

Family  
Online Safety  
Institute

# Generative AI: Emerging Habits, Hopes and Fears

Conducted by

**KANTAR**

Sponsored by

**Google**

#fosi2023

**Welcome  
from Kantar!**



---

**Chris Carbone**

Senior Director,  
Futures Practice



---

**Kara Sundby**

Senior Director,  
Futures Practice

# Goals for Today

Orient you to the FOSI 2023 study

Share the story of what we learned

Set the stage for panel discussion



## Research Objectives

- Explore awareness levels, perceptions and engagement of both parents and teens toward generative AI (genAI)
- Assess the current understanding and usage of genAI tools
- Deep dive into the perceived benefits as well as risks and concerns
- Identify similarities and differences among parents and teens in the United States, Germany and Japan

## Approach

### Qualitative

- In the US and Germany: Qualitative focus groups
- In Japan: 3-day online journal
- Among parents and teens aged 13-17

### Quantitative

- n=~1,000 (combined parent and teen responses) in the US, Germany and Japan, for n=3,001 sample
- Fielded among parents and their teens aged 13-17 years old

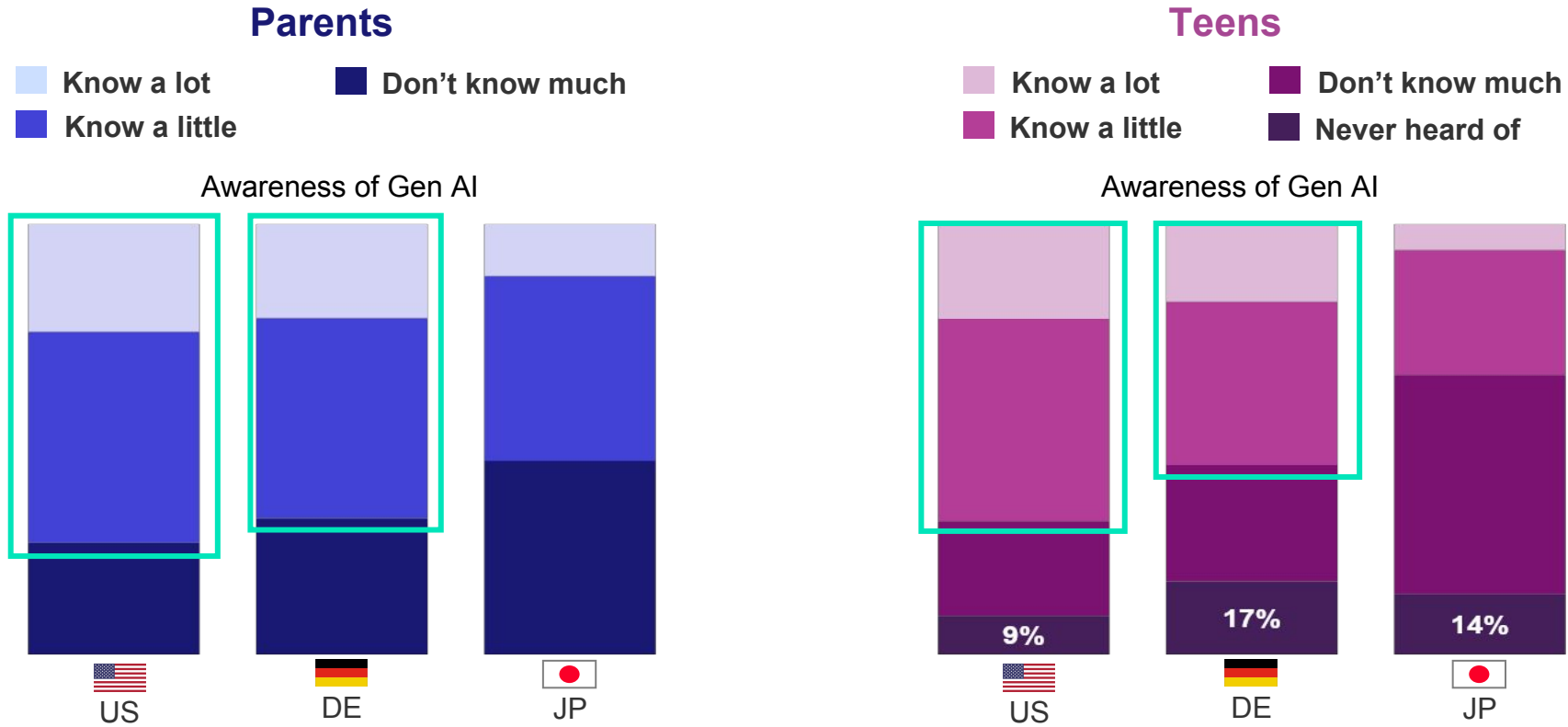


# Setting the Stage

Awareness and usage of  
generative AI

# Parents and teens are fairly matched in their awareness of genAI

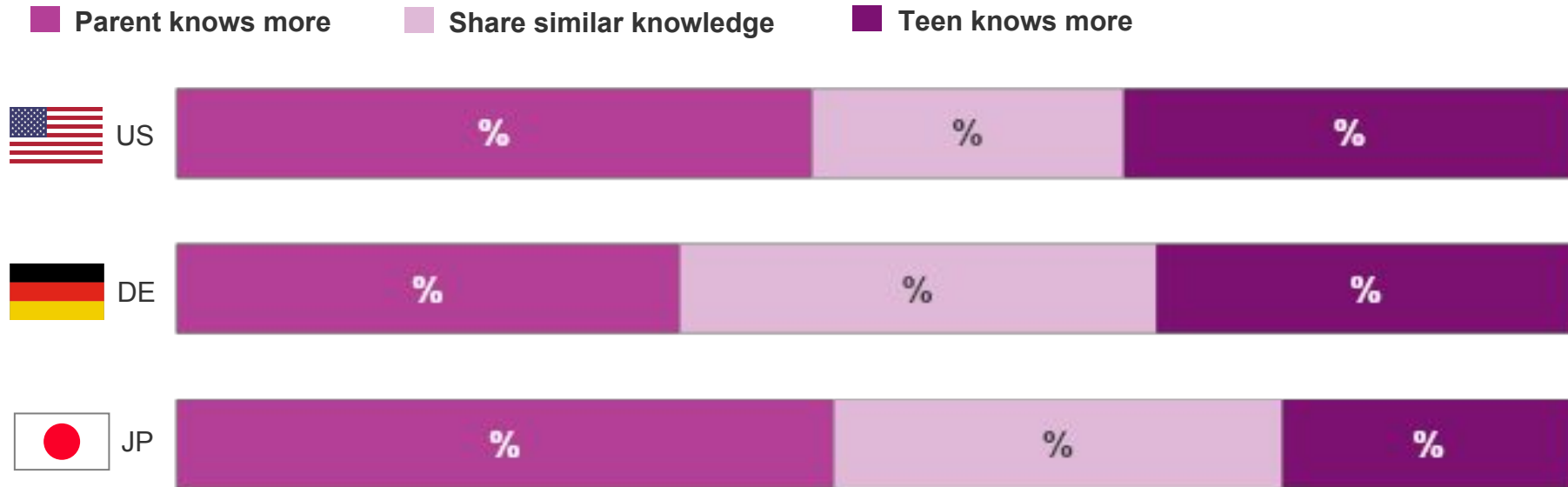
## Awareness of generative AI



\*Parent respondents were terminated if indicated "never heard of"

# Parents are perceived to have an edge over teens – a departure from most other tech topics

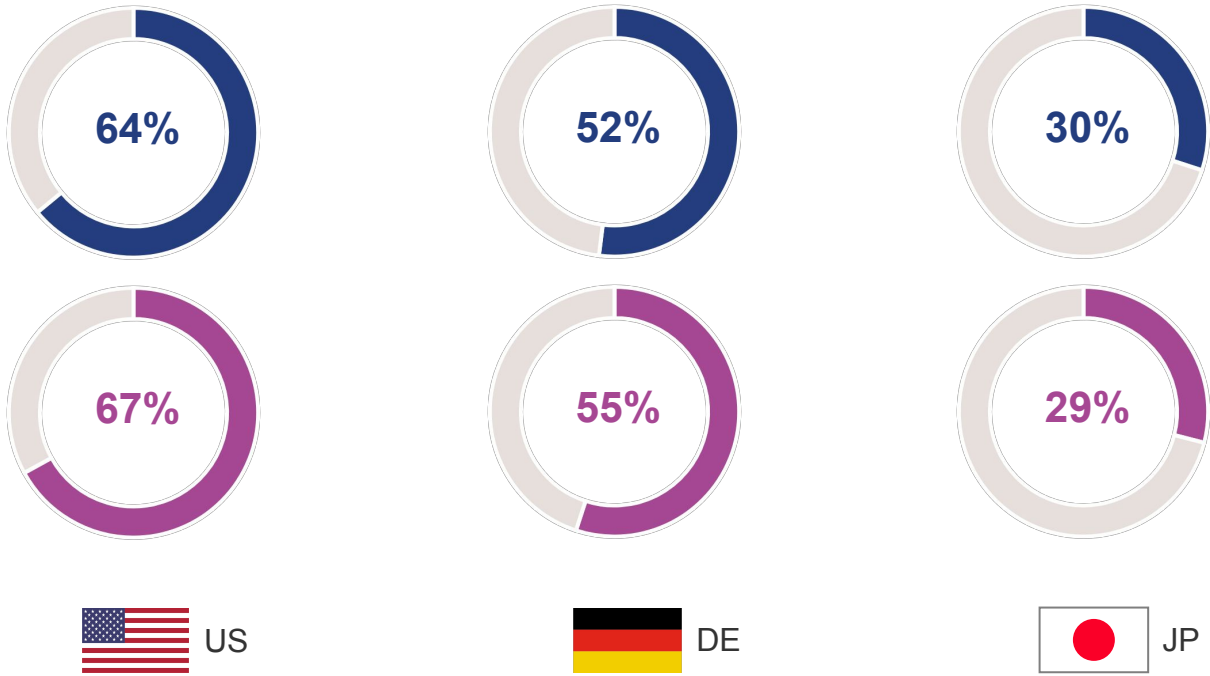
## Teens' perception on who is more knowledgeable about genAI



# Parents and teens are also matched when it comes to their current usage of genAI

## Ever used generative AI (Among those who have used or tried genAI)

■ Parents ■ Teens



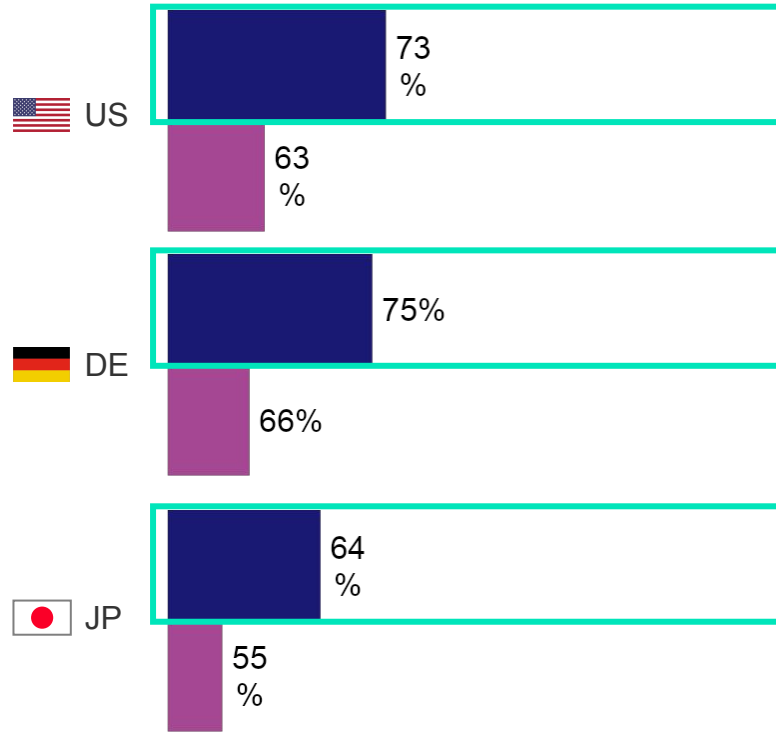


# Parents and teens use genAI in different ways

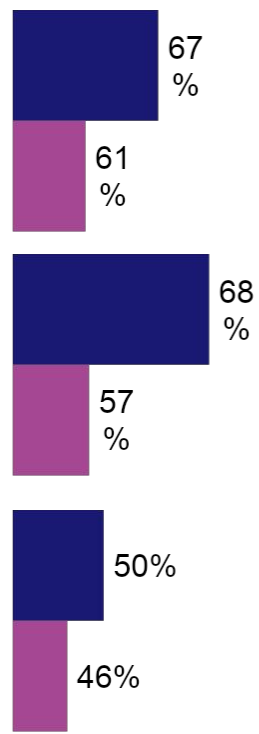
## Top uses of generative AI today (Among those who have used or tried generative AI)

■ Parents ■ Teens

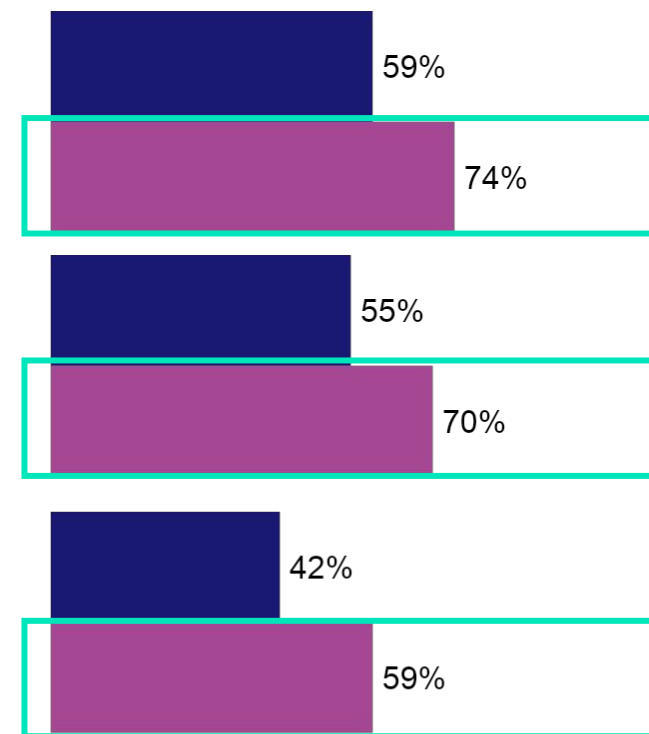
### Analytical Tasks



### Creative Tasks

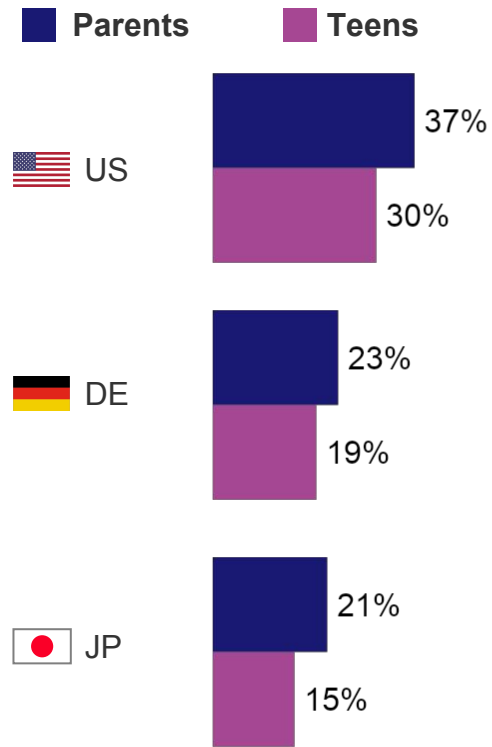


### Efficiency-Boosting Tasks

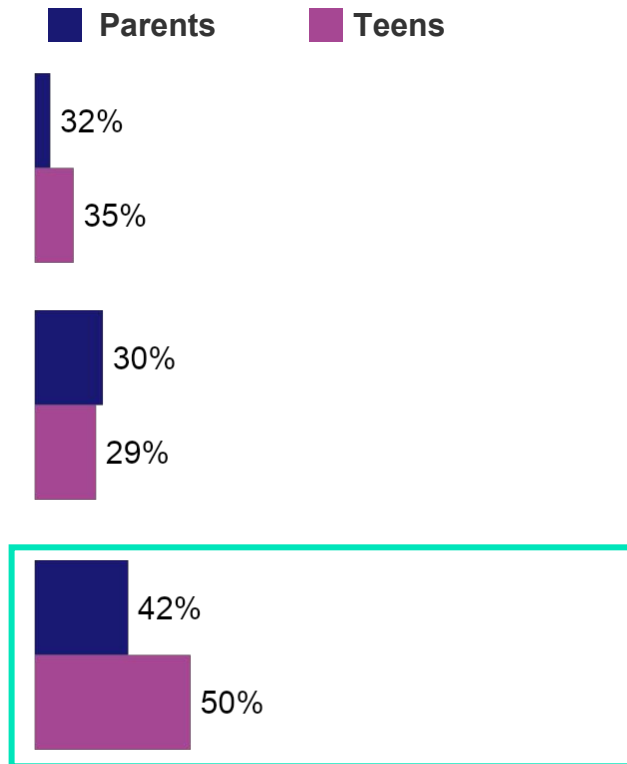


# Using genAI for emotional support is on the horizon

**% currently or have ever used genAI for any type of emotional support today**



**% selected using genAI for emotional support as one of the top 2 ways they are most interested in using in the future**



*“Some people just want to talk to somebody. No matter what the conversation is about. Just because it’s not a real person, doesn’t mean it can’t make a person feel - because words are powerful. At the end of the day, it can always help in emotional and mental way.”*

-- Teen, US



# GenAI Hopes & Fears

Balancing the benefits with  
mitigating concerns

# Top concerns about genAI are at the fore for families

## Parents' and teens' top five concerns or risks of generative AI

Top 5 concerns or risks among all parents and all teens

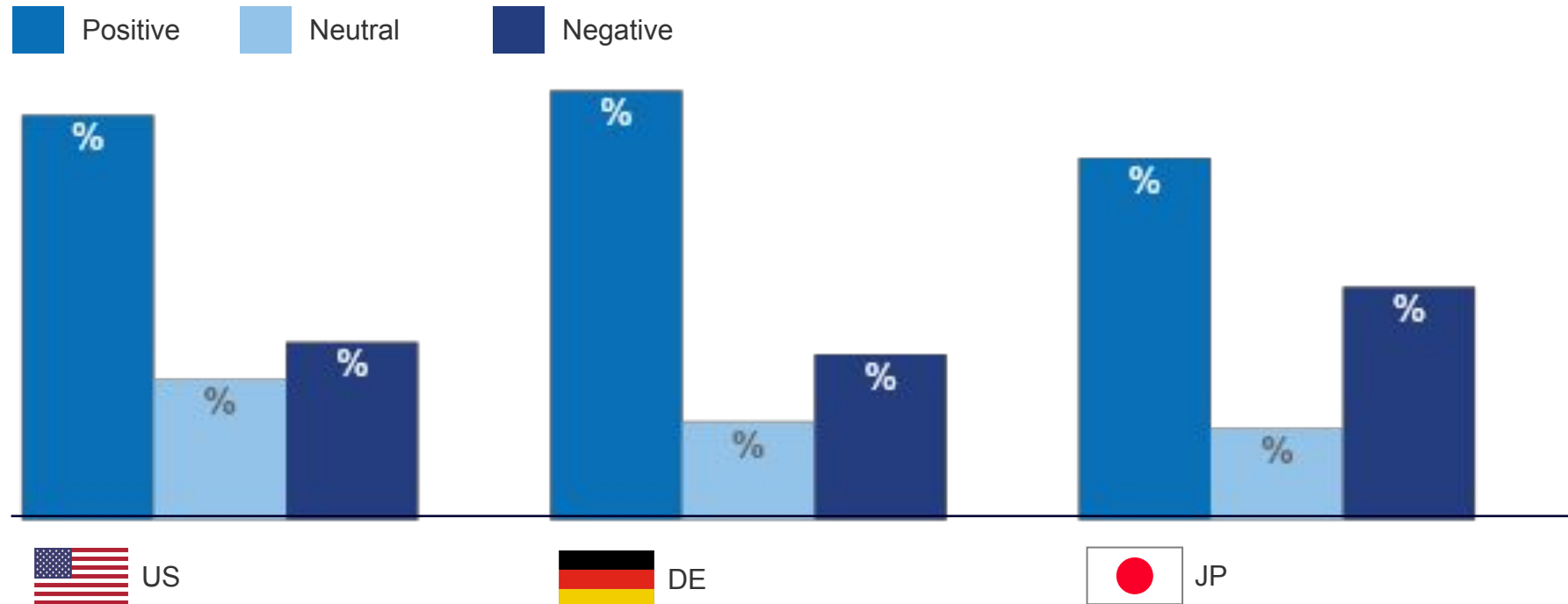


*“The loss of critical thinking is a top concern for me. It’s like the calculator. Can you do it without it? Once you prove that, then you can use the calculator. It’s kind of same thing for me.”*

-- Parent, US

# Despite concerns, optimism prevails

## Parents' sentiment on teens using genAI today



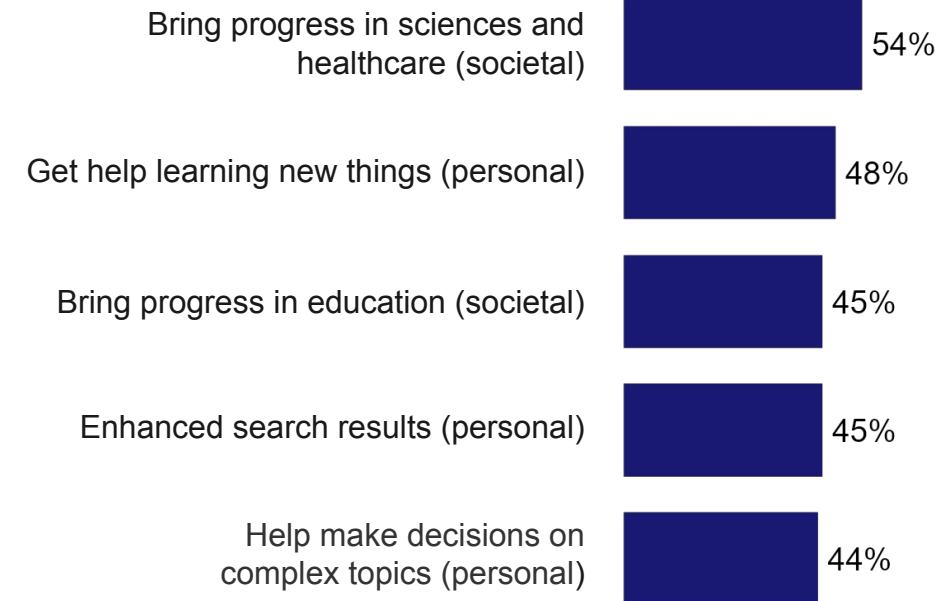
*“Compared to conventional AI, generative AI seems to be able to build more interactive relationships with users. For example, I have been using ChatGPT for a while now, and I have the impression that it can anticipate what I might ask.”*

-- Parent, Japan

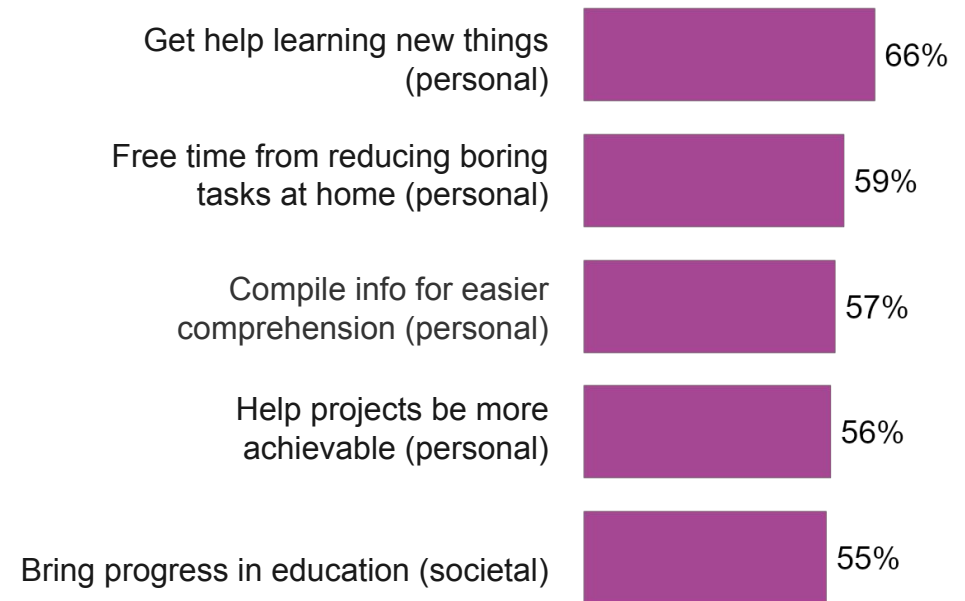
# Parents and teens are excited to embrace the power and potential of genAI

## Top 5 most exciting personal benefits of genAI in the future (Select top two – across personal and societal benefits)

■ All parents



■ All teens

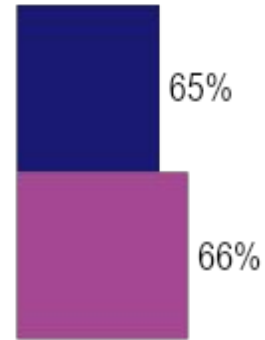


# GenAI is here to stay

Agree more with:

■ Parents ■ Teens

Using genAI tools will be a vital skill to have to remain competitive in school or career vs. society won't rely on it as much as we are talking about it



GenAI will augment or supplement humans, but we'll still need human creativity vs. it will surpass human capabilities and take over many tasks



*“I hope it will coexist with humans and that new AI will start to appear in the world and improve human life. It would also be good to have a human-type AI to help us with housework.”*

-- Teen, Japan



# GenAI Responsibility

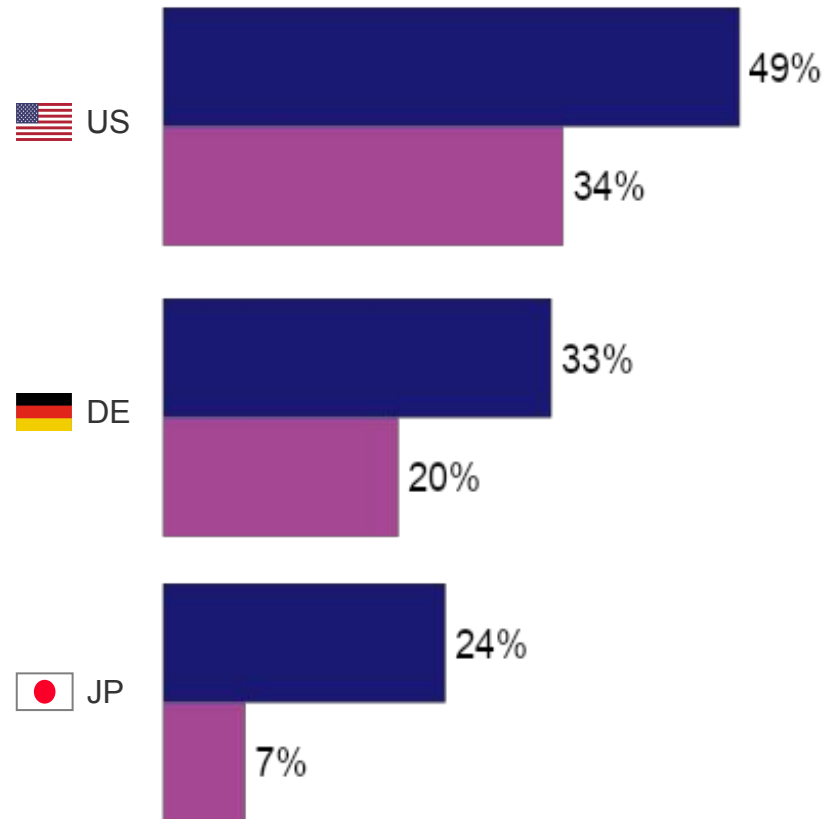
Experience safeguards and  
education



# Parents view themselves as most responsible for securing genAI experiences

■ Parents ■ Teens

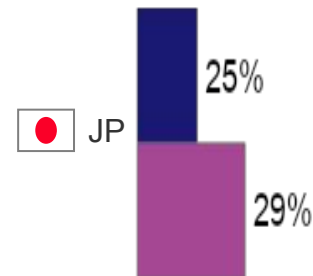
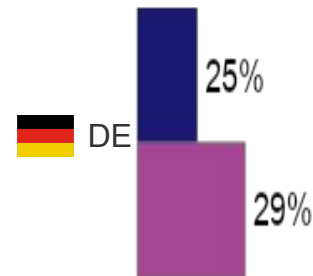
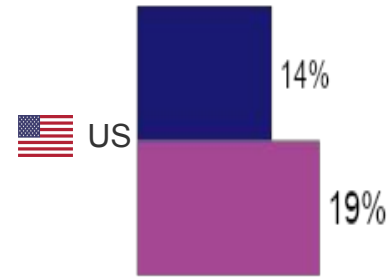
Believe **parents** are the most responsible players in ensuring safe genAI experiences (% selecting most responsible)



# Parents also look to governments, followed by companies for support

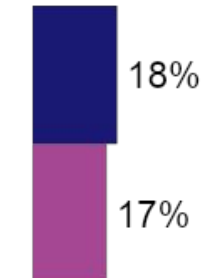
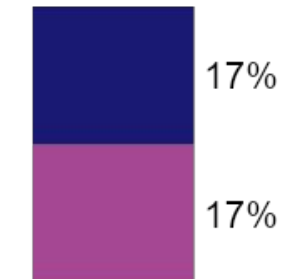
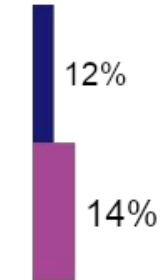
■ Parents ■ Teens

Believe **governments** are the most responsible players in ensuring safe genAI experiences  
(% selecting most responsible)



■ Parents ■ Teens

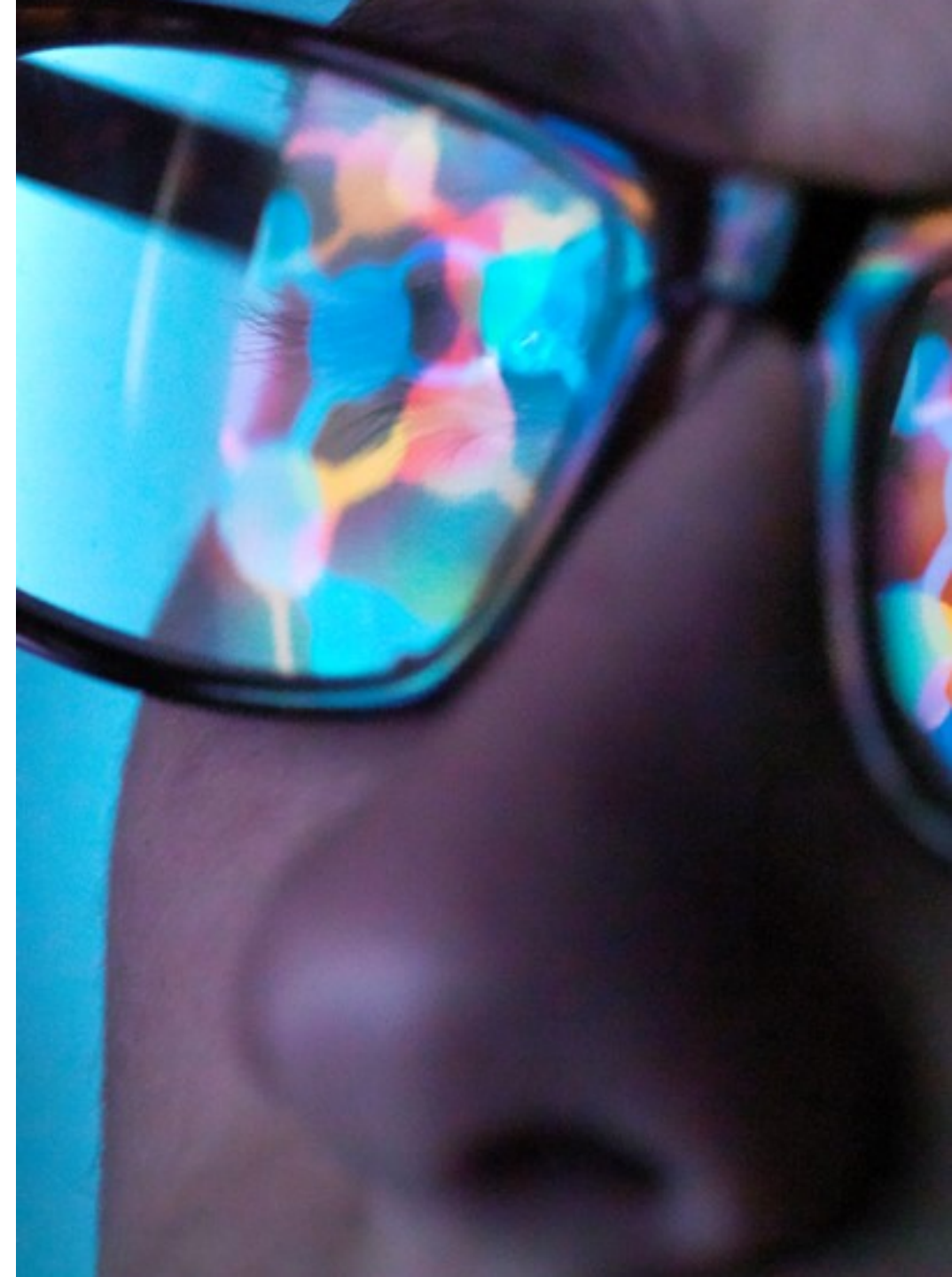
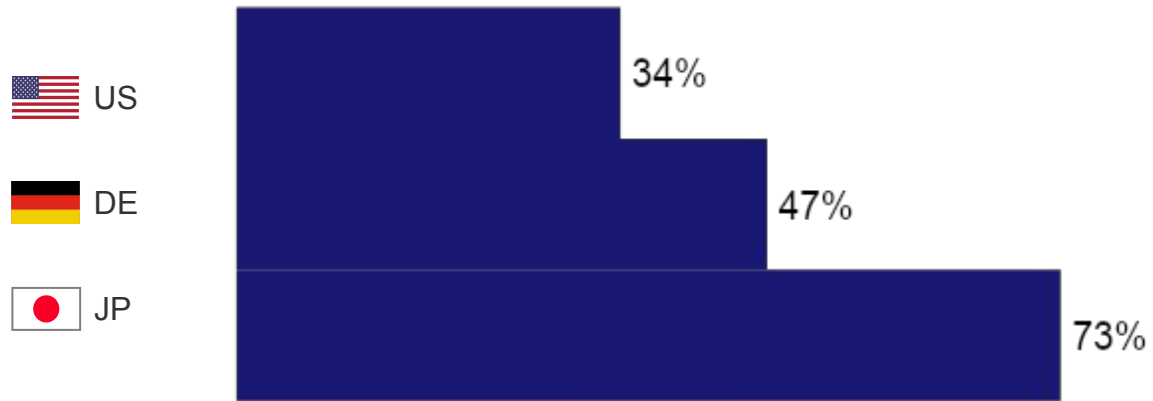
Believe **companies** are the most responsible players in ensuring safe genAI experiences  
(% selecting most responsible)



# Parents need more information

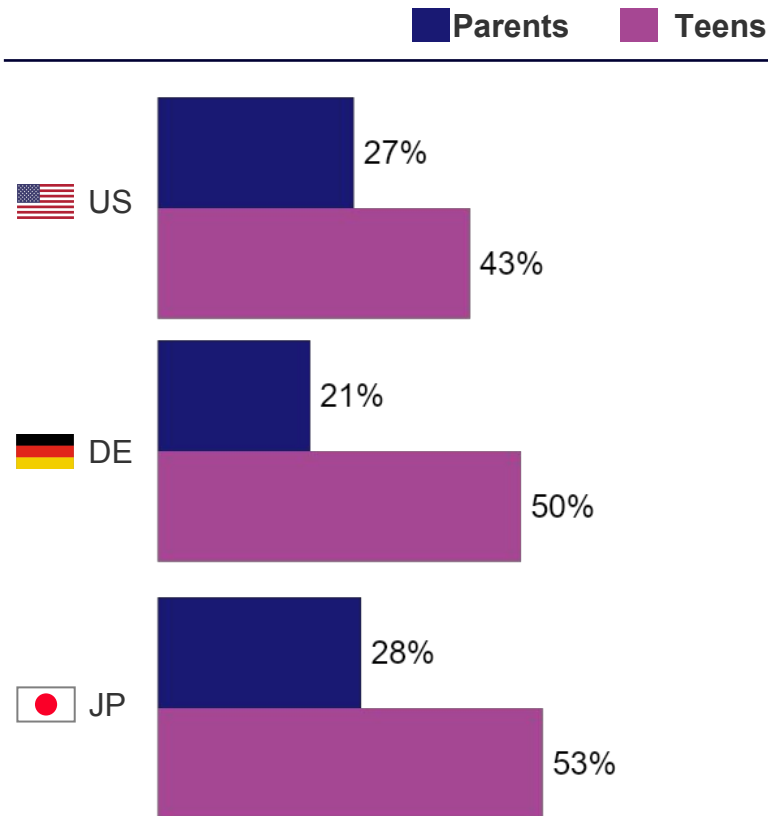
**% of parents that say they need more information about genAI to have a meaningful conversation with their teen on how they can safely use it**

---

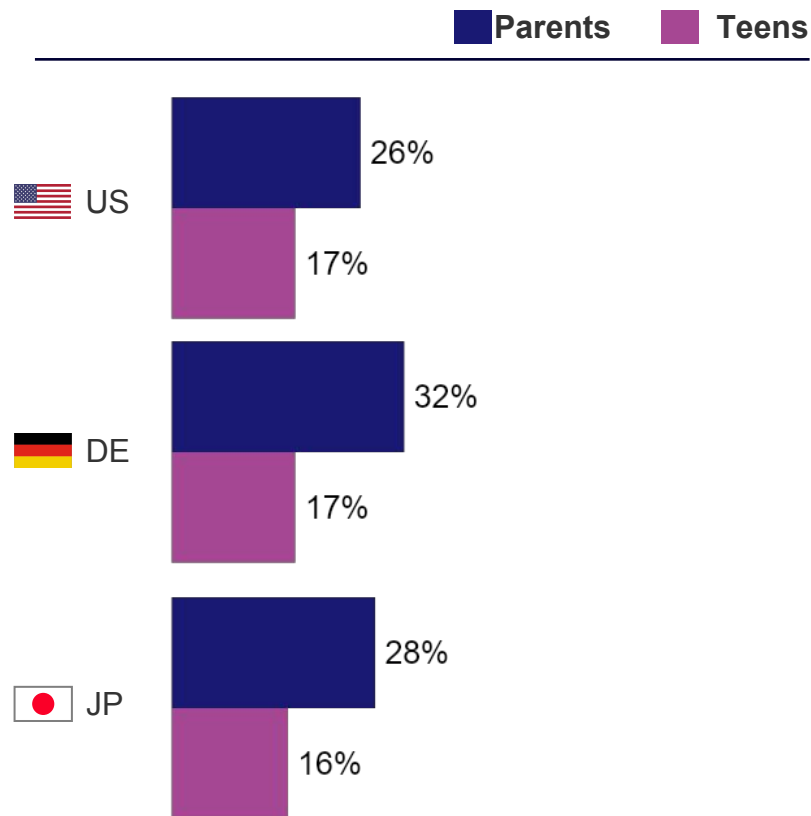


# People want to learn about genAI from trusted sources

## Prefer to learn about genAI from schools



## Prefer to learn about genAI from companies / platforms



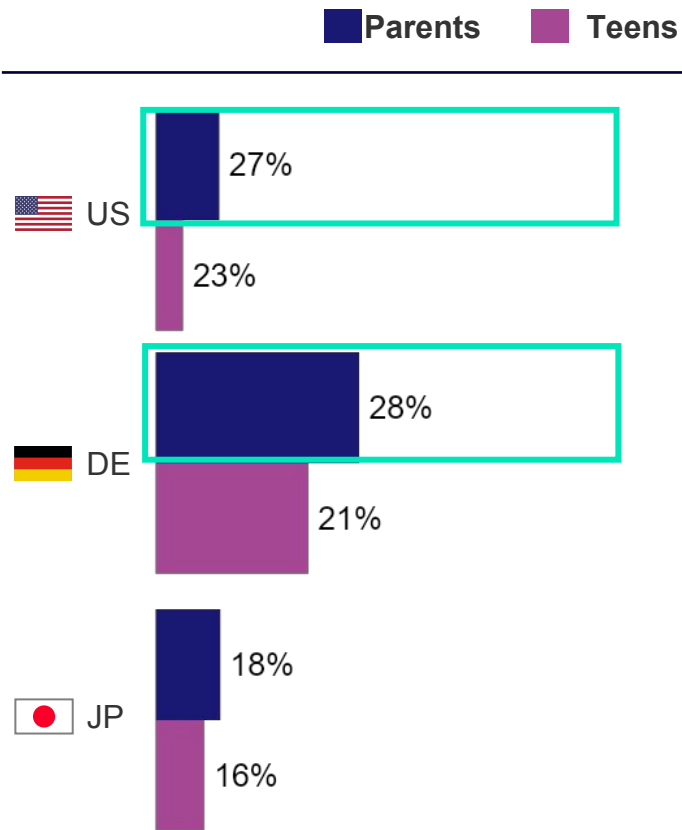
*“I actually like trying new things, but I am insecure where the journey will lead us. That’s why I attend this seminar on AI in school, I hope they can take away my fears and show me how to implement it usefully. I will take my son along, too!”*

-- Parent, Germany

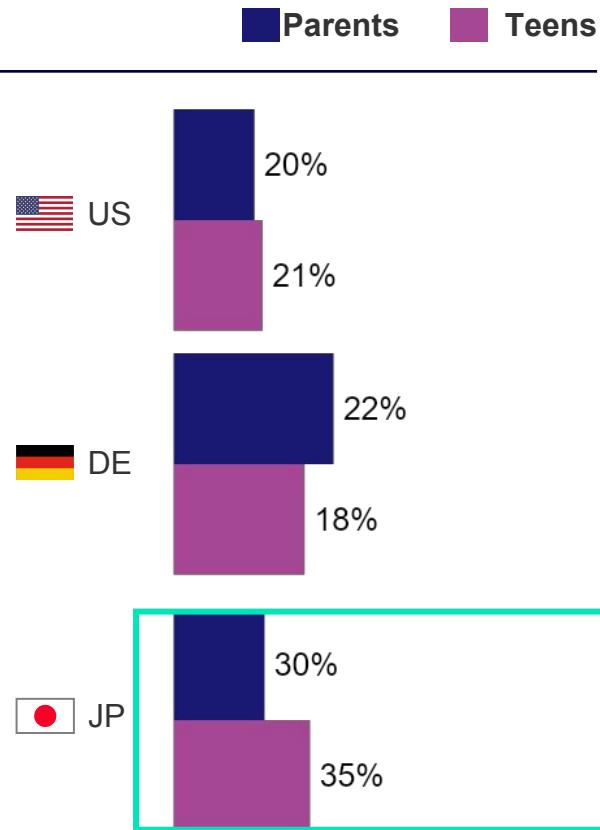
# Parents want to learn about genAI from classes; and teens from social media

Teens' interest in education from schools while gravitating toward social platforms presents an opportunity.

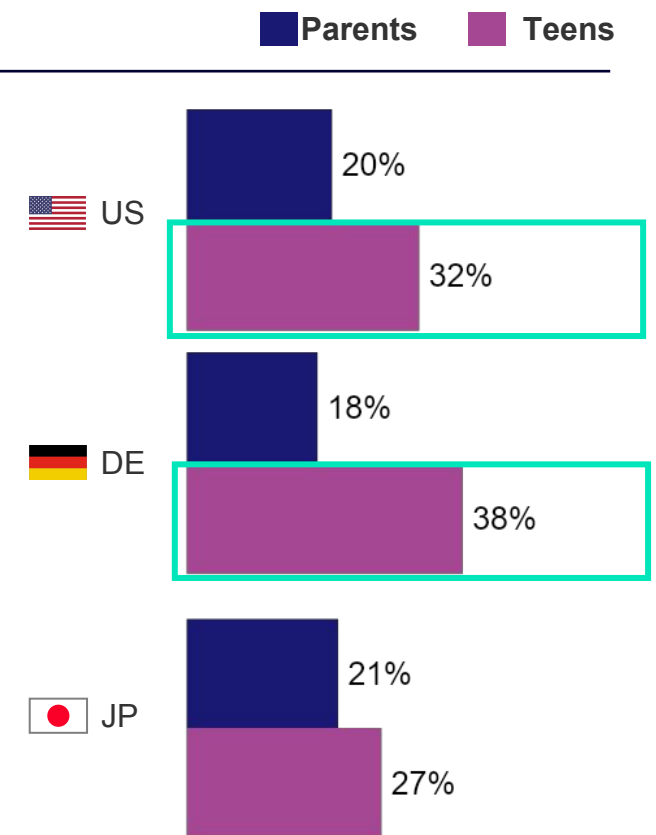
## Prefer to receive info about gen AI via online classes



## Prefer to receive info about genAI via in-person classes



## Prefer to receive info about genAI via social media



# Data transparency is the most critical topic

## Top 3 factors that would help address many of their concerns about genAI

■ Parents ■ Teens

Country	Factor	Rank	Target Audience
US	Data transparency	#1	Parents
	Age-appropriate settings	#2	Teens
	More information on genAI in general	#3	Teens
DE	Data transparency	#1	Teens
	Courses that teach teens about genAI	#2	Teens
	Age-appropriate settings	#3	Teens
JP	Data transparency	#1	Teens
	More about genAI risks and how to control them	#2	Teens
	Age-appropriate settings	#3	Teens



# What can parents and industry do?

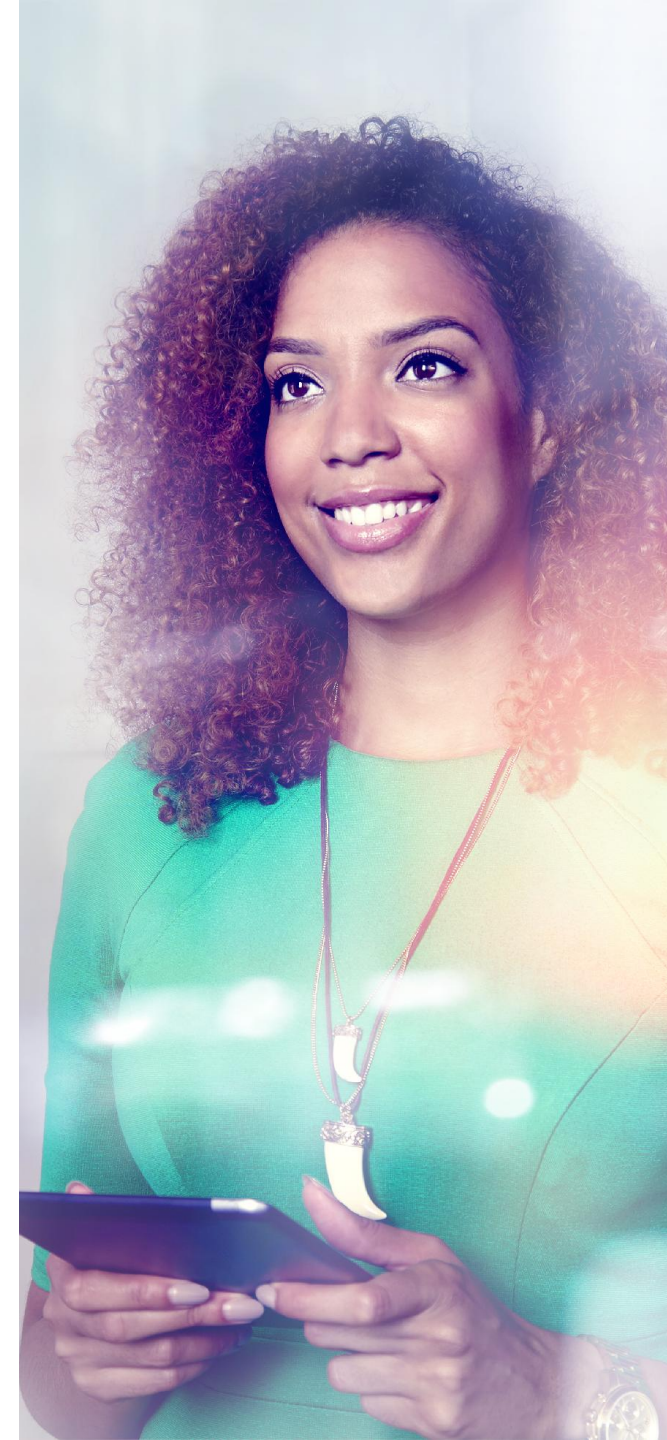
Guidance for navigating genAI  
use for parents and suggestions  
for developing industry best  
practices

## For parents: guidance for navigating genAI use

1 Engage with genAI. Stay attuned to information and embrace the genAI learning curve.

2 Keep an open dialogue with teens and take an active interest in their digital lives. Actively educate teens about gen AI's risks and benefits.

3 Teach teens to wield its power wisely by encouraging use that enhances – not overtakes – their lives.





# For industry: suggestions for developing best practices

- 1 Work to make genAI solutions accessible and user-friendly for global markets.
- 2 Create transparent messaging and education to encourage clarity about how genAI works and how data is sourced.
- 3 Include the perspectives of a diverse set of stakeholders.
- 4 Prioritize future research that will create an evidence base for legislative decisions around genAI.





Family  
Online Safety  
Institute

**Generative AI:  
Emerging Habits, Hopes and Fears**

**Thank you and  
enjoy #fosi2023!**

Conducted by

**KANTAR**

Sponsored by

**Google**

#fosi2023