9

Public Opinion

Overview

Public views of AI are now shaped by a central tension, as optimism about the technology's benefits often coexists with anxiety about its broader effects. Majorities in most countries say AI's benefits outweigh its drawbacks, but nervousness is growing and trust in institutions to manage the technology remains uneven. AI experts and the general public view the technology's trajectory very differently, with wide gaps on employment, the economy, and healthcare. Southeast Asian countries are consistently the most optimistic and most trusting of their own governments to regulate AI, while North America and Europe report lower expectations and greater skepticism. This chapter tracks these patterns across 30-plus countries, drawing on several large-scale surveys conducted between 2024 and 2026 from Ipsos AI Monitor, Pew Research Center, the University of Melbourne/KPMG Global AI Survey, CHIP50 survey, the LEAP Survey and Elon University's Human Capacities survey.

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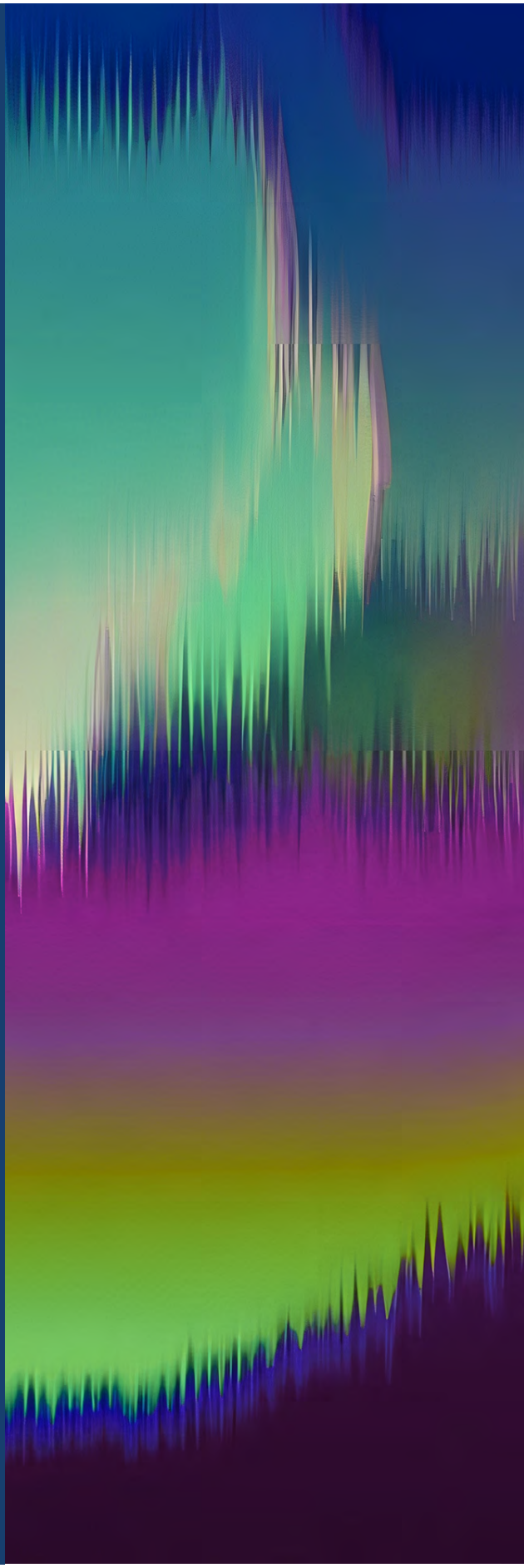
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Chapter Highlights

1. **AI optimism is rising, but so is anxiety.** Globally, the share of respondents who say AI products and services offer more benefits than drawbacks rose from 55% in 2024 to 59% in 2025, even as the share saying these products make them nervous increased to 52%.

2. **Southeast Asian countries remain among the world's most optimistic about AI.** In Malaysia, Thailand, Indonesia, and Singapore, more than 80% of respondents say AI will profoundly change their lives in the next 3-5 years, with Malaysia posting the largest increase from 2024.

3. **India saw the sharpest rise in AI nervousness of any country surveyed.** Between 2024 and 2025, India registered the sharpest rise in concern around AI usage (+14 percentage points) with only a modest increase in excitement (+2).

4. **Workplace AI usage is higher in several emerging economies than in many advanced ones.** In 2025, 58% of employees globally reported using AI at work on a semiregular or regular basis, but in India, China, Nigeria, the United Arab Emirates, and Saudi Arabia, the share exceeded 80%.

5. **AI experts and the U.S. public have very different perspectives on AI's future, except on elections and personal relationships.** On how people do their jobs, 73% of experts expect a positive impact, compared to just 23% of the public, a 50-point gap. Similar divides appear for the economy (69% vs. 21%) and medical care (84% vs. 44%).

6. **Nearly two-thirds of Americans (64%) expect AI to lead to fewer jobs over the next 20 years, while only 5% expect more.** Experts were less pessimistic (39% fewer, 19% more) but forecast far faster adoption, expecting generative AI to assist 18% of U.S. work hours by 2030 versus the public's estimate of 10%.

7. **AI companionship is still niche, and global views vary widely.** More than half of respondents worldwide (52%) reported some excitement about using AI for companionship, compared with just 42% in the United States. Experts forecast that 10% of U.S. adults will use an AI companion daily by 2027, rising to 30% by 2040.

8. **The United States reported the lowest trust in its own government to regulate AI responsibly of any country surveyed, at 31%.** The global average was 54%, with Southeast Asian countries leading (Singapore 81%, Indonesia 76%).

9. **Across all 50 U.S. states, concern about too little AI regulation outweighs concern about too much.** Nationally, 41% of respondents said federal AI regulation will not go far enough, compared with 27% who said it will go too far, though more than one-third were unsure.

10. **Globally, the EU is trusted more than the United States or China to regulate AI effectively.** Across 25 countries in Pew's 2025 survey, a median of 53% said they trust the EU, compared to 37% for the United States and 27% for China.

9.1 Global Sentiment Toward AI

This section explores global differences in opinions and perceptions of AI. Since 2022, Ipsos has conducted its annual AI Monitor survey to track public attitudes and perceptions of artificial intelligence worldwide. The set of participating countries has changed over time.[1] The 2025 survey was conducted last year from March 21 to April 4 and covered 30 countries, with a sample size of 23,216 adults.

There are some modest shifts over the years in respondents' opinions, though self-reported AI literacy remains consistent (Figure 9.1.1). Over half of all respondents reported having a good understanding of what AI is and which products and services to use. Over the last year, nervousness has also increased, with the proportion of people who say AI products make them nervous rising by 2 percentage points, to 52%. In tandem, more respondents expressed optimism that the benefits outweigh the drawbacks of AI-enabled products and services, up to 59% from 55% in 2024.

Global opinions on products and services using AI (% of total), 2022–25

Source: Ipsos, 2022–25 | Chart: 2026 AI Index report

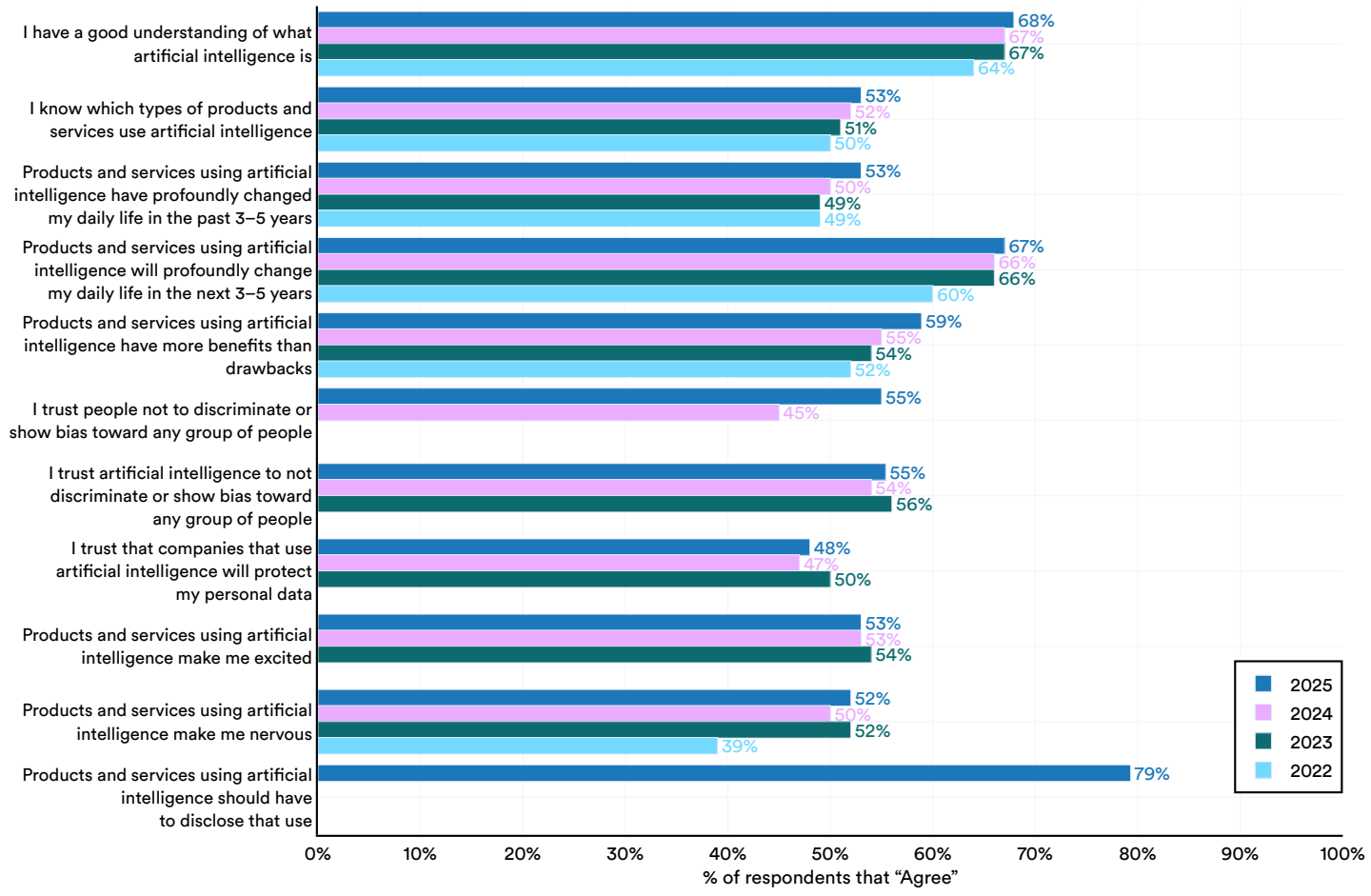


Figure 9.1.1

1 Data for China for the year 2025 was provided by Ipsos but may not appear in their published reports.

The increase in optimism is not uniform across all surveyed countries (Figure 9.1.2). From the 30 countries surveyed by Ipsos, many reported increases between 2022 and 2025 in survey respondents who agreed that the benefits of AI outweigh the drawbacks. Several European countries, in particular, report higher levels of optimism over this period, including Germany (+12 percentage points), France (+10), China (+9), and Great Britain (+5), though their overall sentiment remained lower than in parts of Asia and Latin America.

'Products and services using AI have more benefits than drawbacks,' by country (% of total), 2022–25

Source: Ipsos, 2022–25 | Chart: 2026 AI Index report

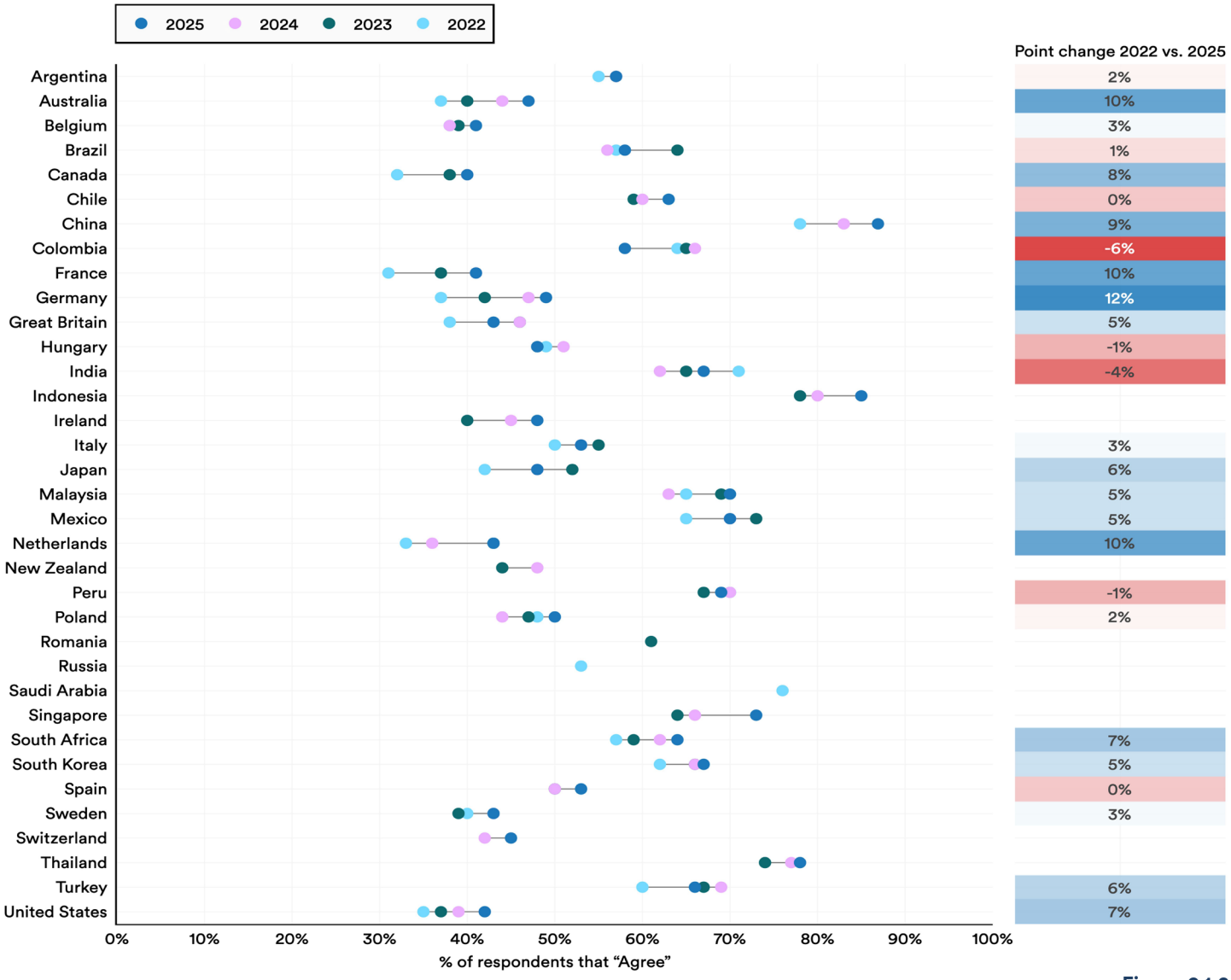


Figure 9.1.2

Southeast Asian nations are among the most optimistic about the future of AI (Figure 9.1.3). In Malaysia, Thailand, Indonesia, and Singapore, over 80% of respondents expect AI to profoundly change their lives over the next three to five years. These countries have consistently ranked at the top of global optimism on AI in recent years, and that sentiment has edged up since 2024, with Malaysia showing the largest increase (+9) (Figure 9.1.4). Respondents from these countries also report higher levels of excitement than nervousness about AI-enabled products and services.

Opinions about AI by country (% agreeing with statement), 2025

Source: Ipsos, 2025 | Chart: 2026 AI Index report

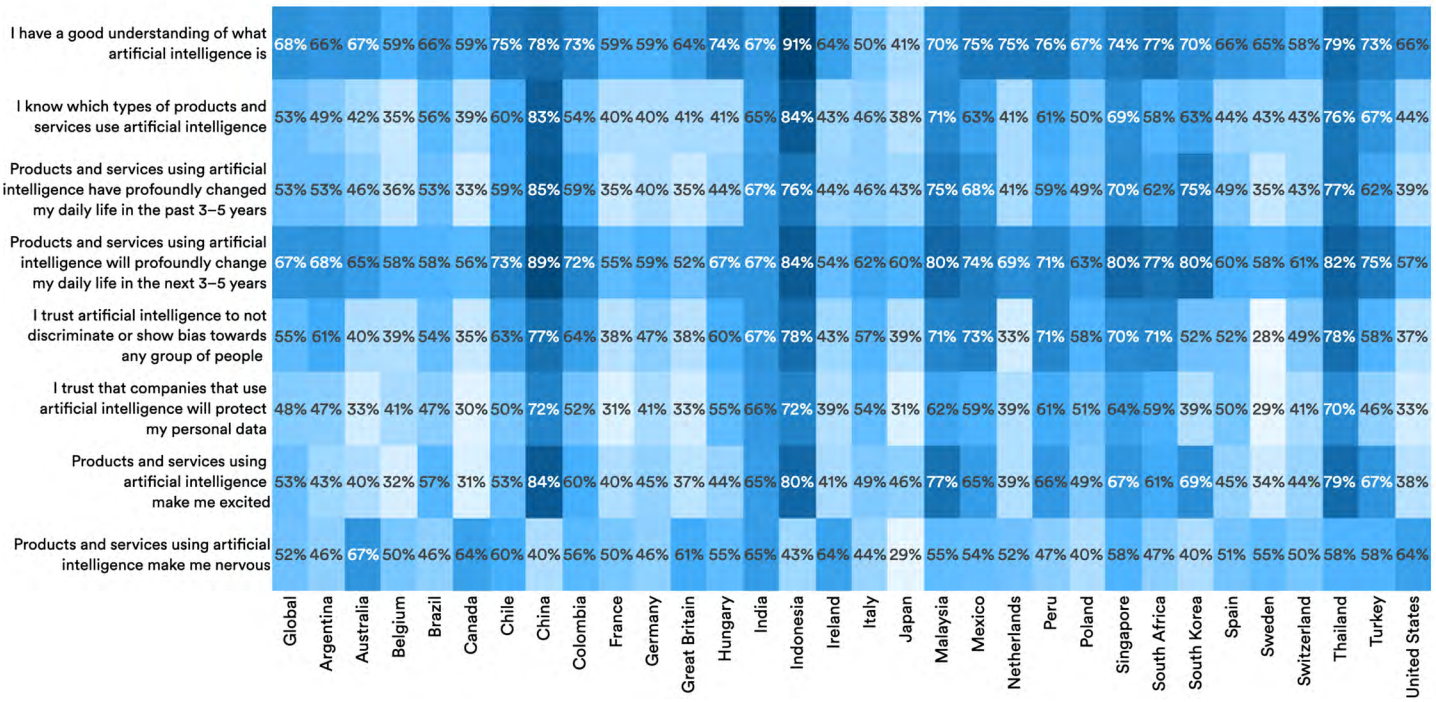


Figure 9.1.3

When looking at year-over-year percentage point changes, global nervousness has increased (+3) and excitement declined (-1) relative to 2024. India shows the sharpest increase in concern around AI usage (+14) with only a modest increase in excitement (+2).

Percentage point change in opinions about AI by country (% agreeing with statement), 2024–25

Source: Ipsos, 2024–25 | Chart: 2026 AI Index report

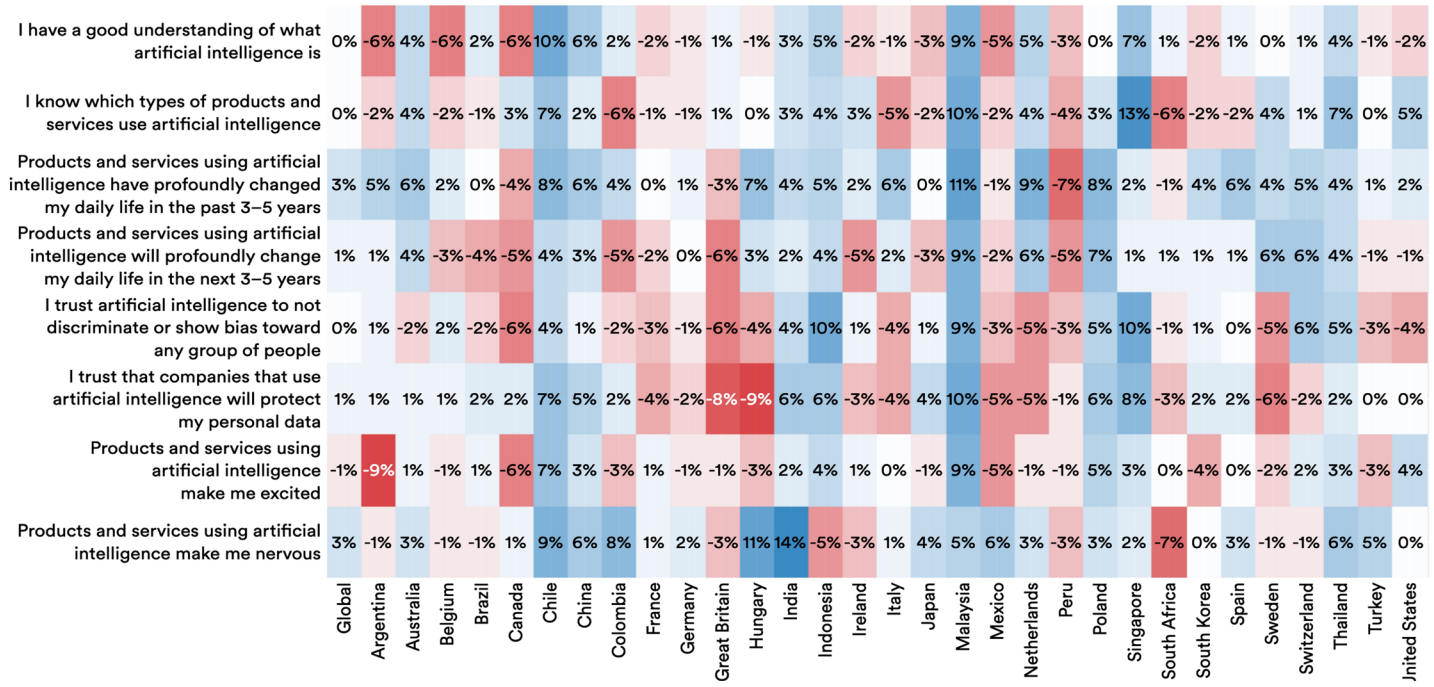


Figure 9.1.4

Across countries, excitement and nervousness about AI do not align closely (Figure 9.1.5). The 2025 distribution mirrors patterns from prior years, with North American and European countries generally clustered at lower levels of excitement and higher levels of nervousness. China and Indonesia show the highest levels of excitement, with nervousness below 50%.

Global opinions about products and services using AI by country, 2025

Source: Ipsos, 2025 | Chart: 2026 AI Index report

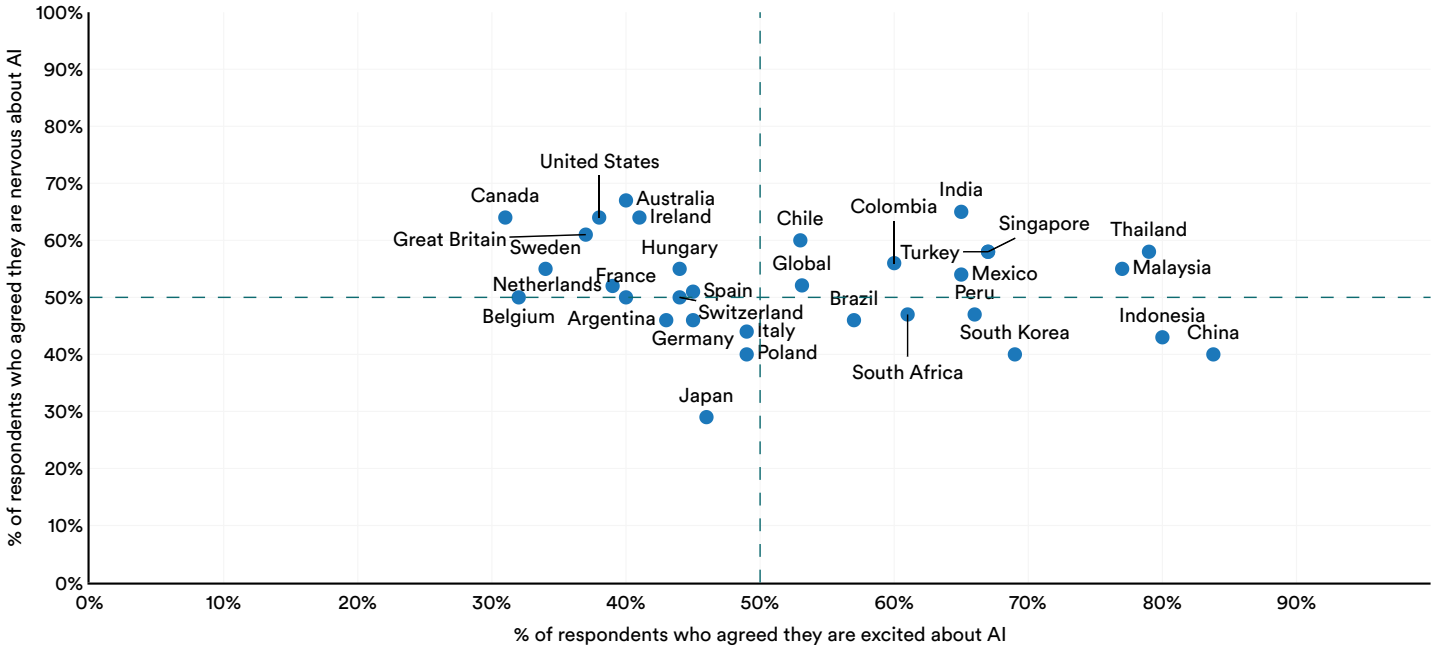


Figure 9.1.5



Despite increased nervousness, many respondents continue to associate AI with practical personal benefits, particularly time savings and entertainment (Figure 9.1.6). Globally, 56% of respondents believed AI would reduce the amount of time it takes them to get things done; this figure was even higher in China (78%) and in Southeast Asian countries (>60%). However, respondents were less sure about AI's potential to positively impact their country's economy or job market. North American and European respondents were more skeptical that AI would make their jobs better. In the United States, 33% of respondents said AI would make their jobs better, as opposed to making them worse or having no impact, compared to the global average of 40%. Positive views of AI's personal benefits appear to coexist with concern about its effects on labor markets.

Global opinions on the potential of AI to improve life by country, 2025
Source: Ipsos, 2025 | Chart: 2026 AI Index report

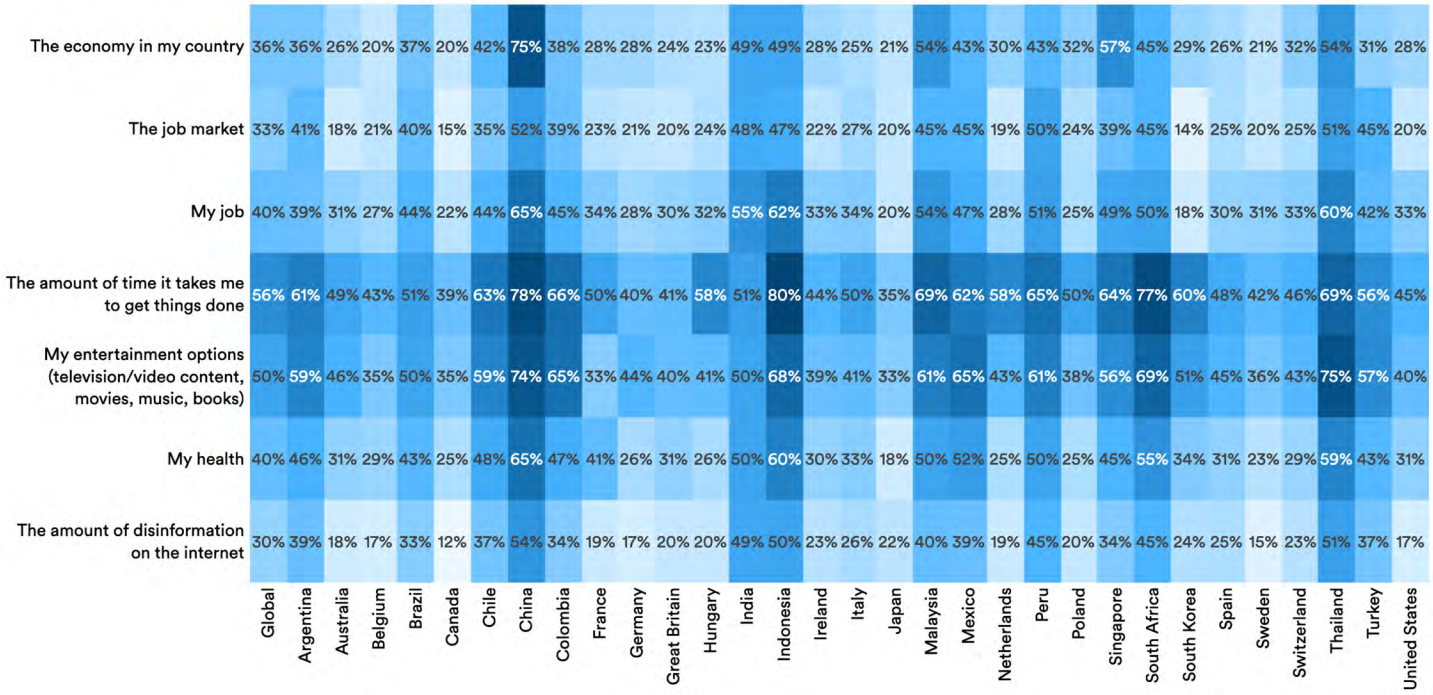


Figure 9.1.6

Global Perceptions of AI's Impact on Jobs

In both 2024 and 2025, Ipsos asked respondents how likely they thought it was that AI would change their job or completely replace it within the next five years. Results from 2025 show that perceptions remained stable year over year (Figure 9.1.7). In 2025, 22% of respondents said it was "very likely" AI would change how they do their current job, compared to 21% in 2024. In both years, the share that said it was "not likely" remained unchanged at 32%. Expectations around job replacement showed the same consistency. In 2024 and 2025, 11% of respondents reported that it was "very likely" AI would replace their job within the next five years, and 56% said this was "not likely".

When asked whether AI is generally more likely to create new jobs or eliminate existing ones, views in 2025 were divided (Figure 9.1.8). Country-level expectations follow similar patterns to the earlier sentiment trends. Nigeria, Japan, Mexico, the United Arab Emirates, South Korea, and India all expected AI to create more jobs than it eliminates, with shares above 60%. The United States and Canada sat at the opposite end, where 67% and 68% of respondents expected AI to eliminate jobs and disrupt industries.

Global opinions on the perceived impact of AI on current jobs, 2024 vs. 2025

Source: Ipsos, 2025 | Chart: 2026 AI Index report

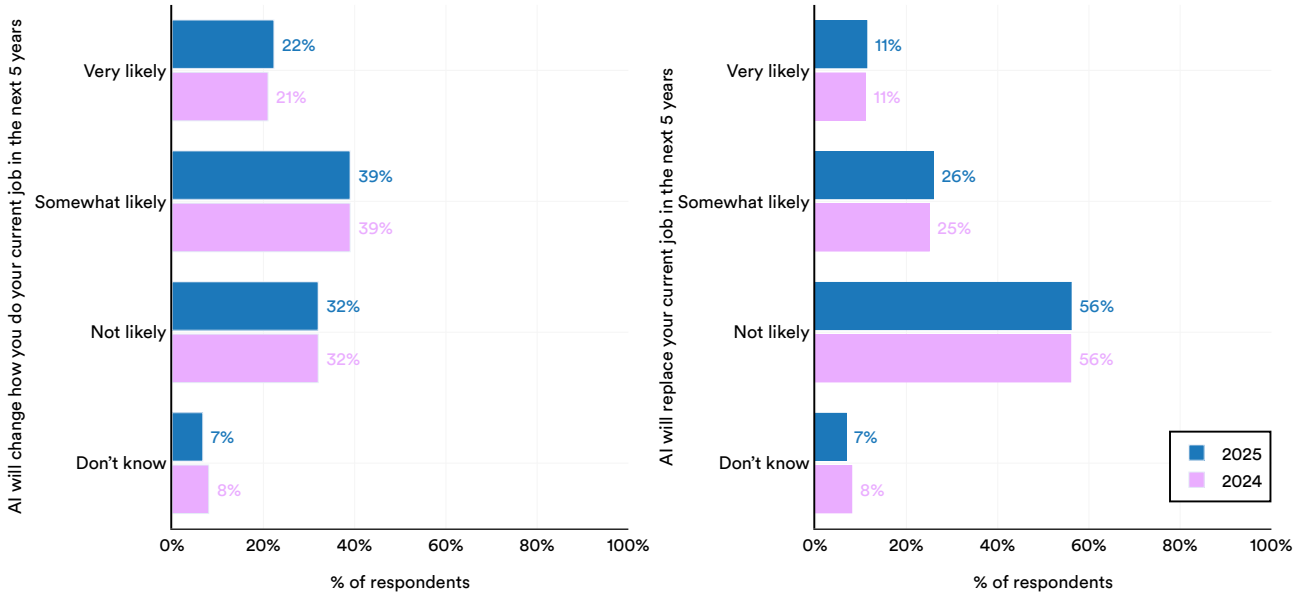


Figure 9.1.7

Global expectations about AI creating new jobs vs. eliminating jobs, 2025

Source: Ipsos, Google 2026 | Chart: 2026 AI Index report

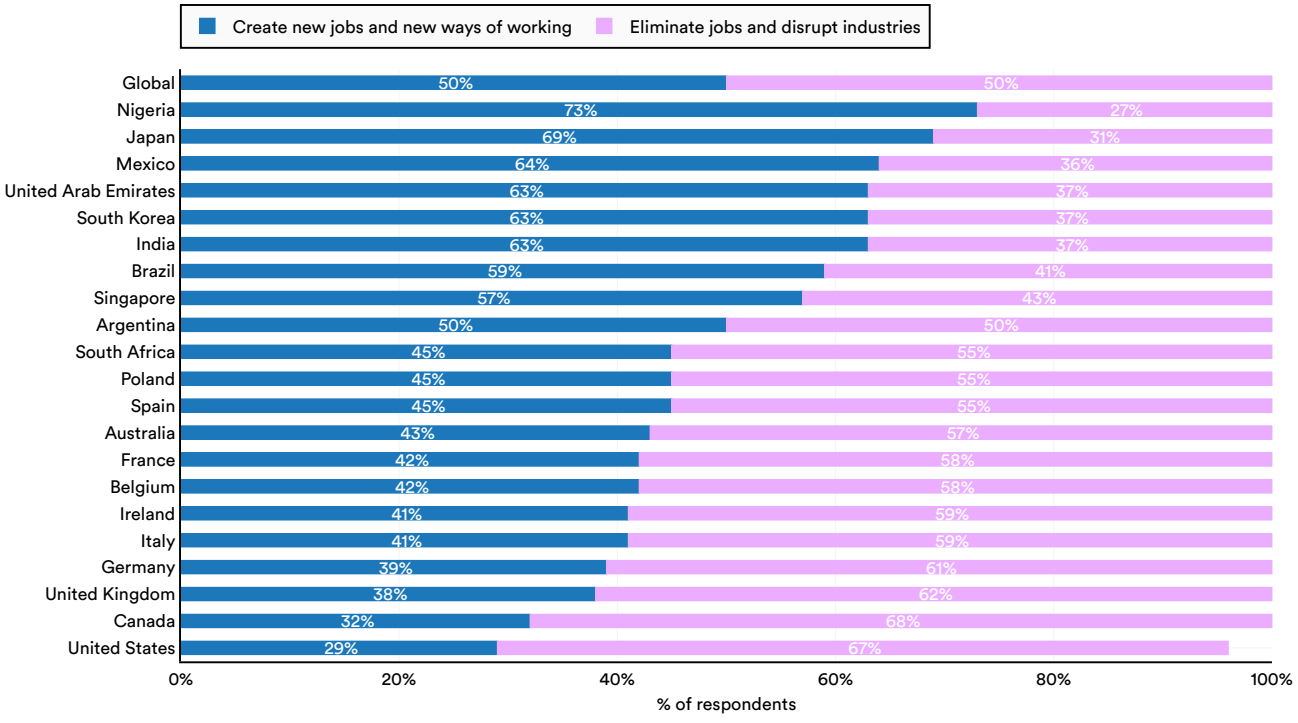


Figure 9.1.8[2]

2 In Ipsos' reporting of findings, percentage points are rounded to the nearest whole number. As a result, figures may not add up to exactly 100%.

Respondents were also asked whether AI would make the job market and their own jobs better, worse, or stay the same over the next five years. Optimism on both measures is low, under or around 50%, in most countries surveyed (Figure 9.1.9). China, Indonesia, Thailand, and Singapore report more positive expectations around AI's impact on jobs, both individually and economy-wide. North America and Europe have lower expectations, though respondents there were more positive about how AI might improve their individual jobs compared to the overall job market. Chapter 4 of the AI Index further explores the technology's impact on the global economy and labor markets.



Global opinion on the potential of AI to improve the job market vs. individual jobs, 2025

Source: Ipsos, 2025 | Chart: 2026 AI Index report

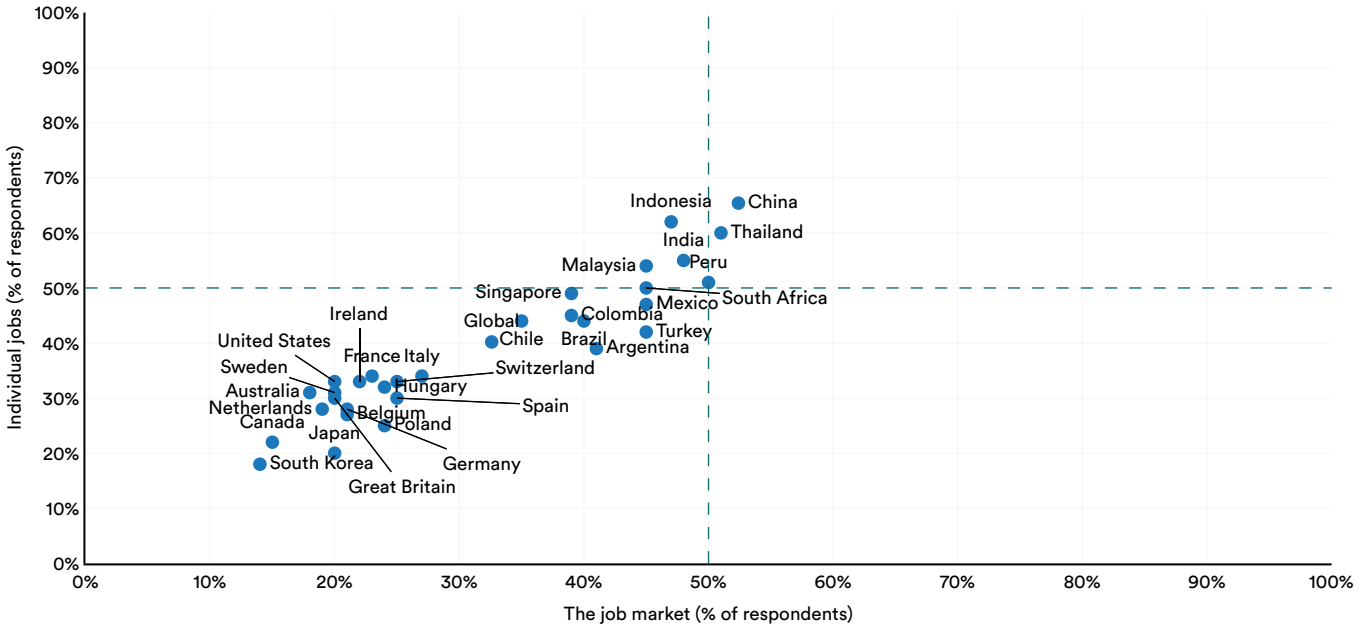


Figure 9.1.9

HIGHLIGHT:

Global AI Use in the Workplace

Since 2022, the use of AI technology within organizations has become more prevalent. To capture that transformation across workplaces, the University of Melbourne fielded a global survey[3] of 48,340 people across 47 countries, examining how employees are adopting and using AI at work. Respondents were asked if they rely on AI to inform decisions, and whether they feel comfortable sharing the information AI tools need to carry out tasks.

Globally, the share of employees who intentionally use AI at work continues to grow. In 2025, 58% of employees reported using AI on a semiregular or regular basis, and just over half (53%) said they trust AI for work purposes (Figure 9.1.10). From a regional perspective, the results reveal notable differences. Employees in emerging economies remain the most active users of AI in the workplace: In India, China, Nigeria, the United Arab Emirates, and Saudi Arabia, over 80% of respondents said they regularly use AI at work, and trust levels in these countries are similarly high. By contrast, in most North American and European countries, about half of employees report using AI tools regularly, while trust tends to fall several points lower, between 40% and 48%. The regional patterns in workplace adoption contrast with the population-level diffusion data discussed in Chapter 4, where AI adoption shows a strong, statistically significant positive correlation with GDP per capita.

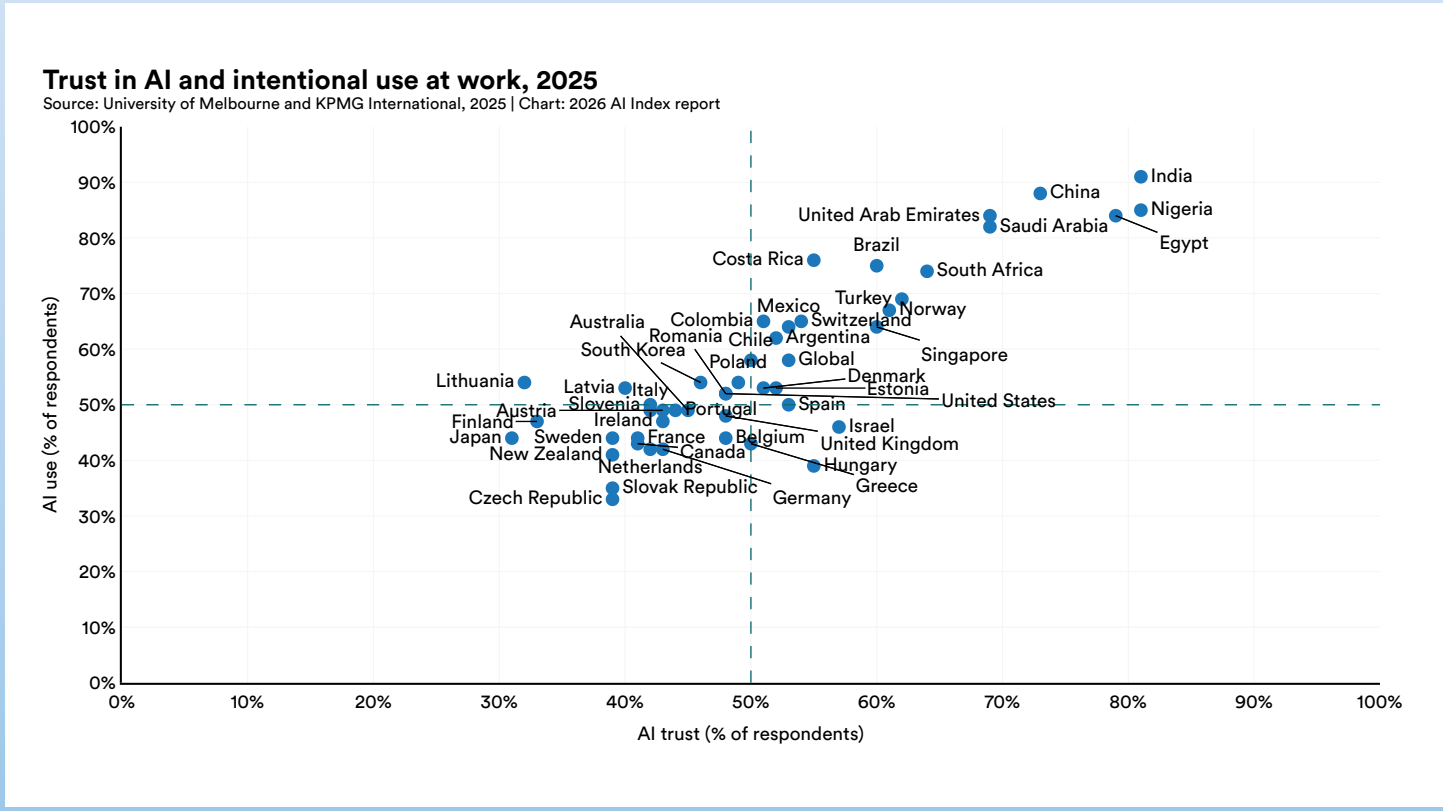


Figure 9.1.10

This section draws on multiple U.S.-focused surveys to compare how the public and AI experts view AI's

3 These results come from an online survey, which can overrepresent younger, more urban, and more educated respondents in emerging economies. The study authors note that country-level differences hold after controlling for age and education.

HIGHLIGHT:

The survey also asked employees about their organization's level of support for AI strategy, AI literacy, and AI governance (Figure 9.1.11). Respondents reflected on whether their organization had a coherent AI strategy and supported adoption, AI literacy, and responsible use, including training, as well as governance practices such as clear policies, monitoring, accountability, and data privacy and security measures.

Consistent with usage and trust levels, organizational support was reported highest in emerging economies. In India, around 85%–90% of respondents said their organization supports AI strategy, literacy, and governance. Nigeria, Egypt, China, and the UAE also rank among the top countries for organizational support. At the other end, respondents in Japan, Korea, and Portugal report the lowest levels of support for AI literacy, along with less confidence in responsible AI governance.

Overall, most countries reported less organizational support for responsible AI governance, in comparison to literacy and strategy. Chapter 3 further explores this governance gap, and the key barriers to responsible AI implementation.

Organizational support for AI and responsible use at work, 2025

Source: University of Melbourne and KPMG International, 2025 | Chart: 2026 AI Index report

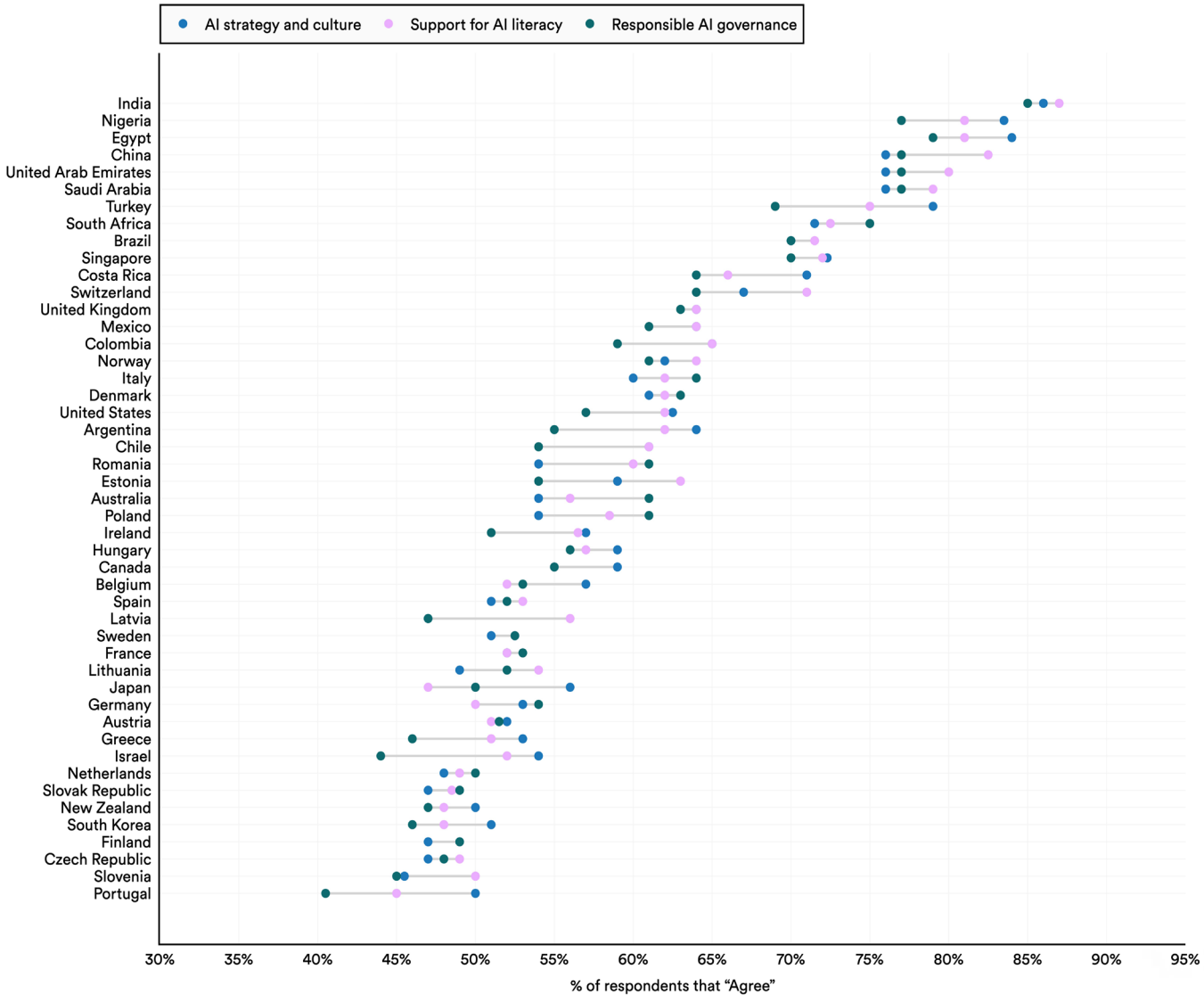


Figure 9.1.11

9.2 US Public and Expert Views on AI's Societal Impact

societal impact. The main sources[4] are Pew Research Center's 2024 survey of U.S. adults and AI experts, Elon University University Imagining the Digital Future Center's 2025 survey on expected effects on human capacities by 2035, and the Longitudinal Expert AI Panel (LEAP), conducted by the Forecasting Research Institute. For the Pew survey, AI experts were U.S.-based authors or presenters at AI-related conferences in 2023 or 2024 who reported that their work or research relates to AI.

Across nearly every topic surveyed, experts report more optimism than the U.S. public (Figure 9.2.1). The largest gaps show up around the future of work: 73% of AI experts said AI will have a positive impact on how people do their jobs, compared to 23% of U.S. adults. Similar gaps appear for the economy (69% vs. 21%), K–12 education (61% vs. 24%), and medical care (84% vs. 44%). For both groups, however, optimism is low in domains tied to trust and social connection, including elections, news, and personal relationships.

US perceptions of AI's societal impact: general public vs. experts

Source: Pew Research, 2025 | Chart: 2026 AI Index report

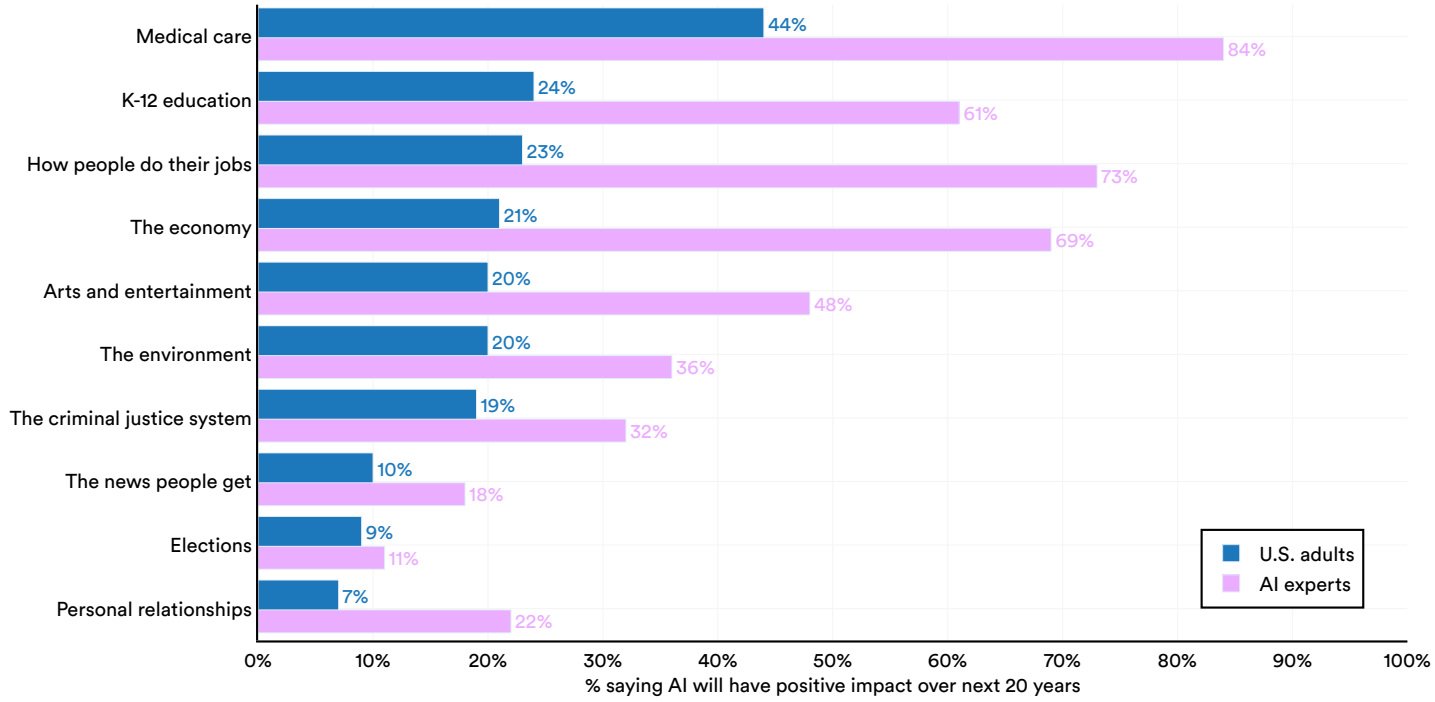


Figure 9.2.1

4 Sources: McClain, C. et al. (2025). *How the U.S. public and AI experts view artificial intelligence*. Pew Research Center. This report covers multiple research components conducted in 2024, including a U.S. survey of 5,410 adults conducted August 12–18, 2024, a survey of 1,013 AI experts living in the United States conducted August 14–October 31, 2024, and in-depth interviews with 30 individual AI experts conducted October 18–November 26, 2024. Rainie, L., & Anderson, J. (2025). *Many Americans expect AI to have significant negative impact on human capacities and behaviors such as social and emotional intelligence, analytical thinking and agency by 2035*. Imagining the Digital Future Center at Elon University. This national survey of 1,005 U.S. adults was conducted July 17–20, 2025. Kennedy, B. et al. (2025). *How Americans view AI and its impact on people and society.* Pew Research Center. This survey was conducted June 9–15, 2025, with a sample of 5,023 U.S. adults.

When asked to look ahead to 2035, the U.S. public is again more pessimistic than AI experts about the impact the technology is likely to have on key human traits such as thinking, learning, and creativity (Figure 9.2.2). U.S. adults are more likely than AI experts to anticipate negative effects on metacognition (53% vs. 36%), defined as the ability to think analytically about one's own thinking process, and decision-making (48% vs. 30%), which refers to problem-solving abilities. For social and emotional intelligence, defined as the ability to understand and manage social interactions, 51% of U.S. adults and 34% of experts expect AI to have a negative impact. Concern about mental well-being is high for both groups, with 55% of adults and 53% of experts saying AI will have a negative effect.

Impact of AI on key human capacities and traits: general public vs. experts

Source: Elon University, 2025 | Chart: 2026 AI Index report

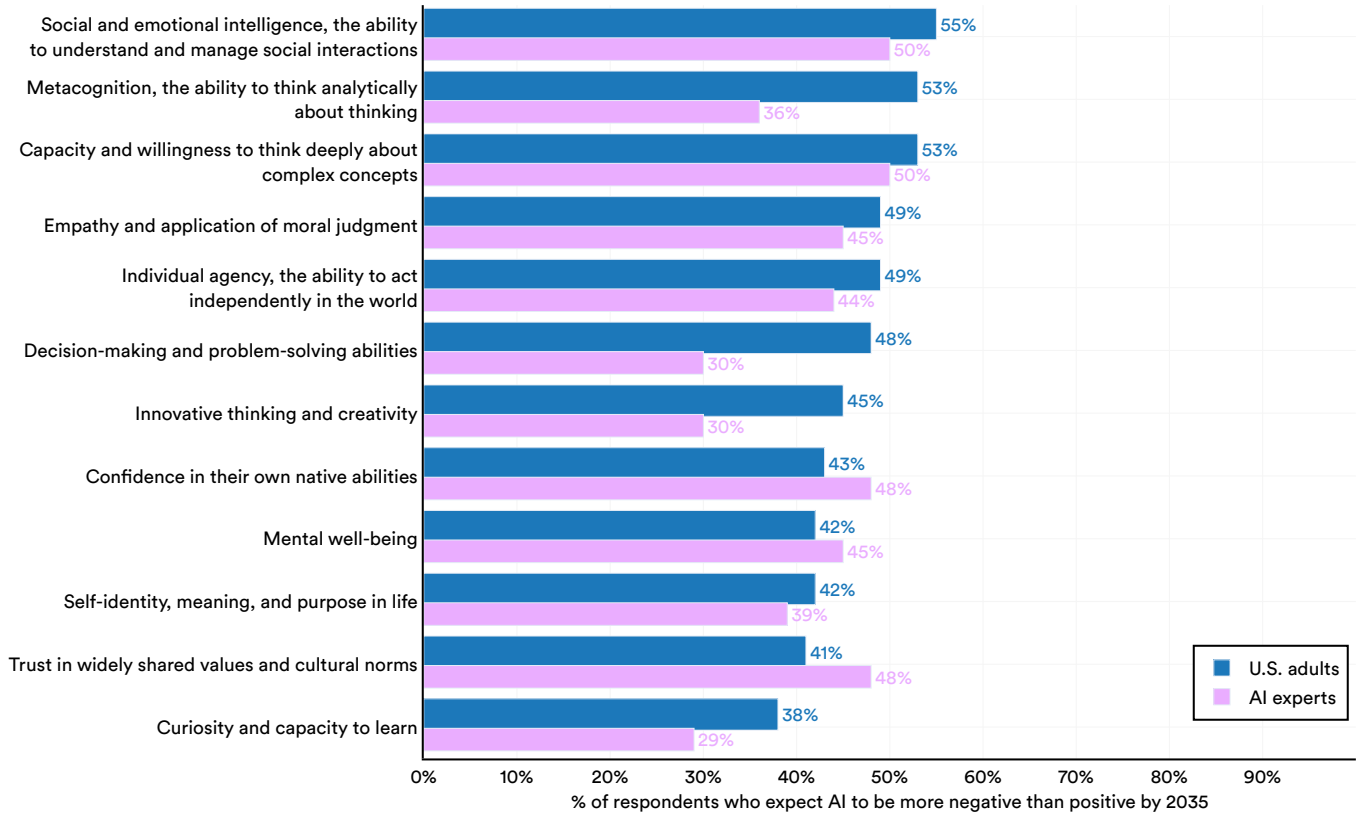


Figure 9.2.2

Beyond general sentiment, recent forecasting data shows even wider gaps in expected timelines and scale. The Longitudinal Expert AI Panel (LEAP), conducted by the Forecasting Research Institute, surveyed AI experts and the general public on specific AI milestones and adoption rates. Across 68 forecasts, experts consistently predicted much faster AI progress than the public.

In capability-focused forecasts, public views align with experts in only 9% of cases. When they diverge, the public expects slower progress 71% of the time. In direct comparison, experts are 16% more likely than the public to predict faster progress. Across specific metrics, the gaps are even more significant. By 2030, AI experts expect higher accuracy on complex math problems (+25 points), more AI-assisted work (+8.2), and greater adoption of autonomous ride-hailing (+8) (Figure 9.2.3). The public predicts greater electricity consumption by AI and a higher probability that AI solves a major mathematical problem. Looking further out to 2040, experts project a high likelihood of a transformative technological event occurring (+30) and much higher rates of daily AI companion use (+10) and AI-discovered drugs (+10). The gap in capability forecasts between the public and experts is notable as model performance continues to accelerate across a range of technical benchmarks. Chapter 2 tracks several of the significant breakthroughs of the past year.

Public vs. expert AI progress forecasts: 2030 and 2040 median predictions
Source: Forecasting Research Institute, 2026 | Chart: 2026 AI Index report

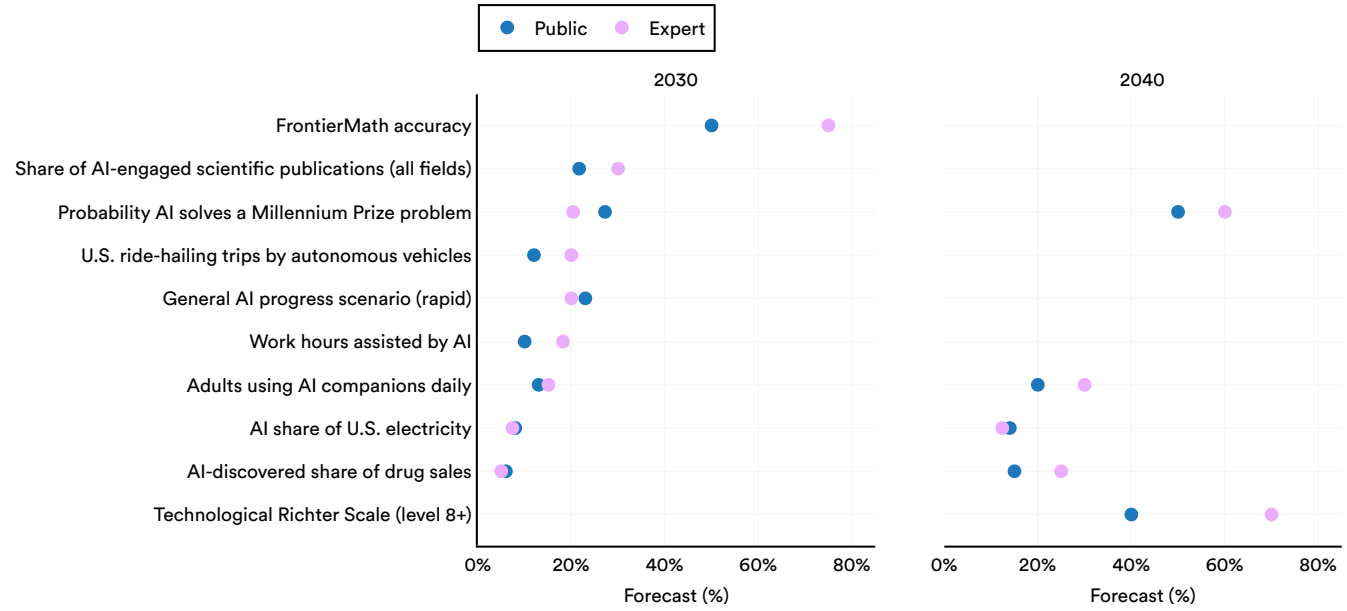


Figure 9.2.3[5]

Views on employment over the long term show a similar pattern (Figure 9.2.4). Nearly two-thirds or 64% of U.S. adults said AI will lead to fewer jobs in the next 20 years, while 5% said more jobs. Among experts, 39% predicted fewer jobs and 19% predicted more.

Views on whether AI will create or eliminate jobs: general public vs. experts
Source: Pew Research, 2025 | Chart: 2026 AI Index report

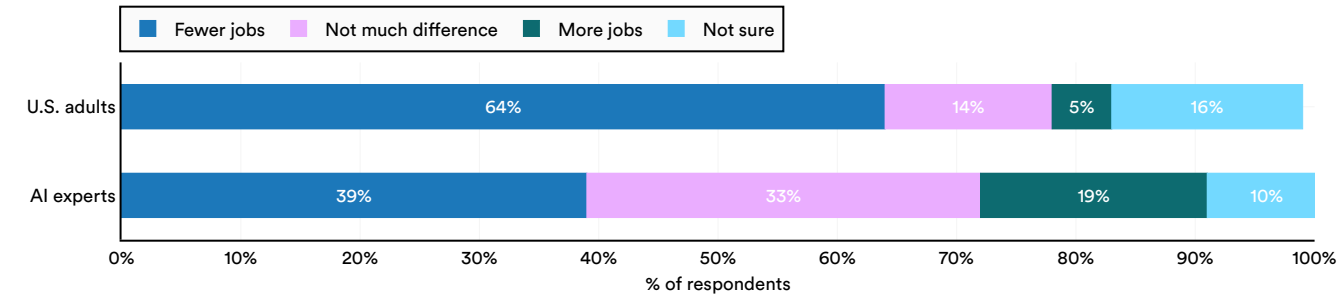


Figure 9.2.4

Experts forecast much faster workplace adoption than the public. The median prediction among experts is that generative AI will assist 8% of U.S. work hours in 2027, rising to 18% in 2030. The top 25% (75th percentile) of expert predictions is for over 30% AI-assisted work hours by 2030, compared to the top 10% (90th percentile) of predictions, at more than 40%. In contrast, the public expects slower adoption, at 10% by 2030 (Figure 9.2.5).

5 Not all questions in the LEAP survey were asked for both 2030 and 2040. Forecast horizons vary by topic and were set according to what was most meaningful or measurable for each question. As a result, the absence of a 2040 value for some items reflects survey design rather than missing responses.

Generative AI use intensity

Source: Forecasting Research Institute, 2026 | Chart: 2026 AI Index report

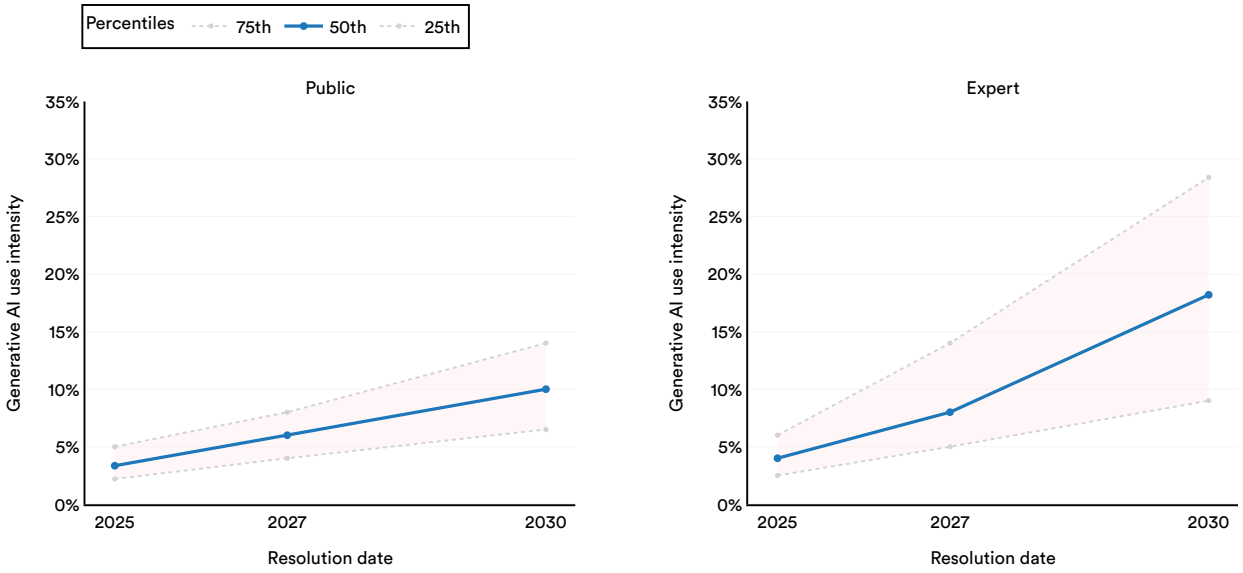


Figure 9.2.5

When asked about specific occupations, the U.S. public and AI experts identified certain jobs to be at higher risk for automation than others (Figure 9.2.6). There is strong consensus between the public and experts regarding automation risks for jobs such as cashiers, journalists, and software engineers. AI experts see a greater risk for truck drivers and lawyers, while the U.S. public believes AI will lead to fewer jobs for teachers and medical doctors. Mostly, both groups identify the same areas of vulnerability, but the public is generally more likely to anticipate job loss across categories.

Views on AI–driven job loss by occupation: general public vs. experts

Source: Pew Research, 2025 | Chart: 2026 AI Index report

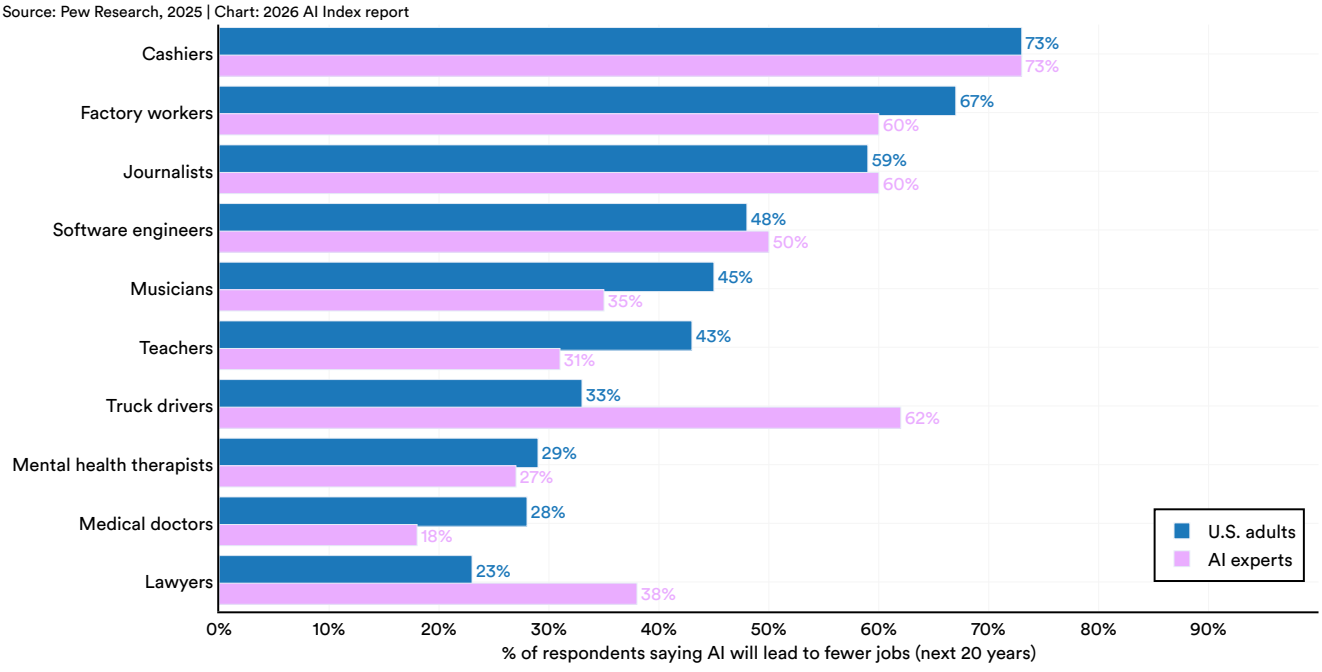
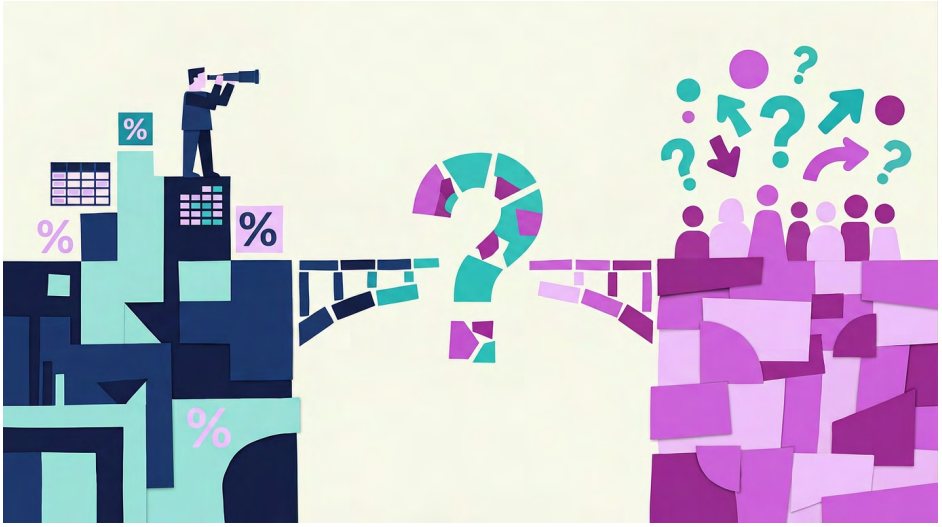


Figure 9.2.6



The gap in expert vs. public sentiment coincides with increasing awareness and adoption of AI In the United States. In 2025, 47% of U.S. adults said they had heard "a lot" about AI, up from 26% in 2022. Growth in awareness is steepest among younger adults, ages 18–29, (+29 percentage points since 2022), though it is also rising among those ages 65 and older (+13pp) (Figure 9.2.7).

Americans who have heard a lot about AI by age group, 2022–25

Source: Pew Research, 2025 | Chart: 2026 AI Index report

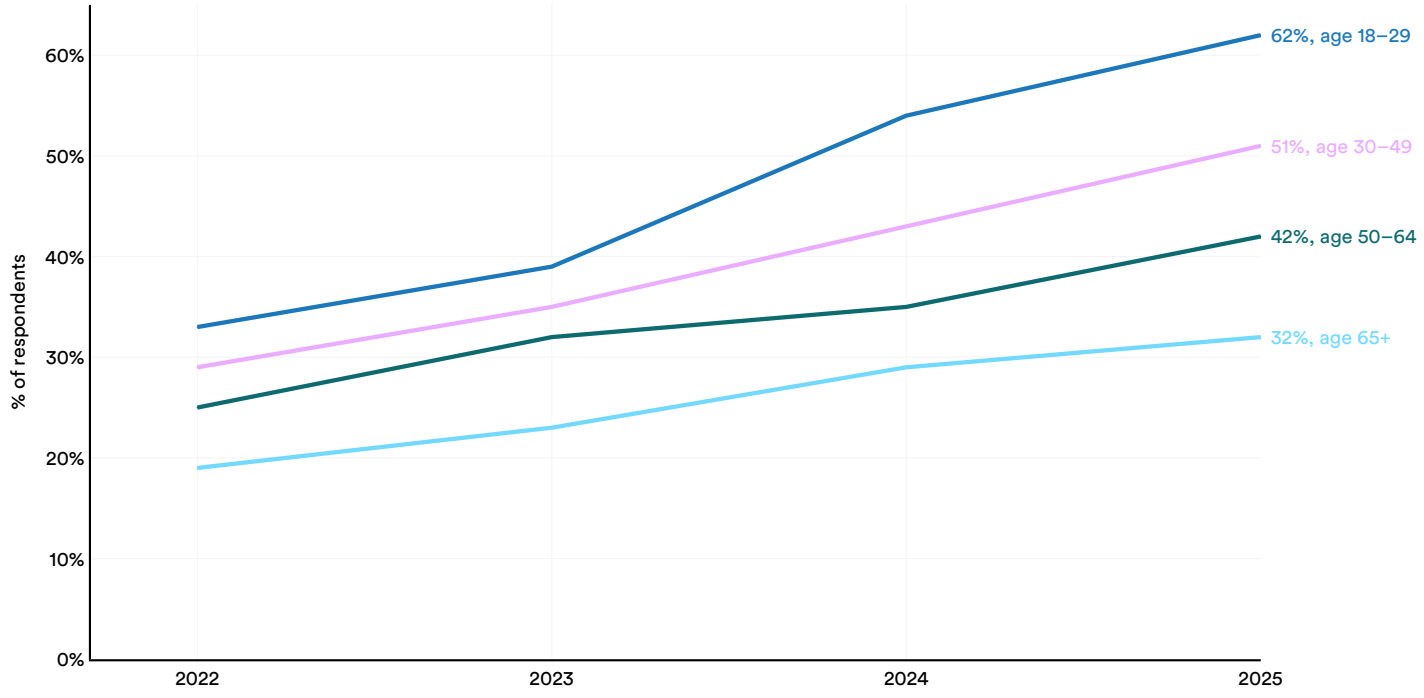


Figure 9.2.7

Adoption and frequency of use are also increasing. More than 60% of U.S. adults reported interacting with AI at least several times a week, and 31% said they interact with AI almost constantly or several times a day, though frequency varies according to age and race and ethnicity (Figure 9.2.8). Daily AI interaction is higher among younger adults, college-educated groups, Asian Americans, and men. Political affiliation differences are modest, with Democrats slightly more likely than Republicans to interact daily with AI. As a note, the results are based on when respondents believe they are interacting with AI and therefore may undercount exposure through other embedded systems like navigation, recommendations, or rankings.

Frequency of AI interaction among US adults by demographic group, 2025
Source: Pew Research, 2025 | Chart: 2026 AI Index report

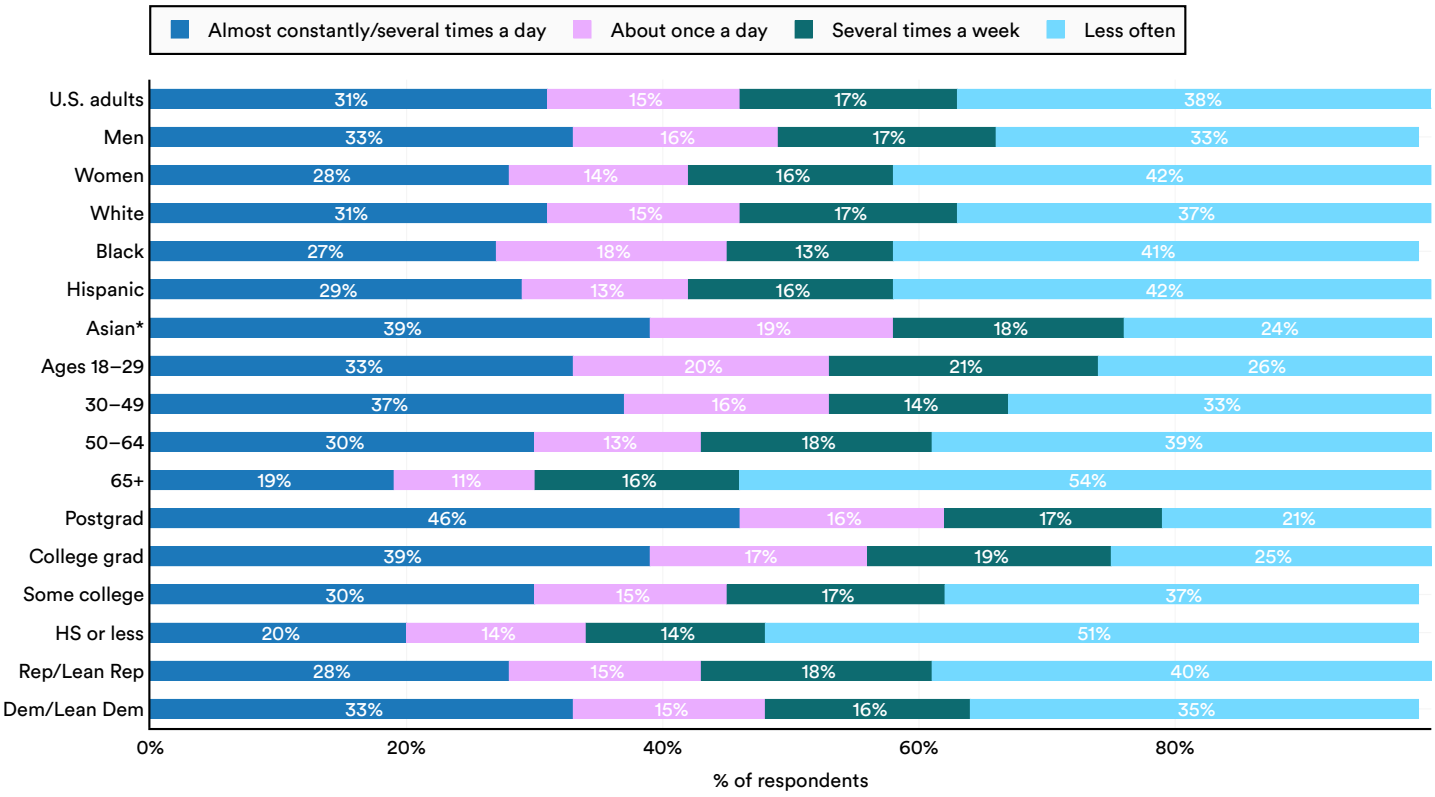


Figure 9.2.8[6]

6 "Asian" includes English-speaking respondents only. Respondents who did not provide an answer are not shown. "White," "Black," and "Asian" adults are non-Hispanic and report only one race; "Hispanic" adults may be of any race.

HIGHLIGHT:

Views on AI Companions

AI companionship, defined as relationships with AI systems designed for ongoing emotional and social support, represents one of the more contentious emerging uses of AI technology (Chou et al., 2024; Pan et al., 2025). Experts predict that 10% of U.S. adults will use AI for companionship at least once a day by 2027, with that number rising to 15% by 2030 and 30% in 2040 (Figure 9.2.9). The top quartile among experts' predictions forecast that more than 40% of the public will engage in daily AI companionship, while the top 10% predict over 60%. Expectations from the general public are significantly lower, at 20% by 2040. Both experts and the public find it less likely that mental health therapists will be replaced by AI, suggesting that there is an understanding on the limitations of AI companions. They cannot fully replace human expertise in complex or therapeutic contexts.

Projected daily AI companionship adoption among US adults

Source: Forecasting Research Institute, 2026 | Chart: 2026 AI Index report

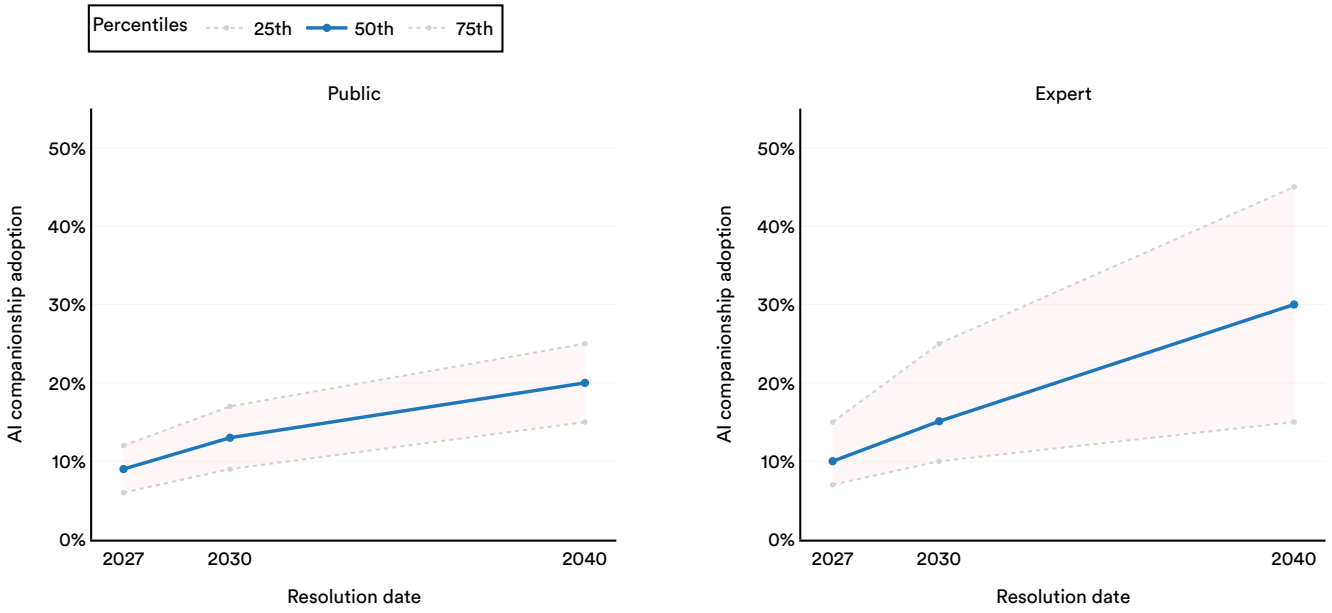


Figure 9.2.9

A 2026 Ipsos-Google survey found that 52% of worldwide respondents reported some level of excitement about using AI for companionship (Figure 9.2.10). In countries such as Nigeria, India, and the United Arab Emirates, over 20% of respondents said they were "extremely excited." The United States and Canada had the largest shares of respondents who were not excited at all, at 36% and 34%. Japan recorded very few "extremely excited" respondents, and had the highest share of "don't know" responses at 18%, nearly double the global average.

HIGHLIGHT:

Excitement about using AI for companionship

Source: Ipsos, Google 2026 | Chart: 2026 AI Index report

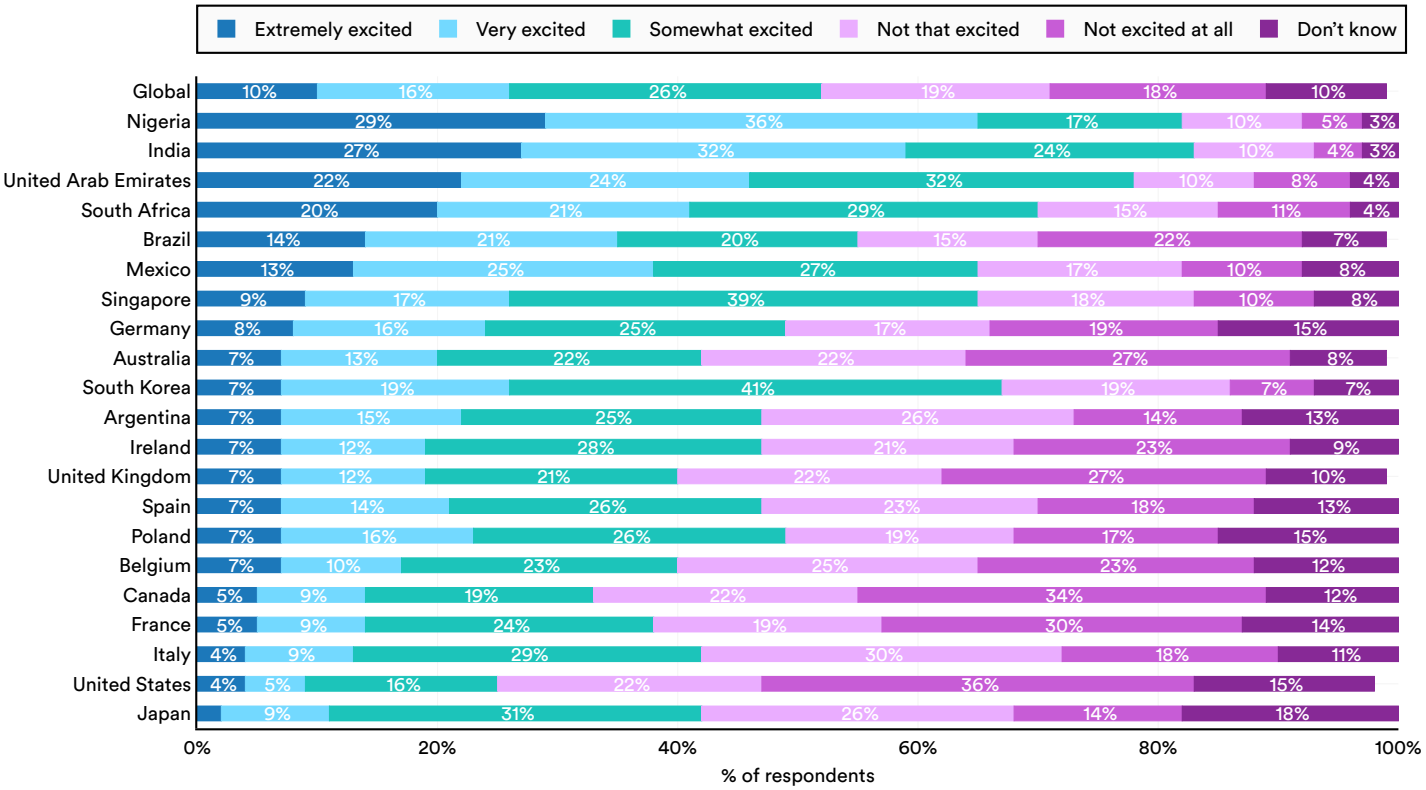


Figure 9.2.10[7]

AI companions differ from traditional task-oriented AI by prioritizing relationship building over functionality (Zhang and Lu, 2023; Zhang et al., 2025). Modern systems incorporate memory of past interactions, can recognize emotion, and adapt their responses to individual users' needs (Yang et al., 2025). Platforms like Replika, Character.ai, and XiaoICE have attracted user bases in the millions. Many users have reported forming emotional attachments to their AI companions, viewing them as friends, mentors, or romantic partners (Zhang et al., 2024; Kouros et al., 2024).

The technology has both benefits and risks. Research shows that AI companions can reduce loneliness to a similar degree as interacting with another human (Freitas et al., 2024), with users citing always-available support (11.9%) and a safe space for emotional expression (9.9%) as primary advantages. Mental health improvements were reported by 6.2% of users, and some credited their AI companions for helping them through crises (Pataranutaporn et al., 2025).

However, concerning patterns have emerged. Users frequently perceive chatbots as entities with needs, which poses a problem given the established correlation between emotional dependence and psychological distress (Bengio et al., 2025). Critical questions remain about whether these relationships reduce loneliness sustainably or undermine existing relationships and increase social isolation (Quinn et al., 2024).

7 Totals may not equal 100% due to rounding of individual values.

9.3 Perceptions on AI Trust, Transparency, and Regulation

Global Trust in Institutions

As AI becomes more embedded in daily life, the mechanisms around trust, transparency, and regulation also become more visible. In Ipsos' 2025 AI Monitor Survey, 79% of respondents said companies using AI should be required to disclose that usage (Figure 9.1.1). That view was shared across all 30 countries surveyed, even though overall trust in institutions was lower. Over half of respondents, or 54%, said they trust their government to regulate AI responsibly (Figure 9.3.1). The United States reported the lowest trust on this measure (31%). In parallel with the higher levels of optimism and excitement mentioned earlier, Southeast Asian countries reported the highest levels of trust in their governments, including Singapore (81%), Indonesia (76%), Malaysia (73%), and Thailand (70%).

Trust in government regulation of AI by country (% of total), 2025

Source: Ipsos, 2025 | Chart: 2026 AI Index report

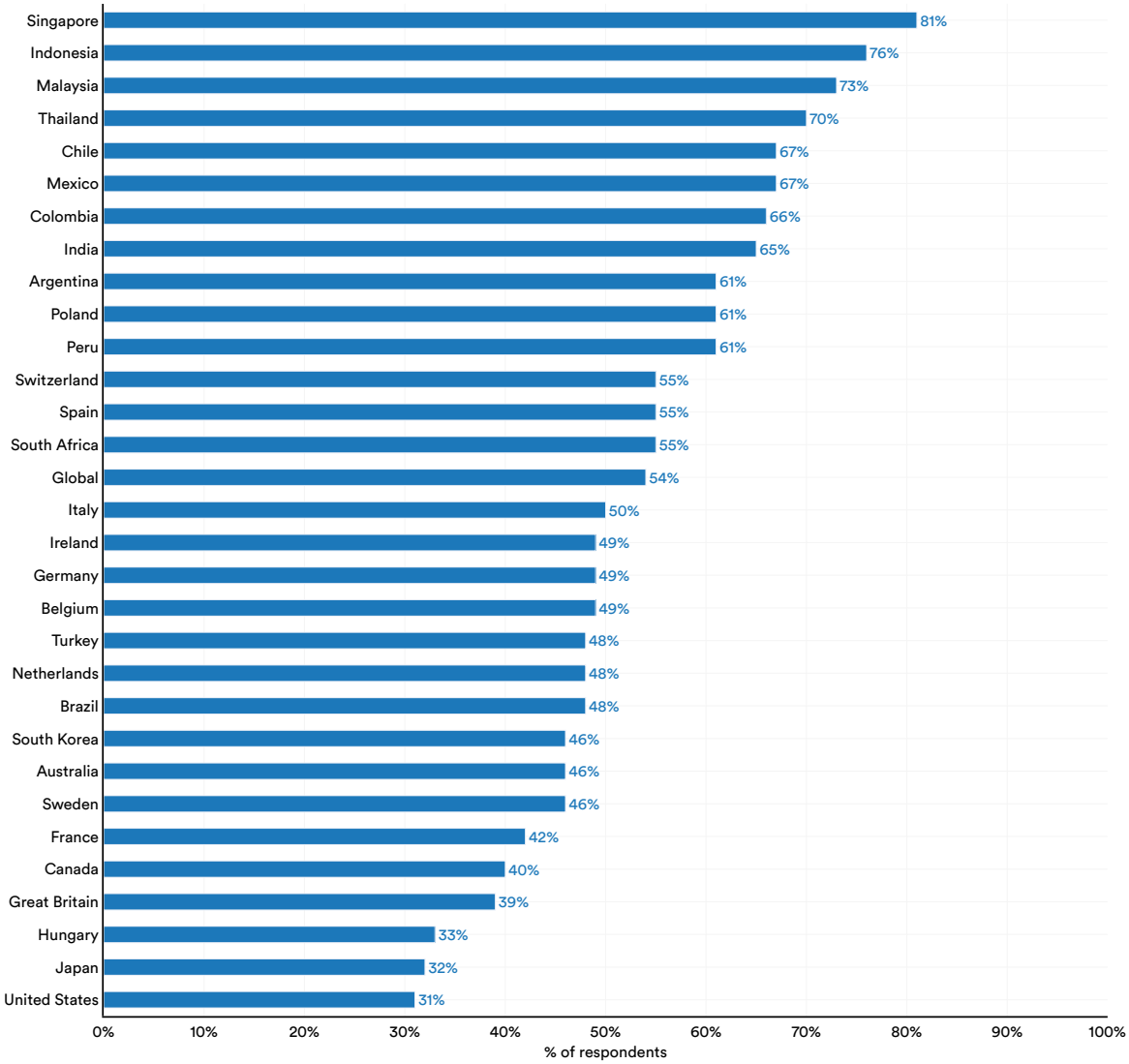


Figure 9.3.1

A separate Pew global survey asked a related question to compare respondents' trust in different governing bodies across the globe. Pew's Spring 2025 Global Attitudes Survey found that respondents tend to trust their own country most to regulate AI effectively, but trust in outside governments was mixed. Across the 25 countries surveyed, a median of 53% said they trust the EU to regulate AI effectively, compared to 37% for the United States and 27% for China (Figure 9.3.2). Trust in the Chinese government consistently received the lowest ratings across countries, while trust in the EU varied depending on whether respondents lived within or outside of the EU (Figure 9.3.2).

However, even within the EU, trust levels were not uniform. Respondents in Germany and the Netherlands were among the most trusting of the EU's ability to regulate AI effectively, while Greece and Italy were among the least trusting. In the United States, views were evenly divided between trust (44%) and distrust (47%) in the government's ability to regulate AI effectively, and 43% said they trust the EU on AI regulation. These trust dynamics are shifting against an expanding legislative landscape, outlined in Chapter 8, as the number of countries adopting national AI strategies continues to grow.

Trust in the European Union, United States, China, and own country to regulate AI, 2025
Source: Pew Research, 2025 | Chart: 2026 AI Index report

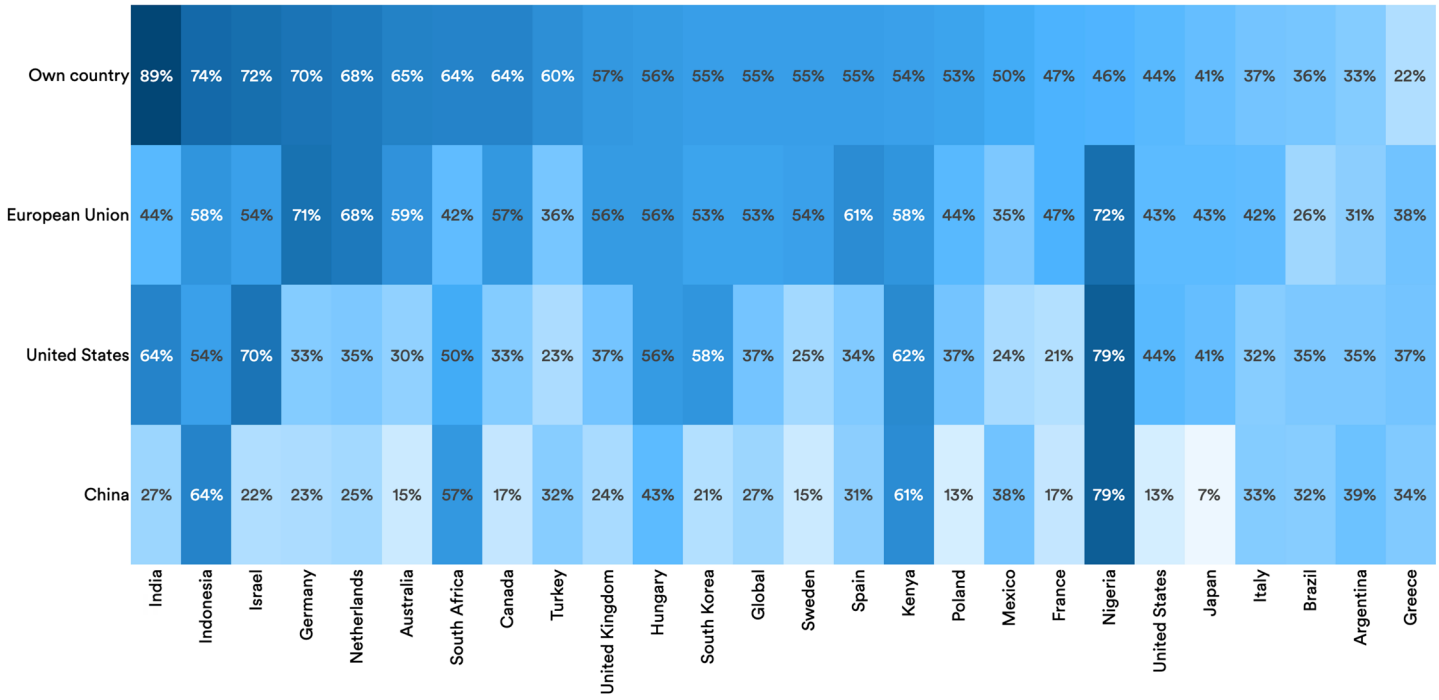


Figure 9.3.2

A separate Ipsos/Google survey shows a related divide in relation to public priorities. Globally, 58% of respondents said it was more important to foster advances in science, medicine, and other fields through AI innovation, compared to 41% who prioritized protecting industries that may be affected by AI through regulation (Figure 9.3.3). Most countries in the survey lean toward innovation, though South Africa, India, and Ireland were among the few where respondents were more likely to prioritize regulation. Across these different measures, public views on AI governance appear mixed and varied in trust, priorities, and regulatory expectations.

Global priorities: AI innovation vs. AI regulation, 2025
Source: Ipsos, Google 2026 | Chart: 2026 AI Index report

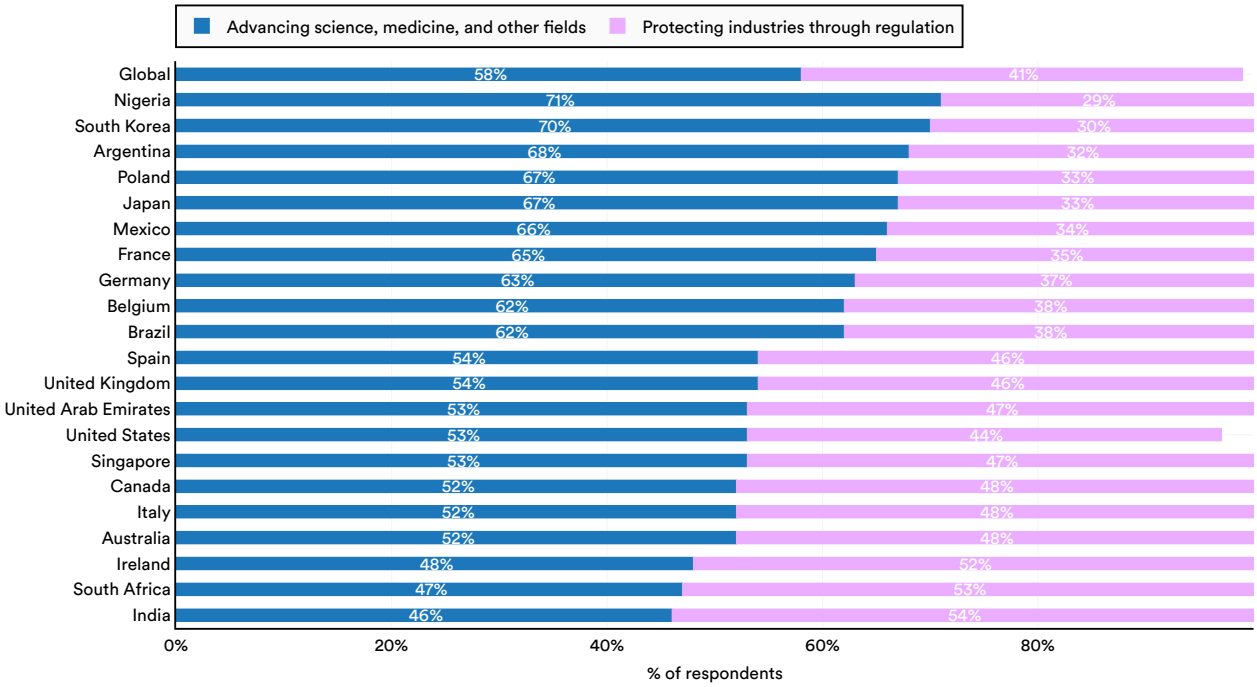


Figure 9.3.3[8]

Net concern for not enough vs. too much AI regulation by US state, 2025
Source: CHIP50, 2025 | Chart: 2026 AI Index report

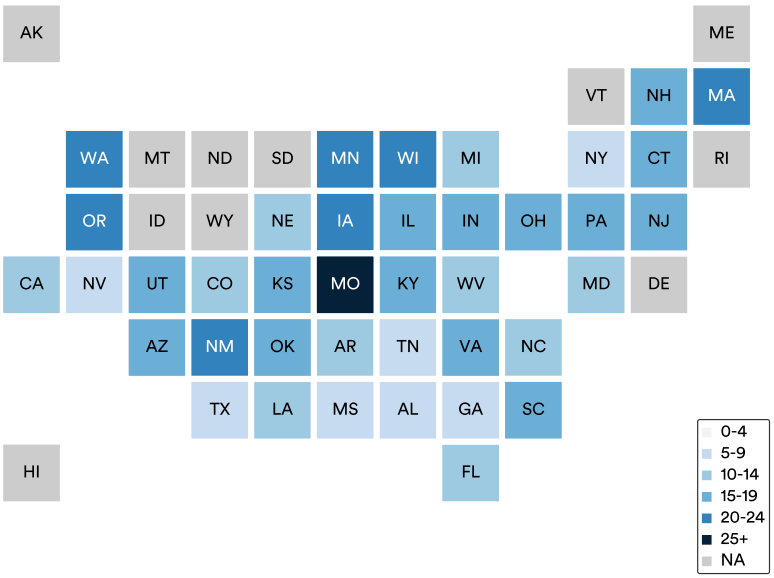


Figure 9.3.4

US Attitudes Toward AI Regulation

In the United States, attitudes toward AI regulation vary meaningfully by geography. In 2025, the Civic Health and Institutions Project fielded a survey across 50 states, and asked respondents whether federal regulation of AI would go too far, not far enough, or "not sure" (Figures 9.3.4 and 9.3.5). Across every state, concern about too little regulation outnumbers concern about too much regulation (41% vs. 27%), but the level of uncertainty is substantial, with more than one-third of respondents selecting "not sure."

New York and Tennessee reported the highest levels of concern that regulation will go too far (31%), while Missouri and Washington had the highest shares who said the government will not go far

8 In Ipsos' reporting of findings, percentage points are rounded to the nearest whole number. As a result, figures may not add up to exactly 100%.

enough (48%). Across nearly every state, more respondents said regulation does not go far enough than said it goes too far. Roughly one in three respondents in most states said they were not sure, making uncertainty the second-largest category.

Support for AI federal regulation by US state, 2025

Source: CHIP50, 2025 | Chart: 2026 AI Index report

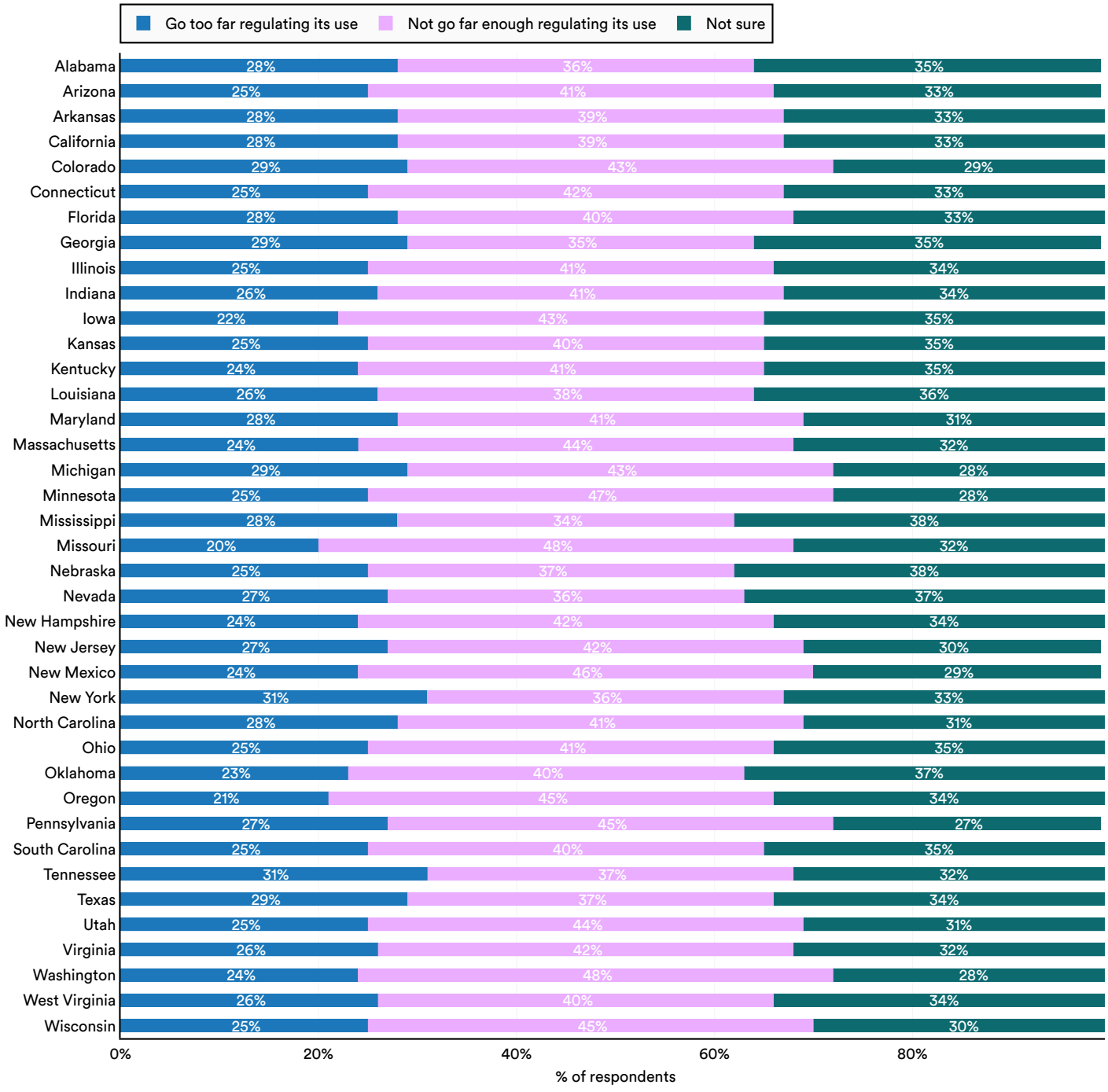


Figure 9.3.5

Across U.S. demographic groups, the strongest concern about insufficient AI regulation was reported among older adults, especially those 65 and older (51%) (Figure 9.3.6). Education was associated with stronger support for more regulation, with 46% of college graduates saying the government will not go far enough, compared with 34% among respondents with a high school degree or less. Political affiliation was not a significant differentiator, although Democrats were more likely than Republicans to say regulation will not go far enough (45% vs. 40%), while concern about going too far is similar across parties (>25%).

Attitude toward AI federal regulation in the US by demographic group, 2025

Source: CHIP50, 2025 | Chart: 2026 AI Index report

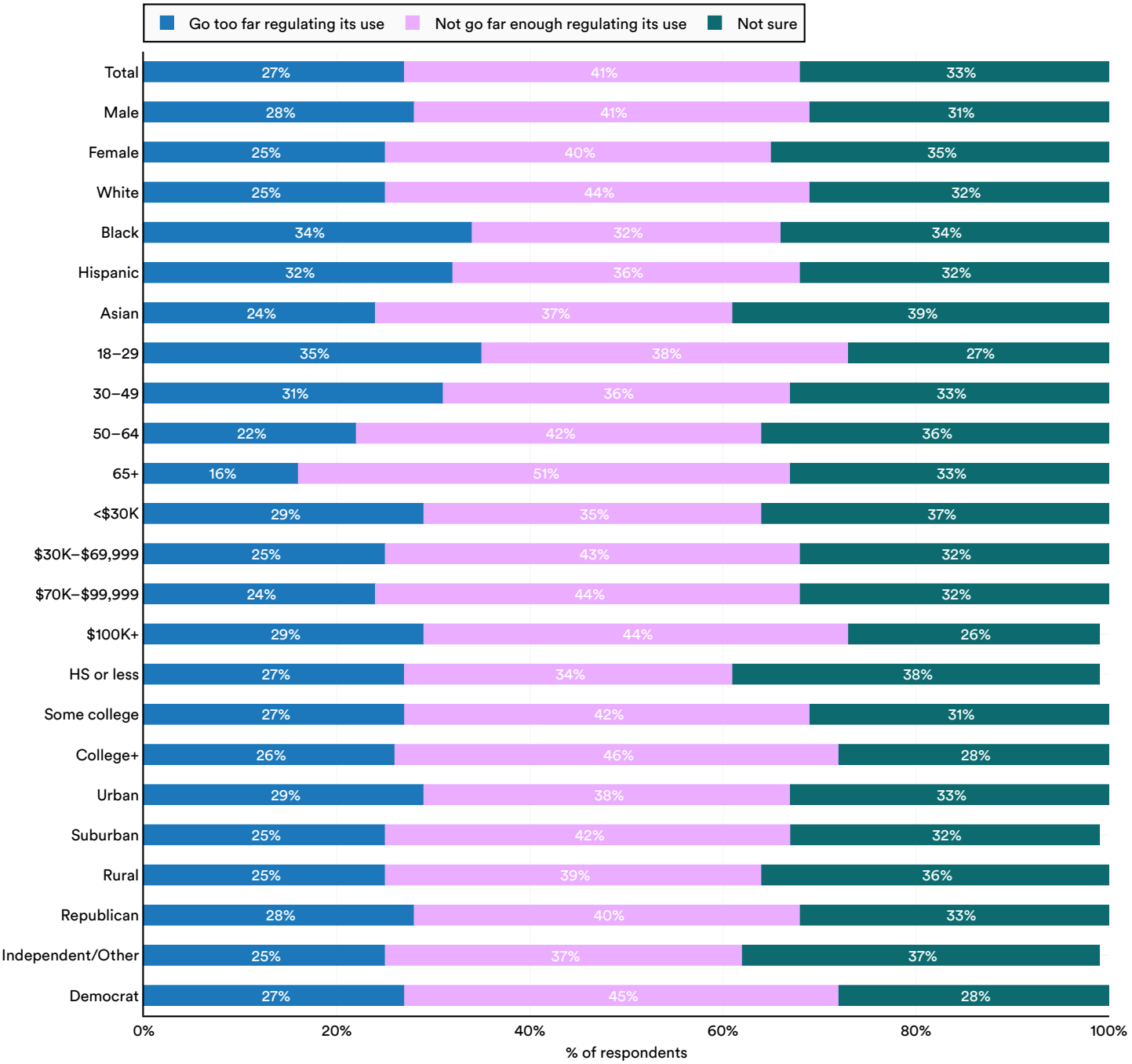


Figure 9.3.6