To: Interested Parties
From: Stephen Clermont, Change Research
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Re: Artificial Intelligence Survey Results

Artificial intelligence (AI) technology holds the promise of creating new ways for Americans to live, work, and play. It can enhance children's learning, improve our health care, and transform American life. Learning from the past, Congress and the Biden Administration have the opportunity to craft regulations that protect Americans and allow companies to innovate. To examine a variety of issues surrounding AI that has just begun to be deployed for wider use, such as Chat GPT, Change Research conducted a survey of 1,326 voters nationally. Voters express interest in this software, have concerns about the impact of its use, and want the federal government to regulate this technology in a smart way. The following highlights key findings:

- **Awareness and use of AI software is at its infancy. Many are not familiar with these products and fewer have used them. However, a majority express interest in learning more.**
    - 50% say they have interest in AI. We define AI as "the ability of computers and machines to carry out decision-making and thought processes similar to humans, sometimes referred to as computers being able to think for themselves." Democrats, Hispanics, nonwhite men, men under 50, college graduates, and those who spend almost all their time at work on a computer express the most interest.

	Interested	Not Interested		Interested	Not Interested
All Voters	50	48	All Voters	50	48
Democrats	60	39	White Women	46	52
Independents	52	45	White Men	52	46
Republicans	39	59	Non White Women	49	49
			Non White Men	60	40
Whites	49	50			
Blacks	47	50	Non College Graduate	44	54
Hispanics	60	40	College Graduate	59	39
18-34 Women	52	45	Time at Work on a Computer		
18-34 Men	68	32			
35-49 Women	44	56	All	65	35
35-49 Men	61	37	Some	51	48
50-64 Women	51	49	Little/None	45	55
50-64 Men	42	57			
65+ Women	41	56			
65+ Men	48	50			

- 38% are familiar with artificial intelligence products – such as ChatGPT – that can have conversations with you and write entire essays based on just a few prompts from humans. Only 7% are very familiar with them. The majority (60%) have little or no familiarity. Young voters are most familiar (54%) and older voters the least (26%).

- Only 17% report using artificial intelligence software like ChatGPT. Younger voters (31% used), those who spend almost all their time at work (36%), and those who believe they could use their job to AI (35%) have used this software the most.

- 50% of voters indicate that they have never heard of Chat GPT. Of those who have, similar shares hold favorable or neutral views (25%) as they do unfavorable ones (25%).

- 35% say they are either using AI in their work or daily life (5%) or are likely to in the next couple of years (30%) while 60% they are not using it and are not likely to. Those who spend all their time at work on a computer (57% using/likely), believe they will lose their job to AI (53%), 18-34 year old men (51%), and non white men (50%) are the likeliest to say they will be using AI soon.

- **Voters think Congress doesn't do a good job of regulating technology, and only slightly more believe that government regulation of business does more good than harm. Voters want effective regulation of AI.**
  - 51% agree that "it's vital for our economic and national security that America develop and deploy artificial intelligence technology to stay ahead of China." Majorities Democrats (53%) and Republicans (51%) agree with this. Nothing better underscores the need for Congress and the Administration to act in a thoughtful and deliberate way as use of AI becomes more widespread.

  - The federal government needs to do much better on regulation of technology and the safe use of it - 22% rate its job on this as "excellent" or "good". Vastly more (71%) rate it as "not so good" or "poor." Majorities of Democrats (57%), Independents (77%), and Republicans (84%) give the federal government negative ratings. This evaluation does not impact the desire for quality regulations. 61% believe the technology industry should be regulated more than it currently is. This includes 76% of Democrats, 58% of Independents, and 47% of Republicans. Only 15% think the industry should be regulated less while 23% find the current level of regulation sufficient.

  - 66% agree more that "the U.S. Congress should create regulations around the safe use of AI that protects jobs, national security, and preventing fraud" while just 18% think that "the U.S. Congress should let entrepreneurs and the people who understand these new technologies build them safely and not stifle the growth of products that could save lives and make our economy stronger." Majorities of

Democrats (82% agree), Independents (60%), and Republicans (51%) believe more in congressional action.

- ○ 73% support the U.S. Congress creating regulations around the safe use of artificial intelligence that protects children online. Just 13% oppose this. Support is high among Democrats (80% support), Independents (71%), and Republicans (67%).
- ○ Overall, voters are more likely to agree that "government regulation of business is necessary to protect the public interest" (50%) than that "government regulation of business usually does more harm than good" (41%).

- **In general, those who have used AI software are significantly more positive about its promise than the vast majority of those who haven't used it yet. AI users see it being a net positive for healthcare, entertainment, terrorism prevention, and their daily lives. Those who haven't used it are negative about all of those things.**
    - ○ Voters express deep concerns about AI's potential negative impact on a variety of industries and professions as well as their own jobs, income, and daily life. Voters are most skeptical about AI's impact on children's education, the U.S. economy, how the government functions, availability of good paying jobs, and its potential use in political campaigns.
    - ○ Voters express concern about the role of AI on virtually all professions, though those who have used it are again more positive. Software engineering and medicine are the areas where there is the most positive sentiment.

Perceived Personal and Industry Impact of AI

	All Voters			Used AI			Not Used AI		
	+	0	-	+	0	-	+	0	-
Health care	41	15	**44**	**51**	14	35	39	15	**46**
Entertainment	35	19	**47**	**47**	13	40	32	20	**48**
Preventing terrorism	30	32	**37**	**34**	33	33	30	33	**38**
Children's education	27	12	**61**	43	11	**46**	24	12	**64**
Preventing crime	27	31	**42**	32	33	**35**	26	31	**43**
The U.S. economy	25	18	**56**	32	20	**48**	24	18	**58**
Your daily life	22	37	**42**	**38**	32	31	18	38	**44**
How the government functions	15	21	**63**	20	30	**50**	14	19	**66**
The availability of good paying jobs in your area	12	28	**60**	16	27	**57**	12	28	**60**
Political campaigns	10	14	**76**	18	15	**67**	8	14	**79**
Your income	8	**49**	43	15	**46**	38	7	**50**	43

- ○ Experience with AI matters on perceptions of its impact on children's education. Those with experience with AI are significantly more positive than those who have not used AI.
- ○ Voters see AI having the most positive impact for computer programmers, doctors, graphic designers, and nurses. Those who have used AI see an overall benefit for

lawyers and farmers and are split on its impact for those in financial services and small business owners. They also are much more positive on the impact for students than those who have not used AI.

Perceived Impact of AI on Professions

	All Voters			Used AI			Not Used AI		
	+	0	-	+	0	-	+	0	-
Computer programmers	**52**	9	39	**56**	9	36	**51**	10	40
Doctors	40	19	**41**	**49**	19	31	38	19	**43**
Graphic designers	39	12	**49**	34	10	56	40	12	**47**
Nurses	35	24	**40**	38	27	**35**	34	24	**42**
Financial services	33	21	**46**	38	23	**39**	31	22	**47**
Students	31	10	**59**	43	9	**48**	29	10	**61**
Lawyers	28	32	**39**	**38**	33	28	26	32	**42**
Small business owners	28	24	**48**	36	24	**39**	26	24	**50**
Teachers	27	13	**59**	38	13	**49**	24	14	**62**
Writers	26	18	**56**	30	17	**53**	24	18	**57**
Farmers	26	37	**36**	34	**40**	27	24	37	**39**
Government employees	21	27	**52**	25	37	**39**	19	25	**55**
Your job	18	**47**	34	31	33	**36**	14	**52**	34
Factory workers	16	21	**63**	13	28	**60**	16	20	**64**

○ Just 18% of those employed see a positive impact of AI on their job while 34% see a negative one. Those who spend all their time at work on a computer are more likely to see a positive impact (27% positive, 37% negative, 36% none) than those who spend some (15% positive, 41% negative, 44% none) or little to no time on a computer (10% positive impact, 20% negative, 70% none).

○ 22% believe they could lose their job because of AI. Those who spend all (26%) or some (25%) of their time on a computer at work are more worried about losing their job than those who spend little or no time (12%).

○ Voters do not believe that AI will be able to provide the same level of quality of service as a human being (7% it will, 81% it will not, 11% not sure) and that AI will be able to provide the same quality of entertainment as content produced by human beings (15% it will, 71% it will not, 14% not sure).

● **42% of voters were confident they could tell the difference between AI-generated content and human-generated, but in our tests, they did no better than a coin flip.**

○ When we asked voters to differentiate between statements promoting AI that were written by us and by AI, most respondents threw up their hands and were unable to tell the difference.

○ 88% express concern with the ability for people to use artificial intelligence to make it seem like elected officials, government officials, and others are saying things they are not saying.

- People have equal levels of concern about being misled by AI and being misled by politicians. As many people (44%) are as worried about people using artificial intelligence to create fake videos of candidates and elected officials (43%) as they are about candidates and elected officials saying things that are not true and you not being able to tell what is true and what is not (44%).

- We asked people to watch a short video that people created and put on YouTube that had President Biden saying ridiculous things during his most recent state of the union (https://youtu.be/8QcbRM0Zq_c). More people found this video more concerning than amusing (45%) than the other way around (28%).

- 53% think that AI will be designed in a way that will be politically biased. Overall, 34% believe that AI will be biased towards liberals as opposed to 19% who think it will be biased towards conservatives. Only 8% reject the idea that AI will be biased ideologically while 38% are not sure. Republicans are far more concerned about liberal bias than Democrats are about conservative bias.

All	Dem	Ind	GOP	
34	7	29	**64**	Biased towards liberals
19	25	14	14	Biased towards conservatives
8	12	9	3	No bias
38	**55**	**48**	18	Not sure

- **In assessing different companies and services, voters view Google, Amazon, and Microsoft favorably, in stark contrast to voters' skepticism about social media companies.**

  - The plurality (39%) of voters believe that technology and the technology industry have made the quality of life in the country better. However, 34% believe it has made the quality of life worse, and 28% believe it has made no difference. On balance, Democrats believe it has made life better (50% better, 22% worse, 28% same) while Republicans say it has made life worse (28% better, 47% worse, 25% same). Independents split equally among the three options given (33% better, 34% worse, 34% same).

	Favorable	Neutral	Unfavorable
Google	**45**	25	30
Amazon	**45**	23	32
Microsoft	**40**	35	25
Spotify	**30**	47	16
Apple	29	31	**39**
Facebook	29	22	**49**
Instagram	23	40	**36**
Twitter	18	27	**54**
TikTok	11	20	**68**

  - 14% of voters would feel safe on roads with self-driving cars and trucks while 74% would feel unsafe..

- Many voters view corporations' motivations negatively. When asked which better reflected their view of corporations' efforts to develop and deploy AI as more of an effort to eliminate jobs (61%) than creating tools to better serve their customers (20%).
- Given voters' concerns over AI and potential harms, it will be paramount for its creators and supporters to be upfront about the tradeoffs, show concrete benefits, and speak to its potential in a way that embraces humanity. Joking by saying things like "AI will probably most likely lead to the end of the world, but in the meantime, there'll be great companies" will be especially harmful as 54% would view someone saying something like this unfavorably.

In summary, we asked Chat GPT to create a summary of the concerns about the use of AI. Here is the result:

"As we continue to embrace Artificial intelligence in more areas of our lives, it is important to be aware of the potential risks and drawbacks. Unregulated use of AI could lead to job displacement, biases and discrimination, and privacy concerns. Additionally, AI may not always be able to make ethical decisions or understand human values. We must proceed with caution and develop robust regulations to ensure that AI is used safely, ethically, and for the benefit of all."

85% agree with this statement. Change Research will continue to release research on this important topic throughout the year as AI software gets adopted to wider use. If you have any comments or would like to talk about this further, please contact Nicole Bare, CEO of Change Research, at nicole@changeresearch.com.