

Chapters by Theme



1	Awareness of Al	Slide 4
2	Usage of Al	Slide 14
3	Perceptions of Al	Slide 52
4	Areas That Would Benefit From Al	Slide 120
5	Likelihood To Use an Al Assistant	Slide 122
6	Al & Elsevier	Slide 127



Data Breakdowns Included



	NB. included in the total but are not broken out
Region	N=22, 1% of total, prefer not to say where they live
Key Markets	
• Gender	N=116, 5% of total, prefer not to say their gender.
Years Active	N=192, 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=22, 1% of total, prefer not to say where they live. Also, n=19, 0.8% of total, live in low-income countries (n too low to breakout)



1. Awareness of Al

Theme 1



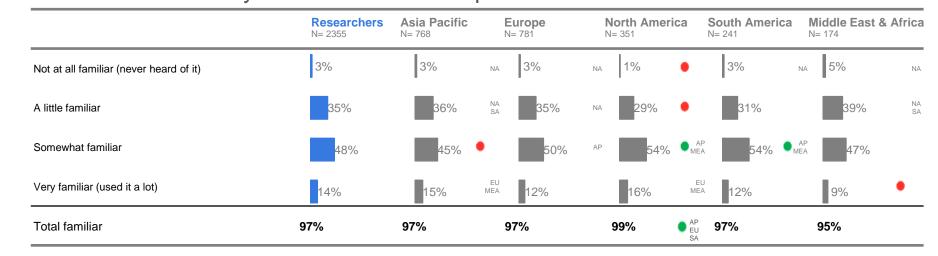
Awareness of Al

To what extent are you familiar with AI? (only shown by region, key market and country income band). Subsequent statistics exclude those not familiar with AI.	Slide 6
Which of these AI products, if any, have you heard of before today? (only shown top 8)	Slide 9





6







Global

Awareness of AI is highest in China and USA at 99%



	Researchers N= 2355	USA N= 301	China N= 314	India N= 105
Not at all familiar (never heard of it)	3%	1%	• 1%	• 4% CH US
A little familiar	35%	28%	42%	• us 43% • us
Somewhat familiar	48%	54%	• CH 1N 42%	41%
Very familiar (used it a lot)	14%	17%	15%	12%
Total familiar	97%	99%	● IN 99%	● IN 96%

Researchers in high income countries are more likely to be very familiar with AI



	Researchers N= 2355	High Income N= 1208	Upper- Middle-Inco N= 803	Lower- me Middle-Inc N= 282	ome
Not at all familiar (never heard of it)	3%	3%	2%	4%	UM
A little familiar	35%	29%	939%	• н 41%	• ні
Somewhat familiar	48%	52%	● LM 45%	45%	
Very familiar (used it a lot)	14%	16%	■ LM 13%	10%	•
Total familiar	97%	97%	98%	LM 96%	

Note. Subsequent statistics exclude those not familiar with Al.



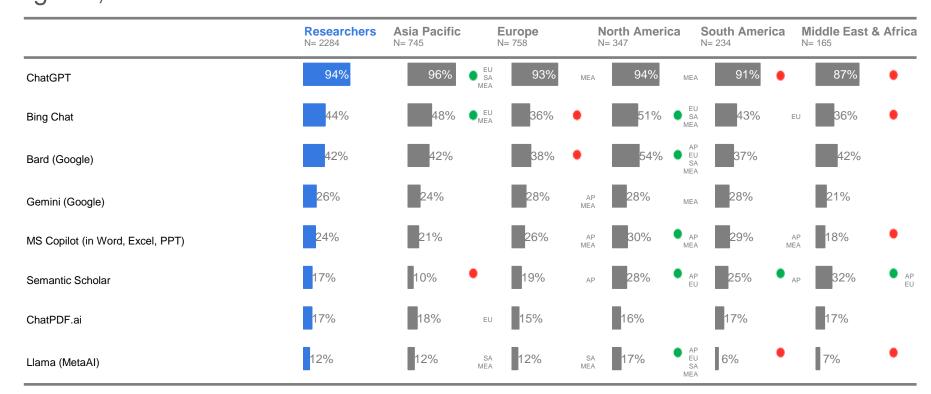
Significantly higher than...

0111

Questions: To what extent are you familiar with AI?

ChatGPT is the tool that most have heard about, this is consistent across regions, more have heard above ChatGPT in APAC





Note: Only top 8 products shown



Select: all that apply

Base: n= 2284

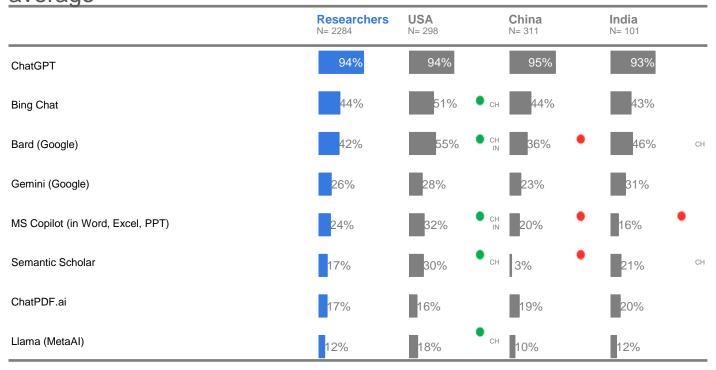
ChatGPT is the tool most have heard about. Researchers in the USA are more likely to have heard of Bard and Bing Chat (among others) than average



Select: all that apply

Base: n= 2284

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



Note: Only top 8 products shown

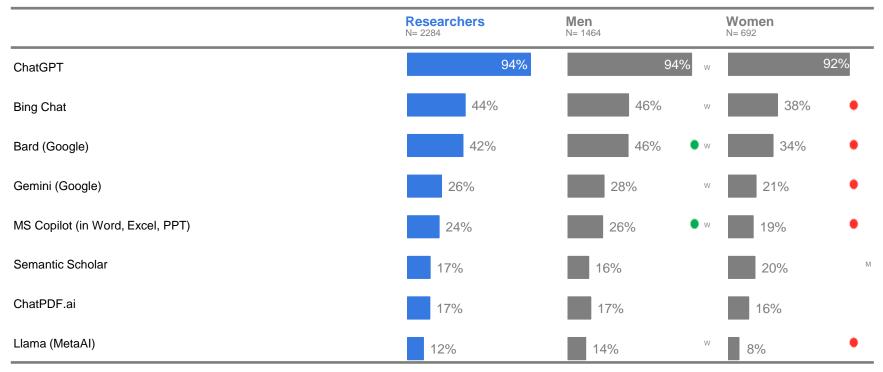


Global



ChatGPT is the tool most have heard about. Women working in research are less likely to be aware than men of some AI tools



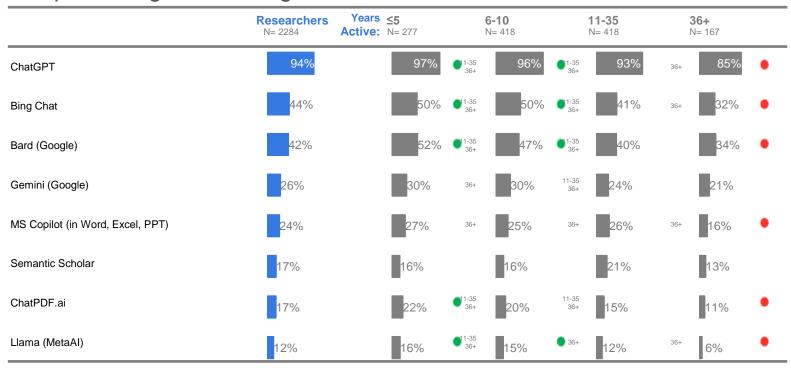


Note: Only top 8 products shown



Researchers who have been in their area of work longest (36+ years active) are less likely to have heard of ChatGPT, and other similar tools compared to global average





Note: Only top 8 products shown



Global



Researchers in high income countries are more likely to have heard of ChatGPT, Bing Chat and Bard than average



	Researchers N= 2284	High Income N= 1172		Upper- Middle-Inco	me	Lower- Middle-Inco	ome
ChatGPT	94%	96%	● LM UM	92%	•	91%	•
Bing Chat	44%	48%	• LM UM	40%	•	40%	
Bard (Google)	42%	49%	• LM UM	34%	•	42%	UM
Gemini (Google)	26%	27%		26%		23%	
MS Copilot (in Word, Excel, PPT)	24%	29%	LM UM	20%	•	16%	•
Semantic Scholar	17%	20%	UM	12%	•	23%	UM
ChatPDF.ai	17%	15%		18%	ŀ	20%	Н
Llama (MetaAl)	12%	16%	• LM UM	8%	•	8%	•

Note: Only top 8 products shown



2. Usage of Al

Theme 2



Usage of Al

Have you used an AI product or an AI feature on a product you use regularly?	Slide 16
Which, if any, AI products or AI features have you used for work purposes? (only shown top 8)	Slide 21
Which of the following describes why you haven't used an AI product or AI feature?	Slide 27
Do you expect you will choose to use AI in the near future?	Slide 32
Which restrictions, if any, does your institution currently have with regards to AI usage?	Slide 37
In which ways, if any, is your institution preparing for AI usage?	Slide 42



Of researchers who are familiar with AI, nearly 60% have used it. Researchers in MEA are less likely to have used AI for work than average



	Researchers N= 2284	Asia Pacific N= 745	Europe N= 758	North America N= 347	South America N= 234	Middle East & Africa N= 165
Yes - for a specific work-related purpose	37%	39%	EU 34%	37%	38%	30%
Yes – but just to test it or for a non-work purpose	22%	21%	23%	21%	26%	27%
No	40%	39%	42%	42%	36%	41%
Don't know / not sure	1%	0%	1%	AP 0%	0%	2% • AP NA SA

Of those who are familiar with AI, six in ten have used it. Across the three most populous countries researchers in India are less likely to have used it for work than seen globally



	Researchers N= 2284	USA N= 298	China N= 311	India N= 101
Yes - for a specific work-related purpose	37%	38%	IN 41%	IN 28%
Yes – but just to test it or for a non-work purpose	22%	21%	15% •	28% сн
No	40%	41%	43%	44%
Don't know / not sure	1%	0%	0%	1%

Of those who are familiar with AI, male researchers are more likely to have used AI for a work-related purpose when compared to female researchers



	Researchers N= 2284	Men N= 1464	Women N= 692
Yes - for a specific work-related purpose	37%	38% w	34%
Yes – but just to test it or for a non-work purpose	22%	22%	22%
No	40%	39%	43% M
Don't know / not sure	1%	1%	1%

Research

Of those who are familiar with AI, researchers who have been in their area of work longest (36+ years active) are less likely to have used AI for work



	Researchers N= 2284	Years ≤5 Active: N= 277	6-10 N= 418		1-35 ⊌= 418		36+ N= 167	
Yes - for a specific work-related purpose	37%	38%	36+	42% 1 -35 36+	35%	36+	27%	•
Yes – but just to test it or for a non-work purpose	22%	26%	36+ 22	2%	23%		18%	
No	40%	36%		36%	41%		54%	6-10 ●11-35 ≤5
Don't know / not sure	1%	1%	1%)	1%		1%	

Of those who are familiar with AI, researchers in high income countries are more likely to have used AI (for any purpose) than seen globally



Base: n= 2284

	Researchers N= 2284	High Income N= 1172	Upper- Middle-Income N= 787	Lower- Middle-Income N= 271
Yes - for a specific work related purpose	37%	37%	ьм 37%	LM 28% •
Yes – but just to test it or for a non-work purpose	22%	24%	им 19%	26% UM
No	40%	37%	43%	^{HI} 45%
Don't know / not sure	1%	1%	1%	1%

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

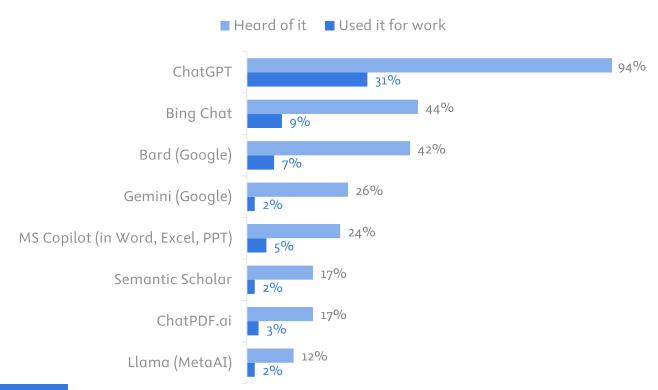


Significantly higher/ lower than... Significantly higher than...

ChatGPT is by far the most well-known Al product



with nearly a third of researchers having used it for work



Research

ChatGPT is the tool that most have used for work purposes, more so in APAC



Base: n= 2284

	Researchers N= 2284	Asia Pacific N= 745	Europe N= 758		North America N= 347	South America N= 234	Middle East & Africa
ChatGPT	31%	35%	EU NA 28%	•	29% _N	ва 33%	EU 22%
Bing Chat	9%	11%	eu NA MEA 7%	•	7%	9%	6%
Bard (Google)	7%	7%	6%		7%	11%	AP 8%
MS Copilot (in Word, Excel, PPT)	5%	5%	5%		7% N	EA 6%	3%
ChatPDF.ai	3%	3%	3%		3%	3%	2%
Gemini (Google)	3%	3%	3%		2%	3%	3%
Semantic Scholar	2%	1%	3%	Al	2%	5%	AP 7% P EU NA
Elicit	2%	1%	2%		2%	4%	AP MEA 0%

Note: Only top 8 products shown



ChatGPT is the tool that most have used for work purposes, more so in China



	Researchers N= 2284	USA N= 298		China N= 311		India N= 101	
ChatGPT	31%	30%		37%	•	IN 23%	•
Bing Chat	9%	7%		14%	•	us 11%	
Bard (Google)	7%	8%	СН	3%	•	10%	СН
MS Copilot (in Word, Excel, PPT)	5%	7%	СН	4%		6%	
ChatPDF.ai	3%	3%	IN	3%		^{IN} 0%	•
Gemini (Google)	3%	2%		3%		3%	
Semantic Scholar	2%	3%	СН	0%	•	3%	СН
Elicit	2%	3%	СН	0%	•	0%	

Note: Only top 8 products shown



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





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

ChatGPT is the tool that most have used for work purposes. More men have used ChatGPT for work than women



	Researchers N= 2284	Men N= 1464	Women N= 692
ChatGPT	31%	33%	29%
Bing Chat	9%	11%	
Bard (Google)	7%	8% v	w 4%
MS Copilot (in Word, Excel, PPT)	5%	6%	4%
ChatPDF.ai	3%	3%	2%
Gemini (Google)	3%	3%	2%
Semantic Scholar	2%	3%	2%
Elicit	2%	2%	2%

Note: Only top 8 products shown





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

Select: all that have used

ChatGPT is the tool that most have used for work purposes. Those active in their area of work the longest are less likely to have heard of the more well-known Al products



Base: n= 2284

		/ears ≤5 tive: N= 277		-10 = 418		1 1-35 N= 418		6+ = 167	
ChatGPT	31%	33%	36+	37%	1-35 36+	30%	36+	21%	•
Bing Chat	9%	11%	11-35 36+	13%	1-35 36+	8%		5%	•
Bard (Google)	7%	9%	36+	9%	36+	7%		4%	
MS Copilot (in Word, Excel, PPT)	5%	4%		7%	≤5 36+	5%	36+	2%	•
ChatPDF.ai	3%	3%	36+	3%	36+	3%	36+	1%	•
Gemini (Google)	3%	3%		3%		2%		2%	
Semantic Scholar	2%	2%		1%		4%	6-10	1%	
Elicit	2%	2%		1%		2%		0%	

Note: Only top 8 products shown



ChatGPT is the tool that most have used for work purposes, less so by researchers in lower-middle-income countries



Base: n= 2284

	Researchers N= 2284	High Income N= 1172	Income		Upper- Middle-Income N= 787	
ChatGPT	31%	32%	LM	33%	LM	23%
Bing Chat	9%	8%		10%	НІ	8%
Bard (Google)	7%	9%	UM	5%		9% им
MS Copilot (in Word, Excel, PPT)	5%	6%	UM	4%		5%
ChatPDF.ai	3%	3%		3%		2%
Gemini (Google)	3%	2%		3%		2%
Semantic Scholar	2%	3%	UM	1%		4%
Elicit	2%	2%	UM	1%		1%

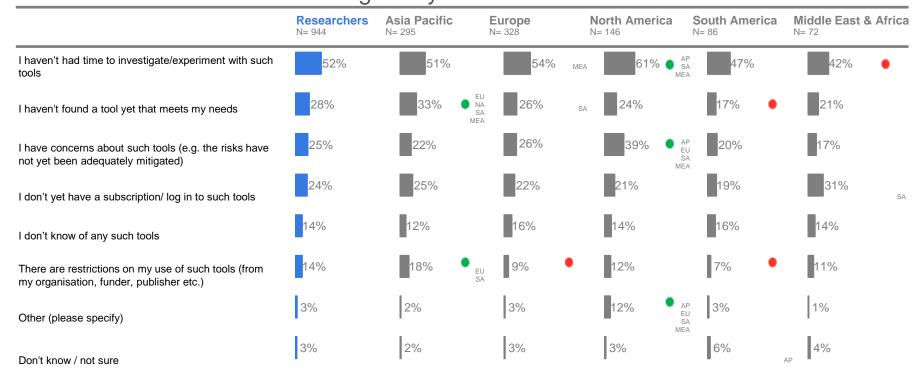
Note: Only top 8 products shown



• •

Lack of time is the main reason researchers haven't used AI, this is consistent across regions. Researchers in North America are more likely to have not used Al due to concerns than is seen globally







Research

Global

Most common reason for not using AI is a lack of time, this is consistent across the three most populous countries but lower in India



	Researchers N= 944	USA N= 122	China N= 135	India N= 45
I haven't had time to investigate/experiment with such tools	52%	62% • IN	59% IN	36%
I haven't found a tool yet that meets my needs	28%	26%	36%	27%
I have concerns about such tools (e.g. the risks have not yet been adequately mitigated)	25%	43% • CH	21%	11%
I don't yet have a subscription/ log in to such tools	24%	23%	31%	29%
I don't know of any such tools	14%	13%	7%	29% • CH US
There are restrictions on my use of such tools (from my organisation, funder, publisher etc.)	14%	13%	24% IN US	7%
Other (please specify)	3%	10% CH		0%
Don't know / not sure	3%	2%	3%	2%



Concern about the risks of AI tools is a common barrier to use, felt more among women who haven't used AI than men



	Researchers N= 944 Men N= 593		Women N= 302
I haven't had time to investigate/experiment with such tools	52%	52%	54%
I haven't found a tool yet that meets my needs	28%	31% v	22%
I have concerns about such tools (e.g. the risks have not yet been adequately mitigated)	25%	21%	31% • м
I don't yet have a subscription/ log in to such tools	24%	24%	23%
I don't know of any such tools	14%	14%	15%
There are restrictions on my use of such tools (from my organisation, funder, publisher etc.)	14%	13%	14%
Other (please specify)	3%	2%	5%
Don't know / not sure	3%	2%	4%

Research

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

Lack of time is the main reason for researchers not having used AI, and researchers active in their role ≤5 less likely to have not used AI due to lack of time than seen globally



	Researchers N= 944	Years ≤5 Active: N= 96		6-10 N= 150	-	1-35 = 150		36+ N= 97	
I haven't had time to investigate/experiment with such tools	52%	41%	•	56%	≤5	56%	≤5	52%	
I haven't found a tool yet that meets my needs	28%	28%		27%		27%		26%	
I have concerns about such tools (e.g. the risks have not yet been adequately mitigated)	25%	29%	36+	30%	36+	26%	36+	15%	•
I don't yet have a subscription/ log in to such tools	24%	22%		21%		24%		24%	
I don't know of any such tools	14%	9%		13%		15%		19%	≤5
There are restrictions on my use of such tools (from my organisation, funder, publisher etc.)	14%	19%	1-35 36+	21%	11-35 36+	10%		7%	•
Other (please specify)	3%	3%		5%		3%		4%	
Don't know / not sure	3%	6%	36+	2%		2%		1%	

More researchers in high income countries state lack of time as the main barrier to use of AI than average



	Researchers N= 944	Income		Upper- Middle-Income N= 345		Lower- Middle-Income N= 125	
I haven't had time to investigate/experiment with such tools	52%	59%	LM UM	50%	LM	37%	
I haven't found a tool yet that meets my needs	28%	25%		33%	HI LM	24%	
I have concerns about such tools (e.g. the risks have not yet been adequately mitigated)	25%	31%	LM UM	22%		16%	
I don't yet have a subscription/ log in to such tools	24%	19%		26%	HI	29%	НІ
I don't know of any such tools	14%	13%		12%		22%	HI UM
There are restrictions on my use of such tools (from my organisation, funder, publisher etc.)	14%	13%	LM	16%	LM	8%	
Other (please specify)	3%	6%	LM UM	2%		0%	
Don't know / not sure	3%	2%		4%		2%	

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

Research

Of researchers who have not used AI, more than two-thirds expect to use it within the next two to five years. This is highest in MEA and lowest in North America



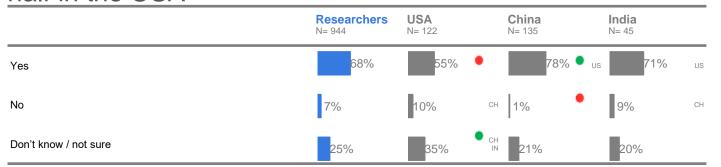






Around two-thirds of those researchers who haven't used AI expect to use it within the next 2-5 years globally, but this figure is only around half in the USA







Significantly higher/lower than...

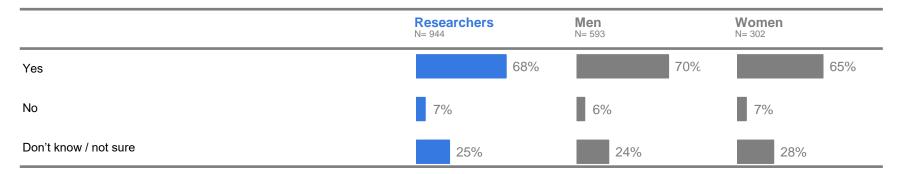
Significantly higher than.



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

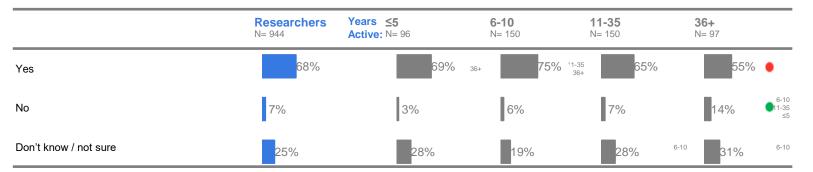
Most researchers who haven't used AI expect they will use it in the near future, there is no statistical difference between men and women





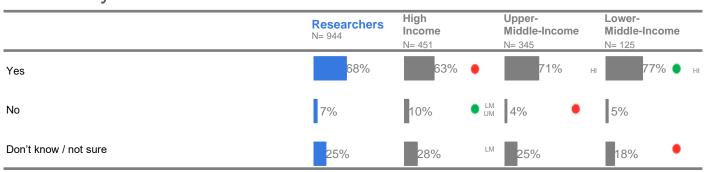
Of those who haven't already used it, researchers who've been in their area of work longest (36+ years active) are less likely to use AI in the near future





Researchers in lower-middle-income countries who haven't used AI, are more likely to choose to use it in the near future





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



	Researchers N= 2284	Asia Pacific N= 745		urope = 758		North Amer l= 347	rica	South Ame N= 234		Middle East N= 165	& Africa
Don't know / not sure	31%	31%		30%		36%	• EU	27%		28%	
Prohibited to upload confidential information into public generative AI platforms	28%	32%	EU SA MEA	27%	SA MEA	29%	SA MEA	18%	•	15%	•
Lack of budget to pay for AI products or features	25%	25%	NA	23%		20%	•	32%	• AF EU NA	39%	AP EU NA
Prohibited to use it for certain purposes	19%	21%	EU SA	17%	SA	22%	EU SA	11%	•	20%	SA
None of the above	13%	11%		16%	• AP NA	12%		18%	AF NA MEA	12%	
Prohibited to use certain tools	11%	12%	SA MEA	11%	SA MEA	15%	SA MEA	6%	•	6%	•
Other (please specify)	3%	2%	•	4%	AP MEA	5%	● AP MEA	5%	● AF	1%	•
Prohibited to use it in any way	1%	2%		1%		1%		1%		1%	



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 higher for researchers in China



	Researchers N= 2284	USA N= 298	China N= 311	India N= 101
Don't know / not sure	31%	35% IN	38%	21%
Prohibited to upload confidential information into public generative AI platforms	28%	29%	32%	28%
Lack of budget to pay for AI products or features	25%	19%	24%	33% • CH
Prohibited to use it for certain purposes	19%	23%	21%	20%
None of the above	13%	12%	9%	17% CH
Prohibited to use certain tools	11%	16%	15%	14%
Other (please specify)	3%	4%	0%	3%
Prohibited to use it in any way	1%	2%	2%	3%



Around a third don't know if their institution has restrictions in place on the use of AI, with this being more common among women



Select: all that apply

	Researchers N= 2284	Men N= 1464	Women N= 692
Don't know / not sure	31%	29%	35% • м
Prohibited to upload confidential information into public generative Al platforms	28%	29%	25%
Lack of budget to pay for AI products or features	25%	25%	24%
Prohibited to use it for certain purposes	19%	20% w	16%
None of the above	13%	13%	12%
Prohibited to use certain tools	11%	12%	10%
Other (please specify)	3%	2%	3%
Prohibited to use it in any way	1%	1%	2%

Significantly higher/ lower than...

Significantly higher than..

Researchers who have been active their area of work 5 years or less think not uploading confidential information to generative AI platforms is the biggest restriction on AI usage imposed by their institution



	Researchers N= 2284	Years ≤5 Active: N= 277	_	-10 = 418	_	1-35 = 418		36+ N= 167	
Don't know / not sure	31%	28%		33%		30%		35%	
Prohibited to upload confidential information into public generative Al platforms	28%	36%	1 1-35 36+	31%	11-35 36+	26%	36+	17%	•
Lack of budget to pay for Al products or features	25%	23%		28%	≤5	26%		23%	
Prohibited to use it for certain purposes	19%	23%	36+	21%	36+	18%	36+	12%	•
None of the above	13%	10%		11%		15%	≤5	18%	6 -10 ≤5
Prohibited to use certain tools	11%	14%	36+	16%	1-35 36+	11%	36+	6%	•
Other (please specify)	3%	1%	•	1%	•	3%	6-10 ≤5	7%	6-10 11-35 ≤5
Prohibited to use it in any way	1%	2%		1%		1%		1%	

Lack of budget is the biggest institutional restriction on the use of Al for researchers in lower-middle-income countries



Base: n= 2284

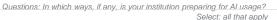
	Researchers N= 2284	High Income N= 1172	Upper- Middle-Income N= 787	Lower- Middle-Income N= 271
Don't know / not sure	31%	31%	32% LM	26%
Prohibited to upload confidential information into public generative AI platforms	28%	30% LM	27%	24%
Lack of budget to pay for AI products or features	25%	20%	28% н	37% • HI
Prohibited to use it for certain purposes	19%	21% LM	17%	16%
None of the above	13%	13%	12%	13%
Prohibited to use certain tools	11%	12%	13% LM	8%
Other (please specify)	3%	4% • um	1%	3%
Prohibited to use it in any way	1%	1%	1%	2%

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

Researchers generally are unaware of any institutional plans to prepare for Al usage, the most common preparation is setting up a community of practice (1/2)



	Researchers 1/2 N= 2284	Asia Pacific N= 745	Europe N= 758	North America N= 347	South America N= 234	Middle East & Africa N= 165
Don't know / not sure	44%	43%	44%	45%	45%	38%
Setting up a community of practice around it	17%	17%	sa 17%		AP EU SA MEA	17% SA
Building a plan/protocol to evaluate the purchase of tools that include it	15%	18%	EU SA MEA	15%	sa 9%	13%
Providing ethics courses	15%	16%	EU 12%	16%	_{EU} 12%	16%
Planning to acquire tools that include it (within 2024 o before)	r 13%	14%	sa 12%	SA 14%	sa 7%	12%



Base: n= 2284

Significantly higher/lower than...

Significantly higher than...

Researchers generally are unaware of any institutional plans to prepare for Al usage, the most common preparation is setting up a community of practice (2/2)



	Researchers 2/2 N= 2284	Asia Pacific N= 745	_	Europe N= 758	_	lorth America = 347	-	South Ame N= 234	rica	Middle East N= 165	& Africa
None of the above	12%	8%	•	16%	• AP NA	11%		21%	• A N ME	13%	AP
Adding a position around it to your documentation (e.g. annual plan, mission, charter etc.)	11%	15%	EU NA SA MEA	8%	•	10%	SA	6%	•	7%	
Appointing new operational functions around it (e.g. GenAl Librarian etc.)	10%	13%	EU SA MEA	8%	SA	10%	SA	1%	•	5%	SA
Appointing new leadership around it (e.g. Chief Al Officer etc.)	7%	8%	EU SA	6%	SA	8%	SA	3%	•	8%	SA
Other (please specify)	2%	1%	•	2%	AP	5%	AP EU	6%	• A E ME		



Base: n= 2284

Global

Researchers in China are more likely to be unsure how their institution is preparing for AI usage (1/2)



1/2	Researchers N= 2284	USA N= 298	China N= 311	India N= 101	_
Don't know / not sure	44%	46% IN	49%	29%	_
Setting up a community of practice around it	17%	23%	10%	30% • cr	Н
Building a plan/protocol to evaluate the purchase of tools that include it	15%	16%	19%	22%	
Providing ethics courses	15%	16%	14%	21%	Н
Planning to acquire tools that include it (within 2024 or before)	13%	14%	13%	20%	Н

Base: n= 2284

Researchers in China are more likely to be unsure how their institution is preparing for AI usage (2/2)



2/2	Researchers N= 2284	USA N= 298	China N= 311		India N= 101	
None of the above	12%	10%	7%	•	11%	
Adding a position around it to your documentation (e.g. annual plan, mission, charter etc.)	11%	10%	21%	IN US	9%	
Appointing new operational functions around it (e.g. GenAl Librarian etc.)	10%	10%	13%	•	13%	
Appointing new leadership around it (e.g. Chief Al Officer etc.)	7%	7%	5%		13%	CH US
Other (please specify)	2%	4% • сн	0%	•	3%	CH



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

Most commonly, researchers are unaware of any institutional plans to prepare for AI usage – little difference between men and women (1/2)



	1/2	Researchers N= 2284	Men N= 1464	Women N= 692
Don't know / not sure		44%	44%	43%
Setting up a community of practice around it		17%	18%	15%
Building a plan/protocol to evaluate the purchasit	se of tools that include	15%	16%	15%
Providing ethics courses		15%	14%	16%
Planning to acquire tools that include it (within 2	2024 or before)	13%	13%	13%



Base: n= 2284

Most commonly, researchers are unaware of any institutional plans to prepare for AI usage – little difference between men and women (2/2)



2/2	Researchers N= 2284	Men N= 1464	Women N= 692
None of the above	12%	11%	13%
Adding a position around it to your documentation (e.g. annual plan, mission, charter etc.)	11%	12%	10%
Appointing new operational functions around it (e.g. GenAl Librarian etc.)	10%	9%	10%
Appointing new leadership around it (e.g. Chief Al Officer etc.)	7%	7%	7%
Other (please specify)	2%	1%	• 3% • M



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

Researchers are generally unaware of any institutional plans to prepare for Al usage, particularly so among researchers active 6-10 years in their area of work (1/2)



	1/2	Researchers N= 2284	Years ≤5 Active: N= 277	6-10 N= 418	11-35 N= 418	36+ N= 167	
Don't know / not sure		44%	40%	48%	≤5 11-35 41%	50% 1	11-35 ≤5
Setting up a community of practic	ce around it	17%	15%	18%	18%	17%	
Building a plan/protocol to evaluation to that include it	ate the purchase of	15%	14%	15%	15%	11%	
Providing ethics courses		15%	15%	16%	36+ 14%	10%	
Planning to acquire tools that inc before)	lude it (within 2024 or	13%	12%	11%	13%	14%	



Base: n= 2284

Researchers are generally unaware of any institutional plans to prepare for Al usage, particularly among researchers active 6-10 years in their area of work (2/2)



2/2	Researchers N= 2284	Years ≤5 Active: N= 277	6-10 N= 418	11-35 N= 418	36+ N= 167
None of the above	12%	14%	6-10 9%	14%	6-10 11%
Adding a position around it to your document (e.g. annual plan, mission, charter etc.)	ation 11%	15%	• 6-10 36+ 9%	11%	36+ 6%
Appointing new operational functions around GenAl Librarian etc.)	it (e.g. 10%	13%	6-10 1-35 36+	36+ 9%	36+ 5%
Appointing new leadership around it (e.g. Chi Officer etc.)	ef AI 7%	6%	7%	7%	6%
Other (please specify)	2%	2%	2%	3%	3%



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

Select: all that apply

Base: n= 2284

Lower-middle-income researchers have greatest awareness of institutional plans for AI usage and a quarter are setting up a community of practice (1/2)



1/2	Researchers N= 2284	High Income N= 1172		Upper- Middle-Incon N= 787	ne	Lower- Middle-Inco	ome
Don't know / not sure	44%	45%	LM	46%	LM	33%	•
Setting up a community of practice around it	17%	20%	UM	11%	•	25%	• UM
Building a plan/protocol to evaluate the purchase of tools that include it	15%	14%		15%		19%	• ні
Providing ethics courses	15%	16%	UM	12%		17%	UM
Planning to acquire tools that include it (within 2024 or before)	13%	13%	UM	11%	•	18%	• HI UM

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

Lower-middle-income researchers have greatest awareness of institutional plans for AI usage and a quarter are setting up a community of practice (2/2)



2/2	Researchers N= 2284	High Income N= 1172	Upper- Middle-Income N= 787	Lower- Middle-Income N= 271
None of the above	12%	12%	13%	11%
Adding a position around it to your documentation (e.g. annual plan, mission, charter etc.)	11%	9%	14%	10%
Appointing new operational functions around it (e.g. GenAl Librarian etc.)	10%	9%	10%	11%
Appointing new leadership around it (e.g. Chief Al Officer etc.)	7%	7% UI	^M 5%	10% • UM
Other (please specify)	2%	3%	2%	2%

3. Perceptions of Al

Theme 3



Perceptions of Al

What are your overall feelings about the impact of AI on your area of work?	Slide 54
What do you think will be the level of impact of AI in your area of work in the near future?	Slide 59
To what extent, if at all, do you have concerns about the ethical implications of AI in your area of work?	Slide 64
You mentioned that you had concerns, what do you think are the top 3 disadvantages of AI?	Slide 69
Thinking about the impact AI will have on society and your work, to what extent do you think over the next 2 to 5 years it will?	Slide 84
Thinking about the use of generative AI in your area of work, how much do you agree or disagree with the following?	Slide 94
To what extent, if at all, would the following factors increase your trust in tools that utilize generative AI?	Slide 99
Which information areas about a tool's dependency on generative AI would most increase your comfort in using that tool?	Slide 104
Would you prefer any generative AI functionality included in a product you use already to be?	Slide 114



Most have mixed feelings about the impact of AI on their work. More researchers in Europe and North America have mixed views while APAC are the most positive. Few are across regions are negative



	Researchers N= 2284	Asia Pacific N= 745	Europe N= 758	_	North America N= 347	South America N= 234	Middle East & A	Africa
Positive – it's a welcome advancement	41%	47%	EU NA SA	•	31%	38%	NA 42%	EU NA
Mixed - I can see both potential and drawbacks	48%	43%	53%	AP MEA	57% • ME	53% _M	AP JEA 42%	
Unsure – I need to see how this develops	10%	9%	12%	NA SA	8%	7%	13%	NA SA
Negative – I see mostly drawbacks	1%	0%	2%	AP	4%	NP SA 2%	AP 2%	AP

Research



Researchers in the USA are more likely to have mixed feelings about the impact of AI on their area of work than globally



	Researchers N= 2284	USA N= 298		China N= 311		India N= 101	
Positive – it's a welcome advancement	41%	30%	•	52%	• IN US	42%	US
Mixed - I can see both potential and drawbacks	48%	57%	• CH IN	38%	•	44%	
Unsure – I need to see how this develops	10%	8%		9%		14%	US
Negative – I see mostly drawbacks	1%	4%	СН	0%		1%	

Women working in research are more likely to feel mixed about the impact of AI on their area of work than men



	Researchers N= 2284	Men N= 1464	Women N= 692
Positive – it's a welcome advancement	41%	45% • v	31%
Mixed - I can see both potential and drawbacks	48%	44%	56% • м
Unsure – I need to see how this develops	10%	9%	11%
Negative – I see mostly drawbacks	1%	1%	2%

Researchers who are 6-10 years active in their area of work are more likely to feel positive about the impact of AI on their area of work than average



	Researchers N= 2284	Years ≤5 Active: N= 277	_	6-10 N= 418	11-35 N= 418	-	36+ N= 167
Positive – it's a welcome advancement	41%	42%	36+	45% • 11-3	38%		34%
Mixed - I can see both potential and drawbacks	48%	48%		48%	50%		47%
Unsure – I need to see how this develops	10%	9%	6-10	6%	10%	6-10	18% • 6-10 11-35 ≤5
Negative – I see mostly drawbacks	1%	1%		1%	2%		2%

Significantly higher than...

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

Researchers in upper-middle-income countries are more likely to feel positive about the impact of AI on their area of work than average



	Researchers N= 2284	High Income N= 1172	Upper- Middle-Income N= 787	Lower- Middle-Income N= 271
Positive – it's a welcome advancement	41%	36%	46% • н	40%
Mixed - I can see both potential and drawbacks	48%	52% • LM	43%	47%
Unsure – I need to see how this develops	10%	10%	10%	12%
Negative – I see mostly drawbacks	1%	2%	1%	1%

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



Nearly three quarters of researchers think the level of impact will be transformative or significant. Researchers in APAC are most likely to think AI will be transformative, Europe least likely



	Researchers N= 2284	Asia Pacific N= 745	Europe N= 758		North Ame N= 347		South Americ N= 234		Middle East	& Africa
Transformative (i.e. it will make a marked change)	28%	33%	eu NA SA	•	27%	EU	25%	EU	29%	EU
Significant (i.e. a notable change)	44%	44%	44%)	39%	•	48%	NA	52%	O AP EU NA
Some (i.e. a partial change)	21%	18%	●MEA 28%	AP SA MEA	25%	AP MEA	21%	MEA	11%	•
Low (i.e. a small change)	4%	2%	• 5%	• AP SA	5%	• AP SA	2%		4%	
None (i.e. no change at all)	0%	0%	0%	AP	1%	AP	0%		1%	AP
Don't know/ not sure	3%	2%	3%		2%		4%		4%	
Sum of Transformative + Significant - excluding 'don't know / not sure' answers	74%	79%	● EU 65%	•	68%	•	76%	EU NA	84%	EU NA SA



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

Researchers in China are more likely to think the impact of AI will be transformative. Researchers in the USA are less likely to think it will be significant or transformative than the global average



	Researchers N= 2284	USA N= 298		China N= 311		India N= 101	
Transformative (i.e. it will make a marked change)	28%	27%		37%	US	29%	
Significant (i.e. a notable change)	44%	38%	•	38%	•	50%	CH US
Some (i.e. a partial change)	21%	27%	• IN	21%		14%	•
Low (i.e. a small change)	4%	5%	СН	1%	•	3%	
None (i.e. no change at all)	0%	1%	• сн	0%		0%	
Don't know/ not sure	3%	2%		2%		4%	
Sum of Transformative + Significant - excluding 'don't know / not sure' answers	74%	66%	•	77%	US	82%	• US



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

Women working in research are less likely to think the impact of AI will be transformative than men



	Researchers N= 2284	Men N= 1464	Women N= 692
Transformative (i.e. it will make a marked change)	28%	29% v	25%
Significant (i.e. a notable change)	44%	44%	46%
Some (i.e. a partial change)	21%	20%	23%
Low (i.e. a small change)	4%	3%	4%
None (i.e. no change at all)	0%	0%	0%
Don't know/ not sure	3%	3%	3%
Sum of Transformative + Significant - excluding 'don't know / not sure' answers	74%	73%	76%

Research

Researchers who have been active in their area of work for 36+ years are least likely to think AI will be transformative



	Researchers N= 2284	Years ≤5 Active: N= 277	6-10 N= 418	11-35 N= 418	36+ N= 167	
Transformative (i.e. it will make a marked change)	28%	30%	36+ 28%	36+ 27%	36+ 20%	•
Significant (i.e. a notable change)	44%	45%	47%	43%	43%	
Some (i.e. a partial change)	21%	20%	21%	23%	25%	
Low (i.e. a small change)	4%	3%	3%	4%	6%	6-10
None (i.e. no change at all)	0%	0%	0%	0%	1%	
Don't know/ not sure	3%	2%	1%	3%	6-10 4%	6-10
Sum of Transformative + Significant - excluding 'don't know / not sure' answers	74%	74%	36+ 74%	36+ 73%	36+ 65%	•



Researchers in lower-middle-income countries are most likely to believe Al will be transformative or significant in their area of work



Base: n= 2284

	Researchers N= 2284	High Income N= 1172	Upper- Middle-Income N= 787	Lower- Middle-Income N= 271
Transformative (i.e. it will make a marked change)	28%	26%	30% н	31% н
Significant (i.e. a notable change)	44%	45%	41%	50% • им
Some (i.e. a partial change)	21%	23% LM	23%	12%
Low (i.e. a small change)	4%	4% UM	3%	3%
None (i.e. no change at all)	0%	0%	0%	0%
Don't know/ not sure	3%	2%	3%	4%
Sum of Transformative + Significant - excluding 'don't know / not sure' answers	1 %	72%	73%	84% • HI

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



Significantly higher than...

Most researchers have some concerns about AI. Researchers in APAC are less likely to have significant or fundamental concerns



	Researchers N= 2284	Asia Pacific N= 745		Europe l= 758	_	lorth Amer = 347		South Amer N= 234	ica	Middle East & N= 165	Africa
No concerns	11%	12%	NA SA	11%	NA	7%	•	8%		11%	
Some concerns	50%	58%	NA SA MEA	42%	•	44%	•	38%	•	49%	EU SA
Significant concerns	25%	19%	•	30%	• AP	33%	AP MEA	33%	• AI	P _A 24%	
Fundamental concerns	11%	7%	•	14%	• AP	14%	AP	18%	• AI	10%	
Don't know/ not sure	4%	4%		3%		3%		3%		6%	EU

Research

Researchers in China are less likely to have significant or fundamental concerns about the ethical implications of AI on their area of work



	Researchers N= 2284	USA N= 298		China N= 311		India N= 101	
No concerns	11%	7%	•	18%	•	us 13%	US
Some concerns	50%	43%	•	65%	•	IN 40%	•
Significant concerns	25%	33%	CH	9%	•	33%	СН
Fundamental concerns	11%	14%	СН	5%	•	10%	СН
Don't know/ not sure	4%	3%		3%		5%	



Women working in research are more likely to have concerns about the ethical implications of AI on their area of work than men



	Researchers N= 2284	Men N= 1464	Women N= 692
No concerns	11%	12% w	7%
Some concerns	50%	52% w	47%
Significant concerns	25%	23%	32% • M
Fundamental concerns	11%	10%	11%
Don't know/ not sure	4%	4%	3%

Research

Researchers who've been in their area of work for 6-10 years are less likely to have any concerns about the ethical implications of Al than average



	Researchers N= 2284	Years ≤5 Active: N= 277	6-10 N= 418	11-35 N= 418	36+ N= 167	
No concerns	11%	11%	15%	• ₁₁₋₃₅ 8%	14%	11-35
Some concerns	50%	52%	11-35 56	% ● ¹¹⁻³⁵ 36+ 45%	44%	
Significant concerns	25%	24%	6-10 17%	30%	● ⁶⁻¹⁰ ≤5 27%	6-10
Fundamental concerns	11%	11%	10%	12%	11%	
Don't know/ not sure	4%	3%	2%	4%	6-10 3%	

Researchers in upper-middle-income countries are less likely to have any concerns about the ethical implications of AI on their area of work than average



	Researchers N= 2284	High Income N= 1172		Upper- Middle-Inco	me	Lower- Middle-Incor N= 271	me
No concerns	11%	7%	•	15%	• н	11%	НІ
Some concerns	50%	48%		54%	• H	45%	
Significant concerns	25%	29%	UM	19%	•	27%	UM
Fundamental concerns	11%	13%	• UM	9%	•	10%	
Don't know/ not sure	4%	3%		4%		6%	• ні

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



Base: n= 2284

Those researchers with concerns about AI believe its inability to replace human judgment and empathy is its greatest drawback, this is tied with concerns about governance. Inability to replace human judgment greatest concern in Middle East and Africa. Governance concern highest in South America (1/3)



Base: n= 1963

1/3	Researchers N= 1963	Asia Pacific N= 626	Europe N= 654	North America N= 312	South America N= 208	Middle East & Africa N= 137
Does not have enough regulation or governance	39%	40%	36%	38%	50%	AP EU NA NA
Unable to replace human creativity, judgment and/or empathy	39%	38%	38%	42%	38%	48% • AP EU SA
Lack of accountability over the use of generative Al outputs	32%	33%	MEA 31%	MEA 32%	MEA 36%	1EA 23%
Outputs are factually incorrect and/or non-sensical (hallucinations)	25%	26%	SA MEA 26%	SA MEA 37%	AP EU SA MEA	14%
Outputs can be discriminatory or biased	25%	20%	30%	AP MEA 34%		19% MEA
Too dependent on outdated data and/or information	21%	23%	NA SA MEA	NA SA MEA	16%	14%



Those researchers with concerns about AI believe its inability to replace human judgment and empathy is its greatest drawback, tied with concerns about governance. Homogeneity more of a concern in Europe and South America vs other regions (2/3)



	Researchers 2/3 N= 1963	Asia Pacific N= 626	Eur N= 6	r ope 654		lorth Amer = 312	ica	South Ame N= 208		Middle East N= 137	& Africa
The logic behind an output is not well described	20%	20%	SA	23%	NA SA	18%		13%	•	18%	
Risks homogenizing culture via its use of global models	17%	14%	•	22%	AP NA MEA	14%		26%	NA MEA	15%	
Lack of relevant expertise within organisation	15%	15%	NA	15%	NA	10%	•	21%	• AF	20%	NA
Lack of permission to use data or information AI tools are trained on	14%	14%		12%		16%	SA	10%		20%	• AP EU SA
Generative AI inputs/prompts are not confidential	12%	16%	EU NA MEA	9%	•	6%	•	13%	EU NA	10%	NA
Generative AI outputs are not confidential	10%	11%	EU NA	7%	•	7%	•	10%		16%	EU NA SA

Global

Those researchers with concerns about AI believe its inability to replace human judgment and empathy is its greatest drawback, tied with concerns about governance. Requiring a lot of computer processing power a greater concern in Middle East and Africa (3/3)



Base: n= 1963

	Researchers 3/3 N= 1963	Asia Pacific N= 626	Europe N= 654	North America N= 312	South America N= 208	Middle East & Africa N= 137
Requires a lot of computer processing power	8%	8%	9%	6%	6%	15% PEU NA SA
Generative AI discriminates against non-native English speakers	7%	8%	_{NA} 7%	NA 3%	5%	8% NA
Other	2%	1%	2%	3%	3%	1%
Don't know/ not sure	1%	1%	1%	2%	_{EU} 1%	0%
None of the above	0%	0%	0%	0%	0%	1%

Global

The most common disadvantage of AI in the most populous countries is its inability to replace human qualities, most felt among researchers in India (1/3)



1/3	Researchers N= 1963	USA N= 268	China N= 245	India N= 83
Does not have enough regulation or governance	39%	36%	40%	IN 30%
Unable to replace human creativity, judgment and/or empathy	39%	43%	43%	57% • CH
Lack of accountability over the use of generative AI outputs	32%	32%	32%	41%
Outputs are factually incorrect and/or non-sensical (hallucinations)	25%	38% • CF	25%	^{IN} 12%
Outputs can be discriminatory or biased	25%	34% • CF	13%	20%
Too dependent on outdated data and/or information	21%	16%	27%	us 11%

The most common disadvantage of AI in the most populous countries is its inability to replace human qualities, homogeneity is less of a concern in the USA compared to the global average (2/3)



2/3	Researchers N= 1963	USA N= 268	China N= 245	India N= 83	
The logic behind an output is not well described	20%	19%	18%	16%	
Risks homogenizing culture via its use of global models	17%	13%	19%	us 14%	
Lack of relevant expertise within organisation	15%	9%	10%	• 17%	US
Lack of permission to use data or information AI tools are trained on	14%	15%	16%	13%	
Generative Al inputs/prompts are not confidential	12%	5%	18%	• us 11%	US
Generative Al outputs are not confidential	10%	7%	13%	^{US} 13%	US

The most common disadvantage of AI in the most populous countries is its inability to replace human qualities, Indian researchers are more worried about demands on computer processing power compared to the USA and China (3/3)

3/3	Researchers N= 1963	US N= 268	China N= 245	India N= 83
Requires a lot of computer processing power	8%	6%	5%	13% CH
Generative AI discriminates against non-native English speakers	7%	4%	7%	6%
Other	2%	3% сн	0%	1%
Don't know/ not sure	1%	2%	1%	1%
None of the above	0%	0%	0%	0%

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

Women are more likely to be concerned over lack of accountability than men, among other concerns, in the use of AI (1/3)



Select: up to three

Base: n= 1963

1/3	Researchers N= 1963	Men N= 1235	Women N= 622
Does not have enough regulation or governance	39%	40%	39%
Unable to replace human creativity, judgment and/or empathy	39%	37%	42% M
Lack of accountability over the use of generative AI outputs	32%	30%	36% ● м
Outputs are factually incorrect and/or non-sensical (hallucinations)	25%	26%	23%
Outputs can be discriminatory or biased	25%	23%	28% M
Too dependent on outdated data and/or information	21%	22%	19%

Global

Women are more likely to be concerned over lack of accountability than men, among other concerns, in the use of AI (2/3)



Base: n= 1963

2/3	Researchers N= 1963	Men N= 1235	Women N= 622	
The logic behind an output is not well described	20%	22%	w 15%	•
Risks homogenizing culture via its use of global models	17%	18%	17%	
Lack of relevant expertise within organisation	15%	16%	14%	
Lack of permission to use data or information AI tools are trained o	n 14%	14%	14%	
Generative Al inputs/prompts are not confidential	12%	11%	14%	М
Generative AI outputs are not confidential	10%	9%	11%	

Global

Women are more likely to be concerned over lack of accountability than men, among other concerns, in the use of AI (3/3)



Select: up to three

Base: n= 1963

3/3	Researchers N= 1963	Men N= 1235	Women N= 622	
Requires a lot of computer processing power	8%	9%	w 6%	
Generative AI discriminates against non-native English speakers	7%	7%	6%	
Other	2%	2%	1%	
Don't know/ not sure	1%	1%	1%	
None of the above	0%	0%	0%	

Global

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

Those researchers with concerns about AI believe its inability to replace human judgement and empathy is its greatest drawback, tied with concerns about governance, little variation by years active in role across top concerns (1/3)



Base: n= 1963

1/3	Researchers N= 1963	Years ≤5 Active: N= 238	6-10 N= 349	11-35 N= 349	36+ N= 137
Does not have enough regulation or governance	39%	34%	41%	≤5 40%	42%
Unable to replace human creativity, judgment and/or empathy	39%	43%	40%	39%	36%
Lack of accountability over the use of generative Al outputs	32%	34%	6-10 26%	• 34%	6-10 28%
Outputs are factually incorrect and/or non-sensical (hallucinations)	25%	28%	30%	25%	25%
Outputs can be discriminatory or biased	25%	23%	28%	26%	30%
Too dependent on outdated data and/or information	21%	21%	23%	19%	19%

Global

Those researchers with concerns about AI believe its inability to replace human judgement and empathy is its greatest drawback, tied with concerns about governance. Those active is their area of work for less than 10 years are more concerned about confidentiality of prompts (2/3)



2/3	Researchers N= 1963	Years ≤5 Active: N= 238	6-10 N= 349	11-35 N= 349	36+ N= 137
The logic behind an output is not well described	20%	18%	19%	21%	22%
Risks homogenizing culture via its use of global models	17%	15%	14%	19%	23% 6-10 55
Lack of relevant expertise within organisation	15%	14%	11%	• 17%	6-10 14%
Lack of permission to use data or information AI tools are trained on	14%	16%	11%	14%	11%
Generative AI inputs/prompts are not confidential	12%	16% 1 1-3	16%	11-35 36+ 9%	6%
Generative AI outputs are not confidential	10%	12%	10%	9%	7%

Those researchers with concerns about AI believe its inability to replace human judgement and empathy is its greatest drawback, tied with concerns about governance (3/3)



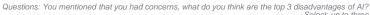
3/3	Researchers N= 1963	Years ≤5 Active: N= 238	6-10 N= 349	11-35 N= 349	36+ N= 137	
Requires a lot of computer processing power	8%	7%	7%	8%	7%	
Generative AI discriminates against non-native English speakers	7%	7%	6%	7%	7%	
Other	2%	2%	2%	1%	4%	11-35
Don't know/ not sure	1%	1%	1%	1%	2%	
None of the above	0%	0%	0%	0%	1%	

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

Researchers in lower-middle-income countries are more likely to believe Al's inability to replace human judgement and empathy is its greatest drawback than average (1/3)



1/3	Researchers N= 1963	High Income N= 1056		Upper- Middle-Income N= 643	9	Lower- Middle-Inco	me
Does not have enough regulation or governance	39%	40%	LM	41%	LM	33%	•
Unable to replace human creativity, judgment and/or empathy	39%	35%	•	41%	HI	48%	• HI UM
Lack of accountability over the use of generative Al outputs	32%	32%		32%		34%	
Outputs are factually incorrect and/or non-sensical (hallucinations)	25%	31%	• LM UM	21%	L M	14%	•
Outputs can be discriminatory or biased	25%	30%	● LM UM	20%		20%	•
Too dependent on outdated data and/or information	21%	20%	LM	24%	HI LM	15%	•



Researchers in lower-middle-income countries are more likely to believe Al's inability to replace human judgement and empathy is its greatest drawback than average, and are more concerned about a lack of relevant expertise than the global average (2/3)



2/3	Researchers N= 1963	High Income N= 1056	Upper- Middle-Income N= 643	Lower- Middle-Income N= 226
The logic behind an output is not well described	20%	24% • LN	17%	15%
Risks homogenizing culture via its use of global models	17%	16%	21%	12%
Lack of relevant expertise within organisation	15%	13%	14%	22% • HI
Lack of permission to use data or information AI tools are trained on	14%	13%	14%	17%
Generative Al inputs/prompts are not confidential	12%	10%	15%	12%
Generative AI outputs are not confidential	10%	7%	12%	14% • H

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

Select: up to three

Researchers in lower-middle-income countries are more likely to believe Al's inability to replace human judgement and empathy is its greatest drawback than average and more likely to think computer processing power is a concern compared to global average (3/3)



3/3	Researchers N= 1963	High Income N= 1056	Upper- Middle-Income N= 643	Lower- Middle-Income N= 226
Requires a lot of computer processing power	8%	7%	8%	14% • HI
Generative AI discriminates against non-native English speakers	7%	6%	7%	7%
Other	2%	3% UM	1%	1%
Don't know/ not sure	1%	1%	1%	1%
None of the above	0%	0%	0%	0%

Research

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

94% think AI will help accelerate knowledge discovery at least to some extent. Researchers in North America are the least likely to expect these listed benefits (1/2)



1/2 - Positive Impacts

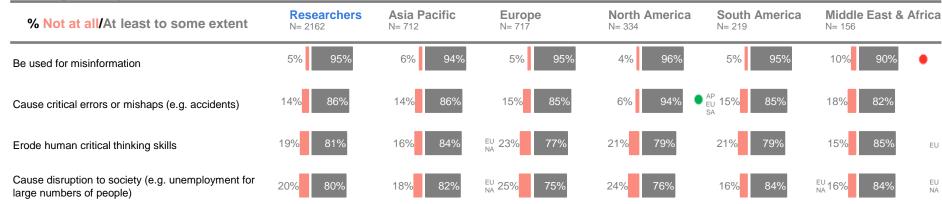


86% think AI has the potential to cause critical errors, higher still in North America (2/2)



Base: n= 2162

2/2 - Negative Impacts



Researchers in the USA are less likely to think AI will bring almost all of the following benefits (at least to some extent) than globally. Researchers in China are more optimistic (1/2)



1/2 - Positive Impacts

% Not at all/At least to some extent	Researchers	USA	China	India	
76 Not at an At least to some extent	N= 2202	N= 288	N= 309	N= 100	
Change the way students are taught and study in universities and medical schools	3% 97%	3% 97%	2% 98%	3% 97%	
Accelerate knowledge discovery	6% 94%	10% 90%	• 1% 99%	● US 5% 95%	
Rapidly increase the volume of scholarly and medical research	8% 92%	15% 85%	6 4% 96%	ous 7% 93%	US
Provide cost savings to institutions and businesses	8% 92%	14% 86%	98%	us 5% 95%	US
Increase your work efficiency	9% 91%	18% 82%	• 1% 99%	US 7% 93%	US
Increase your work quality	14% 86%	30% 70%	96%	US 4% 96%	US
Free your time for higher value work	15% 85%	26% 74%	5% 95%	US 11% 89%	US
Increase your work consistency	19% 81%	38% 62%	6% 94%	US14% 86%	US
Increase collaboration	26% 74%	48% 52%	6% 94%	^{US} 9% 91%	US

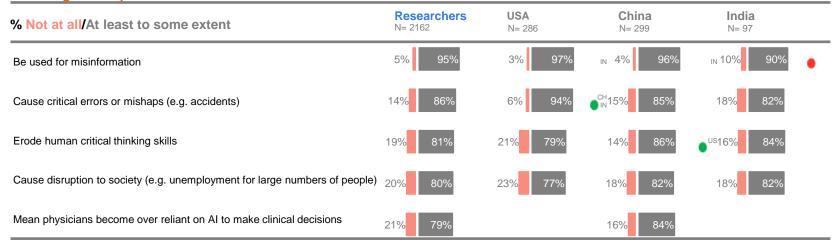


Questions: Thinking about the impact AI will have on society and your work, to what extent do you think over the next 2 to 5 years it will ...? Scale: A great extent, some extent, not at all, don't know/not sure (bottom box and top 2 box excl. don't know) Base: n= 2202

Researchers in the USA are more likely to think AI has the potential to cause mishaps and disruption than average (2/2)



2/2 - Negative Impacts

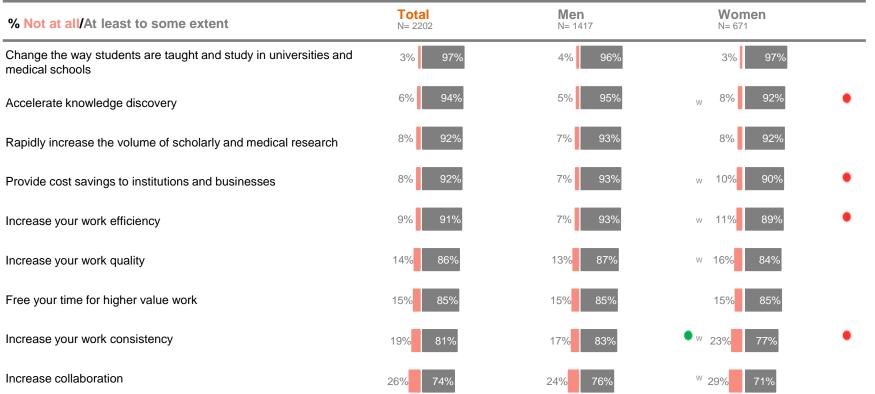


Role/Region/ Country (indicated by first two letters e.g. AP = APAC)

The vast majority believe AI will have a positive impact to some extent, but it is slightly lower amongst women (1/2)



1/2 - Positive Impacts





■ Global

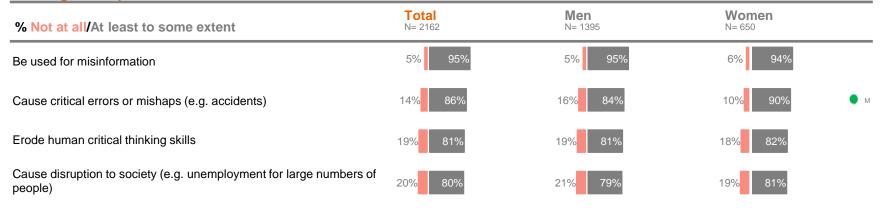
Questions: Thinking about the impact AI will have on society and your work, to what extent do you think over the next 2 to 5 years it will...?

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

The vast majority also believe AI has the potential to have a negative impact with women more likely to believe it may cause errors (2/2)



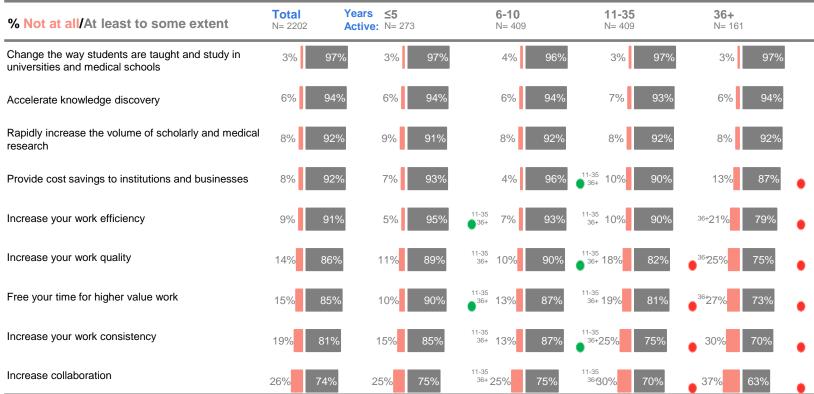
2/2 - Negative Impacts



The vast majority believe AI will have a positive impact to some extent but researchers who've been in their area of work longest (36+ years active) are least likely to expect benefits (1/2)



1/2 - Positive Impacts



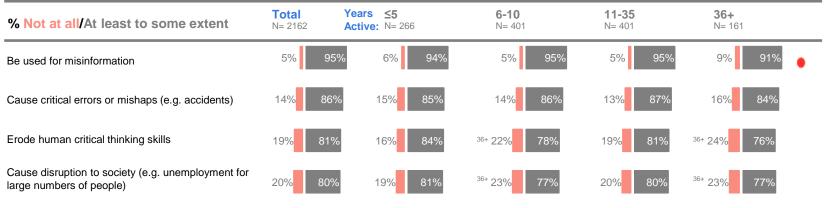


Questions: Thinking about the impact Al will have on society and your work, to what extent do you think over the next 2 to 5 years it will ...? Scale: A great extent, some extent, not at all, don't know/not sure (bottom box and top 2 box excl. don't know) Global Base: n= 2202 Role/Region/ Country (indicated by first two letters e.g. AP = APAC)

95% believe AI has the potential to be used for misinformation, but researchers with 36+ years active are less likely to believe this (2/2)



2/2 - Negative Impacts





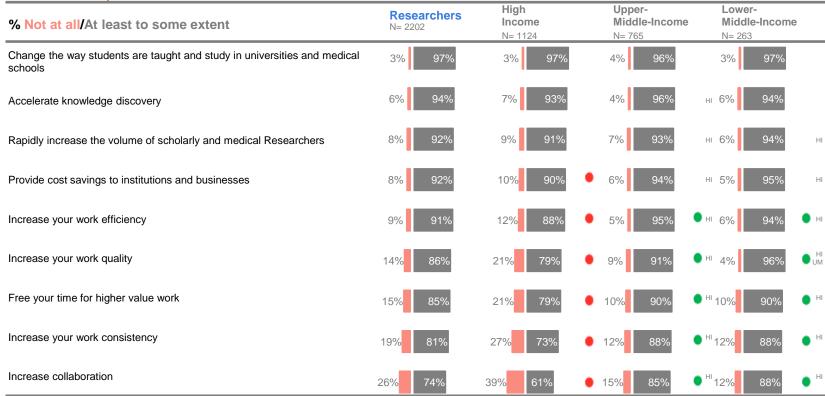
Role/Region/ Country (indicated by first two letters e.g. AP = APAC)

Belief in positive AI impacts are high, but researchers in high income countries are least likely to expect these benefits (1/2)



1/2 - Positive Impacts

Research





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= 2202

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 ...?

Researchers in lower-middle income countries least likely to believe AI has the potential to be used for misinformation or cause critical errors than average (2/2)



2/2 - Negative Impacts

% Not at all/At least to some extent	Researchers N= 2162	High Income N= 1117	Upper- Middle-Income N= 745	Lower- Middle-Income N= 259	
Be used for misinformation	5% 95%	4% 96%	●UM 5% 95%	_{LM} 10% 90%	
Cause critical errors or mishaps (e.g. accidents)	14% 86%	11% 89%	● ^{UM} 16% 84%	17% 83%	
Erode human critical thinking skills	19% 81%	20% 80%	18% 82%	15% 85%	НІ
Cause disruption to society (e.g. unemployment for large numbers of people)	20% 80%	22% 78%	20% 80%	15% 85% • 0	HI UM

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/not sure)

Base: n = 2162

Most expect to be informed when a tool they use depends on generative AI, many also expect AI to be paired with human expertise, those in South America place more emphasis on being informed when a tool depends on generative Al



% Disagree/Agree	Researchers N= 2210	Asia Pacific N= 718	Europe N= 737	North America N= 336	South America N= 226	Middle East & Africa N= 161
to be informed whether the tools I use depend on generative AI	6% 81%	5% 80%	8%	81% 6% 80%	4% 88%	AP EU 5% NA 84%
generative AI to always be paired with human expertise (i.e. qualified people validate outputs)	9% 81%	7% 81%	NA 9%	81% 15% 77%	10% 81%	6% 79%
to be informed if the peer-review recommendations I receive about my manuscript utilized generative AI, even if alongside human oversight	8% 78%	8% 74%	9%	80% AP 8% 81%	AP 5% 88%	AP EU I NA 9% 75% MEA
to be given a choice to turn off generative AI in the tools that I use	9% 76%	9% 74%	8%	77% 6% 80%	AP 7% 81%	AP 15% 73%
generative AI will work well with non-text modalities (i.e. chemical or biological compounds, chemical reactions, graphs, plans)	10% 72%	7% 7 6%	EU NA 11% SA	69% _{NA} 16% 63%	13% 70%	12% 72% _{NA}
most authors who use generative AI to create the content of a manuscript will not declare that they have	14% 69%	13% 70%	_{NA} 12%	71% NA 17% 62%	23% 64%	16% 70%
generative AI dependent tools' results be based on high quality trusted sources only	6% 68%	5% 7 3%	EU NA 8%	63% 6% 59%	4% 72%	EU 5% 73% EU NA

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

Most expect to be informed when a tool they use depends on generative AI, the same amount expect AI to be paired with human expertise, particularly in India



% Disagree/Agree	Research N= 2210	chers	USA N= 288		China N= 301		India N= 96	
to be informed whether the tools I use depend on generative AI	6%	81%	7%	77%	3%	73% 🌘	2%	90% CH
generative AI to always be paired with human expertise (i.e. qualified people validate outputs)	9%	81%	16%	74% 🌘	4%	78%	2%	95% CH
to be informed if the peer-review recommendations I receive about my manuscript utilized generative AI, even if alongside human oversight	8%	78%	8%	80% сн	7%	71%	4%	82% сн
to be given a choice to turn off generative AI in the tools that I use	9%	76%	7%	78%	5%	73%	6%	82% ^{CH}
generative AI will work well with non-text modalities (i.e. chemical or biological compounds, chemical reactions, graphs, plans)	10%	72%	16%	63%	4%	78% • ^{Us}	s 6%	80% ^{US}
most authors who use generative AI to create the content of a manuscript will not declare that they have	14%	69%	17%	62%	14%	66%	11%	74%
generative AI dependent tools' results be based on high quality trusted sources only	6%	68%	8%	56%	3%	82% o U	3 2%	87% US



Significantly higher than . .

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

Most expect to be informed when a tool they use depends on generative AI, the same amount expect AI to be paired with human expertise, expectation for women great than men across both



% Disagree/Agree	Total N= 2210	Men N= 1426	Women N= 671
to be informed whether the tools I use depend on generative AI	6% 81%	6% 79%	4% 8 6% • м
generative AI to always be paired with human expertise (i.e. qualified people validate outputs)	9% 81%	79%	8% 8 3% M
to be informed if the peer-review recommendations I receive about my manuscript utilized generative AI, even if alongside human oversight	78%	9% 75%	6% 83% • _M
to be given a choice to turn off generative AI in the tools that I use	9% 76%	10% 74%	7% 80% • _M
generative AI will work well with non-text modalities (i.e. chemical or biological compounds, chemical reactions, graphs, plans)	10% 72%	9% 73%	11% 70%
most authors who use generative AI to create the content of a manuscript will not declare that they have	14% 69%	14% 69%	16% 69%
generative AI dependent tools' results be based on high quality trusted sources only	68%	68%	4% 71%

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





Base: n= 2210

Most expect to be informed when a tool they use depends on generative Al, the same amount expect AI to be paired with human expertise. Researchers with 36+ years active are less likely than average to expect GenAl tools to be based on high quality and trusted sources only





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= 2210

Researchers in lower-middle-income countries are most likely to expect GenAl to always be paired with human expertise and be informed on GenAl usage within tools



% Disagree/Agree	Resear N= 2210	rchers	High Income N= 1136		Upper- Middle- N= 759	Income	Lower- Middle- N= 264	Income
to be informed whether the tools I use depend on generative AI	6%	81%	8%	81%	4%	79%	3%	88% ● HI UM
generative AI to always be paired with human expertise (i.e. qualified people validate outputs)	9%	81%	13%	78%	5%	80%	4%	90% • HI
to be informed if the peer-review recommendations I receive about my manuscript utilized generative AI, even if alongside human oversight	8%	78%	10%	78%	7%	76%	4%	81%
to be given a choice to turn off generative AI in the tools that I use	9%	76%	10%	75%	7%	76%	8%	79%
generative AI will work well with non-text modalities (i.e. chemical or biological compounds, chemical reactions, graphs, plans)	10%	72%	12%	69%	8%	74%	HI 8%	76% ^{HI}
most authors who use generative AI to create the content of a manuscript will not declare that they have	14%	69%	14%	70%	16%	67%	10%	73%
generative AI dependent tools' results be based on high quality trusted sources only	6%	68%	8%	57%	4%	78% •	н 3%	81% 🌘 ^{HI}

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= 2210 Significantly higher/ lower than...



Using high quality content for models, improving accuracy, transparency, security and governance all strongly increase trust in AI, training an AI model not to be harmful increases trust most, particularly in South America



% No impact/Strongly increase my trust	Researchers N= 2164	Asia Pacific N= 709	Europe N= 715	North America N= 328	South America N= 230	Middle East & Africa N= 155
Training the model to be factually accurate, moral, and not harmful (safety)	8% 57%	6% 56%	10% 56%	9% 61% _м	EU 4%	AP 10% 53% MEA
Only using high-quality peer-reviewed content to train the model (quality model input)	7% 56%	7% 52% 🌘	9% 60% •	AP 8% 56%	5% 66%	AP 4% 60% AP
Citing references by default (transparency)	8% 56%	8% 53%	9% 56%	6% 59%	AP 6% 70%	EU 11% 57% MEA
Keeping the information input confidential (security)	13% 55%	11% 56%	51% 5 1%	16% 49% •	9% 65%	AP EU 9% 57%
Abidance by any laws governing development and implementation (legality)	10% 52%	7% 52%	17% 49% •	10% 54%	3% 68%	EU 11% 49% MEA
Training the model for high coherency outputs (quality model output)	8% 52%	6% 50%	11% 52%	12% 51%	4%	AP EU 7% NA MEA

Using high quality content for models, improving accuracy, transparency, security and governance all strongly increase trust in AI, training an AI model not to be harmful increases trust most, this and security are higher in India



Base: n= 2164

% No impact/Strongly increase my trust	Researchers N= 2164	USA N= 283	China N= 300	India N= 97
Training the model to be factually accurate, moral, and not harmful (safety)	8% 57%	9% 62%	6%	69%
Only using high-quality peer-reviewed content to train the model (quality model input)	7% 56%	8% 56%	9% 51%	3% 62% сн
Citing references by default (transparency)	8% 56%	6% 61%	7% 58%	5%
Keeping the information input confidential (security)	13% 55%	17% 50%	9% 59%	us 10% 69% ous
Abidance by any laws governing development and implementation (legality)	10% 52%	11% 54%	5% 57%	9% 57%
Training the model for high coherency outputs (quality model output)	8% 52%	11% 52%	6% 54%	2% 59%

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) Using high quality content for models, improving accuracy, transparency, security and governance all **strongly increase trust** in AI. Training an AI model not to be harmful, using high quality content, abiding by regulations (legality), keeping information confidential would increase trust more so among women



% No impact/Strongly increase my trust	Total N= 2164	Men N= 1397	Women N= 659
Training the model to be factually accurate, moral, and not harmful (safety)	8% 57%	8% 56%	6% 62% • _M
Only using high-quality peer-reviewed content to train the model (quality model input)	7% 56%	7% 54%	8% 62% • _M
Citing references by default (transparency)	8% 56%	8% 55%	7% 59% _M
Keeping the information input confidential (security)	13% 55%	14% 52%	• 11% 60% • _M
Abidance by any laws governing development and implementation (legality)	10% 52%	11% <mark>49%</mark>	● 7% 60% ● _M
Training the model for high coherency outputs (quality model output)	52%	51%	8% 55%

Using high quality content for models, improving accuracy, transparency, security and governance all **strongly increase trust** in Al. Confidentiality more of a concern amongst researchers who have been active in their role less than 5 years



% No impact/Strongly increase my trust	Total N= 2164	Years Active	≤5 N= 270		6-10 N= 401		11-35 N= 401		36+ N= 158	
Training the model to be factually accurate, moral, and not harmful (safety)	8%	57%	8%	57%	6%	58%	8%	58%	10%	60%
Only using high-quality peer-reviewed content to train the model (quality model input)	7%	56%	11%	53%	7%	57%	7%	59%	5%	56%
Citing references by default (transparency)	8%	56%	8%	60%	36+ 8%	56%	7%	58%	36+ 9%	49%
Keeping the information input confidential (security)	13%	55%	10%	60%	o ³⁶⁺ 13%	55%	³⁶⁺ 14%	55%	³⁶⁺ 20%	40%
Abidance by any laws governing development and implementation (legality)	10%	52%	7%	55%	11%	53%	10%	54%	14%	48%
Training the model for high coherency outputs (quality model output)	8%	52%	8%	49%	6%	54%	³⁶⁺ 9%	54%	³⁶⁺ 10%	45%

Using high quality content for models, improving accuracy, transparency, security and governance all **strongly increase trust** in AI. Researchers in lower-middle-income countries are most likely to have increased trust in AI if input information is kept confidential (security)



% No impact/Strongly increase my trust	Researchers N= 2164	High Income N= 1110	Upper- Middle-Income N= 748	Lower- Middle-Income N= 256
Training the model to be factually accurate, moral, and not harmful (safety)	8% 57%	8% 57%	8% 57%	6% 61%
Only using high-quality peer-reviewed content to train the model (quality model input)	7% 56%	8% 56%	9% 55%	3% 59%
Citing references by default (transparency)	8% 56%	8% 56%	8% 57%	7% 53%
Keeping the information input confidential (security)	13% 55%	15% 52%	12% 55%	8% 64% HI
Abidance by any laws governing development and implementation (legality)	10% 52%	11% 50%	9% 55%	HI 8% 54%
Training the model for high coherency outputs (quality model output)	8% 52%	9% 50%	9% 53%	3% 55%

Top-three factors selected for increasing **comfort** using tools dependent on AI. Robust governance and AI model using up-to-date information ranked highest. Researchers in North and South America more likely to say that having accountability through human oversight would increase their comfort in that tool (1/2)



Base: n= 2284

	Researchers 1/2 ^{N= 2284}	Asia Pacific N= 745	Europe N= 758	North America N= 347	South America N= 234	Middle East & Africa N= 165
Robust governance on data and information used to train the model	37%	39%	меа 36%	меа 37% м	ea 43% ● _M	EU 25% •
That the information the model uses is up-to-date	37%	36%	sa 40%	sa 39%	sa 29% •	39% SA
That there is accountability through human oversight	36%	32%	36%	AP 48% ● _M	AP EU EA 43%	AP EU EA 30%
That privacy is respected on user inputs	35%	38%	EU NA 34%	NA 27%	35%	NA 36% NA
That the way the solution works can be, and is, explained	29%	29%	31%	sa 29%	25%	26%

Top-three factors selected for increasing **comfort** using tools dependent on AI. Robust governance and AI model using up-to-date information ranked highest. Researchers in South America are more likely to want to know real-world impact has been considered (2/2)



	Researchers 2/2 N= 2284	Asia Pacific N= 745	Europe N= 758	North Amer N= 347		South America N= 234	Middle East & N= 165	& Africa
That actions have been taken to prevent unfair bias	29%	26%	31%	ар 32%	AP	29%	28%	
That the real-world impact on people has been considered	27%	23%	26%	30%	AP	35%	AP 31%	AP
That privacy is respected on outputs generated by the model	e 25%	27%	EU NA 23%	NA 18%	•	29%	EU NA 25%	NA
Don't know / not sure	6%	6%	7%	sa 7%	SA	3%	8%	SA
None of the above	2%	2%	2%	3%		2%	2%	

Top-three factors selected for increasing **comfort** using tools dependent on AI. Robust governance and AI model using up-to-date information ranked highest. Researchers in the USA more likely to say having accountability through human oversight would increase comfort (1/2)



1/2	Researchers N= 2284	USA N= 298	China N= 311	India N= 101	
Robust governance on data and information used to train the model	37%	37%	43%	• _{IN} 30%	
That the information the model uses is up-to-date	37%	41%	сн 30%	41%	СН
That there is accountability through human oversight	36%	47%	OH 1N 29%	29%	
That privacy is respected on user inputs	35%	26%	48%	IN US 34%	
That the way the solution works can be, and is, explained	29%	30%	28%	24%	

Top-three factors selected for increasing **comfort** in using tools dependent on AI. Robust governance and AI model using up-to-date information ranked highest. Researchers in China more likely to say that privacy in outputs is respected would increase their comfort in a tool (2/2)



Base: n= 2284

2/2	Researchers N= 2284	USA N= 298	China N= 311	India N= 101	
That actions have been taken to prevent unfair bias	29%	34%	• сн 25%	27%	
That the real-world impact on people has been considered	27%	29%	сн 22%	26%	
That privacy is respected on outputs generated by the model	25%	17%	31%	US 27%	US
Don't know / not sure	6%	7%	сн 4%	8%	СН
None of the above	2%	2%	2%	1%	

Top-three factors selected for increasing **comfort** in using tools dependent on AI. Robust governance and AI model using up-to-date information ranked highest. Little difference by gender on top ranked factors (1/2)



Select: up to three

Base: n= 2284

1/2	Researchers N= 2284	Men N= 1464	Women N= 692
Robust governance on data and information used to train the model	37%	38%	35%
That the information the model uses is up-to-date	37%	37%	37%
That there is accountability through human oversight	36%	35%	37%
That privacy is respected on user inputs	35%	34%	37%
That the way the solution works can be, and is, explained	29%	29%	29%

Significantly higher/ lower than..

Significantly higher than.

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

Top-three factors selected for increasing **comfort** in using tools dependent on AI. Robust governance and AI model using up-to-date information ranked highest. Women more likely to think real-world impact has been considered would increase **comfort** (2/2)



2/2	Researchers N= 2284	Men N= 1464	Women N= 692
That actions have been taken to prevent unfair bias	29%	30%	28%
That the real-world impact on people has been considered	27%	25%	30% • м
That privacy is respected on outputs generated by the model	25%	24%	27%
Don't know / not sure	6%	6%	5%
None of the above	2%	2%	1%

Significantly higher/ lower than...

Significantly higher than...

Top-three factors selected for increasing **comfort** in using tools dependent on AI. Robust governance and AI model using up-to-date information ranked highest. Researchers with up to 5 years active are most likely to say that privacy of user inputs would increase their comfort, whereas researchers with 36+ years least likely (1/2)



Select: up to three

Base: n= 2284

1/2	Researchers Ye	ears ≤5 ctive: N= 277	6-10 N= 418	11-35 N= 418	36+ N= 167
Robust governance on data and information used to train the model	37%	34%	37%	39%	34%
That the information the model uses is up-to-date	37%	37%	39%	37%	43%
That there is accountability through human oversight	36%	32%	36%	38%	41% ≤5
That privacy is respected on user inputs	35%	43% • 6-11	5 2/10/	35%	24%
That the way the solution works can be, and is, explained	29%	31%	26%	31%	33%

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

Top-three factors selected for increasing **comfort** in using tools dependent on AI. Researchers 36+ years in research are less likely to select privacy in outputs is respected compared to global average (2/2)



2/2	Researchers N= 2284	Years ≤5 Active: N= 277	6-10 N= 418	11-35 N= 418	36+ N= 167	
That actions have been taken to prevent unfair bias	29%	24%	32%	≤5 31%	≤5 30%	_
That the real-world impact on people has been considered	27%	30%	6-10 23%	27%	29%	
That privacy is respected on outputs generated by the model	ne 25%	25%	36+ 25%	36+ 25%	36+ 16%	ı
Don't know / not sure	6%	4%	8%	≤5 5%	6%	
None of the above	2%	2%	1%	2%	3%	

Top-three factors selected for increasing **comfort** in using tools dependent on Al. Robust governance and AI model using up-to-date information ranked highest. Researchers in high income countries are more likely to rank model uses up-to-date information and accountability through human oversight higher (1/2)



1/2	Researchers N= 2284	High Income N= 1172	Upper- Middle-Income N= 787	Lower- Middle-Income N= 271
Robust governance on data and information used to train the model	37%	39%	ьм 39%	∟м 28% •
That the information the model uses is up-to-date	37%	40%	им 32%	38% UM
That there is accountability through human oversight	36%	40%	LM 32%	31%
That privacy is respected on user inputs	35%	31%	40%	^{HI} 35%
That the way the solution works can be, and is, explained	29%	32%	LM 28%	25%

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= 2284

Research

Top-three factors selected for increasing **comfort** in using tools dependent on Al. Robust governance and AI model using up-to-date information ranked highest, privacy of outputs ranked less of a concern in high income countries (2/2)



Base: n= 2284

2/2	Researchers N= 2284	High Income N= 1172	Upper- Middle-Income N= 787	Lower- Middle-Income N= 271
That actions have been taken to prevent unfair bias	29%	30%	28%	27%
That the real-world impact on people has been considered	27%	26%	27%	29%
That privacy is respected on outputs generated by the model	25%	22%	28% • н	29%
Don't know / not sure	6%	6%	6%	6%
None of the above	2%	2%	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



Significantly higher/lower than..

Opinion is divided as to whether AI should be integrated or kept separate in solutions researchers already use, more would prefer that it is provided as a separate module. In Europe the preference for it to be separate in highest, whereas in South America, integrated comes out on top



	Researchers N= 2243	Asia Pacific N= 745	Europe N= 754	North Ameri N= 347	South America N= 197	Middle East & Africa N= 165
provided as a separate module	41%	41%	SA MEA 46%	AP SA 41%	SA MEA 34%	30%
integrated into the product	36%	39%	● EU 29%	• 28%	49%	AP EU NA NA NA NA
Don't know / not sure	23%	20%	25%	AP 30%	eu 17%	30% • AP SA

Researchers prefer AI to be provided as a separate module in existing solutions they use. Researchers in China have a stronger preference for AI to be in a separate module



	Researchers N= 2243	USA N= 298	China N= 311	India N= 101
provided as a separate module	41%	41%	46% • IN	35%
integrated into the product	36%	29%	38% US	37%
Don't know / not sure	23%	30% • ^{CH}	16%	29%

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

Researchers prefer AI to be provided as a separate module in existing solutions they use. No difference by gender



	Researchers N= 2243	Men N= 1437	Women N= 678
provided as a separate module	41%	40%	43%
integrated into the product	36%	39%	33%
Don't know / not sure	23%	22%	24%

Researchers prefer AI to be provided as a separate module in existing solutions they use. Researchers with 6-10 years active have the greatest preference for AI functionality to be integrated into the product



Select: only one

Base: n= 2243

	Researchers N= 2243	Years ≤5 Active: N= 276	6-10 N= 409	11-35 N= 409	36+ N= 165
provided as a separate module	41%	45%	6-10 39	42%	40%
integrated into the product	36%	39%	36+ 43	35% of 1-35 35%	36+ 22%
Don't know / not sure	23%	16%	19%	23%	≤5 38% •6-10 11-35 ≤5

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

Researchers prefer AI to be provided as a separate module in existing solutions they use. A higher proportion would prefer generative AI functionality to be integrated in upper-middle-income countries



	Researchers N= 2243	High Income N= 1168	Upper- Middle-Income N= 750	Lower- Middle-Income N= 271
provided as a separate module	41%	43%	LM 41%	ы 34% ●
integrated into the product	36%	32%	40%	38% н
Don't know / not sure	23%	25%	^{UM} 19%	27%

Research

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

4. Areas That Would Benefit From Al

Theme 4



Areas That Would Benefit From AI (General)

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? Only shown by overall

Slide 121



Researchers believe AI would be beneficial across a range of activities, the area least likely to benefit is funding related activities



% No Benefit/At least some benefit	Researchers N= 2156
Data Science activities	4% 96%
Using scientific content (e.g. keeping up-to-date)	7% 93%
Teaching/Lecturing activities	5%
Research related activities	5% 95%
Publication and monitoring impact of research (e.g. authoring or reviewing)	8% 92%
Funding related activities	17% 83%



5. Likelihood To Use an Al Assistant

Theme 5



Likelihood To Use an Al 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...

All only available by region & key market

complete research related activities	review prior studies	Slide 124
preparing your paper	proof your paper	Slide 124
using scientific content	generate a synthesis of research articles	Slide 124





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

% Unlikely/Likely	Researchers N= 535 - 946
review prior studies, identify gaps in knowledge and generate a new research hypothesis for testing	8% 92%
proof your paper	9% 91%
generate a synthesis of research articles in an area (which includes references)	11% 89%



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

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



% Unlikely/Likely	Researchers N= 535 - 946	Asia Pacific N=189 - 317	Europe N= 157 - 300	North America N= 67 - 150	South America N= 68 - 99	Middle East & Africa N= 42 - 68
review prior studies, identify gaps in knowledge and generate a new research hypothesis for testing	8% 92%	6%	94% G IA 10%	90% ^{NA} 16% 84% •	6% 94%	NA 4% 96% NA
proof your paper	9% 91%	6% 9	4% EU 14% 86	6% • 12% • 88%	4% 96%	EU 17% 83%
generate a synthesis of research articles in an area (which includes references)	11%	11%	89% 13% 8	92%	7% 93%	_{EU} 14%

Significantly higher/lower than...

Significantly higher than.

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



% Unlikely/Likely	Researchers N= 535 - 946	USA N= 56 - 127	China N= 79 - 126	India N= 28 - 44
review prior studies, identify gaps in knowledge and generate a new research hypothesis for testing	8% 92%	16% 84%	7% 93% 1	us 0% 100%
proof your paper	9% 91%	13% 88%	1% 99%	us
generate a synthesis of research articles in an area (which includes references)	11% 89%	10% 90%	8% 92%	3% 97%

6. Al and Elsevier

Theme 6



Al & Elsevier

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

Slide 129



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



% Disagree/Agree	Researchers N= 2034	Asia Pacific N= 668	Europe N= 654	North America N= 302	South America N= 222	Middle East & Africa N= 157
Elsevier is well positioned to develop generative Al tools	4% 74%	3% 73%	NA 5%	75% NA 7% 63% •	2% 84%	AP EU 2% 86% ● EU NA
I would trust tools developed by Elsevier that utilize generative AI	4% 74%	2% 76%	EU NA 8%	70% NA 9% 63% 63%	2% 84%	AP JEU NA 3% 87% EU NA

Significantly higher than..

Researchers in India are more likely to trust Elsevier tools that utilize generative Al. Trust in Elsevier Al tools is lower than average in the USA



% Disagree/Agree	Researchers N= 2034	USA N= 260	China N= 291	India N= 92
Elsevier is well positioned to develop generative Al tools	4% 74%	7% 62%	1% 68%	(89% CH us
I would trust tools developed by Elsevier that utilize generative AI	4% 74%	8% 63%	1% 74% ^L	91% CH

Significantly higher than . .

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

Trust in Elsevier being well positioned to develop generative AI tools is higher among women

Significantly higher than...



Base: n= 2034

% Disagree/Agree	Total Men N= 2034 N= 1318		Women N= 616
Elsevier is well positioned to develop generative AI tools	4% 74%	4% 73%	2% 79% • м
I would trust tools developed by Elsevier that utilize generative Al	4%	4% 75%	4% 76%

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

Trust in Elsevier to develop tools and being well-positioned is high among researchers (74%)



% Disagree/Agree	Total N= 2034	Years Active	≤5 ∴ N= 248		6-10 N= 379		11-35 N= 379		36+ N= 146	
Elsevier is well positioned to develop generative AI tools	4%	74%	3%	73%	4%	74%	4%	76%	2%	79%
I would trust tools developed by Elsevier that utilize generative AI	4%	74%	4%	76%	4%	76%	6%	74%	2%	73%

Significantly higher than..

Researchers in lower-middle-income countries are most likely to agree that Elsevier is well placed to develop GenAl tools or trust tools developed by Elsevier



% Disagree/Agree	Researchers N= 2034	High Income N= 1007	Upper- Middle-Income N= 726	Lower- Middle-Income N= 252
Elsevier is well positioned to develop generative AI tools	4% 74%	7% 68%	2% 76% н	1 1% 89% HI
I would trust tools developed by Elsevier that utilize generative Al	4% 74%	8% 67%	1% 78% • H	1 1% 89% UM