



# Insights 2024: Attitudes toward AI Databook

**July 2024**

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# Insights 2024: Attitudes toward AI

## 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 [OECD/Pharma Factbook population figures for researchers and clinicians](#) by region, and to equally represent Research and Health sectors in the totals. Health is weighted 50:50 medicine and nursing.

# Chapters by Theme

<b>1</b>	<b>Awareness of AI</b>	<a href="#"><u>Slide 5</u></a>
<b>2</b>	<b>Usage of AI</b>	<a href="#"><u>Slide 16</u></a>
<b>3</b>	<b>Perceptions of AI</b>	<a href="#"><u>Slide 68</u></a>
<b>4</b>	<b>Areas That Would Benefit From AI</b>	<a href="#"><u>Slide 156</u></a>
<b>5</b>	<b>Likelihood To Use an AI Assistant</b>	<a href="#"><u>Slide 160</u></a>
<b>6</b>	<b>AI &amp; Elsevier</b>	<a href="#"><u>Slide 166</u></a>

# Data Breakdowns Included

## Global 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 AI

# Theme 1

## Awareness of AI

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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](#)

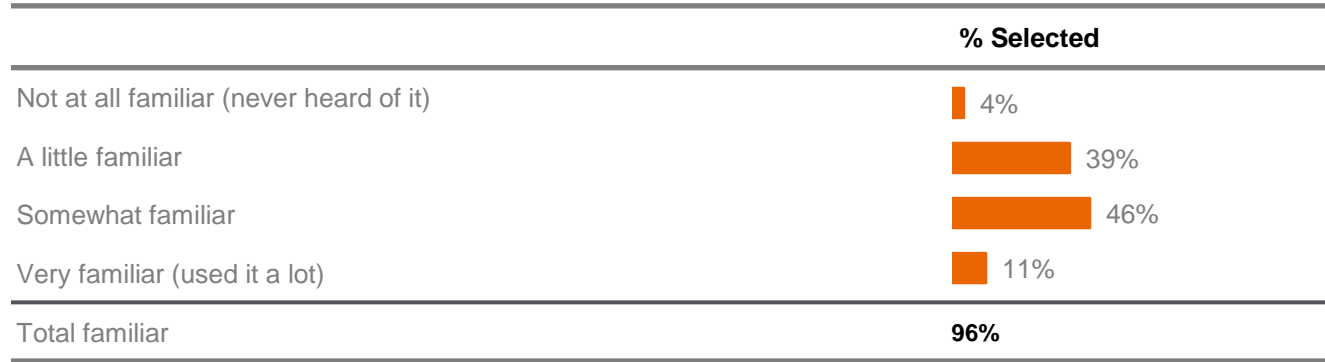
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Which of these AI products, if any, have you heard of before today? (only shown top 8)

[Slide 12](#)

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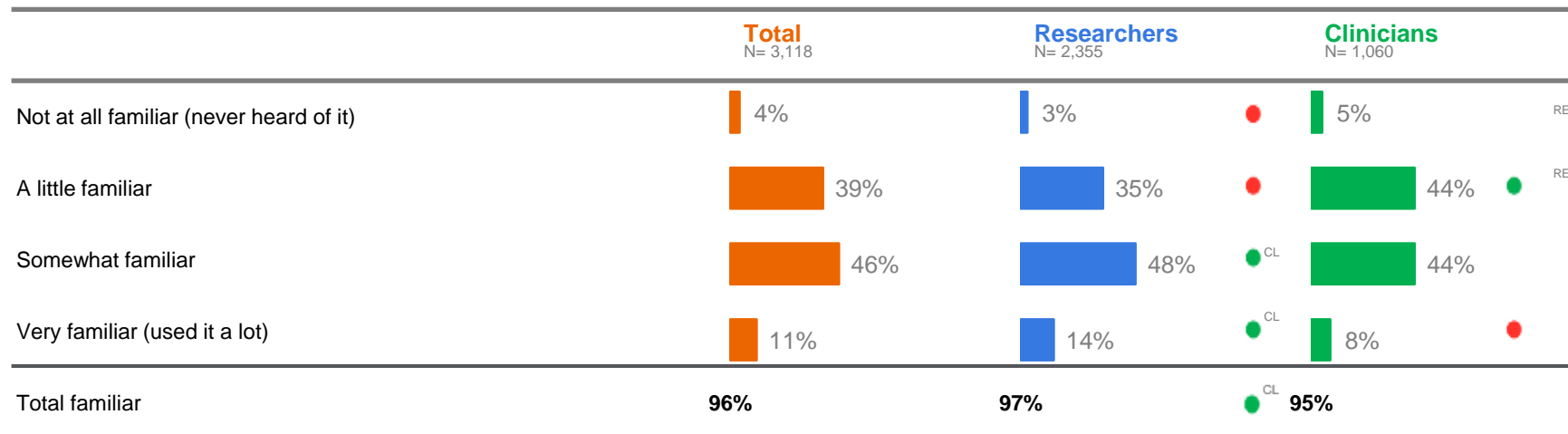
# Most have heard of AI, but only around one in ten are very familiar with it



Questions: To what extent are you familiar with AI?

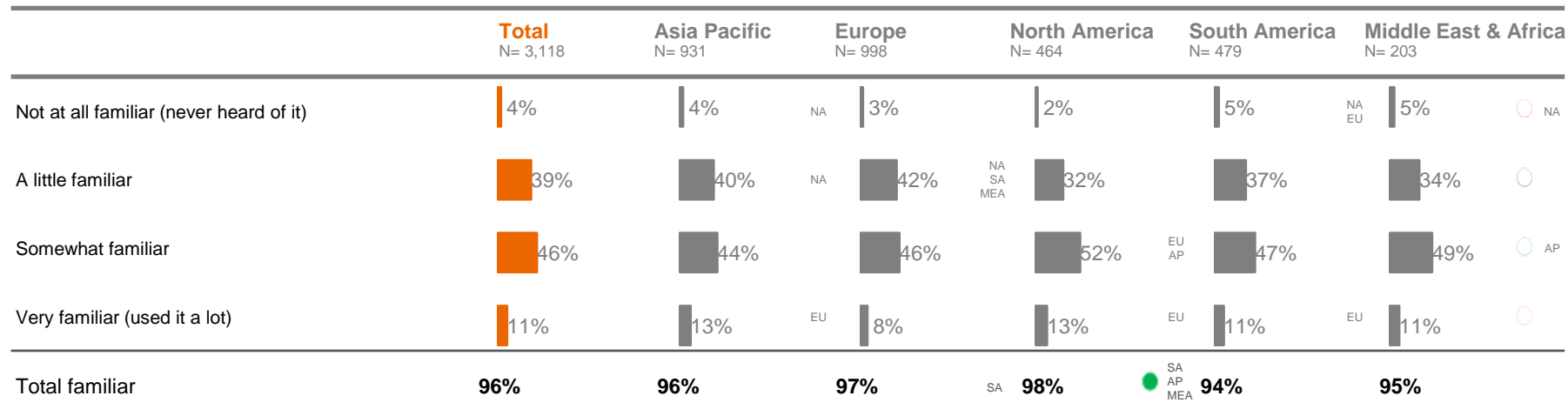
Base: n= 3118

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





# Awareness of AI is high globally across regions



Questions: To what extent are you familiar with AI?

Total

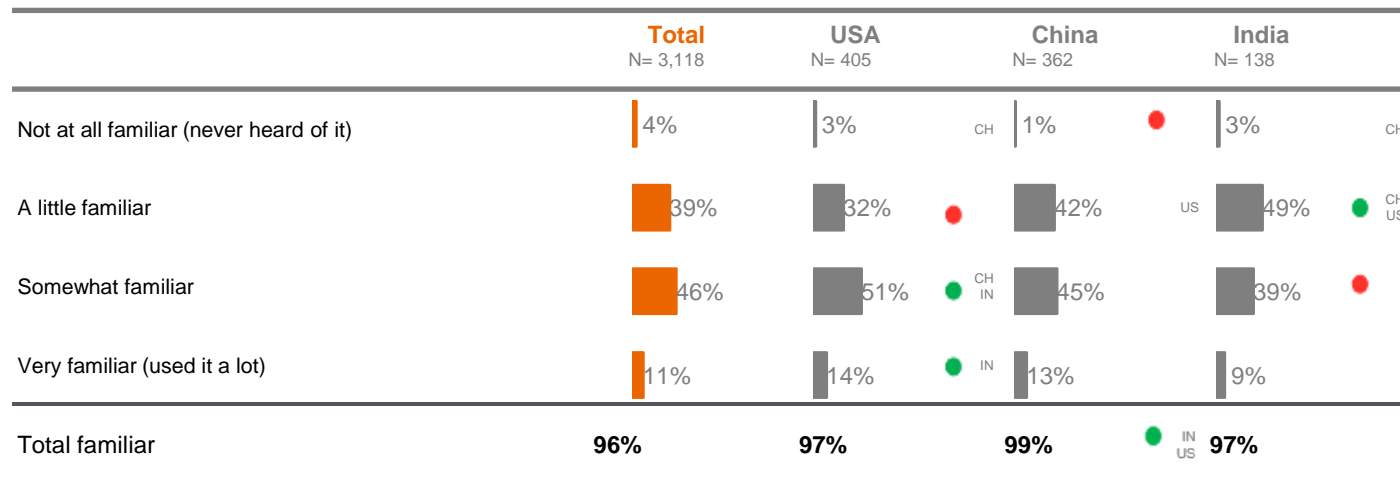


Significantly higher/ lower than...  
Significantly higher than...

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

Base: n= 3118

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



Questions: To what extent are you familiar with AI?

Base: n= 3118

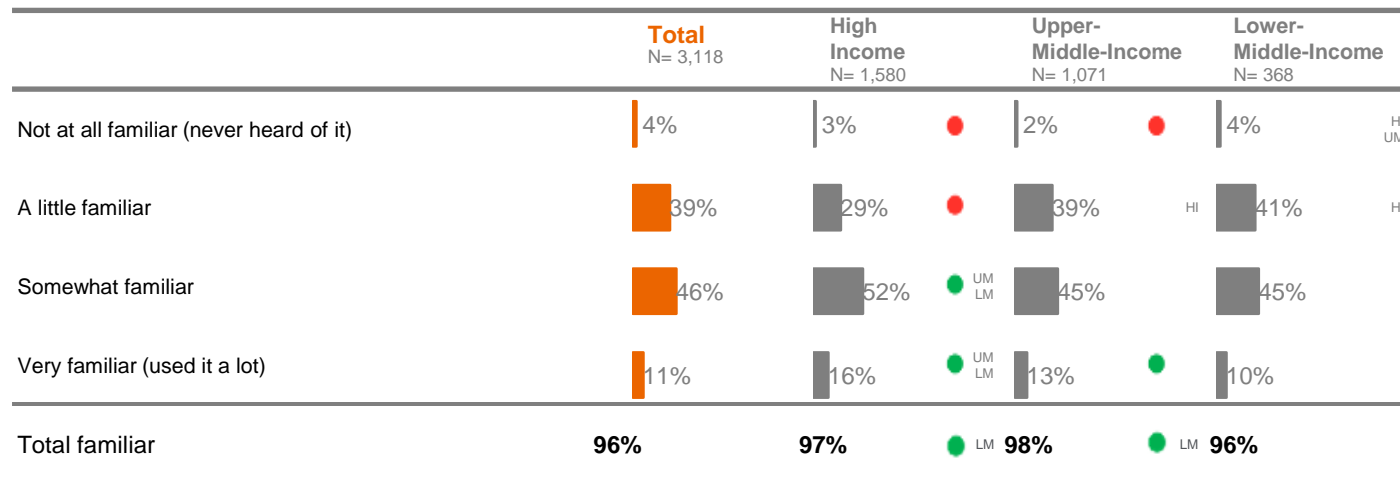
Total



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 Significantly higher than...

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

# Awareness of AI is high globally, those in high income and upper-middle income countries have greater familiarity with AI



Note. Subsequent statistics exclude those not familiar with AI.

Questions: To what extent are you familiar with AI?

Total



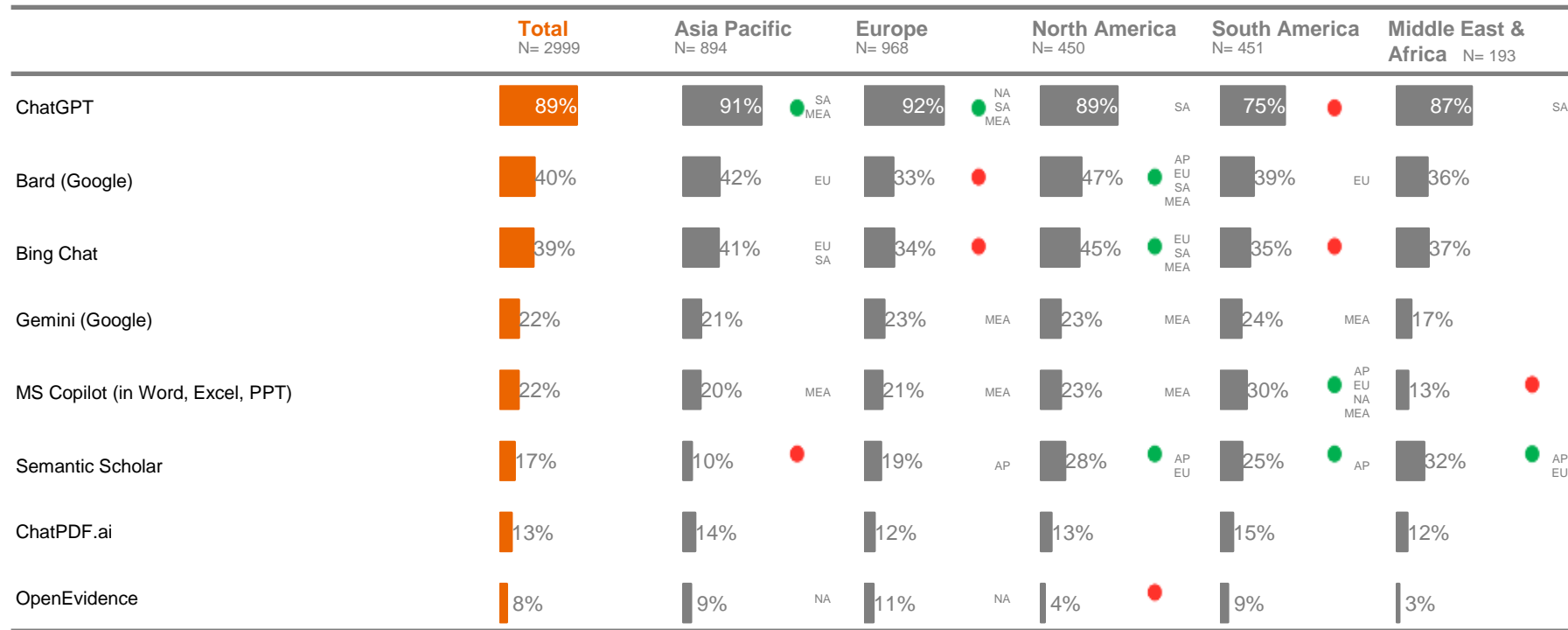
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● Global

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

Base: n= 3118

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



Note: Only top 8 products shown

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

Base: n= 2999

Total

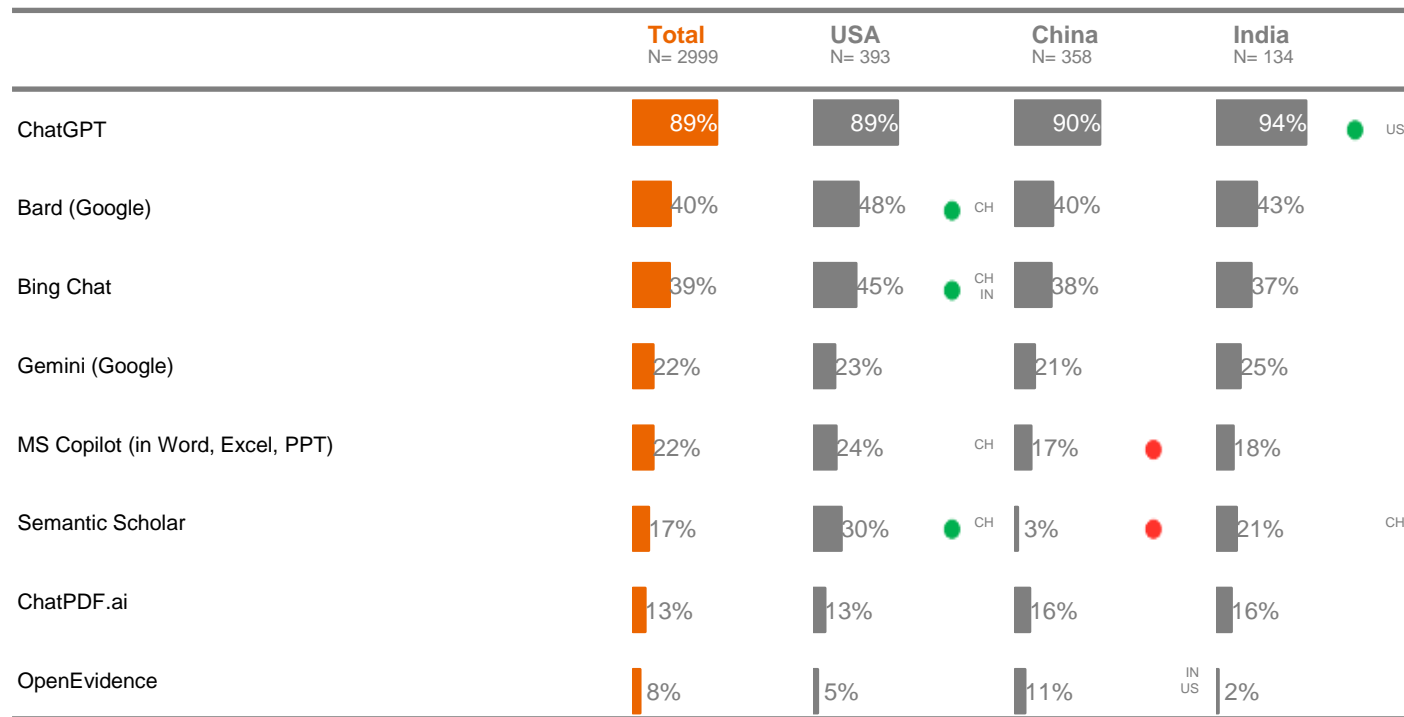


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Significantly higher than...

● ● Global

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

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



Note: Only top 8 products shown

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

Base: n= 2999

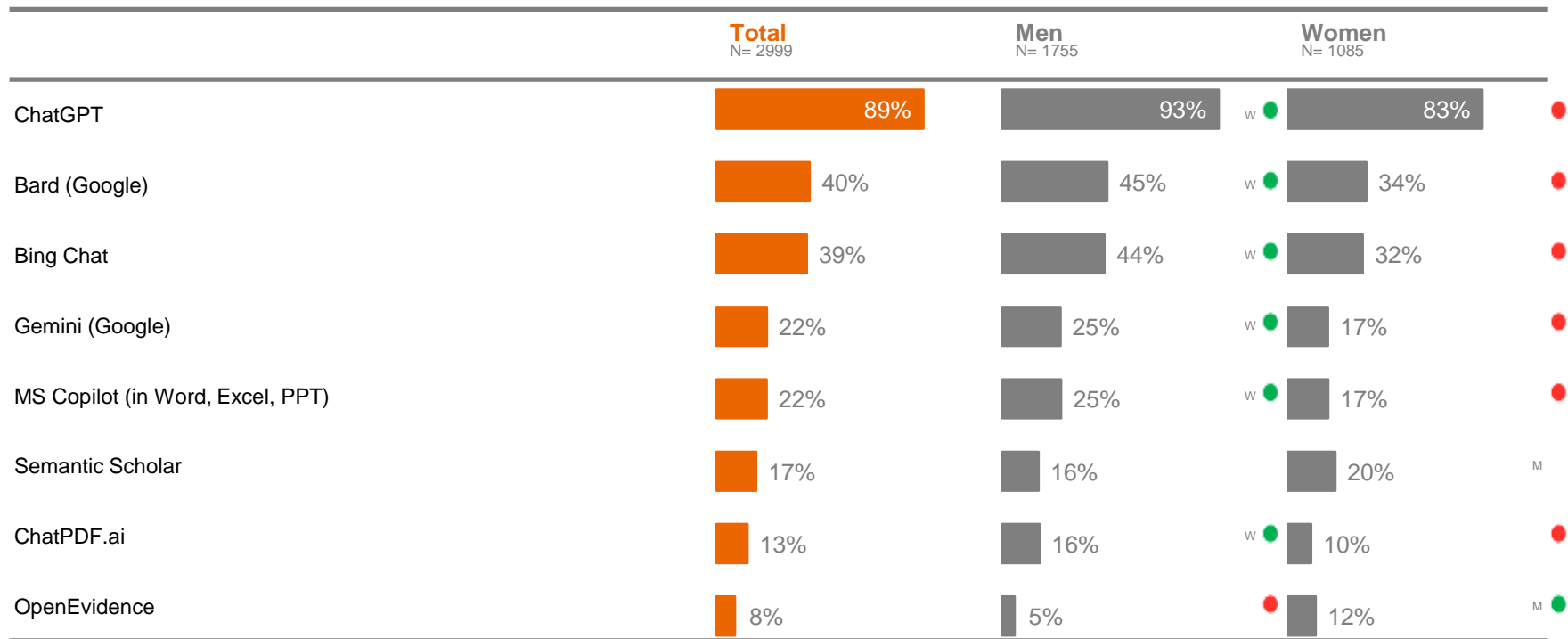
Total



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

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

# 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 AI products, if any, have you heard of before today?

Total



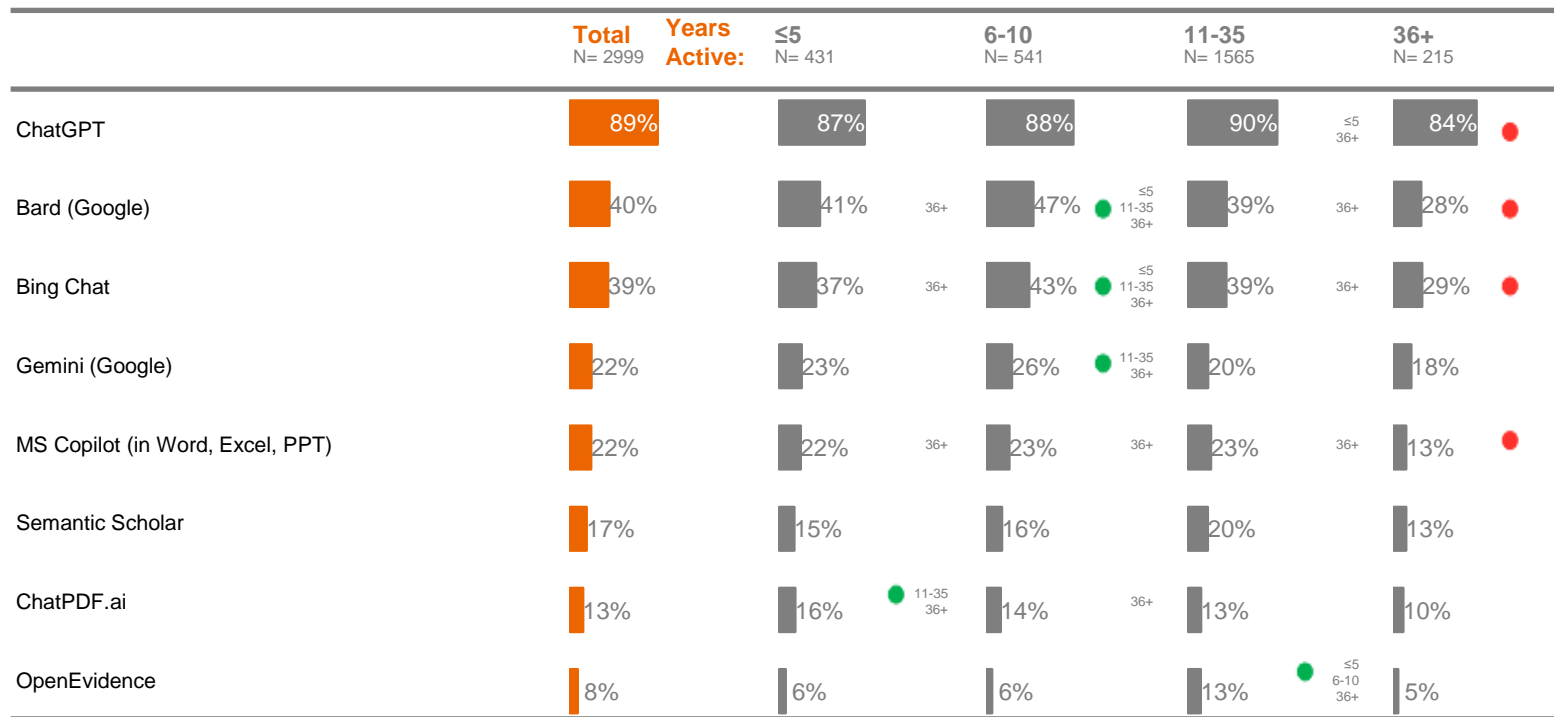
Significantly higher/ lower than ...  
Significantly higher than ...

● ● Global

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

Select: all that apply  
Base: n= 2999

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



Note: Only top 8 products shown

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

Total



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



Global

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

Base: n= 2999

## 2. Usage of AI



# Theme 2

## Usage of AI

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Have you used an AI product or an AI feature on a product you use regularly? [Slide 18](#)

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Which, if any, AI products or AI features have you used for work purposes? (only shown top 8) [Slide 25](#)

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Which of the following describes why you haven't used an AI product or AI feature? [Slide 33](#)

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Do you expect you will choose to use AI in the near future? [Slide 40](#)

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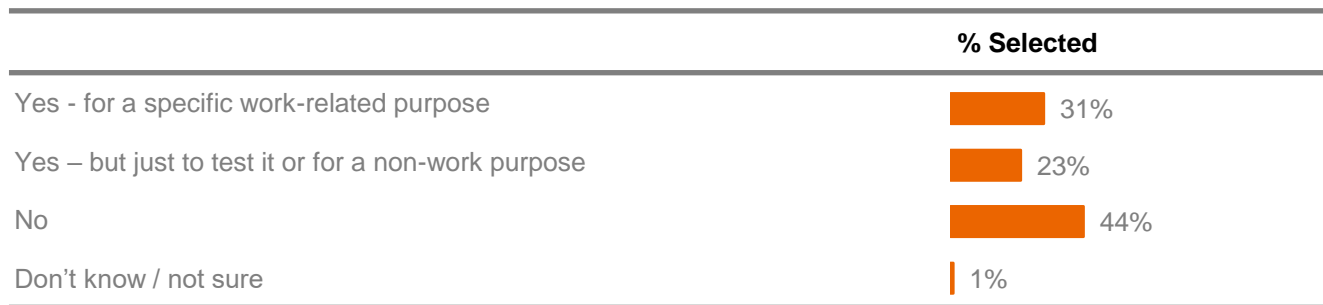
Which restrictions, if any, does your institution currently have with regards to AI usage? [Slide 47](#)

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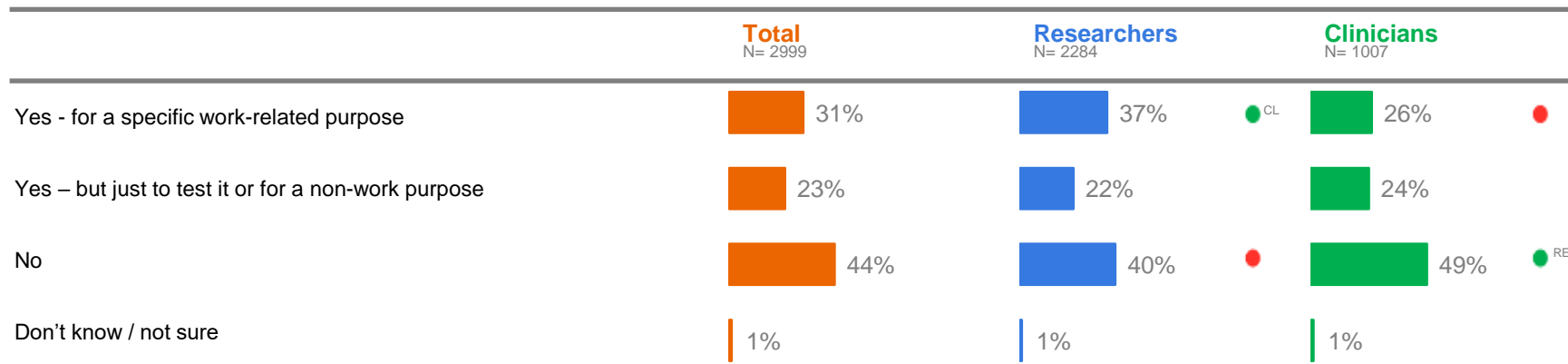
In which ways, if any, is your institution preparing for AI usage? [Slide 54](#)

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



# 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



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

Base: n= 2999

Total

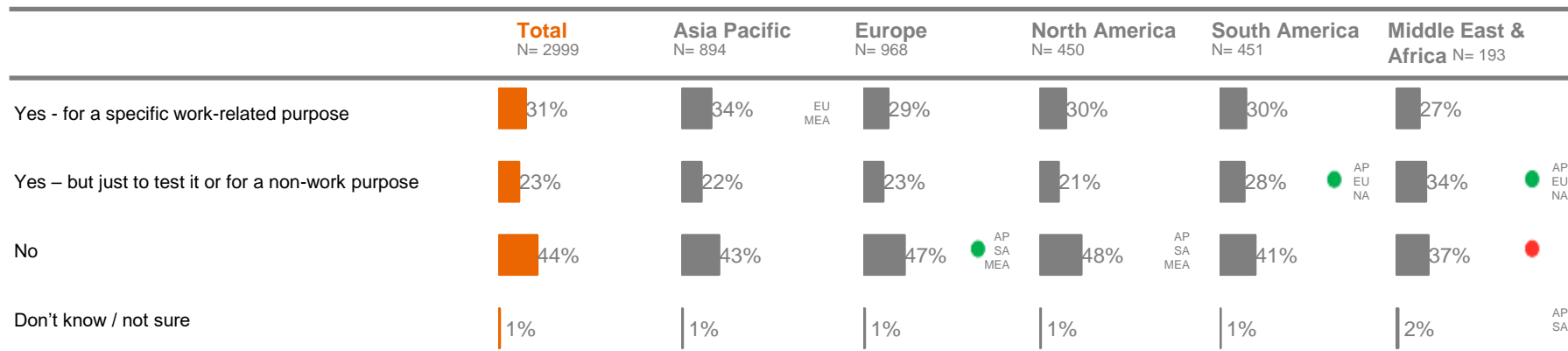
Researchers

Clinicians



Back to home

# 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



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

Total



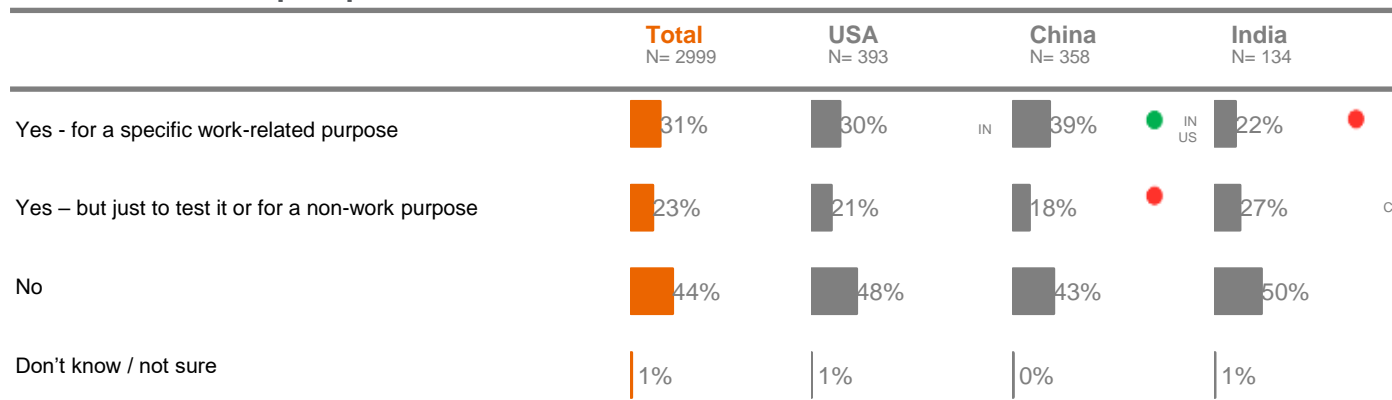
Significantly higher/ lower than...  
Significantly higher than...

● ● Global

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

Base: n= 2999

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



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

Total



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

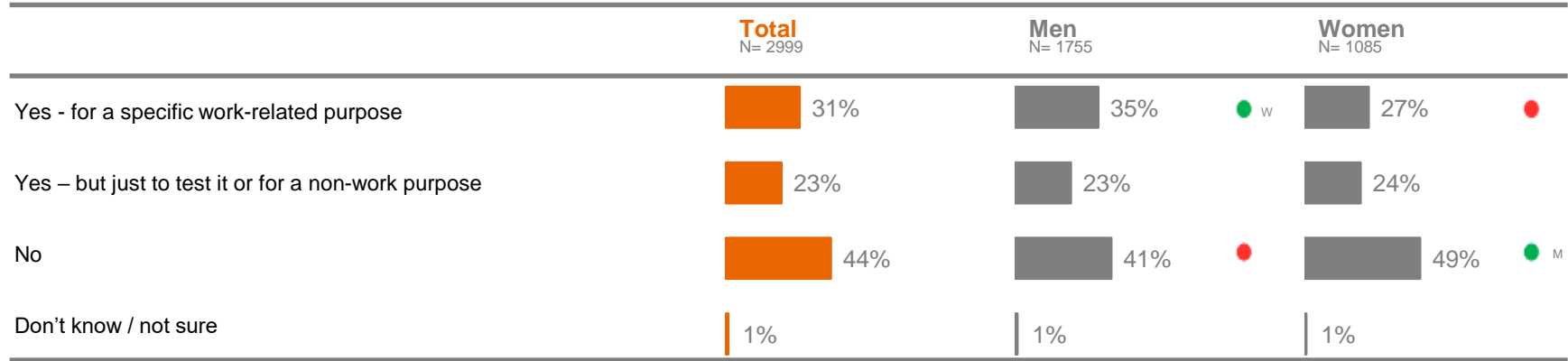


Global

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

Base: n= 2999

# 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?

Total



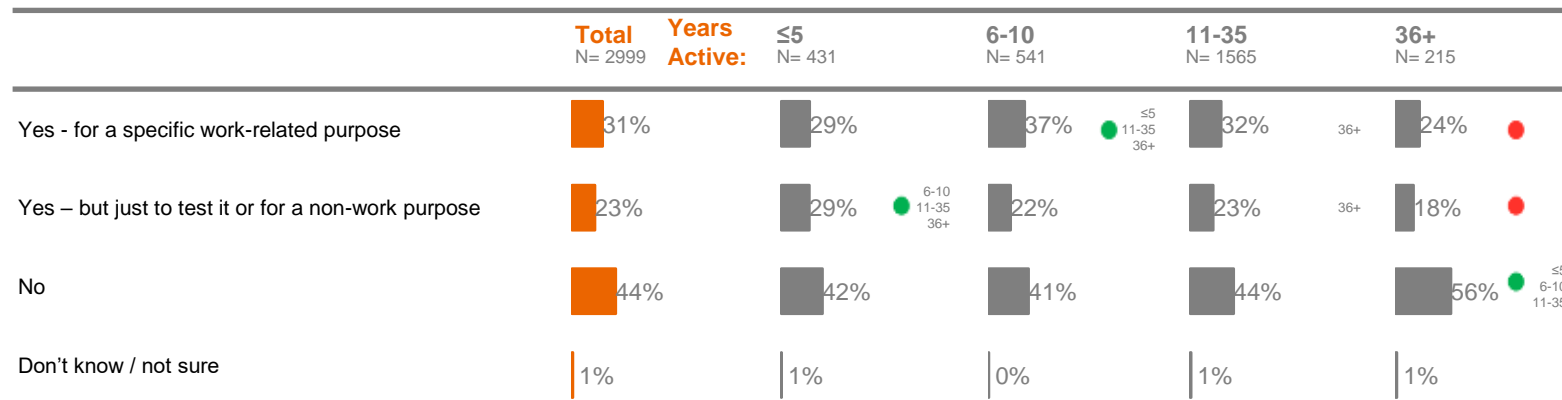
Significantly higher/ lower than...  
Significantly higher than...

• • Global

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

Base: n= 2999

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 AI



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

Total



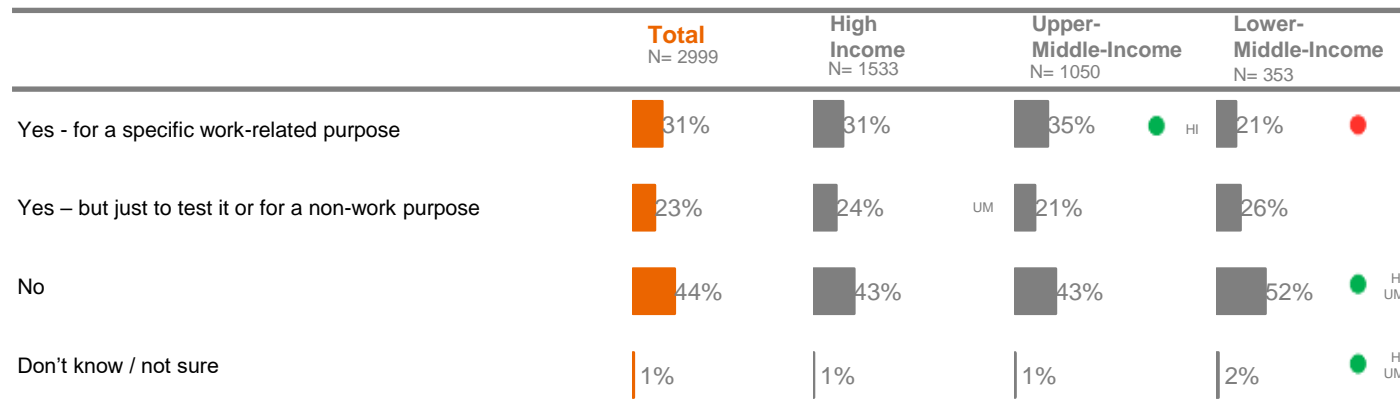
Significantly higher/ lower than...  
Significantly higher than...

● ● Global

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

Base: n= 2999

# Of those familiar with AI over 30% have used AI for work. In lower-middle-income countries work usage drops to a fifth



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

Total



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

● ● Global

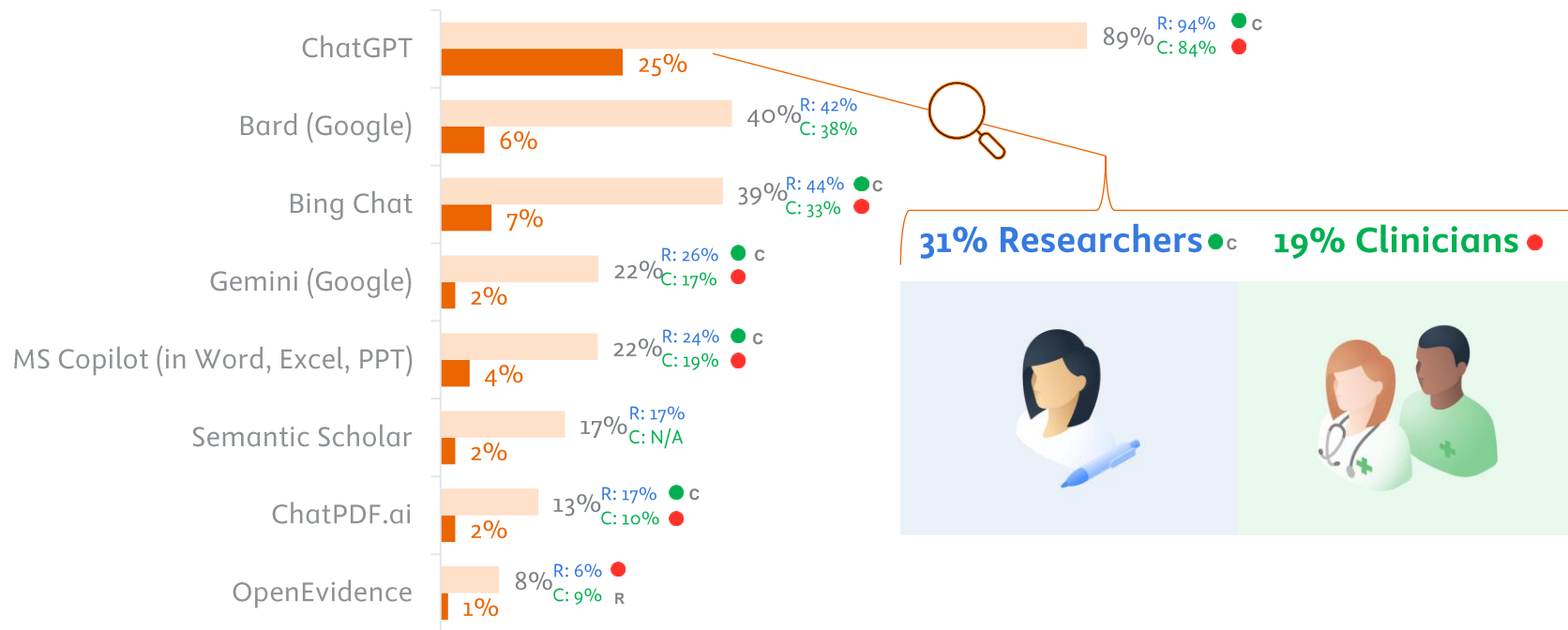
Role/ Region/ Country (indicated by first two letters e.g. AP = APAC)

Base: n= 2999



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

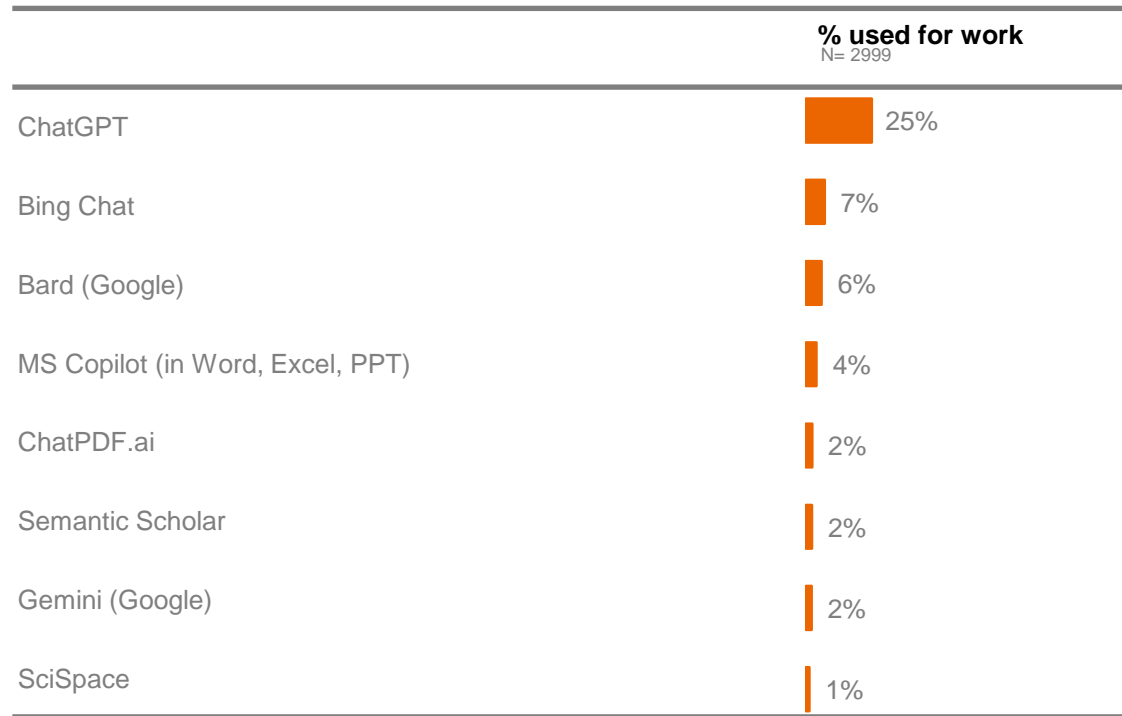
Heard of it   Used it for work



Q: Which of these AI products, if any, have you heard of before today?  
 Q: Which, if any, AI products or AI features have you used for work purposes?  
 Base: n=2,999

**Top 8 by awareness shown. Other AI tools prompted:** Llama (MetaAI), LLM Titan (Amazon), SciSpace, Merative (IBM Watson Health), OpenAlex, Elicit, Med-PaLM, Claude (Anthropic), Article crafter, Scite.ai, Paper Digest, Hippocratic AI, Bloom One (Bloom AI), Iris ai, EvidenceHunt, Consensus, GlassHealth, Jenni, Lateral.io

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



Note: Only top 8 products shown

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

**Total**



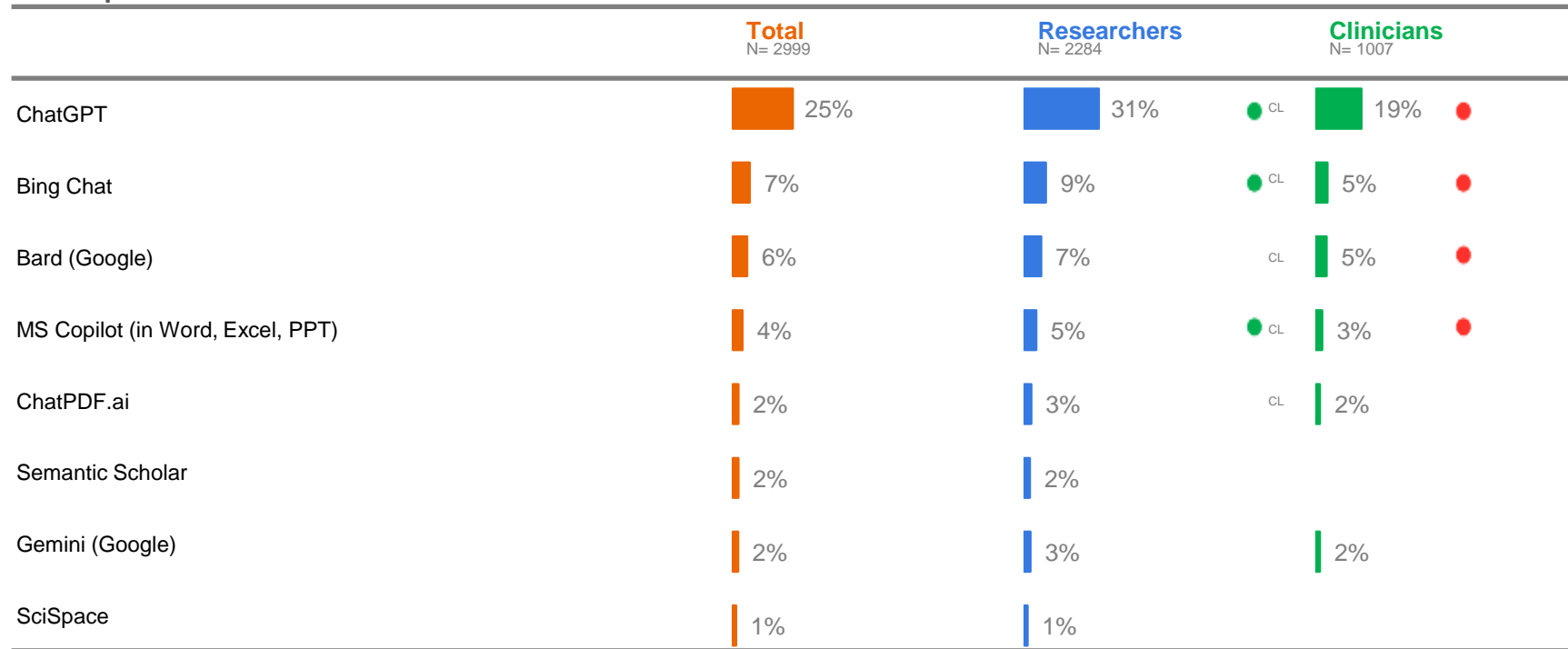
Significantly higher/ lower than ...  
Significantly higher than ...

● ● Global

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

Base: n= 2999

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

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

Base: n= 2999

Total

Researchers

Clinicians

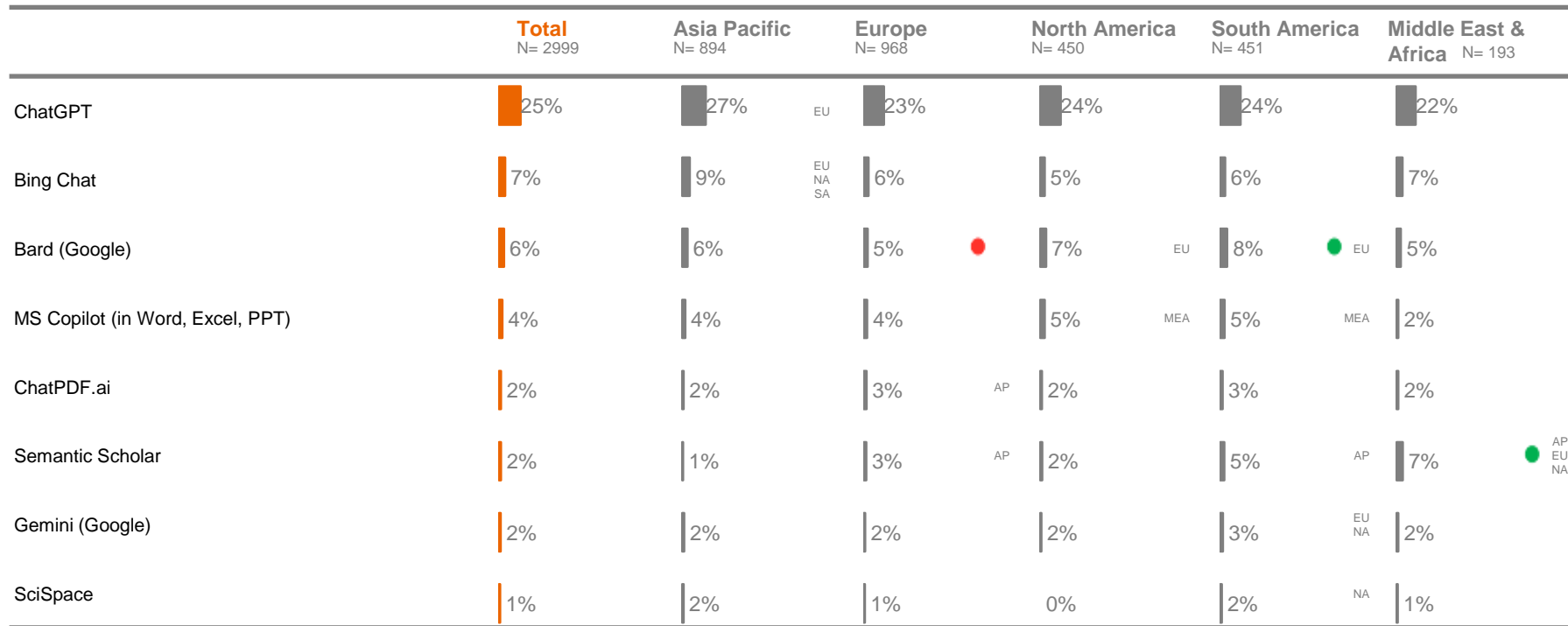


Significantly higher/ lower than...  
Significantly higher than...

  Global

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

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



Note: Only top 8 products shown

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

Base: n= 2999

Total

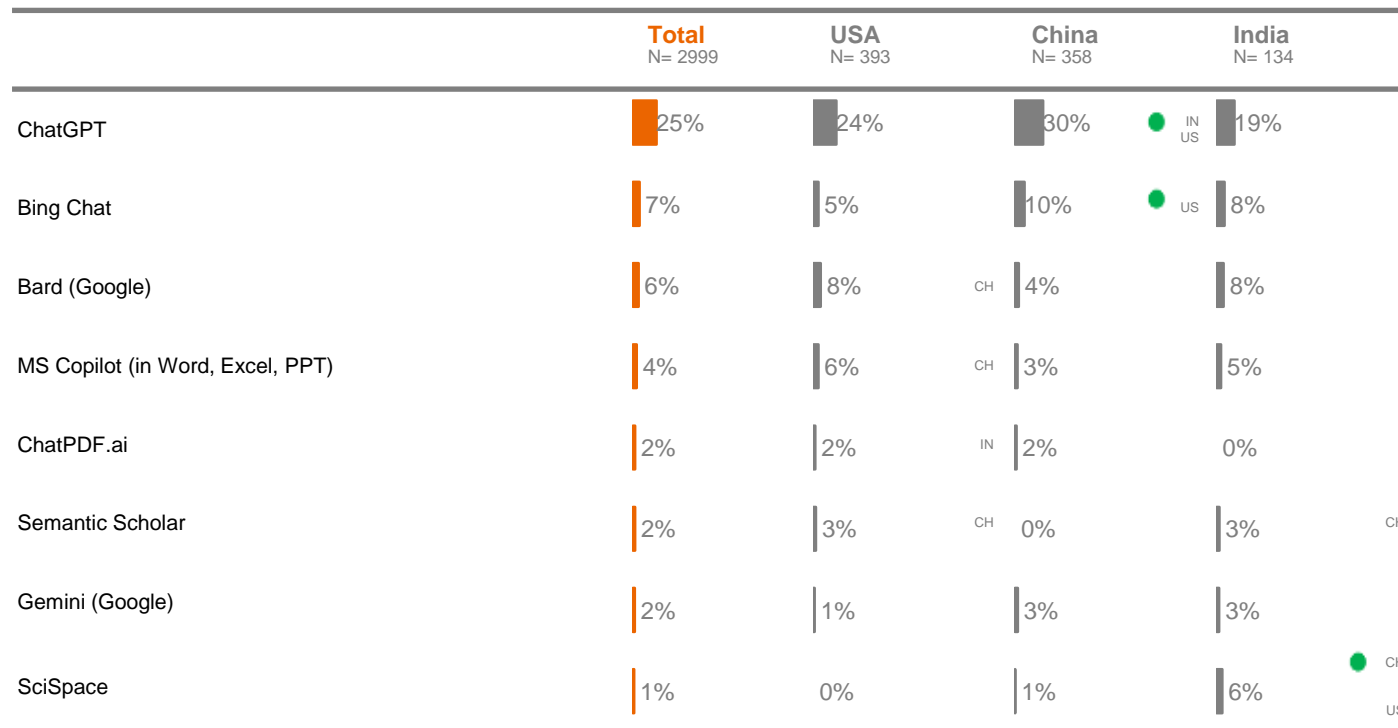


Significantly higher/ lower than...  
Significantly higher than...

● ● Global

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

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



Note: Only top 8 products shown

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

Base: n= 2999

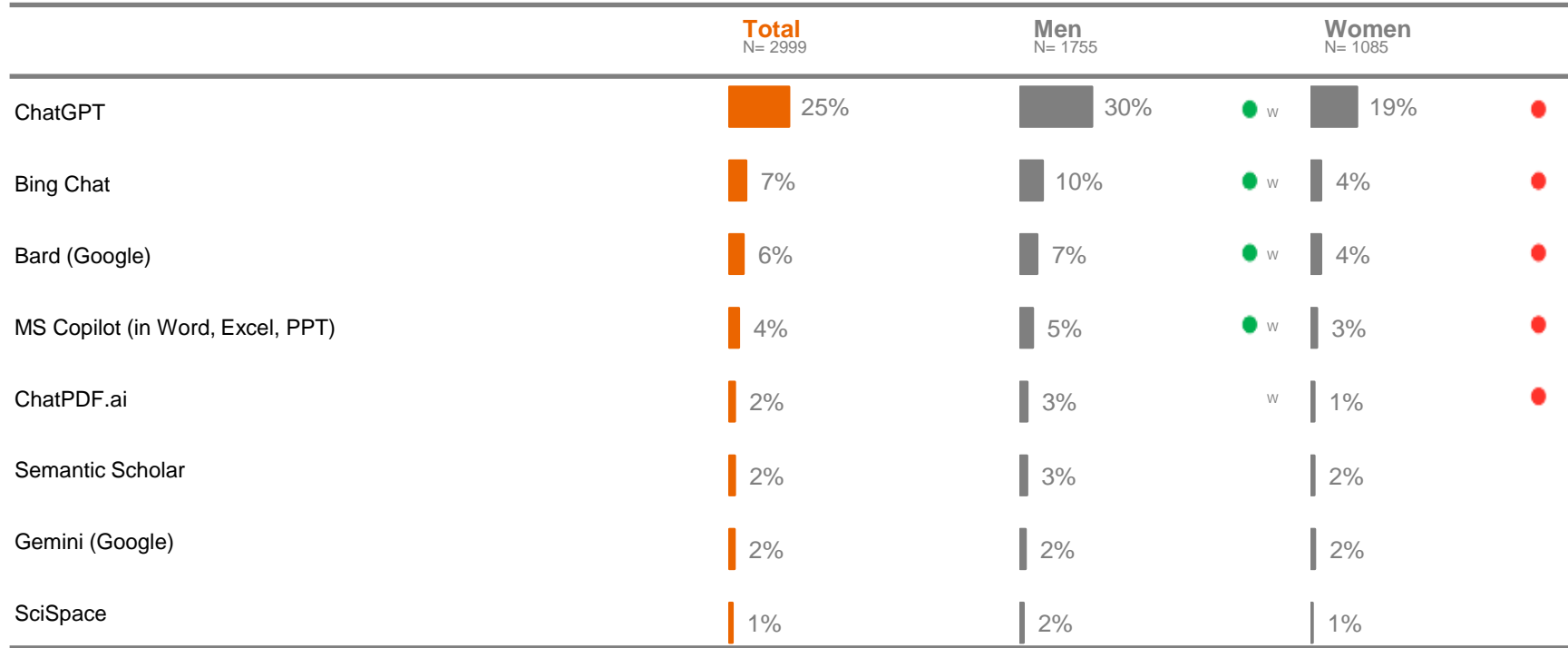
Total



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

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

# AI tools generally more used for work purposes by men than women



Note: Only top 8 products shown

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

Total



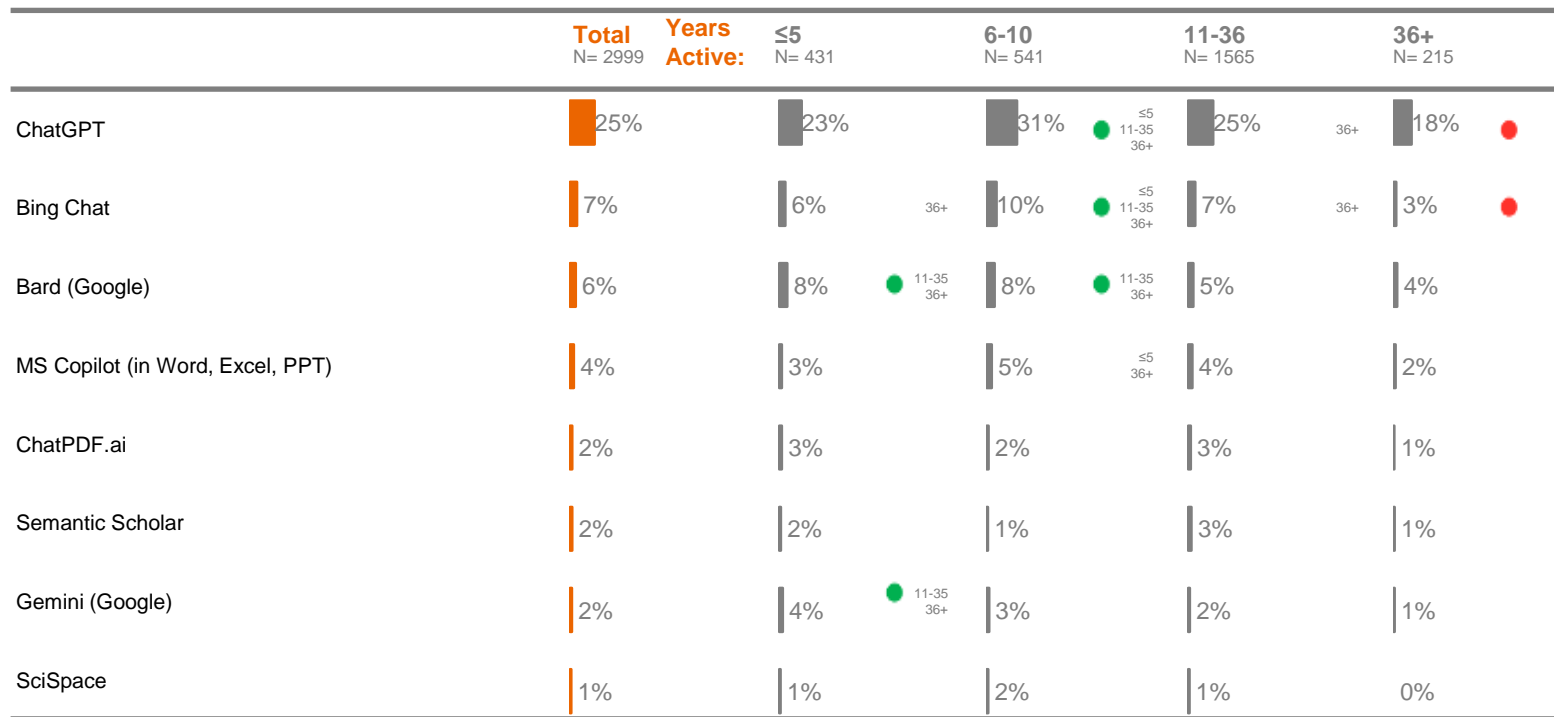
Significantly higher/ lower than...  
Significantly higher than...

  Global

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

Base: n= 2999

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



Note: Only top 8 products shown

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

Total



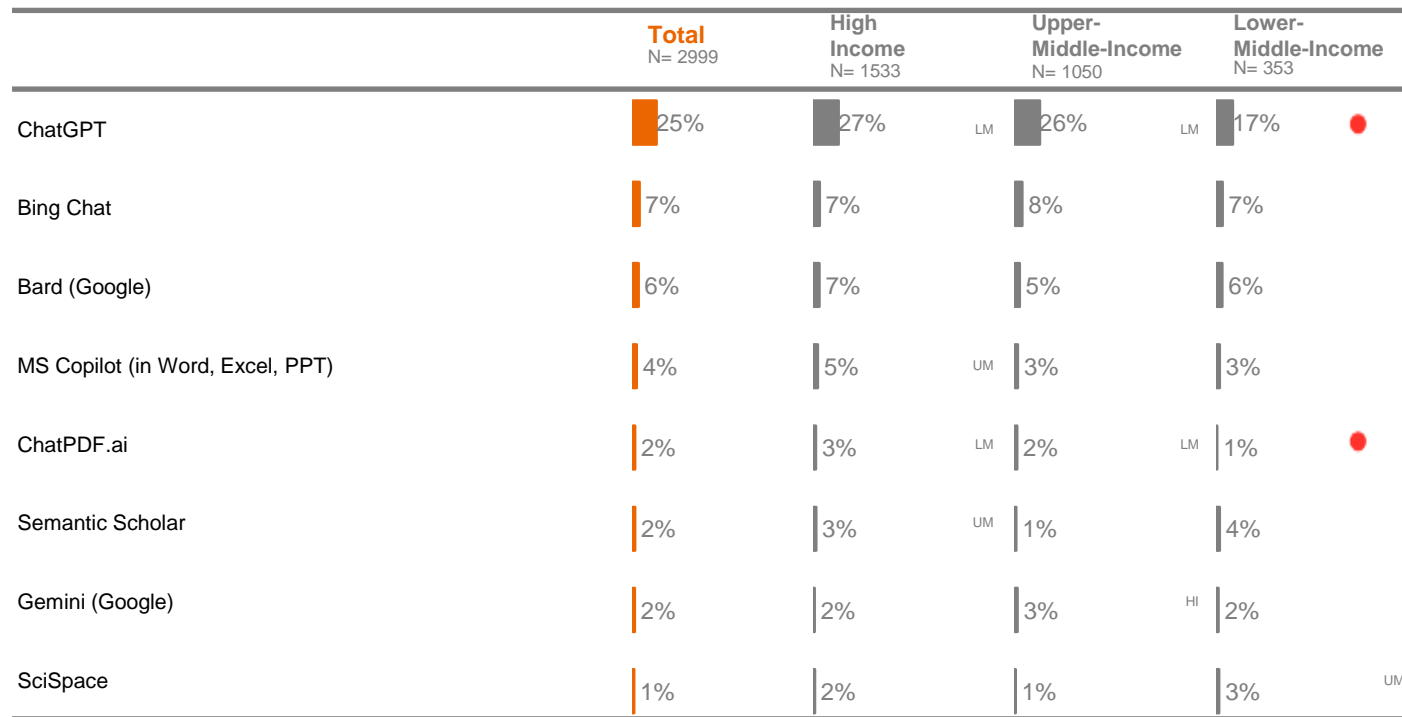
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Significantly higher than...

● ● Global

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

Base: n= 2999

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



Note: Only top 8 products shown

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

Total



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

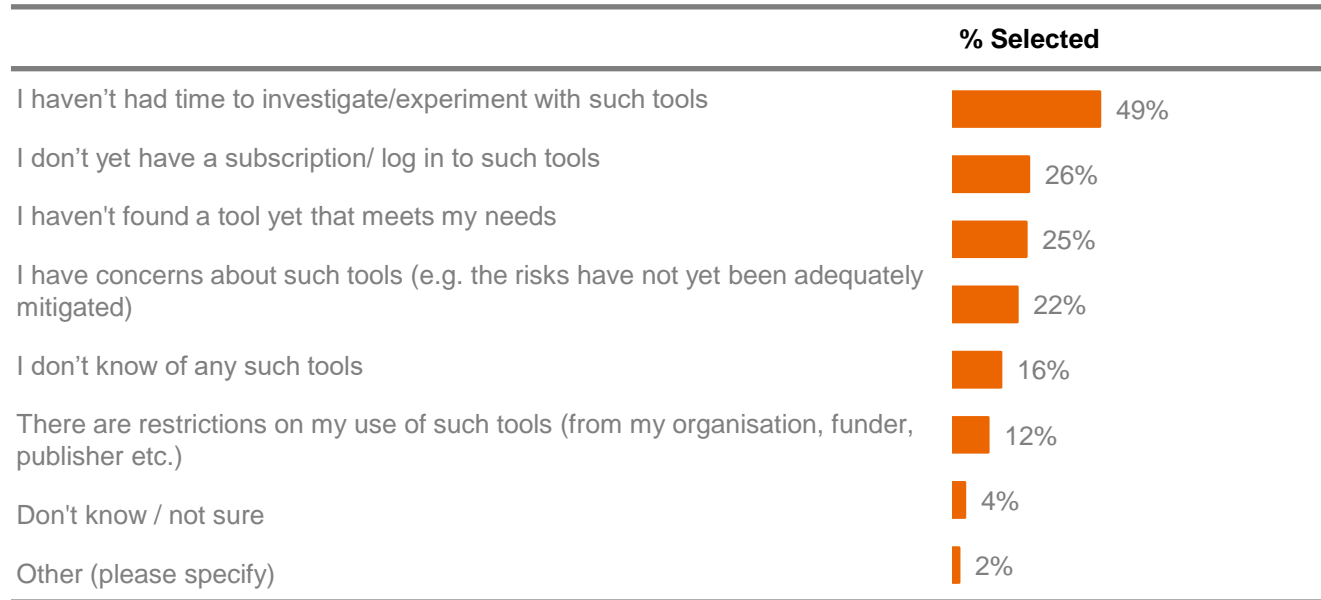
● ● Global

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

Base: n= 2999



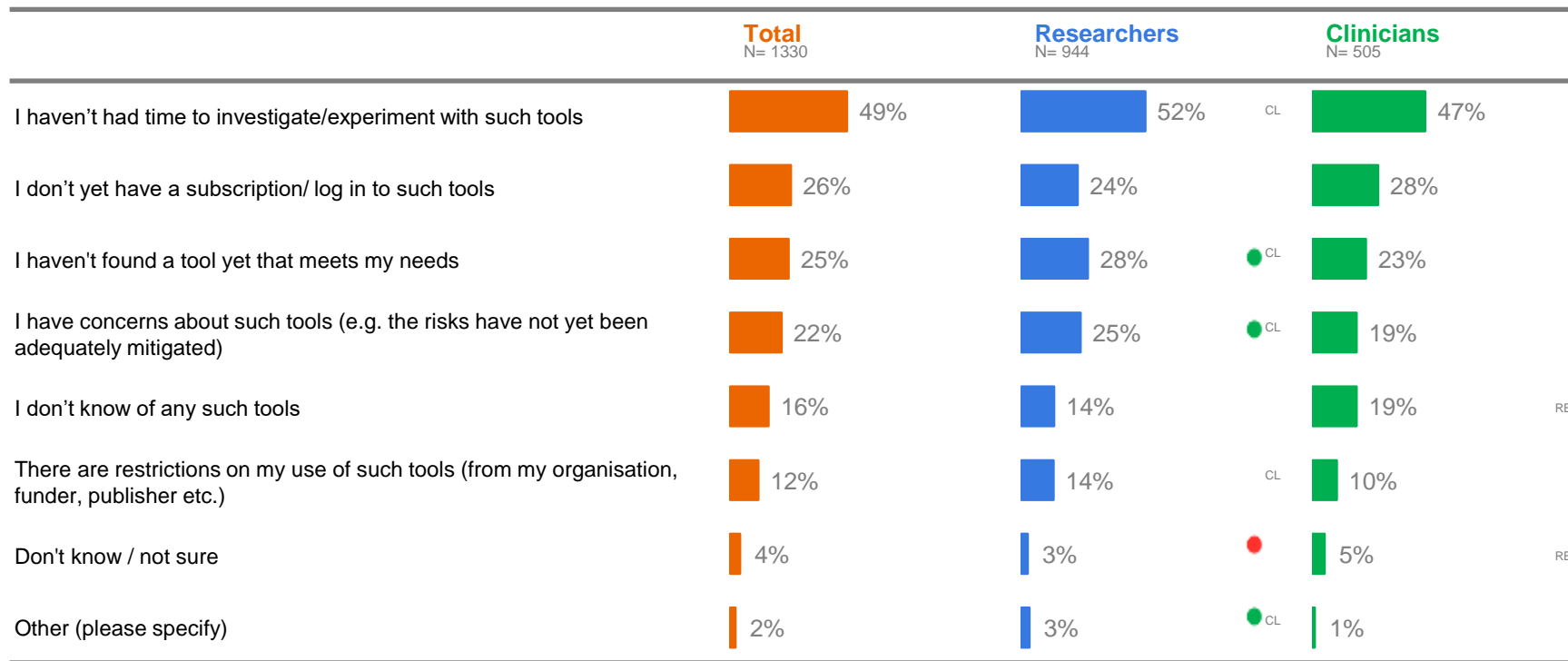
# The most common reason for those who haven't used AI is they haven't had time to investigate or experiment with it



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

Base: n= 1330

# 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?

Base: n= 1330

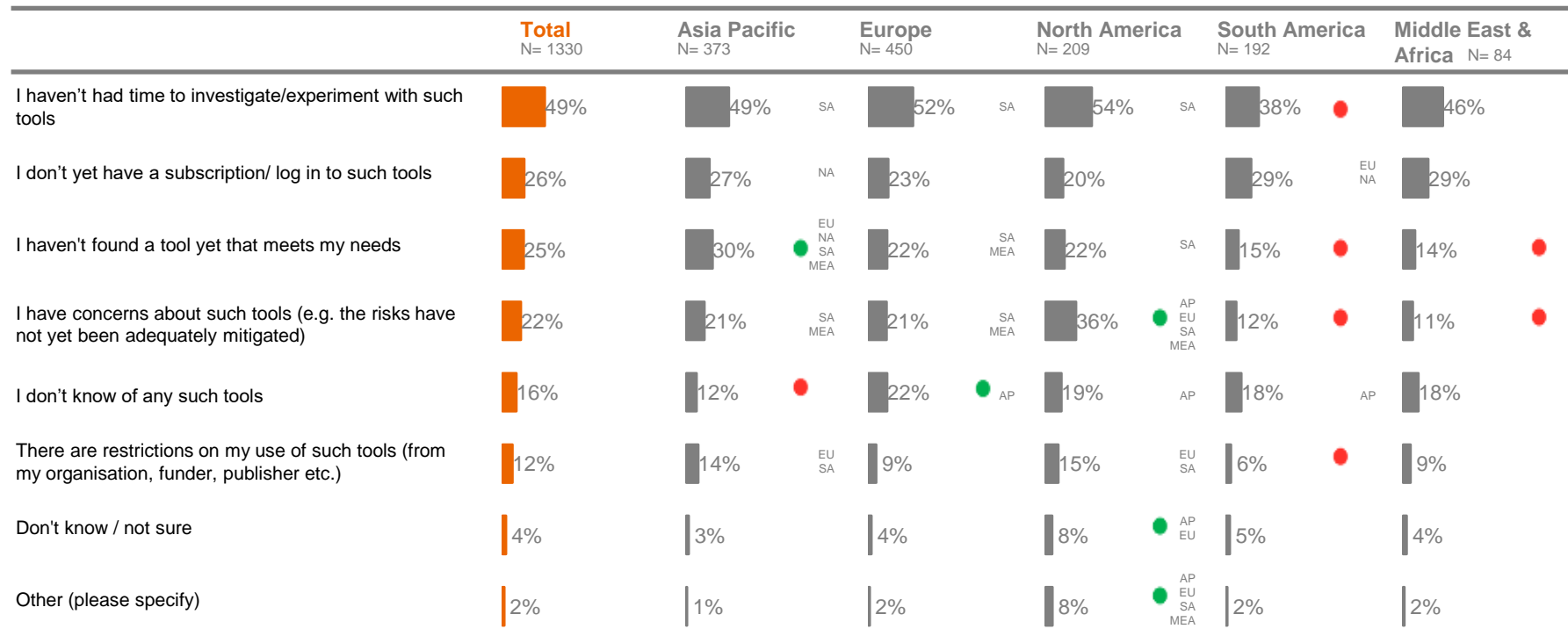
Total

Researchers

Clinicians



# 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 AI tools



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

Total



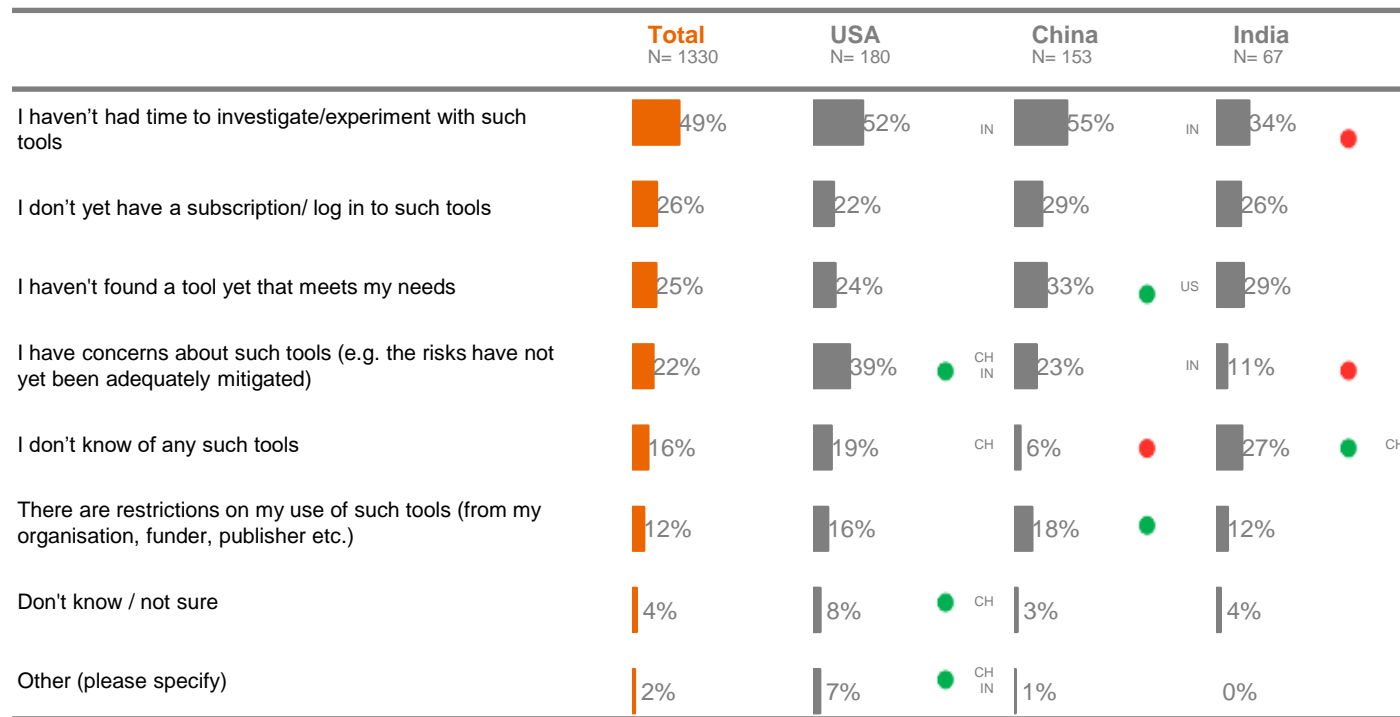
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Significantly higher than...

● ● Global

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

Base: n= 1330

# 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



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

Total

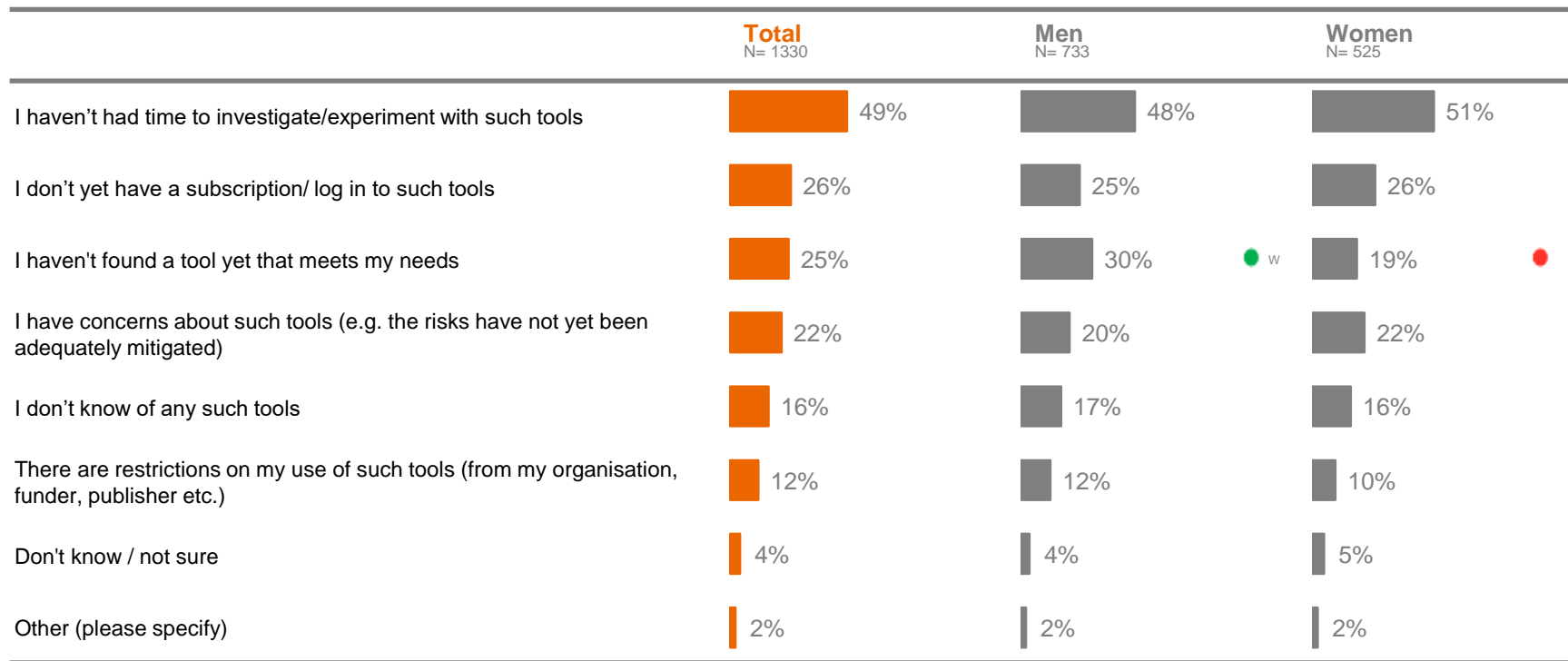


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Significantly higher than...

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

Base: n= 1330

# 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 AI tool that meets their needs



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

Total



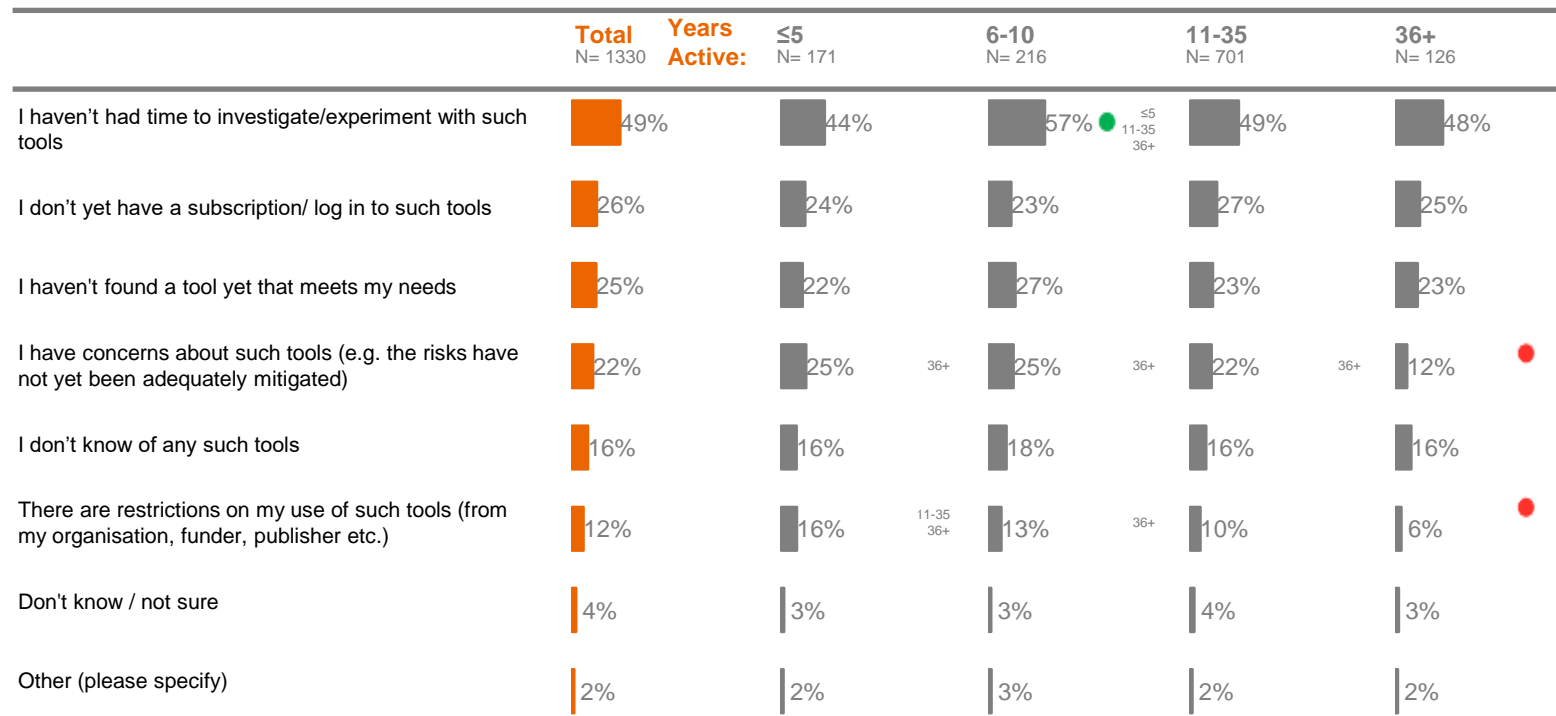
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Significantly higher than ...

● ● Global

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

Base: n= 1330

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



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

Total



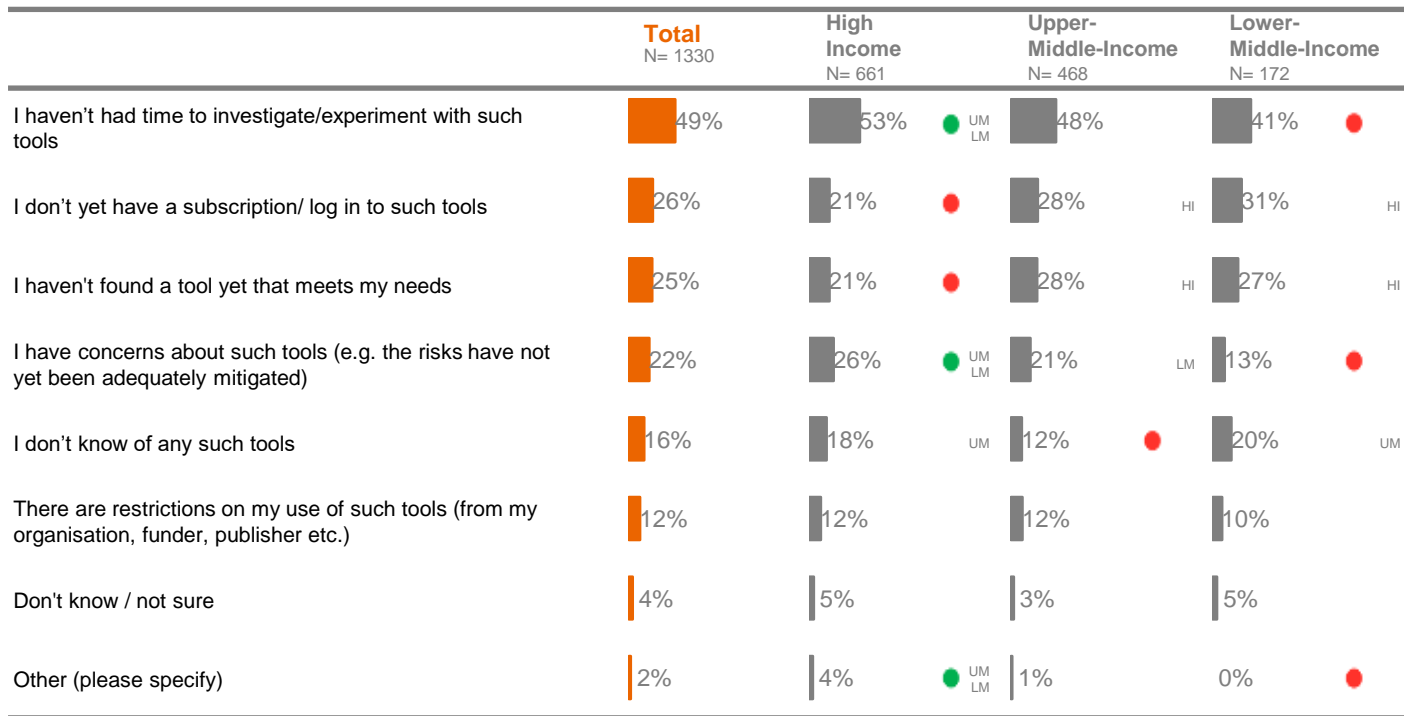
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Global  
Role/ Region/ Country (indicated by first two letters e.g. AP = APAC)

Base: n= 1330

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



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

Total



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

Global

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

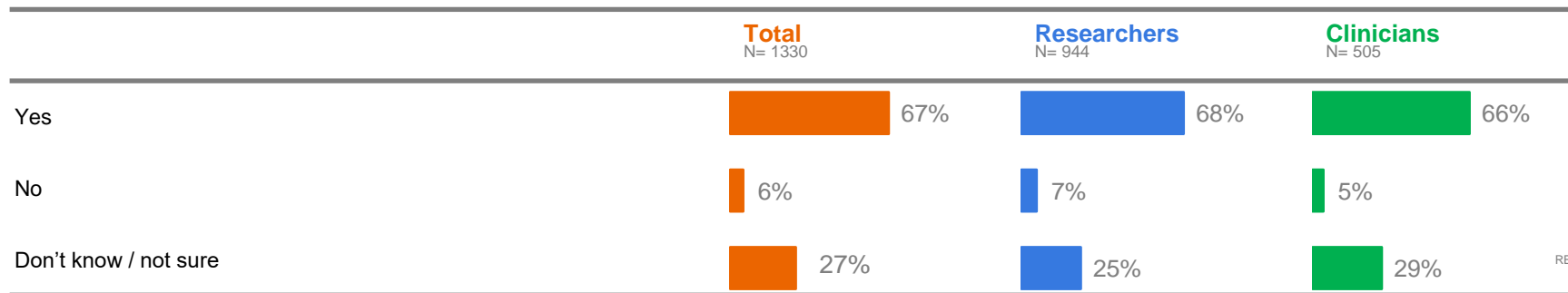
Base: n= 1330

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



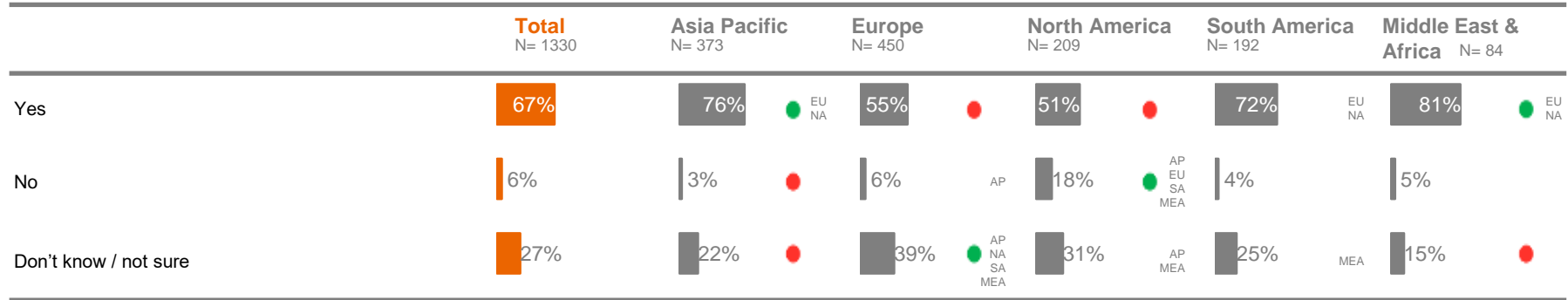


# Around two-thirds of those who haven't used AI expect to use it within the next two to five years, similar levels across researchers and clinicians

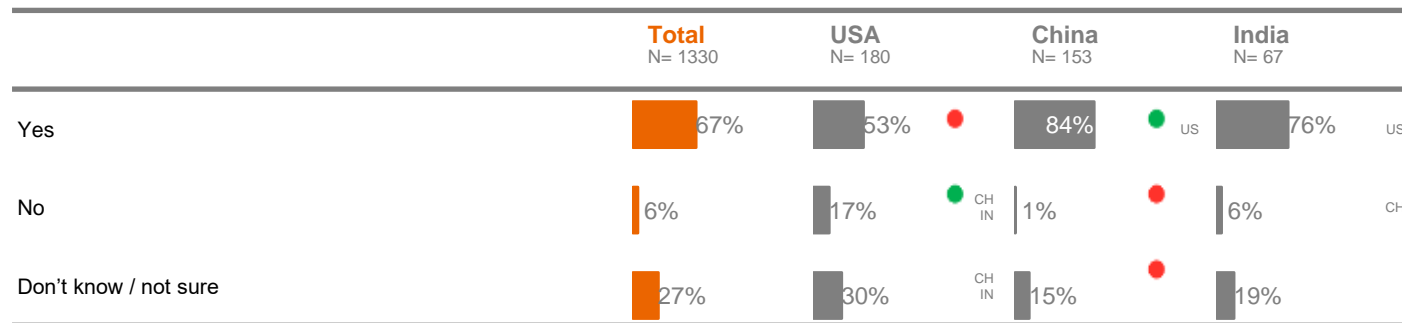


RE

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



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 AI in the near future?

Total

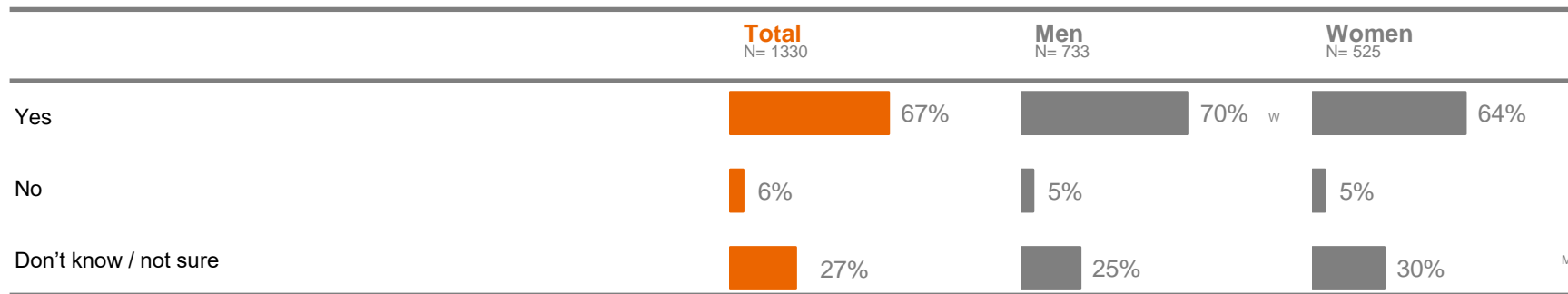


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Significantly higher than...

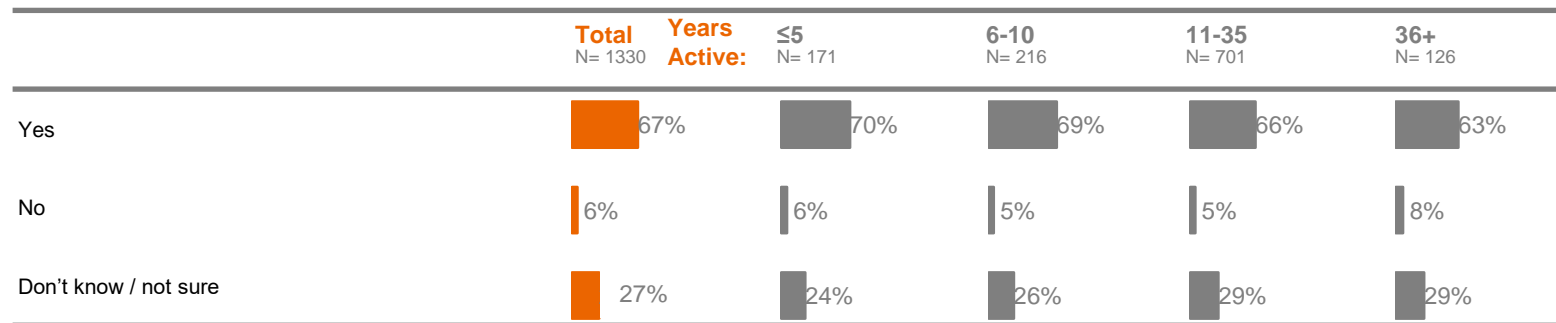
● ● Global  
Role/ Region/ Country (indicated by first two letters e.g. AP = APAC)

Base: n= 1330

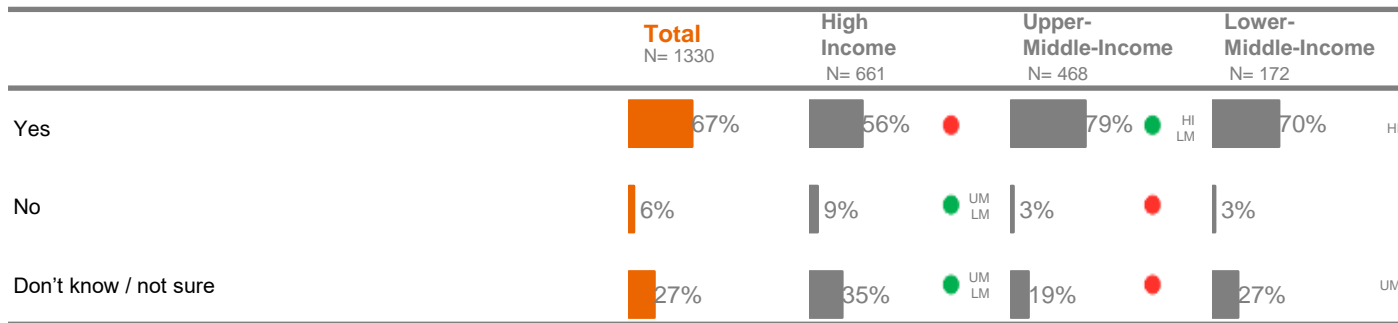
# Of those who haven't used it, women are less sure if they'll use it within the next two to five years



# 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



# Those in high income countries are the least likely to choose to use AI 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?

Total



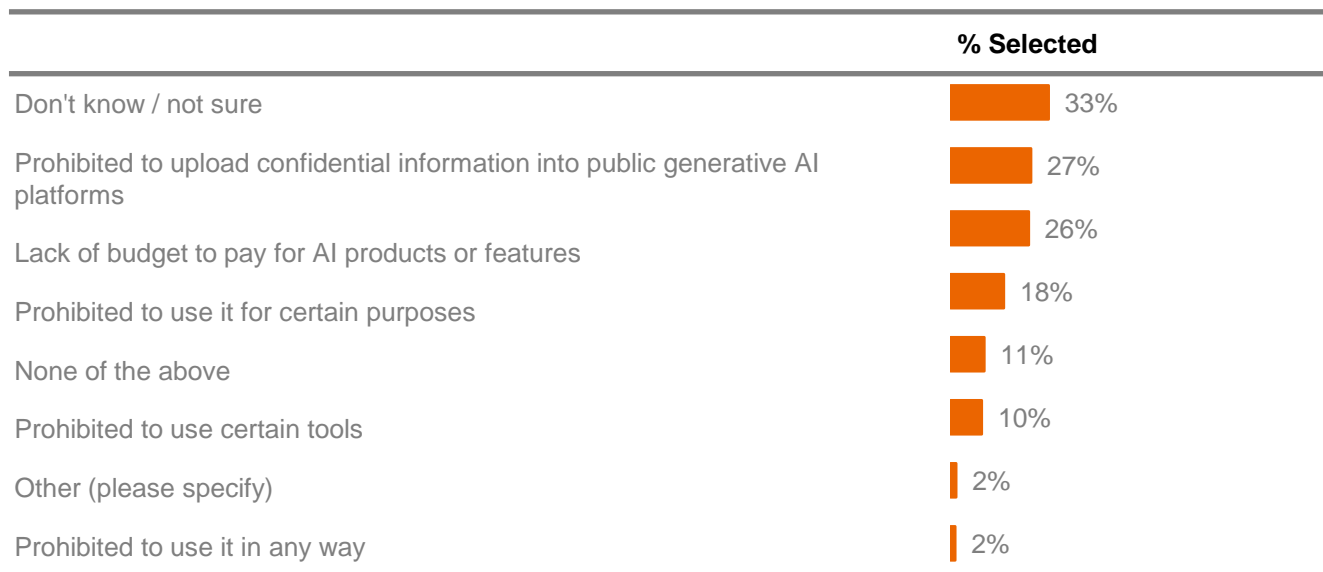
Significantly higher/ lower than...  
 Significantly higher than...

● Global

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

Base: n= 1330

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

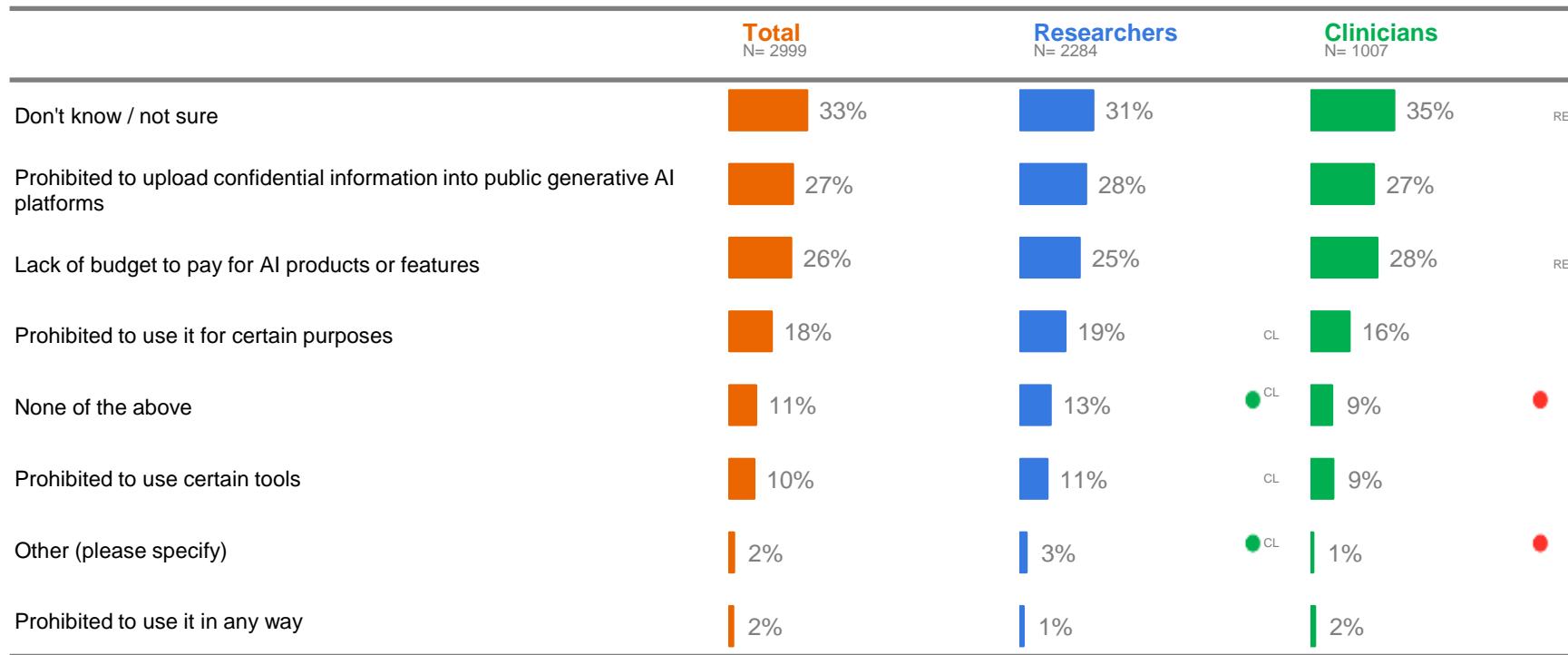


Questions: Which restrictions, if any, does your institution currently have with regards to AI usage?

Select: all that apply

Base: n= 2999

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



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

Select: all that apply

Base: n= 2999

Total

Researchers

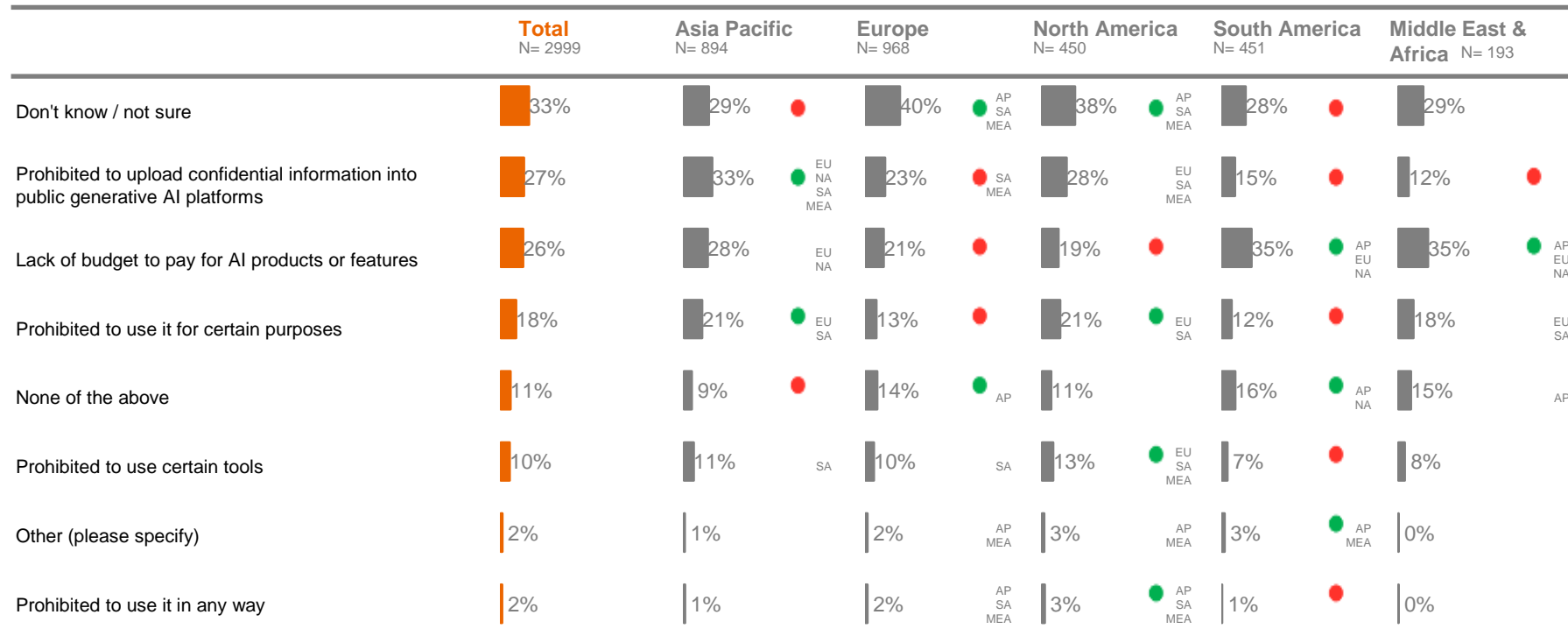
Clinicians



Back to home



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



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

Base: n= 2999

Total



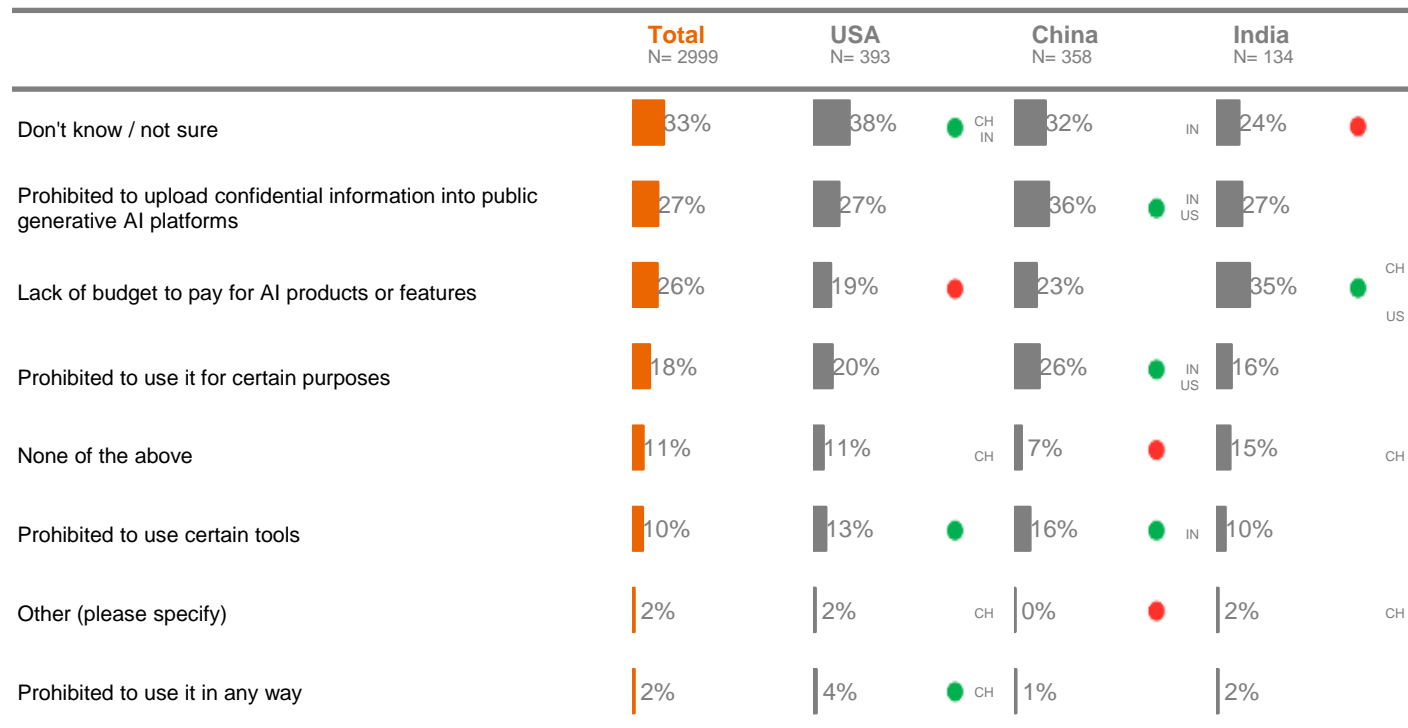
Significantly higher/ lower than...  
Significantly higher than...

● ● Global

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

Back to home

# 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



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

Base: n= 2999

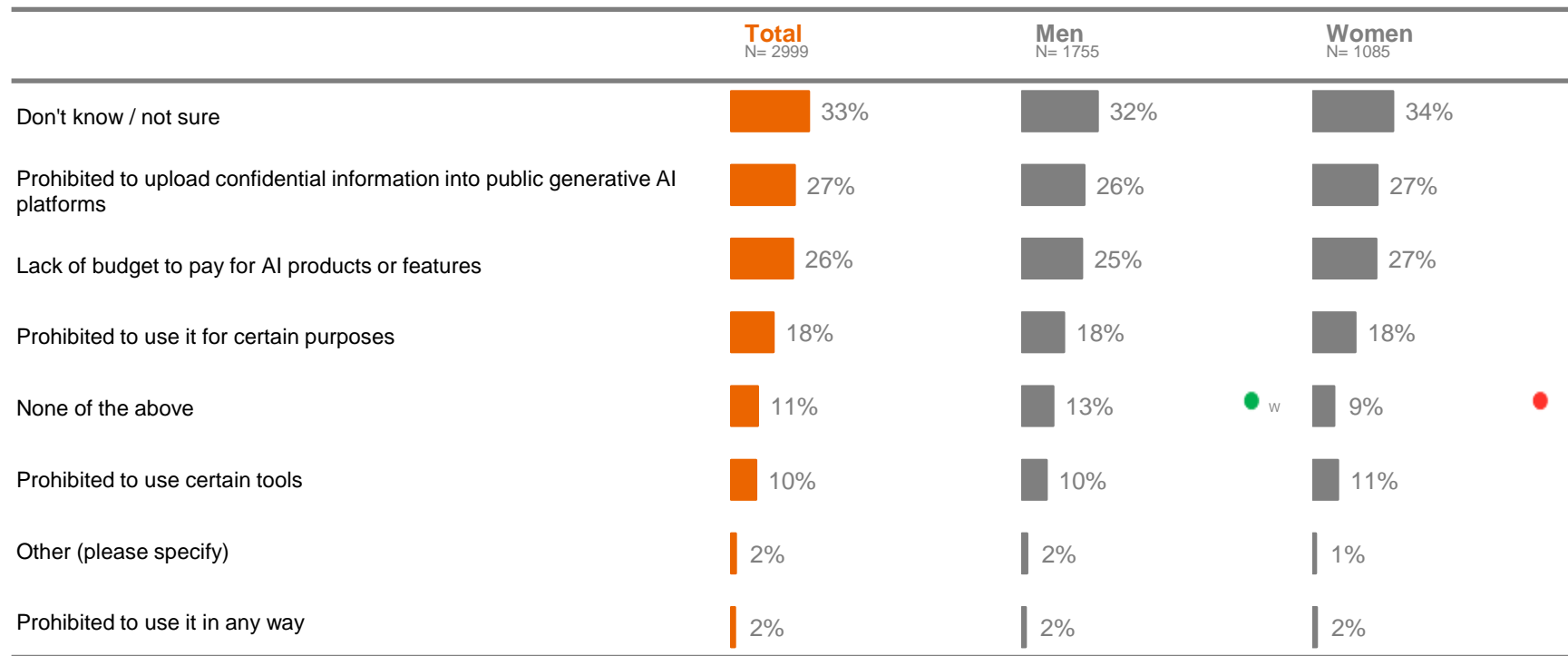
Total



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

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

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



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

Total



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Significantly higher than ...

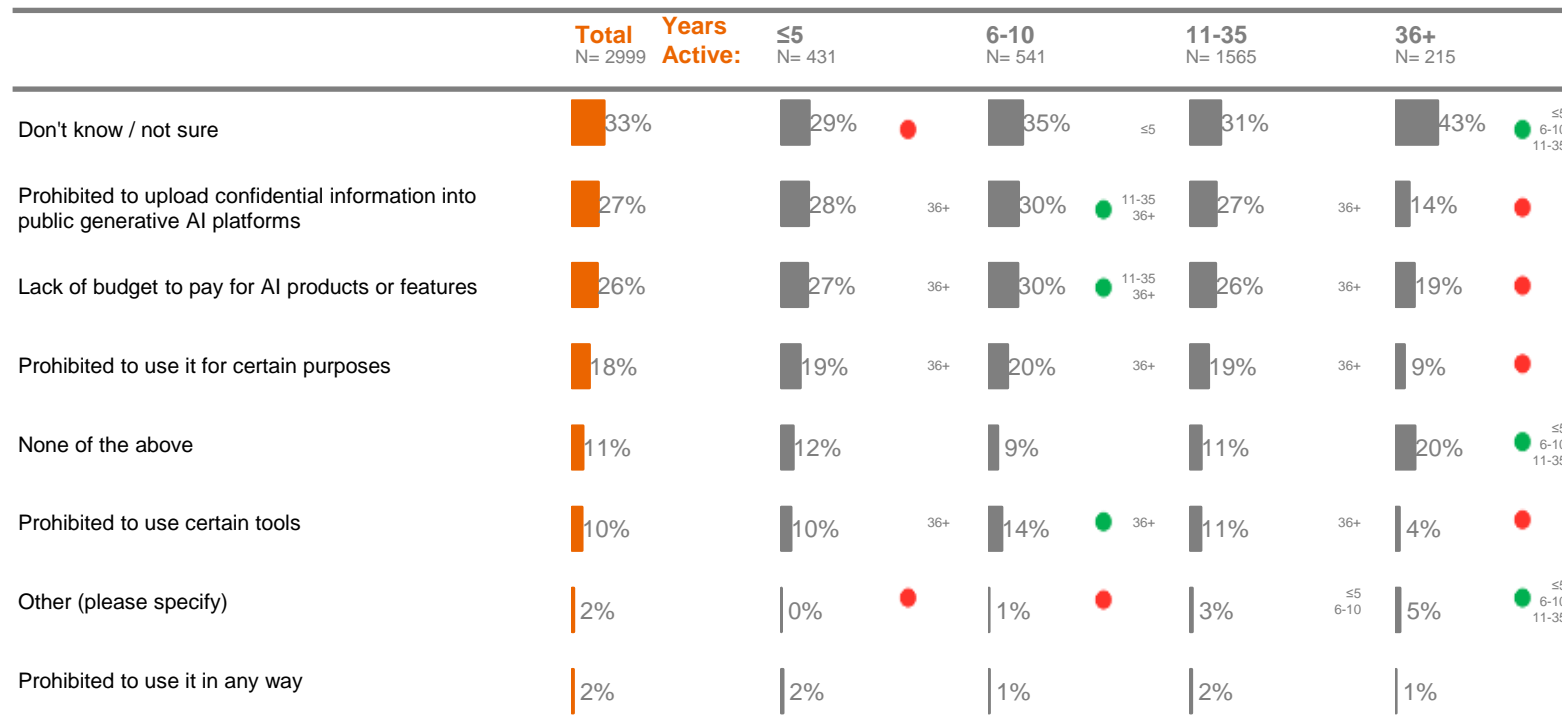
  Global

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

Select: all that apply

Base: n= 2999

# 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



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

Total



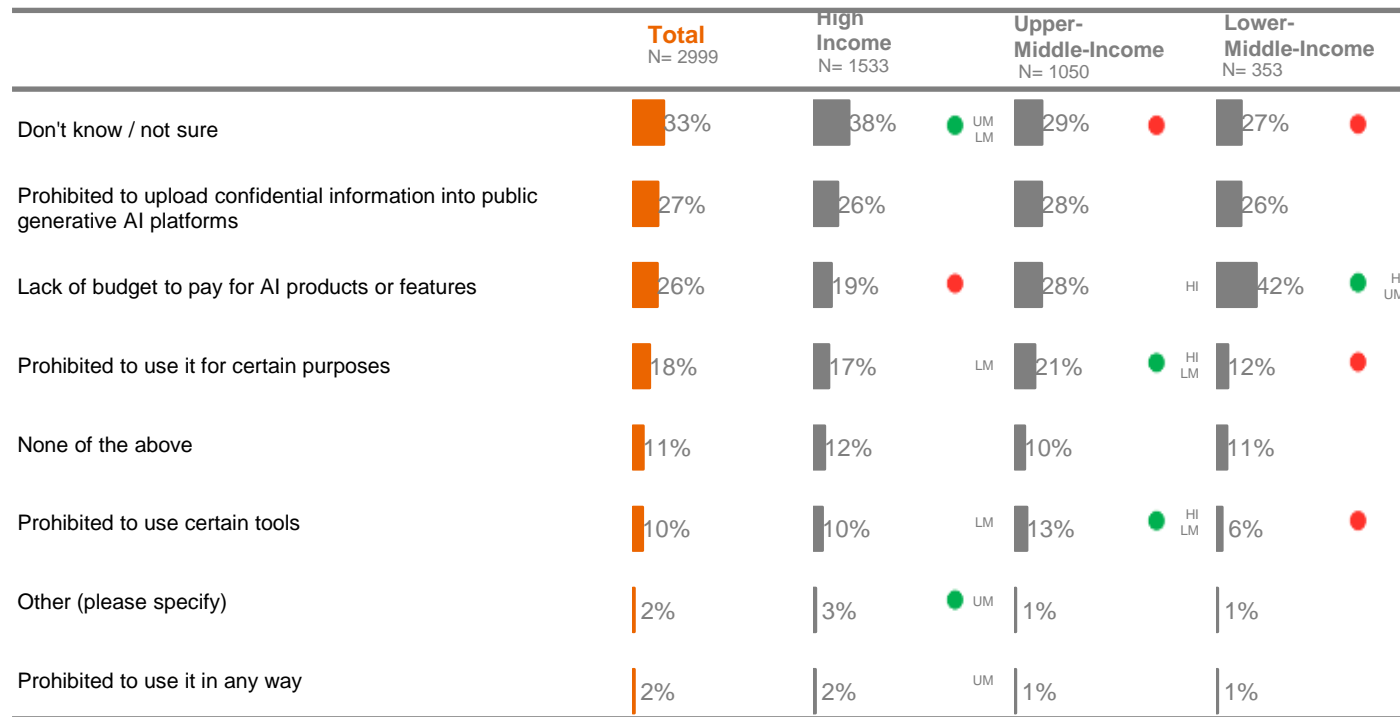
Significantly higher/ lower than...  
Significantly higher than...

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

Select: all that apply

Base: n= 2999

# 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



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

Total



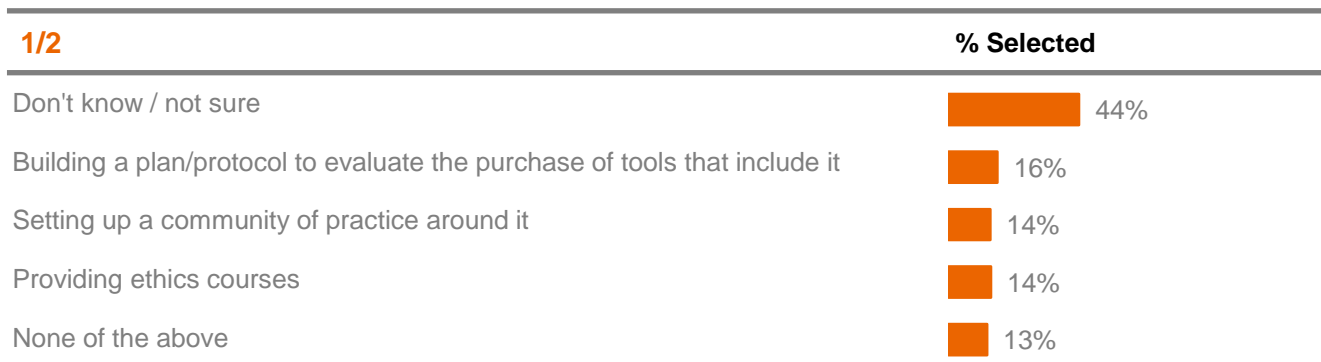
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Significantly higher than...

● ● Global

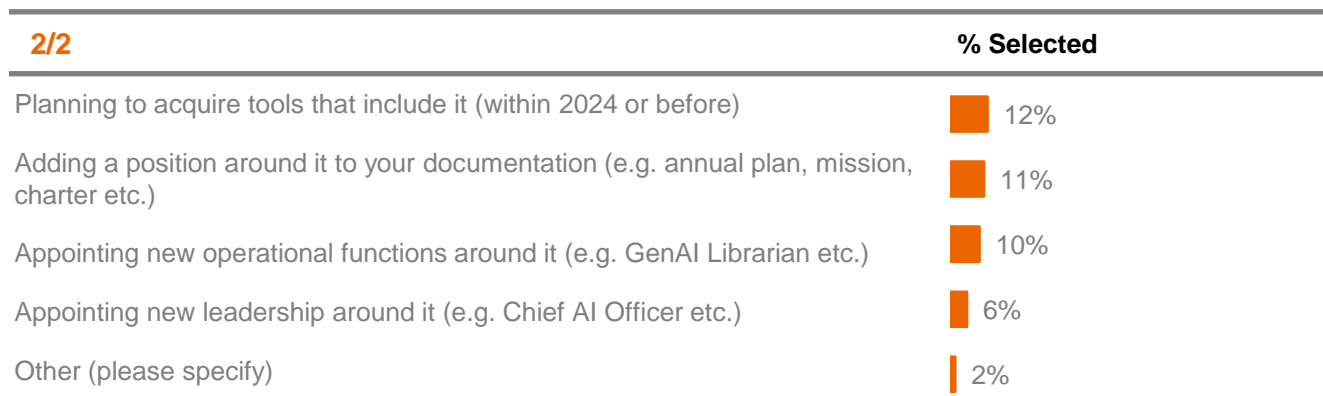
Role/ Region/ Country (indicated by first two letters e.g. AP = APAC)

Base: n= 2999

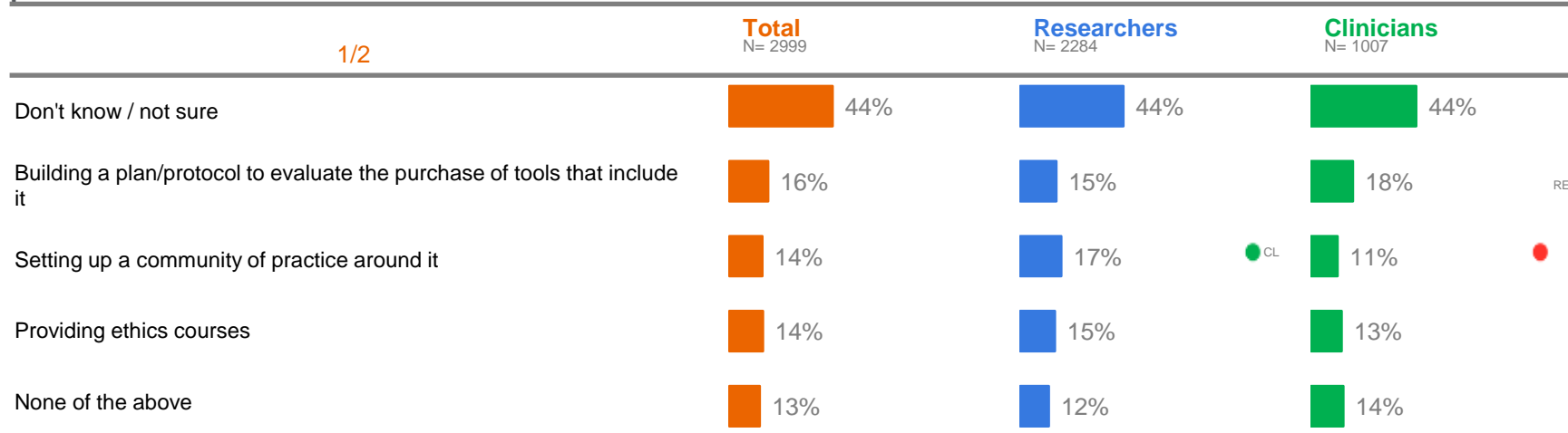
# Many are unsure how their institution is preparing for AI usage



# It is uncommon for institutions to be appointing new AI leadership



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



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

Select: all that apply

Base: n= 2999

Total

Researchers

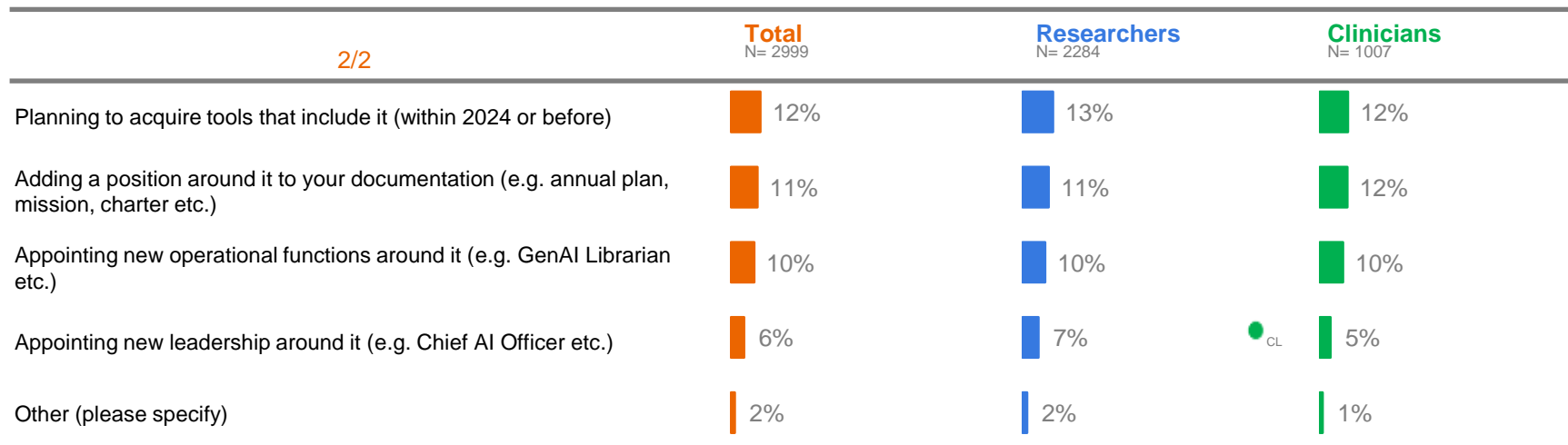
Clinicians



Back to home



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



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

Select: all that apply

Base: n= 2999

Total

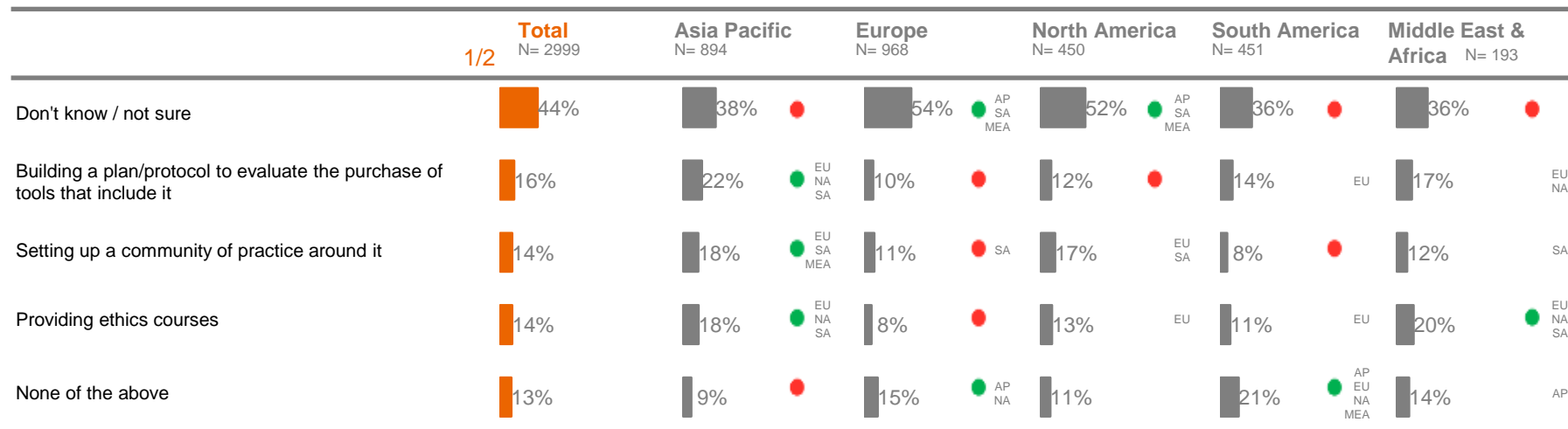
Researchers

Clinicians



Back to home

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



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

Total



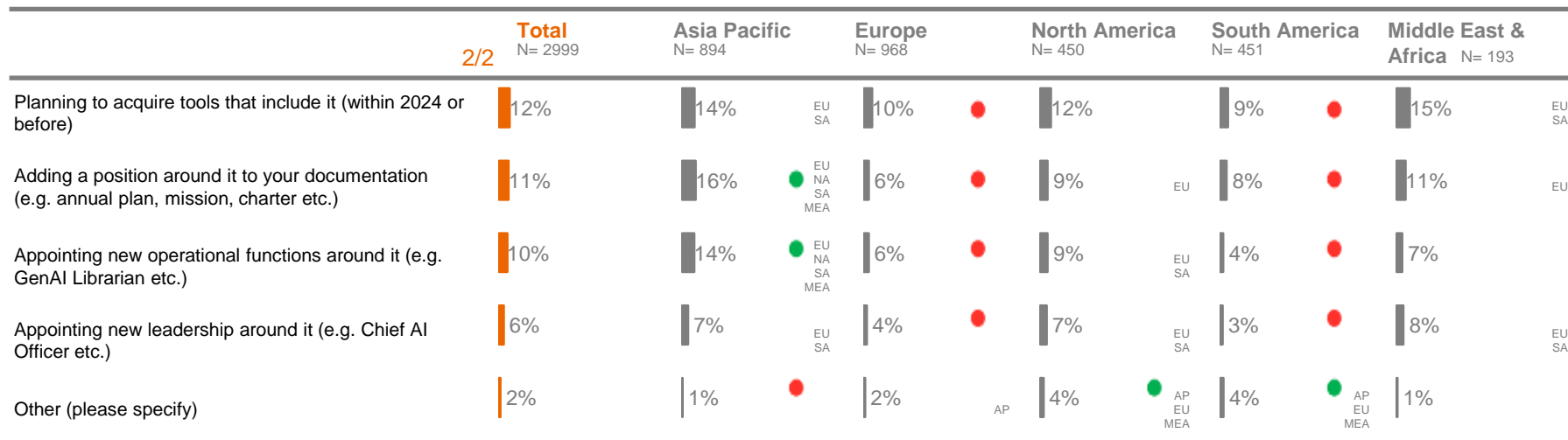
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Significantly higher than...

● ● Global

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

Base: n= 2999

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



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

Select: all that apply

Total



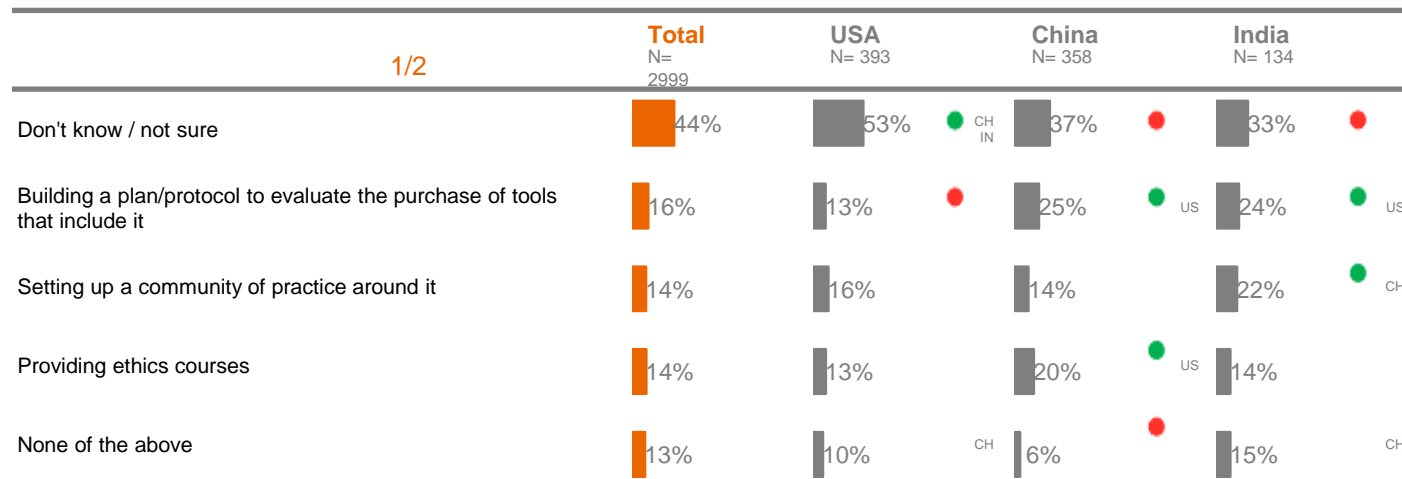
Significantly higher/ lower than...  
Significantly higher than...

● ● Global

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

Base: n= 2999

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



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

Total

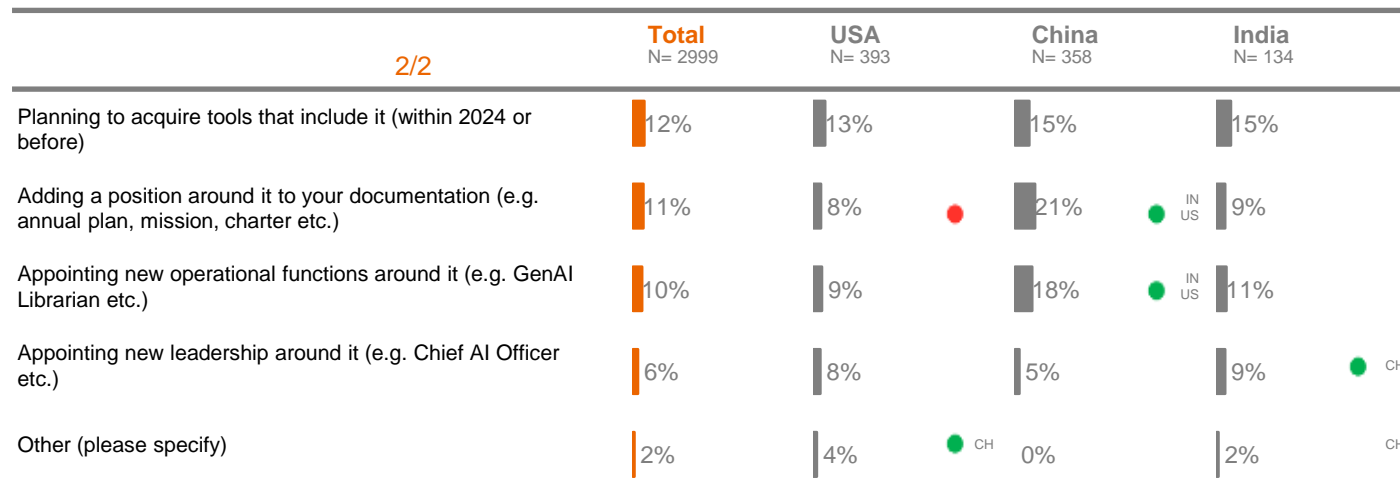


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Significantly higher than...

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

Base: n= 2999

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



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

Select: all that apply

Total



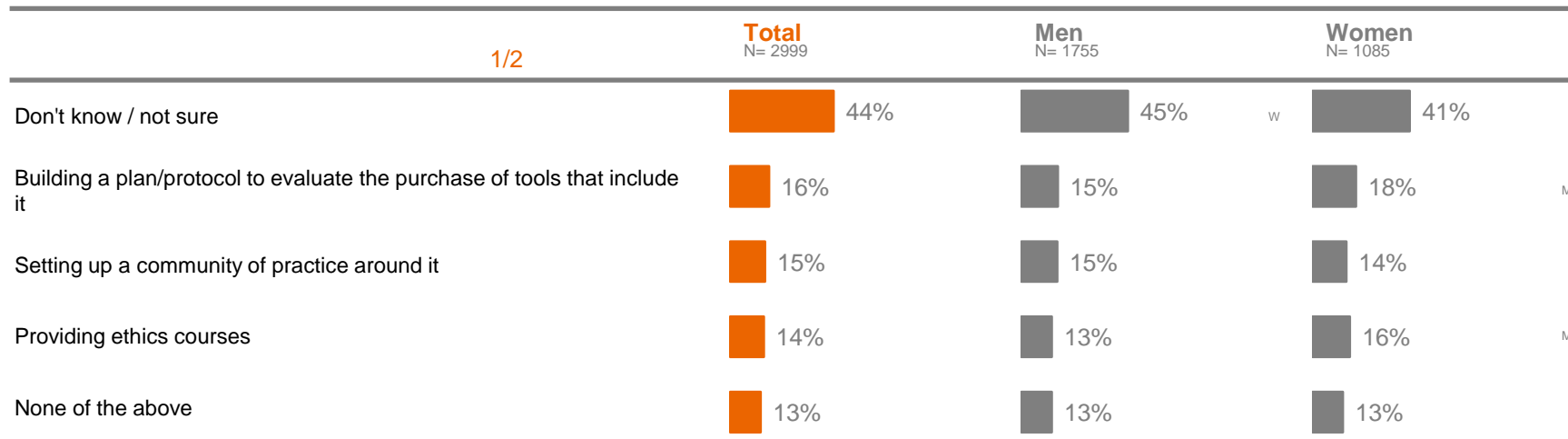
Significantly higher/ lower than...  
Significantly higher than...

● ● Global

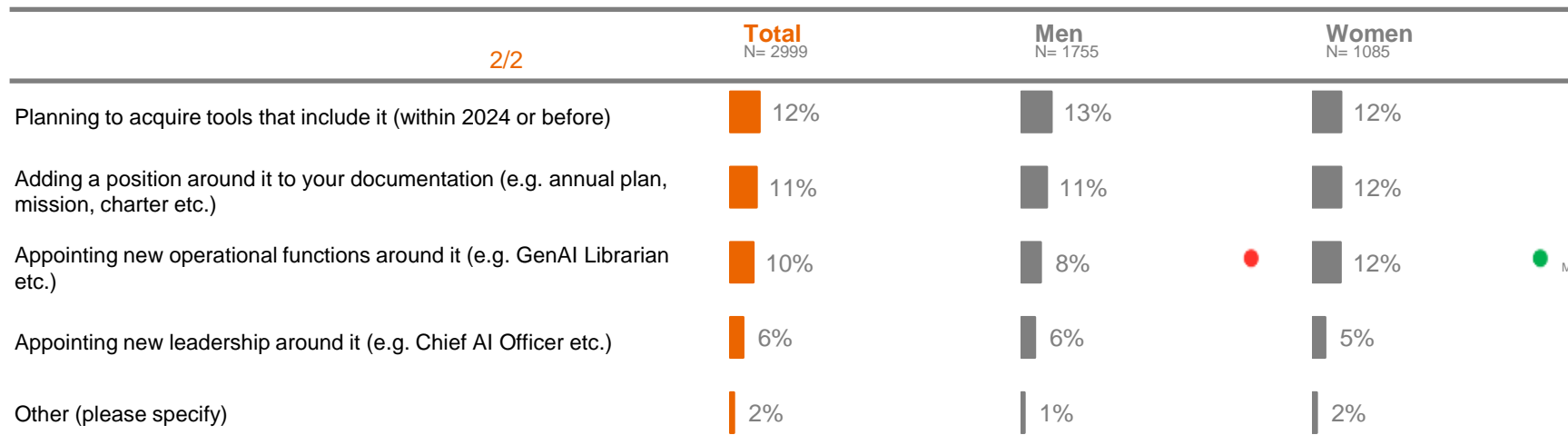
Role/ Region/ Country (indicated by first two letters e.g. AP = APAC)

Base: n= 2999

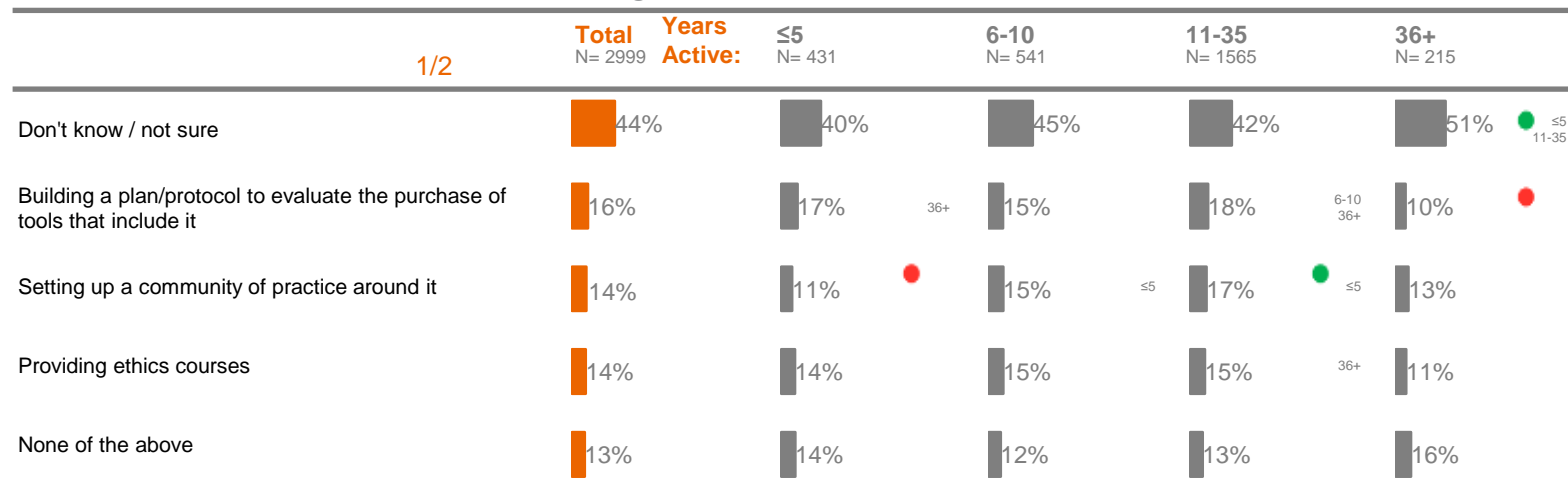
# Many are not aware of institutional plans to prepare for AI this is generally consistent across men and women



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



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



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

Select: all that apply

Base: n= 2999

Total

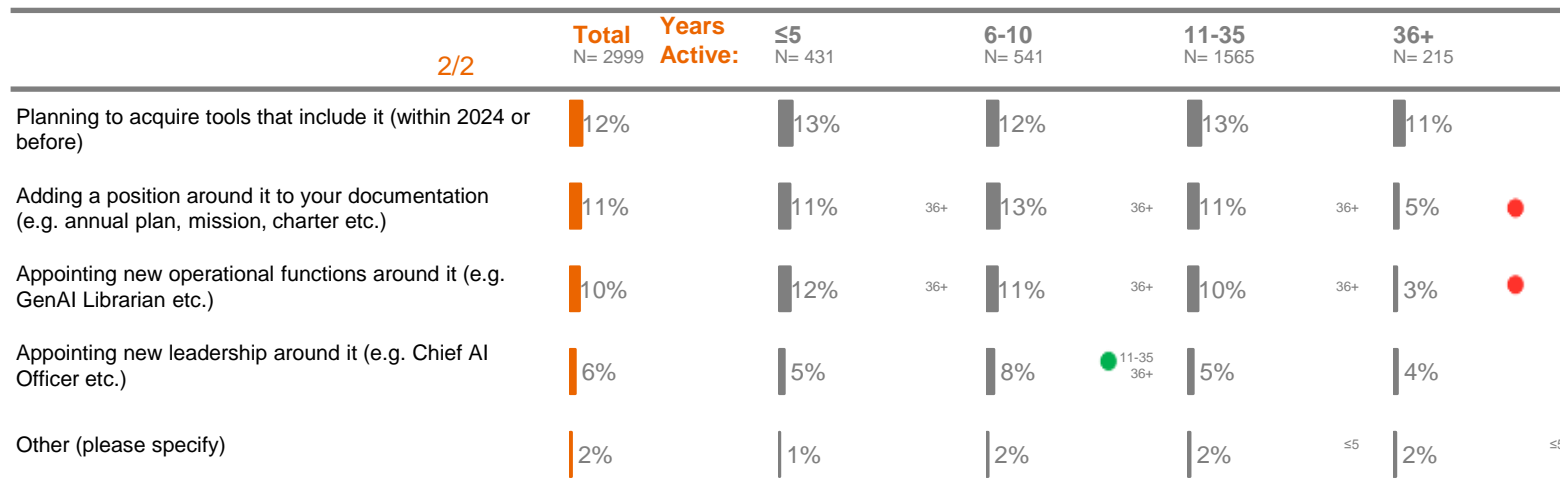


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Significantly higher than...

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



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



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

Total

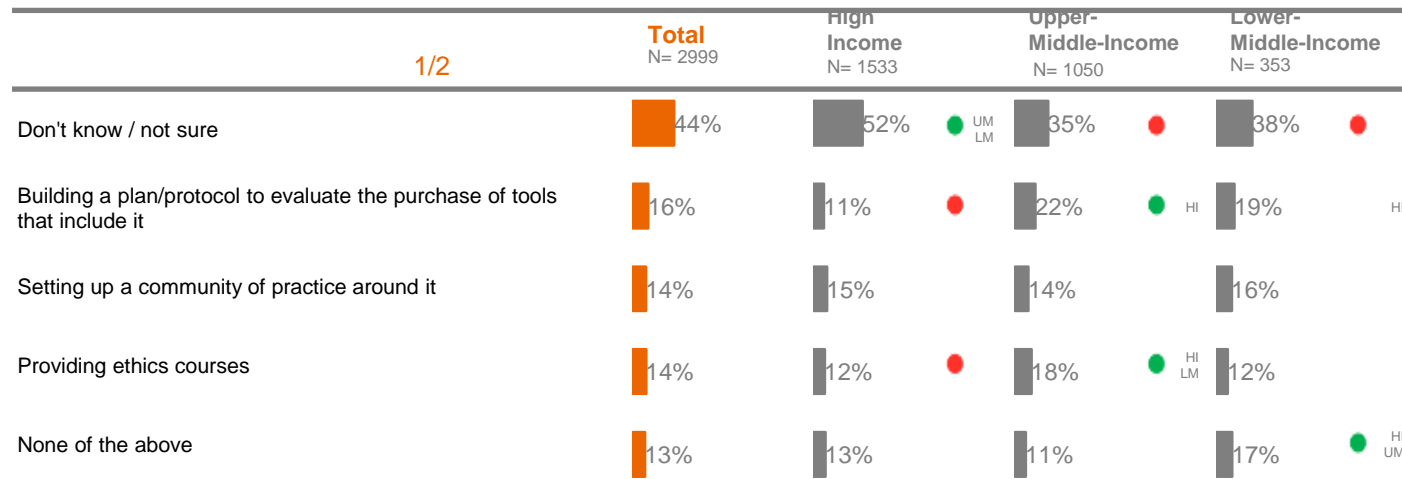


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Significantly higher than...

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

Select: all that apply  
Base: n= 2999

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



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

Total



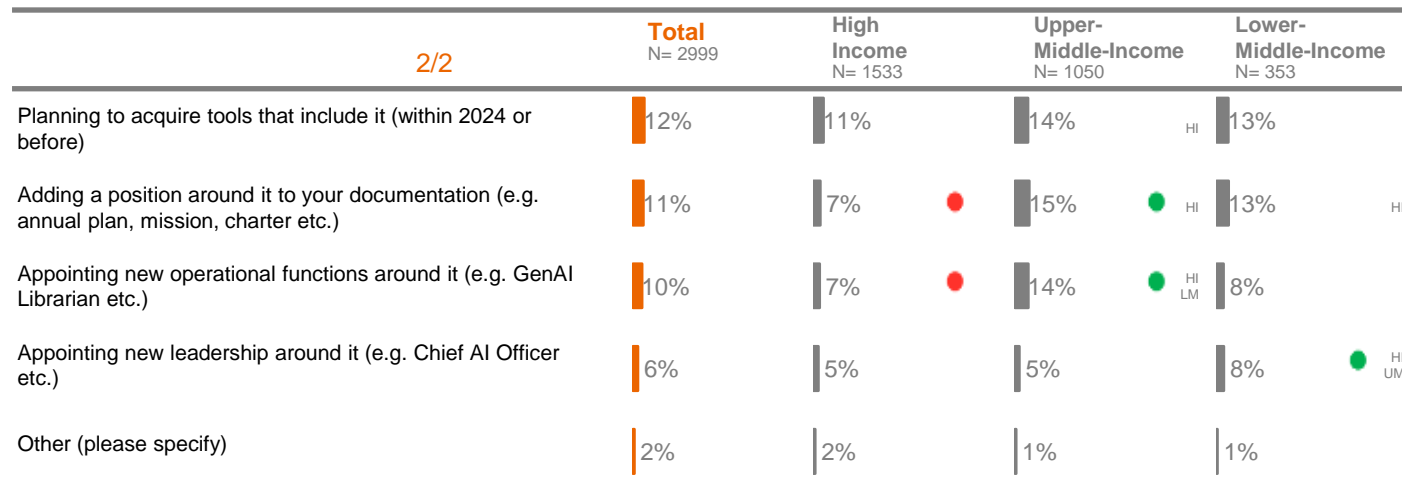
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● ● Global

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

Base: n= 2999

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



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

Total



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

● ● Global

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

Base: n= 2999

### 3. Perceptions of AI

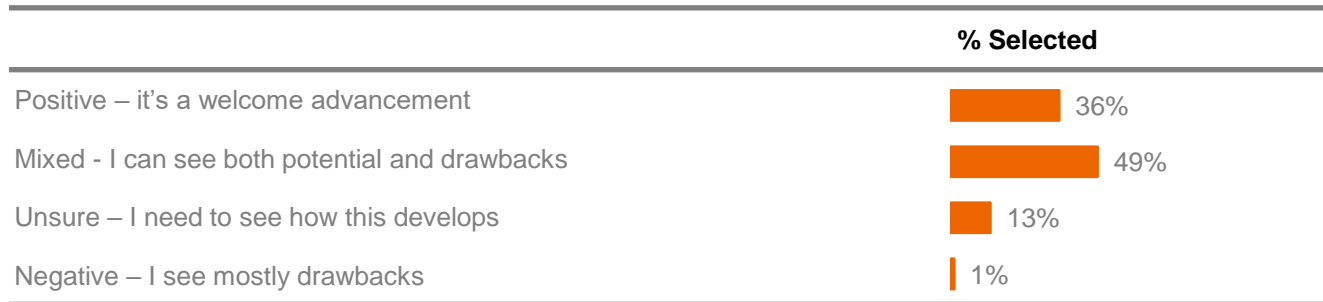
# Theme 3

## Perceptions of AI

---

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

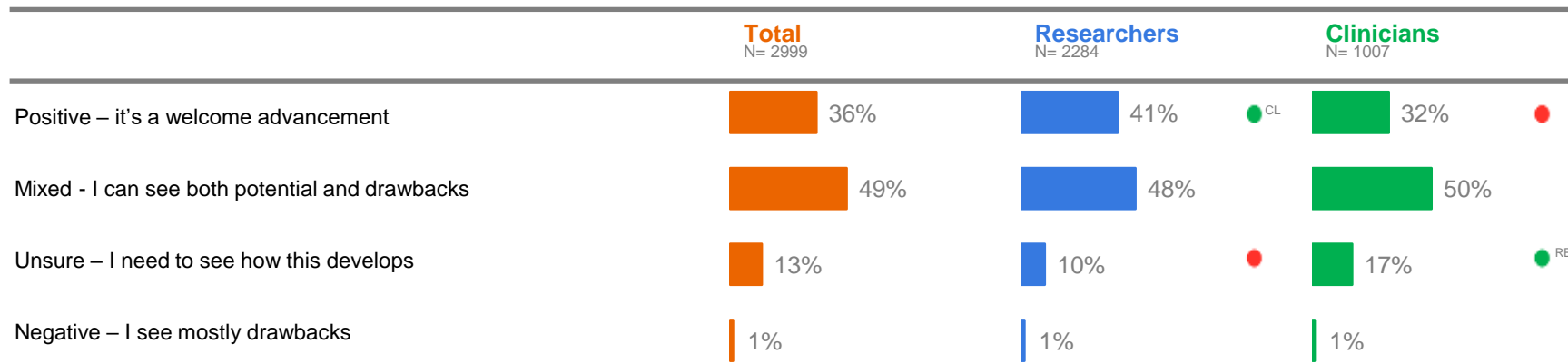
# A third are positive about the impact of AI on their area of work, nearly half have mixed feelings and very few are negative



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

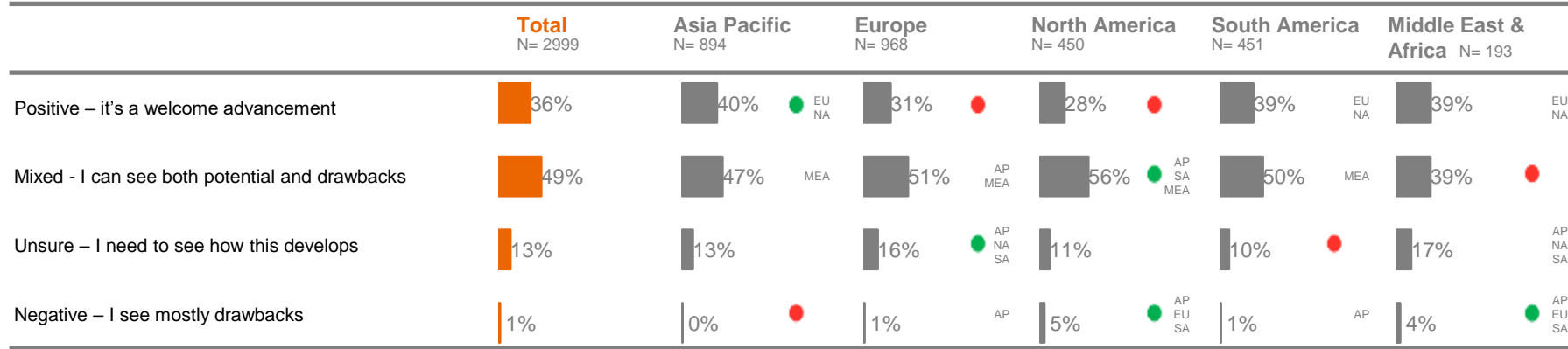
Base: n= 2999

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



Questions: What are your overall feelings about the impact of AI on your area of work?  
 Base: n= 2999

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



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

Total



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

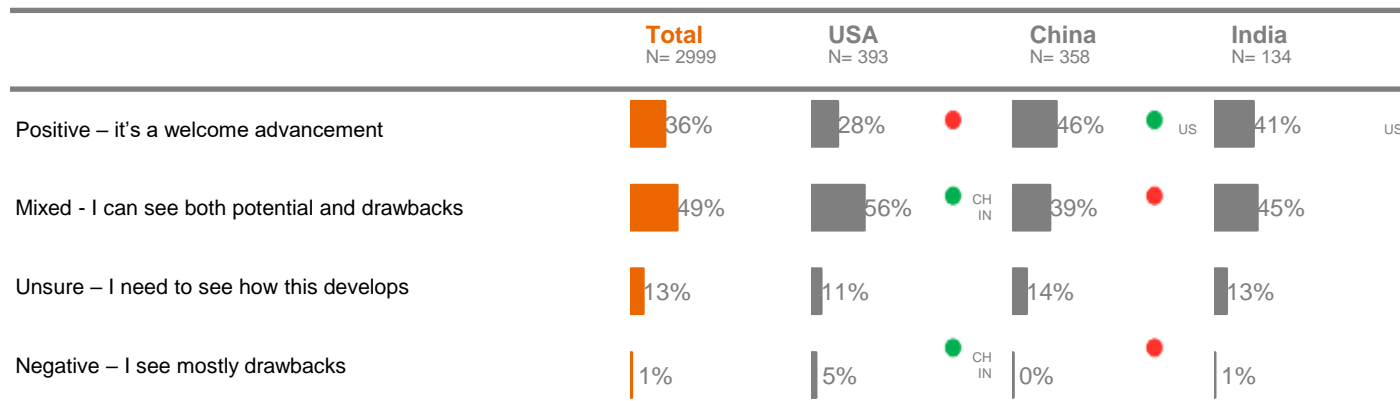
  Global

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

Base: n= 2999



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



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

Total

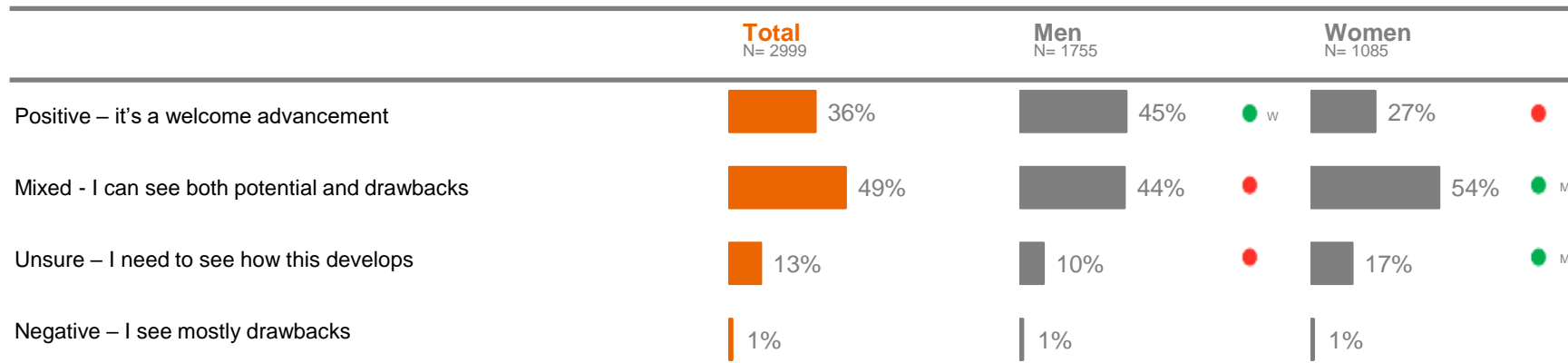


Significantly higher/ lower than...  
Significantly higher than...

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

Base: n= 2999

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



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

Total



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

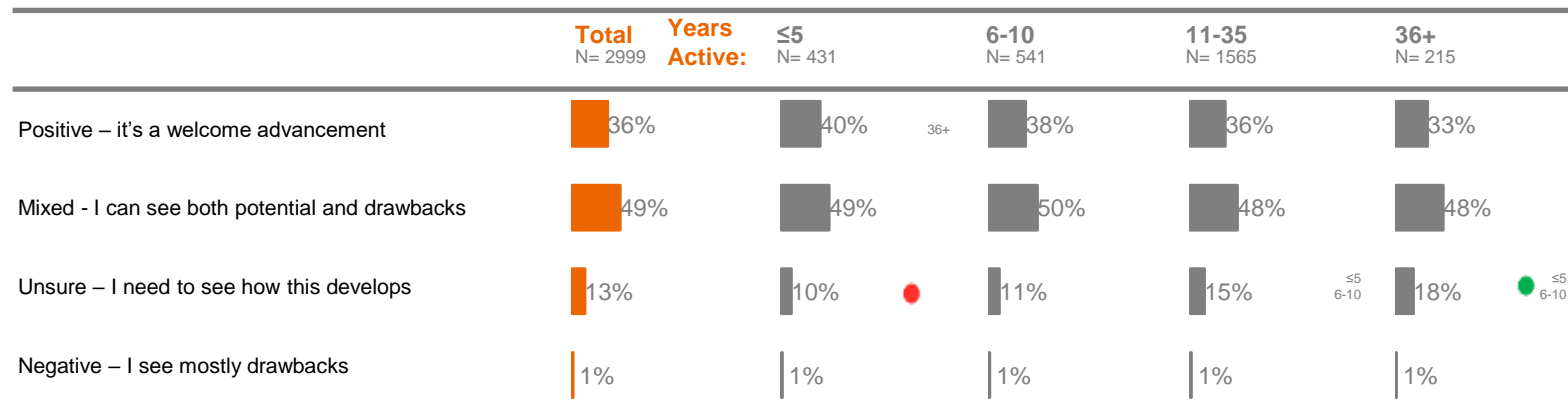


Global

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

Base: n= 2999

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



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

Total



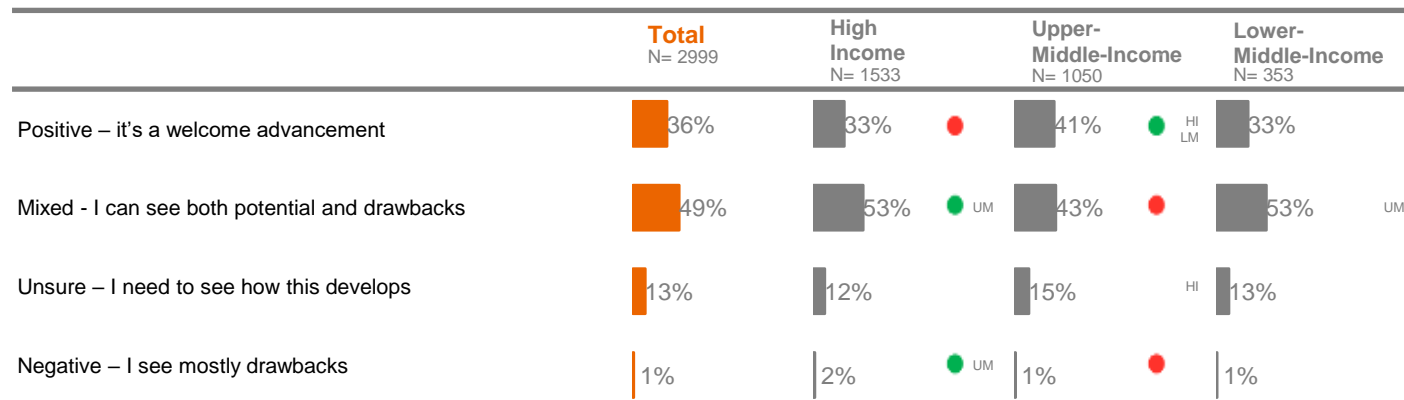
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Significantly higher than...



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

Base: n= 2999

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



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

Total



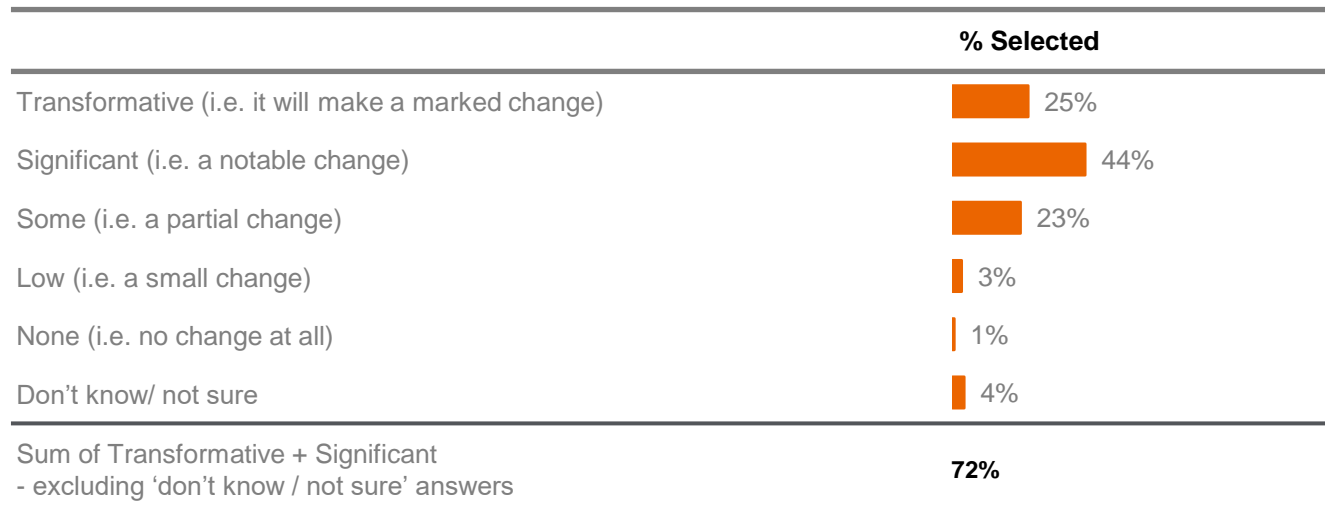
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Significantly higher than...

● ● Global

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

Base: n= 2999

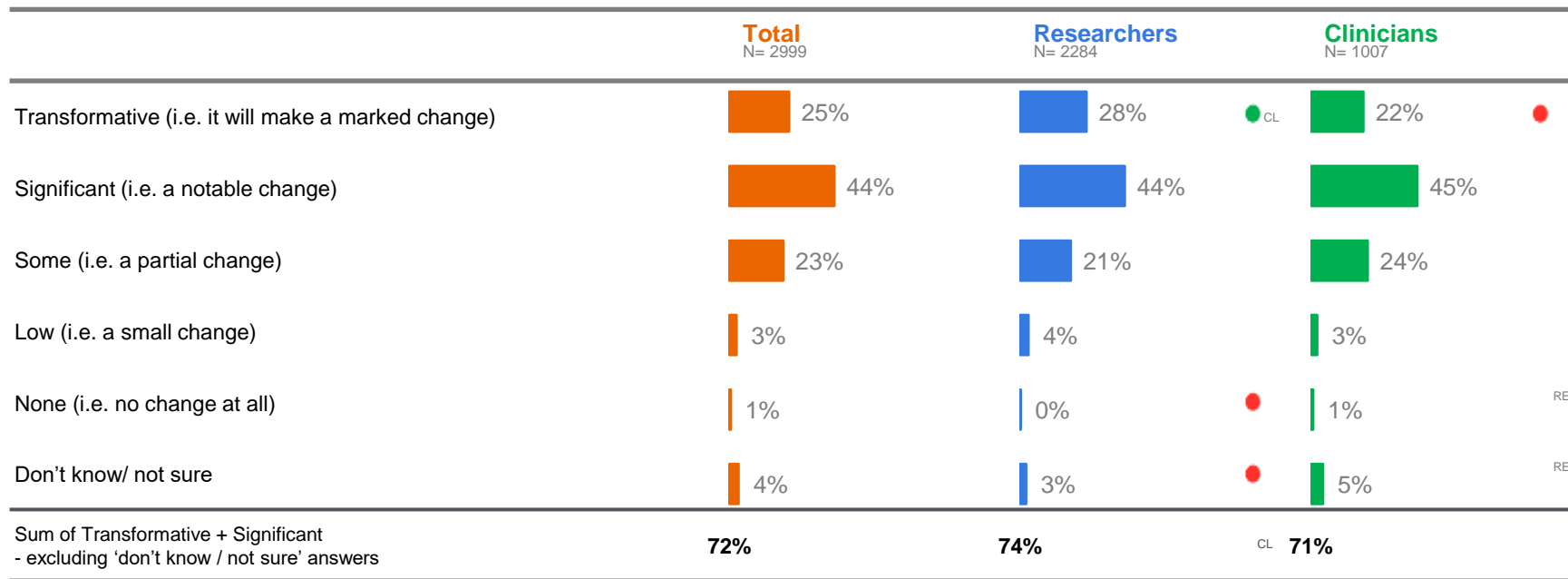
# Nearly three quarters think the impact of AI on their area of work will be transformative or significant



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

Base: n= 2999

# 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?

Total

Researchers

Clinicians



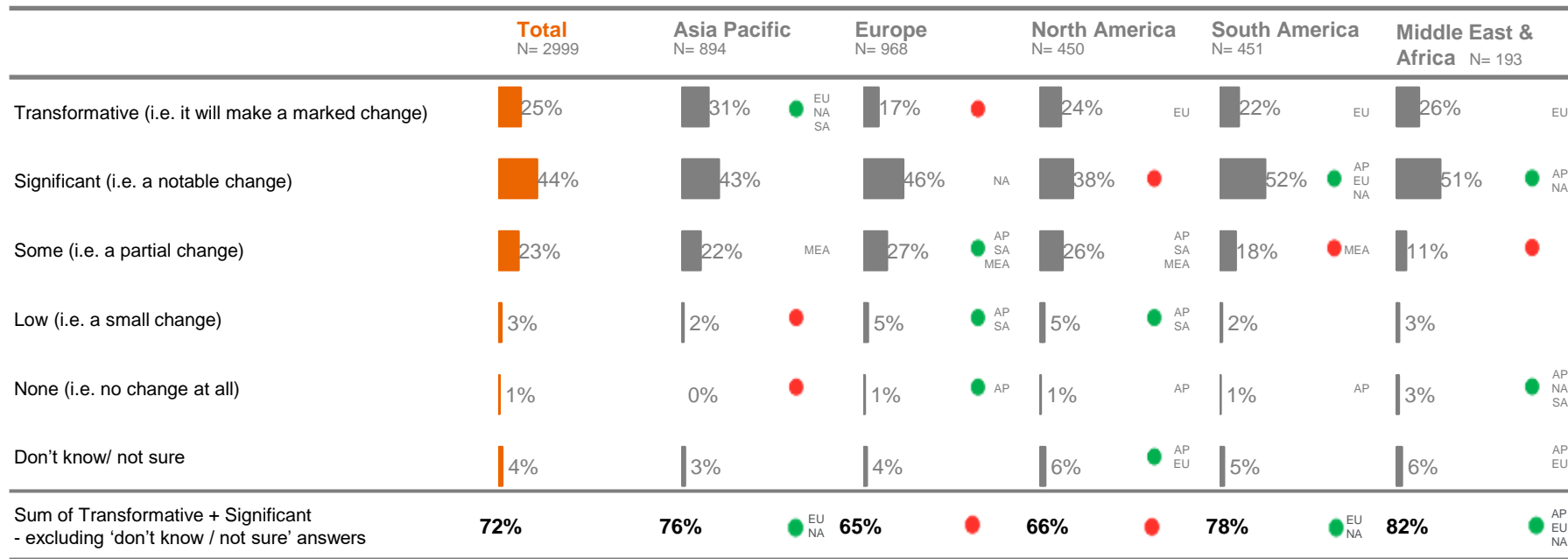
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● ● Global

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

Base: n= 2999

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



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

Total



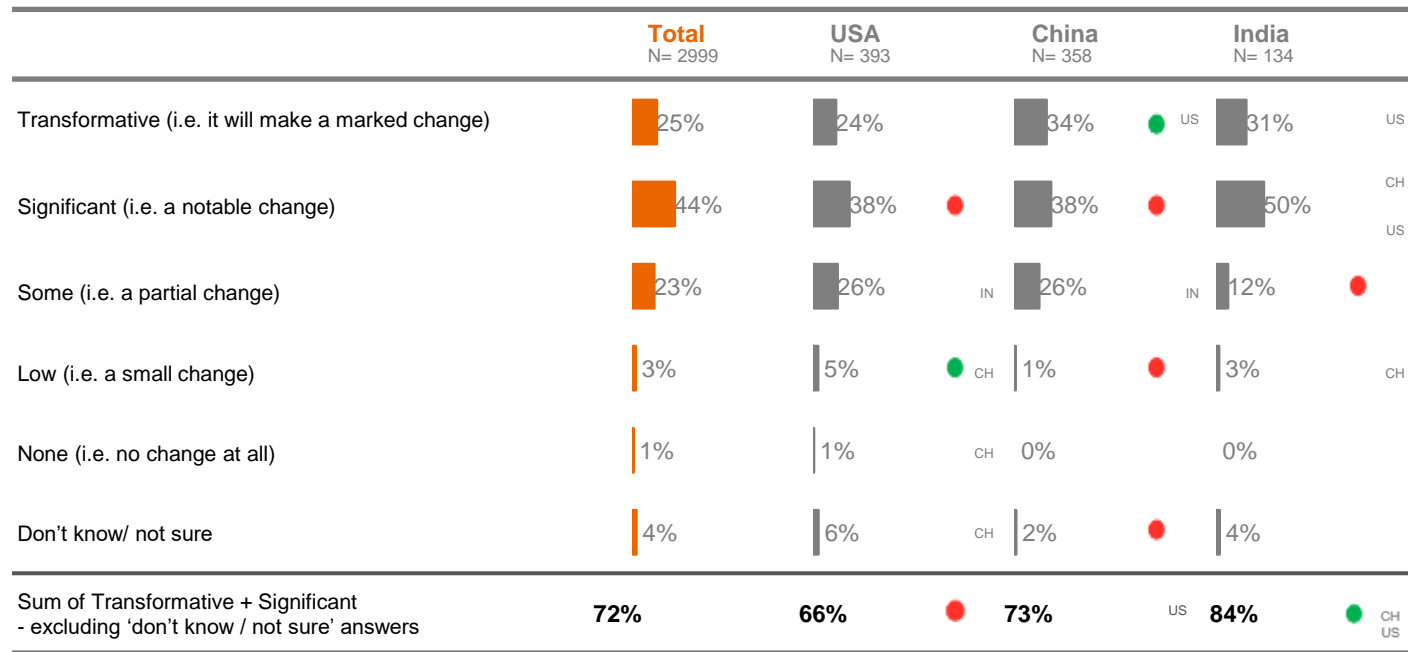
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Significantly higher than...

● ● Global

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

Base: n= 2999

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



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

Total



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

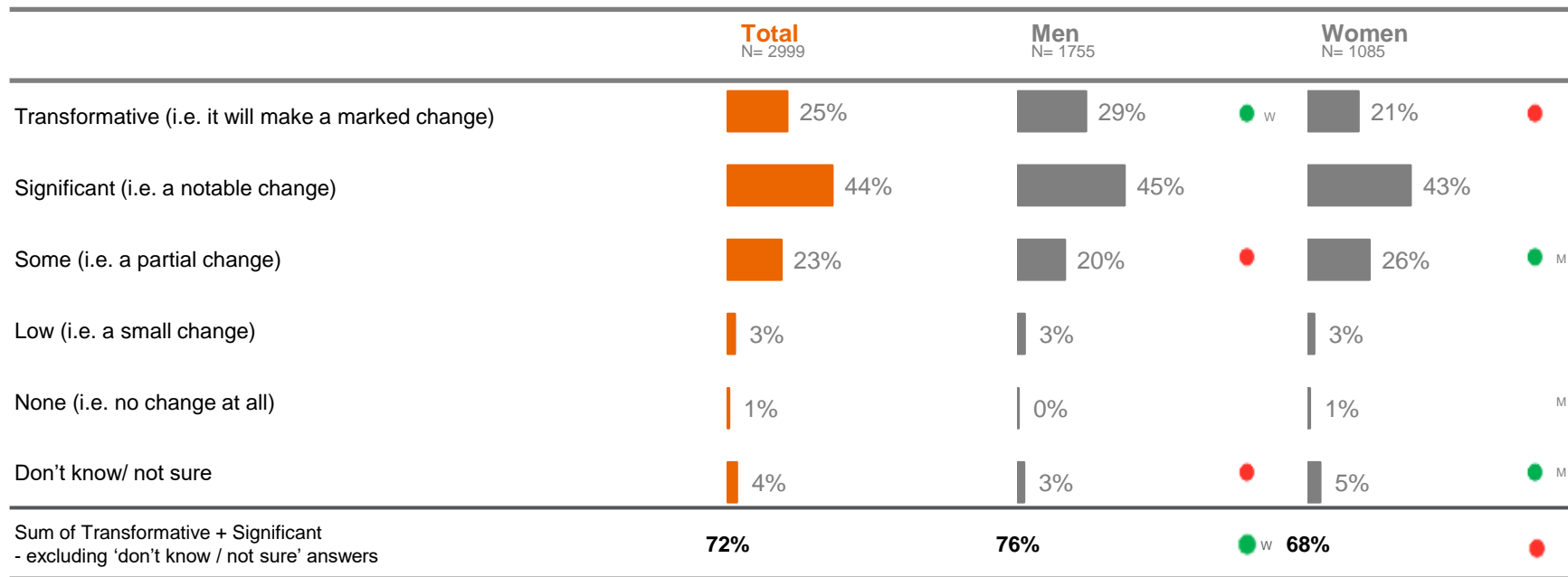
● ● Global

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

Base: n= 2999

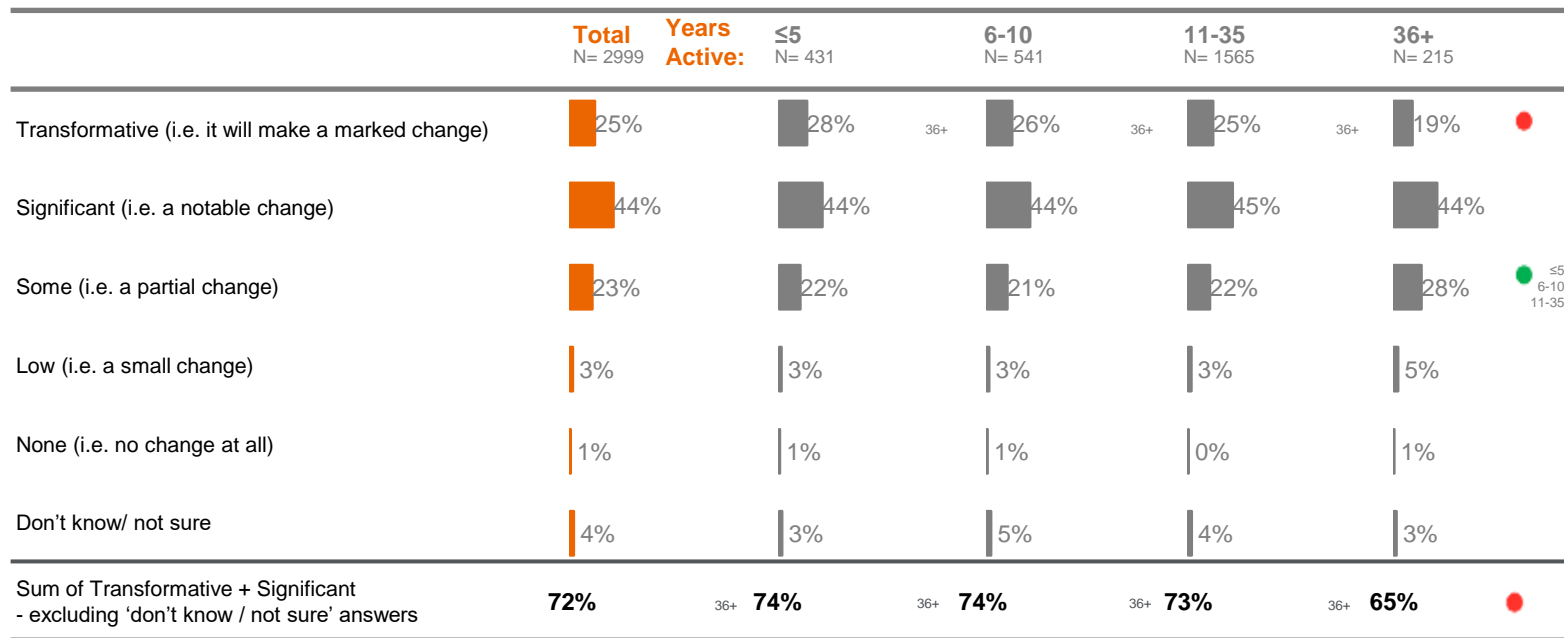


# Men are more likely to think AI will be transformative than women



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

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



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

Total

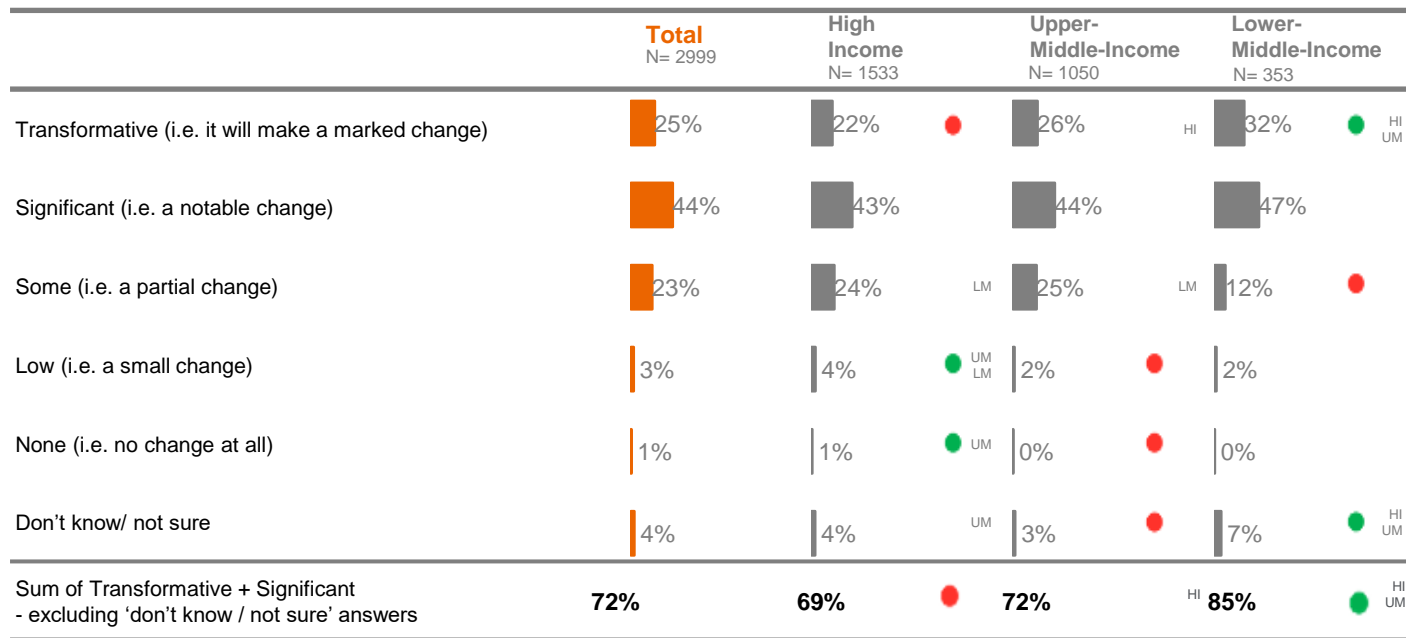


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Significantly higher than...

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

Base: n= 2999

# 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



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

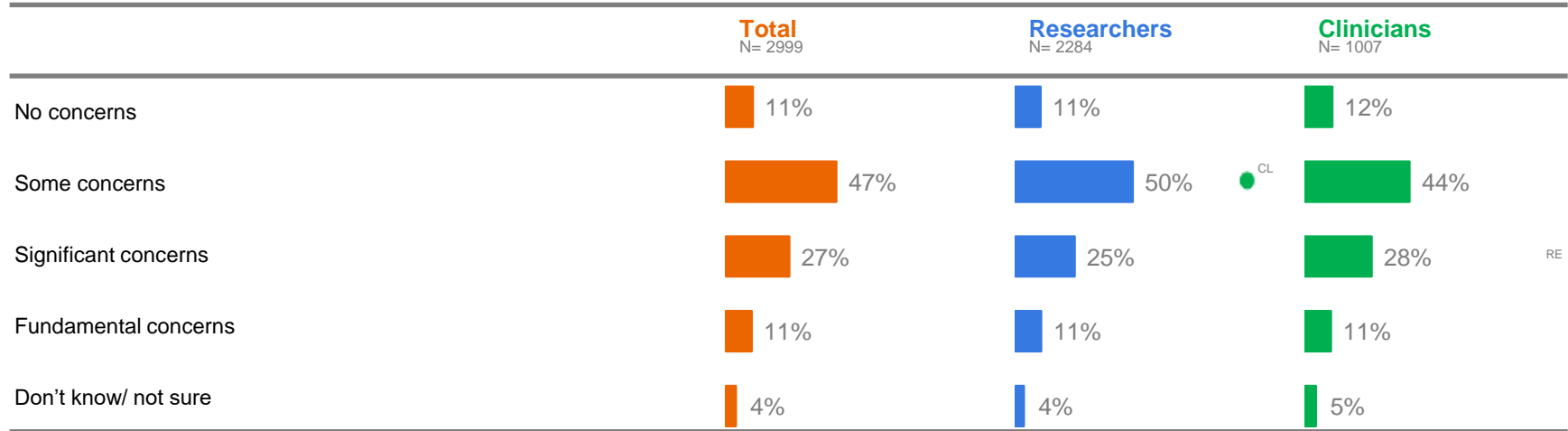
# Most have at least some concerns about the ethical implications of AI in their area of work, only 1 in 10 have no concerns



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

Base: n= 2999

# 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



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

Base: n=2999

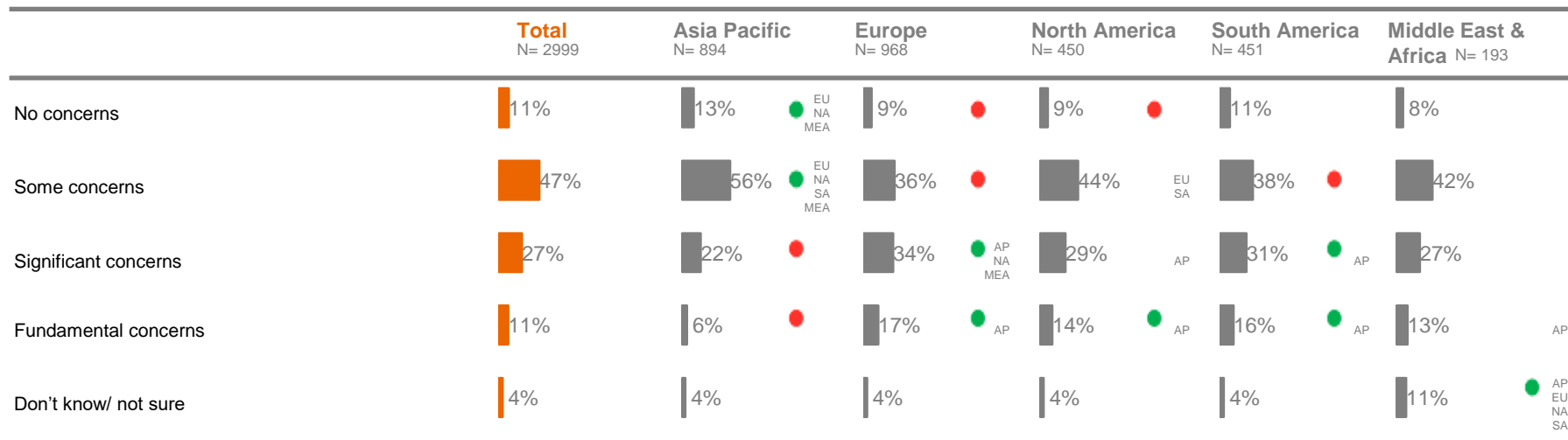
Total

Researchers

Clinicians



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



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

Total

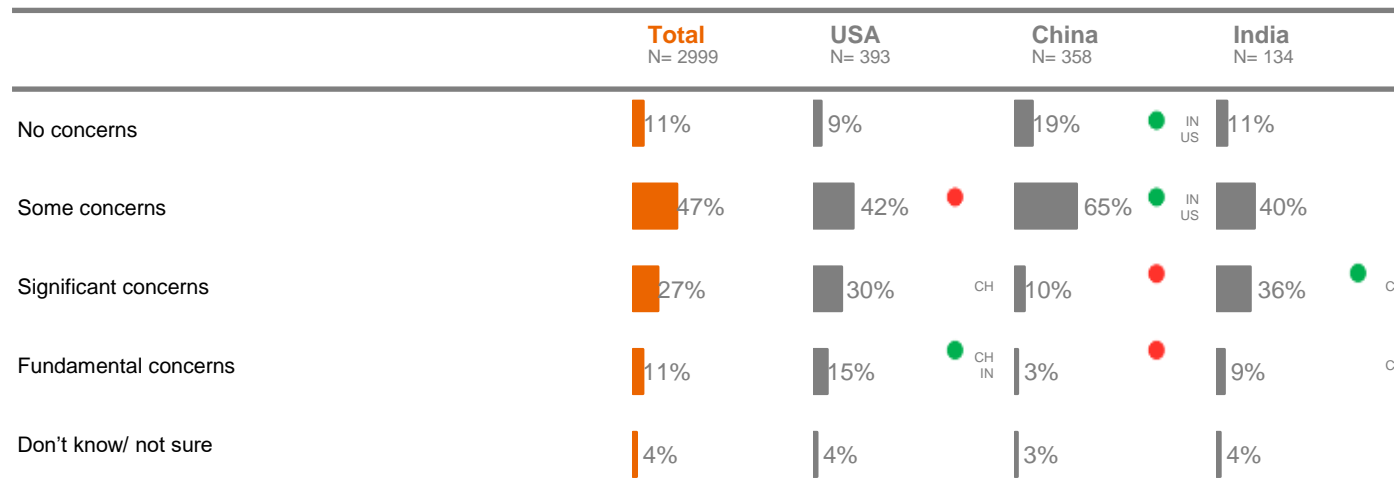


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Significantly higher than...

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

Base: n= 2999

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



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

Total



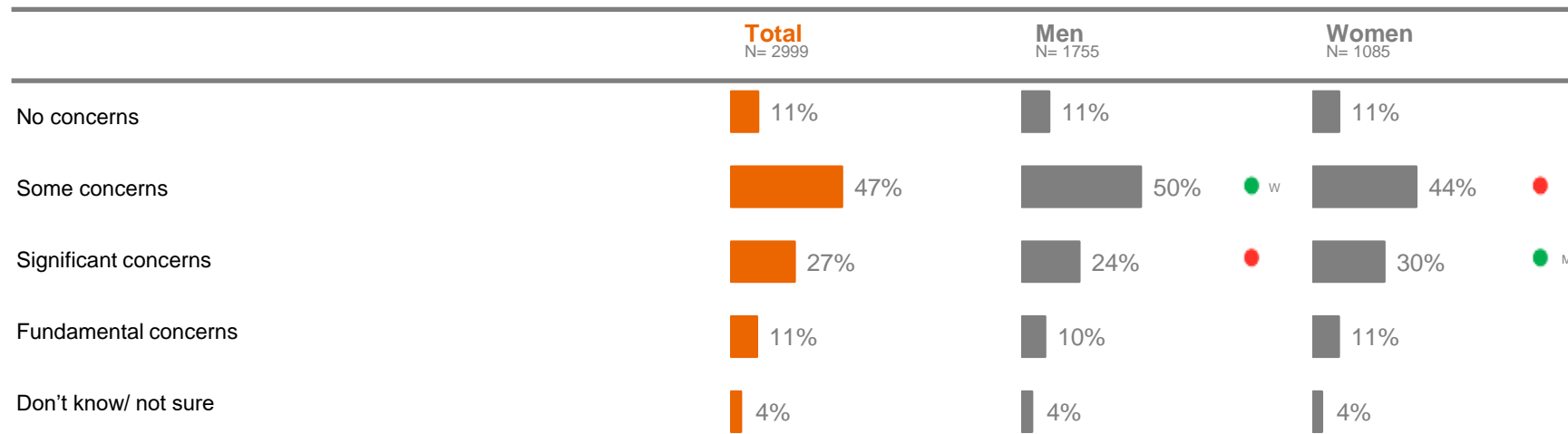
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● ● Global

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

Base: n= 2999

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



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

Total



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

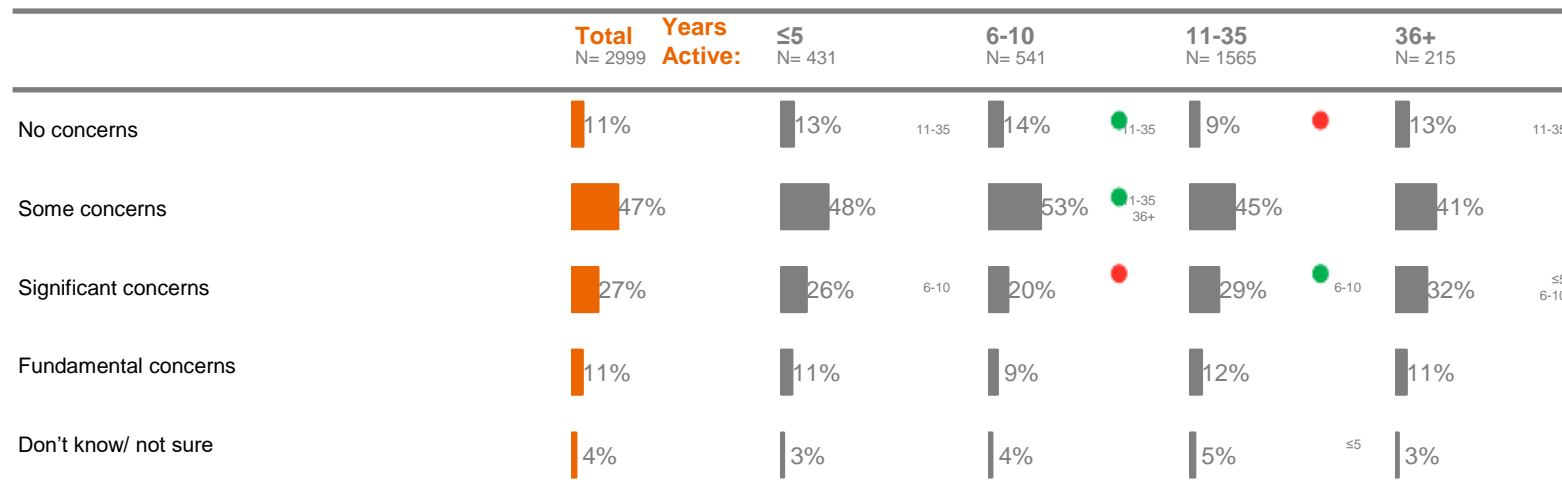
● ● Global

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

Base: n= 2999



# 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



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

Total



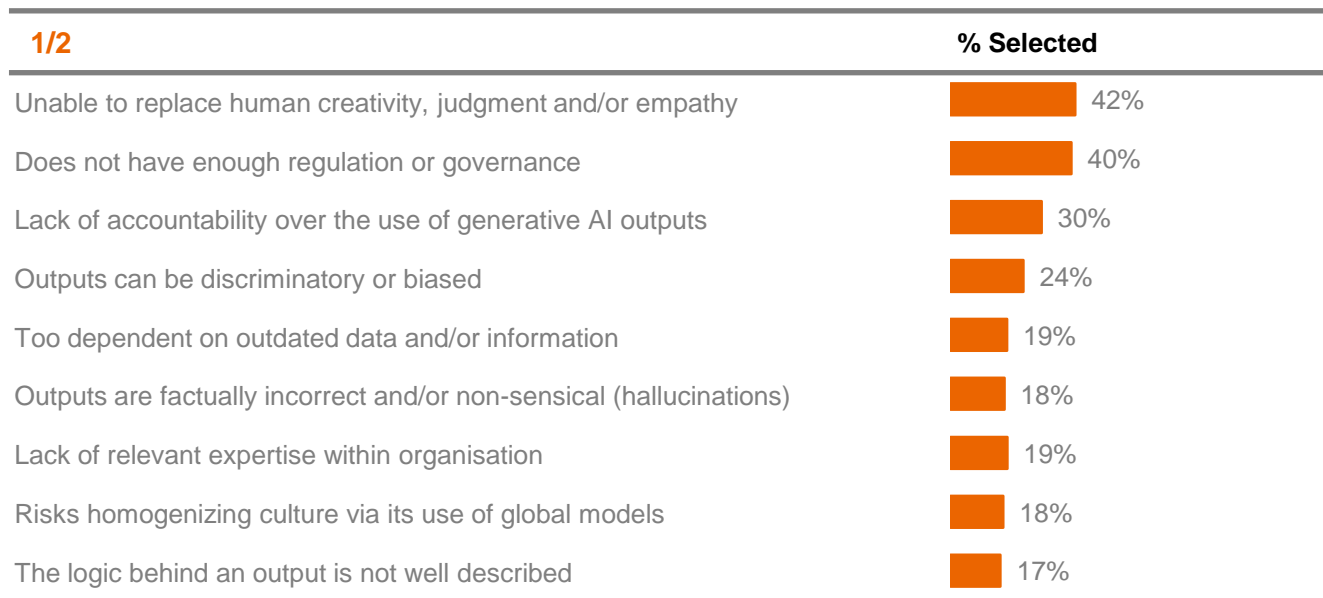
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● ● Global  
Role/ Region/ Country (indicated by first two letters e.g. AP = APAC)

Base: n= 2999



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

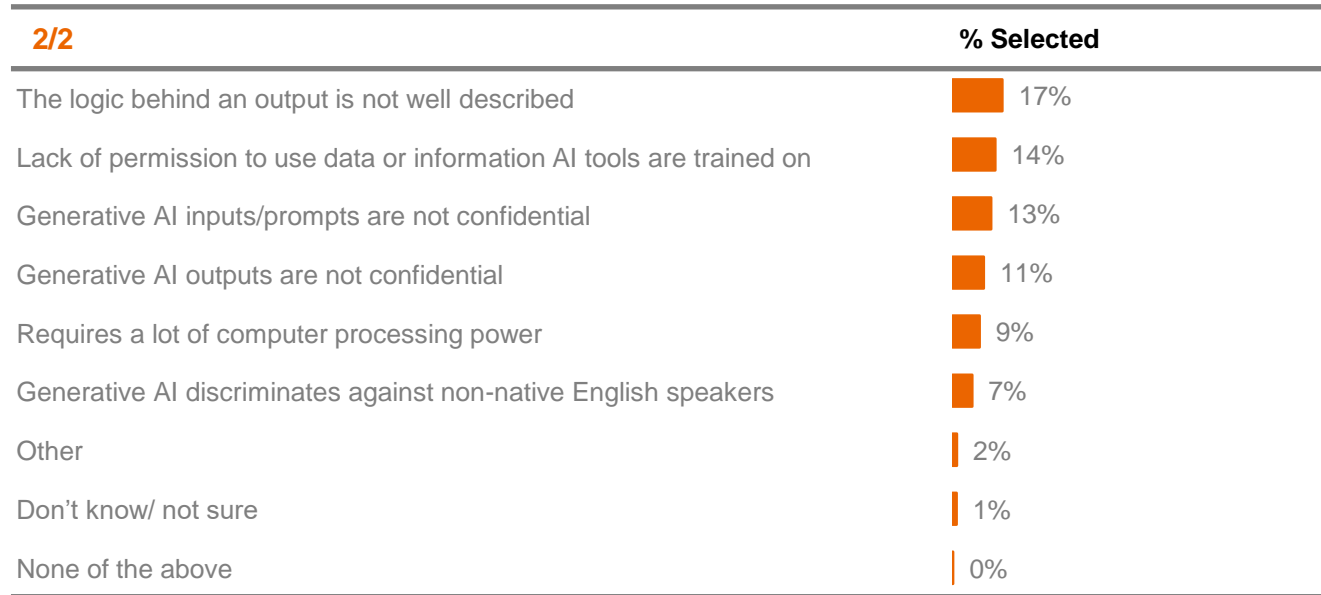


Questions: You mentioned that you had concerns, what do you think are the top 3 disadvantages of AI?

Select: up to three

Base: n= 2561

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

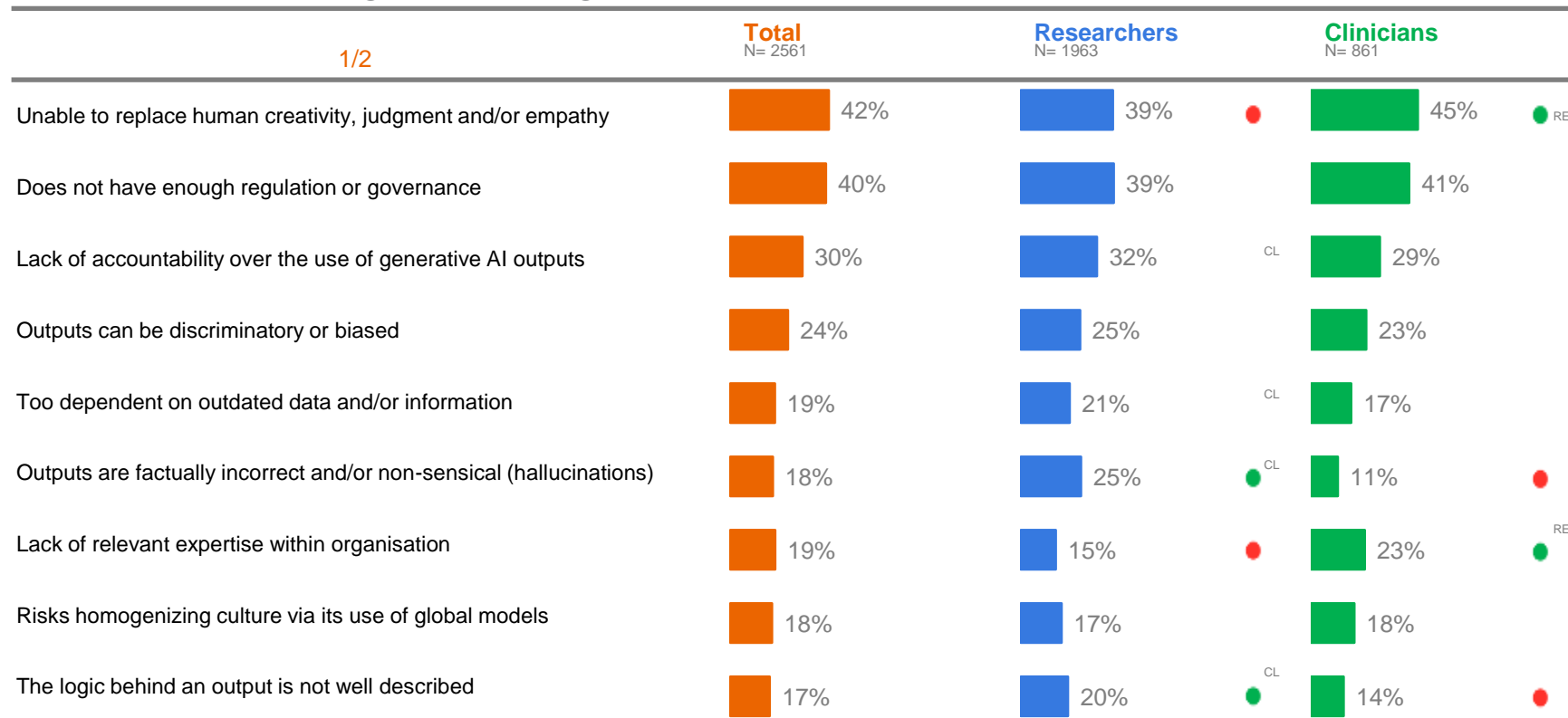


Questions: You mentioned that you had concerns, what do you think are the top 3 disadvantages of AI?

Select: up to three

Base: n= 2561

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



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

Select: up to three

Base: n= 2561

Total

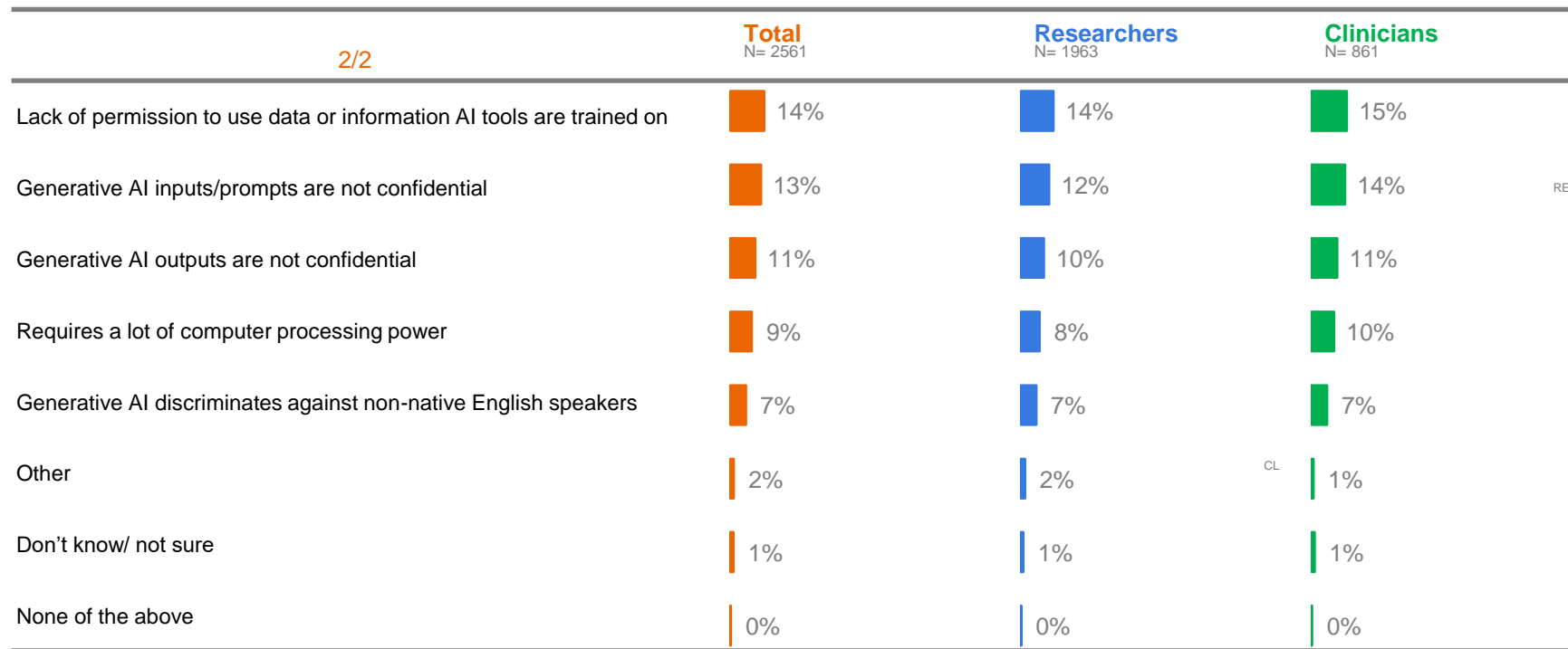
Researchers

Clinicians



Back to home

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



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

Select: up to three

Base: n= 2561

Total

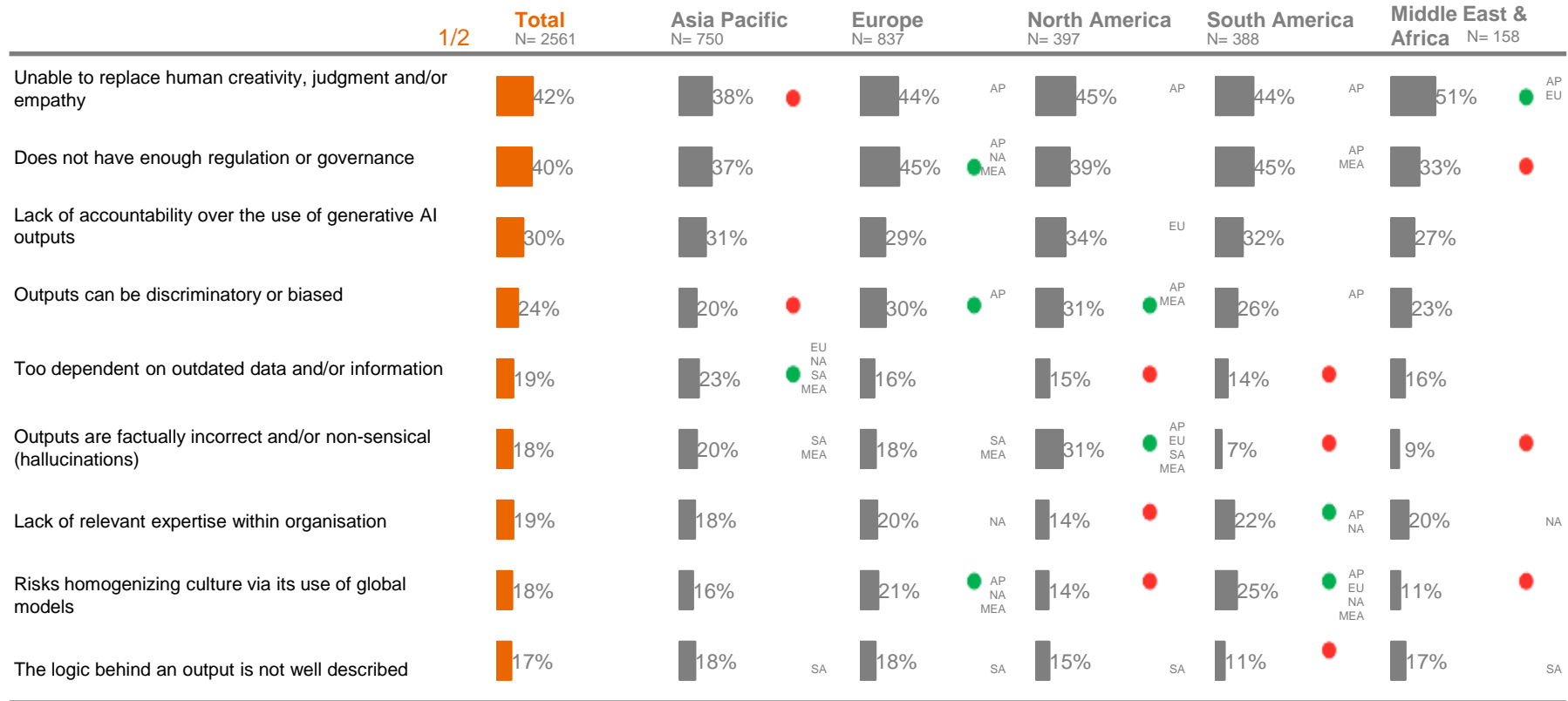
Researchers

Clinicians



Back to home

# 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)



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

Total



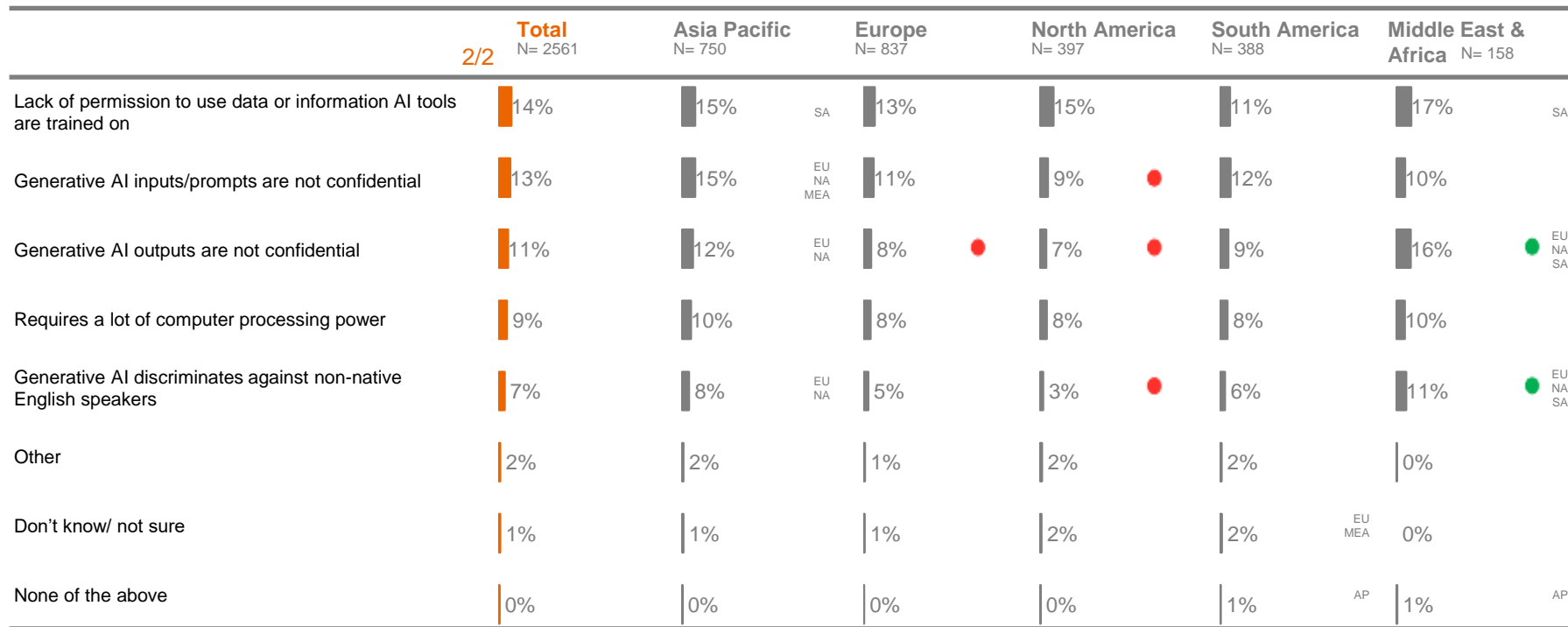
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Significantly higher than...

● ● Global

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

Base: n= 2561

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)



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

Total



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

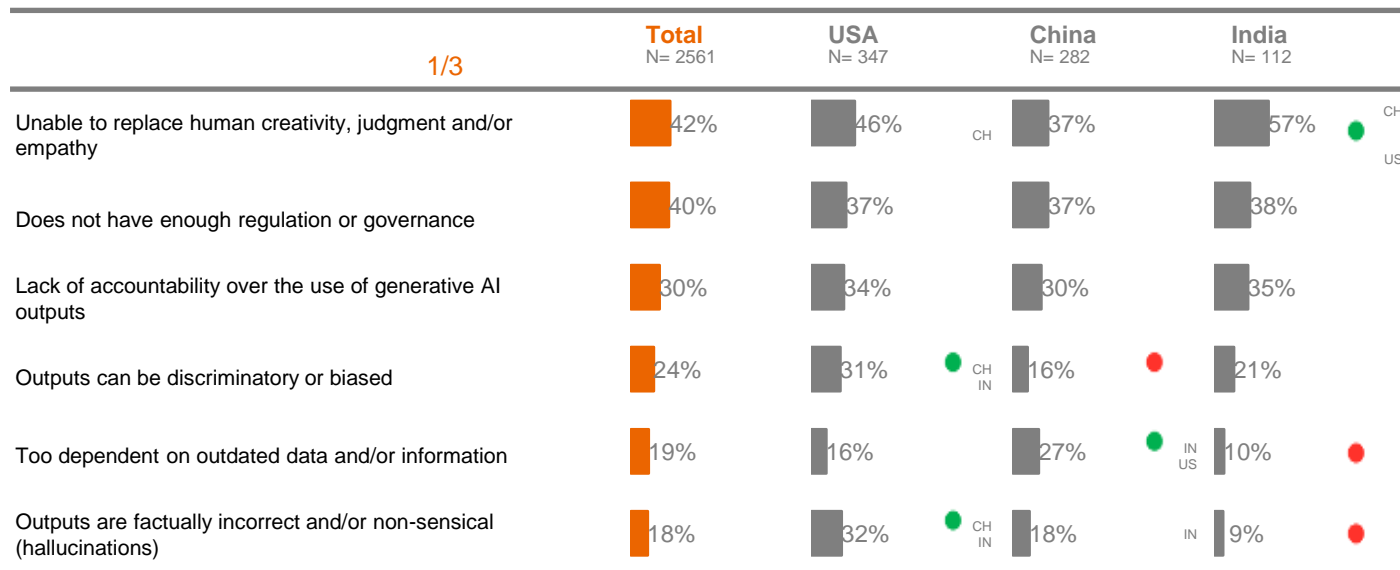
Global

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

Base: n= 2561



# 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)



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

Total

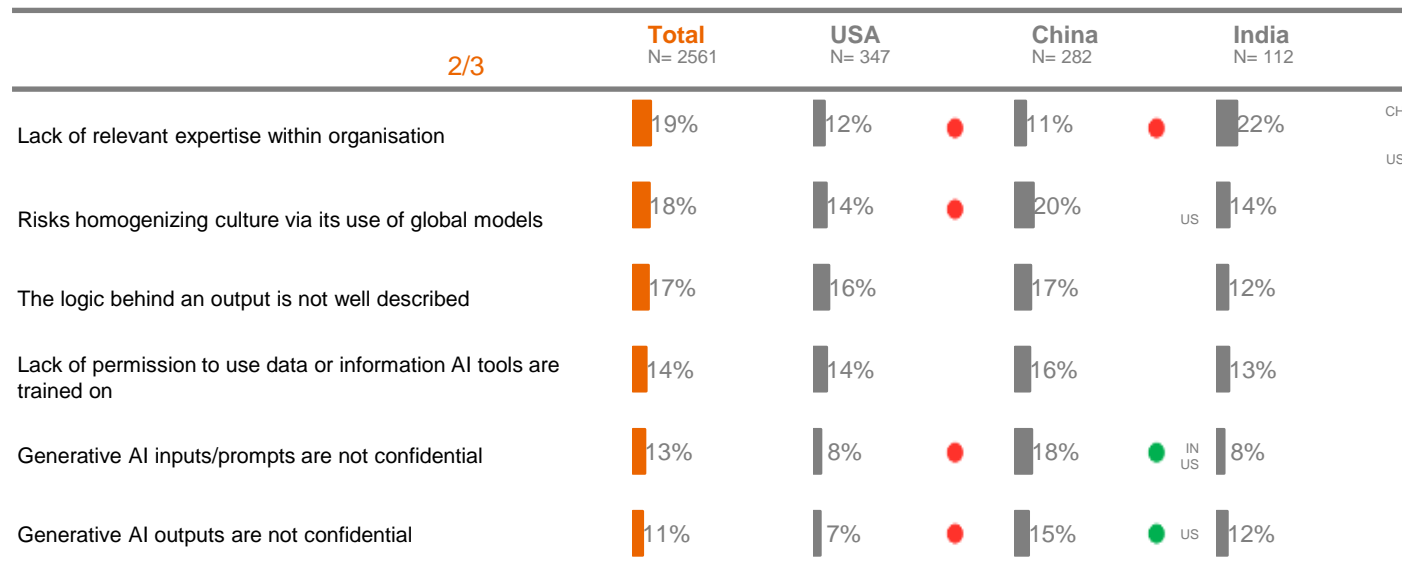


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Significantly higher than...

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

Base: n= 2561

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



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

Total

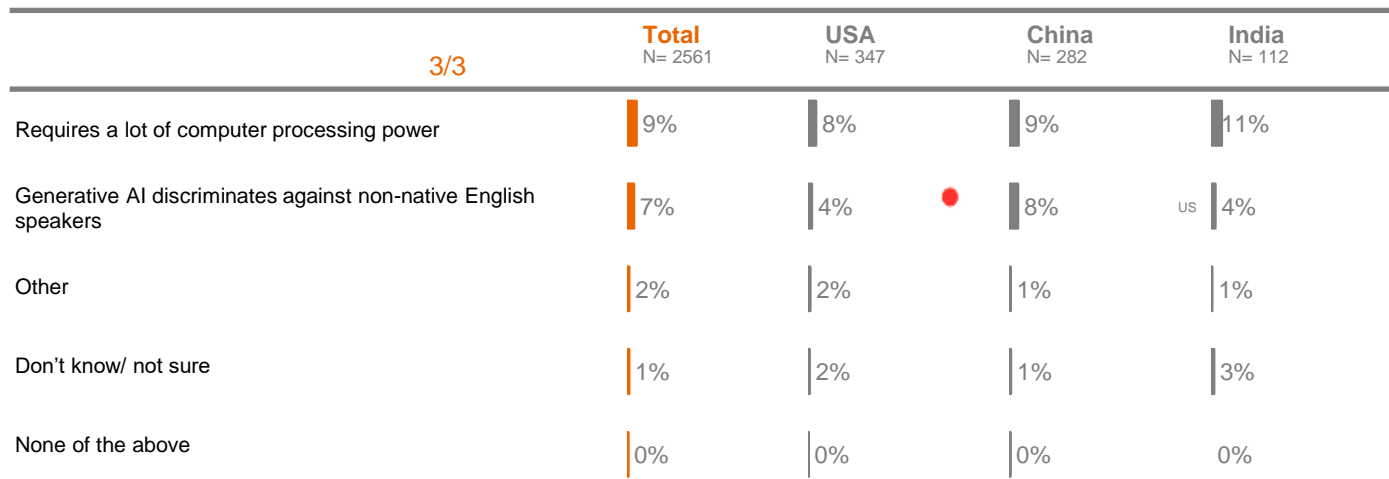


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Significantly higher than...

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

Base: n= 2561

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



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

Total



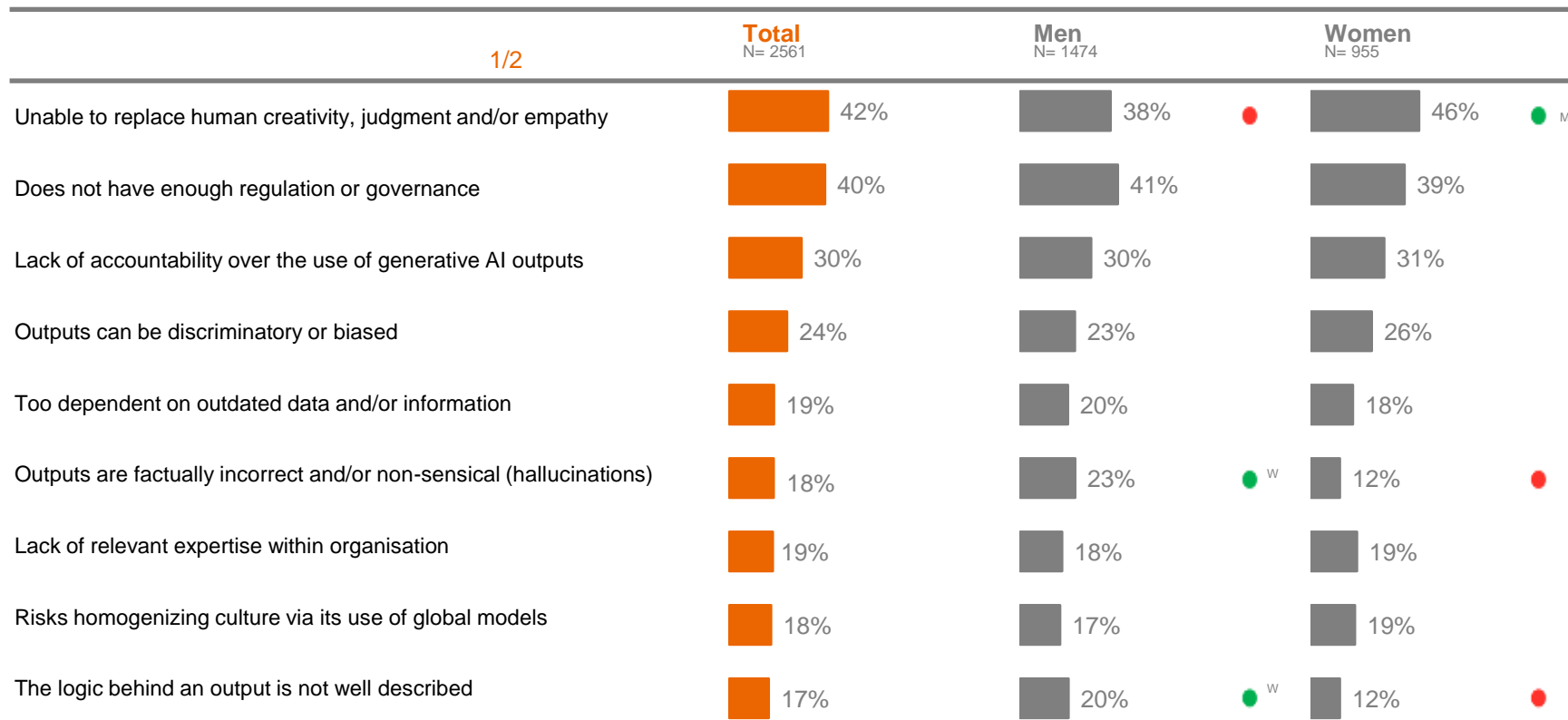
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Global  
Role/ Region/ Country (indicated by first two letters e.g. AP = APAC)

Base: n= 2561

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



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

Total



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

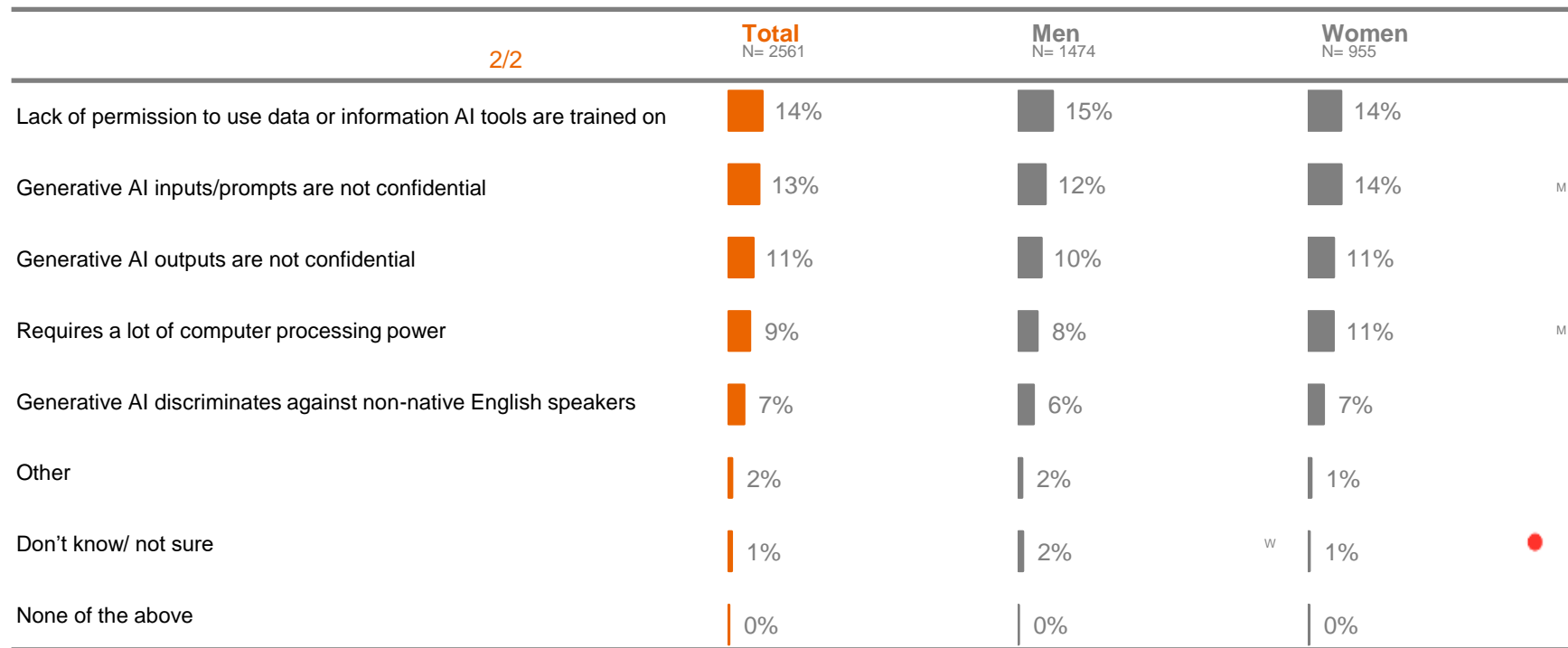
● ● Global

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

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



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

Total



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

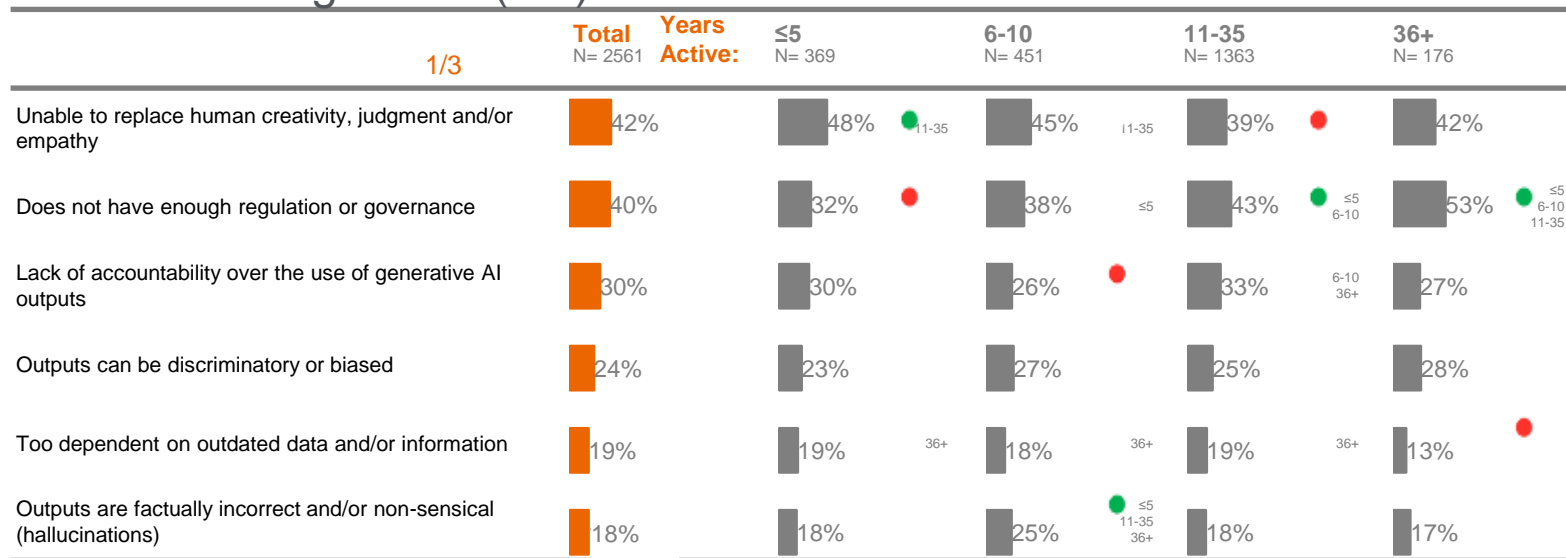
  Global

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

Select: up to three

Base: n= 2561

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?

Total



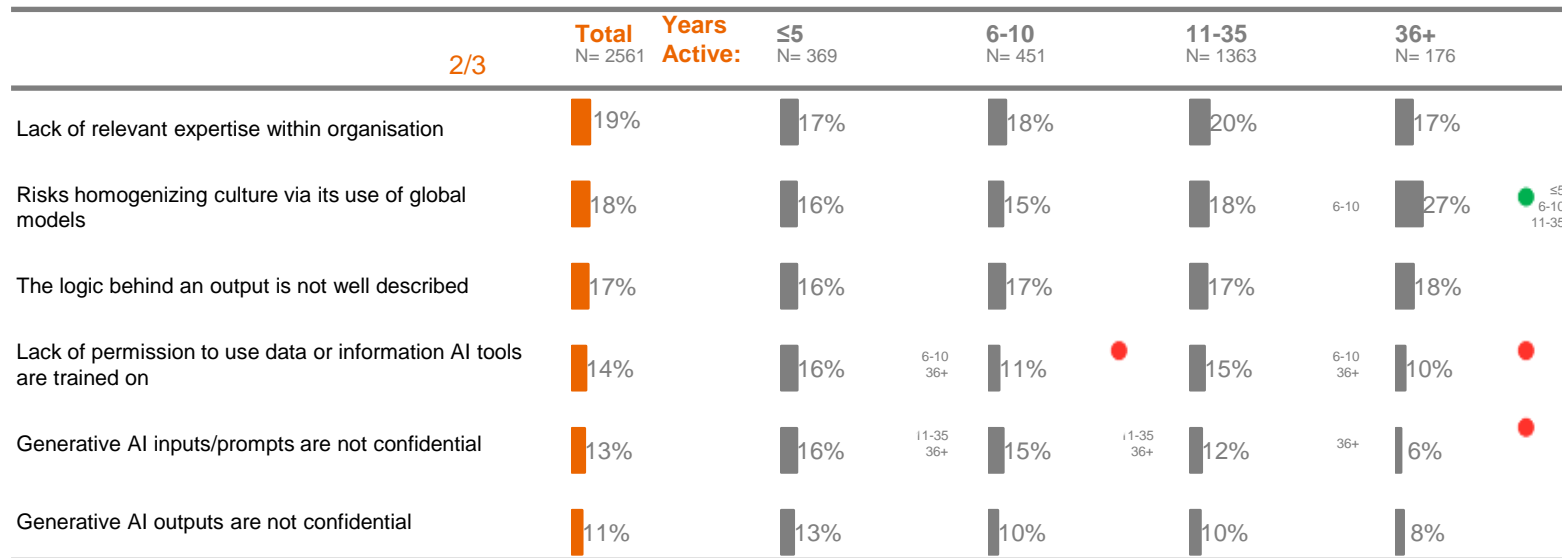
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● ● Global  
Role/ Region/ Country (indicated by first two letters e.g. AP = APAC)

Select: up to three

Base: n= 2561

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)



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

Total



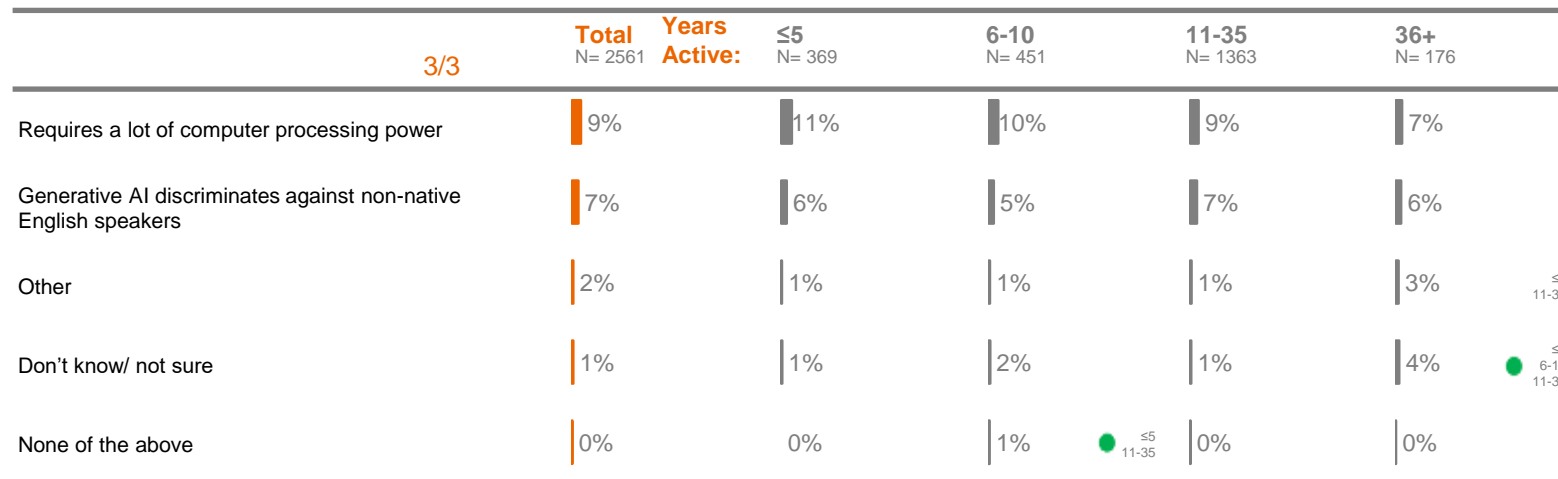
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● ● Global  
Role/ Region/ Country (indicated by first two letters e.g. AP = APAC)

Select: up to three

Base: n= 2561

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)



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

Select: up to three

Base: n= 2561

Total



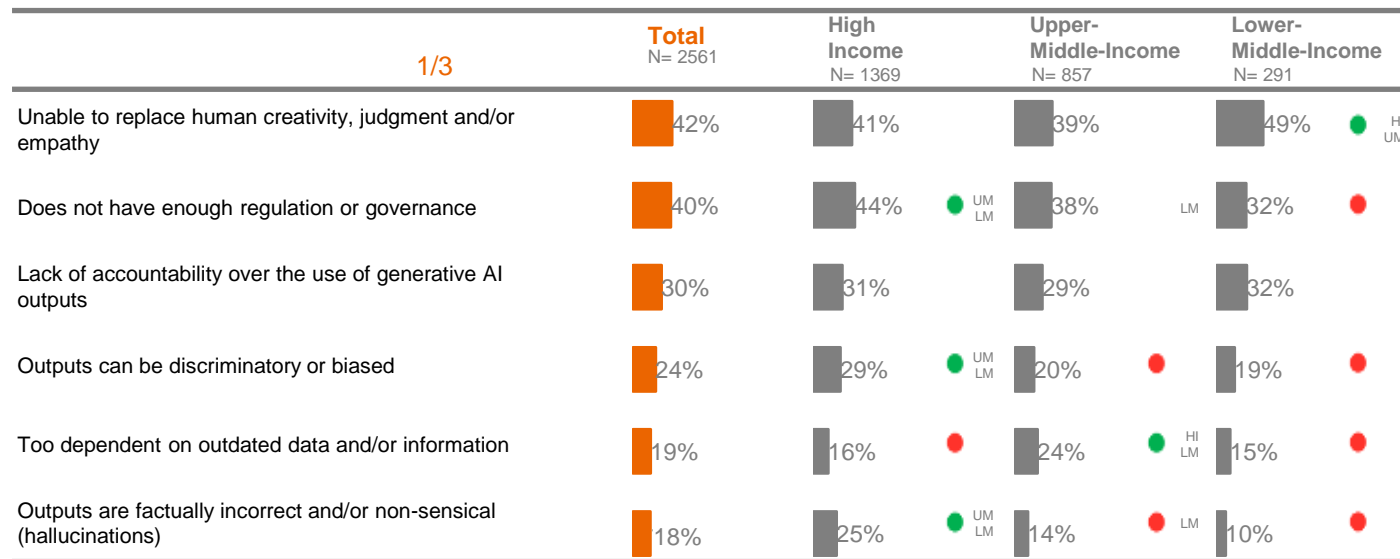
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● ● Global

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



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)



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

Total



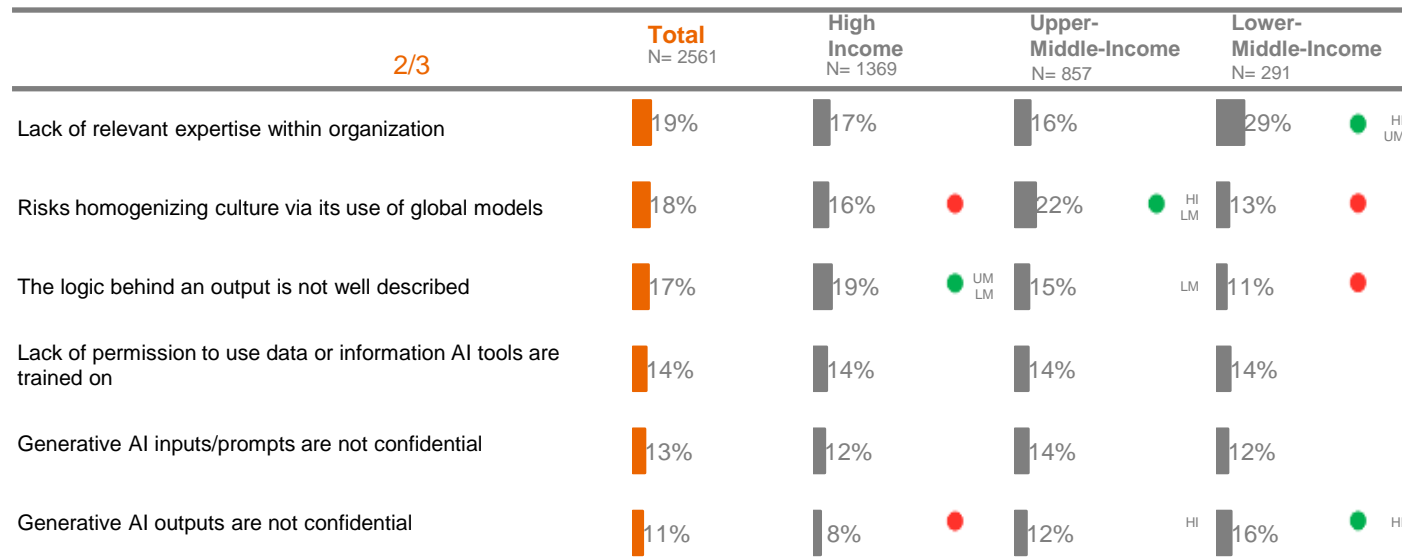
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● ● Global

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

Base: n= 2561

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)



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

Total



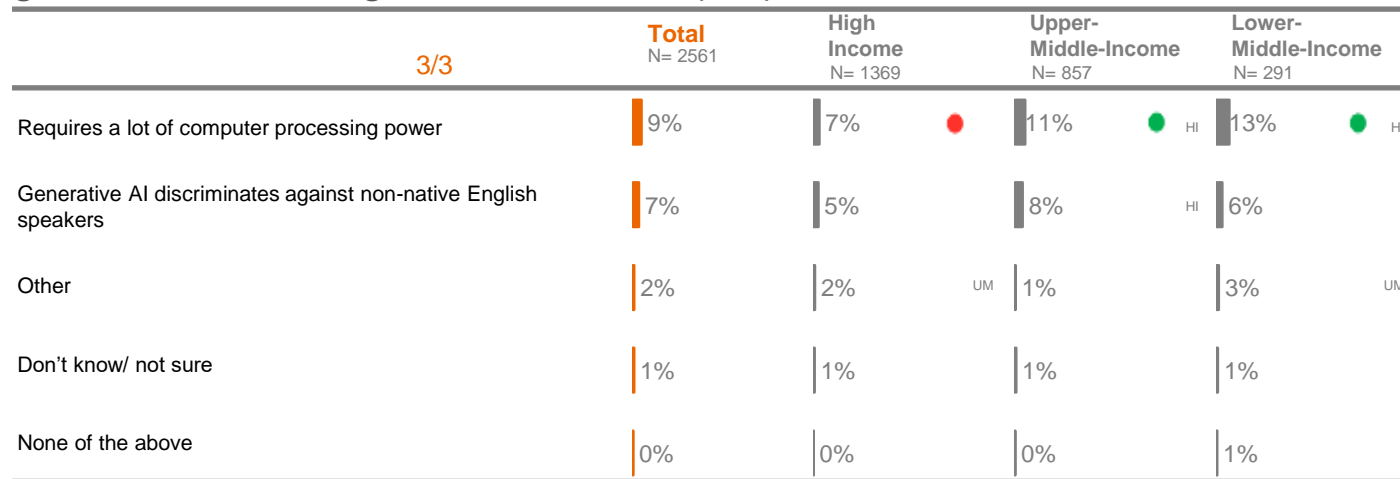
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Significantly higher than...

● ● Global

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

Base: n= 2561

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)



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

Total



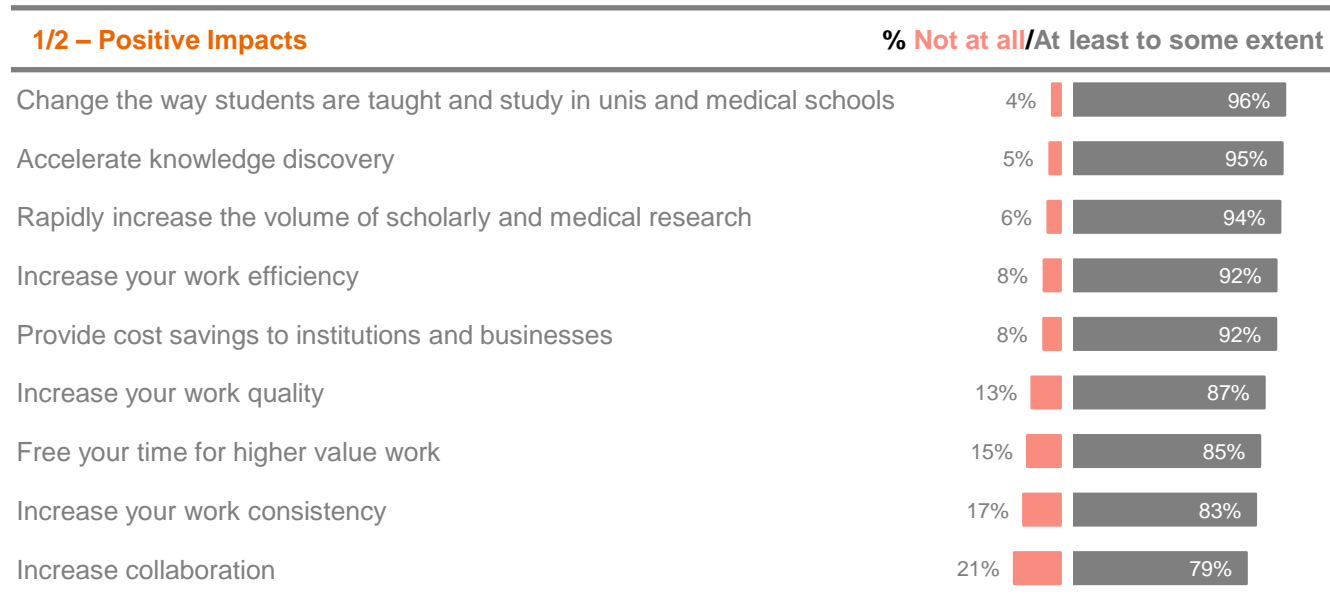
Significantly higher/ lower than...  
Significantly higher than...

● ● Global

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

Base: n= 2561

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



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...?

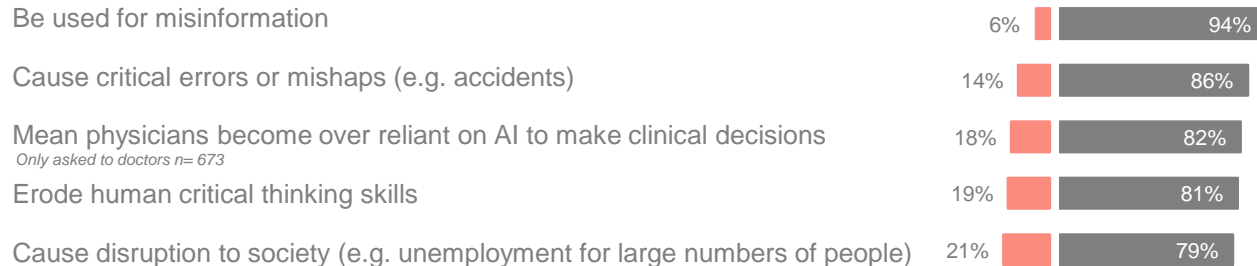
Scale: A great extent, some extent, not at all, don't know/not sure (bottom box and top 2 box excl. don't know)

Base: n=2887

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

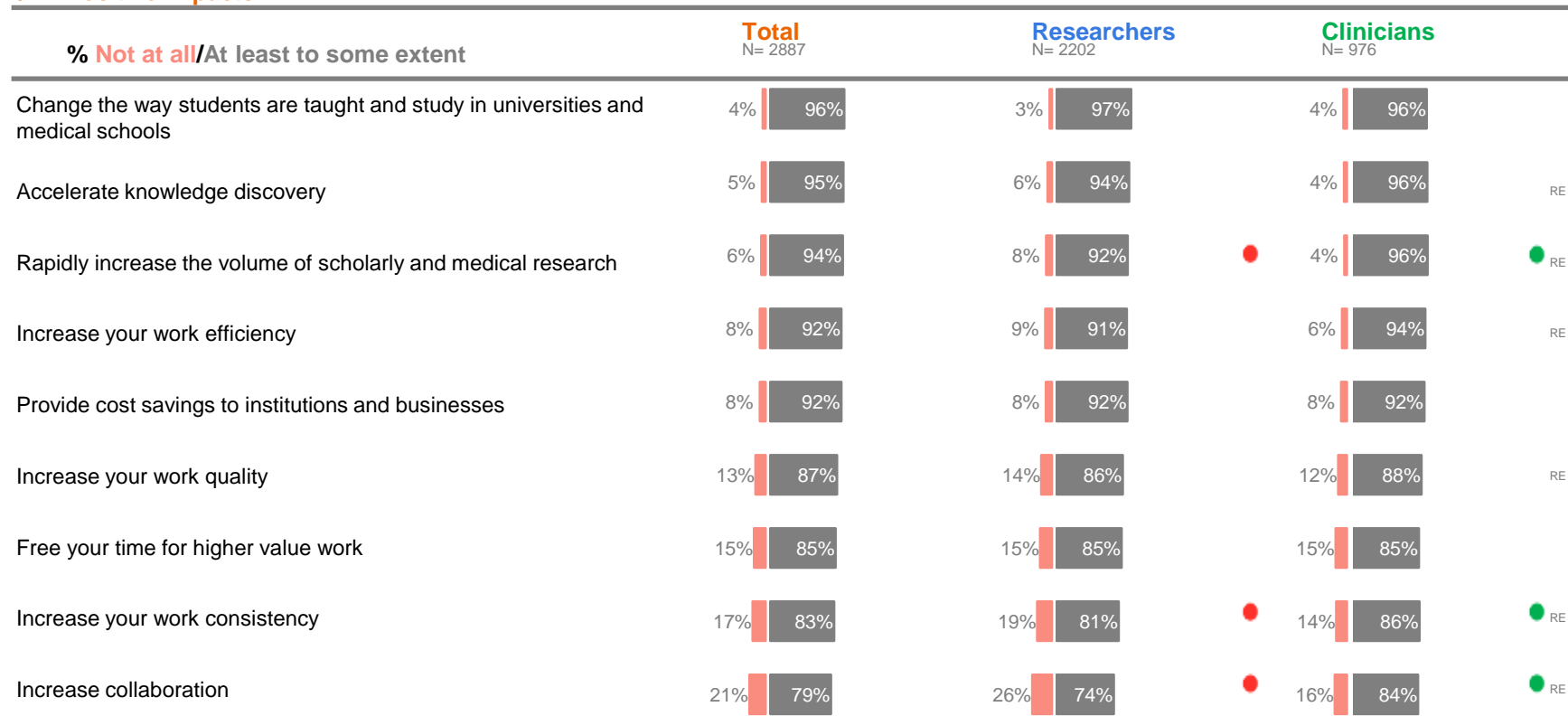
## 2/2 – Negative Impacts

% **Not at all**/At least to some extent



# 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



Total

Researchers

Clinicians



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

● ● Global

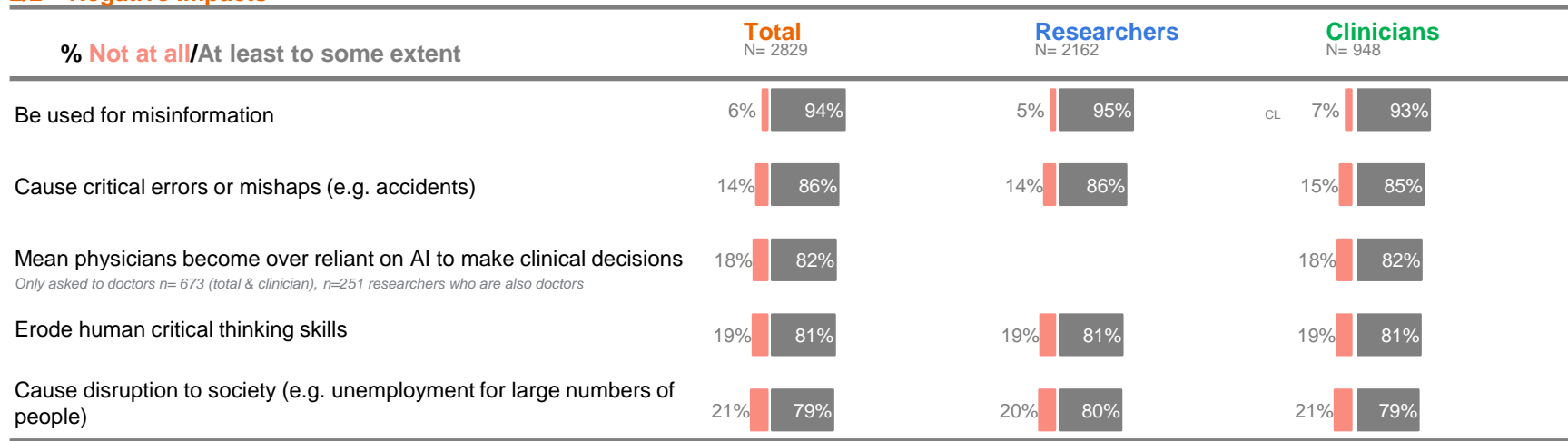
Scale: A great extent, some extent, not at all, don't know/not sure (bottom box and top 2 box excl. don't know)

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

Base: n=2887

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

## 2/2 – Negative Impacts



Total

Researchers

Clinicians



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



Global

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

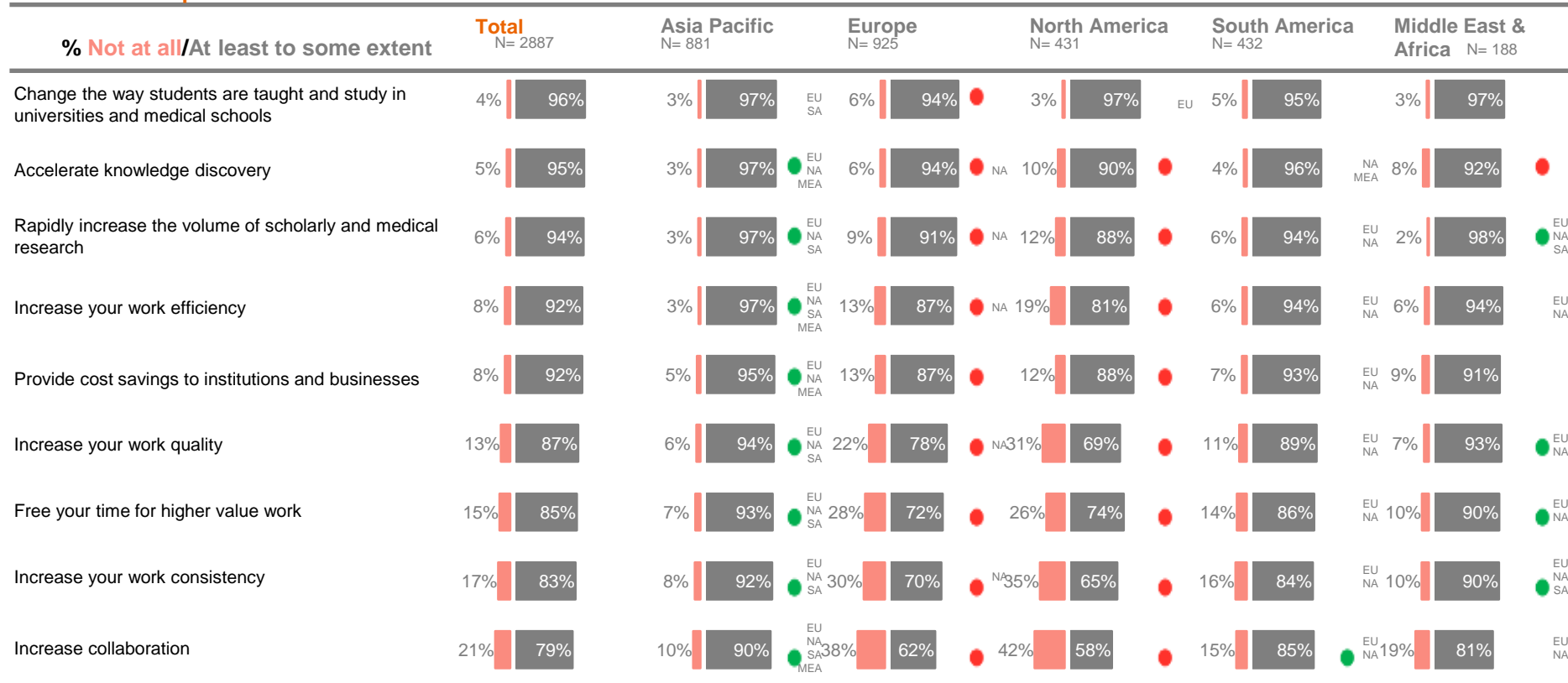
Scale: A great extent, some extent, not at all, don't know/not sure (bottom box and top 2 box excl. don't know)

Base: n= 2829

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 ...?

# 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)

Total



Back to home

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

● ● Global

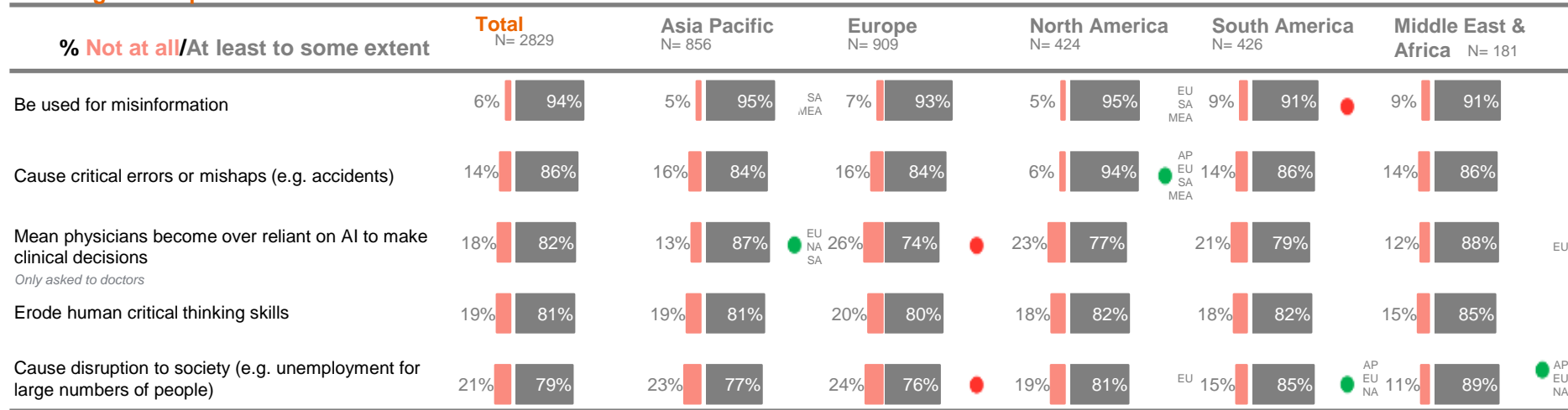
Role/ Region/ Country (indicated by first two letters e.g. AP = APAC)

Base: n=2887



# 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)

Total



Back to home

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



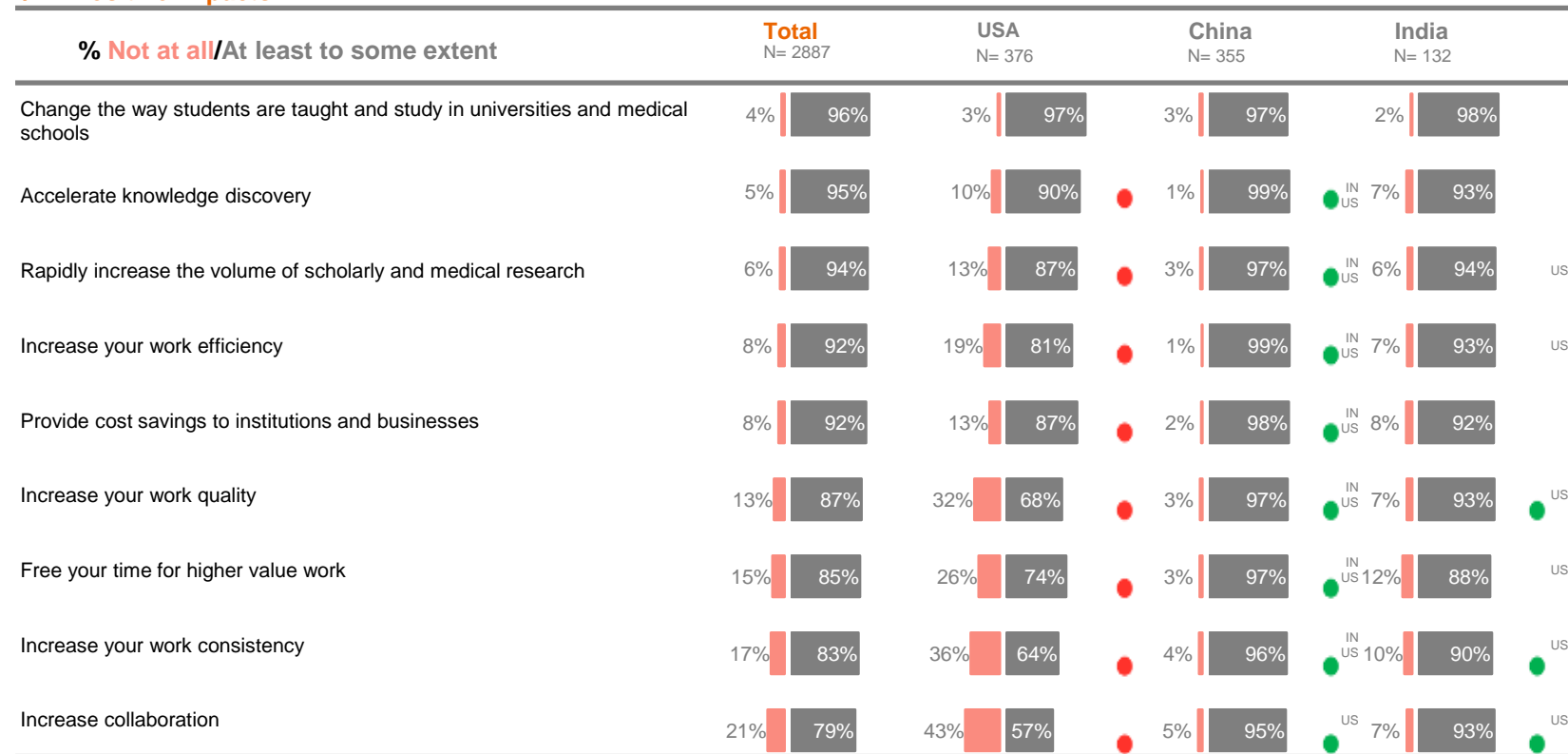
Global

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

Base: n= 2829

AI 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



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)

Base: n= 2887

Total



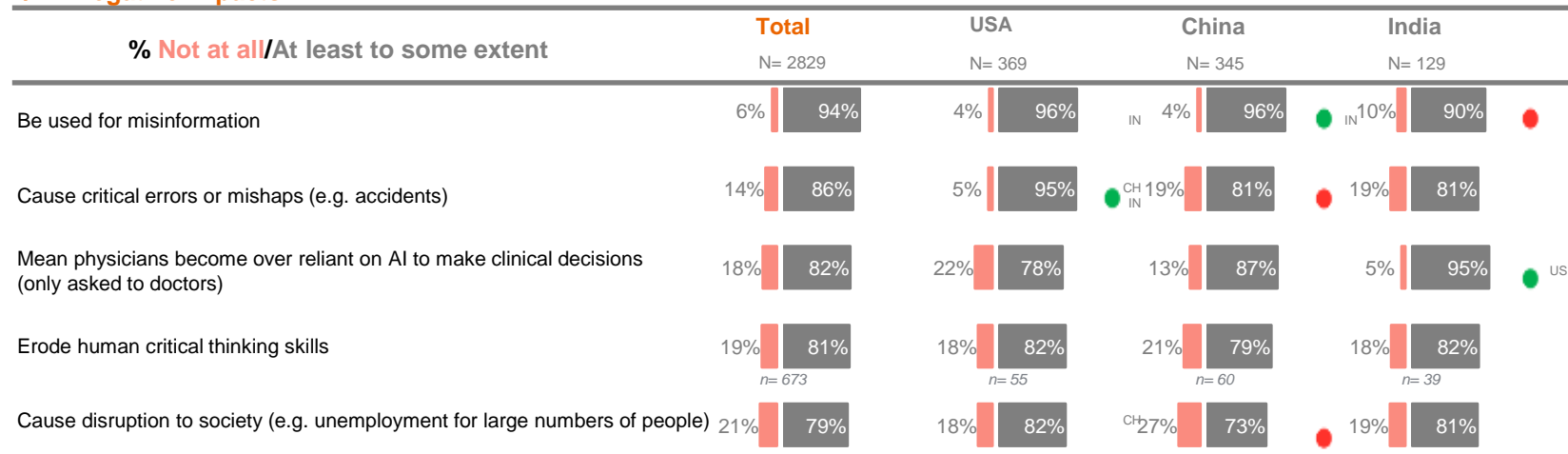
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Significantly higher than...

● ● Global

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

# 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



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)

Total



Significantly higher/ lower than...  
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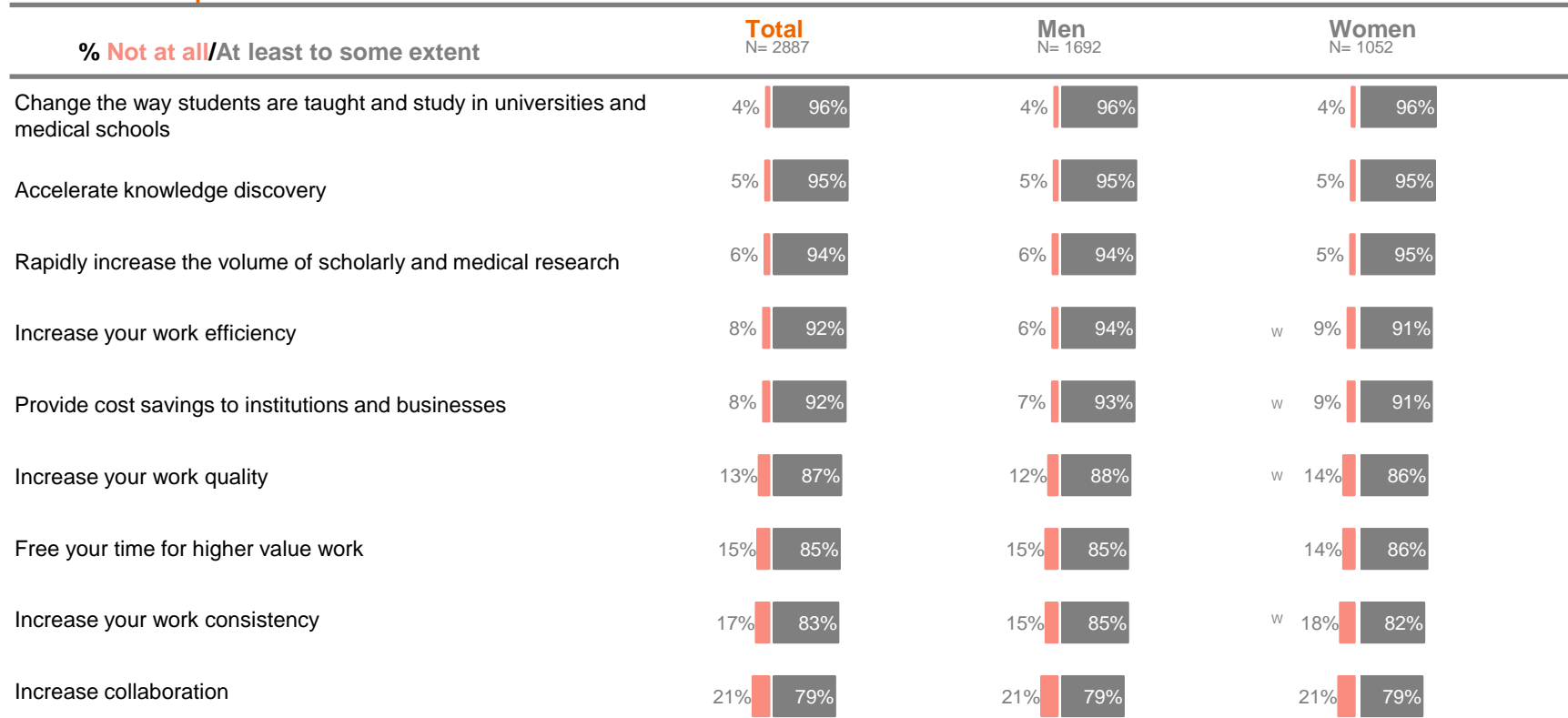
● ● Global

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

Base: n= 2829

# Men are more likely to think AI 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...?

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

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

Base: n= 2887

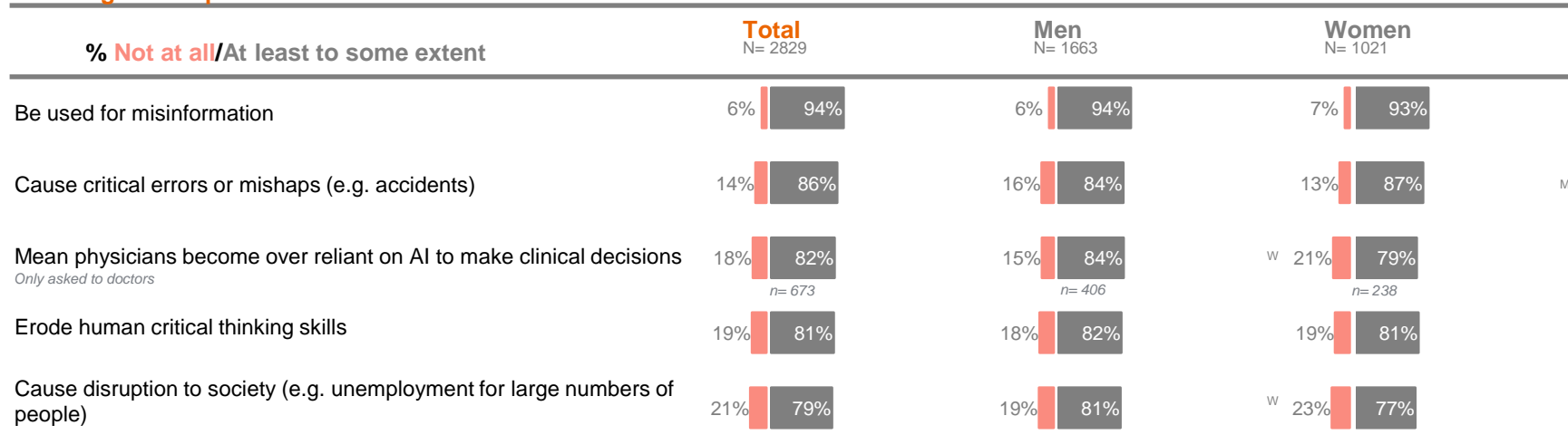
Total



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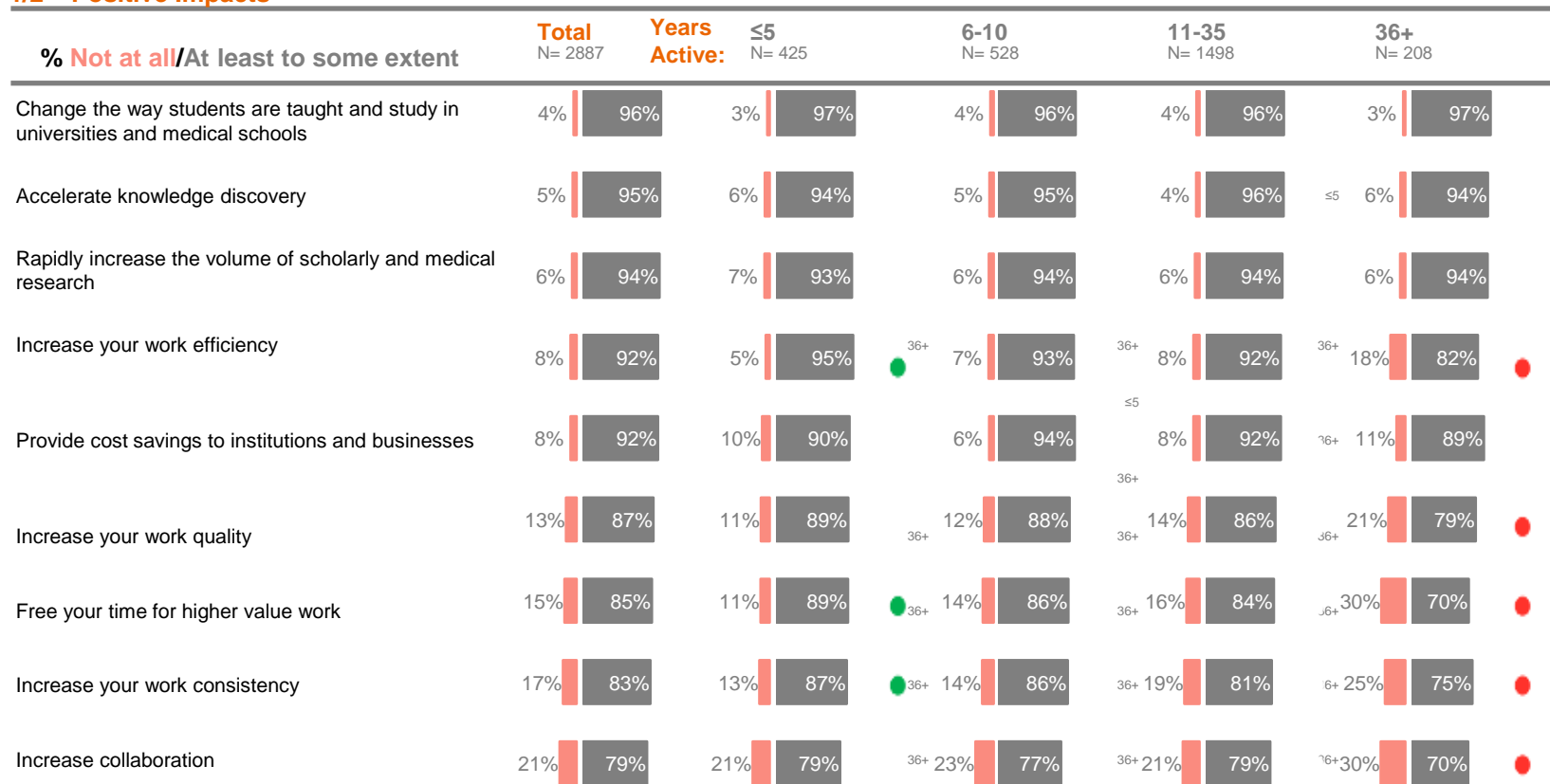
# Men are more likely to think AI will cause disruption to society (to at least some extent) than women

## 2/2 – Negative Impacts



# 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

## 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)

Base: n= 2887

Total



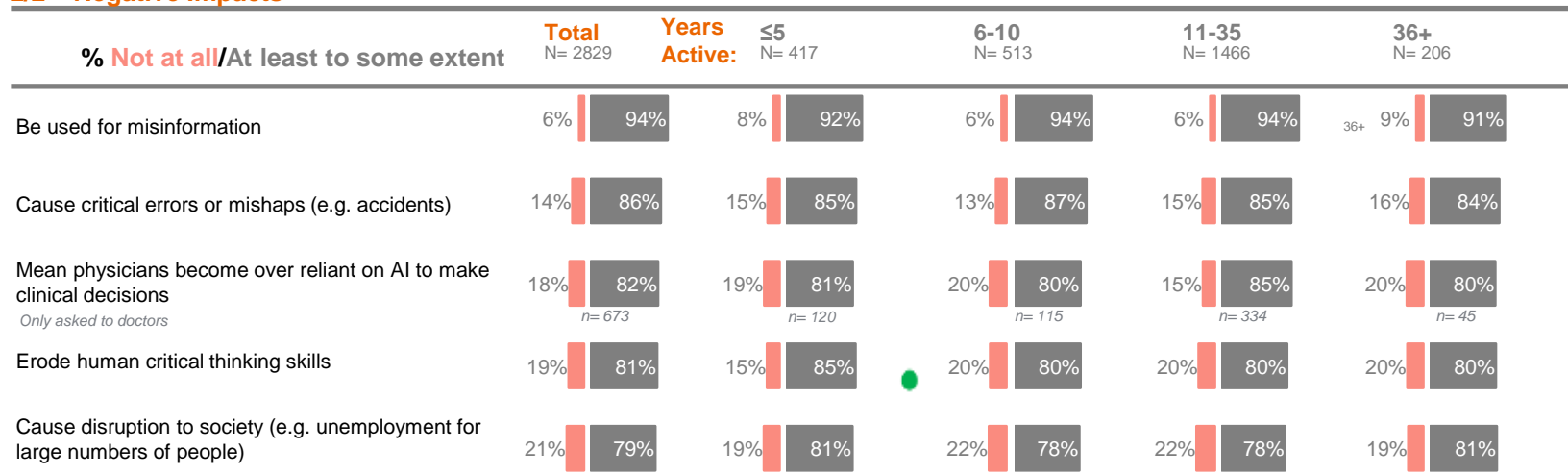
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Significantly higher than...

● ● Global

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

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

## 2/2 – Negative Impacts


[Total](#)

[Back to home](#)

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

● ● Global

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

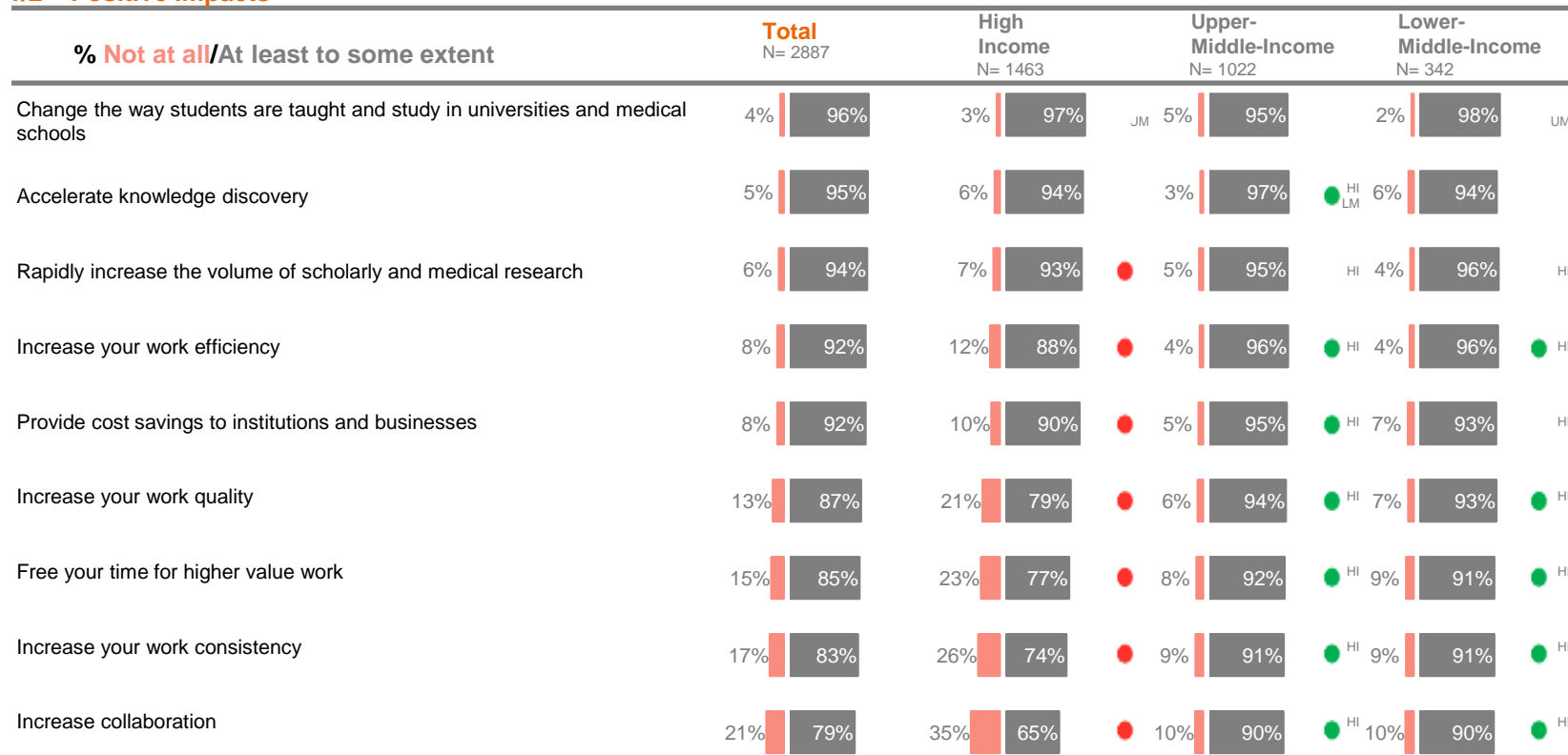
Questions: Thinking about the impact AI will have on society and your work, to what extent do you think over the next 2 to 5 years it will...?

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

Base: n= 2829

# 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



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)

Base: n= 2887

Total



Significantly higher/ lower than...  
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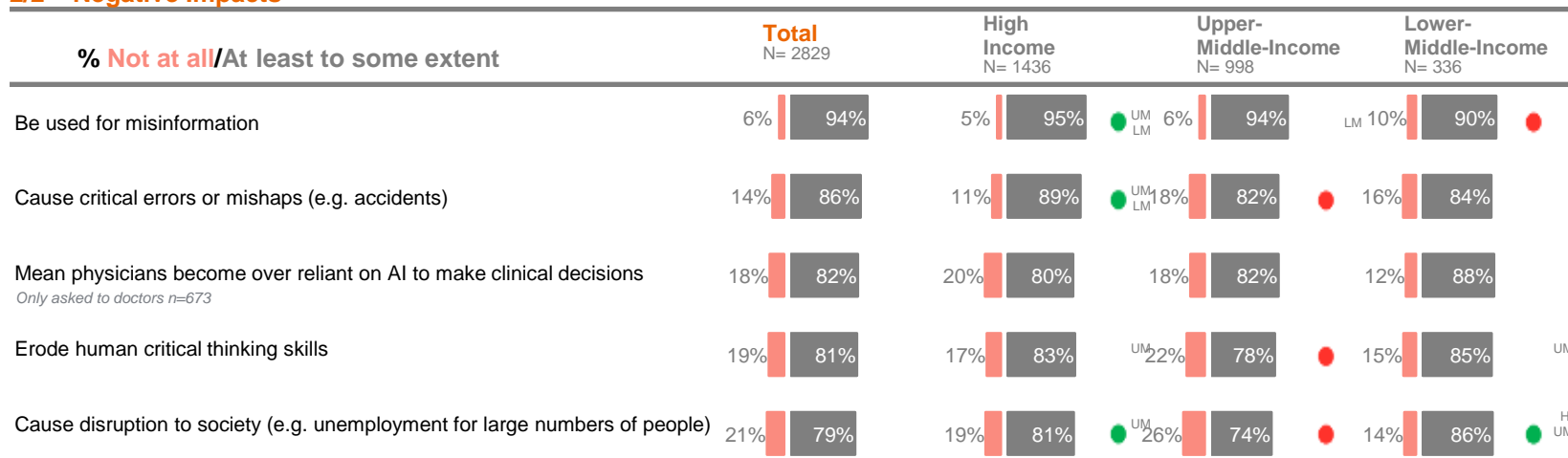
● ● Global

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



# High income markets are more likely to expect negative impacts from AI

## 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)

Total



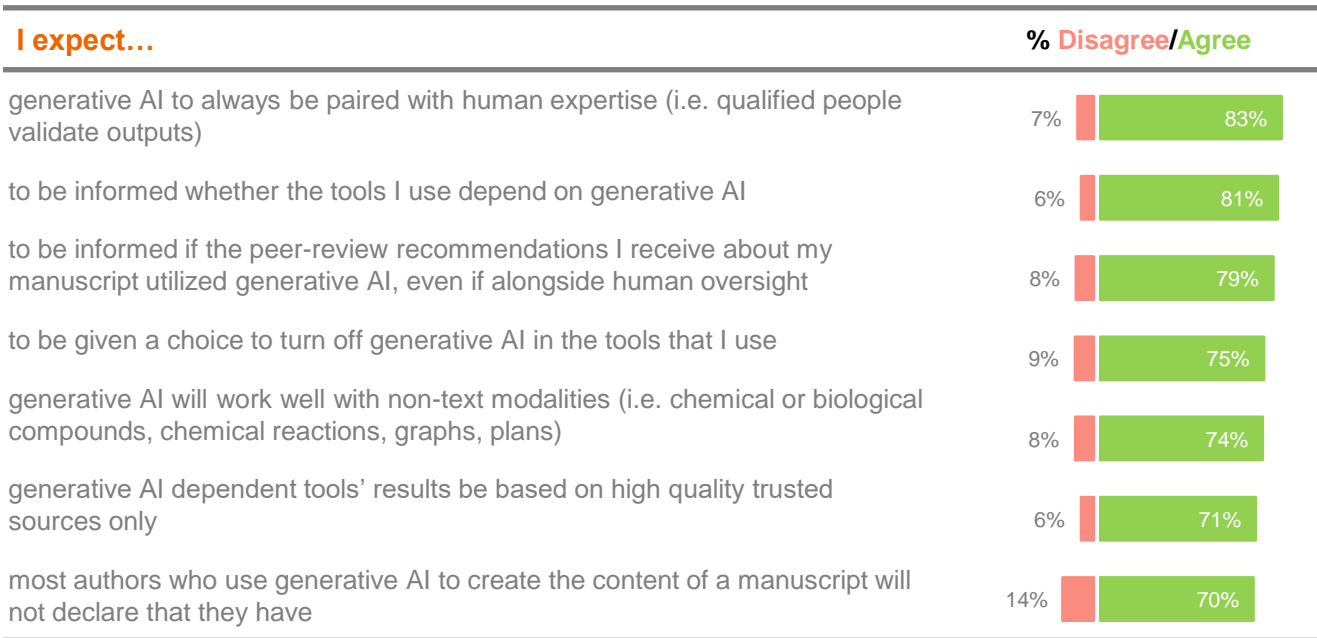
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● ● Global

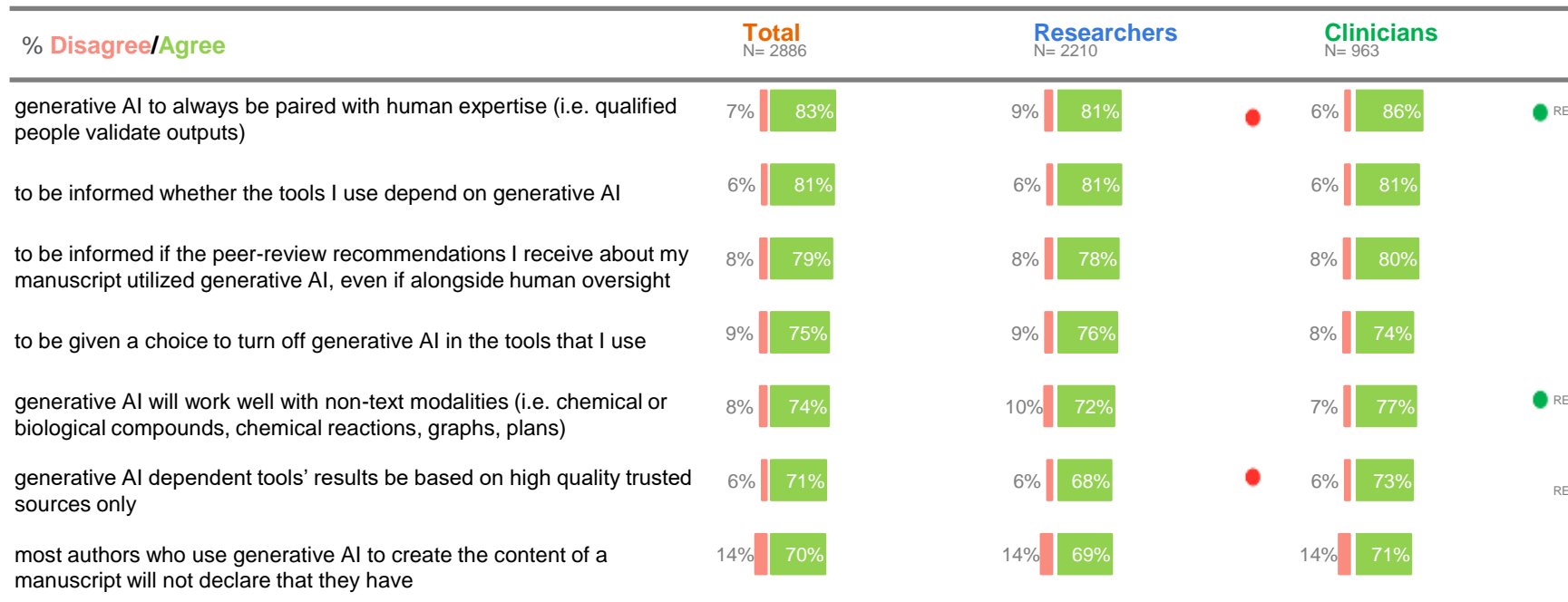
Role/ Region/ Country (indicated by first two letters e.g. AP = APAC)

Base: n= 2829

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



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



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

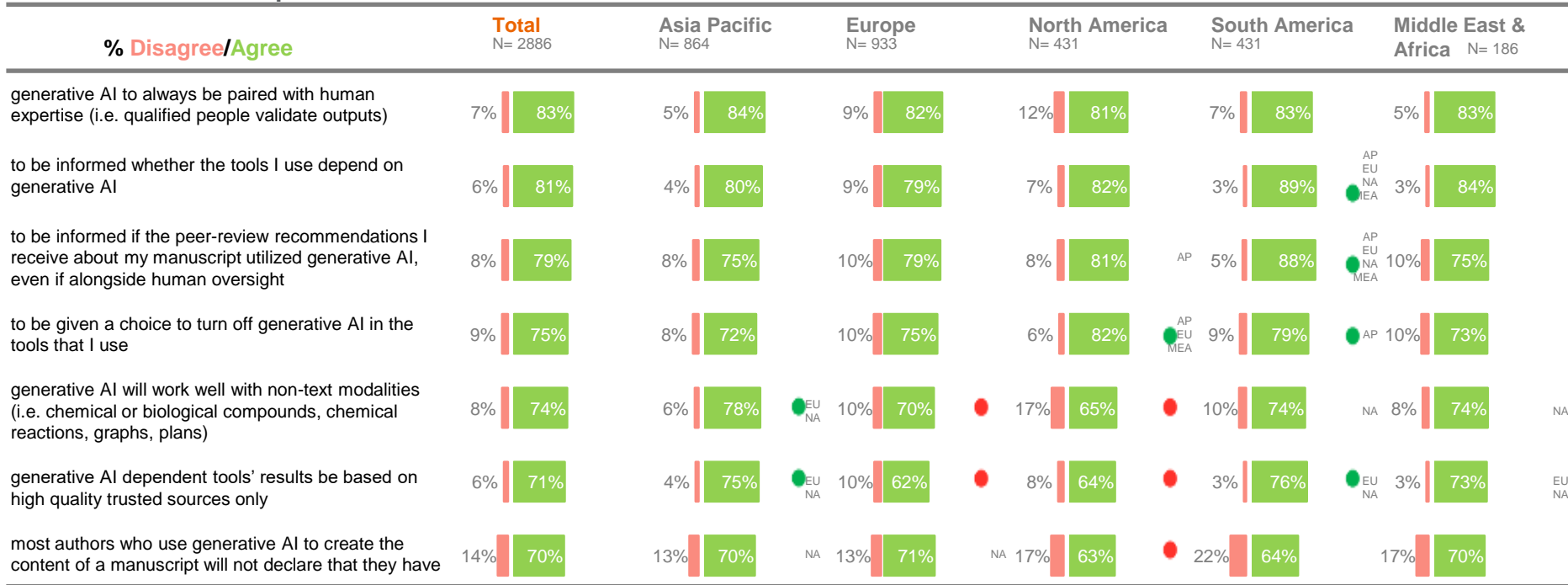
Total

Researchers

Clinicians



# 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 AI



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)

Total



Back to home

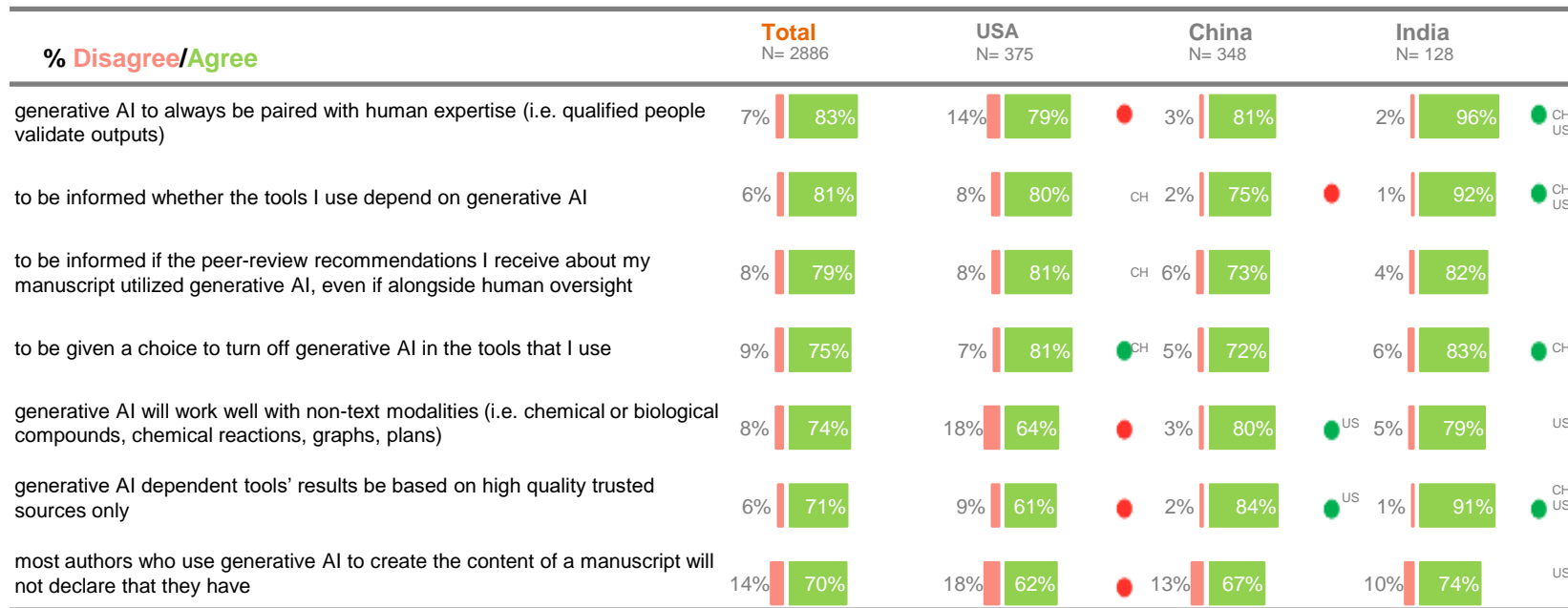
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Significantly higher than...

● ● Global

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

Base: n= 2886

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



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)

Total



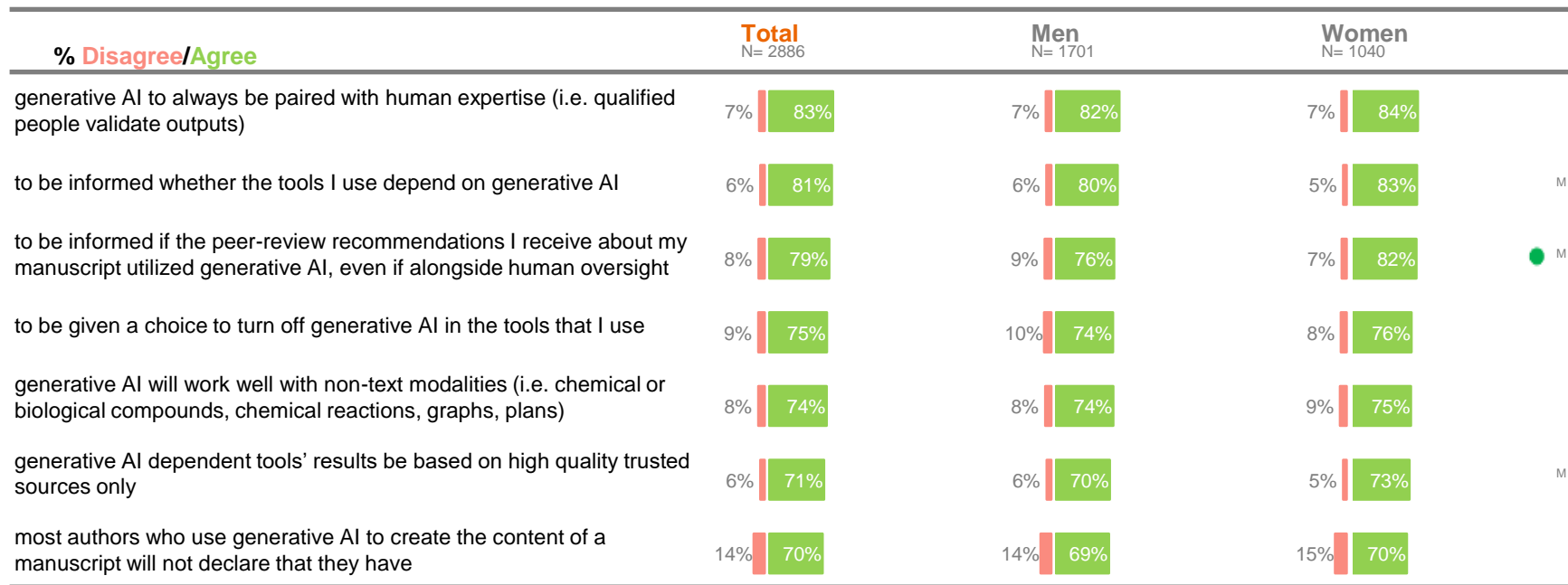
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● ● Global

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

Base: n= 2886

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



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 ...

Global

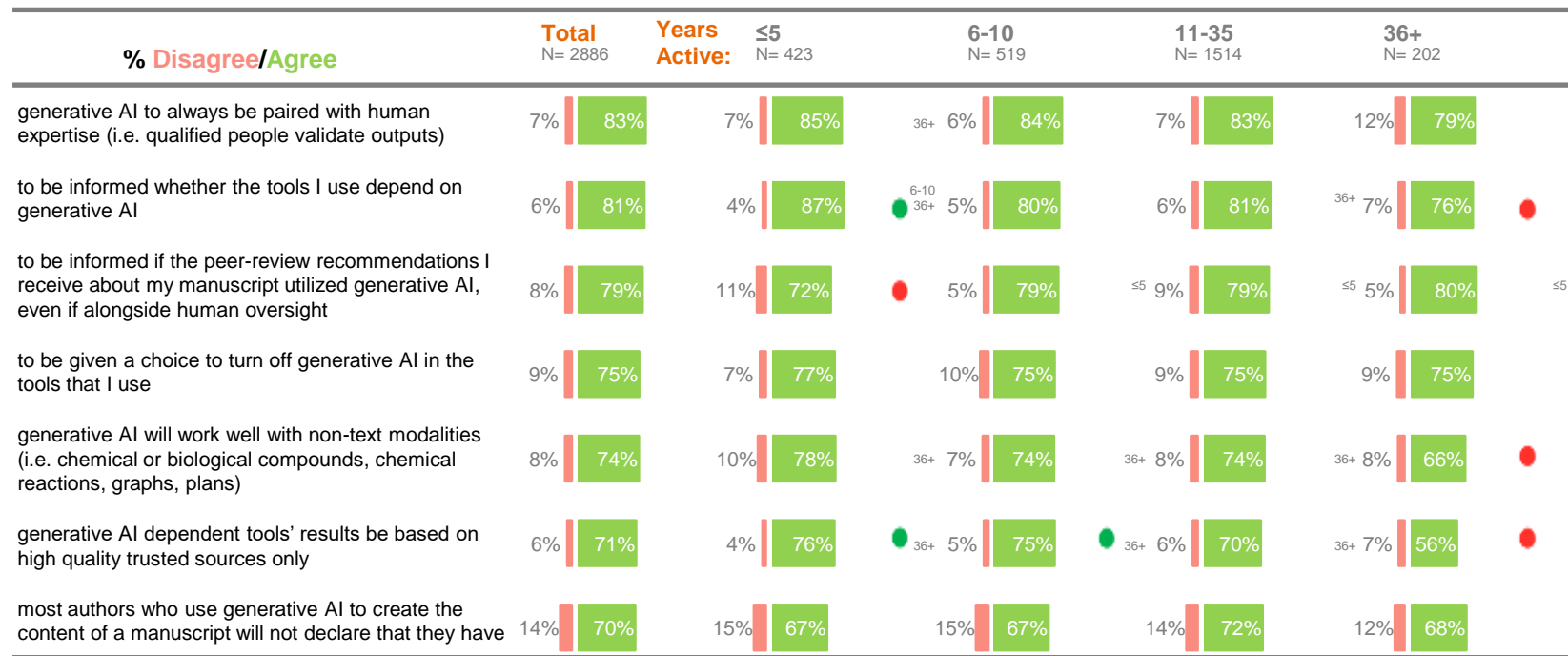
Gender/Generation (indicated by first letter e.g. M= Men)

Base: n= 2886

Total



# 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



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...

Global

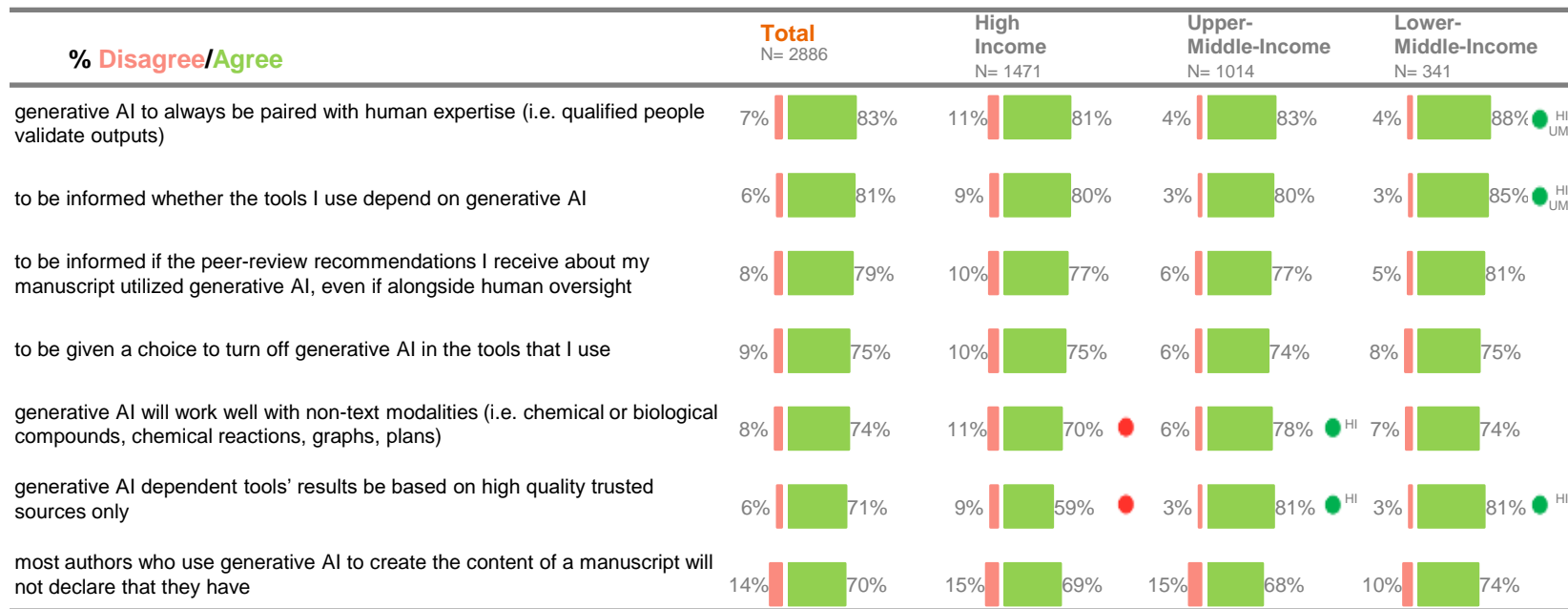
Role/ Region/ Country (indicated by first two letters e.g. AP = APAC)

Base: n= 2886

Total



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



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)

Total



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

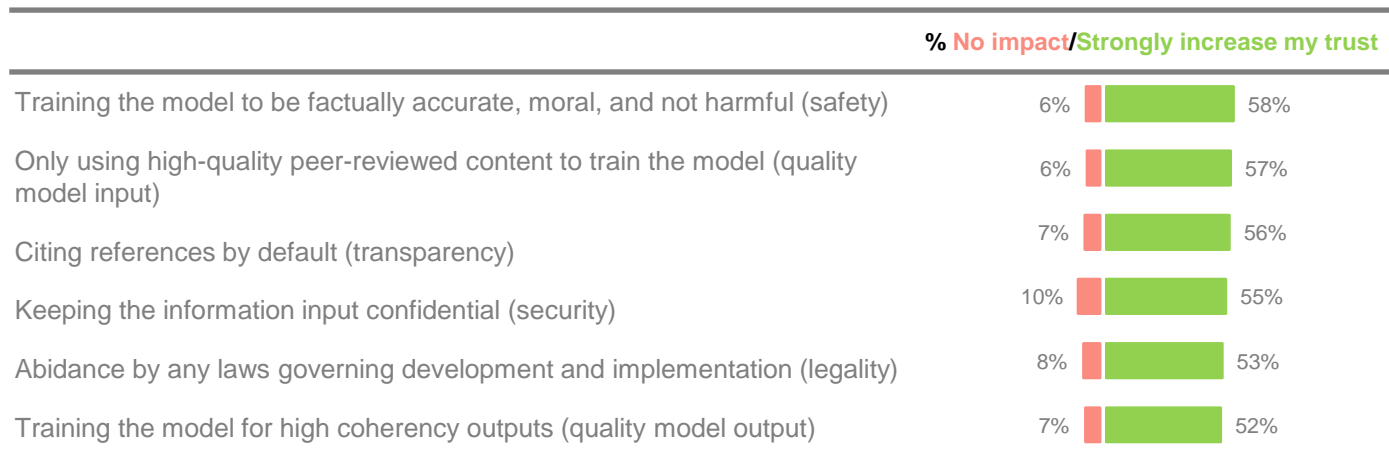
● ● Global

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

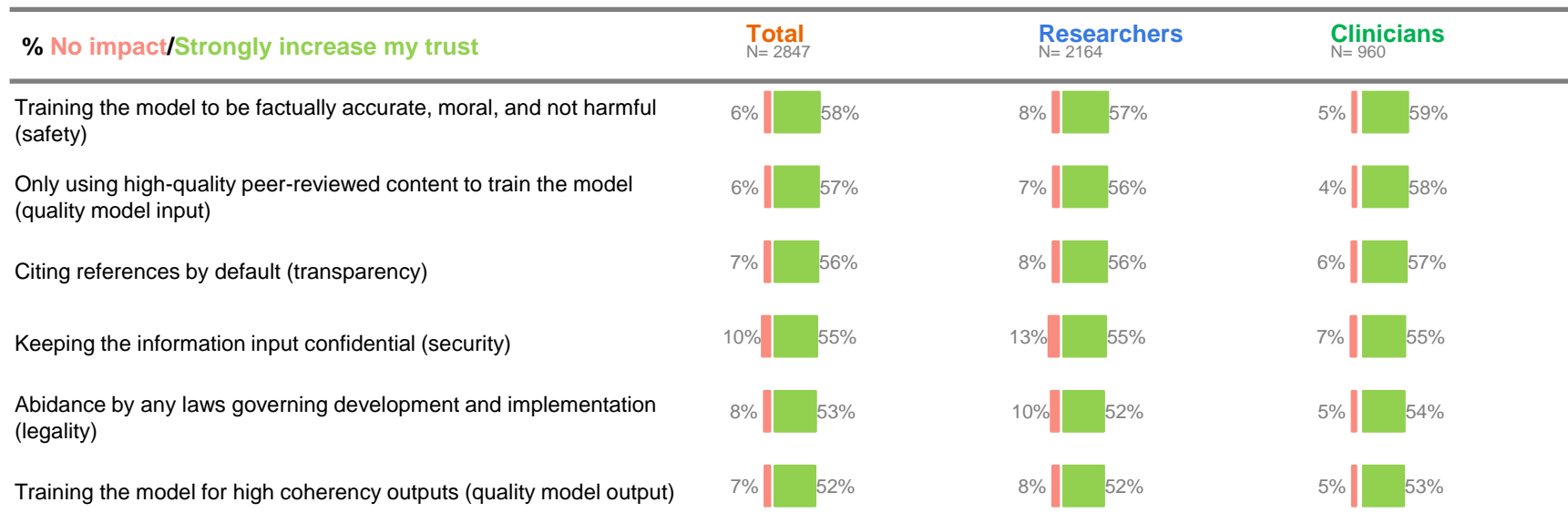
Base: n= 2886



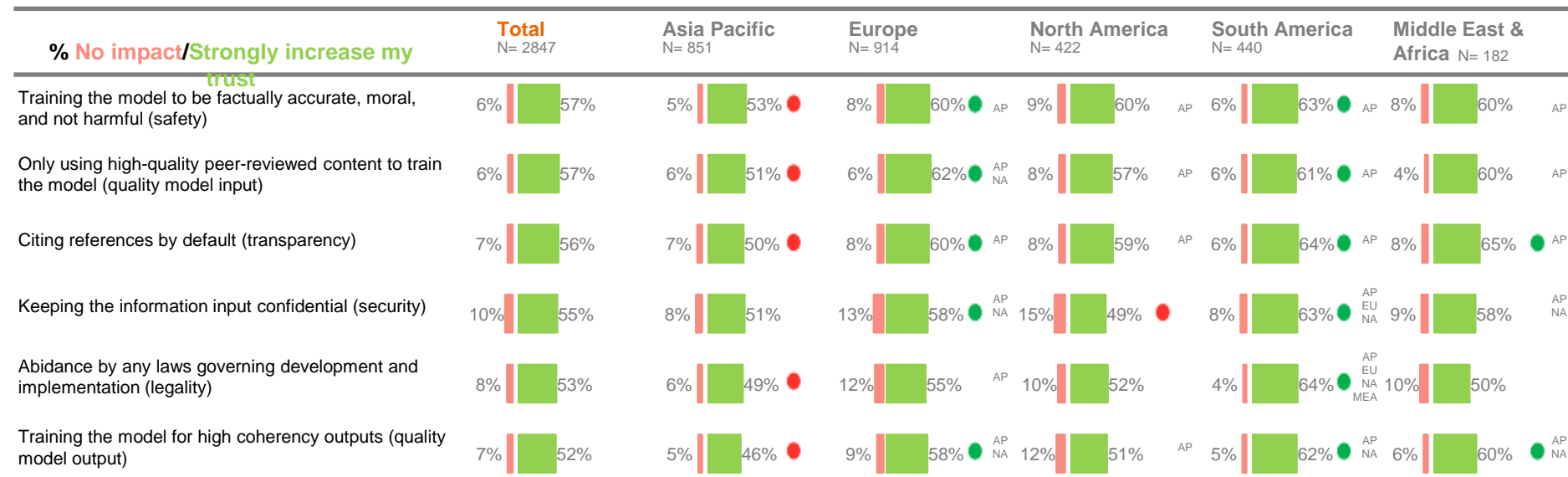
# Factors impacting **trust** in generative AI tools. Training an AI tool to not to be harmful, to only use peer-reviewed content and including references would strongly increase trust in generative AI tools



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



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. More in Europe and South America think the factors listed would strongly increase their trust, less so in APAC



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)

Total



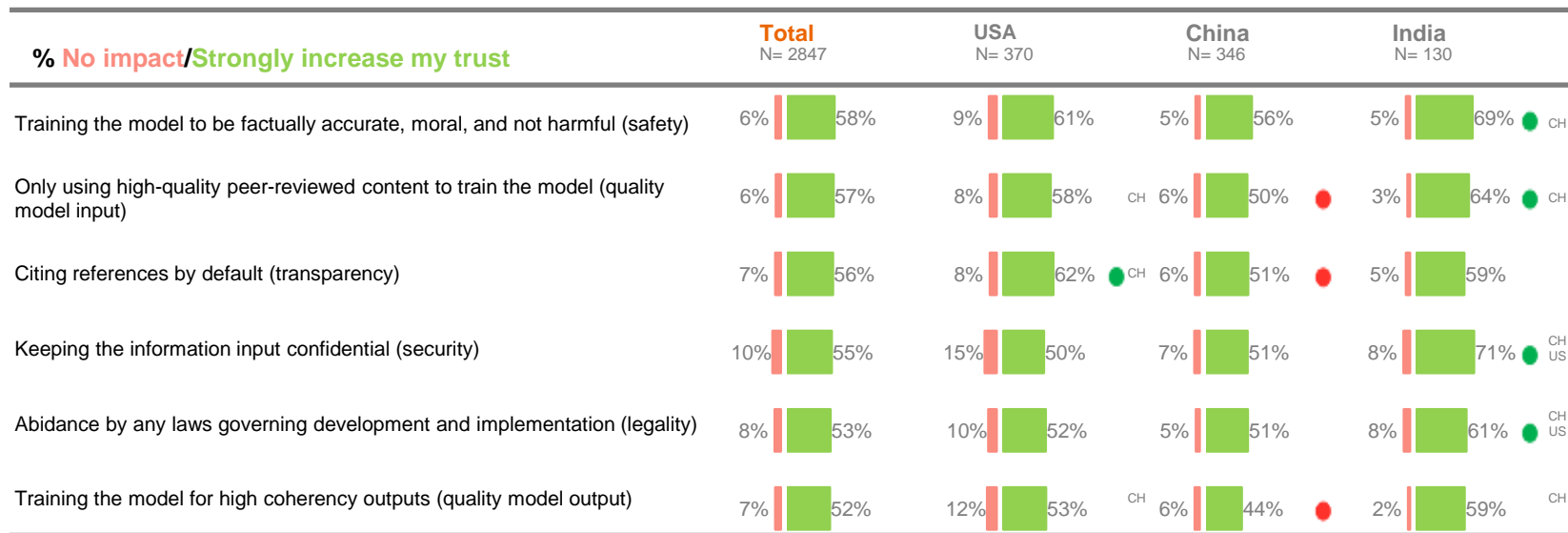
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Significantly higher than...

● ● Global

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

Base: n= 2847

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



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)

Total



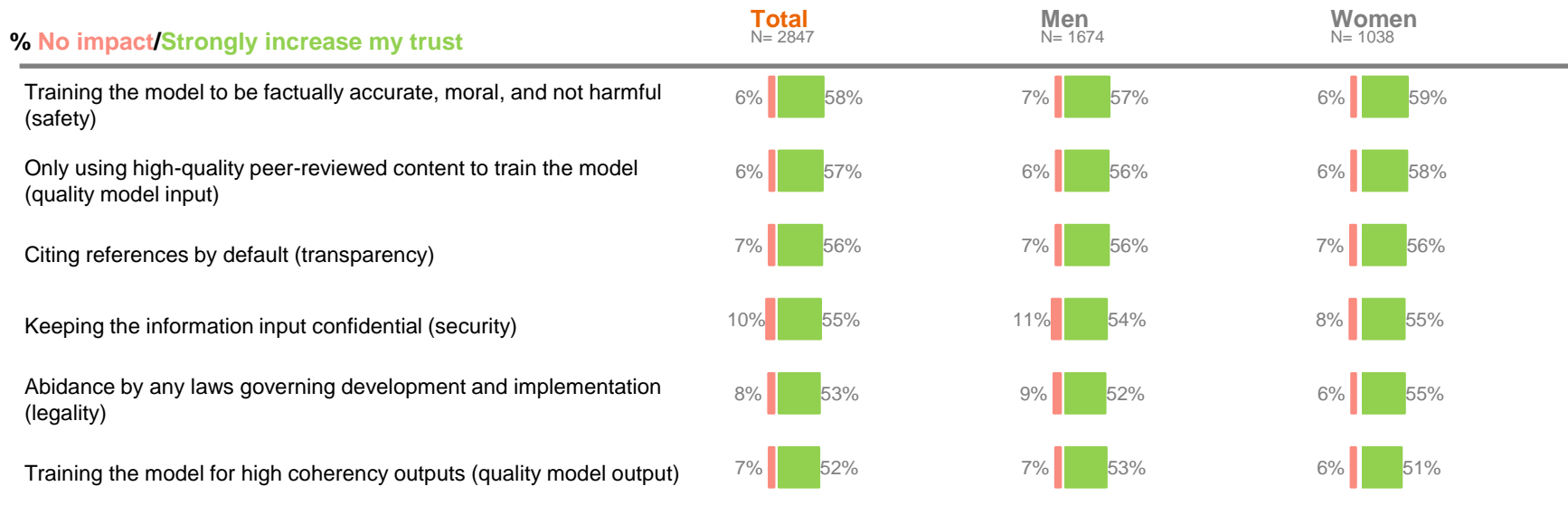
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 Significantly higher than...

  Global

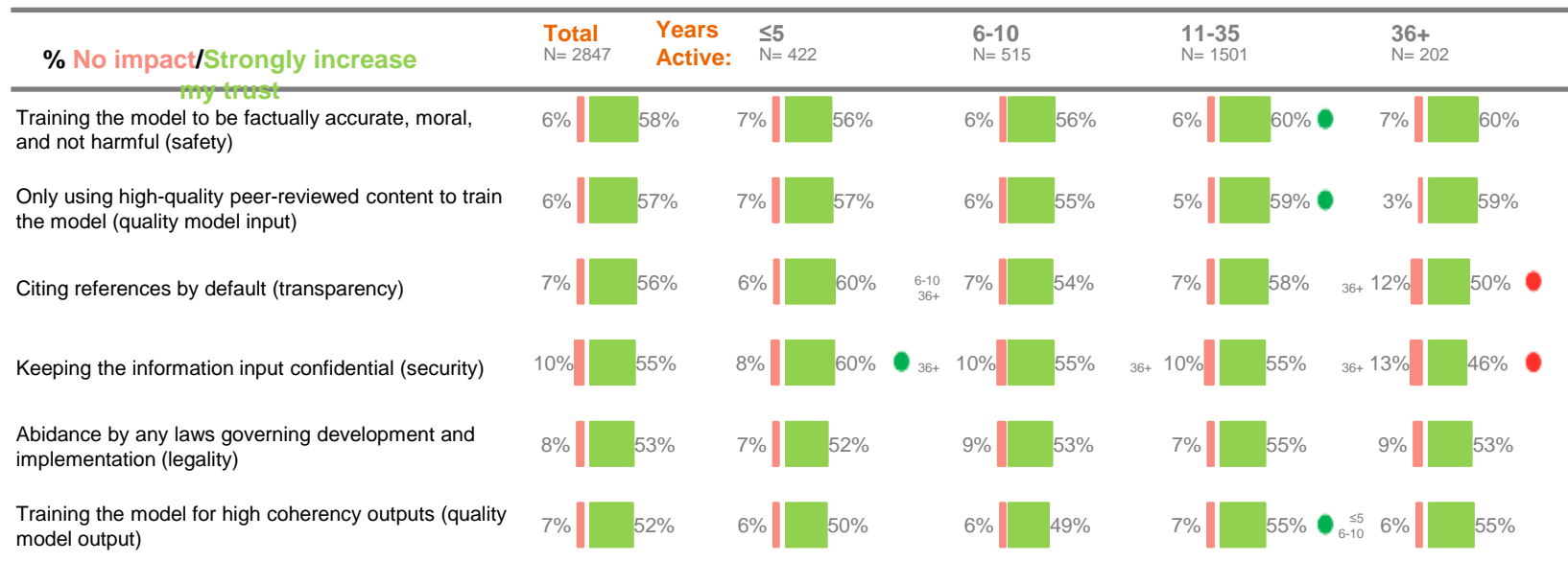
Role/ Region/ Country (indicated by first two letters e.g. AP = APAC)

Base: n= 2847

# 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



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 – little meaningful difference by years active



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)

Base: n= 2847

Total



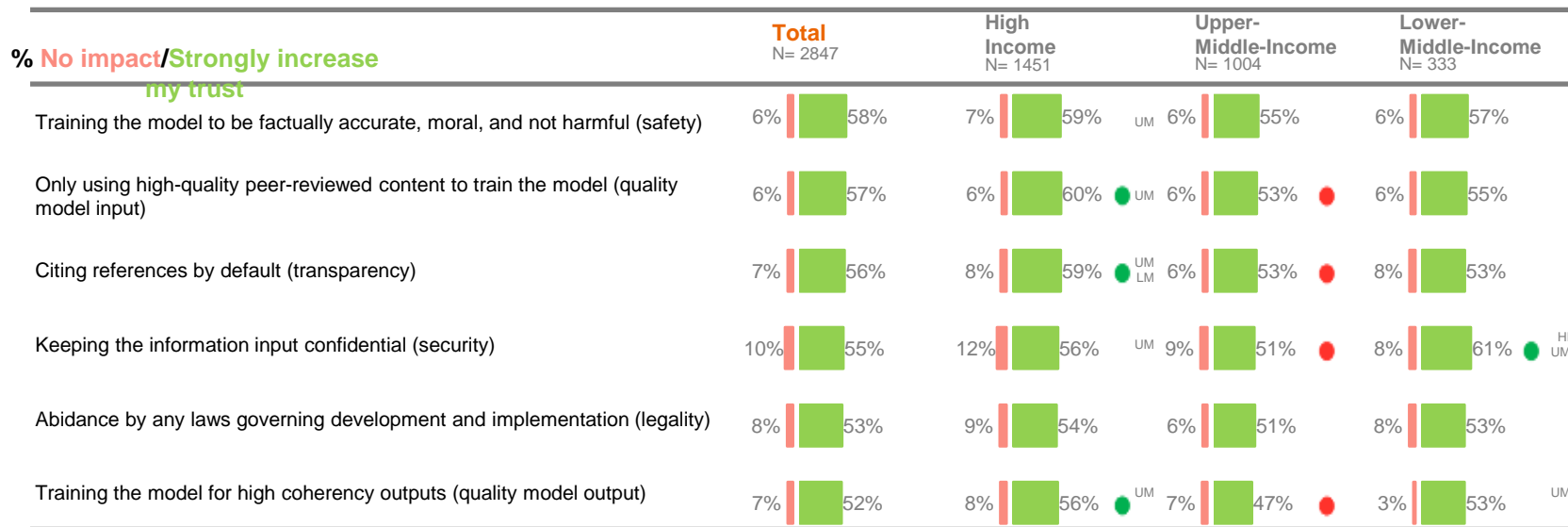
Back to home

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

● ● Global

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

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



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)

Total



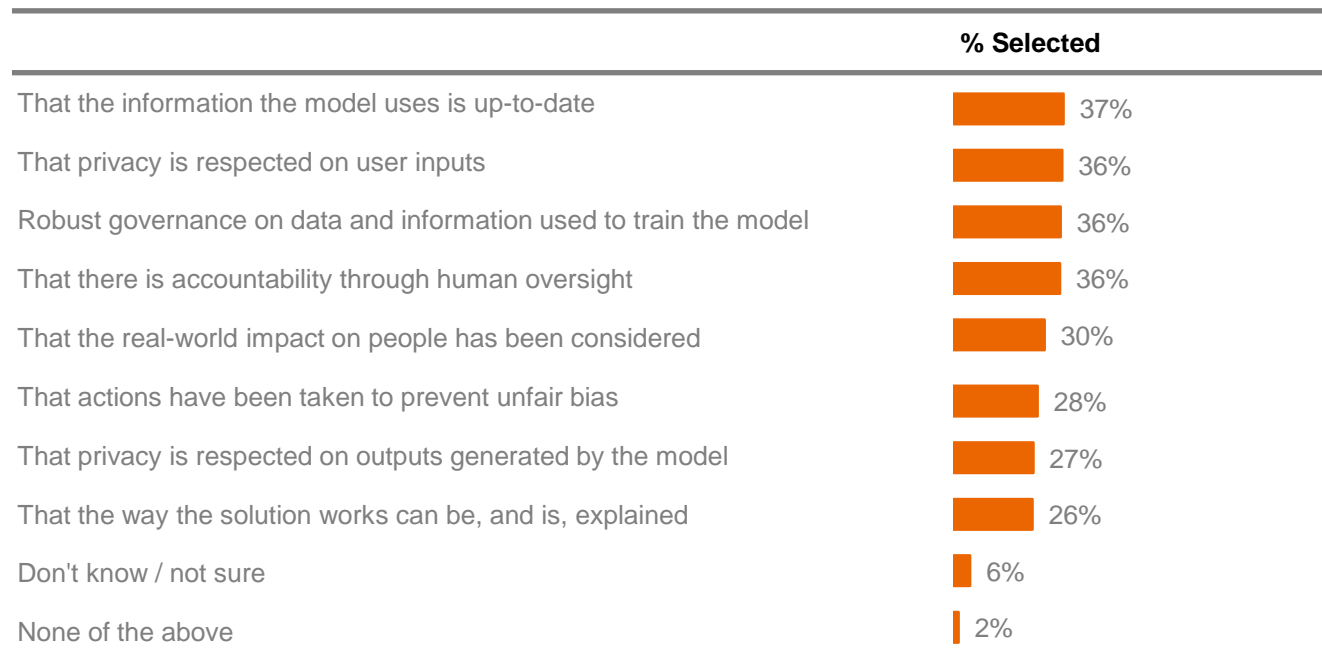
Significantly higher/ lower than...  
 Significantly higher than...

● ● Global

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

Base: n= 2847

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

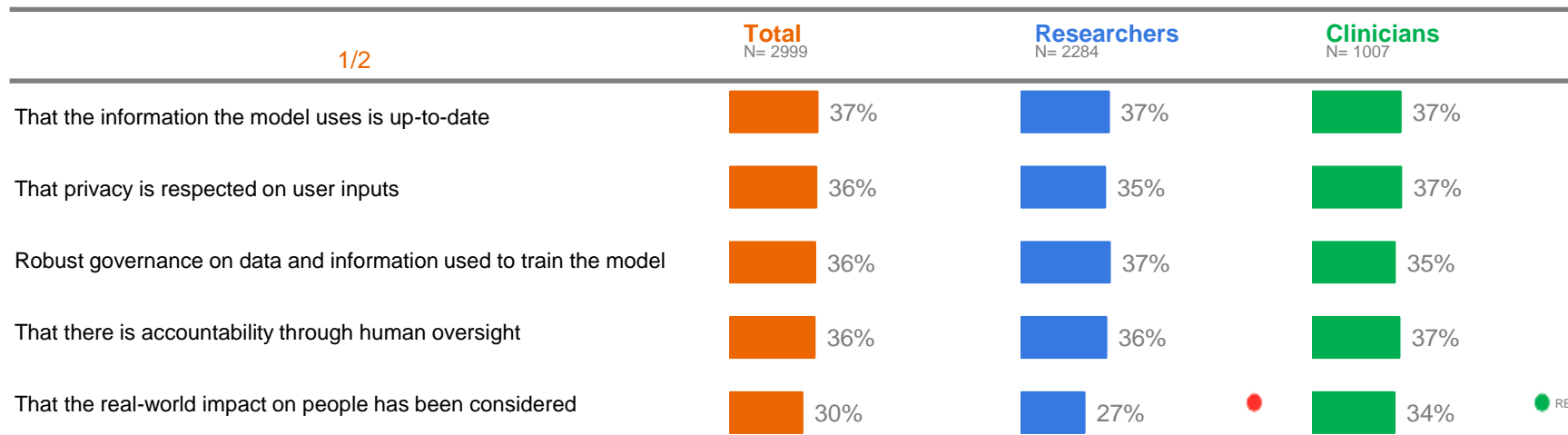


Questions: Which information areas about a tool's dependency on generative AI would most increase your comfort in using that tool?

Select: up to three  
 Base: n= 2999



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



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  
Base: n= 2999

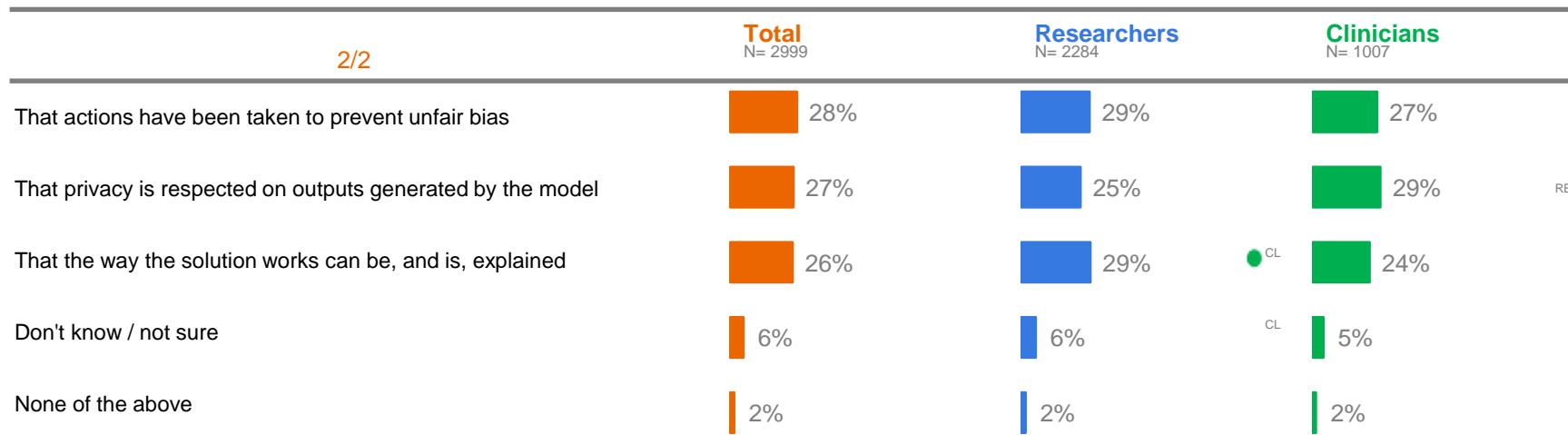
Total

Researchers

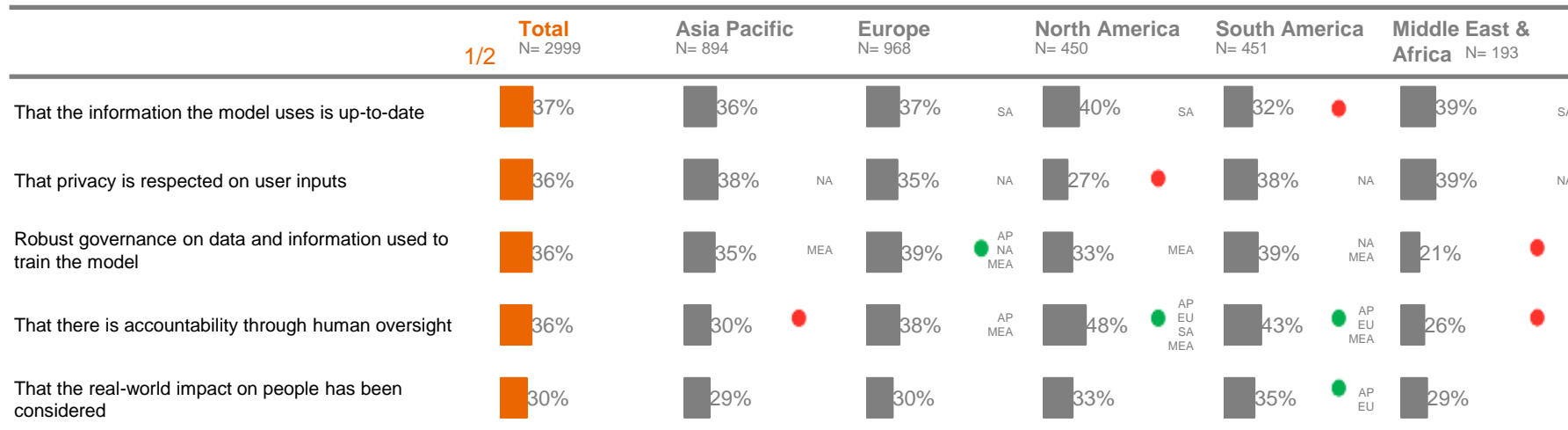
Clinicians



# 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



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)



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



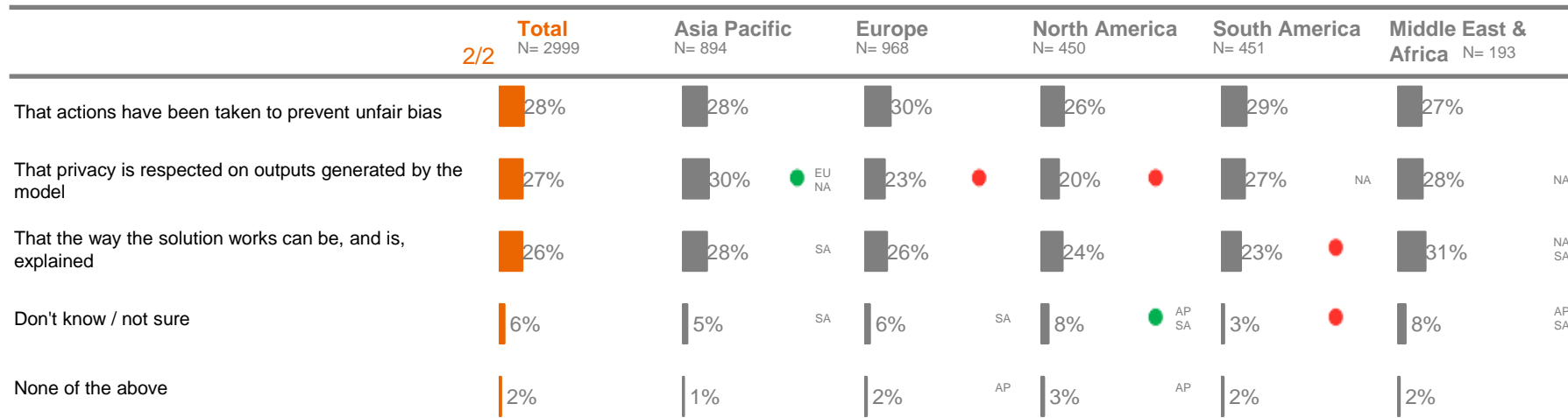
Significantly higher/ lower than...  
Significantly higher than...

● ● Global

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

Base: n= 2999

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)



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

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

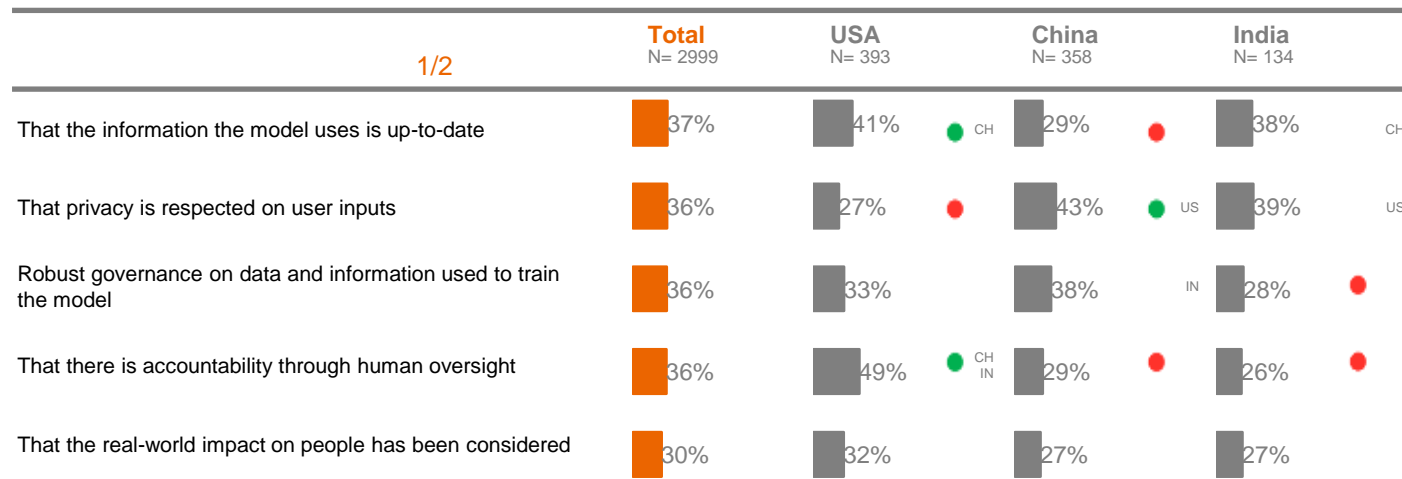
Base: n= 2999

Total

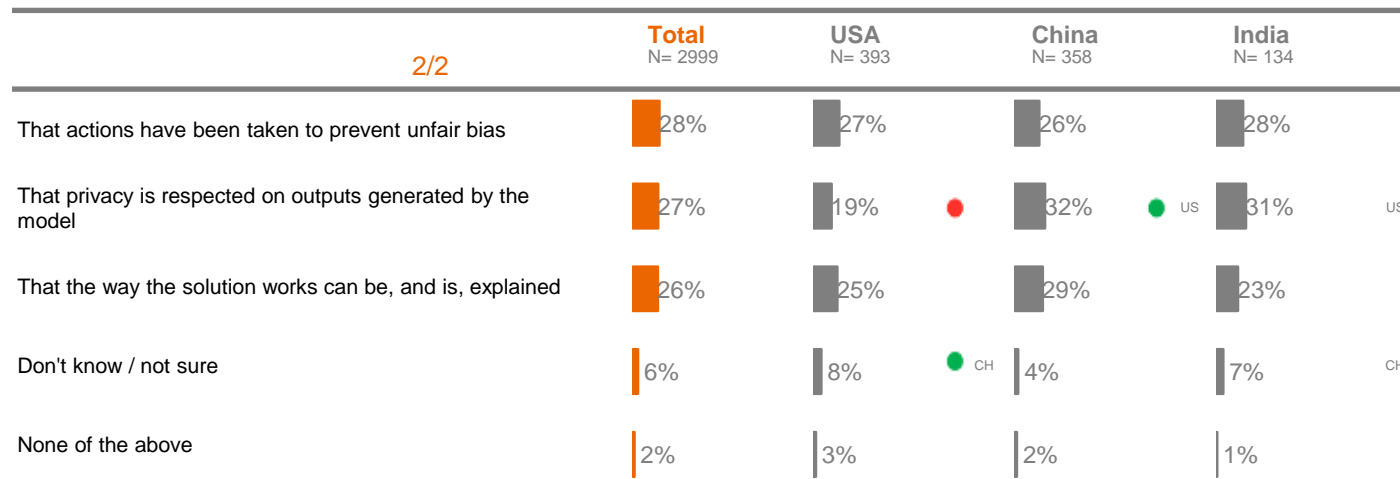


Significantly higher/ lower than...  
Significantly higher than...

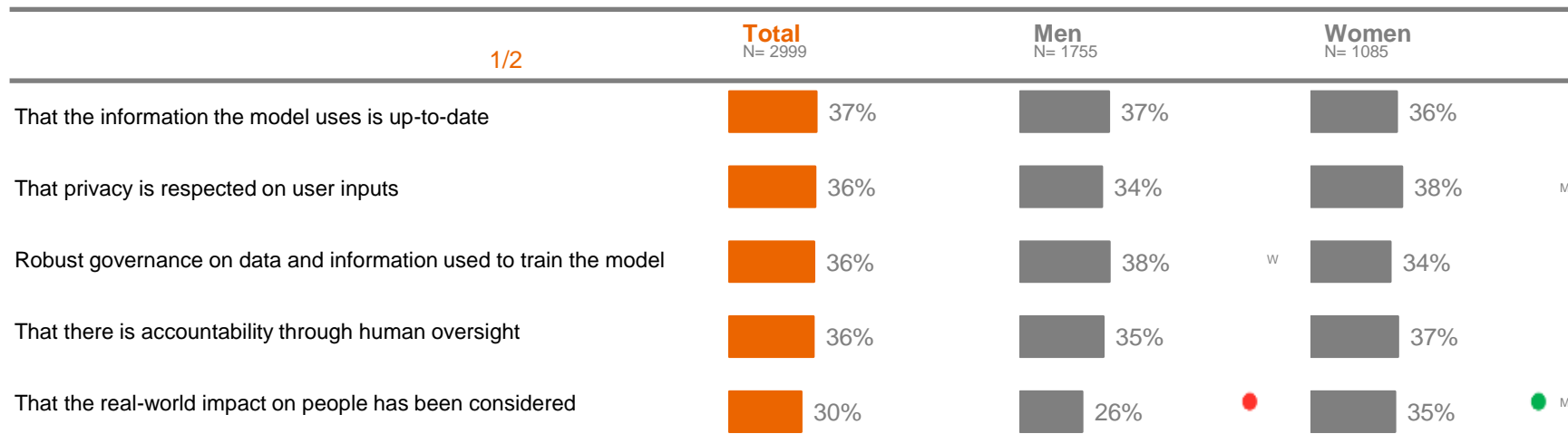
# Those in the USA are more likely to say that having accountability through human oversight would increase their **comfort** in that tool (1/2)



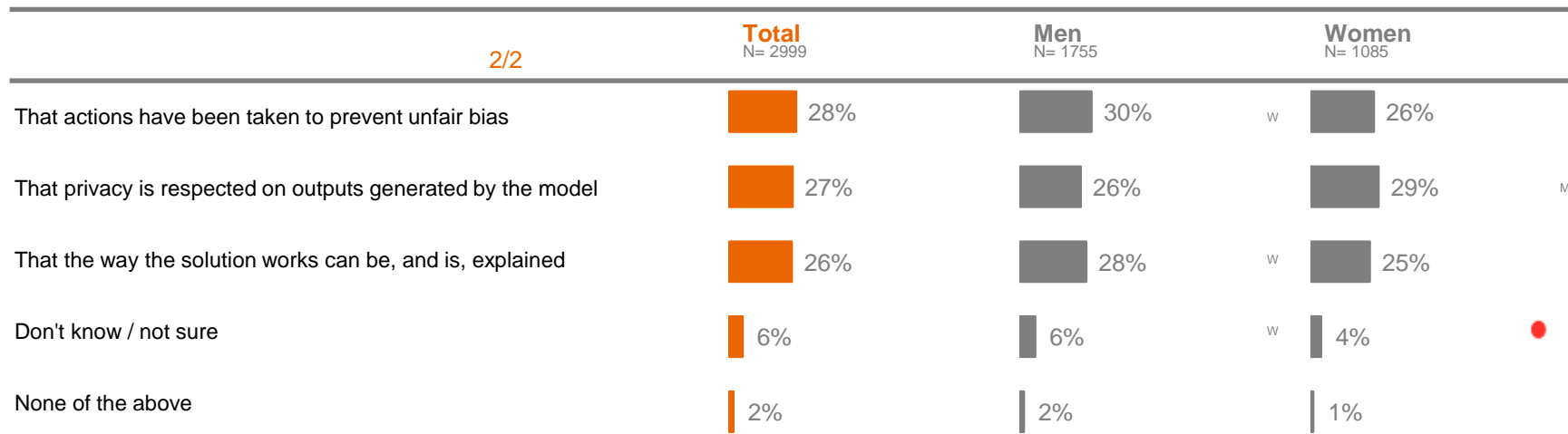
# Those in the USA are more likely to say that having accountability through human oversight would increase their **comfort** in that tool (2/2)



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

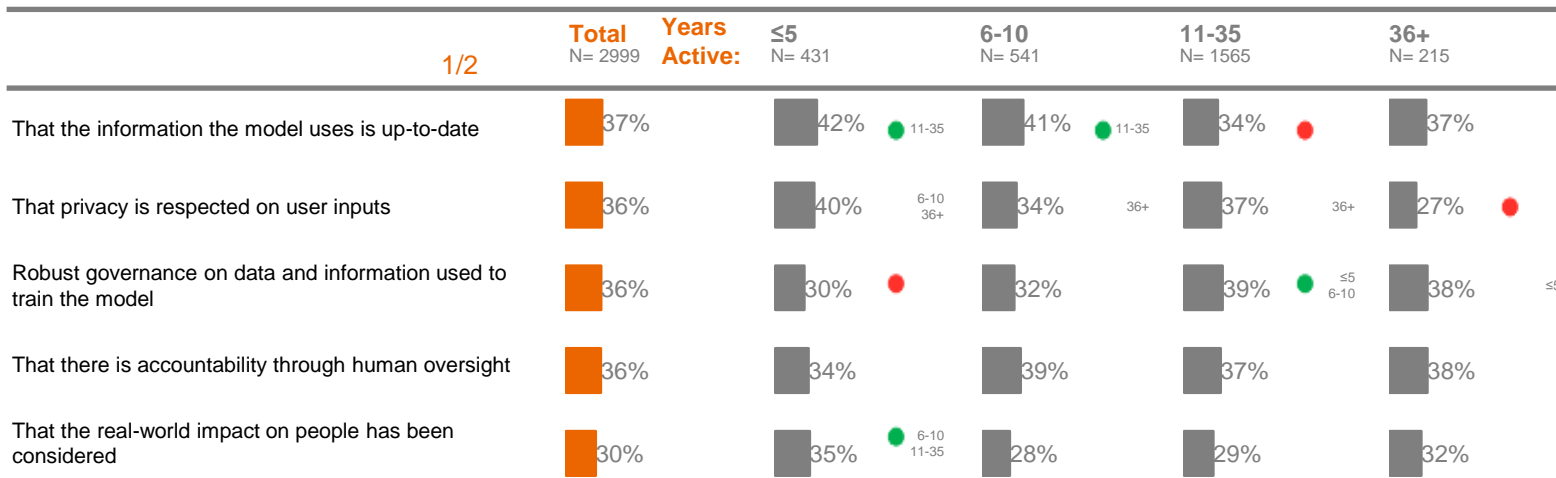


# More women say than men that the real-world impact on people being considered would increase their **comfort** (2/2)





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)



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

Total



Back to home

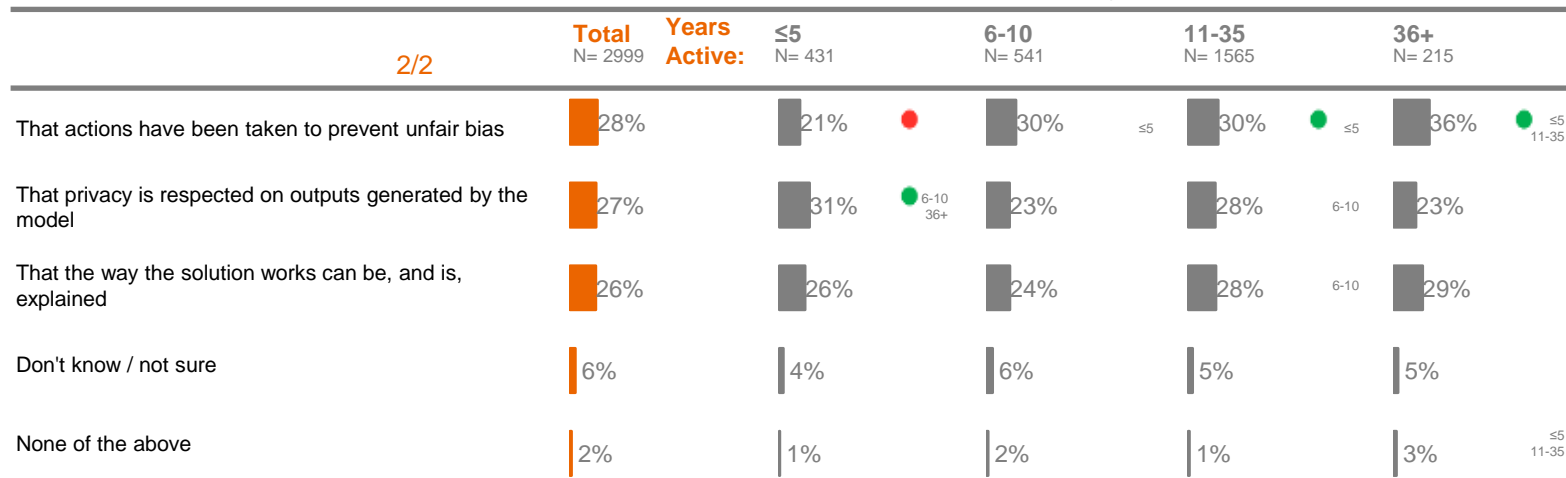
Significantly higher/ lower than...  
Significantly higher than...

Global

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

Select: up to three  
Base: n= 2999

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)



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

Total

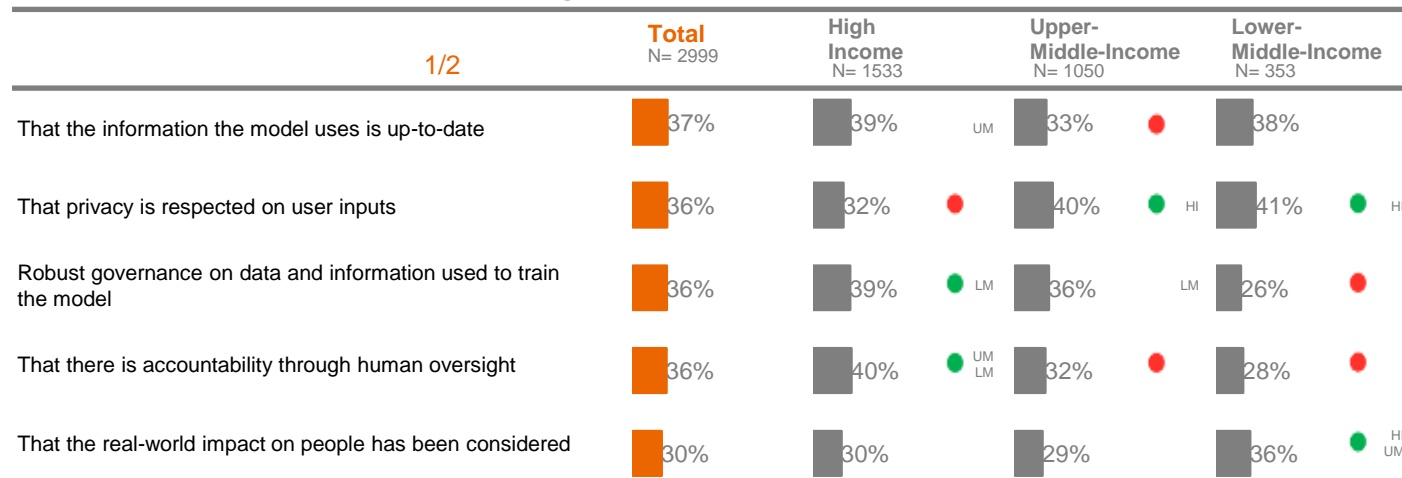


Significantly higher/ lower than...  
Significantly higher than...

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

Select: up to three  
Base: n= 2999

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 (1/2)



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

Base: n= 2999

Total

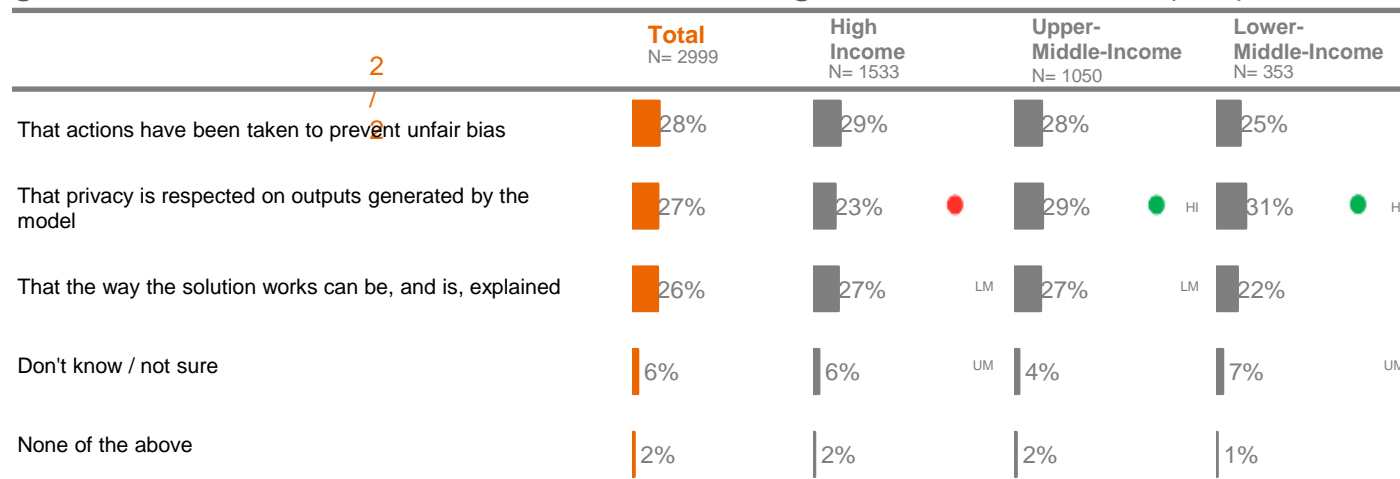


Significantly higher/ lower than...  
Significantly higher than...

● ● Global

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

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)



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

Base: n= 2999

Total



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

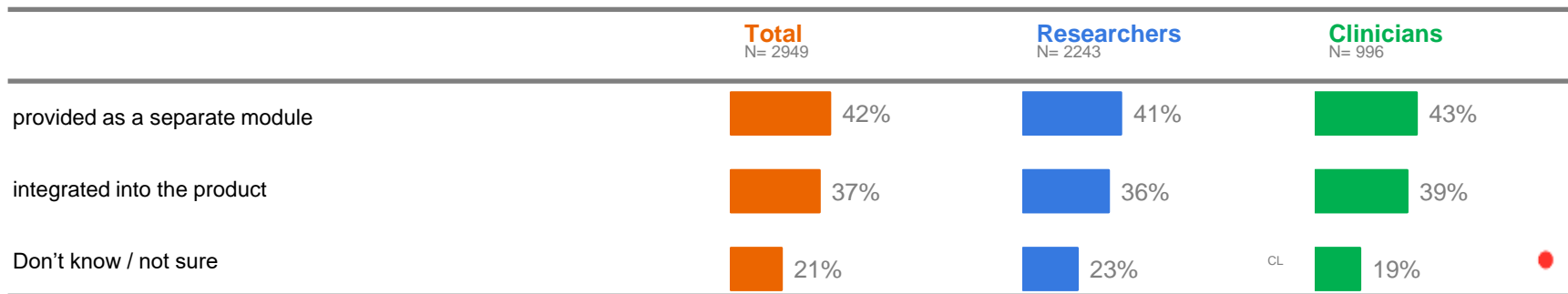
● ● Global

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

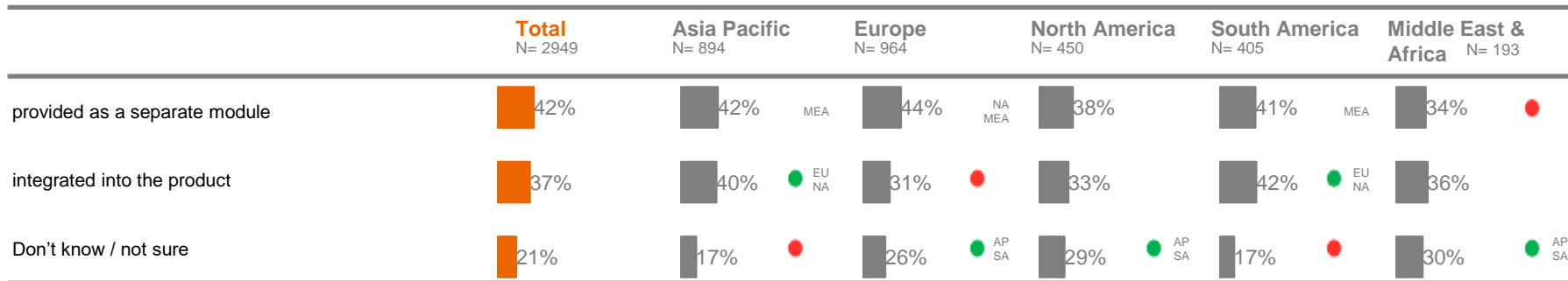
Opinion divided as to whether generative AI should be integrated or kept separate in solutions already used, slightly more would prefer that it is provided as a separate module



# The picture is similar for both researchers and clinicians



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



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

Base: n= 2949

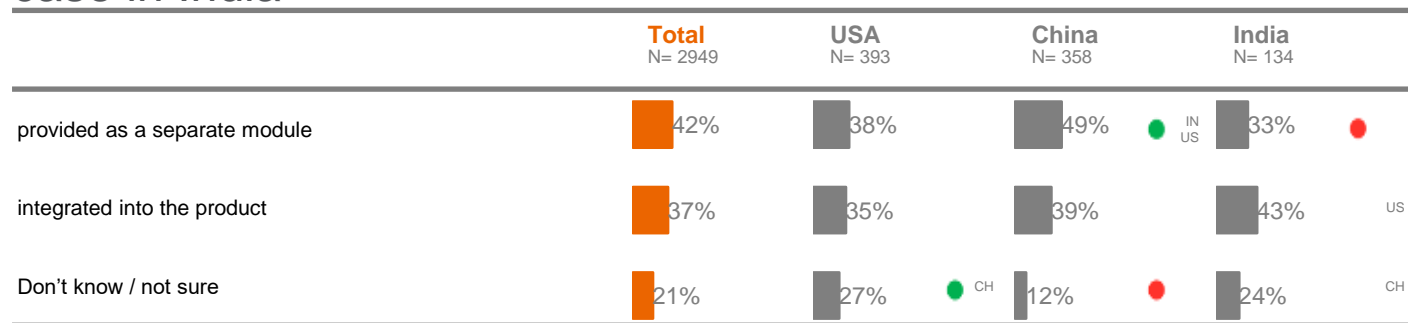
Total



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

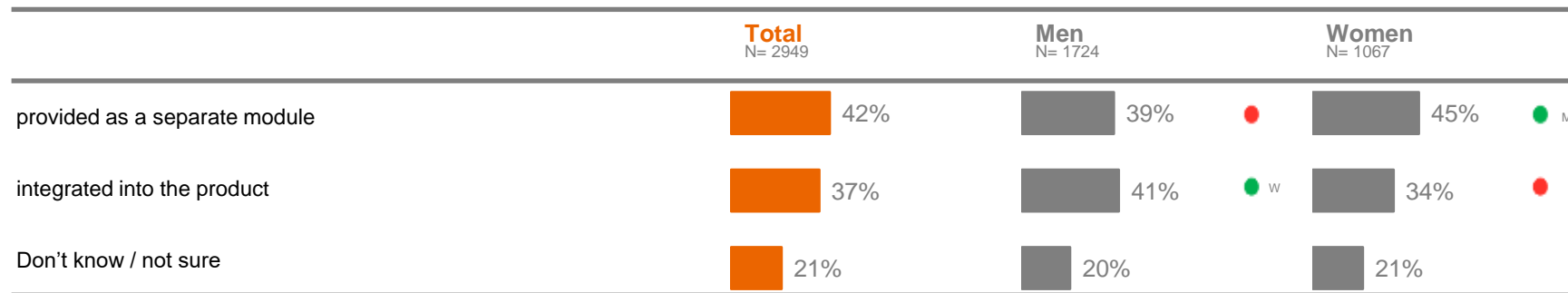
● ● Global  
Role/ Region/ Country (indicated by first two letters e.g. AP = APAC)

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



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

Total



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



Global

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

Select: only one  
Base: n= 2949

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

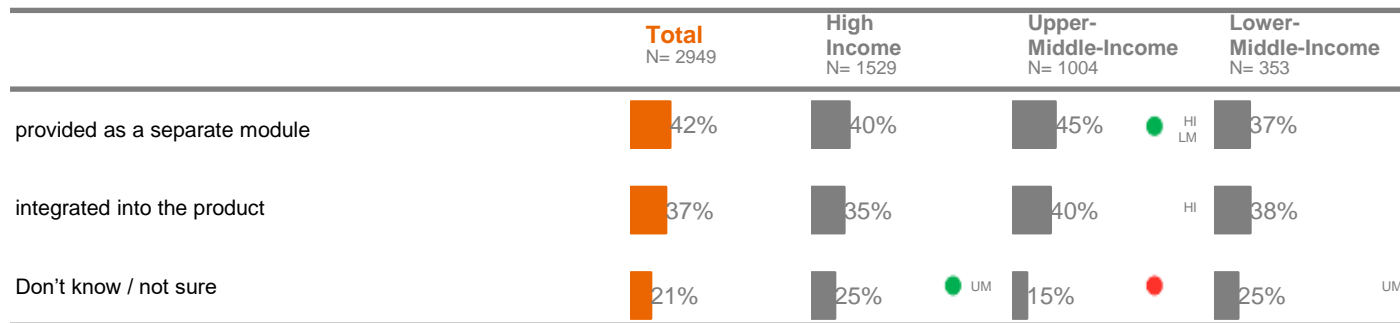
Select: only one  
Base: n=2949


[Back to home](#)

Significantly higher/ lower than...

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

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



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

Total



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



Global

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

Base: n= 2949

## 4. Areas That Would Benefit From AI

# Theme 4

## Areas That Would Benefit From AI

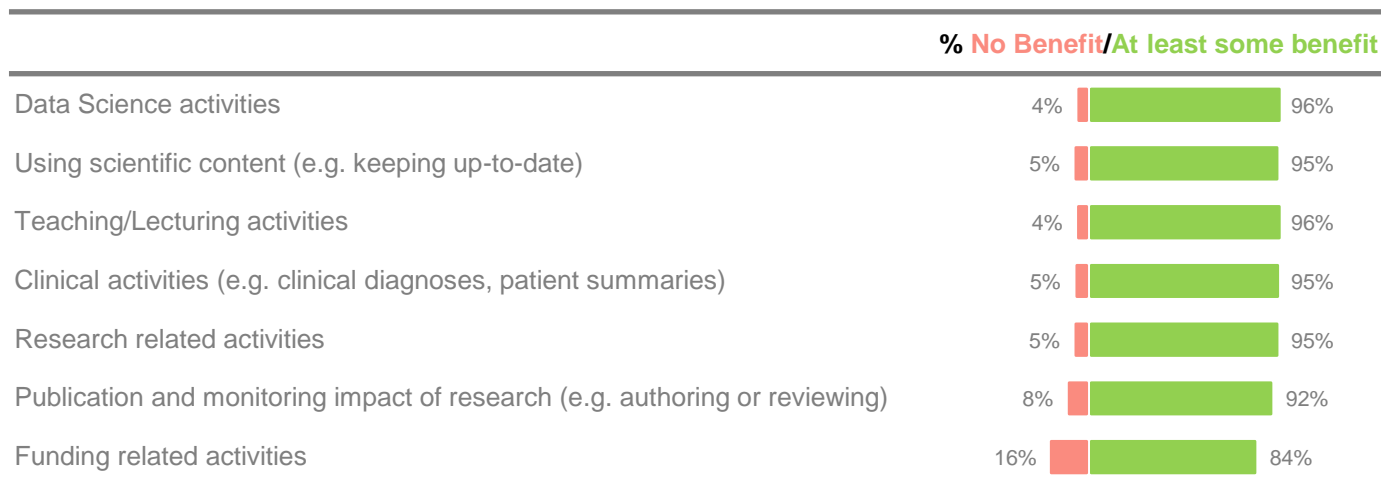
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Thinking about the general areas of activity you need to complete, how much benefit, if any, do you believe the assistance of AI would bring? **Available overall & by persona only**

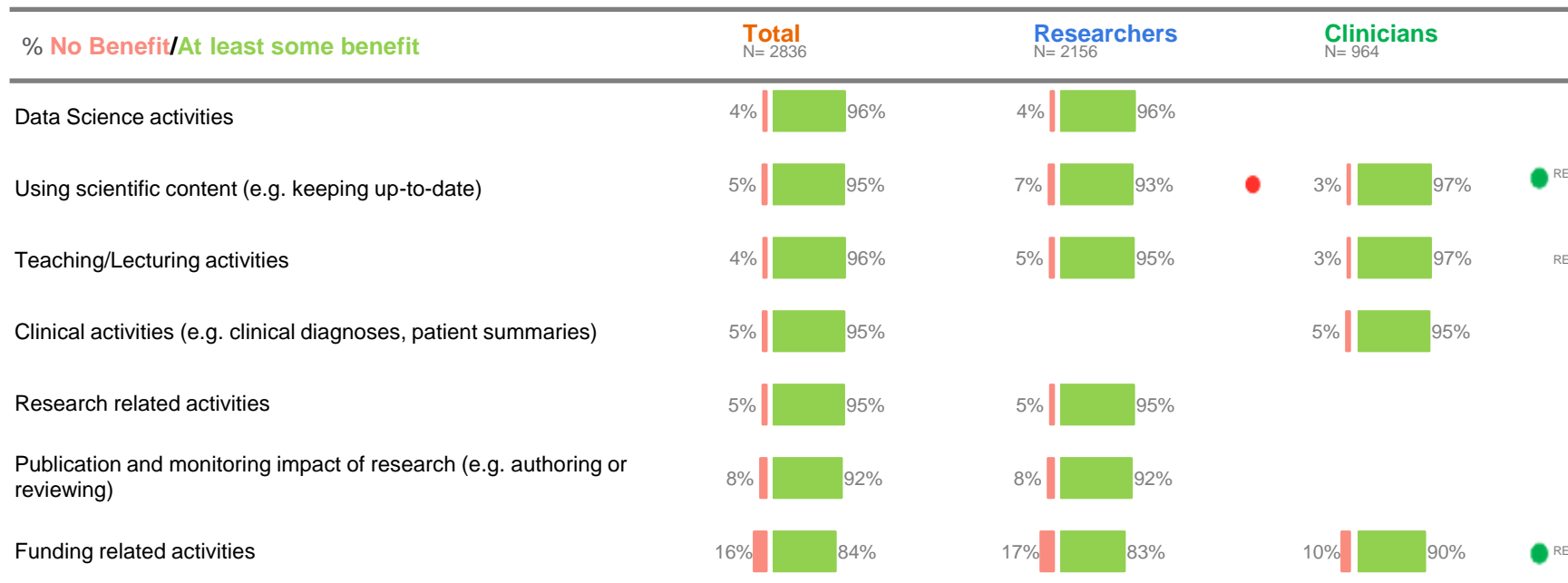
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Slide 158

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



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



Questions: 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?

Scale: A lot of benefit, some benefit, no benefit, don't know/not applicable (bottom box and top two boxes, excl. don't know)

Base: n= 2836

Total

Researchers

Clinicians



## 5. Likelihood To Use an AI Assistant



# Theme 5

## Likelihood To Use an AI Assistant

*If you had a reliable and secure AI assistant to help you... [general activity area]*

*asked to those who see AI benefit to these areas*

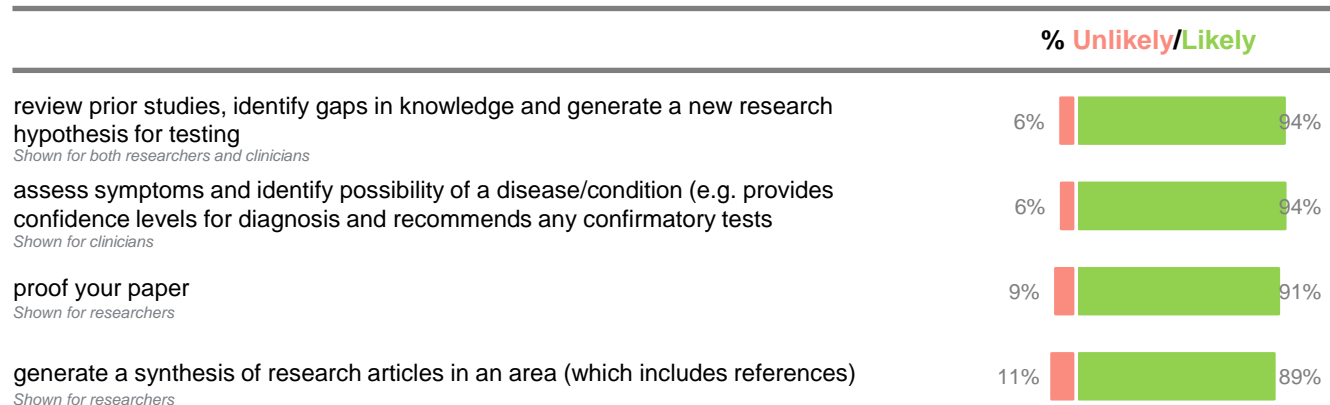
*how likely would you be to use it to...*

**Relevant Persona**

*All only available by persona, region & key market*

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

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

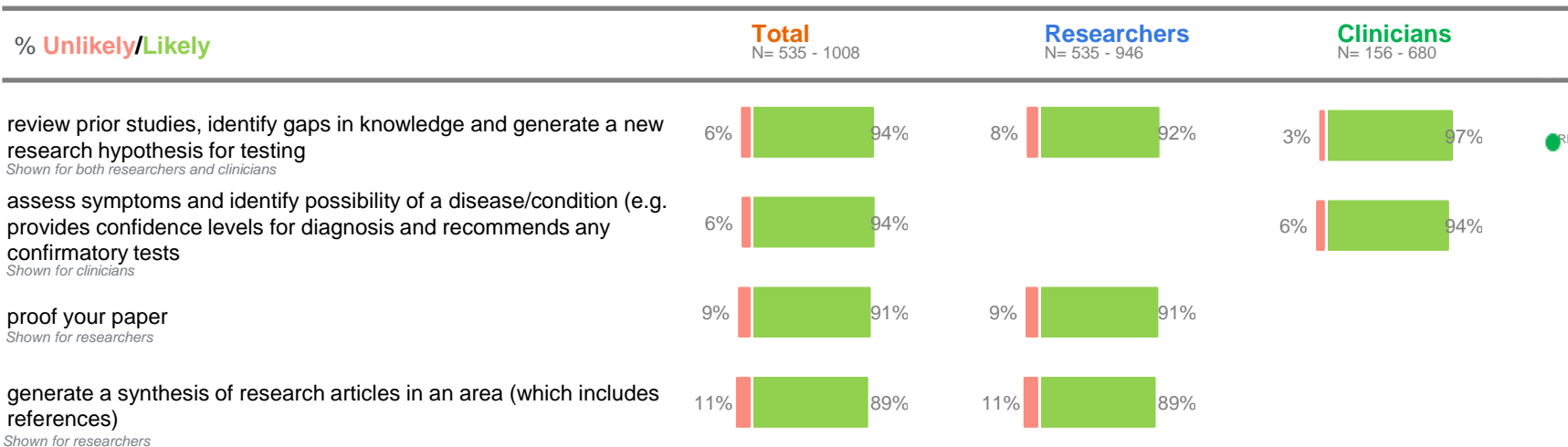


Questions: If you had a reliable and secure AI assistant to help you [general activity area], how likely would you be to use it to...

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)

Base: n= 535 - 1008

# 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 clinicians



Questions: If you had a reliable and secure AI assistant to help you [general activity area], 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)

Total

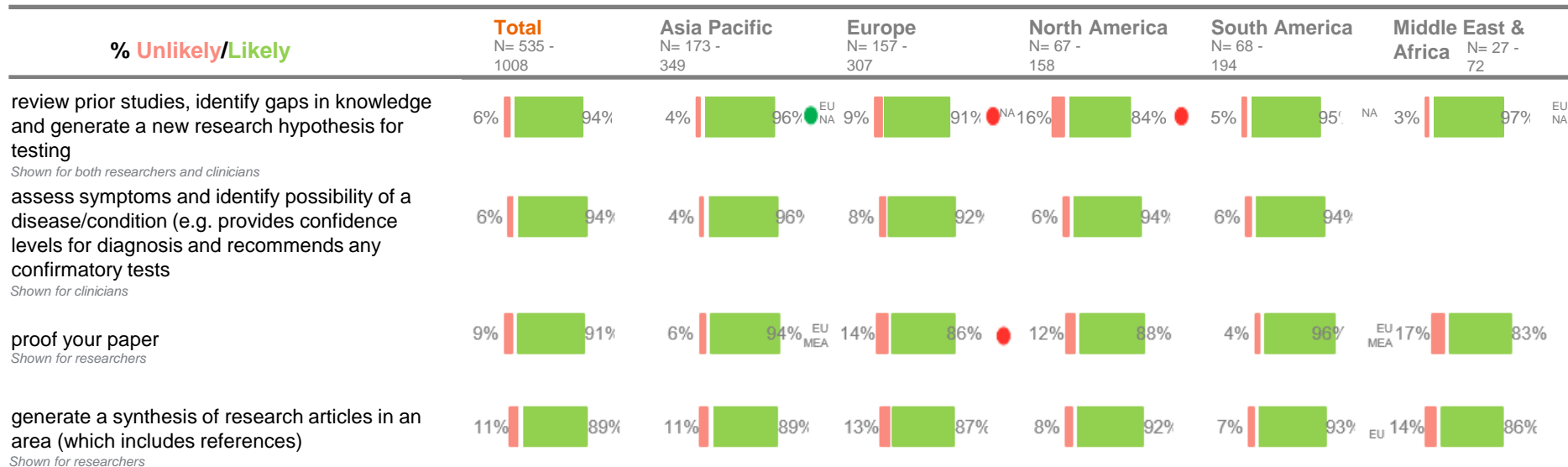
Researchers

Clinicians



Base: n= 535 - 1008

# 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



Questions: If you had a reliable and secure AI 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)

[Total](#)

[Back to home](#)

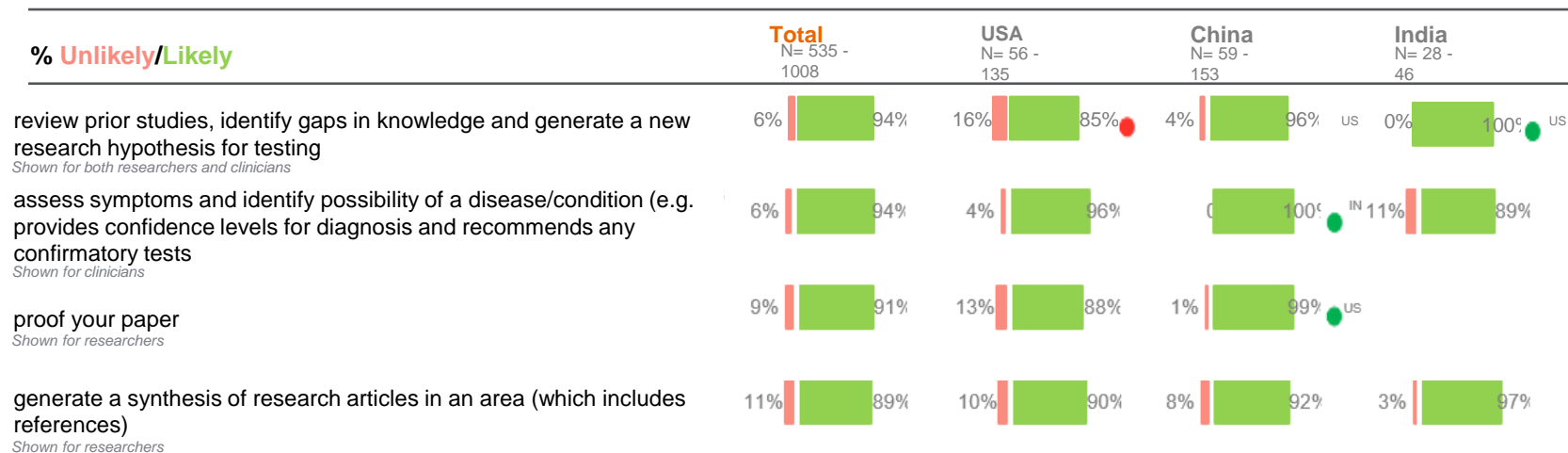
Significantly higher/ lower than...  
Significantly higher than...

● ● Global

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

Base: n= 535 - 1008

# 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



Questions: If you had a reliable and secure AI assistant to help you [general activity area], 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)

● ● Global

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

Base: n= 535 - 1008

Total



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

## 6. AI and Elsevier

# Theme 6

## AI & Elsevier

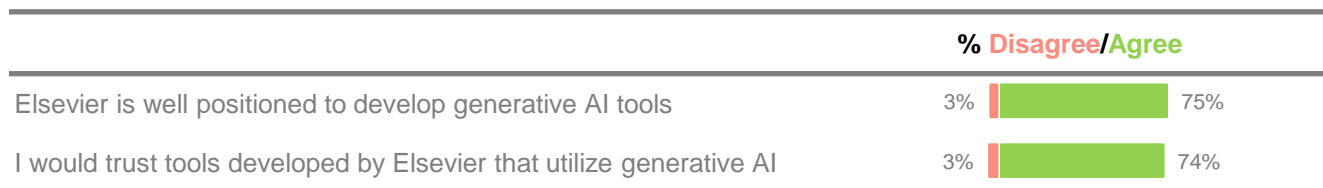
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Thinking about the use of generative AI in your area of work and the role of Elsevier, how much do you agree or disagree with the following?

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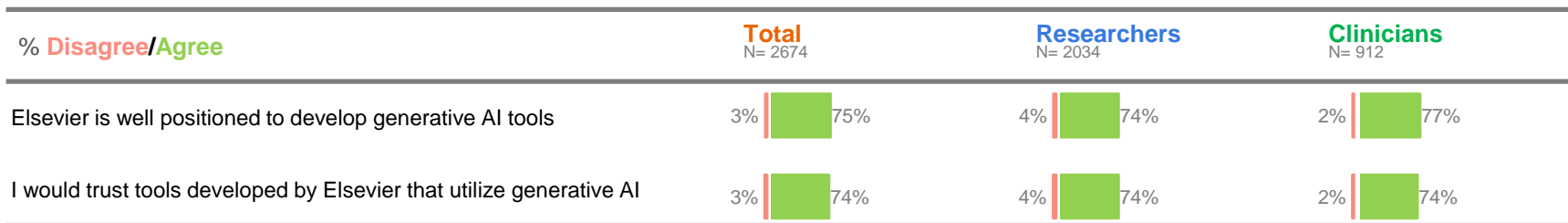
[Slide 168](#)

# Three quarters feel Elsevier is well positioned to develop AI tools

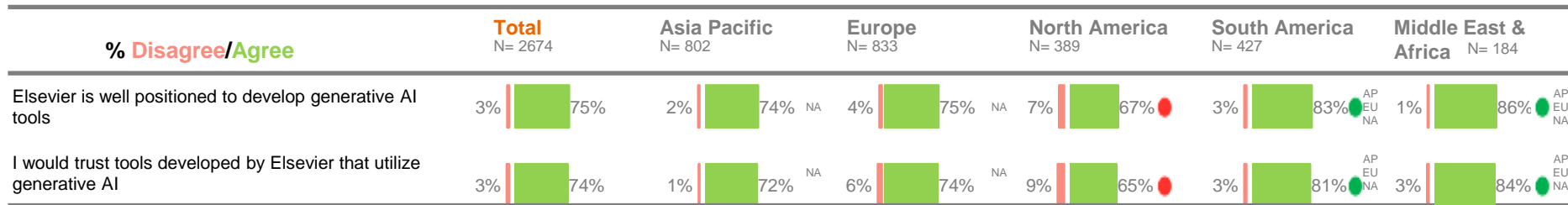




# Three quarters feel Elsevier is well positioned to develop AI tools



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


[Total](#)

[Back to home](#)

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)

Significantly higher/ lower than...

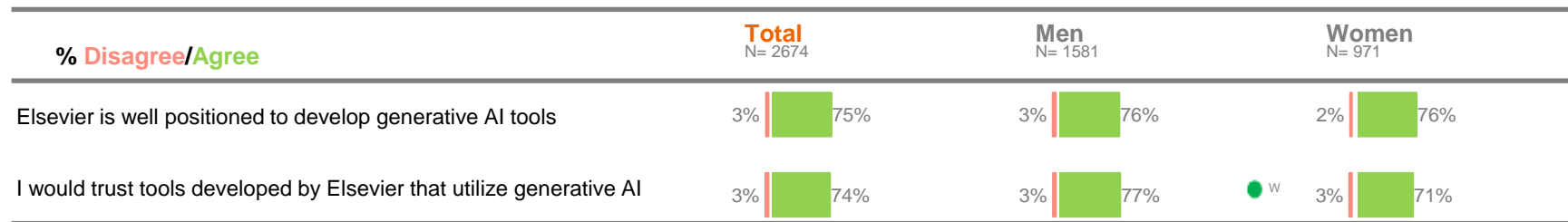
Significantly higher than...

● ● Global

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



Base: n= 2674

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


[Total](#)


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:

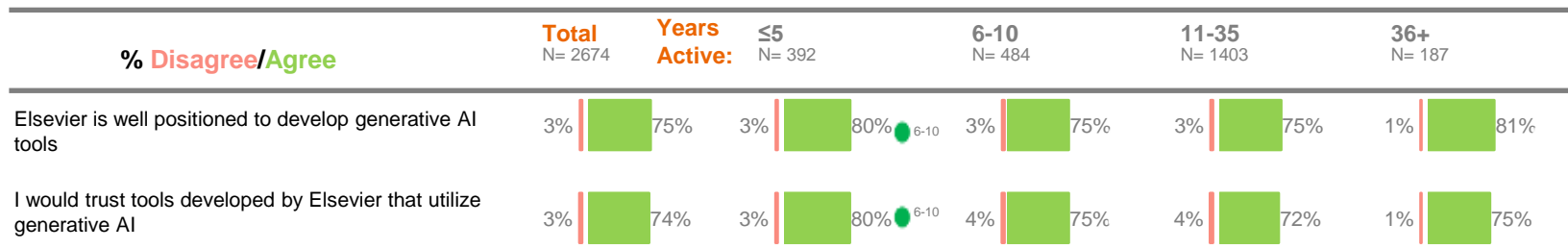
Scale: Strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, strongly disagree, don't know/not applicable (bottom 2 box and top 2 box, excl. don't know)

Significantly higher/ lower than ...   Global

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

Base: n= 2674



# 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


[Total](#)

[Back to home](#)

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)

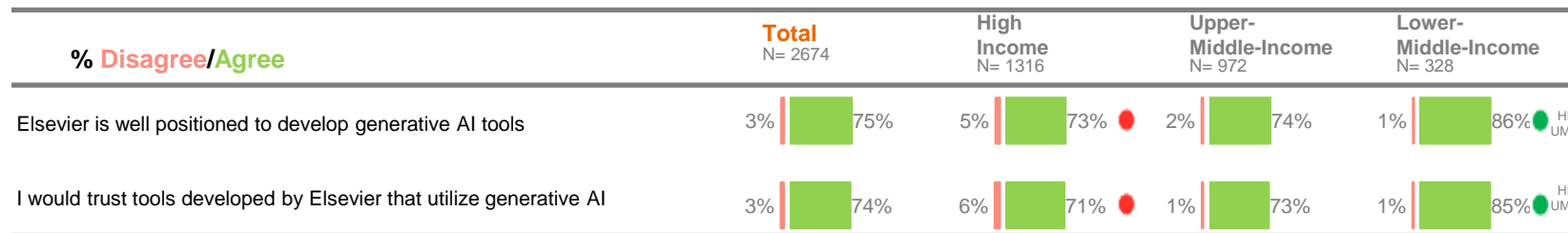
Significantly higher/ lower than...   Global

Significantly higher than...

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

Base: n= 2674

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



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)

Total



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

  Global

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

Base: n= 2674