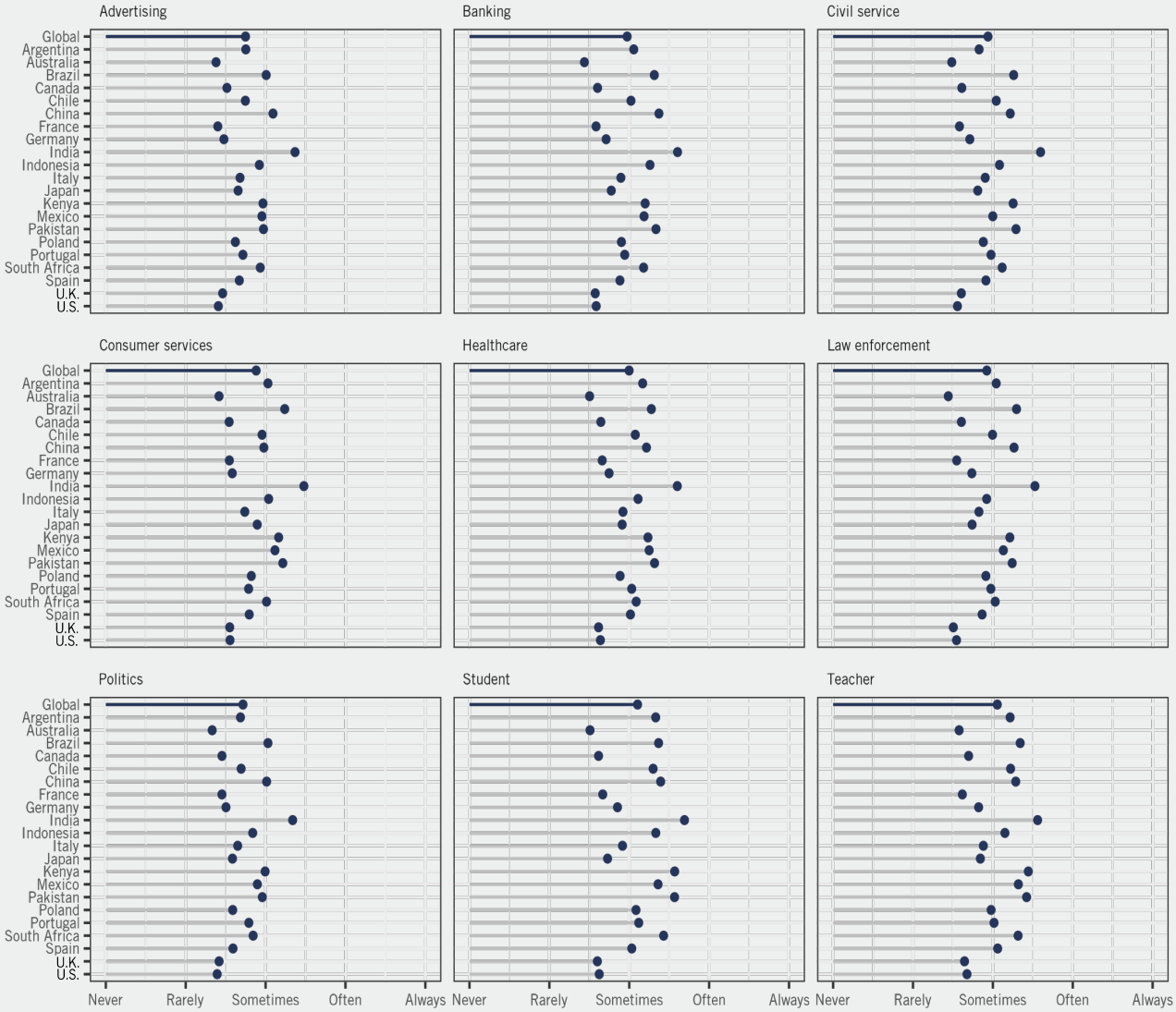
Respondents were then asked about the use of ChatGPT in a variety of other sectors. A significant number of global respondents feel ChatGPT should never or rarely be used by those working in politics (42%).

A majority of Indians agree with always or often using ChatGPT in all the proposed jobs except politics (47%) and advertising (47%).

On average, global respondents feel that students should be allowed to use ChatGPT (39% say always or often) slightly more than teachers (36%). But whereas a majority of people from India (60%), Pakistan (56%) and Kenya (54%) think students should be allowed to use it always or often, only 24% of Americans, 21% of Australians and 18% of Japanese respondents agree.

5.8 Occupations that should be allowed to use AI tools like ChatGPT at work

For each job type, should employees be allowed to use AI tools such as ChatGPT to help them in their work/task?



THE IMPACT OF CHATGPT ON THE FUTURE OF WORK

The majority of people (59%) think ChatGPT will make jobs easier. Slightly more people think it will replace humans (28%) than think it will have no effect (13%).

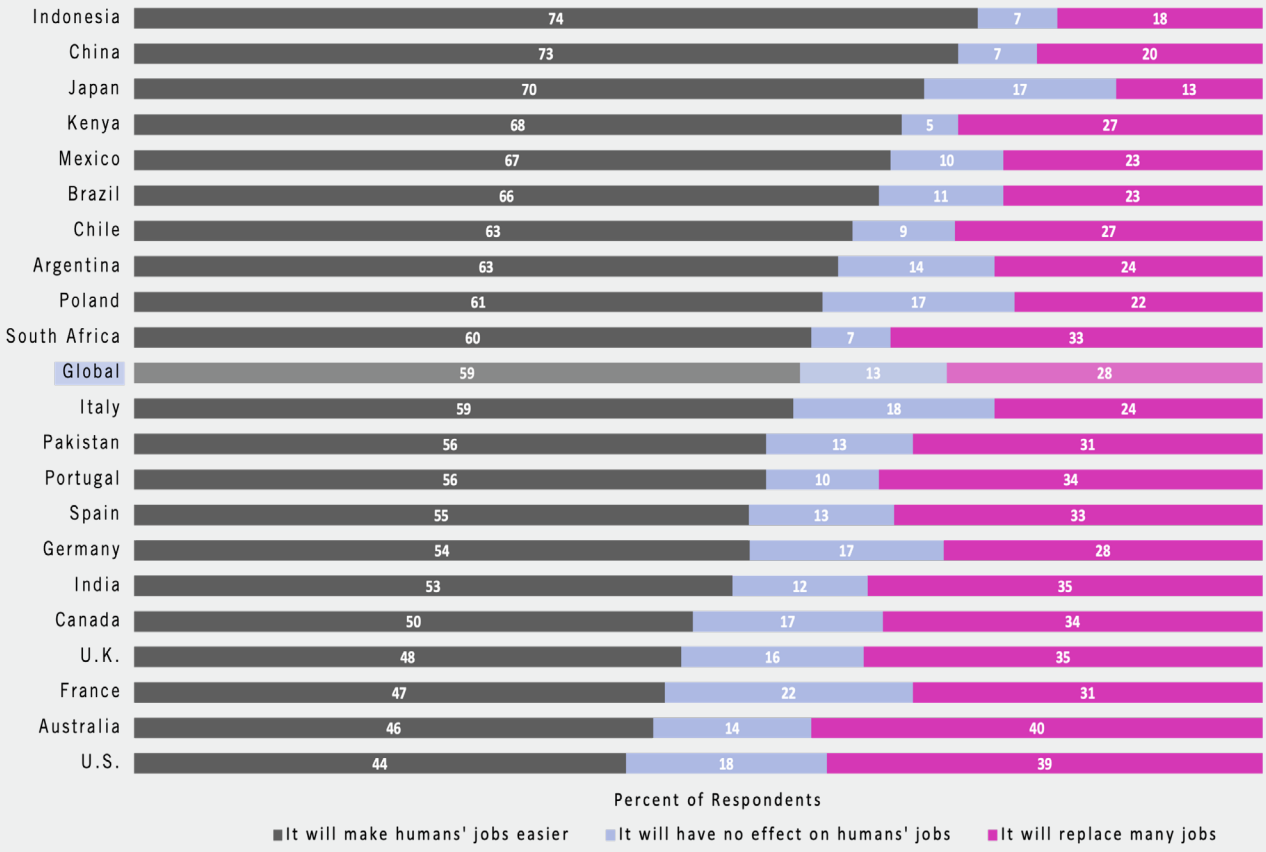
Respondents in China, Indonesia, Kenya and South Africa are least likely to believe it will have no effect on jobs (7%, 7%, 5% and 7%, respectively).

Less than 50% of respondents in Australia, France, the United Kingdom and the United States of America think ChatGPT will make jobs easier, as compared to more than 65% of respondents in Brazil, China, Indonesia, Japan, Kenya and Mexico.

Australians and Americans are most likely to believe ChatGPT will replace humans (40% and 39%, respectively) and those in China, Indonesia and Japan are the least likely to believe this (20%, 18% and 13%, respectively).

5.9 Perceived effect of ChatGPT on the future of work (%)

How do you think ChatGPT will affect the future of work?



LOSS OF JOBS DUE TO AI TECHNOLOGIES

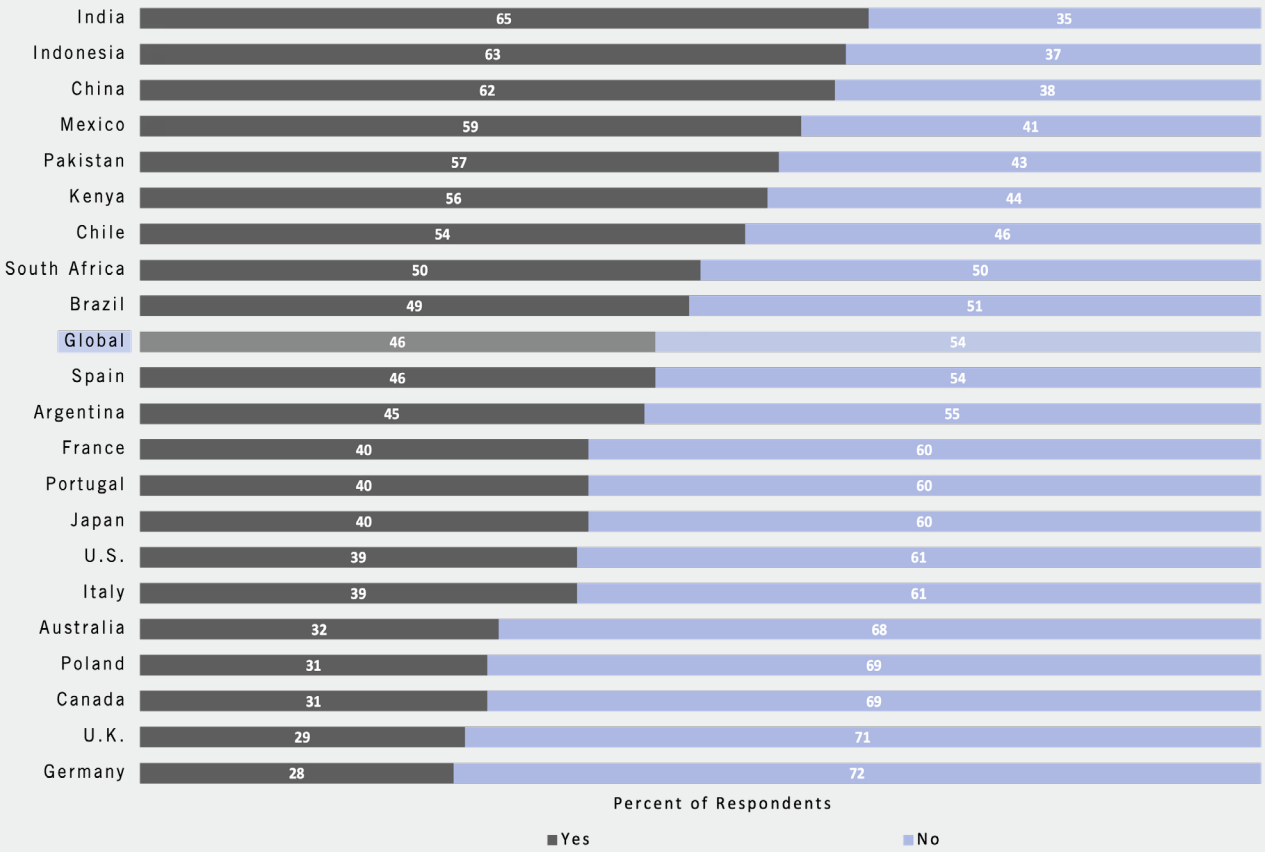
Globally, people are divided on whether ChatGPT or technologies like it will replace their jobs in the next 10 years: 46% believe it will replace them.

Those most likely to think their jobs will be replaced are those in India, Indonesia and China, in which more than 60% of people believe ChatGPT will replace their job in the next 10 years. More than 50% of respondents in Chile, Kenya, Mexico and Pakistan believe the same.

Less than 35% of respondents from Australia, Canada, Poland and the United Kingdom believe they will lose their jobs to ChatGPT. Germans are the least likely to think they will be replaced (28%).

5.10 Perception that ChatGPT will replace one's job in the next 10 years (%)

Do you think ChatGPT or technologies like it will replace your job within the next 10 years?



Generally, people do not think their communities will lose many jobs to ChatGPT (Figure 5.11). Nearly twice as many people think only a few jobs will be lost (47%) as believe a lot of jobs will (29%). Respondents in Pakistan are the most likely to think no jobs will be lost (17%) but they are also above the global mean for a great deal of jobs being lost (16% compared to 12%).

Respondents in India feel most strongly that jobs will be lost to ChatGPT. They believe a great deal of jobs will be lost in their communities (31%) and in future generations (28%).

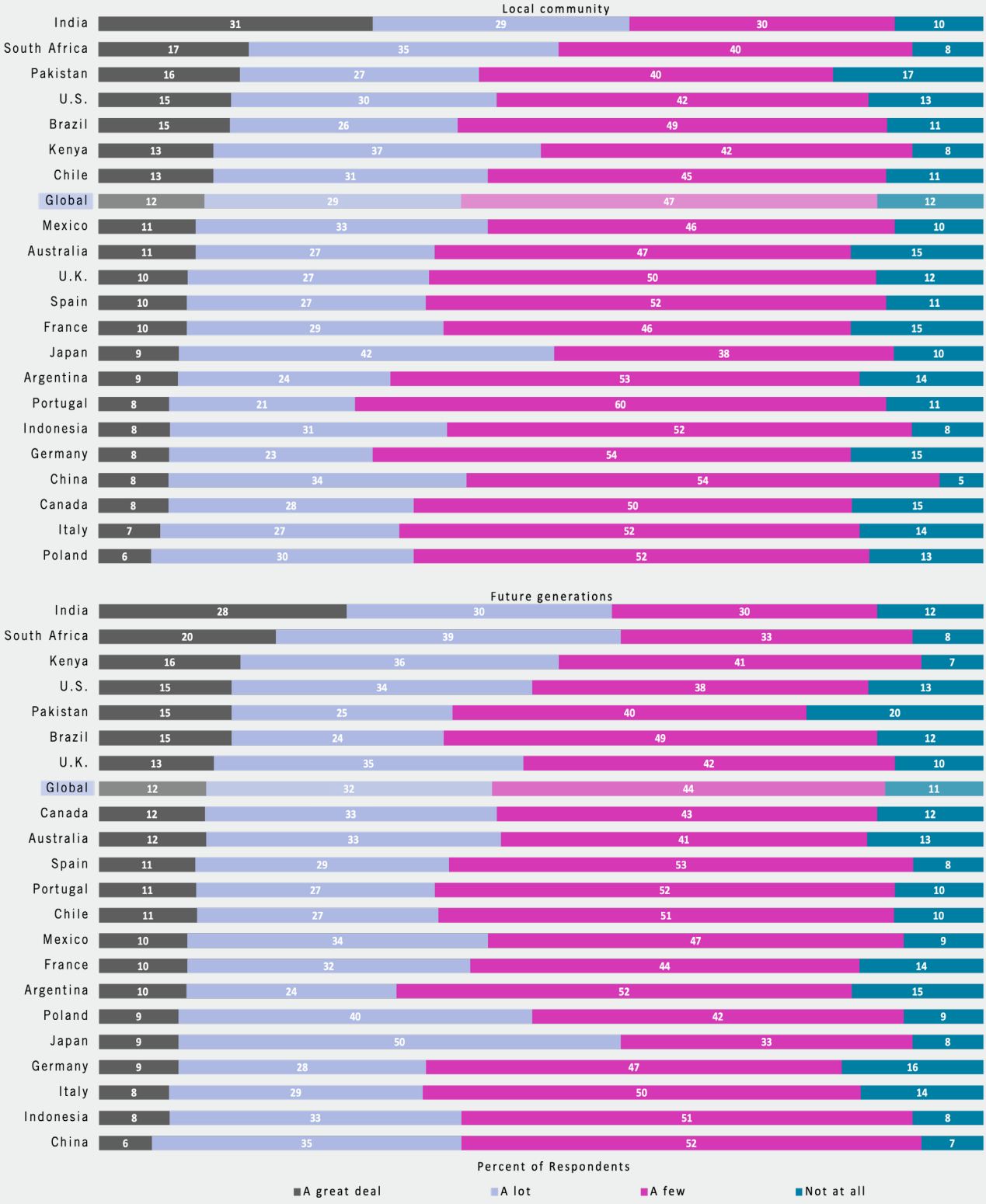
Globally, more than half of respondents are doubtful about the long-term effects, with 55% indicating a few or no jobs will be lost to ChatGPT.

The widespread fascination with ChatGPT made it synonymous with AI in the minds of most consumers. However, it represents only a small portion of the ways that AI technology is being used today.

— Respondent (India)

5.11 Perceived job replacement in local community and future generations (%)

How many members of your local community do you think will lose their jobs to a technology like ChatGPT in the next 10 years? And how many members of future generations?



ASSISTANCE FROM CHATGPT AT WORK

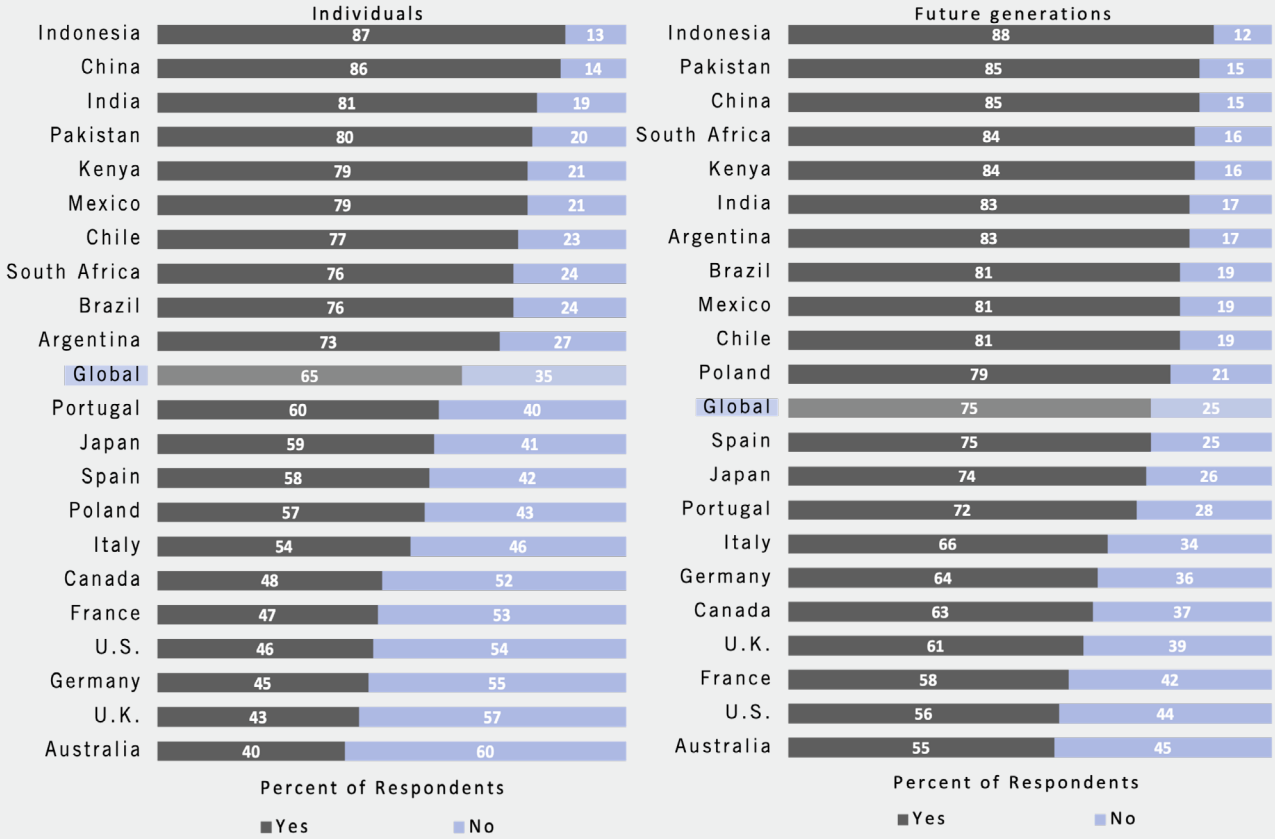
Most people think ChatGPT and technologies like it will help them and future generations in their jobs (65% and 75%, respectively).

This optimism is lower in certain countries: less than 50% of respondents from Australia, Canada, France, Germany, the United Kingdom and the United States of America believe it will help them in their jobs. On the other hand, more than 80% of respondents in China, India, Indonesia and Pakistan think it will help them.

There is a similar but less pronounced trend in beliefs about the work of future generations. In the same less-optimistic countries, between 55% and 64% respondents feel ChatGPT will eventually be useful, while in more optimistic countries, it is between 83% and 85%.

5.12 Work assistance from ChatGPT (%)

Do you think ChatGPT or technologies like it will help you in your job within the next 10 years? Will it help future generations in their jobs?



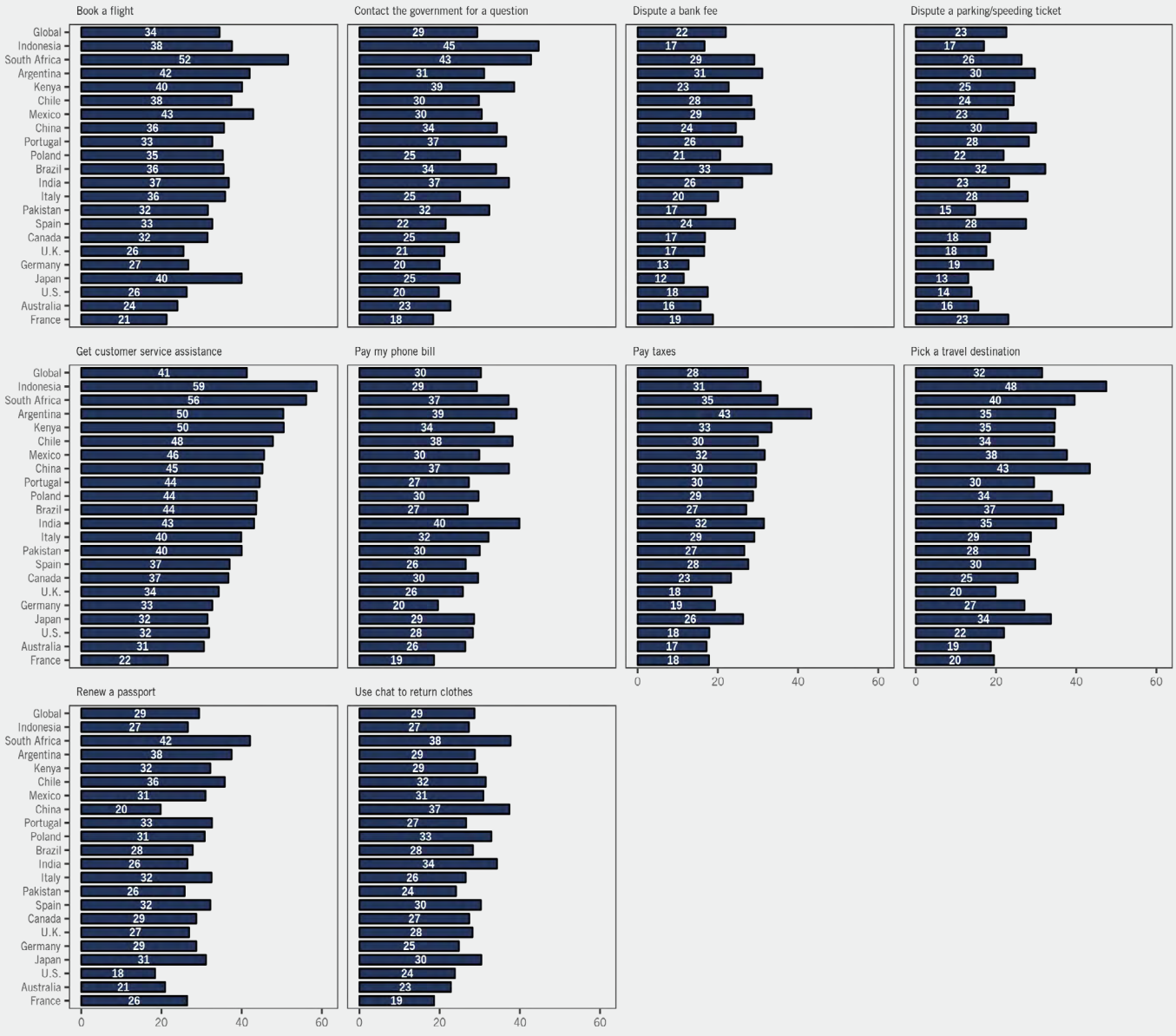
WILLINGNESS TO INTERACT WITH CHATBOTS

Respondents were asked whether, from a list of potential tasks, they would be willing to interact with a chatbot (Figure 5.13). Most people are not willing to engage with a chatbot, with unwillingness ranging from 59% and 78% depending on the task. The most popular chatbot task is customer service assistance (41%), whereas respondents are the least willing to use chatbots to dispute a bank fee (22%) or a parking or speeding ticket (23%).

Argentinians, Indonesians and South Africans demonstrate higher willingness than other countries to use chatbots fairly consistently across applications, commonly landing among the top three most willing countries. For example, 42% of Argentinians are willing to use chatbots to book a flight and 43% to pay taxes.

While Indonesians are comparatively in favour of using a chatbot in certain situations, like getting customer service assistance (59%) and picking a travel destination (48%), they are decidedly less interested in using it to dispute a parking or speeding ticket (17%) or bank fees (17%).

Chat technologies, like ChatGPT, are increasingly used. Imagine a company or government website offered a chatbot you could use to do a task. For which of the following activities would you be willing to interact with a chatbot?



VI. Deepfakes

Deepfakes, combining the words deep learning and fake, are fabricated content that convincingly depict non-existent actions or words. They use neural networks to analyse vast amounts of data to produce videos, images or audio clips that mimic a person's expressions, gestures and speech. These hyper-realistic synthetic media can be generated from nothing or by replacing a person in an image or video with the likeness of another individual.

This technology has been used in multiple industries, including film, education, digital communication, gaming, entertainment, social media, healthcare, material science, fashion and ecommerce. Governments are also exploring this technology as a component of their online tactics to, for example, undermine and disrupt extremist groups or establish communication with specific individuals.

But, by potentially spreading political propaganda and disrupting election campaigns, deepfakes represent significant threats to democracy and national security. They blur the line between reality and falsehoods, exacerbating a decline in trust in institutions and news media. They can harm reputations and present a particular risk for girls and women who are disproportionately the victims of sexualized deepfakes without consent.

There is a lot of fake news, where politicians tell lies with their voice, but this is only material created by AI.

— Respondent (Poland)

[Mnóstwo fakenewsów, gdzie polityk mówi kłamstwa swoim głosem, ale jest to tylko materiał stworzony przez AI]

Awareness of deepfakes

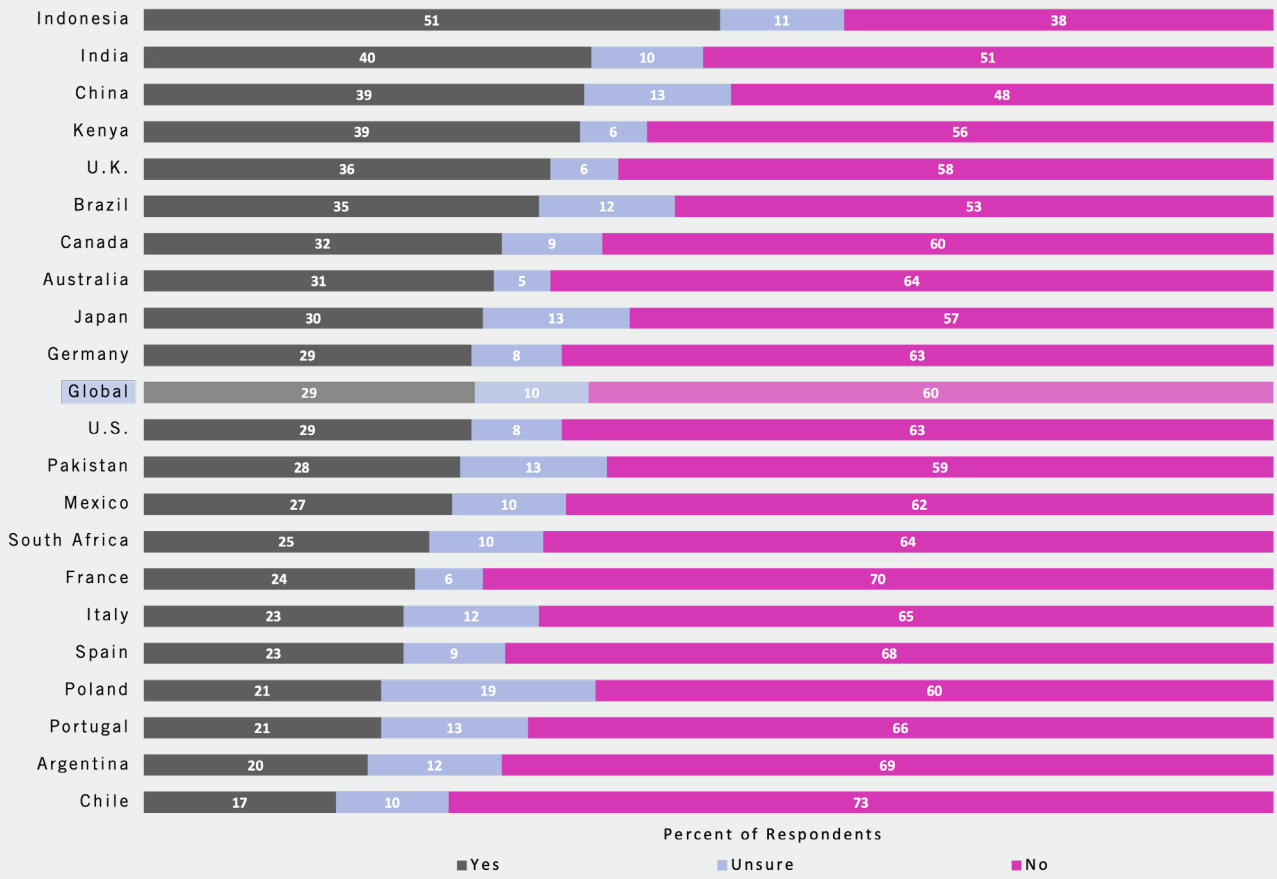
There is relatively low global awareness of deepfakes: less than a third of respondents (29%) have heard of them.

Awareness is fairly consistent across countries; in all but one—Indonesia—the majority of respondents have not heard of deepfakes. Significantly more Indonesians have heard of them (51%) than the next most familiar country, India (40%), or the global average.

The lowest level of awareness is in Chile (17%), followed by Argentina (20%), Poland (21%), Portugal (21%) and Spain (23%).

6.1 Deepfake awareness (%)

Have you heard of deepfakes?



Concern about deepfakes

When provided with a definition of deepfakes–that is, realistic-looking images, audio and videos produced with artificial intelligence that portray someone doing or saying something that never actually happened–half of respondents (51%) are very concerned about their use to deceive and mislead people. Only 4% are not concerned at all.

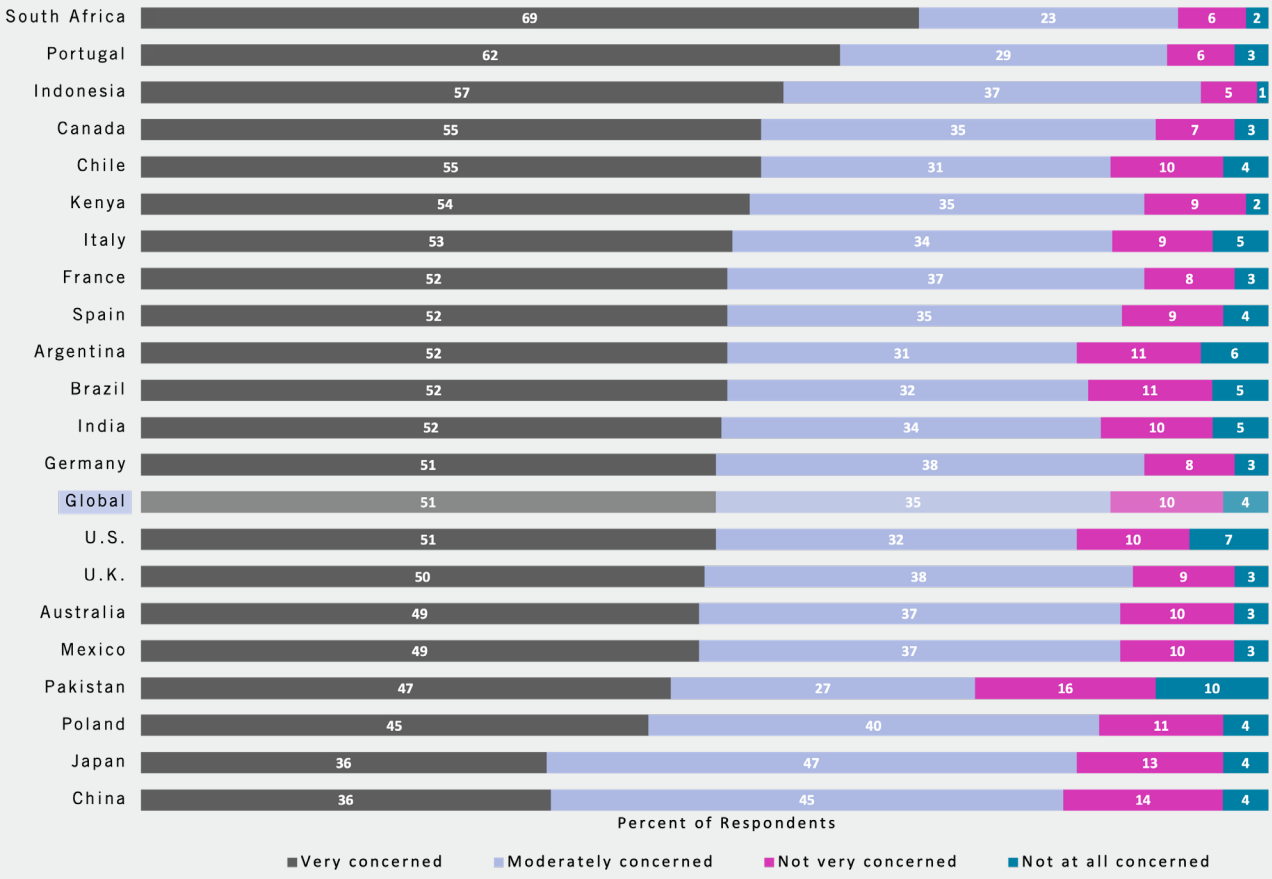
Despite relative consistency across countries, there are some outliers. Despite lower than average awareness of deepfakes, South Africa and Portugal are the most concerned, with 69% and 62% of people indicating they are very concerned, respectively. Indonesians are also very concerned with a combined 94% either moderately or very concerned.

In China and Japan, fewer people are very concerned (36% in both countries compared to the global average of 51%) and both have high levels of moderate concern (45% and 47%, respectively).

People from Pakistan are most likely to be unconcerned: 26% indicate they are not at all or not very concerned about deepfakes being used to deceive or mislead.

6.2 Concern about deepfakes (%)

How concerned are you that some groups or people are using deepfakes to deceive or mislead other people?



Detecting deepfakes on social media

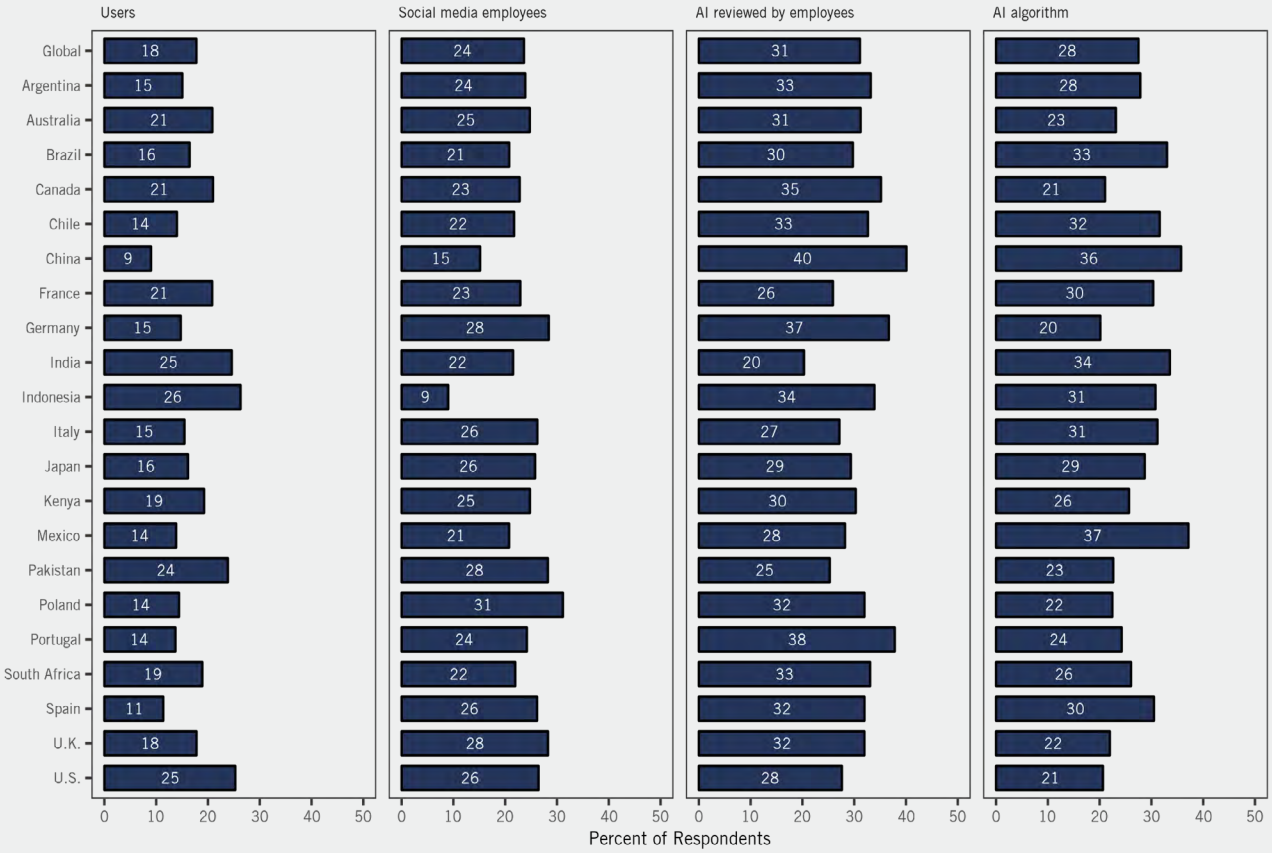
Respondents do not trust users to detect deepfakes on social media—only 18% of global respondents indicate that users are best placed to do this. The two most preferred detection methods both involve AI: AI reviewed by employees (31%) and AI algorithms (28%). There is thus a slight preference for these methods (59%) over those with human detection (42%).

In China, respondents believe AI reviewed by employees (40%) and AI algorithms (36%) are best suited to detect deepfakes. Chinese respondents are also the least likely to believe users are best-placed to detect deepfakes (9%).

Respondents from Indonesia (26%), the United States of America (25%), India (25%) and Pakistan (24%) are most supportive of user-based deepfake detection. Indonesian respondents also demonstrate the least support—by a significant amount—for social media employees detecting deepfakes (9%).

6.3 Best actors for detecting deepfakes (%)

When it comes to detecting deepfakes on social media, in your opinion, who is best placed to do so?



Detecting and countering deepfakes

Respondents were asked to select from a list of organizations which they think are best suited to detect and counter deepfakes. Globally, the most trusted organizations are technology companies (selected by 42% of respondents), followed by the government (30%).

International organizations, non-profits and public-private partnerships are the least trusted (only selected by 20%, 12% and 18% of respondents, respectively).

The government elicits high levels of trust in China, India, Indonesia and Kenya, with over 40% support. Indonesians express the greatest overall trust in the government (63%) and government-appointed independent regulators (45%).

Less than 20% of respondents in Poland, Japan and Germany trust the government to detect and counter deepfakes.

Overall, technology companies are less trusted to detect and counter deepfakes in North America and Europe, with most response rates below 40%. In comparison, technology companies are most trusted to carry out this function in South Africa and Indonesia (63% and 60%, respectively).

Which of the following actors do you trust to detect and counter deepfakes?

Regulating deepfakes

There is little global consensus about who is best suited to regulate deepfakes (Figure 6.5). The government is most commonly seen as a good option (38%) but is closely followed by technology companies (37%) and government-appointed independent regulators (27%). Non-profit organizations are the least likely to be seen as good regulators of deepfakes (11%).

Respondents were given the option to choose as many potential regulators as they liked; Indonesians were the most willing to identify actors they felt could regulate. A majority indicate they think their government is well placed to regulate deepfakes (64%); more than 15% higher than the next country, Kenya (46%). Indonesians and South Africans are also the most likely to favour technology companies (55% for both countries).

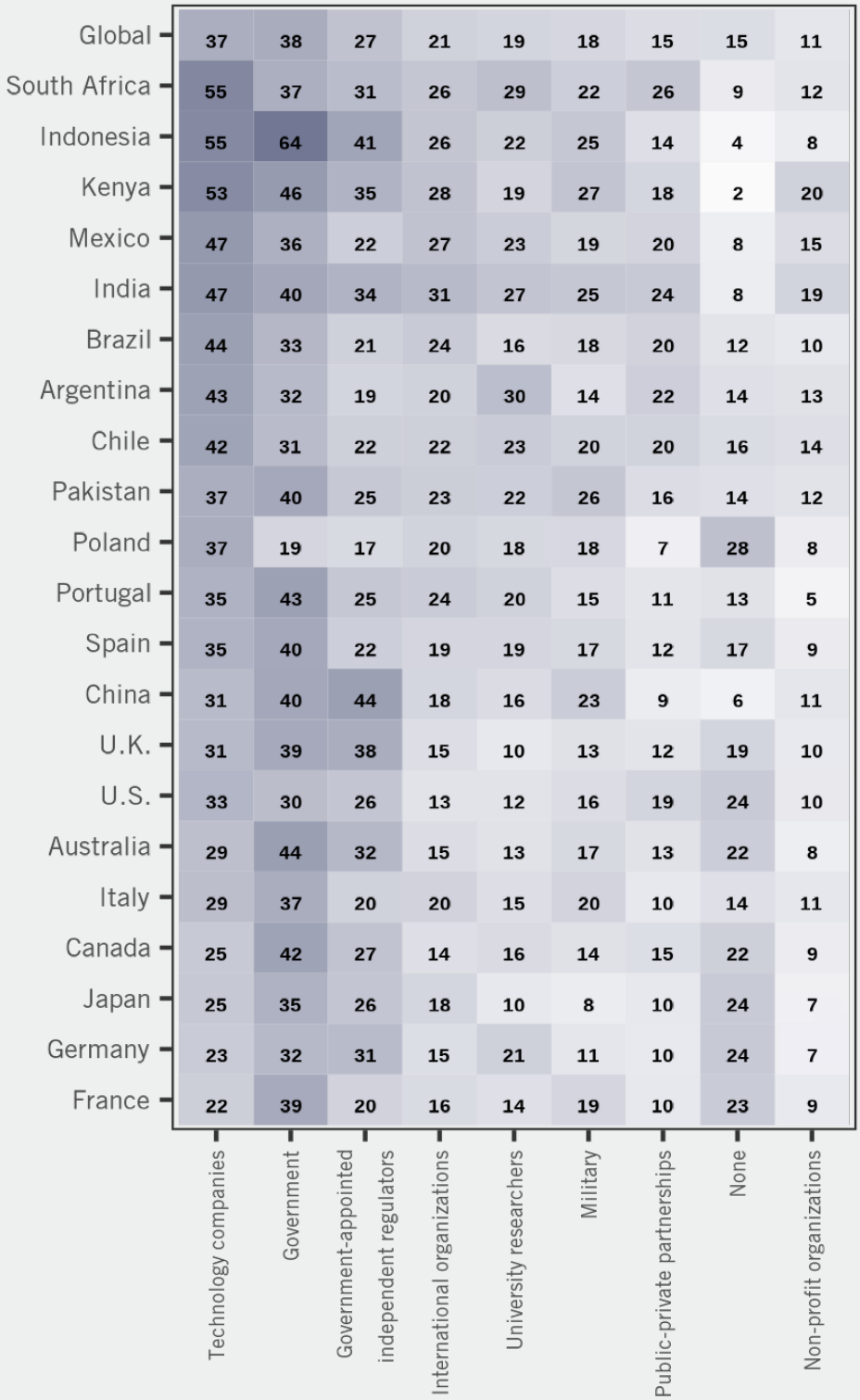
Respondents from Poland are the least likely to think any of the options are good regulators. The only option chosen by more than a third of the Polish respondents is technology companies (37%), and they are the most likely to indicate none of the options are suitable (28% compared to a global average of 15%).

You can imitate voices that can also be used for criminal things.

— Respondent (Germany)

[sie kann Stimmen nachmachen die man auch für kriminelle Sachen verwenden kann]

Which of the following actors is best placed to regulate the use of deepfakes?



VII. Self-Driving Transportation

Self-driving vehicles have long been a goal of transportation industry players. Technologies for automating parts of the driving process, such as modern cruise control, have been in development for decades. However, progress on AI and neural networks has dramatically increased the speed and scale of these advances.

Fully autonomous vehicles could be transformative. They could increase efficiency, reduce environmental impacts and enhance road safety.

Some level of automation has been integrated into commercially available vehicles, such as parking assistance and lane assist. Autonomous vehicles are also used for certain dedicated tasks in industries like mining. However, there remain technical, social, legal and ethical barriers to the widespread adoption of these technologies.

I can think of cars that do the same tasks as men and I don't like that at all because cars don't have common sense and therefore can make mistakes.

— Respondent (Italy)

[Mi vengono in mente delle macchine che fanno gli stessi compiti degli uomini e non mi piace per niente perché le macchine non hanno buon senso e quindi possono sbagliare]

Public availability of autonomous vehicle applications

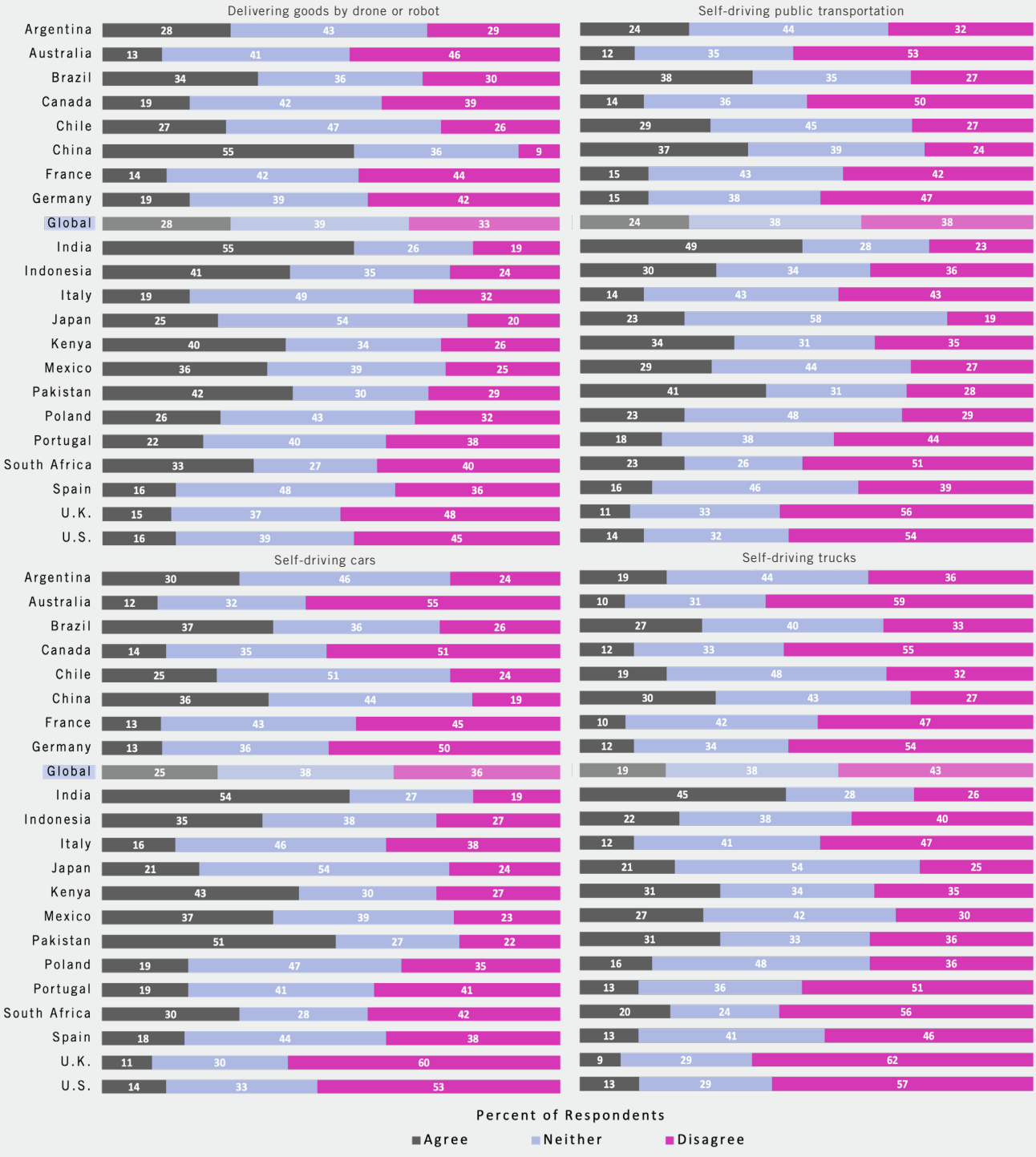
Respondents were asked whether they thought different autonomous vehicle applications should be made publicly available (Figure 7.1). Overall, people are not strongly in favour of any of the proposed options. For each application, nearly three-quarters of global respondents are either unsure about or disagree with about making them available. The most accepted uses are, in descending order: delivery drones or robots (28%), self-driving cars (25%), self-driving public transportation (24%) and self-driving trucks (19%).

The strongest support is from respondents in China and India for delivery drones or robots (about 55% of each country agree with these being publicly available). But whereas at least a near majority of respondents in India support each of the other proposed applications, those in China are much less supportive of the other options (with between 30% and 37% in agreement). Pakistan, on the other hand, is significantly more supportive of self-driving cars than any of the other options.

The strongest opposition is from respondents in the United Kingdom. They disagree more with making self-driving trucks available than any other country to any other application (62%). They also showed the most disagreement for each of the other proposed uses.

7.1 Technologies that should be made available to the public (%)

How much you personally agree that the following technologies should be made available to the public.



Trust in self-driving cars

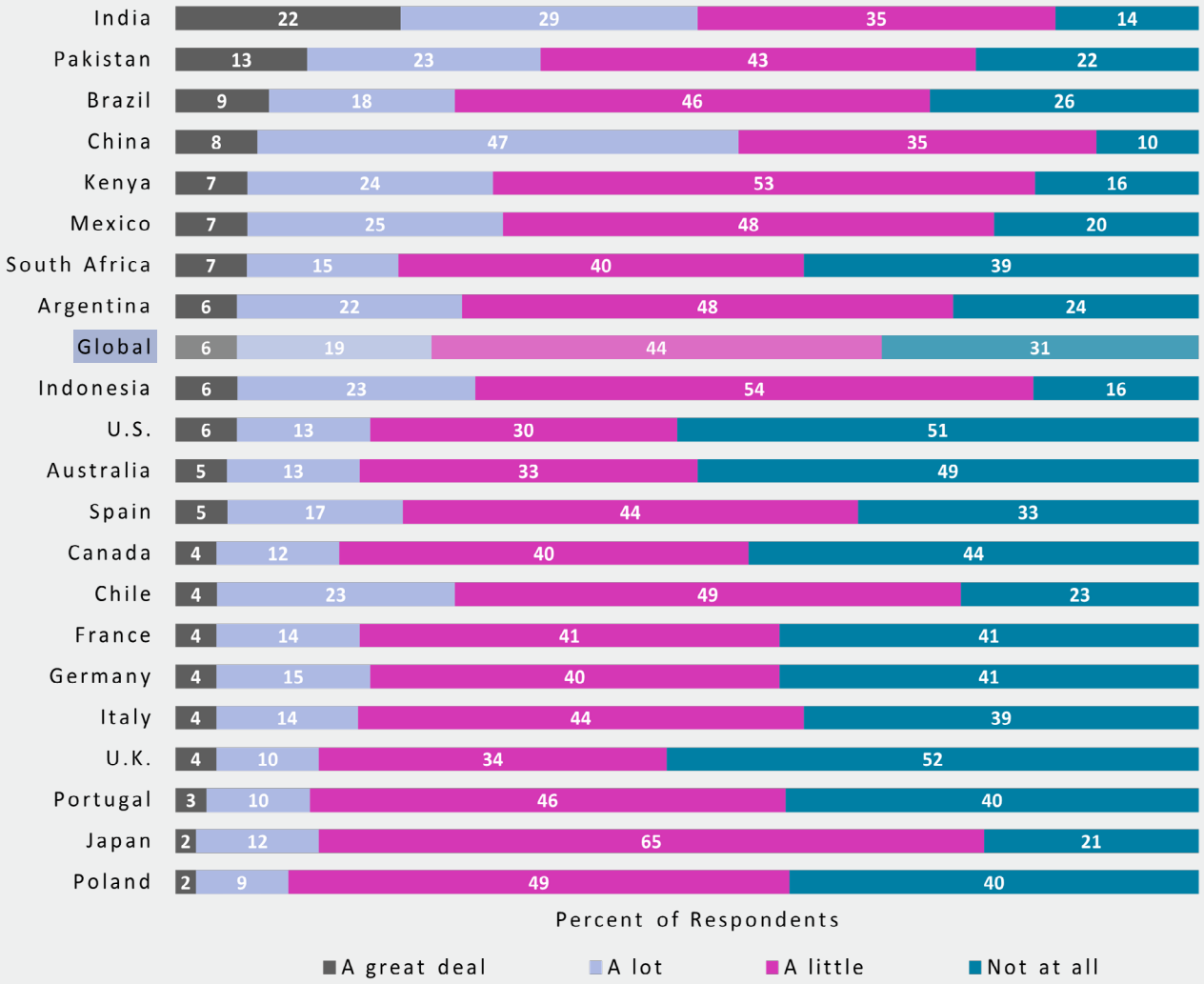
Three-quarters of respondents have little or no trust in self-driving cars on the streets or highways where they live. With the exception of India and Pakistan, fewer than 10% of each country surveyed—and a global average of 6%—indicate a great deal of trust in having them on roads.

Respondents in China and India are significantly more trusting of self-driving cars than the global mean. In both cases, more than half of respondents indicate that they trust self-driving cars a lot or a great deal. Only 36% of respondents in the next most trusting country—Pakistan—indicate they trust them a lot or a great deal.

While more than half of the respondents in the United States and the United Kingdom do not trust self-driving cars at all, Poland is the least trusting country, with almost 90% of respondents trusting them a little or not at all.

7.2 Trust in self-driving cars (%)

How much would you trust self-driving cars on the streets and highways in your city or town?



Autonomous public transit

Globally, respondents do not demonstrate particularly strong levels of interest in using self-driving public transportation (Figure 7.3). Of three modes of self-driving public transportation—buses, taxis and trains--only for trains were respondents more likely than unlikely to indicate they would use it.

Globally, respondents are slightly opposed to using self-driving buses or taxis; 40% or 44% compared to 36% or 33% of those who are in favour, respectively. Fewer than a quarter of respondents are undecided about using any of these options.

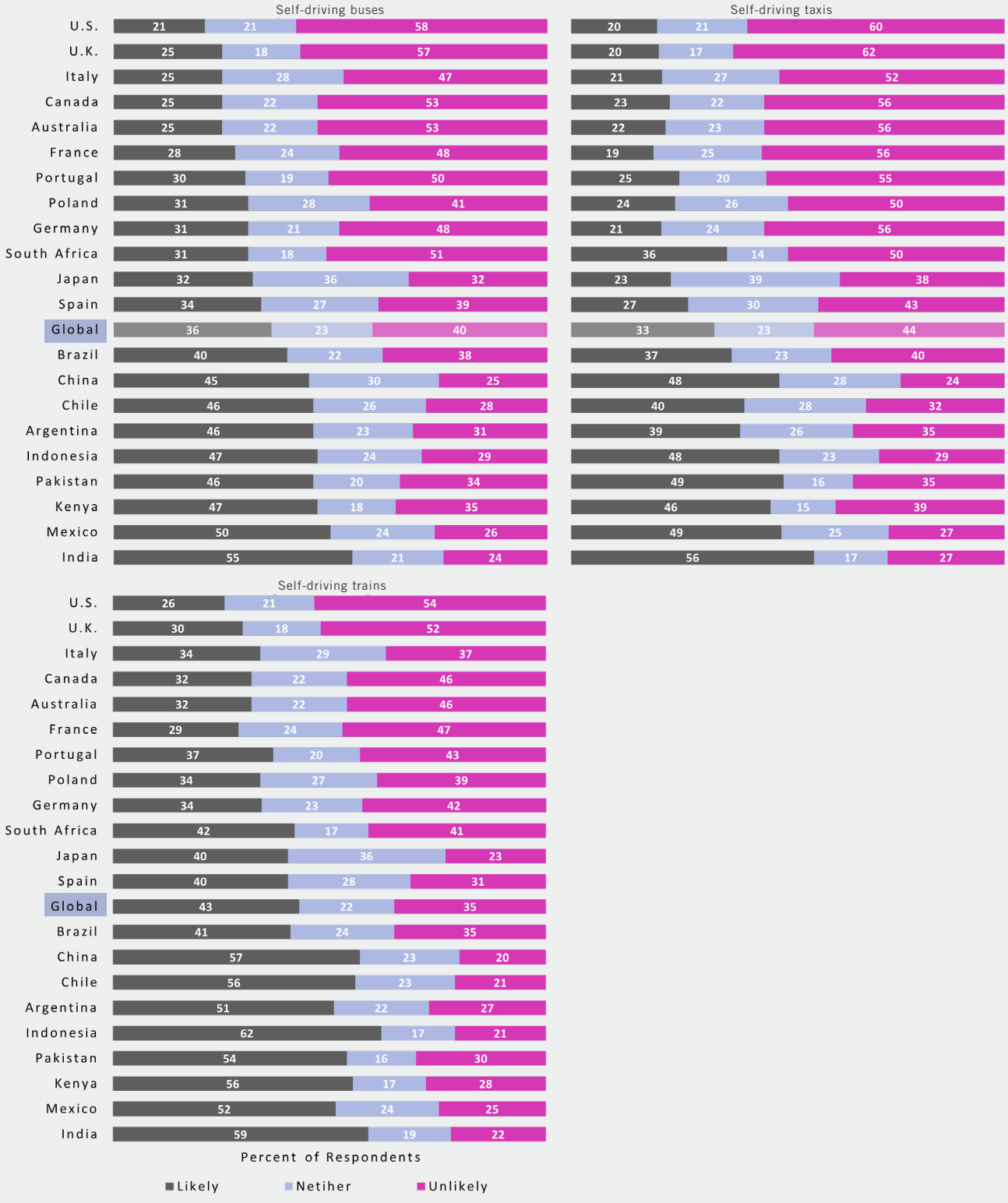
Respondents in North America and Europe are less likely to use self-driving public transportation. Australia, Canada, France, Germany, Poland, Portugal, the United Kingdom and the United States of America consistently express the highest percentages (largely >50%) of unwillingness to use self-driving public transit across all three types. The one exception being Italians being slightly less opposed to self-driving cars (37%). South Africans mirror these trends.

Among North Americans, Mexicans are particularly amenable to self-driving public transit. About half of respondents in Mexico are likely to use each of the proposed forms of transport.

When I think of artificial intelligence (AI), I envision advanced computer systems and algorithms capable of learning and problem-solving without human intervention. AI applications range from autonomous robots and self-driving cars to virtual assistants and deep learning models. While AI presents exciting opportunities for automation and innovation, it also raises ethical and societal questions regarding its responsible use and impact on the job market.

— Respondent (Kenya)

Imagine they were available in your city, how likely would you be to take the following self-driving public transportations?



VIII. AI and Consumer Behaviour

AI has been integrated into a wide range of consumer products and services. For example, it can create responsive and human-sounding digital assistants or chatbots for online shoppers. It can also personalize consumers' experiences online, from online shopping guidance like Amazon Personalize to dating sites with potential matches defined by algorithms.

AI can also blur the line between human interaction and marketing. Virtual influencers (computer-generated avatars) can post and share content on behalf of companies. Marketers have also used algorithms to create and post large quantities of fake product reviews that pass for real ones.

Regulatory agencies are also now responding to concerns about consumer applications, including issues of privacy and the replication of existing biases.

Therefore, trust looms large in the relationships among consumers, companies and their products. While humans are open to engaging with algorithms in some contexts, there are situations in which they are not.

Clothing

Respondents were asked whether they would trust AI to choose their clothes (Figure 8.1). Overall, they are hesitant. Only 18% of global respondents express a lot or a great deal of trust in having their clothes chosen by AI, and 51% indicate they have little or no trust in it.

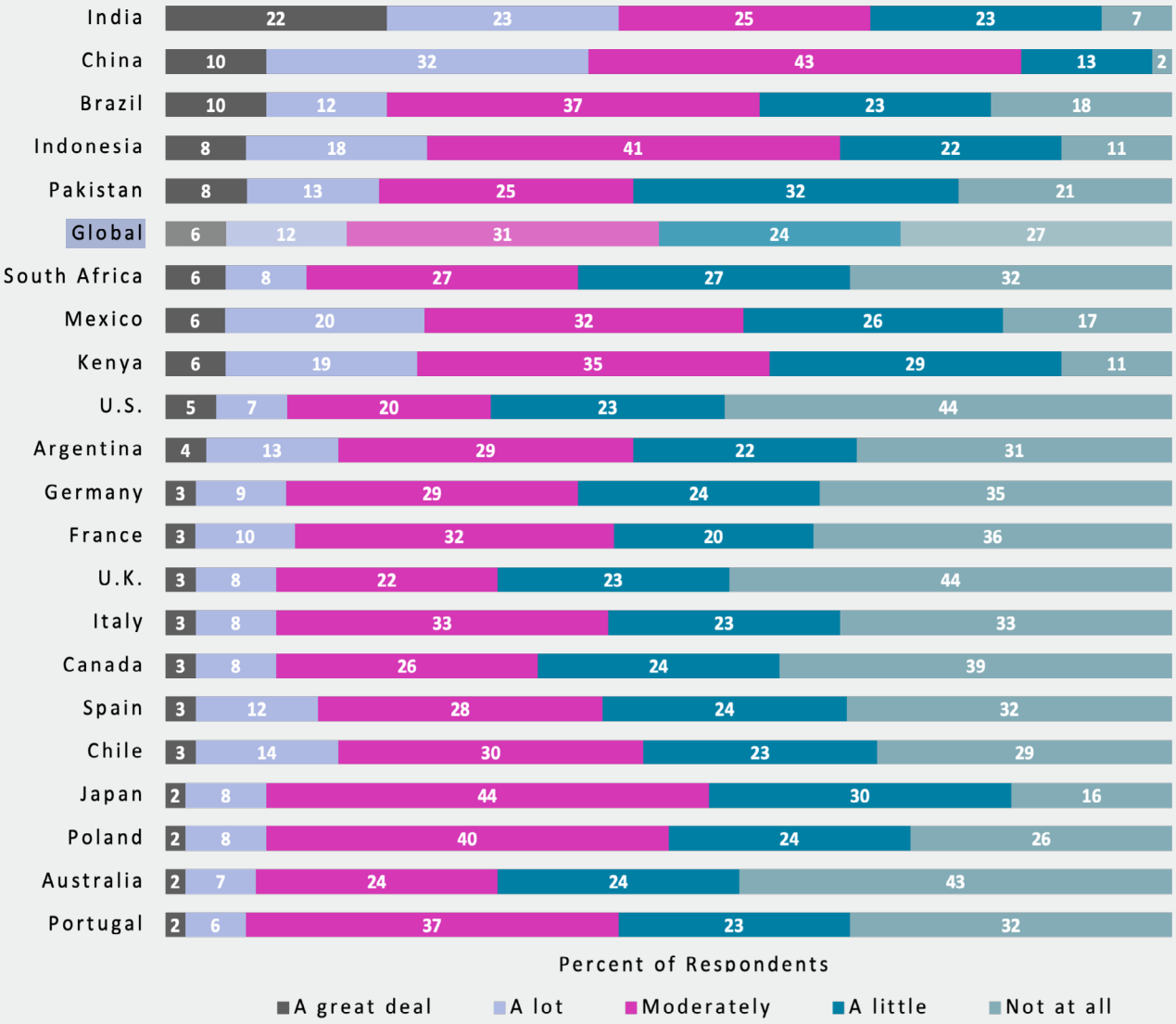
Respondents in India and China are the most willing to trust an algorithm to choose their clothes (70% and 85%, respectively). Australia, the United Kingdom, Canada and the United States display the lowest trust levels (35% or less).

Respondents were then asked to imagine an AI algorithm that could select clothes for them when they shopped based on their preferences (Figure 8.2). Respondents are divided but, in general, more positive about this application. Just over a third of global respondents (39%) indicate that they are likely to use this technology. Another third (35%) are unlikely to use it, and the remaining 26% are neither likely nor unlikely to use such an application.

China stands out again, with only 8% of respondents indicating they are unlikely to use this service and 65% indicating they are likely to do so. India and Indonesia also express high likeliness of use (67% and 66%, respectively).

8.1 Trust in AI choosing clothes (%)

How much do you trust an AI algorithm to choose your clothes?

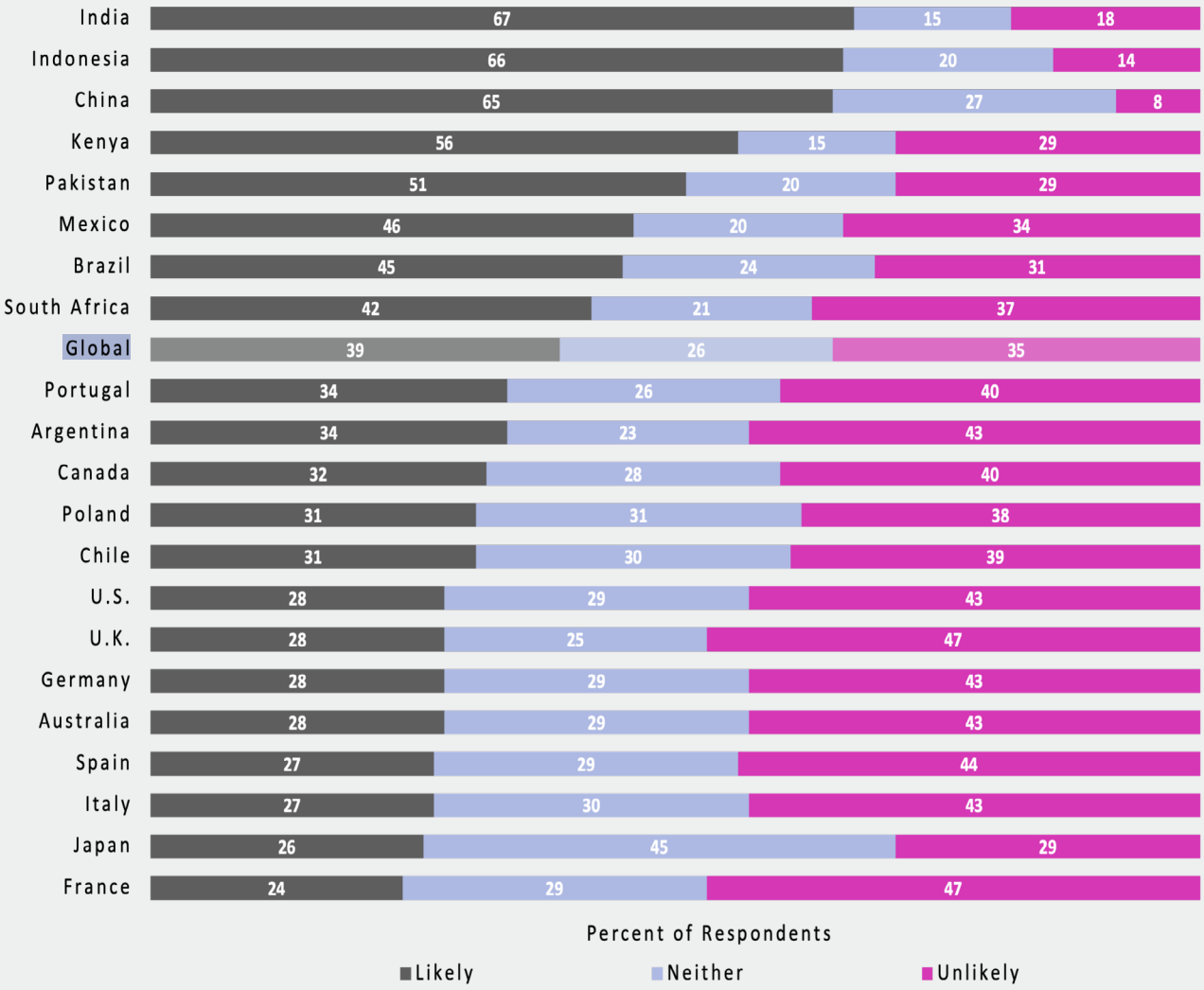


Fluctuating fees for a Frosty?

Surge pricing, in which the price of a good or service fluctuates based on a combination of factors including supply and demand, is commonly and often negatively associated with Uber. But so-called dynamic pricing is hardly limited to transportation. In a February 2024 earnings call, Wendy's CEO Kirk Tanner announced plans to introduce AI-driven surge pricing to their menus in 2025. The fast-food chain intends to roll out digital menu boards in its restaurants that will allow the price of items to be changed over the course of a single day. It might soon be a good time to have your Frosty in February.

8.2 Selecting clothes based on shopping preferences (%)

Imagine that an AI algorithm was developed to select clothes for you based on your preferences when you go shopping. How likely are you to use such an AI algorithm if it was available?



Travel

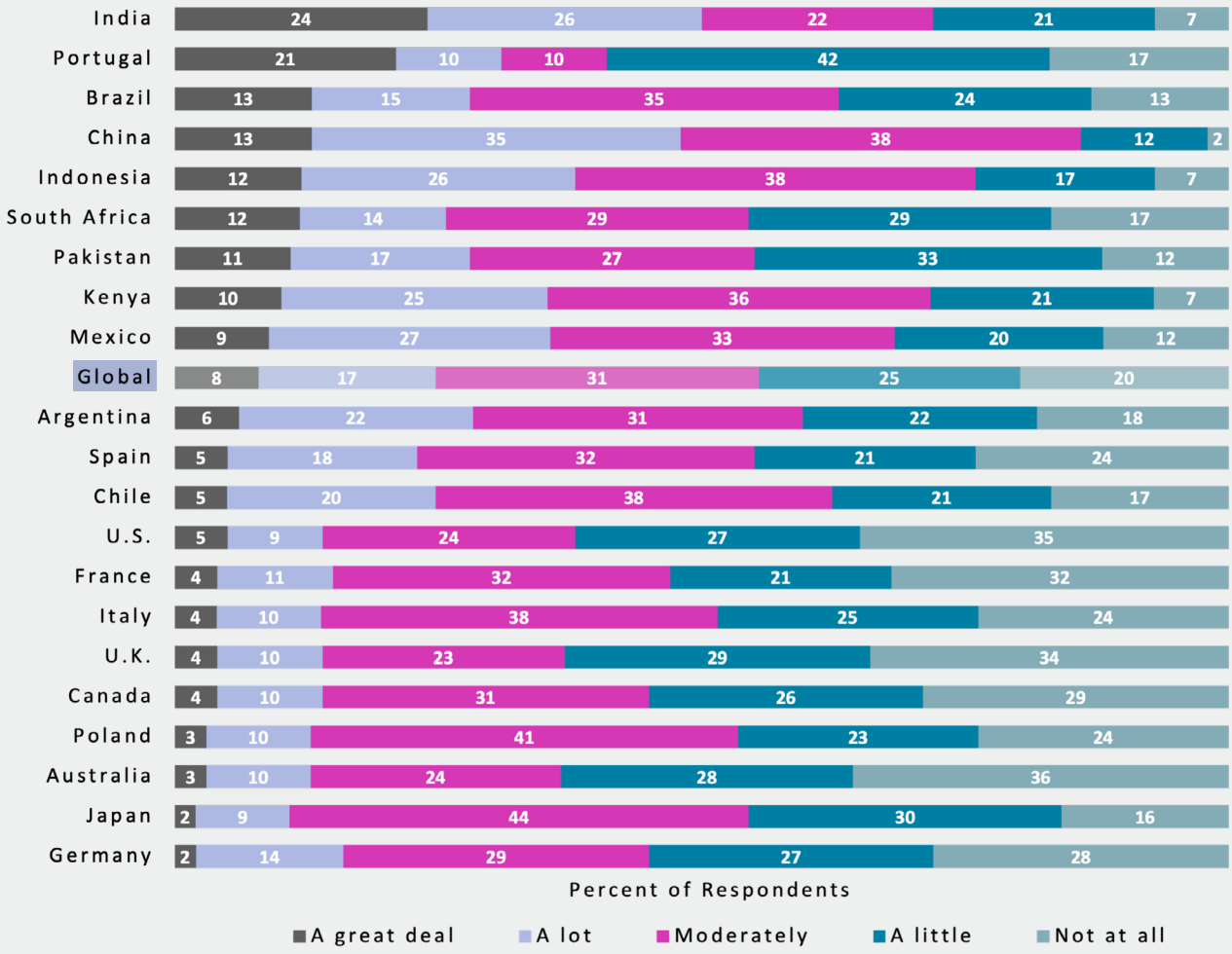
Respondents were asked about using an algorithm to recommend a vacation location as well as to set a vacation itinerary based on their preferences and previous travel.

Globally, most respondents (56%) trust AI to recommend a vacation location. A large majority of Chinese (87%), Indonesian (76%), Indian (72%) and Kenyan (71%) respondents trust the idea.

However, there are significant variations in levels of distrust reported. While only 2% of Chinese respondents do not trust AI at all to recommend a vacation location, more than a third of those from Australia, the United Kingdom and the United States of America do not trust it at all.

8.3 Trust in AI to recommend vacation locations (%)

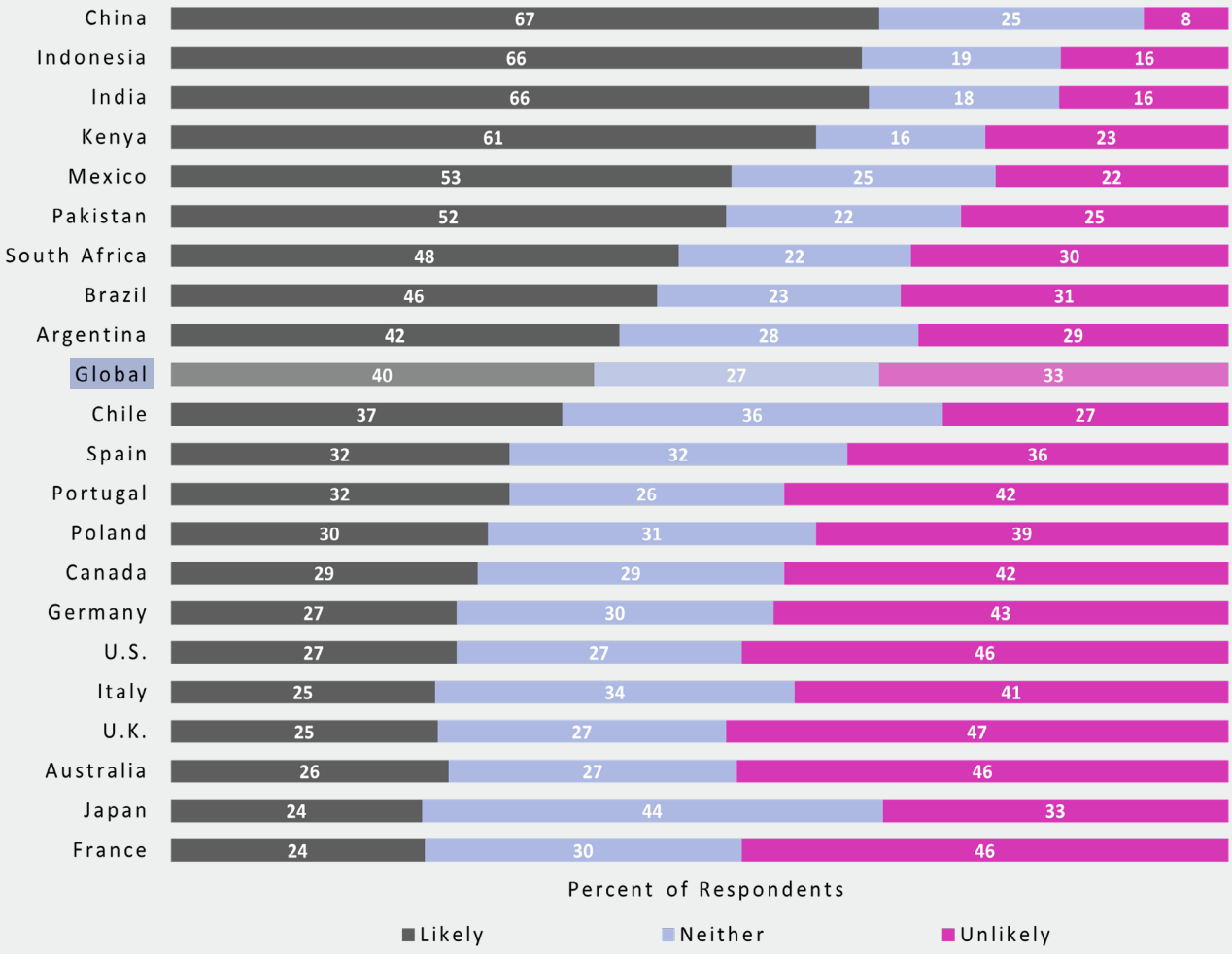
How much do you trust an AI algorithm in recommending vacation locations?



A slightly smaller proportion of global respondents indicate they are likely to use AI to plan a vacation (40%). As with AI recommending a vacation location, those in China, India, Indonesia and Kenya are most likely to use such an application; at least 60% of respondents in each are in favour. Those in Australia, Canada, France, Germany, Italy, Portugal, the United Kingdom and the United States of America feel the opposite. More than 40% in each of those countries are unlikely to use AI to set a travel itinerary. Japan is the most undecided country, with 44% neither likely nor unlikely.

8.4 Using AI to plan vacations (%)

Imagine that an AI algorithm was developed to plan your vacations based on your preferences and previous travels. How likely are you to use such an algorithm?



Groceries

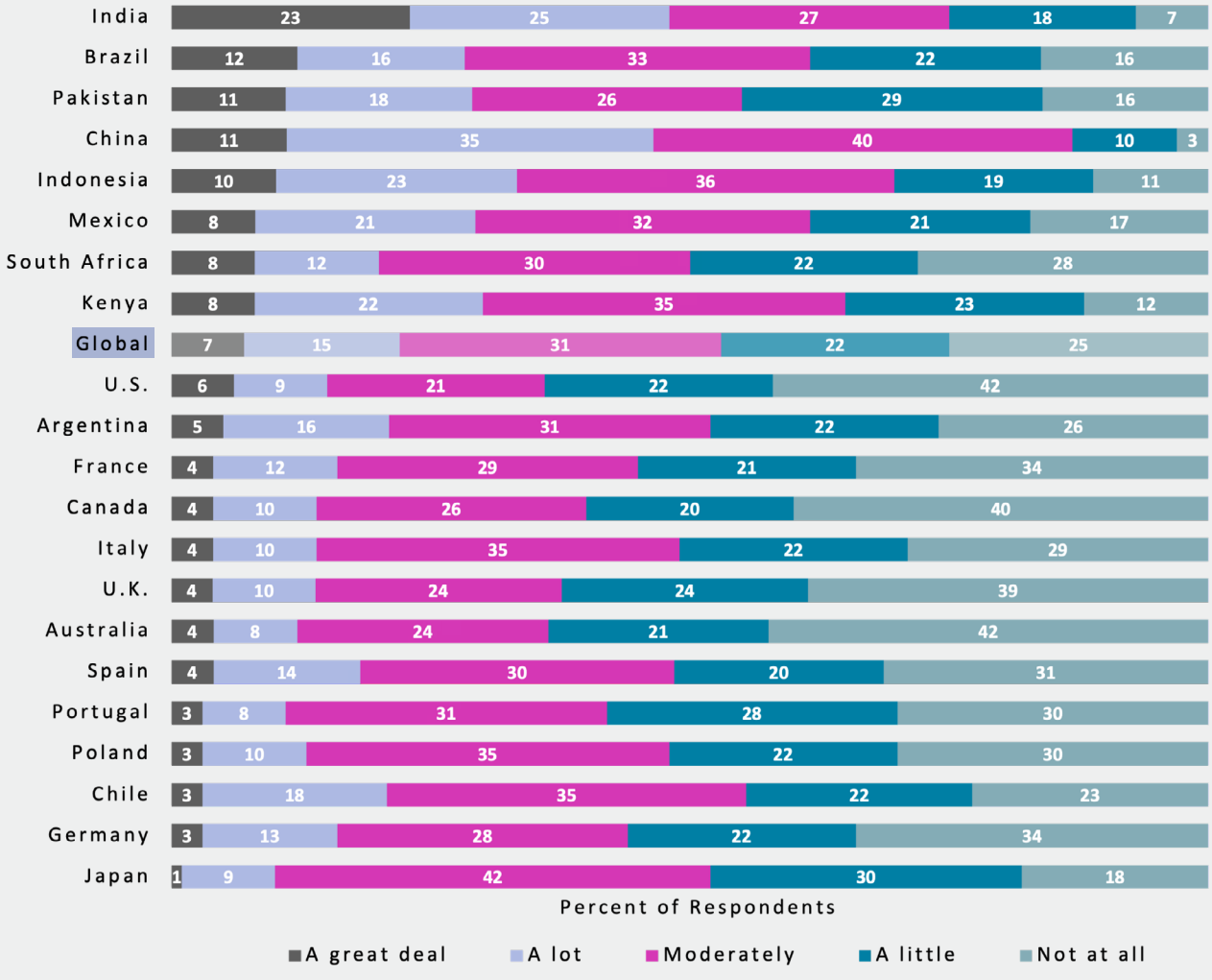
When asked whether they trust an algorithm to choose their groceries for them, respondents are fairly skeptical. Only 7% and 15% of global respondents trust AI a great deal or a lot, respectively, to perform this task.

There is some variation among countries: while almost a quarter of Indian respondents (23%) trust AI a great deal to choose their groceries, only 1% of those in Japan do. China, Indonesia, India, Brazil and Pakistan are the only countries in which over 10% of respondents indicate a great deal of trust.

Respondents in Australia, Canada and the United States of America are particularly mistrustful, with more than 40% of respondents indicating they do not trust AI with their groceries at all.

8.5 Trust in AI to choose groceries (%)

How much do you trust an AI algorithm to choose your groceries?

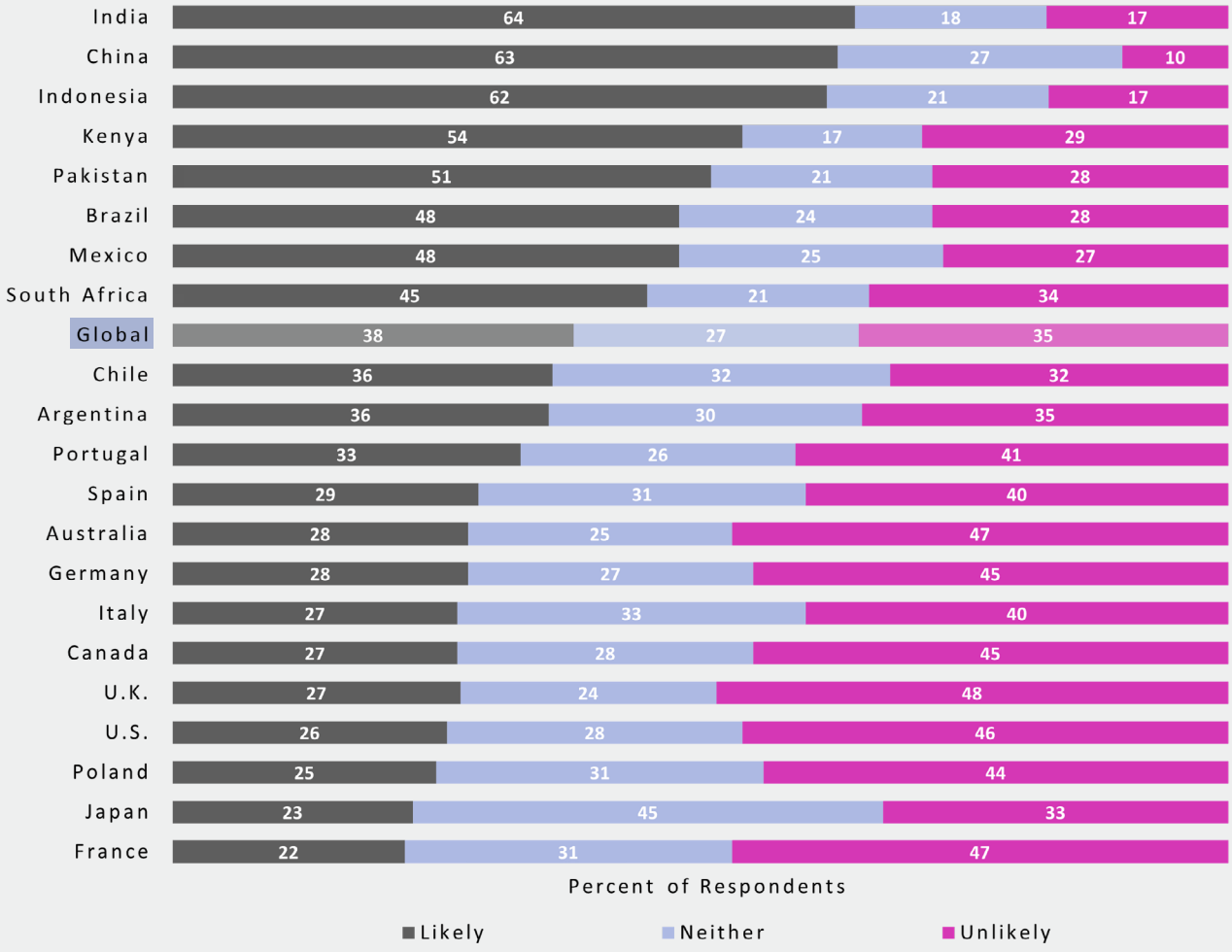


Despite this hesitancy to trust AI in choosing groceries outright, respondents are somewhat willing (38% likely, globally) to consider using an algorithm that chooses groceries based on their preferences. Those in India, China and Indonesia are the most willing to use AI in this way (64%, 63% and 62%, respectively).

Nearly half of respondents in Australia, Canada, France, the United Kingdom and the United States of America are unlikely to use a grocery-selecting AI. Japanese respondents are largely undecided (45% neither likely nor unlikely).

8.6 Use of AI to select groceries based on shopping preferences (%)

How likely are you to use an AI algorithm to select groceries for you based on your preferences when you go shopping?



Dating

Respondents who identified as single are not especially enthusiastic about AI helping with the search for a romantic partner. Only 25% of those who are single express a lot or a great deal of support for having an algorithm select a blind date, whereas 49% express little or no support.

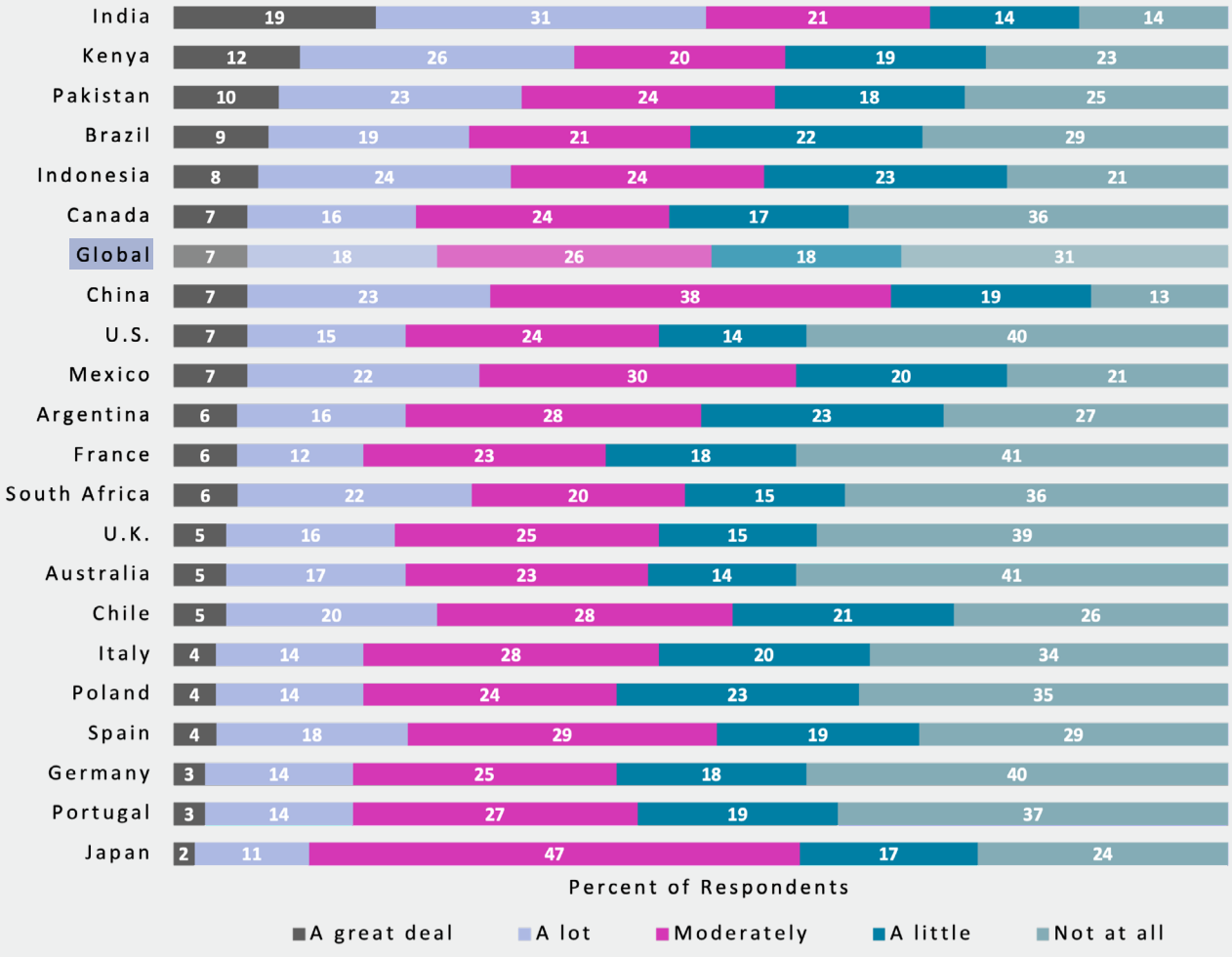
While people in China demonstrate support for many of the AI applications proposed in the survey, they are slightly more hesitant about using it to choose a blind date. Over a third moderately support this application (38%), and slightly fewer than a third support using it a little or not at all (32%).

Those in India, however, are the most likely to use AI to choose a date: 50% of respondents say they support using such an application a lot or a great deal.

German, French, Argentinian and Australian respondents are the least likely to use AI in this way; at least 40% of single respondents in these countries do not support an AI algorithm selecting a blind date partner for them.

8.7 Support for AI selecting a blind date partner (%)

Would you support an AI algorithm selecting a blind date partner for you?



Respondents are also unenthused at the idea of an algorithm choosing the best dating matches for them. Only 29% indicate that they are likely to use such an algorithm, while 43% are unlikely to do so.

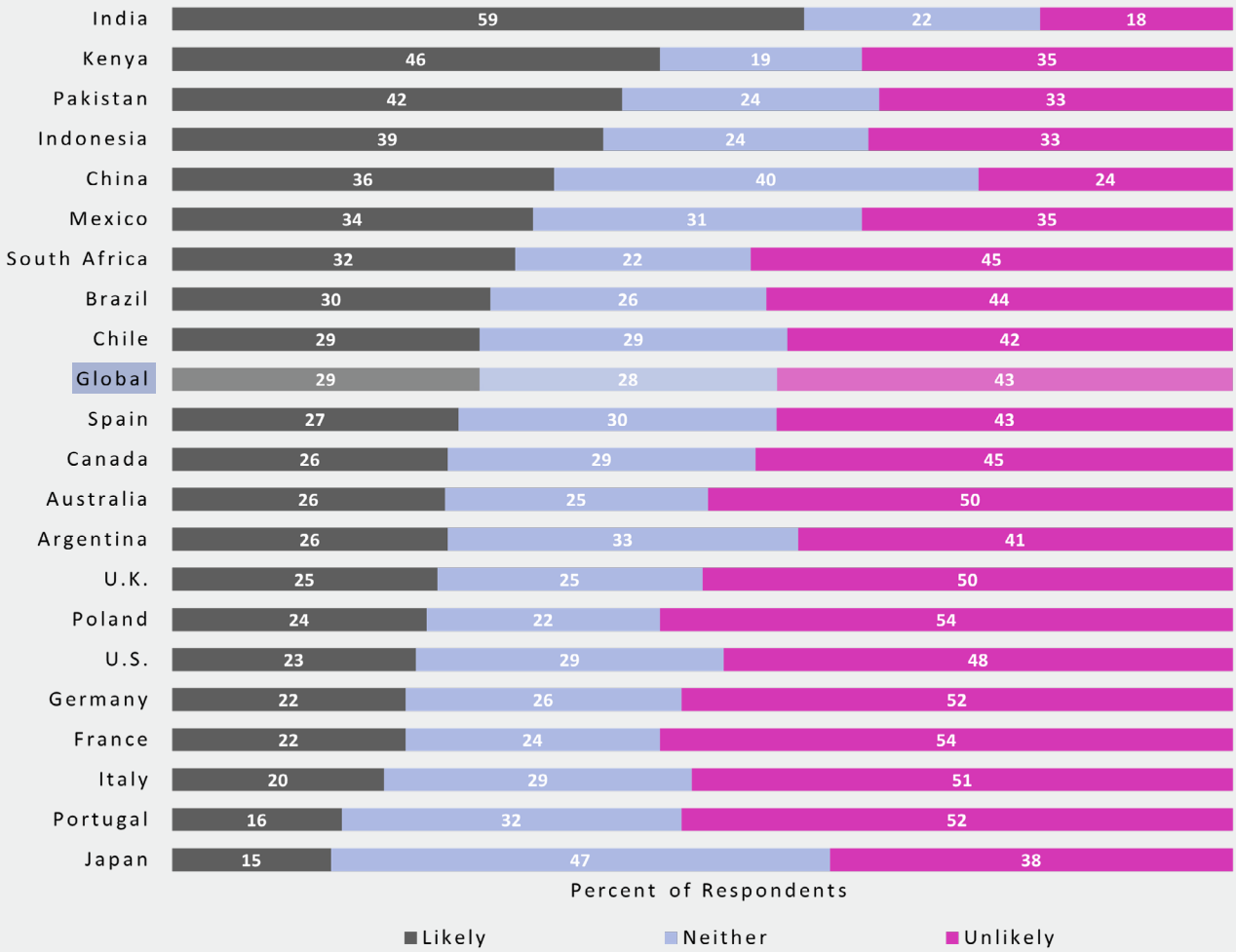
Chinese respondents again show more hesitancy with dating applications as compared to other AI applications. They are above the mean for likelihood of using such an application (36%), but the majority is either unsure (40%) or is unlikely to use it (24%).

India is again strongly in favour with a majority (59%) likely to use the algorithm.

France and Poland tie for the least likely to use this dating application (54% unlikely).

8.8 Use of AI to choose best dating matches (%)

Imagine an AI algorithm was created to choose the best dating matches for you. How likely are you to use such an algorithm?



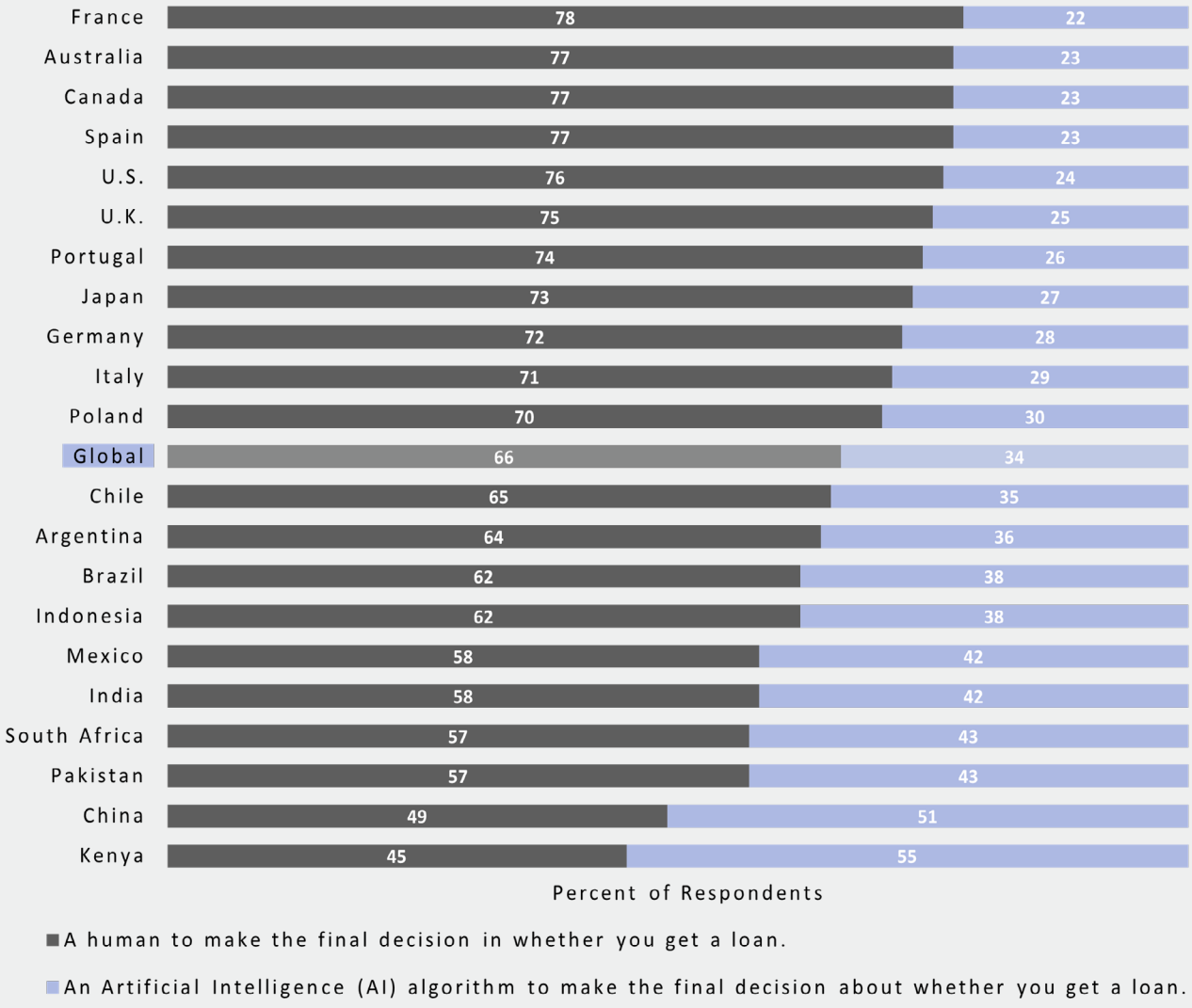
Finance

The majority (66%) of global respondents prefer to have a human rather than an algorithm make the final decision about whether they receive a loan. This general sentiment is fairly consistent across countries.

Kenya and China are notable outliers; the majority of respondents in both countries prefer to have an algorithm make the final loan decision (55% and 51%, respectively).

8.9 Preference for human or AI in loan decisions (%)

Which option do you prefer?



IX. AI and Healthcare

AI has been adopted extensively in the field of healthcare. It is currently used in numerous applications for diagnostics, drug discovery and patient experience. Potential future uses of AI in healthcare include improved imaging diagnostics, genome interpretation, patient monitoring, machine-assisted surgery and hospital logistics planning.

However, AI also presents significant risks and challenges for the healthcare sector. Health data privacy and protection are vital; the potential for over-collection, misuse and mishandling of data is a growing concern. Further, the incursion of technology into caregiving and highly skilled human work might blur accountability, with moral and legal implications.

[AI] will be an excellent help in the field of medicine.

— Respondent (Italy)

[Sarà un ottimo aiuto nel campo della medicina.]

Attitudes toward the use of AI in healthcare

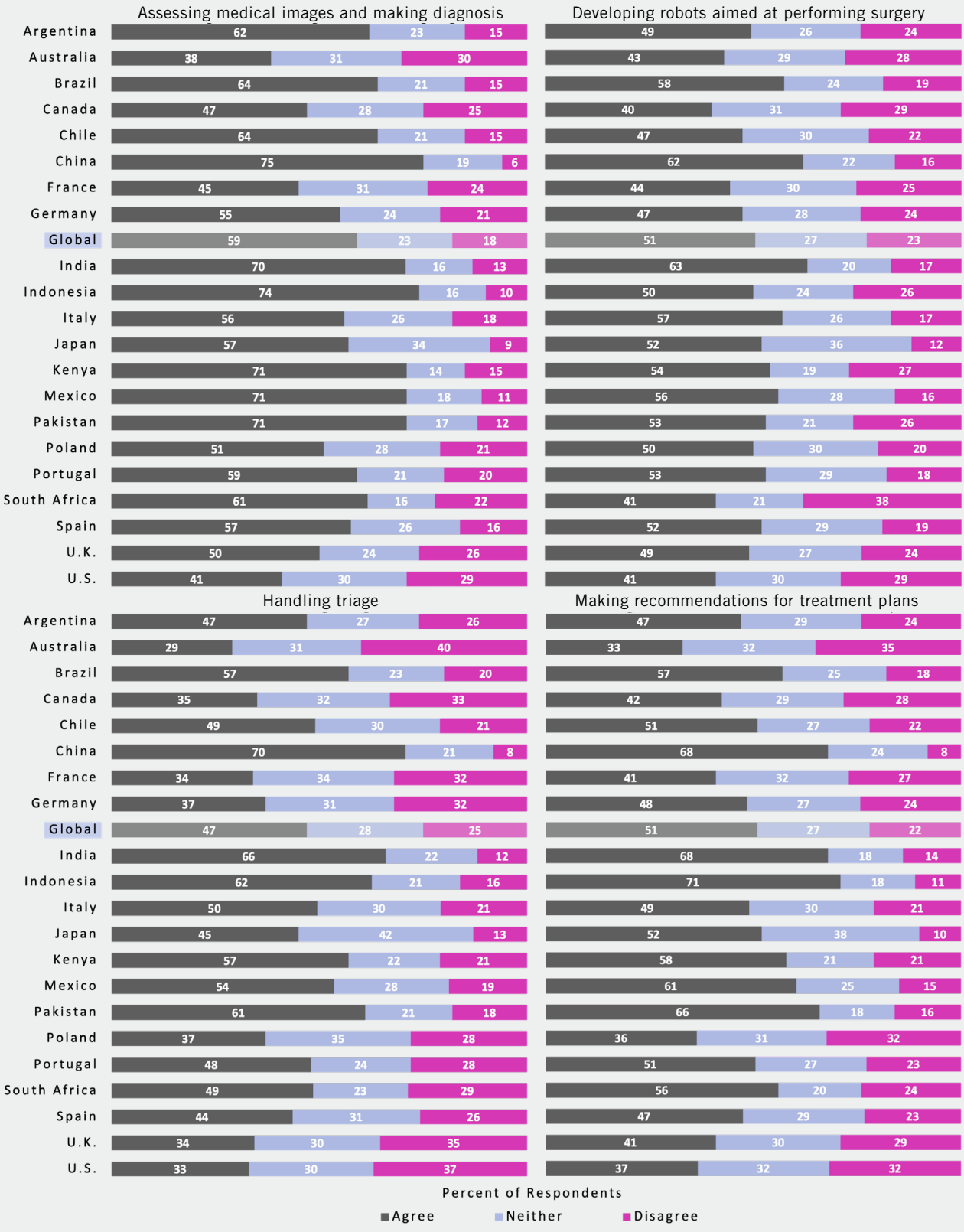
Globally, there is relatively high support for AI usage in healthcare (Figures 9.1-9.3). When asked about AI use for certain healthcare tasks, nearly half of respondents agree it should be used. Tasks include handling triage and developing robots aimed at providing services for the elderly. Among the nine potential uses presented, the greatest support is for the use of AI in diagnostic imaging (59%), while the least is for determining an individual health plan and for making prescriptions (both 46%).

Pharmaceutical tasks (dispensing medication and recommending over-the-counter medication) show lower levels of support than tasks otherwise completed by technicians, nurses or physicians (for example, making diagnoses and treatment plans). China and India are outliers in their high support for the handling and preparation of medication by AI (70% and 67%, respectively), but they still support the use of AI in these tasks less than other potential applications.

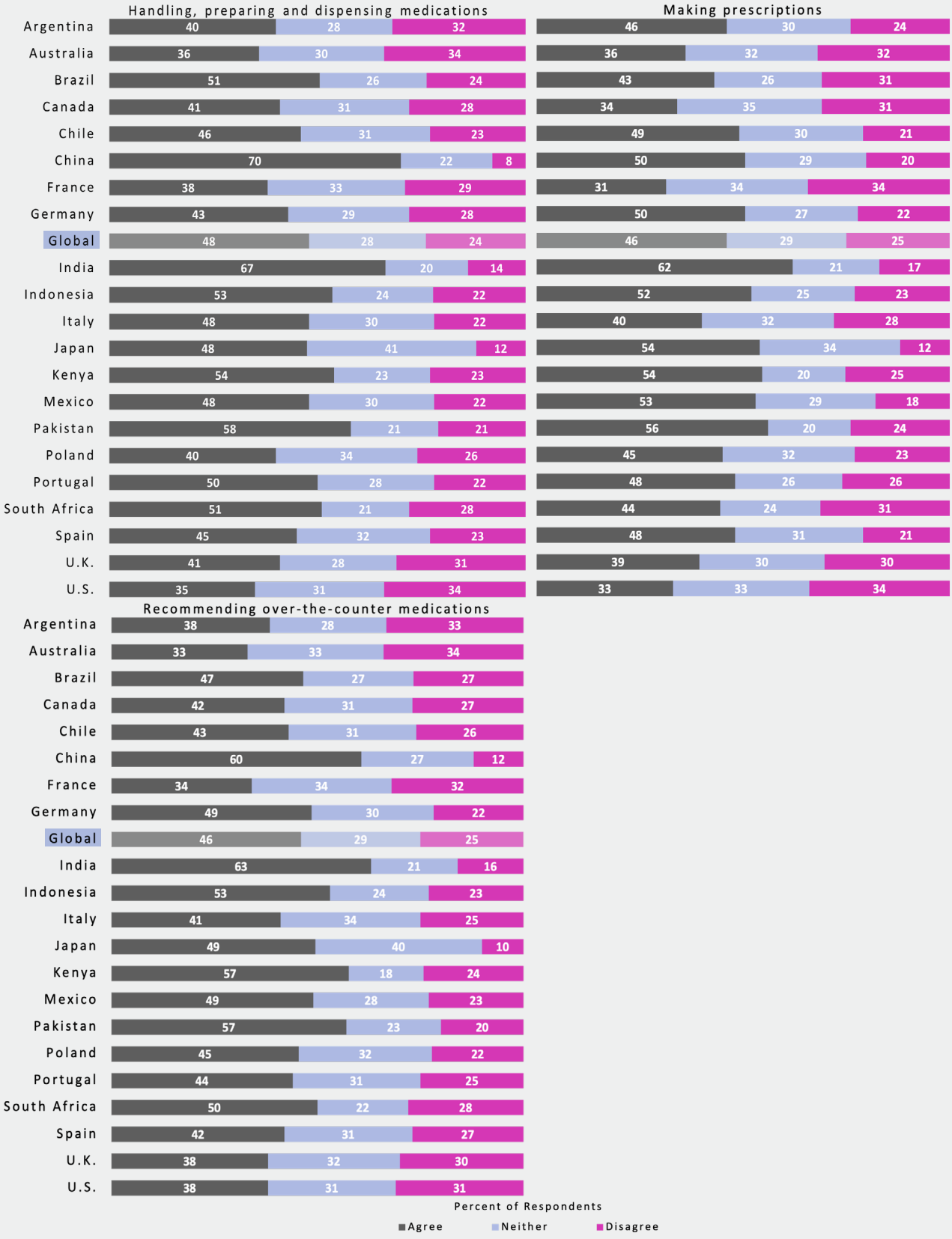
Despite a generally positive outlook, there is significant cross-country variation. Diagnostic imaging has the widest support, but only 38% of Australians agree with its use, compared to 75% of Chinese respondents.

Across potential applications, Australia, Canada, France, the United States of America and the United Kingdom demonstrate consistently low support. Australia has the least support for each usage (<40%) with the exception of robotics for surgery and the pharmaceutical tasks.

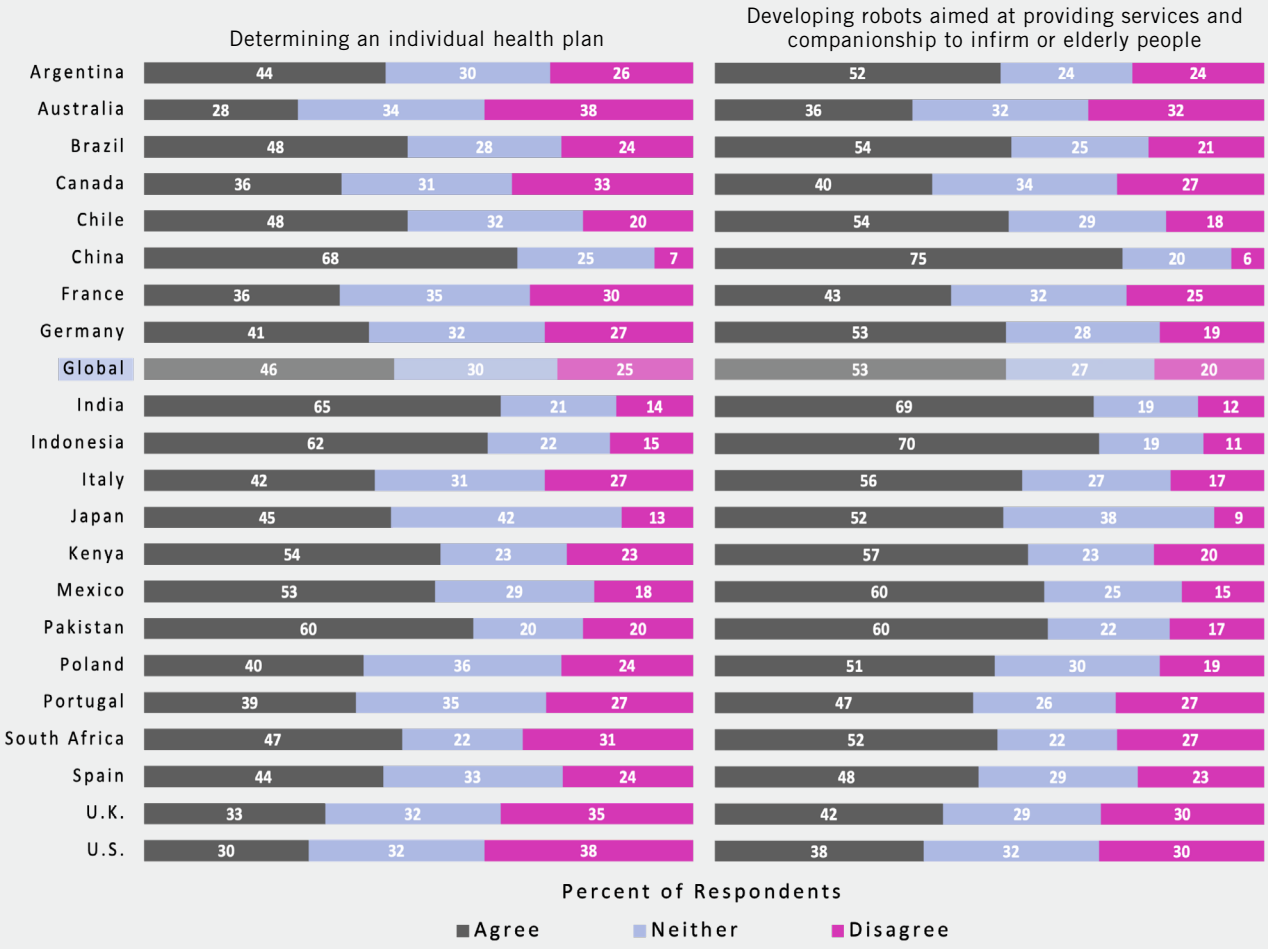
Do you agree or disagree that AI should be used for the following tasks?



Do you agree or disagree that AI should be used for the following tasks?



Do you agree or disagree that AI should be used for the following tasks?



National Health Service and heart disease detection

It typically takes 13 minutes for a physician to analyze MRI test results in order to detect heart disease. The British National Health Service rolled out AI-based software in 2022 that can detect heart disease in 20 seconds—while the patient is still in the MRI machine.

While the effect of the adoption of such technologies on professions such as radiologists is unclear, it is expected to help relieve healthcare backlogs and save an estimated 3,000 clinician days across the system per year.

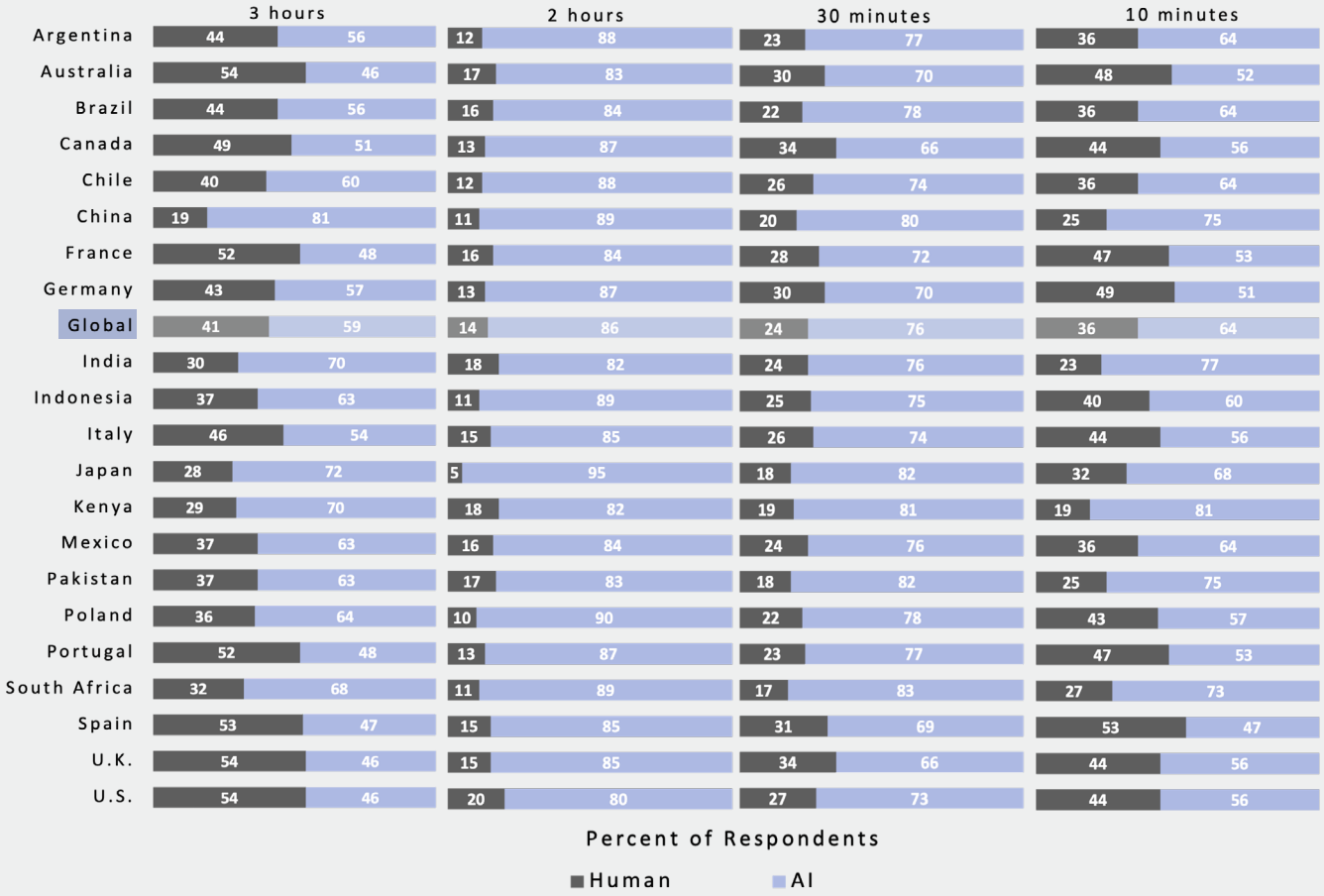
Willingness to consult with an AI-robot nurse

When given the choice between talking to an AI-robot nurse immediately or waiting three hours to speak with a human nurse, globally, most respondents (59%) select an AI-robot nurse.

If a respondent preferred an AI-robot nurse in the first scenario, they were subsequently asked the same question with increasingly shorter wait times (two hours, 30 minutes and 10 minutes). Initial choices remain fairly sticky: 86% of the initial 59% choose AI over a two-hour wait for a human, and, of those, 64% select AI over a 10-minute wait. There is only minor cross-country variation. However, China, India, Japan, Kenya and South Africa show relatively higher levels of willingness to see an AI-robot nurse.

9.4 Preferences for human or AI-robot nurse (%)

Imagine that you are not feeling well and your government has just introduced a new telephone hotline service which will allow you to find healthcare services and information. Would you prefer chatting with an AI-robot nurse right now or talking to a human nurse after waiting on hold more than 3 hours? [Those who chose AI were then asked about increasingly shorter wait times.]



X. AI and Education

AI is proving to be transformative for education. Students can easily access automated tutors that cater to their individual learning styles, and teachers can outsource administrative tasks to AI, freeing up time for student interaction.

However, AI in education poses significant challenges as well. The rapidly expanding capabilities of generative AI are requiring secondary and post-secondary institutions to implement new policies for academic integrity and transparency and engage the rapidly growing field of detection softwares offered by private firms.

Further, fears of widespread job losses led UNESCO to describe a dystopian vision of "teacher-less schools [or] school-less education". AI applications could also dehumanize education, fail to represent cultural diversity and cause a motivation crisis amongst students who believe their job prospects are in peril.

Students come to me doing assignments with AI.

— Respondent (Argentina)

[Se me vienen los alumnos del colegio haciendo los trabajos con IA.]

Uses of AI in education

Approximately half of respondents agree that AI should be used for marking homework and exams, monitoring student activity in-class and intelligent tutoring systems in schools (Figure 10.1).

With more than 60% support across all tasks, China, India, Indonesia, Brazil, Pakistan and Kenya show much stronger levels of support than Australia, the United Kingdom and the United States of America. Australia has the lowest support for the use of AI in all tasks (fewer than 40%), whereas India has the highest support for all applications (over 70%). Indonesia is tied with India in terms of support for classroom monitoring (74%).

Most countries' preferences are stable, with preference ranges within 5% among applications. South Africa is a notable exception, with more support for the use of AI in monitoring and tutoring (61% and 62%, respectively) than for marking (50%).

Think of a chatbot that helps elementary school students' homework.

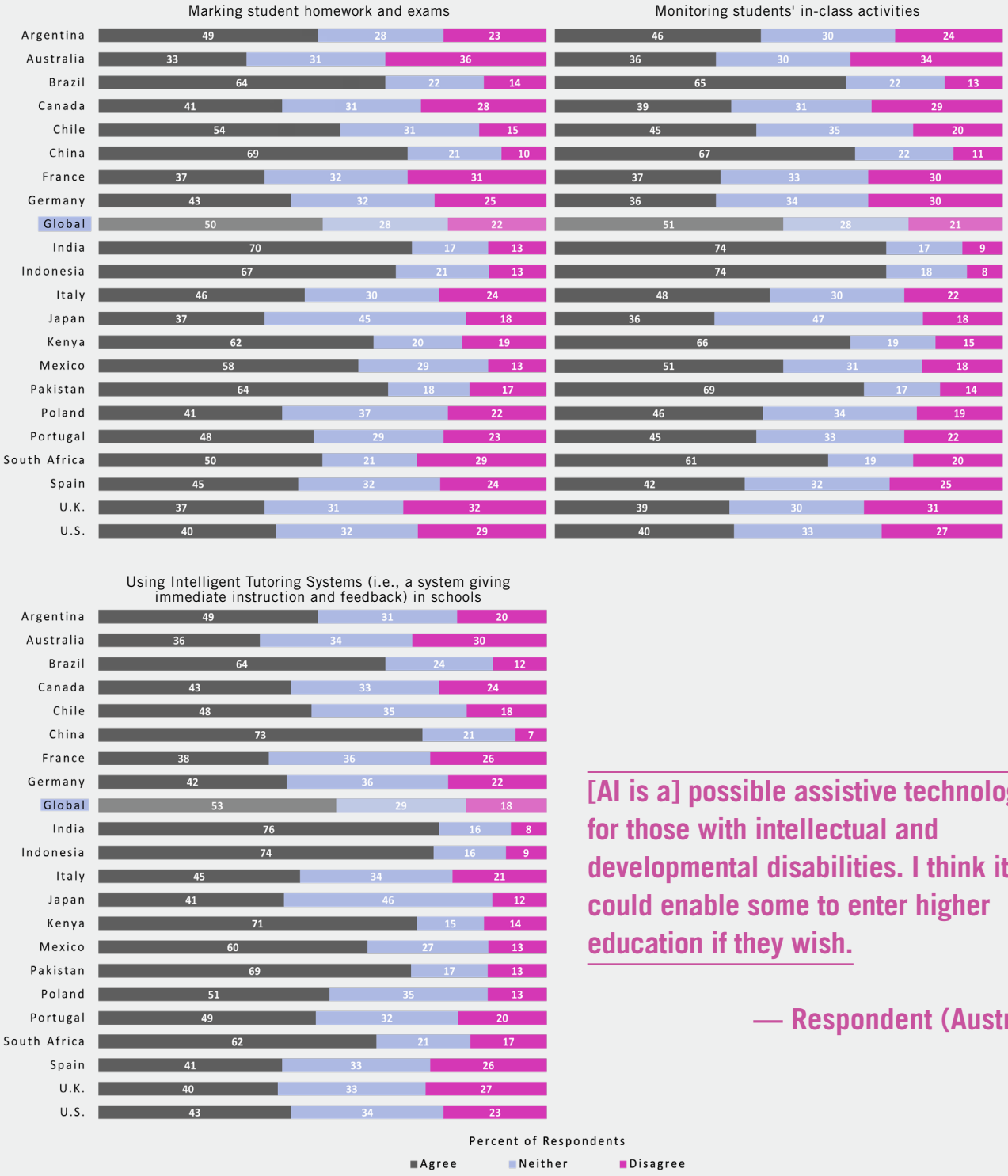
— Respondent (Japan)

[小学生の宿題を手助けするチャットボットを思い浮かべる]

Academic honesty and AI: Turnitin

Turnitin is a popular platform that provides a variety of programs that help identify plagiarism and is used by many higher education institutions. In November 2023, it launched its updated authenticator software, iThenticate 2.0. Within a range of probability, it can detect AI-generated text and traditional plagiarism. Concerns about the accuracy of such AI detectors, however, are widespread and there is evidence that such programs are more likely to return a false positive if the text has been written by a non-native English speaker.

Do you agree or disagree that AI should be used for the following tasks in classrooms?



> [AI is a] possible assistive technology for those with intellectual and developmental disabilities. I think it could enable some to enter higher education if they wish.
>
> — Respondent (Australia)

XI. AI and Justice

While the adoption of new technologies by justice systems around the world was accelerated by the COVID-19 pandemic, many courts had already adopted a range of technologies before 2020. Virtual proceedings and the ability to perform electronically discrete tasks, like filing and notarizing, have become commonplace in many jurisdictions. The advent of widely accessible and powerful AI tools impels the judicial system to decide whether to embrace or avoid these innovations, given the significant potential for improvement as well as notable risks.

Advanced technology can provide the justice system with important benefits. For example, streamlining the organization of files can simplify review processes, helping to manage and expedite the resolution of courts' substantial caseloads. Moving certain disputes out of the courtroom can help individuals receive resolutions more quickly at a lower cost, while relieving the load of the judiciary. Doing so can also address the general lack of knowledge about the legal system, of the existing available resources and of the proximity of relevant legal services. AI can quickly analyze vast amounts of data, and thus could quantify certain legal determinations or address prejudice by uncovering systemic biases in decisions, including those to set bail or offer parole. Increased efficiency in the legal system could reduce costs by bolstering the delivery of legal services and supplanting the role traditionally held by legal experts, thereby extending access to a broader segment of the population.

Yet there are concerns about such uses. Lawyers using technology to expedite drafting briefs may provide confidential or proprietary client information to an AI application, creating significant privacy and disclosure issues. AI systems tend to operate as black boxes; despite a known input and output, there is little, if any, insight into the processes that lead to decisions, recommendations or predictions. When trained on flawed or prejudiced data, the outputs of the AI will replicate existing patterns and can further amplify inequities. These risks are particularly important when predictions have an impact on the freedom, safety or privacy of individuals.

AI and legal tasks

Respondents are divided about whether or not lawyers should use AI. Around 40% agree with lawyers using it to answer client questions or to predict the likelihood of winning a pleading. About 30% of respondents do not think lawyers should use AI for either of these purposes.

There is, however, significant variation among countries. Those in China and India are most in favour of these uses by lawyers; more than 60% of respondents in each country agree. By comparison, fewer than 30% of respondents from Australia and the United Kingdom approve of its use.

11.1 AI use by lawyers (%)

Do you agree or disagree that AI should be used by lawyers for the following tasks?

AI in the criminal justice system

Respondents are less in favour of the use of AI for proposed applications in the criminal justice system than for those proposed for lawyers (Figure 11.2). Using AI to adjudicate bail hearings is slightly more acceptable (34%) than for determining guilt in a criminal trial (30%) or making a parole board decision (33%).

Those from India are the most in favour of the use of AI in the criminal justice system (between 60% and 62% across applications). And, despite strong support for AI use in many other instances, Indonesian respondents show relatively little support for these applications (<40%).

The times must move forward, mankind must progress and society must develop. Artificial intelligence will definitely coexist with humans. We must improve the legal system and let the law regulate the development and application of artificial intelligence.

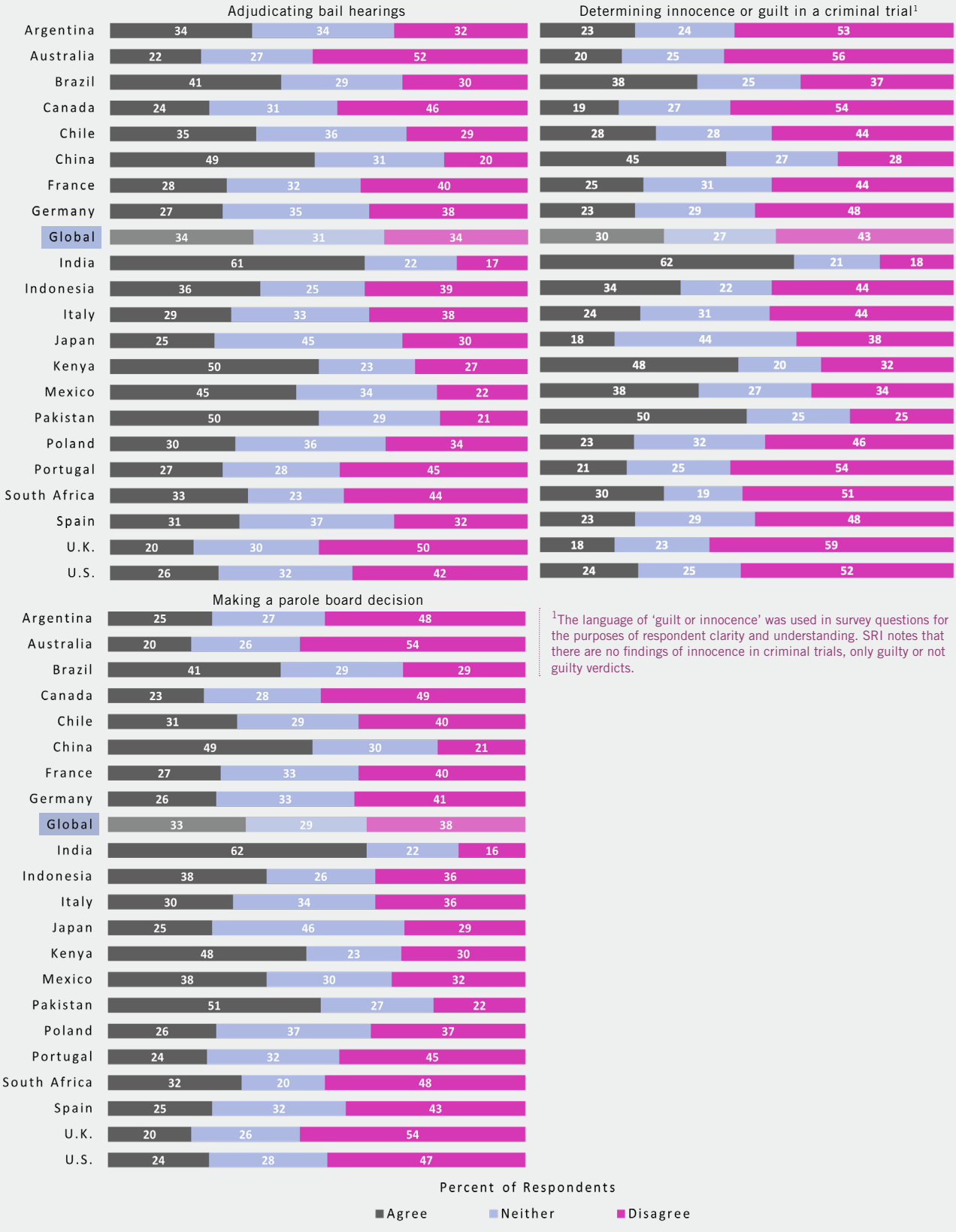
— Respondent (China)

[时代必须前进，人类必须进步，社会必须发展。人工智能必将与人类共存，完善法制建设，让法律来监管人工智能的发展和应用。]

AI in US justice: Criminal risk assessments algorithms

Criminal risk assessment algorithms are widely used across the United States with the intention of efficiently clearing some of the backlogs of defendants needing to be moved through the legal system. These tools assign a single recidivism score based on a defendant's profile and thus have a direct impact on future decisions about rehabilitation, pre-trial detention and sentencing. Concerns about these tools have been voiced by many groups, including community advocates like Data for Black Lives, as they have been shown to disproportionately affect historically targeted communities. Such tools can perpetuate biases in the system while also generating further new biased data.

Do you agree or disagree that AI should be used for the following tasks?



[1]The language of 'guilt or innocence' was used in survey questions for the purposes of respondent clarity and understanding. SRI notes that there are no findings of innocence in criminal trials, only guilty or not guilty verdicts.

AI and policing

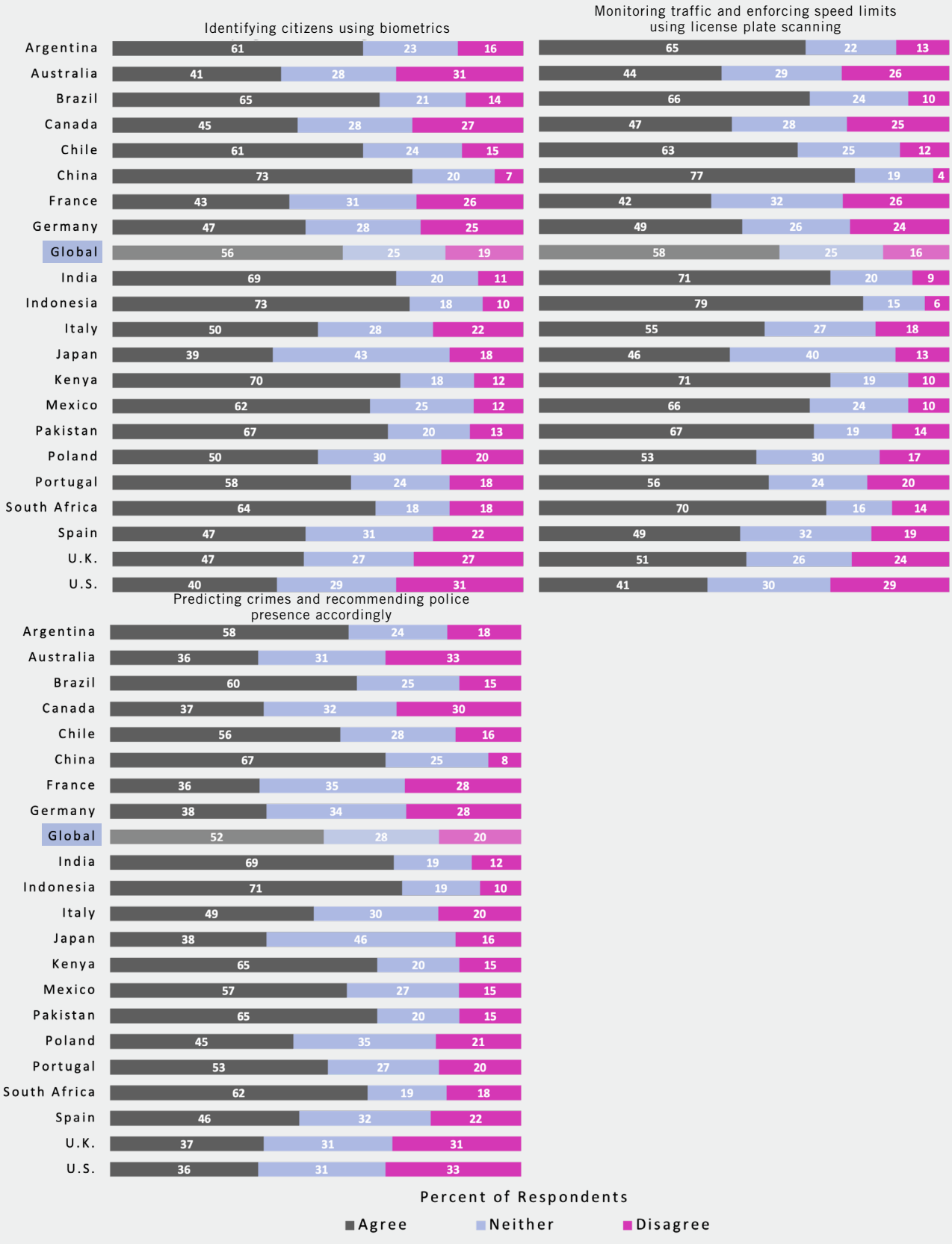
A slight majority of global respondents agree with the use of AI for proposed policing tasks: biometric identification such as retina or facial recognition (56%), traffic monitoring (58%) and predictive policing (52%) (Figure 11.3). American, Australian, British, Canadian, French, German, Italian, Japanese, Polish and Spanish respondents are generally less in favour than the global mean. Americans are the most strongly opposed to these applications, with the highest proportion of respondents disagreeing.

AI and the Toronto Police Service

In 2022, the Toronto Police Service (TPS), the largest municipal police service in Canada, approved a policy outlining guidelines for integrating AI technology into its operations. The policy defines five levels of risk based on several key factors. These include whether a human is included in the process, the ability to identify bias in the data used and the types of tasks the system will be applied to. In particular, the TPS policy was intended to guide the implementation of a facial recognition mugshot database.

The policy met with criticism, including from the head of the Ontario Human Rights Commission, who, in a 2024 report, called for the TPS to commit to even greater transparency. The report flags many potential misapplications and biases in the proposed operations, including the mugshot database, which might amplify past excessive, discriminatory or unlawful police practices.

Do you agree or disagree that AI should be used for the following tasks?

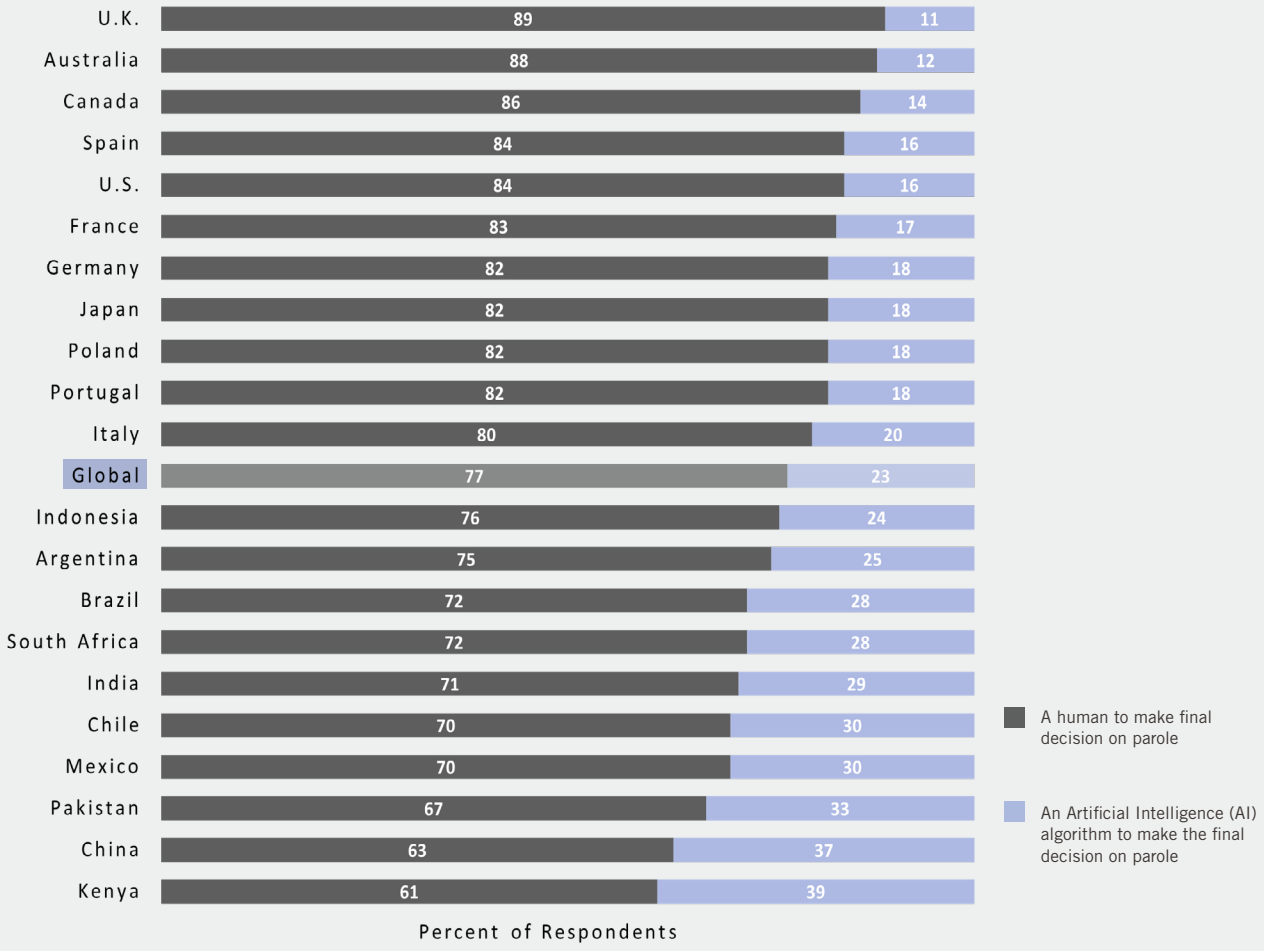


AI and parole decisions

Globally, respondents strongly prefer humans to make the final decision on parole (77%), rather than an AI algorithm. There is significantly less variation among countries than in other legal applications. Only 61% of Kenyans prefer human decision makers (the lowest reported percentage), as compared to 89% of respondents in the United Kingdom (the highest).

11.4 Preference for human or AI making final decision on parole (%)

In bail decisions, algorithms are used to assess a defendant's risk of flight or reoffending, while parole decisions may use algorithms to predict a prisoner's likelihood of recidivism [reoffense]. In these cases, algorithms are used as a decision-making aid to help judges and other decision makers make more informed decisions. Would you prefer a human to make the final decision on parole or an AI algorithm to make the final decision on parole?



XII. AI and Immigration

AI can be incredibly useful in streamlining immigration procedures. Specific AI tools play a large role in facilitating case management, conducting legal research and efficiently handling day-to-day tasks, such as form completion, data entry and translations. This automation significantly reduces the time required for routine activities, allowing for greater efficiency and reduced backlogs.

Integrating AI into immigration practices is cost effective and assists with the prompt identification of missing documents or application issues. Using AI can not only improve data accuracy and security but also empower authorities to respond promptly to notifications of suspicious activity or problematic applications.

As with many of its uses, however, AI has the potential to cause harm. It may exacerbate existing inequities in the immigration process, including over-surveillance and racial bias. There are well-founded concerns about whether governments can ensure the transparency and accountability of systems with opaque decision-making processes.

Computers seem impartial and unbiased. Does it mean they can make life or death decisions?

— Respondent (Pakistan)

AI in immigration decisions

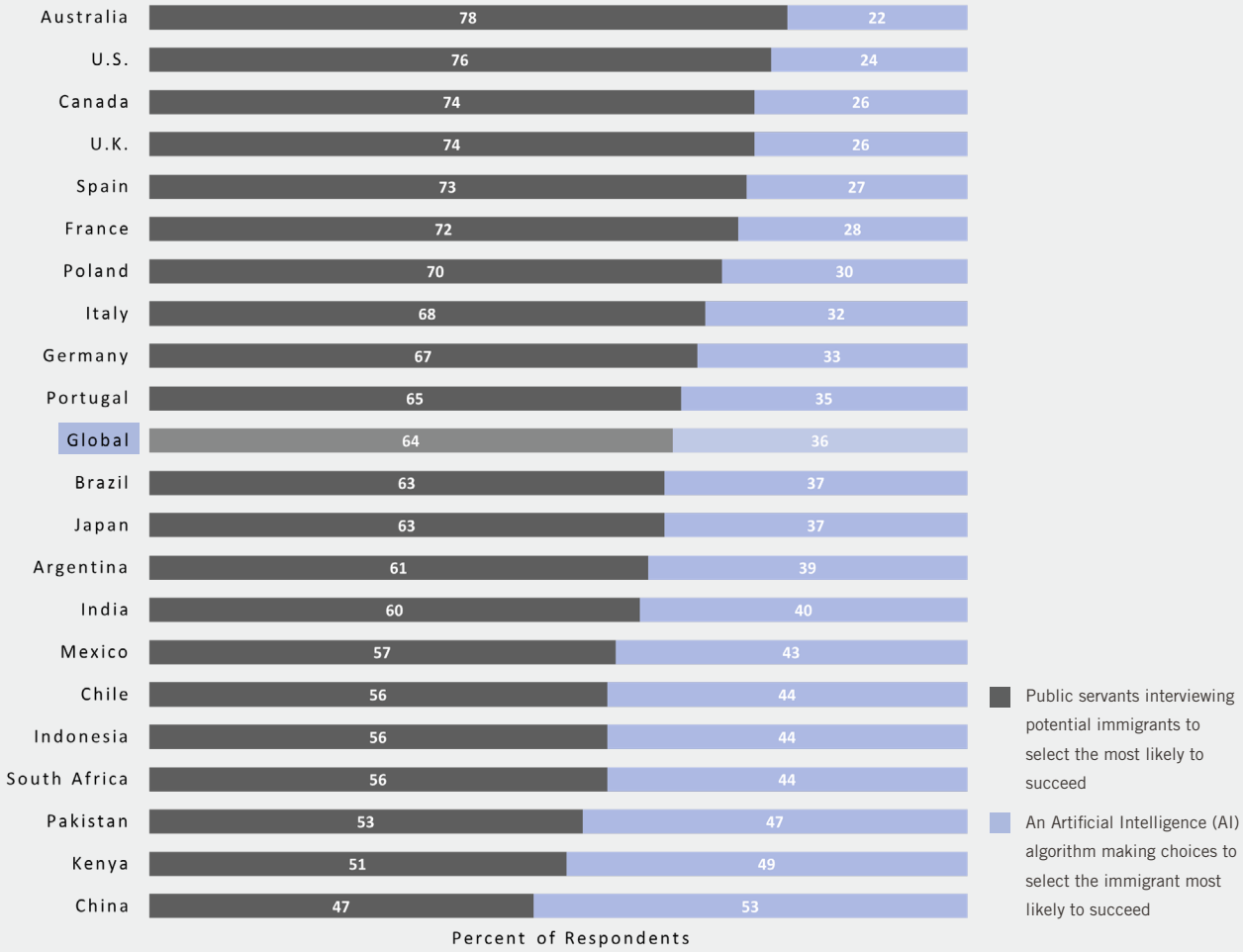
Globally, most respondents prefer that immigration-related decisions be made by a human public servant (64%) rather than an AI algorithm.

China is a notable outlier, as the only country in which there is a greater preference for the use of an algorithm (53%) over a human decision-maker.

North American and European countries are strongly in favour of human decision-makers (over 70%), while Australian respondents demonstrating the highest support at 78%.

12.1 Preference for human or AI making immigration decisions (%)

Some governments use point systems or other metrics to make immigration-related decisions in which a potential immigrant is scored according to their education, age, skill sets and other factors related to their ability to work and earn income. Which methods for selecting immigrants do you prefer?



AI at airports and border crossings

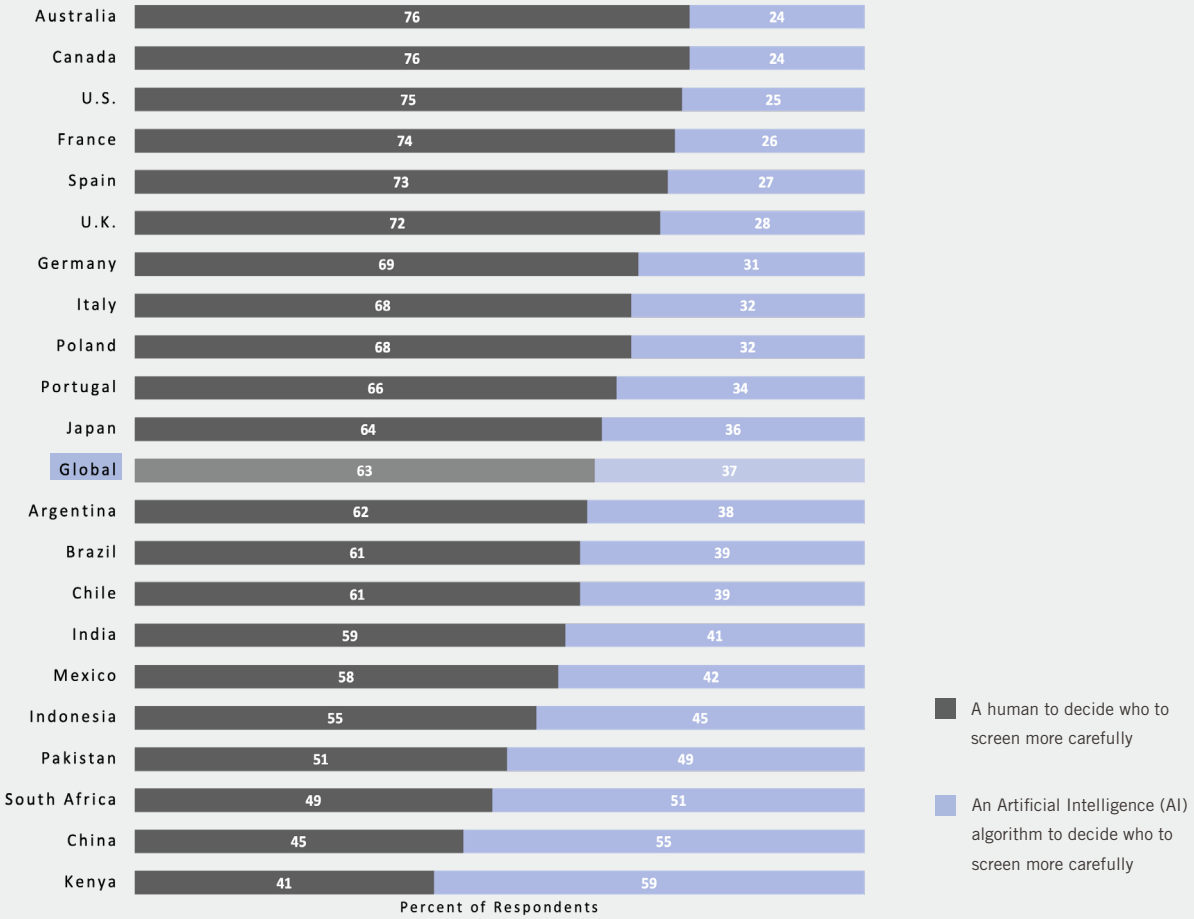
Globally, most respondents would rather have humans screen people entering the country at airports (63%), as opposed to AI algorithms.

China, Kenya and South Africa are exceptions; the majority of people in these countries prefer to have AI algorithms make these decisions (55%, 59% and 51%, respectively). In all other countries, respondents prefer human decision makers.

As with immigration decisions, Australia, Canada, France, Spain, the United Kingdom and the United States of America are strongly in favour of humans making the decision to screen at border crossings; more than 70% of respondents from those countries prefer a human.

12.2 Preference for human or AI deciding who to screen more carefully at border crossings (%)

Airports are often extremely busy, increasing travel time. Some governments now use AI algorithms at the border as security agents to process people entering the country. Would you prefer a human to decide who to screen more carefully or an AI algorithm to decide who to screen more carefully?



Use of AI for immigration and border screening

Globally, more than 50% of respondents agree with the government using AI for certain tasks related to immigration and border screening (Figure 12.3). There is slightly more support for using it to assess travellers for additional security screening (57%) and slightly less support for using it to assist public servants in their decisions regarding immigration (51%).

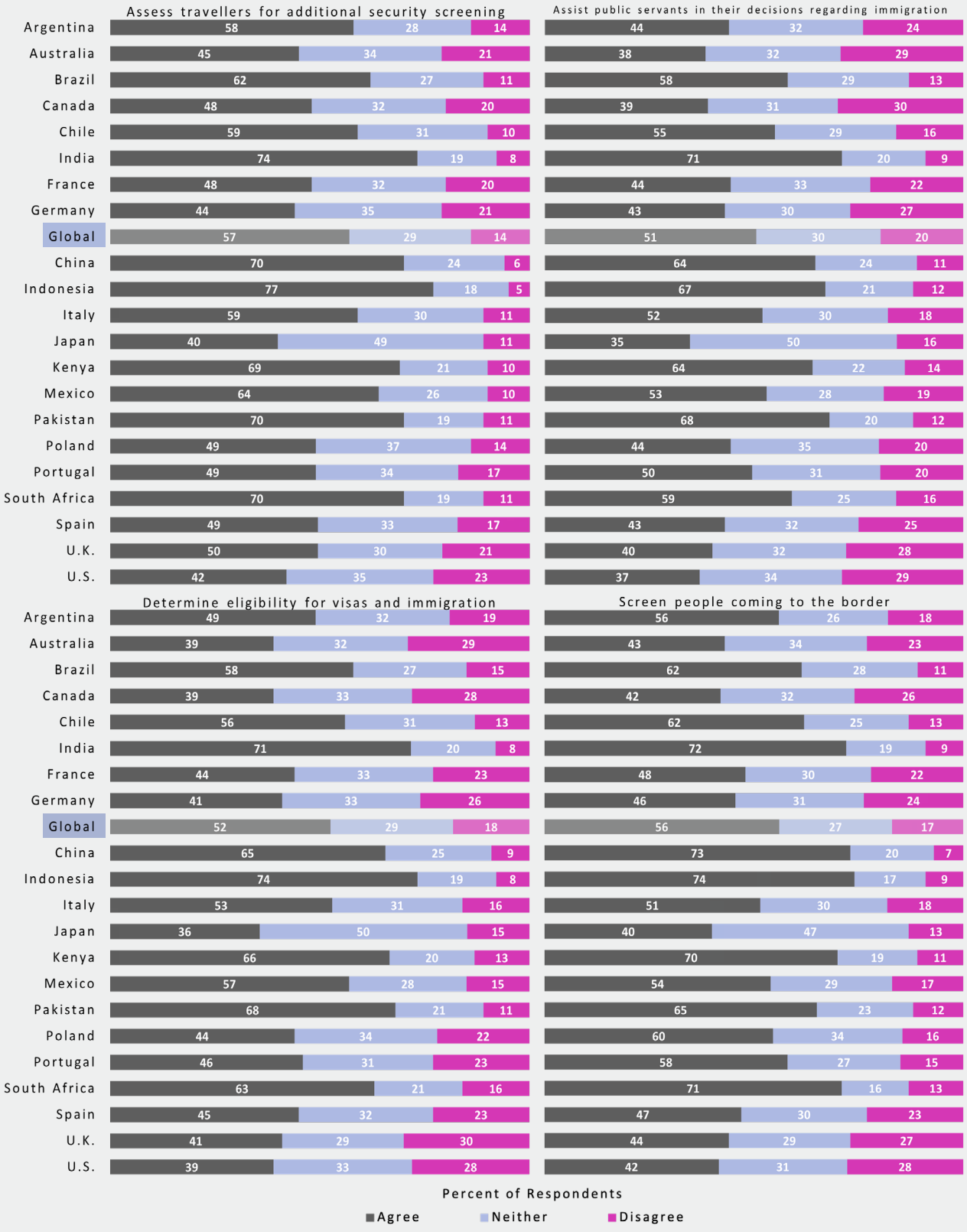
China, India, Indonesia, Kenya and Pakistan all express particularly high levels of support for the use of AI (often over 70%). Australia, Canada and the United States express consistently low support (often below 45%). Those from Japan demonstrate the least certainty, with almost half of all respondents neither agreeing nor disagreeing with AI use for these applications.

Artificial Intelligence invokes a spectrum of perceptions in the public. Some view AI with admiration, recognizing its benefits and possibilities, while others harbour uncertainties, potential threats and fears about its implications. AI's notable advantage lies in its unbiased decision.

— Respondent (Pakistan)

12.3 Support for government use of AI in immigration and border screening (%)

How much do you support the use of AI algorithms by government to...



XIII. AI and Government

The use of AI in the public sector has enhanced information processing, risk identification, continuous monitoring and the automation of routine services. For example, chatbots can schedule meetings, address frequently asked questions and direct requests to relevant departments. AI technology is also used for filling out forms, aiding in document searches and assisting with recruitment processes. These applications can decrease the time spent by government employees on repetitive tasks while ensuring better accuracy when cross-referencing information across documents, improving resource allocation and efficiency.

While it still lags behind the private sector in the use of AI, the public sector's adoption of these technologies comes with different priorities. Government officials must carefully weigh the benefits of AI on public policies and programs against potential legal, moral and ethical concerns.

The public sector faces challenges such as training existing staff on AI systems when there is a lack of specialized talent. Ethical and legal concerns may also arise when there are unclear regulations governing the use of AI within government. Additionally, securing funding for smooth implementation can be difficult, especially when governments may be hesitant to invest in AI tools.

Certain aspects of AI sound appealing, but I am VERY skeptical of government using this in the future, and also concerned over citizens' privacy.

— Respondent (Australia)

AI and government services

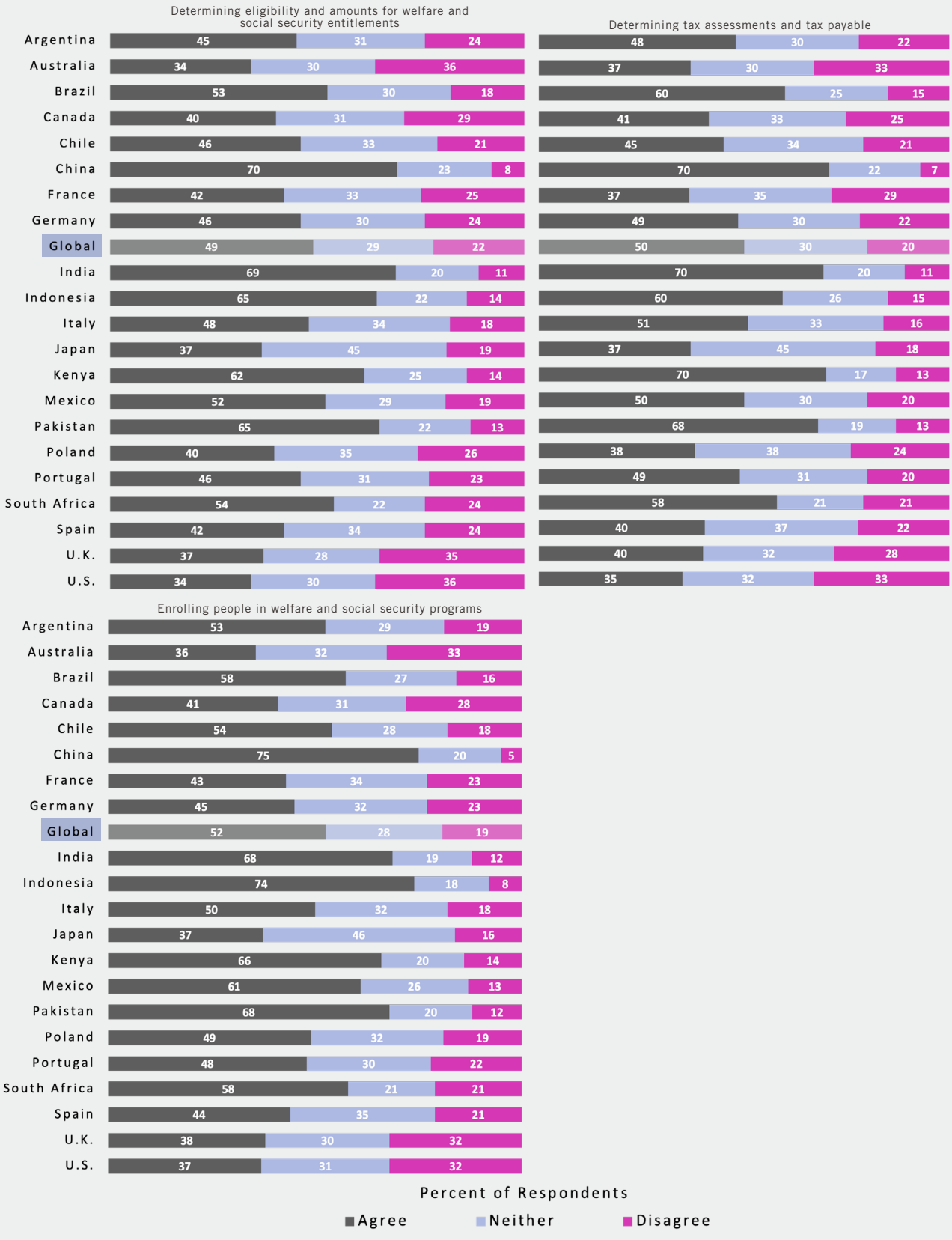
About half of respondents agree with the use of AI by their government for tax and social welfare applications (Figure 13.1). The variation in level of support for the different proposed applications is minimal. Slightly fewer respondents support AI determining eligibility and amounts for social welfare and social security entitlements (49%) and slightly more support AI enrolling people in welfare and social security programs (52%). On average, China, India, Indonesia and Pakistan demonstrate the highest level of support for government use of AI (more than 68% of respondents). Australia and the United States of America consistently demonstrate the least support (less than 37%).

The United States government's AI inventory

A 2020 executive order mandated that all American federal agencies provide an AI inventory that outlines all internal uses of artificial intelligence. NASA reported 32 separate uses in 2023 alone for activities including mapping surface water and ship detection. Nearly all American departments, including Commerce, Justice, Veteran Affairs and the Environmental Protection Agency provide detailed disclosures. A subsequent executive order in October 2023 expanded governmental purview over AI development, including mandating that private firms share safety test data with the government.

13.1 AI use by governments in tax and social welfare applications (%)

Do you agree or disagree that AI should be used for the following tasks?



Support for government use of AI to identify fraud, misuse or noncompliance is somewhat higher (around 60% for all applications) (Figure 13.2). Attitudes vary by country, with Indonesia, India and China again expressing high levels of support. The United States, Japan and Australia show some of the lowest support. However, unlike in the tax and social welfare applications, support does not drop below 40% for any country or application, suggesting global attitudes toward the use of AI for fraud, misuse and noncompliance are somewhat more positive.

The regulation of AI and regenerative AI and its implementation in society should be controlled for the benefit of society. And governments should not be allowed to disregard the good or misuse made of them.

— Respondent (Spain)

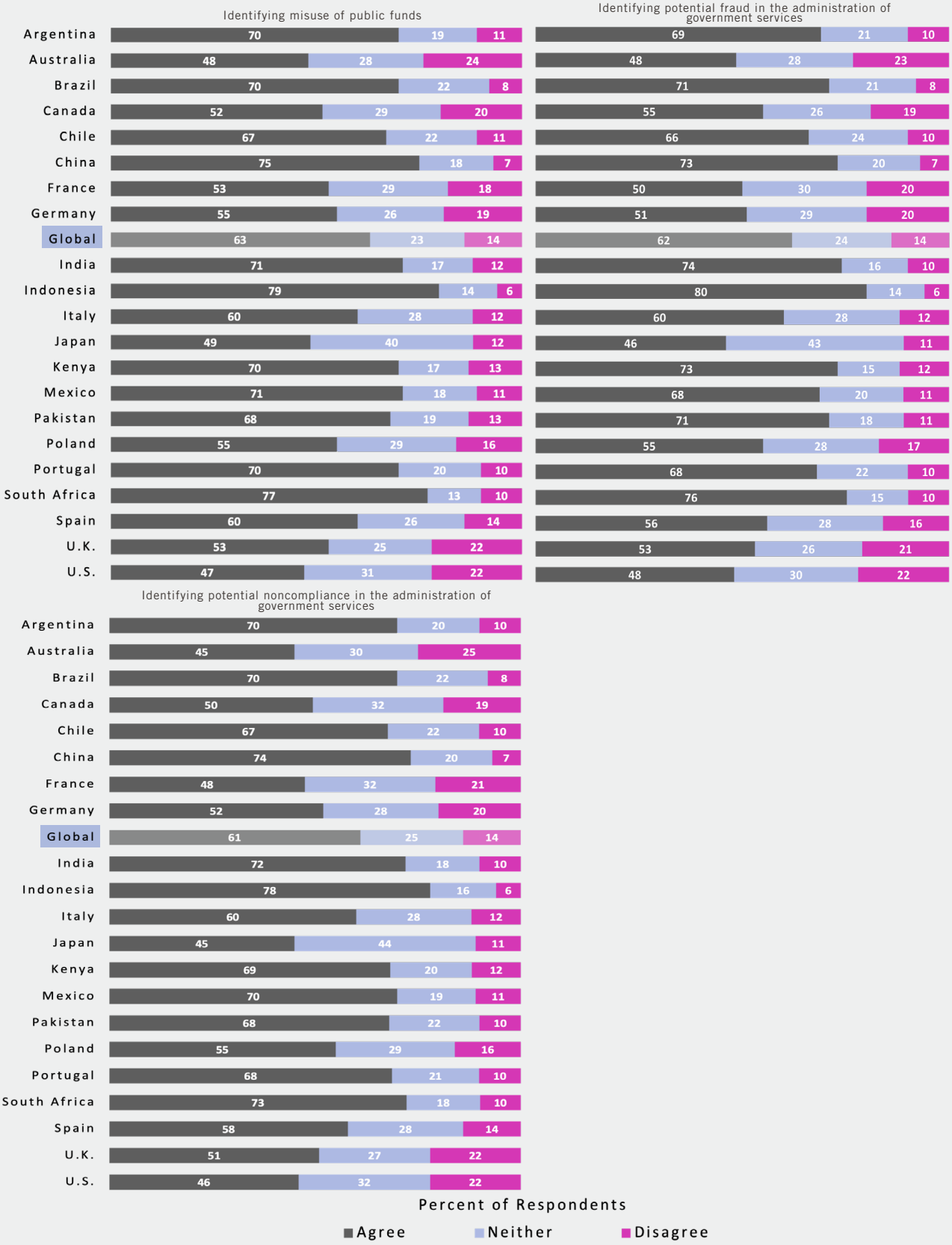
[La regulación de la IA y la IA regenerativa y su implementación en la sociedad, debería ser controlada en beneficio de la sociedad. Y no permitir que los gobiernos se desentiendan sobre el buen o mal uso que se hace de ellas.]

[AI is] what the government uses to help protect our country.

— Respondent (U.S.)

13.2 AI use by government to identify fraud, misuse or noncompliance (%)

Do you agree or disagree that AI should be used for the following tasks?



Sharing and gathering information with AI

Globally, respondents agree that AI should be used in a variety of public information sharing and gathering services, including classifying emergency calls based on urgency (54%), monitoring social media for public safety (57%) and notifying citizens when they need to provide information or documents to the government (59%) (Figure 13.3).

India, Indonesia and China once again express some of the highest support levels (more than 70%). The United States of America remains largely unsupportive, joined to varying degrees by countries including Australia, Canada and the United Kingdom (frequently fewer than 45%). Japanese respondents are again largely unsure (more than 40%).

[AI is an] important tool for the good and hopefully will be regulated properly so that we can all reap the goodness of the technology.

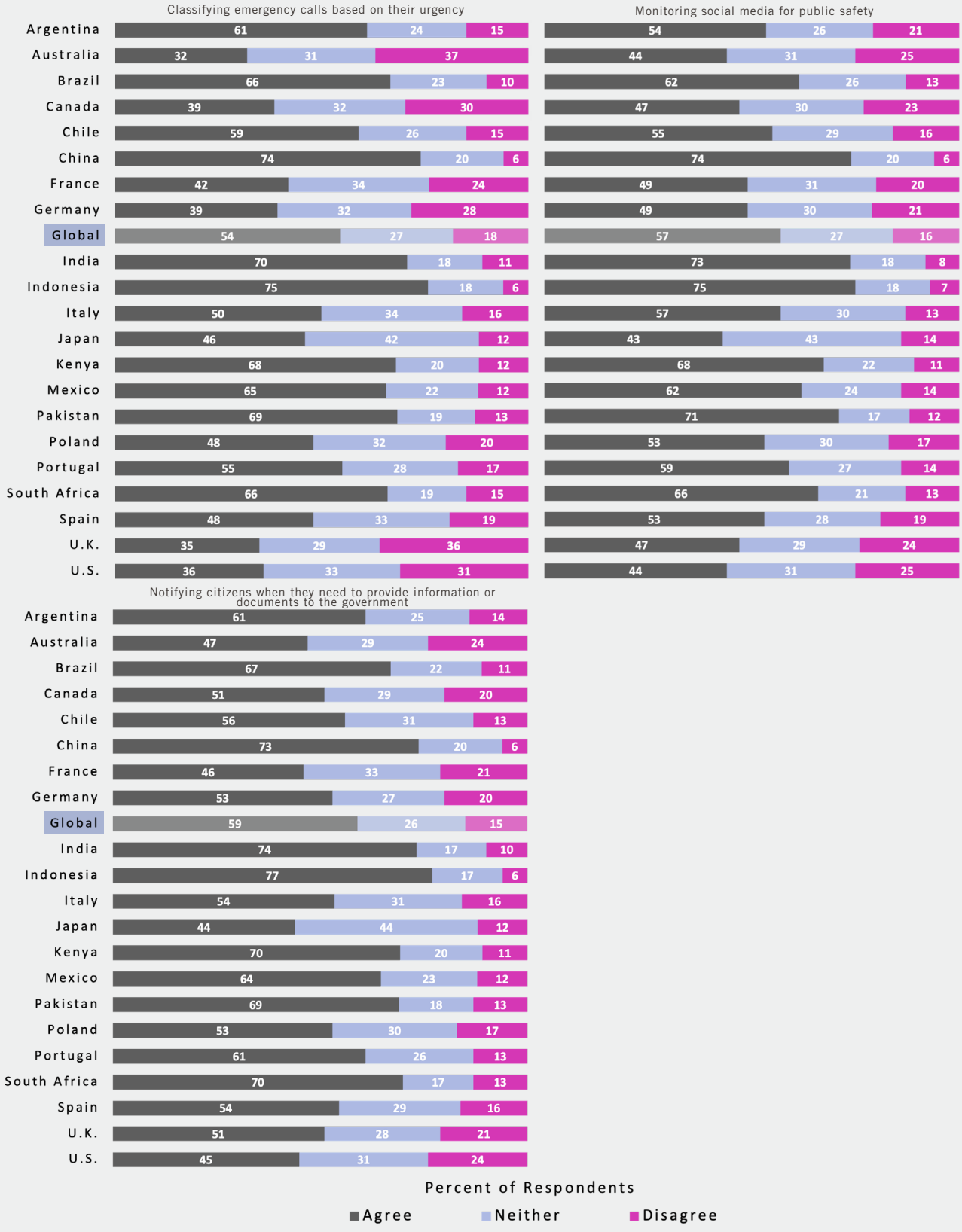
— Respondent (Canada)

I worry about the security and inability to control it in the future.

— Respondent (U.S.)

13.3 Use of AI by government in government services (%)

Do you agree or disagree that AI should be used for the following tasks?



XIV. AI Policy Institute Questions

The Artificial Intelligence Policy Institute (AIPI) is an American non-profit organization committed to collaborating with journalists, lawmakers, government officials, researchers and other AI safety organizations in order to address and mitigate potential risks associated with emerging AI technology. The Institute conducts research to identify and advocate for government policies aimed at significantly reducing the destabilizing effects of AI.

In September 2023, the AIPI conducted a survey of over 1,000 American voters, gaining relevant insights into public opinion about AI.

Below, the GPO-AI borrowed several of the questions asked by the AIPI, replicating them on a global scale. This was done to gather additional insights into how opinions on several major questions about AI vary across the globe.

Artificial Intelligence is the most important technology in the digital transformation we are experiencing, both due to the breadth of impact and the speed of transformation.

— Respondent (Brazil)

{A Inteligencia Artificial é a tecnologia mais importante da Transformação Digital que estamos vivendo, tanto pela amplitude de impacto como pela velocidade de transformação.}

AI development

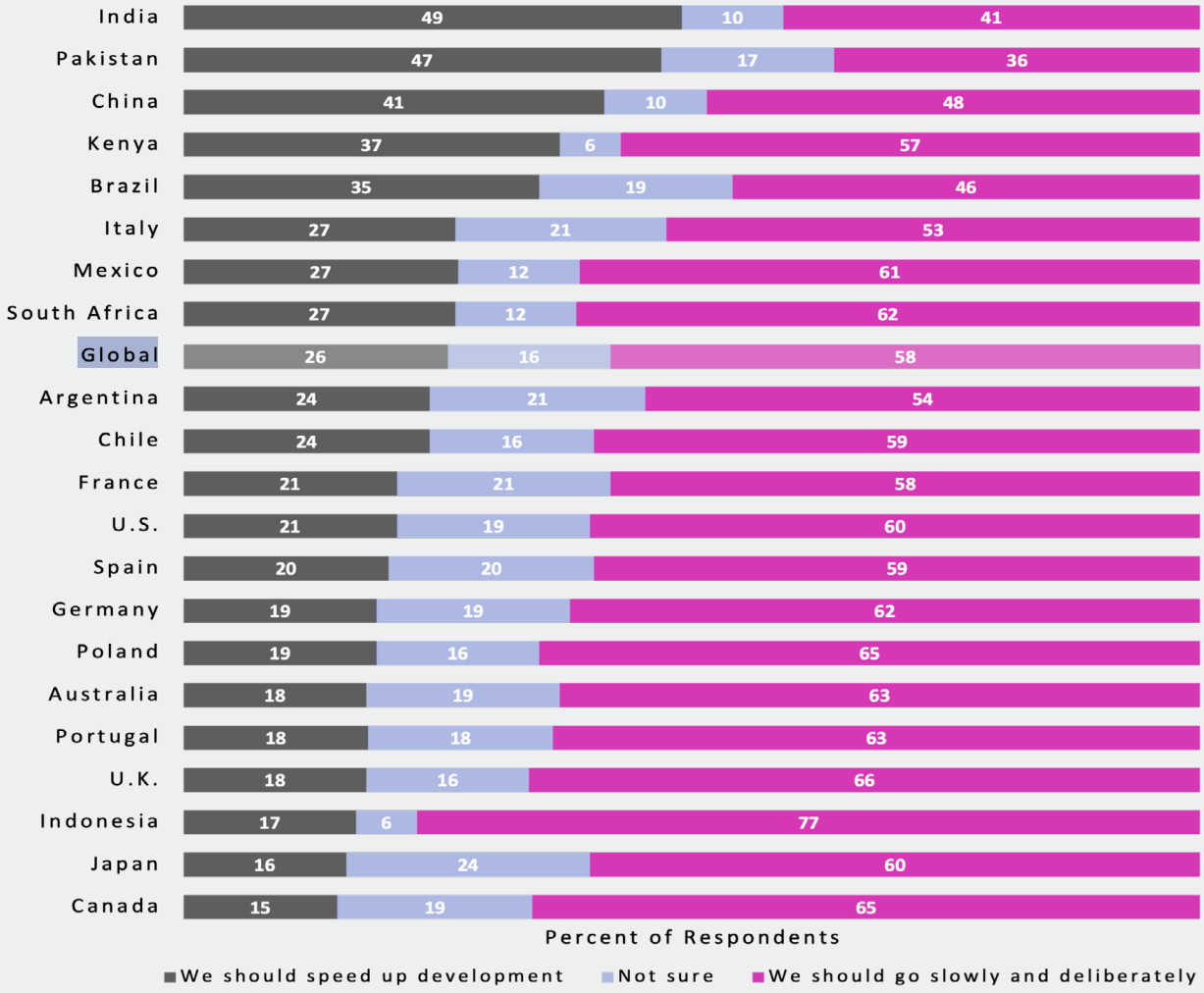
When asked to choose between speeding up AI development or slowing it down, most respondents (58% of the global sample) prefer a slow and deliberate approach to AI development.

Those in India and Pakistan are most in favour of speeding up development (49% and 47%, respectively) but there is also significant support from Brazil, China and Kenya.

> I hope it will stop because I'm afraid of it.
>
> — Respondent (France)
>
> *{J'espère que ça s'arrêtera car j'en ai peur.}*

14.1 Preference for speed of AI development (%)

Some people say we should speed up AI development because it will bring technology which makes our lives healthier and happier. Others say going too fast could be dangerous as fast AI progress poses safety risks and could upend the economy, so we should move slowly and deliberately. What do you think?



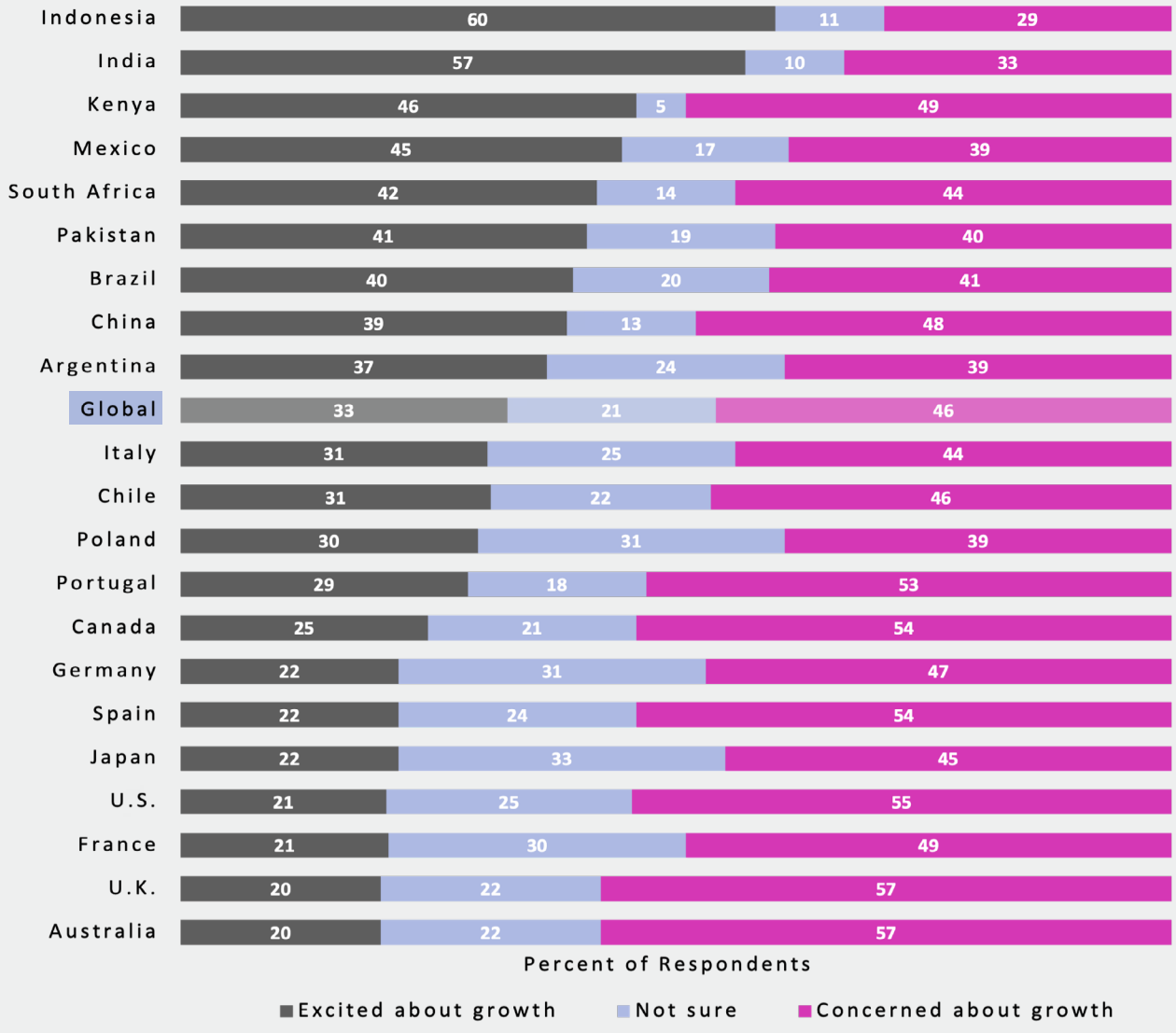
Respondents were then asked, on the whole, whether they are more excited or concerned about AI; 46% of respondents indicate they are concerned.

A desire to proceed cautiously does not preclude excitement about the growth of AI. Among Indonesians, for example, more than three quarters of respondents (77%) would prefer to move forward deliberately (Figure 14.1), but 60% are nonetheless excited about the growth of AI (Figure 14.2), a greater proportion than any other country.

> **[AI is] a technology that has already gone too far and the consequences of it are tragic.**
>
> **— Respondent (Poland)**
>
> *{technologia ktora zaszla juz za daleko a konsekwencje tego bada tragiczne}*

14.2 Excitement or concern for AI growth (%)

On the whole, when thinking about AI, would you say you are more excited about growth in AI or more concerned?



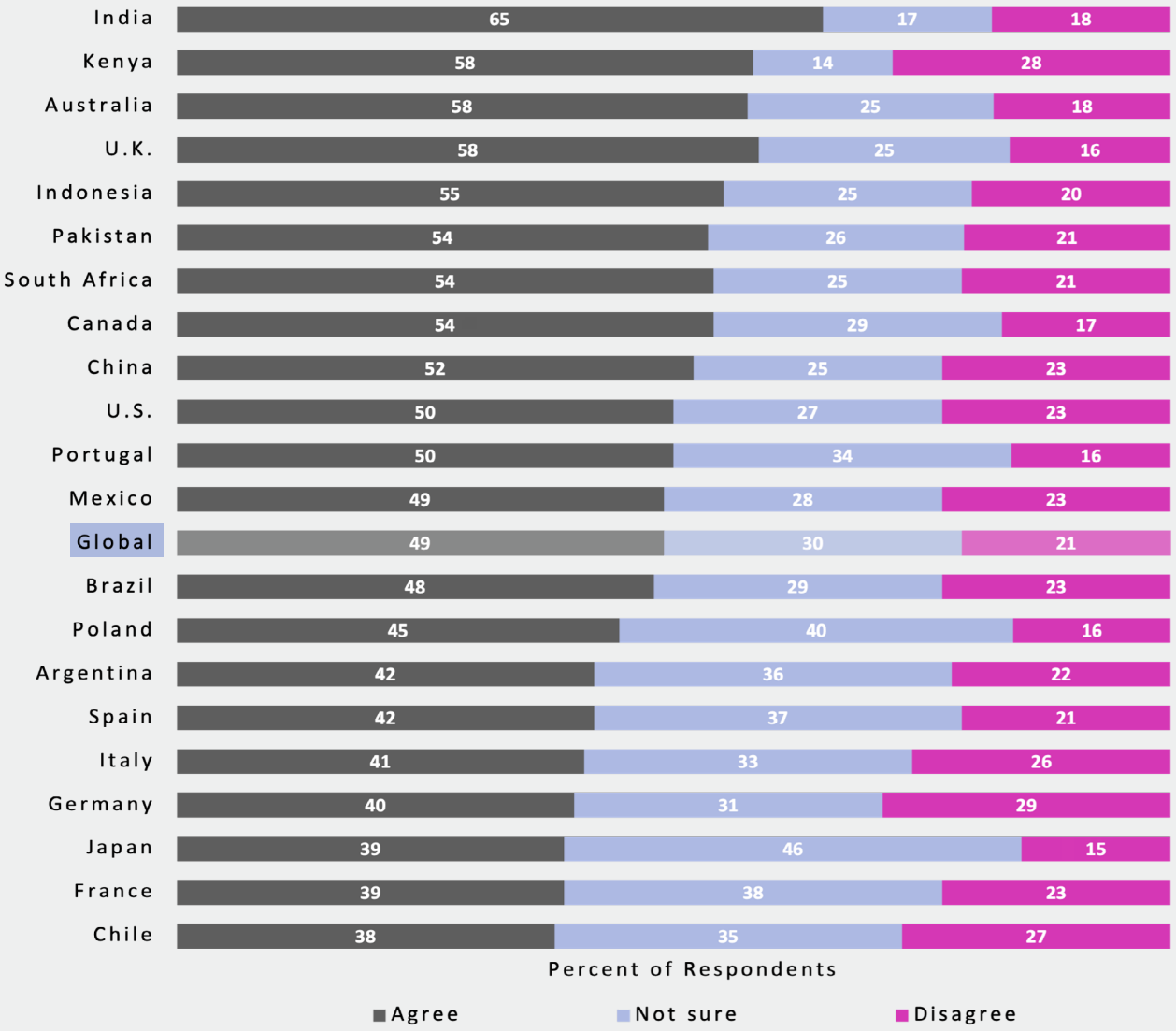
Self-regulation of AI by technology companies

Almost half of global respondents agree that the executives of technology companies cannot be trusted to regulate the AI industry (49%). This belief is particularly strong in India, where 65% agree. Those in Australia, Kenya, Indonesia and the United Kingdom are also strongly in agreement.

Technology companies were one of the most supported actors to regulate (Figure 4.1), yet comparatively low support is demonstrated in this question. This discrepancy suggests that while the public may have reasons for supporting technology companies (for example, they are seen as having greater resources and among the highest level of knowledge about AI), this does not mean that the public supports technology companies in fully self-regulating or having too much control over regulatory processes.

14.3 Self-regulation by technology companies (%)

Agree or disagree: Technology company executives can't be trusted to self-regulate the AI industry.

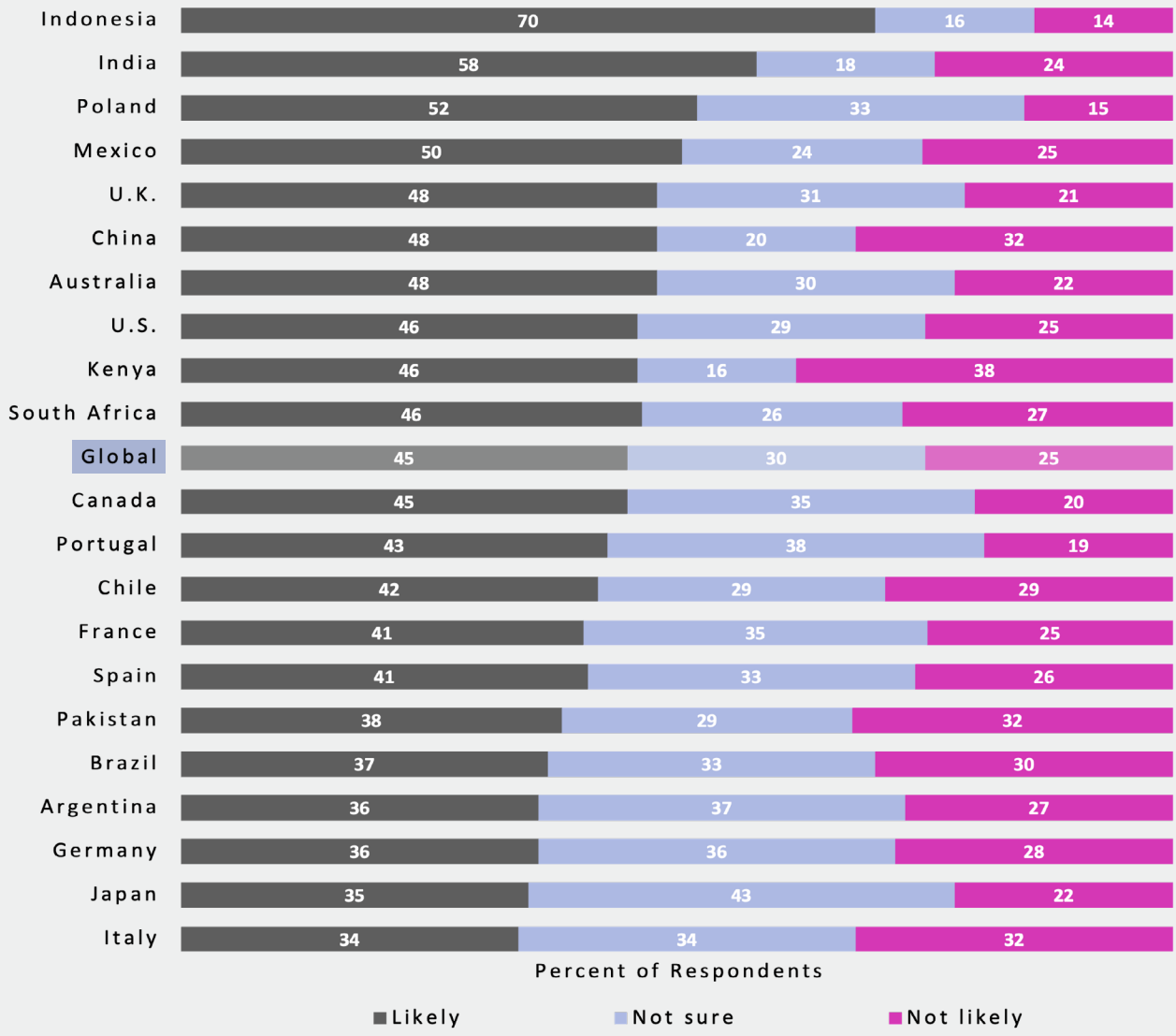


Catastrophic AI event

Globally, more respondents (45%) believe AI is likely to accidentally cause a catastrophic event than are unsure (30%) or think it is unlikely (25%).

In all countries except Indonesia, India, Poland and Mexico, fewer than 50% of respondents believe a catastrophic event caused by AI is likely. 70% of respondents in Indonesia believe such an event is likely. Kenyans have the greatest number of respondents who believe it is not likely (38%).

14.4 Perceived likelihood of AI causing a catastrophic event (%)



Extinction risk

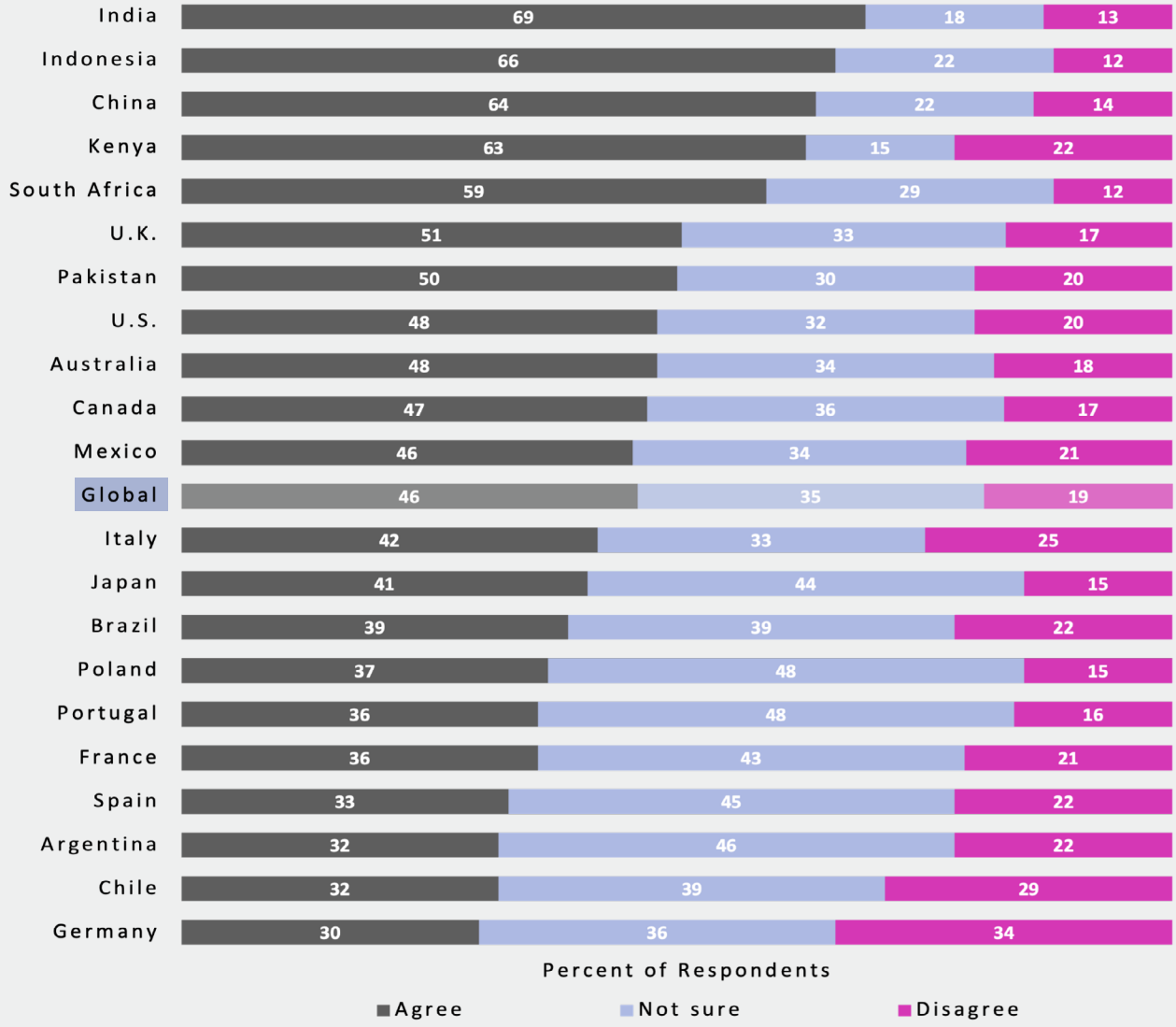
Globally, more respondents agree that mitigating the risk of extinction from AI should be a global priority (46%) than disagree (19%) or are unsure (35%).

In Germany, 34% of respondents don't believe that this risk is a global priority alongside other societal-scale risks, such as pandemics or nuclear war.

More than 60% of respondents in Kenya, China, Indonesia and India agree the risk of extinction from AI should be a global priority. The next most concerned populations are South Africa, the United Kingdom, and Pakistan.

14.5 Prioritization of mitigating the risk of extinction from AI (%)

Mitigating the risk of extinction from AI should be a global priority alongside other societal-scale risks, such as pandemics and nuclear war.

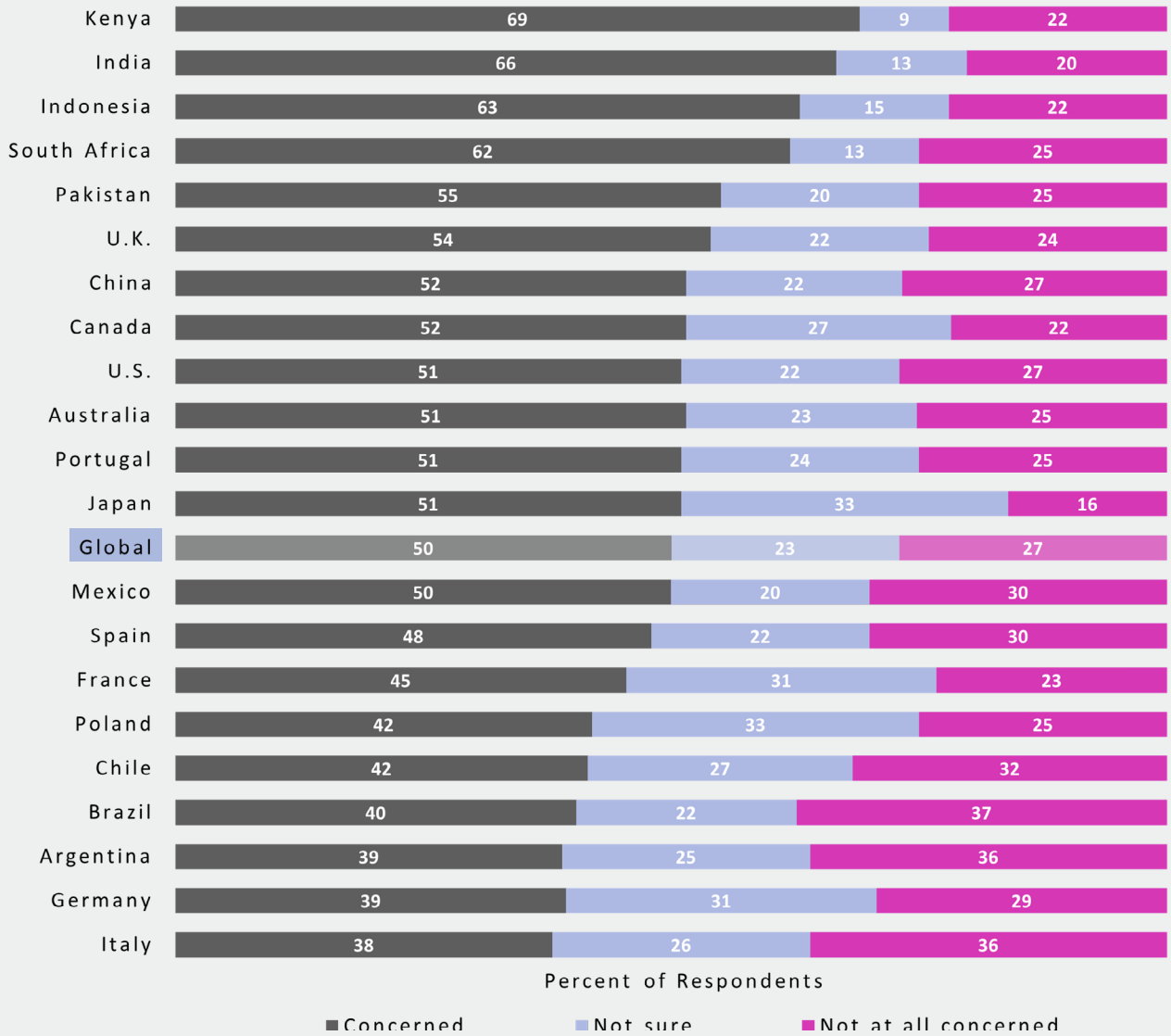


Threat of AI to human existence

Half of global respondents are worried that AI could eventually pose a threat to human existence. Kenyans are the most likely to be concerned (69%), but many respondents in India, Indonesia and South Africa are also concerned (over 60%). Brazilians, Argentinians and Italians demonstrate the least concern (37%, 36% and 36% not at all concerned, respectively).

14.6 Worry about AI as a threat to human existence (%)

How worried are you that machines with AI could eventually pose a threat to the existence of the human race?



About

This project has been made possible by funding from the Schwartz Reisman Institute for Technology and Society and the Munk School of Global Affairs & Public Policy at the University of Toronto.

About the Schwartz Reisman Institute for Technology and Society

Located at the University of Toronto, the Schwartz Reisman Institute for Technology and Society's (SRI) mission is to deepen knowledge of technologies, societies, and what it means to be human by integrating research across traditional boundaries and building human-centred solutions that really make a difference. The integrative research SRI conducts rethinks technology's role in society, the contemporary needs of human communities, and the systems that govern them. SRI is investigating how best to align technology with human values and deploy it accordingly. The human-centred solutions SRI builds are actionable and practical, highlighting the potential of emerging technologies to serve the public good while protecting citizens and societies from their misuse. SRI's mission is to make sure powerful technologies truly make the world a better place—for everyone.

About PEARL

The Policy, Elections & Representation Lab (PEARL) at the Munk School of Global Affairs and Public Policy at the University of Toronto investigates key questions related to political decision-making, representation, the societal and political implications of COVID-19 and the impact of technology on governance. Led by Professor Peter Loewen, Director of the Munk School of Global Affairs and Public Policy, Associate Director of the Schwartz Reisman Institute for Technology and Society, and an award-winning political scientist and administrator, PEARL team members use empirical methods based primarily on survey data, experimental research, and social media data, to understand how society and politics are shaped by attitudes and behaviours. Their work has been published in leading academic journals, featured by the media, and used by a wide range of stakeholders, including policymakers around the world.

GLOBAL PUBLIC OPINION ON ARTIFICIAL INTELLIGENCE (GPO-AI)

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