Family Online Safety Institute

2023 RESEARCH REPORT

GENERATIVE AI

EMERGING HABITS, HOPES AND FEARS

Conducted by KANTAR

Sponsored by Google

While other forms of artificial intelligence have been around for many years – from Google Translate to Siri to autocorrect – generative AI made an impressive public debut with the launch of ChatGPT one year ago this month.

Since that time, a proliferation of genAI tools and platforms have emerged including Bard, Claude, Dall-E2 and Midjourney. The recently released ChatGPT4 allows users to upload photos and files and then generate reports, descriptions and analysis of the content. Based on a photo of the inside of your fridge, it can come up with suggested meals and how to prepare them. And we're only at the beginning of what's possible.

The implications of this new technology on teens and their parents are many. How will genAI affect how kids are taught in school and do homework? What will the impacts - both positive and negative - be on job prospects for parents, and the teens who will soon be entering the market? Who will bear responsibility for the negative influence that genAI tools may bring in the form of disinformation and deepfakes?

We set out with these and many other questions as we surveyed teens and parents across the US, Germany, and Japan about their use of genAI and what their hopes and fears are for this fast moving technology. We found curiosity and optimism, though there are plenty of concerns right below the surface. While many express a sense of inevitability about genAI's advances, there also remains a hopeful caution that we may be able to harness this latest technological revolution in a way that serves society and individuals alike.

Stephen Balkam, CEO Family Online Safety Institute
November 2023

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About this study:

This study was conducted by Kantar on behalf of the Family Online Safety Institute. It explores the current awareness levels*, perceptions and engagement of both parents and teens toward generative AI (genAI).

The goal of the study is to assess the current understanding and usage of generative AI tools among parents and teens, including their perceived benefits as well as risks and concerns.

The study delves into the emerging habits, the hopes, and the fears of parents and teens when it comes to this powerful technology. Research was conducted in the United States, Germany, and Japan. This multi-country approach points to interesting similarities and differences in how parents and teens view generative AI in their market today.

*After capturing their unprompted awareness along with open-ended examples of generative AI, parents and teens were given two definitions to help clearly distinguish between traditional and generative AI. The two definitions given were as follows:

- **Traditional AI:** A system that focuses on performing a specific task intelligently. It responds to set of inputs and has the capability to learn from data and make decisions or predictions based on that data.

- **Generative AI:** A system capable of generating new text, images, or other media in response to prompts, based on data that already exists.

Methodological Overview

This study was conducted in a two-phase approach, including both qualitative and quantitative elements:

Phase I: Qualitative Focus Groups and Journal

28 parents and 30 teens participated across the US, Germany (DE), and Japan (JP).

Qualitative focus groups with parents and teens aged 13-17 were conducted in the US and Germany, and parents and teens were interviewed separately. The US and German focus groups were conducted from July 6 - July 12, 2023.

A qualitative, 3-day online journal activity was conducted in Japan only. The qualitative journal activities were conducted from July 11 - July 13, 2023.

US	DE	JP
n= 7 Parents n= 9 Teens	n= 11 Parents n= 11 Teens	n= 10 Parents n= 12 Teens

The qualitative work informed the design of the online survey for Phase II.

Phase II: Quantitative Survey

An online quantitative study was conducted across the US, Germany, and Japan. Both parents and their teens participated in the same survey, where the parent completed the first half and their teen the second. 1000 surveys (combined parent and teen responses) were completed in each of the three countries, for a total sample of ~3,000 parents and ~3,000 teens. The quantitative survey was fielded among parents and teens aged 13-17 years old.

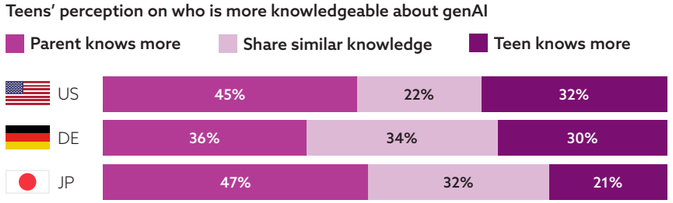
KEY LEARNINGS

1

When it comes to generative AI, teens and parents are fairly evenly matched in their awareness of the technology – a departure from most other tech topics.

What's more, teens agree that parents have an edge in the perceived understanding of it, at least for now. Nearly half of US and Japanese teens (**45%** and **47%**, respectively) believe that their parents know more about genAI than they do, with roughly one-third of German teens (**36%**) saying the same.

Teens' perception on who is more knowledgeable about genAI



2

Two family-specific concerns about genAI include cyberbullying and loss of critical thinking skills.

Top concerns about generative AI include some unsurprising topics, likely driven by recent mass media coverage on the following elements: potential job loss, misinformation and AI surpassing human capabilities. However, this research uncovers two concerns specific to families: cyberbullying and loss of critical thinking. Teens are acutely aware of the potential for genAI to be used for more sophisticated means of bullying, or to create new or intensified forms of harassment. From parents' perspective, many express trepidation that their teens will lose opportunities to engage in deep analysis, original ideas and meaningful thinking.

Top 5 concerns or risks among all parents and all teens

Parents		Teens
Job loss	#1	Job loss
Spread of false information	#2	Spread of false information
Loss of critical thinking skills	#3	AI surpassing humans
AI surpassing humans	#4	**New forms of harassment / cyberbullying**
Growing dependency on genAI	#5	Growing dependency on genAI

3

Despite their concerns, a majority of parents feel positive about their teens using genAI.

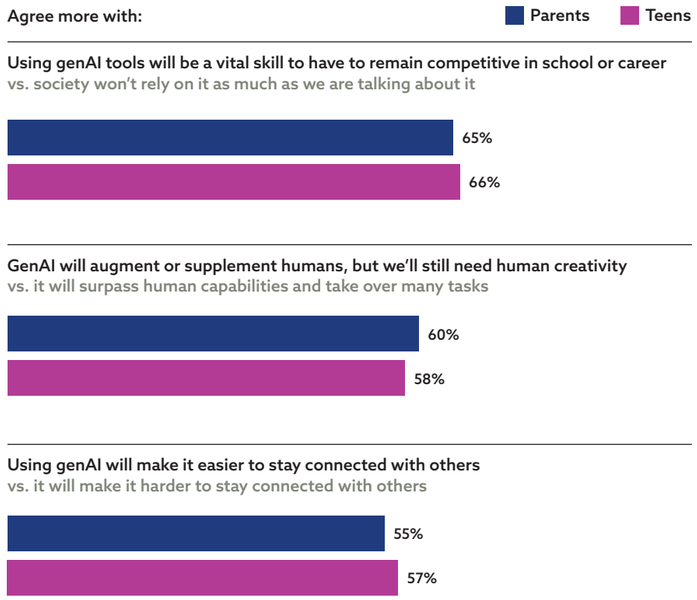
Having experienced the proliferation of mobile devices and social media, parents are clear-eyed about both the costs and benefits of genAI even as these tools are just emerging.

Parents' sentiment and perception of teens using genAI today: feel positive

4

Most parents and teens expect and accept that genAI is here to stay and that it will be more embedded and ubiquitous in work, school, and their personal lives.

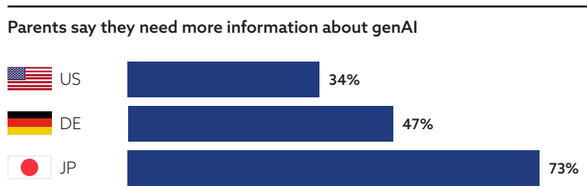
They recognize that they must adapt and learn to use genAI to complement their human abilities if they are to thrive in future academic and work settings.



5

Today, a majority of Japanese parents and nearly half of German parents say that they don't have enough information and education about genAI.

In order to have meaningful conversations with their teens about these tools, parents express that they need more information on genAI, a challenge that is intensified by the rapid pace of change in the field.



6

Transparency is critical to addressing parents' genAI concerns.

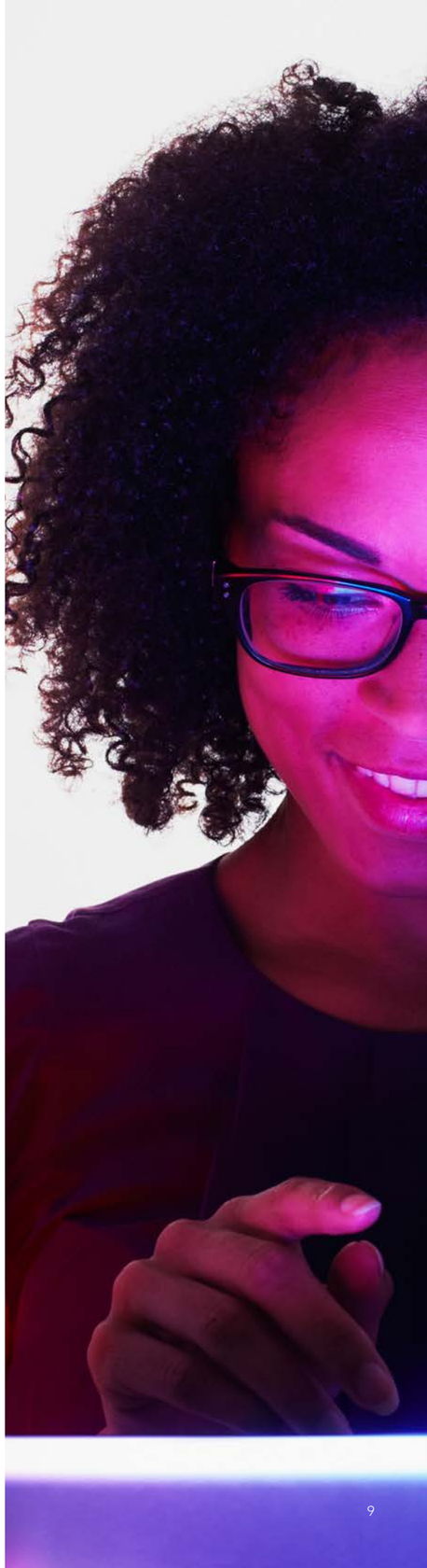
Parents and teens rank transparency of data practices as one of the top factors that would address many of their genAI concerns – with the exception of Japanese teens, who indicate that school classes and requirements would help alleviate their worries. Nearly half of all parents want more transparency as to the authenticity of the data. Transparency about the origin of the data is also on parents' minds.

Top 3 factors that would help address concerns about genAI

US	Parents		Teens
	Data transparency	#1	**Data transparency**
	Age-appropriate settings	#2	More information on genAI in general
	More information on genAI in general	#3	Tools or software that check the validity of genAI data

DE	Parents		Teens
	Data transparency	#1	Courses that teach teens about genAI
	Courses that teach teens about genAI	#2	**Data transparency**
	Age-appropriate settings	#3	More information on genAI in general

JP	Parents		Teens
	Data transparency	#1	More about genAI risks and how to control them
	More about genAI risks and how to control them	#2	Government regulations on genAI
	Age-appropriate settings	#3	GenAI use being required in schools



SECTION 1

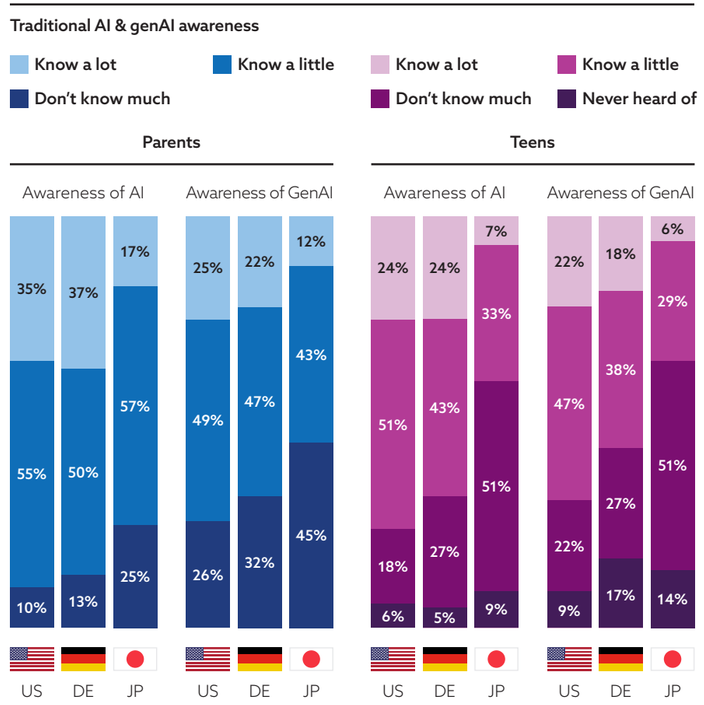
Evaluating awareness of genAI

Parents and teens in the US and Germany are fairly equally matched in how aware they are of generative AI.

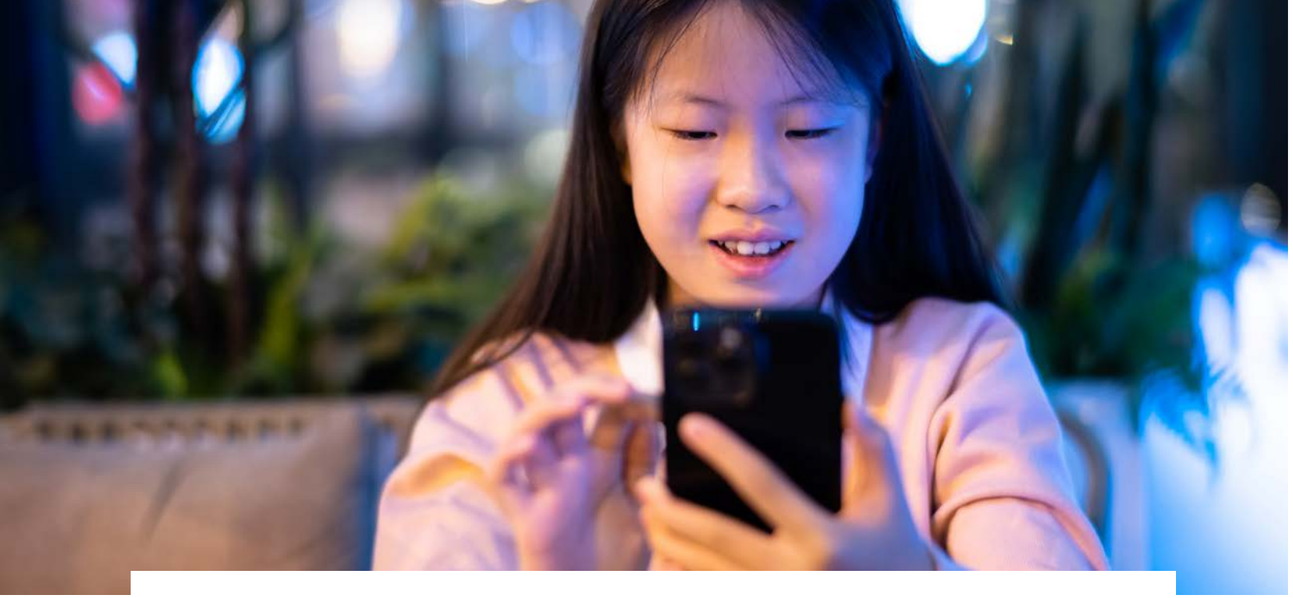
A majority have heard of genAI, with parents slightly edging out teens in terms of awareness: **74%** of parents vs. **69%** of teens in the US, and **69%** of parents vs. **56%** of teens in Germany. In Japan, where there is currently a limited range of Japanese-language genAI platforms available, awareness is lower. Japanese parents considerably outpace their teens on awareness: **55%** of parents vs. **35%** of teens indicate they know about it.

When looking at those who profess to know "a lot" about generative AI, the country chasm widens. Approximately one quarter of parents and teens in the US and Germany say they know "a lot" about generative AI, compared to only **12%** of Japanese parents and **6%** of Japanese teens.

While there is less familiarity with generative AI than traditional AI among parents, teens express the same level of familiarity across both technologies. This could be because they are less clear about the distinction between the two.



*Parents terminated if indicated "never heard of"



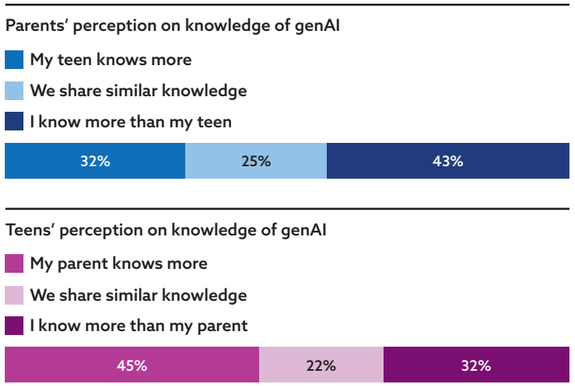
Despite teens being similarly in-the-know about generative AI as their parents, parents are perceived to be more genAI savvy.

Parents are assumed to have a better practical understanding of it. Nearly half of US and Japanese teens (**45%** and **47%**, respectively) believe that their parents know more about genAI than they do, with roughly one-third of German teens (**36%**) saying the same. The perception that parents know more about genAI may also be driven by teens' expressed uncertainty about the differences between traditional AI and generative AI; although after being given definitions of each type of AI, teens still admit their parents know more.

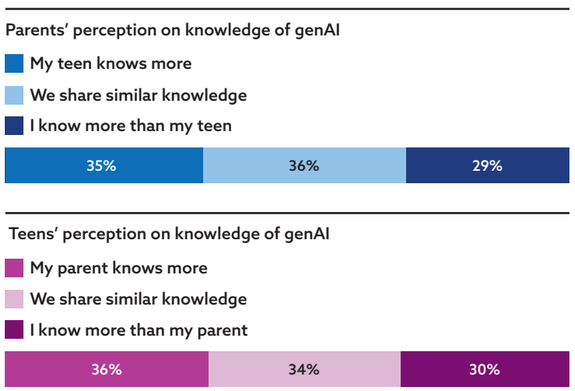
Parents agree that they edge out their teens as the family genAI authority, especially in the US. **43%** of US parents feel they are more knowledgeable than their teen, while only about one-third of parents in Germany (**29%**) and parents in Japan (**33%**) are confident in their superior knowledge of genAI.

This is highly differentiating compared to other tech topics, where teens are naturally more confident that they are savvier than their parents, and parents typically agree.

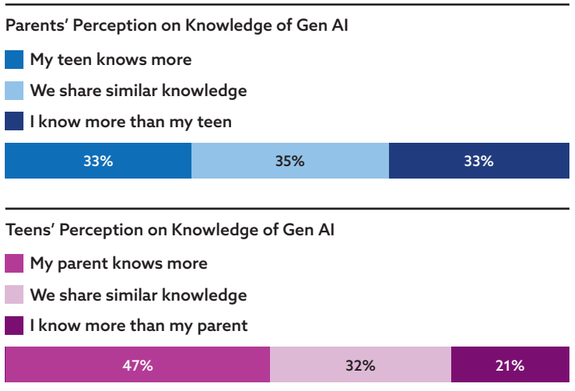
US



DE

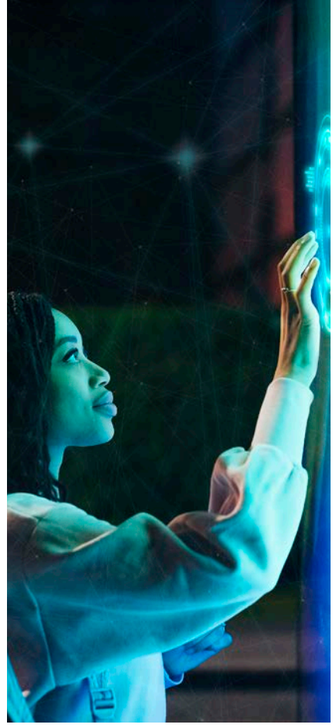


JP



SECTION 2

Exploring how parents and teens are using genAI

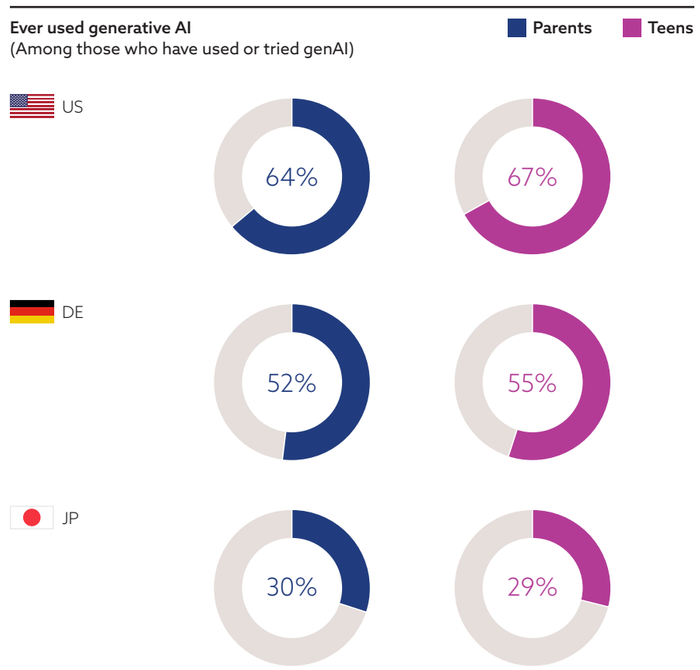


Across all three countries, parents and teens are also evenly matched when it comes to their current uptake of generative AI.

Two-thirds of parents (**64%**) and two-thirds of teens (**67%**) in the US have used or tried using genAI versus over half of German parents (**52%**) and German teens (**55%**). 3 in 10 Japanese parents (**30%**) and Japanese teens (**29%**) say the same.

Countries with higher awareness also indicate higher usage of genAI. This is particularly evident in the US and Germany, where higher general awareness corresponds with a higher share of households using it.

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



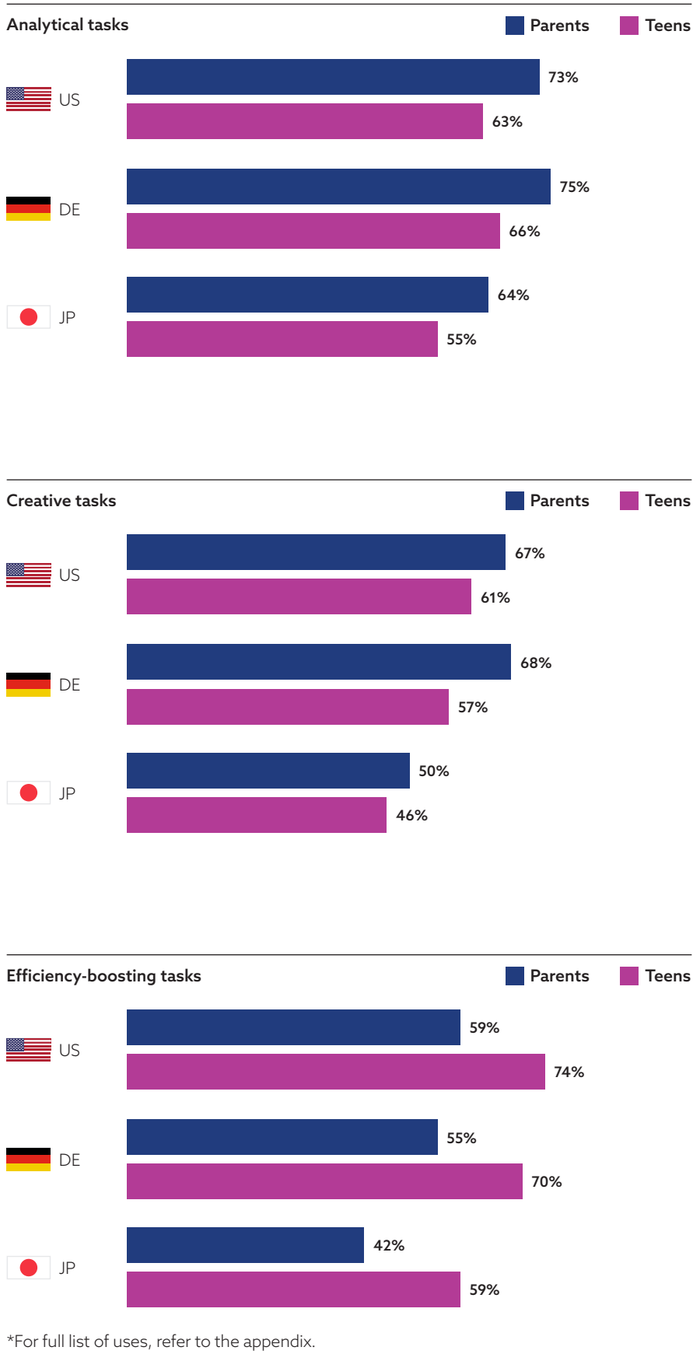
While awareness and usage levels are similar, there are key differences between how teens and their parents are using genAI.

Currently, parents across all three markets report that their top uses are for analytical tasks, including using it as a search engine or as a language translator. Nearly three-fourths of US and German parents and two-thirds of Japanese parents use it for these analytical tasks. However, many (two-thirds of US and German parents, and half of Japanese parents) are also turning to genAI for creative tasks such as helping produce or edit speeches and poems, or creating images and music.

Teens, on the other hand, rely on generative AI to be more efficient at tasks including proofreading and creating synopses of longer works. Currently, they use it less for analytical tasks or for producing creative content. Qualitative findings show that teens are not only aware of the ways they can use tools to help forgo school work or finish it more quickly, but what's more – teens anecdotally reflect on the ways they are working alongside genAI, like inputting their writing into genAI and having it provide suggestions to improve their writing style and ultimately the quality of their work.

When it comes to academics, teaching teens how to use genAI for positive personal growth – like adapting a lesson or asking for a concept explanation that fits their individual learning style – will help teachers and students alike use genAI to complement teens' schoolwork. Addressing concerns about overreliance on genAI will also be key to conveying the benefits of its use for education.

Top uses of generative AI today* (among those who have used or tried genAI)



*For full list of uses, refer to the appendix.

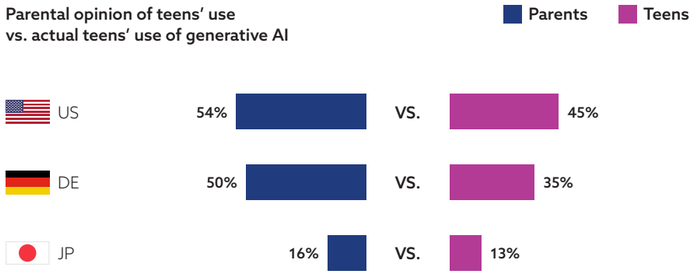
Parents lack clarity on how and how much their teens are using generative AI.

Findings reveal a divide between parents and teens when it comes to assessing teen usage of genAI. This is especially pronounced in Germany, where parents believe their teens are using genAI more than teens report that they are. Japanese parents have a more accurate sense of how much their teens are using genAI, likely because usage is lower than in the US and Germany.

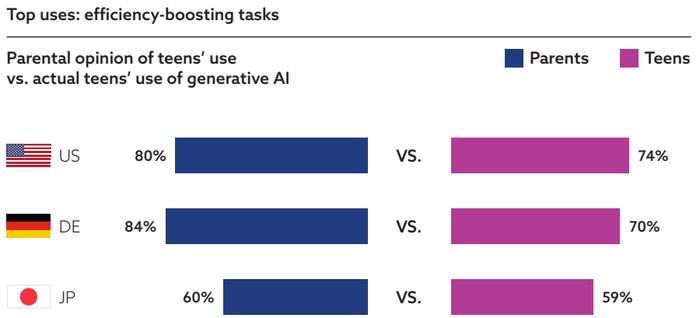
There is also a perception gap regarding the ways teens are using genAI. When looking at the top uses among teens today – for efficiency-boosting tasks like checking grammar or creating workout schedules – German parents overestimate their teens' use. Nearly 9 in 10 parents in Germany believe their teens are using it to boost efficiency, while only 7 in 10 German teens report using it that way. Both German and US parents overestimate the degree to which their teens are using genAI for analytical tasks like translating foreign languages. Roughly 7 in 10 US and 8 in 10 German parents say their teens are using it analytically, while only two-thirds of teens in the US and Germany report that to be the case.

While US parents tend to overestimate their teen's generative AI use for analytical tasks, they do have an accurate sense of how much their teens are using genAI for creative tasks, like generating images. German parents on the other hand overestimate the way their teens use genAI across all types of tasks.

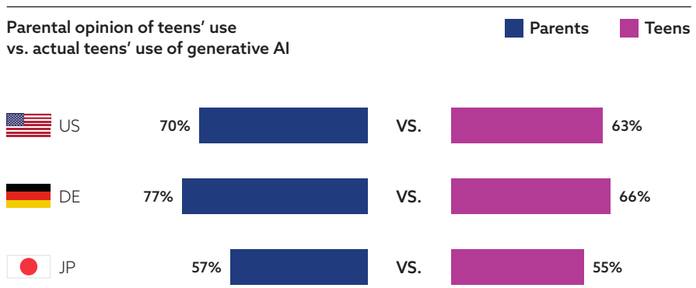
Overall across all uses



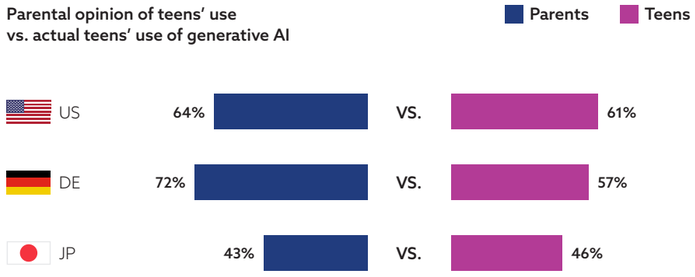
Top uses: efficiency-boosting tasks



Top uses: analytical tasks



Top uses: creative tasks



> *My daughter finished an article for school in such short time and it was very cool - and so I dug a little deeper and she told me about ChatGPT. I don't know if they use it a lot for school, but I don't care much, it's okay with me.*
>
> ***Parent, Germany***

SECTION 3

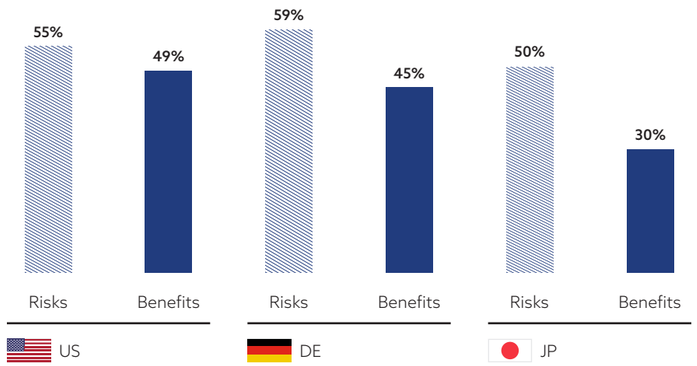
Understanding genAI fears and anxieties

Findings reveal that parents share considerable concerns about the potential risks of generative AI, and want to better understand how to mitigate them.

This is true across all countries, as is the desire to be armed with more knowledge of risks (versus benefits) for the purpose of discussing genAI with their teens.

At this time, parents feel they need to know more about the potential risks than the potential benefits of genAI. The interest and emphasis on negative aspects of genAI may be the result of consistent media coverage that has focused on many types of threats and possible dangers it represents, as well as the general unease and uncertainty that comes with the mainstreaming of any new or transformational technology.

Topics parents want to learn more about to guide conversations with teens: Desire to know more about the potential risks of genAI vs. more about the potential benefits of genAI



Confronting challenges on employment, misinformation, and harassment.

Overwhelmingly, the top concern about generative AI is potential job loss, among both parents and teens in this study. The lone exception of this is teens in Japan, who are most concerned about misinformation. Fear about the implications of genAI on jobs ranks higher than a wide range of other more granular concerns including plagiarism, social manipulation, identity theft, and even negative impacts on learning.

Already facing upheaval in traditional career paths and employment, the impact of genAI on the job market is clearly top-of-mind. Teens, especially in the US and Japan, are more concerned about job loss than their parents. This could be because they are yet to embark on that life stage, and from the sidelines are assessing the impacts of how genAI may alter their future choices. For parents, this is an opportunity to discuss their teens' fears and help navigate the next steps of their education and career.

Other societal risks are also giving parents and teens cause for apprehension. The spread of false or biased information is a standout concern across all three countries, though it is most pronounced among Japanese youth. Cyberbullying is another leading worry. Coupled with the misgivings about misinformation, teens are especially fearful about new and more advanced forms of harassment and fake imagery that could affect them personally in the rapidly evolving new era of genAI.

Cyberbullying continues to cause concern for teens, who worry that genAI may give bad actors new and more sophisticated ways to enable forms of harassment.

Loss of critical thinking skills is another area of concern, particularly among parents in the US and Germany.

Parents in the US and Germany express trepidation that their teens will lose opportunities to engage in deep analysis and develop their own original ideas. Expanding on this concern, parents want their children to sharpen their cognitive abilities, expressing a desire for them to learn foundational skills 'the old fashioned way' before relying on advanced technological tools. They want their children to be able to independently navigate and quickly adapt in a more complex world.

Top concerns or risks of generative AI (select top two) — **Parents** / **Teens**

US

	Parents			Teens	
34%	Job loss	#1	42%	Job loss
26%	Loss of critical thinking skills	#2	30%	Spread of false information
25%	AI surpassing humans	#3	28%	New forms of cyberbullying
23%	Spread of false information	#4	28%	AI surpassing humans
21%	Bad actors committing fraud	#5	26%	Social manipulation

DE

	Parents			Teens	
36%	Job loss	#1	39%	Job loss
20%	Loss of critical thinking skills	#2	33%	AI surpassing humans
25%	Spread of biased information	#3	32%	New forms of cyberbullying
24%	Spread of false information	#4	31%	Spread of false information
24%	AI surpassing humans	#5	27%	Social manipulation

JP

	Parents			Teens	
38%	Job loss	#1	47%	Spread of false information
36%	Spread of false information	#2	38%	Reduced motivation
33%	Hindrance in gaining experiences	#3	38%	AI surpassing humans
30%	Growing dependency on genAI	#4	37%	Job loss
29%	Plagiarism	#5	36%	Growing dependency on genAI

I trust it to write a letter, a recipe, a resume. I trust it for that. Do I trust it to give me the causes of the Vietnam War? I don't know.

Parent, US

Deception is a concern. I worry about being led into something harmful while enjoying chatting with strangers, etc.

Parent, Japan

[I worry about it] replacing humans; expanding areas of work that AI can do, and jobs that will disappear in the future.

Parent, Japan

Maybe our own intelligence will suffer – we will get lazy and won't use our brains anymore.

Teen, Germany

[I am concerned about the] loss of critical thinking. It's like the calculator. Can you do it without it? Once you prove that, then you can use the calculator. [GenAI is] kind of the same thing for me.

Parent, US

What does trust mean to users?

Parents and teens are currently still hesitant to trust the accuracy of genAI outputs. Both groups have concerns around misinformation and privacy, but do not necessarily let their concerns discourage them from using genAI. This could be, as some express, an accepted belief that no technology is perfect – and that users must be able to scrutinize information for accuracy and think independently.

I trust it to some extent. Because if I don't trust it, I don't think I can use it.

Teen, Japan

I don't trust 100% of it. But that is only because of my theory that perfection does not exist, not only for generative AI, but for all technology.

Parent, Japan

I do not trust anything, to be honest. I also use WhatsApp with a negative feeling. But during the pandemic, we just needed it, or my kid would have been behind.

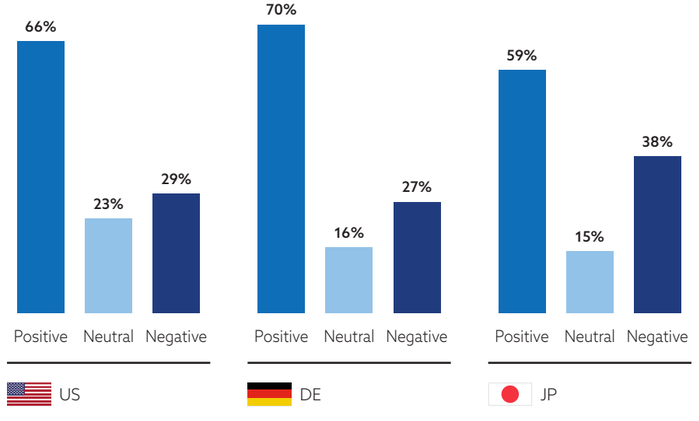
Parent, Germany

Optimism prevails.

Despite their concerns about genAI, people remain optimistic. A majority of parents feel positive about their teens using genAI, a sentiment that is most widespread in Germany and the US, followed by Japan.

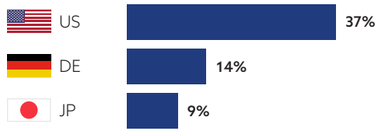
At this early stage, over one-third of US parents feel interested or comfortable with their teen using genAI. In Germany, the picture is slightly different: German parents are the most interested in their teens using genAI but much less comfortable. Qualitatively, German parents expressed caution and skepticism with any "serious" new technology like genAI, citing concerns about compulsive tech use or "addiction." They are, by contrast, far more comfortable adopting "harmless" assistive technologies like robot vacuum cleaners.

Parents' sentiment of teens using genAI today

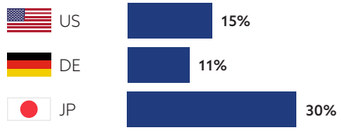


Parents are 'interested' in their teens using genAI today:

Parents feel 'comfortable' with their teens using genAI today:



Parents feel 'anxious or worried' about their 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

SECTION 4

Embracing the power and potential of genAI

Collectively, parents and teens across all countries are most excited about the personal (versus societal) benefits that genAI promises.

They share optimism that genAI will, above all else, help them learn new things like foreign language, art or history (**48%** of all parents and **66%** of all teens).

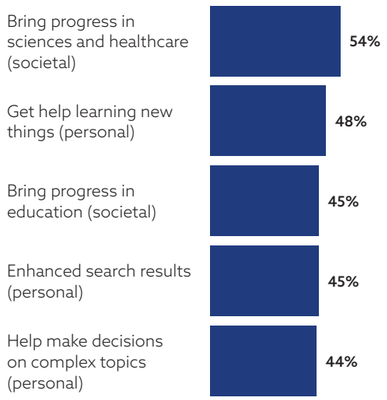
Parents across all countries are excited for genAI to help with streamlining their lives, with possibilities like enhanced search results (**45%**), and support making decisions on complex topics like insurance or financial planning (**44%**). For teens, it's more about freeing up time by reducing boring tasks at home (**57%**), like helping them plan out and organize chores, and summarizing or compiling information for easier, faster comprehension (**59%**).

The focus on personal benefits does not mean people fail to see the bigger picture. Parents and teens are enthusiastic about potential societal benefits of genAI, believing that it will, among other things, advance science and healthcare (**54%** of all parents) and advance education (**45%** of all parents and **55%** of all teens).

Standing out for their optimism are Japanese respondents who, despite having lower general awareness and uptake of genAI, are the most excited about the personal and societal benefits. Qualitative responses indicate that while genAI is still in its infancy in Japan, parents and teens are curious and excited to find out what an AI-augmented society looks like. Parents wish for their children to find new and ingenious uses for the technology, and teens imagine it will spark an important leap forward for humanity as a whole.

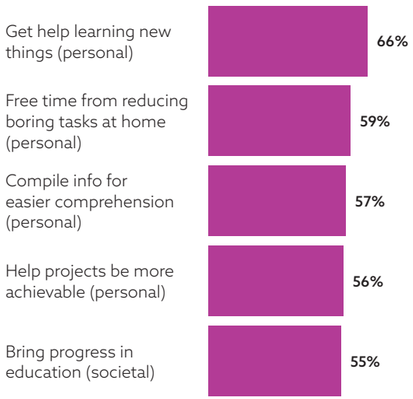
Total Parents

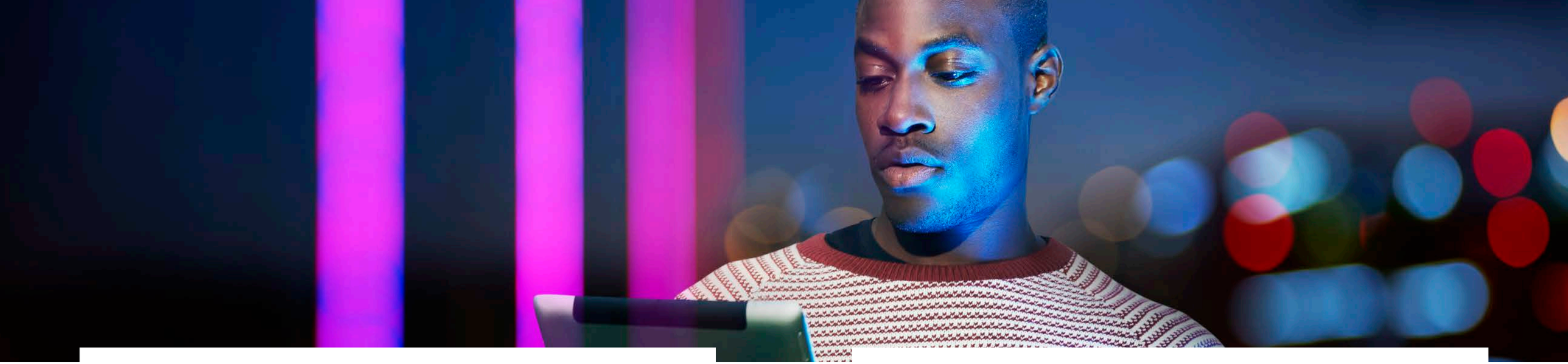
Top 5 most exciting personal benefits of genAI in the future among all parents
(Select top 2 – across personal and societal benefits)



Total Teens

Top 5 most exciting personal benefits of genAI in the future among all teens
(Select top 2 – across personal and societal benefits)



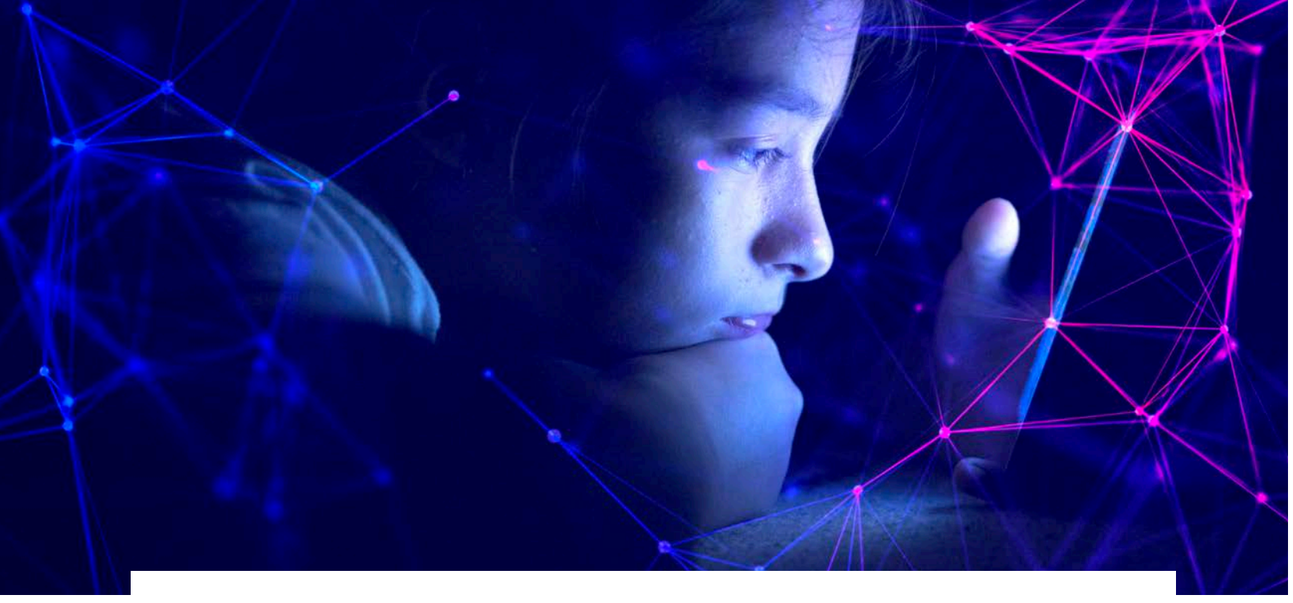


Envisioning future use is hard to do.

The world is still in the throes of early adoption and understanding of generative AI. Not knowing what the future holds, people expect that their future uses of genAI will look very similar to today.

Parents and teens both say their future selves will be interested to use genAI similarly to how they use it today. For parents (especially German parents) this means they anticipate using it for analytical tasks like search, data analysis, translations, etc. as much in the future as they do today.

Teens are most interested in using genAI for boosting efficiency in the future—very much aligned to activities they undertake at school today, like essay writing, grammar checks, text summaries and math calculations. While they undoubtedly see the increasing influence of content created by genAI online, it may be difficult at this early stage to envision themselves as the users and creators, something that may change rapidly as using these tools becomes more commonplace.

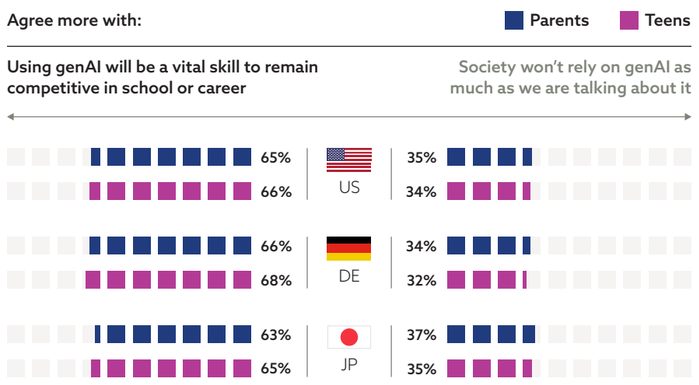


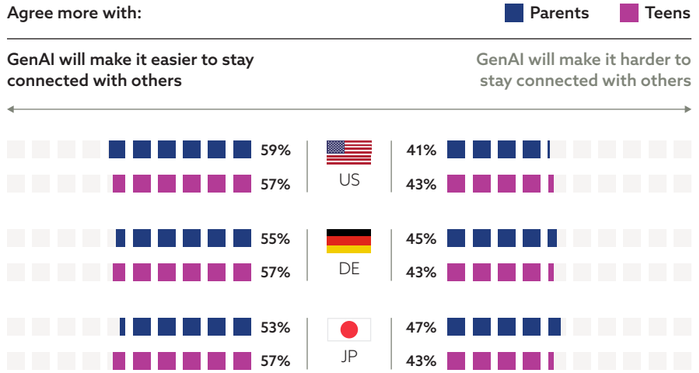
A transformational technology, here to stay.

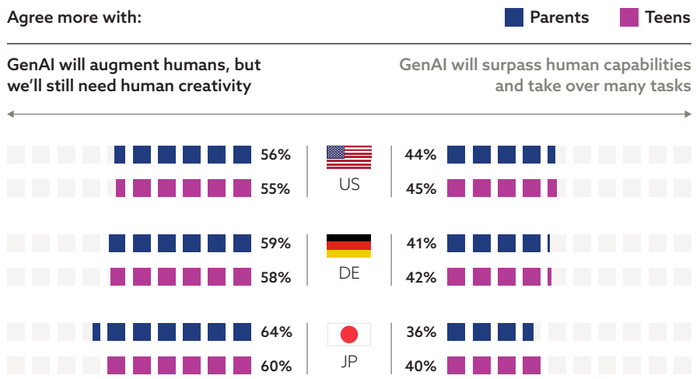
As parents and teens become better acquainted with generative AI, their experiences are helping them break through its initial hype. Most express an understanding and acceptance that genAI is an irrepressible force, one that will be ubiquitous in the future. While they are contending with the broad scope of unknowns around it, they are hopeful that its benefits will outweigh its risks, both personally and societally.

As it becomes more entrenched in people's lives, a majority of families believe they will need to work with – not against – genAI. That is, they see the potential to use genAI to their benefit, helping them remain competitive, stay connected with others and augment their capabilities. To avoid or disengage with genAI will mean rejecting certain advantages, which people understand may result in themselves or their children falling behind.

Companies can build trust for genAI tools by educating people about the benefits they offer, as well as being transparent about data sources and handling. Committing early to responsible and ethical practices around genAI may also help to alleviate concerns about a future in which artificial intelligence becomes too embedded in systems that allow it to surpass human control.







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

I hope it will be able to take over tasks that are too large, too dangerous, or too demanding for humans to complete. Any technology is a double-edged sword, depending on how it is used, and AI is no different. I hope that AI will help society develop by combining the accuracy and objectivity of machines with creativity.

Parent, Japan

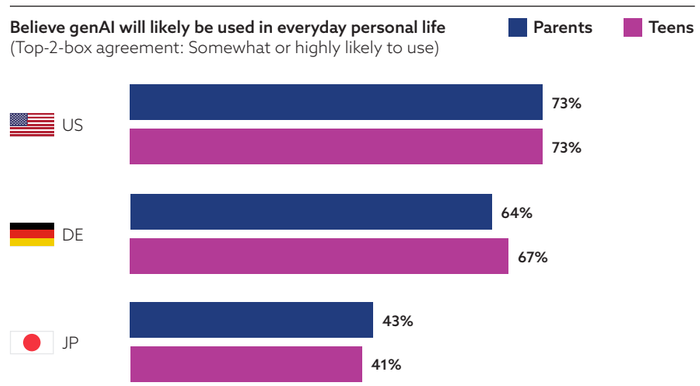
SECTION 5

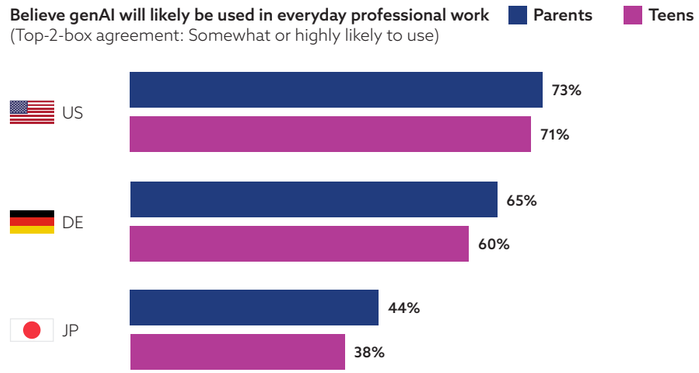
Looking to the future: opportunities for genAI

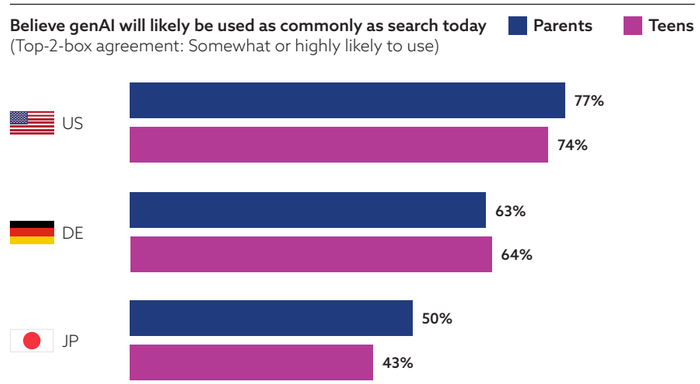
Parents and teens, especially in the US and Germany, expect genAI to be a part of everyday life in the future.

This applies to both their personal and professional lives. Even in Japan, where current uptake is much lower, roughly 4 in 10 still anticipate a future world where genAI is more embedded.

Despite strong concerns for job loss in the future, parents and teens also understand genAI's eventual presence in their work life is inevitable. Companies will need to balance promoting the benefits of genAI to users without downplaying people's real concerns about its impact on work and career.



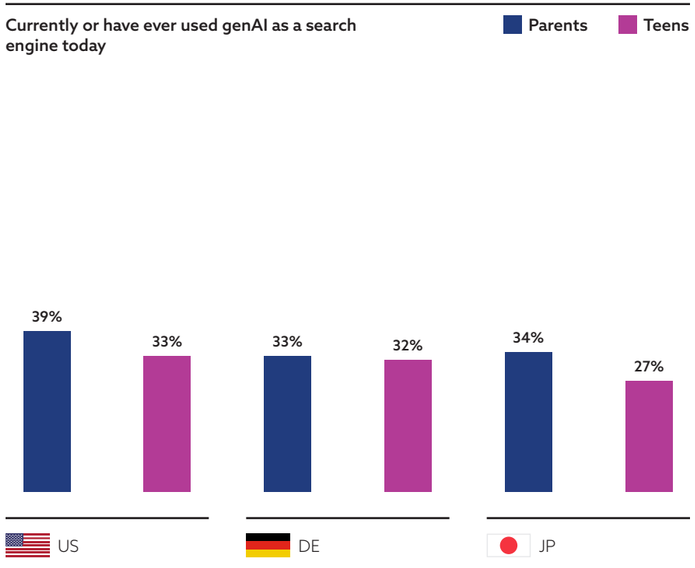




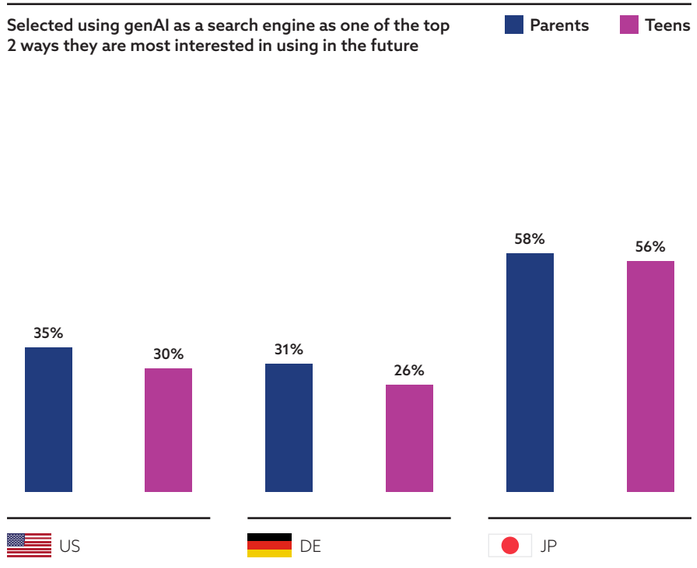
People anticipate genAI will enhance and refine the way they interact with today's digital tools.

For example, qualitative respondents report expecting genAI to be an add-on tool to supplement, rather than replace, search engines. What's more – over one-third of parents already report using genAI as a search engine today.

Currently or have ever used genAI as a search engine today



Selected using genAI as a search engine as one of the top 2 ways they are most interested in using in the future

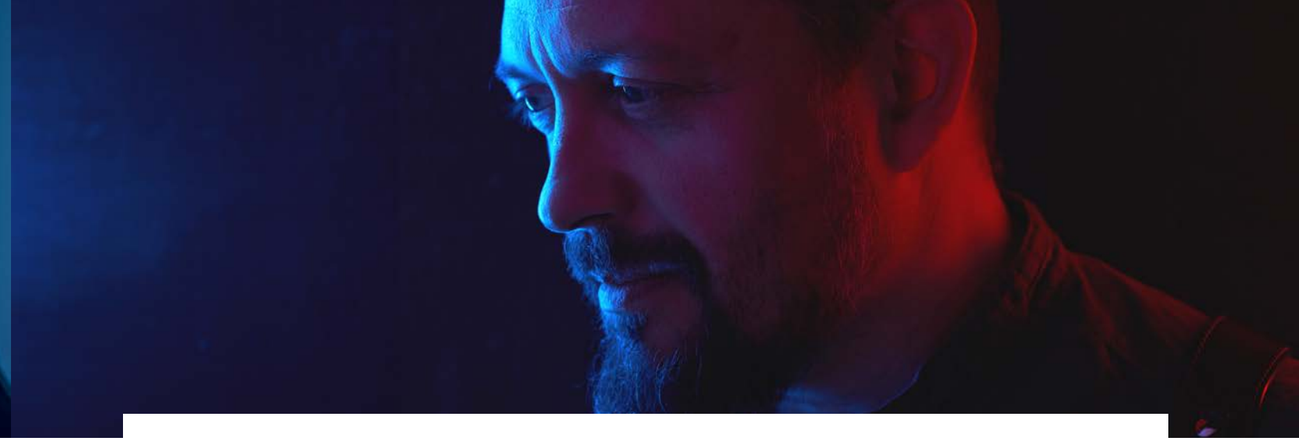


I actually prefer Google, having different sources I can check – but sometimes ChatGPT could help with getting started with text.

Teen, Germany

It's a better version of Google. You get a very detailed answer to your questions directly – and not a list of links.

Teen, Germany



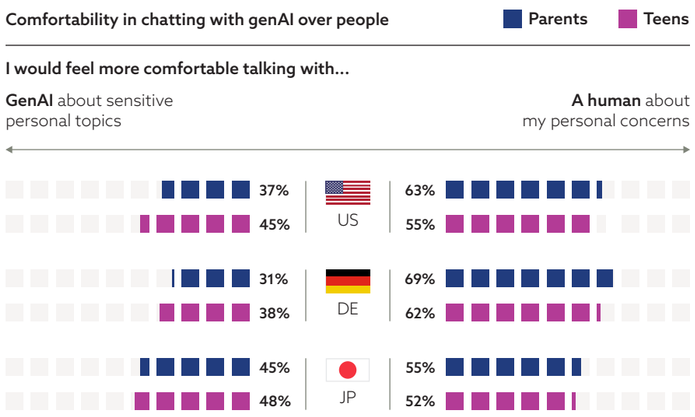
Supporting mental and emotional health.

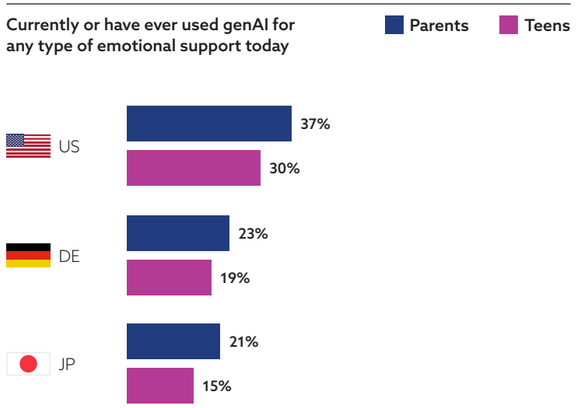
People also reported interest and openness to using generative AI in more novel ways, for example as a tool for mental health and emotional support.

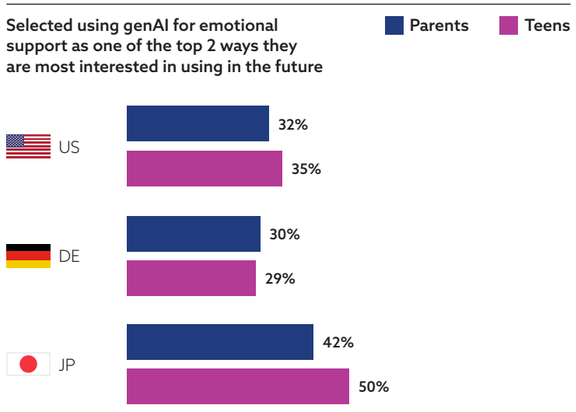
While most parents and teens would prefer to speak with another person about their personal or relationship concerns, it is notable that **38%** of all parents and **43%** of all teens are interested in using assistance from genAI to explore sensitive topics.

This willingness seems to be linked to the idea that genAI offers an impartial or more anonymous source of reference. Japanese respondents in particular stand out on this front: **45%** of Japanese parents and **48%** of teens say they feel more comfortable talking with generative AI about sensitive personal topics instead of a human.

This raises key questions to consider: Will acceptance and interest in AI-driven emotional support grow? How can parents ensure their teens are receiving sound, helpful advice? How might this be a positive application of genAI, or a future challenge?







Some people just want to talk to somebody. No matter what the conversation is about. Just because [genAI is] not a real person, it doesn't mean it can't make a person feel – because words are powerful. So, at the end of the day, it can always help in emotional and mental ways.

Teen, US

Least interested in using it in Germany:

A machine that can imitate or replace a human: it sounds very frightening. I used to meet my friends [in person] when I was a kid, now my children play in virtual rooms and don't care about any personal, emotional aspect.

Parent, Germany

I feel like [genAI] doesn't understand everything. I think it understands emotions, but it is still a robot at the end of the day. And it won't really process emotions fully when you're talking to it.

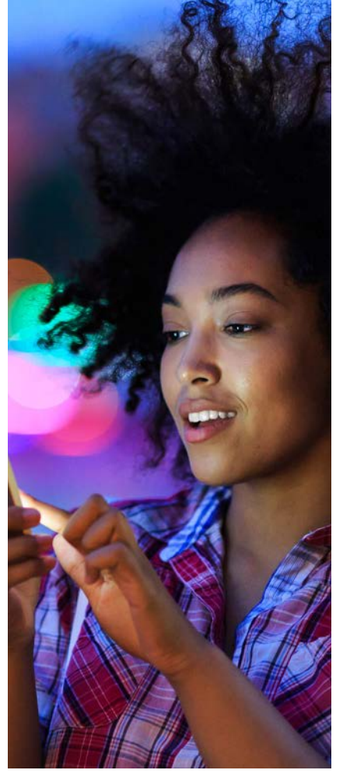
Teen, US

SECTION 6

Parenting in the age of algorithms

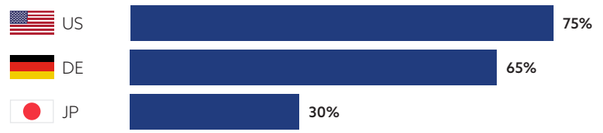
Parents in the US believe they bear the primary responsibility to safeguard their teens as they explore genAI, followed by German and then Japanese parents.

This sense of responsibility is markedly lower among Japanese parents, where only 3 in 10 parents feel they are responsible - in contrast with **65%** of German parents and **75%** of US parents.



Japanese parents anecdotally share that they want their teens to grow more independent and learn from their mistakes.

Parents feel they are responsible for safeguarding genAI experiences for their teens (Top-2-Box: A lot or quite a bit of responsibility)



We as parents need to do it together with our kids, we have to know what's going on, and how to integrate things like this. To me it's another new medium we all have to get familiar with.

Parent, Germany

We don't want to monitor them; we want to raise them to be able to protect themselves. For this purpose, I give advice, but I also want them to make their own choices because failure is necessary.

Parent, Japan

The perceived onus of responsibility for safe genAI experiences differs across markets.

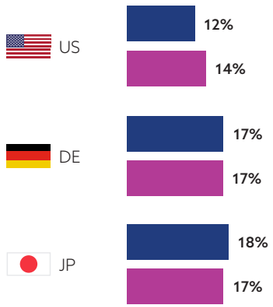
While US parents overwhelmingly believe that they bear the primary responsibility for safeguarding their teens' genAI experiences, this perception is more nuanced in other markets, where governments are also expected to ensure genAI safety. Notably, teens in Germany and Japan think the government should bear the most responsibility – more so even than parents. Other players tasked with responsibility, albeit much less, include companies and platforms, schools, and international bodies.

"

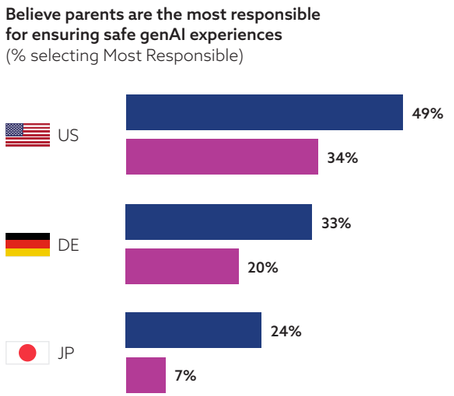
I believe that the government will regulate [genAI] by law. However, it is only the service provider that can take 'responsibility.' It is the role of the user to understand and use the service, keeping in mind that the service may not take responsibility.

Parent, Japan

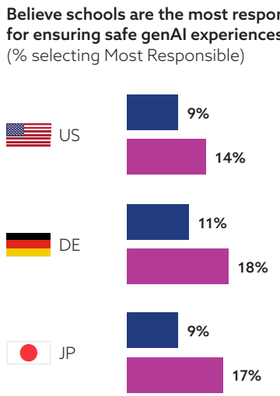
Believe companies/platforms are the most responsible for ensuring safe genAI experiences
(% selecting Most Responsible)



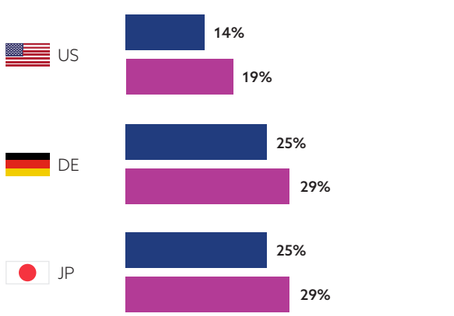
Believe parents are the most responsible for ensuring safe genAI experiences
(% selecting Most Responsible)



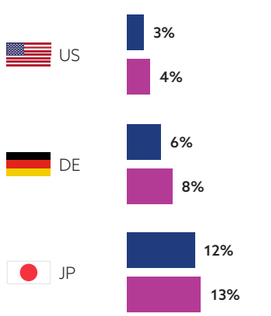
Believe schools are the most responsible for ensuring safe genAI experiences
(% selecting Most Responsible)



Believe governments are the most responsible for ensuring safe genAI experiences
(% selecting Most Responsible)



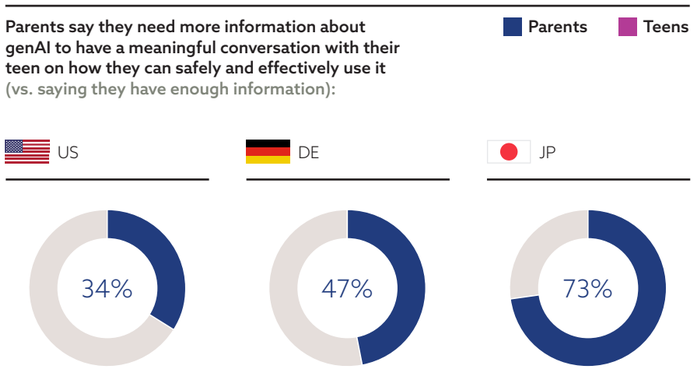
Believe international bodies are the most responsible for ensuring safe genAI experiences
(% selecting Most Responsible)



Parents desire more information on genAI.

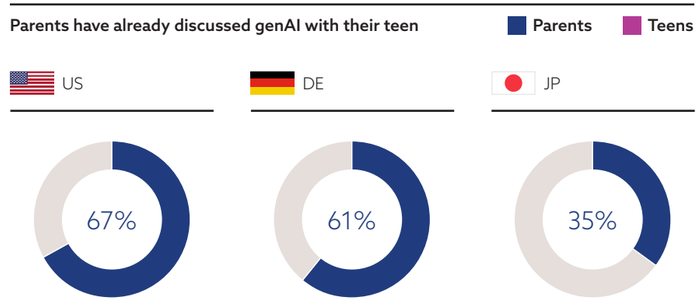
Parents need more information to help them navigate conversations about genAI and ensure safe experiences. Today, a majority of Japanese parents (**73%**) and nearly half of German parents (**47%**) say that they don't have enough information or education to help them guide more meaningful conversations about genAI with their teens.

Parents say they need more information about genAI to have a meaningful conversation with their teen on how they can safely and effectively use it (vs. saying they have enough information):



There is a clear connection between how equipped parents feel with the right information and how many households have already discussed genAI today.

Japanese parents are talking less with their teens about genAI than their American and German counterparts. One reason could be education: Japanese parents were the most likely to admit that they need more information in order to have these conversations, which could be an expected result of lower awareness and uptake. Another reason could be different views on responsibility: as noted earlier in this report, Japanese parents feel less responsible for ensuring safe genAI experiences for their teens themselves – they feel governments should also be helping create safe experiences.



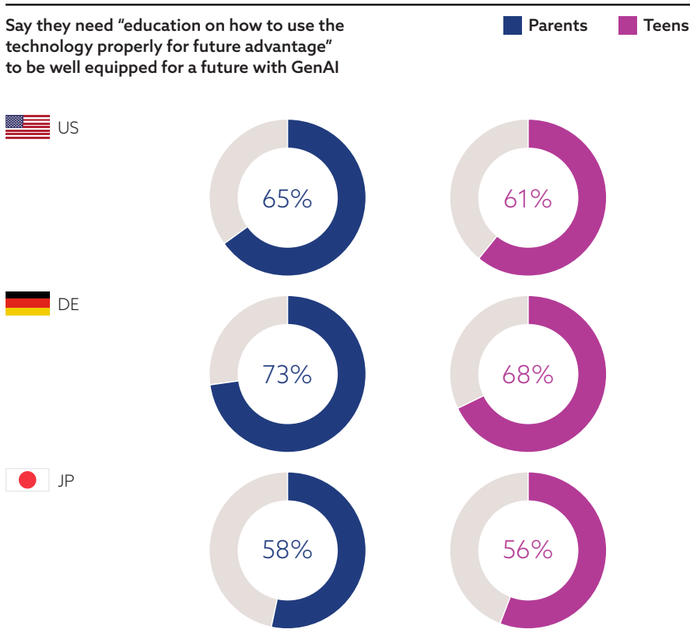
I heard about [genAI] from my daughter incidentally: that she used this program to help with her homework. I felt helpless at first, and I didn't like that it's not her own work completely. I want her to be more critical with such things, and be more sensitive with her data. I am not sure how to talk to her about all this.

Parent, Germany

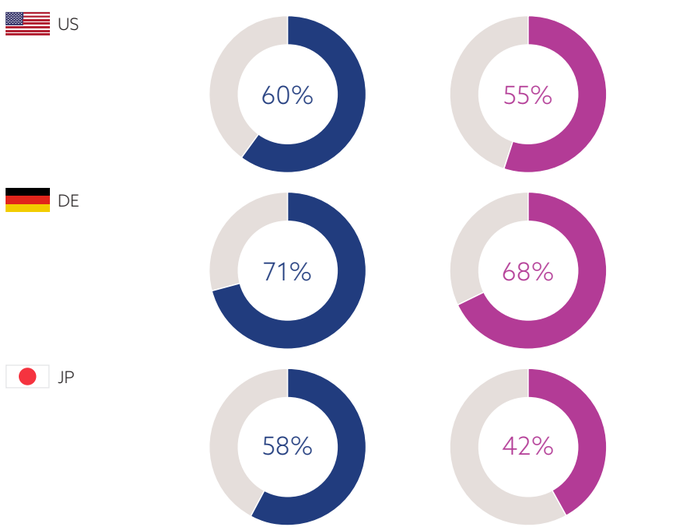
To better prepare for a world in which genAI is more embedded in daily life, a majority of parents and teens in all three countries want to know more about how to effectively use it to their future advantage.

Respondents also noted that they need education on the potential downsides of genAI, with German parents and teens more strongly expressing that opinion.

Say they need "education on how to use the technology properly for future advantage" to be well equipped for a future with GenAI



Say they need "education on potential downsides/negatives" to be well equipped for a future with GenAI



Education on genAI is expected from schools and companies.

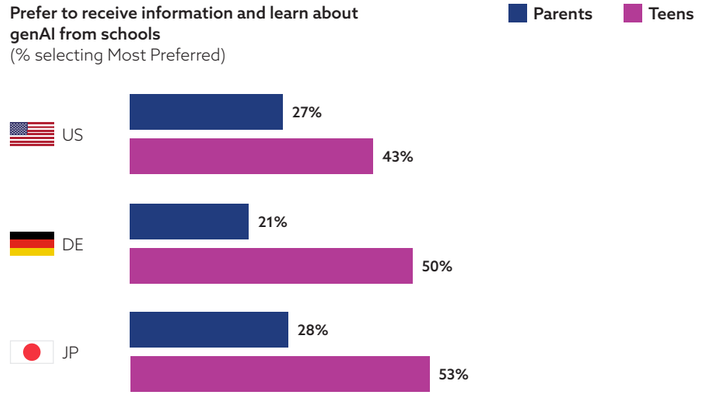
"

I actually like trying new things, but [with genAI] I am insecure where the journey will lead us. That's why I am attending 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!

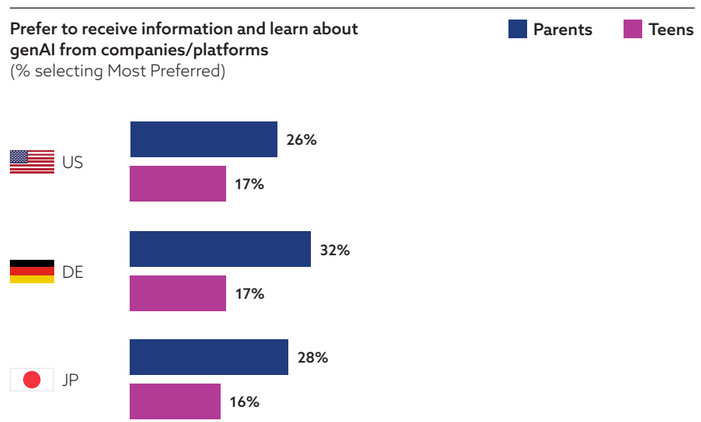
Parent, Germany

While people believe that parents and governments are broadly responsible for providing and enforcing safeguards around genAI experiences, they look to different sources – namely schools and companies – to teach them about genAI. Teens in particular report that they prefer to learn about genAI from schools, rather than companies. This may stem from the fact that they have often been exposed to conversations about these tools at school, or initially used them for school work, making it a natural setting to learn more about it in the future.

Prefer to receive information and learn about genAI from schools
(% selecting Most Preferred)



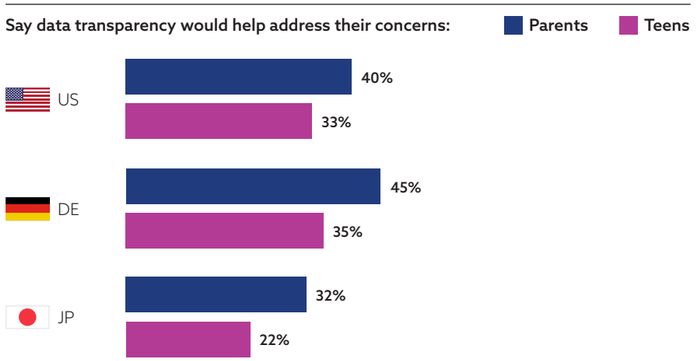
Prefer to receive information and learn about genAI from companies/platforms
(% selecting Most Preferred)

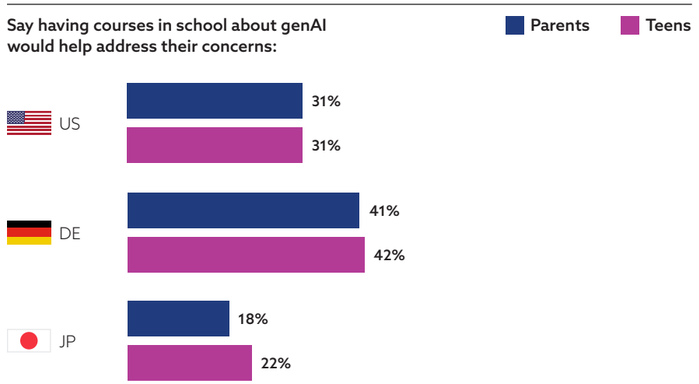


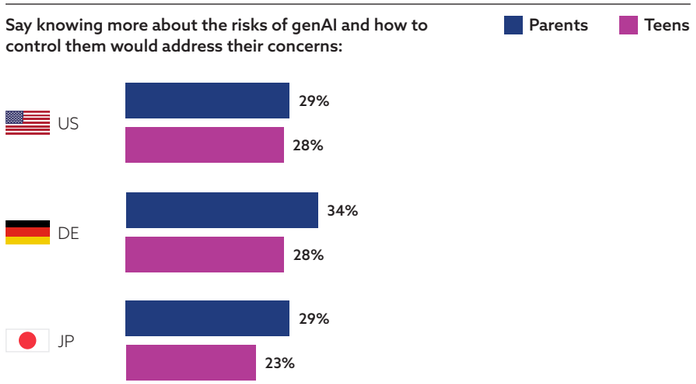
Improved knowledge and transparency are also critical topics.

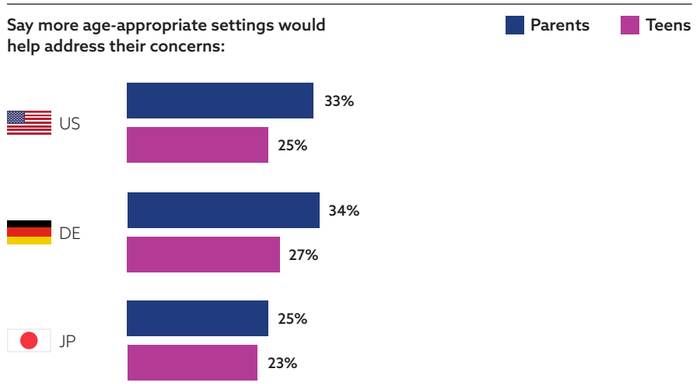
Most parents and teens rank transparency of data practices as the number one factor that would address many of their genAI concerns.

Other factors vary somewhat by country. Japanese parents want to know more about the risks of genAI and how to mitigate them, while Japanese teens say school classes would help alleviate their worries. German parents and teens would also like to see courses in school. Americans would prefer more settings to ensure that content is age-appropriate.





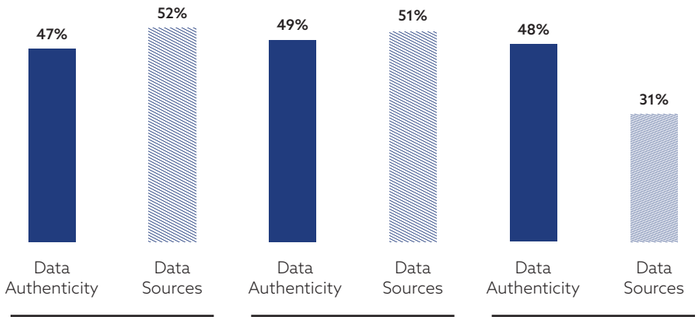




Parents in all three countries want more information, particularly around risk reduction, to arm them for discussions about genAI with their teens.

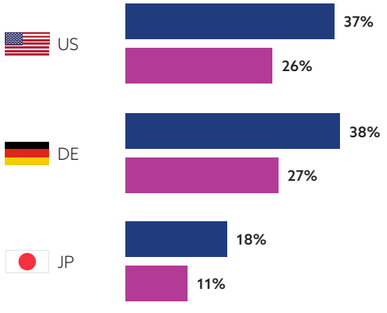
Across all three countries, parents seek to better grasp the legitimacy of the data that trains and informs genAI. There is a sense that understanding the authenticity of this data would help guide educational conversations with teens, although in the US and Germany parents feel they themselves would also benefit from understanding how the data is used and from where it is sourced.

Topics parents want to learn more about to guide conversations with teens:
(Desire to Know More About Authenticity of the Data and Sources of Data Used by GenAI)



Revealing what's behind generative AI and how it works – with more knowledge on data sources and how data is aggregated and used to generate new content – correlates with higher use and more self-assured exploration of the technology. Increased transparency and education on the data sources could thus serve to motivate parents and teens to use genAI more, and with higher confidence.

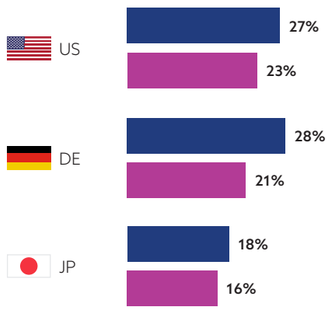
Top reason that would help motivate them or instill greater confidence to use genAI: More knowledge on data sources and how it works



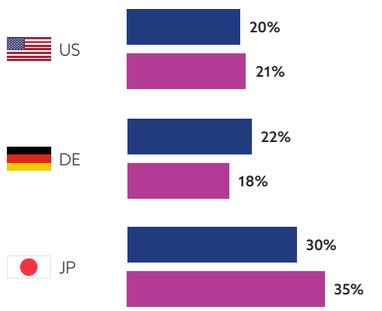
On where they want to learn more about genAI, parents want classes.

Preferring virtual classes in the US and Germany, and in-person in Japan. Teens generally prefer social media content as found on TikTok, YouTube or Instagram, though in Japan, teens still have a top preference for in-person classes. This finding highlights a dual preference. While teens express interest and trust in genAI education coming from schools, they also gravitate toward wanting guidance in faster, more digestible formats within an arena where they spend much of their time - social platforms. This is both a potential gap and an opportunity: to consider how credible educational offerings will best reach and resonate with younger audiences.

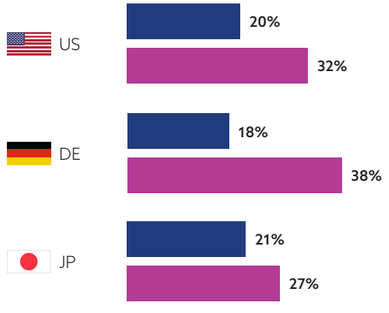
Prefer to receive information and learn about genAI via online/virtual classes
(% selecting Most Preferred)



Prefer to receive information and learn about genAI via in-person classes
(% selecting Most Preferred)



Prefer to receive information and learn about genAI via social media
(% selecting Most Preferred)



SECTION 7

What can parents and industry do?

For Parents: Guidance for Navigating GenAI Use

This is a rare (and likely fleeting) moment for the current generation of parents to lead their tech-savvy teens. As genAI continues to become a more intrinsic part of the platforms and tools used on a daily basis, teens' familiarity and confidence with them will grow. They will likely pull ahead of their parents in terms of knowledge, confidence, and frequency of use as they have with other elements of digital life, making this a unique inflection point.

- Parents should strive to stay attuned to information and resources on genAI as they become available, both for themselves and their teens. This should span a variety of sources including articles, classes, social media, and guidance from companies and platforms.

- Open and organic dialogue is key for parents to understand teens' use of all types of technology, including generative AI. To stay aware of how their teens are using genAI today, and to plan for how they can ensure future experiences are safe, parents must take an active and ongoing interest in their digital habits and influences.

- Parents will need to educate their teens about both the risks and benefits that may come with using generative AI, and positively role modeling the process of learning about new technology will be a key element of this. Parents should feel motivated to try genAI tools for themselves, for their own purposes as well as creating a better understanding of how their teen could benefit. At this early stage in the wider adoption of genAI tools, parents should embrace the challenge and learning curve alongside their teens and the rest of the public.

- Parents can benefit from viewing genAI as a highly differentiating tool to level up their skills, both personally and professionally. Parents should teach teens to wield its power wisely - encouraging use in a way that enhances and betters their lives, without replacing or overtaking necessary fundamental skills or creativity.

For Industry: Suggestions for Developing Best Practices

Evidenced by the attitudes captured throughout this report, people are aware that genAI is creating a moment of profound cultural change. As the purveyors of these new experiences, companies should prioritize creating ethical, transparent, and user-friendly approaches when introducing these tools.

- Companies should work to make genAI solutions accessible and user-friendly for global markets. Tools should be localized, expanding capabilities to ensure they are widely available in multiple languages. New tools should also be designed with kids in mind, to create equally beneficial and safe experiences for parents and teens alike.
- Companies should strive to proactively create messaging and education around generative AI that is transparent from the outset. Companies are well positioned to help alleviate certain concerns and reduce skepticism, while at the same time conveying new and interesting opportunities.
- Industry collaboration will be critical to securing safer genAI experiences in the future. Companies working together to establish best practices will encourage greater industry-wide clarity on how genAI operates, and how data is sourced and authenticated.
- Including the perspectives of a diverse set of stakeholders including researchers and academics, non-profit organizations, app developers, marginalized consumer groups, government partners, and others will be critical to creating a responsible approach to the future of genAI.
- As part of their shared responsibility to the public, companies should work with policymakers particularly in prioritizing research that will create an evidence base for legislative decisions around genAI. Potential uses and perceptions of these tools will dramatically change as acceptance grows, and understanding these rapid shifts will be key to guiding the future of safer genAI experiences.

APPENDIX

Introduction:

This study was conducted by Kantar on behalf of the Family Online Safety Institute (FOSI) and was sponsored by Google. The study examines parents and teenagers among three target countries: the United States, Germany and Japan.

Sample definition & specs:

The Qualitative study surveyed parents of teens aged 13-17. N=28 parents and N=32 teens participated in the Qualitative discussions. In the US, 7 parents and 9 were qualitatively surveyed. In Germany, 11 parents and 11 teens participated. In Japan, 10 parents and 12 teens were qualitatively surveyed.

In the Quantitative study, parents and their teens were surveyed across the same three countries: US, Germany and Japan. N=3,001 total responses were captured (as combined parent and teen responses), or ~n=1000 combined responses per country.

To qualify for the main quantitative survey, a respondent must be a parent of a teen aged 13-17. The parent also holds the primary or shared decision-making role when it comes to their child's technology usage. Parents must have heard of or are aware of both Artificial Intelligence (AI) and generative AI. Qualifying respondents also include teenagers living in the parent's household part-time or full-time.

Other qualifying criteria include:

- Have high speed Internet at home
- Parents allow technology use and screen time
- Mix of household types (single child/multi-child, dual-working parent/ single-working parent, single parent/multi-parent)
- Mix of socio-economic levels

Data Collection & Fielding:

Kantar fielded four qualitative focus groups, two with parents and two with teens, in the US from July 6th to July 7th. 2023. Four focus groups were also conducted in Germany, two groups with parents and two with teens. Germany focus groups were held from July 11th to July 12th, 2023.

Kantar fielded a 3-day online qualitative journal in Japan from July 11th to July 13th, 2023. Responses were partially masked, ensuring participants could not view other responses until responding themselves.

The online quantitative survey was soft launched August 17th, 2023, in the US and August 25th, 2023 in Germany and Japan. The survey was fully launched 1-2 business days later in each country.

Weighting:

Sampling was monitored during fielding to help ensure the final General Population sample resembled the target population and to minimize the required post-stratification weighting. Gender was used to weight in all countries. The gender weights by each country are as follows:

Country	Gender Value	Weighted Prportion
US	Male	45%
	Female	54%
	Non-binary/Self-identify	1%
Germany	Male	46%
	Female	53%
	Non-binary/Self-identify	1%
Japan	Male	45%
	Female	54%
	Non-binary/Self-identify	1%

This survey was only available to individuals with internet access and therefore the results may not be generalizable to those households without internet access.

Detailed Question Information:

Full List of Generative AI Uses and Detailed Tasks

CREATIVE TASKS

1. Generating / editing digital content (e.g., images, videos, games, music)
2. Just chatting or asking general questions
3. Jump starting ideas (e.g., breaking 'writer's block')
4. Generating / editing written content (e.g., speeches, poems, papers, essays)

ANALYTICAL TASKS

5. Using as a search engine
6. Brainstorming ideas and content for work
7. Translations
8. Background research for a project
9. Getting professional advice (e.g., medical, legal)
10. Data analysis

STRUCTURED TASKS

1. Advice on shopping
2. Comparing products and price
3. Creating draft text (e.g., emails, texts, resume, newsletters, etc.)
4. Generating / editing computer or programming code

EFFICIENCY TASKS

1. Summarizing long texts/books
2. Checking grammar/proofreading
3. Brainstorming travel itineraries or leisure activities
4. Creating meal plans
5. Creating workout routines

EMOTIONAL TASKS

1. Advice on personal or relationship questions
2. Ideas on what to say on a dating app
3. Getting emotional support
4. Getting mental health advice

Detailed Question Information:

Full List of Concerns or Risks About Generative AI

CONCERNS:

1. Mishandling of personal information
2. Negative impact on authentic / actual learning
3. Hinderance in gaining experiences
4. Not being able to filter information that is biased/ inaccurate
5. General lack of information on Generative AI
6. Loss of critical thinking skills
7. Potential for manipulation
8. Potential for age inappropriate output
9. Growing dependency on Generative AI
10. Spread of fake / outdated / biased / inaccurate information
11. Plagiarism (stealing / copying other people's work)
12. Impersonation / identity theft
13. New forms of harassment / cyberbullying
14. Lack of accuracy in output generated
15. The pressure of keeping up with technology
16. General risks associated with disruptive technology
17. Negative mental health impact on child/ren
18. Impact on future income and/or career opportunities
19. Breakdown of community
20. Increased political division
21. Market / financial volatility or disruption
22. Social manipulation
23. Increased social class divide
24. Increased accidents /errors (e.g., AI thinking differently than humans)
25. AI surpassing / becoming smarter than humans

RISKS:

1. Lack of clarity surrounding copyright / content ownership
2. Job loss
3. Decreasing authenticity / originality in society
4. Bad actors using Generative AI to commit fraud / create biases
5. Causing people to be less motivated
6. Lack of validity in information people share
7. Spread of false information

Detailed Question Information:

Full List of Benefits of Generative AI

SOCIETIAL BENEFITS

1. Bring progress in sciences / healthcare
2. Bring progress in education
3. Making professional advice more affordable / available (e.g., legal, health, finances)
4. Identifying and reducing societal risks (e.g., detecting fraud, safer driving)
5. Improving functions of existing products
6. Improving abilities of workers
7. Helping with project planning / management

PERSONAL BENEFITS

1. Free time from reducing boring tasks at home (e.g., managing pantry, chores)
2. Helping make emotional / mental advice be more available
3. Helping personal projects be more achievable (e.g., image / music / video generation or edits, website generation, coding, learning)
4. Arranging shopping
5. Helping make decisions on complex topics (e.g., insurance, financial planning)
6. Improved / enhanced search results
7. Reduction of boring tasks at work
8. Getting help learning new things (e.g., language, history, art)
9. Getting help improving existing work
10. Getting different perspectives / points of views to consider
11. Compiling information for easier comprehension

Detailed Question Information:

Full List of Entities People Feel Are Responsible for Creating Safe Generative AI Experiences

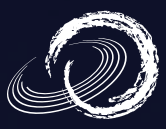
1. Parents
2. Governments
3. Companies / platforms
4. Schools
5. International bodies
6. Teens
7. Organizations / associations

Full List of Education Desired to Adequately Prepare for a Future with Generative AI

1. Education on how to use the technology properly for future advantage
2. Education on potential downsides / negatives
3. Education on how to use the tool for benefit (e.g., enhancing existing work they create)
4. Education on how to think critically about the output

Full List of Ways People Want to Learn More about Generative AI

1. Online/virtual classes
2. In-person classes
3. Social media
4. Online articles
5. Books



Family
Online Safety
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