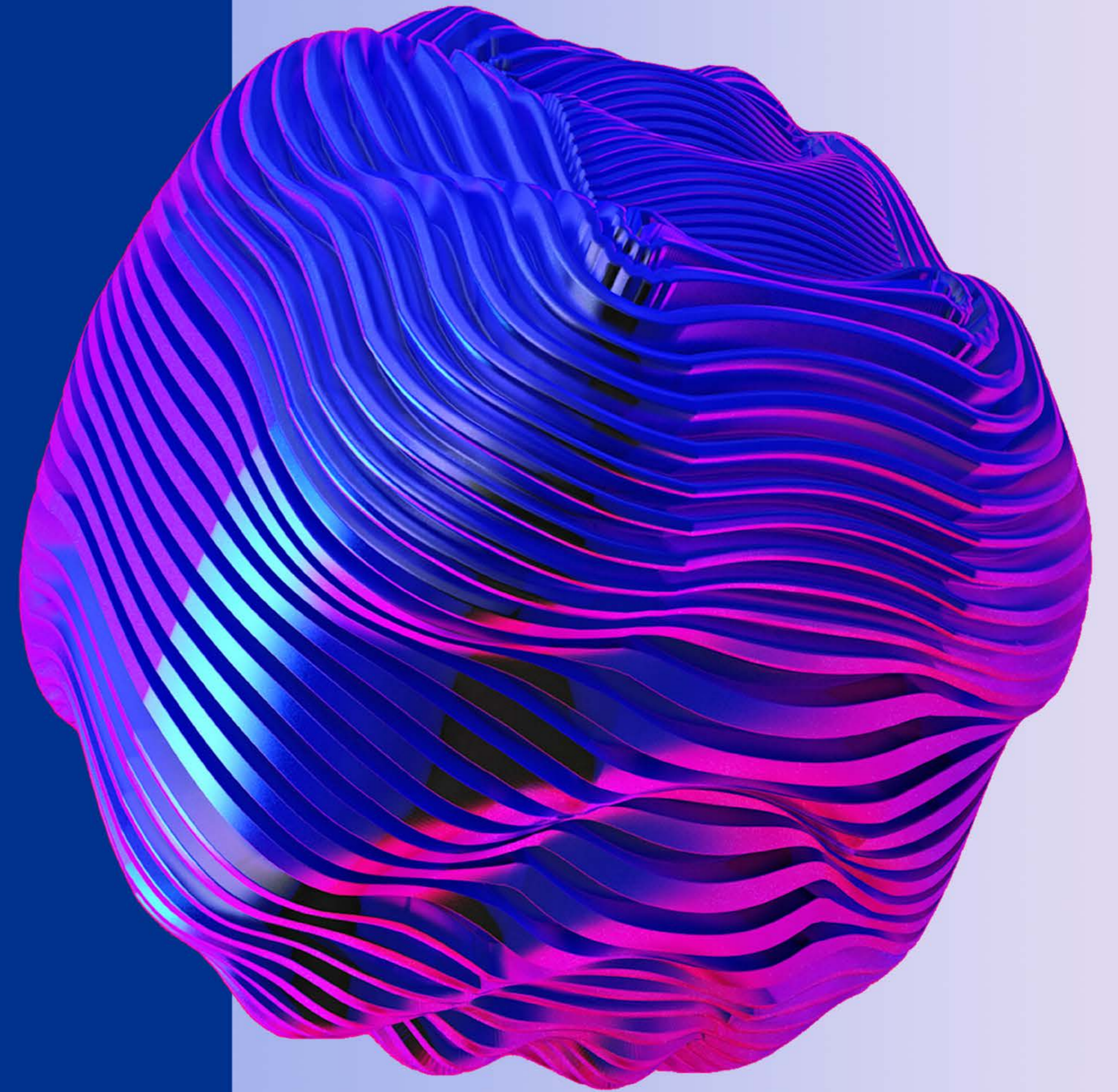# Trust in artificial intelligence

Country insights on shifting public perceptions of AI

Country findings
KPMG International | kpmg.com
The University of Queensland | uq.edu.au

Citation

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About this report

The country findings that make up this report are data extracts extract from *Trust in Artificial Intelligence*: *A Global Study.*

Explore the country findings on the shifting public perceptions of AI

Australia

Australians have broadly ambivalent attitudes about AI, tending to rank alongside Western countries such as Canada, the US and the UK. Australians have the lowest benefit perceptions of all countries surveyed, with only the Japanese expressing less interest in learning more about AI.

AI trust and acceptance

- **34 percent** are willing to trust AI, with **66 percent** unwilling to trust AI or are unsure.
- **55 percent** accept AI, one of the lowest percentages across countries. Only Canada, the Netherlands and Japan rank lower.
- Australians express ambivalent emotions about AI. While **half** (51 percent) are optimistic and **42 percent** are excited, **almost half** are also fearful (49 percent) and worried (47 percent).

Potential AI benefits and risks

- **70 percent** believe AI will deliver a range of benefits. Australians ranked the benefits of AI lower than people in all other countries surveyed.
- **81 percent** are concerned about various AI-related risks, with cybersecurity risk being the top concern (84 percent), followed by job loss due to automation (78 percent).
- **Only 44 percent** think the benefits of AI outweigh the risks.

Who is trusted to develop and govern AI?

- Australians are **most confident** in national universities, international research organizations and defense forces (79-81 percent moderate to high confidence) to develop and govern AI in the public's best interests.
- However, a **significant minority** have no or low confidence in commercial organizations (41 percent) or technology companies (37 percent) to develop and govern AI.

Responsible AI

- **71 percent** believe the impact of AI on society is uncertain and unpredictable.
- **70 percent** report that AI regulation is necessary, with most agreeing that AI should be regulated by government and/ or existing regulators or a dedicated AI regulator (both 72 percent).
- **35 percent** feel current regulations, laws and safeguards are sufficient to make AI use safe.
- **95 percent** view the principles and practices of trustworthy AI as important for their trust in AI systems.

AI in the workplace

- **40 percent** are willing to trust AI at work.
- **53 percent** disagree that AI will create more jobs than it will eliminate.
- **39 percent** agree that AI will replace jobs in their work area.

AI IQ

- **59 percent** report a low understanding of AI and when it's being used, with **only 65 percent** indicating they're interested in learning more about AI. This is the second lowest percentage of the countries surveyed; only Japan ranks lower.
- **63 percent** use common applications containing AI, and a similar percentage (57 percent) know that AI is used in those applications.

Brazil

Brazilians have among the most positive attitudes toward AI of all the countries surveyed. They usually rank behind only India and China on key measures, often alongside South Africa. While Brazilians tend to have positive attitudes toward AI, it is notable that — compared to many other countries surveyed — they have comparatively low knowledge and awareness of AI. On the other hand, Brazilians are among the most interested in learning more about AI.

AI trust and acceptance

- **Over half** are willing to trust AI (56 percent), with **44 percent** being unwilling or unsure about trusting AI.
- **87 percent** accept AI.
- Most Brazilians express positive emotions towards AI, with **82 percent** feeling optimistic and **81 percent** excited. **Just under half** report feeling fearful (49 percent) and worried (47 percent).

Potential AI benefits and risks

- **Almost all** (93 percent) believe AI will have a range of benefits, behind only India and China in the entire sample.
- **75 percent** are also concerned about various risks.
- A clear **majority** (71 percent) of Brazilians believe the benefits of AI outweigh the risks, ranking Brazil behind only China.

Who is trusted to develop and govern AI?

- Most Brazilians have **confidence in all entities** to develop and regulate AI in the public's best interests (government: 70 percent moderate-high confidence, international research organizations: 93 percent).
- It's interesting to note, however, that almost a third (30 percent) have no to low confidence in the government.[1]

Responsible AI

- **55 percent** think the impact of AI on society is uncertain and unpredictable; the second lowest percentage in the sample.
- **70 percent** report that AI regulation is necessary, with most Brazilians supporting all forms of regulation (dedicated AI regulator: 66 percent, industry: 78 percent).
- **98 percent** view the principles and practices of trustworthy AI as important for their trust in AI systems.
- **Around half** (52 percent) believe current safeguards are sufficient to make AI use safe, placing Brazil fourth behind India, China and Singapore on this metric.

AI in the workplace

- **70 percent** are willing to trust AI at work, behind only India and China.
- Brazilians are largely split on whether AI will create more jobs than it will eliminate, with **48 percent** agreeing, **41 percent** disagreeing and **11 percent** being unsure.
- **42 percent** agree that AI will replace jobs in their work area.

AI IQ

- **53 percent** report low understanding of AI, a lower understanding than the other BICS countries.
- **90 percent** are interested in learning more about AI.
- **82 percent** use common applications containing AI — they're the most common users in the sample, yet **66 percent** are aware that AI is used in those applications.

[1] Note that data was collected before the 2022 Brazilian election and subsequent change in government.

Canada

Canadians are largely wary of AI, with only a third willing to trust AI. Acceptance of AI is the lowest of all the Western countries surveyed. This may be partly attributed to their lack of belief that current safeguards are sufficient — the lowest of all Western countries we surveyed.

AI trust and acceptance

- **Only 32 percent** are willing to trust AI, with **68 percent** unwilling or unsure.
- **56 percent** accept AI, one of the lowest percentages across countries. Only the Netherlands and Japan rank lower.
- While **55 percent** are optimistic about AI, similar percentages are also worried (55 percent) and fearful (54 percent).

Potential AI benefits and risks

- **73 percent** believe AI will have a range of benefits.
- **71 percent** are concerned about various AI-related risks, with cybersecurity risk being the top concern (83 percent), followed by job loss due to automation (76 percent).
- **Only 42 percent** think the benefits of AI outweigh the risks.

Who is trusted to develop and govern AI?

- Canadians are **most confident** in their national universities, international research organizations and defense forces (79-83 percent moderate to high confidence) to develop and govern AI in the public's best interests.
- However, a **significant minority** have no or low confidence in commercial organizations (41 percent), technology companies (39 percent) and government (36 percent) to develop and govern AI.

Responsible AI

- **70 percent** feel the impact of AI on society is uncertain and unpredictable.
- **73 percent** report that AI regulation is necessary. Most agree (62-66 percent) that AI should be regulated by government and/or existing regulators, a dedicated AI regulator, and/or co-regulated by government and industry.
- **28 percent** believe current regulations, laws and safeguards are sufficient to make AI use safe. Only South Korea and Japan rank lower than Canada.
- **96 percent** view the principles and practices of trustworthy AI as important for their trust in AI systems.

AI in the workplace

- **Only 37 percent** are willing to trust AI at work.
- **56 percent** disagree that AI will create more jobs than it will eliminate, the second highest across countries.
- **37 percent** agree that AI will replace jobs in their work area.

AI IQ

- **59 percent** report a low understanding of AI and when it's being used. Almost two-thirds (74 percent) are interested in learning more about AI.
- **61 percent** use common applications containing AI, and a similar percentage (58 percent) know that AI is used in those applications.

China

China consistently appears at the top of the rankings — alongside India — in positively perceiving AI. While the Chinese are among the least likely to believe AI needs to be regulated, they express some of the highest confidence in entities to regulate AI, revealing that they are comfortable with all forms of regulation.
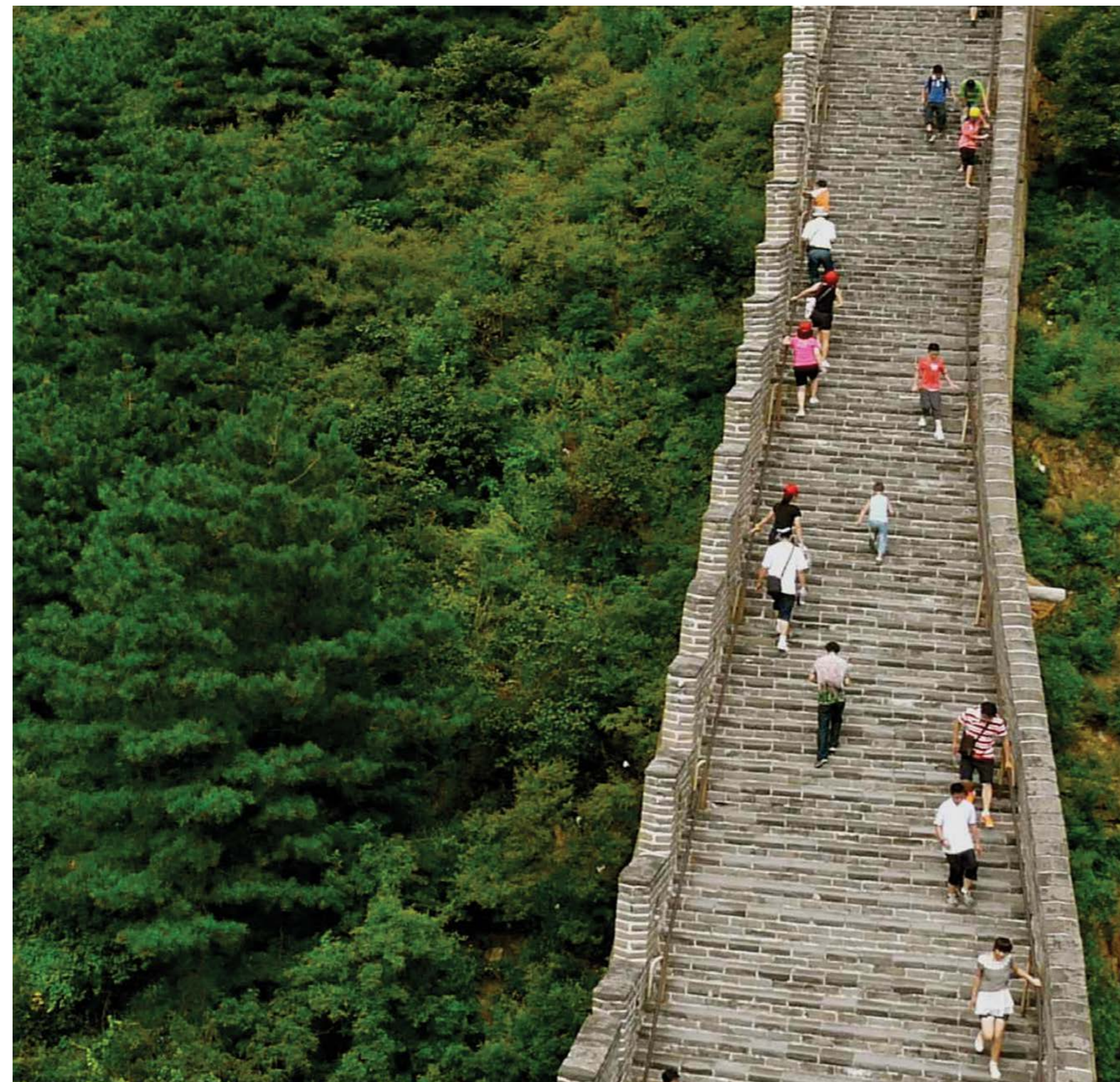
AI trust and acceptance

- **67 percent** are willing to trust AI, while **33 percent** are unwilling or unsure about trusting AI.
- **95 percent** accept AI, the highest in the sample.
- China displays the highest level of optimism and excitement towards AI, with **95 percent** and **88 percent** respectively, and most are relaxed (91percent) about AI. **A minority** are fearful (36 percent) and worried (45 percent) about AI.

Potential AI benefits and risks

- **99 percent** believe AI will have a range of benefits, the highest among the countries.
- **70 percent** are concerned about various risks, with cybersecurity (79 percent) and job loss due to automation (75 percent) being the most prominent concerns.
- **81 percent** think the benefits of AI outweigh the risks, higher than most other countries.

Who is trusted to develop and govern AI?

- **A majority** of Chinese have confidence in all entities to develop and regulate AI in the public's best interests (commercial organizations: 86 percent moderate-high confidence, the government: 99 percent).

Responsible AI

- **63 percent** feel the impact of AI on society is uncertain and unpredictable, a higher percentage than the other BICS countries.
- **56 percent** report that AI regulation is necessary — the second lowest behind India. Chinese respondents strongly supported all forms of AI regulation (industry: 78 percent, co-regulation: 88 percent).
- **74 percent** believe current regulations, laws and safeguards are sufficient to make AI use safe, the second highest percentage among the other countries.
- **99 percent** view the principles and practices of trustworthy AI as important for their trust in AI systems.

AI in the workplace

- **83 percent** are willing to trust AI at work, ranking China behind only India.
- **Only 11 percent** of Chinese disagree that AI will create more jobs than it will eliminate, which is lower than all other countries.
- **Almost half** (49 percent) agree that AI will replace jobs in their work area.

AI IQ

- China ranks highest on understanding and interest in AI, with **82 percent** indicating they understand AI and **96 percent** expressing interest in learning more about AI.
- **75 percent** use common applications containing AI, and **70 percent** know that AI is used in those applications.

Estonia

While lacking trust, Estonians express broadly positive attitudes towards AI, with most demonstrating acceptance, positive emotions and confidence in entities to develop and govern AI in the public's best interests. A majority of Estonians report a low understanding of AI. Still, they are the most frequent users of common applications that use AI, and a majority are aware that AI is used in those applications.

AI trust and acceptance

- **26 percent** are willing to trust AI, with **74 percent** being unwilling or unsure about trusting AI.
- **73 percent** accept AI, one of the highest levels of the European countries behind Germany.
- **Most** Estonians indicate optimism and excitement about AI (62-68 percent), with far fewer reporting fear or worry (33-34 percent).

Potential AI benefits and risks

- **87 percent** believe AI will have a range of benefits.
- **71 percent** are concerned about various risks, with cybersecurity (87 percent), manipulation or harmful use (76 percent) and system failure (76 percent) being the most prominent concerns.
- **42 percent** think the benefits of AI outweigh the risks.

Who is trusted to develop and govern AI?

- Estonians are **most confident** in defense forces, national universities and international research organizations (86-93 percent moderate to high confidence) to develop and govern AI in the public's best interests.
- Most Estonians are **also confident** in the government (71 percent), technology companies (70 percent) and commercial organizations (64 percent) to develop and govern AI.

Responsible AI

- **65 percent** feel the impact of AI on society is uncertain and unpredictable.
- **79 percent** report that AI regulation is necessary, with all regulatory options being accepted (a dedicated AI regulator: 66 percent, the government or existing regulators: 70 percent).
- **38 percent** believe current regulations, laws and safeguards are sufficient to make AI use safe.
- **98 percent** view the principles and practices of trustworthy AI as important for their trust in AI systems.

AI in the workplace

- **35 percent** are willing to trust AI at work.
- **Around half** (49 percent) disagree that AI will create more jobs than it will eliminate.
- **28 percent** agree that AI will replace jobs in their work area.

AI IQ

- **63 percent** report low understanding of AI, with **80 percent** interested in learning more about it.
- Estonians are among the most frequent users of common applications containing AI (71 percent), and **58 percent** know that AI is used in those applications.

Finland

While Finns are the least trusting of AI among all the countries surveyed, they have average acceptance, perceive the benefits of AI, are more likely to express positive than negative emotions about it, and are more likely (compared to most Western countries) to believe that AI will create more jobs than it will eliminate. Finns are among the most knowledgeable about AI in the entire sample. Their difference from other European countries may be attributed to their early AI strategy and investment in public education around AI.

AI trust and acceptance

- Finns are the least trusting of AI in the entire sample, with just **16 percent** being willing to trust AI and **84 percent** being unwilling or unsure about trusting AI.
- Despite this, **63 percent** accept AI, ranking Finland ahead of countries including Australia, Canada and the US.
- **Over half** feel relaxed, optimistic and excited about AI (53-62 percent), while **less than half** feel fearful or worried (31-38 percent).

Potential AI benefits and risks

- **79 percent** believe AI will have a range of benefits.
- **76 percent** are concerned about various risks — lower than most Western countries, with cybersecurity being the top-ranked concern (91 percent).
- **44 percent** think the benefits of AI outweigh the risks.

Who is trusted to develop and govern AI?

- Finns are **most confident** in defense forces, national universities and international research organizations to develop and govern AI in the public's best interests (87-90 percent moderate to high confidence).
- They're also **more confident** in government (73 percent) than commercial organizations or technology companies (60-64 percent) to develop and govern AI.

Responsible AI

- **67 percent** feel the impact of AI on society is uncertain and unpredictable.
- **78 percent** report that AI regulation is necessary. Finns prefer co-regulation, a dedicated AI regulator or regulation by government (60-64 percent).
- **25 percent** believe current regulations, laws and safeguards are sufficient to make AI use safe.
- **98 percent** view the principles and practices of trustworthy AI as important for their trust in AI systems.

AI in the workplace

- **26 percent** are willing to trust AI at work, the lowest in the sample.
- **Less than half** (47 percent) disagree that AI will create more jobs than it will eliminate, differentiating Finland from most other Western nations, where a **majority** believe this will be the case.
- **34 percent** agree that AI will replace jobs in their work area.

AI IQ

- **57 percent** report understanding AI and when it's being used, a higher percentage than other Western countries.
- **84 percent** are interested in learning more about it.
- **65 percent** use common applications containing AI, and **68 percent** know that AI is used in those applications; only China and Singapore rank higher in awareness.

France

The French are broadly like other Western countries in being wary about AI and reporting a relatively low understanding of it. Over two-thirds of French respondents are fearful of AI, the highest percentage of all countries surveyed.

AI trust and acceptance

- **31 percent** are willing to trust AI; **69 percent** are unwilling or unsure.
- **65 percent** accept AI.
- While **64 percent** are optimistic about AI, **68 percent** fear it, making the French the most fearful of AI across countries.

Potential AI benefits and risks

- **80 percent** believe AI will have a range of benefits.
- **76 percent** are concerned about various AI-related risks, a lower percentage than several of France's Western counterparts, with deskilling a more prominent concern for the French (80 percent) than most other countries — only South Korea and South Africa score higher.
- **40 percent** think the benefits of AI outweigh the risks.

Who is trusted to develop and govern AI?

- The French are **most confident** in national universities, international research organizations and defense forces (80-86 percent moderate to high confidence) to develop and govern AI in the public's best interests.
- They are **least confident** in commercial organizations developing and regulating AI, with **39 percent** expressing no or low confidence.

Responsible AI

- **59 percent** feel the impact of AI on society is uncertain and unpredictable.
- **67 percent** report that AI regulation is necessary, and more would prefer a dedicated AI regulator (64 percent), co-regulation (63 percent) or government regulation (61 percent) than industry regulation (54 percent).
- **Only 29 percent** believe current regulations, laws and safeguards are sufficient to make AI use safe.
- **96 percent** view the principles and practices of trustworthy AI as important for their trust in AI systems.

AI in the workplace

- Only **39 percent** are willing to trust AI at work.
- **51 percent** disagree that AI will create more jobs than it will eliminate.
- **37 percent** agree that AI will replace jobs in their work area.

AI IQ

- **62 percent** report a low understanding of AI and when it's being used, yet **78 percent** are interested in learning more about it.
- **60 percent** use common applications containing AI, yet **just over half** (52 percent) know that AI is used in those applications.

Germany

Germans have largely positive attitudes about AI applications, consistently ranking at or near the top of Western countries on positive metrics. However, this does not appear to translate to the use of AI at work, and while Germans suggest they have comparatively high subjective knowledge of AI, their awareness of AI use in common applications is lower than the average of the countries surveyed.

AI trust and acceptance

- **35 percent** are willing to trust AI, with **65 percent** unwilling or unsure about trusting AI.
- Germans have comparatively high acceptance of AI compared to their Western counterparts; **76 percent** accept AI.
- **72 percent** feel optimistic about AI, with a **majority** also feeling excited (58 percent). While **57 percent** feel worried about AI, **less than half** fear it (47 percent).

Potential AI benefits and risks

- **88 percent** believe AI will have a range of benefits.
- Conversely, **66 percent** are concerned about various AI-related risks, a lower percentage than several of Germany's Western counterparts.
- Germans are **less concerned** about the loss of privacy (62 percent) than those in several other Western countries.
- **42 percent** think the benefits of AI outweigh the risks.

Who is trusted to develop and govern AI?

- Germans are **most confident** in national universities, international research organizations and defense forces (77-89 percent moderate to high confidence) to develop and govern AI in the public's best interests.
- Germans are **least confident** in the government to develop and regulate AI, with **37 percent** expressing no or low confidence.

Responsible AI

- **56 percent** feel the impact of AI on society is uncertain and unpredictable, the lowest of all Western countries we surveyed.
- **65 percent** report that AI regulation is necessary, with a clear preference for regulation by a dedicated AI regulator (64 percent), compared to other regulatory options (52-55 percent).
- **39 percent** believe current regulations, laws and safeguards are sufficient to make AI use safe, a higher percentage than other Western countries.
- **98 percent** view the principles and practices of trustworthy AI as important for their trust in AI systems.

AI in the workplace

- Only **37 percent** are willing to trust AI at work.
- **52 percent** disagree that AI will create more jobs than it will eliminate.
- **34 percent** agree that AI will replace jobs in their work area.

AI IQ

- **52 percent** report a low understanding of AI and when it's being used. Germans generally report higher knowledge than those in other Western countries.
- **87 percent** are interested in learning more about AI.
- **67 percent** use common applications containing AI, yet **just over half** (52 percent) know that AI is used in those applications.

India

India often ranks alongside — and sometimes ahead of — China in having the most positive perceptions of AI. Indians are unique in that less than half believe AI needs to be regulated, with a majority thinking the appropriate safeguards are most likely already in place.

AI trust and acceptance

- **75 percent** are willing to trust AI, the highest percentage among all the countries. **Only 25 percent** are unwilling or unsure about trusting AI.
- **95 percent** accept AI.
- **90 percent** are optimistic about AI, and a **majority** are excited (92 percent) and relaxed (87 percent) about it. However, a significant portion of the population is fearful (56 percent) and worried (46 percent).

Potential AI benefits and risks

- **96 percent** believe AI will have a range of benefits.
- **67 percent** are concerned about various risks, which is lower than in most other countries. Job loss due to automation is the top-ranked concern (76 percent).
- **69 percent** think the benefits of AI outweigh the risks.

Who is trusted to develop and govern AI?

- **A majority** have confidence in all entities to develop and regulate AI in the public's best interests (technology companies: 87 percent moderate-high confidence, international research organizations: 98 percent, defense forces: 98 percent).

Responsible AI

- **58 percent** feel the impact of AI on society is uncertain and unpredictable.
- **Almost half** (47 percent) report that AI regulation is necessary, the lowest of all countries we surveyed. Indians support all forms of regulation, including co-regulation (85 percent), industry (84 percent), government and/or existing regulators (81 percent) and a dedicated AI regulator (81 percent).
- **80 percent** believe current regulations, laws and safeguards are sufficient to make AI use safe, the highest percentage in the sample.
- **99 percent** view the principles and practices of trustworthy AI as important for their trust in AI systems.

AI in the workplace

- **87 percent** are willing to trust AI at work, which is higher than all other countries.
- **Only 19 percent** disagree that AI will create more jobs than it will eliminate, the second lowest percentage in the sample.
- **68 percent** agree that AI will replace jobs in their work area, the lowest percentage among all countries.

AI IQ

- **77 percent** understand AI, which is higher than the other countries except South Korea and China.
- **91 percent** are interested in learning more about AI.
- Indians are among the most frequent users of common applications containing AI (81 percent), and **68 percent** know that AI is used in those applications.

Israel

Israelis have mainly positive attitudes about AI, often more favorable than Western countries but less so than Singapore and the BICS countries. One aspect in which Israel is very different from all other countries is the comparative lack of desire for AI to be regulated by an independent regulator.

AI trust and acceptance

- **34 percent** are willing to trust AI, yet **66 percent** are unwilling or unsure about trusting AI.
- **77 percent** accept AI, one of the highest acceptance levels outside of the BICS countries.
- **Most** Israelis express positive emotions about AI (relaxed: 66 percent, optimistic: 77 percent). **A minority** express fear or worry (42-46 percent).

Potential AI benefits and risks

- **94 percent** believe AI will have a range of benefits.
- **74 percent** are concerned about various risks, with cybersecurity (87 percent) and loss of privacy (83 percent) being the most prominent concerns.
- **53 percent** think the benefits of AI outweigh the risks, making Israel one of the few countries in the sample — alongside Singapore and the BICS countries — where a **majority** believe this to be the case.

Who is trusted to develop and govern AI?

- Israelis are **most confident** in defense forces, national universities and international research organizations to develop and govern AI in the public's best interests (81-84 percent moderate to high confidence).
- Most Israelis are **also confident** in the government (67 percent), but **just over half** (54 percent) are confident in commercial organizations.

Responsible AI

- **53 percent** feel the impact of AI on society is uncertain and unpredictable.
- **83 percent** report that AI regulation is necessary, the highest in the sample. Co-regulation is the most popular option for Israelis (72 percent), with **only half** agreeing that AI should be regulated by a dedicated AI regulator, the lowest in the sample.
- **37 percent** believe current regulations, laws and safeguards are sufficient to make AI use safe.
- **98 percent** view the principles and practices of trustworthy AI as important for their trust in AI systems.

AI in the workplace

- **Around half** (53 percent) are willing to trust AI at work — only Singapore and the BICS countries rank higher.
- **49 percent** disagree that AI will create more jobs than it will eliminate.
- **47 percent** agree that AI will replace jobs in their work area.

AI IQ

- **59 percent** report understanding AI, one of the highest percentages in the sample, with **94 percent** expressing interest in learning more about AI, placing Israel second only to China.
- **67 percent** are users of common applications containing AI, and **57 percent** know that AI is used in those applications.

Japan

Japan ranks amongst the lowest of all countries in their perceptions and understanding of AI. Japanese lack trust, acceptance and awareness, and many are not interested in learning more about AI. They don't believe there are sufficient safeguards around AI; however, a majority still perceive the benefits of AI. Negative attitudes may be linked to the Japanese cohort being the oldest in the sample.

AI trust and acceptance

- **Only 23 percent** are willing to trust AI, with **77 percent** being unwilling or unsure.
- **56 percent** accept AI; only the Netherlands ranks lower.
- More Japanese express negative emotions (worry: 55 percent, fear: 52 percent) than positive emotions (optimistic: 42 percent, excited: 40 percent). Further, **73 percent** don't feel relaxed about AI.

Potential AI benefits and risks

- **75 percent** believe AI will have a range of benefits.
- **68 percent** are concerned about various risks, with system failure being the most prominent concern (81 percent). Japan is the only country in which system failure is the top concern.
- **42 percent** think the benefits of AI outweigh the risks.

Who is trusted to develop and govern AI?

- Japanese are **most confident** in technology companies, national universities and international research organizations (77-81 percent) to develop and govern AI in the public's best interests.
- Japan ranks with South Korea, Singapore and the BICS countries in its relatively high confidence in technology companies.
- Conversely, **almost half** (47 percent) have no or low confidence in the government, and **43 percent** lack confidence in commercial organizations.

Responsible AI

- **Just over half** (52 percent) feel the impact of AI on society is uncertain and unpredictable, the second lowest in the sample.
- **77 percent** report that AI regulation is necessary. More Japanese would prefer AI to be regulated by industry (61 percent) than by government (55 percent).
- **Only 13 percent** believe current regulations, laws and safeguards are sufficient to make AI use safe, the lowest in the sample.
- **96 percent** view the principles and practices of trustworthy AI as important for their trust in AI systems.

AI in the workplace

- **31 percent** are willing to trust AI at work. While low, this is noticeably higher than the percentage willing to trust AI more broadly.
- **37 percent** disagree that AI will create more jobs than it will eliminate, with only Singapore, India and China demonstrating less disagreement.
- **21 percent** agree that AI will replace jobs in their work area, the lowest in the sample.

AI IQ

- **75 percent** report a low understanding of AI, the lowest knowledge rate among all countries surveyed.
- **Only 55 percent** are interested in learning more about AI, which is also the lowest of all countries.
- **56 percent** use common applications containing AI, and a similar percentage (53 percent) know that AI is used in those applications.

The Netherlands

Dutch respondents largely lack trust in AI, and only Japan ranks lower than the Netherlands on AI acceptance. Despite this, many believe that AI will produce benefits, while fewer have concerns about the risks of AI — however, less than half believe the benefits of AI outweigh the risks. The Dutch differ from most of their Western counterparts in their low knowledge and awareness of AI use.

AI trust and acceptance

- **29 percent** are willing to trust AI, with **71 percent** unwilling or unsure.
- **Almost half** (46 percent) have low acceptance of AI.
- Broadly, the Dutch do not express strong emotions toward AI. **48 percent** are optimistic about AI, and few express fear or worry (30-39 percent).

Potential AI benefits and risks

- **78 percent** of the Dutch believe AI will have a range of benefits.
- **68 percent** are concerned about various risks related to AI, which is lower than in most other Western countries. Cybersecurity (83 percent) and loss of privacy (73 percent) are the top two concerns.
- **40 percent** think the benefits of AI outweigh the risks.

Who is trusted to develop and govern AI?

- The Dutch are **most confident** in national universities, international research organizations and defense forces to develop and govern AI in the public's best interests (85-92 percent moderate to high confidence).
- They are **least confident** in commercial organizations to develop and regulate AI, with **37 percent** expressing no or low confidence. **31 percent** also express no or low confidence in the government.

Responsible AI

- **63 percent** feel the impact of AI on society is uncertain and unpredictable.
- **78 percent** report that AI regulation is necessary and indicate a preference for regulation by government and/ or existing regulators (74 percent) compared to other options.
- **32 percent** believe current regulations, laws and safeguards are sufficient to make AI use safe.
- **96 percent** view the principles and practices of trustworthy AI as important for their trust in AI systems.

AI in the workplace

- **37 percent** are willing to trust AI at work.
- **52 percent** disagree that AI will create more jobs than it will eliminate.
- **37 percent** agree that AI will replace jobs in their area of work.

AI IQ

- **69 percent** report a low understanding of AI and when it's being used; only Japanese respondents report a lower understanding.
- **80 percent** are interested in learning more about it.
- **58 percent** use common applications containing AI, the second lowest in the sample. **Under half** (47 percent) know that AI is used in those applications, the lowest in the sample.

Singapore

Singaporeans consistently report more positive attitudes toward AI than other countries, often clustered with, or just behind, the BICS countries on key measures. Singaporeans are among the most confident in entities to develop and govern AI, and one of the most trusting of AI at work.

AI trust and acceptance

- **45 percent** of Singaporeans are willing to trust AI, and **55 percent** are unwilling or unsure about trusting AI.
- **80 percent** accept AI.
- Most Singaporeans express positive emotions towards AI, with **72 percent** feeling optimistic and **66 percent** excited. Additionally, a **majority** feel relaxed (59 percent). However, **almost half** report feeling fearful (48 percent) and worried (49 percent) about AI.

Potential AI benefits and risks

- **90 percent** believe AI will have a range of benefits.
- **78 percent** are concerned about various risks related to AI, with cybersecurity risk being the top concern (84 percent), together with a loss of privacy (83 percent) and manipulation or harmful use (83 percent).
- **59 percent** think the benefits of AI outweigh the risks.

Who is trusted to develop and govern AI?

- **A majority** of Singaporeans have **confidence in all entities** to develop and regulate AI in the public's best interests (commercial organizations: 81 percent moderate-high confidence, international research organizations: 91 percent, defense forces: 91 percent).

Responsible AI

- **69 percent** feel the impact of AI on society is uncertain and unpredictable.
- **62 percent** report that AI regulation is necessary. Singaporeans support several forms of regulation, including co-regulation (81 percent), government and/or existing regulators (80 percent), industry (75 percent) and a dedicated AI regulator (72 percent).
- **Around half** (53 percent) believe current regulations, laws and safeguards are sufficient to make AI use safe, placing Singapore behind only India and China.
- **99 percent** view the principles and practices of trustworthy AI as important for their trust in AI systems.

AI in the workplace

- **60 percent** are willing to trust AI at work, ranking Singapore fifth behind the BICS countries.
- **Only 27 percent** disagree that AI will create more jobs than it will eliminate, which is lower than all other countries except China and India.
- **44 percent** agree that AI will replace jobs in their work area.

AI IQ

- **61 percent** report understanding AI, but **82 percent** are interested in learning more about AI.
- **75 percent** use common applications containing AI, and a similar percentage (71 percent) know that AI is used in those applications.

South Korea

Almost all South Koreans perceive AI as beneficial and most accept and have positive sentiments about it. However, many perceive it as risky and believe regulation is necessary. This balanced perspective may be partially attributed to most South Koreans reporting that they understand AI, potentially enabling them to appreciate its expected benefits and challenges.

AI trust and acceptance

- **31 percent** are willing to trust AI, with **69 percent** being unwilling or unsure about trusting AI.
- **78 percent** accept AI.
- **78 percent** are optimistic about AI, with a **majority** also feeling relaxed (72 percent) and excited (59 percent). However, a significant portion of the population is also fearful (56 percent) and worried (59 percent) about AI.

Potential AI benefits and risks

- **98 percent** believe AI will have a range of benefits, the second highest percentage in the sample.
- **86 percent** are concerned about various risks, with cybersecurity risk being the top concern (95 percent), followed by job loss due to automation (92 percent).
- **48 percent** think the benefits of AI outweigh the risks.

Who is trusted to develop and govern AI?

- South Koreans are **most confident** in national universities, technology companies and international research organizations to develop and govern AI in the public's best interests (81-85 percent moderate to high confidence).
- They're **least confident** in commercial organizations (66 percent) developing and governing AI.

Responsible AI

- **43 percent** feel the impact of AI on society is uncertain and unpredictable, one of the lowest rates in the sample.
- **82 percent** report that AI regulation is necessary, the highest in the sample after Israel. South Koreans support several forms of regulation (70-74 percent), with co-regulation being the most popular choice.
- **Only 17 percent** believe current regulations, laws and safeguards are sufficient to make AI use safe, a lower percentage than all countries except Japan.
- **98 percent** view the principles and practices of trustworthy AI as important for their trust in AI systems.

AI in the workplace

- **39 percent** are willing to trust AI at work.
- **53 percent** disagree that AI will create more jobs than it will eliminate, placing South Korea alongside Canada and behind only the UK in terms of disagreement.
- **47 percent** agree that AI will replace jobs in their work area.

AI IQ

- **85 percent** report understanding AI — the highest percentage in the sample.
- **90 percent** are interested in learning more about AI.
- **63 percent** use common applications containing AI and **64 percent** know that AI is used in those applications.

UK

Britons are ambivalent about AI. While most accept AI and believe it has benefits, few are willing to trust AI, and many are fearful and worried, expressing concern about its risks. This pattern is similar to that found in several other Western countries, including the US, Canada and Australia. Out of all the countries, Britons are most likely to disagree that AI will create more jobs than it will eliminate, while also having among the lowest rates of AI awareness.

AI trust and acceptance

- Only about **one-third** of Britons (34 percent) are willing to trust AI, with **66 percent** being unwilling or unsure.
- **61 percent** accept AI, with **39 percent** expressing low acceptance.
- **53 percent** are optimistic about AI, but many are also fearful (46 percent) and worried (44 percent).

Potential AI benefits and risks

- **72 percent** believe AI will deliver a range of benefits.
- **71 percent** are concerned about various AI-related risks, with cybersecurity risk being the top concern (81 percent), followed by job loss due to automation (79 percent).
- **Only 40 percent** think the benefits of AI outweigh the risks.

Who is trusted to develop and govern AI?

- Britons are **most confident** in national universities, international research organizations and defense forces to develop and govern AI in the public's best interests (82-88 percent moderate to high confidence).
- However, **almost half** (45 percent) have no or low confidence in the government, and **31 percent** have no or low confidence in commercial organizations.

Responsible AI

- **71 percent** feel the impact of AI on society is uncertain and unpredictable.
- **78 percent** report that AI regulation is necessary, with more agreeing (69-76 percent) that AI should be regulated by a dedicated AI regulator, government or co-regulation between government and industry than industry alone (57 percent).
- **Only 30 percent** believe current regulations, laws and safeguards are sufficient to make AI use safe.
- **97 percent** view the principles and practices of trustworthy AI as important for their trust in AI systems.

AI in the workplace

- **37 percent** are willing to trust AI at work.
- **63 percent** disagree that AI will create more jobs than it will eliminate — this is the highest percentage across all countries.
- **31 percent** agree that AI will replace jobs in their work area.

AI IQ

- **68 percent** report a low understanding of AI and when it's being used, the third lowest in the sample — only the Netherlands and Japan rank lower.
- However, **73 percent** are interested in learning more about AI.
- **68 percent** use common applications containing AI, and **just over half** (53 percent) know that AI is used in those applications.

US

Americans are wary about trusting and accepting AI and feel ambivalent about its benefits and risks. While these findings are similar to other Western countries, Americans differ from their Western counterparts in their beliefs about AI regulation and who should regulate it. Fewer people believe AI regulation is necessary than in the UK, Canada, Finland and the Netherlands. Americans are also among the least likely to agree that the government alone should regulate AI, but most support co-regulation.

AI trust and acceptance

- **40 percent** are willing to trust AI, with **60 percent** unwilling or unsure.
- **43 percent** have low acceptance of AI.
- **About half** are excited by AI (54 percent) but also fearful and worried (49 percent).

Potential AI benefits and risks

- **75 percent** believe AI will deliver a range of benefits.
- **72 percent** are also concerned about various risks, with cybersecurity risk being the top concern (82 percent). Americans are broadly like other countries in how they view the risks of AI.
- **Only 41 percent** feel the benefits of AI outweigh the risks.

Who is trusted to develop and govern AI?

- Americans are **most confident** in national universities, international research organizations and defense forces to develop and govern AI in the public's best interests (71-77 percent moderate to high confidence).
- However, **almost half** (49 percent) have no or low confidence in the government, and **39 percent** have no or low confidence in commercial organizations.

Responsible AI

- **72 percent** feel that the impact of AI on society is uncertain and unpredictable.
- **67 percent** report that AI regulation is necessary, with co-regulation by government and industry being the most popular option (60 percent agree).
- **Half** (53 percent) believe AI should be regulated by the government and/or existing regulators, which is lower than in other countries.
- **Only 30 percent** believe current regulations, laws and safeguards are sufficient to make AI use safe.
- **96 percent** view the principles and practices of trustworthy AI as important for their trust in AI systems.

AI in the workplace

- **39 percent** are willing to trust AI at work.
- **Half** disagree that AI will create more jobs than it will eliminate.
- **35 percent** agree that AI will replace jobs in their work area.

AI IQ

- **55 percent** report a low understanding of AI and when it is being used, but **73 percent** are interested in learning more about AI.
- **63 percent** use common applications containing AI, but **less than half** (49 percent) know that AI is used in those applications.
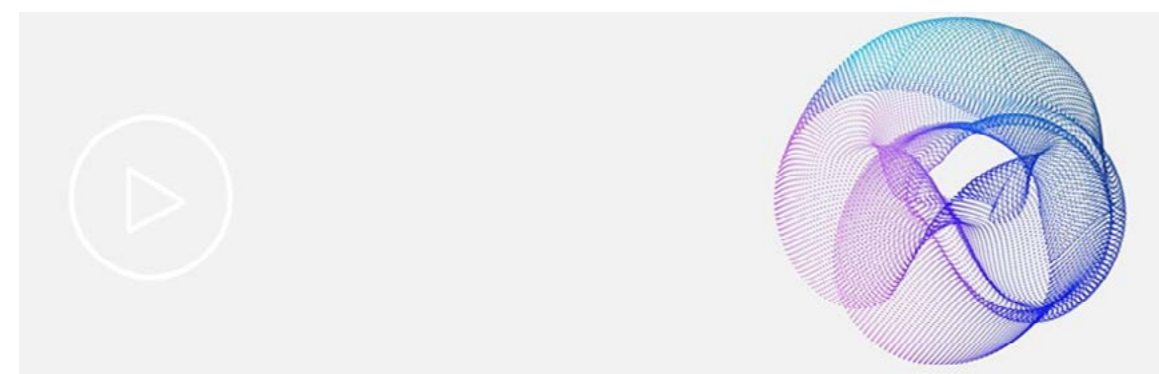
Additional insights

Trust in AI 2023: A global executive summary on the shifting public perceptions of AI

Examine the Global executive summary.

Trust in AI 2023: Complete global study

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.

About the survey

Data was collected in each country using representative research panels.[2] 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[3] , and 3) diversity on the Responsible AI Index.[4]
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 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.[5] 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.

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

[3] We focused primarily on the 2021 *Government AI Readiness Index.*

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

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

How this connects with what we do:

KPMG is helping global businesses in every sector embrace a new era of opportunity in the digital economy. From strategy to implementation, KPMG professionals can help transform your current business model to drive future competitiveness, growth and value. **KPMG Make the Difference**.

KPMG Connected Enterprise

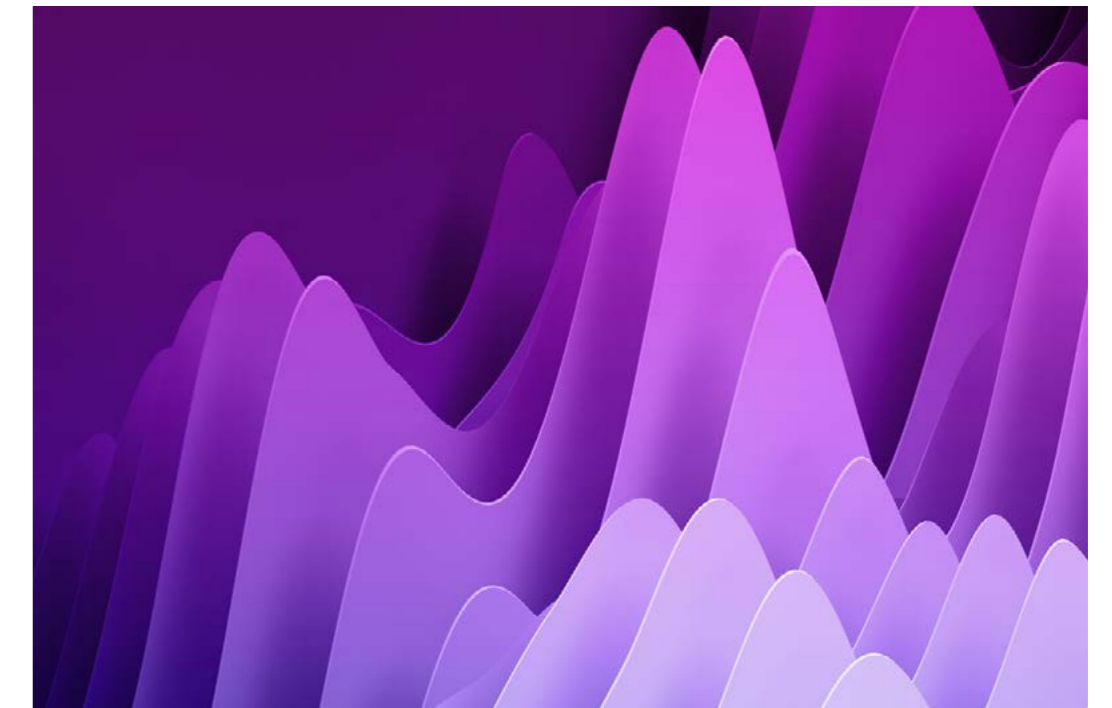KPMG's customer centric, agile approach to digital transformation, tailored by sector.

KPMG Powered Enterprise

Be the competition that others want to beat — with outcome-driven functional transformation made possible by KPMG Powered Enterprise.

KPMG Trusted

How to build and sustain the trust of your stakeholders.

KPMG Elevate

Unlock financial value quickly and confidently.

Contacts
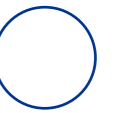
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