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**ES&M**

TECHNOLOGY REGULATION, CLIMATE CHANGE, AND AI

Survey Results

January 8 – 13, 2020

## Key Points

- 1 Climate change and consumer data protection are greatly concerning to respondents in the U.S. and European Union, with 71% reporting concern about consumer data protection and 69% reporting concern about climate change.** Europeans report being more concerned about climate change than Americans (77% to 60%) while Americans report being more concerned about consumer data protection (73% to 69%).
- 2 62% of Americans and 7 in 10 Europeans prefer a precision regulation approach for technology, with less than 10% in either region supporting broad regulation of tech.** 85% of Europeans and 81% of Americans support consumer data protection in some form, and 70% of Europeans and 60% of Americans support AI regulation.
- 3 72% of Europeans and 59% of Americans would support a carbon tax,** and 71% of Europeans and 53% of Americans say that if the proceeds of a carbon tax went to a carbon dividend, they would be more likely to support such a tax.
- 4 Respondents in the U.S. are less comfortable than respondents in the E.U. are with various types of facial recognition technology, with 55% of Europeans comfortable with facial matching technology vs. just 47% of Americans.** Respondents in both regions are most comfortable with facial recognition being used by law enforcement agencies and health care companies, and least comfortable with facial recognition being used by advertisers and social media companies.
- 5 74% of American and 85% of EU respondents are in agreement that artificial intelligence systems should be transparent and explainable, and strong pluralities in both countries believe that disclosure should be required for companies creating or distributing AI systems.** Nearly 3 in 4 Europeans and two-thirds of Americans support regulations such as conducting risk assessments, doing pre-deployment testing for bias and fairness, and reporting to consumers and businesses that an AI system is being used in decision-making.

### Methodology

This study was conducted between January 8 – 13, 2020 by Morning Consult on behalf of IBM. The data represent the weighted results of 3,259 responses collected among adults 18 years of age and older, in the U.S. and 6 countries across the European Union (France, Germany, Ireland, Italy, Spain, and the U.K.). The responses were collected online in English, Spanish, French, German, and Italian, stratified by age and gender, and then weighted by age, gender, education, region, and race (where appropriate) within each country based on most recent national census projections in each country. Results from the E.U. have a margin of error of +/- 2%, while data from the U.S. have a margin of error of +/- 3% at a 95% confidence level.

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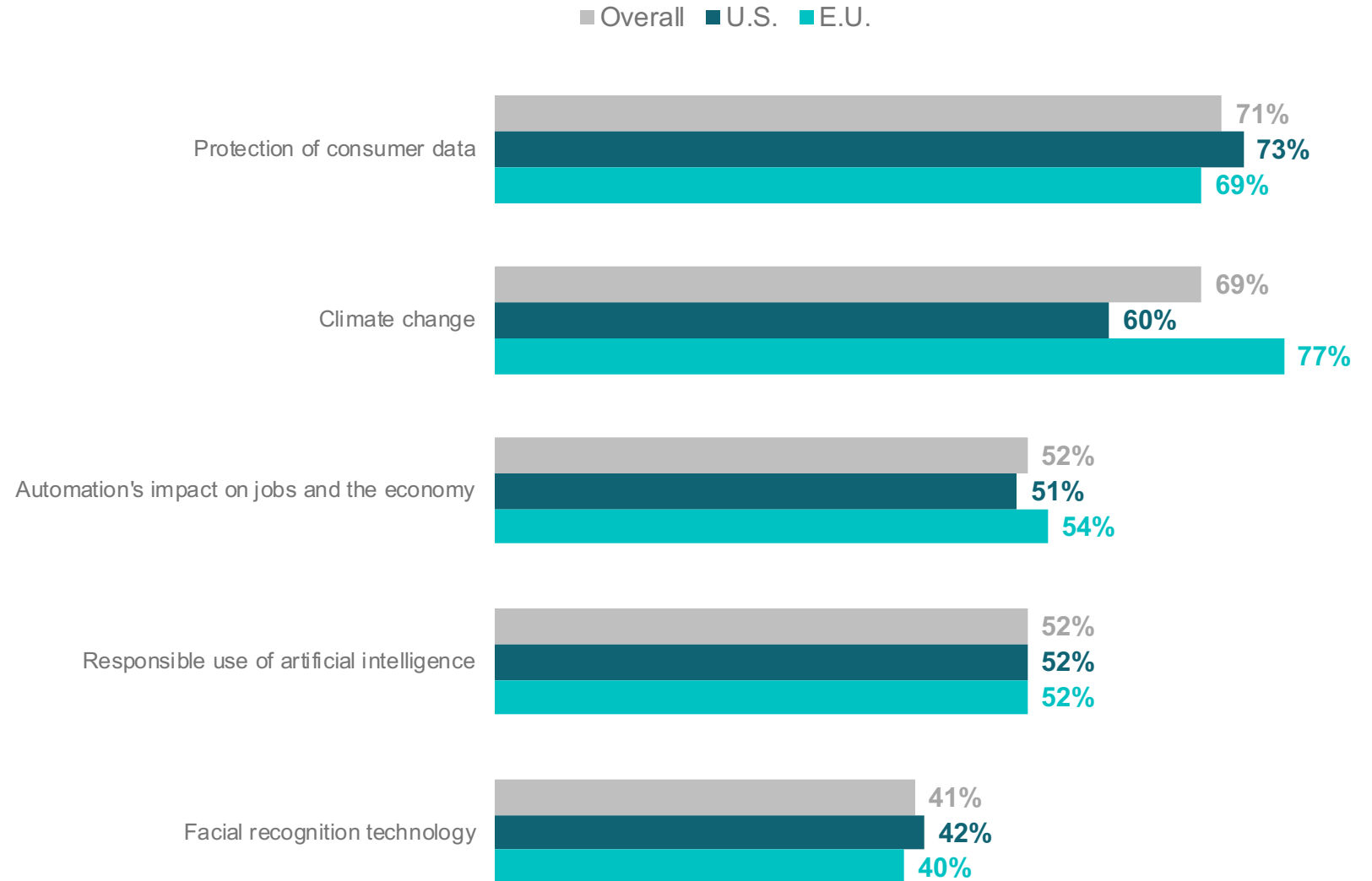
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## U.S. + E.U. Overall Tech Policy Beliefs and Concerns

Respondents are most concerned about protection of consumer data and climate change than the other topics, with U.S. respondents slightly more concerned about protection of consumer data than E.U. respondents, but E.U. respondents much more concerned about climate change than U.S. respondents

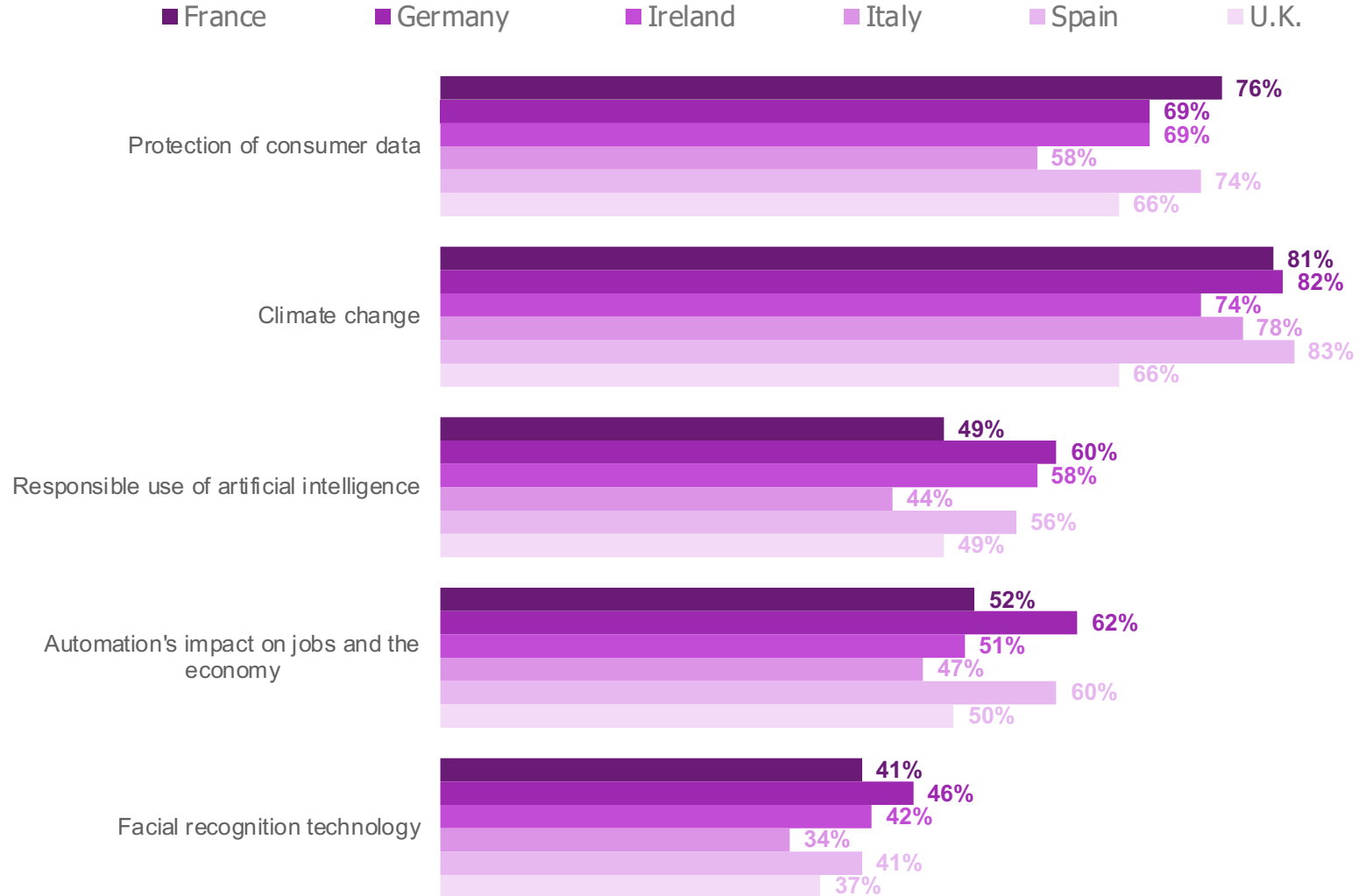
*How concerned are you about the following topics? [Showing Extremely + Somewhat Concerned]*



# U.S. + E.U. Overall Tech Policy Beliefs and Concerns

## Within the EU, French respondents are the most concerned with protection of consumer data; and Spanish respondents are the most concerned about climate change

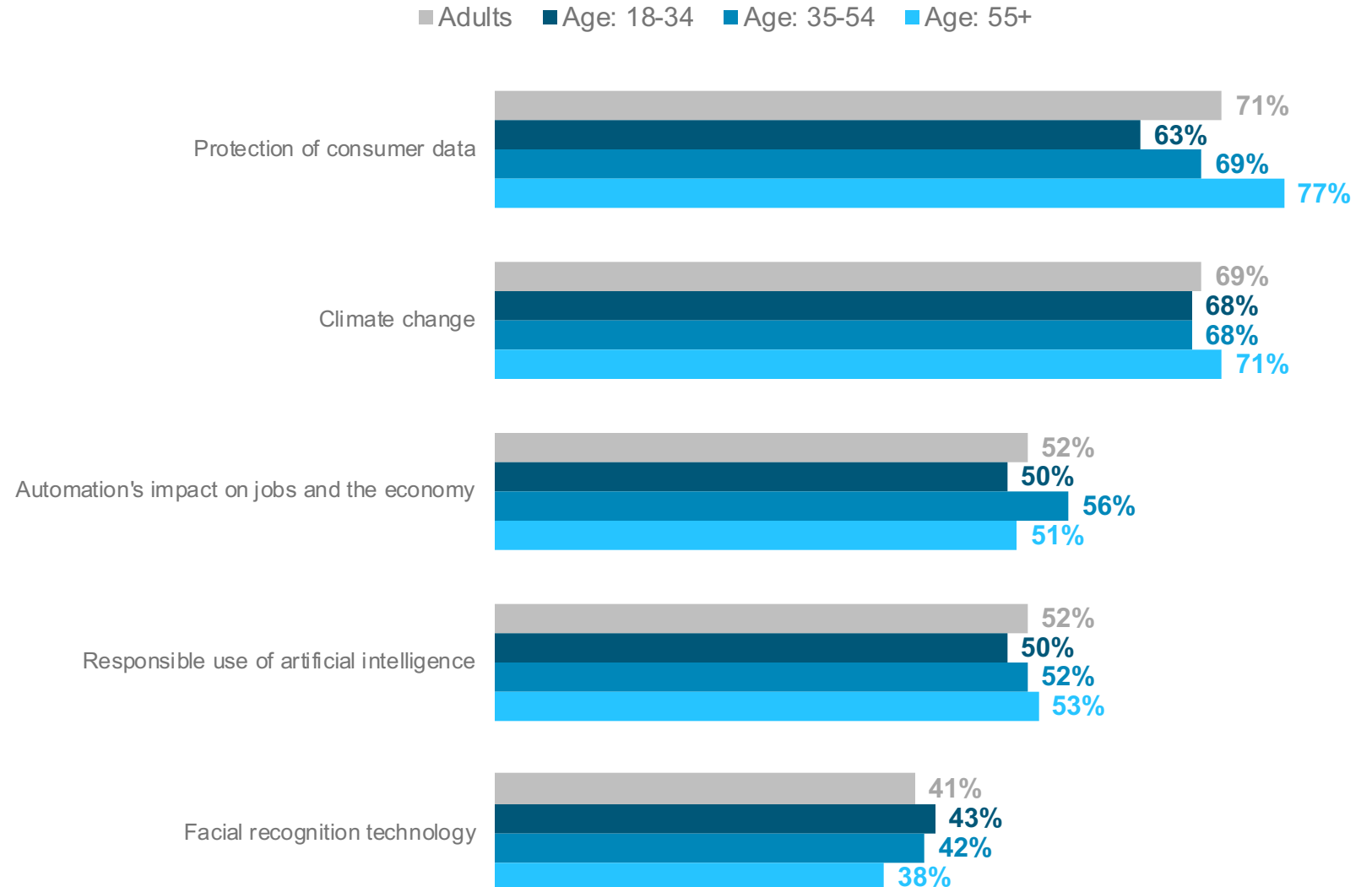
*How concerned are you about the following topics? [Showing Extremely + Somewhat Concerned]*



## U.S. + E.U. Overall Tech Policy Beliefs and Concerns

Overall, respondents are most concerned about climate change and the protection of consumer data, with older respondents especially concerned about the latter.

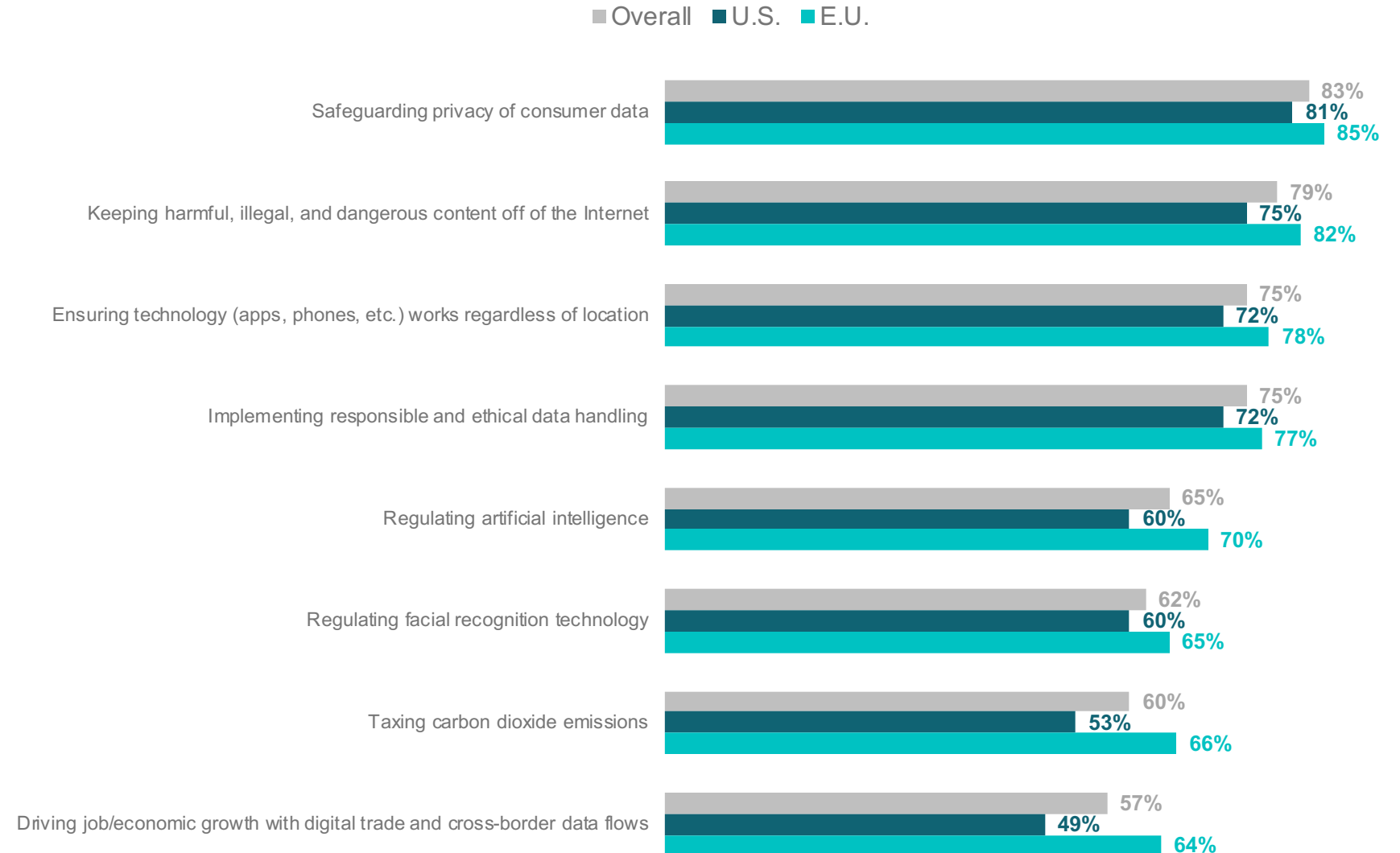
*How concerned are you about the following topics? [Showing Extremely + Somewhat Concerned]*



# U.S. + E.U. Overall Tech Policy Beliefs and Concerns

## Respondents are most supportive of policy initiatives around safeguarding privacy of consumer data and keeping harmful content off the Internet; U.S. adults are less supportive of each policy asked about compared to E.U. respondents

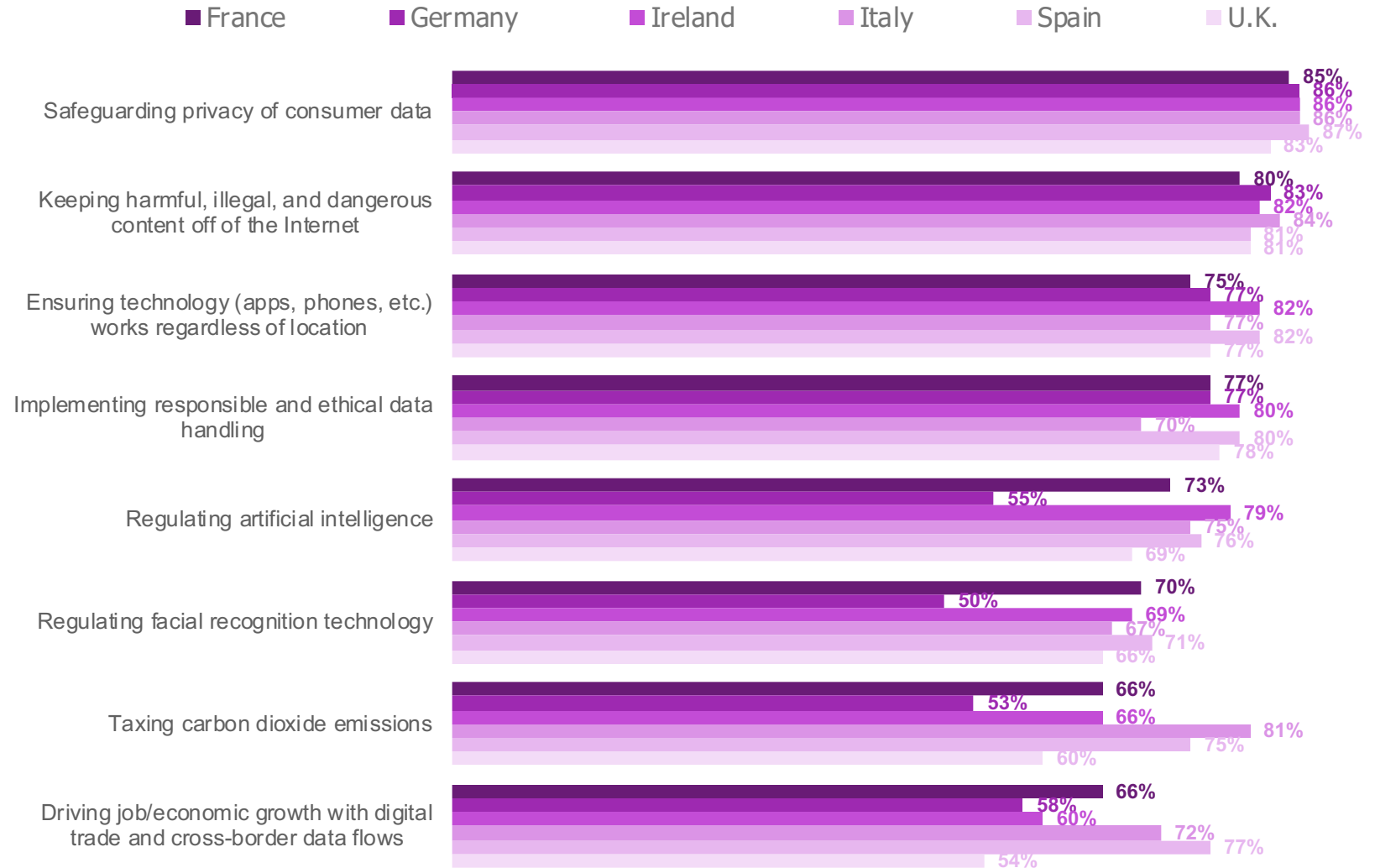
*How much would you support or oppose the following policy initiatives? [Showing Strongly + Somewhat Support]*



# U.S. + E.U. Overall Tech Policy Beliefs and Concerns

**Within the EU, almost nine in ten (87%) Spanish respondents support safeguarding privacy of consumer data, and 84% of Italian respondents support keeping harmful, illegal, and dangerous content off of the Internet**

*How much would you support or oppose the following policy initiatives? [Showing Strongly + Somewhat Support]*

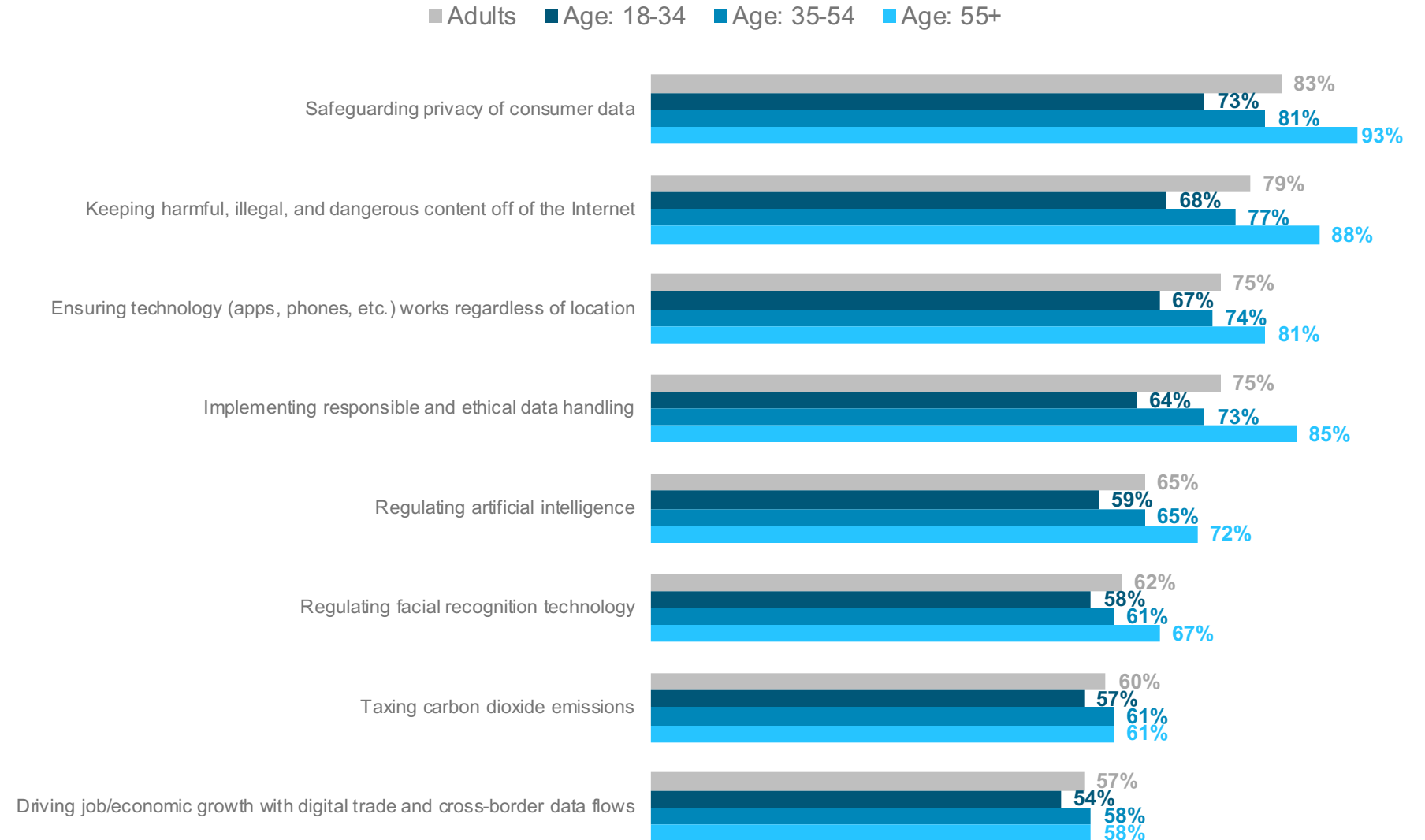




# U.S. + E.U. Overall Tech Policy Beliefs and Concerns

**Respondents over 55 are more likely to support issues across the board, especially when it comes to safeguarding privacy of consumer data, keeping harmful content off the internet, and implementing responsible and ethical data handling.**

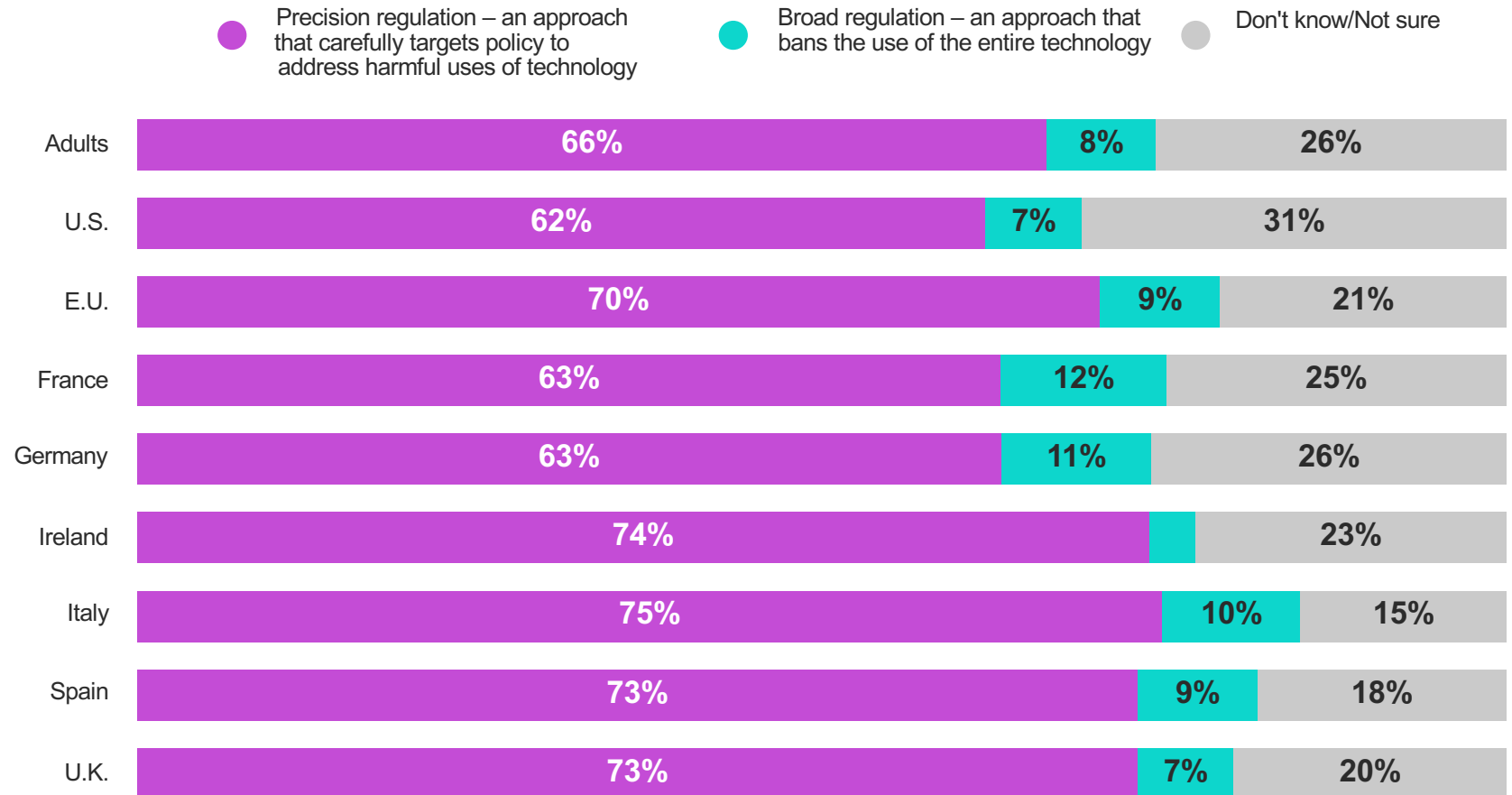
*How much would you support or oppose the following policy initiatives? [Showing Strongly + Somewhat Support]*



## U.S. + E.U. Overall Tech Policy Beliefs and Concerns

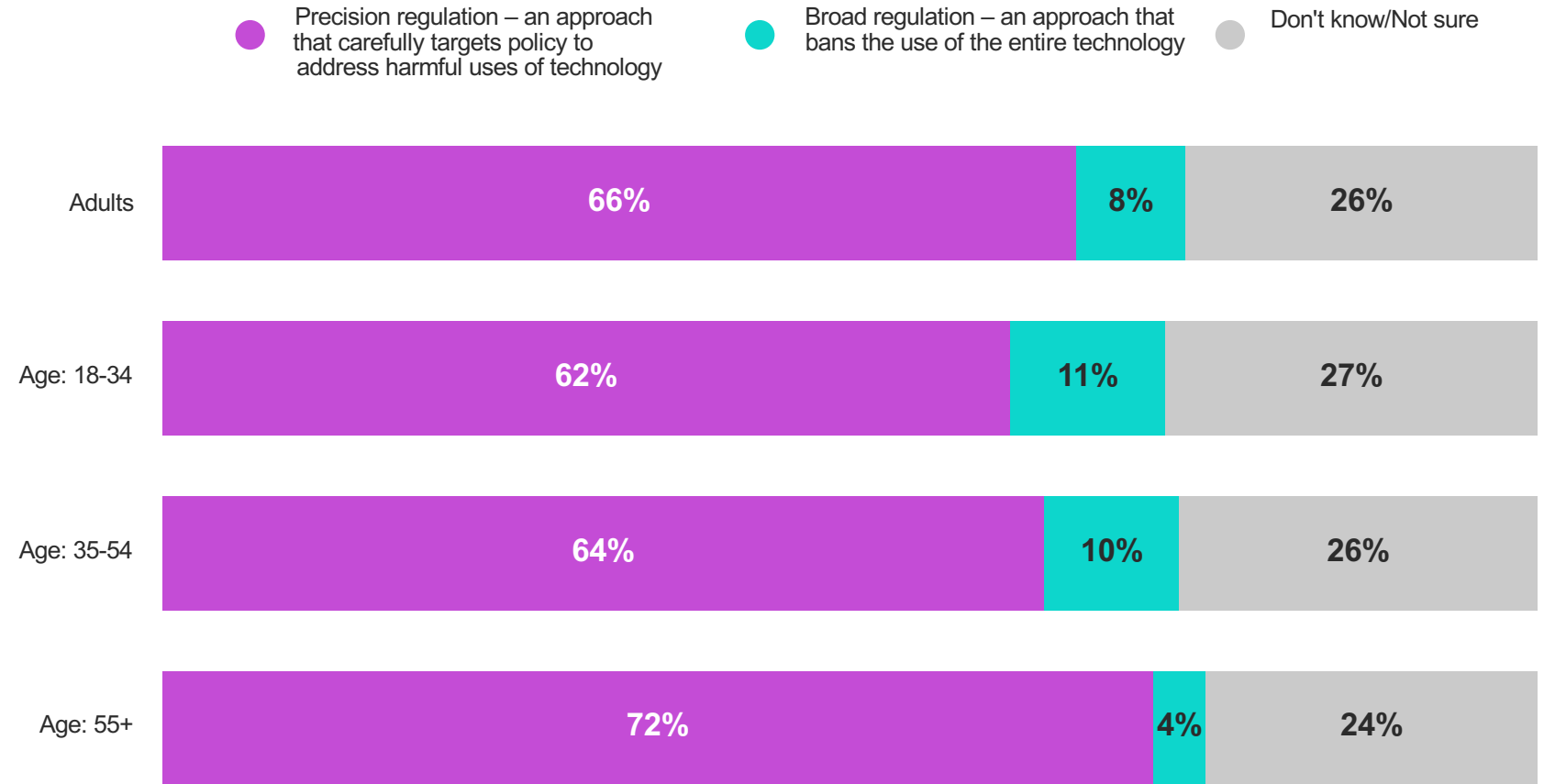
**Two-thirds of respondents prefer a precision regulation approach; 62% of Americans, while 7 in 10 Europeans prefer a precision regulation approach, which is largely driven by Ireland, Italy, Spain, and the U.K.**

*Below are two descriptions of approaches to technology regulation. Which description aligns closest with your viewpoint?*



## Globally, older respondents (those 55 and older) are more likely to favor precision regulation than younger respondents, though a majority of all age groups support a precision regulation approach

*Below are two descriptions of approaches to technology regulation. Which description aligns closest with your viewpoint?*

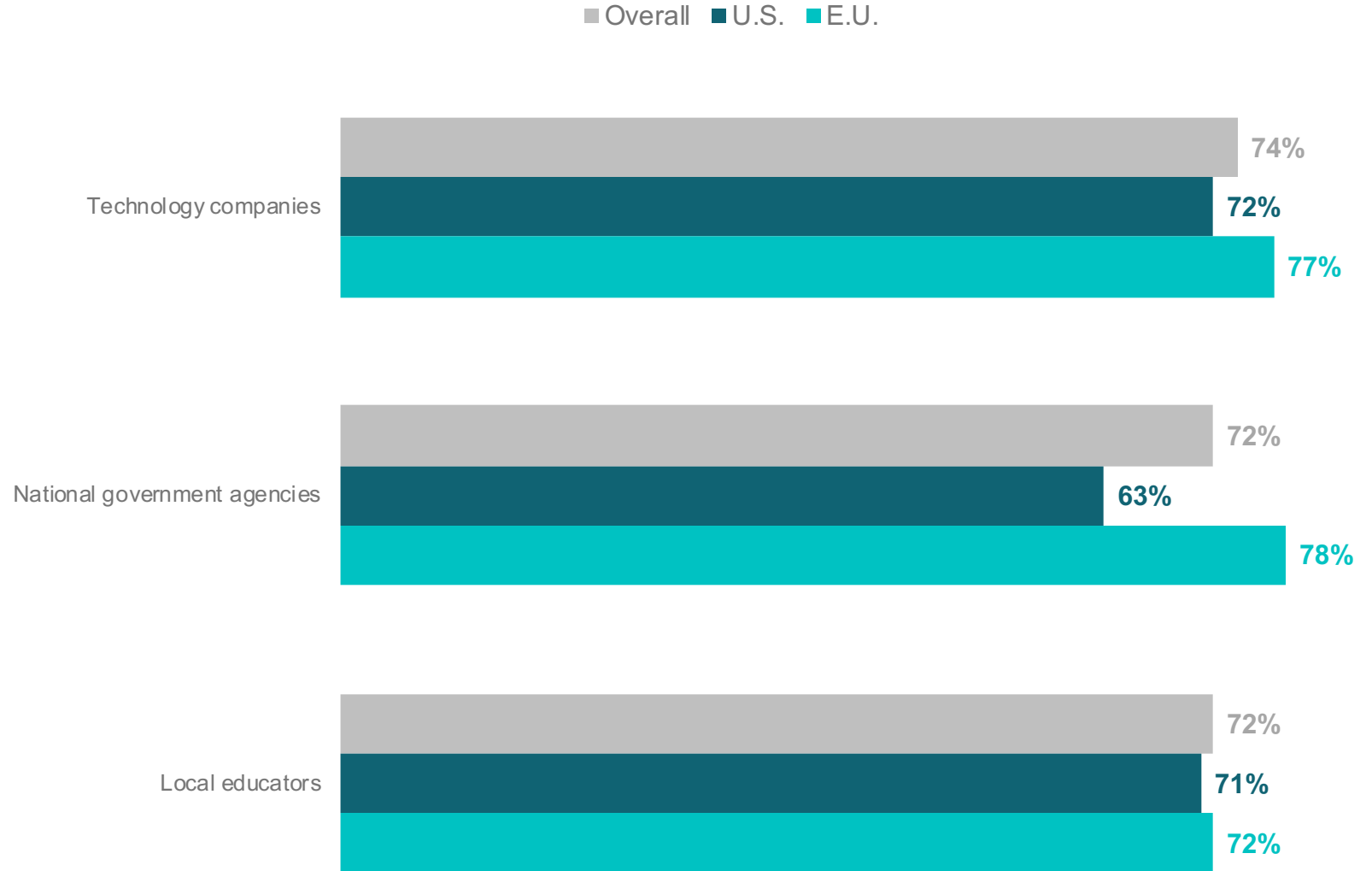


## U.S. + E.U. Overall Tech Policy Beliefs and Concerns

## U.S. + E.U. Overall Tech Policy Beliefs and Concerns

**Almost three in four (74%) of respondents think technology companies have a responsibility to provide workers with skills needed to succeed in a modern economy, with E.U. respondents more likely than U.S. respondents to say this by a margin of 5-points**

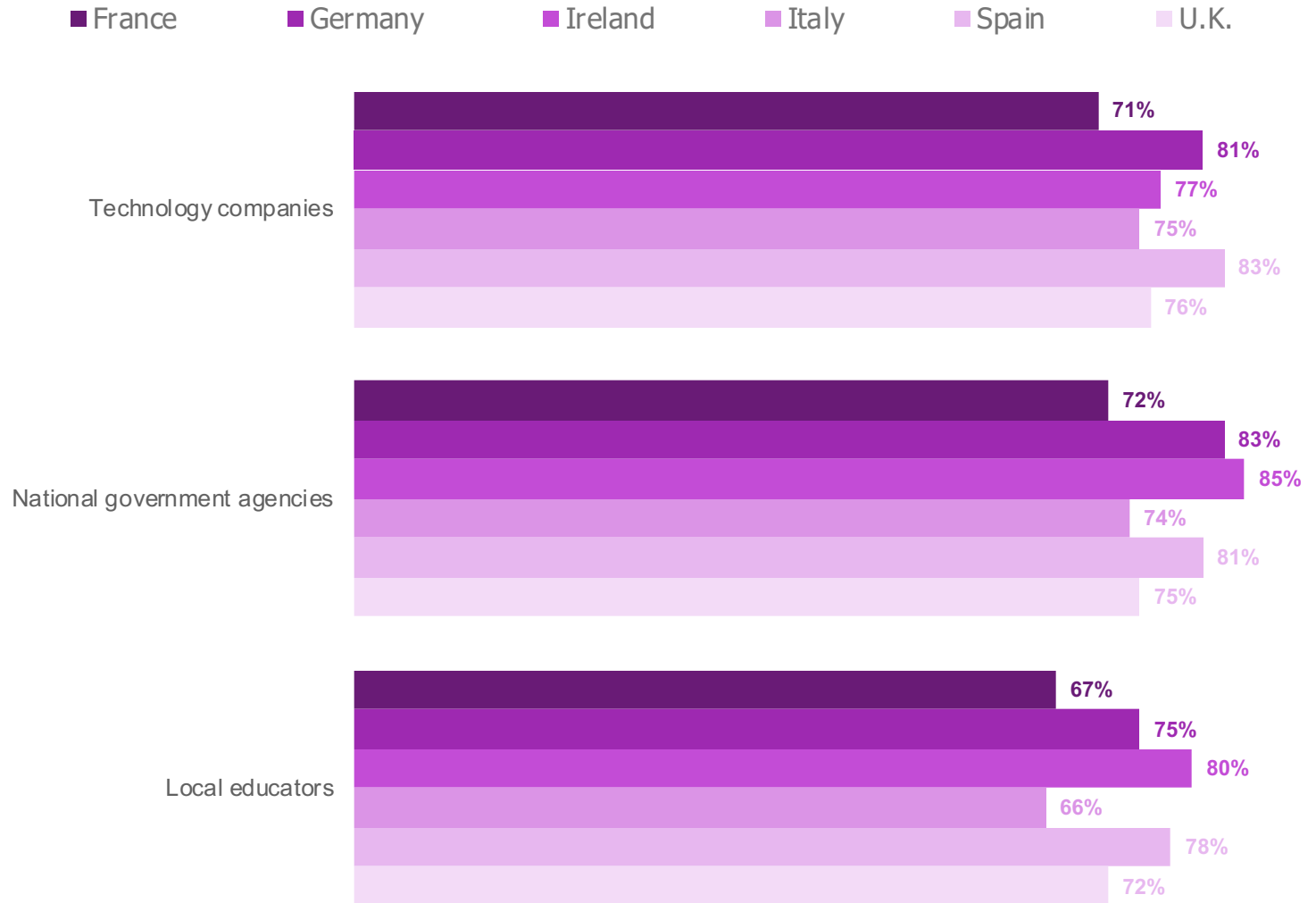
*How much responsibility do you think each of the following groups has to provide workers with the skills they need to succeed in a modern economy? [Showing A Great Deal + Some Responsibility]*



## U.S. + E.U. Overall Tech Policy Beliefs and Concerns

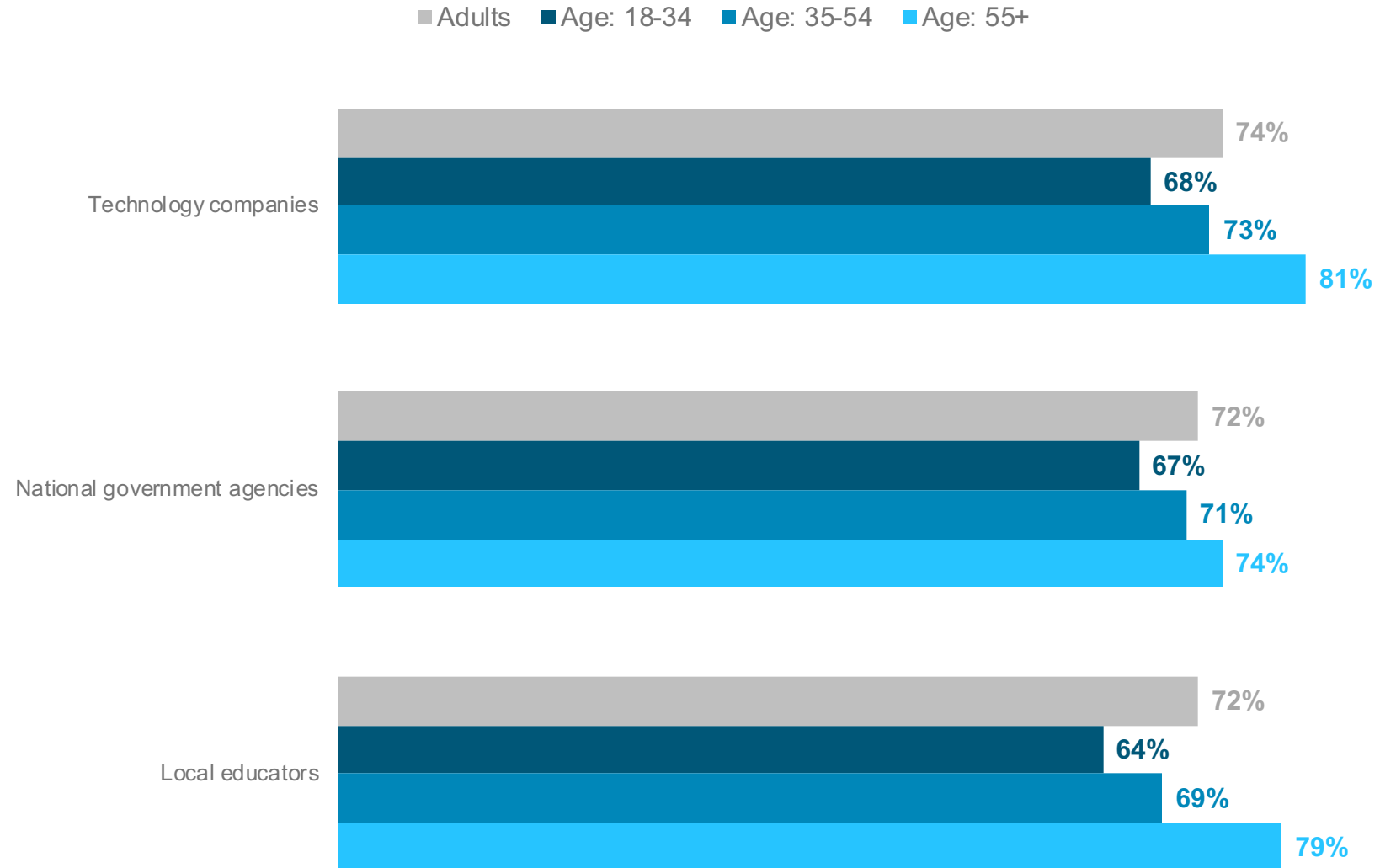
Over eight in ten Spanish and German respondents think technology companies have a responsibility to provide workers with the skills they need to succeed in a modern economy, and over eight in ten German and Irish respondents think national government agencies are responsible

*How much responsibility do you think each of the following groups has to provide workers with the skills they need to succeed in a modern economy? [Showing A Great Deal + Some Responsibility]*



## Older adults are more likely to hold each institution responsible for providing workers with the skills needed in a modern economy, especially technology companies.

*How much responsibility do you think each of the following groups has to provide workers with the skills they need to succeed in a modern economy? [Showing A Great Deal + Some Responsibility]*



## U.S. + E.U. Overall Tech Policy Beliefs and Concerns

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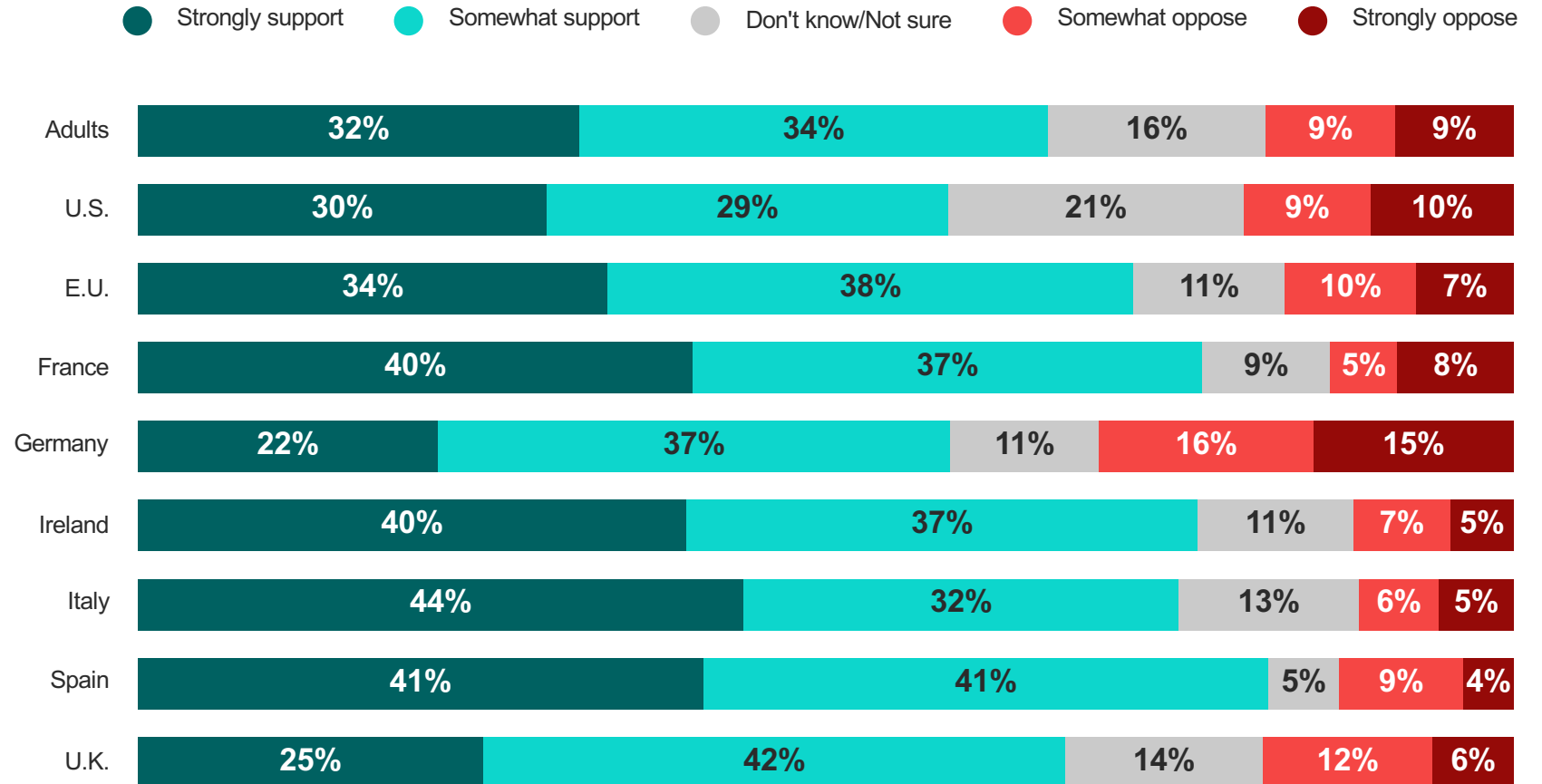
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## U.S. + E.U. Opinions on Carbon Taxation

**Two-thirds of global respondents support a carbon tax, with 72% of Europeans and 59% of Americans would support a carbon tax; respondents in Spain are particularly in favor of such a tax (82% support)**

*Would you support or oppose a carbon tax, where companies would be taxed based on the amount of carbon dioxide they emit annually?*

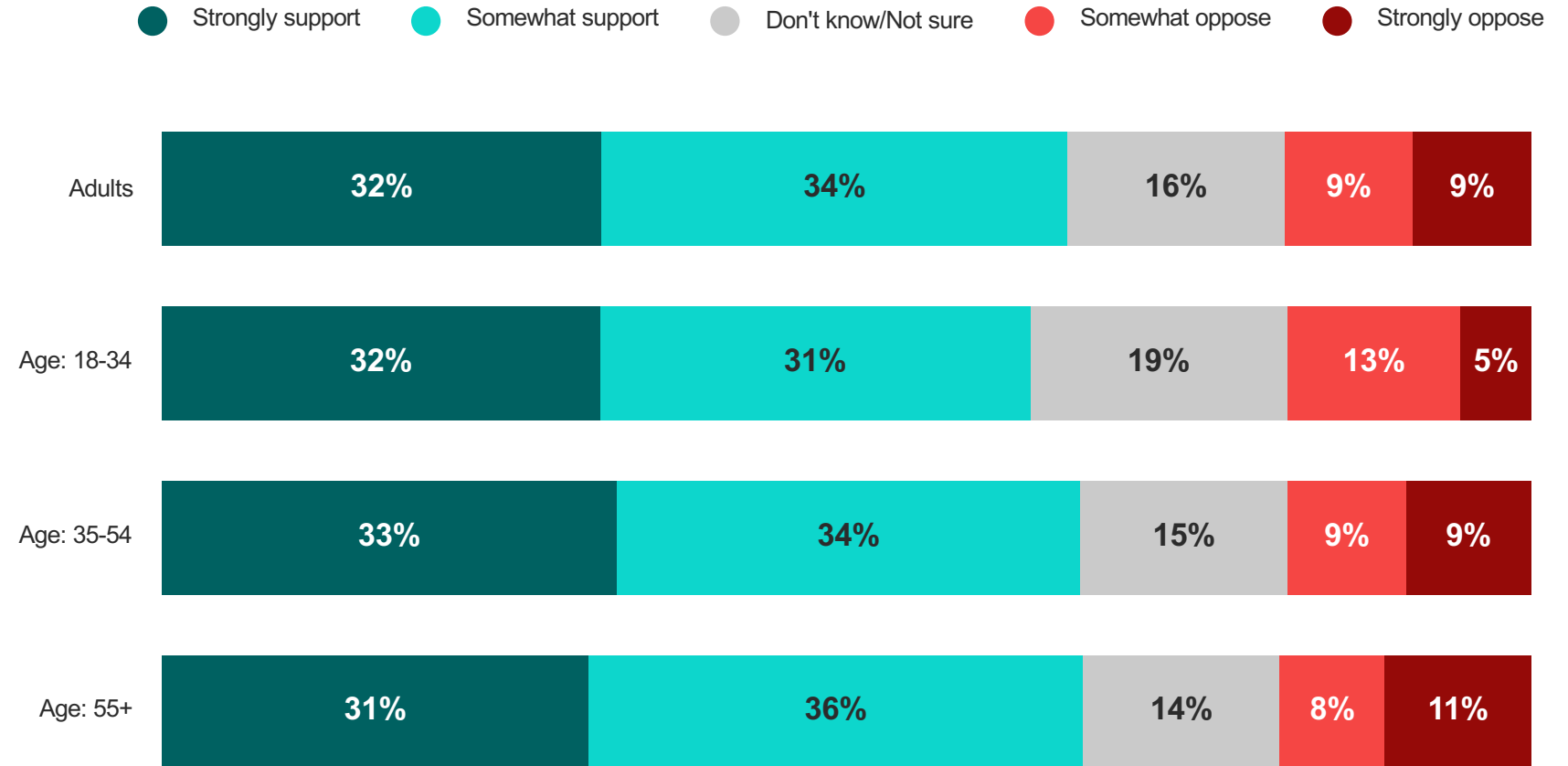




## U.S. + E.U. Opinions on Carbon Taxation

### Respondents across all age groups support a carbon tax at roughly equal levels

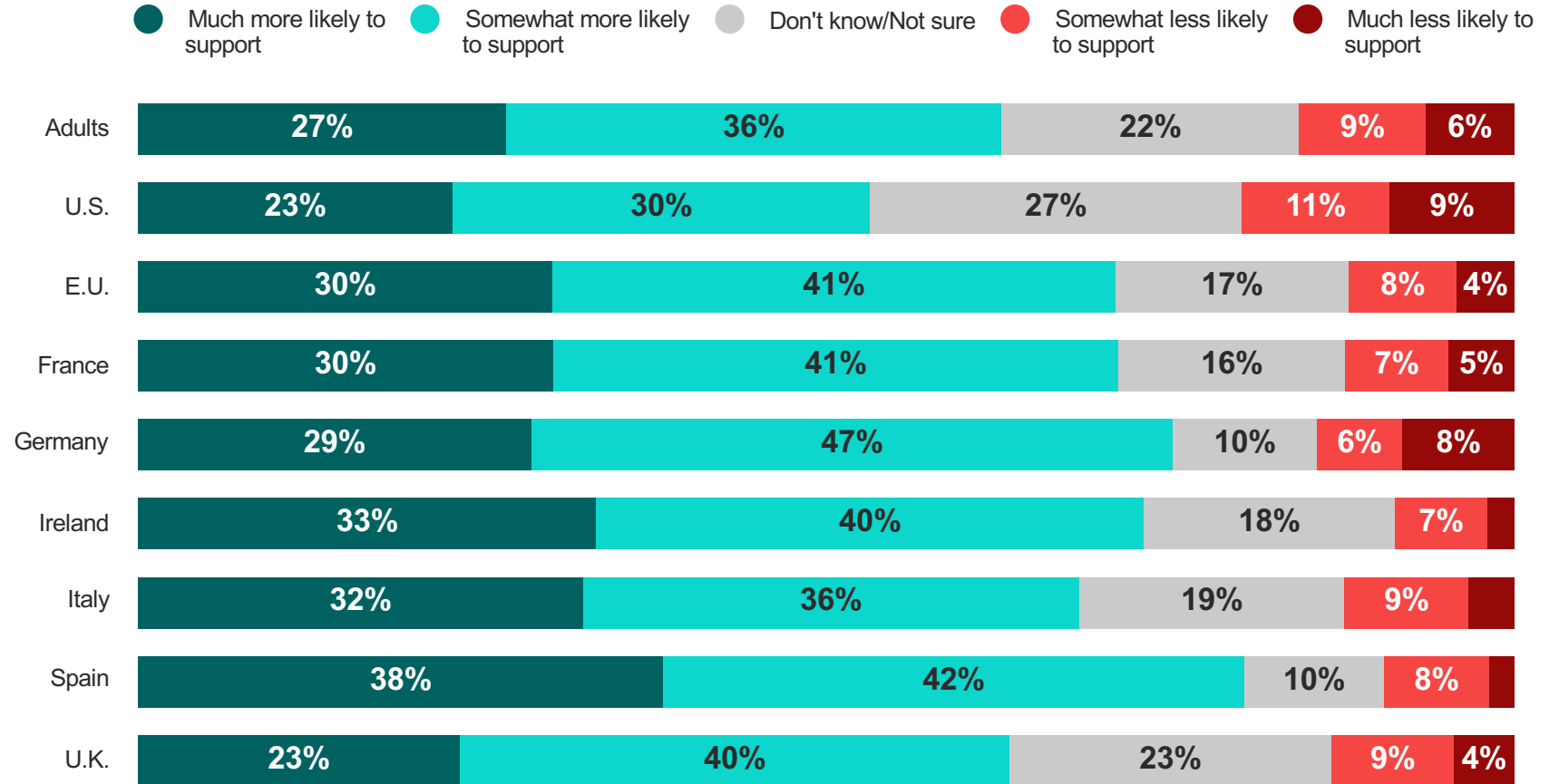
*Would you support or oppose a carbon tax, where companies would be taxed based on the amount of carbon dioxide they emit annually?*



## U.S. + E.U. Opinions on Carbon Taxation

# Over six in ten (63%) of global respondents say they would be more likely to support a carbon tax if the proceeds went to a carbon dividend, with 71% of Europeans more likely and 53% of Americans more likely

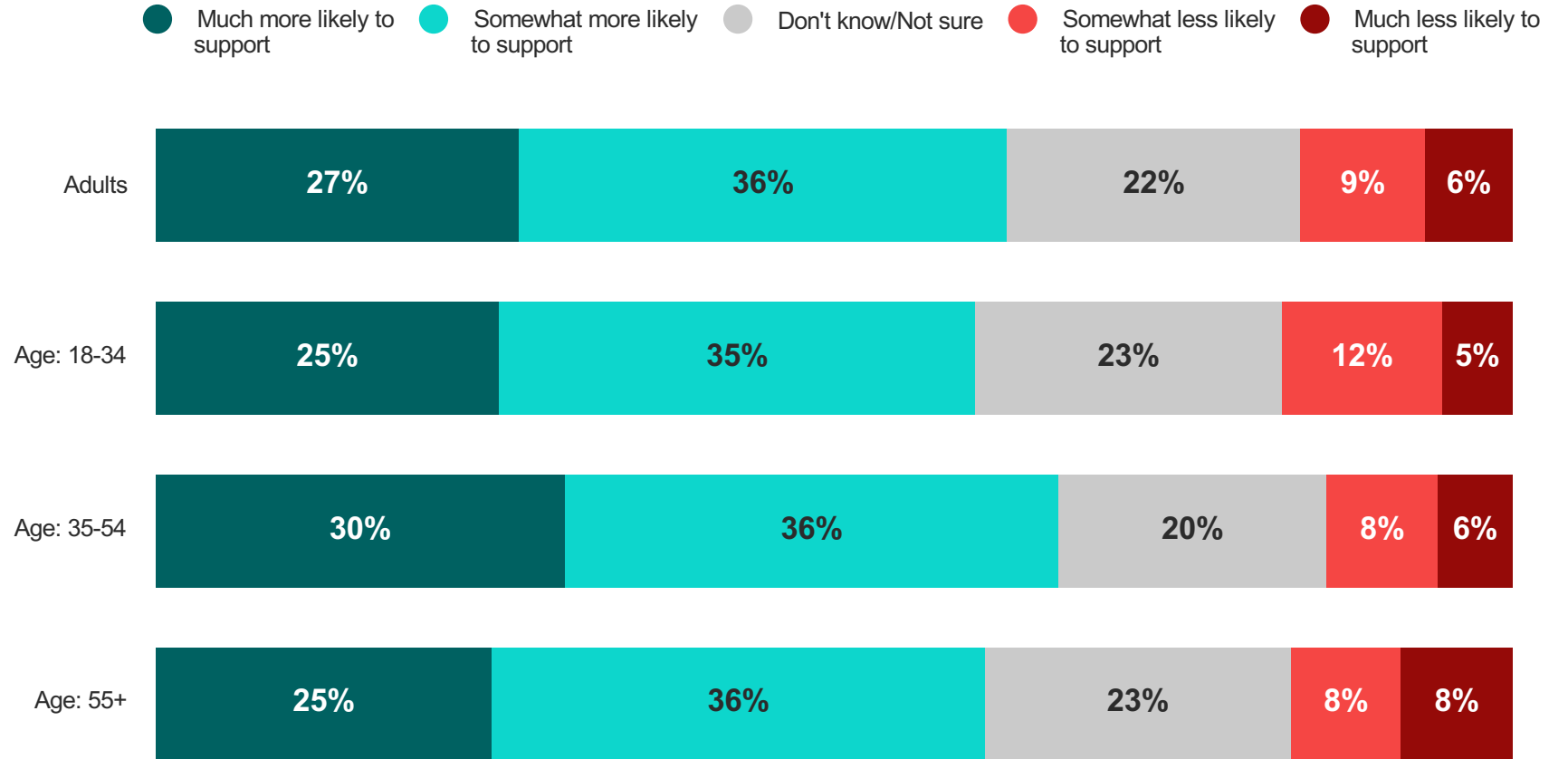
*If the proceeds of a carbon tax went to a 'carbon dividend', where the proceeds of the carbon tax would be divided up and returned directly to citizens, would that make you more or less likely to support a carbon tax?*



## U.S. + E.U. Opinions on Carbon Taxation

# Respondents across all age groups agreed that having the proceeds of a carbon tax distributed as a dividend would make them more likely to support it

*If the proceeds of a carbon tax went to a 'carbon dividend', where the proceeds of the carbon tax would be divided up and returned directly to citizens, would that make you more or less likely to support a carbon tax?*



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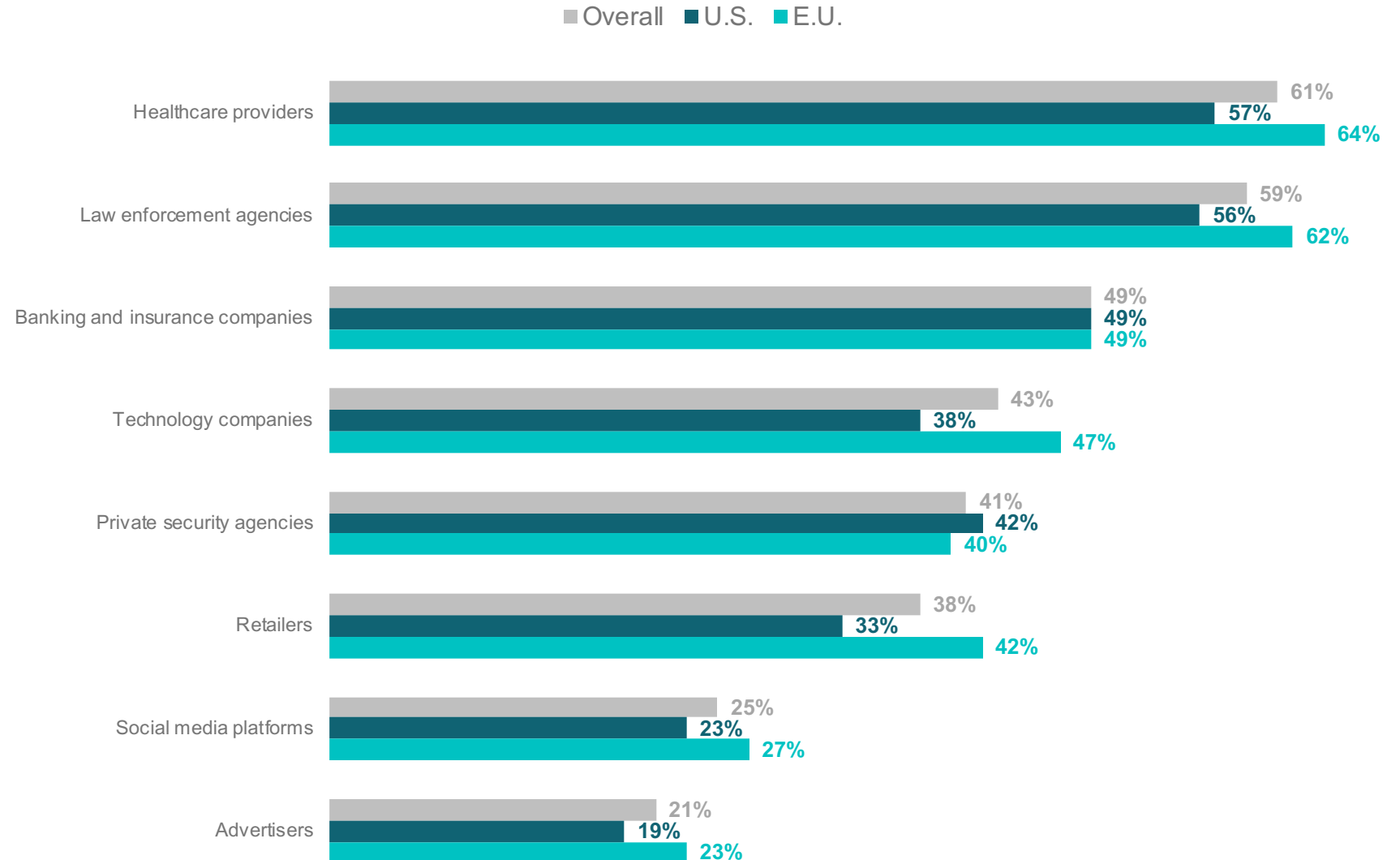
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**U.S. + E.U. Opinions on  
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## U.S. + E.U. Comfort with Facial Recognition Software

Globally, respondents are more likely to trust healthcare providers and law enforcement agencies to use facial recognition technology responsibly than social media platforms and advertisers; E.U. respondents are more likely to trust institutions than U.S. respondents, with the exception of private security agencies

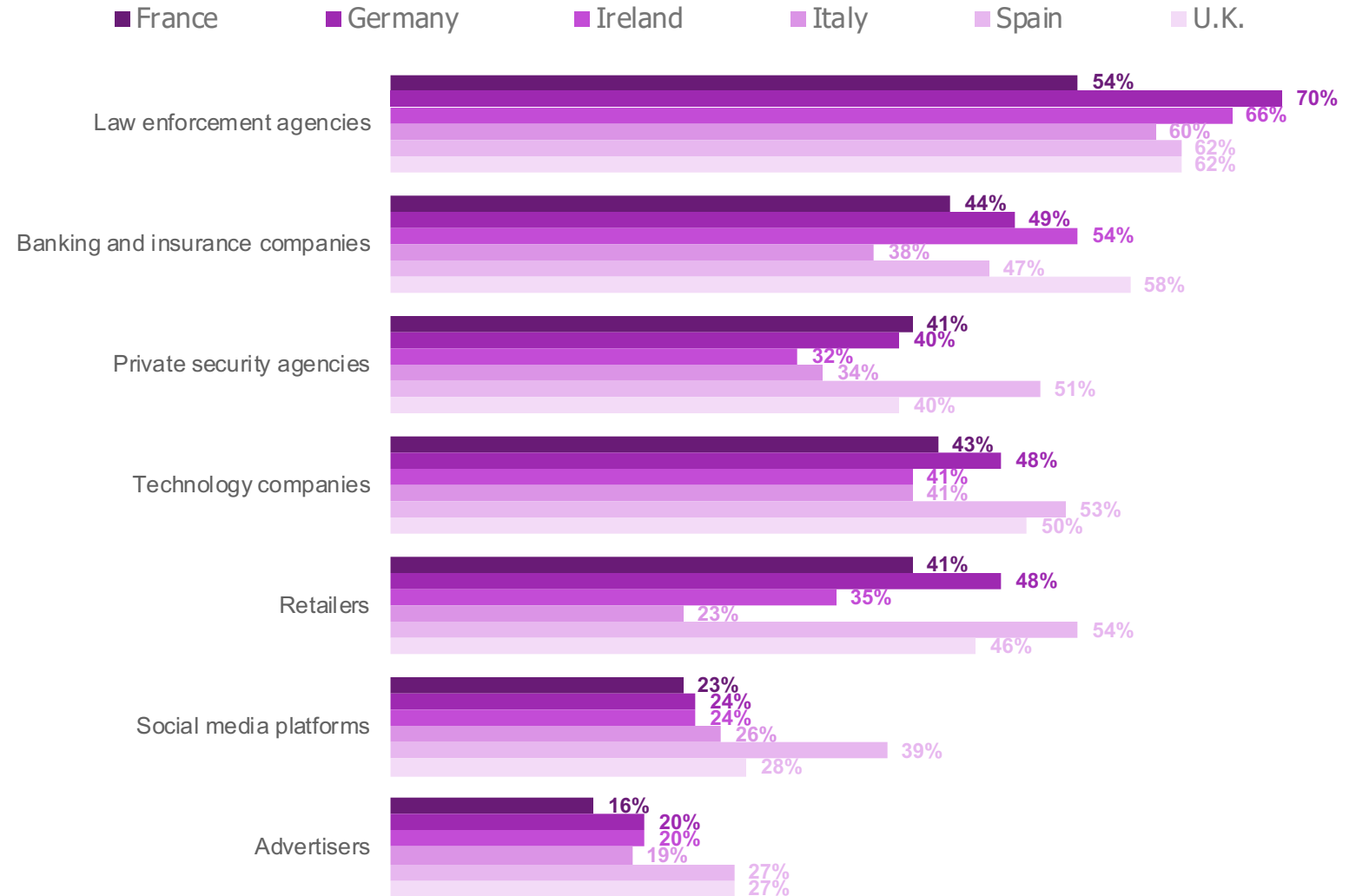
*How much do you trust the following groups to use facial recognition technology responsibly?  
[Showing Strongly + Somewhat Trust]*



# U.S. + E.U. Comfort with Facial Recognition Software

## Seven in ten (70%) German respondents trust law enforcement agencies to use facial recognition technology responsibly, and over seven in ten Spanish and U.K. respondents trust healthcare providers to use facial recognition responsibly

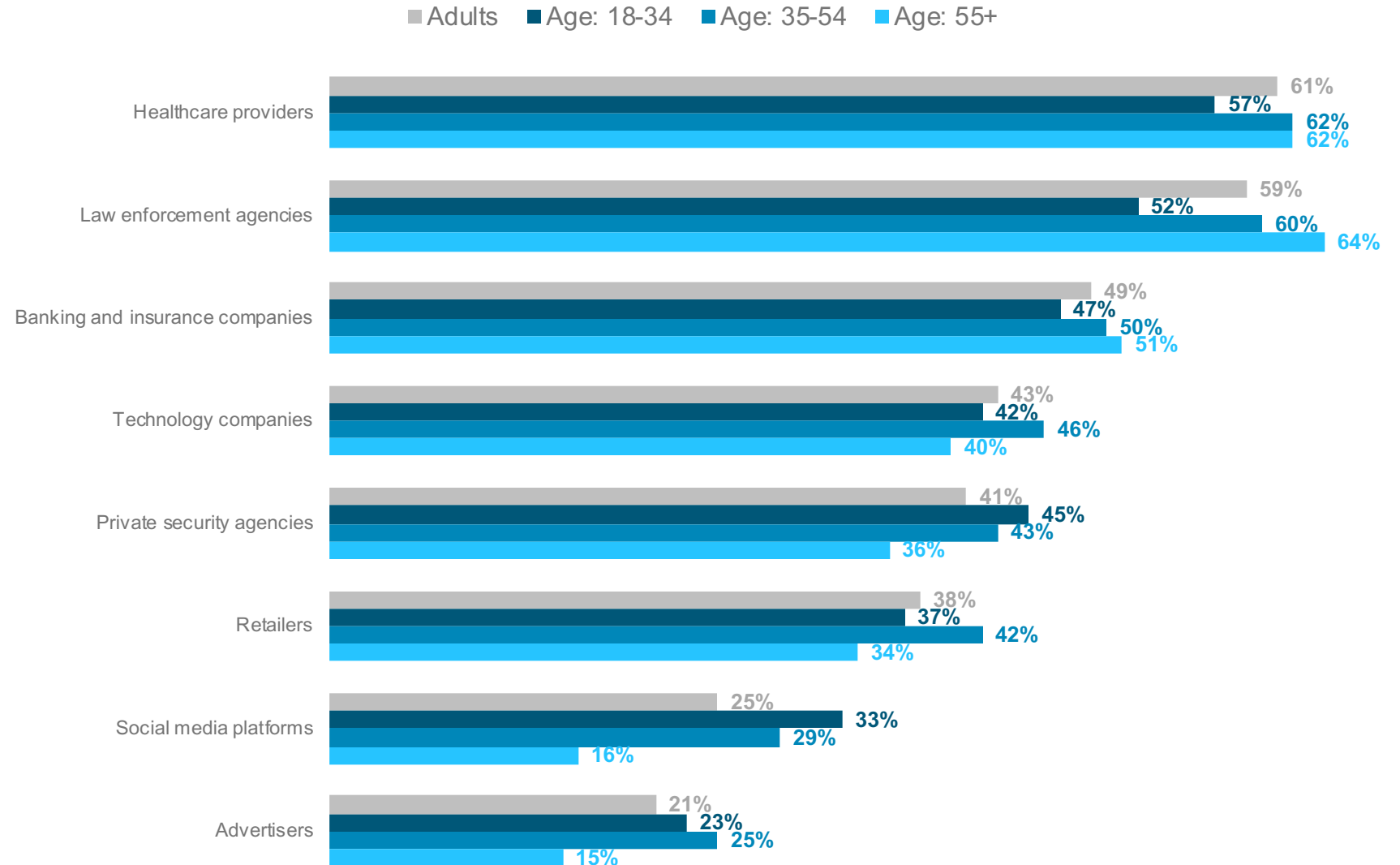
*How much do you trust the following groups to use facial recognition technology responsibly?  
[Showing Strongly + Somewhat Trust]*



# U.S. + E.U. Comfort with Facial Recognition Software

**Older respondents express much more trust in law enforcement agencies ability to use facial recognition technology responsibly, while younger respondents are more likely to trust tech and social media companies.**

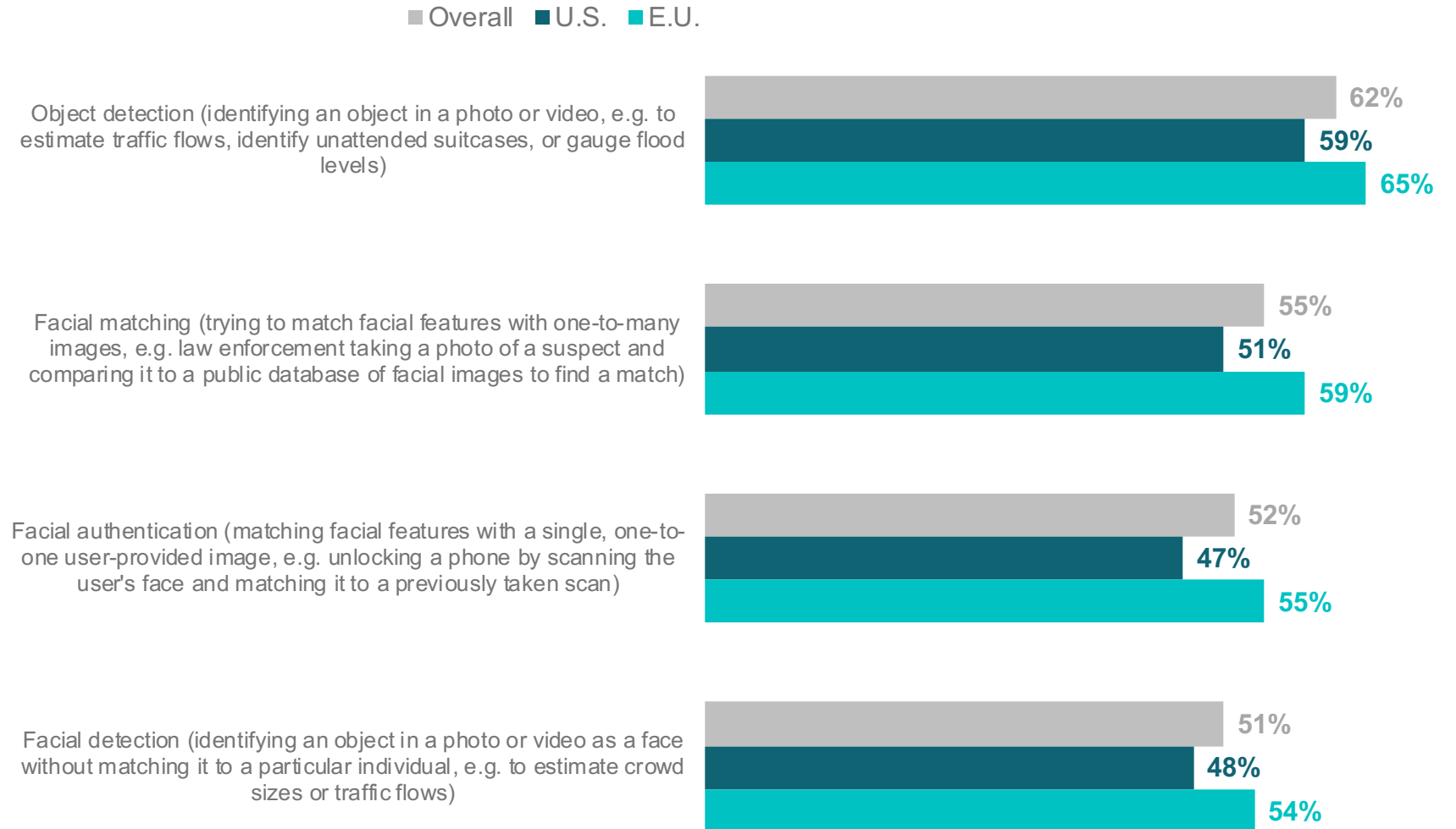
*How much do you trust the following groups to use facial recognition technology responsibly?  
[Showing Strongly + Somewhat Trust]*



## U.S. + E.U. Comfort with Facial Recognition Software

# Globally, respondents are most comfortable with object detection and facial matching technology; respondents in the U.S. are less comfortable than respondents in the E.U. are with various types of facial technology.

Facial and object recognition technology encompass a number of different types of use cases, some of which involve identifying the faces or objects involved and matching them to one specific user-provided image or to a database of other images. Please read the following descriptions of different categories of facial and object recognition technology, and rate how comfortable you would be with that type of facial or object recognition technology being used. [Showing Very + Somewhat Comfortable]

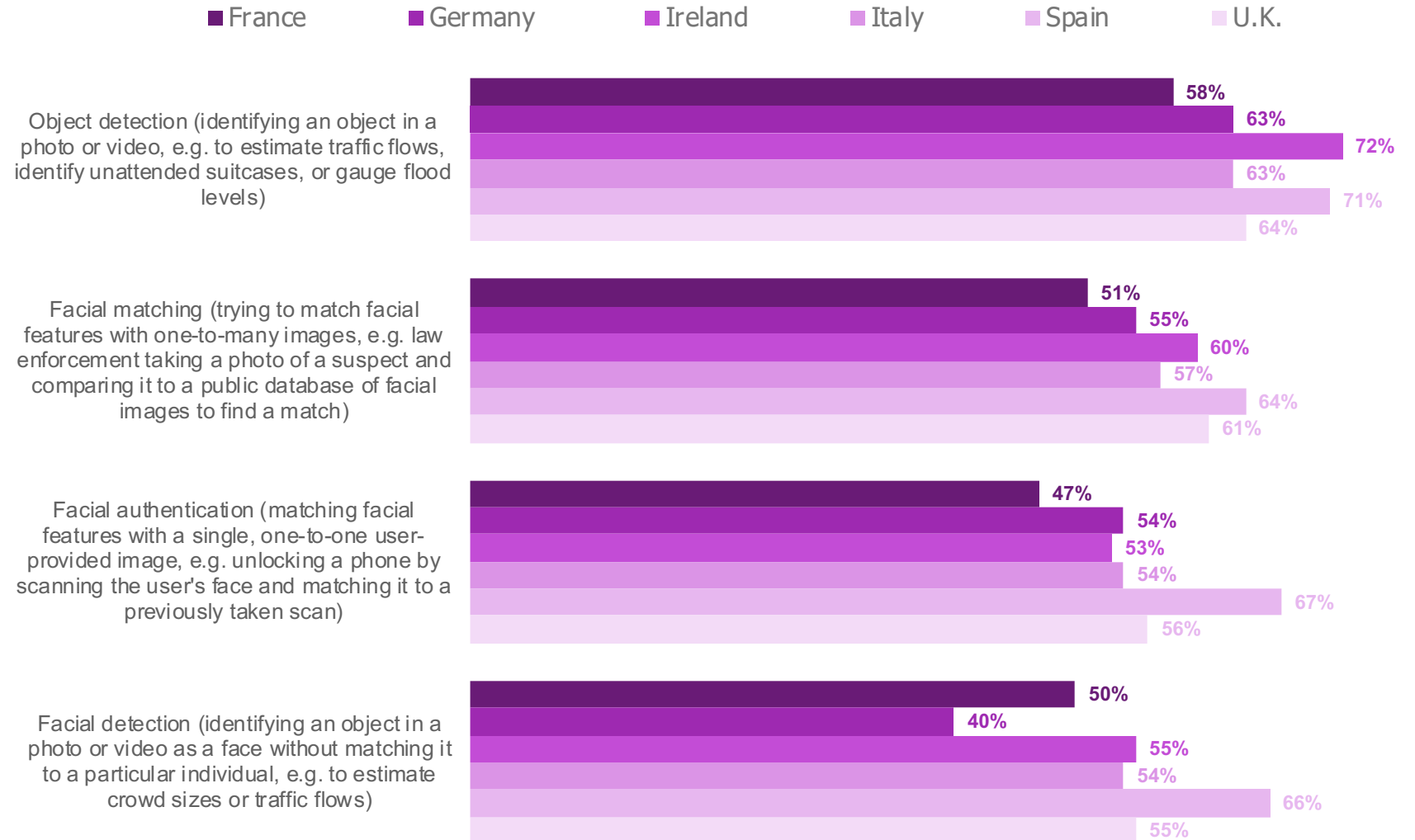




# U.S. + E.U. Comfort with Facial Recognition Software

## Over seven in ten Irish and Spanish respondents are comfortable with object detection technology, and almost two thirds (64%) of Spanish respondents say they are comfortable with facial matching technology

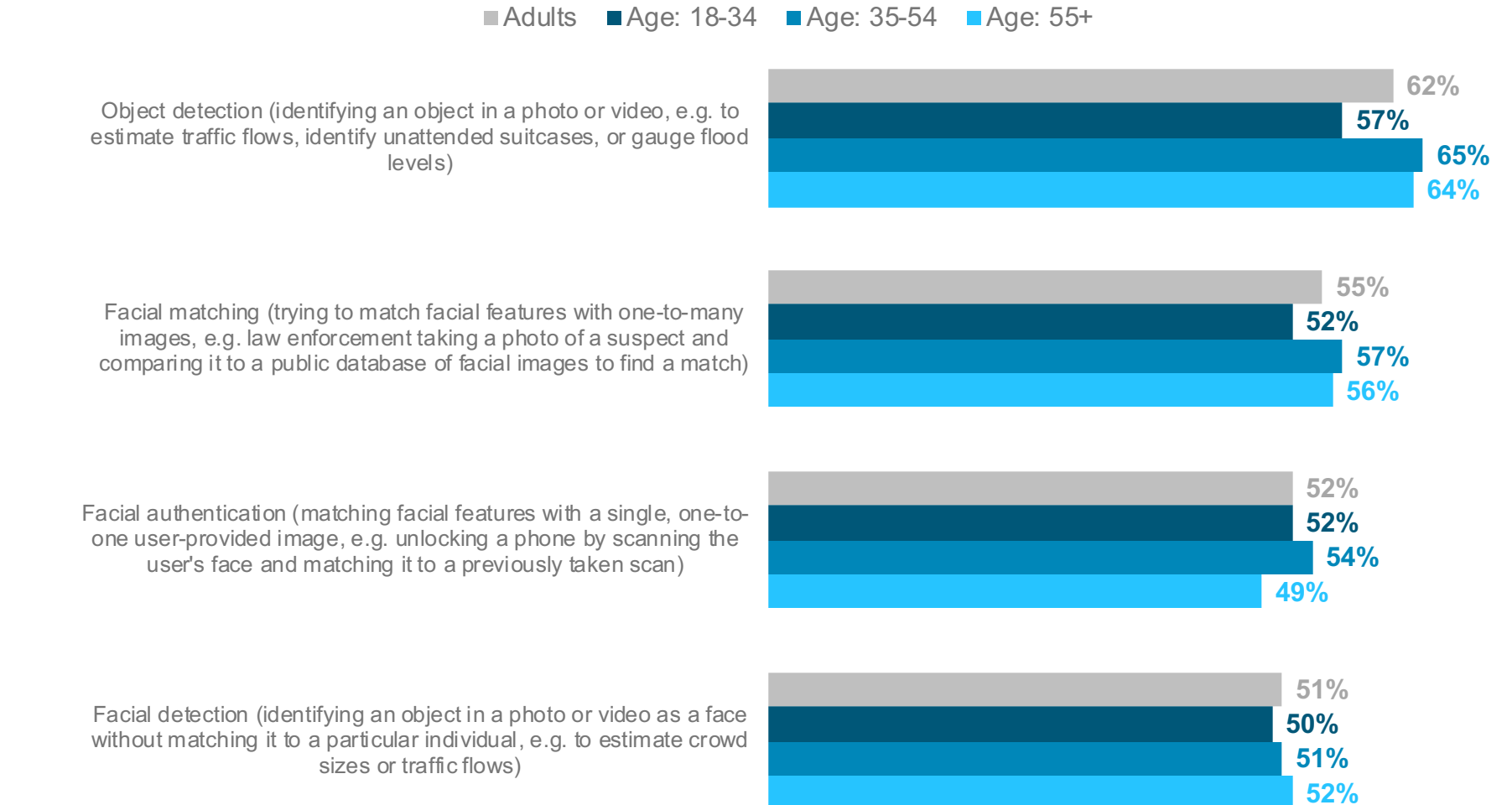
Facial and object recognition technology encompass a number of different types of use cases, some of which involve identifying the faces or objects involved and matching them to one specific user-provided image or to a database of other images. Please read the following descriptions of different categories of facial and object recognition technology, and rate how comfortable you would be with that type of facial or object recognition technology being used. **[Showing Very + Somewhat Comfortable]**



## U.S. + E.U. Comfort with Facial Recognition Software

**Older respondents are more comfortable with facial recognition software being used for the purposes of increasing public safety, such as facial matching or object detection, but are less comfortable with its use in technologies used by individuals, such as facial authentication.**

*Facial and object recognition technology encompass a number of different types of use cases, some of which involve identifying the faces or objects involved and matching them to one specific user-provided image or to a database of other images. Please read the following descriptions of different categories of facial and object recognition technology, and rate how comfortable you would be with that type of facial or object recognition technology being used. [Showing Very + Somewhat Comfortable]*



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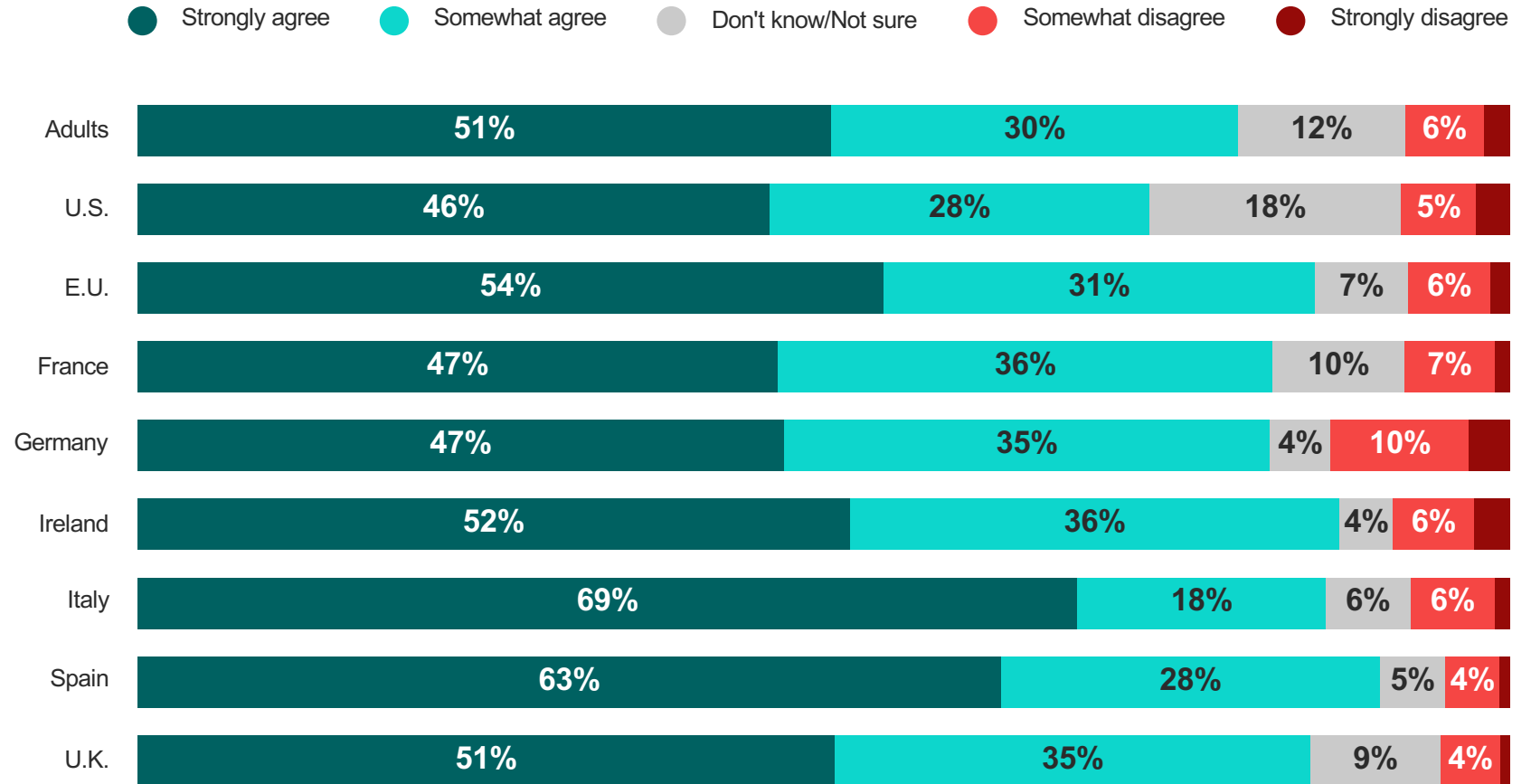
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**U.S. + E.U. Opinions on  
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## U.S. + E.U. Opinions on Artificial Intelligence Regulation

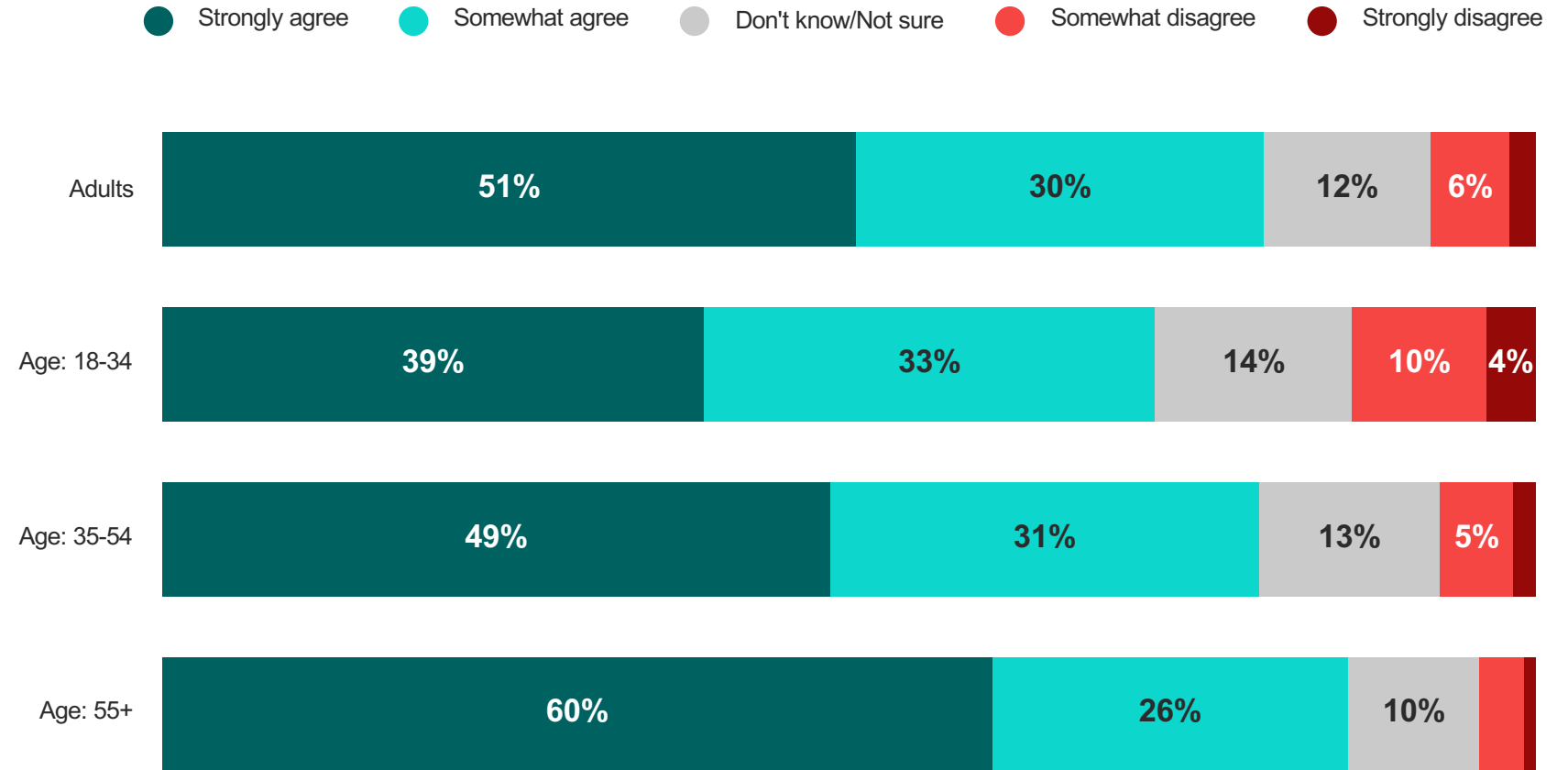
**There is overwhelming agreement that artificial intelligence systems should be transparent and explainable, with 74% of American and 85% of EU respondents agreeing that such systems should be transparent and explainable**

*How much do you agree or disagree that artificial intelligence systems should be transparent and explainable?*



**While all age groups agree that AI systems should be transparent and explainable, 6 in 10 respondents 55 and older strongly agree that such systems should be transparent and explainable vs. less than 4 in 10 under 35**

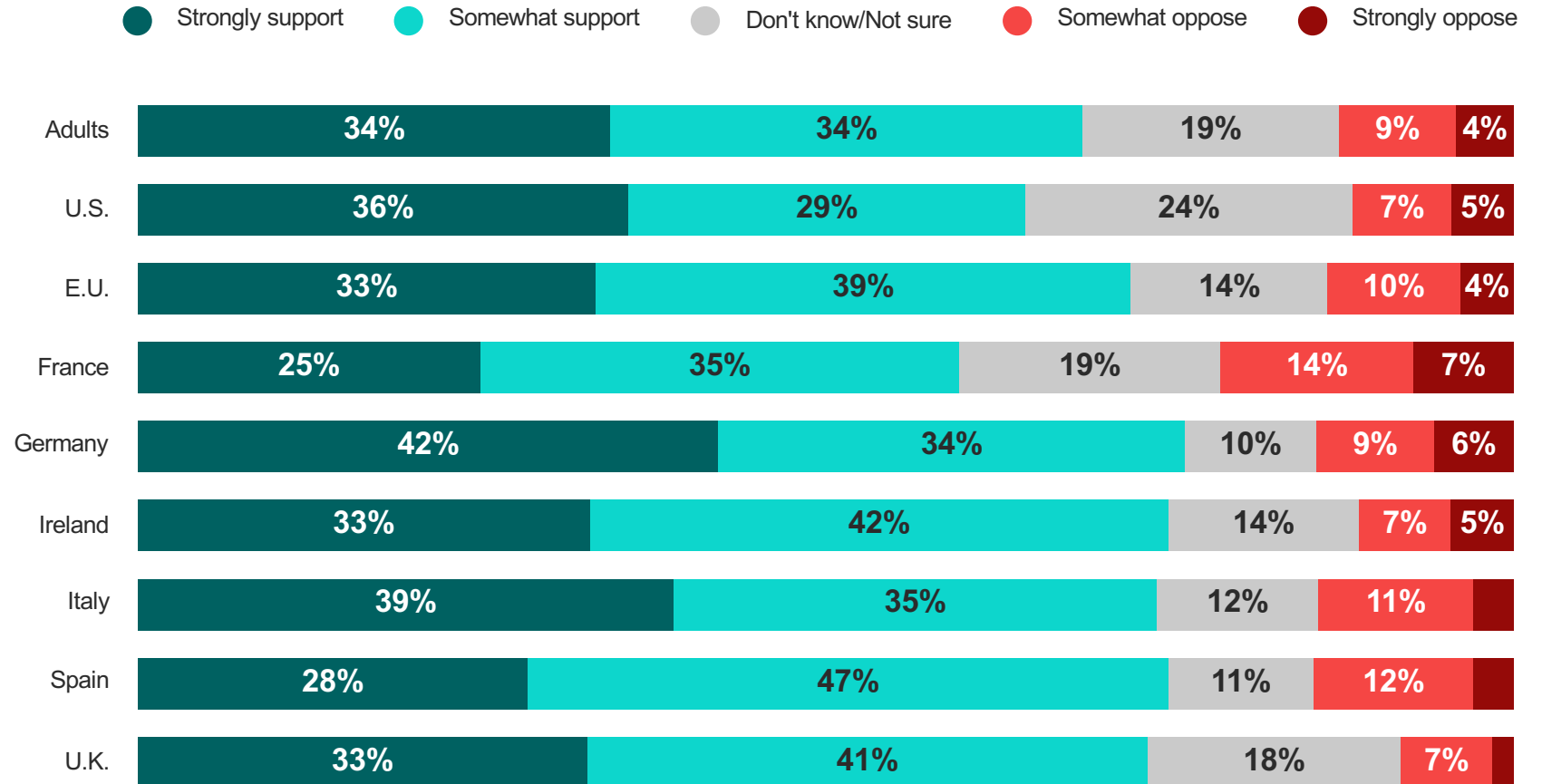
*How much do you agree or disagree that artificial intelligence systems should be transparent and explainable?*



## U.S. + E.U. Opinions on Artificial Intelligence Regulation

**Almost seven in ten (68%) of global respondents support requiring disclosure of information around AI for companies creating, distributing, or commercializing AI systems, with 64% of U.S. and 72% of E.U. respondents supporting required disclosure**

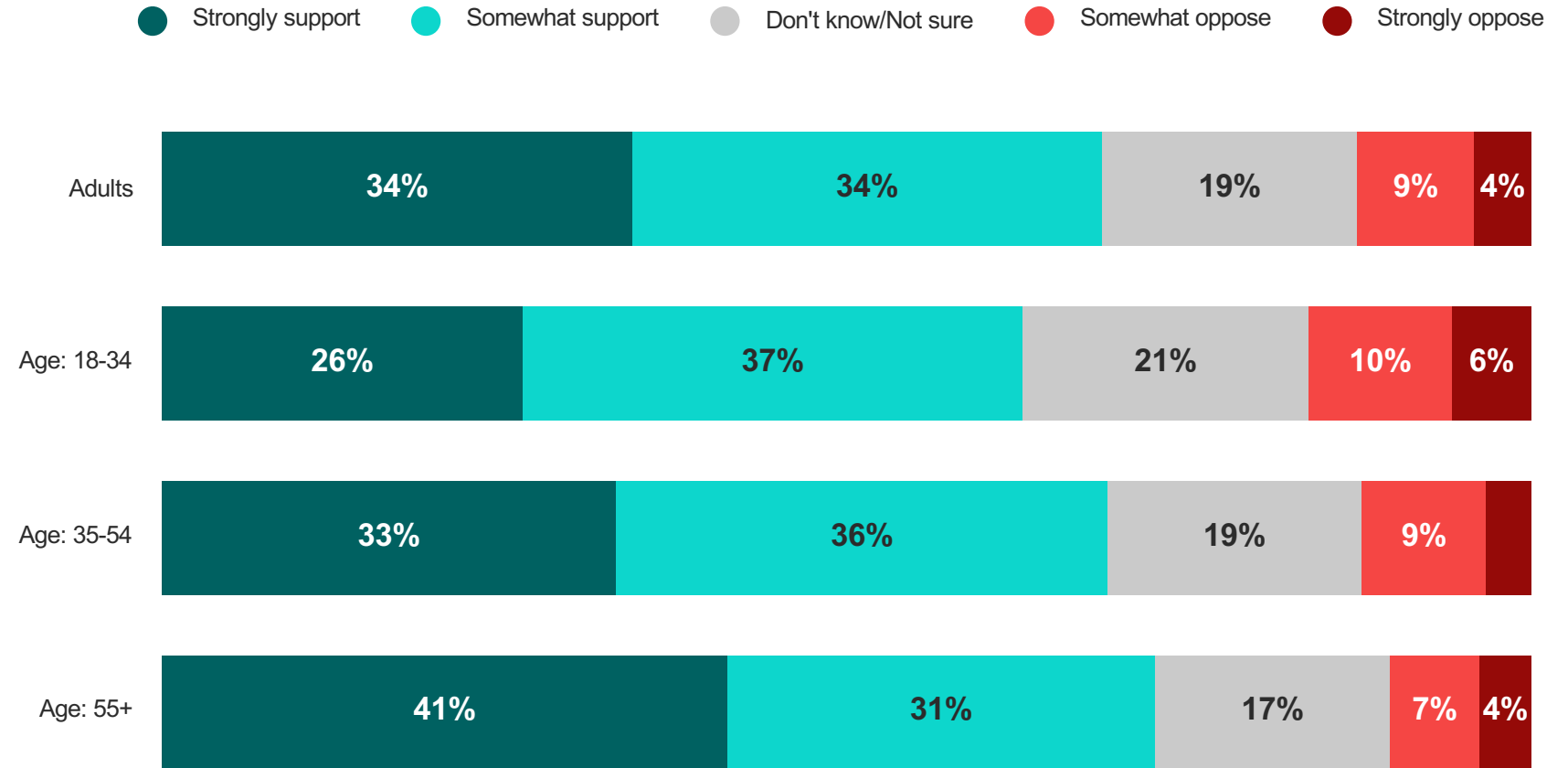
*How much would you support or oppose requiring disclosure (informing), as appropriate, for any company creating, distributing, or commercializing artificial intelligence systems?*



## U.S. + E.U. Opinions on Artificial Intelligence Regulation

## Older respondents are more likely to support requiring disclosure for AI firms than younger respondents, though majorities of all age groups at least somewhat support disclosure

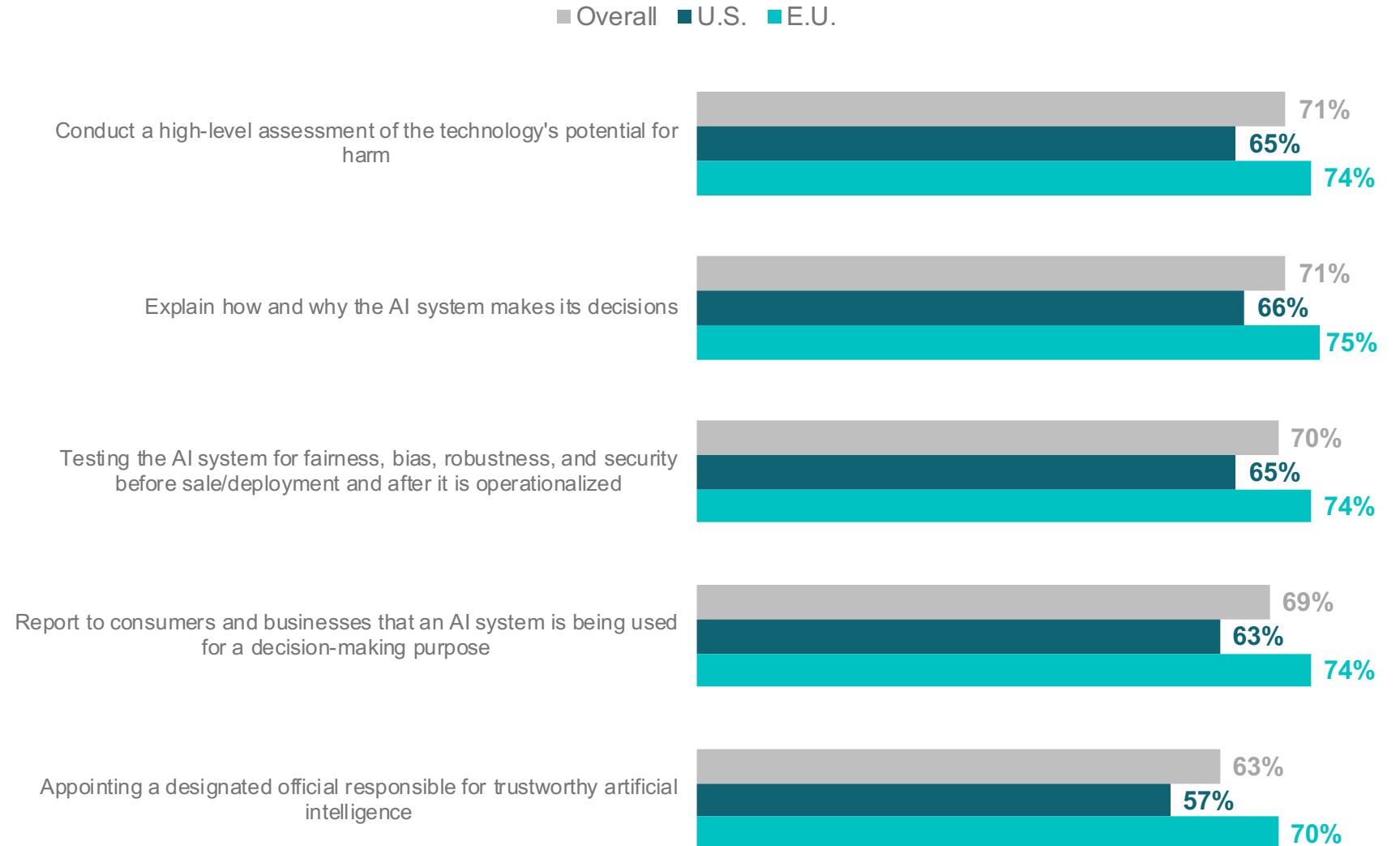
*How much would you support or oppose requiring disclosure (informing), as appropriate, for any company creating, distributing, or commercializing artificial intelligence systems?*



## U.S. + E.U. Opinions on Artificial Intelligence Regulation

## Globally, respondents are more likely to support proposals to conduct high-level assessments of technology's potential for harm and explaining how and why the AI system makes its decisions; U.S. adults are less likely than E.U. adults to support regulation of artificial intelligence

*How much would you support or oppose the following proposals to regulate artificial intelligence?  
[Showing Strongly + Somewhat Support]*

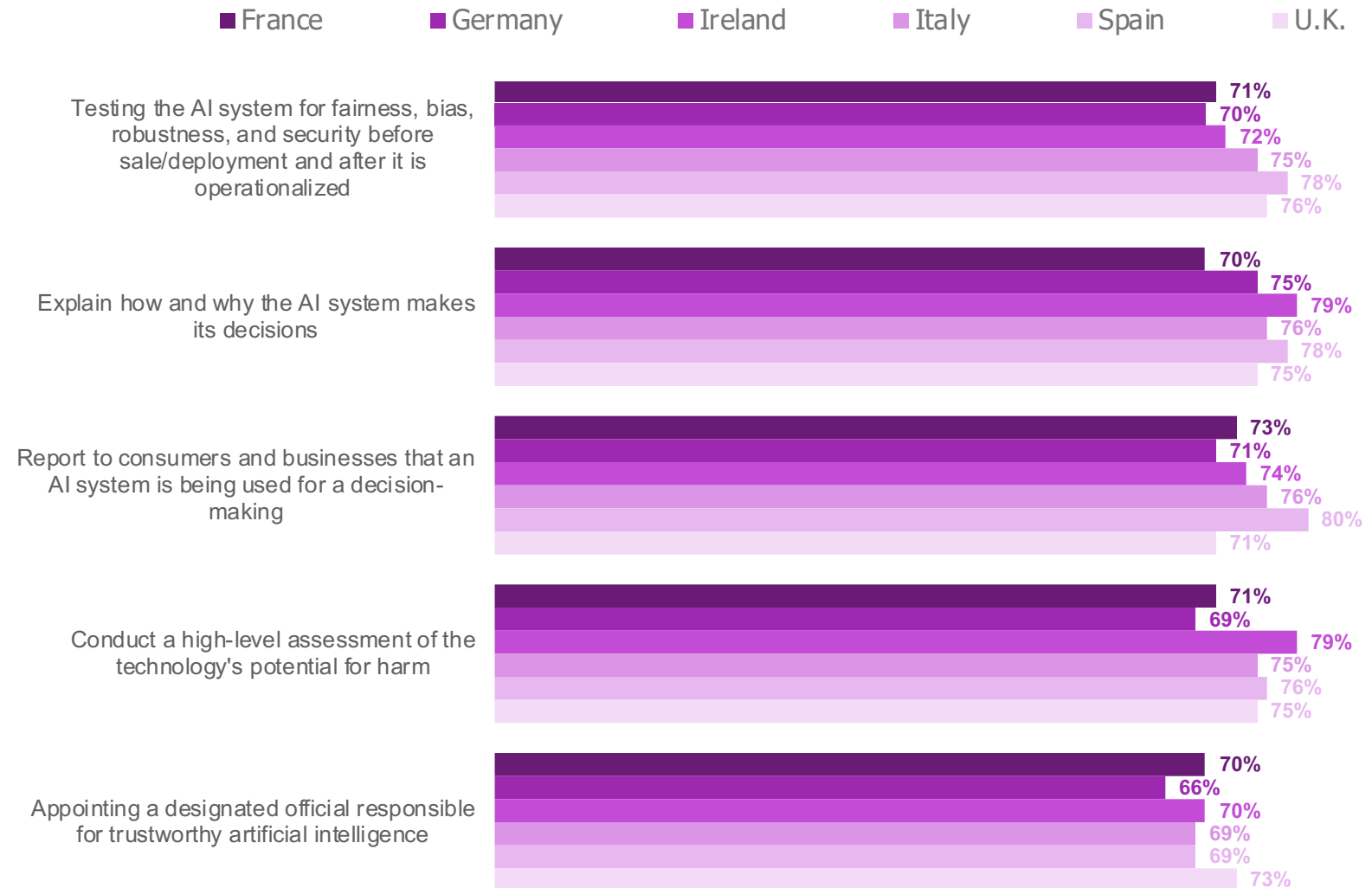


## U.S. + E.U. Opinions on Artificial Intelligence Regulation



**Almost eight in ten (80%) of Spanish respondents support the proposal for testing the AI system for fairness, bias, robustness, and security before sale/deployment and after it is optimized, and almost eight in ten (79%) of Irish respondents support the proposal to explain how and why the AI system makes its decisions**

*How much would you support or oppose the following proposals to regulate artificial intelligence?  
[Showing Strongly + Somewhat Support]*

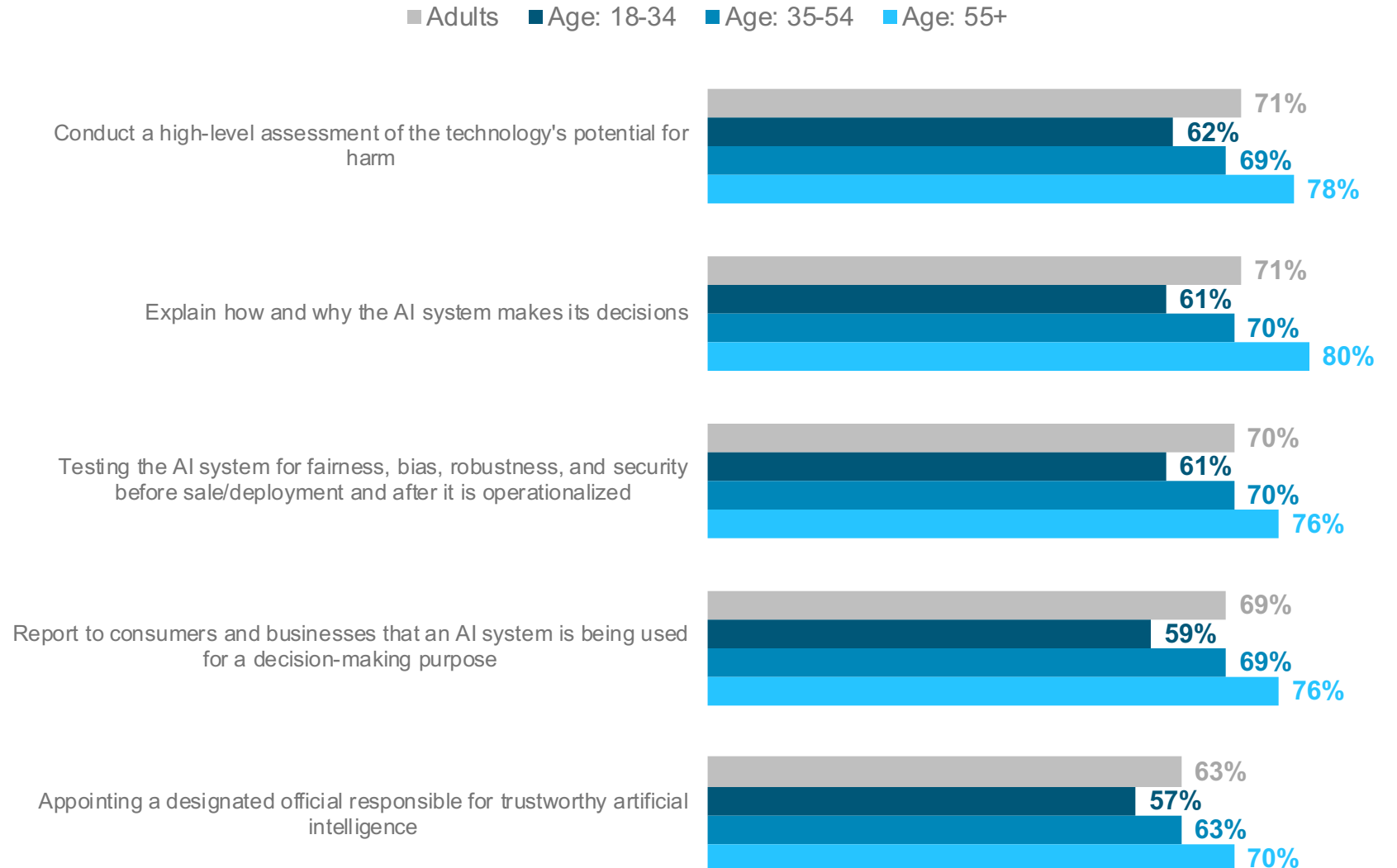


## U.S. + E.U. Opinions on Artificial Intelligence Regulation

## U.S. + E.U. Opinions on Artificial Intelligence Regulation

### Older respondents are more likely to support regulations for artificial intelligence across the board, particularly when it comes to having explanations for how AI makes its decisions.

*How much would you support or oppose the following proposals to regulate artificial intelligence?  
[Showing Strongly + Somewhat Support]*



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