

Insights 2024: Attitudes toward Al



Methodology:

15 mins online quantitative survey with ~3,000 people working in Research and Healthcare globally



Focus of survey:

Survey to uncover awareness, usage and perceptions of AI, including generative AI, identifying its current and potential use cases.

Who we surveyed:

Respondents are a sample of those working in Research (including Leaders and Corporates) and in Health (clinicians) from a variety of sources.

How many:

We achieved ~3,000 completed surveys from a range of disciplines and geographies. Please refer to the appendix for a more detailed breakdown. Please note clinicians undertaking research as part of their role count as both clinicians and researchers.

When:

Fieldwork was conducted late December 2023 to February 2024.

Results:

Results are weighted based on <u>OECD/Pharma Factbook population figures for researchers and clinicians</u> by region, and to equally represent Research and Health sectors in the totals. Health is weighted 50:50 medicine and nursing.



Chapters by Theme



1	Awareness of Al	Slide 5
2	Usage of Al	Slide 16
3	Perceptions of Al	Slide 68
4	Areas That Would Benefit From Al	Slide 156
5	Likelihood To Use an Al Assistant	Slide 160
6	Al & Elsevier	Slide 166



Data Breakdowns Included



Gl	obal Summary (including verbatim comments)	NB. included in the total but are not broken out		
•	Persona (Researchers & Clinicians)			
•	Region	N=43, 1% of total, prefer not to say where they live		
•	Key Markets			
•	Gender	N=159, 5% of total, are non-binary/gender diverse or preferred not to specify their gender		
•	Years Active	N=247, 8% of total, prefer not to say how long they have been active in their area of work		
•	Country Income Band grouped as per the Word Bank	N=23, 0.8% of total, prefer not to say where they live. Also, n=20, 0.7% of total, live in low-income countries (n too low to breakout)		



1. Awareness of Al

Theme 1



Awareness of Al

To what extent are you familiar with AI? (only shown by persona, region, key market and country income band). Subsequent statistics exclude those not familiar with AI.	Slide 7
Which of these AI products, if any, have you heard of before today? (only shown top 8)	Slide 12



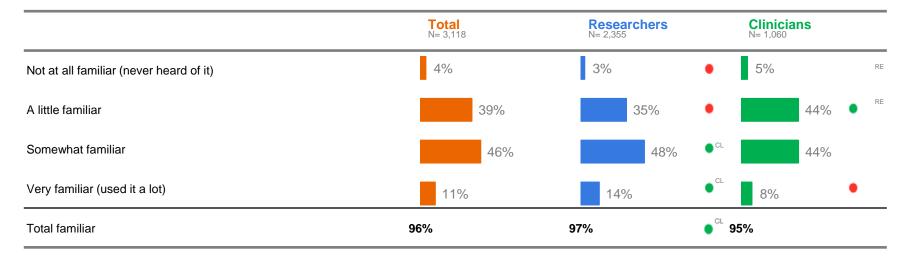
Most have heard of AI, but only around one in ten are very familiar with it



	% Selected
Not at all familiar (never heard of it)	4%
A little familiar	39%
Somewhat familiar	46%
Very familiar (used it a lot)	11%
Total familiar	96%

Awareness of AI is high globally, researchers are more familiar with AI than clinicians





Clinicians

Global

Total

Awareness of AI is high globally across regions



	Total N= 3,118	Asia Pacific N= 931	Europe N= 998	North America N= 464	South America N= 479	Middle East & N= 203	Africa
Not at all familiar (never heard of it)	4%	4%	NA 3%	2%	5%	NA EU 5%	O NA
A little familiar	39%	40%	NA 42%	NA SA MEA 32%	37%	34%	0
Somewhat familiar	46%	44%	46%	52%	EU AP 47%	49%	O AP
Very familiar (used it a lot)	11%	13%	^{EU} 8%	13%	11%	11%	0
Total familiar	96%	96%	97%	sa 98%	SA AP 94%	95%	

Questions: To what extent are you familiar with AI?

Awareness of AI is high across the three most populous countries, China is highest



	Total N= 3,118	USA N= 405	China N= 362	India N= 138	
Not at all familiar (never heard of it)	4%	3%	сн 1%	• 3%	СН
A little familiar	39%	32%	42%	us 49%	• CH US
Somewhat familiar	46%	51%	• IN 45%	39%	•
Very familiar (used it a lot)	11%	14%	• ^{IN} 13%	9%	
Total familiar	96%	97%	99%	● IN 97%	

Questions: To what extent are you familiar with AI?



Awareness of AI is high globally, those in high income and uppermiddle income countries have greater familiarity with Al



	Total N= 3,118	High Income N= 1,580	Upper- Middle-In N= 1,071	come Middle-Income N= 368	e
Not at all familiar (never heard of it)	4%	3%	9 2%	• 4%	HI UM
A little familiar	39%	29%	99%	н 41%	НІ
Somewhat familiar	46%	52%	• UM 45%	45%	
Very familiar (used it a lot)	11%	16%	• um 13%	10%	
Total familiar	96%	97%	● LM 98%	● LM 96%	

Note. Subsequent statistics exclude those not familiar with AI.

Total

Questions: To what extent are you familiar with AI?



ChatGPT is the tool most have heard about. This is consistent across regions, with the lowest awareness of ChatGPT in South America



	Total N= 2999	Asia Pacific N= 894	Europe N= 968	North America N= 450	South America N= 451	Middle East & Africa N= 193
ChatGPT	89%	91% • S	92%	NA SA 89% SEA	75% •	87 % SA
Bard (Google)	40%	42% E	33%	47% • g	9 U A A	36%
Bing Chat	39%	41% E	34%	45% • s	35% •	37%
Gemini (Google)	22%	21%	23%	меа 23 % ме	24% MEA	17%
MS Copilot (in Word, Excel, PPT)	22%	20% ME	21% M	меа 23% ме	AA 30% EU NA MEA	13%
Semantic Scholar	17%	10%	19%	ар 28% • Д	25% • AF	32% • AP
ChatPDF.ai	13%	14%	12%	13%	15%	12%
OpenEvidence	8%	9% N	11%	NA 4%	9%	3%

Note: Only top 8 products shown

Questions: Which of these AI products, if any, have you heard of before today?

Significantly higher/lower than...
Significantly higher than...
Significantly higher than...
Significantly higher than...
Significantly higher than...

ChatGPT is the tool most have heard about. More in the USA have heard of Bard, Bing Chat and Semantic Scholar than average



	Total N= 2999	USA N= 393	China N= 358	India N= 134
ChatGPT	89%	89%	90%	94% o us
Bard (Google)	40%	48% • сн	40%	43%
Bing Chat	39%	45% • CH	38%	37%
Gemini (Google)	22%	23%	21%	25%
MS Copilot (in Word, Excel, PPT)	22%	24% сн	17%	18%
Semantic Scholar	17%	30% • CH	3%	21% CH
ChatPDF.ai	13%	13%	16%	16%
OpenEvidence	8%	5%	11% IN US	2%

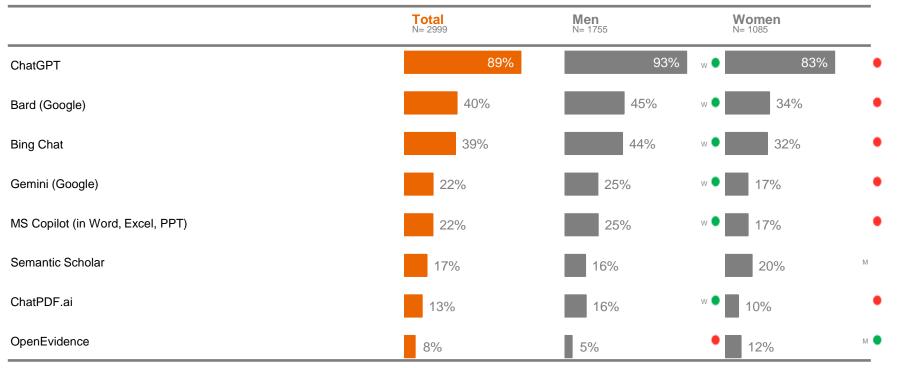
Note: Only top 8 products shown





ChatGPT is the tool most have heard about. Men are more likely to have heard of AI specific products than women





Note: Only top 8 products shown

Questions: Which of these Al products, if any, have you heard of before today?

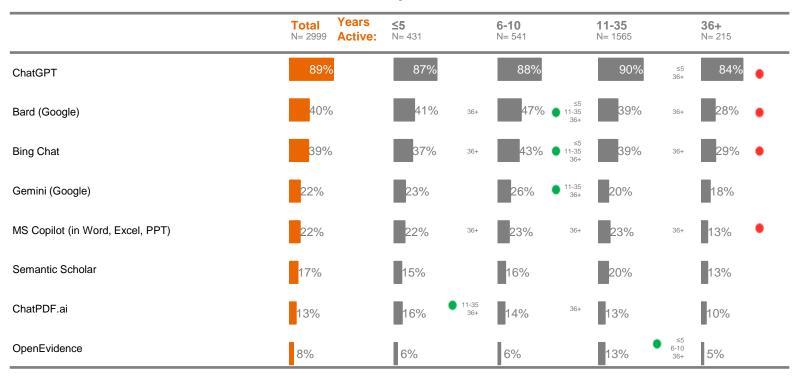


Significantly higher/ lower than . .

Significantly higher than..

Those active in their area of work the longest are less likely to have heard of the more well-known Al products





Note: Only top 8 products shown

Questions: Which of these AI products, if any, have you heard of before today?



2. Usage of Al

Theme 2



Usage of Al

Have you used an AI product or an AI feature on a product you use regularly?	Slide 18
Which, if any, AI products or AI features have you used for work purposes? (only shown top 8)	Slide 25
Which of the following describes why you haven't used an AI product or AI feature?	Slide 33
Do you expect you will choose to use AI in the near future?	Slide 40
Which restrictions, if any, does your institution currently have with regards to AI usage?	Slide 47
In which ways, if any, is your institution preparing for AI usage?	Slide 54



Of those who are familiar with AI, nearly a third have used AI for their work



	% Selected
Yes - for a specific work-related purpose	31%
Yes – but just to test it or for a non-work purpose	23%
No	44%
Don't know / not sure	1%



Of those who are familiar with AI, over half have used it. Researchers are more likely to have used AI than clinicians for work purposes



	Total N= 2999	Researchers N= 2284	Clinicians N= 1007
Yes - for a specific work-related purpose	31%	37% ● CL	26%
Yes – but just to test it or for a non-work purpose	23%	22%	24%
No	44%	40%	49% ● RE
Don't know / not sure	1%	1%	1%

Of those who are familiar with AI, over half have used it. Europeans are less likely to have used AI than those in other regions



	Total N= 2999	Asia Pacific N= 894	Europe N= 968	North America N= 450	South America N= 451	Middle East & Africa N= 193
Yes - for a specific work-related purpose	31%	34% EU MEA	29%	30%	30%	27%
Yes – but just to test it or for a non-work purpose	23%	22%	23%	21%	28% • EU	34% • AP EU NA
No	44%	43%	47% • A S	P A A 48% SA MEA	41%	37%
Don't know / not sure	1%	1%	1%	1%	1%	2% AP SA

Questions: Have you used an AI (including generative AI) product or an AI feature on a product you use regularly?





Global

Of those who are familiar with AI, over half have used it. Across the three most populous countries those in China are most likely to have used it for a work-related purpose



	Total N= 2999	USA N= 393	China N= 358	India N= 134
Yes - for a specific work-related purpose	31%	30%	ім 39%	● IN US 22%
Yes – but just to test it or for a non-work purpose	23%	21%	18%	• 27% сн
No	44%	48%	43%	50%
Don't know / not sure	1%	1%	0%	1%

Questions: Have you used an AI (including generative AI) product or an AI feature on a product you use regularly?

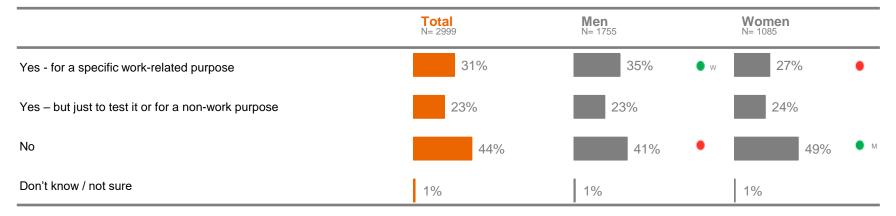




Global

Of those who are familiar with AI, over half have used it. Men are more likely to have used AI, both in general, and for work purposes





Questions: Have you used an AI (including generative AI) product or an AI feature on a product you use regularly?

Of those who are familiar with AI, over half have used it. Those with over 35 years' experience in their area of work are less likely to have used Al



	IOtal	ears ctive:	≤5 N= 431	6-10 N= 541	11-35 N= 1565	36+ N= 215
Yes - for a specific work-related purpose	31%		29%	37% • 11-35 36+	32% 36+	24%
Yes – but just to test it or for a non-work purpose	23%		29% • 6-10 11-35 36+	22%	23% 36+	18%
No	44%		42%	41%	44%	56% • 6-10 11-35
Don't know / not sure	1%		1%	0%	1%	1%

Total

Of those familiar with Al over 30% have used Al for work. In lowermiddle-income countries work usage drops to a fifth



Base: n= 2999

	Total N= 2999	High Income N= 1533	Upper- Middle-Income N= 1050	Lower- Middle-Income N= 353
Yes - for a specific work-related purpose	31%	31%	35% • н	21%
Yes – but just to test it or for a non-work purpose	23%	24% им	21%	26%
No	44%	43%	43%	52% • HI
Don't know / not sure	1%	1%	1%	2% • HI

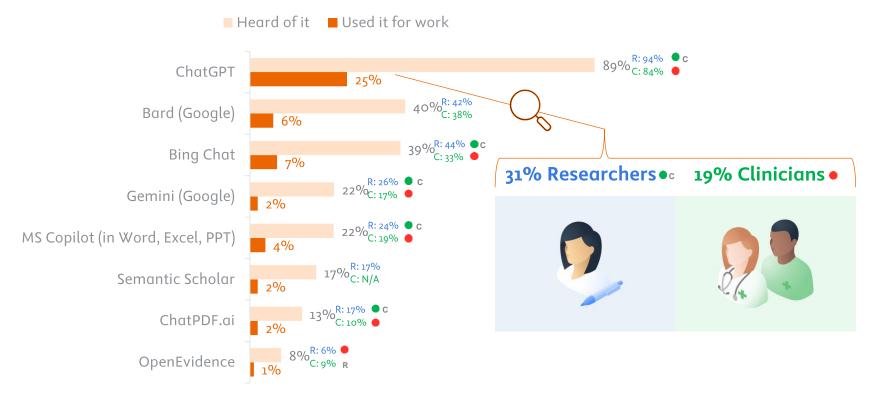
Questions: Have you used an AI (including generative AI) product or an AI feature on a product you use regularly?

Significantly higher than...



ChatGPT is most well-known AI product and most used for work, more researchers than clinicians have used it for work





ChatGPT most used tool for work, work use of other AI solutions low



	% used for work N= 2999
ChatGPT	25%
Bing Chat	7%
Bard (Google)	6%
MS Copilot (in Word, Excel, PPT)	4%
ChatPDF.ai	2%
Semantic Scholar	2%
Gemini (Google)	2%
SciSpace	1%

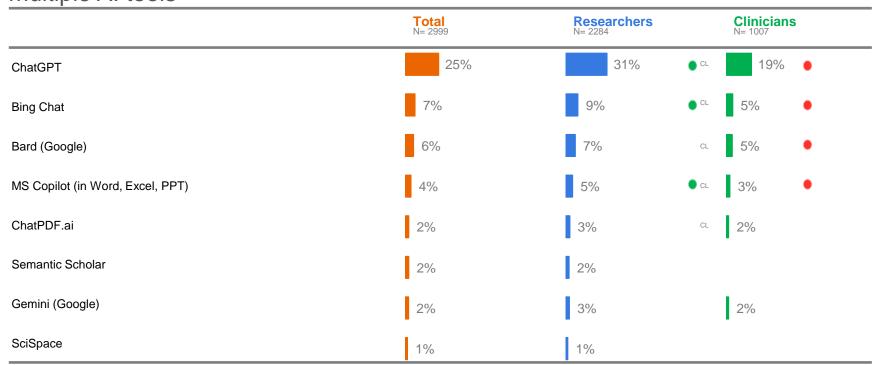
Note: Only top 8 products shown





A quarter have used ChatGPT for work overall; significantly higher among researchers than clinicians. Usage generally lower amongst clinicians across multiple AI tools





Note: Only top 8 products shown







Significantly higher than..

ChatGPT is most used for work across regions, other tools generally have low use across regions



	Total N= 2999	Asia Pacific N= 894		Europe N= 968		North America N= 450	South Am N= 451	erica	Middle Eas Africa N= 1	
ChatGPT	25%	27%	EU	23%		24%	24%		22%	
Bing Chat	7%	9%	EU NA SA	6%		5%	6%		7%	
Bard (Google)	6%	6%		5%	•	7% EU	8%	• EU	5%	
MS Copilot (in Word, Excel, PPT)	4%	4%		4%		5% MEA	5%	MEA	2%	
ChatPDF.ai	2%	2%		3%	AP	2%	3%		2%	
Semantic Scholar	2%	1%		3%	AP	2%	5%	AP	7%	AP EU NA
Gemini (Google)	2%	2%		2%		2%	3%	EU NA	2%	
SciSpace	1%	2%		1%		0%	2%	NA	1%	

Note: Only top 8 products shown

Questions: Which, if any, Al products or Al features have you used for work purposes? Base: n= 2999



Across the three most populous countries ChatGPT is more used by those in China



	Total N= 2999	USA N= 393	China N= 358	India N= 134
ChatGPT	25%	24%	30%	19%
Bing Chat	7%	5%	10%	us 8%
Bard (Google)	6%	8%	сн 4%	8%
MS Copilot (in Word, Excel, PPT)	4%	6%	сн 3%	5%
ChatPDF.ai	2%	2%	^{IN} 2%	0%
Semantic Scholar	2%	3%	^{CH} 0%	3%
Gemini (Google)	2%	1%	3%	3%
SciSpace	1%	0%	1%	6% ch

Note: Only top 8 products shown

Total



Significantly higher/lower than... Significantly higher than..



Al tools generally more used for work purposes by men than women



	Total N= 2999	Men N= 1755	Women N= 1085
ChatGPT	25%	30% • w	19%
Bing Chat	7%	10% • w	4%
Bard (Google)	6%	7% • w	4%
MS Copilot (in Word, Excel, PPT)	4%	5% • w	3%
ChatPDF.ai	2%	3% w	1%
Semantic Scholar	2%	3%	2%
Gemini (Google)	2%	2%	2%
SciSpace	1%	2%	1%

Note: Only top 8 products shown

Significantly higher/ lower than...

Significantly higher than...

Gender/Generation (indicated by first letter e.g. M= Men)

Back to home



ChatGPT is more used by those with 6-10 years' experience



	Total Years N= 2999 Active:	≤5 N= 431	6-10 N= 541	11-36 N= 1565	36+ N= 215
ChatGPT	25%	23%	31% • 11-35 36+	25% 36+	18%
Bing Chat	7%	6% 36+	10% • 11-35 36+	7% 36+	3%
Bard (Google)	6%	8% 11-35	8% 11-35	5%	4%
MS Copilot (in Word, Excel, PPT)	4%	3%	5% ^{≤5} ₃₆₊	4%	2%
ChatPDF.ai	2%	3%	2%	3%	1%
Semantic Scholar	2%	2%	1%	3%	1%
Gemini (Google)	2%	4% 11-35 36+	3%	2%	1%
SciSpace	1%	1%	2%	1%	0%

Note: Only top 8 products shown

Questions: Which, if any, Al products or Al features have you used for work purposes? Select: all that have used



A quarter have used ChatGPT for work purposes. Least usage in lower-middle-income countries



Base: n= 2999

	Total N= 2999	High Income N= 1533		Upper- Middle-Income N= 1050		Lower- Middle-Income N= 353	<u></u>
ChatGPT	25%	27%	LM	26%	LM	17%	
Bing Chat	7%	7%		8%		7%	
Bard (Google)	6%	7%		5%		6%	
MS Copilot (in Word, Excel, PPT)	4%	5%	UM	3%		3%	
ChatPDF.ai	2%	3%	LM	2%	LM	1%	
Semantic Scholar	2%	3%	UM	1%		4%	
Gemini (Google)	2%	2%		3%	HI	2%	
SciSpace	1%	2%		1%		3%	UM

Significantly higher/lower than...

Note: Only top 8 products shown

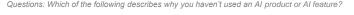
Questions: Which, if any, Al products or Al features have you used for work purposes?



The most common reason for those who haven't used AI is they haven't had time to investigate or experiment with it



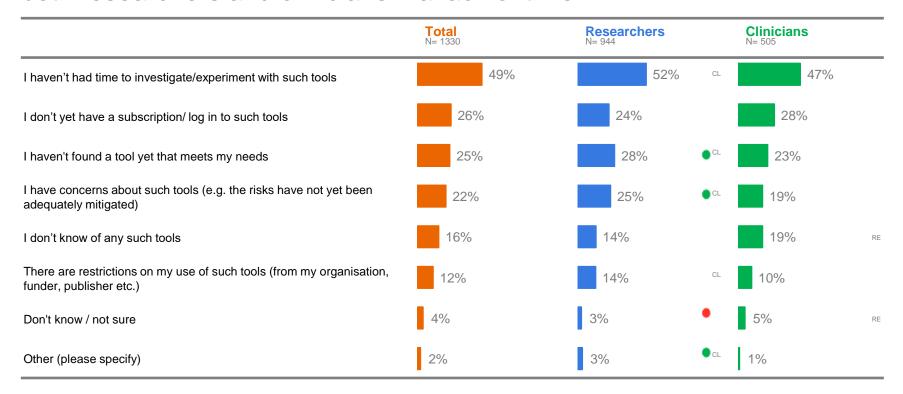
	% Selected
I haven't had time to investigate/experiment with such tools	49%
I don't yet have a subscription/ log in to such tools	26%
I haven't found a tool yet that meets my needs	25%
I have concerns about such tools (e.g. the risks have not yet been adequately mitigated)	22%
I don't know of any such tools	16%
There are restrictions on my use of such tools (from my organisation, funder, publisher etc.)	12%
Don't know / not sure	4%
Other (please specify)	2%





The most common reason for those who haven't used AI applies to both researchers and clinicians – a lack of time





Questions: Which of the following describes why you haven't used an AI product or AI feature?



Total

Lack of time is the main reason for those who haven't used AI, this is consistent across regions, North America more likely than other regions to have had concerns about Al tools



	Total N= 1330	Asia Pacific N= 373	Europe N= 450		North Ame N= 209	rica	South Am N= 192	erica	Middle East & Africa N= 84
I haven't had time to investigate/experiment with such tools	49%	49%	52°	% SA	54%	SA	38%	•	46%
I don't yet have a subscription/ log in to such tools	26%	27%	23%		20%		29%	EU NA	29%
I haven't found a tool yet that meets my needs	25%	30% • S	IU IA SA EA	SA MEA	22%	SA	15%	•	14%
I have concerns about such tools (e.g. the risks have not yet been adequately mitigated)	22%	21% S	SA 21%	SA MEA	36%	AP EU SA MEA	12%	•	11%
I don't know of any such tools	16%	12%	22%	• AP	19%	AP	18%	AP	18%
There are restrictions on my use of such tools (from my organisation, funder, publisher etc.)	12%	14%	9%		15%	EU SA	6%	•	9%
Don't know / not sure	4%	3%	4%		8%	• AP EU	5%		4%
Other (please specify)	2%	1%	2%		8%	AP EU SA MEA	2%		2%

Questions: Which of the following describes why you haven't used an AI product or AI feature?



Significantly higher/lower than...

Significantly higher than...

Total

The most common reason for those who haven't used AI is a lack of time, across the three most populous countries this is consistent but lower in India



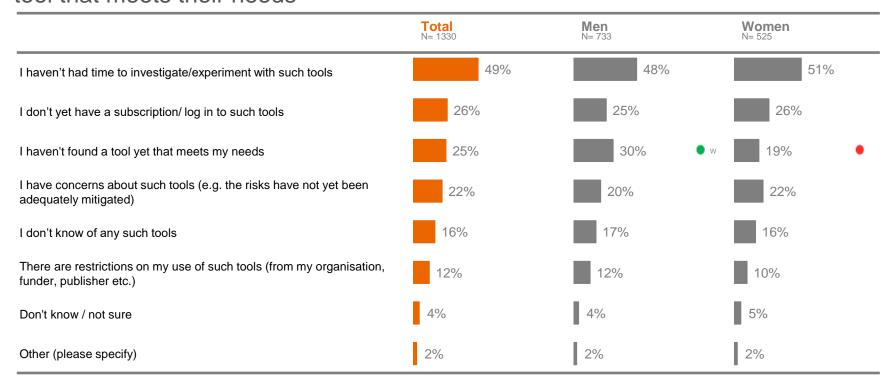
	Total N= 1330	USA N= 180	China N= 153	India N= 67
I haven't had time to investigate/experiment with such tools	49%	52%	IN 55%	IN 34%
I don't yet have a subscription/ log in to such tools	26%	22%	29%	26%
I haven't found a tool yet that meets my needs	25%	24%	33%	us 29%
I have concerns about such tools (e.g. the risks have not yet been adequately mitigated)	22%	39%	CH 23%	IN 11%
I don't know of any such tools	16%	19%	сн 6%	27% • сн
There are restrictions on my use of such tools (from my organisation, funder, publisher etc.)	12%	16%	18%	12%
Don't know / not sure	4%	8%	сн 3%	4%
Other (please specify)	2%	7%	CH 1%	0%

Questions: Which of the following describes why you haven't used an AI product or AI feature?



The most common reason for those who haven't used AI applies to both men and women – a lack of time. Men more likely to say they haven't found an Al tool that meets their needs





Questions: Which of the following describes why you haven't used an AI product or AI feature?



The most common reason for those not using AI – a lack of time, is consistent across all years active in role. Those active 36+ years are less likely to cite concerns about risks associated with use of such tools



	Total Years	20	6-10 N= 216	11-35 N= 701	36+ N= 126
I haven't had time to investigate/experiment with such tools	49%	44%	57% ● 11-35 36+	49%	48%
I don't yet have a subscription/ log in to such tools	26%	24%	23%	27%	25%
I haven't found a tool yet that meets my needs	25%	22%	27%	23%	23%
I have concerns about such tools (e.g. the risks have not yet been adequately mitigated)	22%	25% 36+	25% 36+	22% 36+	12%
I don't know of any such tools	16%	16%	18%	16%	16%
There are restrictions on my use of such tools (from my organisation, funder, publisher etc.)	12%	16% 11-35 36+	13%	10%	6%
Don't know / not sure	4%	3%	3%	4%	3%
Other (please specify)	2%	2%	3%	2%	2%

Questions: Which of the following describes why you haven't used an AI product or AI feature?





The most common reason for those who haven't used AI tools or features is consistent across country income levels – a lack of time



	Total N= 1330	High Income N= 661		Upper- Middle-Inc	ome	Lower- Middle-Ir N= 172	ncome
I haven't had time to investigate/experiment with such tools	49%	53%	• UM LM	48%		41%	•
I don't yet have a subscription/ log in to such tools	26%	21%	•	28%	НІ	31%	н
I haven't found a tool yet that meets my needs	25%	21%	•	28%	Н	27%	Н
I have concerns about such tools (e.g. the risks have not yet been adequately mitigated)	22%	26%	• UM LM	21%	LM	13%	•
I don't know of any such tools	16%	18%	UM	12%	•	20%	UM
There are restrictions on my use of such tools (from my organisation, funder, publisher etc.)	12%	12%		12%		10%	
Don't know / not sure	4%	5%		3%		5%	
Other (please specify)	2%	4%	• UM LM	1%		0%	•

Significantly higher/ lower than...

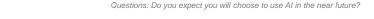
Questions: Which of the following describes why you haven't used an Al product or Al feature?



Around two-thirds of those who haven't used AI expect to use it within the next two to five years

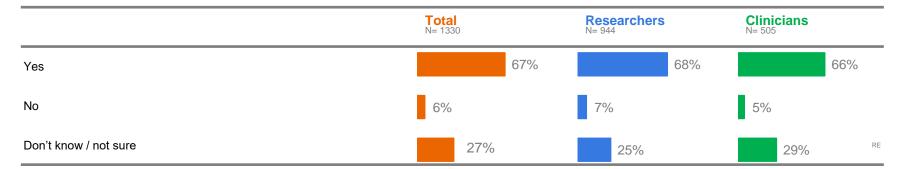


	% Selected
Yes	67%
No	6%
Don't know / not sure	27%



Around two-thirds of those who haven't used AI expect to use it within the next two to five years, similar levels across researchers and clinicians





Around two-thirds of those who haven't used AI expect to use it within the next two to five years. This is highest is MEA and lowest in North America

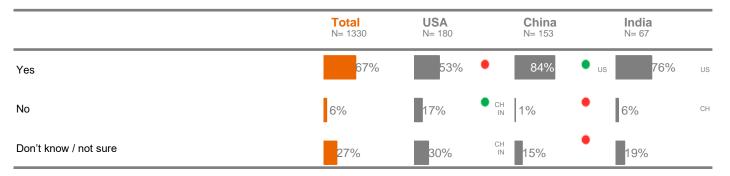


	Total N= 1330	Asia Pacific N= 373	;	Europe N= 450		North Am N= 209	erica	South Ame N= 192	rica	Middle East Africa N= 8	
Yes	67%	76%	● EU NA	55%	•	51%	•	72%	EU NA	81%	• EU NA
No	6%	3%	•	6%	AP	18%	AP EU SA MEA	4%		5%	
Don't know / not sure	27%	22%	•	39%	AP NA SA MEA	31%	AP MEA	25%	MEA	15%	•

Global

Around two-thirds of those who haven't used AI expect to use it within the next 2-5 years globally, but this figure is only around half in the USA



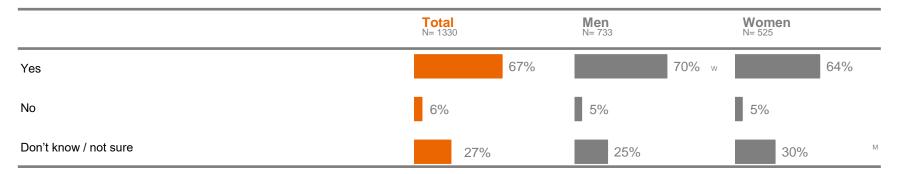


Questions: Do you expect you will choose to use Al in the near future?



Of those who haven't used it, women are less sure if they'll use it within the next two to five years



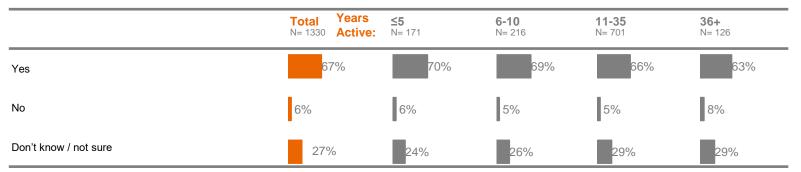


Questions: Do you expect you will choose to use AI in the near future?



Around two-thirds of those who haven't used AI expect to use it within the next two to five years, no notable difference by years active





Questions: Do you expect you will choose to use Al in the near future?

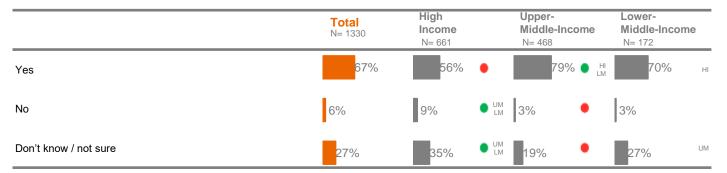




Global

Those in high income countries are the least likely to choose to use Al in the near future, of those who haven't already used it





Questions: Do you expect you will choose to use AI in the near future?



A third are unaware of restrictions on AI usage at their institution



	% Selected
Don't know / not sure	33%
Prohibited to upload confidential information into public generative AI platforms	27%
Lack of budget to pay for AI products or features	26%
Prohibited to use it for certain purposes	18%
None of the above	11%
Prohibited to use certain tools	10%
Other (please specify)	2%
Prohibited to use it in any way	2%

Clinicians are more likely than researchers to be unaware of restrictions on Al usage at their institution



	Total N= 2999	Researchers N= 2284	Clinicians N= 1007
Don't know / not sure	33%	31%	35% RE
Prohibited to upload confidential information into public generative Al platforms	27%	28%	27%
Lack of budget to pay for AI products or features	26%	25%	28% RE
Prohibited to use it for certain purposes	18%	19% CL	16%
None of the above	11%	13% • CL	9%
Prohibited to use certain tools	10%	11% CL	9%
Other (please specify)	2%	3% • cL	1%
Prohibited to use it in any way	2%	1%	2%

Questions: Which restrictions, if any, does your institution currently have with regards to AI usage?

Most don't know if their institution has restrictions in place on the use of AI, particularly in Europe and North America. Budget is the biggest restriction to use in South America and Middle East and Africa



	Total N= 2999	Asia Pacific N= 894	Europe N= 968		North Ame N= 450	erica	South Am N= 451	erica	Middle Eas Africa N= 1	
Don't know / not sure	33%	29%	40%	AP SA MEA	38%	AP SA MEA	28%	•	29%	
Prohibited to upload confidential information into public generative AI platforms	27%	33% • B	Α	SA MEA	28%	EU SA MEA	15%	•	12%	•
Lack of budget to pay for AI products or features	26%	28%	u 21%	•	19%	•	35%	AP EU NA	35%	AP EU NA
Prohibited to use it for certain purposes	18%	21%	u 13%	•	21%	eu sa	12%	•	18%	EU SA
None of the above	11%	9%	14%	• AP	11%		16%	AP NA	15%	AP
Prohibited to use certain tools	10%	11%	10%	SA	13%	EU SA MEA	7%	•	8%	
Other (please specify)	2%	1%	2%	AP MEA	3%	AP MEA	3%	AP MEA	0%	
Prohibited to use it in any way	2%	1%	2%	AP SA MEA	3%	AP SA MEA	1%	•	0%	

Questions: Which restrictions, if any, does your institution currently have with regards to AI usage?

Select: all that apply



Significantly higher/ lower than...
Significantly higher than...



Around a third don't know if their institution has restrictions in place on the use of AI, across the three most populous countries it is higher in the USA



	Total N= 2999	USA N= 393	China N= 358	India N= 134
Don't know / not sure	33%	38%	• CH 32%	_{IN} 24%
Prohibited to upload confidential information into public generative AI platforms	27%	27%	36%	• IN US 27%
Lack of budget to pay for AI products or features	26%	19%	23%	35% • CH
Prohibited to use it for certain purposes	18%	20%	26%	• IN 16%
None of the above	11%	11%	сн 7%	• 15% ch
Prohibited to use certain tools	10%	13%	16%	• IN 10%
Other (please specify)	2%	2%	сн 0%	• 2% CH
Prohibited to use it in any way	2%	4%	• сн 1%	2%

Questions: Which restrictions, if any, does your institution currently have with regards to AI usage? Select: all that apply



Significantly higher than.

Around a third don't know if their institution has restrictions in place on the use of AI, similar for men and women



	Total N= 2999	Men N= 1755	Women N= 1085
Don't know / not sure	33%	32%	34%
Prohibited to upload confidential information into public generative Al platforms	27%	26%	27%
Lack of budget to pay for AI products or features	26%	25%	27%
Prohibited to use it for certain purposes	18%	18%	18%
None of the above	11%	13% • w	9%
Prohibited to use certain tools	10%	10%	11%
Other (please specify)	2%	2%	1%
Prohibited to use it in any way	2%	2%	2%

Questions: Which restrictions, if any, does your institution currently have with regards to AI usage?



Around a third don't know if their institution has restrictions in place on the use of AI, higher for those who have been longest in their area of work



	Total Years N= 2999 Active:	≤5 N= 431		6-10 N= 541	11-35 N= 1565	36+ N= 215
Don't know / not sure	33%	29%		35% ≤5	31%	43% 6-10 11-35
Prohibited to upload confidential information into public generative AI platforms	27%	28%	36+	30% • 11-35	27% 36+	14%
Lack of budget to pay for AI products or features	26%	27%	36+	30% 11-35 36+	26% 36+	19%
Prohibited to use it for certain purposes	18%	19%	36+	20% 36+	19% 36+	9%
None of the above	11%	12%		9%	11%	20% 55 6-10 11-35
Prohibited to use certain tools	10%	10%	36+	14%	11%	4%
Other (please specify)	2%	0%		1%	3% ≤5 6-10	5% ≤5 6-10 11-35
Prohibited to use it in any way	2%	2%		1%	2%	1%

Questions: Which restrictions, if any, does your institution currently have with regards to AI usage?



Significantly higher/lower than...

Significantly higher than.

Lack of budget is the main reason for not having access to AI tools for over two fifths of those in lower-middle-income countries



	Total N= 2999	High Income N= 1533	Upper- Middle-Income N= 1050	Lower- Middle-Income N= 353
Don't know / not sure	33%	38% • UM	29%	27%
Prohibited to upload confidential information into public generative AI platforms	27%	26%	28%	26%
Lack of budget to pay for AI products or features	26%	19%	28% н	42% • HI
Prohibited to use it for certain purposes	18%	17% LM	21% • HI	12%
None of the above	11%	12%	10%	11%
Prohibited to use certain tools	10%	10% LM	13% • HI	6%
Other (please specify)	2%	3% • им	1%	1%
Prohibited to use it in any way	2%	2% UM	1%	1%

Questions: Which restrictions, if any, does your institution currently have with regards to AI usage?

Select: all that apply



Many are unsure how their institution is preparing for AI usage



1/2	% Selected
Don't know / not sure	44%
Building a plan/protocol to evaluate the purchase of tools that include it	16%
Setting up a community of practice around it	14%
Providing ethics courses	14%
None of the above	13%

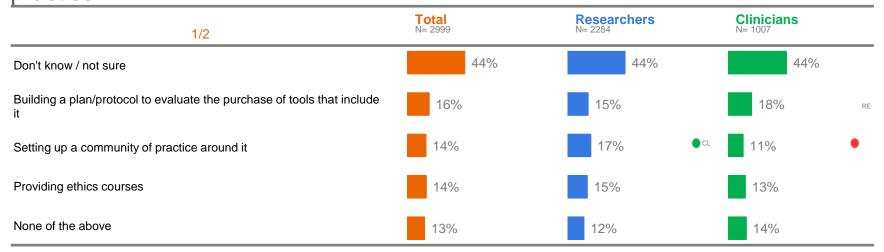
It is uncommon for institutions to be appointing new Al leadership



2/2	% Selected
Planning to acquire tools that include it (within 2024 or before)	12%
Adding a position around it to your documentation (e.g. annual plan, mission, charter etc.)	11%
Appointing new operational functions around it (e.g. GenAl Librarian etc.)	10%
Appointing new leadership around it (e.g. Chief Al Officer etc.)	6%
Other (please specify)	2%

Many are unsure how their institution is preparing for AI usage, more researchers than clinicians think their institutions are setting up community practice





Total

It is uncommon for institutions to be appointing new Al leadership; but more likely for researchers than for clinicians



2/2	Total N= 2999	Researchers N= 2284	Clinicians N= 1007
Planning to acquire tools that include it (within 2024 or before)	12%	13%	12%
Adding a position around it to your documentation (e.g. annual plan, mission, charter etc.)	11%	11%	12%
Appointing new operational functions around it (e.g. GenAl Librarian etc.)	10%	10%	10%
Appointing new leadership around it (e.g. Chief AI Officer etc.)	6%	7% • _{CL}	5%
Other (please specify)	2%	2%	1%

Total

Awareness of plans is lowest in Europe and North America (1/2)



1	Total /2 N= 2999	Asia Pacific N= 894	Euro N= 90		North Ame	erica	South Am	erica	Middle East Africa N= 19	
Don't know / not sure	44%	38%		54% • AP SA	52%	• AP SA MEA	36%	•	36%	•
Building a plan/protocol to evaluate the purchase of tools that include it	16%	22%	EU NA SA	%	12%	•	14%	EU	17%	EU NA
Setting up a community of practice around it	14%	18%	SA 11	% • SA	17%	EU SA	8%	•	12%	SA
Providing ethics courses	14%	18%	EU NA SA	%	13%	EU	11%	EU	20%	EU NA SA
None of the above	13%	9%	15	5% • AP	11%		21%	AP EU NA MEA	14%	AP

Awareness of plans is lowest in Europe and North America (2/2)



	Total 2/2 N= 2999	Asia Pacific N= 894	Europe N= 968		North America N= 450	South America N= 451	Middle East & Africa N= 193	
Planning to acquire tools that include it (within 2024 or before)	12%	14% EU SA	10%	•	12%	9%	15%	EU SA
Adding a position around it to your documentation (e.g. annual plan, mission, charter etc.)	11%	16% EU NA SA MEA	6%	•	9% EU	8%	11%	EU
Appointing new operational functions around it (e.g. GenAl Librarian etc.)	10%	14% • EU NA SA MEA	6%	•	9% EU	4%	7%	
Appointing new leadership around it (e.g. Chief Al Officer etc.)	6%	7% EU SA	4%	•	7% EU SA	3%	8%	EU SA
Other (please specify)	2%	1%	2%	AP	4% AP EU MEA	4% AP	1 70	

Questions: In which ways, if any, is your institution preparing for AI usage?

Select: all that apply

Those in the USA are more likely to be unsure how their institution is preparing, though this is the most common answer across the three most populous countries



1/2	Total N= 2999	USA N= 393	China N= 358	India N= 134	
Don't know / not sure	44%	53%	CH 37%	933%	•
Building a plan/protocol to evaluate the purchase of tools that include it	16%	13%	25%	us 24%	US
Setting up a community of practice around it	14%	16%	14%	22%	СН
Providing ethics courses	14%	13%	20%	us 14%	
None of the above	13%	10%	^{CH} 6%	15%	СН



It is uncommon for institutions to be appointing new AI operational functions but more likely in China



2/2	Total N= 2999	USA N= 393	China N= 358	India N= 134
Planning to acquire tools that include it (within 2024 or before)	12%	13%	15%	15%
Adding a position around it to your documentation (e.g. annual plan, mission, charter etc.)	11%	8%	21%	• US 9%
Appointing new operational functions around it (e.g. GenAl Librarian etc.)	10%	9%	18%	• us 11%
Appointing new leadership around it (e.g. Chief Al Officer etc.)	6%	8%	5%	9% • сн
Other (please specify)	2%	4%	● ^{CH} 0%	2% CH

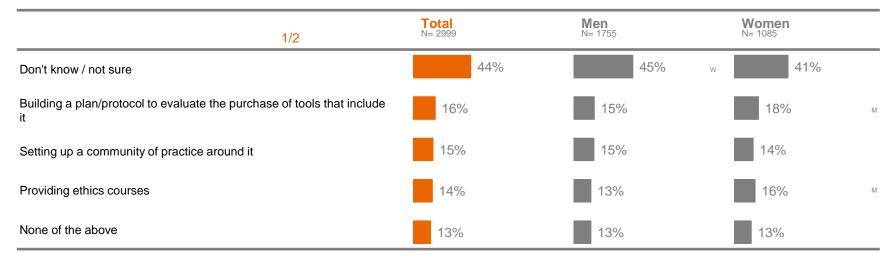
Questions: In which ways, if any, is your institution preparing for AI usage?

Select: all that apply

Total

Many are not aware of institutional plans to prepare for AI this is generally consistent across men and women







It is uncommon for institutions to be appointing new AI operational functions; but more likely for women to be aware of this than men



2/2	Total N= 2999	Men N= 1755	Women N= 1085
Planning to acquire tools that include it (within 2024 or before)	12%	13%	12%
Adding a position around it to your documentation (e.g. annual plan, mission, charter etc.)	11%	11%	12%
Appointing new operational functions around it (e.g. GenAl Librarian etc.)	10%	8%	12%
Appointing new leadership around it (e.g. Chief AI Officer etc.)	6%	6%	5%
Other (please specify)	2%	1%	2%

Questions: In which ways, if any, is your institution preparing for AI usage?



Those with over 35 years' experience in their area of work are more likely to be unsure how their institution is preparing for Al usage, though this is the most common answer for all groups



	1/2	Total N= 2999	Years Active:	≤5 N= 431		6-10 N= 541		11-35 N= 1565		36+ N= 215	
Don't know / not sure		449	%	40%		45%		42%		51%	≤5 11-35
Building a plan/protocol to evaluate the ptools that include it	ourchase of	16%		17%	36+	15%		18%	6-10 36+	10%	•
Setting up a community of practice around	nd it	14%		11%	•	15%	≤5	17%	≤5	13%	
Providing ethics courses		14%		14%		15%		15%	36+	11%	
None of the above		13%		14%		12%		13%		16%	

Questions: In which ways, if any, is your institution preparing for AI usage?





It is uncommon for institutions to be appointing new Al leadership; but more likely for those with 6-10 years' experience to be aware of this



2/2	Total Years N= 2999 Active:	≤5 N= 431	6-10 N= 541	11-35 N= 1565	36+ N= 215
Planning to acquire tools that include it (within 2024 or before)	12%	13%	12%	13%	11%
Adding a position around it to your documentation (e.g. annual plan, mission, charter etc.)	11%	11% 36+	13% 36+	11% 36+	5%
Appointing new operational functions around it (e.g. GenAl Librarian etc.)	10%	12% 36+	11% 36+	10% 36+	3%
Appointing new leadership around it (e.g. Chief Al Officer etc.)	6%	5%	8% 11-35 36+	5%	4%
Other (please specify)	2%	1%	2%	2%	2%

Those in high income markets are the least aware of how their institution is preparing for AI usage (1/2)



1/2	Total N= 2999	High Income N= 1533	Upper- Middle-Inc N= 1050	come Mido N= 35	dle-Income
Don't know / not sure	44%	52%	UM 35%	• 38	8%
Building a plan/protocol to evaluate the purchase of tools that include it	16%	11%	22%	• н 19%	, 0 НІ
Setting up a community of practice around it	14%	15%	14%	16%	
Providing ethics courses	14%	12%	18%	• HI 12%	
None of the above	13%	13%	11%	17%	HI UM

Questions: In which ways, if any, is your institution preparing for AI usage?



Those in high income markets are the least aware of how their institution is preparing for AI usage (2/2)



2/2	Total N= 2999	High Income N= 1533	Upper- Middle-Income N= 1050	Lower- Middle-Income N= 353
Planning to acquire tools that include it (within 2024 or before)	12%	11%	14%	13%
Adding a position around it to your documentation (e.g. annual plan, mission, charter etc.)	11%	7%	15% • н	13% ні
Appointing new operational functions around it (e.g. GenAl Librarian etc.)	10%	7%	14% • H	8%
Appointing new leadership around it (e.g. Chief Al Officer etc.)	6%	5%	5%	8% • HI
Other (please specify)	2%	2%	1%	1%

Questions: In which ways, if any, is your institution preparing for AI usage?





3. Perceptions of Al

Theme 3



Perceptions of Al

What are your overall feelings about the impact of AI on your area of work?	Slide 70
What do you think will be the level of impact of AI in your area of work in the near future?	Slide 77
To what extent, if at all, do you have concerns about the ethical implications of AI in your area of work?	Slide 84
You mentioned that you had concerns, what do you think are the top 3 disadvantages of AI?	Slide 91
Thinking about the impact AI will have on society and your work, to what extent do you think over the next 2 to 5 years it will?	Slide 108
Thinking about the use of generative AI in your area of work, how much do you agree or disagree with the following?	Slide 122
To what extent, if at all, would the following factors increase your trust in tools that utilize generative AI?	Slide 129
Which information areas about a tool's dependency on generative AI would most increase your comfort in using that tool?	Slide 136
Would you prefer any generative AI functionality included in a product you use already to be?	Slide 149



A third are positive about the impact of AI on their area of work, nearly half have mixed feelings and very few are negative



	% Selected		
Positive – it's a welcome advancement	36%		
Mixed - I can see both potential and drawbacks	49%		
Unsure – I need to see how this develops	13%		
Negative – I see mostly drawbacks	1%		

Questions: What are your overall feelings about the impact of AI on your area of work?

Researchers are more likely to feel positive about AI than clinicians, who are more likely to feel unsure



	Total N= 2999	Researchers N= 2284	ers Clinicians N= 1007		
Positive – it's a welcome advancement	36%	41%	● CL	32%	•
Mixed - I can see both potential and drawbacks	49%	48%		50%	
Unsure – I need to see how this develops	13%	10%	•	17%	● RE
Negative – I see mostly drawbacks	1%	1%		1%	

Most have mixed feelings about the impact of AI on their work, those in Europe and North America are less positive



	Total N= 2999	Asia Pacific N= 894	Europe N= 968	North America N= 450	South America N= 451	Middle East & Africa N= 193
Positive – it's a welcome advancement	36%	40% • EU	31%	28%	39% EU	39% EU
Mixed - I can see both potential and drawbacks	49%	47% MEA	51% A	56% SA	50% MEA	39%
Unsure – I need to see how this develops	13%	13%	16% • AN	11%	10%	17% AP NA SA
Negative – I see mostly drawbacks	1%	0%	1%	5% PAPEU SA	1% AP	4% AP EU SA

Questions: What are your overall feelings about the impact of Al on your area of work?



Those in the USA are more likely to feel mixed or negative than globally about the impact of AI on their area of work



	Total N= 2999	USA N= 393	China N= 358	India N= 134
Positive – it's a welcome advancement	36%	28%	46% • us	41% us
Mixed - I can see both potential and drawbacks	49%	56% • CH	39%	45%
Unsure – I need to see how this develops	13%	11%	14%	13%
Negative – I see mostly drawbacks	1%	5% CH IN	0%	1%

Questions: What are your overall feelings about the impact of AI on your area of work?



Men are more likely to feel positive about AI than women, who are more likely to feel mixed or unsure



	Total N= 2999	Men N= 1755	Women N= 1085
Positive – it's a welcome advancement	36%	45%	• w 27% •
Mixed - I can see both potential and drawbacks	49%	44%	• 54% • м
Unsure – I need to see how this develops	13%	10%	• 17% • M
Negative – I see mostly drawbacks	1%	1%	1%

As years active in their area of work increases, so too does the proportion who feel unsure about AI



	Total N= 2999	Years Active:	≤5 N= 431		6-10 N= 541	11-35 N= 1565		36+ N= 215	
Positive – it's a welcome advancement	36%		40%	36+	38%	36%		33%	
Mixed - I can see both potential and drawbacks	49%	/o	49%		50%	48%		48%	
Unsure – I need to see how this develops	13%		10%	•	11%	15%	≤5 6-10	18%	≤5 6-10
Negative – I see mostly drawbacks	1%		1%		1%	1%		1%	

Upper-middle-income countries are most likely to feel positive about Al



Base: n= 2999

	Total N= 2999	High Income N= 1533		Upper- Middle-Income N= 1050		Lower- Middle-Income N= 353	
Positive – it's a welcome advancement	36%	33%	•	41%	• HI	33%	
Mixed - I can see both potential and drawbacks	49%	53%	• um	43%	•	53%	UM
Unsure – I need to see how this develops	13%	12%		15%	Н	13%	
Negative – I see mostly drawbacks	1%	2%	• UM	1%	•	1%	

Questions: What are your overall feelings about the impact of Al on your area of work?



Significantly higher/lower than...

Nearly three quarters think the impact of AI on their area of work will be transformative or significant

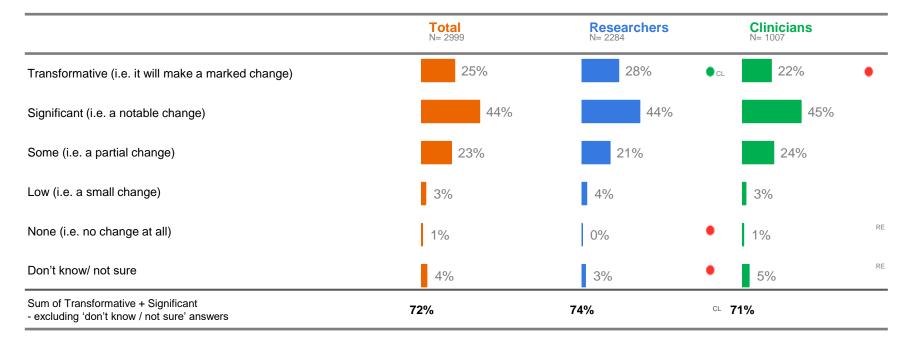


	% Selected
Transformative (i.e. it will make a marked change)	25%
Significant (i.e. a notable change)	44%
Some (i.e. a partial change)	23%
Low (i.e. a small change)	3%
None (i.e. no change at all)	1%
Don't know/ not sure	4%
Sum of Transformative + Significant - excluding 'don't know / not sure' answers	72%



Researchers are more likely to think AI will be transformative than clinicians





Questions: What do you think will be the level of impact of AI in your area of work in the near future?



Clinicians

Those in APAC are most likely to think AI will be transformative, Europe least likely



	Total N= 2999	Asia Pacific N= 894	Europe N= 968		North Am N= 450	nerica	South Amo	erica	Middle Eas Africa N= 1	
Transformative (i.e. it will make a marked change)	25%	31% • ^E _N	17%	•	24%	EU	22%	EU	26%	EU
Significant (i.e. a notable change)	44%	43%	46%	NA	38%	•	52%	e AP EU NA	51%	• AP
Some (i.e. a partial change)	23%	22% ME	27%	AP SA MEA	26%	AP SA MEA	18%	MEA	11%	•
Low (i.e. a small change)	3%	2%	5%	• AP SA	5%	• AP SA	2%		3%	
None (i.e. no change at all)	1%	0%	1%	AP	1%	AP	1%	AP	3%	AP NA SA
Don't know/ not sure	4%	3%	4%		6%	• AP EU	5%		6%	AP EU
Sum of Transformative + Significant - excluding 'don't know / not sure' answers	72%	76% • EL	65%	•	66%	•	78%	● EU NA	82%	AP EU NA

Questions: What do you think will be the level of impact of Al in your area of work in the near future?



Global

Those in China are most likely to think the impact will be transformative. Those in the USA are less likely to think it will be significant or transformative



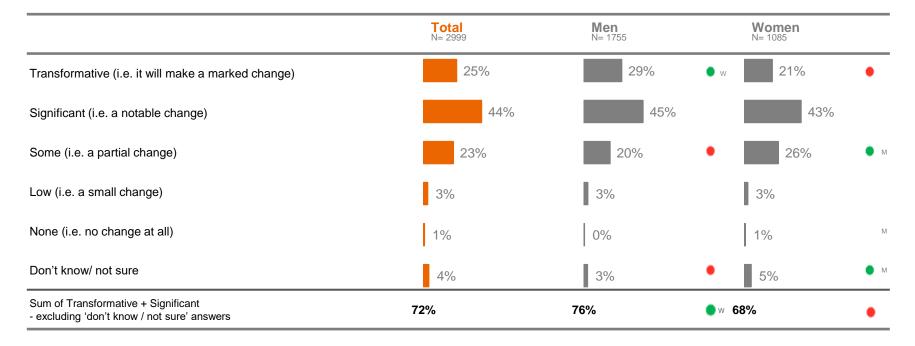
	Total N= 2999	USA N= 393	China N= 358	India N= 134	
Transformative (i.e. it will make a marked change)	25%	24%	34%	• US 31%	US
Significant (i.e. a notable change)	44%	38%	38 %	50%	CH
Some (i.e. a partial change)	23%	26%	_{IN} 26%	_{IN} 12%	•
Low (i.e. a small change)	3%	5%	● cH 1%	• 3%	СН
None (i.e. no change at all)	1%	1%	сн 0%	0%	
Don't know/ not sure	4%	6%	сн 2%	• 4%	
Sum of Transformative + Significant - excluding 'don't know / not sure' answers	72%	66%	• 73%	us 84%	OH US

Questions: What do you think will be the level of impact of Al in your area of work in the near future?



Men are more likely to think AI will be transformative than women





Questions: What do you think will be the level of impact of AI in your area of work in the near future?

Total

Those with over 36 years' experience in their area of work are least likely to think it will be transformative



	Total N= 2999	Years Active:	≤5 N= 431		6-10 N= 541		11-35 N= 1565		36+ N= 215	
Transformative (i.e. it will make a marked change)	25%		28%	36+	26%	36+	25%	36+	19%	•
Significant (i.e. a notable change)	44%	,	44%		44%		45%		44%	
Some (i.e. a partial change)	23%		22%		21%		22%		28%	≤5 6-10 11-35
Low (i.e. a small change)	3%		3%		3%		3%		5%	
None (i.e. no change at all)	1%		1%		1%		0%		1%	
Don't know/ not sure	4%		3%		5%		4%		3%	
Sum of Transformative + Significant - excluding 'don't know / not sure' answers	72%	36+	74%	36+ 7	' 4%	36+	73%	36+	65%	•

Questions: What do you think will be the level of impact of AI in your area of work in the near future?



Global

Those in lower-middle-income countries are most likely to think the use of AI will be transformative or significant in their area of work



Base: n= 2999

	Total N= 2999	High Income N= 1533		Upper- Middle-In N= 1050	come	Lower- Middle-Ir N= 353	ncome
Transformative (i.e. it will make a marked change)	25%	22%	•	26%	НІ	32%	• HI UM
Significant (i.e. a notable change)	44%	43%		44%		47%	
Some (i.e. a partial change)	23%	24%	LM	25%	LM	12%	•
Low (i.e. a small change)	3%	4%	• UM LM	2%	•	2%	
None (i.e. no change at all)	1%	1%	UM	0%	•	0%	
Don't know/ not sure	4%	4%	UM	3%	•	7%	• HI UM
Sum of Transformative + Significant - excluding 'don't know / not sure' answers	72%	69%	•	72%	Н	85%	● UM

Questions: What do you think will be the level of impact of AI in your area of work in the near future?



Most have at least some concerns about the ethical implications of AI in their area of work, only 1 in 10 have no concerns



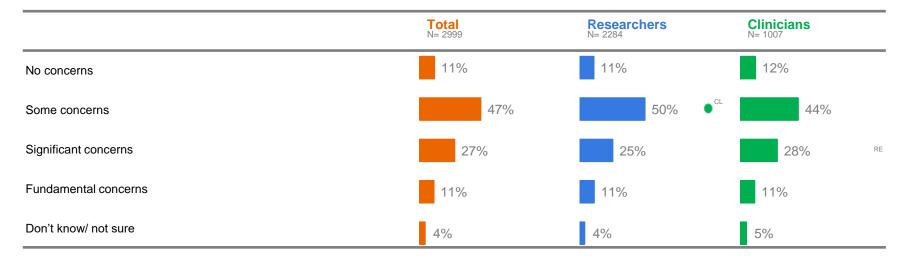
Base: n= 2999

	% Selected
No concerns	11%
Some concerns	47%
Significant concerns	27%
Fundamental concerns	11%
Don't know/ not sure	4%

Total

Only 1 in 10 have no concerns about the ethical implications of AI on their area of work – little meaningful differences between researchers and clinicians





Most have at least some concerns about AI, those in Europe have most significant or fundamental concerns



	Total N= 2999	Asia Pacific N= 894	Europe N= 968	North America N= 450	South America N= 451	Middle East & Africa N= 193
No concerns	11%	13% • BU NA MEA	9%	9%	11%	8%
Some concerns	47%	56% • RA NA SA MEA		44%	38% •	42%
Significant concerns	27%	22%	34%	AP NA 29%	_P 31% • _{AF}	27%
Fundamental concerns	11%	6%	17%	AP 14%	P 16% • AF	13% AP
Don't know/ not sure	4%	4%	4%	4%	4%	11% AP EU NA SA



Those in the USA are more likely to have fundamental concerns about the ethical implications of AI on their area of work

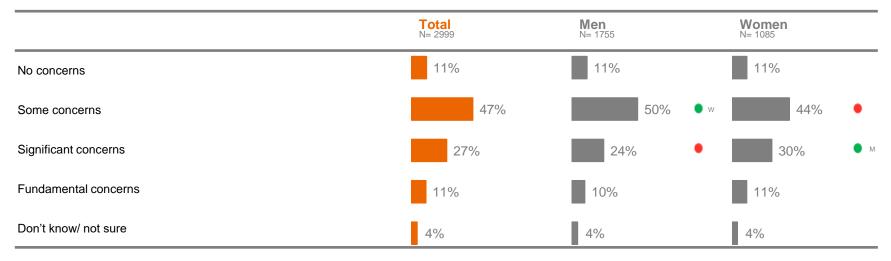


	Total N= 2999	USA N= 393	China N= 358	India N= 134
No concerns	11%	9%	19% IN	11%
Some concerns	47%	42%	65% IN US	40%
Significant concerns	27%	30% сн	10%	36% • сн
Fundamental concerns	11%	15% CH	3%	9% сн
Don't know/ not sure	4%	4%	3%	4%



Women are more likely to have significant concerns about the ethical implications of AI on their area of work







Those who have been in their area of work for 6-10 years are less likely to have any concerns about the ethical implications of AI in their area



	Total Years N= 2999 Active:	≤5 N= 431	6-10 N= 541	11-35 N= 1565	36+ N= 215
No concerns	11%	13% 11-35	14%	9%	13% 11-35
Some concerns	47%	48%	53% •1-35 36+	45%	41%
Significant concerns	27%	26% 6-10	20%	29% 6-10	32% 55 6-10
Fundamental concerns	11%	11%	9%	12%	11%
Don't know/ not sure	4%	3%	4%	5% ≤5	3%

Questions: To what extent, if at all, do you have concerns about the ethical implications of Al in your area of work?



Total

Those from upper-middle-income countries are most likely to not have concerns around AI use in their area of work



	Total N= 2999	High Income N= 1533		Upper- Middle-Inc N= 1050	ome	Lower- Middle-Ind N= 353	come
No concerns	11%	7%	•	17%	• HI	11%	НІ
Some concerns	47%	44%	•	53%	• HI	40%	•
Significant concerns	27%	31%	• um	19%	•	32%	• UM
Fundamental concerns	11%	14%	● UM LM	8%	•	9%	
Don't know/ not sure	4%	4%		3%		8%	• HI UM





The most selected top three disadvantage of AI is its inability to replace human creativity, judgement and/or empathy



1/2	% Selected
Unable to replace human creativity, judgment and/or empathy	42%
Does not have enough regulation or governance	40%
Lack of accountability over the use of generative AI outputs	30%
Outputs can be discriminatory or biased	24%
Too dependent on outdated data and/or information	19%
Outputs are factually incorrect and/or non-sensical (hallucinations)	18%
Lack of relevant expertise within organisation	19%
Risks homogenizing culture via its use of global models	18%
The logic behind an output is not well described	17%



Few cite discrimination against non-English speakers as a top disadvantage as a top-three disadvantage



2/2	% Selected
The logic behind an output is not well described	17%
Lack of permission to use data or information AI tools are trained on	14%
Generative AI inputs/prompts are not confidential	13%
Generative Al outputs are not confidential	11%
Requires a lot of computer processing power	9%
Generative AI discriminates against non-native English speakers	7%
Other	2%
Don't know/ not sure	1%
None of the above	0%



The most common disadvantage of AI for those who have concerns is that AI is unable to replace humans - this is higher for clinicians, for researchers it is tied with lack of regulation or governance



1/2	Total N= 2561	Researchers N= 1963	Clinicians N= 861
Unable to replace human creativity, judgment and/or empathy	42%	39%	45% • RE
Does not have enough regulation or governance	40%	39%	41%
Lack of accountability over the use of generative AI outputs	30%	32%	^{CL} 29%
Outputs can be discriminatory or biased	24%	25%	23%
Too dependent on outdated data and/or information	19%	21%	^{CL} 17%
Outputs are factually incorrect and/or non-sensical (hallucinations)	18%	25%	^{CL} 11%
Lack of relevant expertise within organisation	19%	15%	23% • RE
Risks homogenizing culture via its use of global models	18%	17%	18%
The logic behind an output is not well described	17%	20%	14% •

Questions: You mentioned that you had concerns, what do you think are the top 3 disadvantages of AI?

Total

A greater proportion of clinicians who have concerns about AI cite lack of confidentiality of inputs/prompts than researchers as a top disadvantage



Select: up to three

Base: n= 2561

2/2	Total N= 2561	Researchers N= 1963	Clinicians N= 861
Lack of permission to use data or information AI tools are trained on	14%	14%	15%
Generative Al inputs/prompts are not confidential	13%	12%	14% RE
Generative Al outputs are not confidential	11%	10%	11%
Requires a lot of computer processing power	9%	8%	10%
Generative AI discriminates against non-native English speakers	7%	7%	7%
Other	2%	2 %	1%
Don't know/ not sure	1%	1%	1%
None of the above	0%	0%	0%

Questions: You mentioned that you had concerns, what do you think are the top 3 disadvantages of AI?

Those in North America with concerns about AI believe its inability to replace human judgement and empathy is its greatest drawback. Europeans are most concerned about governance (1/2)



1/2	Total N= 2561	Asia Pacific N= 750	Europe N= 837	North America N= 397	South America N= 388	Middle East & Africa N= 158
Unable to replace human creativity, judgment and/or empathy	42%	38%	44% AP	45% AP	44% AP	51% • ^{AP} EU
Does not have enough regulation or governance	40%	37%	45% • NA MEA	39%	45% MEA	33%
Lack of accountability over the use of generative AI outputs	30%	31%	29%	34% EU	32%	27%
Outputs can be discriminatory or biased	24%	20%	30% • AP	31% • MEA	26%	23%
Too dependent on outdated data and/or information	19%	23% EU NA SA MEA	16%	15%	14%	16%
Outputs are factually incorrect and/or non-sensical (hallucinations)	18%	20% SA MEA	18% SA MEA	31% eu sa MEA	7%	9%
Lack of relevant expertise within organisation	19%	18%	20% NA	14%	22% • AP	20% NA
Risks homogenizing culture via its use of global models	18%	16%	21% PAP NA MEA	14%	25% P EU NA MEA	11%
The logic behind an output is not well described	17%	18% _{SA}	18% sa	15% SA	11%	17% sa

Global

Questions: You mentioned that you had concerns, what do you think are the top 3 disadvantages of AI? Select: up to three



Those in North America with concerns about AI believe its inability to replace human judgement and empathy is its greatest drawback. Those in the Middle East and Africa are more concerned than other regions about confidentiality of outputs and discrimination against non-native English speakers (2/2)



2	Total /2 N= 2561	Asia Pacific N= 750	Europe N= 837	North America N= 397	South America N= 388	Middle East & Africa N= 158
Lack of permission to use data or information AI tools are trained on	14%	15% sA	13%	15%	11%	17% sa
Generative Al inputs/prompts are not confidential	13%	15% EL NA MEA	11%	9%	12%	10%
Generative AI outputs are not confidential	11%	12% EL	8%	7%	9%	16% • EU NA SA
Requires a lot of computer processing power	9%	10%	8%	8%	8%	10%
Generative AI discriminates against non-native English speakers	7%	8% EL	5%	3%	6%	11% • BU NA SA
Other	2%	2%	1%	2%	2%	0%
Don't know/ not sure	1%	1%	1%	2%	2% EU MEA	0%
None of the above	0%	0%	0%	0%	1% AP	1% AP

Global

Questions: You mentioned that you had concerns, what do you think are the top 3 disadvantages of AI?

Select: up to three



The most common disadvantage of AI is its inability to replace human qualities, this is a much stronger concern for those in India (1/3)



1/3	Total N= 2561	USA N= 347	China N= 282	India N= 112
Unable to replace human creativity, judgment and/or empathy	42%	46%	сн 37%	57% • ^{CH}
Does not have enough regulation or governance	40%	37%	37%	38%
Lack of accountability over the use of generative Al outputs	30%	34%	30%	35%
Outputs can be discriminatory or biased	24%	31%	CH 16%	21%
Too dependent on outdated data and/or information	19%	16%	27%	IN 10%
Outputs are factually incorrect and/or non-sensical (hallucinations)	18%	32%	CH 18%	IN 9%

Questions: You mentioned that you had concerns, what do you think are the top 3 disadvantages of AI? Select: up to three

The most common disadvantage of AI is its inability to replace human qualities, most felt among those in India (2/3)



2/3	3	Total N= 2561	USA N= 347	China N= 282	India N= 112	-
Lack of relevant expertise within organisation		19%	12%	11%	• 22% CF	
Risks homogenizing culture via its use of global	models	18%	14%	20%	us 14%	
The logic behind an output is not well described		17%	16%	17%	12%	
Lack of permission to use data or information Al trained on	tools are	14%	14%	16%	13%	
Generative Al inputs/prompts are not confidential	al	13%	8%	18%	• IN US 8%	
Generative Al outputs are not confidential		11%	7%	15%	us 12%	



The most common disadvantage of AI is its inability to replace human qualities, most felt among those in India (3/3)

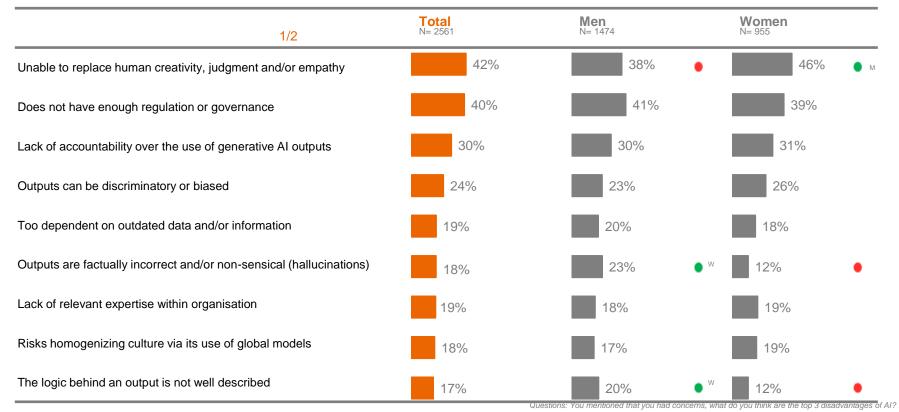


3/3	Total N= 2561	USA N= 347	China N= 282	India N= 112
Requires a lot of computer processing power	9%	8%	9%	11%
Generative AI discriminates against non-native English speakers	7%	4%	8% us	4%
Other	2%	2%	1%	1%
Don't know/ not sure	1%	2%	1%	3%
None of the above	0%	0%	0%	0%

Global

The most common disadvantage of AI for women is its inability to replace human qualities, for men it is the lack of regulation





Significantly higher/ lower than...
Significantly higher than...
Back to home

Globa

Select: up to three Base: n= 2561

A greater proportion of women cite lack of confidentiality of inputs/prompts than men as one of the top disadvantages



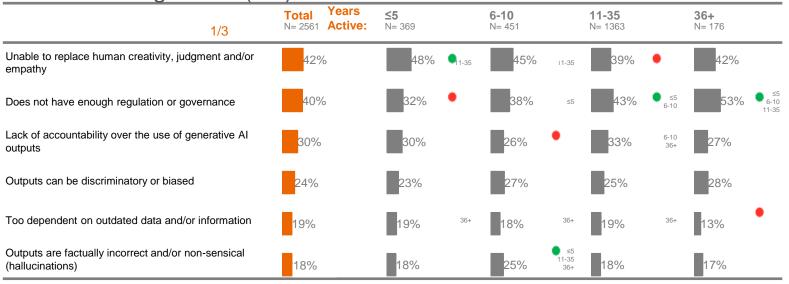
2/2	Total N= 2561	Men N= 1474	Women N= 955	
Lack of permission to use data or information AI tools are trained on	14%	15%	14%	
Generative Al inputs/prompts are not confidential	13%	12%	14%	М
Generative AI outputs are not confidential	11%	10%	11%	
Requires a lot of computer processing power	9%	8%	11%	М
Generative AI discriminates against non-native English speakers	7%	6%	7%	
Other	2%	2%	1%	
Don't know/ not sure	1%	2%	w 1%	•
None of the above	0%	0%	0%	

Questions: You mentioned that you had concerns, what do you think are the top 3 disadvantages of AI?



The most common disadvantage of AI for those active up to 10 years in their area of work is its inability to replace human qualities, for those with 11+, it is the lack of regulation (1/3)





Questions: You mentioned that you had concerns, what do you think are the top 3 disadvantages of AI?



Significantly higher than ...

The most common disadvantage of AI for those active up to 10 years in their area of work is its inability to replace human qualities, for those with 11+, it is the lack of regulation. Those 36+ are more concerned than others about homogenising culture (2/3)



2/3	Total N= 2561	Years Active:	≤5 N= 369		6-10 N= 451		11-35 N= 1363		36+ N= 176	
Lack of relevant expertise within organisation	19%		17%		18%		20%		17%	
Risks homogenizing culture via its use of global models	18%		16%		15%		18%	6-10	27%	≤5 6-10 11-35
The logic behind an output is not well described	17%		16%		17%		17%		18%	
Lack of permission to use data or information AI tools are trained on	14%		16%	6-10 36+	11%	•	15%	6-10 36+	10%	•
Generative Al inputs/prompts are not confidential	13%		16%	11-35 36+	15%	11-35 36+	12%	36+	6%	•
Generative Al outputs are not confidential	11%		13%		10%		10%		8%	

Questions: You mentioned that you had concerns, what do you think are the top 3 disadvantages of AI?



Significantly higher than.

The most common disadvantage of AI for those active up to 10 years in their area of work is its inability to replace human qualities, for those with 11+, it is the lack of regulation (3/3)



3/3	Total Years N= 2561 Active:	≤5 N= 369	6-10 N= 451	11-35 N= 1363	36+ N= 176
Requires a lot of computer processing power	9%	11%	10%	9%	7%
Generative AI discriminates against non-native English speakers	7%	6%	5%	7%	6%
Other	2%	1%	1%	1%	3% ≤5 11-35
Don't know/ not sure	1%	1%	2%	1%	4% ≤5 6-10 11-35
None of the above	0%	0%	1% • 55 11-35	0%	0%

Questions: You mentioned that you had concerns, what do you think are the top 3 disadvantages of AI?







The main worry to lower-middle-income countries is that AI is not able to replace creativity or empathy, in high income markets, governance is the greatest concern (1/3)



1/3	Total N= 2561	High Income N= 1369	Upper- Middle-Incom N= 857	e Middle-Income N= 291
Unable to replace human creativity, judgment and/or empathy	42%	41%	39%	49% • HI
Does not have enough regulation or governance	40%	44%	UM 38%	ы 32% ●
Lack of accountability over the use of generative Al outputs	30%	31%	29%	32%
Outputs can be discriminatory or biased	24%	29%	UM 20%	19%
Too dependent on outdated data and/or information	19%	16%	24%	HI 15%
Outputs are factually incorrect and/or non-sensical (hallucinations)	18%	25%	um 14%	LM 10%

Questions: You mentioned that you had concerns, what do you think are the top 3 disadvantages of AI?



Total

The main worry to lower-middle-income countries is that AI is not able to replace creativity or empathy, lack of expertise is more of a concern than other regions. In high income markets, governance is the greatest concern (2/3)



2/3	Total N= 2561	High Income N= 1369	Upper- Middle-Income N= 857	Lower- Middle-Income N= 291
Lack of relevant expertise within organization	19%	17%	16%	29% • HI
Risks homogenizing culture via its use of global models	18%	16%	22%	HI 13%
The logic behind an output is not well described	17%	19%	^{UM} 15%	11% •
Lack of permission to use data or information AI tools are trained on	14%	14%	14%	14%
Generative Al inputs/prompts are not confidential	13%	12%	14%	12%
Generative Al outputs are not confidential	11%	8%	12%	н 16% • н

Questions: You mentioned that you had concerns, what do you think are the top 3 disadvantages of AI?



The main worry to lower-middle-income countries is that AI is not able to replace creativity or empathy, lack of expertise and demands on computer processing power are greater concerns than other regions. In high income markets, governance is the greatest concern (3/3)



Base: n= 2561

3/3	Total N= 2561	High Income N= 1369	Upper- Middle-Incon N= 857	Lower- ne Middle-Inco	ome
Requires a lot of computer processing power	9%	7%	11%	н 13%	• ні
Generative AI discriminates against non-native English speakers	7%	5%	8%	н 6%	
Other	2%	2%	∪м 1%	3%	UM
Don't know/ not sure	1%	1%	1%	1%	
None of the above	0%	0%	0%	1%	

Questions: You mentioned that you had concerns, what do you think are the top 3 disadvantages of AI?

Significantly higher/lower than...

Al is anticipated to have positive impact in many areas. Most think Al will help accelerate knowledge discovery



1/2 - Positive Impacts	% Not at all/At	least to some extent
Change the way students are taught and study in unis and medical school	ols 4%	96%
Accelerate knowledge discovery	5%	95%
Rapidly increase the volume of scholarly and medical research	6%	94%
Increase your work efficiency	8%	92%
Provide cost savings to institutions and businesses	8%	92%
Increase your work quality	13%	87%
Free your time for higher value work	15%	85%
Increase your work consistency	17%	83%
Increase collaboration	21%	79%



But there are also negative impacts of AI - most think AI could be used for misinformation



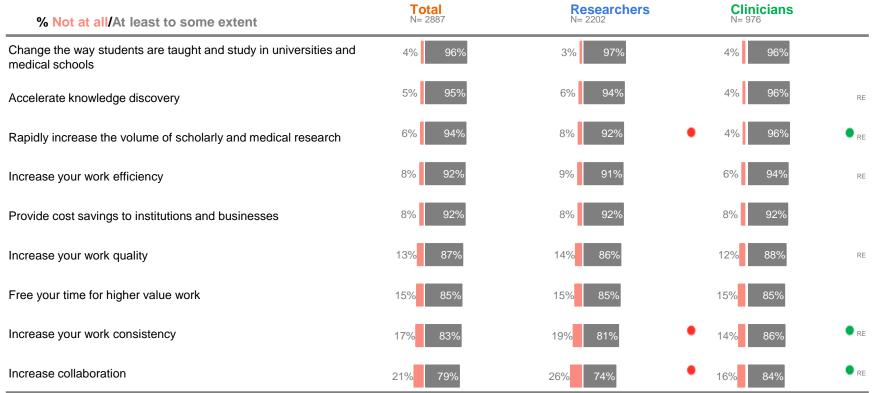
2/2 - Negative Impacts	% Not at all/At	least to some extent
Be used for misinformation	6%	94%
Cause critical errors or mishaps (e.g. accidents)	14%	86%
Mean physicians become over reliant on AI to make clinical decisions Only asked to doctors n= 673	18%	82%
Erode human critical thinking skills	19%	81%
Cause disruption to society (e.g. unemployment for large numbers of people)	21%	79%



Clinicians are more likely than researchers to think AI will rapidly increase the volume of scholarly and medical research (at least to some extent)



1/2 - Positive Impacts



Questions: Thinking about the impact AI will have on society and your work, to what extent do you think over the next 2 to 5 years it will...?

Clinicians

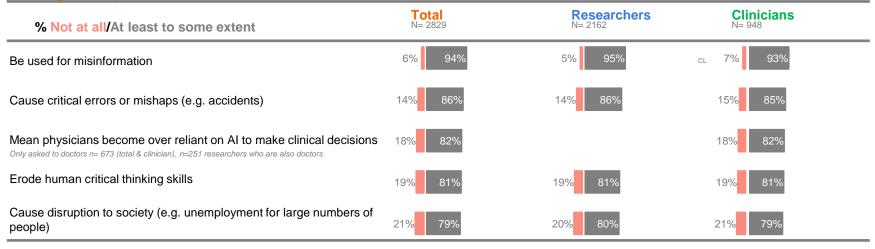
Researchers

Researchers are more likely to think AI will be used for misinformation (at least to some extent) than clinicians



Base: n= 2829

2/2 - Negative Impacts



Questions: Thinking about the impact AI will have on society and your work, to what extent do you think over the next 2 to 5 years it will...? Scale: A great extent, some extent, not at all, don't know/not sure (bottom box and top 2 box excl. don't know) Global

Clinicians

Researchers

Those in APAC see more impact across a range of positive areas than globally and those based in Europe and North America



1/2 - Positive Impacts



Questions: Thinking about the impact AI will have on society and your work, to what extent do you think over the next 2 to 5 years it will...?

Scale: A great extent, some extent, not at all, don't know/not sure (bottom box and top 2 box excl. don't know)



94% think AI will be used for misinformation at least to some extent, less so in South America



2/2 - Negative Impacts



Questions: Thinking about the impact AI will have on society and your work, to what extent do you think over the next 2 to 5 years it will...?

Scale: A great extent, some extent, not at all, don't know/not sure (bottom box and top 2 box excl. don't know)



Significantly higher/lower than...

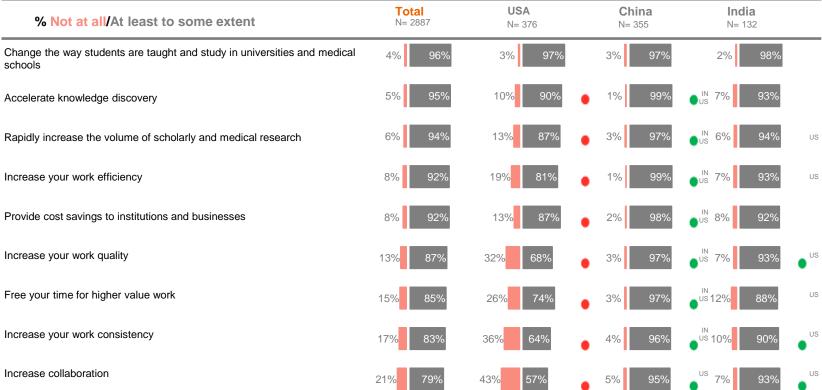
Significantly higher than ...

All is expected to have an impact across many areas, those in the USA are less likely to think AI will impact society and their work than globally. More in China consistently believe AI will have an impact



1/2 - Positive Impacts

Total



Questions: Thinking about the impact AI will have on society and your work, to what extent do you think over the next 2 to 5 years it will...?

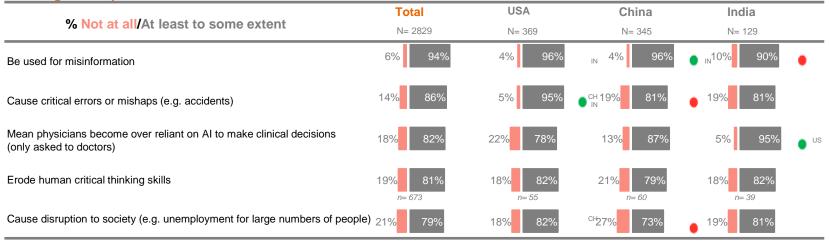
Scale: A great extent, some extent, not at all, don't know/not sure (bottom box and top 2 box excl. don't know)



Those in the USA are more likely to think AI will cause mishaps (at least to some extent) than average. China is less likely to think this



2/2 - Negative Impacts

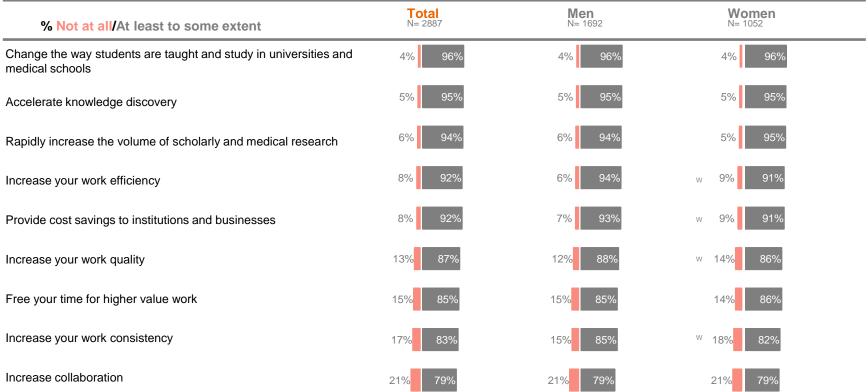


Significantly higher than ...

Men are more likely to think Al will provide cost savings (to at least some extent) than women



1/2 - Positive Impacts

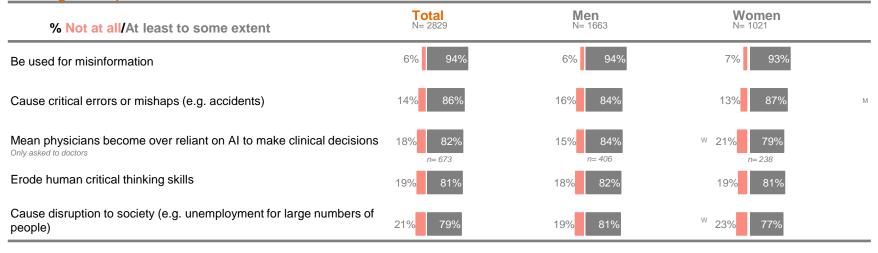


Questions: Thinking about the impact AI will have on society and your work, to what extent do you think over the next 2 to 5 years it will...?

Men are more likely to think AI will cause disruption to society (to at least some extent) than women



2/2 - Negative Impacts



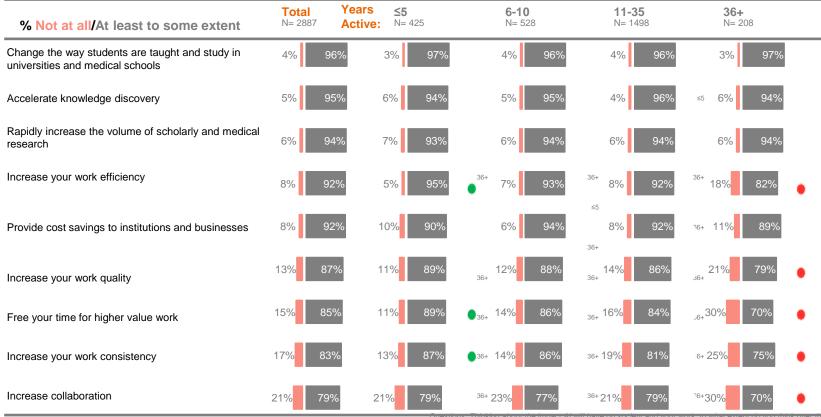
Gender/Generation (indicated by first letter e.g. M= Men)

Those with over 35 years active in their area of work are less likely to think AI will, to any extent, provide many of the following benefits



Base: n= 2887





sidens. Trinking about the impact Ar will have on society and your work, to what extent do you trink over the next 2 to 5 years it will...?

Scale: A great extent, some extent, not at all, don't know/not sure (bottom box and top 2 box excl. don't know)



Yet, they are on par with average in thinking AI will, to at least some extent, have the following negative impacts



Base: n= 2829

2/2 - Negative Impacts



Questions: Thinking about the impact AI will have on society and your work, to what extent do you think over the next 2 to 5 years it will...?

Scale: A great extent, some extent, not at all, don't know/not sure (bottom box and top 2 box excl. don't know)

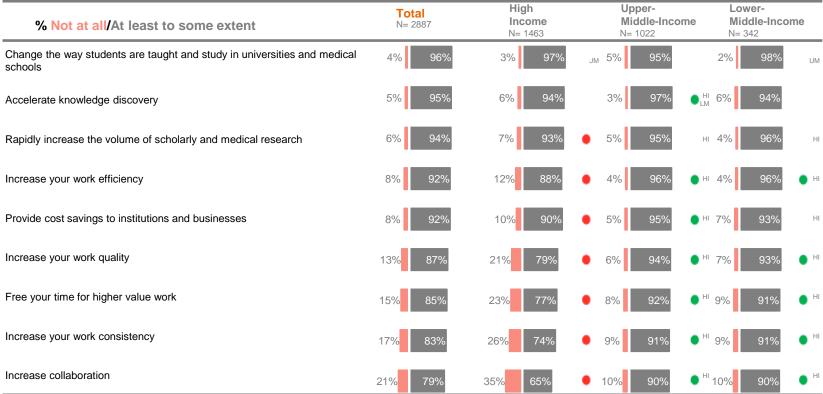


Whilst there is expected to be impact across many benefit areas high income countries are less likely to think there will be an impact



1/2 - Positive Impacts

Total



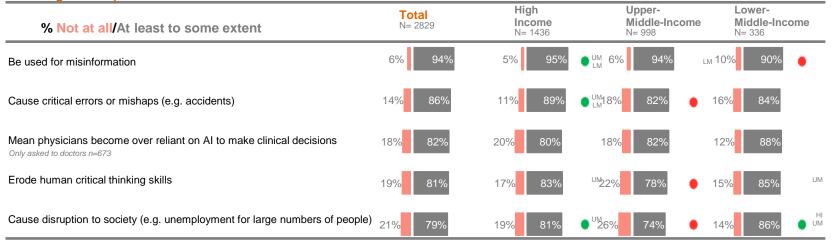
Questions: Thinking about the impact AI will have on society and your work, to what extent do you think over the next 2 to 5 years it will...? Scale: A great extent, some extent, not at all, don't know/not sure (bottom box and top 2 box excl. don't know)



High income markets are more likely to expect negative impacts from Al



2/2 - Negative Impacts



Questions: Thinking about the impact AI will have on society and your work, to what extent do you think over the next 2 to 5 years it will...?

Scale: A great extent, some extent, not at all, don't know/not sure (bottom box and top 2 box excl. don't know)





Most expect generative AI to always be paired with human expertise and to be informed if a tool they used depends on AI



I expect	% Disagree	/Agree
generative AI to always be paired with human expertise (i.e. qualified people validate outputs)	7%	83%
to be informed whether the tools I use depend on generative AI	6%	81%
to be informed if the peer-review recommendations I receive about my manuscript utilized generative AI, even if alongside human oversight	8%	79%
to be given a choice to turn off generative AI in the tools that I use	9%	75%
generative AI will work well with non-text modalities (i.e. chemical or biological compounds, chemical reactions, graphs, plans)	8%	74%
generative AI dependent tools' results be based on high quality trusted sources only	6%	71%
most authors who use generative AI to create the content of a manuscript will not declare that they have	14%	70%

Questions: Thinking about the use of generative AI in your area of work, how much do you agree or disagree with the following either presently or in the near future?

Scale: Strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, strongly disagree, don't know/not applicable (bottom 2 box and top 2 box, excl. don't know)



Many expect generative AI to always be paired with human expertise, particularly among clinicians



% Disagree/Agree	Total N= 2886	Researchers N= 2210	Clinicians N= 963	
generative AI to always be paired with human expertise (i.e. qualified people validate outputs)	7% 83%	9% 81%	6% 86%	RE
to be informed whether the tools I use depend on generative AI	6% 81%	6% 81%	6% 81%	
to be informed if the peer-review recommendations I receive about my manuscript utilized generative AI, even if alongside human oversight	8% 79%	8% 78%	8% 80%	
to be given a choice to turn off generative AI in the tools that I use	9% 75%	9% 76%	8% 74%	
generative AI will work well with non-text modalities (i.e. chemical or biological compounds, chemical reactions, graphs, plans)	8% 74%	10% 72%	7% 77%	RE
generative AI dependent tools' results be based on high quality trusted sources only	6% 71%	6% 68%	• 6% 73%	RE
most authors who use generative AI to create the content of a manuscript will not declare that they have	14% 70%	14% 69%	14% 71%	

Questions: Thinking about the use of generative AI in your area of work, how much do you agree or disagree with the following either presently or in the near future?

Scale: Strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, strongly disagree, don't know/not applicable (bottom 2 box and top 2 box, excl. don't know)

Base: n= 2886



Most regions agree that Generative AI should always be paired with human expertise, those in South America place more emphasis on being informed when a tool depends on Generative Al



Base: n= 2886

% Disagree/Agree	Total N= 2886	Asia Pacific N= 864	Europe N= 933	North America N= 431	South America N= 431	Middle East & Africa N= 186
generative AI to always be paired with human expertise (i.e. qualified people validate outputs)	7% 83%	5% 84%	9% 82%	12% 81%	7% 83%	5% 83%
to be informed whether the tools I use depend on generative AI	6% 81%	4% 80%	9% 79%	7% 82%	3% 89% AF	A 3% 84%
to be informed if the peer-review recommendations I receive about my manuscript utilized generative AI, even if alongside human oversight	8% 79%	8% 75%	10% 79%	8% 81% AF	2 5% 88% AF	75%
to be given a choice to turn off generative AI in the tools that I use	9% 75%	8% 72%	10% 75%	6% 82% AF	9% 79% • AF	73%
generative AI will work well with non-text modalities (i.e. chemical or biological compounds, chemical reactions, graphs, plans)	8% 74%	6% 78%	10% 70%	17% 65%	10% 74% NA	A 8% 74% NA
generative AI dependent tools' results be based on high quality trusted sources only	6% 71%	4% 75%	10% 62%	8 % 64%	3% 76% et	73% EU NA
most authors who use generative AI to create the content of a manuscript will not declare that they have	14% 70%	13% 70%	^{IA} 13% 71%	NA 17% 63%	22% 64%	17% 70%

Questions: Thinking about the use of generative AI in your area of work, how much do you agree or disagree with the following either presently or in the near future? Scale: Strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, strongly disagree, don't know/not applicable (bottom 2 box, and top 2 box, excl. don't know)



Most expect generative AI to always be paired with human expertise, particularly in India



Base: n= 2886

% Disagree/Agree	Total N= 2886	USA N= 375	China N= 348	India N= 128
generative AI to always be paired with human expertise (i.e. qualified people validate outputs)	7% 83%	14% 79%	93% 81%	2% 96% • CH
to be informed whether the tools I use depend on generative AI	6% 81%	8% 80%	сн 2% 75%	● 1% 92% ● CH US
to be informed if the peer-review recommendations I receive about my manuscript utilized generative AI, even if alongside human oversight	8% 79%	8% 81%	сн 6% 73%	4% 82%
to be given a choice to turn off generative AI in the tools that I use	9% 75%	7% 81%	● CH 5% 72%	6% 83% • CH
generative AI will work well with non-text modalities (i.e. chemical or biological compounds, chemical reactions, graphs, plans)	8% 74%	18% 64%	80%	● ^{US} 5% 79% US
generative AI dependent tools' results be based on high quality trusted sources only	6% 71%	9% 61%	0 2% 84%	● US 1% 91% ● US
most authors who use generative AI to create the content of a manuscript will not declare that they have	14% 70%	18% 62%	13%67%	10% 74% US

Questions: Thinking about the use of generative AI in your area of work, how much do you agree or disagree with the following either presently or in the near future? Scale: Strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, strongly disagree, don't know/not applicable (bottom 2 box, and top 2 box, excl. don't know)



Significantly higher/lower than...

Significantly higher than..

Most expect to be informed if peer-review utilized generative AI, this expectation is higher amongst women



% Disagree/Agree	Total N= 2886	Men N= 1701	Women N= 1040	
generative AI to always be paired with human expertise (i.e. qualified people validate outputs)	7% 83%	7% 82%	7% 84%	
to be informed whether the tools I use depend on generative AI	6% 81%	6% 80%	5% 83%	М
to be informed if the peer-review recommendations I receive about my manuscript utilized generative AI, even if alongside human oversight	8% 79%	9% 76%	7% 82%	• M
to be given a choice to turn off generative AI in the tools that I use	9% 75%	10% 74%	8% 76%	
generative AI will work well with non-text modalities (i.e. chemical or biological compounds, chemical reactions, graphs, plans)	8% 74%	8% 74%	9% 75%	
generative AI dependent tools' results be based on high quality trusted sources only	6% 71%	6% 70%	5% 73%	М
most authors who use generative AI to create the content of a manuscript will not declare that they have	14% 70%	14% 69%	15% 70%	

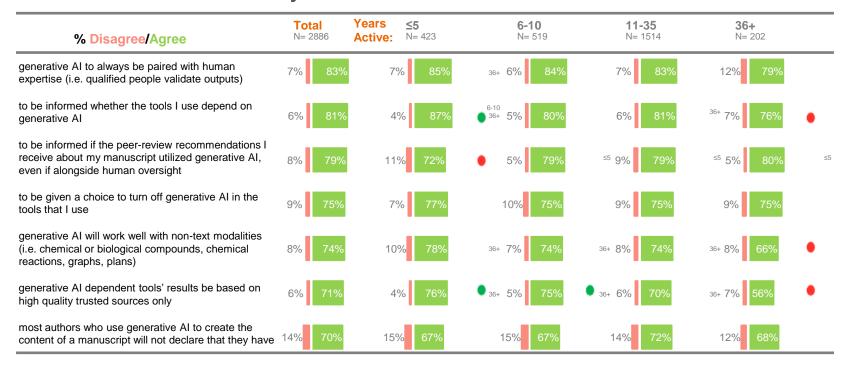
Questions: Thinking about the use of generative AI in your area of work, how much do you agree or disagree with the following either presently or in the near future?



Most expect to be informed if peer-review utilized generative AI, less so for those with 5 or less years' active in their area of work



Base: n= 2886



Questions: Thinking about the use of generative AI in your area of work, how much do you agree or disagree with the following either presently or in the near future?

High income countries are least likely to agree that AI results should be based on high quality sources



% Disagree/Agree	Total N= 288		High Incom N= 147	-	Uppe Midd N= 10	lle-Income	Lowe Midd N= 34	le-Income
generative AI to always be paired with human expertise (i.e. qualified people validate outputs)	7%	83%	11%	81%	4%	83%	4%	88% ● HI
to be informed whether the tools I use depend on generative AI	6%	81%	9%	80%	3%	80%	3%	85% ● HI
to be informed if the peer-review recommendations I receive about my manuscript utilized generative AI, even if alongside human oversight	8%	79%	10%	77%	6%	77%	5%	81%
to be given a choice to turn off generative AI in the tools that I use	9%	75%	10%	75%	6%	74%	8%	75%
generative AI will work well with non-text modalities (i.e. chemical or biological compounds, chemical reactions, graphs, plans)	8%	74%	11%	70% •	6%	78%	∃ 7%	74%
generative AI dependent tools' results be based on high quality trusted sources only	6%	71%	9%	59%	3%	81%	∃ 3%	81% • ^{HI}
most authors who use generative AI to create the content of a manuscript will not declare that they have	14%	70%	15%	69%	15%	68%	10%	74%

Questions: Thinking about the use of generative AI in your area of work, how much do you agree or disagree with the following either presently or in the near future? Scale: Strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, strongly disagree, don't know/not applicable (bottom 2 box, and top 2 box, excl. don't know)





Factors impacting **trust** in generative AI tools. Training an AI tool to not to be harmful, to only use peer-reviewed content and including references would strongly increase trust in generative AI tools



	% No impact/Strop	ngly increase my trust
Training the model to be factually accurate, moral, and not harmful (safety)	6%	58%
Only using high-quality peer-reviewed content to train the model (quality model input)	6%	57%
Citing references by default (transparency)	7%	56%
Keeping the information input confidential (security)	10%	55%
Abidance by any laws governing development and implementation (legality)	8%	53%
Training the model for high coherency outputs (quality model output)	7%	52%

Factors impacting **trust** in generative AI tools. Training an AI tool to not to be harmful, to only use peer-reviewed content and including references would strongly increase trust in generative AI tools. Ways of increasing trust viewed similarly by researchers and clinicians



% No impact/Strongly increase my trust	Total N= 2847	Researchers N= 2164	Clinicians N= 960
Training the model to be factually accurate, moral, and not harmful (safety)	6% 58%	57%	5% 59%
Only using high-quality peer-reviewed content to train the model (quality model input)	6% 57%	7% 56%	4% 58%
Citing references by default (transparency)	7% 56%	56%	6% 57%
Keeping the information input confidential (security)	10% 55%	13% 55%	7% 55%
Abidance by any laws governing development and implementation (legality)	53%	10% 52%	5% 54%
Training the model for high coherency outputs (quality model output)	7% 52%	8% 52%	5% 53%

Total

Factors impacting **trust** in generative AI tools. Training an AI tool to not to be harmful, to only use peerreviewed content and including references would strongly increase trust in generative AI tools. More in Europe and South America think the factors listed would strongly increase their trust, less so in APAC



% No impact/Strongly increase my	Total N= 2847	Asia Pacific N= 851	Europe N= 914	North America N= 422	South America N= 440	Middle East & Africa N= 182
Training the model to be factually accurate, moral, and not harmful (safety)	6% 57%	5% 53% •	8% 60% a _f	9% 60% AP	63% ● AP	8% 60% AP
Only using high-quality peer-reviewed content to train the model (quality model input)	6% 57%	6% 51% •	6% 62% AF		61% • AP	4% 60% AP
Citing references by default (transparency)	7% 56%	7% 50% •	8% 60% • AF	9 8% 59% AF	64% • AP	8% 65% • AP
Keeping the information input confidential (security)	10% 55%	8% 51%	13% 58% NA	49%	8% 63% ● ^{AP} _{NA}	9% 58% AP NA
Abidance by any laws governing development and implementation (legality)	8% 53%	6% 4 9% •	12% 55% ^{AF}	10% 52%	AP 64% ■ NA MEA	10% 50%
Training the model for high coherency outputs (quality model output)	7% 52%	5% 46% •	9% 58% AF	51% AP	5% 62% • AP	6% 60% AP

Questions: To what extent, if at all, would the following factors increase your trust in tools that utilize generative Al? Scale: Strongly increase my trust, slightly increase my trust, no impact on my level of trust, don't know / not applicable (bottom box and top box, excl. don't know)



Factors impacting **trust** in generative AI tools. Training an AI tool to not to be harmful, to only use peer-reviewed content & cite references would strongly increase trust in generative AI tools – keeping the inputs confidential and abided by any laws has greater impact on trust in India



% No impact/Strongly increase my trust	Total N= 2847	USA N= 370	China N= 346	India N= 130
Training the model to be factually accurate, moral, and not harmful (safety)	6% 58%	9% 61%	5% 56%	5% 69% 🔵 сн
Only using high-quality peer-reviewed content to train the model (quality model input)	6% 57%	8% 58%	сн 6%	3% 64% ● сн
Citing references by default (transparency)	7% 56%	8% 62%	CH 6% 51% •	5%
Keeping the information input confidential (security)	10% 55%	15% 50%	7% 51%	71% • CH US
Abidance by any laws governing development and implementation (legality)	8% 53%	10% 52%	5% 51%	8% 61% • CH
Training the model for high coherency outputs (quality model output)	7% 52%	12% 53%	^{CH} 6% 44%	2% 59% ^{CH}

Questions: To what extent, if at all, would the following factors increase your trust in tools that utilize generative AI?

Scale: Strongly increase my trust, slightly increase my trust, no impact on my level of trust, don't know / not applicable (bottom box and top box, excl. don't know)



Factors impacting **trust** in generative AI tools. Training an AI tool to not to be harmful, to only use peer-reviewed content and including references would strongly increase trust in generative AI tools – no differences by gender



% No impact/Strongly increase my trust	Total N= 2847	Men N= 1674	Women N= 1038	
Training the model to be factually accurate, moral, and not harmful (safety)	6% 58%	7% 57%	6% 59%	
Only using high-quality peer-reviewed content to train the model (quality model input)	6% 57%	6% 56%	58%	
Citing references by default (transparency)	7% 56%	7% 56%	7% 56%	
Keeping the information input confidential (security)	10% 55%	11% 54%	8% 55%	
Abidance by any laws governing development and implementation (legality)	8% 53%	9% 52%	6% 5 5%	
Training the model for high coherency outputs (quality model output)	7% 52%	7% 53%	51%	

Questions: To what extent, if at all, would the following factors increase your trust in tools that utilize generative AI?

Scale: Strongly increase my trust, slightly increase my trust, no impact on my level of trust, don't know / not applicable (bottom box and top box, excl. don't know)

Factors impacting **trust** in generative AI tools. Training an AI tool to not to be harmful, to only use peerreviewed content and including references would strongly increase trust in generative AI tools – little meaningful difference by years active



% No impact/Strongly increase	Total N= 2847	Years Active:	≤5 N= 422		6-10 N= 515		11-35 N= 1501	36+ N= 202
Training the model to be factually accurate, moral, and not harmful (safety)	6%	58%	7%	56%	6%	56%	6%	7% 60%
Only using high-quality peer-reviewed content to train the model (quality model input)	6%	57%	7%	57%	6%	55%	5% 59%	3% 59%
Citing references by default (transparency)	7%	56%	6%	60% ⁶⁻¹⁰	7%	54%	7% 58%	₃₆₊ 12% 50% •
Keeping the information input confidential (security)	10%	55%	8%	60% • 36-	+ 10%	55%	₃₆₊ 10% 55%	₃₆₊ 13% 46% •
Abidance by any laws governing development and implementation (legality)	8%	53%	7%	52%	9%	53%	7% 55%	9% 53%
Training the model for high coherency outputs (quality model output)	7%	52%	6%	50%	6%	49%	7% 55% (≤5 6% 55%

Questions: To what extent, if at all, would the following factors increase your trust in tools that utilize generative AI?

Across each of the country income ranges approximately half say the below safeguards would strongly increase trust in AI tools. High income countries levels of trust in AI tools higher if high quality content has been used to train the model and outputs include references



Base: n= 2847

% No impact/Strongly increase	Total N= 2847	High Income N= 1451	Upper- Middle-Income N= 1004	Lower- Middle-Income N= 333
Training the model to be factually accurate, moral, and not harmful (safety)	6% 58%	7% 59%	_{UM} 6% 55%	6% 57%
Only using high-quality peer-reviewed content to train the model (quality model input)	6% 57%	6%	∪м 6% 53% ●	6% 55%
Citing references by default (transparency)	7% 56%	8% 59% •	^{UM} 6% 53% ●	53%
Keeping the information input confidential (security)	10% 55%	12% 56%	^{UM} 9% 51%	8% 61% ● ^{HI} um
Abidance by any laws governing development and implementation (legality)	8% 53%	9% 54%	6% 51%	8% 53%
Training the model for high coherency outputs (quality model output)	7% 52%	8% 56% •	^{UM} 7% 47% ●	3% 53% ^{UM}

Questions: To what extent, if at all, would the following factors increase your trust in tools that utilize generative Al? Scale: Strongly increase my trust, slightly increase my trust, no impact on my level of trust, don't know / not applicable (bottom box and top box, excl. don't know)





Significantly higher/lower than...

Significantly higher than..

What increases **comfort** of using a tool dependent on generative AI? Knowing the information the model uses is up-to-date, privacy is respected, robust governance are the most selected top-three items



	% Selected
That the information the model uses is up-to-date	37%
That privacy is respected on user inputs	36%
Robust governance on data and information used to train the model	36%
That there is accountability through human oversight	36%
That the real-world impact on people has been considered	30%
That actions have been taken to prevent unfair bias	28%
That privacy is respected on outputs generated by the model	27%
That the way the solution works can be, and is, explained	26%
Don't know / not sure	6%
None of the above	2%

Clinicians are more likely to cite that real-world impacts have been considered



1/2	Total N= 2999	Researchers N= 2284	Clinicians N= 1007
That the information the model uses is up-to-date	37%	37%	37%
That privacy is respected on user inputs	36%	35%	37%
Robust governance on data and information used to train the model	36%	37%	35%
That there is accountability through human oversight	36%	36%	37%
That the real-world impact on people has been considered	30%	27%	34% • RE

More researchers than clinicians say that knowing that the way the solution works can be (is) explained would increase their **comfort** in using that tool



2/2	Total N= 2999	Researchers N= 2284	Clinicians N= 1007
That actions have been taken to prevent unfair bias	28%	29%	27%
That privacy is respected on outputs generated by the model	27%	25%	29% RE
That the way the solution works can be, and is, explained	26%	29% • ^{CL}	24%
Don't know / not sure	6%	6%	5%
None of the above	2%	2%	2%

Those in North and South America and more likely to think accountability through human oversight would increase comfort, those in Europe are more likely to say that having robust governance would increase their comfort in that tool (1/2)



1,	Total /2 N= 2999	Asia Pacific N= 894	Europe N= 968	North America N= 450	South America N= 451	Middle East & Africa N= 193
That the information the model uses is up-to-date	37%	36%	37%	sa 40% s.	32%	39% SA
That privacy is respected on user inputs	36%	38% NA	35%	NA 27%	38% NA	39% NA
Robust governance on data and information used to train the model	36%	35% MEA	39%	AP NA MEA 33% MEA	39% NA	21%
That there is accountability through human oversight	36%	30%	38%	AP MEA 48% EI S. ME.	43% EU	26%
That the real-world impact on people has been considered	30%	29%	30%	33%	35% • AF	

Questions: Which information areas about a tool's dependency on generative AI would most increase your comfort in using that tool? Select: up to three



Those in North and South America and more likely to think accountability through human oversight would increase comfort, those in Europe are more likely to say that having robust governance would increase their comfort in that tool (2/2)



2/	Total 2 N= 2999	Asia Pacific N= 894	Europe N= 968	North America N= 450	South America N= 451	Middle East & Africa N= 193
That actions have been taken to prevent unfair bias	28%	28%	30%	26%	29%	27%
That privacy is respected on outputs generated by the model	27%	30% • EU	23%	20%	27% NA	28% NA
That the way the solution works can be, and is, explained	26%	28% SA	26%	24%	23%	31% NA SA
Don't know / not sure	6%	5% SA	6%	SA 8% AP	3%	8% AP SA
None of the above	2%	1%	2%	AP 3%	2%	2%

Questions: Which information areas about a tool's dependency on generative AI would most increase your comfort in using that tool? Select: up to three



Total

Those in the USA are more likely to say that having accountability through human oversight would increase their **comfort** in that tool (1/2)



1/2	Total N= 2999	USA N= 393	China N= 358	India N= 134
That the information the model uses is up-to-date	37%	41%	• сн 29%	• 38% сн
That privacy is respected on user inputs	36%	27%	43%	• us 39% us
Robust governance on data and information used to train the model	36%	33%	38%	№ 28%
That there is accountability through human oversight	36%	49%	CH 29%	26%
That the real-world impact on people has been considered	30%	32%	27%	27%

Questions: Which information areas about a tool's dependency on generative AI would most increase your comfort in using that tool?

Select: up to three

Those in the USA are more likely to say that having accountability through human oversight would increase their **comfort** in that tool (2/2)



2/2	Total N= 2999	USA N= 393	China N= 358	India N= 134	
That actions have been taken to prevent unfair bias	28%	27%	26%	28%	
That privacy is respected on outputs generated by the model	27%	19%	• 32%	• us 31%	US
That the way the solution works can be, and is, explained	26%	25%	29%	23%	
Don't know / not sure	6%	8%	• CH 4%	7%	СН
None of the above	2%	3%	2%	1%	

Questions: Which information areas about a tool's dependency on generative AI would most increase your comfort in using that tool? Select: up to three

Role/Region/ Country (indicated by first two letters e.g. AP = APAC)

More women say than men that the real-world impact on people being considered would increase their **comfort** (1/2)



1/2	Total N= 2999	Men N= 1755	Women N= 1085
That the information the model uses is up-to-date	37%	37%	36%
That privacy is respected on user inputs	36%	34%	38% м
Robust governance on data and information used to train the model	36%	38%	w 34%
That there is accountability through human oversight	36%	35%	37%
That the real-world impact on people has been considered	30%	26%	● 35% • ^M

Questions: Which information areas about a tool's dependency on generative AI would most increase your comfort in using that tool?





More women say than men that the real-world impact on people being considered would increase their **comfort** (2/2)



2/2	Total N= 2999	Men N= 1755	Women N= 1085
That actions have been taken to prevent unfair bias	28%	30%	w 26%
That privacy is respected on outputs generated by the model	27%	26%	29%
That the way the solution works can be, and is, explained	26%	28%	w 25%
Don't know / not sure	6%	6%	w 4%
None of the above	2%	2%	1%

Questions: Which information areas about a tool's dependency on generative AI would most increase your comfort in using that tool?





Those active in their area of work less than 11 years say that the information the model uses being up-to-date would increase their **comfort** in that tool, more so than average. Governance is more important for those active in role 11+ years (1/2)



1/2	IOtal	Years Active:	≤5 N= 431		6-10 N= 541		11-35 N= 1565		36+ N= 215	
That the information the model uses is up-to-date	37%		42%	1 1-35	41%	11-35	34%	•	37%	
That privacy is respected on user inputs	36%		40%	6-10 36+	34%	36+	37%	36+	27%	•
Robust governance on data and information used to train the model	36%		30%	•	32%		39%	≤5 6-10	38%	≤5
That there is accountability through human oversight	36%		34%		39%		37%		38%	
That the real-world impact on people has been considered	30%		35%	6-10 11-35	28%		29%		32%	

Questions: Which information areas about a tool's dependency on generative AI would most increase your comfort in using that tool?



Total

Global

Those active in their area of work less than 11 years say that the information the model uses being up-to-date would increase their **comfort** in that tool, more so than average. Governance is more important for those active in role 11+ years (2/2)



2/2	Total N= 2999	Years Active:	≤5 N= 431		6-10 N= 541		11-35 N= 1565		36+ N= 215	
That actions have been taken to prevent unfair bias	28%		21%	•	30%	≤5	30%	● ≤5	36%	≤5 11-35
That privacy is respected on outputs generated by the model	27%		31%	6-10 36+	23%		28%	6-10	23%	
That the way the solution works can be, and is, explained	26%		26%		24%		28%	6-10	29%	
Don't know / not sure	6%		4%		6%		5%		5%	
None of the above	2%		1%		2%		1%		3%	≤5 11-35

Questions: Which information areas about a tool's dependency on generative AI would most increase your comfort in using that tool?



Those in lower-middle-income countries would feel more **comfortable** using an Al tool if privacy of user inputs is respected, while accountability and governance most increase **comfort** for high income markets (1/2)



1/2	Total N= 2999	High Income N= 1533	Upper- Middle-Income N= 1050	Lower- Middle-Income N= 353
That the information the model uses is up-to-date	37%	39%	им 33%	38%
That privacy is respected on user inputs	36%	32%	40% • н	41% • н
Robust governance on data and information used to train the model	36%	39%	LM 36% LM	26%
That there is accountability through human oversight	36%	40%	UM 32% ●	28%
That the real-world impact on people has been considered	30%	30%	29%	36% • HI

Questions: Which information areas about a tool's dependency on generative AI would most increase your comfort in using that tool? Select: up to three

Those in lower-middle-income countries would feel more comfortable using an AI tool if privacy of user inputs is respected, while accountability and governance most increase **comfort** for high income markets (2/2)



2	Total N= 2999	High Income N= 1533	Upper- Middle-Income N= 1050	Lower- Middle-Income N= 353
That actions have been taken to prevent unfair bias	28%	29%	28%	25%
That privacy is respected on outputs generated by the model	27%	23%	29% • ні	31% • н
That the way the solution works can be, and is, explained	26%	27% LM	27% LM	22%
Don't know / not sure	6%	6% UM	4%	7% UM
None of the above	2%	2%	2%	1%

Questions: Which information areas about a tool's dependency on generative AI would most increase your comfort in using that tool? Select: up to three

Total

Opinion divided as to whether generative AI should be integrated or kept separate in solutions already used, slightly more would prefer that it is provided as a separate module



	% Selected
provided as a separate module	42%
integrated into the product	37%
Don't know / not sure	21%

The picture is similar for both researchers and clinicians

Total

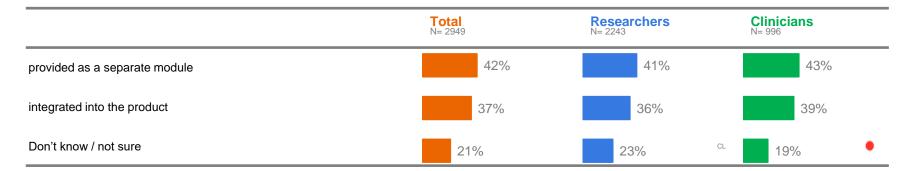
Researchers

Clinicians

Back to home



Select: only one Base: n= 2949



Questions: Would you prefer any generative AI functionality included in a product you use already to be...?

Although those in APAC prefer to have a separate generative AI module, more in APAC prefer to have AI integrated into an existing product than globally. South America prefers to have AI integrated



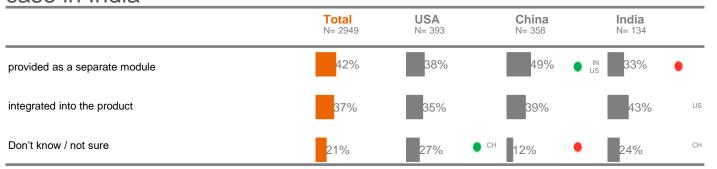
	Total N= 2949	Asia Pacific N= 894	Europe N= 964	North America N= 450	South America N= 405	Middle East & Africa N= 193
provided as a separate module	42%	42% MEA	44% N	38%	41% меа	34%
integrated into the product	37%	40% • EU	31%	33%	42% • EU	36%
Don't know / not sure	21%	17%	26% • ⁶	29% • AP	17%	30% • AP SA

Questions: Would you prefer any generative AI functionality included in a product you use already to be...?



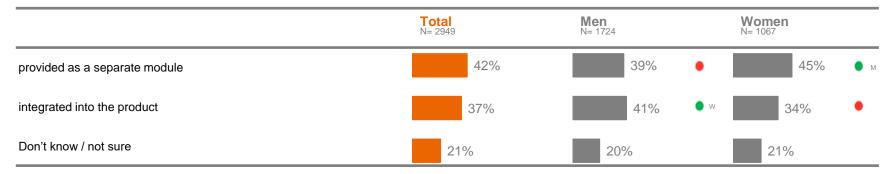
Those in the USA are least sure if generative AI should be separate or integrated. In China there is a preference for separate, this is not the case in India





Women would prefer generative AI functionality to be provided as a separate module





Opinion is divided as to whether generative AI should be integrated or kept separate in solutions already used, more would prefer that it is provided as a separate module. Those with more than 35 active years in their area of work are least sure if AI should be separate or integrated



	Total Years N= 2949 Active:	≤5 N= 426	6-10 N= 530	11-35 N= 1535	36+ N= 212
provided as a separate module	42%	42%	38%	43% 6-10	39%
integrated into the product	37%	42% 11-35 36+	43% • 11-35 36+	37% 36+	26%
Don't know / not sure	21%	16%	19%	20% ≤5	35% • 6-10 11-35

Questions: Would you prefer any generative AI functionality included in a product you use already to be...?



Total



Global

Mixed views about generative AI functionalities being integrated by country income groups



	Total N= 2949	High Income N= 1529	Upper- Middle-Income N= 1004	Lower- Middle-Income N= 353
provided as a separate module	42%	40%	45% • HI	37%
integrated into the product	37%	35%	40% HI	38%
Don't know / not sure	21%	25%	15%	25% UM

Questions: Would you prefer any generative Al functionality included in a product you use already to be...?

Select: only one

4. Areas That Would Benefit From Al

Theme 4



Areas That Would Benefit From Al

Thinking about the general areas of activity you need to complete, how much benefit, if any, do you believe the assistance of AI would bring? Available overall & by persona only

Slide 158



Al is expected to bring some benefit to many different activity areas. Least benefit is expected in funding related activities



	% No Benefit/At lea	st some benefit
Data Science activities	4%	96%
Using scientific content (e.g. keeping up-to-date)	5%	95%
Teaching/Lecturing activities	4%	96%
Clinical activities (e.g. clinical diagnoses, patient summaries)	5%	95%
Research related activities	5%	95%
Publication and monitoring impact of research (e.g. authoring or reviewing)	8%	92%
Funding related activities	16%	84%



Benefit is expected across many activity areas, more clinicians than researchers see benefit of AI in using scientific content and funding related activities



% No Benefit/At least some benefit	Total N= 2836	Researchers N= 2156	Clinicians N= 964	
Data Science activities	4% 96%	4% 96%		
Using scientific content (e.g. keeping up-to-date)	5% 95%	7% 93%	97%	RE
Teaching/Lecturing activities	4% 96%	5% 95%	3% 97%	RE
Clinical activities (e.g. clinical diagnoses, patient summaries)	5% 95%		5%	
Research related activities	5% 95%	5% 95%		
Publication and monitoring impact of research (e.g. authoring or reviewing)	8% 92%	8% 92%		
Funding related activities	16%	17% 83%	10%	RE

5. Likelihood To Use an Al Assistant

Theme 5



Likelihood To Use an Al Assistant

If you had a reliable and secure Al assistant to help you... [general activity area] asked to those who see Al benefit to these areas

how likely would you be to use it to...

Relevant Persona

All only available by persona, region & key market

complete research related activities	review prior studies	Both	Slide 162
completing clinical activities	assess symptoms	Clinicians	Slide 162
preparing your paper	proof your paper	Researchers	Slide 162
using scientific content	generate a synthesis of research articles	Researchers	Slide 162



Of those who believe AI would help, the majority of researchers and clinicians would likely use a reliable and secure AI assistant to help them generate new research hypotheses for testing, assessing symptoms, proofing papers and summarising research in an area

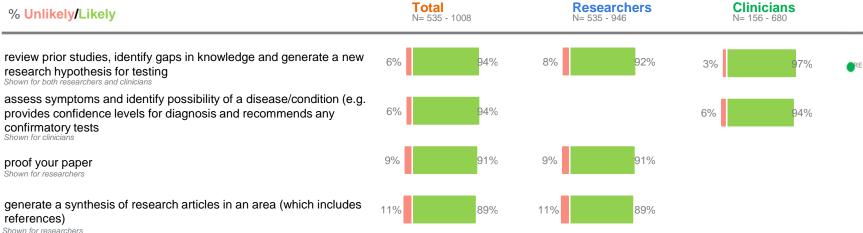


	% Unlikely/Likely			
review prior studies, identify gaps in knowledge and generate a new research hypothesis for testing Shown for both researchers and clinicians	6%	94%		
assess symptoms and identify possibility of a disease/condition (e.g. provides confidence levels for diagnosis and recommends any confirmatory tests Shown for clinicians	6%	94%		
proof your paper Shown for researchers	9%	91%		
generate a synthesis of research articles in an area (which includes references) Shown for researchers	11%	89%		



Likelihood to use a reliable and secure Al assistant to review prior studies and generate hypothesis, for those who believe it would help in their work, is higher for clinicians







Clinicians

Likelihood to use a reliable and secure AI assistant to review prior studies and generate hypothesis, for those who believe it would help in their work, is higher for those in APAC and lower in North America



% Unlikely/Likely	Total N= 535 - 1008	Asia Pacific N= 173 - 349	Europe N= 157 - 307	North America N= 67 - 158	South America N= 68 - 194	Middle East & Africa N= 27 - 72
review prior studies, identify gaps in knowledge and generate a new research hypothesis for testing Shown for both researchers and clinicians	6% 94%	4% 96%	NA 9%	91% •NA16% 84% •	95′ NA	3% 97% EU
assess symptoms and identify possibility of a disease/condition (e.g. provides confidence levels for diagnosis and recommends any confirmatory tests	6% 94%	4% 96%	8%	92% 6% 94%	6% 94%	
proof your paper Shown for researchers	9% 91%	6% 94% _M	EU 14%	86% 12%	4% 96° _N	EU 17% 83%
generate a synthesis of research articles in an area (which includes references) Shown for researchers	11% 89%	11% 89%	13%	87% 8% 92%	7% 93% _E	14% 86%



Questions: If you had a reliable and secure Al assistant to help you complete research related activities, how likely would you be to use it to...

Scale: Very Likely, likely, somewhat likely, unlikely, not at all likely, don't know, not applicable (bottom 2 box and top 3 box, excl. don't know)

Likelihood to use a reliable and secure AI assistant to review prior studies and generate hypothesis, for those who believe it would help in their work, is higher for those in India



% Unlikely/Likely	Total N= 535 - 1008	USA N= 56 - 135		China N= 59 - 153	India N= 28 - 46
review prior studies, identify gaps in knowledge and generate a new research hypothesis for testing Shown for both researchers and clinicians	6% 94	% 16%	85%	4%	96% us 0% 100% us
assess symptoms and identify possibility of a disease/condition (e.g. provides confidence levels for diagnosis and recommends any confirmatory tests Shown for clinicians	6% 94	% 4%	96%	C	1 00% N 11% 89%
proof your paper Shown for researchers	9% 91	% 13%	88%	1%	99% ous
generate a synthesis of research articles in an area (which includes references) Shown for researchers	11% 89	% 10%	90%	8%	92% 3% 97%

Questions: If you had a reliable and secure Al assistant to help you [general activity area], how likely would you be to use it to...

6. Al and Elsevier

Theme 6



Al & Elsevier

Thinking about the use of generative AI in your area of work and the role of Elsevier, how much do you agree or disagree with the following?

Slide 168



Three quarters feel Elsevier is well positioned to develop AI tools



	% Disagree	e/Agree
Elsevier is well positioned to develop generative AI tools	3%	75%
I would trust tools developed by Elsevier that utilize generative Al	3%	74%

Back to home

Three quarters feel Elsevier is well positioned to develop AI tools

Total

Researchers

Clinicians

Back to home



% Disagree/Agree	Total N= 2674		
Elsevier is well positioned to develop generative AI tools	3% 75%	4% 74%	2% 77%
I would trust tools developed by Elsevier that utilize generative Al	3% 74%	4% 74%	2% 74%

Those in South America and the Middle East & Africa are more likely to trust Elsevier tools that utilize generative Al

Back to home



Base: n= 2674

% Disagree/Agree	Total N= 2674	Asia Pacific N= 802	Europe N= 833	North America N= 389	South America N= 427	Middle East & Africa N= 184
Elsevier is well positioned to develop generative Al tools	3% 75%	2% 74% NA	4% 75% NA	7% 67%	3% 83% EU	0 1% 86% ● EU NA
I would trust tools developed by Elsevier that utilize generative AI	3% 74%	1% 72% ^{NA}	6% 74% ^{NA}	9% 65% •	3% 81% NA	AP EU 84% ♠ NA

Men are more likely to trust Elsevier tools that utilise generative AI, though agreement is high for both groups



Base: n= 2674

% Disagree/Agree	Total N= 2674	Men N= 1581	Women N= 971
Elsevier is well positioned to develop generative AI tools	3% 75%	3% 76%	2% 76%
I would trust tools developed by Elsevier that utilize generative AI	3% 74%	3% 77%	● ^w 3% 71%

Questions: Thinking about the use of generative AI in your area of work and the role of Elsevier, how much do you agree or disagree with the following:

Those with least time active in their area are most likely to trust Elsevier tools that utilise generative AI, though agreement is high for all groups



% Disagree/Agree	Total N= 2674	Years Active	≤ 5 N= 392		6-10 N= 484		11-35 N= 1403	3	36+ N= 187	
Elsevier is well positioned to develop generative Al tools	3%	75%	3%	80% 6-10	3%	75%	3%	75%	1%	81%
I would trust tools developed by Elsevier that utilize generative AI	3%	74%	3%	80% • 6-10	4%	75%	4%	72%	1%	75%

Questions: Thinking about the use of generative AI in your area of work and the role of Elsevier, how much do you agree or disagree with the following:

Those in lower-middle-income countries are in highest agreement that Elsevier is well positioned and trusted to develop Al tools



% Disagree/Agree	Total N= 2674	High Income N= 1316	Upper- Middle-Income N= 972	Lower- Middle-Income N= 328
Elsevier is well positioned to develop generative Al tools	3% 75%	5% 73% •	2% 74%	1% 86% ● HI
I would trust tools developed by Elsevier that utilize generative AI	3% 74%	6% 71% •	1% 73%	1% 85% ∪M

Questions: Thinking about the use of generative AI in your area of work and the role of Elsevier, how much do you agree or disagree with the following: Scale: Strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, strongly disagree, don't know/not applicable (bottom 2 box, and top 2 box, excl. don't know)



