



KPMG GENERATIVE AI CONSUMER TRUST SURVEY

Key Findings

—

January 2024

Takeaways

- **Consumers are optimistic about the benefits of generative AI as the technology becomes more pervasive.** 7 in 10 consumers believe that generative AI's benefits outweigh its risks. Consumers are using it in their personal and professional lives and expect that usage to increase in two years. They see potential for generative AI to address a range of issues, including its ability to improve mental and physical health, address cybersecurity issues and develop new sustainability strategies.
- **Consumers trust the use of generative AI across various applications.** The highest levels of trust are associated with using it for: education resource, personalized recommendations, customer service and business uses.
- **While there are concerns about the technology, job displacement and bias are not top concerns.** Many (60%+) see risks with the technology generating fake news and content, creating scams and launching cybersecurity attacks.
- **There are high expectations for the ethical use of generative AI.** Consumers think that all types of organizations – those that develop it, use it and regulate it – have responsibility to do so ethically. However, organizations are facing a trust gap as most consumers do not fully trust them to ensure the ethical use of GenAI.
- **While trust is low, consumers say applying a range of practices could help organizations gain their trust.** Most notably, education and training, regular internal audits and monitoring, collaboration and regulatory adherence and third-party reviews are seen as the most effective practices for ensuring ethical use.
- **There are clear generational differences in excitement and trust.** Gen Z and Millennials are much more excited about the potential benefits of generative AI and are less inhibited by its potential risks.
- **Most would like to see more AI-focused regulation.** Half (48%) of consumers feel like there is not enough regulation of generative AI right now – compared to a third (31%) that think regulation is “about right.”

Methodology & Respondent Profile



Methodology

- **Online survey** conducted nationally among **1,000 adults (22+)**.
- The sample includes **'informed public'** respondents that had to:



Closely follow **news related to scientific advances** and new technologies.



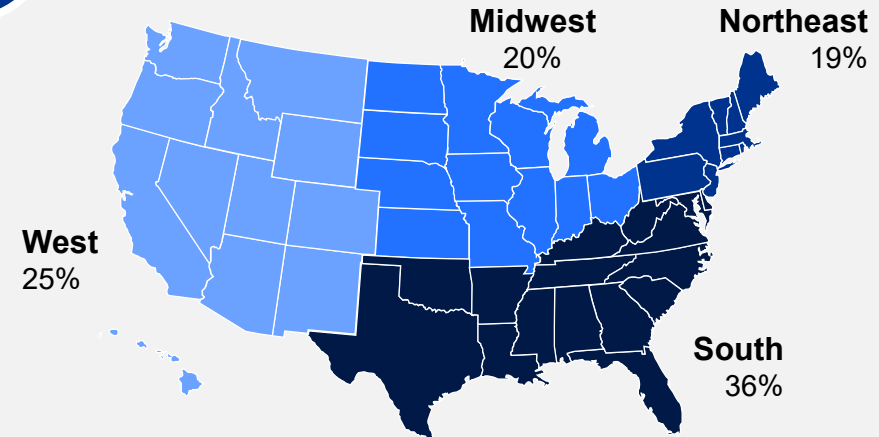
Read a **major daily newspaper** at least daily or several times per week (print or online).

- **Respondents also screened** for having a college degree, and HH income of 75K+.
- The survey was **conducted** between **December 8th – December 15th 2023**.

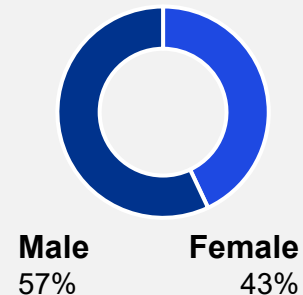


Respondent Profile

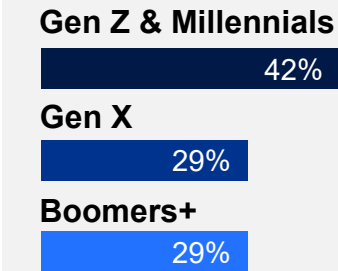
REGION



GENDER



GENERATION



INCOME

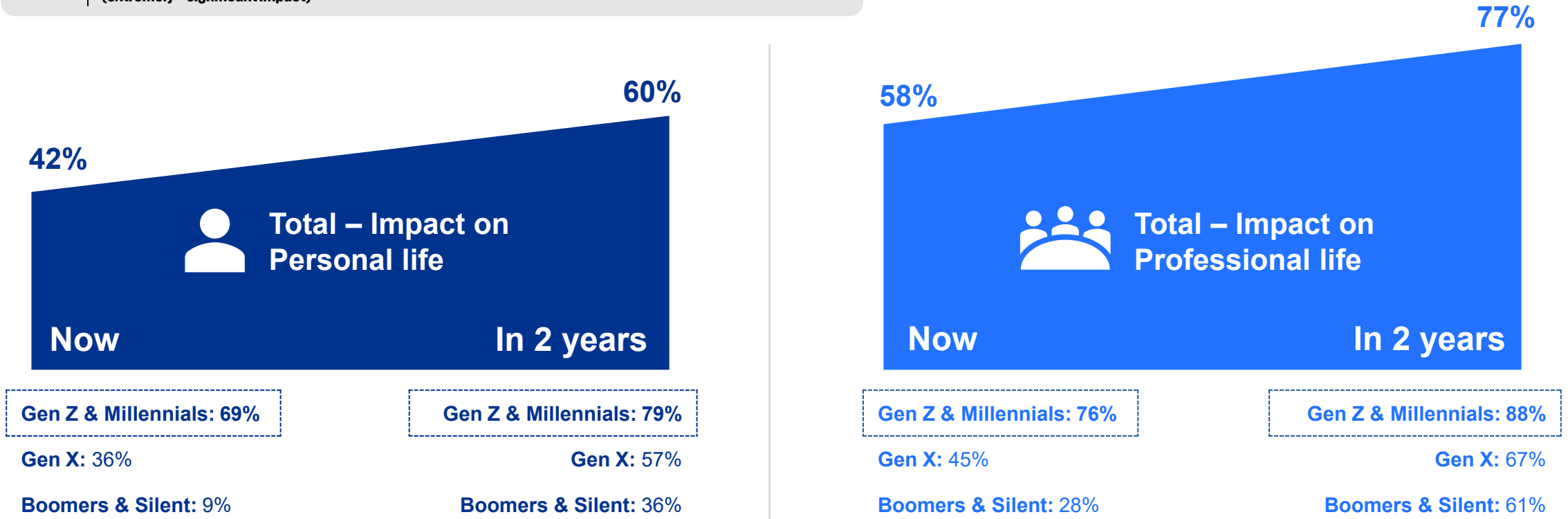


Generative AI is going mainstream. People are using it in their personal and professional lives today – and expect that usage to increase in 2 years.

Younger generations are much more likely to say that it is having a greater impact on their personal and professional lives.



Impact of Generative AI on Personal and Professional Life (extremely + significant impact)



Q. How significant of an impact do you feel generative AI has on your day-to-day life right now...how significant in the next 1-2 years?



Consumers feel that generative AI will be helpful in addressing a range of issues, more so for improving health and cybersecurity.

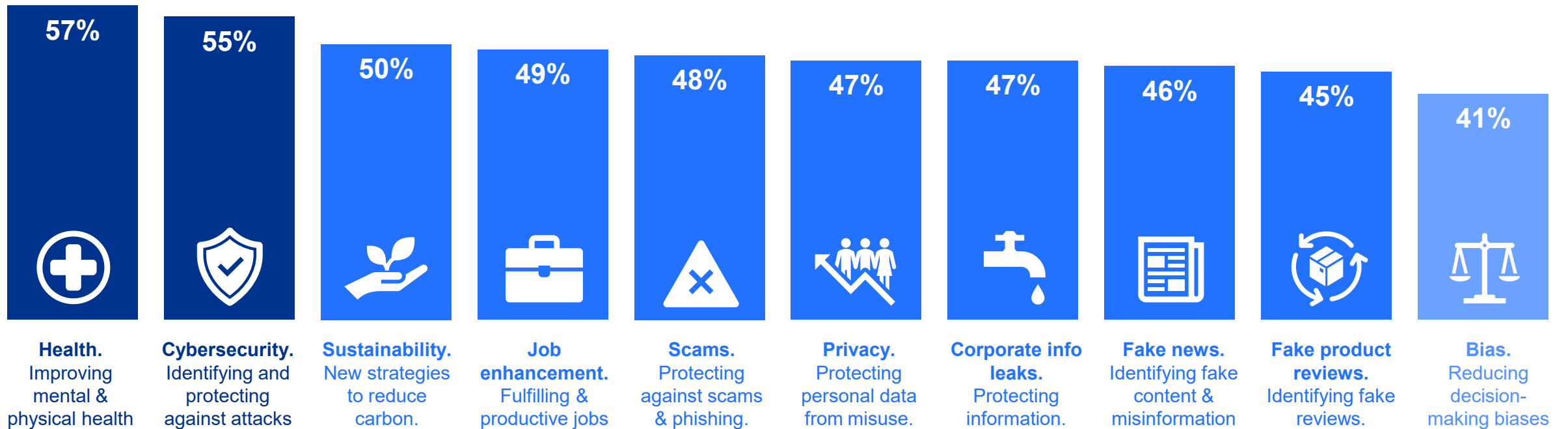
Fewer see how GenAI can be helpful in addressing some of the perceived risks of the technology, including reducing bias



Perceived Helpfulness of Generative AI in Addressing Issues

(Extremely + very helpful)

Most helpful



Q. How helpful do you think Generative AI can be in addressing the following issues?

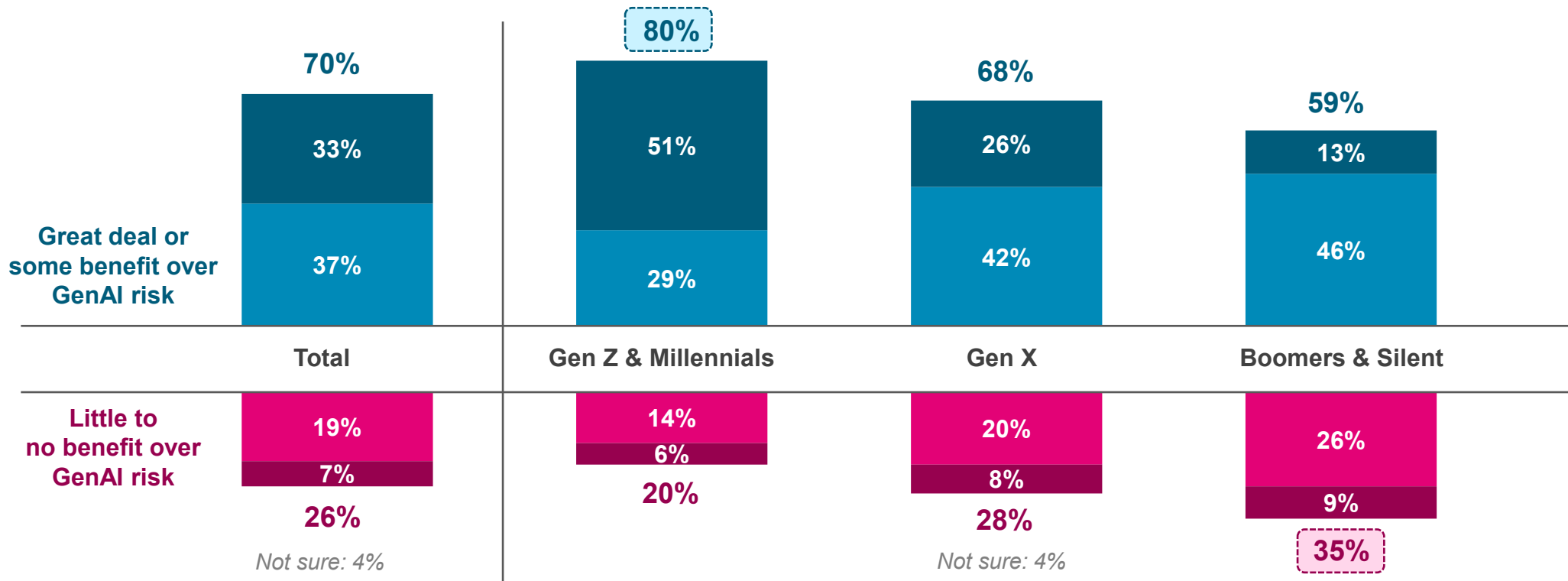


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A majority believe that generative AI's benefits outweigh its risks, though older generations remain more skeptical.



Extent to which Generative AI's Benefits Outweighs its Risk to Society



Q. To what extent do you feel that the benefits of generative AI outweigh the threats or risks?



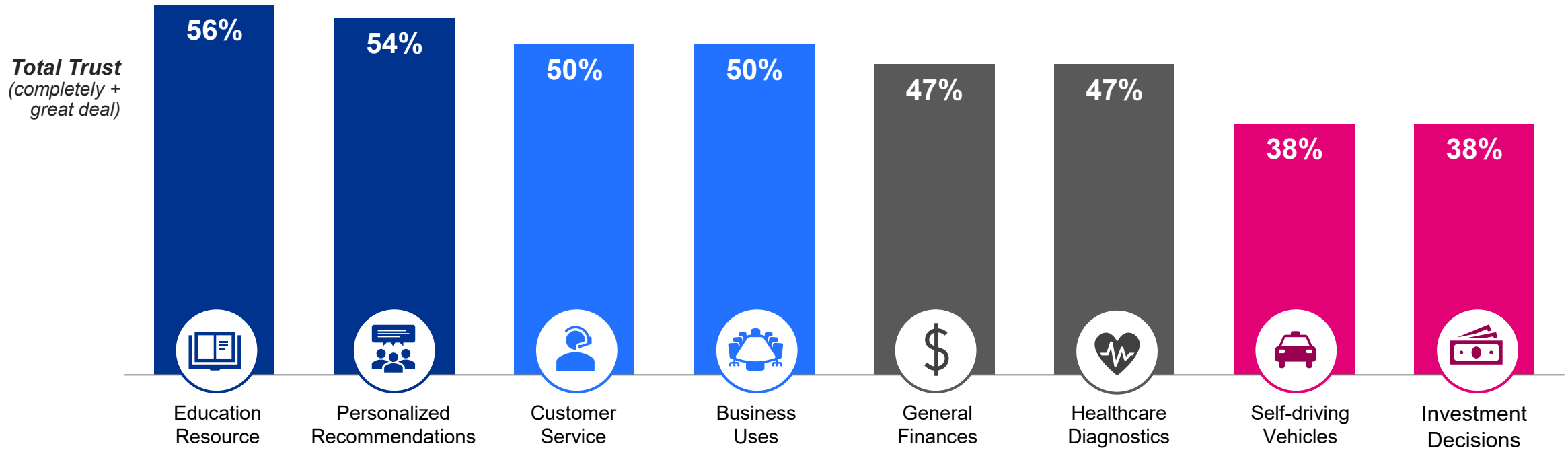
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Consumers have the most trust in generative AI for education and personalized recommendations.

Consumers are least likely to trust generative AI for investment advice and self-driving cars.



Consumer Trust in Use of Generative AI across Various Applications



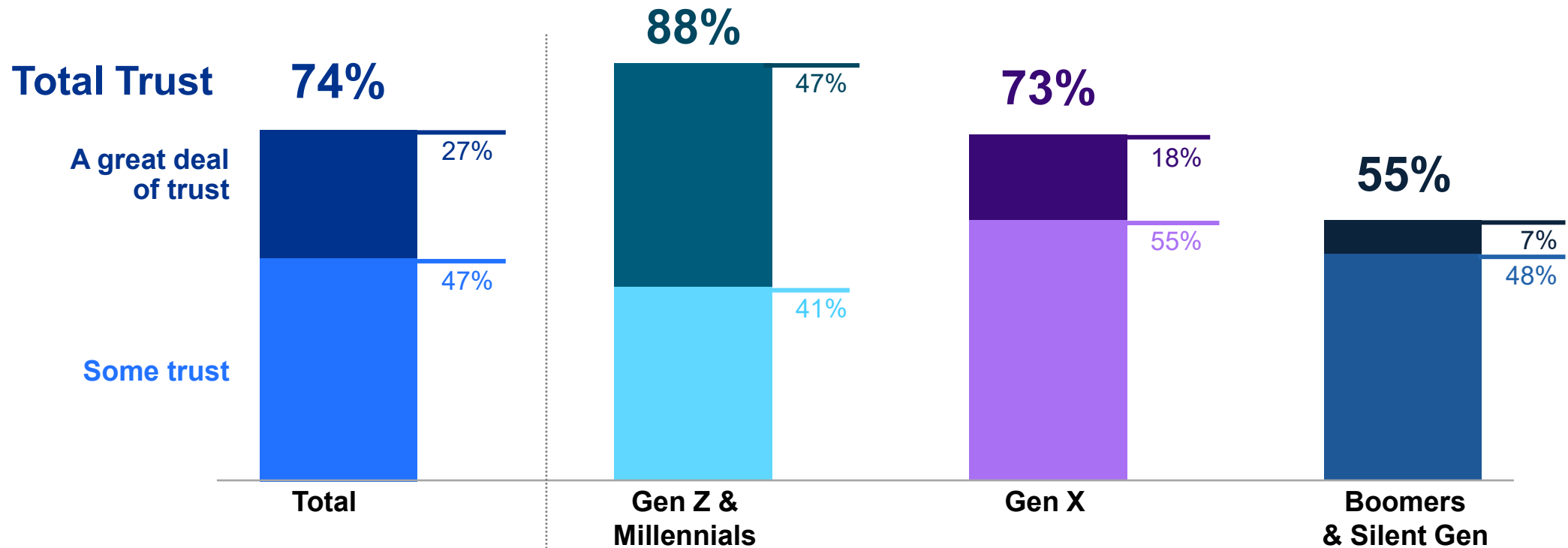
Q. How much would you personally trust generative AI in each of the following areas?

Consumers largely trust organizations that are using generative AI more regularly in their day-to-day operations.

Gen Z and Millennial consumers outpace other generations in their trust of organizations using this technology.



Consumer Trust in Organizations Using Generative AI in Day-to-day Operations



Q. How much do you trust organizations that increasingly use generative AI in their day-to-day operations?



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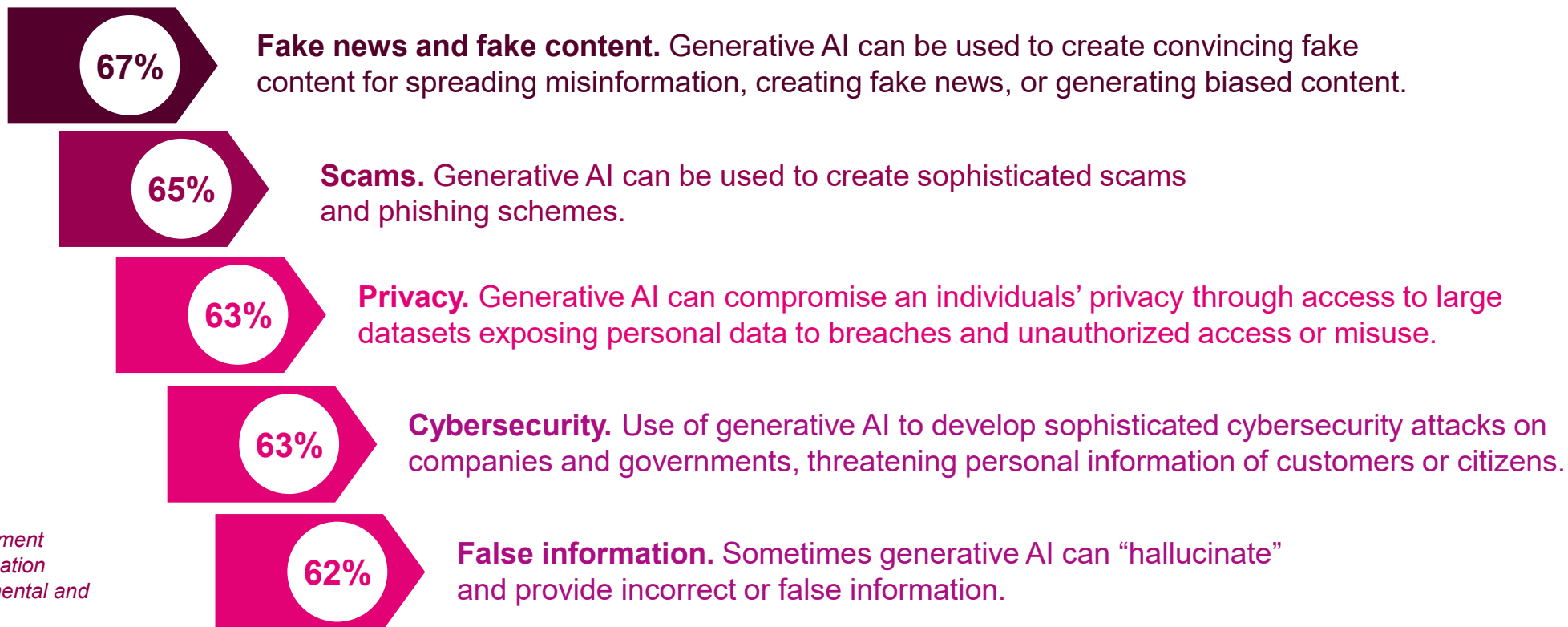
There are a range of concerns about the use of generative AI, especially related to generating fake news and content and scams.



Concerns about the development and use of Generative AI (Extremely + very concerned)



Top 5 areas where Generative AI is driving concern



Lesser concern about job displacement (51%), bias (50%), corporate information leaks (49%) – least concern about mental and physical health (40%).

Q. How concerned are you about each of the following related to the development and use of generative AI?

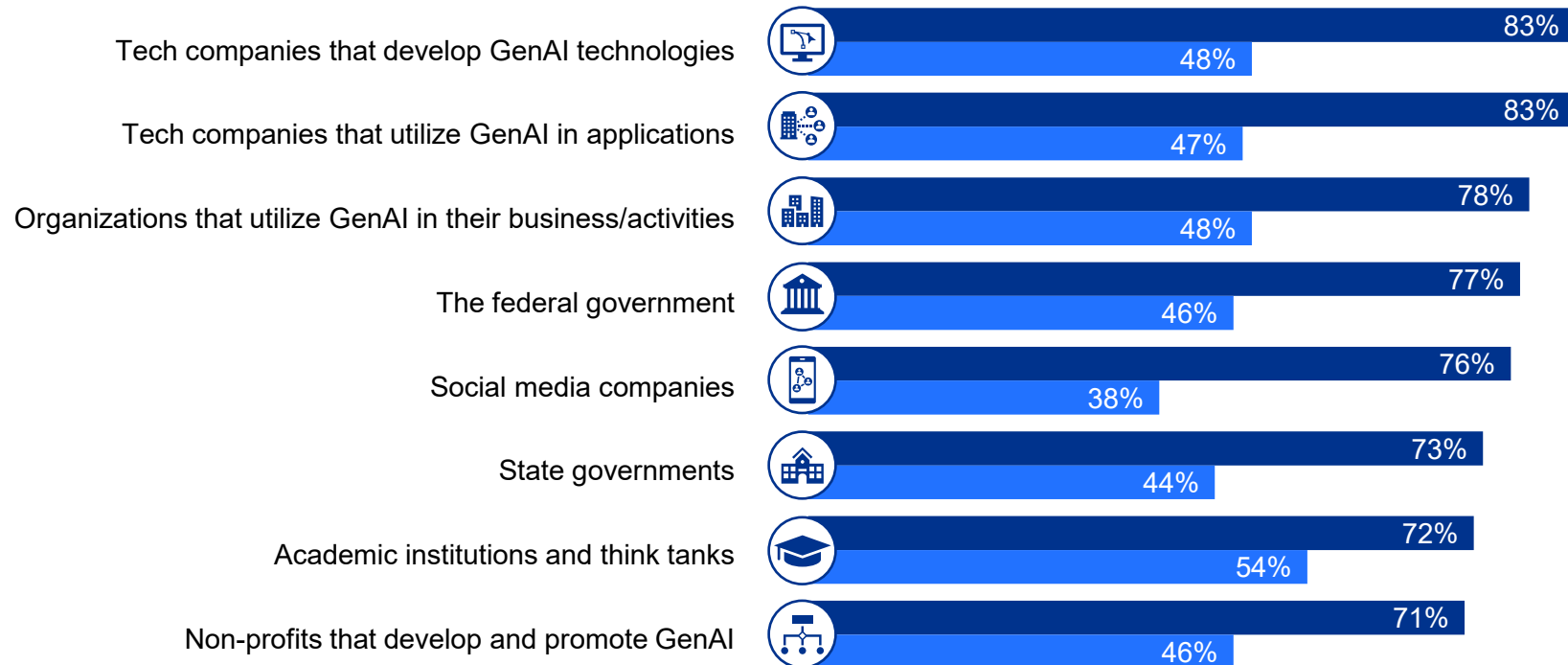


Across the board, there isn't high trust in any institution to ensure that generative AI is developed and used ethically.

Consumers have high expectations for all types of organizations to develop and use generative AI ethically.



Responsibility & Trust in Organizations to Develop and Use Generative AI Ethically



Organization has responsibility to ensure ethical use (extremely + very)

Organization is trusted to use ethically (completely + great deal)

Q. How responsible should each of the following be in ensuring that generative AI is developed and used ethically?

Q. How much do you trust each of the following in ensuring that generative AI is developed and used ethically?

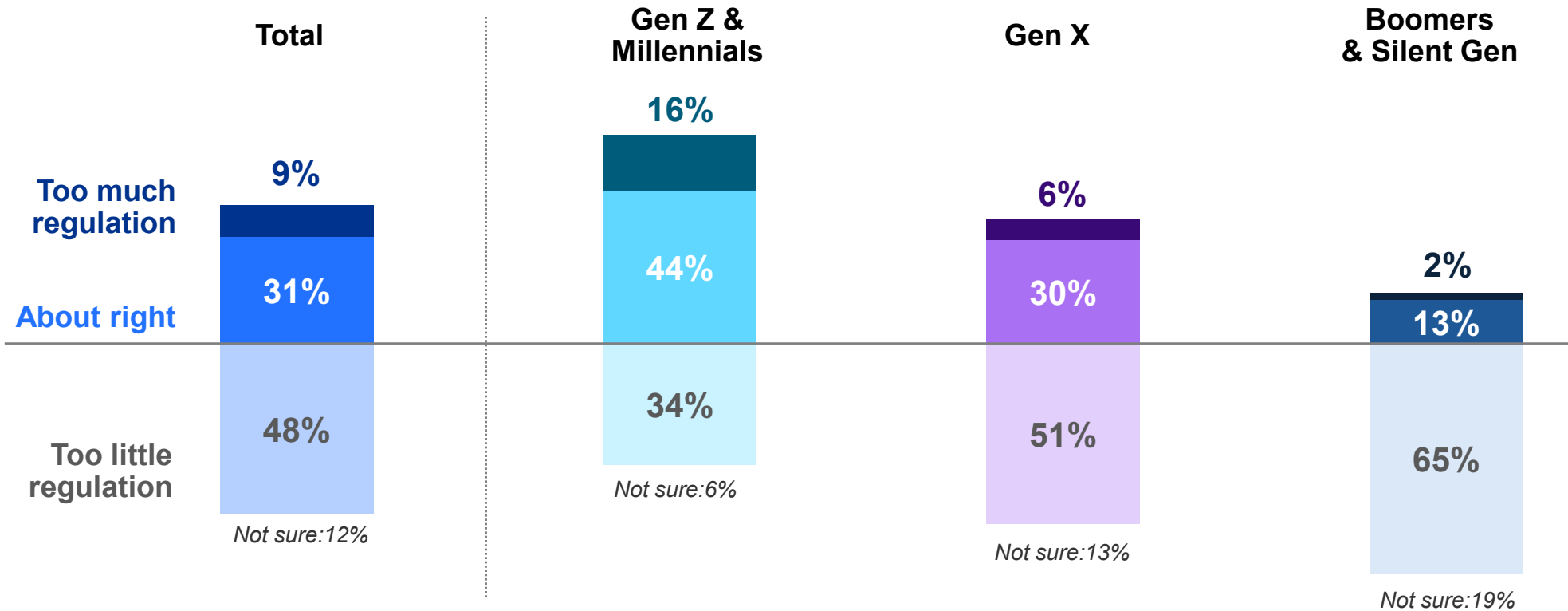


Most consumers see current federal regulations around generative AI use as too little.

Older generations – Gen X, Boomers, and Silent Gen – are more likely than younger consumers to find current regulations lacking.



Perception of Current Federal Regulations about Generative AI



Q. Do you think that the current federal regulations around the development and use of generative AI are..?



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Consumers say a range of business practices would be effective in ensuring the ethical use of generative AI.

This presents the opportunity for companies and organizations to build trust by employing and communicating about these practices.



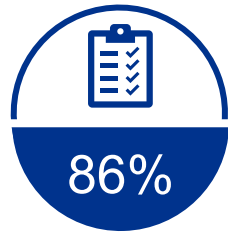
Business Practices Perceived as Effective for the Ethical Use of Generative AI

Total Effective
(very + somewhat)



Education & Training

Provide ongoing education and training for employees to raise awareness about ethical GenAI practices and potential risks associated with its use.



Regular Audits & Monitoring

Implement regular internal audits to assess GenAI systems for biases, fairness, and security vulnerabilities.



Collaboration & Regulatory Adherence

Collaborate with regulatory bodies and industry peers to establish industry standards and best practices for responsible GenAI use.



Third-party Review

Having outside experts review and make recommendations on a company's oversight of its use of GenAI.



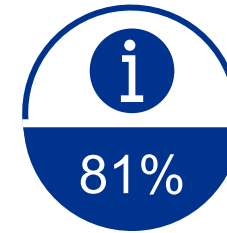
Human Oversight

Implement human oversight in GenAI processes, especially in critical decision-making areas to help catch errors, biases, or ethical concerns that GenAI might miss.



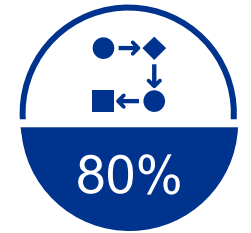
Privacy Measures

Prioritize data privacy using robust data anonymization techniques.



Disclosure

Using watermarks or disclosures like made with generative AI or made with the assistance of GenAI so consumers will know the source of the content.



Ethical Frameworks

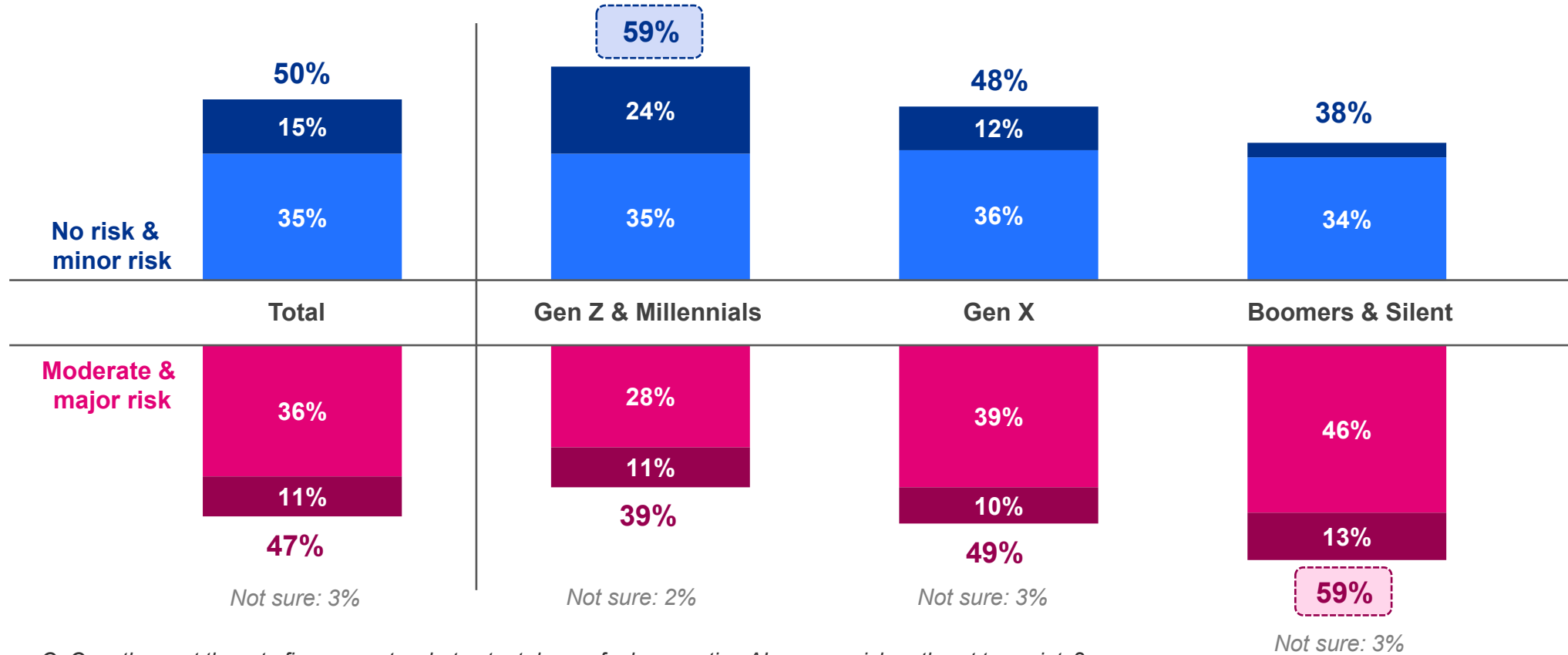
Establish clear ethical guidelines for GenAI use within the organization. Emphasize transparency, fairness, and accountability in AI-driven processes.

Q. How effective do you feel each of the following business practices would be in ensuring the ethical use of generative AI within a company or organization?

There are generational differences when it comes to the perceived risk that generative AI poses to society.



Extent to which Generative AI Poses a Risk to Society



Q. Over the next three to five years, to what extent do you feel generative AI poses a risk or threat to society?



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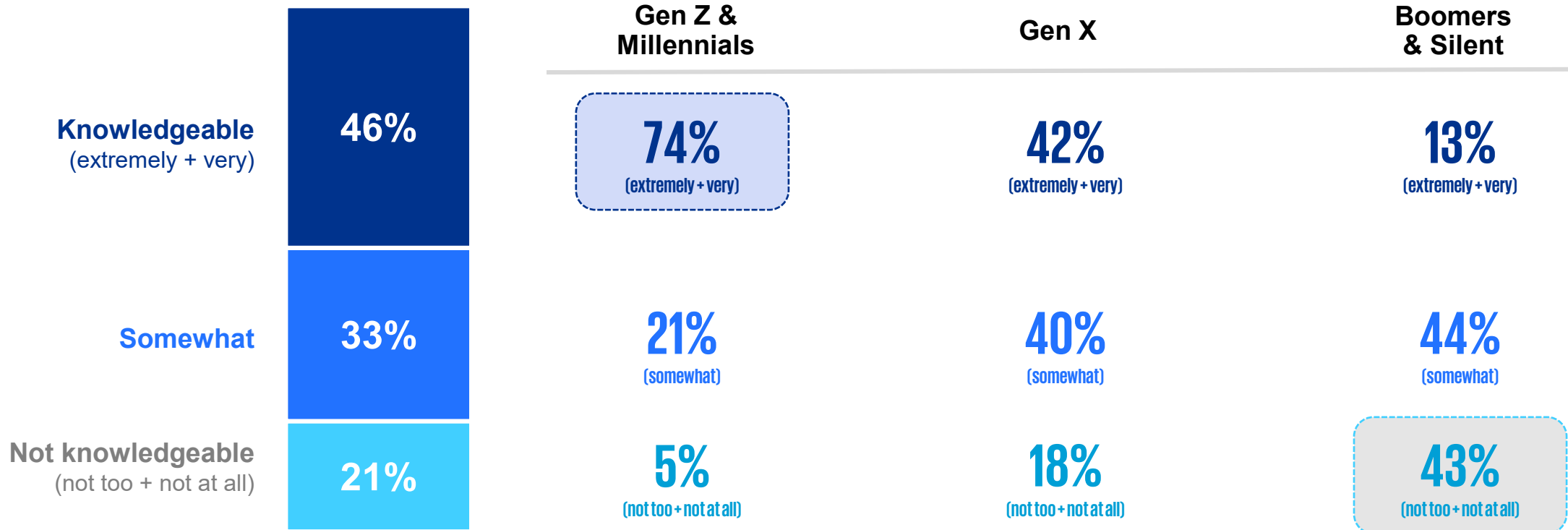
Generational Differences

Younger generations feel more knowledgeable about generative AI than older ones.

Nearly all Boomers and Silent generation feel 'somewhat' or 'not that' knowledgeable about generative AI (87%).



Level of Knowledge about Generative AI



Q. How knowledgeable do you feel about generative AI?



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