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KPMG

# Trust, attitudes and use of artificial intelligence

## A global study 2025

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At various stages of the project, the research team sought feedback and input from a multidisciplinary advisory board, including academics and industry experts, while maintaining independence over the conduct and reporting of the research.

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# Executive summary

The release of ChatGPT in late 2022 brought the transformative power of AI firmly into the public consciousness and everyday experience. While exponential investment in AI predated its release, individual and organizational use of AI has increased dramatically and rapidly since 2022.[1] For example, OpenAI's suite of generative AI tools obtained over 100 million users in only two months.[2] AI is now firmly part of everyday life and work for many people and is widely embraced across all sectors of the global economy, including finance, education, transport, manufacturing, agriculture, healthcare, retail, and media.[3]

The benefits and promise of AI for society and business are undeniable. AI systems are being used to make cancer detection faster and more accurate, enhance the efficiency of renewable energies, and drive productivity and innovation in the workplace, among other impactful use cases.[4] However, as AI's capabilities and reach become more apparent, so too has awareness of the risks and challenges, raising questions about the trustworthiness, regulation, and governance of AI systems. The public's trust in AI technologies and its responsible and ethical use is central to sustained acceptance and adoption and in realizing the full societal and economic benefits of these technologies.

Given the rapid advancement and widespread adoption of AI technologies—and their transformative effects on society, work, education, and the economy—bringing the public voice into the conversation has never been more critical. This research aims to provide an evidence-based understanding of people's trust, use and attitudes toward AI, their views on the impacts of AI, and expectations of its governance and regulation.

The insights are important to inform public policy and industry practice and a human-centered approach to stewarding AI into work and society. They can help policymakers, organizational leaders, and those involved in developing, deploying, and governing AI systems to understand and align with evolving public expectations, and deepen understanding of the opportunities and challenges of AI integration.

> Now in its fourth iteration, the research captures the views of more than 48,000 people from 47 countries, representing all global geographic regions. It offers the most comprehensive examination to date of public trust and attitudes toward AI. In addition, it takes a deep dive into how employees and students use AI in work and education and their experience of the impacts of AI in these specific settings.

The report provides timely, global research insights on a range of questions, including the extent to which people trust, use, and understand AI systems; how they perceive and experience the benefits, risks and impacts of AI use in society, at work and in education; expectations for the management, governance and regulation of AI by organizations and governments; how employees and students are using AI for work and study; and perceived support for the responsible use of AI. It draws out commonalities and differences in these key dimensions across countries and sub-groups of the population, and sheds light on how trust and attitudes toward AI have changed over the past two years since the widespread uptake of generative AI.

Next, we summarize the key research insights.

# A snapshot of key findings

## Trust and acceptance of AI

Trust in AI systems remains a significant challenge: over half (54%) are wary about trusting AI. People are more skeptical of the safety, security and societal impact of AI and more trusting of its technical ability. While most people feel both optimistic and worried about AI, 72% accept its use. People in advanced economies are less trusting (39% vs. 57%) and accepting (65% vs. 84%) compared to emerging economies.

## AI use and understanding

Two in three (66%) intentionally use AI on a regular basis and three in five say they can use AI effectively. However, most (61%) have no AI training and half report limited knowledge. People in emerging economies report higher regular use (80% vs 58%), training (50% vs 32%), knowledge (64% vs 46%) and efficacy (74% vs 51%) than those in advanced economies. People that are younger, university-educated, higher-income earners and AI-trained report more trust, use and AI literacy.

## AI benefits and risks

People report experiencing both benefits and negative outcomes from AI use. While many report improved efficiency, accessibility, decision-making and innovation, concerns about cybersecurity, privacy and IP, misinformation, loss of human connection, job loss and deskilling are widespread. The public's ambivalence towards AI is evident, with divided opinion on whether the benefits outweigh the risks in advanced economies.

## AI regulation and governance

There is a strong public mandate for AI regulation, with 70% believing regulation is necessary. However, only 43% believe current laws are adequate. People expect international laws (76%), national government regulation (69%), and co-regulation with industry (71%). 87% also want laws and fact-checking to combat AI-generated misinformation.

## AI adoption in the workplace

Three in five (58%) employees intentionally use AI at work on a regular basis, with a third using it weekly. Generative AI tools are most commonly used with many employees opting for free, publicly available tools rather than employer-provided options. Emerging economies are leading in employee adoption with 72% using AI regularly compared to 49% in advanced economies.

## Impacts of AI at work

Over half of employees report performance benefits from AI. However, employees also report mixed impacts on workload, human interaction and compliance and two in five believe AI will replace jobs in their area. Many employees report inappropriate, complacent and non-transparent use of AI in their work, contravening policies and resulting in errors and dependency. Governance and training to support responsible AI use appears to be lagging adoption.

## Student engagement with AI

Four in five students (83%, predominately tertiary) regularly use AI in their studies, reporting benefits such as efficiency, personalization of learning, and reduced workload and stress. However, inappropriate, complacent and non-transparent use of AI by students is widespread, raising concerns about over-reliance and diminished critical thinking, collaboration, and equity of assessment. Only half report their education provider has policies, resources or training to support responsible AI use.

## The age of working with AI is here and is delivering performance benefits, but also mixed impacts

Across countries, almost three in five employees intentionally[5] use AI at work on a regular basis, with almost a third using it weekly or more. General-purpose generative AI tools are by far the most widely used, with most employees using free, public tools like ChatGPT rather than tools provided by their employer. Three in four report that their organization uses AI, with almost half stating AI is used in a broad range of tasks and functions.

Emerging economies[6] are leading workplace adoption of AI, with employees in these economies more likely to use AI regularly (72% vs 49%) than those in advanced economies.

The use of AI at work is clearly delivering a range of positive performance benefits. Most employees report increased work efficiency, access to accurate information, innovation, higher quality of work and decisions, and better use and development of skills and abilities. Almost half report that AI use has increased revenue-generating activity.

However, employees also report mixed impacts on workload, stress, human collaboration, compliance, and surveillance at work. For example, half say they use AI rather than collaborating with peers or supervisors to get work done, and one in five say AI use has reduced communication, interaction and collaboration, raising the question of how human connectivity will be retained in AI-augmented workplaces. These insights underscore the importance of understanding and managing the impacts of AI at work, ensuring appropriate work design, and building employee capabilities in effective human-AI collaboration.

## The responsible use and governance of AI is not keeping pace with adoption: many employees are using AI in complacent and inappropriate ways which increase risk

While the rapid adoption of AI is delivering benefits, many employees are using AI in complacent and inappropriate ways, increasing risks for organizations and individuals and raising quality issues. For example, almost half admit to using AI in ways that contravene organizational policies and uploading sensitive company information, such as financial, sales, or customer information, to public AI tools. Three in five report they have seen or heard of other employees using AI tools in inappropriate ways. Two in three report relying on AI output without evaluating the information it provides, and over half say they have made mistakes in their work due to AI.

What makes these risks even more challenging to manage is that over half of employees avoid revealing when they use AI to complete their work and present AI-generated content as their own. These findings highlight a lack of transparency and accountability in the way AI, particularly generative AI tools, are being used by employees at work.

This complacent use may be fueled by inadequate training, guidance, and governance of responsible AI use at work: within organizations that use AI, only one in two employees in advanced economies report that their organization offers training in responsible AI, has policies and practices on responsible AI use, or a strategy and culture that supports AI. Despite the high use of generative AI tools, only two in five say there is a policy guiding its use. Complacent use may also be exacerbated by a sense of pressure to use AI, with half of employees feeling they will be left behind if they don't.

From a governance perspective, these findings highlight a critical gap and urgent need for organizations to proactively invest in responsible AI training and the AI literacy of employees to promote critical engagement with AI tools. They also underscore the need to put in place mechanisms to effectively guide and govern h*ow employees use AI tools* in their everyday work, to promote greater accountability, transparency, and employee engagement.

## Most students use AI and report benefits, but inappropriate use and over-reliance is widespread and challenging critical skill development

The findings for students (predominately tertiary students) provide insight into how AI is being used by the next generation of the workforce and affecting education and training. Results mirror those for employees but are more pronounced. Four in five (83%) students regularly use AI in their studies, with half using it weekly or daily. The large majority use free, publicly available generative AI tools.

Most students are deriving significant benefits from AI use in education, such as increased efficiency, access to information, quality of work, idea generation and personalization of learning, and reduced workload and stress. However, AI's influence on social dynamics, critical thinking, and assessment is mixed. For example, a quarter to a third of students report reduced critical thinking and less communication, interaction, and collaboration with instructors and peers. A similar number perceive less trust of students by instructors and peers, and reduced fairness and equity of assessment due to AI.

The complacent use of AI by students is widespread. Most students have used AI inappropriately, contravening rules and guidelines and over-relying on AI. Two-thirds have not been transparent in their AI use, presenting AI-generated content as their own and hiding their use of AI tools. Only half regularly engage critically with AI tools and their output.

The level of student dependence on AI is concerning: over three-quarters have felt they could not complete their work without the help of AI and rely on it to do tasks rather than learning how themselves. Four in five say they put less effort into their studies and assessment knowing they can rely on AI.

A lack of institutional support for responsible AI use may be contributing to this problem: only half of students report their education provider has policies to guide responsible use of AI in learning and assessment, or training and resources to support AI understanding and responsible use.

These findings may have longer-term implications for the effective development of essential skills—such as critical thinking, communication and collaboration, with implications for organizations as these students enter the workforce.

## Trust in AI cannot be taken for granted: many people are wary about trusting AI systems, particularly in advanced economies

Despite high rates of individual adoption, trust remains a critical challenge. Over half (54%) of people are wary about trusting AI systems. Underlying this average are differences between economic groups: three in five people in advanced economies are unwilling or unsure about trusting AI systems. In contrast, in emerging economies, three in five people trust AI systems. We find similar levels for employee trust in the use of AI at work, and student trust of AI for educational purposes.

People are more skeptical about the safety, security, and ethical use of AI systems and more trusting of the technical ability of AI to provide helpful output and services. This helps explain individual use of AI to gain performance benefits, despite trust concerns around its broader impact on society and people. While the majority accept the use of AI systems, most people report low or moderate acceptance and approval levels. People's ambivalence toward AI is also reflected in their emotions: the majority report optimism and excitement, coupled with worry.

People have high confidence in universities, research, and healthcare institutions to use and develop AI in the best interests of the public, and generally less confidence in government to do so. People in advanced economies have lower confidence in industry and big technology companies to develop and use AI in the public interest, whereas confidence in these entities is high in emerging economies.

Organizations can build stakeholders' trust in their use of AI by investing in responsible AI governance mechanisms that signal trustworthy use: four in five people report they would be more willing to trust an AI system when assurance mechanisms are in place, such as monitoring system reliability, human oversight and accountability, responsible AI policies and training, adhering to international AI standards, and independent third-party AI assurance systems.

## People are experiencing a range of benefits and negative outcomes from the use of AI in society

People's ambivalence toward AI stems from the mixed benefits, risks and negative impacts that are being felt from AI use in society: 42 percent believe the benefits outweigh the risks, 32 percent believe the risks outweigh the benefits, and 26 percent believe the benefits and risks are balanced.

Three in four report experiencing a broad range of benefits, including improved efficiency and effectiveness, enhanced accessibility to information and services, greater precision and personalization, improved decision-making and outcomes, greater innovation and creativity, reduced costs and better use of resources. These outcomes benefit individuals, while also bringing performance-oriented benefits to organizations and society more broadly.

However, people's experience of these benefits is coupled with clear concerns about the risks and negative impacts of AI on society. Four in five people are concerned about—and two in five have personally experienced or observed—negative outcomes from AI. These include the loss of human interaction and connection, cybersecurity risks, loss of privacy or intellectual property, misinformation and manipulation, harmful or inaccurate outcomes, deskilling and dependency, job loss, and disadvantage from unequal access to AI. Comparatively fewer people are concerned about AI bias resulting in unfair treatment and the environmental impact of AI, however even these outcomes are reported by a third of people surveyed.

Respondents across countries share similar views and experiences regarding AI risks and negative outcomes, highlighting these as areas of universal concern. These negative outcomes are not just 'perceived risks' but harms that are being experienced or observed by a significant proportion of people across the 47 countries surveyed. These findings reinforce the need for international cooperation and coordinated action to prevent and mitigate AI risks and negative impacts. The challenge is doing this in a balanced way that does not undermine progress or hinder the innovation required to realize the many societal benefits of AI.

## The public expect AI regulation at both the national and international level. Yet the current regulatory landscape is falling short of public expectations.

There is a strong public mandate for AI regulation to mitigate the societal risks and negative impacts of AI: Seventy percent of people believe AI regulation is required, including the majority in almost all countries surveyed. This broad public consensus on the need for regulation supports national and international efforts in many jurisdictions to develop and implement regulatory and governance frameworks to support the safe and responsible use of AI.

However, the current regulatory landscape is falling short of public expectations: only two in five believe that the existing laws and regulation governing AI systems in their country are adequate. Most people are unaware of laws, legislation or government policy that apply to AI.

These findings reflect that most countries and jurisdictions are still in an early stage of designing or implementing regulatory approaches. While some countries have adaptive legislation that may apply to AI (e.g. consumer or privacy laws), such laws are absent or weakly enforced in some jurisdictions. This suggests the need to clarify, develop or strengthen such legislation where it is lacking and to educate and raise public awareness of applicable laws. The importance of effective, fit-for-purpose regulation—and awareness of such regulation—is underscored by our finding that the perceived adequacy of AI regulation is a key predictor of trust and acceptance of AI systems.

The majority of people expect a multipronged national and international regulatory approach to AI, with international laws and regulation the most endorsed form of regulation and supported by a clear majority in all countries. National government regulation or a co-regulatory approach between government and industry is preferred in most countries over self-regulation by industry or an independent AI regulator. This highlights the public's expectation that government takes a central role in ensuring effective governance and regulation of AI, as well as the expectation that industry will work with regulatory bodies and proactively align their governance approach with the evolving regulatory landscape.

There is also a clear mandate for stronger regulation of AI-generated misinformation: 87 percent of respondents want laws to combat AI-generated misinformation and expect social media and media companies to implement stronger fact-checking processes and methods that enable people to detect AI-generated content. Our findings indicate that AI generated misinformation is a key concern globally and is undermining trust in online content and raising concerns about the integrity of elections.

## AI literacy is lagging AI adoption yet is critical for responsible and effective use

Although AI tools are being widely used by the public, employees and students, AI literacy remains limited; about half of respondents say they don't feel they understand AI nor when or how it is used. Half of respondents are unaware that AI underpins common applications such as social media, despite 90 percent saying they use such platforms. This knowledge gap reflects that only two in five people report any AI-related training or education.

Despite low rates of knowledge and training, three in five say they can use AI effectively. This likely reflects the easily accessible interfaces of many AI systems (e.g. using natural language) and low barriers to use. While this accessibility has benefits, it also risks fostering complacency and overreliance if not accompanied by meaningful levels of understanding and literacy.

AI literacy is higher in emerging economies, where three-quarters believe they can use AI effectively, compared to half in advanced economies, and half report AI training or education compared to a third in advanced economies.

AI literacy consistently emerges in our findings as a cross-cutting enabler: it is associated with greater use, trust, acceptance, and critical engagement, and more realized benefits from AI use including more performance benefits in the workplace.

The pattern of findings underscores that AI literacy and training in responsible use is not only a personal skillset, but can also be a strategic capability for organizations and societies alike, enabling people to recognize and seize the capabilities of AI while recognizing their limitations and guarding against harm. Investing in AI literacy is a critical component of ensuring AI is used safely, ethically, and to its full potential.

## There are notable differences between countries with advanced and emerging economies: People in emerging economies report greater trust, acceptance and adoption of AI, higher levels of AI literacy, and more realized benefits from AI

One of the most striking insights from the survey is the stark contrast in use, trust, and attitudes toward AI between people in advanced and emerging economies.

People in emerging economies report higher adoption and use of AI both at work and for personal purposes, are more trusting and accepting of AI, and feel more positive about its use. They report higher levels of AI training and literacy, are more likely to expect and realize the benefits of AI, and view AI benefits as outweighing the risks. They are also more confident in the development and use of AI by commercial organizations and big technology companies and more likely to view current AI regulation and safeguards as adequate, compared to people in advanced economies. These differences hold even when controlling for the effects of age and education.

These findings suggest that many countries with emerging economies are leading the way in terms of AI adoption.[7] In particular, six countries with emerging economies strongly and consistently show this pattern—India, China, Nigeria, the UAE, Saudi Arabia and Egypt. Of the advanced economies, Norway, Israel, Singapore, Switzerland and Latvia have comparatively high levels of AI adoption, trust, acceptance, and positive attitudes toward AI.

An implication is that these countries may be uniquely positioned to rapidly accelerate innovation and technological advantage through AI. This has implications for global competitive dynamics and may create shifts in the economic landscape across countries in the future as AI becomes a more prominent driver of productivity and economic activity.

## Pathways to support the trusted and responsible adoption of AI

Our modeling supports four distinct yet complementary pathways to trusted and sustained AI adoption: a *knowledge pathway* reflecting the importance of supporting people's AI literacy and efficacy through AI training and education; a *motivational pathway* reflecting the importance of deploying AI in a human-centric way that delivers benefits to people; the *uncertainty reduction pathway* reflecting the need to address concerns about the risks associated with AI, and an *institutional pathway* reflecting the adequacy of current safeguards, regulation and laws to promote safe AI use, and confidence in entities to develop and use AI in the public interest.

Of these drivers, the institutional pathway had the strongest influence on trust, followed by the motivational pathway. This model also holds at the organizational level where the institutional pathway reflects appropriate levels of organizational governance, strategy, and training to support AI and its responsible use.

## AI adoption has increased markedly since 2022, but trust in AI has declined and worry has increased

Our research program provided the unique opportunity to compare data from the current survey with our previous survey data collected from 17 countries in late 2022, just prior to the release of ChatGPT. This comparison revealed a trend of less positive attitudes toward AI, as adoption has increased.

As expected, adoption of AI in the workplace increased dramatically in all 17 countries: employee reported organizational use of AI increased from 34 percent to 71 percent, and employees' use of AI at work increased from 54 percent to 67 percent. The largest increases occurred in Australia, Canada, the USA, and the UK.

However, this increased adoption is coupled with a trend toward people feeling more concerned about and less trusting of AI. People's perceptions of the trustworthiness of AI systems and their willingness to rely on AI declined in most countries, as did employee trust of AI at work in some countries. This decline in trust likely reflects that increased use and exposure, particularly to general-purpose generative AI tools, has increased awareness of both the capabilities and benefits of these tools, and also their limitations and potential negative impacts (e.g. hallucinations), prompting more considered trust and reliance.

More people report feeling worried about AI and concerned about the risks, and fewer view the benefits of AI as outweighing the risks. For example, in Brazil half of people reported feeling worried about AI in 2022 compared to 75% in 2024, and the view that the benefits of AI outweigh the risks fell from 71% to 44%. Excitement also dampened over this time in several countries.

With this increase in concern, the importance of organizational assurance mechanisms as a basis for trust increased in all countries, suggesting a greater need for reassurance that AI is being used in a trustworthy and responsible way.

Attitudes toward the regulation of AI remained stable and there was no overall change to the perceived adequacy of regulation and laws.

Despite the rapid uptake of AI, we found no discernible change in the public's self-reported understanding of AI, or their objective awareness of AI use in common applications.

This pattern of findings suggests that the hype of AI may be giving way to a more realistic and measured assessment of AI's capabilities and limitations, benefits and risks, and heightened need for reassurance around the trustworthy deployment of AI and proactive mitigation of AI risks.

Collectively, the survey insights provide evidence-based pathways for strengthening the responsible use of AI systems and the trusted adoption of AI in society and work. These insights are relevant for informing responsible AI strategy, practice and policy within business, government, and education at a national level, as well as informing AI guidelines, policy and regulation at the international and pan-governmental level.

# Introduction

The motivation for this research is to provide an evidence-based understanding of public trust, attitudes, and experiences of AI, and expectations of its governance and regulation, as a resource to inform public policy and industry and government practice.

Given the rapid advancement, widespread deployment and transformative impact of AI technologies, it is important to regularly examine public trust, attitudes, and expectations of AI. Equally important is documenting how people use AI technologies and experience the impacts of AI in their lives, work, and studies, and the implications this may have for organizations, education providers, and society at large. To date, there has been limited empirical insight addressing these critical issues, underscoring the relevance of this research in promoting human-centered AI that meets evolving societal needs and expectations.

This is the fourth survey in our program of research examining public trust and attitudes toward AI. Our current report examines the perspectives of over 48,000 people from 47 countries covering all global geographic regions, using nationally representative sampling of the adult population based on age, gender, and regional distribution. Taking a global perspective is crucial, given that AI systems are not bound by physical borders and are rapidly being deployed and used across the world.

Our program of research provided the unique opportunity to benchmark and compare the findings in this report to our previous survey data collected from 17 countries in late 2022, just prior to the release of ChatGPT. We examine changes in public trust and attitudes over time in these 17 countries and highlight changes where relevant throughout the report (see 'How we conducted the research' for more details).

## The Trust in AI Research Program

This study is the fourth in a research program examining public trust in AI. Each study has been designed to uphold academic rigor and independence, whilst leveraging the deep multidisciplinary expertise and insight from KPMG. The first focused on Australians' trust in AI in 2020, the second expanded the research scope to study trust in five countries in 2021, and the third surveyed people in 17 countries in 2022.

Our research insights are structured in three sections. The first focuses on AI use broadly in society examining the public's use, understanding, trust, attitudes and experience of AI systems and their impact on society. These insights are based on all respondents answering survey questions asked about AI systems in general, as well as AI use in the context of three common applications which are likely to be used by or impact many people: generative AI systems, AI in healthcare, and AI in Human Resource applications.

In the second section, we delve deeper into understanding how employees use and experience AI impacts in the workplace. In the third section, we examine student use of AI and their perceptions of how AI impacts education.

Together, these sections provide evidence-based insights on the following questions:

- To what extent do people use and understand AI systems?
- To what extent do people trust and accept AI systems?
- How do people view and experience the benefits and risks of AI?
- What do people expect from the regulation and governance of AI?
- What are the key drivers of AI trust and acceptance in society?
- How is AI being used at work and with what impacts?
- How is AI being used by students and with what impacts?

The final section draws out the key conclusions and implications from these insights for industry, government, and the education sector. We next outline the research methodology.

# How the research was conducted

## How the data was collected

Data was collected in each country between November 2024 and mid-January 2025 using an online survey.

Countries were selected based on three criteria: 1) representation across global regions; 2) leadership in AI activity and readiness,[10] and 3) diversity on the Responsible AI Index.[11] The sample size in each country ranged from 1,001 to 1,098 respondents.

Analysis of the data revealed a distinct pattern of findings across countries with emerging and advanced economies. We adopted the International Monetary Fund's (IMF) classification of advanced and emerging economies. The emerging economies surveyed are Argentina, Brazil, Chile, China,[12] Colombia, Costa Rica, Egypt, Hungary, India, Mexico, Nigeria, Poland, Romania, Saudi Arabia, South Africa, Türkiye, and UAE.

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 for further method details.

**48,340**

people completed the survey across 47 countries and jurisdictions, covering all global geographical regions[8]:

1. North America (Canada, United States of America [USA])
2. Latin America and Caribbean (Argentina, Brazil, Chile, Colombia, Costa Rica, Mexico)
3. Northern and Western Europe (Austria, Belgium, Denmark, Estonia, Finland, France, Germany, Ireland, Latvia, Lithuania, Netherlands, Norway, Sweden, Switzerland, United Kingdom [UK])
4. Southern Europe (Greece, Italy, Portugal, Slovenia, Spain)
5. Eastern Europe (Czech Republic, Hungary, Poland, Romania, Slovakia)
6. Africa (Egypt, Nigeria, South Africa)
7. Western Asia (Israel, Saudi Arabia, Türkiye, United Arab Emirates [UAE])
8. Eastern, Southern and Central Asia (China,[9] , India, Japan, Republic of Korea, Singapore)
9. Oceania (Australia, New Zealand)

# The 47 countries surveyed

- Argentina
- Australia
- Austria
- Belgium
- Brazil
- Canada
- Chile
- China
- Colombia
- Costa Rica
- Czech Rep.
- Denmark
- Egypt
- Estonia
- Finland
- France
- Germany
- Greece
- Hungary
- India
- Israel
- Italy
- Ireland
- Japan
- Latvia
- Lithuania
- Mexico
- Netherlands
- New Zealand
- Nigeria
- Norway
- Poland
- Portugal
- Republic of Korea
- Romania
- Saudi Arabia
- Singapore
- Slovakia
- Slovenia
- South Africa
- Spain
- Sweden
- Switzerland
- Türkiye
- United Arab Emirates
- United Kingdom
- United States of America

## Who completed the survey?

Representative research panels were used to ensure the people who completed the survey are representative of the population.[13] This approach is common in survey research.

Samples were nationally representative of the adult population on gender, age and regional distribution matched against official national statistics. In select countries, full representation on these criteria was not obtainable (see Appendix 2 for further details on country sampling).

Across the total sample, the gender balance was 51 percent women, 49 percent men and <1 percent other gender identities. The mean age was 46 years and ranged between 18 and 95 years. Half the sample (51%) had a university education and 20 percent a vocational or trade qualification.

The sample represented the full range of income levels, with the majority (72%) reporting middle incomes (see Appendix 1 for details of the income measure).[14]

Sixty-seven percent of respondents were currently working full-time or part-time. These respondents represented the diversity of industries and occupational groups listed by the OECD and International Labor Organization[15] and included employees of small, medium, and large organizations, business owners, and people who were self-employed (e.g. sole traders and freelancers).

Five percent of respondents were students, with the majority tertiary students enrolled in university education (65%) or a vocational, trade or technical program (16%), and the remainder in secondary education (18%).

Further details of the sample representativeness, including the demographic profile for each country sample, are shown in Appendix 2.

**Gender**

- 51% Women
- 49% Men
- <1% Other genders

**Age Group**

- 12% 18-24
- 38% 25-44
- 32% 45-64
- 18% 65-95

**Education**

- 2% Primary
- 4% Some secondary
- 23% Secondary
- 20% Vocation/trade
- 37% Undergraduate
- 14% Postgraduate

**Income Group**

- 15% Low
- 72% Middle
- 13% High

**Work Status**

- 52% Working full time
- 15% Working part time
- 28% Not working

**67% Employees** (n=32,352)

**Occupation**

- 32% Professional & skilled
- 22% Manager
- 21% Administrative
- 14% Manual
- 10% Services & Sales
- 1% Other

**Employment Type**

- 77% Employed by an organization
- 7% Business owner with employees
- 16% Self-employed

**Organization Size**

- 26% Small (2-49 employees)
- 32% Medium (50-249 employees)
- 42% Large (250+ employees)

**5% Students** (n=2,499)

**Current Education Program**

- 18% Secondary education
- 16% Vocation or trade
- 54% Bachelor's or equivalent
- 11% Postgraduate
- 1% Other

## How we asked about AI

After asking a series of questions about respondents' understanding of AI, the following description of AI, adapted from the OECD definition,[16] was provided: *Artificial Intelligence (AI) refers to machine-based systems that infer from the input they receive and objectives provided, how to generate outputs such as predictions, content, recommendations, or decisions. Different AI systems vary in their levels of autonomy and adaptiveness.*

As attitudes toward AI systems may depend on their purpose and use, survey questions that asked about the use of AI systems in society referred to one of four AI use cases (randomly allocated, see below): Generative AI (used to create output and content in response to user prompts); Healthcare AI (used to inform decisions about how to diagnose and treat patients); Human Resources AI (used to inform decisions about hiring and promotion); and AI systems in general.

These use cases were selected to represent AI applications that are widely and increasingly used and can impact many people, and were developed based on expert input. Respondents were provided with a description of the AI use case allocated to them, before answering questions related to AI systems.

### Generative AI

A form of AI used to create content such as text, images, audio, and video based on user prompts. It works by processing these prompts and generating new content based on patterns and structures it has learned from extensive amounts of data. People use generative AI for a wide range of applications, such as writing, programming, personalized education, administrative support, product design and development, forecasting, and creating art and music.

### Human Resources AI

An AI system used to help select the most suitable applicants for a job, identify employees who are most likely to perform well in a job, and predict who is most likely to quit. It works by collecting and comparing worker characteristics, employee data, and performance over time, and analyzing which qualities are related to better job performance and job retention. Managers use Human Resources AI to inform decisions about hiring and promotion.

### Healthcare AI

An AI system used to improve the diagnosis of disease (e.g. cancer), inform the best treatment options, and predict health outcomes based on patient data. It works by comparing a patient's health data (e.g. symptoms, test and scan results, medical history, family history, age, weight and gender, etc.) to large datasets based on many patients. Doctors use Healthcare AI to inform decisions about patient diagnosis and treatment.

## How the data was analyzed

Statistical analyses were conducted to examine differences between countries and economic groups (e.g. countries with advanced and emerging economies, as classified by the IMF), and demographic factors (e.g. gender, age, education, income, occupation). Relevant differences are reported when statistically significant and meaningful. Correlational analyses and statistical models indicate associations between concepts and do not infer causality. Further details of the statistical procedures are discussed in Appendix 1. An overview of key indicators for each country sample are shown in Appendix 3.

## How changes in trust, use and attitudes over time were assessed

To understand how trust, use, and attitudes toward AI have shifted over time, a selection of questions was asked in the same way in the 2022 and 2024 surveys.

The 2022 survey included 17 countries: Australia, Brazil, Canada, China, Estonia, Finland, France, Germany, India, Israel, Japan, Netherlands, Singapore, South Africa, Korea, the UK, and the USA.[17]

While the samples collected in 2022 and 2024 are based on the same methodology and sample representativeness, they are independent of each other. As such, our analyses examine general trends rather than a longitudinal analysis of the same respondents over time. Relevant insights on these changes are highlighted in call-out boxes throughout the report (for an overview, see Appendix 4).

SECTION ONE

# Public attitudes towards AI

In this first section, we examine the public's adoption and understanding of AI and their trust, acceptance, and emotions towards the use of AI systems in society. We explore people's expectations and experience of positive and negative impacts from AI systems, how they view the benefits relative to the risks, and expectations of AI regulation and governance. We test a model identifying key predictors of AI trust and acceptance and explore how people from various demographic groups differ in their attitudes toward and use of AI.

# To what extent do people use and understand AI systems?

To contextualize the findings and provide an indicator of overall public adoption of AI and AI literacy levels, we first examine people's use and understanding of AI systems and how this varies across countries. To identify levels of AI literacy, survey participants self-reported their level of AI knowledge and efficacy together with AI-related education and training. They were also asked about their objective understanding of AI use in common technologies and interest in learning more about AI.

In subsequent sections of the report, employees' and students' use of AI at work and for educational purposes are examined in more detail, together with organizational support for AI literacy.

### Public adoption of AI is high: Two in three people report intentional regular use of AI tools for either personal, work, or study purposes

People were asked to report how often they *intentionally* use AI tools, clarifying that this use is different from the passive use of AI (e.g. when AI operates behind the scenes in tools such as email filters and search engines).

Two thirds of people (66%) report intentionally using AI on a regular basis for personal, work, or study reasons. As shown in Figure 1, two in five (38%) people report using AI on a weekly or daily basis, whereas just over a quarter (28%) use AI semi-regularly (i.e. every month or every few months). One-third (34%) rarely or never intentionally use AI.

Three in five (59%) use AI at least semi-regularly for personal purposes, with those not working or studying much less likely to use AI (only 37%). Three in five (58%) people who work intentionally use AI regularly for work purposes, while four in five (83%) students regularly use AI in their studies.

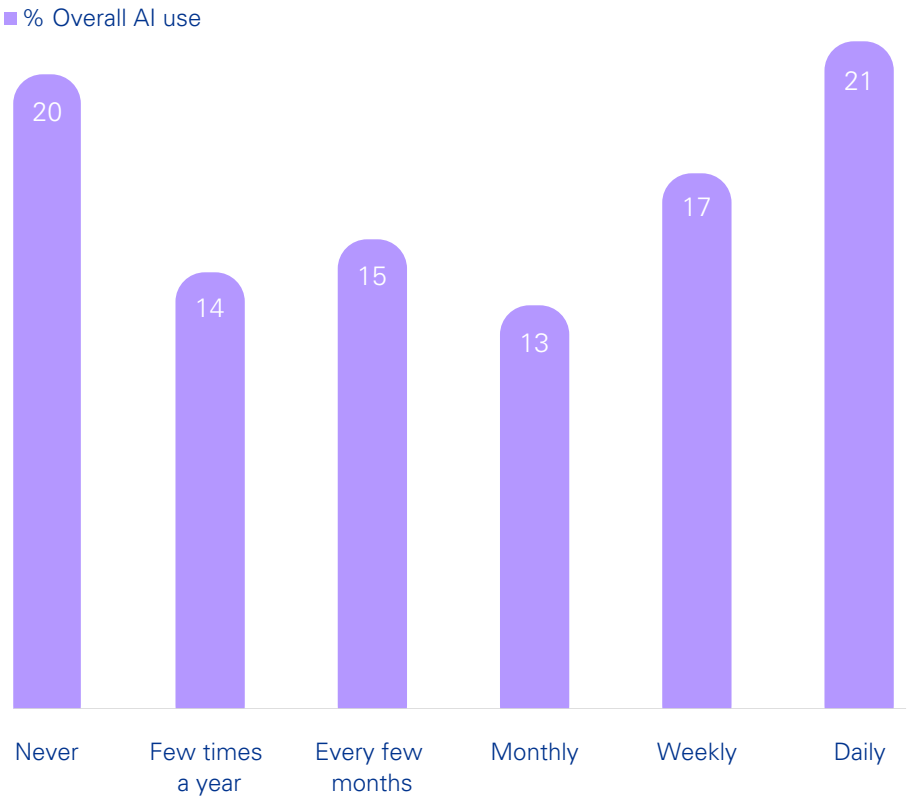
This high level of adoption reflects the ease with which AI systems—particularly general-purpose generative AI tools—can be accessed and used by a diverse range of people and applied to a broad variety of tasks. This sets AI apart from many other advanced technologies that have greater barriers and constraints on access and use by individuals.

**38%**

of people report using AI on a weekly or daily basis.

## Figure 1: Frequency of intentional use of AI tools for personal, work, or study purposes

'In your personal life (work/studies), how often do you intentionally use AI tools, including generative AI tools?'




Daily = 'most days' or 'multiple times a day'

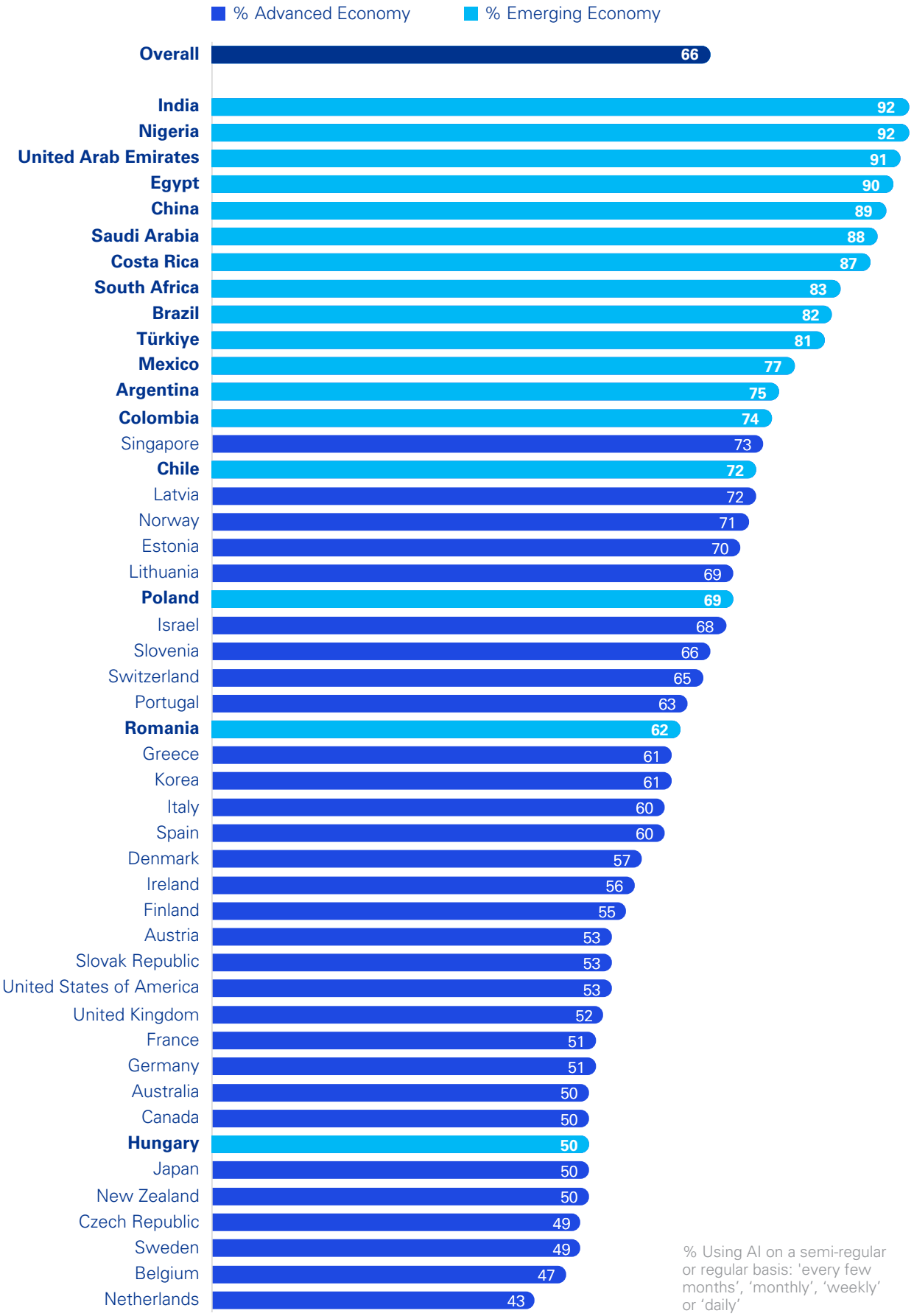
## There are notable differences across countries in people's adoption of AI, with emerging economies leading the way

There is a distinct pattern of findings between countries with advanced and emerging economies, with the use of AI tools notably higher in countries with emerging economies. On average, four in five (80%) people in emerging economies intentionally use AI tools on a regular or semi-regular basis, compared to three in five (58%) in advanced economies.

As shown in Figure 2, levels of AI use in most emerging economies exceed 70 percent of the population, with India and Nigeria reporting the highest regular or semi-regular usage (92%). Two emerging economies located in Eastern Europe—Hungary and Romania—have notably lower AI use compared to the other emerging economies.

In contrast, AI use levels in most advanced economies fall below 70 percent of the population, with the lowest usage reported in the Netherlands (43%) and the highest in Singapore (73%).

## Figure 2: Regular use of AI systems across countries



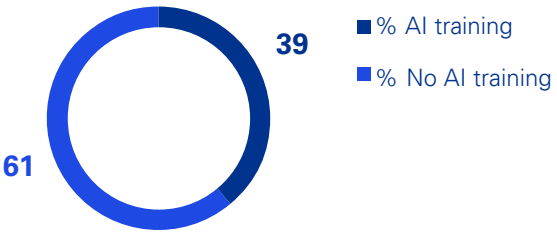

% Using AI on a semi-regular or regular basis: 'every few months', 'monthly', 'weekly' or 'daily'

## Most people have no AI training and half don't feel they understand AI, yet 3 in 5 believe they can use AI effectively

Despite high levels of adoption, the majority of people report they have not received any form of AI training or education. Only two in five (39%) report some form of AI training, such as work-based AI training, formal or informal AI training outside of work, or completing a university-level course related to AI (such as computer science or data analytics; see Figure 3).

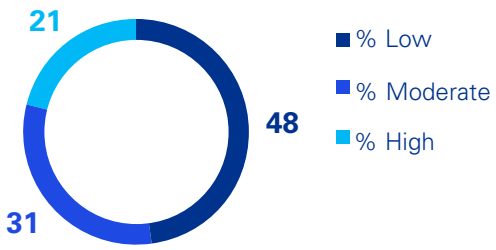
In line with these low levels of AI training, almost half (48%) report limited knowledge about AI, indicating that they do not feel they understand AI nor when or how it is used.[18] As shown in Figure 4, only one in five people report high levels of knowledge, and about a third report a moderate level.

### Figure 3: AI-related training or education




### Figure 4: Self-reported AI knowledge

'To what extent do you...
(a) Feel you know about AI?
(b) Feel informed about how AI is used?
(c) Think you understand when AI is being used?
(d) Feel you have the skills and knowledge necessary to use AI tools appropriately?'

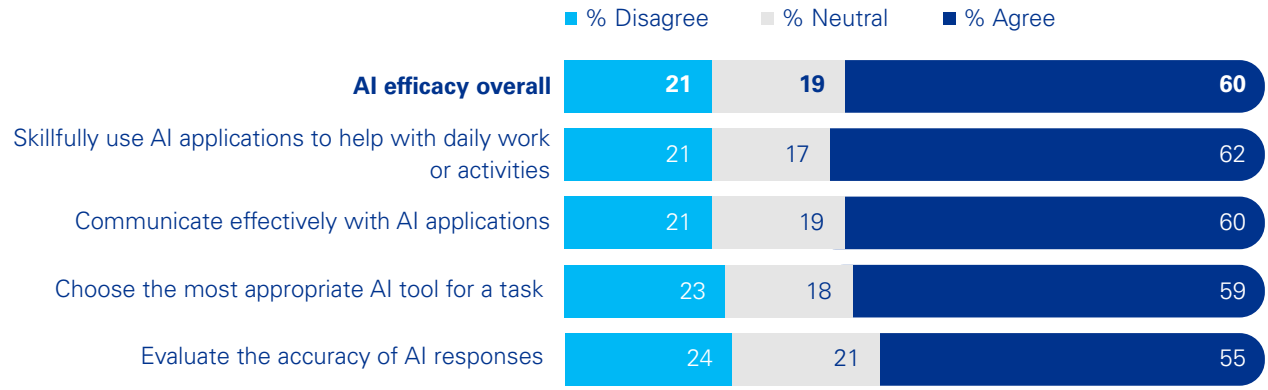



% Low = 'Not at all' or 'To a small extent'
% High = 'To a large extent' or 'To a very large extent'

Despite low levels of AI education, training and knowledge, 60 percent of people believe they can use AI effectively. This includes their ability to choose, use and communicate with AI systems to support everyday activities, and evaluate the accuracy of AI output (see Figure 5). This is likely because many AI tools and systems are designed to be intuitive to use and accessible to a broad range of people (via a mobile phone application, for example, and by using natural language to make requests), enabling these tools to be used widely with limited or no training. For example, AI voice assistants can be used simply by conversing with these tools.

### Figure 5: Self-reported AI efficacy

'To what extent do you agree with the following? I can…'




% Disagree = 'Strongly disagree', 'Disagree', 'Somewhat disagree'
% Agree = 'Somewhat agree', 'Agree', 'Strongly agree'

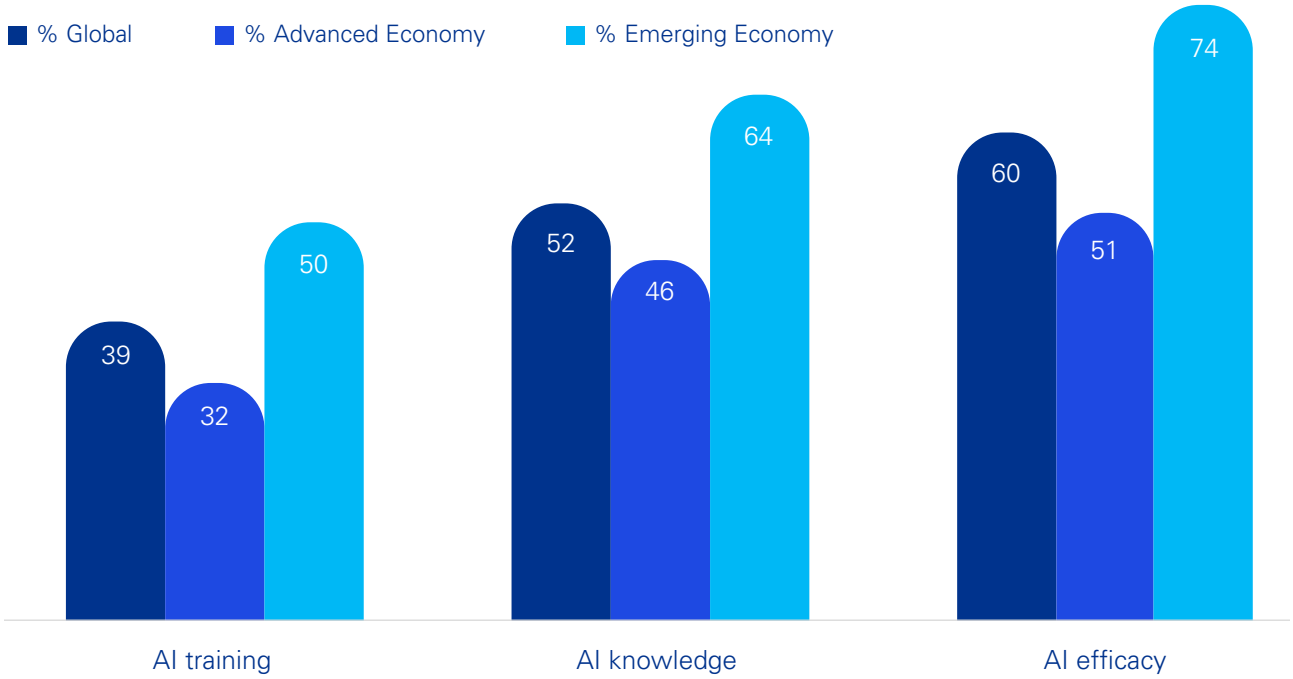
## AI training, knowledge, and efficacy are lowest in the advanced economies

In line with the distinct differences in the use of AI across economic groups, there are also pronounced differences between advanced and emerging economies when it comes to levels of AI training, knowledge, and efficacy.

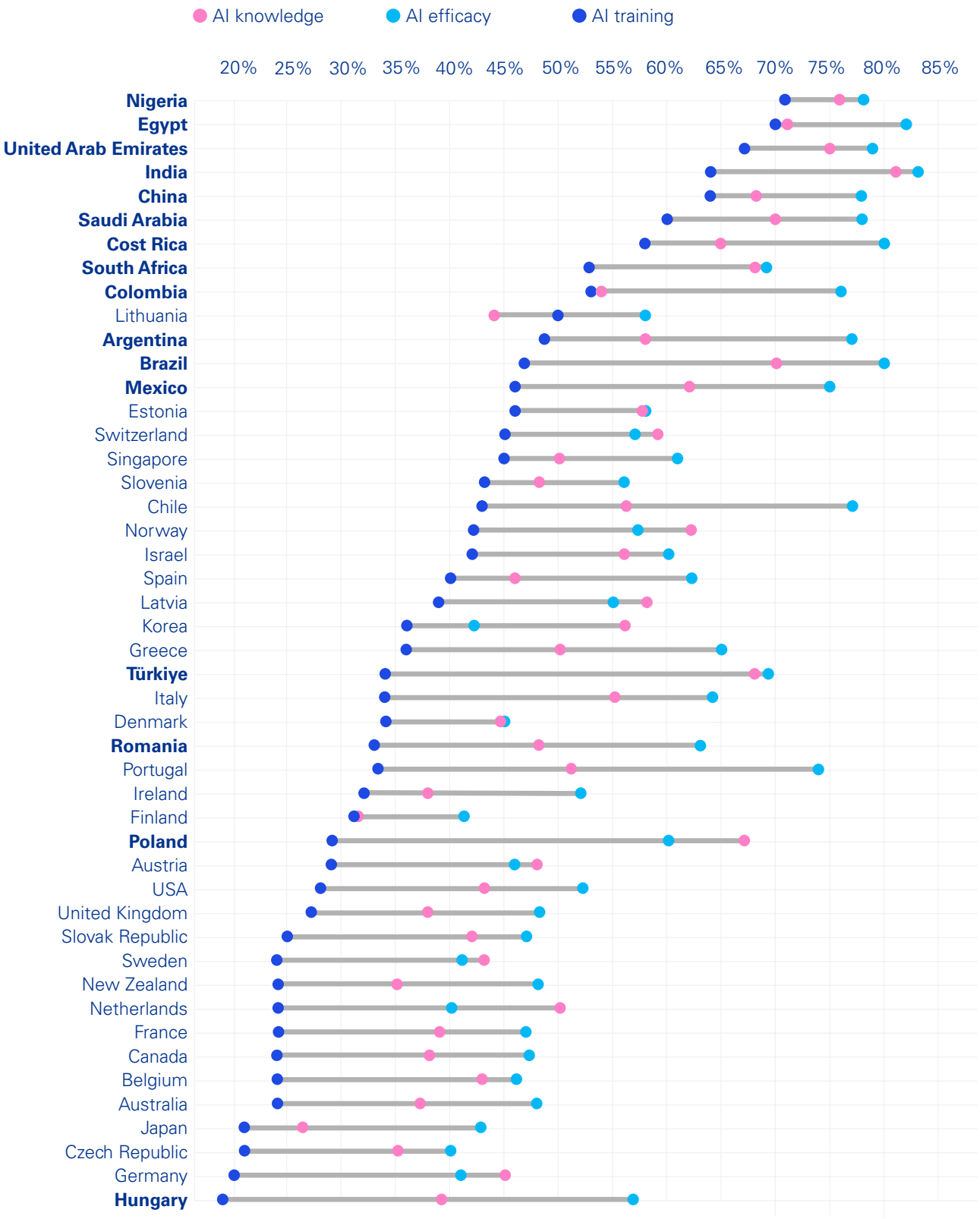
As shown in Figure 6, half of the people surveyed in emerging economies report having completed AI-related training or education, compared to less than a third in advanced economies. Similarly, almost two-thirds of people in emerging economies report moderate or high knowledge about AI, compared to less than half in advanced economies. Around three-quarters of those in the emerging economies feel they can use AI tools and systems effectively, compared to only half in advanced economies.

As shown in Figure 7, AI training, knowledge, and efficacy are particularly high in Nigeria, Egypt, the UAE, India, China and Saudi Arabia. These six countries also rate highest on AI use (see Figure 2). In contrast, AI training and knowledge are particularly low in Germany, the Czech Republic and Japan.

### Figure 6: AI training, knowledge and AI efficacy across economic groups



## Figure 7: AI knowledge, efficacy, and training across countries




% AI knowledge = '% To a moderate extent', '% To a large extent', '% To a very large extent'
% AI efficacy = '% Somewhat agree', '% Agree', '% Strongly agree'
% AI training = '% Selected University level course in AI', '% Selected Work-based training', or '% Selected Formal or informal training outside work'
Bolding indicates countries with emerging economies. Ordered by AI training.

## A third are unaware that AI enables common applications they use: half don't know AI is used in social media

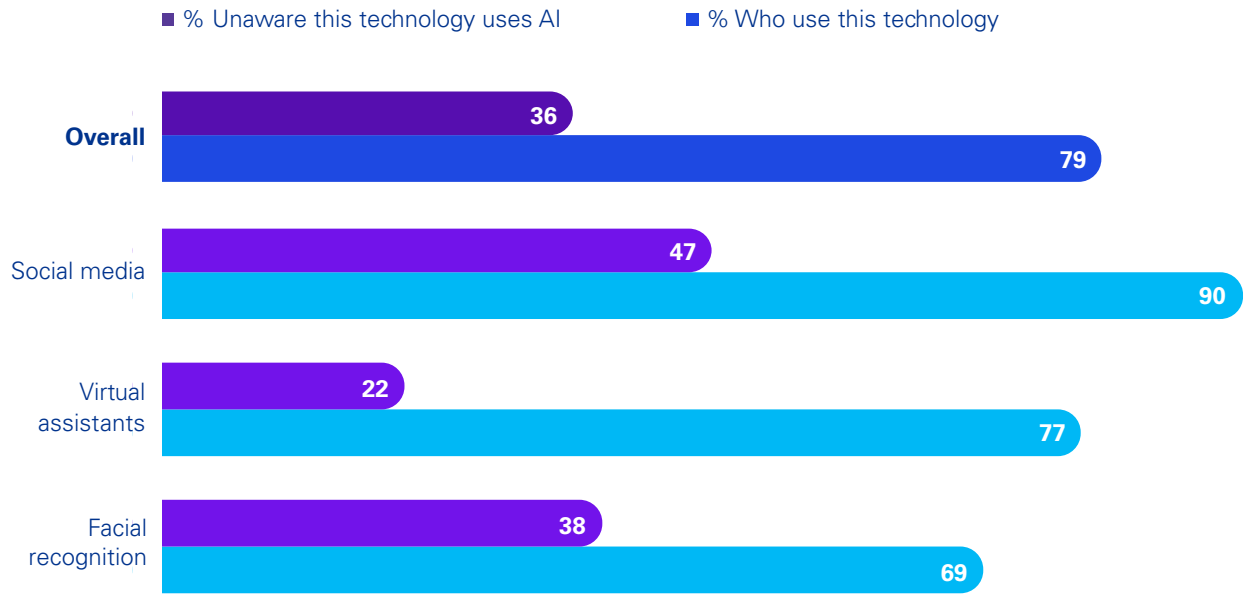
As an indicator of people's objective awareness of AI use, respondents were asked if they use the three common technologies shown in Figure 8, and whether these technologies are enabled by AI (i.e. whether these technologies rely on AI to function). Seventy-nine percent of people use these common AI-enabled technologies—highlighting the prevalence of AI technologies in people's lives—but over a third (36%) are unaware that these technologies use AI.

Use of the technology does not necessarily translate into an increased understanding of whether AI is part of it. For example, while the majority (90%) of the sample reports using social media, nearly half (47%) of all respondents are unaware of AI's role in social media. As shown in Figure 8, this pattern of using technology without realizing it relies on AI is particularly strong for social media, but also evident in facial recognition and virtual assistants—prompting the question of whether the awareness of AI's central role in these technologies would change how people engage with them.

People in emerging economies are more likely to be aware that AI is used in these technologies than those in advanced countries (70% vs. 61%), and they are also more likely to use these common AI-enabled technologies (88% vs. 74%).

### Figure 8: Use of common technologies and awareness that they involve AI

'For each technology below, please indicate if you have used it and if it uses AI'




## Self-reported understanding of AI has not changed over time and many are still unaware that AI is used in common applications like social media

Despite the rapid uptake of AI since 2022, there has been no overall substantive change in self-reported knowledge of AI (M=2.6 in 2022; M=2.6 in 2024). However, increases were found in four countries, Estonia, Brazil, China and South Africa, with the largest increases in Estonia (26% vs. 50%, M=2.1 vs. 2.8) and Brazil (38% vs. 63%, M=2.5 vs. 3.0).

Although use of AI in common technologies such as social media, facial recognition, and virtual assistants has tended to remain constant or increased in most countries, many are still unaware that these technologies rely on AI to function. For example, social media use has remained constant and high over time across countries (88% use at both time points), yet many are still unaware that AI is used in social media platforms (2022: 44% vs. 2024: 46%).

## Four in five want to learn more about AI, with interest highest in emerging economies

Most people (83%) are interested in learning more about AI, ranging from almost all (97%) in Nigeria to three in five (59%) in Australia.

In most emerging economies, over 90 percent of people express a desire to learn more about AI. In contrast, respondents in seven advanced economies (Australia, New Zealand, the USA, Canada, the UK, Japan and Finland) have considerably lower interest (ranging from 59-67%), compared to other countries. Australia and Finland are notably low, with two in five (41%) people reporting no or low interest in learning more about AI.

People with AI knowledge and efficacy tend to be more interested in learning more about AI (r=.48), suggesting a virtuous cycle where those who are already knowledgeable and confident in using AI are more eager to learn and thus more likely to deepen their understanding further. In contrast, those with low knowledge and efficacy may fall further behind.

In most emerging economies, over

**90%**

of people express a desire to learn more about AI

### In summary

Taken together, these findings indicate high rates of AI adoption by the public, coupled with comparably low levels of AI training and literacy. Low levels of AI literacy may limit people's ability to recognize the capabilities and applications of AI and thus fully realize benefits, and importantly, the ability to recognize the limitations of AI systems, critically evaluate their outputs, and guard against harm. For instance, social media users that are unaware of how algorithms shape content may fail to question the credibility or biases of algorithmically curated content and face increased vulnerability to misinformation and manipulation.

The findings also reveal accelerated uptake of AI tools and higher levels of AI literacy amongst people in emerging economies compared to advanced economies. This may be explained in part by the increasingly important role that emerging and transformative technologies play in the economic development of these countries.[19] As discussed in the next sections, people in emerging economies also tend to be more trusting, accepting, and positive about AI and experience the most benefits from its use, compared to those in advanced economies.

# To what extent do people trust and accept AI systems?

To answer this question, respondents were asked about their trust and acceptance of a range of AI systems, and the extent to which they perceive them to be trustworthy. They were also asked about the emotions they feel when it comes to AI applications.

Our approach to measuring trust in AI aligns with the following common definition of trust: a *willingness to be vulnerable* to an AI system (e.g. by relying on system recommendations or output or sharing personal data) based on *positive expectations* of how the system will operate (such as accuracy, helpfulness, data privacy and security).[20]

## People have more trust in the technical ability of AI systems to provide a helpful service but are more skeptical of its safety, security and impact on people

While most people use AI tools, many people have reservations about the trustworthiness of AI systems and their use in society.

On average, 58 percent of people view AI systems as trustworthy.[21] People have more faith in the technical ability of AI systems to provide accurate and reliable output and services (65%) than in their safety, security, impact on people, and ethical soundness (e.g. that they are fair, do no harm, and uphold privacy rights; 52%).

This difference is consistent across countries, as shown in Figure 9. To illustrate, in Finland—a country where trustworthiness is very low—half of the respondents view AI systems as providing a helpful service, yet only a third agree that these systems are safe and secure to use. By contrast, in Egypt—where AI is perceived as highly trustworthy—83 percent believe AI systems are accurate and provide a helpful service, while 72 percent agree that they are safe and secure to use.

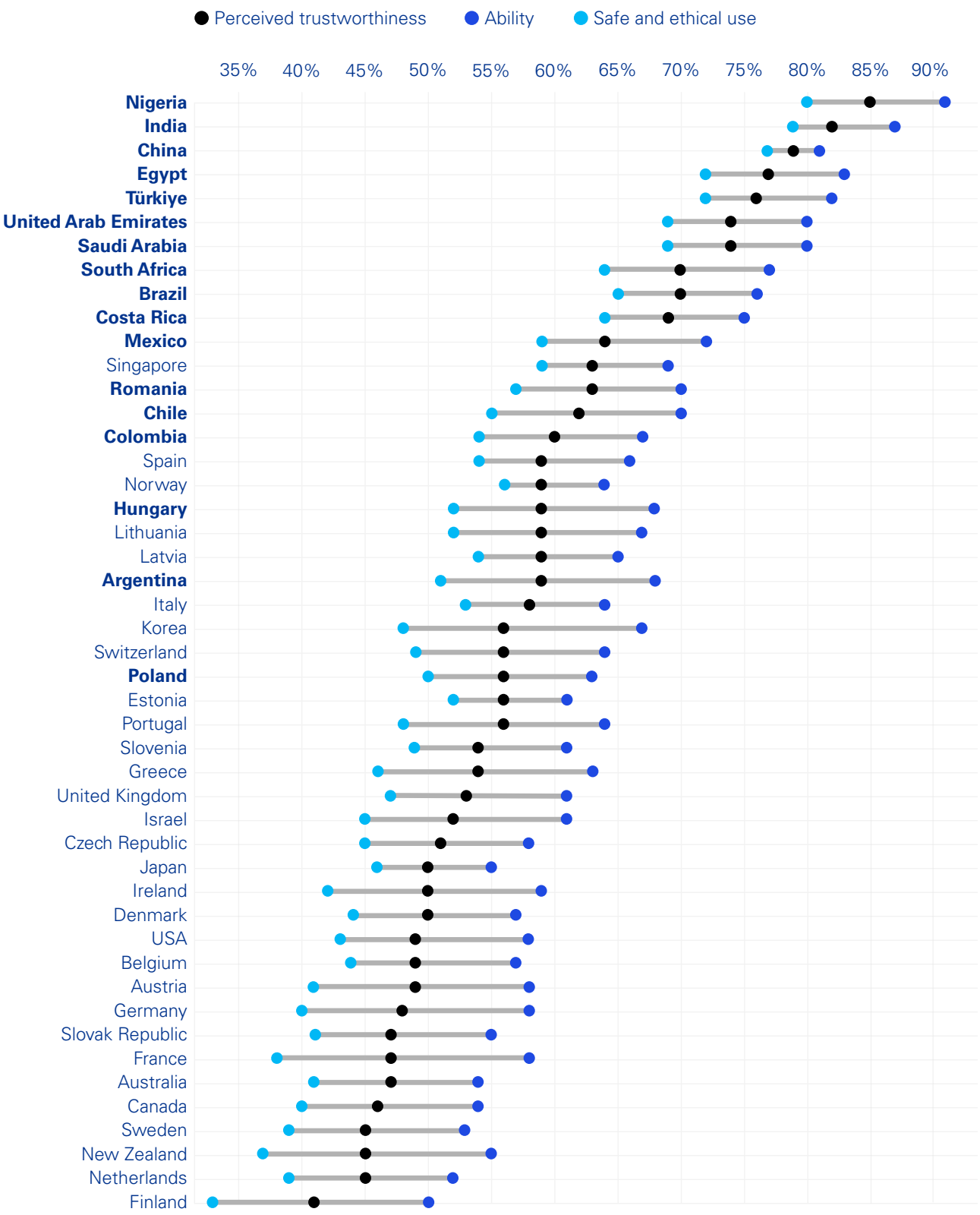
Trust is important because it underpins the acceptance and sustained adoption of AI. This is confirmed by our research: trust is associated with the acceptance and approval of AI systems (r=.70) and the use of AI (r=.48). People who trust AI systems are more likely to use them frequently.

### How trust in AI was measured

To understand how people view the trustworthiness of AI systems, we asked about two key components: the *technical ability* of AI (e.g. to provide accurate and reliable output and a helpful service), and *safe and ethical use* (e.g. to be safe and secure to use and ethically sound).

We also examined two primary ways people demonstrate trust in AI systems: *Reliance* assesses people's willingness to rely on an AI system's output, such as a recommendation or decision (i.e. to trust that it is accurate). *Information sharing* relates to the willingness to share information or data with an AI system (e.g. to provide personal information to enable the system to work or perform a service).

## Figure 9: Perceptions of the trustworthiness of AI systems




% Agree = 'Somewhat agree', 'Agree', 'Strongly agree'. Ordered by perceived trustworthiness.
Bolding indicates countries with emerging economies.

## Most people are ambivalent or unwilling to trust AI systems but accept their use

The concern about the safety and security of AI and its impact on people helps explain why a little over half (54%) of people are wary about trusting AI systems, reporting either ambivalence or an unwillingness to trust (see Figure 10). Only 46 percent are willing to trust AI systems.

As people's trust in AI may vary depending on the application of AI, we asked about trust in different AI use cases. As shown in Figure 10, there are similar levels of trust in generative AI tools, AI use in Human Resources, and AI systems in general (42-45% are willing to trust, Ms=3.9-4.0).

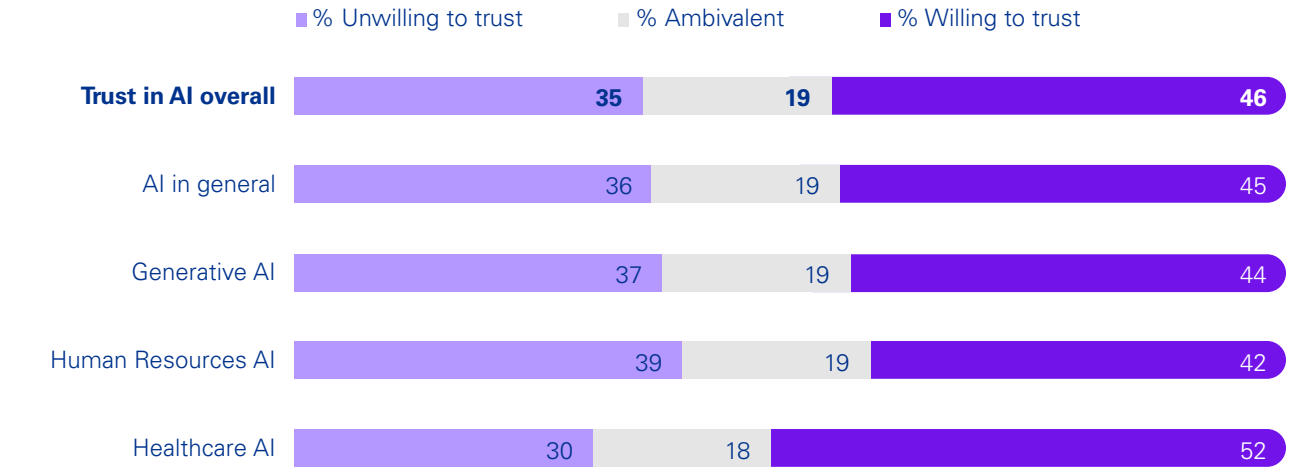
One difference is that people are more trusting of AI use in healthcare (52% willing, M=4.3), with healthcare the most trusted application in 42 of the 47 countries surveyed (see Figure 11).

This difference likely reflects the direct benefit that increased precision of medical diagnoses and treatments affords people, combined with generally high levels of trust in medical professionals in most countries.[22] These findings reinforce that people's trust of AI systems is contextual and can depend on the use case and their confidence in the organization that is deploying the AI system.

Most people report low or moderate acceptance and approval of the use of AI systems (see Figure 10), with moderate acceptance indicating a level of ambivalence in their acceptance of AI use. In contrast, a third report high acceptance and approval. Taken together, these findings show that the majority (72%) have at least some level of acceptance of AI use.

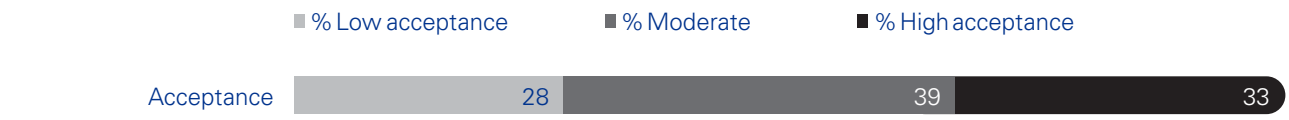
### Figure 10: Trust and acceptance of AI systems

'How willing are you to trust AI [specific application]?'



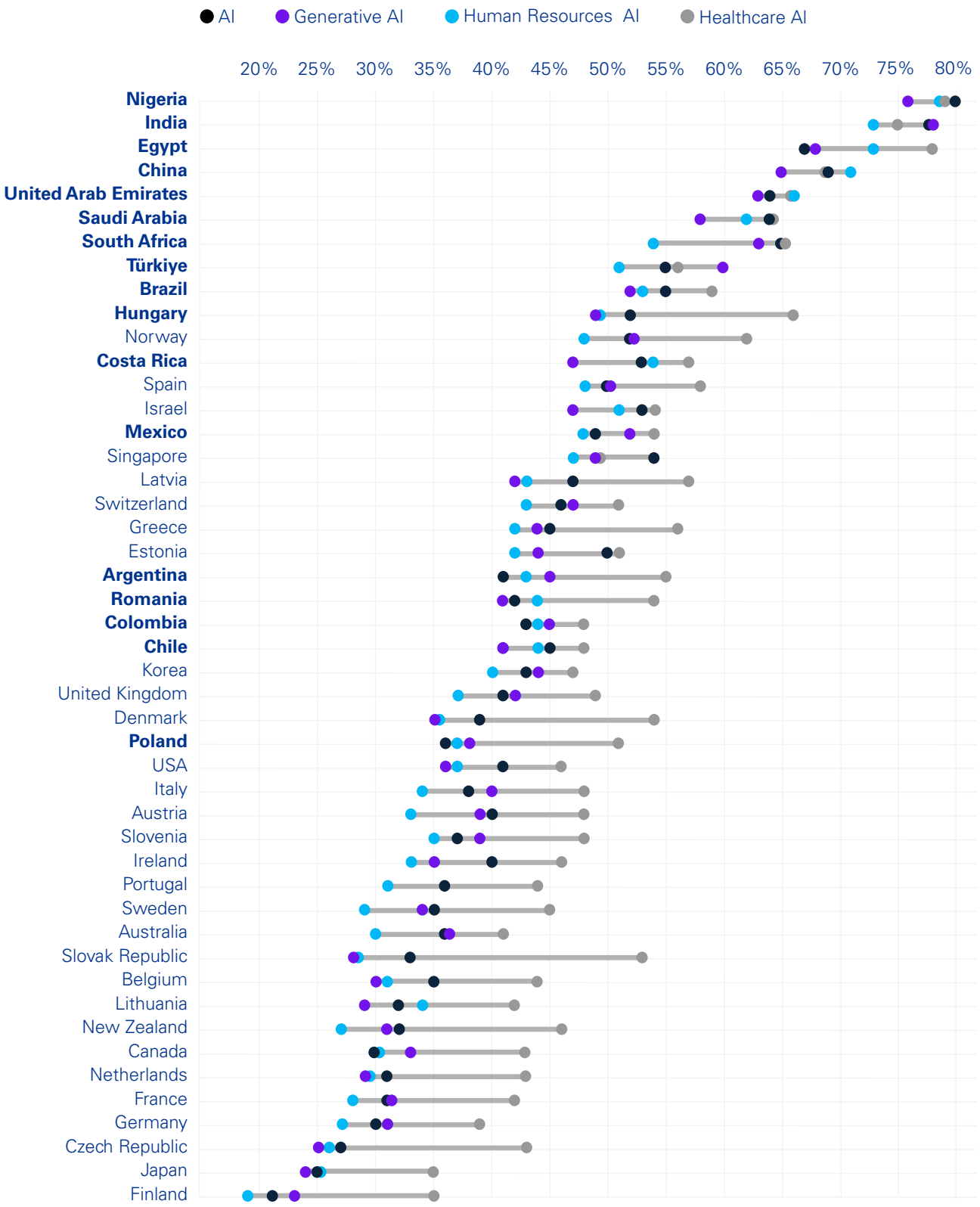

% Unwilling to trust = 'Somewhat unwilling', 'Unwilling', or 'Completely Unwilling'
% Ambivalent = 'Neither willing nor unwilling'
% Willing to trust = 'Somewhat willing', 'Willing', or 'Completely willing'

'To what extent do you accept/approve the use of AI [specific application]?'




% Low acceptance = 'Not at all' or 'Slightly'
% High acceptance = 'Highly' or 'Completely'

## Figure 11: Trust in AI applications across countries




% Willing to trust based on 'Somewhat willing', 'Mostly willing' and 'Completely willing'. Ordered by % Willing.
Bolding indicates countries with emerging economies.

## Trust and acceptance of AI is lower in advanced economies

As shown in Figure 12, trust and acceptance of AI systems are consistently lower in advanced economies compared to emerging economies. In advanced economies, two in five are willing to trust AI systems by relying on their output and sharing information with these systems. Half view AI systems as trustworthy, and two-thirds report at least moderate levels of acceptance.

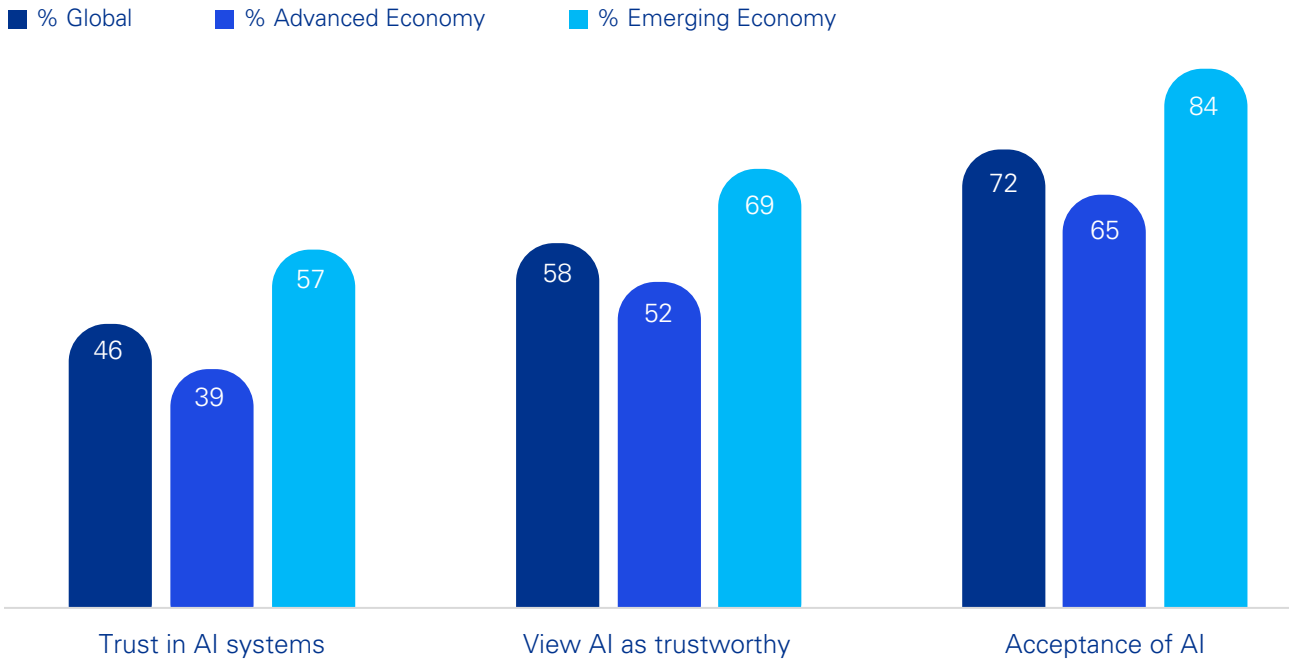
In contrast, people in emerging economies have more trust in AI systems, view them as more trustworthy, and have higher levels of acceptance and approval of their use. It is notable, however, that 43 percent of people in emerging economies remain ambivalent or unwilling to trust AI systems, highlighting that trust cannot be taken for granted.

To illustrate this distinction at the country level, as shown in Figure 13, over half of the people surveyed trust AI systems in 12 of the 17 emerging economies (ranging from 41 percent in Poland to 79 percent in Nigeria). Trust and acceptance are particularly high in the six emerging economies of Nigeria, India, Egypt, China, the UAE, and Saudi Arabia—with over 60 percent of people willing to trust AI and at least 49 percent reporting high acceptance. These countries also have the highest levels of AI use and AI literacy, as previously reported.

In contrast, less than half trust AI systems in 25 of the 29 advanced economies. Of the advanced economies, trust is highest in Norway,[23] Spain, Israel, and Singapore (all over 50 percent willing to trust). In contrast, Finland and Japan rate the lowest on trust (25-28%) while New Zealand and Australia (15-17% high acceptance) rank lowest on acceptance.

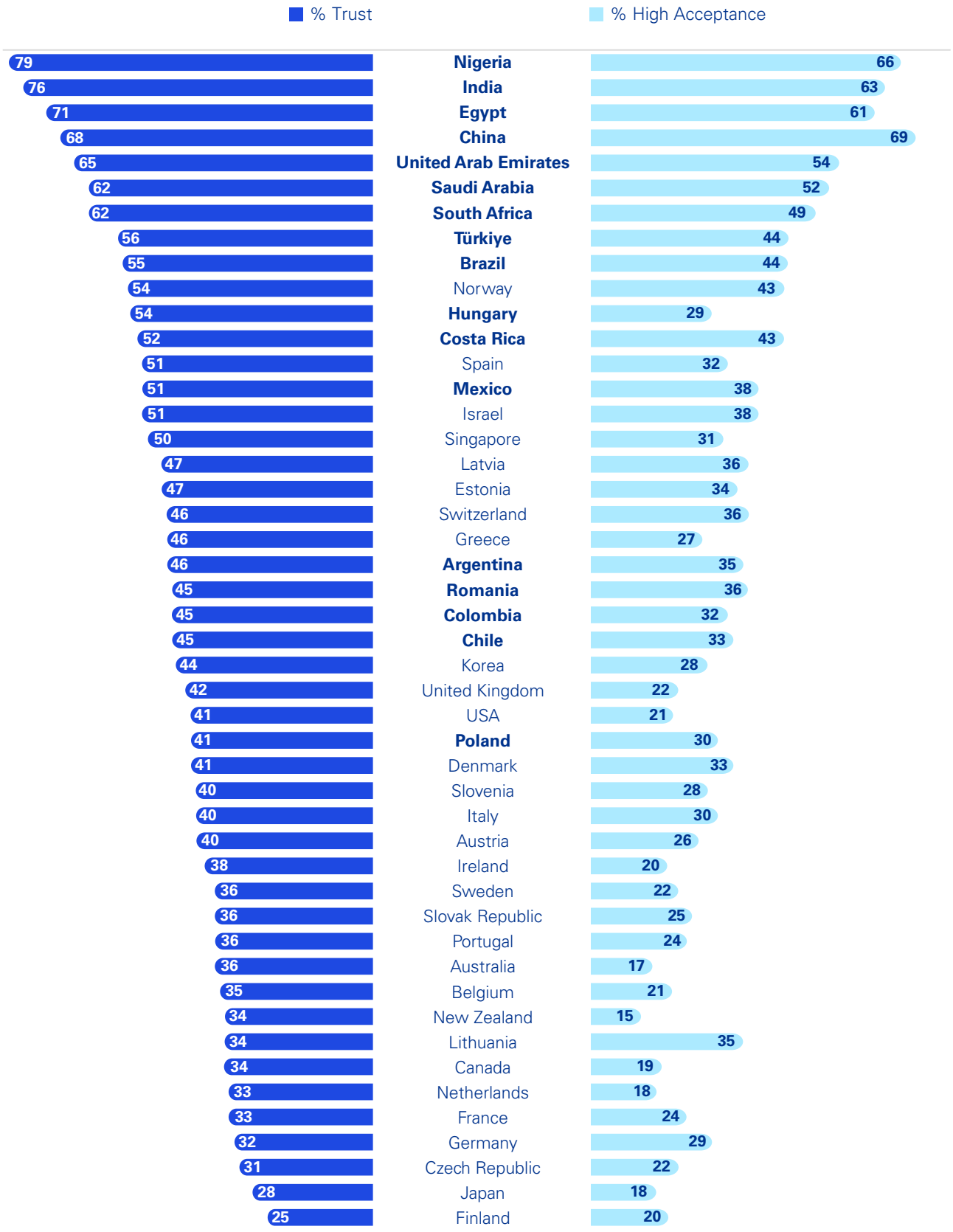
The higher trust and acceptance of AI in emerging economies is reflected in the accelerated uptake of AI in these countries.[24]

### Figure 12: Trust and acceptance of AI systems across economic groups




Trust = % 'Somewhat willing', 'Mostly willing', 'Completely willing'
Trustworthy = % 'Somewhat agree', 'Agree', 'Strongly agree' trustworthy
Acceptance = % 'Moderately', 'Highly', 'Completely' accept

## Figure 13: Trust and acceptance of AI systems across countries




% Trust = 'Somewhat willing', 'Mostly willing' or 'Completely willing'
% High acceptance = 'Highly' or 'Completely'
Bolding indicates countries with emerging economies.

## People have mixed emotions about AI: both optimism and worry prevail

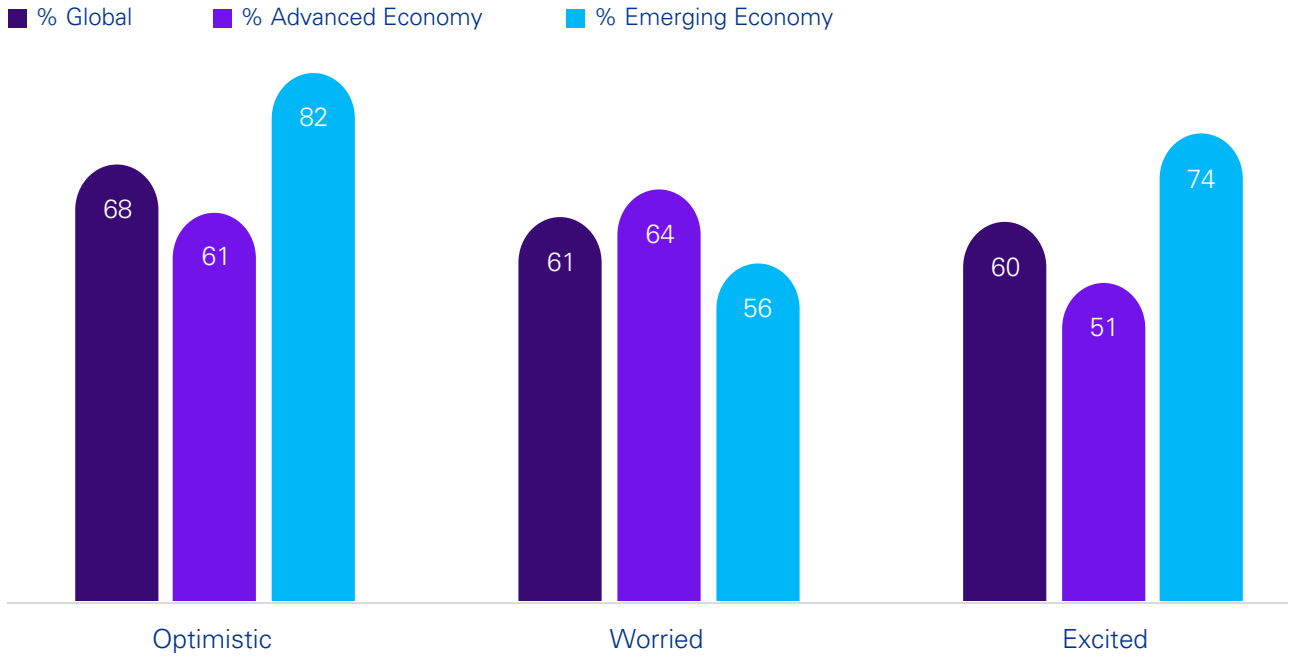
People feel a range of emotions about AI applications. As shown in Figure 14, the majority feel optimistic and excited, while also worried—demonstrating a degree of emotional ambivalence.

People in emerging economies report more positive emotions toward AI and a clear divergence between positive and negative sentiment. Optimism and excitement are dominant emotions in emerging economies, experienced by 74-82 percent of people. Significantly fewer (56%) feel worried.

In contrast, people in advanced economies feel both worried and optimistic in almost equal measure (61-64%), with just over half (51%) feeling excited.

### Figure 14: Emotions associated with AI

'In thinking about AI [specific application], to what extent do you feel…'

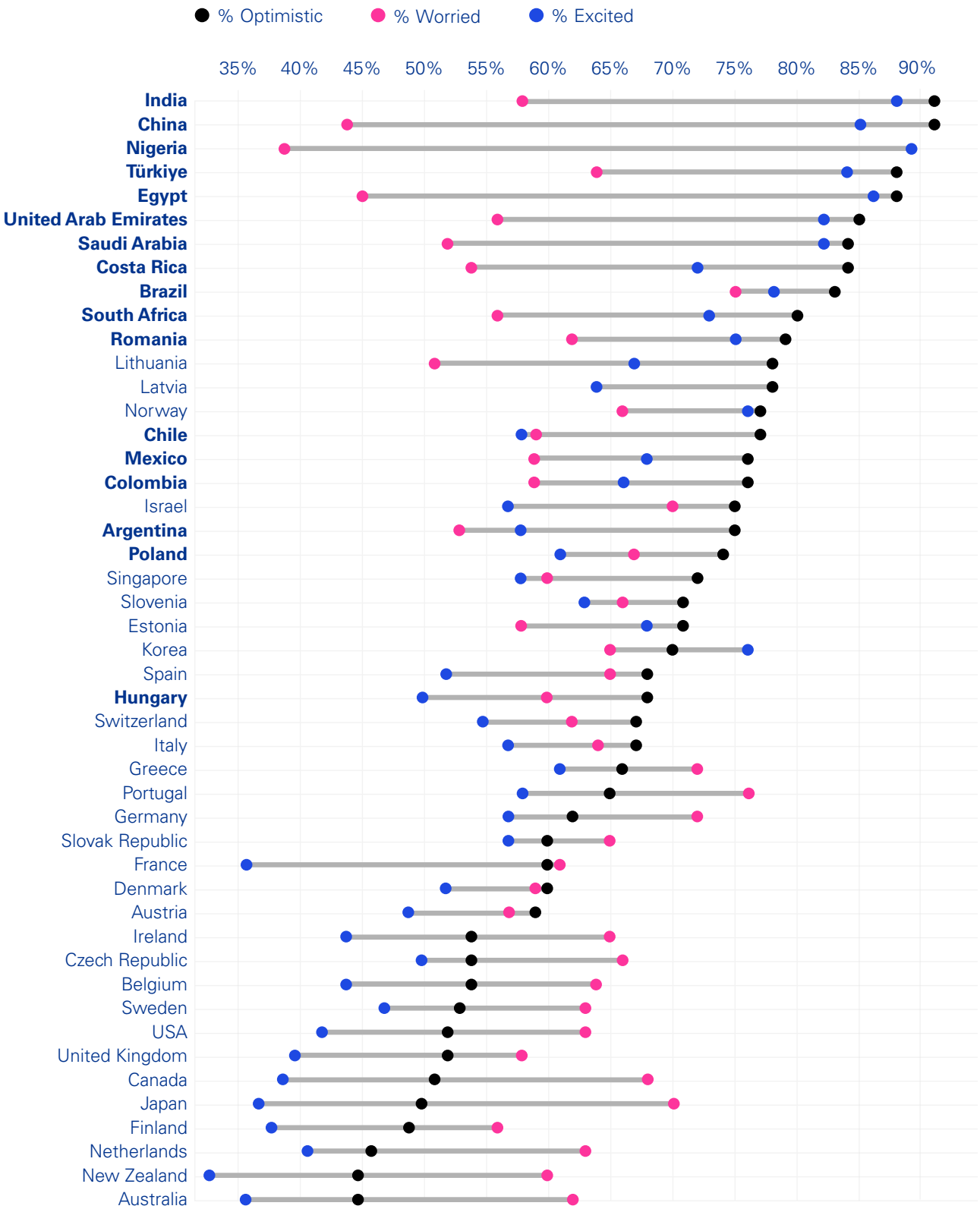



Each emotion was measured on a 5-point scale, with the above figure displaying % Moderate to High = 'Moderately', 'Very' or 'Extremely'

Reinforcing this pattern, Figure 15 shows emotions about AI applications at the country level. People in many advanced economies feel more worried than optimistic or excited, whereas optimism and excitement dominate in most emerging economies. To illustrate, 70 percent of people in Japan feel worried and only 37 percent are excited. In contrast, over 80 percent of people in China feel optimistic and excited about AI applications, while only 43 percent feel worried.

At least half of respondents feel worried about AI in all but three countries, underscoring that worry about AI often coexists with optimism and excitement in many countries.

## Figure 15: Emotions toward AI across countries




% based on: % Moderately, % Very and % Extremely. Ordered by % optimistic.
Bolding indicates countries with emerging economies.

## Trust in AI systems has decreased over time and worry has increased

The perceived trustworthiness of AI systems decreased over time from 63 percent of people viewing AI systems as trustworthy in 2022 to 56 percent in 2024 (M=4.8 vs. M=4.6; see Figure 16). This demonstrates that many are feeling less positive about the ability of AI systems to provide accurate and reliable output, and be safe, secure and ethical to use. Perceived trustworthiness decreased in 13 of the 17 countries, with the largest decreases in Israel (68% to 52%) and South Africa (76% vs. 62%).

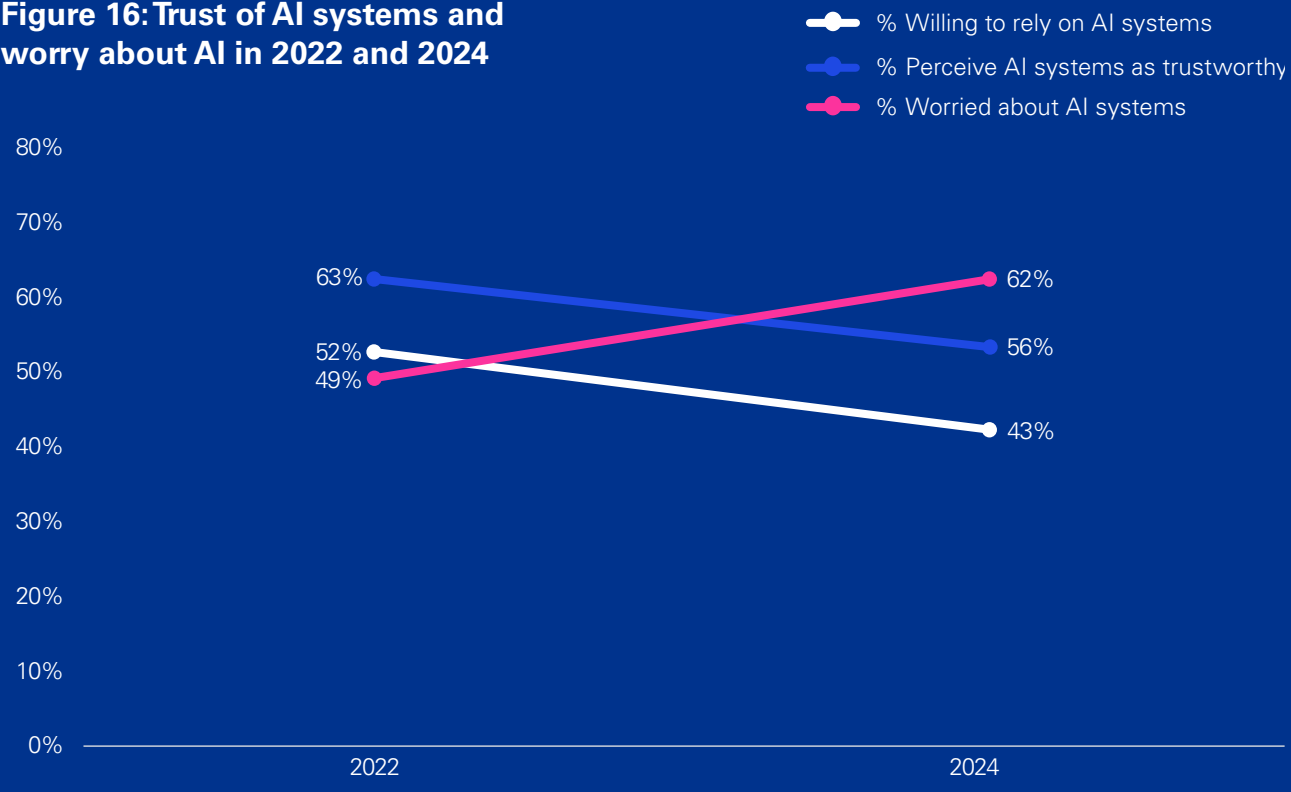
Similarly, people's willingness to rely on AI systems decreased on average from 52 percent in 2022 to 43 percent in 2024 (M=4.3 vs. M=4.0; see Figure 16), with decreases in 12 of the 17 countries. The largest decreases occurred in Japan (43% to 21%) and Brazil (67% to 53%).

This likely reflects that with increased use and exposure to AI systems, people have become more aware of their capabilities and limitations, prompting a more considered reliance on these tools.

Over this same period, there is a striking increase in the number of people feeling worried about AI systems, rising from almost half (49%) of respondents in 2022 to 62 percent in 2024 (M=2.4 to M=3.0). This increase was found in 15 of the 17 countries, with the largest increases in Brazil (49% in 2022 vs. 75% in 2024) together with Israel, Estonia, the Netherlands and Finland (ranging from 21-26% increase in worry).

In 11 of the 17 countries, people also feel less excited about AI systems, with the largest difference in France, where just 35 percent feel excited about AI in 2024 (M=2.0) compared to 58 percent in 2022 (M=2.6). The only country where excitement increased is Korea, where 75 percent report feeling excited in 2024, compared to 57 percent in 2022 (M=3.2 vs. M=2.5).

### Figure 16: Trust of AI systems and worry about AI in 2022 and 2024




Willing to rely on AI systems = 'Somewhat willing', 'Willing', or 'Completely willing'
Perceived trustworthiness of AI systems = aggregate 'Somewhat agree', 'Agree', or 'Strongly agree'
Worried about AI systems = 'moderately', 'very', 'extremely'

## In summary

Overall, the findings reveal considerable ambivalence toward the use of AI systems in society, stemming from the tension that people are less trusting of the safety and security of using AI systems and their impact on society, but are more trusting of their technical ability to provide a helpful service. This tension is reflected in low and ambivalent trust of AI, moderate acceptance, and the coexistence of optimism with worry, particularly for people in advanced economies. Moreover, trust in AI has declined over time, while worry has increased. The next section examines how this ambivalent trust is shaped by perceptions and experiences of the benefits and risks of AI systems.

# How do people view and experience the benefits and risks of AI?

To help answer this question, we asked the extent to which people perceive and have observed or experienced beneficial or negative outcomes from AI, and if they feel the benefits of AI applications outweigh the risks.

## People expect and are experiencing a broad range of benefits from AI

Most people (83%) believe the use of AI will result in a wide range of benefits, as shown in Figure 17. Importantly, 73 percent of people are personally *experiencing* or *observing* these benefits.[25]

The most commonly expected benefits are also some of the most realized, with over three quarters reporting they have experienced or observed improved efficiency and effectiveness, reduced time spent on mundane or repetitive tasks and improved levels of accessibility to information or services.[26] Increased fairness due to the use of AI (e.g. by reducing human bias) is the least commonly realized benefit, but it is still experienced or observed by over half of respondents (54%).

The utility of AI and people's lived experience of its benefits help explain the widespread use, adoption and qualified acceptance of AI technologies, despite the trust concerns. The positive benefits experienced are largely performance oriented—in line with our finding that people are more trusting of AI's ability to provide a helpful service and output.

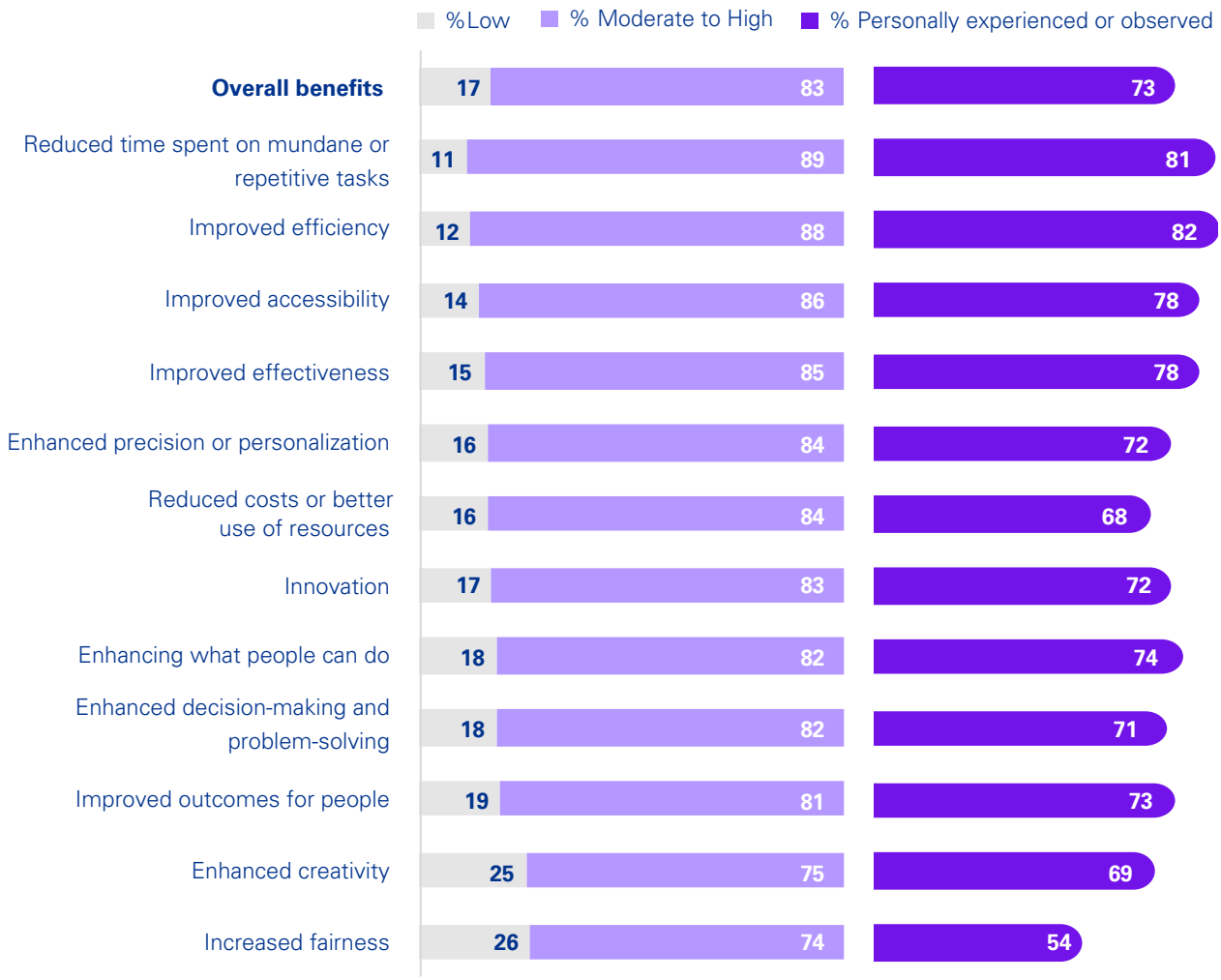
People who expect and experience or observe benefits from AI are more likely to trust (r=.42-.57), accept (r=.41-.63), and use AI (r=.40-.41). They are also more likely to have AI training or education (r=.25), AI knowledge (r=.31-.38), and AI efficacy (r=.38-.45).

**73%**

are personally *experiencing* or *observing* benefits of AI.

## Figure 17: Expected and experienced benefits of AI use

'I expect the use of AI [specific application] will result in these potential positive outcomes'




% Low = 'Not at all' or 'To a small extent'
% Moderate to High = 'To a moderate extent', 'To a large extent' or 'To a very large extent'

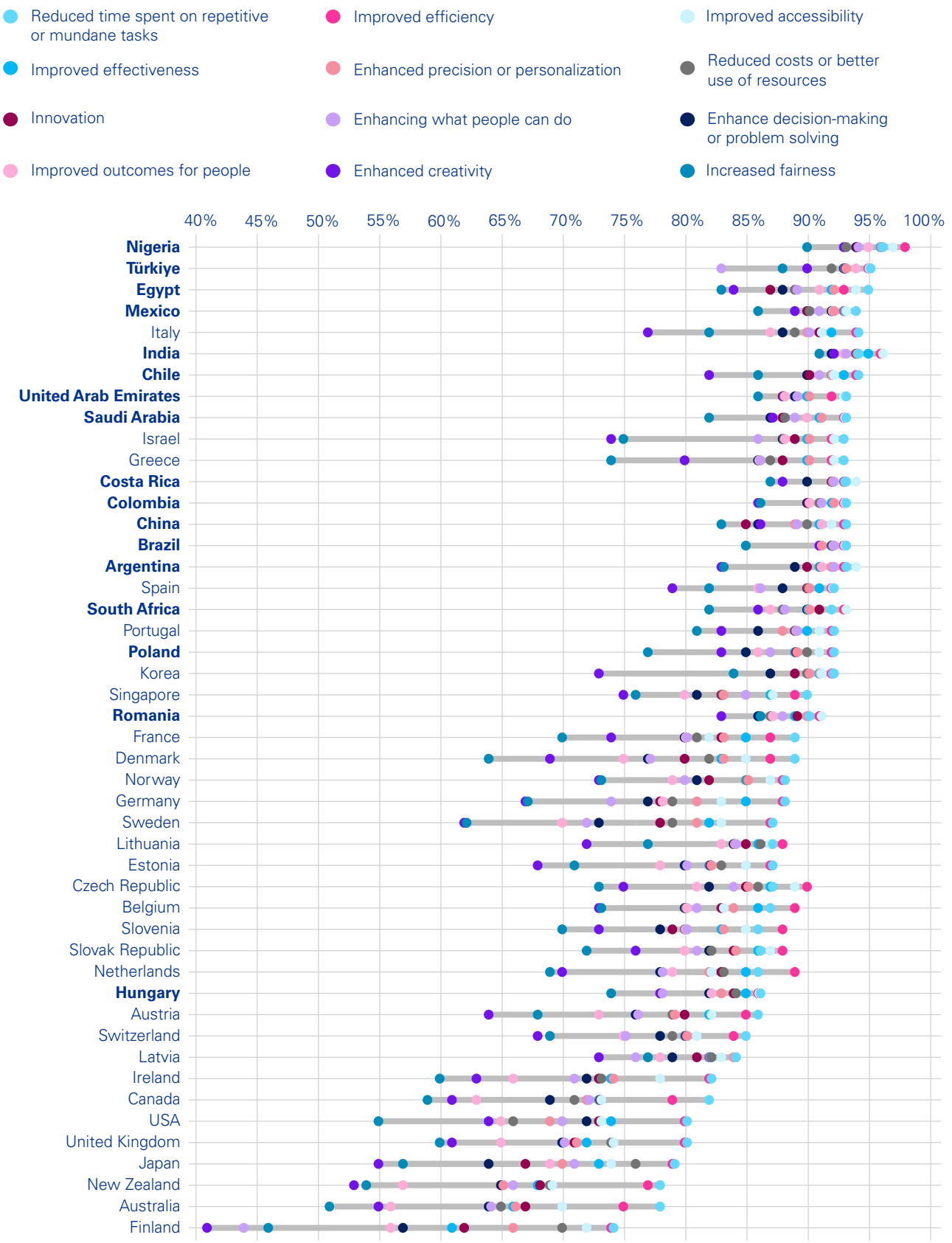
## People in emerging economies are more likely to expect and realize the benefits of AI

Ninety percent of people in emerging economies expect benefits from AI applications, compared to 79 percent in advanced economies. As shown in Figure 18, people in emerging economies have the most positive expectations of the benefits of AI. For instance, 95 percent of people in Nigeria expect a wide range of benefits. In contrast, fewer people expect benefits from AI in several advanced economies, particularly Australia, Canada, Finland, Japan, New Zealand, the UK and the USA.

The majority of people in emerging economies are also more likely to have observed or experienced AI benefits (82% vs. 65% in advanced economies). The largest differences between economies relate to the benefits of increased fairness (66% vs 43%), enhanced creativity (80% vs 59%), and improved outcomes for people (84% vs 64%).

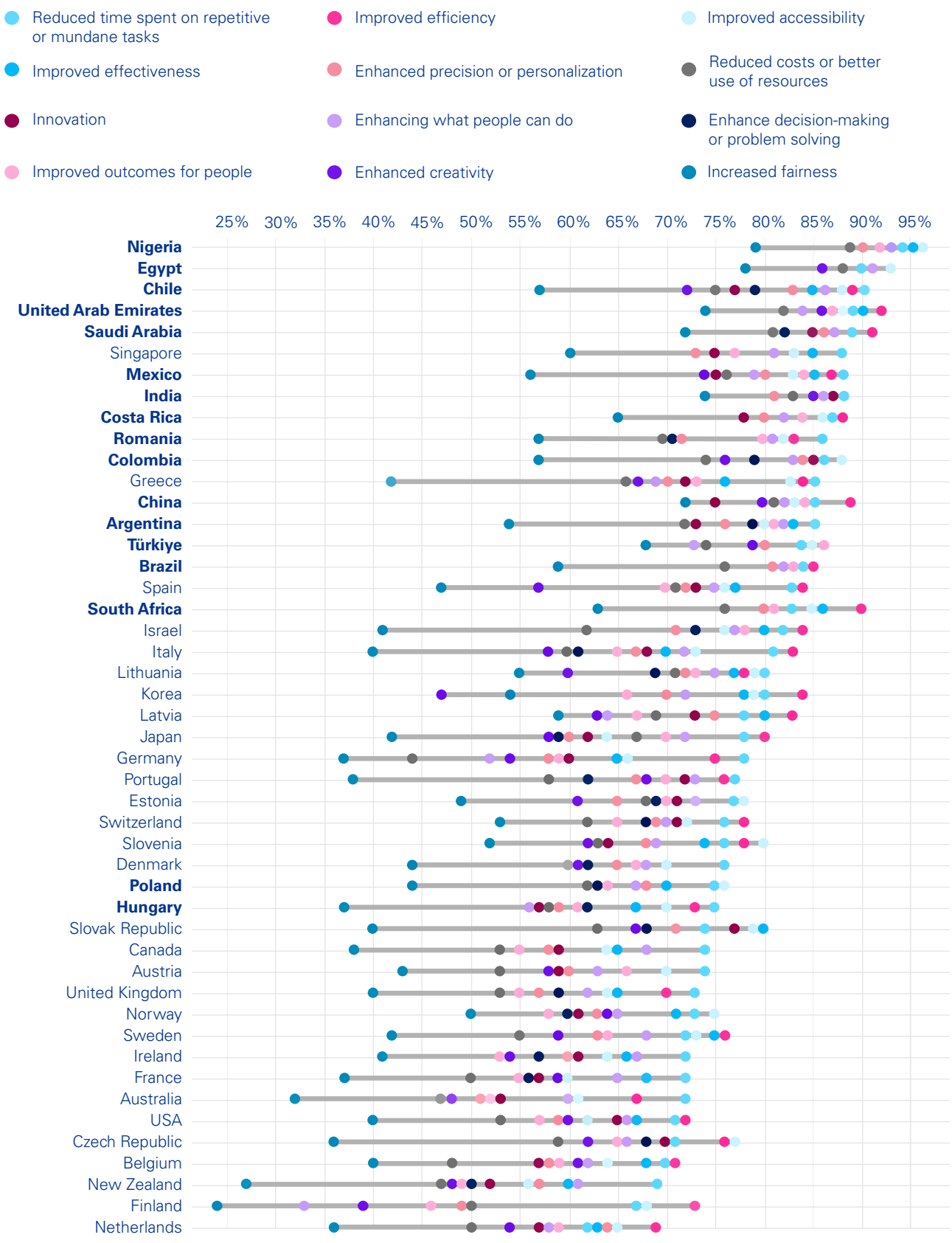
AI systems may be perceived and experienced as more beneficial in emerging economies because of their ability to fill critical resource gaps and provide greater relative opportunities to people. For instance, the use of AI systems in healthcare has the potential to enhance service delivery and improve health outcomes in areas where there is limited access to medical professionals.

## Figure 18: Expected benefits of AI across countries




Based on % Moderate to High = 'To a moderate extent', 'To a large extent' or 'To a very large extent'
Ordered by 'Reduced time spent on repetitive or mundane tasks'. Bolding indicates countries with emerging economies.

## Figure 19: Experienced benefits of AI across countries




Based on % Yes. Ordered by 'Reduced time spent on repetitive or mundane tasks'.
Bolding indicates countries with emerging economies.

## People are concerned about a range of negative outcomes from AI use and two in five are experiencing negative outcomes

While many of those surveyed are experiencing significant benefits from AI use, the majority (79%) are also concerned about a broad range of risks and negative outcomes from AI use (see Figure 20). Many of these risks are at the societal level, impacting society broadly rather than having isolated impacts on the individuals who use AI.[27]

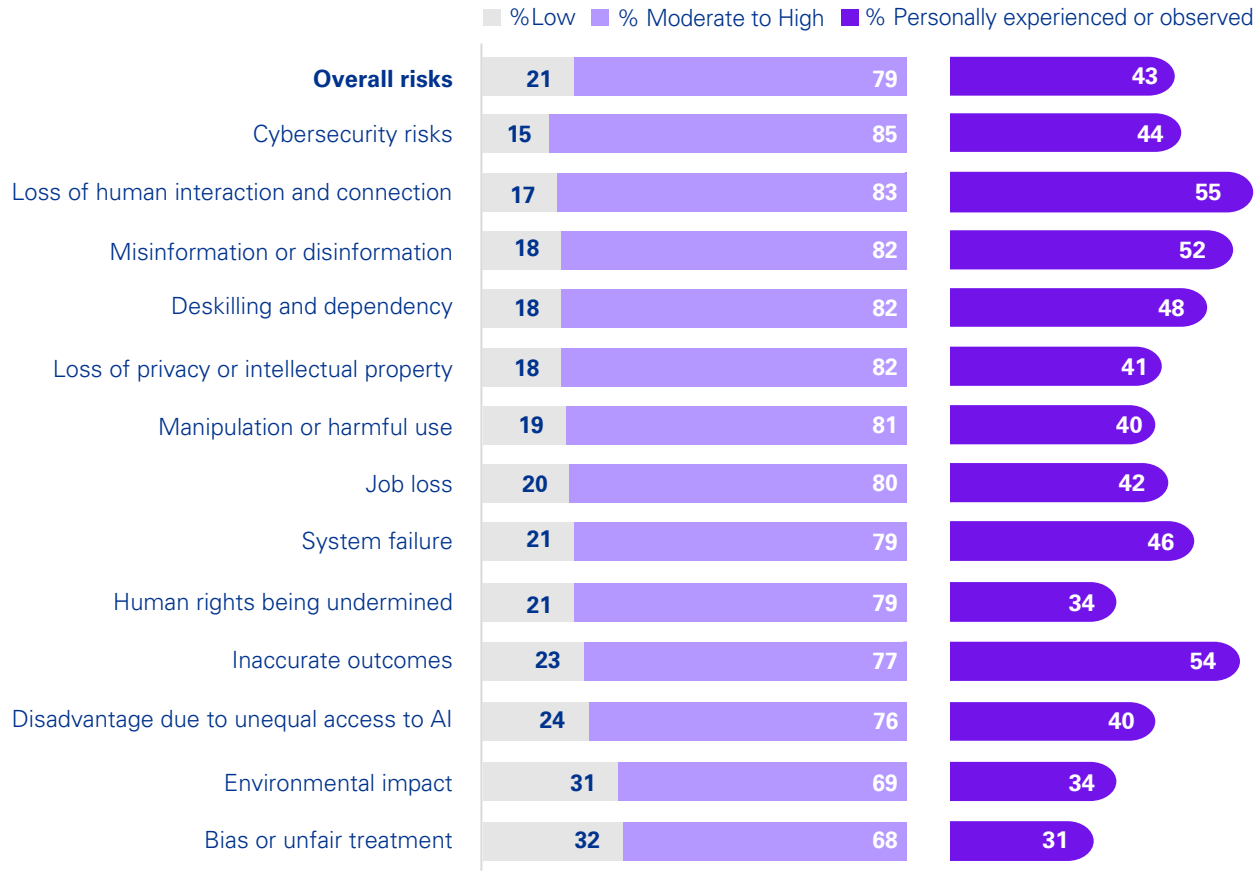
Cybersecurity risk (e.g. from hacking or malware) is a dominant concern raised by 85 percent of people, together with the loss of human interaction and connection (e.g. losing the option to speak with a human service provider). Other risks raised by over 80 percent of people include misinformation and disinformation (e.g. AI used to spread misleading or false information and deepfakes), manipulation or harmful use, loss of privacy or intellectual property (IP), deskilling and dependency, and job loss.

In comparison, people are less concerned about the risk of bias or unfair treatment from AI use or the environmental impact (68-69%). This may reflect a lack of awareness of the potential for AI systems to codify existing biases in datasets, and the high energy usage required to develop some AI systems and power the data centers they rely on. Although the percentages are lower, bias and environmental impact remain clear concerns for more than two thirds of people.

In addition to being concerned about the risks of AI applications, two in five have personally experienced or observed these negative outcomes (43%; see Figure 20). The loss of human interaction and connection, inaccurate outcomes, and misinformation and disinformation are the most commonly experienced negative outcomes from AI (52-55%). Bias or unfair treatment is the least commonly experienced or observed outcome, but it was still experienced by almost a third of people.

### Figure 20: Perceived risks and experienced negative outcomes from AI use

'How concerned are you about these potential negative outcomes of AI [specific application]?'




% Low = 'Not at all' or 'To a small extent'
% Moderate to High = 'To a moderate extent', 'To a large extent' or 'To a very large extent'

## The risks of AI are viewed and experienced in a comparable way across countries

In contrast to the differences across countries in how people view the benefits of AI, there are few differences across countries in people's concerns about the risks: the same proportion of people are concerned about negative outcomes from AI in both advanced and emerging economies (79% and 78%, respectively) and the majority of people in all countries report moderate or high concern about these risks (ranging from 67% in China to 87% in Greece).

As shown in Figure 21, the top concerns in almost all countries are either cybersecurity risks or the loss of human connection. China, Egypt, Nigeria, Saudi Arabia and South Africa are the exceptions, where job loss is the primary or an equal concern. There are also commonalities in what people are least concerned about, with either the environmental impacts of AI or the potential risk of bias from AI ranking last in every country.

The experience or observation of negative outcomes is also similar across economies (Emerging: 46% vs. Advanced: 40%). However, as shown in Figure 22, there is a trend for people in emerging economies to be more likely to have experienced or observed job loss due to AI (46% vs. 34% in advanced economies).

## People in emerging economies are more likely to believe the benefits of AI outweigh the risks: opinion is divided in advanced countries

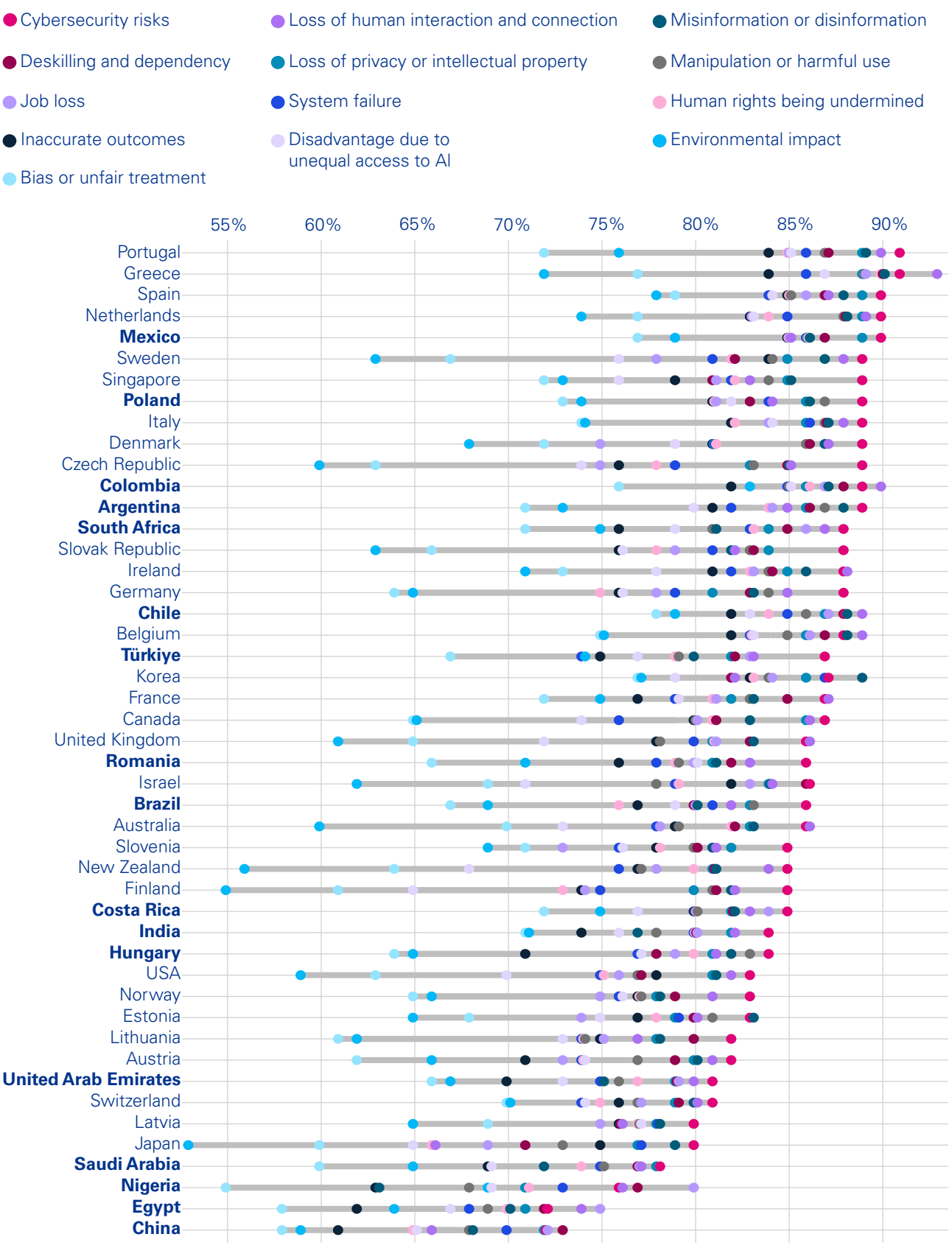
Globally, 42 percent of people believe the benefits of AI outweigh the risks, compared to 32 percent who believe the risks outweigh the benefits, and 26 percent who believe benefits and risks are balanced. This aligns with the finding that more people report experiencing benefits from AI than negative outcomes.

However, there are significant country differences in how people perceive the balance between AI risks and benefits. Half of people in emerging economies believe benefits outweigh risks, but opinions are more divided in advanced economies, where 38 percent believe the benefits outweigh risks and an almost equal number (37%) believe the risks outweigh the benefits. This aligns with the previously reported finding that more people in emerging economies expect and experience benefits from AI.

As shown in Figure 23, over 60 percent believe benefits outweigh risks in Nigeria, China, and Egypt (from 61% in Egypt to 74% in Nigeria). In contrast, a third or less agree that the benefits outweigh the risks in Australia, New Zealand, the Netherlands, Sweden, Finland, Canada, Ireland, and France.

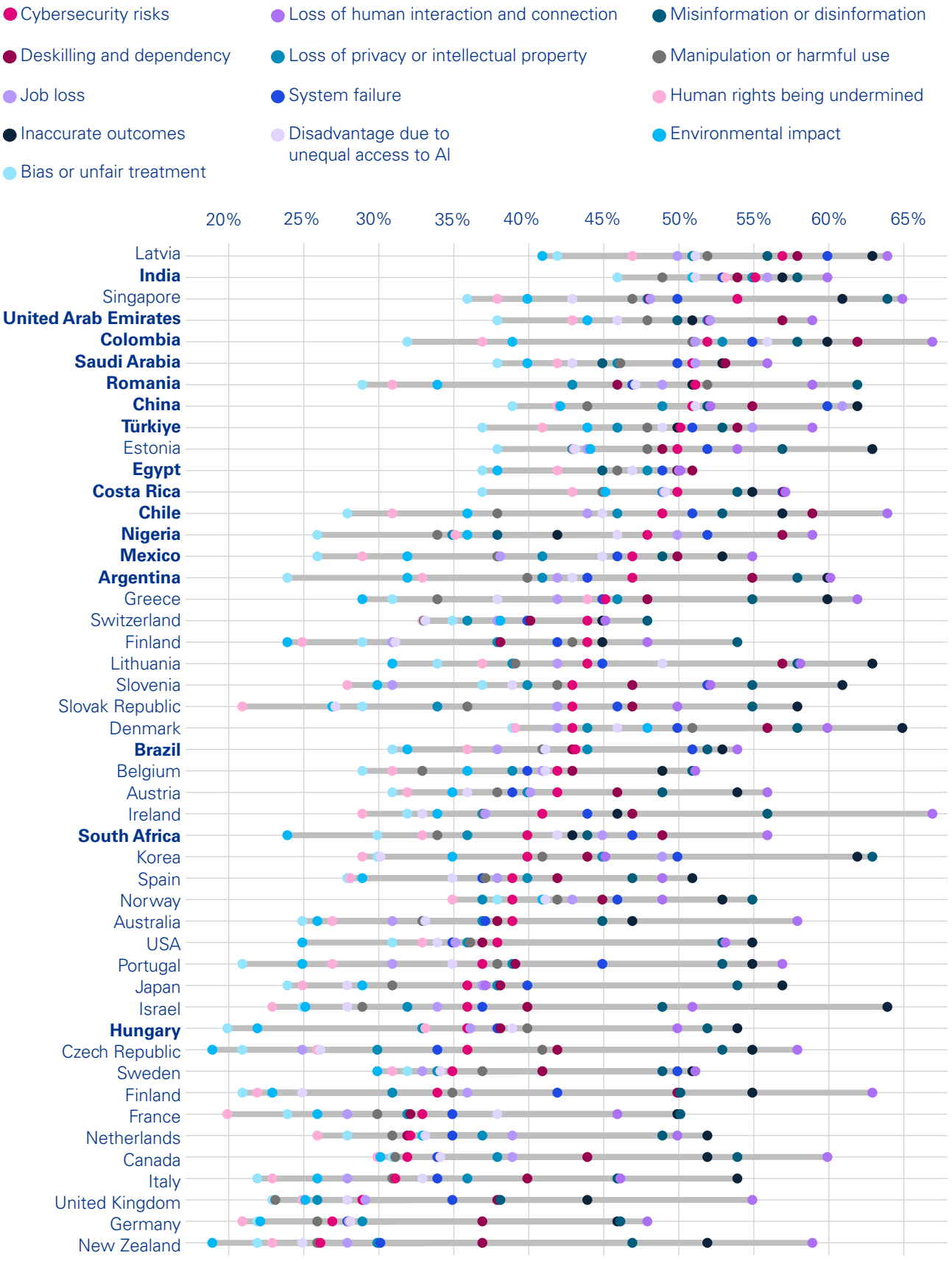
Although perspectives on AI vary across economies, in no country does the belief that AI risks outweigh the benefits reach 50 percent. This suggests that, despite concerns, most people in all countries acknowledge the benefits of AI systems.

## Figure 21: Concerns about the risks of AI across countries




Based on % Moderate to High= 'To a moderate extent', 'To a large extent' or 'To a very large extent'
Ordered by %'Cybersecurity risks'. Bolding indicates countries with emerging economies

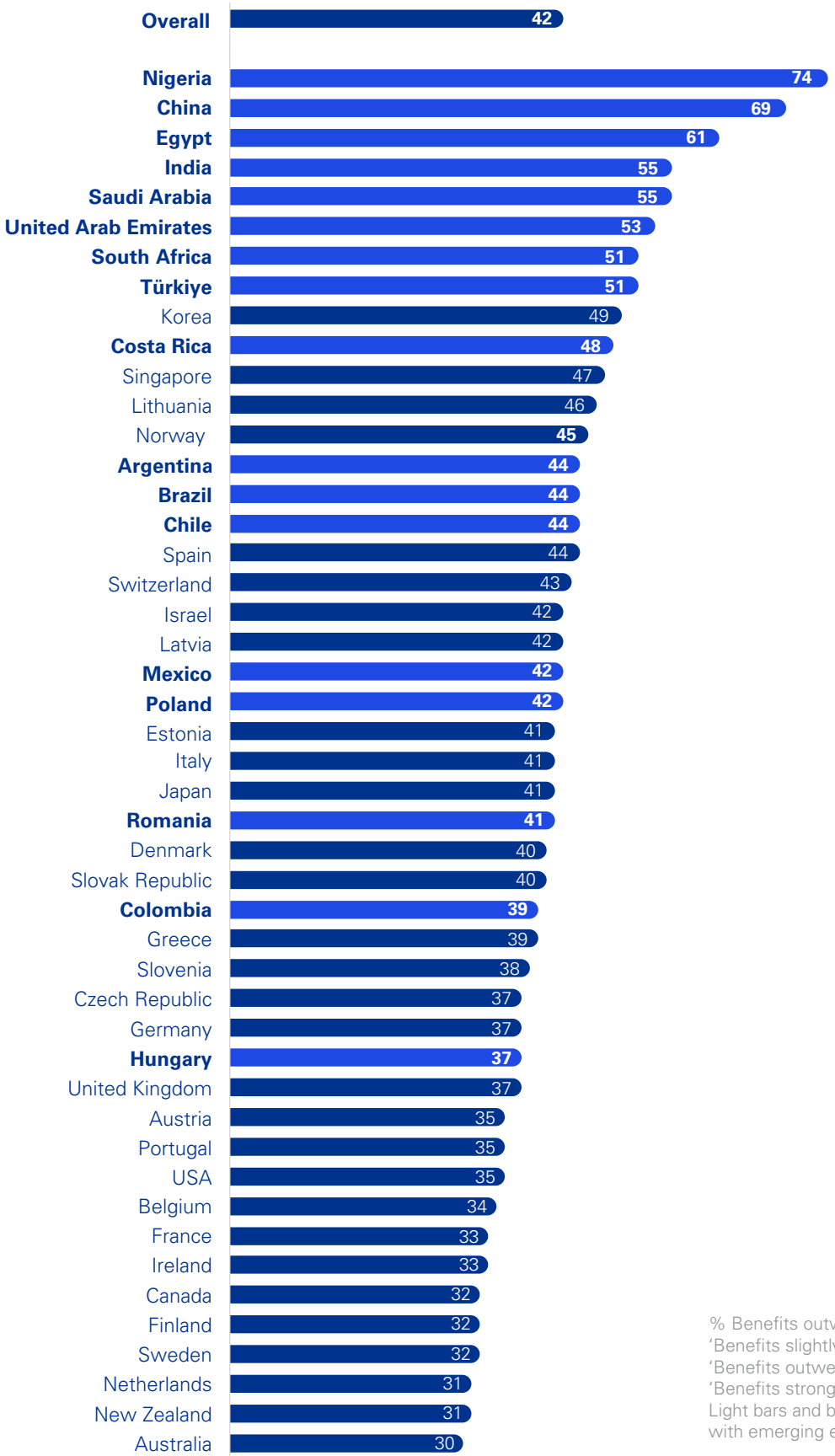
## Figure 22: Experienced negative outcomes from AI use across countries




Based on % Yes. Ordered by 'Cybersecurity risks'. Bolding indicates countries with emerging economies

## Figure 23: Perceptions across countries that AI benefits outweigh risks

'For you personally, how do the benefits of AI [specific application] compare to the risks?'




% Benefits outweigh risks = 'Benefits slightly outweigh the risks', 'Benefits outweigh the risks', and 'Benefits strongly outweigh the risks'. Light bars and bolding indicate countries with emerging economies

# Concern about the risks of AI has increased with fewer believing that the benefits outweigh the risks

The view that the benefits of AI outweigh the risks has decreased from 2022 to 2024 from 50 percent to 41 percent (M=4.4 vs. M=4.1). This reflects a decline in 15 of the 17 countries, with the largest reductions in Brazil and India. For example, in Brazil the belief that the benefits of AI outweigh the risks fell from 71 percent in 2022 to 44 percent in 2024 (M=5.0 vs. M=4.5) and in India it fell from 72 percent to 55 percent (M=5.2 vs. 4.6).

In line with this change and the increase in worry about AI previously report, concern about the risks of AI systems increased in nine countries. The largest increases were in the Netherlands (up from 67% feeling concerned about AI risks in 2022 to 85% in 2024, M=3.1 vs. 3.5) and Germany (65% vs. 79%, M=3.0 vs. 3.4). There was no reduction in the perceived risks from AI systems over time in any country.

In contrast, there was no change in the perceived benefits from AI in most countries, with small increases or decreases in five countries.

## In summary

Taken together, the extensive range of benefits and negative outcomes experienced from AI use highlights the paradoxical impacts of AI systems on individuals and society. For example, depending on how it is implemented and for what purpose, AI systems can either increase fairness or augment bias, facilitate accurate information or contribute to misinformation, enhance what people can do or deskill people.

As with all powerful technologies that augment capabilities and offer transformative opportunities for advancement and growth while also augmenting risks and negative outcomes, AI systems require careful management and governance, together with guardrails and guidance to ensure appropriate and responsible use and prevent harm.

It is with this in mind that we turn next to examine the public's expectations of the regulation and governance of AI.

# What do people expect from the regulation and governance of AI?

Given the risks and benefits associated with AI, we asked people about their expectations of the regulation and governance of AI including whether regulation is necessary, whether current regulation and institutional safeguards are sufficient, and who should regulate AI. We also explored who is trusted to develop and use AI, and the role of governance and assurance mechanisms in supporting trust in AI.

Before presenting findings on public perceptions of AI regulation, it is important to recognize that regulatory approaches vary significantly across jurisdictions. For example, the European Union has adopted the comprehensive EU AI Act, while other jurisdictions are at different stages of maturity—ranging from developing AI-specific frameworks to relying primarily on guidelines or existing regulation. This diversity highlights the absence of a unified global approach and provides important context for interpreting public perceptions of AI regulation.

## The majority in almost all countries surveyed believe AI regulation is required

Given the perceived and experienced risks and impacts of AI, it is not surprising that 70 percent of people across countries globally believe AI regulation is required. Only 17 percent believe that AI regulation is not needed, with the remaining 13 percent unsure. This finding corroborates our prior survey findings, and other independent surveys indicating strong public desire for the regulation of AI.[28]

As shown in Figure 24, the majority of people in all countries view AI regulation as a necessity. India is the exception, where just under half (48%) agree regulation is needed. In all other countries, the percentage reporting that AI regulation is needed ranges between 57 percent in the UAE to 86 percent in Finland.

This broad public consensus of the need to regulate AI supports the many national and international efforts to regulate and govern AI to minimize negative societal outcomes and harm.

## The current regulatory landscape is not meeting public expectations: Only two in five people believe current regulation and laws governing AI are sufficient

The majority (57%) of people disagree or are unsure that current regulation, laws and safeguards are sufficient to make AI use safe and protect people from harm (see Figure 25). Only two in five (43%) believe that regulation and laws governing AI systems are sufficient. This finding aligns with prior surveys[29] indicating people want more effective regulation of AI.

This pattern is strongest in the advanced economies, where only 37 percent view current regulation and laws as adequate. As evidenced in Figure 25, a third or less view regulation as adequate in the advanced economies of New Zealand, Finland, Japan, Sweden, Canada, the USA, Australia, Ireland, France, the UK, and Germany.

In contrast, 55 percent of people in emerging economies view the safeguards around AI as sufficient. This predominantly reflects the six countries where a significant majority believe current safeguards are sufficient, namely India, Nigeria, China, Saudi Arabia, the UAE, and Egypt.

To further understand the adequacy of current regulation and laws, respondents were asked if there is *too much* regulation of AI.

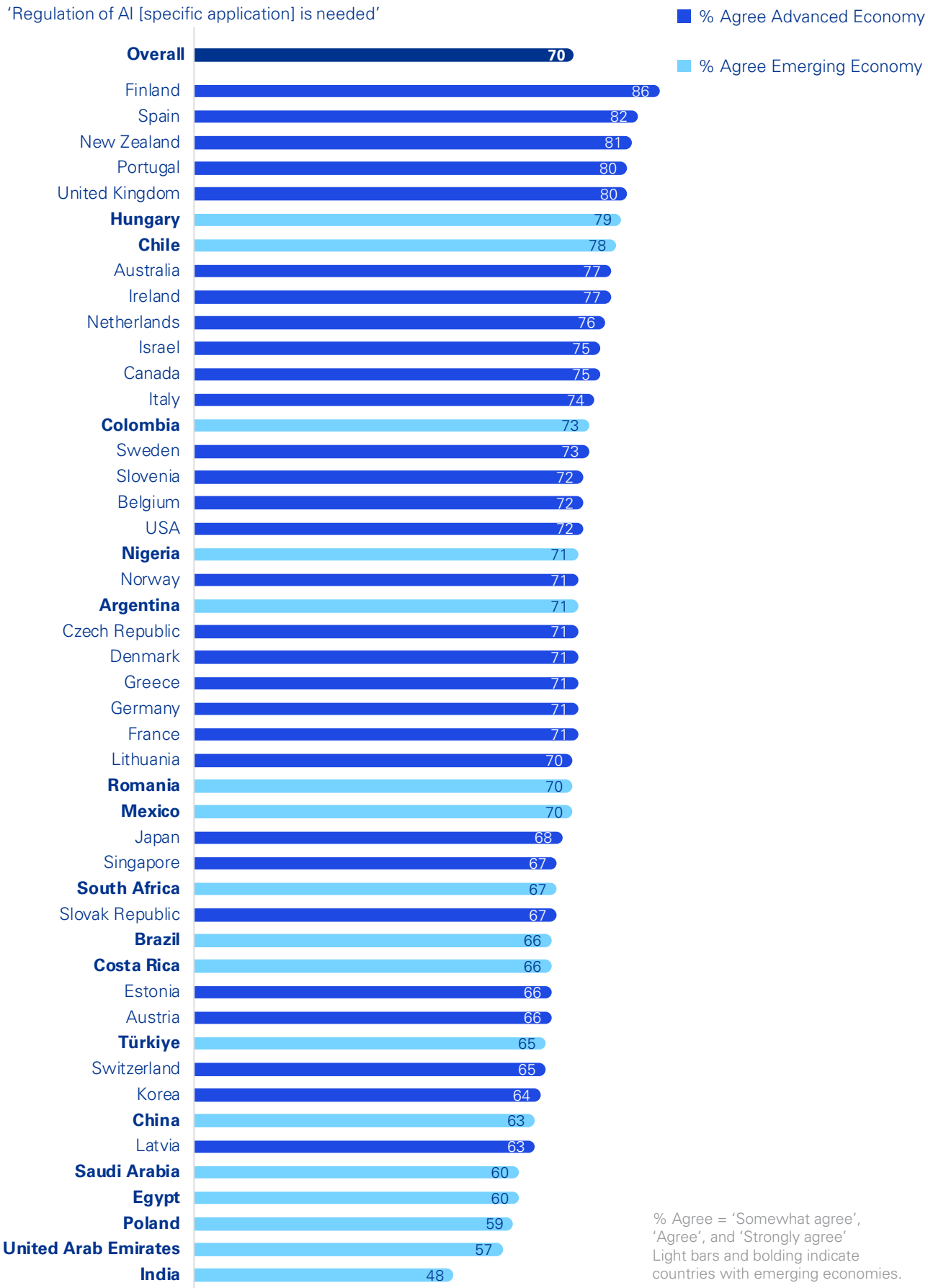
In the advanced economies, the dominant response is to disagree (45%), followed by those who are neutral or don't know (35%). Only one in five (20%) agree that there is already too much regulation of AI. People in the emerging economies, are more evenly split, with about a third (32%) disagreeing that there is too much regulation, another third (30%) neutral or reporting that they don't know, and 38 percent agreeing.

The country-level data shows that the only countries where the majority believe there is too much AI regulation are India, Egypt, Saudi Arabia, and the UAE.

The strong association between perceived adequacy of AI regulation with trust (r=.67), acceptance (r=.64), and use of AI (r=.45), and confidence in organizations to develop and use AI in the public interest (r=.51) highlights the importance of developing an effective regulatory framework to underpin AI adoption.

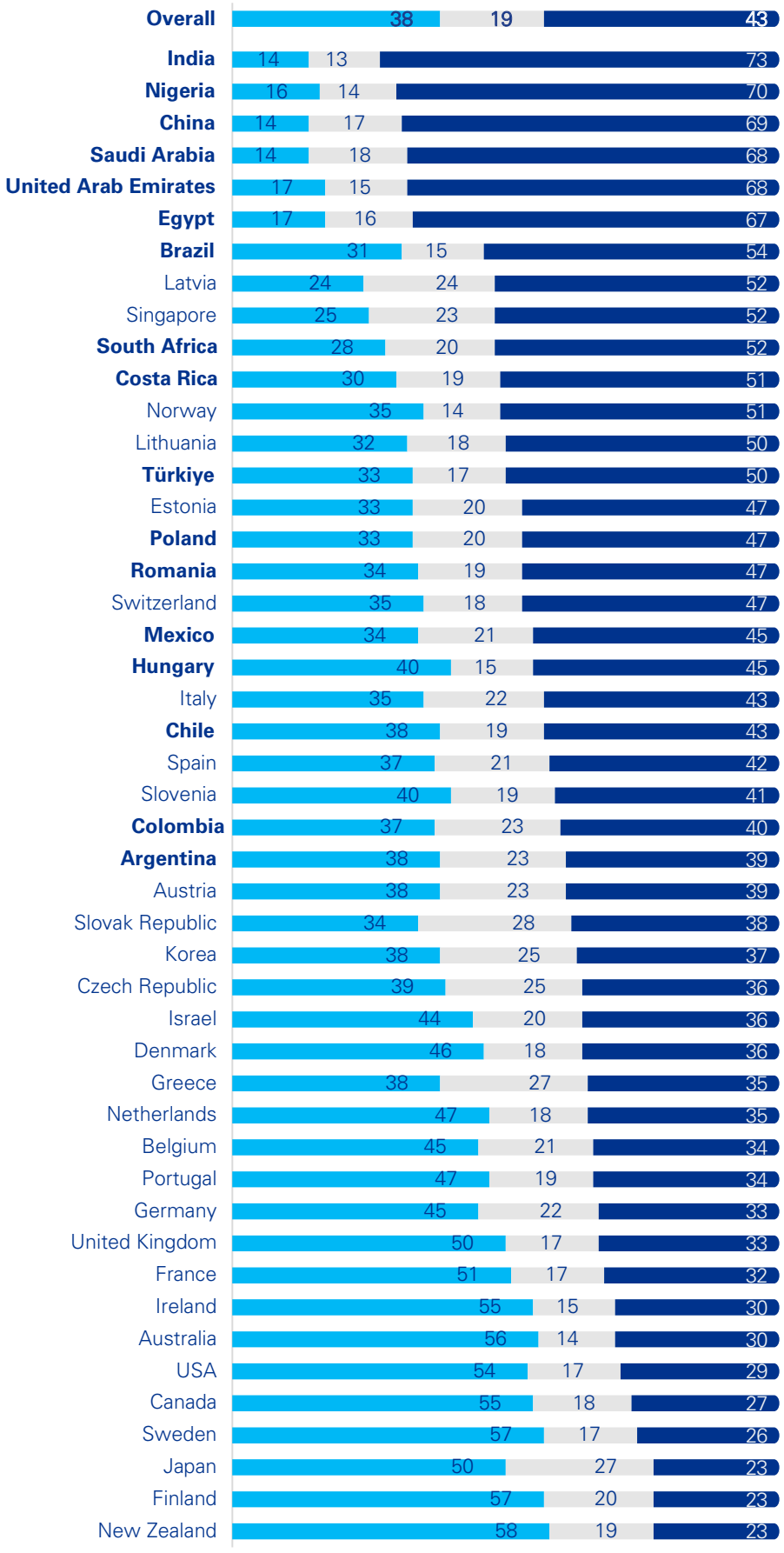
## Figure 24: Need for AI regulation across countries

'Regulation of AI [specific application] is needed'




% Agree = 'Somewhat agree', 'Agree', and 'Strongly agree'
Light bars and bolding indicate countries with emerging economies.

## Figure 25: Perceived adequacy of current regulation and laws to make AI use safe




To what extent do you agree with the following...

There is adequate regulation of AI [specific application]

The current law helps ensure the use of AI (specific application) is safe

There are sufficient governance processes in place to protect against problems from the use of AI (specific application)

There are enough safeguards to make me feel comfortable with the use of AI (specific application)

*Country responses represent amalgamated percentages of all four items*

% Disagree = 'Somewhat disagree', 'Disagree', or 'Strongly disagree'

% Neutral = 'Neutral'

% Agree = 'Somewhat agree', 'Agree', or 'Strongly agree'.

Bolding indicates countries with emerging economies.

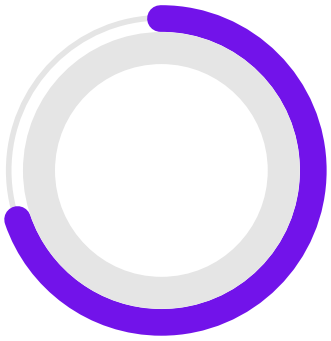
## Most people are not aware of laws, regulation or policy that apply to AI

These views about the adequacy of regulation and laws may reflect, in part, low awareness of the regulatory landscape, given four in five people (83%) are not aware of any laws, regulation or government policy that apply to AI within their respective country.

There is significant variation across countries, ranging from 5 percent awareness of AI regulation in the Czech Republic to 49 percent in China. Awareness is highest in the emerging economies of Nigeria, Costa Rica, Saudi Arabia, Egypt, the UAE, India and China (ranging from 27 percent to 49 percent aware). Amongst the advanced economies, awareness is notably highest in Norway (32%), followed by Estonia, Latvia, Singapore and Switzerland (24% respectively), and under 17 percent in other advanced economies.[30]

**83%**

are not aware of any laws, regulation or policy that apply to AI in their country



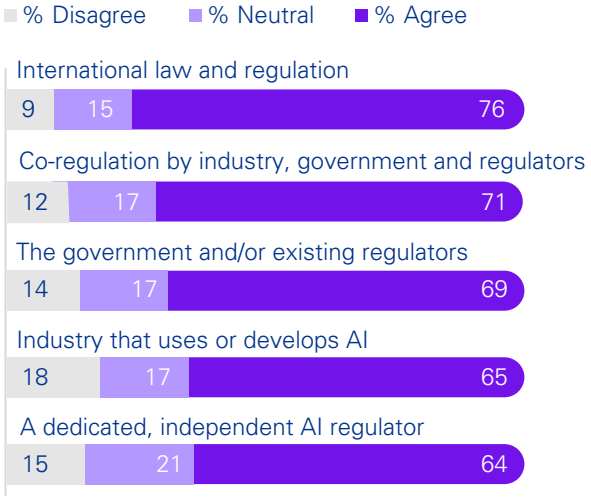
People who have AI training or education, or higher levels of AI literacy (AI knowledge or AI efficacy), report greater awareness of laws and regulations that apply to AI (r=.34-.42). This suggests that one pathway to lift regulatory awareness is through AI literacy programs.

## There is a strong public mandate for international and national regulation of AI

As shown in Figure 26, a clear majority of people (between 64% and 76%) support multiple forms of regulation. Three in four expect international laws and regulation and seven in ten expect co-regulation by industry, government, and existing regulators, and independent oversight from their country's government and existing regulators. Just under two thirds expect governance from industries that use or develop AI systems and a dedicated, independent AI regulator.

### Figure 26: Expectations of who should regulate AI

'I think AI systems [specific application] should be regulated by...'




% Disagree = 'Somewhat disagree', 'Disagree', or 'Strongly disagree'
% Agree = 'Somewhat agree', 'Agree', or 'Strongly agree'

As shown in Figure 27, international laws and regulation was the most endorsed form of regulation in most countries. A clear majority of people in all countries support having international laws and regulation, with agreement ranging from 60% to 86%. This may reflect an appreciation that many AI platforms operate across borders and are often developed and used by multinational organizations headquartered outside of one's own country, requiring laws and regulation at the international level to ensure oversight and application across jurisdictions.

In addition to international laws and regulation, people in most countries express a preference for national government regulation or a co-regulatory approach between government and industry, over self-regulation by industry or an independent AI regulator. However, it is notable that a majority in almost all countries endorse each of these forms of regulation, in line with the broad reach, uptake and impact of AI across multiple sectors and levels of society.

These findings indicate the public has a strong, shared expectation of a multipronged regulatory approach at international and national levels to govern AI, with active involvement from both government and industry.

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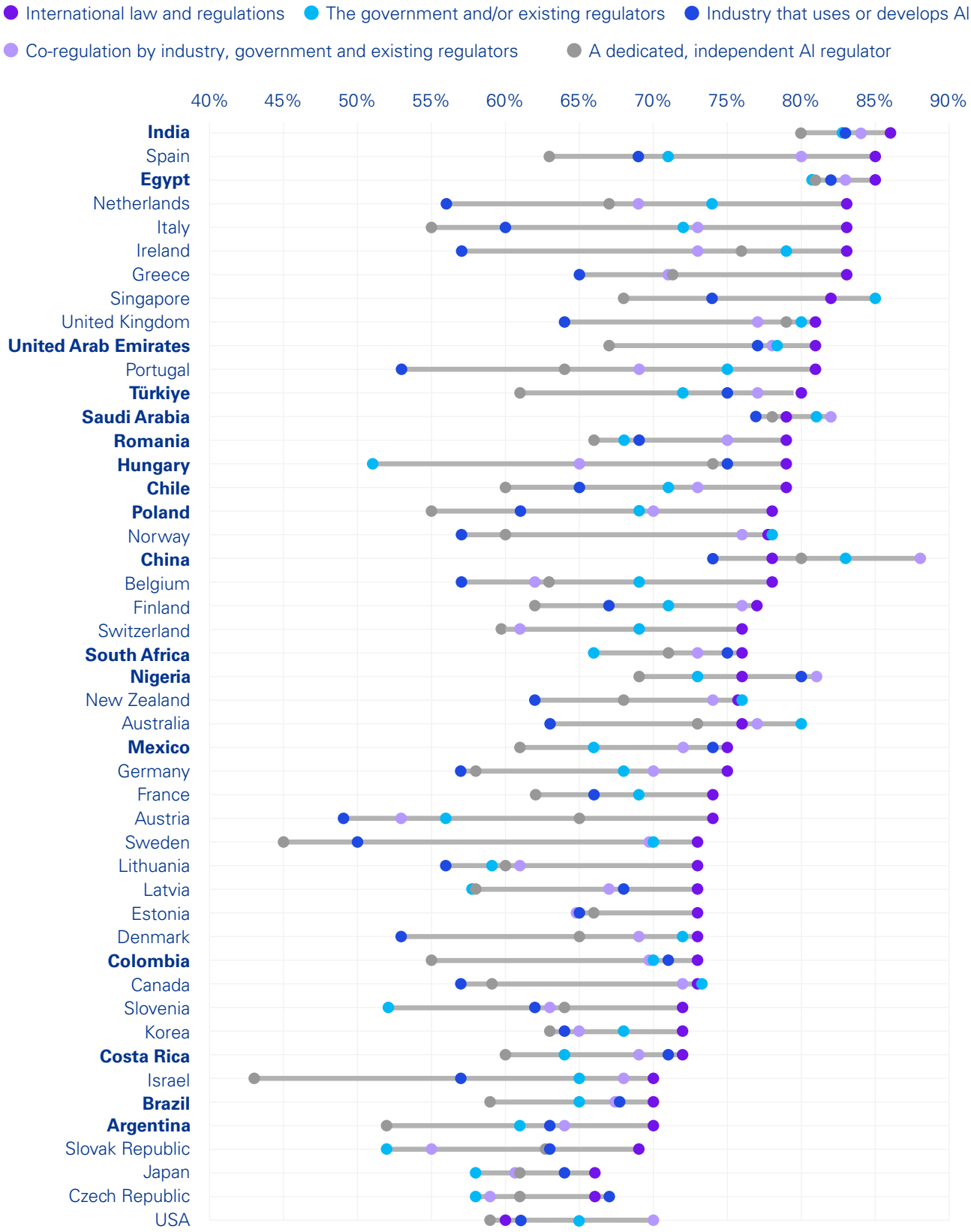
## Figure 27: Expectations of who should regulate AI across countries




Dots represent % Agree = 'Somewhat agree', 'Agree', or 'Strongly agree'.
Ordered by 'International laws and regulation'. Bolding indicates countries with emerging economies.

## A clear public mandate for stronger regulation of AI-generated misinformation

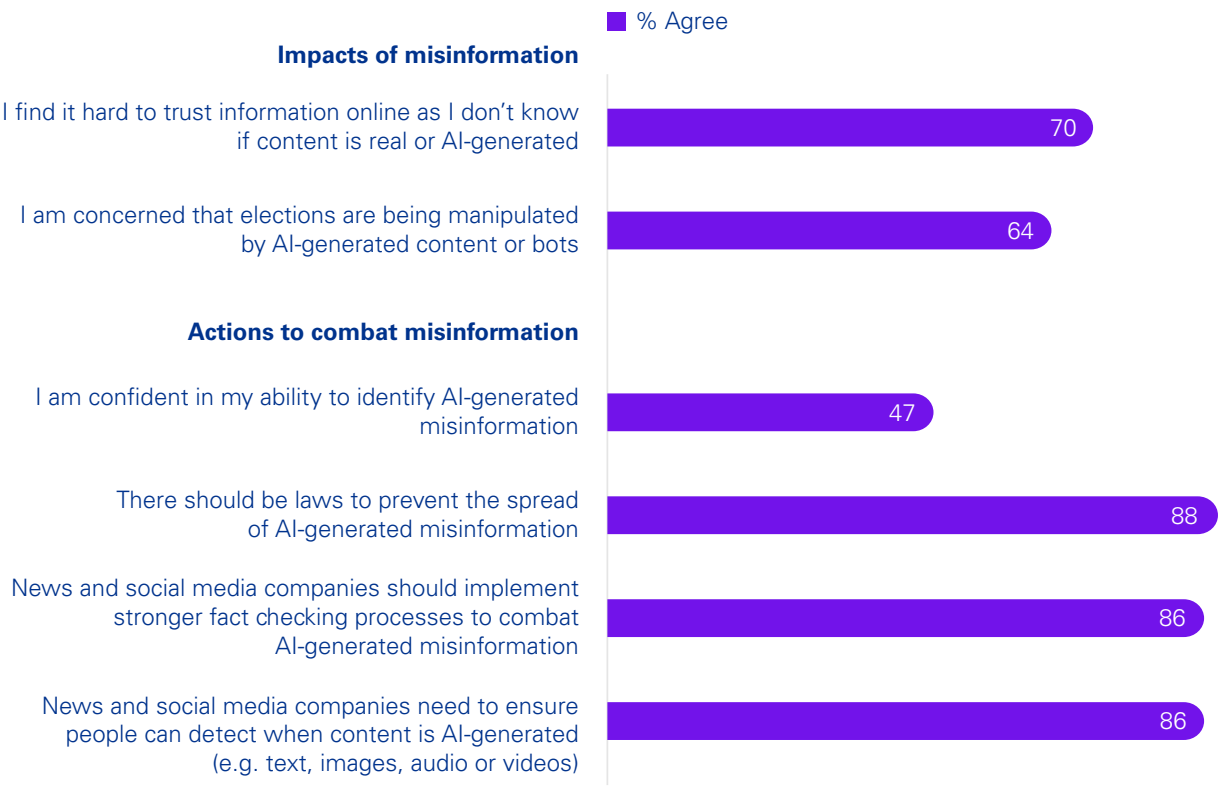
We further examined impacts and expectations related to AI-generated misinformation and disinformation. As shown earlier in the report (see Figure 20), this is a key concern for the majority of people.

Our findings suggest that AI-generated misinformation is eroding trust in online content, with ripple effects for trust in elections. As shown in Figure 28, 70 percent of people are unsure if online content can be trusted because they don't know if content is real or AI-generated, and 64 percent are concerned that elections are being manipulated by AI-powered bots and AI-generated content. This is further exacerbated by the fact that over half of people do not feel they can identify AI-generated misinformation.

Given these concerns, almost nine in ten respondents say they want stronger laws and actions to combat AI-generated misinformation. A large majority agree that there should be laws to prevent the spread of AI-generated misinformation. They want news and social media companies to implement stronger fact-checking processes to combat AI-generated misinformation, and methods (such as watermarking) to allow people to detect when content is AI generated.

### Figure 28: Impacts and management of AI-generated misinformation

'To what extent do you agree with the following?'




% Agree = 'Somewhat agree', Agree', and 'Strongly agree'

## Organizational assurance mechanisms enhance trust in AI systems

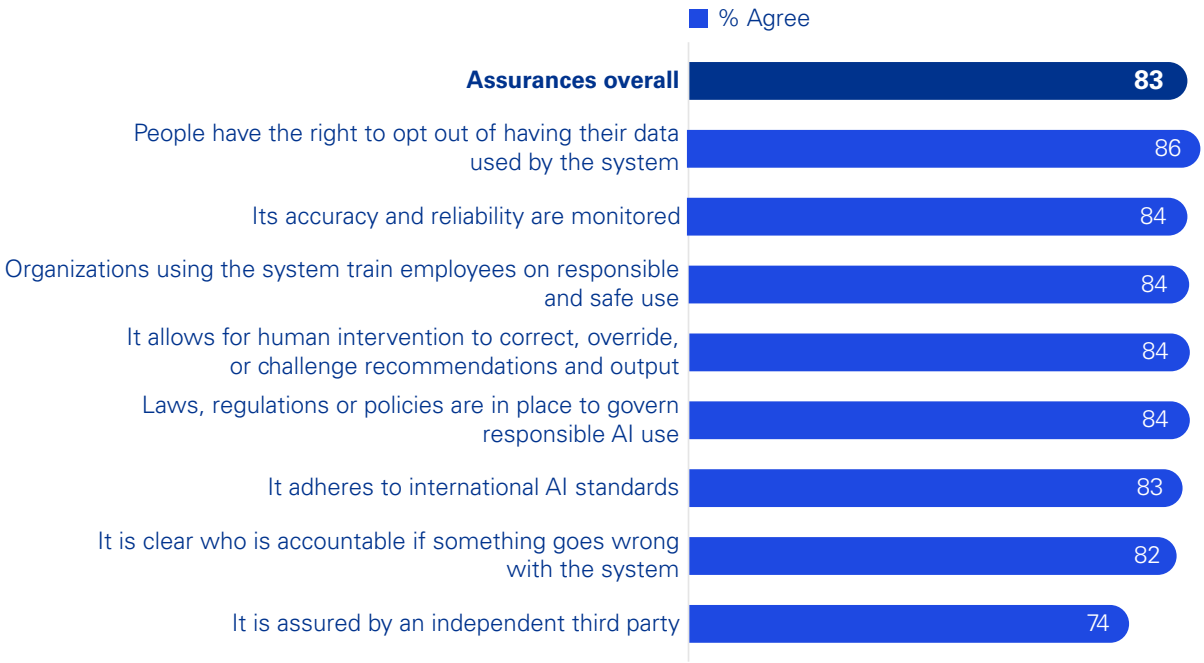
In addition to external rules, laws, and safeguards, we asked about a range of assurance mechanisms available to organizations to support and signal their trustworthy and responsible use of AI. These mechanisms range from monitoring system reliability to human oversight and accountability, responsible AI policies and training, adhering to international AI standards, and independent third-party AI assurance systems (see Figure 29).

Four out of five (83%) report they would be more willing to trust an AI system when such assurance mechanisms are in place.

Each of these assurance mechanisms is viewed as important for trust across all countries (ranging from 69% in Japan to 89% in Türkiye and Nigeria). This indicates that these mechanisms can play a key role in strengthening trust in organizational AI use across diverse markets.

### Figure 29: AI assurance mechanisms

'I would be more willing to trust an AI system (specific application) if…'




% Agree = 'Somewhat agree', Agree', and 'Strongly agree'

**There has been no change in the perceived adequacy of AI safeguards over time, however the importance of organizational assurance mechanisms for trust has increased**

The belief that AI regulation is needed has remained constant over time (71% in 2022 vs 71% in 2024; M=2.5 vs. 2.6), as has the perceived adequacy of current regulations and laws (M=4.0 at both time points). However, there is a trend towards fewer people viewing current AI regulations as adequate in nine countries, largest reduction evident in Germany (41% agree in 2022 vs. 31% in 2024).

Given the increase in perceived risks of AI previously reported, it is not surprising that the importance of organizational assurance mechanisms has increased over time. Eighty percent of people in 2024 reported they would be more likely to trust AI systems when organizational assurance mechanisms are in place, compared to 72 percent in 2022 (M=5.6 vs. M=5.0). There were significant increases in all 17 countries, with the largest in Canada, the UK and Finland (ranging from 69-74% in 2022 to 81-84% in 2024).

## People have most confidence in universities and healthcare organizations to develop and use AI

As shown in Figure 30, people have the most confidence in their country's universities, research institutions, and healthcare organizations to develop and use AI in the best interests of the public. Between 78 percent and 88 percent report moderate to high confidence in these entities in advanced and emerging economies, respectively.

People are less confident in their government's use of AI. Between 58 percent and 65 percent report moderate to high confidence in their national government to develop and use AI in the best interests of the public in advanced and emerging economies, respectively. However, two in five (40%) report low confidence. Addressing this low confidence in governmental use of AI will be important going forward to realize the many beneficial applications of AI use in public sector service delivery, including enabling equitable access to government services and enhancing the personalization, effectiveness and efficiency of service delivery.

There is significant variation across countries in people's confidence in government. Half or more (50 to 67%) lack confidence in their government to develop and use AI in the public's best interest in Argentina, Italy, Spain, Ireland, Japan, the USA, Colombia, Hungary, Slovenia, Romania, Greece, the Czech Republic and Slovakia. In contrast, as shown in Figure 31, most people in Norway, Singapore, India, the UAE, Saudi Arabia and China have confidence in their government (ranging between 65% and 90%).

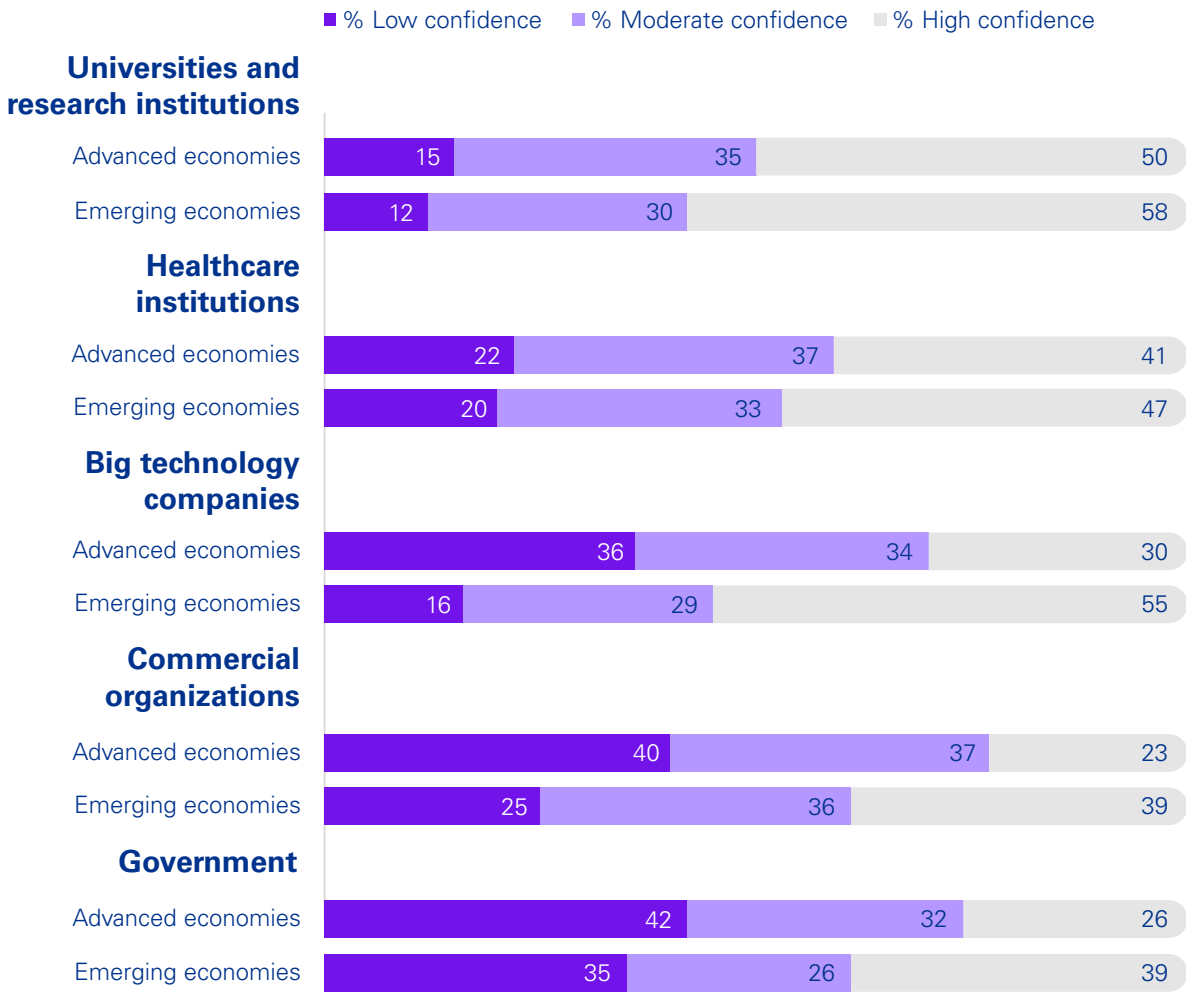
People in emerging economies report greater confidence in big technology companies, like Apple, Facebook/Meta, Google/Alphabet, Huawei, OpenAI and Tencent (84% vs 64% confident) and commercial organizations, such as retailers and banks (75% vs 60%), than those in advanced economies. For example, as shown in Figure 31, over 90 percent of people in China, Nigeria, India, Egypt, and Saudi Arabia have moderate to high confidence in big technology firms. In comparison, countries with advanced economies tend to have lower confidence in big technology firms, such as France, the UK, Sweden, the USA, Denmark, Canada, Australia and New Zealand (ranging from 60% in France to 46% in New Zealand).

This highlights the potential opportunity for commercial organizations, big technology firms, and government to collaborate with universities and research institutions in the development of AI.

When people are confident in entities to develop and use AI, they are more likely to trust (r=.54) and accept AI systems (r=.52), accept AI systems (r=.52), and use AI (r=.40).

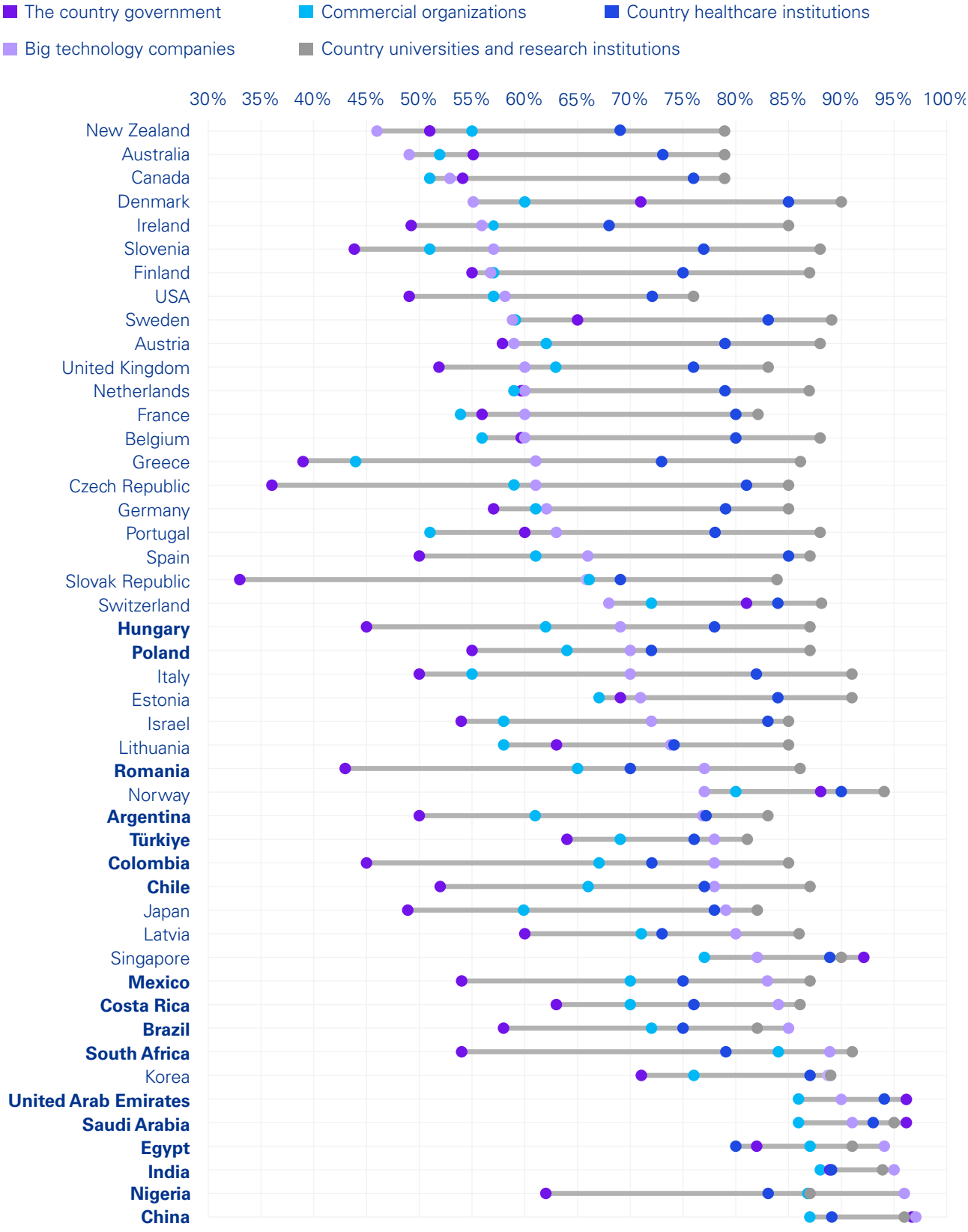
## Figure 30: Confidence in entities to develop and use AI

'How much confidence do you have in the following entities to develop and use AI in the best interests of the public?'




% Low confidence = 'Very low confidence' and 'Low confidence'
% High confidence = 'High confidence' and 'Very high confidence'

## Figure 31: Confidence in entities to develop and use AI across countries




% based on 'Moderate confidence', 'High confidence' and 'Very high confidence' (5 point scale)
Ordered by Big technology companies. Bolding indicates countries with emerging economies.

## In summary

Taken together, these findings reveal a clear public desire for stronger regulation and governance of AI systems that is fit-for-purpose in supporting safe and trustworthy use. The majority expect robust international and national regulation, but many do not believe that the current safeguards around AI are sufficient. There is also widespread support for stronger legislation and action that specifically targets AI-generated misinformation.

The low level of public awareness of laws governing AI likely reflects that many jurisdictions are still in an early phase of designing and implementing regulatory frameworks. However, it also suggests a need to support people to understand if and how existing and emerging laws and regulation apply to AI.

At the organizational level, the findings highlight that organizations can strengthen trust in their use of AI systems by putting in place governance and assurance mechanisms that signal trustworthy and responsible use. In the next section we further examine key pathways for supporting trust and acceptance of AI systems.

# What are the key drivers of trust and acceptance of AI systems?

In the preceding sections, we identified that AI literacy and training, perceptions of the benefits and risks of AI, and the perceived adequacy of AI regulation and confidence in entities to use AI, are each associated with people's trust and acceptance of AI systems used in society. To identify the most important predictors, we used a statistical technique called structural equation modeling.[31]

The model examines four distinct pathways—reflecting knowledge, motivational, uncertainty, and institutional drivers—testing and comparing their importance in predicting trust and acceptance of AI. We show the model in Figure 32, together with notes on interpretation.

## Trust is central to AI acceptance

The model shows that trust is a key driver of AI acceptance (B=.43[32]), empirically supporting why trust in AI matters: if people are willing to trust AI systems, then they are more likely to accept and approve their use in society.

As explained below, the model further shows that trust acts as a central mechanism through which other drivers impact AI acceptance.

## AI literacy influences trust and acceptance

The knowledge pathway is based on evidence that knowledge, efficacy, and training—which each relate to AI literacy—help to enhance trust in technology.[33]

The model shows that people are more likely to trust AI systems when they believe they understand AI and when and how it is used in common applications and have received AI education or training (B=.11). The knowledge pathway also has a direct impact on acceptance (B=.12).

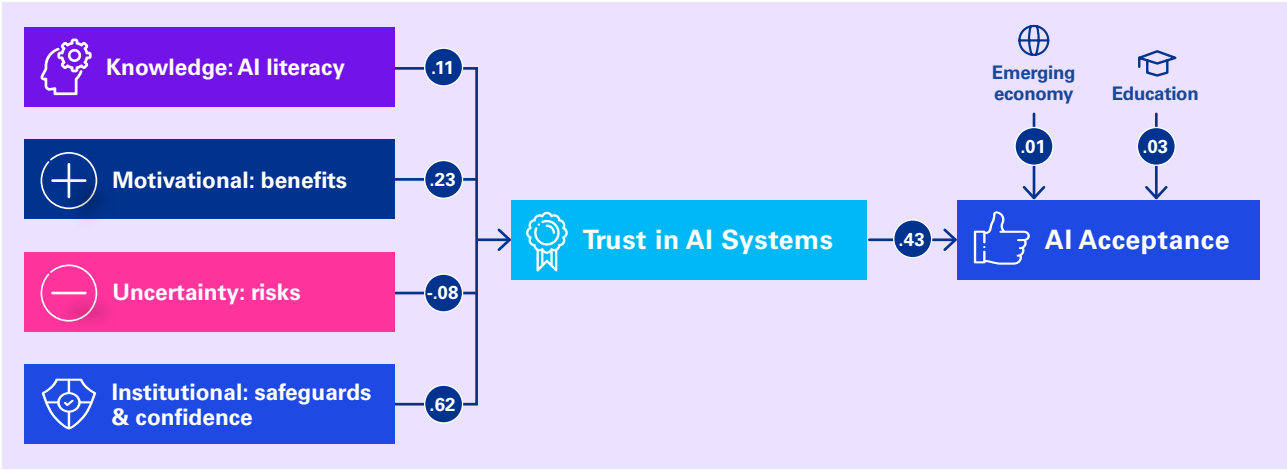
These relationships indicate the importance of providing people with opportunities to enhance their AI literacy.

## The perceived benefits of AI foster increased trust and acceptance

The motivational pathway to trust is grounded in evidence that the more people perceive benefits, utility, and positive outcomes from the use of technologies, the more they will be motivated to trust and accept them.[34]

Expecting AI systems to produce benefits (B=.23) has a relatively strong influence on trust, as well as on levels of acceptance (B=.22). This relationship highlights the importance of designing and using AI systems in a way that delivers benefits to a broad range of people.

## Figure 32: A model of the key drivers of trust and acceptance of AI use in society




**Knowledge** drivers include indicators of AI literacy:

- **AI knowledge:** the extent to which people feel they understand AI and when and where it is used, including objective knowledge of AI use in common technologies
- **AI efficacy:** people's self-assessed ability to use AI tools responsibly and effectively
- **AI training:** having completed a university course related to AI or received some form of AI training

**Motivational** drivers include the **expected benefits** of AI: the extent to which people expect a range of benefits to arise from the use of AI systems

**Uncertainty** drivers include **perceived risks** of AI: the extent to which people are concerned about a range of risks related to the use of AI systems

**Institutional** drivers include:

- Safeguards: the belief that current laws, rules and governance are sufficient to ensure AI use is safe
- Confidence in entities to develop and use AI in the best interests of the public

The extent to which people trust AI systems and perceive them to be trustworthy

The extent to which people accept and approve of AI systems

Some demographics have a small impact on acceptance:

- People in emerging economies are more accepting
- People with university education are more accepting

Predictors also have a direct effect on acceptance after accounting for their influence via trust:

- Knowledge: .12
- Motivational: .22
- Uncertainty: -.05
- Institutional: .17

### How to read the model

When reading the model, follow the arrows from left to right. The left boxes show the four drivers of trust and acceptance, with notes explaining each driver in the boxes below the model. The values on the arrows indicate the relative importance of each driver in influencing trust and acceptance: the larger the number, the stronger the effect. The positive values for institutional safeguards and confidence, benefits, and knowledge, indicate that when these drivers increase, so do trust and acceptance. The negative value for uncertainty indicates that when perceived risks increase, trust and acceptance decrease.

The model is based on all data (across countries and AI applications). All relationships shown are significant ($p<.001$).

## The perceived risks of AI create uncertainty and reduce trust and acceptance

The uncertainty pathway is based on the view that it is more difficult to trust technologies in contexts of risk or when the outcomes and impacts of the technologies are uncertain.[35]

The model shows that the more concerned people are about the risks and potential negative outcomes of AI use in society, the less likely they are to trust the systems (B=-.08) or accept them (B=-.05). The impact of risk concern is notably smaller than that of benefit expectation, which helps to explain why people are willing to trust and accept AI systems in society and use them personally to gain benefits, despite concerns they may have about the risks.

This finding demonstrates the importance of proactively working to mitigate the perceived risks associated with AI systems at multiple levels and to effectively communicate the mitigation strategies that are in place to help reduce uncertainty, reassure people and support their trust in AI.

## Institutional factors are the strongest drivers of trust, and also impact acceptance

The institutional pathway reflects evidence that institutional safeguards and control mechanisms (e.g. laws, rules, standards) and confidence in the institutions deploying technologies reassure people of the safety, reliability and trustworthiness of technologies.[36]

Our findings indicate that people are more trusting of AI systems when they believe current regulation and laws are sufficient to make AI adoption and integration into society safe and are confident in a range of entities—from government, big tech companies, commercial organizations, research institutions, and health organizations—to develop and use AI in the public's best interests (B=.62). The influence of institutional factors on acceptance is comparatively smaller (B=.17), suggesting that much of the influence of these factors on acceptance occurs via trust.

The model shows the institutional pathway is the most important pathway to trust. However, the broader survey results indicate that (a) many are not convinced that current laws and regulation are sufficient, and (b) perceptions of the adequacy of AI regulation have not shifted markedly over time. This stable perception of existing regulation highlights an ongoing challenge for policymakers when it comes to reassuring the public that there are appropriate laws, regulation and safeguards in place.

The model's predictors explain 79 percent of the variance in trust and 72 percent of the variance in acceptance. The similarity of these findings to the model that was tested and validated in our prior research report[37] reinforces the importance of these drivers and the robustness of the model when tested in a larger, more diverse sample.

### In summary

In summary, the modeling indicates that each of the four pathways play a significant and complementary role in supporting trust and acceptance of AI use in society.

# How do demographic factors influence trust, attitudes and use of AI?

To understand how attitudes and experiences with AI systems vary across demographic groups, we examined the influence of age, income, education, AI training, and gender on trust, acceptance, and the key drivers in our model.

The analyses reveal that AI training and income consistently have the strongest effects. It is notable that there are no differences between men and women on any of the key indicators.

### Younger people, higher income earners, the university-educated, and those with AI training are more trusting and accepting of AI systems, have higher levels of AI literacy, and are more likely to use AI

Analyses reveal that four subgroups are more trusting and accepting of AI, more likely to have higher levels of AI knowledge and efficacy, and more likely to use AI. As shown in Figures 33-35, this applies to:

- People with AI-related training or education (vs. those without)
- People with high household incomes (vs. middle- and low-income categories)
- Younger people, notably those aged 18-34 years, compared to the oldest category of respondents (55+)
- People with a university education (vs. no university education)

As shown in Figure 33, those with AI-related education or training are almost twice as likely to trust and accept AI technologies compared to those without. Similarly, high-income earners are twice as likely to trust AI and three times more likely to have high acceptance of AI compared to those with lower incomes.

Over

**80%**

of people under 35, people with AI training, and those with high incomes use AI tools, compared to less than

**50%**

of those 55 years of age and older, those who do not have AI training, and people with low incomes.

In relation to the use of AI tools, over 80 percent of people under 35, people with AI training, and those with high incomes use AI tools on a regular basis, compared to less than 50 percent of those 55 years of age and older, those who do not have AI training, and people with low incomes (see Figure 34).

These findings likely reflect that younger people, those with higher incomes, and the university-educated are more likely to have completed AI training or AI-related education and have higher levels of AI knowledge and efficacy (see Figure 35). For instance, 71 percent of young adults report moderate to high levels of AI knowledge, compared to 33 percent of older adults. 80 percent of high-income earners feel confident about using AI, compared to 44 percent of low-income respondents. Strikingly, 70 percent of those with high income report having AI education or training, compared to 38 percent of middle-income earners and just 18 percent of those who report low income. Over 9 in 10 (92%) of high-income earners are interested in learning more about AI, compared to just 42 percent of low-income earners.

## People with AI training and high-income earners report more benefits from AI

Individuals with AI training and high-income earners are more likely to expect a range of benefits from AI compared to low-income earners and those with no AI training or education (High income: 90%, vs. middle: 83%, vs. low: 74%; AI education or training: 89%, no AI education or training: 79%) and report experiencing more positive outcomes (High income: 80%, middle income: 72%, low income: 60%; AI training or education: 79%, no AI education or training: 63%). Higher AI literacy and use, together with greater access to resources, may uniquely position these groups to seize the benefits of AI use, and protect them from negative outcomes.

Regarding the experience of specific benefits, 80 percent of people who report high income have experienced enhanced decision-making, compared to 70 percent of middle-income earners and just 59 percent of those with low income. Those with AI education or training are particularly more likely to have experienced reduced costs or better use of resources (75% vs. 53%), enhanced creativity (76% vs. 54%), and enhancing what people can do (80% vs. 65%). Concerns about negative AI outcomes and experiences of such outcomes are consistent across all subgroups.

## Those with AI training, high-income earners and younger people are more likely to view AI regulation and laws as sufficient

People with AI training, high-income earners and younger people are less likely to believe AI regulation is necessary. Only 54 percent of high-income respondents agree that AI regulation is required, compared to between 72 percent and 75 percent of middle- and low-income respondents. Similarly, 61 percent of the youngest age group believe that AI regulation is required, compared to 70 percent in the middle-age range (35-44 years) and 79 percent in older age categories (55+ years).

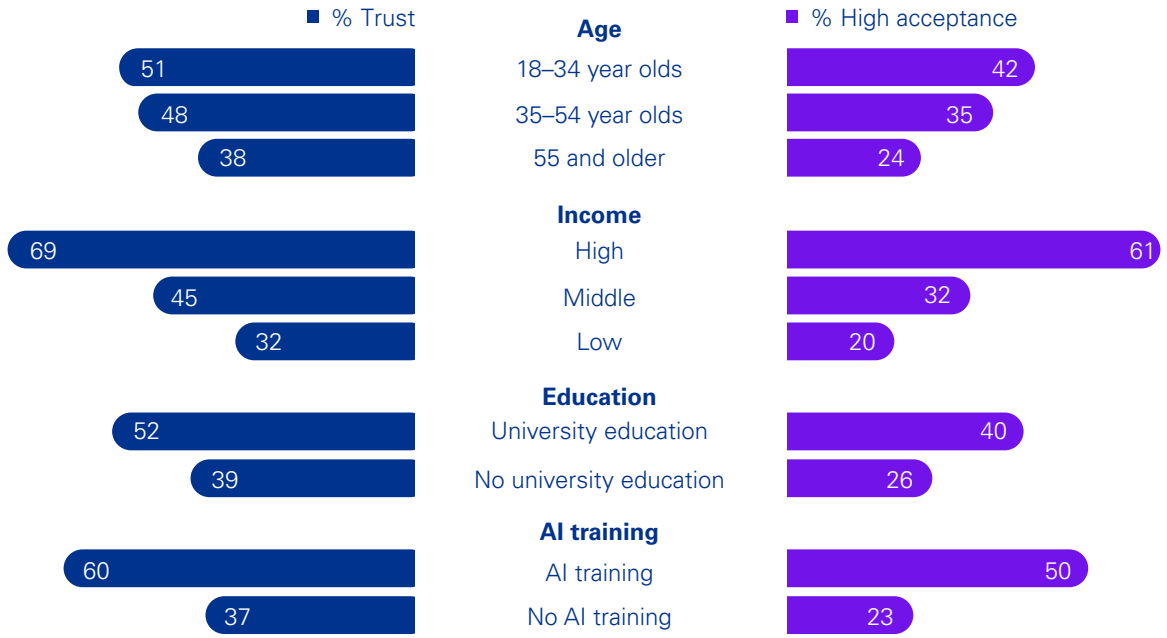
These groups are also more likely to view existing AI regulation as sufficient, with 69 percent of high-income earners agreeing, compared to just 28 percent of low-income earners.

Over

**9 in 10**

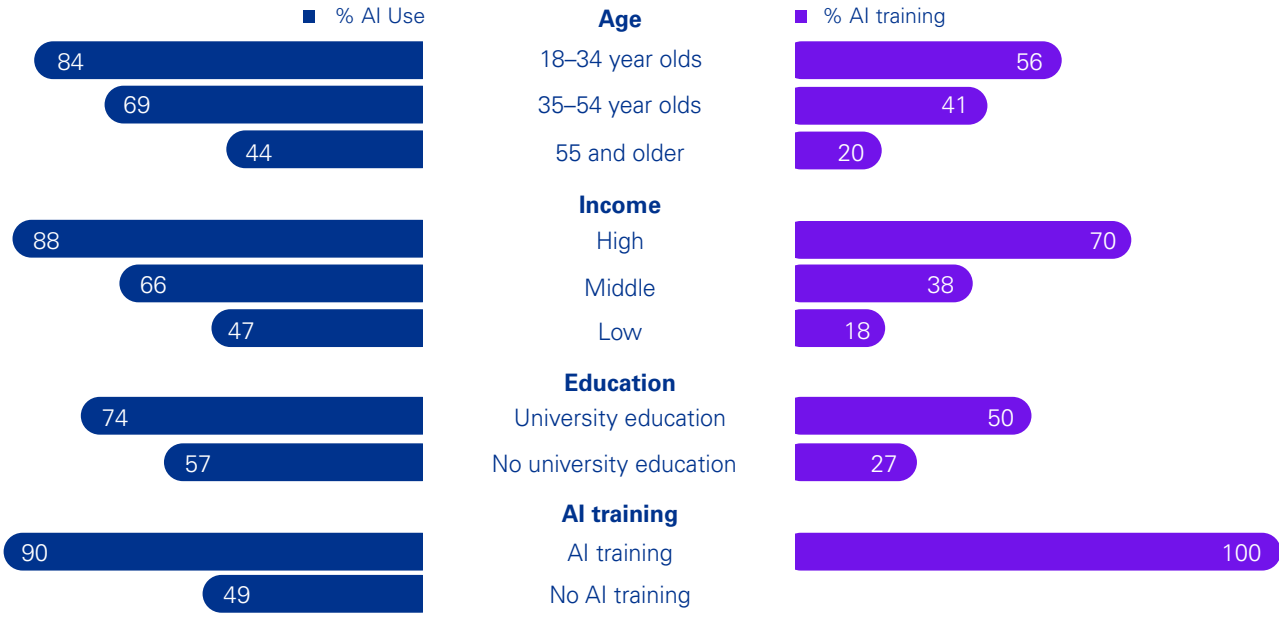
high-income earners are interested in learning more about AI, compared to just 42 percent of low-income earners.

## Figure 33: Trust and acceptance of AI systems by age, income, education, and AI training



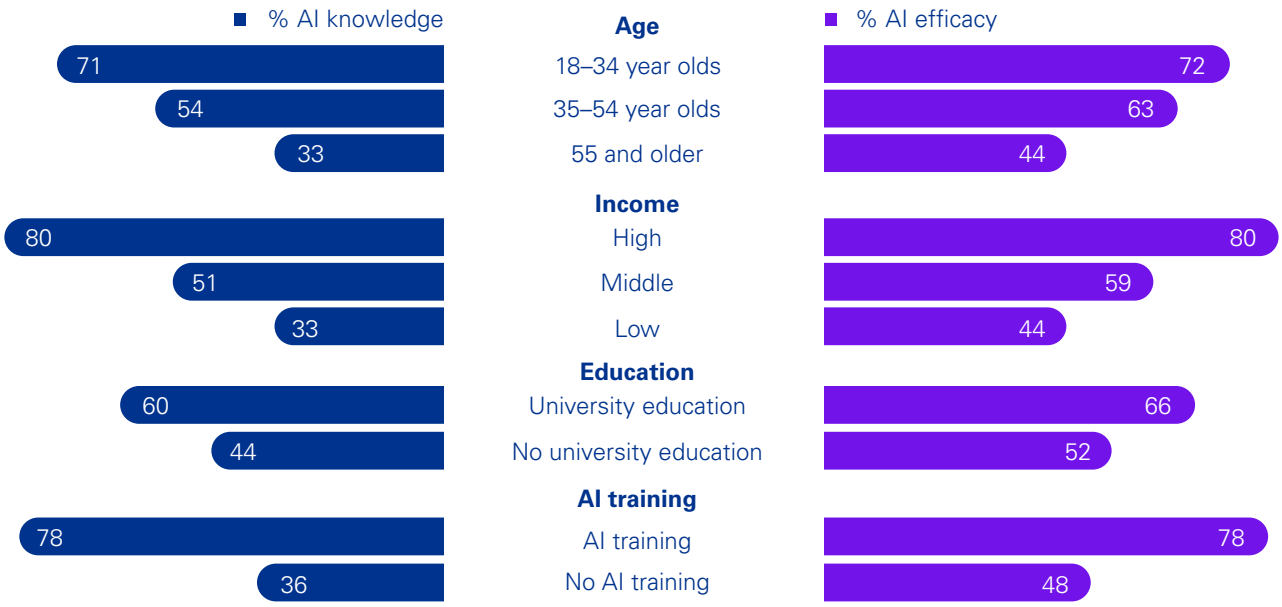

% Trust in AI= 'Somewhat willing', 'Mostly willing', 'Completely willing'
% High acceptance = 'Highly' or 'Completely' accept

## Figure 34: Use of AI and AI training by age, income, and education




% AI use = 'Occasionally (every few months)' to 'Always (multiple times a day)'
% AI training = '% Selected University level course in AI', '% Selected Work-based training', or '% Selected Formal or informal training outside work'

## Figure 35: AI knowledge and AI efficacy by age, income, and education




% AI knowledge= 'To a moderate extent', 'To a large extent', 'To a very large extent'
% AI efficacy = 'Somewhat agree', 'Agree', 'Strongly agree'

### In summary

Taken together, the pattern of findings suggests that people who are younger and university educated, and particularly those with AI training and higher incomes, are better positioned to use and realize the benefits from AI. This is likely due to their higher levels of AI literacy and resources.

In the next two sections, we examine how employees and students use, experience and trust AI in their work and education, and their perceptions of how their organizations govern and support AI adoption and responsible use. These sections are based on the subset of survey respondents who identified as working or studying, respectively.

SECTION TWO

# Employee attitudes towards AI at work

To complement insights in prior sections, respondents who were working full or part-time[38] were asked about their use of AI for work purposes and by their organization, including how they use AI, the impact of AI use on work and jobs, their trust in AI for work purposes, and organizational support for responsible AI.

Specifically, employees were asked to report how often they *intentionally* use AI tools and systems in their work, clarifying that this use is different from the passive use of AI (such as when AI operates behind the scenes in tools such as email filters and search engines).

# How is AI being used by employees at work?

## The age of working with AI is here: 3 in 5 employees report intentional regular use of AI at work

The rapid adoption of AI in the workplace, augmented by the release of generative AI tools such as ChatGPT, is evident.

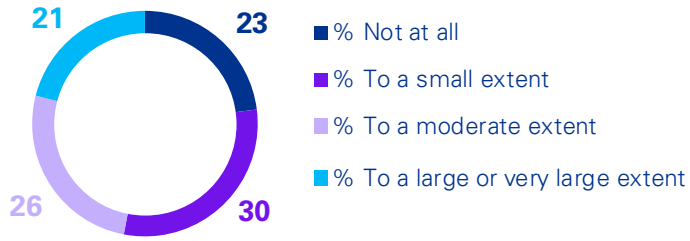
As shown in Figure 36, 77 percent of employees report that AI is being used by their organization. Almost half (47%) report their organization uses AI to a moderate to very large extent across a range of areas and tasks, and thirty percent report limited use in isolated areas or specific tasks. Just under one-quarter of employees report their organization does not use AI.

Fifty-eight percent of employees report intentionally using AI tools and systems in their work on a regular basis. Less than half of employees report any form of training or education in AI or related fields (47%) or have at least a moderate level of AI knowledge (46%), and only half (51%) believe they can use AI effectively.

Figure 37 shows that frequency of use varies; about a third (31%) use AI on a weekly or daily basis, about a quarter (27%) use it semi-regularly (i.e. every month or few months) and two in five (42%) rarely or never use it.

### Figure 36: Organizational use of AI (employee reported)

'To what extent is AI used in the organization you work for?'



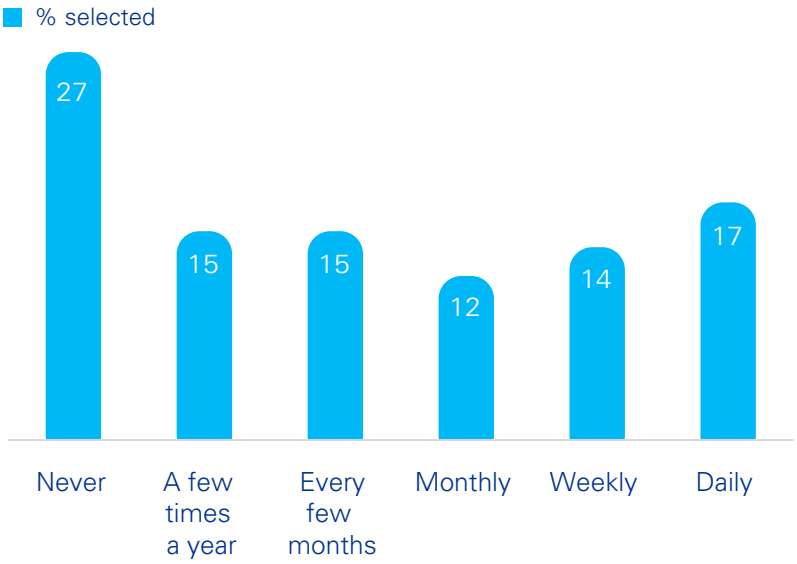

% Not at all = 'Not at all'
% To a small extent = 'To a small extent'
% To a moderate extent = 'To a moderate extent'
% 'To a large or very large extent = 'To a large extent', 'To a very large extent'

**58%**

of employees report intentionally using AI tools in their work on a regular basis.

## Figure 37: Frequency of intentional use of AI at work

'In your work, how often do you intentionally use AI tools, including generative AI tools?'




Daily = 'most days' or 'multiple times a day'

The one-quarter (27%) of employees who never intentionally use AI at work were asked to indicate the reasons why. The top reasons included[39]:

- AI tools are not helpful, required or used for their work (58%)
- A preference to work without the involvement of AI tools (19%)
- Not understanding how to use AI tools (14%)
- AI tools are not approved or allowed (14%)
- Not trusting AI tools (12%)
- Lack of access or not wanting to pay for AI tools (12%)

In several advanced economies—notably the USA, Australia, Switzerland, Sweden, New Zealand, and the Netherlands—a lack of trust in AI tools was one of the top three reasons for not using AI (reported by 15-20%). Compared to those in emerging economies, employees working in advanced economies are more likely to say that they did not use AI tools because they are not helpful or required for their work.

These findings provide insight into the potential barriers of AI adoption at work, reinforcing the importance of supporting AI literacy amongst employees, providing access to AI tools, and facilitating understanding of how AI can be used for a range of work applications to create value. It also highlights the importance of respecting employees' choice about the use of these tools in their work.

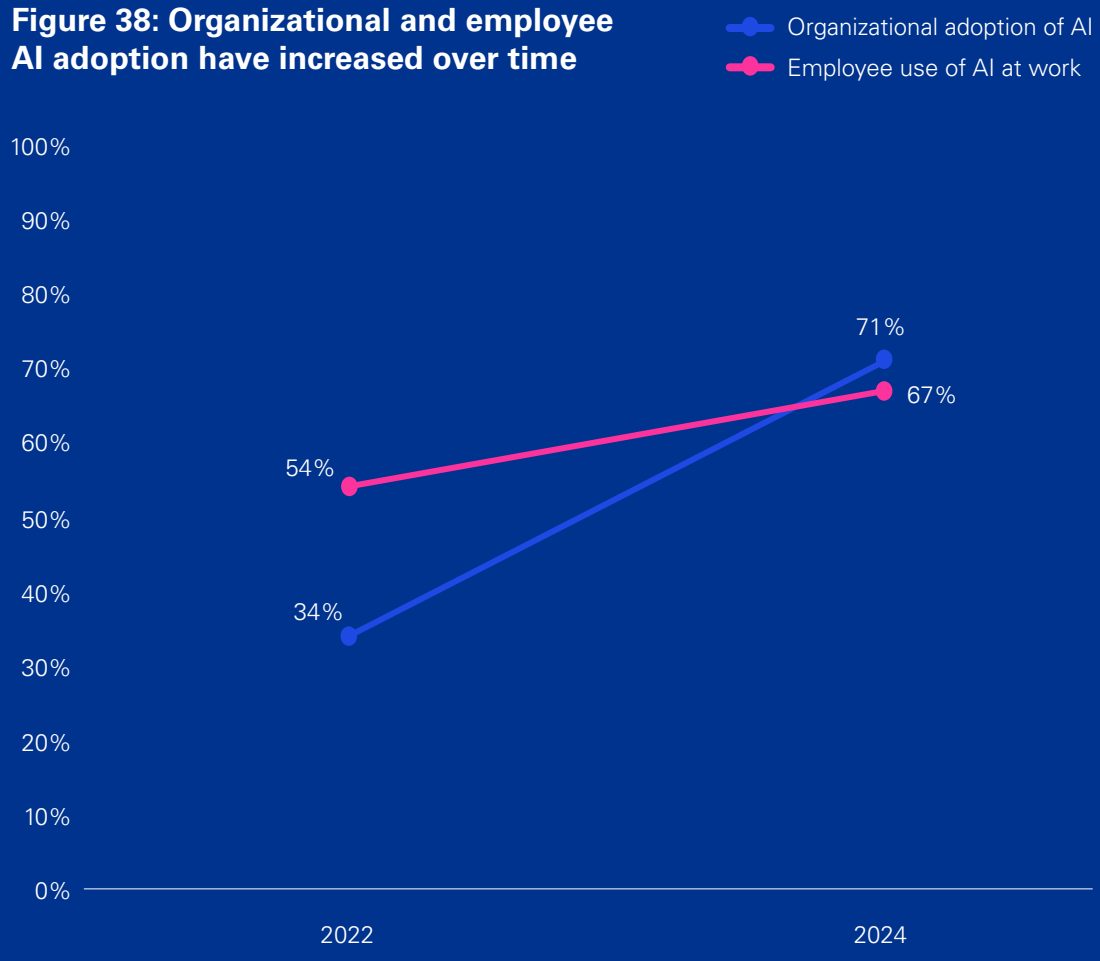
# Adoption of AI at work has increased dramatically since the release of ChatGPT

In the 17 countries surveyed in 2022 and 2024, the proportion of employees reporting intentional use of AI for work purposes increased from just over half (54%) in 2022 to two thirds (67%) in 2024 (see Figure 38). These figures reflect any use of AI for work purposes, including rare and occasional use.

Employee use of AI increased in all countries, with the largest increases occurring in the USA, Canada, the UK, and Australia (ranging from 34-37% in 2022 to 58-66% in 2024).

Similarly, the number of employees reporting organizational use of AI increased from 34 percent in 2022 to 71 percent in 2024, with significant increases in all 17 countries. The largest increases were again in the USA, Canada, the UK, and Australia, together with France and Korea (ranging from 20-24% in 2022 to 62-70% in 2024).

**Figure 38: Organizational and employee AI adoption have increased over time**



## Most employees use free, public generative AI tools at work, yet only a minority report their organization has a policy governing its use

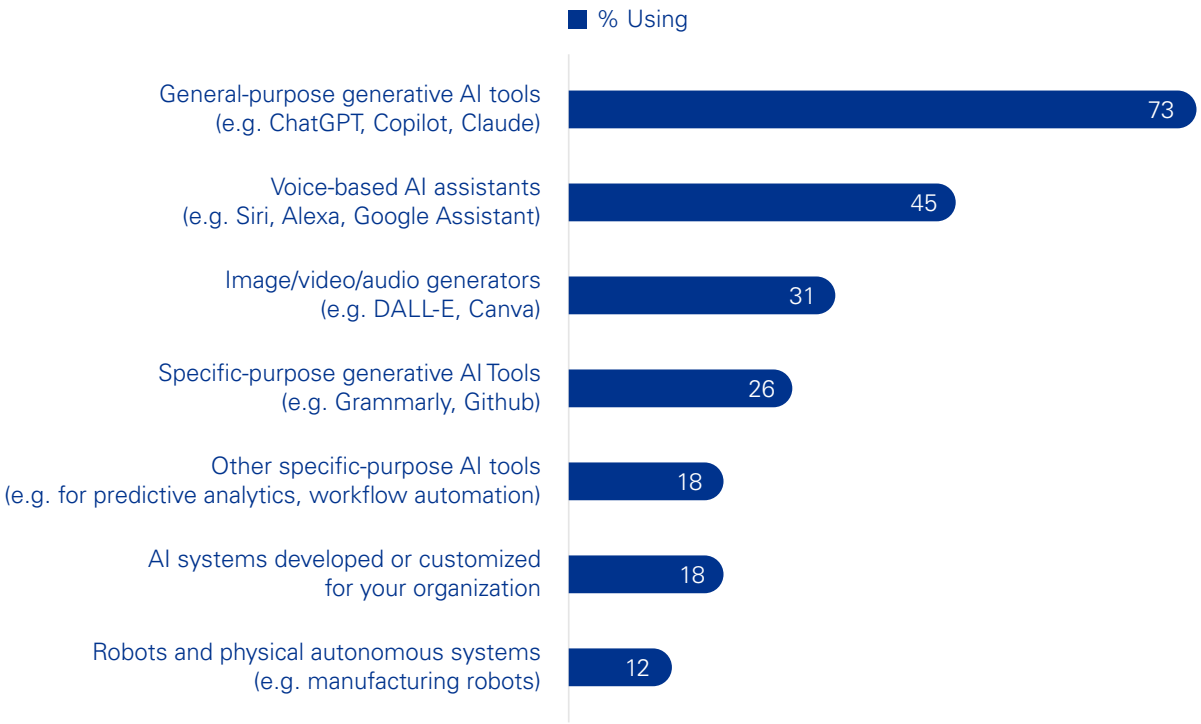
Employees that report using AI were asked to identify the main AI tools they use for work (see Figure 39). By far the most common tools—used by almost three in four employees—are general-purpose generative AI tools, such as ChatGPT. Voice-based AI assistants, such as Siri and Google Assistant, are the next most common, used by just under half of employees, followed by image, video and audio generators. These high-use levels likely reflect the broad accessibility of these tools, including the ability to use these tools through a natural language interface, combined with their wide utility across a range of work tasks and functions, and immediate usability without AI training or education.

Comparatively fewer employees use AI tools with a more specialized focus or specific purpose—such as Grammarly or predictive analytics tools—or AI systems developed or customized specifically for their organization. Even fewer use robots and physical autonomous systems.

Employees were also asked how they access these tools (see Figure 40). The majority (70%) say they use publicly available AI tools that are free to use, with a much lower proportion using public AI tools that require payment to access. Two in five report using AI tools that are provided or managed by their employer.

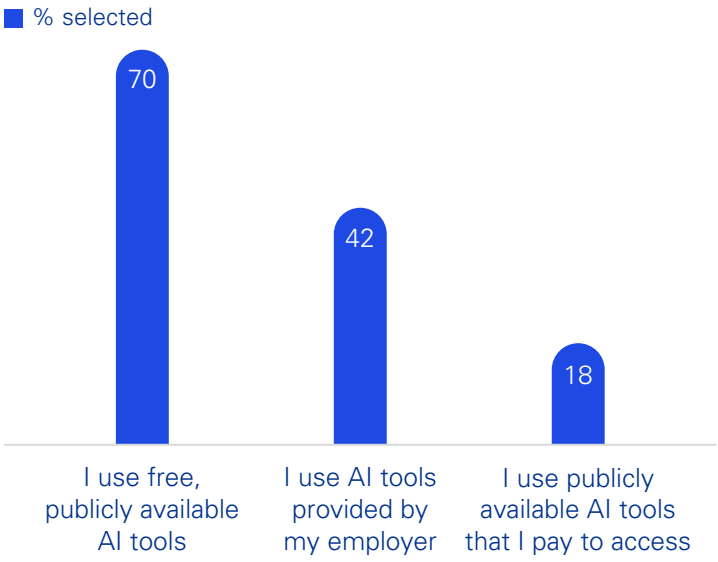
### Figure 39: Types of AI tools intentionally used at work

'What are the main types of AI tools you use intentionally for work? Select all that apply'



## Figure 40: Access to AI tools used at work

'How do you access AI tools used for work?'




Despite the extensive use of generative AI tools in the workplace, employees report that limited policies are in place to guide and outline appropriate use.

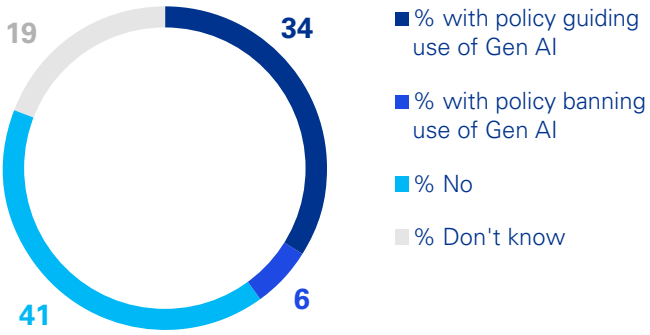
As shown in Figure 41, only two in five report that their organization has a policy or provides guidance on the use of generative AI tools at work. It is notable that almost one in five do not know if their organization has a policy, highlighting a significant gap between use and knowledge of workplace policies on generative AI tools.

## Emerging economies are leading in workplace adoption of AI

As shown in Figure 42, more employees in emerging economies report using AI at work compared to those in advanced economies (72% vs. 49% using AI at least semi-regularly). Similarly, those working in emerging economies are more likely to report that their organization uses AI (81% vs. 66% in advanced economies) and does so more extensively (57% vs. 36% have moderate to extensive use).[40]

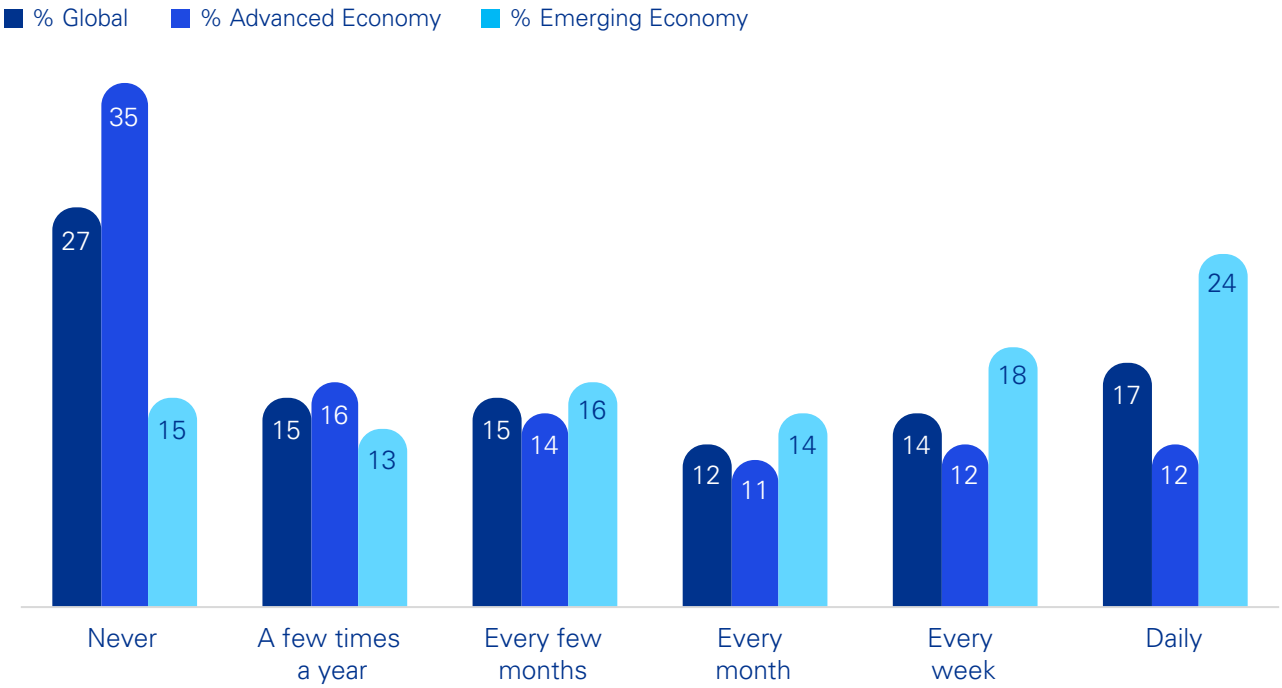
## Figure 41: Organizational policy or guidance on generative AI at work (employee reported)

'Has your organization put in place a policy or provided guidance on the use of generative AI at work?'



## Figure 42: Frequency of intentional use of AI at work

'In your work, how often do you intentionally use AI tools, including generative AI tools?'




Daily = 'most days' or 'multiple times a day'

To illustrate, as shown in Figure 43, 80 percent or more employees report using AI at work on a regular basis in the emerging economies of India, China, Nigeria, the UAE, Saudi Arabia and Egypt. This compares to less than 50 percent in the majority of the advanced economies. We find an almost identical pattern of findings across countries for the organizational use of AI.[41]

A few countries with advanced economies deviate from this trend. Norway, Singapore, and Switzerland have comparatively high workplace adoption of AI compared to other advanced economies, with more than 60 percent of employees using AI at least every few months or more, and over 75 percent reporting that their organization uses AI. This likely reflects the previously reported high levels of AI training, literacy, trust and acceptance of AI amongst people in these countries compared to those in other advanced economy countries (see Figures 7 and 13).

## One in two employees trusts AI at work

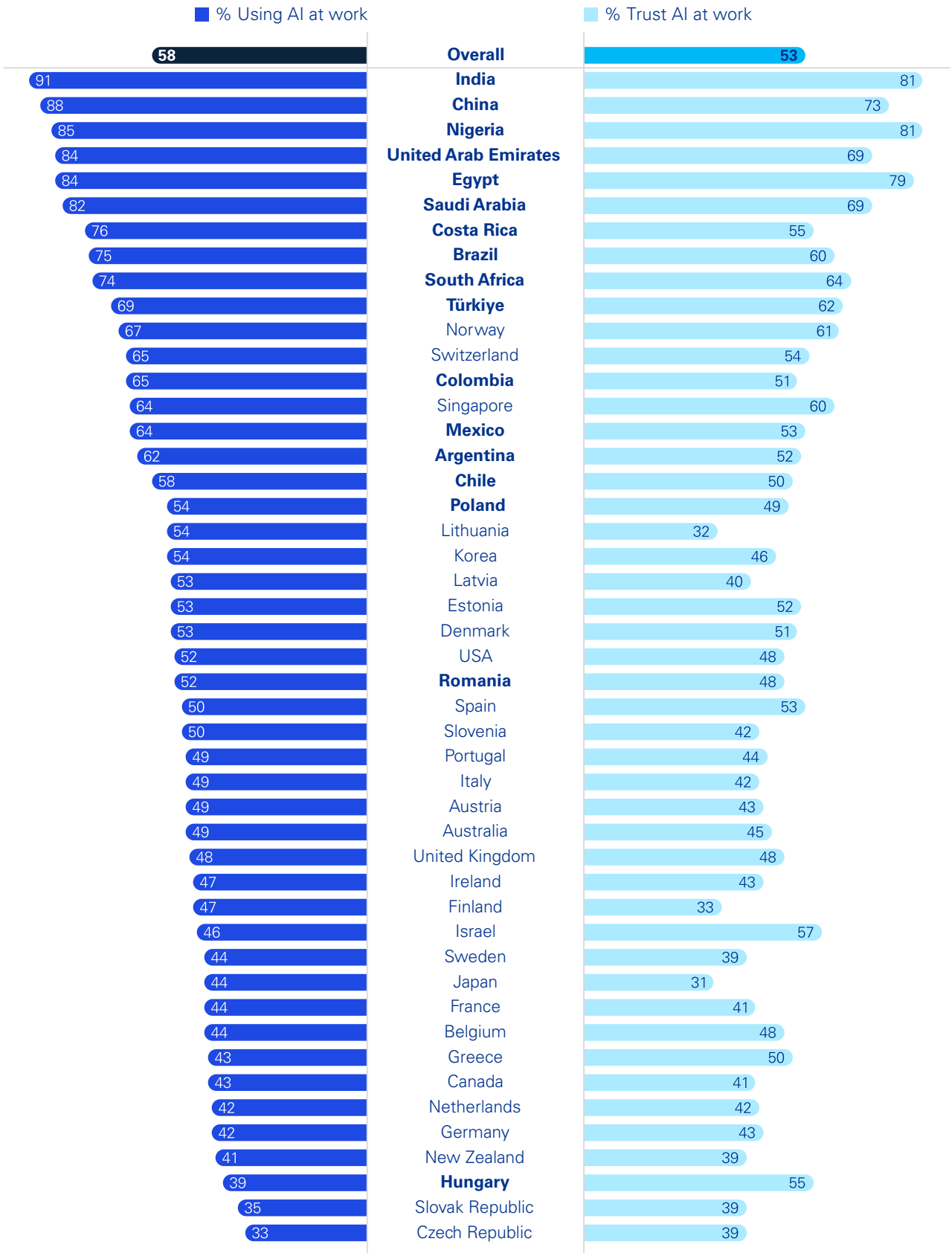
Respondents were asked how willing they are to trust AI systems for work purposes either by relying on the information and output AI provides to inform their work and decisions or in sharing relevant information and data to enable AI tools to perform tasks for them.

About half (53%) report trusting AI tools for work purposes, which is similar to the proportion of employees that use AI on a regular basis (58%). There are clear differences among countries, ranging between 31 percent in Japan to 81 percent in India and Nigeria (see Figure 43).

Trust is highest in the emerging economies, with an average of 63 percent of employees in these countries trusting AI for work, compared to an average of 45 percent in advanced economies.

Employees' trust in AI for work purposes is associated with their frequency of AI use at work (r=.46) and experiencing positive impacts of AI use at work (r=.53), highlighting the important role of trust in adoption. Trust in AI for work purposes is also associated with AI knowledge, efficacy, and AI training or education (r=.23-.45).

## Figure 43: Intentional use of AI at work and trust of AI at work




% Using AI on a semi-regular or regular basis: 'every few months', 'monthly', 'weekly' or 'daily'
% Trust AI at work = % Willing
Countries sorted by % Using AI at work
Bolding indicates countries with emerging economies

# Trust of AI at work and perceived organizational support for responsible AI use has declined in many countries

Employees' increased adoption of AI has coincided with a trend of declining trust in its use for work purposes (2022: M=4.5 vs. 2024: M=4.3), with a meaningful decline in 10 of the 17 countries. Brazil saw the largest decrease (77% vs. 56% trust, M=5.2 vs. 4.7), together with Japan (43% vs. 27% trust, M=4.2 vs. 3.6).

Given the low adoption of AI at work in 2022, this likely reflects employees' increased understanding of the capabilities and limitations of AI tools for work purposes. For example, as employees experience 'hallucinations' and errors when using generative AI tools, this is likely to have prompted a healthy recalibration of expectations and trust of these tools. Indeed, as previously reported, inaccurate outcomes are a commonly experienced negative outcome when using AI systems.

At the same time, employees' perceptions of organizational support and governance of responsible AI use also decreased in nine of the 17 countries surveyed. The largest decrease occurred in Finland, falling from 52% in 2022 to 41% in 2024 (M=4.6 vs. 3.8), together with Germany (M=4.4 vs. 3.8) and the Netherlands (M=4.2 vs. 3.7).

Taken together, these trends suggest that the rapid adoption of AI at work has prompted a recalibration of employees' trust in AI tools and an increased awareness of the need for organizational support and governance of responsible AI use.

## Many employees are using AI in complacent and inappropriate ways, augmenting risks for both organizations and individuals

A notable finding is the extent to which employees report using AI at work in complacent and inappropriate ways (see Figure 44).

Almost one in two employees who use AI admit to doing so in ways that contravene organizational policies and guidelines. For example, about half (48-49%) of employees report that they have uploaded sensitive company information, such as financial, sales, or customer information, or copyrighted material, into public AI tools. Such behaviors are most common of employees who report their organization has banned generative AI (67%) or has a policy guiding generative AI use (56%), compared to those in organizations without such policies (33%) or those who are unsure if there is a policy (38%). This suggests outright bans may be ineffective, and that simply having policies does not guarantee compliance; clear guidance and education on responsible AI use is needed.

Employees also report using AI in ethically ambiguous ways. Almost half (47%) say they have used AI in ways that could be considered inappropriate and even more indicate that they have seen or heard other employees using AI tools in inappropriate ways (63%). Fifty-six percent say they have used AI tools at work without knowing if it is allowed.

Over half (57%) of employees also admit that they have used AI in non-transparent ways, including presenting AI-generated content as their own or avoiding revealing when they have used AI tools to complete their work. This non-transparent use makes it even more challenging for leaders and managers to govern and manage employees' use of AI at work.

The complacent use of AI may also reduce the quality and accuracy of work. Over half (56%) report they have made mistakes in their work from AI use. This likely reflects using incorrect or 'hallucinated' AI-generated content from generative AI tools and may also include misinterpretation of AI recommendations or output. Two-thirds of employees report having relied on AI output at work without critically evaluating the information it provides (66%) and putting less effort into their work due to AI (72%).

A contributing factor to this complacent use may be a sense of pressure to use AI tools, with almost half (48%) of employees feeling concerned about being left behind if they do not use AI at work. In support of this view, there is a positive association between the extent employees feel strain at work and their complacent use of AI (r=.31).

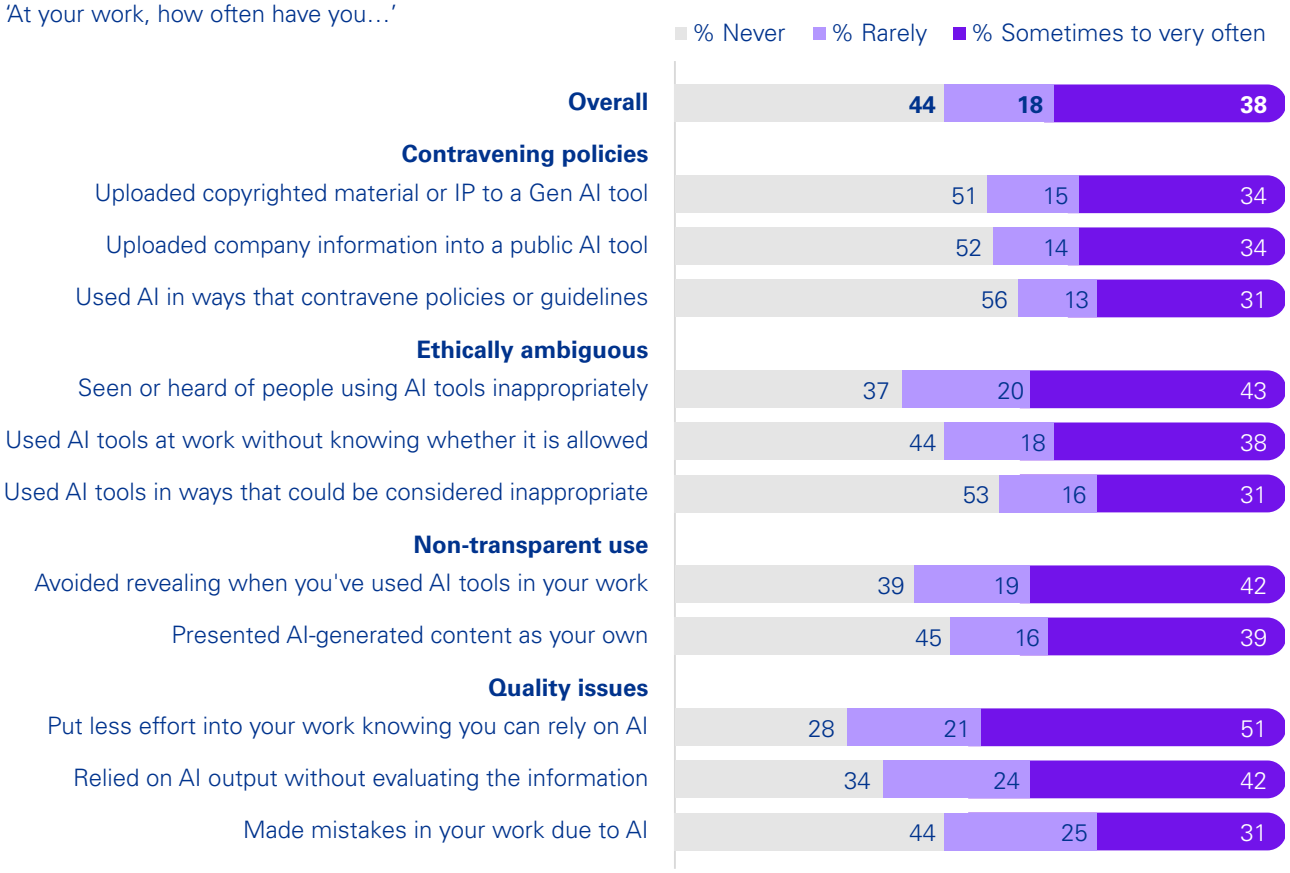
While the survey was anonymous to encourage honest responses from the participants, these findings may underreport the actual extent of complacent and inappropriate use of AI in the workplace, given social desirability bias.[42]

**48%**

of employees report that they have uploaded company information, such as financial, sales, or customer information, into public AI tools.

## Figure 44: Inappropriate and complacent use of AI at work

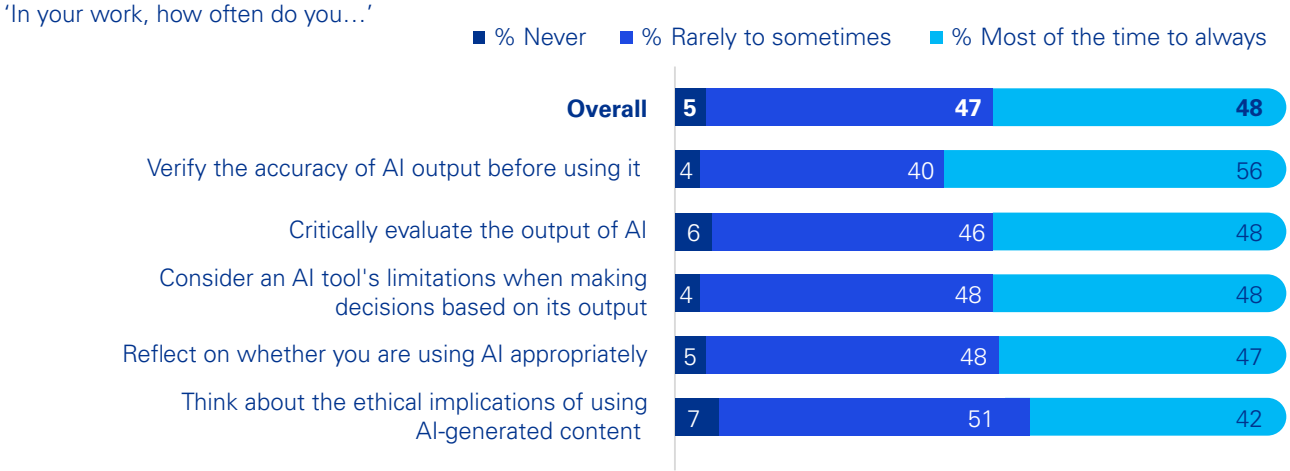
'At your work, how often have you…'




% Sometimes to very often = 'Sometimes', 'Often', or 'Very often'

## Figure 45: Critical engagement with AI at work

'In your work, how often do you…'




% Rarely to sometimes = 'Rarely', 'Sometimes'
% Most of the time to always = 'Most of the time', 'Always'

This inappropriate and complacent use of AI may in part reflect a lack of critical engagement in the way employees are using AI. As shown in Figure 45, on average, only half of employees say they regularly engage critically with AI at work. Rather, most employees do not routinely evaluate the output of AI or consider the limitations of AI tools when making decisions based on its output, or the ethical implications of using AI content. Most employees infrequently reflect on whether they are using AI tools appropriately or weigh up the benefits and risks of using them.

# What are the impacts of AI use at work?

## Employees experience performance benefits from AI, but also mixed impacts on workload, stress, collaboration, compliance, and surveillance

Employees in organizations that use AI were asked how AI has impacted a range of work processes and outcomes. They report a range of beneficial impacts on performance, contrasted with other complex, mixed impacts which potentially augment risks for organizations and employees.

Focusing on the beneficial impacts, as shown in Figure 46 (see blue bars), a majority of employees (54-67%) report that the use of AI tools in their workplace is delivering a range of benefits including increased levels of efficiency, improved access to accurate information, enhanced innovation and idea generation, higher work quality and decision-making, better use and development of skills and abilities, and improved knowledge sharing. Almost half (46%) report the use of AI tools has increased revenue generating activity in their organization. These findings highlight the significant performance benefits from AI.

However, the positive benefits of using AI tools are not guaranteed. A quarter to a third of employees report that the use of AI tools at work has not had an impact on these desired outcomes. For example, a similar proportion of employees report AI has had no impact on revenue generation as those reporting an increase. Furthermore, about one in ten report that the use of AI has actually reduced some of these desired outcomes. Whether or not AI use delivers beneficial outcomes is likely dependent on a combination of factors, including the nature of the work, the purpose and types of AI tools used, how AI is implemented and integrated into work design and organizational strategy, and the level of employees' AI literacy and capabilities.

Employees also report that the use of AI is having mixed impacts on workload, time spent on repetitive tasks, and stress and pressure at work (see Figure 46). While about two in five (36-40%) employees have experienced positive reductions, between one-quarter and two-fifths (26-39%) report increases in workload, repetition, stress and pressure from using AI tools. This is not surprising given the evidence that technological advancements can result in the intensification of work, highlighting the need for appropriate work redesign and change management.[43]

AI training (r=.24), knowledge (r=.42), efficacy (r=.41), and perceptions of organizational support for AI and responsible use (r=.56) are positively associated with experiencing beneficial impacts of AI use at work.

AI use is also having mixed impacts on workplace communication and collaboration. While about two in five report that AI tools have increased communication and collaboration, close to a fifth report that AI use has reduced it.

A third (35%) of employees report that the use of AI tools has resulted in increased compliance and privacy risks, such as contravening rules, policies and local laws. Since most employees report using free, publicly available generative AI tools, this may result in instances of uploading private, confidential or copyrighted material into public AI systems. One fifth of employees say using AI tools helps reduce compliance and privacy risks, which may reflect the growing use of AI for monitoring and managing cybersecurity threats as well as ensuring employee compliance with organizational policies.

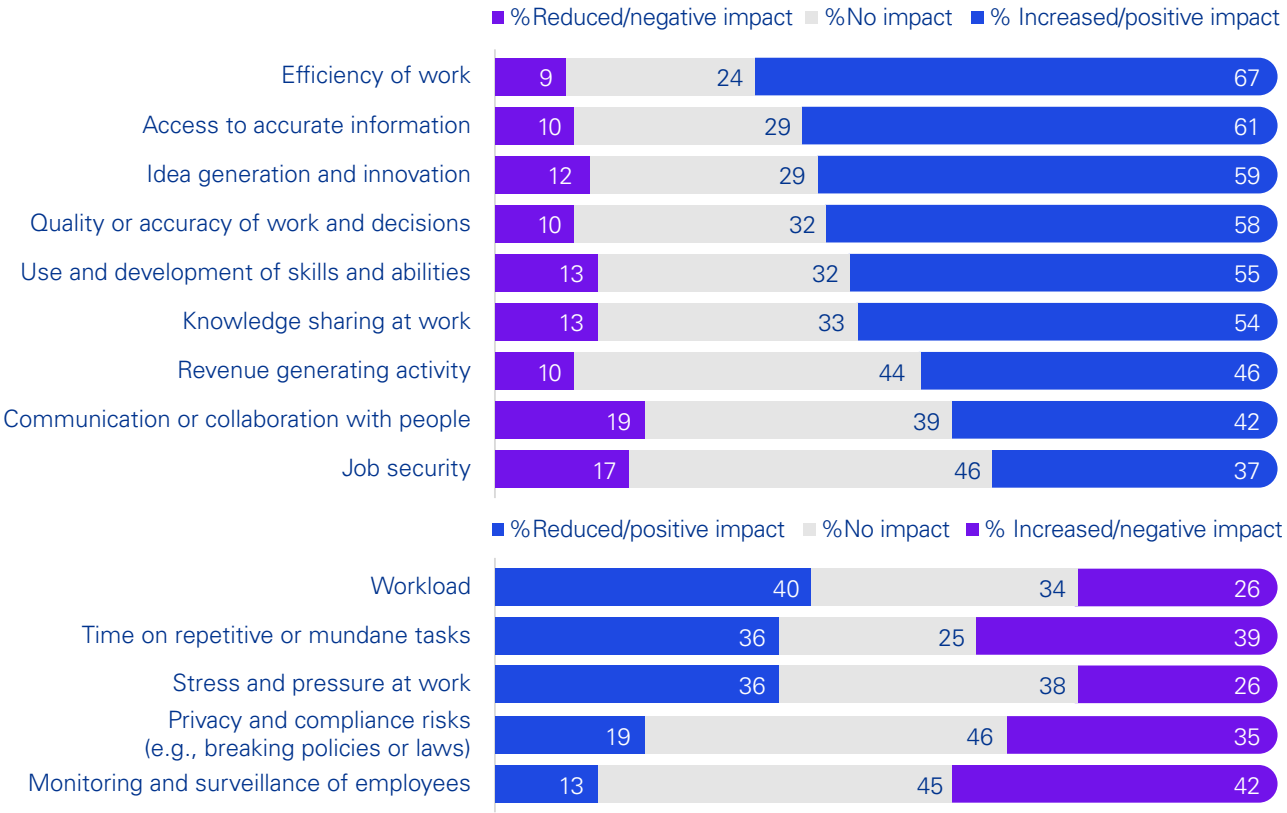
It is also notable that two in five report increased monitoring and surveillance of employees using AI technologies. This increase may have implications for trust in the workplace: while in some work contexts, monitoring and surveillance is required and beneficial for ensuring safe and trustworthy conduct and adherence to laws and governance policies, these control mechanisms can contribute to decreased levels of trust at work if perceived as signaling management distrust of employees.[44]

Most employees report that AI use in their workplace has either had no impact on job security or has increased it, with just under one in five reporting it had reduced job security.

This complex mix of impacts underscores the importance of understanding, managing and monitoring the implementation, use and impacts of AI at work, investing in appropriate work redesign, and building employee capabilities to support effective and balanced levels of human-AI collaboration.

## Figure 46: Impacts of AI use in the workplace as reported by employees

'In your experience, how has the use of AI tools in your workplace impacted:'




% Reduced = 'Slightly reduced', 'Reduced', or 'Greatly reduced'
% Increased = 'Slightly increased', 'Increased', or 'Greatly increased'

## The adoption of AI has changed how and by whom work is done with employees rapidly becoming dependent on AI and human-AI collaboration

The data suggests that about half of employees rely heavily on AI tools and collaboration with AI to perform their work, with two in five employees indicating that they sometimes or often cannot complete work without the help of AI (see Figure 47). This reliance is likely to increase over time given that half of employees say they regularly rely on AI to perform tasks rather than learning the skills to do so themselves.

These findings underscore the risk of employee skill degradation over time and align with our finding that deskilling and dependency on AI are key societal concerns and notable negative outcomes of AI adoption. This reinforces the need for thoughtful work design to ensure AI empowers humans to retain critical skills as well as focus on higher-skilled, meaningful work.

Our findings also reveal that about half of employees surveyed regularly choose to use AI to complete work, rather than collaborating with peers or supervisors. This has implications for achieving a diversity of inputs, as well as the development and retention of collaborative capabilities and processes in the workplace. It also highlights concerns about diminishing human interactions and connections from increased reliance on AI tools (previously reported in Figure 20).

## Most prefer AI involvement in managerial decision-making with human oversight

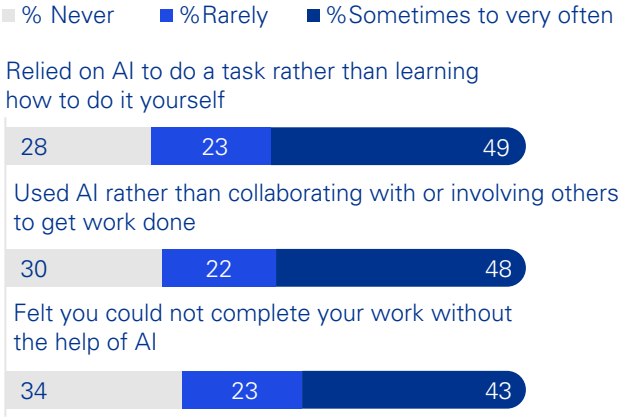
Further evidence of employees' support for human-AI collaboration comes from their views of the use of AI in managerial decision-making. Respondents were asked to choose the most acceptable weighting between human and AI involvement in decision-making related to work and resource allocation, hiring, promotions, and pay rises.[45]

As shown in Figure 48, most believe that AI should aid managerial decision-making, but want humans to retain most or equal control. Nearly half consider a 75 percent human and 25 percent AI decision-making split to be the most acceptable balance. The next most popular preference is an even 50/50 split, supported by just under a third of respondents.

Only ten percent believe AI should dominate managerial decision-making, and even fewer support a fully AI-driven approach where there is no human involvement. This highlights the lack of support for fully automated managerial decision-making or AI taking precedence over humans in important workplace decisions.

### Figure 47: Employee reliance on AI at work

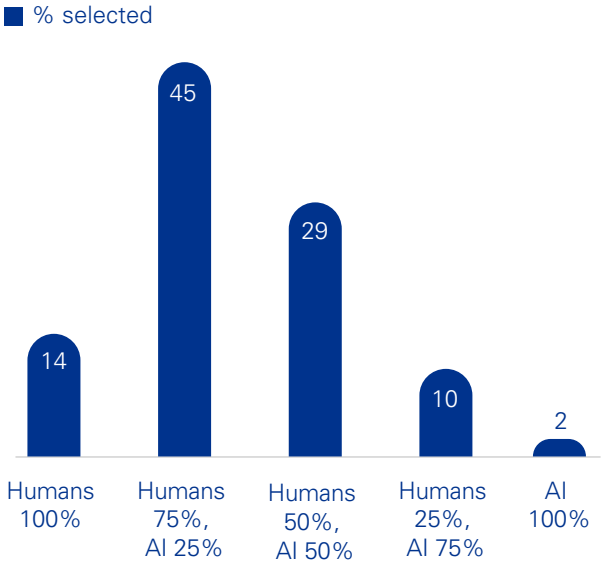
'At your work, how often have you…'




% Sometimes to very often = 'Sometimes', 'Often', or 'Very often'

### Figure 48: Preference for human–AI involvement in managerial decision-making

'Which of the following proposals do you find most acceptable for managerial decision-making activities?'



## Organizational support for AI and its responsible use is lagging behind adoption, particularly in advanced economies

The extent of complacent and inappropriate use of AI within the workplace highlights the importance of organizational support and governance of responsible AI use. Employees in *organizations that are actively using AI*, were asked whether their organization: a) has an AI strategy and culture, b) supports AI literacy and responsible use by employees, and c) has responsible AI governance practices in place, such as regular monitoring of AI systems, accountability systems to oversee AI use, and data privacy and security measures.

We find substantial variation between advanced and emerging economies (see Figure 49). In advanced economies, just over half of employees report that their organization has mechanisms in place to support AI adoption and responsible use, including a strategy and culture conducive to responsible AI adoption, adequate employee training, and governance processes. Only 55 percent believe there are adequate safeguards within their organization to ensure responsible AI use. While these findings are based on employee perceptions and awareness of these organizational support mechanisms, they suggest that just under half of organizations in advanced economies may be using AI without adequate support and governance.

In contrast, in emerging economies, about 70 percent say their organization has a clear AI strategy, offers responsible AI training, and 65 percent report AI governance policies. Furthermore, 71 percent feel assured that sufficient safeguards exist for responsible AI use. This higher level of organizational support for AI aligns with the greater reported employee use of AI and higher levels of AI education and training, AI knowledge, and efficacy reported in emerging economies.

These findings are based on employees who report working in organizations that are actively using AI. We anticipate considerably lower organizational support for responsible AI in organizations that are considering but have not yet actively taken steps to integrate AI into their operations.

Only

**55%**

of employees in advanced economies feel there are adequate safeguards within their organization to ensure responsible AI use.

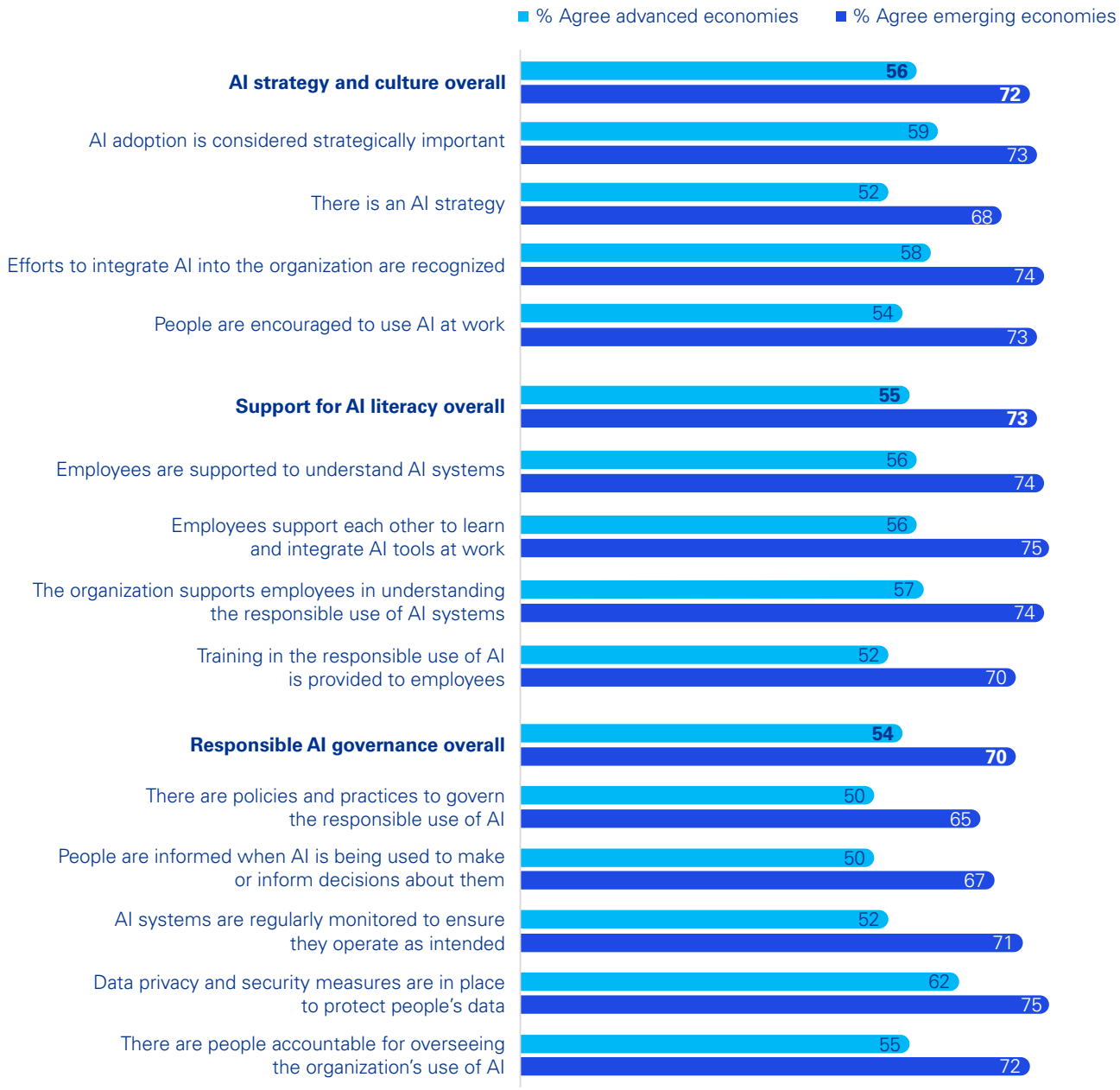
This suggests that just under

**half**

of organizations in advanced economies may be using AI without adequate support and governance.

## Figure 49: Perceived organizational support for AI and responsible AI use

'In relation to your organization, to what extent do you agree with the following?'

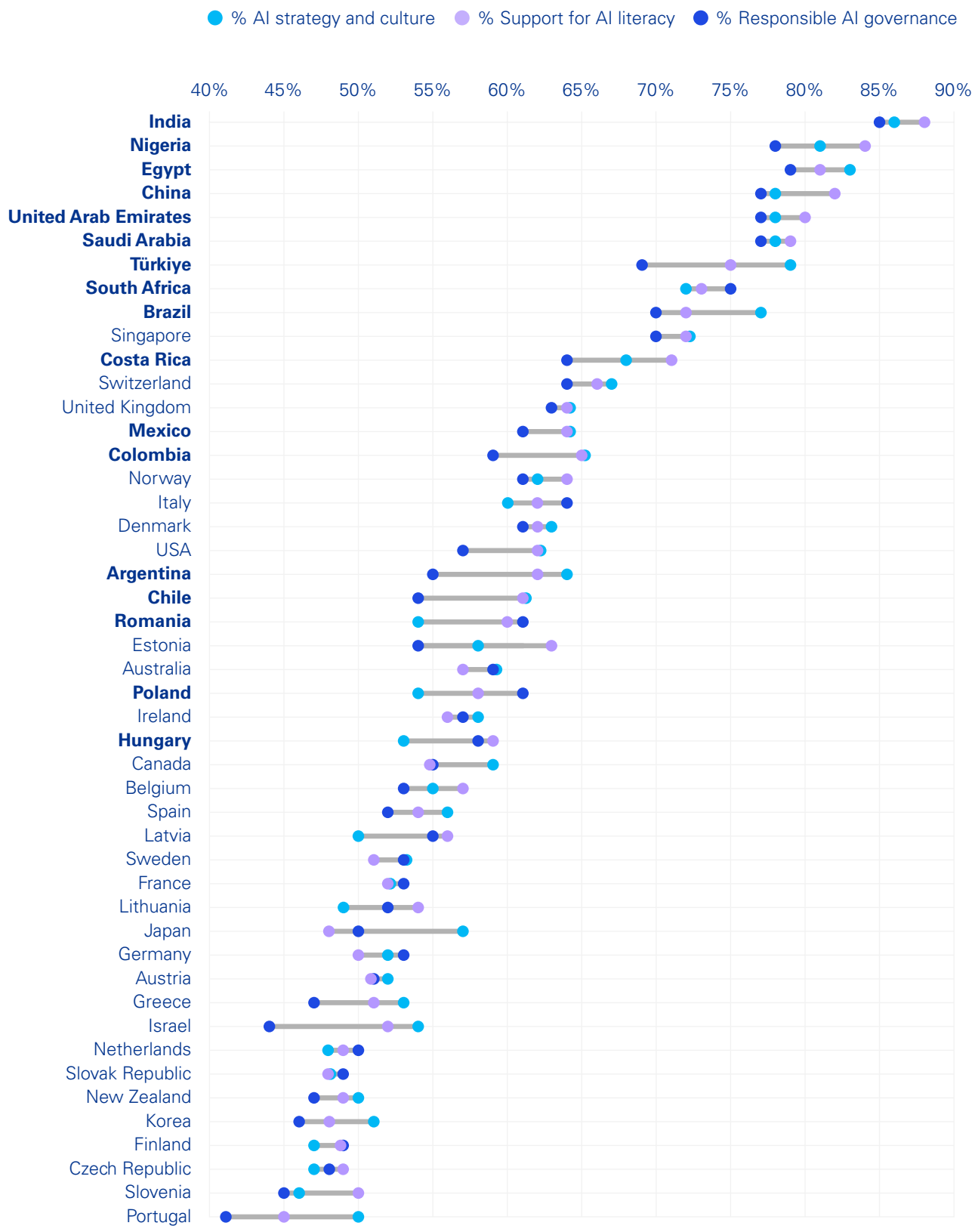



% Agree = 'Somewhat agree', 'Agree', 'Strongly agree'.
Based on employees working in organizations that are actively using AI.

Country-level data further illustrate these differences (see Figure 50).

Over 70 percent of employees in India, Nigeria, Egypt, China, the UAE, Saudi Arabia, Türkiye, South Africa, and Brazil report strong organizational support for responsible AI. Among advanced economies, Singapore, Switzerland, the UK, Norway, Italy, and Denmark lead, with at least 60 percent of employees reporting robust organizational support. In contrast, employees in Portugal, Slovenia, the Czech Republic, and Finland report some of the lowest levels of organizational support.

## Figure 50: Organizational support for AI and responsible use across countries




% Agree = 'Somewhat agree', 'Agree' and 'Strongly agree'; [7 point scale]. Based on employees working in organizations that are actively using AI. Bolding indicates countries with emerging economies.

## AI's impact on work and jobs: Only one in three believe AI will create more jobs than it will eliminate

Employees are conscious of the potential impact of AI on work and jobs (see Figure 51). Over half agree that the way they do their daily work will change because of AI.

In terms of job impacts, less than a third believe AI will create more jobs than it will eliminate. Rather, almost half believe the opposite—that AI will eliminate more jobs than it will create. This aligns with our earlier-reported finding that the potential for job losses from AI technology implementation is a key societal concern and is experienced or observed by two in five people.[46]

Employees are split in their views on whether AI can perform key aspects of their work and will replace jobs in their specific area of work. This likely reflects the diverse range of jobs, occupations and industries represented in the survey sample, and the extent to which AI systems and capabilities are useful in these jobs.

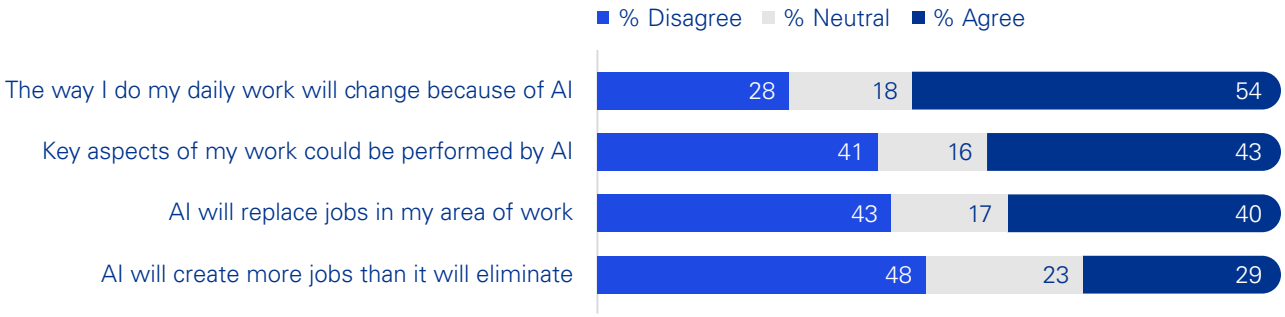
Our earlier finding that one in five employees report reduced job security from the use of AI suggests that a minority are directly experiencing AI-related job insecurity.

People in emerging economies are more optimistic about job creation from AI, with 39 percent agreeing AI will create more jobs than it will eliminate, compared to 23 percent of those in advanced economies. This is not blind optimism. Employees in emerging economies are also more likely than those in advanced economies to agree that key aspects of their work could be performed by AI (53% vs. 35%), how they do their work will change due to AI (64% vs. 48%), and more are concerned about being left behind if they don't use AI (56% vs. 42%).

We next examine what encourages employee use of AI at work, and, importantly, what predicts critical engagement with AI tools.

### Figure 51: Perceived impact of AI on jobs

'To what extent do you agree with the following?'




% Disagree = 'Somewhat disagree', 'Disagree', or 'Strongly disagree'
% Agree = 'Somewhat agree', 'Agree', or 'Strongly agree'

## What predicts the use and critical engagement of AI at work?

The findings on employee use of AI highlights that organizations must navigate a complex balance between promoting AI adoption to realize the benefits, while simultaneously encouraging thoughtful, critical engagement with AI tools that underpins responsible use.

To help inform how this balance can be achieved, we conducted statistical modelling to identify the key predictors of AI use and critical engagement with AI at work, using the same techniques explained in the section 'What are the key drivers of trust and acceptance of AI systems?'

The predictors examined align with the four pathways discussed earlier: AI literacy (knowledge pathway), perceived performance benefits of AI at work (motivation), perceived negative impacts of AI use (uncertainty), and organizational support for AI, AI literacy, as well as responsible AI governance (institutional pathway). Additionally, the impact of trust in AI at work was examined. These models were tested using data from employees in organizations that use AI.

Our analysis revealed that each of the four pathways predicts both the frequency of AI use at work and critical engagement with AI, but in different ways.

### The key predictors of employee use of AI at work

- AI literacy (B=.46)
- Organizational support of AI in the form of an AI strategy, culture, and support of AI literacy (B=.23)
- Performance benefits from AI use at work (B=.09)
- Responsible AI governance practices (B=-.09; associated with less frequent AI use)
- Trust in the use of AI at work (B=.05)
- Negative impacts of AI use at work, such as increasing workload, stress and pressure, and privacy and compliance risks (B=-.05; associated with less frequent use)

### The key predictors of employees' critical engagement with AI at work

- AI literacy (B=.41)
- Trust in AI use at work (B=-.24; associated with less critical engagement, indicating that too much trust may reduce employees' inclination to scrutinize AI)
- Performance benefits from AI use at work (B=.21)
- Responsible AI governance[47] (B=.11)
- Negative impacts of AI use at work (B=.06; suggesting employees become more critical in their own AI use when they experience downsides of AI in the workplace)

These combined results highlight that AI literacy is a key lever, as the strongest predictor of both AI use and critical engagement. Experiencing positive performance benefits from AI also motivates both use and critical engagement. In contrast, experiencing negative impacts from AI reduces adoption but can prompt employees to adopt a more critical and discerning stance.

Our findings show that trust in AI systems encourages employee adoption, but its negative impact on critical engagement highlights the need for organizations to avoid fostering blind, uncritical trust in AI tools. Instead, employees should be supported to calibrate their trust based on the technology's trustworthiness and reliability.

Cultivating an AI-friendly culture and strategy can help to encourage employees to use AI more frequently, whereas responsible AI governance mechanisms help to prompt deeper critical reflection when using AI tools. We explore the implications of these findings further in the Conclusions and Implications section.

# How do demographic factors influence use and perceptions of AI at work?

There are notable differences between subgroups of employees in their use, trust, perceptions and realized benefits from AI use in the workplace, all of which have implications for the management of AI. We note at the outset that there are no gender differences in AI use or attitudes toward AI at work.

## Employees who are younger, AI trained, university-educated, higher-income earners and managers are more likely to use and trust AI at work and believe AI will change aspects of their work

As shown in Figure 52, younger people (aged under 35), those with AI training, university-education, or higher incomes, and managers are more likely to use AI for work purposes and to trust AI in the workplace. These groups are also more likely to report that their organization uses AI, fosters an AI-driven culture, and supports responsible AI use. The largest differences are seen in relation to AI training and income.

This pattern mirrors our previously reported findings that these groups are more trusting and accepting of AI use in society and have higher levels of AI literacy, (see Figures 33-35).

These groups are also more likely to agree that AI will perform key aspects of their job and agree that AI will change the way they do their daily work (67% AI trained vs. 43% no AI training; 62% university educated vs. 44% no university education; 41% managers vs. 21%-29% other occupations). Managers and high-income earners are also more likely to agree that AI will create more jobs than it will eliminate (65% managers vs. 36-56% other occupations; 54% high-income vs. 26% and 17% of middle- and low-income respondents, respectively).

Taken together, these findings suggest that these groups are better positioned to integrate AI into their work and realize performance benefits (see below). Conversely, employees without these attributes—namely older, lower-income employees, those without AI training or university education—may be at risk of being left behind and experience what has been called 'AI divide' in terms of progression, opportunities and benefits.

## High-income earners, those with AI training and managers report the most positive impacts from AI at work

As shown in Figure 53, higher-income earners, those with AI training, and people in managerial positions are more likely to report experiencing positive impacts from AI at work compared to middle- and low-income earners, employees without AI training and those in non-managerial occupations.

To illustrate specific positive impacts, high-income earners are more likely to have experienced increased quality or accuracy of work (72%) compared to middle- (54%) and low-income respondents (44%). Those with AI training and managers are more likely to report increased efficiency due to AI (76% vs. 56% without AI training; 75% of managers vs. 55-67% in other occupations) and increased revenue-generating activity from AI (55% vs. 34% without AI training; 59% of managers compared to 40-43% in other occupations).

## Younger employees, those with AI training, and those with higher incomes are more likely to engage in inappropriate and complacent use of AI at work

It is notable that some of these groups are also the most likely to use AI inappropriately. After accounting for frequency of AI use at work in analyses,[48] younger employees, those with AI training, and higher-income earners are more likely to use AI in their work in inappropriate or complacent ways.

As shown in Figure 53, 65 percent of younger employees (aged under 35) report engaging in complacent and inappropriate use behaviors, compared to half or fewer of older employees ([effect size] $n^2$=.04).[49] Similarly, employees with AI education or training report higher rates of complacent and inappropriate use (63% vs. 46%; $n^2$=.03), though they are also more likely to engage critically with AI in their work (53% vs. 40% most of the time or always; $n^2$=.03).

Income also plays a role, with higher-income earners (70%) being the most likely to report complacent or inappropriate AI use. Notably, they are also more likely to engage in AI behaviors that contravene AI policies than other income groups ($n^2$=.03).

While frequency of use explains some of the variation in inappropriate and complacent use, it does not fully account for the observed differences in these groups. Other underlying factors such as understanding of AI, workplace norms, or training, may shape how AI systems are being used. For example, these groups may have developed ways of using and relying on AI in their work before guidelines were established, leading to the formation of unhealthy complacent norms. The higher trust levels in AI among these groups may also influence them to over-trust and rely on these technologies more than other groups. In addition, these groups may feel that their heightened understanding of AI or seniority gives them license to decide how best to use AI.

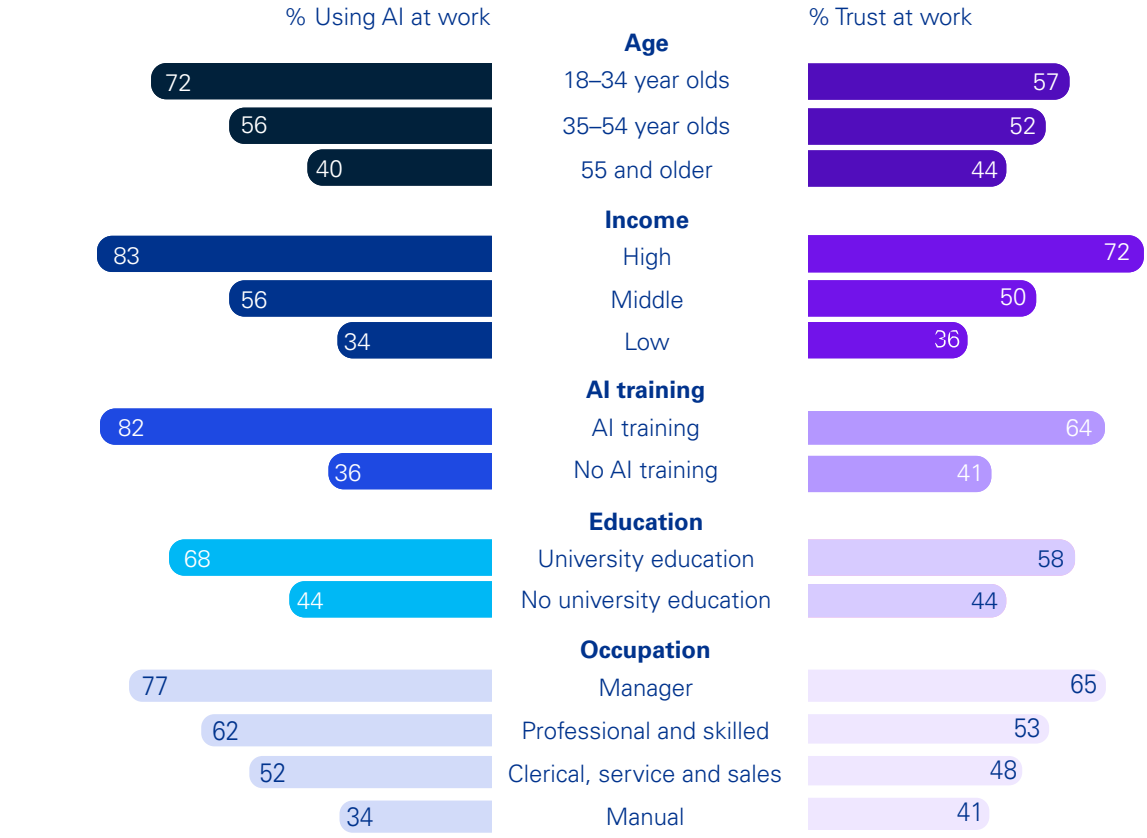
## Employees working in the IT, finance and insurance, and media and communications sectors report the highest AI adoption and those in government and public administration report the lowest adoption

We sampled employees in each of the 18 sectors shown in Figure 54.[50] Sampling was naturally occurring rather than representative of each industry and ranged from 527 employees in the real estate industry to 3,415 employees in the manufacturing sector and are based on employee perceptions and experiences. As such, the findings should be interpreted as indicative of broad trends.

Our analysis revealed statistically significant differences between industries on a range of indicators, most notably:

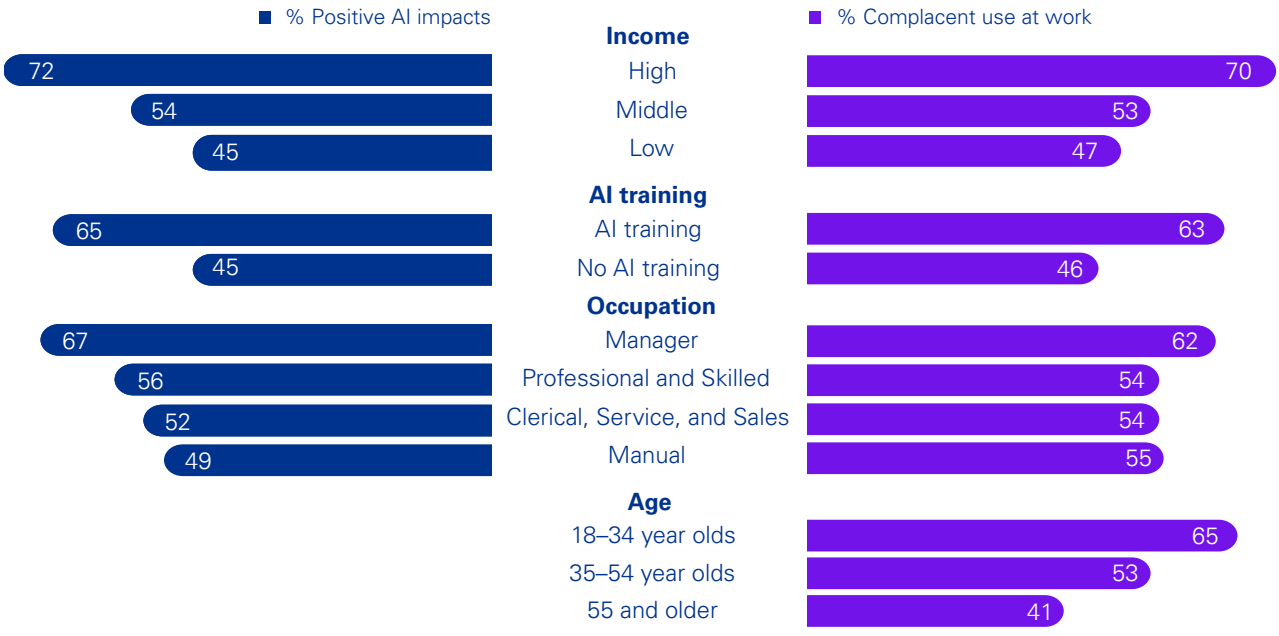
- Employees in the Information Technology (IT), Media and Communications, and Financial and Insurance sectors report the highest use of AI at work (72-85%, see Figure 54) and greatest organizational adoption of AI (90-94%).
- Employees in the IT and Financial and Insurance sectors also report the greatest organizational support for AI (75-76%), trust in the use of AI at work (62-67%), beneficial impacts from AI use (63-66%), and job impacts from AI (68-72%).
- In contrast, employees in the Government and Public Administration, Healthcare and Social Assistance, and Transport and Logistics sectors report the lowest employee adoption of AI (43-47%), organizational adoption (61-63%), organizational support for AI and its responsible use (55-60%), and the least beneficial impacts from AI (48-52%).
- Employees in the Arts, Entertainment and Recreation Services and Healthcare and Social Assistance sectors report the lowest trust in AI at work (46-48%) and are the least likely to believe that AI can perform key aspects of their work (33-35% agree).
- After accounting for frequency of use in analyses, there are no differences in complacent or inappropriate use between industries.

## Figure 52: Demographic differences in trust and use of AI at work



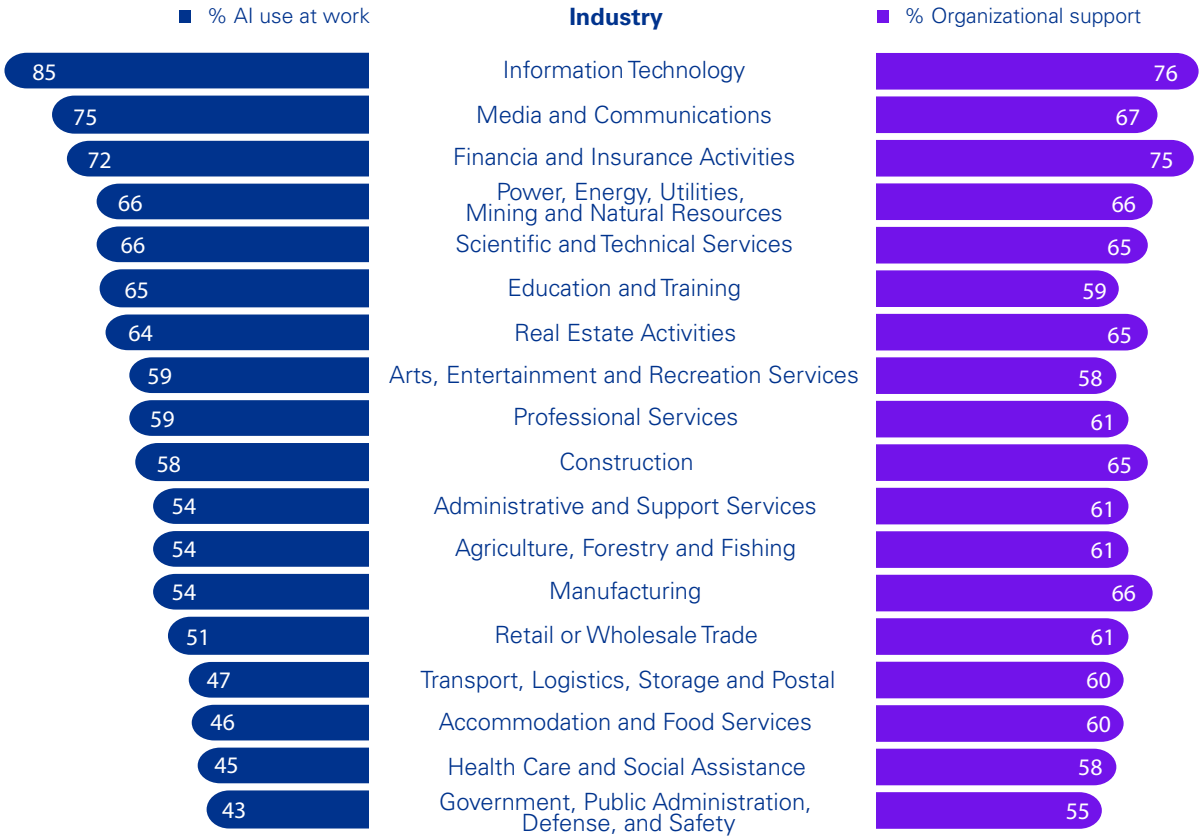

% Trust at work = 'Somewhat willing', 'Mostly willing', 'Completely willing'
% AI use at work = 'Occasionally (every few months)' to 'Always (multiple times a day)'

## Figure 53: Demographic differences in complacent use and positive impacts of AI




% Complacent use at work = 'Rarely', 'Sometimes', 'Often', and 'Very often'
% Positive AI impacts = 'Slightly increased', 'Increased', 'Greatly increased'

## Figure 54: Industry differences in use of AI and organizational support for AI




% AI use at work = 'Occasionally (every few months)' to 'Always (multiple times a day)'
% Organization Support = 'Somewhat Agree', 'Agree', 'Strongly Agree'

## In summary

Taken together, these findings reveal a complex and nuanced picture of AI use in the workplace. A majority of employees are intentionally using AI at work, and experiencing positive impacts, particularly performance and efficiency benefits. However, there are mixed effects from AI integration, particularly on workload, stress, and collaboration. Many employees are using AI in ways that are inappropriate or complacent, with organizational support and governance for responsible AI use perceived to be lagging, particularly in advanced economies. These factors, combined with the insight that most employees use free, publicly available generative AI tools in organizations that lack clear policies on its use, opens up substantial organizational risk. While most employees trust AI at work and accept its involvement in managerial decision-making, rapid adoption is reshaping workflows and deepening dependency on human-AI collaboration.

In the final empirical section, we examine AI use by students who represent the workforce of the future.

SECTION THREE

# Student attitudes towards AI in education

Respondents who were currently studying were asked about the intentional use of AI in their studies, the types of AI tools they use, if their education providers support responsible AI use, and the impact of AI use in education.

The majority of students were enrolled in university education (65%) or a vocational, trade or technical program (16%), with the remainder in secondary education (18%; see Appendix 2 for sample details).

# How is AI being used by students?

## Four in five students regularly use AI in their studies

Most students (83%) use AI in their studies on a regular basis, with half using it weekly or daily. Eighty-three percent of students also use AI for personal, non-study-related purposes at least semi-regularly.

Students are more likely to use AI in their studies than employees are in their work (83% vs. 58% use AI regularly or semi-regularly; see Figure 55).

About half of students (53%) report trusting AI tools in their studies, which mirrors the finding for employees (52% trust).

While about half (53%) report receiving AI education or training, 72 percent indicate that they have at least moderate knowledge about AI and feel they can use AI tools effectively.

Collectively, these results suggest most students feel confident in their knowledge and ability to use AI systems.

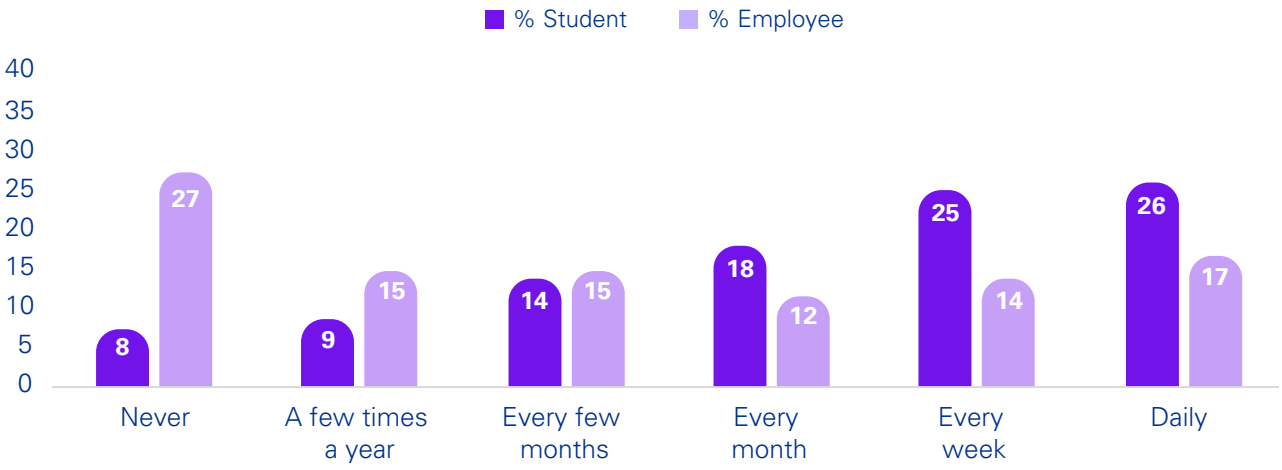
Of the few students who do not use AI in their studies (8%, n=195), the most common reasons are that they prefer to do their work without AI (55%), followed by the belief that AI tools are not helpful or required (34%), and that AI will have a negative impact on their learning (31%).

## Freely available general-purpose generative AI tools are most used by students

Mirroring the pattern for employees, students are most likely to use general-purpose generative AI tools (89%) and voice-based AI assistants (42%) in their studies, (see Figure 56), and are much more likely to use free, publicly available tools (89%) than tools provided by their education provider (26%), or those that require payment to access (12%).

### Figure 55: Frequency of student use of AI compared to employee use of AI for work

'In your studies/work, how often do you intentionally use AI tools, including generative AI tools?'




Daily = 'most days' or 'multiple times a day'

## Many students use AI inappropriately or complacently

Only half of students (52%) who use AI in their studies critically engage with it on a regular basis, for example by evaluating AI output or verifying its accuracy before using it, and considering the limitations of an AI tool when making decisions based on its output. Rather, many students report using AI in complacent or inappropriate ways (see Figure 57).

Almost three in five (59%) students report having used AI in ways that contravene their education provider's policies or guidance. Over half (56%) say they have used AI tools in ways that could be considered inappropriate, and 84 percent state that they have seen or heard of other students using AI tools in inappropriate ways.

Most report using AI in ethically ambiguous and non-transparent ways, such as using AI tools without knowing whether it is allowed, avoiding revealing when they have used AI tools in their coursework, and presenting AI-generated content as their own.

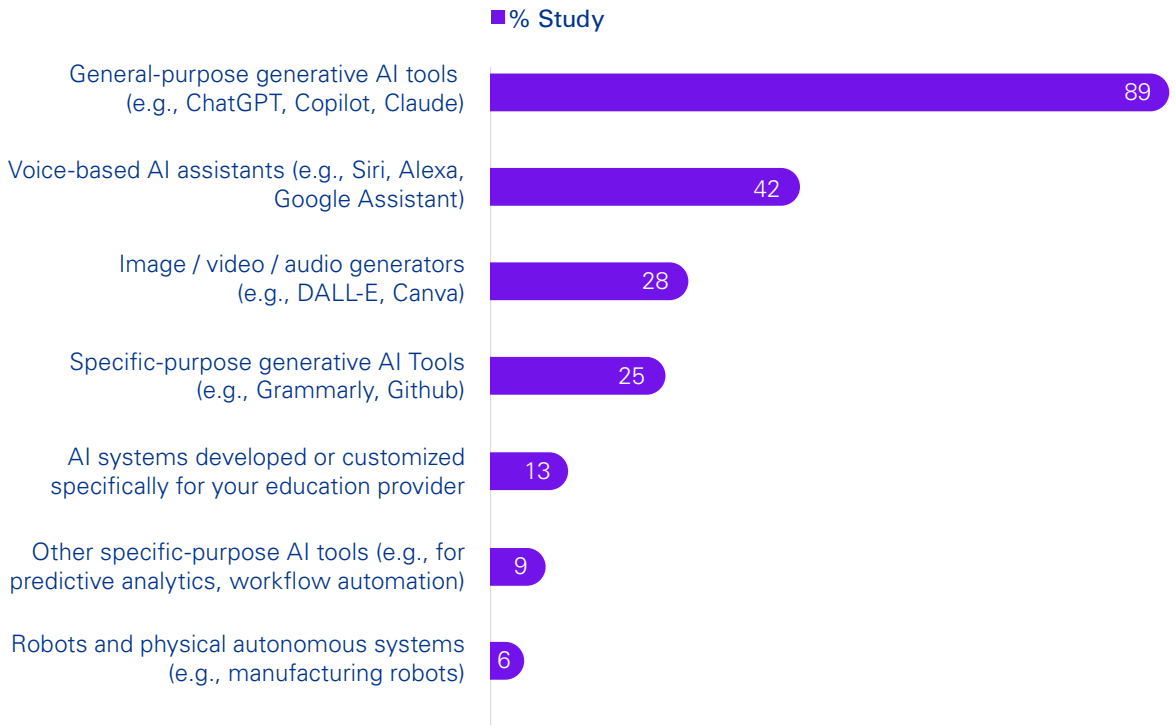
The findings also suggest that students are becoming increasingly dependent and over-reliant on AI tools in their studies, with implications for learning. Over three quarters say they have relied on AI to complete tasks rather than learning how to do them themselves, or felt unable to complete their coursework without its help (see Figure 57). Eighty-one percent say they have put less effort into their studies or assessment knowing they can rely on AI, and two-thirds have made mistakes in their work due to AI.

One potential contributor to the inappropriate and complacent use of AI may be a sense of competitive pressure to use AI tools, with half of students indicating they are concerned about being left behind if they don't use AI tools in their studies. Such competitive pressure could lead to increased use and greater dependence on AI, potentially cascading into complacent use.

Students are more likely to report inappropriate or complacent AI use and over-reliance on AI in their studies than employees are in their work. For example, around three quarters (76%) of student AI users say they have relied on AI output without evaluating the information or felt unable to complete their work without AI (77%), compared to two thirds (66%) of employees.

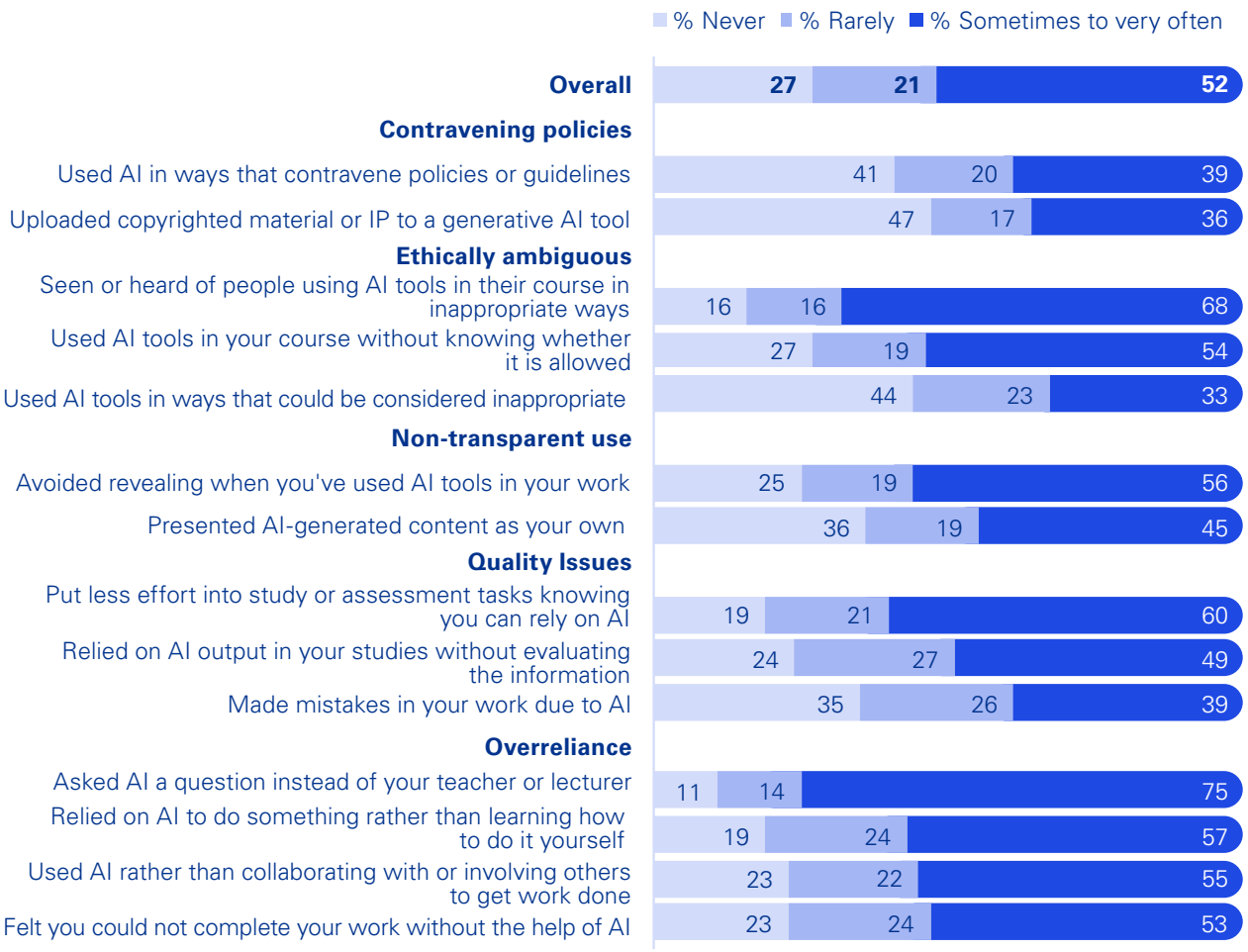
### Figure 56: Types of AI tools intentionally used for study, compared to employees

'What are the main types of AI tools you use intentionally for study? Select all that apply'



## Figure 57: Inappropriate and complacent use of AI in education

'As a student, how often have you...'




% Sometimes to very often = 'Sometimes' or 'Often' or 'Very often'

# What are the impacts of AI use in education?

## Students experience positive impacts of AI use in education, but AI's influence on social dynamics, critical thinking, and fairness and equity is mixed

Figure 58 shows the impacts of AI use in education. The purple bars show a positive impact, for example by increasing efficiency and decreasing stress and pressure. The blue bars indicate a negative impact, for example by reducing critical thinking and increasing time on mundane tasks.

As shown in this figure (see purple bars), the majority of students report notable positive impacts from the use of AI in their education, including increased efficiency, quality and accuracy of work, idea generation and innovation, and the personalization of learning. Over half also report reduced workload and stress and pressure.

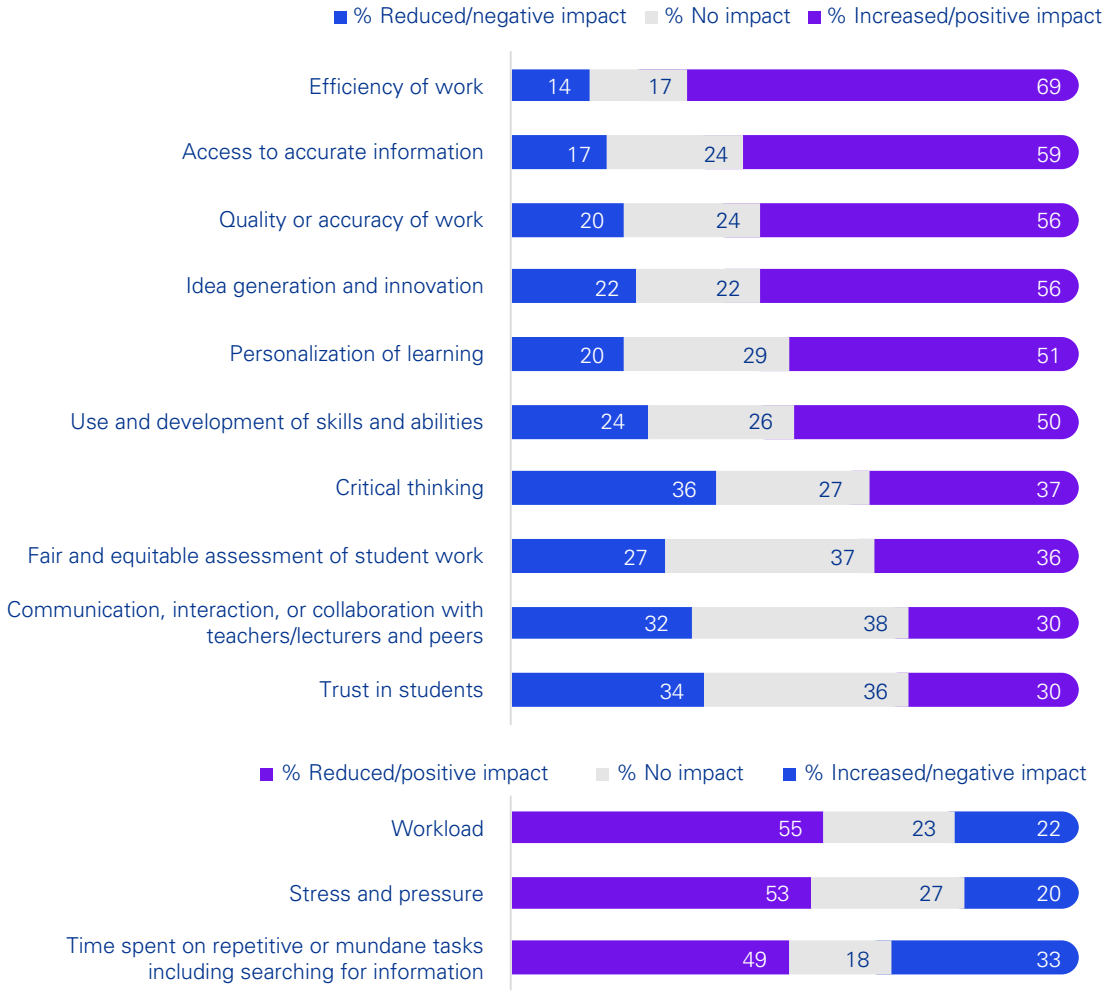
However, there are also mixed impacts. A quarter to a third of students (27-36%) report the use of AI in education has reduced critical thinking, as well as communication, interaction, and collaboration with instructors and peers, trust of students by instructors and peers, and the fairness and equity of assessments, while similar proportions report AI has had a positive impact on these outcomes. There are also mixed impacts on skill development and time spent on mundane tasks, with almost half of students reporting positive impacts and a quarter to a third reporting negative impacts.

These findings suggest that while AI can offer substantial advantages—particularly for completing tasks—AI use may also inadvertently hinder key essential interpersonal and cognitive skills, and as well documented, raise challenges for the fairness and equity of assessment.

Students' perceptions of the impacts of AI on jobs and the world of work broadly mirror those reported for employees. Fewer than one in three believe AI will create more jobs than it will eliminate, with almost half disagreeing.

## Figure 58: Impacts of AI use in education as reported by students

'In your experience, how has the use of AI tools in your workplace impacted:'




% Reduced = 'Slightly reduced', 'Reduced', or 'Greatly reduced'
% Increased = 'Slightly increased', 'Increased', or 'Greatly increased'
Purple bars indicate positive impacts.

## Support for responsible AI use in education is lagging adoption: only half of students report their education provider has a policy guiding generative AI use

Despite the pervasive use of AI by students, only half of the students surveyed (49%) believe their education provider has appropriate safeguards in place to make them feel comfortable with the use of AI in learning and teaching.

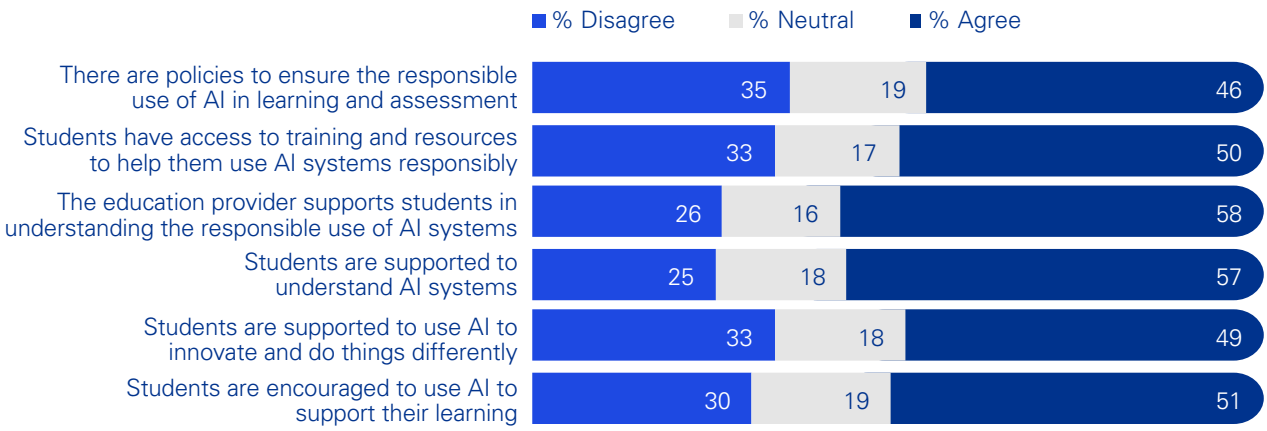
Only half report their education provider supports responsible AI use by having policies in place to ensure equitable use in learning and assessment and providing students access to training and resources on responsible use (see Figure 59). This low investment may reflect that only half of students report that their education provider encourages students to use AI in their learning and supports them to innovate with AI.

Given the high use of generative AI by students, it is notable that less than a third report that their education provider has a policy in place to guide the responsible use of generative AI by students, and one in five indicate that there are policies banning generative AI use (see Figure 60). A quarter of students do not know if there is a policy in place, suggesting a lack of awareness may be contributing to complacent use.

These student-reported insights suggest many education providers are not adequately supporting students in the responsible use of AI or are not making students sufficiently aware of relevant policy, training and resources.

## Figure 59: Education provider support for responsible AI use as reported by students

'In relation to your education provider, to what extent do you agree with the following?'




% Disagree = 'Somewhat disagree', 'Disagree', or 'Strongly disagree'
% Agree = 'Somewhat agree', 'Agree', or 'Strongly agree'

## Figure 60: Education providers' guidance on generative AI use for students

'Has your education provider put in place a policy or provided guidance on the use of generative AI for students?'


### In summary

These findings highlight that while most students are using and benefiting from AI, the complacent and inappropriate use of AI in education is widespread, and students are experiencing mixed impacts from AI use. Furthermore, education providers appear to be lagging in providing adequate training, resources and policy guidance to support and enforce the responsible use of AI by students. These findings have implications for the effective development of critical skills and the integrity of assessment in the AI age, and the future of work, as these students become the workforce of the future.

We next discuss the implications of these findings and the broader research insights.

# Conclusion and implications

The research insights from this global survey highlight the current and future opportunities and challenges of responsibly stewarding AI into work, education, and society.

Our findings reveal rapid adoption of AI despite substantial public ambivalence toward its use. Although a clear majority recognize the technical competence, utility, and benefits of AI, fewer are assured of its safety and security, and many are concerned about the societal impacts. This ambivalence manifests in the cautious acceptance of AI coupled with limited trust, and optimism about its benefits coupled with worry about the risks.[51]

Underlying this ambivalence is the tension between realizing the benefits of AI and ensuring its responsible use. This tension is evident at multiple levels:

- At the societal level, governments seek to realize the national economic and productivity gains from AI and harness its potential to transform social services and address societal challenges, whilst also exercising their responsibility to protect societal values and safeguard citizens from harm and unfair treatment. Some jurisdictions view ongoing and significant investment in responsible AI as key to fostering competitive advantage.[52]
- Citizens want to benefit from the promise of AI, while feeling safe and avoiding manipulation, fraud, privacy and IP loss, bias, and the damaging societal consequences of prolific mis- and disinformation.
- At the organizational level, leaders seek to realize enhanced productivity, innovation, value creation and competitive advantage from AI, whilst mitigating material and reputational risks and building sustained stakeholder trust.
- At the individual level, employees and students seek to enhance efficiency, quality and creativity in work and study, while avoiding deskilling, loss of jobs and the erosion of meaningful human connection. Some feel they have little choice but to adopt AI, fearing that not using it risks them becoming uncompetitive and left behind.

This tension helps explain why the pace of AI adoption in the quest for performance gains has often outstripped AI literacy, training, governance, and regulation. It is also why there is a public mandate for stronger regulation and governance of AI, and growing desire for assurance of its trustworthy use.

Effectively navigating this tension is one of the grand challenges of our time[53] and will require proactive and sustained action and effort from multiple actors at all levels.

To help address this challenge, we draw out the insights and implications of the research for key groups at the forefront of AI adoption, integration, governance and regulation. These include government policymakers, regulators and citizens; organizational leaders, managers and employees; and education providers and students.

## Emerging economies are leading in public and employee AI adoption, trust, acceptance and realized benefits

A key insight is the notable difference in adoption and sentiment toward AI between countries with emerging and advanced economies. People in emerging economies report accelerated adoption and a pattern of greater trust, acceptance, and positive attitudes toward AI. They also self-report higher levels of AI literacy and training, realized benefits both in work and society, and organizational support and governance for responsible AI use.[54] This pattern is particularly strong in countries such as India, China, Nigeria, Egypt and the UAE.

This pattern may be due to the increasingly important role that transformative technologies play in the economic development of these countries[55] and the greater relative benefits and opportunities AI affords people in emerging economies.[56] For example, AI systems may help fill critical resource gaps in these countries by enabling access to quality information and services where access is limited.

AI may provide augmented opportunities for people and organizations in emerging economies to overcome economic disadvantage and barriers. By bridging gaps in language, skills, information or networks, people in these countries may enhance their competitiveness and be able to seize a broader range of work and economic opportunities, including access to global markets. This potential may encourage a growth mindset that motivates trust, acceptance, and use of technology as a means to accelerate economic progress, prosperity, and quality of life. It may also motivate investment in AI training and literacy as a foundation for realizing and augmenting the benefits.

The greater levels of trust and acceptance seen in emerging economies can be explained, in part, by the pathways in our model. Higher levels of AI literacy (knowledge pathway), greater perceived and experienced benefits (motivational), and more favorable views of the adequacy of regulation and confidence in industry to develop and use AI responsibly (institutional) help to reduce concerns about risks (uncertainty pathway) and shape the view that benefits outweigh risks.

Similar pathways also help to explain why emerging economies are leading in AI workplace adoption and trust at work, with employees reporting more beneficial outcomes from organizational AI use, as well as higher levels of AI training and literacy and more perceived organizational support for responsible use, which helps mitigate risks and uncertainty.

These insights raise the question of whether governments and organizations operating in advanced economies need to augment investment and support in AI training and literacy, as well as strategic use and governance of AI to help realize benefits and support adoption.

Looking ahead, the nations that accelerate in responsible adoption may be uniquely positioned to gain long-term competitive and strategic advantage if AI becomes a central driver of productivity, innovation, and progress on societal challenges, such as climate change. This potential advantage, combined with the increasing importance of AI for national security, could prompt new dynamics in international relations, including debates around access to AI technologies and whether restrictions might emerge in response to perceived strategic or economic gains.

While a challenge to AI adoption, we caution against viewing the lower trust and acceptance in advanced economies as a deficit. Rather it can be viewed as appropriate rational caution based on the perceived state of AI use in society, the current levels of governance, regulation and standards supporting it, coupled with low levels of AI literacy. Well-placed trust in AI systems is grounded in informed and accurate assessments of their benefits, limitations, and safeguards.

Interventions to strengthen trust and acceptance can focus on enhancing the adequacy of regulation and investing in initiatives to mitigate negative outcomes from AI use, designing and deploying AI systems to maximize beneficial outcomes and reduce risks (e.g. privacy by design), strengthening organizational assurances and governance of trustworthy use, and systematically improving AI literacy, through public and employee AI education programs, for example.

Our findings further suggest the high trust and acceptance levels in emerging economies are not based on blind optimism: people in these economies perceive and experience negative outcomes of AI in a similar way to those in advanced economies. Rather, they experience augmented benefits, which offset these risks. However, it is important to guard against overconfidence and complacency that can stem from high trust by encouraging critical engagement, for example.

While there is a distinct pattern between advanced and emerging economies, it is important to recognize that countries within these broad categories vary substantially in their economic, cultural, political, and historical contexts, and there are country exceptions that don't fall neatly into these patterns.

## There is a public mandate for AI regulation with the current regulatory landscape falling short of expectations: implications for policymakers

The 47 countries surveyed represent a variety of approaches and stages in AI regulation and governance.

At the time of data collection, countries such as Singapore and China stood out for the breadth of regulatory and governance measures that had been implemented. Other jurisdictions, such as the European Union and Korea, had designed comprehensive AI laws and regulatory frameworks and were in the process of implementation. Countries such as Australia, India, and Canada were debating proposed AI-specific legislative frameworks. Similarly, a range of countries—including emerging economies such as Saudi Arabia, Türkiye, and the UAE—had implemented or proposed AI guidelines without adopting comprehensive legislation. The UK and the USA (including individual US states) had launched multiple initiatives but lacked a unified regulatory approach. Notably, after data collection, the US Government scaled back its approach to AI regulation, and while 58 countries signed the Paris AI Action Summit agreement, the USA and UK did not.[57]

In the context of this lack of a globally consistent regulatory approach, our findings provide important insights and evidence on public expectations surrounding the regulatory landscape for AI.

They reveal a clear public mandate for robust, fit-for-purpose AI regulation underpinned by globally shared concerns surrounding the societal risks and negative outcomes from AI, and low public trust in the safety and security of AI use.

The majority of people in all countries expect a multipronged regulatory approach, supporting both international and national laws and regulation, and expecting government and existing regulators to play a leading role. They also expect industry to be involved, working together with government and regulatory bodies through co-regulation, and aligning organizational governance.

The near universal endorsement and preference for international-level laws and regulation indicates public recognition that AI is not bound by national borders and is often developed by multinational companies who operate cross-border, which can constrain the ability of a national government or regulatory body to develop and enforce regulation. International standards (e.g. from the International Standards Organization [ISO]) can provide governments and industry with interoperable frameworks for regulation and governance.

In contrast to these expectations, the majority view the current regulatory landscape as inadequate and falling short in making AI use safe.

This gap between public expectations and the current regulatory landscape likely reflects the early stage of regulatory design and implementation in many jurisdictions. It may also partly reflect low public awareness of existing applicable laws in countries where these exist.

To consider and remedy this gap, policymakers need to not only design, implement and enforce appropriate AI regulation, but also to educate and raise public awareness of these laws. This includes clarifying and raising awareness of how existing laws (e.g. privacy and consumer laws) apply to AI in countries where these are in place, and the rights and responsibilities that each individual has, as well as the responsibilities of organizations and governments to manage and enforce the laws.[58] For example, some people may not know that under the EU AI Act they have a right to know when they are interacting with certain AI applications (e.g. chatbots).

When people believe there are adequate regulatory safeguards, they are considerably more likely to trust and accept the use of AI, underscoring the importance of having an effective regulatory framework in place and ensuring it is communicated widely to those that are governed by it. A clear and effective regulatory framework and coordinated international responses provides industry with certainty and supports sustained safe use and adoption, as well as interoperability across countries.

Our findings reinforce that AI-generated misinformation is a key concern globally[59] and is undermining trust in online content and raising concerns about the integrity of elections. There is strong public support for legislative measures to combat AI-generated misinformation, with the public also expecting media and social media companies to implement stronger fact-checking and techniques to enable the detection of AI-generated content (e.g. watermarking). These expectations stand in contrast with moves by some social media companies to reduce fact-checking on their platforms.[60]

Combatting misinformation and supporting the public's ability to detect content generated and spread by AI bots is critical to supporting well-functioning democratic processes and societal cohesion. The widespread adoption of increasingly sophisticated generative AI tools is likely to make fake content easier to produce and disseminate, yet harder to detect.

## The age of working with AI is here: implications for organizational leaders and employees

Our findings indicate that the age of working with AI is here, with high rates of self-reported employee and organizational adoption particularly in emerging economies, and a preference for human-AI collaboration in managerial decision making.

The use of AI at work is delivering clear performance-related benefits ranging from productivity gains, better resource utilization, greater access to information, enhanced innovation and knowledge sharing, and increased revenue-generation opportunities. These benefits are indicators of the return on investment that can be realized from adopting AI technology.

However, our research indicates that these benefits are not guaranteed and are often accompanied by a concerning pattern of complacent, inappropriate, and non-transparent use of AI by employees, which augment material and reputational risks for organizations, leaders, and employees alike. Compounding this complacent use is lagging organizational governance and support for responsible AI use.[61] For example, while most employees are using public generative AI tools, many organizations do not provide any policy to guide their use, despite the risks these public tools pose for privacy and data leakage, loss of IP, and cybersecurity concerns. Even when policies are in place, a worrying number of employees say they are using these tools in ways that contravene policies and rules, put company and customer data at risk, and raise quality issues. The invisible nature of much of employees' individual AI work practices limits the ability to understand and harness the benefits and manage the risks.

While many organizations are still at an early stage of their journey with AI[62], these findings suggest a significant gap between employee individual adoption and organizational awareness and preparedness. There is an urgent imperative to close this gap.

### Key considerations for policymakers and regulators

- Analyze gaps in current regulation and laws.
- Accelerate the development and implementation of effective and enforceable AI regulation at the national and international level.
- Collaborate with trusted technical experts to ensure regulation is effective and enforceable.
- Support international coordination and cooperation to ensure consistent global standards, interoperability, and mitigation of AI risks.
- Communicate and raise public awareness of legal rights, protections and responsibilities that relate to common applications of AI.
- Invest in public AI training and education to support AI literacy and responsible use.
- Invest in methods to combat mis- and disinformation.

### Key actions for media and social media companies

- Invest in fact-checking and other mechanisms to combat mis- and disinformation.
- Develop and use tools that enable and support users to identify AI-generated content.

Our research suggests that organizations can encourage AI adoption, while simultaneously promoting critical engagement with AI tools to combat complacent use, by cultivating an AI strategy and culture, implementing responsible AI governance mechanisms, and supporting employee AI training, literacy and understanding of AI capabilities, limitations and standards of responsible use. Each element is critical: the benefits of AI adoption and integration are more likely to be realized when organizations have each of these strategic, cultural, governance and training mechanisms in place.

There are many resources to help organizations support the development and implementation of robust AI governance systems, including several ISO AI Standards.[63] By simultaneously encouraging experimentation and mandating responsible oversight, organizations can foster a sustainable ecosystem of innovation and performance benefits without sacrificing the reflection and scrutiny that is critical for responsible use.

Transparency and accountability are critical to combat inappropriate use. This requires clear guidance, policy, training, and oversight, and also a psychologically safe environment where employees feel comfortable to openly share how and when they are using AI tools in their work. This psychological safety not only enables better oversight and risk management but can also support a culture of shared learning, experimentation, continuous improvement, and the responsible diffusion of innovation across the organization (e.g. through communities of practice), helping to realize more of the performance benefits offered by AI technologies. Achieving this requires investment in structures and strategies to meaningfully engage with, listen to, and have honest conversations with employees about AI use and deployment.[64]

Our findings further reinforce that high levels of trust and use of AI are not simply end goals. Rather, employees can be supported to develop appropriate levels of trust based on an informed understanding of the capabilities, limitations and risks of the AI system, and its appropriateness to the task at hand. Fully integrating training and guidance on responsible AI practices into everyday workflows—including onboarding processes, project work, and performance reviews—can help set healthy workplace norms around responsible AI use and support employees to develop well-calibrated trust.

Most employees surveyed want to learn more about AI, which can serve as a springboard to upskilling. Our research also suggests employees with low levels of AI literacy—such as older employees and those with lower incomes and no university education—may be at risk of experiencing what has been termed the 'AI divide': being left behind due to a lack of access or ability to use AI and benefit from the opportunities it offers.

AI adoption in the workplace is also having mixed impacts on human collaboration, stress and workload, employee surveillance, deskilling, and job security. Proactive management is required to help ensure that AI integration enhances rather than undermines trust, wellbeing, and skill development at work. For example, through work design that incorporates human–AI collaboration while preserving human relationships, strategic workforce planning and reskilling to support job security, and the ongoing development of human capabilities to mitigate deskilling and overreliance.

A critical way organizations can help to strengthen stakeholder trust is by designing and using AI in ways that create demonstrable benefits and value for stakeholders, as well as by investing in assurance mechanisms that support and signal trustworthy use. The research indicates that people are more willing to trust AI systems when assurance mechanisms are in place, such as meaningful human oversight and accountability that enables over-riding or challenging AI recommendations, monitoring of system reliability, adhering to international AI standards, and independent third-party AI assurance.

To date, much of the governance of AI has focused on the integration of AI into services, products and operations, and ensuring the principles of trustworthy AI (such as those reflected in the assurance mechanisms), are put into practice.[65] The research highlights the need to complement this governance with greater attention to employee use of AI and the impacts on work. Specifically, they highlight a need for organizations to better govern *how employees are using AI tools and systems* in their everyday work to create greater accountability and transparency, and to proactively *manage and monitor the impacts of AI integration in the workplace*.

### Key actions for organizational leaders:

- Invest in AI literacy to enhance human-AI collaboration skills, critical engagement, responsible use and appropriate trust in AI.
- Establish governance frameworks that support oversight, accountability, transparency, and risk management.
- Embed responsible AI practices into operational routines and decision-making.
- Create psychologically safe environments that support transparent and accountable use.
- Create structures to meaningfully engage with, listen to, and have honest conversations with employees about AI use and deployment.
- Invest in strategic workforce planning and reskilling to prepare for job and work changes.
- Understand, manage, and monitor the impacts of AI use on employees and the workplace.
- Ensure trust is earned, not assumed, by demonstrating responsible organizational AI use.

### Key actions for managers:

- Model responsible AI use and set clear norms and guidelines on appropriate use.
- Encourage ongoing dialogue about AI use, including where it adds value, where it introduces risk, and what support is needed.
- Balance innovation with risk management by supporting safe experimentation while ensuring compliance with organizational policies.

### Key actions for employees:

- Be transparent about when and how AI tools are being used in work.
- Take initiative in developing AI literacy, particularly in understanding the strengths, limitations, and appropriate use cases for AI tools.
- Critically engage with AI tools and validate output when important for work.
- Stay informed about organizational policies on AI use and ensure they are followed.
- Support peers in responsible adoption by sharing learning, best practice, and raising concerns about inappropriate use.

## Educating for an AI-augmented future: Implications for education providers, students, and employers

The findings reveal that AI use among students is pervasive, frequent, and driven primarily by freely available general-purpose generative AI tools. Students are clearly benefiting from from increased efficiency, enhanced access to information, greater innovation, more personalized learning, and reduced workloads and stress. However, students also report mixed cognitive, social-relational, and fairness impacts, and widespread inappropriate or complacent use of AI.

The implications of these mixed impacts are profound. While AI helps content production and efficient completion of learning and assessment tasks, it may also weaken the development of critical thinking, interpersonal skills, and social dynamics such as collaboration and interaction—all of which are critical life skills. Without intervention and management, students—the workforce of the future—are likely to be tech-savvy with well-developed AI capabilities, yet potentially underprepared for work that requires collaboration, strong interpersonal skills, critical thinking and completion of work without AI assistance.

For education providers, these findings emphasize the need for robust and explicit AI governance frameworks, as well as educational programs that develop students' critical engagement with AI technologies. The findings suggest many educational providers are lagging behind in establishing clear guidance for their students, highlighting the need to proactively develop, integrate, and communicate AI policies and provide appropriate training to support responsible use and preserve the core educational outcomes essential to students' long-term success.

More broadly, the rise of AI is challenging conventional teaching models, suggesting a need for ongoing curriculum adaptation to ensure students are equipped with the skills to navigate an AI-augmented world, while continuing to develop their uniquely human capabilities. Educators must equip students for a workplace where AI is a ubiquitous tool, ensuring they develop both human-AI collaboration proficiency, together with the essential human skills that underpin leadership, innovation, collaboration, and ethical decision-making.

Simply banning AI use is not a viable option. Instead, teaching students how to question, verify, and critically engage with AI tools is a critical skillset for the future of work. Ultimately, the proliferation of student AI use leaves education providers little choice but to reimagine a new educational paradigm. This may require prioritizing collaborative assignments and in-person engagement to ensure interpersonal skill development and redesigning assessment methods towards more interactive, process-oriented evaluations (e.g. oral exams, in-class problem-solving tasks) and AI-assisted but human-verified work.Fostering a culture of academic integrity—where students see AI as an aid rather than a shortcut to developing their skills, knowledge and capabilities—will be equally crucial.

These insights may also have implications for the workplace. It will pose a significant challenge for employers if students—as the workforce of the future—bring with them engrained norms of inappropriate AI use and ways of working that are at odds with organizational responsibilities. This reinforces the need for AI education, literacy and critical engagement with AI technologies to start early and be core to educational programs.

**Key actions for education providers:**

- Develop and communicate robust governance frameworks for the responsible use of AI in learning and assessment.
- Develop curricula and pedagogy that integrate AI literacy, human-AI collaboration skills, and critical evaluation of AI systems balanced with the development of uniquely human capabilities such as collaboration, teamwork, problem solving, and ethical reasoning.
- Use assessment methods that preserve academic integrity and skill development.
- Collaborate with industry to ensure educational curricula prepares students for the future of work.

**Key actions for students:**

- Engage with AI tools ethically, transparently, and in accordance with institutional guidelines.
- Take initiative to learn how AI systems work, understand their limitations, and critically evaluate their outputs.
- View AI as a tool to support learning, not a shortcut: use it purposefully to develop skills, knowledge and capabilities.

Loss of human interaction due to AI is a significant societal concern. It is experienced by most people, including employees and students who report using AI rather than collaborating with others to complete work, raising the question of how human connectivity can be retained in AI-augmented workplaces, educational environments, and society at large. This particular challenge is less amenable to training, governance, or technical solutions. It leaves organizations to grapple with building and preserving meaningful connectivity, purpose, and belonging amidst increasingly virtual work and service delivery environments and a drive toward enhancing efficiency through AI-empowered technological solutions. Deliberate strategies

to maintain human connections will become increasingly essential, not only for attraction and retention of employees, but also for fostering a culture of collaboration and shared responsibility that underpins meaningful work, sustained performance, and broader societal wellbeing. There is no easy fix: addressing these challenges demands sustained organizational commitment and intentional strategies to balance technological efficiency with human-centric practices.

Education providers and employers have a shared interest in ensuring people use AI effectively, responsibly, and in ways that enhance human potential and have positive societal outcomes. Education providers can lay the foundation by socializing students in responsible use and critical evaluation of when, where and how to appropriately use it. Organizations can reinforce and build upon this understanding through workplace practices, norms, governance, training and professional development. A cross-sectoral approach—rooted in shared responsibility and mutual learning among students, education providers, leaders, and employees—is important to ensure the next generation enters the workforce not only AI-capable, but also AI-wise.

## Re-imagining the AI-enabled society: stewarding the responsible integration of AI requires a shared commitment

The public's shared concerns about AI stem broadly from three sources: AI malfunctions (e.g. bias, inaccurate outcomes, system failure), malicious or misleading use (e.g. misinformation and disinformation, manipulation or harmful use, cybersecurity risks), and inappropriate, reckless or overuse (e.g. deskilling and dependency, loss of human interaction, loss of privacy or IP).[66]

Addressing and mitigating these root causes requires a range of technical, social, organizational, regulatory, and individual actions, highlighting the need for a coordinated approach at multiple levels. While our survey suggests the negative outcomes from AI are experienced less than the benefits, there is an argument that even the lowest experienced negative outcomes (i.e. bias and unfair treatment; experienced by a third) is unacceptable, and there is a moral obligation to do better.

These negative outcomes are being experienced or observed by a significant proportion of people across each of the 47 countries, indicating that these are no longer 'potential' risks: rather they are realized impacts. These negative impacts are of universal concern across the countries surveyed, and there is broad support for international cooperation and efforts to address them.

The tension between the undeniable positive benefits from AI and the realized negative impacts raises questions about the kind of society and organizations we want to achieve with AI. Our survey shows that we are reaping the rewards of efficiency, effectiveness, innovation, and resource savings, but are also experiencing loss of human connection, privacy, mis- and disinformation, deskilling and dependency. We do not yet fully understand the long-term impacts, underscoring the importance of considered choices at every level about how AI is integrated into society and work.

We hope this research will support individuals and organizations to make choices that practically resolve this tension in favor of AI's benefits and inform a clearer vision of how an AI-enabled society can meet the needs and expectations of the public and support people and communities to thrive.

# Appendix 1: Methodological and statistical notes

In this section, we explain the research methodology and statistical approach

## Survey piloting, translations and procedure

The research was approved by and adhered to the Guidelines of the ethical review process of The University of Queensland and the National Statement on Ethical Conduct in Human Research.

The survey was divided into five sections with questions in each section focused on the respondent's: a) demographic details; b) understanding of AI; c) use and attitudes toward AI systems (including trust, acceptance, risks, benefits, impacts and emotions); d) attitudes toward AI regulation, governance and management; e) attitudes, use and impacts of AI at work (only completed by those working) or in education (only completed by those studying). At the end of the survey, respondents were asked a series of open-ended questions.

After completing the first section on use and understanding of AI, participants read the definition of AI adapted from the OECD (see page 16), followed by a description of common ways AI is used to ensure understanding: "*AI is used in a range of applications that do things such as generate text, images, and videos, predict what customers will buy, identify credit card fraud, identify people from their photos, help diagnose disease, and enable self-driving cars*."

Questions in sections c and d of the survey referred to one of three specific AI applications or referred to 'AI systems in general'. Respondents were randomly allocated to one of these AI applications, providing equivalent numbers of responses across each. Before answering these questions, respondents read a brief description of the AI application, including what it is used for, what it does and how it works (see full descriptions on page 16). The research team developed these descriptions based on a range of in-use systems with input from domain experts working in healthcare, Human Resources, and generative AI.

The survey was extensively piloted and refined before launch to ensure clarity and construct validity and reliability.[67] To ensure survey equivalence across countries, we conducted translation and back-translation of the English version of the survey into the native language(s) dominant in each country, using separate professional translators. Respondents could also opt to complete the survey in English if preferred.

To enhance the rigor and quality of the research, we applied established techniques to filter out inattentive survey responses.[68] Individuals with rapid completion times suggestive of insufficient engagement were removed. We included attention checks at two points in the survey. Respondents were excluded if they failed these checks or failed one while also exhibiting straight-lining behaviors (e.g. consistently selecting the same response across multiple survey items), nonsensical open-ended responses, or implausible answers across related question sets.

## Survey measures

Where possible, we used or adapted existing validated measures from academic research (e.g. Haesvoets et al., 2021; Harmon-Jones et al., 2016; McKnight et al., 2002, 2011; Lee & Park, 2023; Wang et al., 2023; Zhang & Moffat, 2015) or from previous public attitude surveys (e.g. Ipsos, 2017; Zhang & Dafoe, 2019).

*Trust* in each specific AI application was measured using a reliable 7-item scale adapted from Gillespie (2012) and validated in our prior surveys. Example items are: "How willing are you to… Rely on information or content provided by an AI system" (willingness to rely); "Share relevant information about yourself to enable an AI system to perform a service or task for you" (willingness to share information); "Trust AI systems" (direct trust). *Perceived trustworthiness* was measured using a 9-item measure assessing positive expectations toward the AI system, adapted from McKnight et al. (2002). Example items include "I believe most AI applications: Produce output that is accurate" (ability); "Are safe and secure to use" (safe and ethical use).

AI literacy was assessed using two indicators. *AI knowledge* was measured with four items adapted from Ipsos (2017) that assessed people's belief that they feel informed about how AI is used, understand when AI is being used, feel they know about AI, and feel they have the skills and knowledge to use AI appropriately. AI efficacy was assessed with a 6-item measure adapted from validated subjective AI literacy scales (Lee & Park, 2023; Wang et al., 2023). Three items relate to the ability to use AI effectively (e.g. "I can… Skillfully use AI applications or products to help me with my daily work or activities") and three to the ability to use AI responsibly (e.g. "Identify potential ethical issues associated with the use of AI applications"). This was supplemented with an objective measure of people's knowledge of AI use in common applications by asking respondents whether three common AI applications (social media, virtual assistants, and facial recognition) use AI (yes, no or don't know).

*Income* was measured with a simplified version of the income question used by the World Values Survey (WVS; see Haerpfer et al., 2022). Specifically, we asked: "Please indicate which income group best describes your household income (counting all wages, salaries, pensions and other income sources)." Responses were provided on a 1-10 scale, where 1 = Lowest income group, 5 = Middle income group, and 10 = Highest income group. There was also a 'Prefer not to say' option.

Most survey measures used either a 5 or 7-point Likert scale (e.g., ranging from strongly disagree (1) to strongly agree (7)). The psychometric properties of all multi-item constructs were assessed to examine reliability and dimensionality. Each measure met the criteria for reliability, with Cronbach alphas ranging from .81 (critical engagement with AI) to .96 (organizational support for responsible AI).

## Data analysis, statistical testing and reporting

For ease of interpretation, percentages are reported in most places rather than means. When percentages did not add up to 100 percent due to rounding, we distributed the remaining value based on decreasing order of the values' decimal part, as per the Largest Remainder Method.

Some survey response scales provided a 'don't know' option. When 5 percent or more of respondents selected this option, we include it in the reporting of percentages. When less than 5 percent, we remove these responses for ease of interpretation and recalculate percentages based on the remainder of the data.

Correlational analyses and structural equation modeling were conducted to examine associations between concepts. All correlations reported in-text are significant at $p<.001$. Reported relationships are based on theoretical or hypothesized relationships. Given the data is cross-sectional and self-reported, causality between concepts cannot and should not be inferred.

Our reporting of between-country, between-application, between-people and within-person differences was based on statistical testing and adhered to well established benchmarks for interpreting between- and within-subject effect sizes (see Cohen, 1988; Lakens, 2013).

We used one-way analysis of variance (ANOVA) to examine differences between countries, AI applications and people (e.g. age category differences). We took several steps to ensure the responsible reporting of only meaningful differences in the data. First, we adopted a stringent cut-off of $p<.001$ to interpret statistical significance. Where there were statistically significant differences between groups, we examined the partial eta-squared effect size to determine the magnitude of differences between the groups. Given the large sample size, trivial effects can reach statistical significance; thus, we report only those findings with effect sizes of .03 or greater to focus on relationships that are substantively meaningful. This threshold ensures that reported findings reflect meaningful differences.[69]

We performed paired-sample t-tests to examine within-person differences (for instance, the variability in perceptions of the technical ability of AI systems and their safe and ethical use). We used a measure of effect size to determine the magnitude of statistically significant effects. Specifically, we used Hedges' g with a cut-off of .30 to indicate a robust and practically meaningful difference.[70]

Changes over time in the 17 countries surveyed in both 2022 and 2024 are based on survey questions asked about three common AI use applications: AI in general, Healthcare AI, and Human Resources AI. As such, comparative data presented is based only on the three AI applications. Questions about generative AI were only asked in 2024. Additionally, some measures were modified between 2022 and 2024, with items added or removed. For these measures, composite values were recalculated using only items that remained the same or were substantively similar across both surveys.[71]

Because the samples at each time point are independent rather than longitudinal, changes over time should be interpreted as indicative of broad trends. We report statistically significant differences ($p<.001$) in Appendix 4 and illustrate the largest changes in the main text. While we use stringent effect size thresholds (e.g. $n^2 \geq .03$) in cross-sectional analyses to ensure that only substantively large differences are highlighted, in repeated cross-sectional studies even small but statistically significant changes can signal consistent and informative population-level trends.

# Appendix 2: Country samples

## Overall and country demographic profiles

The demographic profile of each country sample was nationally representative of the population on age, gender and regional location, within a 5 percent margin of error, based on official national statistics within each country. The few exceptions are noted below.

Across countries, the gender balance was 51 percent women, 49 percent men and <1 percent other genders, with Costa Rica, Latvia, and Portugal having the highest representation of women (54%) and UAE the lowest (32%).

The mean age across countries was 46 years and ranged from 35 years (Costa Rica and Saudi Arabia) to 53 years (Japan). There was difficulty in reaching over-65-year-olds in eight countries: China (over 65s expected: 17%, achieved: 10%), Egypt (expected: 9%, achieved: 5%), Greece (expected: 27%, achieved: 16%), Israel (expected: 18%, achieved: 11%), Lithuania (expected: 25%, achieved: 14%), Portugal (expected: 27%, achieved: 17%), Slovenia (expected: 27%, achieved: 11%), and Türkiye (expected: 13%, achieved: 7%). Respondents from China, Egypt, and Nigeria also tended to be more urban than the general population. We were unable to source reliable location data for the UAE and Slovenia. Data collected in Israel did not include the West Bank settlement and data collected in China was contained to mainland China.

Country samples represented the full diversity of education levels. While levels of university education broadly matched the respective populations in most advanced economies, country samples tended to overrepresent university-educated people in emerging economies relative to their respective general populations (using OECD 2024 education data as a comparison[72]). It is common for online survey respondents in countries with emerging economies to be better educated, as well as more urban, younger, and affluent, than those in the general population in those countries.[73]

Given non-representativeness related to age and education in some of our country samples, we performed additional robustness checks to ensure differences reported across countries and economies are not merely artifacts of differences in age or education. We examined differences between emerging and advanced economies—and countries—on key indicators when controlling for the effects of education and age, using multivariate analysis of covariance (MANCOVA) tests. The pattern of results did not change; when we report economy and country differences, these remain significant and meaningful when controlling for education and age. These analyses indicate that the observed differences across countries and economies are not simply due to demographic differences in age or education across country samples.

## Employee demographic profile

Sixty-seven percent of the total sample were employed (52% full-time; 15% part-time), yielding 32,352 respondents answering questions about AI use at work. The proportion of employees ranged from 50 percent (Belgium, Finland) to 89 percent (UAE). Among workers, 53 percent were male and 47 percent female, with a mean age of 41 (range = 18-95). Most were employed by an organization (77%), followed by self-employment (16%) and business ownership (7%). Respondents worked across diverse industries (e.g. power and utilities = 2%, manufacturing = 11%) and occupations (e.g. service and sales = 10%, professional and skilled = 32%).

## Student demographic profile

Students comprised 5% of the sample (n = 2,499), with 56 percent female and 44 percent male. The mean age was 23 (range = 18-86), with 65% enrolled in university, 18% in secondary education, 16% in vocational, trade, or technical programs, and 1% in other forms of education. Student respondents were present in all countries (range = 28 [Switzerland] to 115 [Nigeria]). Country-level and economic group analyses were not conducted, due to the small subsample sizes.

## Table A2-1: The demographic profile for each country sample

| COUNTRY | % GENDER | | | AGE (YRS) | % AGE CATEGORY | | | | % EDUCATION | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | W | M | O | Mean | 18-24 | 25-44 | 45-64 | 65+ | <SS | SS | Qu | UG | PG |
| ARGENTINA | 51 | 49 | <1 | 43 | 17 | 41 | 28 | 14 | 4 | 33 | 25 | 34 | 4 |
| AUSTRALIA | 51 | 49 | <1 | 50 | 9 | 35 | 32 | 24 | 9 | 19 | 28 | 32 | 12 |
| AUSTRIA | 51 | 49 | 0 | 48 | 11 | 32 | 35 | 22 | 7 | 29 | 35 | 17 | 12 |
| BELGIUM | 50 | 50 | 0 | 49 | 12 | 32 | 32 | 24 | 10 | 29 | 14 | 32 | 15 |
| BRAZIL | 53 | 47 | 0 | 41 | 17 | 45 | 28 | 10 | 7 | 29 | 16 | 25 | 23 |
| CANADA | 51 | 49 | <1 | 50 | 10 | 34 | 33 | 23 | 4 | 24 | 25 | 34 | 13 |
| CHILE | 51 | 49 | <1 | 44 | 14 | 39 | 31 | 16 | 1 | 20 | 36 | 36 | 7 |
| CHINA | 51 | 49 | 0* | 42 | 14 | 42 | 34 | 10 | 1 | 10 | 13 | 70 | 6 |
| COLOMBIA | 52 | 48 | <1 | 43 | 18 | 39 | 29 | 14 | 5 | 19 | 32 | 35 | 9 |
| COSTA RICA | 54 | 46 | <1 | 35 | 20 | 62 | 17 | 1 | 8 | 23 | 19 | 37 | 13 |
| CZECH REPUBLIC | 53 | 47 | <1 | 49 | 7 | 34 | 36 | 23 | 5 | 50 | 12 | 12 | 21 |
| DENMARK | 51 | 49 | <1 | 50 | 12 | 30 | 32 | 26 | 12 | 11 | 32 | 34 | 11 |
| EGYPT | 48 | 52 | 0* | 37 | 22 | 47 | 26 | 5 | 2 | 9 | 7 | 71 | 11 |
| ESTONIA | 52 | 48 | <1 | 47 | 10 | 36 | 32 | 22 | 6 | 24 | 23 | 29 | 18 |
| FINLAND | 51 | 49 | <1 | 50 | 9 | 32 | 32 | 27 | 11 | 12 | 42 | 21 | 14 |
| FRANCE | 53 | 47 | <1 | 51 | 10 | 29 | 34 | 27 | 9 | 24 | 20 | 28 | 19 |
| GERMANY | 52 | 48 | 0 | 52 | 7 | 30 | 36 | 27 | 4 | 24 | 41 | 14 | 17 |
| GREECE | 51 | 49 | <1 | 46 | 9 | 35 | 40 | 16 | 4 | 22 | 21 | 31 | 22 |
| HUNGARY | 53 | 47 | 0 | 49 | 8 | 33 | 33 | 26 | 13 | 36 | 20 | 25 | 6 |
| INDIA | 49 | 51 | 0 | 38 | 22 | 46 | 24 | 8 | 1 | 7 | 5 | 47 | 40 |
| IRELAND | 53 | 47 | <1 | 46 | 13 | 37 | 32 | 18 | 5 | 20 | 22 | 36 | 17 |
| ISRAEL | 50 | 50 | <1 | 42 | 17 | 41 | 31 | 11 | 7 | 19 | 23 | 33 | 18 |
| ITALY | 52 | 48 | <1 | 50 | 10 | 29 | 35 | 26 | 8 | 28 | 25 | 30 | 9 |
| JAPAN | 51 | 49 | <1 | 53 | 8 | 26 | 33 | 33 | 2 | 29 | 12 | 52 | 5 |
| KOREA | 49 | 51 | <1 | 48 | 10 | 32 | 38 | 20 | 1 | 22 | 4 | 65 | 8 |
| LATVIA | 54 | 46 | <1 | 48 | 9 | 32 | 35 | 24 | 6 | 29 | 24 | 32 | 9 |
| LITHUANIA | 53 | 47 | <1 | 43 | 15 | 39 | 32 | 14 | 3 | 16 | 21 | 39 | 21 |
| MEXICO | 52 | 48 | <1 | 41 | 17 | 43 | 30 | 10 | 2 | 14 | 27 | 50 | 7 |
| NETHERLANDS | 51 | 49 | <1 | 50 | 10 | 30 | 34 | 26 | 2 | 35 | 24 | 29 | 10 |
| NEW ZEALAND | 50 | 50 | <1 | 48 | 11 | 36 | 35 | 18 | 10 | 20 | 27 | 33 | 10 |
| NIGERIA | 51 | 49 | 0* | 38 | 25 | 38 | 31 | 6 | 2 | 13 | 7 | 58 | 20 |
| NORWAY | 49 | 51 | <1 | 48 | 11 | 34 | 32 | 23 | 5 | 17 | 17 | 45 | 16 |
| POLAND | 52 | 48 | <1 | 47 | 10 | 39 | 30 | 21 | 8 | 29 | 18 | 12 | 33 |
| PORTUGAL | 54 | 46 | <1 | 46 | 10 | 35 | 38 | 17 | 6 | 34 | 10 | 36 | 14 |
| ROMANIA | 52 | 48 | <1 | 47 | 9 | 34 | 34 | 23 | 4 | 24 | 16 | 43 | 13 |
| SAUDI ARABIA | 43 | 57 | 0* | 35 | 17 | 62 | 20 | 1 | 3 | 16 | 7 | 63 | 11 |
| SINGAPORE | 51 | 49 | <1 | 46 | 12 | 35 | 36 | 17 | 1 | 17 | 24 | 47 | 11 |
| SLOVAK REPUBLIC | 52 | 48 | <1 | 47 | 10 | 37 | 33 | 20 | 5 | 36 | 23 | 21 | 15 |
| SLOVENIA | 50 | 50 | <1 | 43 | 12 | 41 | 36 | 11 | 3 | 37 | 10 | 42 | 8 |
| SOUTH AFRICA | 51 | 49 | <1 | 38 | 23 | 45 | 24 | 8 | 4 | 32 | 18 | 40 | 6 |
| SPAIN | 51 | 49 | 0 | 49 | 9 | 31 | 36 | 24 | 5 | 23 | 22 | 38 | 12 |
| SWEDEN | 50 | 50 | <1 | 50 | 9 | 34 | 32 | 25 | 9 | 39 | 13 | 33 | 6 |
| SWITZERLAND | 51 | 49 | <1 | 49 | 8 | 37 | 34 | 21 | 3 | 11 | 43 | 28 | 15 |
| TÜRKIYE | 49 | 51 | <1 | 39 | 17 | 46 | 30 | 7 | 5 | 25 | 6 | 55 | 9 |
| UAE | 32 | 68 | 0* | 35 | 12 | 71 | 16 | 1 | 2 | 10 | 6 | 59 | 23 |
| UK | 51 | 49 | <1 | 49 | 9 | 35 | 33 | 23 | 3 | 25 | 22 | 33 | 17 |
| USA | 50 | 49 | <1 | 50 | 13 | 31 | 33 | 23 | 9 | 22 | 13 | 34 | 22 |

Gender: W = Women, M = Men, O = Other reported genders; Education: <SS = Lower secondary school or less, SS = Upper secondary school, Qual = Vocational or trade qualification, UG = Undergraduate degree, PG = Postgraduate degree; * indicates that other gender and non-binary options were not provided in these countries due to cultural sensitivities.

# Appendix 3: Key indicators for each country

| COUNTRY | TRUST | TWTHY | ACCEPT | BENEFITS | RISKS | BENEFIT-RISK | CURRENT SAFEGUARDS | AI KNOWLEDGE | AI EFFICACY | AI TRAINING/ EDUCATION |
|---|---|---|---|---|---|---|---|---|---|---|
| ARGENTINA | 4.1/7 | 4.7/7 | 3.2/5 | 3.9/5 | 3.7/5 | 4.2/7 | 3.9/7 | 2.8/5 | 5.3/7 | 49% |
| AUSTRALIA | 3.6 | 4.2 | 2.5 | 2.9 | 3.5 | 3.6 | 3.4 | 2.3 | 4.2 | 24% |
| AUSTRIA | 3.9 | 4.4 | 2.9 | 3.2 | 3.3 | 3.8 | 4.0 | 2.5 | 4.2 | 29% |
| BELGIUM | 3.7 | 4.4 | 2.7 | 3.3 | 3.5 | 3.8 | 3.7 | 2.4 | 4.1 | 24% |
| BRAZIL | 4.4 | 5.1 | 3.5 | 3.9 | 3.4 | 4.3 | 4.4 | 3.1 | 5.4 | 47% |
| CANADA | 3.6 | 4.3 | 2.6 | 3.1 | 3.5 | 3.6 | 3.3 | 2.3 | 4.1 | 24% |
| CHILE | 4.0 | 4.8 | 3.2 | 3.9 | 3.7 | 4.3 | 4.0 | 2.7 | 5.3 | 43% |
| CHINA | 5.0 | 5.4 | 3.8 | 3.7 | 3.1 | 5.1 | 5.2 | 3.1 | 5.3 | 64% |
| COLOMBIA | 4.0 | 4.7 | 3.2 | 3.9 | 3.8 | 4.1 | 4.0 | 2.7 | 5.2 | 53% |
| COSTA RICA | 4.4 | 5.0 | 3.5 | 3.9 | 3.6 | 4.4 | 4.4 | 3.0 | 5.4 | 58% |
| CZECH REPUBLIC | 3.6 | 4.4 | 2.8 | 3.4 | 3.3 | 3.9 | 3.9 | 2.2 | 4.0 | 21% |
| DENMARK | 3.8 | 4.4 | 3 | 3.3 | 3.5 | 4.0 | 3.7 | 2.5 | 4.1 | 34% |
| EGYPT | 4.9 | 5.4 | 3.7 | 3.9 | 3.2 | 4.8 | 5.1 | 3.2 | 5.5 | 70% |
| ESTONIA | 4.0 | 4.6 | 3.2 | 3.4 | 3.3 | 4.1 | 4.3 | 2.8 | 4.5 | 46% |
| FINLAND | 3.2 | 4.1 | 2.7 | 2.8 | 3.4 | 3.8 | 3.3 | 2.2 | 3.9 | 31% |
| FRANCE | 3.5 | 4.3 | 2.7 | 3.4 | 4.0 | 3.7 | 3.5 | 2.3 | 4.2 | 24% |
| GERMANY | 3.5 | 4.3 | 2.9 | 3.3 | 3.4 | 3.9 | 3.7 | 2.4 | 4.0 | 20% |
| GREECE | 4.1 | 4.5 | 3.0 | 3.5 | 3.6 | 3.9 | 3.8 | 2.5 | 4.8 | 36% |
| HUNGARY | 4.1 | 4.5 | 3.0 | 3.4 | 3.3 | 4.0 | 4.0 | 2.2 | 4.4 | 19% |
| INDIA | 5.2 | 5.6 | 3.8 | 4.0 | 3.4 | 4.6 | 5.3 | 3.5 | 5.5 | 64% |
| IRELAND | 3.7 | 4.3 | 2.7 | 3.1 | 3.6 | 3.7 | 3.4 | 2.3 | 4.3 | 32% |
| ISRAEL | 4.1 | 4.4 | 3.2 | 3.6 | 3.5 | 4.1 | 3.8 | 2.7 | 4.6 | 42% |
| ITALY | 3.9 | 4.6 | 3.0 | 3.7 | 3.6 | 4.1 | 4.1 | 2.7 | 4.8 | 34% |
| JAPAN | 3.5 | 4.4 | 2.8 | 3.1 | 3.1 | 4.0 | 3.5 | 2.0 | 4.1 | 21% |
| LATVIA | 4.3 | 4.7 | 3.2 | 3.4 | 3.3 | 4.3 | 4.5 | 2.9 | 4.6 | 39% |
| LITHUANIA | 3.7 | 4.6 | 3.2 | 3.5 | 3.3 | 4.3 | 4.3 | 2.5 | 4.4 | 50% |
| MEXICO | 4.2 | 4.9 | 3.3 | 3.9 | 3.7 | 4.2 | 4.2 | 2.9 | 5.3 | 46% |
| NETHERLANDS | 3.6 | 4.2 | 3.0 | 3.3 | 3.5 | 3.5 | 3.7 | 2.5 | 3.9 | 24% |
| NEW ZEALAND | 3.6 | 4.2 | 2.5 | 2.9 | 3.4 | 3.7 | 3.2 | 2.3 | 4.2 | 24% |
| NIGERIA | 5.3 | 5.7 | 3.9 | 4.1 | 3.2 | 5.3 | 5.2 | 3.2 | 5.4 | 71% |
| NORWAY | 4.4 | 4.7 | 3.3 | 3.4 | 3.3 | 4.2 | 4.3 | 2.9 | 4.5 | 42% |
| POLAND | 3.8 | 4.5 | 3.1 | 3.6 | 3.5 | 4.2 | 4.1 | 2.8 | 4.5 | 29% |
| PORTUGAL | 3.7 | 4.5 | 2.9 | 3.7 | 3.7 | 3.9 | 3.7 | 2.5 | 5.1 | 33% |
| REP. KOREA | 4.1 | 4.6 | 3.1 | 3.6 | 3.5 | 4.4 | 4 | 2.7 | 4.2 | 36% |
| ROMANIA | 4.1 | 4.8 | 3.2 | 3.7 | 3.4 | 4.1 | 4.2 | 2.5 | 4.7 | 33% |
| SAUDI ARABIA | 4.6 | 5.3 | 3.5 | 3.8 | 3.3 | 4.7 | 5.1 | 3.1 | 5.3 | 60% |
| SINGAPORE | 4.3 | 4.8 | 3.1 | 3.4 | 3.5 | 4.3 | 4.5 | 2.6 | 4.7 | 45% |
| SLOVAK REPUBLIC | 3.8 | 4.4 | 2.9 | 3.4 | 3.3 | 4.1 | 4.0 | 2.3 | 4.2 | 25% |
| SLOVENIA | 3.8 | 4.5 | 3.0 | 3.3 | 3.4 | 4.0 | 3.9 | 2.5 | 4.5 | 43% |
| SOUTH AFRICA | 4.6 | 5.2 | 3.4 | 3.8 | 3.6 | 4.4 | 4.5 | 3 | 5.1 | 53% |
| SPAIN | 4.3 | 4.7 | 3.1 | 3.6 | 3.6 | 4.1 | 4.0 | 2.5 | 4.7 | 40% |
| SWEDEN | 3.7 | 4.2 | 2.8 | 3.2 | 3.5 | 3.6 | 3.3 | 2.4 | 3.9 | 24% |
| SWITZERLAND | 4.1 | 4.6 | 3.1 | 3.3 | 3.3 | 4.2 | 4.3 | 2.8 | 4.6 | 45% |
| TÜRKIYE | 4.4 | 5.3 | 3.4 | 3.8 | 3.4 | 4.4 | 4.3 | 2.9 | 4.9 | 34% |
| UAE | 4.8 | 5.3 | 3.5 | 3.8 | 3.3 | 4.6 | 5.1 | 3.2 | 5.4 | 60% |
| UK | 3.9 | 4.5 | 2.7 | 3.1 | 3.4 | 3.9 | 3.6 | 2.3 | 4.2 | 27% |
| USA | 3.8 | 4.4 | 2.7 | 3.1 | 3.4 | 3.7 | 3.4 | 2.5 | 4.4 | 28% |

Trust = Trust in AI system, Twthy = Perceived trustworthiness of AI system, Accept = Acceptance of AI system, Benefits = Perceived benefits of AI system, Risks = Perceived risks of AI system, Benefit-Risk = Perception that benefits of AI system outweigh the risks, Current Safeguards = Perceived adequacy of current laws and regulations governing AI, AI knowledge = Self-reported knowledge of AI, AI Efficacy = Self-reported ability to use AI effectively.

# Appendix 4: Changes in key indicators over time for 17 countries

| COUNTRY | RELIANCE | | TRUSTWORTHINESS | | WORRY | | RISKS | | RISK-BENEFIT CONCERN | | ADEQUACY OF SAFEGUARDS | | IMPORTANCE OF ASSURANCE | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2022 | 2024 | 2022 | 2024 | 2022 | 2024 | 2022 | 2024 | 2022 | 2024 | 2022 | 2024 | 2022 | 2024 |
| AUSTRALIA | 3.9 | 3.5 | 4.6 | 4.2 | 2.8 | 3 | 3.2 | 3.5 | 4 | 3.6 | 3.7 | 3.4 | 5.1 | 5.3 |
| BRAZIL | 5 | 4.4 | 5.4 | 5.1 | 2.6 | 3.2 | 3.4 | 3.5 | 5 | 4.4 | 4.4 | 4.4 | 5.9 | 5.6 |
| CANADA | 4 | 3.6 | 4.6 | 4.3 | 2.8 | 3.1 | 3.2 | 3.5 | 4.1 | 3.6 | 3.7 | 3.3 | 5.1 | 5.6 |
| CHINA | 5.3 | 4.9 | 5.7 | 5.4 | 2.6 | 2.4 | 3.2 | 3.1 | 5.4 | 5.2 | 5.4 | 5.2 | 5.6 | 5.8 |
| ESTONIA | 4.1 | 4 | 4.6 | 4.6 | 2.2 | 2.8 | 3.2 | 3.4 | 4.1 | 4.1 | 4 | 4.2 | 5.5 | 5.8 |
| FINLAND | 3.4 | 3.4 | 4.4 | 4.1 | 2.4 | 2.9 | 3.3 | 3.4 | 4.1 | 3.7 | 3.6 | 3.3 | 5.3 | 5.8 |
| FRANCE | 3.9 | 3.5 | 4.5 | 4.3 | 2.9 | 3 | 3.3 | 3.5 | 4.1 | 3.7 | 3.7 | 3.6 | 5 | 5.4 |
| GERMANY | 4.2 | 3.6 | 4.6 | 4.3 | 2.8 | 3.2 | 3.0 | 3.4 | 4.1 | 3.8 | 4.1 | 3.7 | 5.1 | 5.4 |
| INDIA | 5.4 | 5.2 | 5.8 | 5.6 | 2.6 | 2.8 | 3.2 | 3.5 | 5.2 | 4.6 | 5.5 | 5.3 | 5.8 | 6.1 |
| ISRAEL | 4.2 | 4 | 4.9 | 4.4 | 2.5 | 3 | 3.2 | 3.5 | 4.4 | 4.1 | 4 | 3.7 | 5.3 | 5.6 |
| JAPAN | 4 | 3.3 | 4.5 | 4.4 | 2.8 | 3.1 | 3.1 | 3.2 | 4.3 | 4 | 3.3 | 3.5 | 4.8 | 5 |
| KOREA | 4.1 | 4.1 | 4.7 | 4.6 | 2.8 | 3 | 3.5 | 3.5 | 4.4 | 4.4 | 3.4 | 4 | 5 | 5.4 |
| NETHERLANDS | 4 | 3.6 | 4.5 | 4.2 | 2.4 | 3 | 3.1 | 3.5 | 4 | 3.5 | 3.7 | 3.7 | 5.3 | 5.6 |
| SINGAPORE | 4.4 | 4.3 | 4.9 | 4.8 | 2.6 | 2.9 | 3.4 | 3.4 | 4.7 | 4.3 | 4.4 | 4.5 | 5.5 | 5.9 |
| SOUTH AFRICA | 4.7 | 4.6 | 5.3 | 5.1 | 2.6 | 2.9 | 3.6 | 3.7 | 4.8 | 4.4 | 4.3 | 4.4 | 5.8 | 6 |
| UK | 4.1 | 3.7 | 4.6 | 4.4 | 2.6 | 2.9 | 3.2 | 3.5 | 4 | 3.8 | 3.8 | 3.6 | 5.2 | 5.7 |
| USA | 4.2 | 3.9 | 4.7 | 4.4 | 2.6 | 3 | 3.3 | 3.4 | 4 | 3.7 | 3.7 | 3.5 | 5.1 | 5.5 |
| **OVERALL** | **4.3** | **4** | **4.8** | **4.6** | **2.6** | **3.0** | **3.3** | **3.4** | **4.4** | **4.1** | **4.0** | **4.0** | **5** | **5.6** |

Mean scores or percentages decreased from 2022 to 2024, p<.001

Mean scores or percentages increased from 2022 to 2024, p<.001

Cells with darker shading indicate +/- .4 mean difference or more or percentage increases of 10% or more

# Appendix 4 continued

| COUNTRY | ORGANIZATIONAL ADOPTION | | EMPLOYEE USE OF AI AT WORK | | TRUST IN AI AT WORK | | PERCEIVED ORG. SUPPORT | | AI KNOWLEDGE | | AWARENESS OF AI USE IN TECHNOLOGIES | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2022 | 2024 | 2022 | 2024 | 2022 | 2024 | 2022 | 2024 | 2022 | 2024 | 2022 | 2024 |
| AUSTRALIA | 23% | 65% | 36% | 59% | 4.1 | 4 | 4.3 | 4 | 2.4 | 2.3 | 34% | 33% |
| BRAZIL | 52% | 86% | 77% | 85% | 5.2 | 4.7 | 5.1 | 5.1 | 2.5 | 3 | 26% | 27% |
| CANADA | 20% | 62% | 34% | 58% | 4.1 | 3.9 | 4.2 | 4 | 2.3 | 2.3 | 35% | 33% |
| CHINA | 73% | 95% | 89% | 93% | 5.5 | 5.2 | 5.6 | 5.4 | 3.5 | 3.1 | 26% | 26% |
| ESTONIA | 29% | 69% | 53% | 69% | 4.3 | 4.2 | 4.4 | 4.1 | 2.1 | 2.8 | 34% | 36% |
| FINLAND | 38% | 70% | 56% | 57% | 3.9 | 3.6 | 4.6 | 3.8 | 2.6 | 2.3 | 23% | 34% |
| FRANCE | 21% | 63% | 40% | 57% | 4.1 | 4 | 4.1 | 3.7 | 2.2 | 2.3 | 39% | 42% |
| GERMANY | 25% | 63% | 41% | 50% | 4.2 | 4 | 4.4 | 3.8 | 2.5 | 2.5 | 40% | 41% |
| INDIA | 67% | 94% | 89% | 96% | 5.7 | 5.4 | 5.8 | 5.7 | 3.3 | 3.5 | 23% | 23% |
| ISRAEL | 28% | 63% | 51% | 60% | 4.6 | 4.4 | 4.5 | 4.1 | 2.7 | 2.6 | 38% | 44% |
| JAPAN | 21% | 58% | 49% | 51% | 4.2 | 3.6 | 3.4 | 3.6 | 2.1 | 2 | 36% | 47% |
| KOREA | 24% | 68% | 51% | 67% | 4.3 | 4.1 | 3.9 | 3.8 | 3.1 | 2.7 | 31% | 43% |
| NETHERLANDS | 21% | 60% | 31% | 49% | 4 | 4 | 4.2 | 3.7 | 2 | 2.4 | 46% | 46% |
| SINGAPORE | 43% | 79% | 67% | 77% | 4.7 | 4.6 | 4.8 | 4.8 | 2.8 | 2.6 | 22% | 29% |
| SOUTH AFRICA | 46% | 86% | 72% | 84% | 5.1 | 4.8 | 4.9 | 5 | 2.7 | 3 | 30% | 28% |
| UK | 20% | 64% | 37% | 60% | 4.1 | 4 | 4.1 | 4.1 | 2.2 | 2.3 | 36% | 35% |
| USA | 23% | 70% | 37% | 66% | 4.1 | 4.2 | 4.3 | 4.4 | 2.4 | 2.5 | 41% | 33% |
| **OVERALL** | **34%** | **71%** | **54%** | **67%** | **4.5** | **4.3** | **4.5** | **4.3** | **2.6** | **2.6** | **33%** | **35%** |

Mean scores or percentages decreased from 2022 to 2024, p<.001

Mean scores or percentages increased from 2022 to 2024, p<.001

Cells with darker shading indicate +/- .4 mean difference or more or percentage increases of 10% or more

# Endnotes

1 Samborska, V. (2024). Investment in generative AI has surged recently. Our World in Data. https://ourworldindata.org/data-insights/investment-in-generative-ai-has-surged-recently; Statista. (2025). Number of artificial intelligence (AI) tool users globally from 2020 to 2030. Statista. https://www.statista.com/forecasts/1449844/ai-tool-users-worldwide. Qiang, C., Liu, Y., & Wang, H. (2024). *Who on earth is using generative AI?* World Bank. https://blogs.worldbank.org/en/digital-development/who-on-earth-is-using-generative-ai-

2 Rooney, K. (2025, February 2025). OpenAI tops 400 million users despite DeepSeek's emergence. CNBC. https://www.cnbc.com/2025/02/20/openai-tops-400-million-users-despite-deepseeks-emergence.html; ChatGPT took approximately 2 months to achieve 100 million users, making it the fastest-growing consumer application in history. In comparison, it took Instagram over 2 years to reach 100 million users. https://www.reuters.com/technology/chatgpt-sets-record-fastest-growing-user-base-analyst-note-2023-02-01/

3 World Economic Forum (2025). Industries in the Intelligent Age White Paper Series. https://www.weforum.org/publications/industries-in-the-intelligent-age-white-paper-series/

4 See National Cancer Institute. Talaat, F. M., Kabeel, A., & Shaban, W. M. (2024). The role of utilizing artificial intelligence and renewable energy in reaching sustainable development goals. *Renewable Energy, 235*, 121311. https://doi.org/10.1016/j.renene.2024.121311. Center for Data Innovation. Evidence Shows Productivity Benefits of AI. https://datainnovation.org/2024/06/evidence-shows-productivity-benefits-of-ai/

5 Intentional use was differentiated from the passive use of AI (e.g. when AI operates behind the scenes in tools such as email filters and search engines). General-purpose generative AI tools were the most common class of AI intentionally used at work. We use the term as defined and explained in this report by the European Parliament.

6 We adopted the International Monetary Fund's (IMF) classification of advanced and emerging economies.

7 Robustly answering the question of which countries are leading AI adoption and use requires a different methodology to public attitude surveys. The conclusions here are based on the perceptions and experiences reported by a representative sampling of the public. They are not based on objective indicators of AI adoption, investment, or AI education and training.

8 To define global regions, we draw from the United Nations (2023). Standard Country or Area Codes for Statistical Use (49).

9 Survey responses were collected from individuals in mainland China only, excluding Hong Kong, Macau, and Taiwan.

10 We focused primarily on the 2023 *Government AI Readiness Index*. This index ranks and provides a total score for 193 countries on AI readiness across three pillars: Government (e.g. existence of a national AI strategy, cyber-security), Technology (e.g. number of AI unicorns, R&D spending), and Data and Infrastructure (e.g. telecommunications infrastructure, households with internet access). The countries selected had rankings at or near the top for their region on the 2023 Government AI Readiness Index. We supplemented this with data from the 2024 *Stanford AI Index*, which examines country-level private investment in AI and acceleration in AI activity over time to enable the identification of countries that are rapidly emerging in AI in regions that historically lacked AI capacity and investment (e.g. South Africa, Brazil, India, Mexico, Portugal, the UAE, etc.).

11 See Adams, R., Adeleke, F., Florido, A., de Magalhães Santos, L. G., Grossman, N., Junck, L., & Stone, K. (2024). Global Index on Responsible AI 2024 (1st Edition). South Africa: Global Center on AI Governance. https://girai-report-2024-corrected-edition.tiiny.site/ This index assesses responsible AI governance across 138 countries, measuring human rights protections, AI governance policy, and institutional capacities through government actions, frameworks, and non-state actor initiatives.

12 China is considered an emerging economy by the IMF despite its large size and economic power because, while it has experienced rapid GDP growth and industrialization, its per capita income remains significantly lower than developed nations, indicating that its economy is still transitioning toward a fully developed state; this is further supported by factors like ongoing economic reforms, a large developing market, and a focus on infrastructure development.

13 Data was collected from representative research panels sourced by Dynata, a global leader in survey research panel provision.

14 Income was assessed using a question from the World Values Survey Group (WVS; Haerpfer et al., 2022). It was self-reported on a 10-point scale from 1 = Lowest income group to 10 = Highest income group with a 'Prefer not to say' option. For demographic analysis, we re-coded responses into three categories: Low = 1-3, Medium = 4-7, High = 8-10. This is aligned with WVS categorization.

15 Occupational groupings were sourced from *the International Labor Organization's International Standard Classifications of Occupations.*

16 We adapted and simplified the definition to make it accessible to a broad and diverse range of people with varying levels of reading ability, while retaining key defining elements. See discussion of the evolution of the OECD definition of AI in: *What is AI? Can you make a clear distinction between AI and non-AI systems?* Across this report, the terms "AI" and "AI System" are used interchangeably for simplicity.

17 Four of the 17 countries surveyed at both time points are emerging economies: Brazil, China, India, and South Africa. However, as there is no clear differences between advanced and emerging economies in changes over time, so we do not distinguish between them in reporting the findings of change.

18 Responses to the four items assessing AI knowledge were aggregated to produce an overall score.

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19 In support of this interpretation, the *2024 Stanford AI Index* reports accelerated use and adoption of AI in several emerging economies, as well as the increasing economic importance of AI in these countries. Our pattern of findings aligns with a recent Ipsos/Google survey that demonstrates AI use and positive attitudes are particularly high in emerging economies.

20 This definition aligns with dominant interdisciplinary definitions of trust (e.g. Mayer et al., 1995; Rousseau et al., 2009), including trust in technological systems (see McKnight et al., 2002, 2011).

21 Perceptions of trustworthiness are typically higher than trusting intentions because trust involves risk and vulnerability (e.g. by relying on AI output or sharing information with an AI system), whereas perceiving a system as trustworthy does not. There is a strong association between the perceived trustworthiness of AI systems and trusting AI systems (r=.79).

22 We also find people are more willing to share information with healthcare AI systems (57%, M=4.5), than rely on the output of these systems (48%, M=4.2), reflecting the expectation that sharing information with healthcare providers and systems is a routine and necessary part of health care provision. We find this difference between willingness to share information and rely on AI systems across applications.

23 Norway's high level of trust in AI systems, compared to many other advanced economies, may reflect Norwegians' comparatively high levels of AI training and literacy, workplace adoption of AI, trust in government use of AI, and awareness of laws and regulation relating to AI, as evidenced in this report.

24 The *2024 Stanford AI Index* reports accelerated use and adoption of AI in several emerging economies, as well as the increasing economic importance of AI in these countries. Our pattern of findings aligns with a recent Ipsos/Google survey that demonstrates AI use and positive attitudes are particularly high in emerging economies.

25 We asked questions related to the experience or observation of benefits and risks only of people who reported they had experience with the AI application they were allocated, i.e. AI systems (59% reported experience; Emerging = 68%. Advanced = 55%), Generative AI (50% experienced; Emerging = 60%, Advanced = 45%), AI use in Human Resources (21% experienced; Emerging = 31%, Advanced = 15%), or AI use in Healthcare (18% experienced; Emerging = 28%, Advanced = 13%).

26 Some benefits were observed or experienced more in relation to the use of AI in Human Resources and Healthcare. Specifically, people had experienced or observed increased fairness from AI use in Human Resources and Healthcare (62-64%) more so than from Generative AI tools or AI systems in general (41%-42%), and reduced costs and better use of resources from AI use in Human Resources and Healthcare (68-74%) compared to Generative AI or AI systems (59-60%).

27 The list of risks and benefits was the outcome of extensive survey piloting including analysis of open-ended questions asking about benefits and risks of AI systems.

28 Independent surveys showing public desire for regulation include: The Ada Lovelace Institute and The Alan Turing Institute (2025). *How do people feel about AI? Wave two of a nationally representative survey of UK attitudes to AI.* Eurobarometer (2025). Artificial Intelligence and the future of work. Saeri, A., Noetel, M., & Graham, J. (2024). Survey Assessing Risks from Artificial Intelligence (Technical Report). Rethink Priorities (2023). US public opinion of AI policy and risk.

29 Ipsos (2024). Public trust in AI: Implications for policy and regulation. Seth, J. (2024). Public Perception of AI: Sentiment and Opportunity.

30 One of the most significant reforms to legislation and regulation of AI is the EU AI Act, which governs members of the European Union. This act officially entered into force on 1 August 2024, and intends to be fully applicable by 2 August 2026, with some exceptions. We found no difference in the perceived adequacy of regulation or awareness of regulation between people in countries governed by the EU AI Act and people in other countries with advanced economies. This likely reflects that our data collection preceded the practical implementation of the obligations of the EU AI Act, which commenced on 2 February 2025.

31 Structural equation modeling (SEM) is a suite of multivariate techniques that offers advantages over other regression-based approaches. It explicitly accounts for measurement error to yield less biased estimates, estimates latent constructs from observed indicators, and evaluates the fit between the model and the data. Our model fit the data well: $x^2$ (N = 46524, df = 2272) = 113119.70, $p < .001$; CFI: .94, TLI: .94, SRMR: .07, RMSEA: .03. For an accessible guide to the structural equation modeling process, see Kline, R. B. (2023). *Principles and Practices of Structural Equation Modeling* (5th ed.). Guilford Press: New York.

32 'B' refers to the standardized beta coefficient, which indicates the strength of the effect of each independent variable (i.e., driver) on the dependent variable (i.e., outcome). Beta coefficients can be compared to indicate the relative strength of each independent variable. B=.43 from trust to acceptance means that if trust increases by one standard deviation, acceptance is expected to increase by about .43 standard deviations.

33 Bach, T. A., Khan, A., Hallock, H., Beltrão, G., & Sousa, S. (2024). A systematic literature review of user trust in AI-enabled systems: An HCI perspective. *International Journal of Human–Computer Interaction, 40*(5), 1251-1266. Oksanen, A., Savela, N., Latikka, R., & Koivula, A. (2020). Trust toward robots and artificial intelligence: An experimental approach to human–technology interactions online. *Frontiers in Psychology, 11*, 568256.

34 For example, the perceived usefulness of technology is core to technology acceptance models, e.g. Venkatesh, V., & Davis, F. D. (2000). A theoretical extension of the technology acceptance model: Four longitudinal field studies. *Management Science, 46*(2), 186-204. Perceived benefits have also been found to enhance trust in automation: Hoff, K. A., & Bashir, M. (2015). Trust in automation: Integrating empirical evidence on factors that influence trust. *Human Factors*, 57(3), 407-434. https://doi.org/10.1177/0018720814547570.

35 Hoff, K. A., & Bashir, M. (2015). Trust in automation: Integrating empirical evidence on factors that influence trust. *Human Factors*, *57*(3), 407-434. https://doi.org/10.1177/0018720814547570

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36 Beldad, A., De Jong, M., & Steehouder, M. (2010). How shall I trust the faceless and the intangible? A literature review on the antecedents of online trust. *Computers in Human Behavior, 26*(5), 857-869. McKnight, D. H., Choudhury, V. & Kacmar, C. (2002). Developing and Validating Trust Measures for e-Commerce: An Integrative Typology. *Information Systems Research,13*(3), 334-359.

37 The model is similar to the one we produced in our 2023 report, with additional AI literacy metrics to better reflect AI knowledge and efficacy. The replication of the model using the current data collected from 47 countries speaks to the robustness of the model. See 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.org/10.14264/00d3c94

38 See appendix 2 for further details of the employee sample.

39 As participants could select multiple options, the percentages sum to more than 100%. These options were derived from thematic analysis of the key reasons for not using AI identified by employees during our two pilot studies conducted to inform and validate the survey questions. We also included an 'other' option in our global survey to capture participants qualitative reasons for not using AI, which was completed by 360 participants. Thematic analysis of this data revealed the majority (78%) of reasons overlapped with the options reported here.

40 There is no difference across economic groups in the use of publicly available tools (71% in emerging economies vs. 70% in advanced) or tools managed by one's organization (43% vs. 41%, respectively).

41 A caveat is that these differences between economic groups may, in part, reflect that employees in emerging economies have higher levels of AI training and literacy, resulting in a greater understanding of AI and when and how it is used at work, rather than the actual use of AI by the organization.

42 Social desirability bias refers to the tendency for research subjects to give socially desirable responses to sensitive questions instead of providing responses that reflect their true feelings or experiences (see Grimm, 2010, for an overview).

43 See, for example: Chesley, N. (2014). Information and communication technology use, work intensification and employee strain and distress. Work, Employment and Society, 28 (4), 589-610. Malik, N., Tripathi, S., Kar, A., & Gupta, S. (2021). Impact of artificial intelligence on employees working in industry 4.0 led organizations. International Journal of Manpower, 43 (2), 334-354.

44 See, for example: Weibel, A., Den Hartog, D., Gillespie, N., Searle, R., Six, F., & Skinner, D. (2016). How do Controls Impact Employee Trust in the Employer? *Human Resource Management*, 55 (3), 437-462.

45 We adapted a measure from Haesevoets, de Cremer, Dierckx & van Hiel. (2021). Human-machine collaboration in managerial decision making. *Computers in Human Behavior, 119.*

46 This finding also supports prior research reporting concerns about potential job losses resulting from AI and automation. For example: ADP Research Institute (2024). People at Work 2024: A Global Workforce View; Eurobarometer (2025). Artificial Intelligence and the future of work; Pew Research Center (2025). How the U.S. Public and AI Experts View Artificial Intelligence.

47 Organizational support of AI (AI strategy, culture, and support for AI literacy) has no discernible impact on critical engagement. This is likely because its power in predicting critical engagement is largely captured by the more direct measure of AI literacy.

48 Given some groups of employees are significantly more likely to use AI at work, we controlled for AI use frequency when analyzing demographic influences on inappropriate and complacent use behaviors in multivariate analysis of covariance (MANCOVA) models. This is important because frequency of AI use at work is a strong predictor of complacent or inappropriate use of AI (effect size [$n^2$] = .05 to .12). Without controlling for use, demographic effects may be inflated, reflecting greater exposure to AI rather than meaningful differences in how AI is used by different groups of people.

49 The partial eta-squared effect size ($n^2$) helps to explain the practical magnitude of the effect of one variable on another after considering the influence of other variables in the model. Effect sizes of .01, .06, .14 indicate small, medium, and large effects, respectively. The University of Cambridge's MRC Cognition and Brain Sciences Unit provides a user-friendly primer on effect sizes. See also see Lakens, D. (2013). Calculating and reporting effect sizes to facilitate cumulative science: A practical primer for t-tests and ANOVAS. *Frontiers in Psychology, 4*, 863

50 Industry groups were adapted from the International Labour Organization International Standard Industrial Classification of all economic activities.

51 In a historical context, it can be viewed as normal early in the journey of adopting a powerful, disruptive and transformative technology for there to be a period of ambivalence and adjustment until appropriate standards, best practice, norms, governance and regulation emerges to guide development and use and mitigate harms.

52 See the European Commission's (EC) outline of the European approach to artificial intelligence, which is underpinned by the EU AI Act. The EC notes that fostering excellence in AI will strengthen Europe's ability to compete globally, and that trust is central to the vision of making the EU a world-class hub for AI while ensuring safety and fundamental rights.

53 As history has shown, this is not the first time a technology has created this tension, nor will it be the last time. See Frey, C. (2019). *Technology Trap: Capital, Labor, and Power in the Age of Automation. Princeton University Press.*

54 There is some evidence to suggest that practical application of responsible AI mechanisms remain at an early stage including in emerging economies. For examples, see Reul, A., Connolly, P., Meimandi, K., Tewari, S., Wiatrak, J., Venkatesh, D., & Kochenderfer, M. (2024). Responsible AI in the Global Context: Maturity Model and Survey. https://arxiv.org/abs/2410.09985; Renieris, E., Kiron, D, & Mills, S. (2022). To Be a Responsible AI Leader, Focus on Being Responsible. MIT Sloan Management Review and Boston Consulting Group. https://sloanreview.mit.edu/projects/to-be-a-responsible-ai-leader-focus-on-being-responsible/;

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55 See Google's 2024 report examining the economic potential of AI in emerging markets.

56 A recent Ipsos/Google survey also supports this view, showing that people in emerging economies—and particularly Nigeria—are more likely to think that AI will have a positive impact on the economy, suggesting positive perceptions of AI as a driver of economic prosperity.

57 See UK and US refuse to sign international AI declaration.

58 See https://artificialintelligenceact.eu/high-level-summary/

59 World Economic Forum (2024). The Global Risks Report 2024 (19th ed.). https://www.weforum.org/publications/global-risks-report-2024

60 Meta is abandoning fact checking—this doesn't bode well for the fight against misinformation; For further evidence-based information on strategies for countering disinformation see Countering Disinformation Effectively: An Evidence-Based Policy Guide | Carnegie Endowment for International Peace

61 The levels of organizational support for responsible AI may be even lower in practice than how it is reported by employees. This perception-practice gap is illustrated by the 2024 Responsible AI Index, which found that while most executives believe their AI systems align with responsible AI principles, fewer than one-third had actively implemented responsible AI practices.

62 A 2024 Boston Consulting Group study found that only 26% of organizations surveyed have developed the necessary capabilities to move beyond proof-of-concept and generate tangible AI value at scale.

63 For example, ISO Standards 42001, 23894, and 38507 can all help organizations with their AI governance. Further, for an overview of over 900 resources to support responsible AI use, see the OECD's Tools for Trustworthy AI - OECD.AI.

64 Research by the Human Technology Institute at the University of Technology Sydney finds that many employees feel they are "invisible bystanders" in the adoption of AI into their work; that technology is imposed on them rather than being designed with them. The research recommends creating avenues for structured engagement with employees around AI deployment.

65 Current AI governance has heavily emphasized systemic issues—addressing how AI systems are built and how they impact society at large—and comparatively less emphasis has been placed on regulating or guiding the use of AI by individuals. Major policy frameworks and principles—from the EU and OECD to national strategies—emphasize themes such as fairness, transparency, safety, accountability, and human oversight, and typically target AI developers and deployers. Regarding AI use in organizations, see Bird & Bird (2025) AI Governance: Essential Insights for Organizations for analysis observing that most policies focus on high-level standards rather than providing granular guidance around training employees on AI governance or setting rules for employees' day-to-day AI usage.

66 Solomon, L., & Davis, N. (2023) The State of AI Governance in Australia, Human Technology Institute, The University of Technology Sydney; see also International AI Safety Report (2025).

67 We received extensive feedback on the survey throughout its development from academic and industry experts and conducted two large-scale pilot tests (Pilot 1, N = 751 respondents from the UK, USA, and Australia; Pilot 2, N = 793 respondents from the USA and UK). During these pilot tests, we specifically solicited feedback on the construct and face validity of new measures by providing respondents with definitions and asking them to assess whether these adequately covered the intended construct, as well as broader recommendations to enhance the survey.

68 Research suggests that using multiple indicators to determine respondent attentiveness is important: Ward, M. K., & Meade, A. W. (2023). Dealing with careless responding in survey data: Prevention, identification, and recommended best practices. *Annual Review of Psychology*, *74*(1), 577-596. Meade, A. W., & Craig, S. B. (2012). Identifying careless responses in survey data. *Psychological Methods*, *17*(3), 437. Oppenheimer, D. M., Meyvis, T., & Davidenko, N. (2009). Instructional manipulation checks: Detecting satisficing to increase statistical power. *Journal of Experimental Social Psychology*, *45*(4), 867-872.

69 See Field, A. (2013). *Discovering statistics using IBM SPSS statistics (4th ed.)*. Sage: London. (See page 474; values for w2 of .01, .06, .14 indicate small, medium, and large effects respectively).

70 As a rule of thumb, a *Hedges' g* value of .2 is considered a small effect size, .5 a medium effect size, and .8 or larger, a large effect size (see Lakens, D. (2013) Calculating and reporting effect sizes to facilitate cumulative science: A practical primer for t-tests and ANOVAS. *Frontiers in Psychology*, *4*, 863). However, interpretation of effect sizes is subjective, and we have chosen a cut-off of .3 rather than .2 because this ensures a practically meaningful and robust difference which trends toward a medium, rather than a small effect.

71 Respondents' belief that their organization uses AI was asked in a yes/no/don't know format in 2022, while the extent of organizational use (ranging from 1 = not at all to 5 = to a very large extent) was asked in 2024. As such, this variable was re-coded into use (responses = 2-4) vs. no use (response = 1) in order to make meaningful comparisons. Similarly, employee AI use was measured slightly differently across time. Change in total use, rather than regular or semi-regular use, is reported.

72 Comparative data sourced from https://data-explorer.oecd.org/ or from https://databank.worldbank.org/source/education-statistics:-Education-Attainment where not available from OECD.

73 This is often a limitation of online public attitude surveys (e.g. see University of Oxford's Reuters Institute report How we follow climate change: Climate news use and attitudes in eight countries, and the OECD's technical details of its 2021 survey of drivers of trust in government institutions for acknowledgement and discussion).

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