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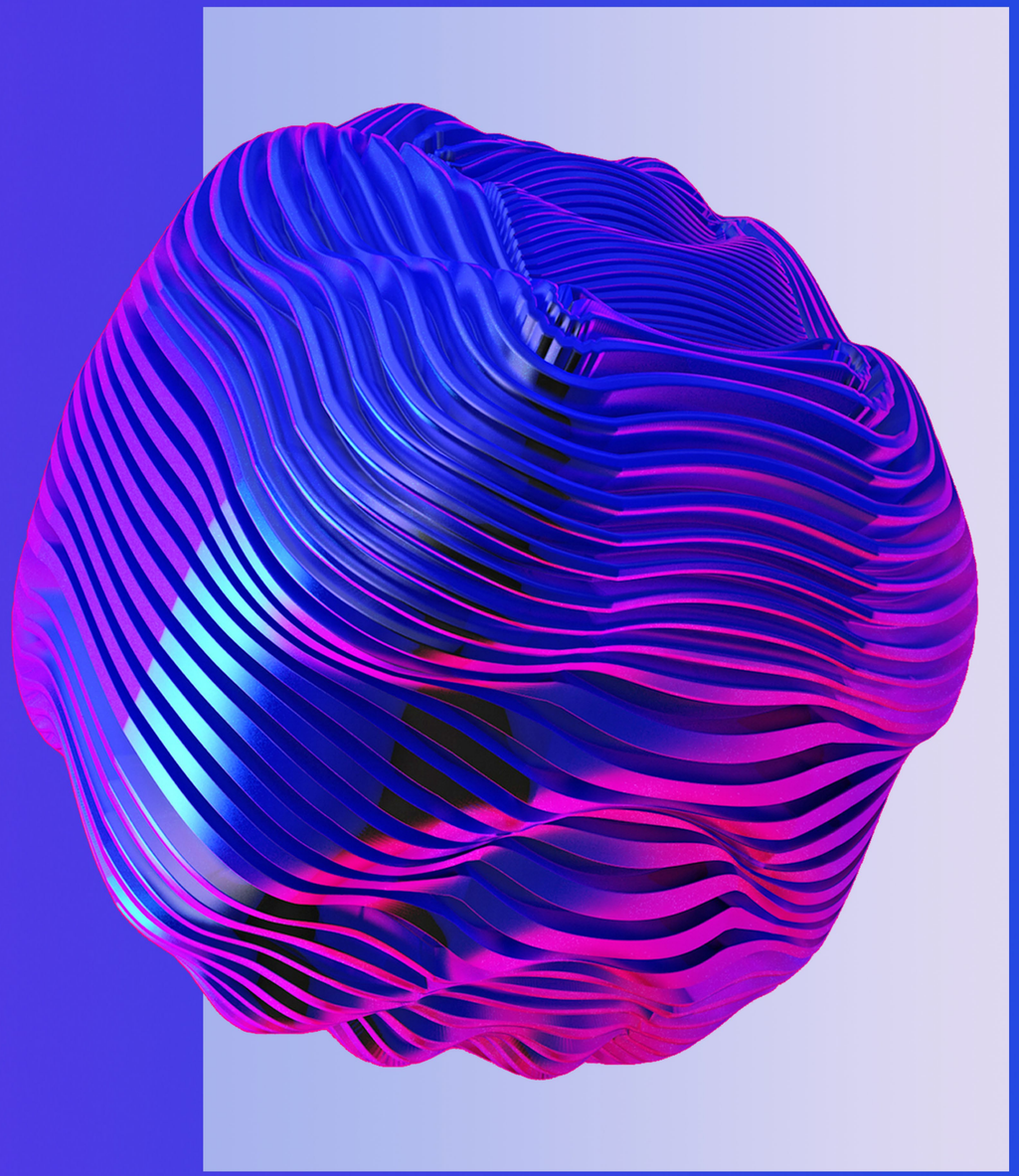
Trust in artificial intelligence

2023 Global study on the shifting public perceptions of AI.



Global executive summary
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Citation

Gillespie, N., Lockey, S., Curtis, C., Pool, J., & Akbari, A. (2023). ***Trust in Artificial Intelligence**: A Global Study.*
The University of Queensland and KPMG Australia. doi: 10.14264/00d3c94

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Acknowledgements

We are grateful for the insightful input, expertise and feedback on this research provided by Dr Ian Opperman, Rossana Bianchi, Professor Shazia Sadiq, Mike Richmond, and Dr Morteza Namvar, and members of the Trust, Ethics and Governance Alliance at The University of Queensland, particularly Dr Natalie Smith, Associate Professor Martin Edwards, Dr Shannon Colville and Alex Macdade.

Funding

This research was supported by an Australian Government Research Support Package grant provided to The University of Queensland AI Collaboratory, and by the KPMG Chair in Trust grant (ID 2018001776).

About this report

This Executive Summary is an extract from *Trust in Artificial Intelligence: A Global Study.*

Foreword

In 2020 The University of Queensland and KPMG Australia conducted the first survey into public trust of AI, expanding the study in 2021 to include the US, the UK, Germany and Canada to provide multi-country insights. The findings of these reports revealed low levels of trust and awareness of AI coupled with insights on the practices and principles the public expect organizations to use when designing and deploying AI.

To deliver practical advice for organizations looking to use AI systems to create long-term value, the report *Achieving trustworthy AI: A model for trustworthy artificial intelligence* mapped out an integrated, organization-wide approach. The report found that while the benefits, challenges, risks and opportunities that AI offers differ from one industry to another, there are a common set of design and governance principles and practices that support trustworthy AI. The model has been adopted and referenced widely across private and public sectors around the world.

Fast forward to 2023 — the tipping point for AI — and the case for an evidence-based pathway for designing and deploying trustworthy AI has escalated. The rapid trajectory of generative AI has put responsible design and deployment of AI firmly on the agenda of governments, legislators, businesses, NGOs and citizens globally.

In recognition of the need for a globally coordinated approach to regulation and governance of AI, the research was expanded to 17 countries considered leaders in AI activity and readiness in their regions. *Trust in artificial intelligence: A global study 2023* provides comprehensive global insights into the drivers of trust, the perceived risks and benefits of AI use, community expectations of governance of AI and who is trusted to develop, use and govern AI.

This report, *Trust in artificial intelligence: 2023 global study on the shifting public perceptions of AI*, highlights key findings from the full global study and provides individual country snapshots which should be instructive to those involved in leading, creating or governing AI systems. Importantly, highlighted are four critical pathways for policymakers, standards setters, governments, businesses and NGOs to consider as they navigate the trust challenges in AI development and deployment.

Harnessing AI's economic and societal benefits while managing the risks is an opportunity of our time. This report shares evidence-backed insights and recommendations for the responsible stewardship of AI in business, government and society. It welcomes the opportunity to support you on your journey to harness the value-creation potential of AI in a responsible and trusted way.

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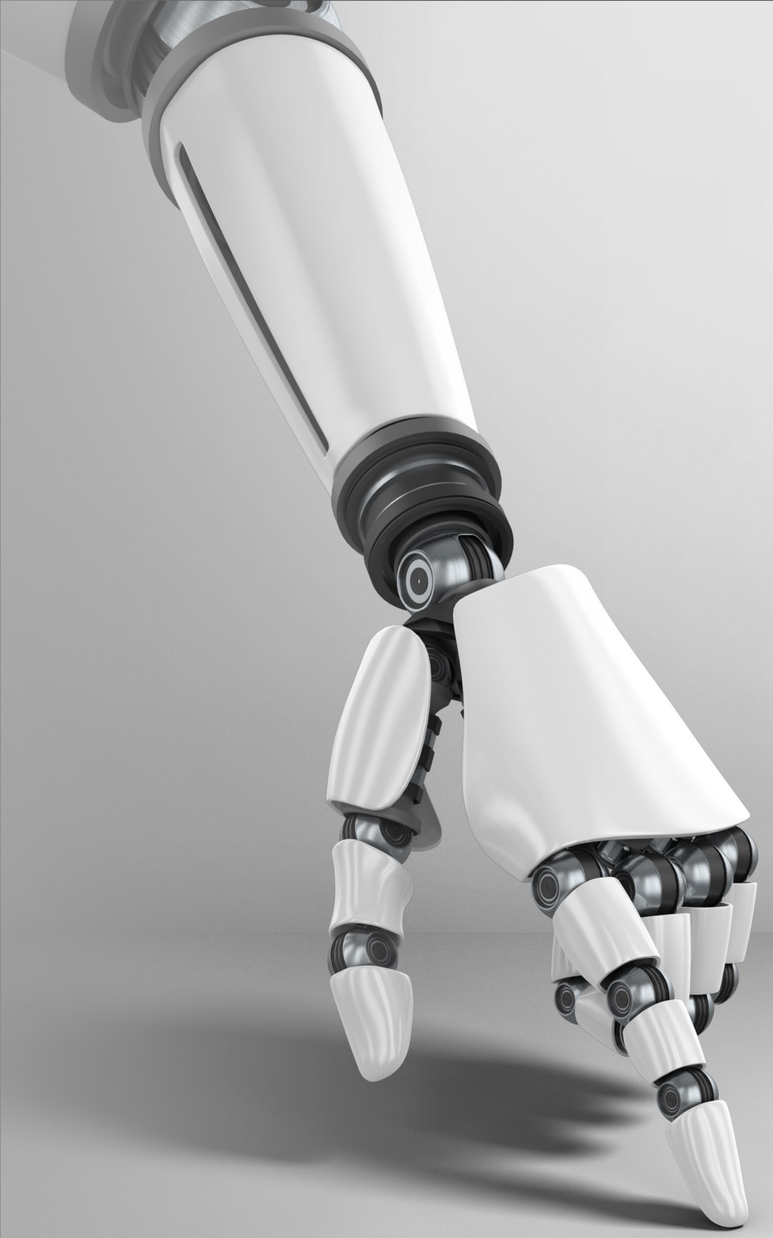

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Introduction

Artificial Intelligence (AI) has become a ubiquitous part of everyday life and work. AI is transforming the way work is done and how services are delivered. Given its potential and realized benefits for organizations, employees and society, interest in AI continues to grow. Organizations are leveraging the remarkable power of AI to help improve data-based predictions, optimize products and services, augment innovation, enhance productivity and efficiency and lower costs.

However, AI adoption also poses risks and challenges, raising concerns about whether AI use today is truly trustworthy. These concerns have been fueled by high-profile cases of AI use that were biased, discriminatory, manipulative, unlawful or in violation of human rights. Realizing the potential benefits of AI, and a return on investment, requires a clear and sustained focus on maintaining the public's trust. To drive adoption, people need to be confident that AI is being developed and used in a responsible and trustworthy manner.

This research is the first to take a deep dive examining public trust and attitudes toward the use of AI, and expectations regarding management and governance of AI across the globe. In so doing, it identifies six shifting public perceptions of AI.

More than 17,000 people from 17 countries covering all global regions were surveyed: Australia, Brazil, Canada, China, Estonia, Finland, France, Germany, India, Israel, Japan, the Netherlands, Singapore, South Africa, South Korea, the UK and the US. These countries are leaders in AI activity and readiness. Each country sample is nationally representative of the population based on age, gender and regional distribution.

Survey respondents were asked about trust and attitudes towards AI systems in general, as well as AI use in the context of four application domains where AI is rapidly being deployed and proliferating: in healthcare, public safety and security, human resources and consumer engagement/ recommender applications.

The research provides detailed and timely global insights into the public's trust and acceptance of AI systems. It looks at who is trusted to develop, use and govern AI; the perceived benefits and risks of AI use; community expectations for AI development, regulation and governance; and how organizations can foster and support trust in AI. It also sheds light on how people feel about the use of AI at work, their current understanding and awareness of AI, and the key drivers of trust in AI systems.

Shifting public perceptions of AI

AI trust and acceptance: People are wary of AI and trust depends on the AI application.

Potential AI benefits and risks: Perceived benefits don't outweigh the risks.

Who's trusted to develop and govern AI: Universities and defense organizations are trusted the most.

Responsible AI: Organizations using AI are expected to uphold high standards and be better regulated.

AI in the workplace: Most are comfortable with AI at work but want humans to retain control.

AI IQ: Understanding of AI is low.

Global key findings

AI trust and acceptance

- **Three in five** (61 percent) are wary about trusting AI systems.
- **67 percent** report low to moderate acceptance of AI.
- AI use in human resources is the **least trusted** and accepted, while AI use in healthcare is the **most trusted** and accepted.

Potential AI benefits and risk

- **85 percent** believe AI results in a range of benefits.
- **Yet only half** of respondents believe the benefits of AI outweigh the risks.
- **Top concern** is cybersecurity risk at 84 percent.

Who is trusted to develop and govern AI?

- **76 to 82 percent** have confidence in national universities, research institutions and defense organizations to develop, use and govern AI in the best interest of the public.
- **One-third** of respondents lack confidence in government and commercial organizations to develop, use and govern AI.

Responsible AI

- **97 percent** strongly endorse the principles for trustworthy AI.
- **Three in four** would be more willing to trust an AI system when assurance mechanisms are in place.
- **71 percent** expect AI to be regulated.

AI in the workplace

- **About half** are willing to trust AI at work.
- **Most** people are uncomfortable with or unsure about AI use for HR and people management.
- **Two in five** believe AI will replace jobs in their area of work.

AI IQ

- **Half** of respondents feel they don't understand AI or when and how it's used.
- **45 percent** don't know AI is used in social media.
- **82 percent** want to know more about AI.

AI attitudes vary

- **Younger generations, the university educated and managers** are more trusting, accepting and positive about AI.
- **People in emerging economies** are more trusting, accepting and positive about AI than people in other countries.

1 AI trust and acceptance

Most people are wary about trusting AI systems and have low or moderate acceptance of AI. Trust and acceptance depend on the AI application.

Public trust is vital for AI's continued acceptance. If AI systems don't prove trustworthy, widespread adoption will likely suffer and potential social and economic benefits won't be fully realized.

So, to what extent do people trust AI systems?

Across countries, three out of five people (61 percent) are wary about trusting AI, reporting either ambivalence or an unwillingness to trust. Trust is particularly low in Finland and Japan, where fewer than a quarter of people trust AI. People in Brazil, India, China and South Africa (BICS[1]) have the highest levels of trust, with most people trusting AI systems.

People have more faith in AI to produce accurate and reliable output and provide helpful services but question the safety, security and fairness of AI and the extent to which it upholds privacy rights.

Trust depends on the specific application or use case. Of the applications we examined, people are generally less trusting and accepting of AI use in HR, for example to aid hiring or promotion decisions, and more trusting of AI use in healthcare, for example aiding medical diagnosis and treatment where there is a direct benefit. People are generally more willing to rely on, than share, information when it comes to AI, particularly with recommender systems for personalized news, social media and product recommendations, and security applications that support public safety and security decisions.

Overall, two-thirds of people surveyed feel optimistic about AI use while about half voice concerns. As optimism and excitement dominate in many countries, particularly the BICS countries, fear and worry are dominant among people in Australia, Canada, France and Japan, with people in France the most fearful, worried or opposed to AI.

Key findings

3 in 5 (61 percent) are wary about trusting AI systems.

39% are willing to trust AI systems.

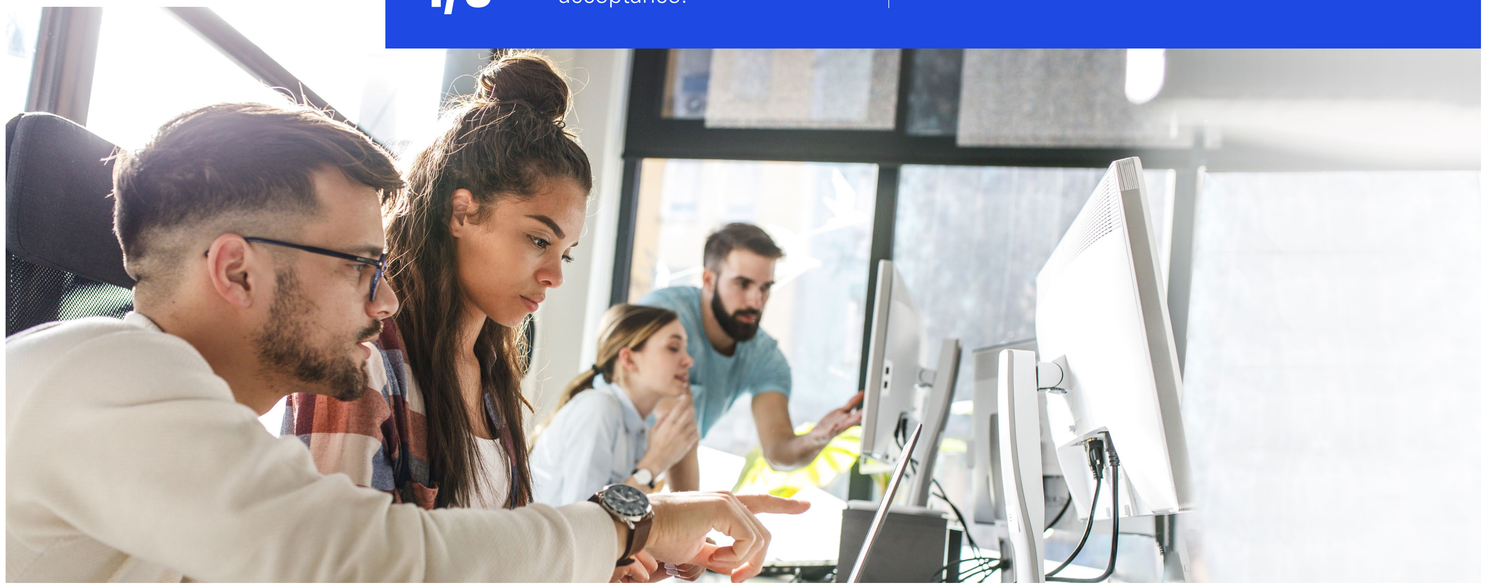
67% report low to moderate acceptance of AI.

1/3 report high acceptance.

2/3 feel optimistic, yet about **half** feel worried.

Least trusted
AI use is in human resources.

Most trusted
AI use is in healthcare.



[1] BRICS is the acronym used to describe the five major emerging economies of Brazil, Russia, India, China and South Africa. Russia was not included in the sampling and therefore use the acronym BICS in this report.

2 Potential AI benefits and risks

People recognize AI's many potential benefits, but only half believe the benefits outweigh the risks. People perceive AI risks in a similar way across countries, with cybersecurity rated as the top risk globally.

While the potential benefits and promise of AI are undeniable, so are the risks and challenges. These include the risk of codifying and reinforcing unfair biases, infringing on human rights such as privacy, spreading fake online content, deskilling and technological unemployment, and risks stemming from mass surveillance technologies, critical AI failures and autonomous weapons. Even where AI is developed to help people or enhance cybersecurity, there's the risk it can be used maliciously, including in cyberattacks. These issues are raising questions about AI trustworthiness and governance.[2]

Public wariness and ambivalence towards AI can be partly explained by mixed views regarding the benefits and risks. Most people (85 percent) believe AI has diverse benefits and that 'process' benefits — such as improved efficiency, innovation, effectiveness, resource utilization and reduced costs — are greater than the 'people' benefits of enhanced decision-making and outcomes.

However, on average, only one in two people believe the benefits of AI outweigh the risks. People in western countries and Japan are particularly unconvinced that the benefits outweigh the risks, while most people in the BICS countries and Singapore believe the benefits outweigh the risks.

There is considerable consistency across countries in how the risks of AI are perceived. Just under three-quarters (73 percent) of people surveyed globally are concerned about AI's potential risks. These risks include cybersecurity and privacy breaches, manipulation and harmful use, loss of jobs and deskilling, system failure, the erosion of human rights and inaccurate or biased outcomes.

Overall, cybersecurity risk is the leading concern globally and AI bias is the lowest. Job loss due to automation is also a top concern in India and South Africa, and system failure ranks as a top concern in Japan, potentially reflecting their relatively heavy dependence on smart technology.

These findings reinforce the critical importance of protecting data and privacy to secure and preserve trust, and the need to support global approaches and international standards for managing and mitigating AI risks.

Key findings

61% believe the social impact of AI is uncertain.

85% believe AI results in a range of benefits, with process benefits being greater.

Half believe the benefits of AI outweigh the risks.

About 3/4 (73 percent) report concerns about AI's potential risks.

Risks of AI are viewed in a comparable way across countries.

Top concern is cybersecurity risks (84 percent).

Lowest concern is AI bias (58 percent).

[2] OECD (2019). *Artificial Intelligence in Society.*

3

Who's trusted to develop and govern AI

People are most confident in universities and defense organizations to develop, use and govern AI and they are least confident in government and commercial organizations.

People have the most confidence in national universities and research institutions, as well as defense organizations, to develop, use and govern AI in the public interest (76 to 82 percent confident). In contrast, they have the least confidence in governments and commercial organizations to do this. A third of people lack confidence in government and commercial organizations to develop, use and regulate AI. This is problematic given the increasing scope with which governments and commercial organizations use AI, and the public's expectation that these entities will responsibly govern and regulate AI use. An implication is that governments and businesses can partner with more-trusted entities on AI use and governance.

There are significant differences across countries regarding public trust in their government to use and govern AI, with about half of people lacking confidence in South Africa, Japan, the UK and the US. In contrast, the majority in China, India and Singapore have high confidence in their government. This pattern mirrors people's general trust in their governments. There was a strong association between people's general trust in government, commercial organizations and other institutions and their confidence in these entities to use and govern AI. These findings suggest that taking action to strengthen trust in institutions generally is an important foundation for trust in specific AI.

Key findings

76 to 82%
have confidence in national universities, research institutions and defense organizations to develop, use and govern AI in the public interest.

1/3 **say they have no or low confidence** in government and commercial organizations to develop, use and govern AI.

People in China, India and Singapore have confidence in their governments to develop, use and govern AI.

71% report feeling confident in technology companies to develop and use AI.

Younger generations, the university educated and managers are more confident in entities to develop, use and govern AI.

4 Responsible AI

There is strong global endorsement for principles that define trustworthy AI. Trust is contingent on assuring such principles are in place. People expect AI to be regulated with external, independent oversight — and they view current regulations and safeguards as inadequate.

The survey findings show that trustworthy AI principles originally proposed by the European Commission[3] are viewed globally as crucial for trust, with data privacy, security and governance deemed most important in all countries.[4]

Respondents expect organizations to uphold high standards for all AI applications we examined. Organizations can directly build AI trust and acceptance by implementing assurance mechanisms that demonstrate AI principles are being upheld. Three out of four people would be more willing to trust AI when assurance mechanisms signal ethical and responsible use, such as monitoring system accuracy and reliability, independent AI ethics reviews, AI ethics certifications, and standards and codes of conduct. These mechanisms are particularly important given the current reliance on industry regulation and governance in many jurisdictions.

Most people (71 percent) expect AI to be regulated. Except for India, the majority in other countries see regulation as necessary — not surprising given that most people (61 percent) believe AI's long-term impact on society remains uncertain. People broadly support multiple forms of regulation, including regulation by government and regulators, a dedicated independent AI regulator, and industry-based regulation, with general agreement on the need for external, independent oversight.

Only two in five respondents believe current regulations and safeguards make AI use safe. This shows public dissatisfaction with AI regulation and is problematic given the strong relationship between current safeguards and trust in AI demonstrated by our modeling. This highlights the importance of strengthening and communicating the regulatory and legal framework governing AI and data privacy.

There are, however, substantial country differences. People in India and China are most likely to believe appropriate safeguards are in place (74 to 80 percent agree), followed by about half in Brazil and Singapore. Those in Japan and South Korea are the least convinced (13 to 17 percent agree), as are the majority in western countries.

Key findings

Almost all people (96–99 percent) across countries endorse the principles for trustworthy AI.

Data privacy, security and governance are viewed as most important to AI trust.

3/4 say they would be more willing to trust AI when assurance mechanisms are in place.

71% expect AI to be regulated.

2 in 5 believe current regulations, laws and safeguards are sufficient to make AI use safe.

61% believe the societal impact of AI is uncertain.

[3] European Commission (2019). *Ethical guidelines for trustworthy AI.*

[4] Eight Trustworthy AI principles were examined, including Data privacy, security and governance; Technical performance, accuracy and robustness; Fairness, non-discrimination and diversity; Human agency and oversight; Transparency and explainable; Accountability and contestability; Risk and impact mitigation; AI literacy support.

5 AI in the workplace

Most people are comfortable using AI to augment work and inform managerial decision-making but want humans to retain control.

Most people are comfortable using AI at work to augment and automate tasks but are less comfortable when AI is focused on them as employees, for example to monitor and evaluate them at work or to support recruitment by HR. On average, half of respondents are willing to trust AI at work and rely on its output. People in Australia, Canada, France and Germany are the least comfortable using AI at work, while those in the BICS countries and Singapore are the most comfortable.

Most people view AI use in managerial decision-making as acceptable and actually prefer AI involvement to sole human decision-making. However, the preferred option is either a 25/75 percent or 50/50 percent AI-to-human collaboration ratio, with humans retaining most or equal control. This indicates a clear preference for AI to be used as a decision aid, and a lack of support for fully automated AI decision-making at work.

While about half believe AI will enhance their competence and autonomy at work, fewer than one in three people believe AI will create more jobs than it will eliminate. However, most managers believe the opposite — that AI will create jobs. This reflects a broader trend of managers being more comfortable, trusting and supportive of AI use at work than other employees — with manual workers being the least comfortable and trusting of AI at work. Given that managers are typically the drivers of AI adoption in organizations, these differing views may cause tensions in implementing AI at work.

A minority of people in western countries, Japan and South Korea report that their employer invests in AI adoption, recognizes efforts to integrate AI, or supports responsible AI use. This stands in contrast to a majority of people in the BICS countries and Singapore.

Key findings

1/2 of respondents report using AI at work.

About 1/2 are willing to trust AI at work.

45% view collaboration that is **75% human** and **25% AI** for decision-making as most acceptable.

More than 1/2 are comfortable with AI use to augment and automate tasks.

Many are uncomfortable with, or unsure about, AI use for HR and people management.

About 1/3 believe AI will create more jobs than it will eliminate.

6 AI IQ

People want to learn more about AI but currently have a low understanding. Those who understand AI better are more likely to trust it and perceive greater benefits.

While 82 percent of people are aware of AI, one in two say they don't understand AI or when and how it's used. AI understanding is highest in China, India, South Korea and Singapore. Two out of five people are unaware that AI enables the common applications they use. For example, even though 87 percent of people use social media, 45 percent don't know it uses AI.

People who better understand AI are more likely to trust it and perceive greater benefits. This suggests that understanding AI sets a foundation for trust. Most people across all countries (82 percent) want to know more about AI. Considered together, these findings suggest a strong need and appetite for public education on AI.

Compared to older generations, those without a university education and non-managers, today's younger generations, the university educated and managers have greater knowledge of AI, can better identify when AI is used, and have a greater interest in learning about AI. They also show a consistent and distinctly more-positive orientation towards AI across the findings. For example, they:

- Are more trusting and accepting of AI, including at work, and are more likely to use AI;
- Perceive more benefits of AI but remain the same as other groups in perception of AI risks;
- Are more likely to believe AI will create jobs but also more aware that AI can perform key aspects of their work;
- Are more confident in entities to develop, use and govern AI, and more likely to believe that current safeguards are sufficient.

Key findings

4 in 5 are aware of AI.

Half say they don't understand AI or when and how it's used.

45% don't know AI is used in social media.

2 in 5 are unaware that AI enables common applications they use.

82% want to know more about AI.

How can AI become more accepted?

Trust is central to the acceptance of AI and is influenced by four key drivers.

The survey analysis demonstrates that trust is critical to AI acceptance and adoption. Through modeling, four distinct pathways to trust have been identified, representing key drivers that influence trust in AI and that is expected to strengthen responsible AI use. The pathways are *institutional*, *motivational*, *uncertainty reduction* and *knowledge*. Of these significant and complementary drivers, the *institutional* pathway had the strongest influence on trust, followed by the *motivational* pathway.

01

The institutional pathway

Reflects the beliefs about the adequacy of current safeguards, regulations and laws to make AI use safe, and confidence in government and commercial organizations to develop, use and govern AI.

- To meet community expectations, there is a need to strengthen the current regulatory and legal frameworks governing AI use.
- Governments, technology providers and commercial organizations have a key role in strengthening public trust and confidence as AI use proliferates.
- Given that the public has the highest confidence in universities and research organizations to develop, use and govern AI systems, a potential approach is for business and government to partner with these organizations around AI initiatives.

02

The motivational pathway

Reflects the need to demonstrate the potential benefits of AI use to motivate trust.

- Modeling revealed that an important pathway for strengthening and preserving trust comes from demonstrating AI's tangible benefits.
- This highlights the importance of human-centered AI design with a clear purpose at the outset of AI projects and co-designing AI-enabled services and products with key stakeholders and end-users.
- An integrated approach is required — augmenting benefits while proactively mitigating risks. Communications and public-awareness initiatives will likely be helpful to ensure that people are aware of the public benefits of AI-enabled services and products.

03

The uncertainty-reduction pathway

Reflects the need to address concerns about AI risks.

- Businesses operating in multiple markets and geographies can anticipate a common set of risks and therefore use similar AI risk strategies.
- There's a need for global collaboration on AI governance and international standards to mitigate AI risks, support responsible use and protect personal data and privacy from cybercrime.
- A key trust-enhancing practice is retaining human involvement and oversight in AI decisions that impact people. While full automation may maximize efficiency and cost reduction, it can undermine trust and acceptance. Balance is required.

04

The knowledge pathway

Reflects people's understanding of AI use and efficacy in using technology.

- While the public generally has a low understanding of AI, there's also wide interest in learning more about AI as its use soars. Public education is needed.
- But a one-size-fits-all approach isn't the answer. Younger people, the university educated and managers will often be more aware and accepting of AI than the general public.
- Public education should play a role in informing people of the potential risks and benefits, as well as methods for safe and responsible use. Close collaboration is required between governments, universities and businesses to enhance public and consumer literacy and understanding of data and technology use.

Conclusion and implications

The findings of this global survey provide a clear overview of the current and future challenges to AI trust and acceptance, as well as opportunities to overcome today's challenges. In particular, they highlight the importance of developing adequate governance and regulatory mechanisms that safeguard people from the risks associated with AI use. The public also needs to be confident that these safeguards are enacted and that AI is designed and used in a human-centric way to help people and support their understanding.

Additionally, the findings inform four pathways for strengthening the trustworthy and responsible use of AI systems and the trusted adoption of AI in society.

These insights are relevant for informing responsible AI strategies, practices and policies within businesses, government and NGOs at a national level, as well as informing AI guidelines, standards and policy at the international and pan-governmental levels.

There's a range of resources to support organizations in embedding principles and practices of trustworthy AI into their operations and putting in place mechanisms that support stakeholder trust in the use of AI.[5] While proactively investing in these trust foundations can be time and resource intensive, this research suggests it's critical for sustained acceptance and adoption of smart technologies over time and hence a return on investment.

Given AI's rapid and widespread deployment, it is expected to be important to regularly re-examine public trust and expectations of AI systems as they evolve over time to help ensure AI use is aligned with and meeting changing public expectations.

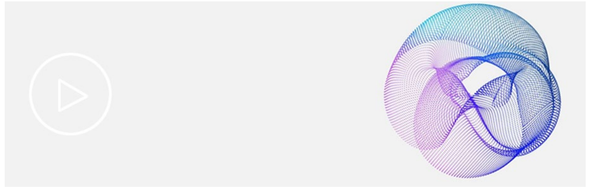
For additional insights

Trust in AI: Country insights 2023

Examine the country findings of this global study.

Trust in AI: Complete study 2023

Explore the full-length global study.



Achieving trustworthy AI: A model for trustworthy artificial intelligence

Discover an integrative model for organizations looking to design and deploy trustworthy AI systems.

[5] Gillespie, N., Curtis, C., Bianchi, R., Akbari, A., & Fentener van Vlissingen, R. (2020). *Achieving Trustworthy AI: A Model for Trustworthy Artificial Intelligence.* KPMG and The University of Queensland Report. Tabassi, E. (2023), *Artificial Intelligence Risk Management Framework (AI RMF 1.0),* NIST Trustworthy and Responsible AI, National Institute of Standards and Technology, Gaithersburg, MD, [online]. *OECD AI Policy Observatory Tools for Implementing Trustworthy AI.*.

About the survey

Data was collected in each country using representative research panels.[6] Panel members were invited to complete the survey online, with data collected between September and October 2022.

The total sample included 17,193 respondents from 17 countries. Countries were chosen based on three criteria: 1) representation across all nine global regions; 2) leadership in AI activity and readiness[7], and 3) diversity on the Responsible AI Index.[8] The sample size across countries ranged from 1,001 to 1,021 respondents.

Surveys were conducted in the native language(s) of each country, with the option to complete in English, if preferred. To help ensure question equivalence across countries, surveys were professionally translated and back translated from English to each respective language, using separate translators. See Appendix 1 of the full report for further method details.

Who completed the survey?

Country samples were nationally representative of the adult population on gender, age and regional distribution matched against official national statistics within each country. Across the total sample, the gender balance was 50 percent women, 49 percent men and 1 percent non-binary and other gender identities. The mean age was 44 years and ranged from 18 to 91 years.

Ninety percent of respondents were either currently employed (67 percent) or had prior work experience (23 percent). These respondents represented the full diversity of industries and occupational groups listed by the OECD.[9] Almost half the sample (49 percent) had a university education.

How the survey asked about AI

After asking about respondents' understanding of AI, the following definition of AI was provided.

Artificial Intelligence (AI) refers to computer systems that can perform tasks or make predictions, recommendations or decisions that usually require human intelligence. AI systems can perform these tasks and make these decisions based on objectives set by humans but without explicit human instructions (OECD, 2019).

Given that perceptions of AI can be influenced by the purpose and use case applied, survey questions asking about trust, attitudes and governance of AI systems referred to one of five AI use cases (randomly allocated): Healthcare AI (used to inform decisions about how to diagnose and treat patients); Security AI (used to inform decisions about public safety and security); Human Resource AI (used to inform decisions about hiring and promotion); Recommender AI (used to tailor services to consumers); or AI in general.

These use cases were chosen as they represent domains where AI is being rapidly deployed and is likely to be used by, or impact, many people. Before answering questions, respondents were provided with a description of the AI use case, including what it is used for, what it does and how it works.

How the data was analyzed

Statistical analyses were conducted to examine differences between countries, AI use cases and demographic groups. Where significant and meaningful differences are evident between countries, we report country-level data. Further details of the statistical procedures are discussed in Appendix 1 of the full report. Meaningful differences between groups and AI use cases are also reported.

[6] Data was collected from research panels sourced by Qualtrics, a global leader in survey panel provision.

[7] The research focused primarily on the 2021 *Government AI Readiness Index*.

[8] Sub-index of the *Government AI Readiness Index* produced by Oxford Insights.

[9] Occupational groupings sourced from OECD International Standard Classifications of Occupations.

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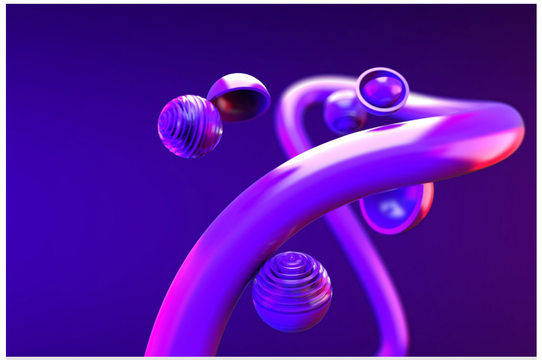

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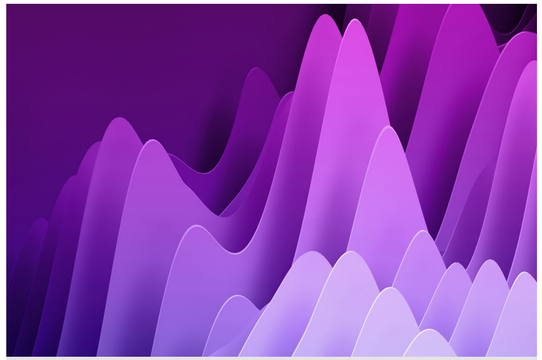

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Publication name: Trust in artificial intelligence | Publication number: 138784-G | Publication date: July 2023