

Embedding the Audience

Putting audiences
at the heart of Generative AI



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Foreword

Generative AI (or Gen AI) burst into the public's consciousness at the end of 2022 when OpenAI launched ChatGPT. Within two months of its launch, ChatGPT had 100 million users, a milestone that took TikTok 9 months, and Facebook four years. Since then, many media organisations have been looking at what Gen AI means for them, their audiences, and the wider industry.

We believe it is vital the BBC experiments with Gen AI and does so responsibly. This means being tuned into the views and expectations of audiences, talent, artists, and the wider creative industry. The issues Gen AI raises are complex and often high-profile, but we shouldn't shy away from exploring how Gen AI might bring value both in how we work and what we make.

As part of this, it's vital we have a good understanding of what audiences think and want when it comes to Gen AI. Much of this learning will come through experimentation and pilots, but audience research also has an important role to play in ensuring we keep in step with audiences. Unsurprisingly for such a new field, we found there has been relatively little in-depth research into audience views of how Gen AI is used in media. Our research aims to help fill that gap and has highlighted a few critical insights.

- **First** – audiences believe that Gen AI is the real deal – a permanent, significant and disruptive step-change in technology and media.
- **Second** – audiences are understandably nervous about how Gen AI might be used in the media, including how it may impact creative roles, and they want reassurance from media companies about how they will engage with Gen AI.
- **Third** – many audiences have already developed an instinct about where they are likely to be comfortable – or not – with the use of Gen AI in media. For example, we found that while audiences are open to the use of Gen AI to further personalise media services, the use of Gen AI to produce news content was seen as much more challenging.

We also uncovered a great deal of nuance in how audiences think about the use of Gen AI across audio, video and journalism and many use cases where audiences' views are 'yes...if'. With Gen AI, the detail matters to audiences.

The research also supports and amplifies the guiding principles the BBC has already developed to guide our work in Gen AI. Audiences emphasised the need for media companies to deliver value to audiences; to put people first, and to always be transparent in their use of Gen AI.

While this report helps us understand how audiences view the use of Gen AI in media, it is not a roadmap for future development and it is important at the outset to set out why.

First, this report does not consider the views of other communities like creative talent or production teams, whose views are important to how any media organisation uses Gen AI. Nor does it consider the technology itself, including questions of accuracy and hallucinations.

Second, this is new territory for many audiences and their views are likely to evolve as the potential of Gen AI becomes better understood. Further use of Gen AI as well as media coverage of Gen AI will also play a big role in shaping audience expectations.

So while the research lays out what audiences have told us, it should not be read as an articulation of future BBC intentions in this space. We will reflect carefully on what audiences have told us and use it as one input to shape further experimentation.

We also recognise that many of the issues raised in the report are not unique to the BBC and that the BBC does not have all the answers. We believe it would be helpful for all media organisations to continue a broad-based and open discussion on Gen AI and we are planning an event later this year to bring the media industry together to discuss the opportunities and challenges of Gen AI.



Peter Archer
BBC Programme Director
of Generative Artificial Intelligence



Executive summary

Many media organisations, including the BBC, are experimenting with Gen AI in order to better understand the opportunities and challenges it brings. This includes experimenting with both how we work and what we make. This is a complex and challenging territory, and we must listen hard to what our audiences think and want – as well as views from talent, creative and business teams, and the wider industry.

To help us better understand audience views, the BBC, working with Ipsos, researched public attitudes about Gen AI and its use in media. Working alongside BBC Studios and the Australian Broadcasting Corporation, Ipsos carried out both quantitative and qualitative research in the UK, USA and Australia. Full details of the method can be found in the Appendix 1.

Our key findings are:

- 1. Many audiences believe Gen AI will be different, disruptive and permanent.** Unlike other recent technological developments (3D, AR, Metaverse), many audiences feel there is something different about Gen AI. They believe it could have a profound and enduring impact on society and the media industry – and are concerned it may have a negative impact.
- 2. Audience understanding of Gen AI is informed by both negative pop culture depictions** that often portray AI as evil as well as coverage from news media that can be perceived by audiences as sensationalist. This can leave audiences concerned about the potential impact of Gen AI.

3. Audience concern with the use of Gen AI in media varies by modality and use case.

In particular:

- a. There was some openness to the use of Gen AI in audio content.** Many respondents felt there was space for Gen AI in the creation of audio content, particularly where it feels like an extension of existing technology.
- b. There was more concern about using Gen AI for video content.** The limited use of Gen AI for personalisation or operational functions is accepted, but many respondents felt going beyond this could undermine human connection and devalue artistic skills.
- c. Using Gen AI in journalism is felt to be very high risk.** While audiences recognise Gen AI could bring value in a few limited ways (e.g. the reformatting of articles from text to audio), there are concerns about its potential to spread some misinformation, deepen societal division, and replace human interpretation and insight.

4. Our participants indicated there are three actions they would like media companies to take when using Gen AI in content creation

- a. Demonstrate value:** Participants said Gen AI needs to bring value to audiences' experiences (e.g. by being useful or bringing joy) and its use in the media should improve, augment and enhance existing services.
- b. Put people first:** Media organisations should ensure that humans are in control of how Gen AI is used and always 'in the loop'.
- c. Act transparently:** Media organisations should be open and transparent about their use of Gen AI.

5. Public Service Media will be held to a high standard.

While audiences expect all organisations to use Gen AI responsibly, they are likely to hold public service media organisations to a particularly high standard given their public-facing missions and access to public funding.

This research will help inform how the BBC will think about Gen AI going forward. In the hope that the research will help other media organisations, this report represents a full and frank replaying of what our participants told us. Nothing in the report should be taken as an indication of how the BBC will harness this developing technology in future.



Introduction

At the end of 2022, ChatGPT was launched to an unsuspecting public. Since then, the pace of development of Generative AI (Gen AI) has been unrelenting. For example, many Gen AI models are now ‘multi-modal’ – working across audio, text and vision – and Gen AI services are increasingly able to access the web to supplement the data in their underlying models and provide up-to-date answers to user’s queries.

Most experts agree that Gen AI is likely to have a significant impact on the way we live and work in the future. In particular, Gen AI is likely to have a material impact on the media industry. In part, this is because Gen AI services make it easier, quicker and often cheaper for anyone to create text, audio, imagery and video, but also because Gen AI technology has the potential to help established media players be more productive and find new sources of value for consumers. Andreeseen Horowitz, the venture capital firm, called making creative content “the first killer use case of AI”, pointing to many examples of Gen AI services across audio, text and video creation.¹

While there are opportunities, there are also many challenges. In particular, while many media companies, including the BBC, are experimenting with Gen AI, the value remains unclear. For established companies at least, Gen AI is likely to bring a new wave of disruption to established business models (for example through new Gen AI news aggregators). We are already seeing the misuse of Gen AI tools to create ever more realistic disinformation.

To help add to our understanding of what audiences think and want, the BBC worked with Ipsos to answer three questions;

- 1** What is the current level of awareness and understanding of AI and its applications amongst audiences?
- 2** How do audiences feel about Gen AI, what do they believe about Gen AI and why do they hold those beliefs?
- 3** How do audiences feel about different potential uses of Gen AI across video, audio and journalism?

The BBC and Ipsos developed a phased, deliberative research approach to answer these questions. The study began with a **Cultural Deep Dive**, to identify the macro forces that shape audiences’ relationship with AI to look at how this might evolve in the future. This included:

- **Desk Research:** a comprehensive review of Ipsos and other data on audience understanding and perceptions of Gen AI

- **Semiotic Review of Fictional Representations:** investigating past and present representations of AI to understand underlying perceptions driving attitudes to Gen AI

At the core of this study was a deliberative approach with audiences themselves, through extended two-hour **Scenario Testing Workshops**. Here we focused on:

- Assessing current understanding of AI and Gen AI, and pressure testing how those understandings hold (or don’t) in the face of new developments/information
- Exploration of scenarios with potential media use cases to understand how comfortable or not audiences are with different applications of Gen AI. These scenarios increased in complexity and role of Gen AI allowing participants time and space to familiarise themselves with potential futures, think, and change their minds

These workshops took place in November 2023 in three markets: the UK, the USA (with BBC Studios), and Australia (with the Australian Broadcasting Corporation). Across 15 workshops, we spoke to 150 participants, covering a mix of ages, locations, income, ethnicity, and level of digital familiarity.

The audience we spoke to consisted of individuals aged 18–65. Participants were grouped into

workshops according to three age bands: 18–34s, 35–54s, and 55–65. We spoke to individuals across a mix of urban and rural locales (excluding Australia, see appendix), social grades, and racial/ethnic backgrounds. We ensured our participants represented a spectrum of digital familiarity, with separate workshops for those with high/medium and low/medium familiarity.

Throughout this report we contextualise our findings with relevant research from other studies.



¹ a16z (from @venturetwins on X) (Posted 12/2/24 16:21, accessed 21/5/24)

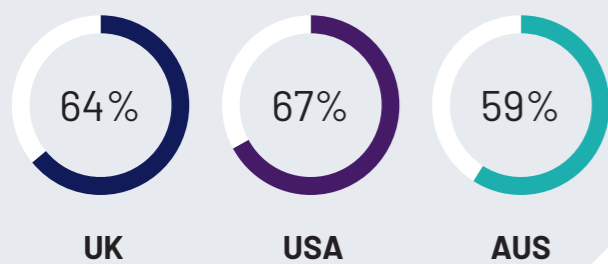
How do audiences use Generative AI currently?

Awareness of AI and Generative AI is high but there is currently limited use of Gen AI tools

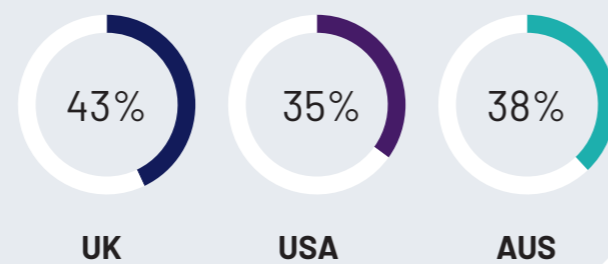
Awareness of the term 'Artificial Intelligence' is high. ONS data shows that 91% of UK adults have heard of 'Artificial Intelligence'² while research from Pew indicates similar levels of awareness in the USA (90%).³ High awareness of the term isn't surprising given how often it is referenced in popular culture and public discourse.

Perhaps more surprising is the relatively high proportion of audiences who agree that they have a good understanding of what AI is – around two-thirds in the UK and USA. Audiences are less sure they know which types of products and services use AI.

% Of those who agree they have a good understanding of what artificial intelligence is⁴

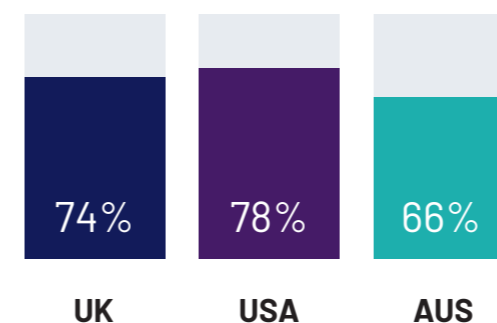


% Of those who agree they know which types of products and services use artificial intelligence⁵



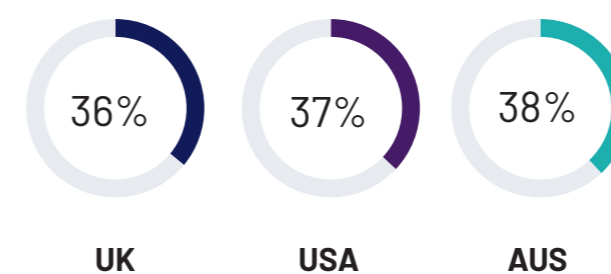
Awareness of the terms 'Generative AI' or 'Gen AI' is now relatively high across the three markets with a majority of people telling us they have heard of it.

% Of those who have heard of 'Generative AI'⁶



However, during our qualitative workshops we also found that when our research participants talk about AI, they are often referring to Gen AI; and for many these two ideas have become conflated. While those who are more familiar with technology are more aware of AI being used in other types of applications, like recommendations on iPlayer, there is little practical knowledge of what these terms mean in practice, especially among those aged 55+.

% Of those who have used 'Generative AI'⁷



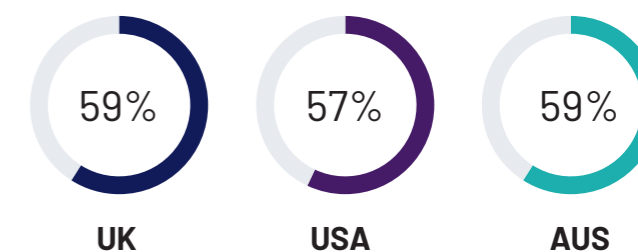
When it comes to actual use of Gen AI services, the story is more nuanced. On one hand, only around a third of the audience has ever used Gen AI. This is relatively low compared to high rates of awareness, but tallies with what we found in our qualitative workshops: awareness of Gen AI was driven by media buzz and few reported personally using Gen

AI tools like ChatGPT or Midjourney. It is also low compared to other technologies like social media.

On the other hand, Gen AI is still a very new technology and consumer uptake has been relatively quick compared to other internet consumer tech and services. ChatGPT famously hit a million users in just five days and had 100 million monthly active users just two months after launching. Comparatively, it took TikTok nine months after its global launch to reach 100 million users and Instagram over two years.⁸

We also believe it is highly likely that use will increase in the coming months and years – particularly as Gen AI is increasingly integrated within existing services – like search and mobile phone operating systems. This raises the question of whether audiences will even be aware that they are using Generative or another form of AI.

% Of 16-34s who have used 'Generative AI'¹¹



There are also important differences by age. Those aged 16-34 are far more likely to have used the technology in comparison to older groups, particularly those 55+. In the UK 59% of 16-34s have used Gen AI. Moreover, in the UK a quarter of 16-34s are now using Gen AI at least once a week, a number that drops to just 3% among those 55+.⁹ Research by Ofcom, exploring the use of Gen AI in the UK, found most users (58%) were using it for fun while 48% were using it to chat and explore the technology – indicating many are still in the early stages of exploring Gen AI.¹⁰

² Understanding AI uptake and sentiment among people and businesses in the UK (ONS, June 2023)
³ What the data says about Americans' views of artificial intelligence (Pew Research Center, Nov 2023)
⁴ Global Views on AI: How people across the world feel about Gen AI and expect it will impact their life (Ipsos 2023)
⁵ Global Views on AI: How people across the world feel about Gen AI and expect it will impact their life (Ipsos 2023)

⁶ UK data from an online, device agnostic survey carried out by Ipsos for the BBC in February 2023 with 2,174 participants [How familiar or unfamiliar are you with Generative Artificial Intelligence (Gen AI)?]. USA data from survey carried out by Dynata for BBC Studios in November 2023 with 1000 participants aware of the term 'Artificial Intelligence'. Australian data from survey carried out by the ABC Panel in Nov 2023 with 1,491 participants aware of the term 'Artificial Intelligence'. All surveys were nationally representative. Data from the USA and Australian surveys includes those who said they had heard of Gen AI after being given a description of the technology.
⁷ UK data from an online, device agnostic survey carried out by Ipsos for the BBC in February 2023 with 2,174 participants [In the past six months (so between now and July 2023), how often, if at all, have you used a Generative AI (Gen AI) tool such as ChatGPT, Jasper, Bard, Bing, or Perplexity?]. USA data from survey carried out by Dynata for BBC studios in November 2023 with 1000 participants aware of the term 'Artificial Intelligence'. Australian data from survey carried out by the ABC Panel in Nov 2023 with 1,491 participants aware of the term 'Artificial Intelligence'. All surveys were nationally representative.
⁸ ChatGPT sets record for fastest-growing user base – analyst note (Reuters, Feb 2023)
⁹ Data from nationally representative survey carried out by Ipsos for the BBC in February 2023 with 2,174 participants.
¹⁰ Who is using Generative AI? And why? (Ofcom, Dec 2023)
¹¹ UK data from an online, device agnostic survey carried out by Ipsos for the BBC in February 2023 with 2,174 participants [In the past six months (so between now and July 2023), how often, if at all, have you used a Generative AI (Gen AI) tool such as ChatGPT, Jasper, Bard, Bing, or Perplexity?]. USA data from survey carried out by Dynata for BBC studios in November 2023 with 1000 participants aware of the term 'Artificial Intelligence'. Australian data from survey carried out by the ABC Panel in Nov 2023 with 1,491 participants aware of the term 'Artificial Intelligence'. All surveys were nationally representative.



Before, AI was almost a tool that we used to benefit us as a society. And now with Generative AI, it's becoming its own ecosystem almost. It's also coming into the realm of arts, which is something that we always thought was very human. It's blurring the lines - what's human? What's art? And what's robot?"

USA, 18-34, Medium/High Familiarity



Audience perspectives on Generative AI

Audiences believe Gen AI will have a profound impact on society

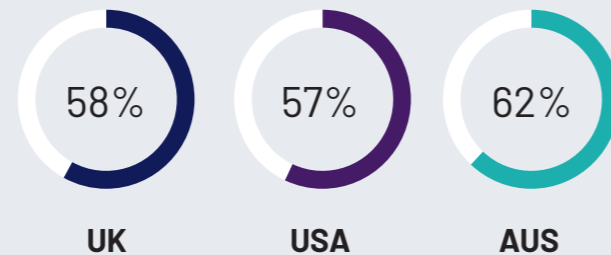
Over the last twenty years, a wave of new technology has hit audiences. Many innovations, such as 3D TV, Virtual Reality, NFTs, and the Metaverse promise to revolutionise the way we live but fail to live up to expectations, at least in the short term. However, some, like the Internet and the smartphone, have had a tangible impact on our daily lives, transforming business, culture, and society. To our participants, Gen AI seems like the latter.

The audiences we spoke to in the UK, USA, and Australia indicate that Gen AI feels permanent, disruptive, and new – more like a world-shifting innovation, like the Internet, with the capability to drastically change society.

“I used ChatGPT to help me find answers, it gives you generic answers, but sometimes it gives you answers that I hadn't thought about so this can be useful to find resources.”

USA, 18-34, Medium/High Familiarity

% that agree products using AI will profoundly change daily life in future (global average 66%)¹²



“We weren't active participants in [AI] before, it was in our everyday lives and we didn't really recognise that. But now we can play with it and do lots with it, it's the accessibility of it and us being able to play with it.”

UK, 18-34, Medium/High Familiarity

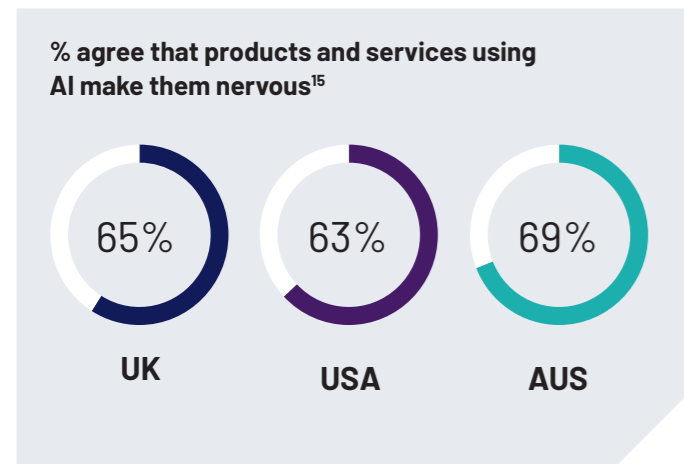


If I like a particular author or something, I wanna see their creativity and I like them because of their mind. I want their creativity. I can't really see that they're using a machine to generate ... it's just lazy.”

UK, 18-34, Medium/High Familiarity

But audiences are not sure the impact will be positive

A majority of audiences across the UK, USA and Australia, say that the products and services using Gen AI make them nervous. In the UK, data from Ipsos shows that the public are more likely to think that AI is more of a risk (39%) than an opportunity (19%)¹³. Audiences are least comfortable with AI replacing humans for advice or key decisions – including directing media (46% uncomfortable), personalising social media content (59%), and directing political content and advertising in media (67% uncomfortable).¹⁴



One of the reasons for this negative perception may be the reporting of AI. Many of the audiences we spoke to feel that the news and media around Gen AI can be negative and sensationalist, focusing on risks rather than potential opportunities, meaning they find it hard to know what is accurate versus overblown. These headlines are top-of-mind for audiences, and they are quick to mention claims from prominent personalities, for example participants cited Elon Musk's claim that 'AI is one of the biggest threats to humanity'¹⁶ or viral images like the Pope in a puffer jacket¹⁷.

They also point to the views of experts, many of whom have publicly expressed their concern about AI.



I feel like you never hear any positive news about AI. I'm sure there is lots of really good stuff that it is doing. But it's always like job losses and the dangers, you know."

UK, 55+, Low/Medium Familiarity

Whether well-founded or not, we found in our workshops that these beliefs and concerns culminate in one key fear: that Gen AI has the potential to overtake human skill and connection. This raises a particular issue for media companies who wish to explore the use of Gen AI given the central role that human creativity has in the creation of media content.



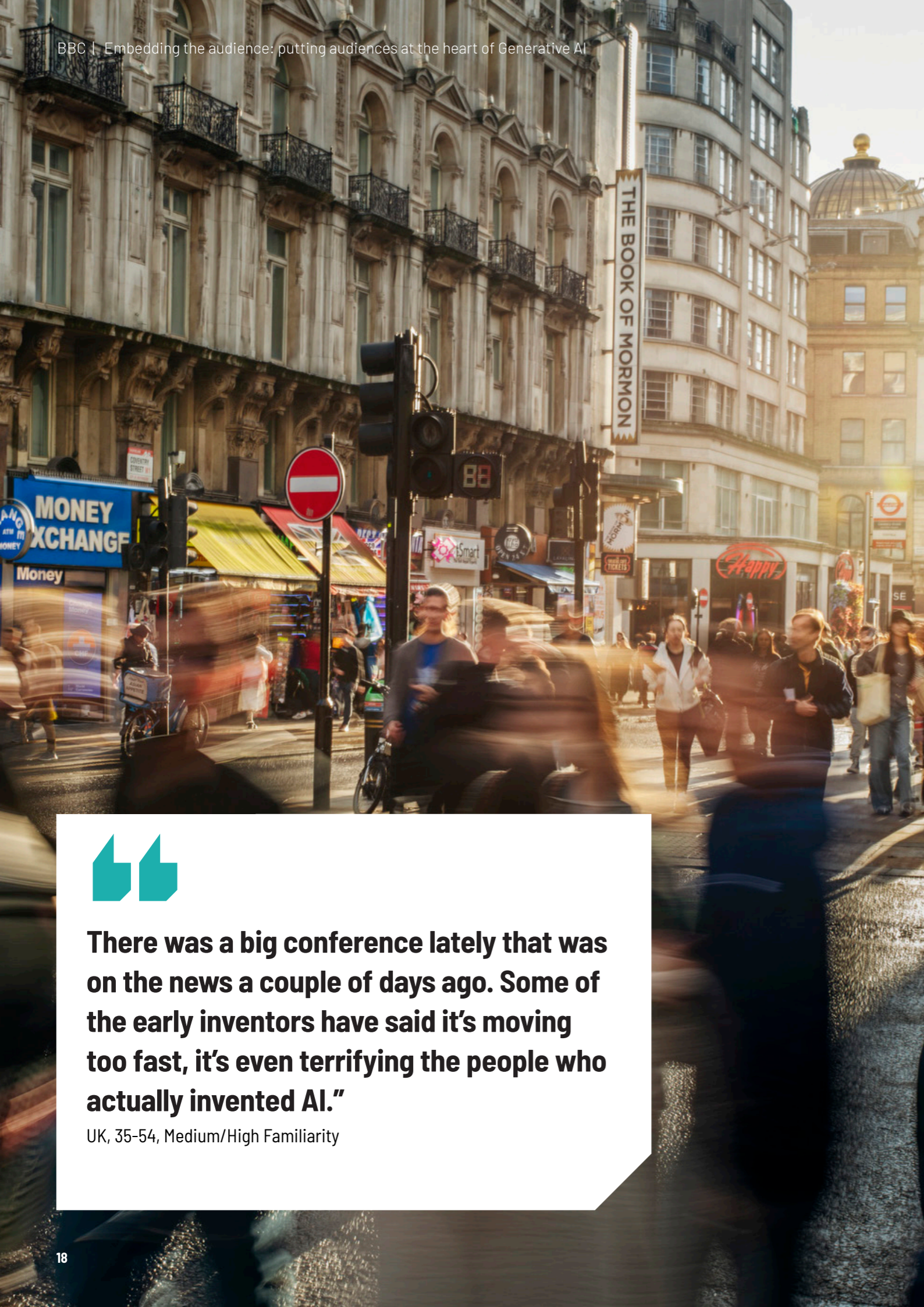
I'm aware of ChatGPT, I have friends who use it. I know it's scary for educators right now. Like a full paper, can be written, and they have no idea, you know, there's no way to like research, that it was a duplicate or anything like that. I think for myself. I could use help with creativity and maybe learn from it. But I think it can cause us to be lazy and utilizing it too much and having AI really surpass our intelligence."

USA, 35-54, Medium/High Familiarity



It's kind of scary to think that potentially our jobs could become redundant one day. So yeah, quite scary."

UK, 55+, Low/Medium Familiarity



There was a big conference lately that was on the news a couple of days ago. Some of the early inventors have said it's moving too fast, it's even terrifying the people who actually invented AI."

UK, 35-54, Medium/High Familiarity

Audiences say they want more regulation and oversight of AI

Meanwhile, the audiences we spoke to said they did not have faith in tech companies to roll out Gen AI in a way that feels safe, ethical, and secure. In both the UK and USA, only 29% of people trust companies developing AI to have overall responsibility for ensuring it is safe¹⁸ while in Australia less than 40% of people have confidence in tech companies to develop, use, and govern AI.¹⁹

Audiences believe that Gen AI is developing exponentially without safeguards or oversight from trusted institutions. In their global study, KPMG found 71% of people believe AI regulation is necessary, while only 39% believe current governance and regulations are sufficient to ensure safety.²⁰ In the UK and USA around three-quarters of people agree powerful AI should be tested by independent experts to ensure it is safe.²¹



At least with normal AI like Google, and the series [Netflix AI use of suggested content] I use those every day. They don't really feel like too much of an invasion of privacy. Where it's AI that hasn't been created before [Generative AI], it feels like it's a bit loose, it's unregulated - a bit more like it's free to do what it wants, without being checked by anyone."

UK, 18-34, Low/Medium Familiarity



What I understand is the uneasiness comes from a lack of regulation of it at the moment. There might be regulation, but as far as I know, not a lot. It's kind of uncontrollable at the moment, which is what makes it scary, because the limits are almost endless with it. The longer these machines go, the cleverer they get and the unknown - that's scary. And to what? What is the limit of it?"

UK, 18-34, Low/Medium Familiarity



There's big tech companies who have already irresponsibly used user data, there are certain tech companies who I would trust more though, but I think that this kind of thing needs to be regulated."

USA, 18-34, Medium/High Familiarity

¹⁸International survey of public opinion on AI safety (UK Government, Department for Science, Innovation and Technology and Centre for Data Ethics and Innovation, 27 Oct 2023)
¹⁹Trust in Artificial Intelligence: Global Insights 2023 (KPMG, 22 Feb 2023)
²⁰Trust in Artificial Intelligence: Global Insights 2023 (KPMG, 22 Feb 2023)
²¹International survey of public opinion on AI safety (UK Government, Department for Science, Innovation and Technology and Centre for Data Ethics and Innovation, 27 Oct 2023)



I just want to make sure it's regulated and that there's clear guidelines so that if people want to know, they can find out and it's clear the people know."

UK, 55+, Low/Medium Familiarity

There's general concern about AI-generated media, but this isn't uniform

Many of those we spoke to have a negative view of the use of Gen AI in the media.

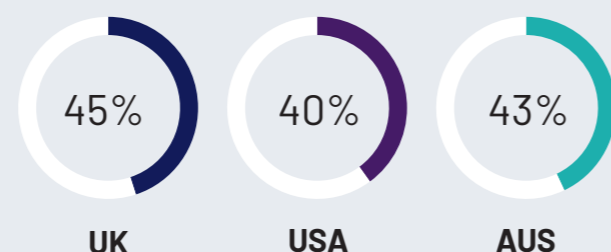
This sentiment is supported by Ipsos data that shows lower levels of optimism for the future of AI in entertainment in the UK, USA, and Australia compared to the global average.²² This reflects a trend whereby emerging economies tend to have more enthusiasm for new technologies and the opportunities they can provide while established markets can be more sceptical that the disruption will have a positive impact.



I still think that Gen AI would have more positive outcomes in the future, it has the potential to solve some of the world's pressing problems. Although it is still in its early stages, I still feel that it has the potential to make a more significant and positive impact in our world today and in the future."

USA, 35-54, Low/Medium Familiarity

% that agree AI will make entertainment options better in future (global country average: 51%)²³



However, while it's clear there are high levels of concern about the use of Gen AI in the media, we also found there are groups who are excited about its potential with a significant minority believing it's likely to make entertainment better in the future.

More generally, we also tend to see more optimism among younger groups, who are far more likely to feel they have a good understanding of AI than those in the 55+ category. These optimists often feel they know enough about the potential of Gen AI to be excited by its benefits.



I think the fact that you can generate different headlines to choose from is also really great for the journalist. Just kind of, brainstorming and seeing ideas, things that they wouldn't have come up with."

AUS, 35-54, Medium/High Familiarity



It destroys creativity. I'm an author, and a lot of people who have never written a book before, they just use ChatGPT and write a whole book. I'm a musician as well. It just destroys creativity for people like myself. And it's not fair because someone who has never written a song before, he's able to write [one]. He or she's able to write a song within two minutes by using ChatGPT, so it does take a lot of jobs from people like myself."

UK, 35-54, Low/Medium Familiarity



These AI optimists tend to have higher levels of knowledge about Gen AI and often have experience using Gen AI tools themselves. Often, their own use of Gen AI means they have had a 'wow' moment with the technology. This may indicate that both knowledge and use reduce nervousness and fear, but it may also be that early adopters of technology are generally less nervous and fearful of new technologies.

Importantly though, sentiment toward AI-generated media isn't static. Some of the people we spoke to have oscillated between feeling optimistic about its potential and feeling concerned about the tech. This group often accept that the technology is likely to play an increasing role in their life (whether they like it or not). They tend to have higher levels of familiarity with Gen AI but can also see the risks of the tech.



After kind of keeping up with the News with all this Gen AI stuff, I began to learn that it's actually kind of a little scary in a way, taking jobs away and working out of its limits where we don't know how far it can go, as we're in the state of data collection... So the way I feel about it, I'm hot and cold. But I feel like it's going to come to some point where is that really my choice anymore? So, I guess we'll see what happens."

USA, 18-34, Medium/High Familiarity



I grew up watching the Matrix films, so when I first heard about AI, when all the stuff about ChatGPT was coming out, my mind automatically went to that. But I'm a PhD student. So now I can see the benefits of AI. I use the Bing chat to summarise articles, to give me sources. It makes my life easier, so now I can see the benefits."

UK, 35-54 Low/Medium Familiarity



Malevolent pop culture depictions may contribute to negative feelings about AI

There are likely to be many reasons so many are anxious about AI and its potential impact. Its seemingly impressive feats, broad application and rapid development have led to concerns from both experts and non-experts alike. Additionally, the concept of Artificial Intelligence is not new – the idea of AI as a powerful, human-like entity with the capacity to exceed human intelligence has been a mainstay of representations of AI in pop culture for decades. For example, AI plays a key role in films like *The Matrix*, *The Terminator*, and *2001: A Space Odyssey*. This may also play into concerns about the potential impact of AI.



I've grown up watching the Terminator, and Skynet's basically the company that turns Gen AI on the humans, and then the world gets all destroyed or whatever. So usually, whenever I hear, like Gen AI or someone talks about it, I think of Skynet initially, and the technological advances it has, whether good or bad."

USA, 55+, Medium/High Familiarity



I'm thinking Robocop and Terminator; terminate, death, destruction."

UK, 35-54, Low/Medium Familiarity



We've grown up with these films that are set in the future and there's always the robot uprising, and everybody dies."

UK, 18-34, Low/Medium Familiarity



[My perceptions come from] films where it's gone wrong... obviously The Terminator, but that's ultimately the most terrible scenario. Culture has led to those beliefs that this could be the end of the world like that. Also people like [Elon Musk] talking about the dangers of AI."

USA, 18-34, Medium/High Familiarity

AI is ubiquitous in fictional content, shaping audiences' understanding of it. The findings from Ipsos' semiotic analysis show us that different conceptions of AI have been reoccurring in myths, legends, and media from ancient civilisations to the present. Our research identified five key themes that reoccur within AI content, illustrated below with examples from film and TV:

1. Media Replacement

An emergent theme portrays AI replacing the human's role in the creative industries. In the 2002 film, *Simone*, a director decides to replace an actress with a computer generated woman he can animate. In the anime *Sword Art Online*, the virtual idol Yuna becomes a media sensation, hosting shows and concerts. And in the 2023 Black Mirror episode *Joan Is Awful* the use of AI is taken to the extreme, showing hyper-personalised content recreating audiences' lives in detail. These examples portray a topic that has been at the forefront of debates since the popularisation of Gen AI.

2. Becoming Human

AI is represented as acquiring consciousness and emotions considered typically human. We see this in films such as *Ex Machina*, *Automata*, *Eva* and *Westworld*, where conscious machines are so similar to humans that the protagonists can come to doubt their own humanity or in films like *Nirvana*, where the character of a game becomes sentient and feels pain. In other instances, AI is presented as more humane than the humans around them. In Spielberg's *A.I. Artificial Intelligence*, a child robot deals with the trauma of being abandoned by its human "mother". In the TV series *Humans* and in the video game *Detroit: Become Human*, androids are driven by emotions and seek recognition and independence. These depictions all prompt discussion about what it means to be "human", to be alive and conscious, examining the boundaries between humans and machines.



I feel that it just reminds me of Terminator. It just reminds me of all the films that I used to watch in the 80s and 90s. It feels like it's gonna become a reality. But I don't think it's gonna end well for us as human beings. And I also think that a lot of our jobs are gonna be taken from us. I believe that's gonna happen. So yeah, I think it's more on the con side than the pros."

UK, 35-54, Low/Medium Familiarity

3. Rebellion

AI is created as a tool/slave under human control. However, if AI develops consciousness, this dynamic leads to an uprising from the machines. We see this in books like Isaac Asimov's *I, Robot* and Phillip K. Dick's *Do Androids Dream of Electric Sheep?* (which later was adapted for screen in the movie *Blade Runner*). Video also worked to popularise this narrative through films like *Metropolis* where humanoid-synthetic-servants rebel against humanity and *Westworld* where androids rebel to escape working as "hosts" in a violent theme park. In the comedy animated film *The Mitchells vs. the Machines*, a highly intelligent virtual assistant rebels against its creator after discovering it will be replaced. This theme highlights concerns about power dynamics and the fear of humans losing the upper-hand.

4. The Doomsday

A switch in power dynamics often leads to humans being enslaved or annihilated by machines. This narrative is clear in novels like *I Have No Mouth, and I Must Scream* where a sentient supercomputer destroys humanity. It also appears in movies like the *Terminator* franchise, where the defence super-computer Skynet becomes sentient and, threatened with destruction, wages a war against humankind. In *The Matrix*, AI has won the war against humans and has enslaved them to be used as a source of fuel, trapping them in a virtual world. In the animated TV series *The Transformers*, robot slaves have rebelled, exterminating their alien creators before starting a war amongst themselves. This theme highlights concerns about our increased reliance on technology and the risks of unchecked advancements.

5. Artificial Friend

Positive portrayal of human-AI interactions, depicting AI as a companion, supporting humans in their activities and adventures. We see this in *Big Hero 6* where a robot becomes the protagonist's comedic sidekick, as the droids R2D2 and C-3PO are for Luke Skywalker in the *Star Wars* franchise. It's also evident in the movie *Robot & Frank* where a simplified version of AI works as a carer for the older protagonist, becoming his trusted companion. In the comedy drama *Brian and Charles* a lonely inventor creates a robot whom he feels builds a relationship. In *Star Trek*, *Lieutenant Commander Data* is a loyal member of the *Enterprise* and further examples can be found in the movies *I, Robot*, *Interstellar*, *Short Circuit*, *Aliens* and *Terminator 2*.

The thread that ties the first four of these themes together is the fear AI will surpass humans and take over society. While one (Artificial Friend) is framed positively, fictional depictions of Gen AI as assistive are few and far between, as the dominant narrative is one where Gen AI risks replacing, dominating, or eradicating humanity.



What makes me nervous is the personal being eliminated. I almost feel Gen AI is going to replace the human race."

USA, 55+, Medium/High Familiarity



Audience perspectives on Generative AI in the media

As well as understanding how audiences think about Generative AI (Gen AI) as a new technology, we wanted to understand what audiences thought of potential use cases across audio, video and news. In particular, we wanted to understand where our participants were more or less concerned with the use of Gen AI.

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We found that how comfortable or not audiences are with potential uses of Gen AI appears to depend on three factors:

- Domain: participants were more comfortable with the use of Gen AI in audio than video; and more comfortable in both audio and video than in news.
- Human oversight: participants were more comfortable with the use of Gen AI when it was being used as an assistive tool to support human creation; than when it was used to create content autonomously or with little human input or oversight.
- Extent of use: participants were more comfortable with the use of Gen AI to contribute to part of an overall piece of content; and much less comfortable with the use of Gen AI to create the entirety of a piece.

Dependent on these three key factors, the use of Gen AI was assessed by our participants as being on a spectrum from 'low stakes' to 'high stakes':

- Low-stakes use cases are examples of where audiences feel broadly comfortable with the use of Gen AI and can see its value. In general, this is where participants believed Gen AI felt contained and limited, with a clear role as a support tool for humans. Examples include using Gen AI for:
 - For inspiration – for example, to brainstorm on creative projects, similar to how audiences believe search engines are likely used for inspiration
 - To report data – for example 'hard facts' like the weather, markets, or sports scores, or create summaries based on human reports/articles
 - In production processes – for example, as a tool to make activities like editing, personalised recommendations and SFX more cost-efficient
- High-stakes use cases are examples where the people we spoke to felt really

uncomfortable with the use of Gen AI and its value was undermined by the risk it posed. Predominantly this was where Gen AI felt autonomous, disruptive and like it was replacing human roles vs enhancing them. Often it was when participants felt Gen AI was encroaching on territory that was innately 'human'. Examples include using Gen AI:

- To replace creativity – for example, creating entire works from scratch and thereby taking jobs from human creatives
- To diminish connection – for example, AI-generated people replacing humans, especially where connection is valued
- For disinformation – for example, to generate disinformation that misleads or perpetuates bias
- For independent thinking – for example, where AI uses its 'judgement', especially in 'human' skills that require sensitivity or empathy

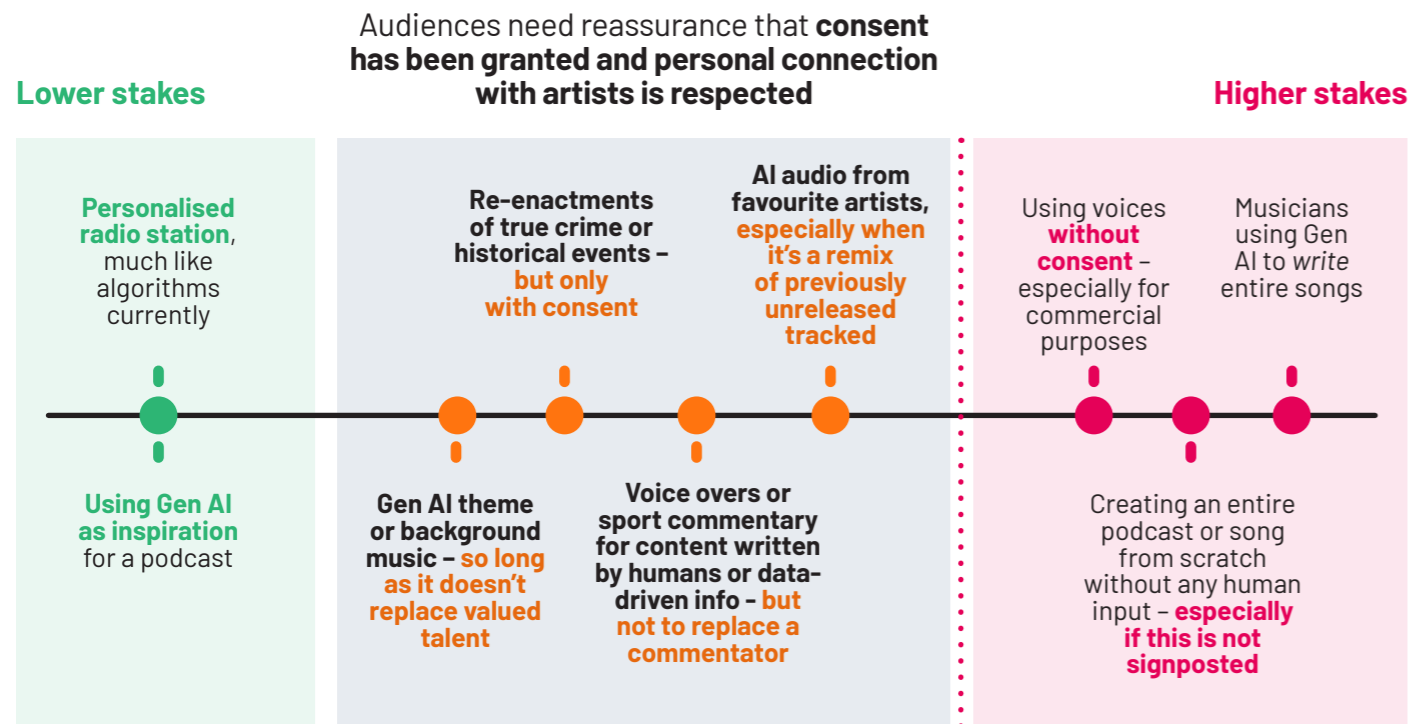
On the next page, we discuss what our participants told us about their level of concern with the use of Gen AI across audio, video and news in different contexts, including the tricky grey middle where audiences told us they could be comfortable with its application, but it depended on the circumstances.

Audio

The use of AI in audio is moving at pace. We have started to see podcasters using AI-generated voices and streaming services offering personalised playlists tailored by Gen AI.

Of the three areas we explored, the use of Gen AI in audio felt more comfortable than in video and news, with many of the cases presented feeling like an extension of pre-existing technology

that participants told us they were more likely to be comfortable with. This did come with caveats; the people we spoke to expressed concerns about Gen AI replacing favourite artists or undermining personal human connections. We've charted the level of concern with different scenarios below from the 'lower stakes' to 'higher stakes' scenarios.



Feels like an extension of preexisting technology

Red Line: High stakes audio use cases risk replacing favourite artists and popular commentators, undermining personal connection with media and human skill



Audio - Lower Stakes

The groups we spoke to told us they felt quite comfortable with the idea of Gen AI being used to create a personalised radio station with many feeling this was similar to existing algorithmically-driven music streaming. There were occasional references to privacy implications, with participants mentioning the vast data collection required to do this. But overall there was the sense that many companies already have this data so they may as well use it to enhance audiences' experiences.

Using Gen AI to help with ideation and inspiration for podcasts also felt like an extension of the current use of technology to participants, similar to how they imagine podcasters may use search engines to help with research. Levels of comfort were particularly high if the topic was seen to be 'scientific' or 'objective' with little need for nuance, but less comfortable if it was a highly sensitive more opinion-based topic. There was, however, some concern about oversight, with

participants indicating that they would expect a human to fact-check any information that was generated by AI before using it in the podcast.



“It can pick up your likes and dislikes, and showing you things you might be interested in, putting new music forward, new podcasts. It'd be good to be used for that.”

UK, 35-54, Medium/High Familiarity

Audio - Medium Stakes

Other scenarios made those we spoke to feel more uncomfortable. When presented with the idea of AI generating background music or theme tunes there was a sense that, while this might not impact the quality of a podcast, it would take away from the authenticity of the content. Participants felt it would devalue those moments of joy that are created when hearing an iconic theme tune or jingle. Responses to the use of Gen AI for voiceovers or sports commentary (written by a human) followed a similar pattern, with some feeling it could be useful if it was just reporting sports scores but were concerned about the

serendipitous spontaneous moments of joy that are sparked by the human connection between listeners and commentators would be lost.

The use of Gen AI for re-enactments of true crime or historical events also falls into this middle space. There was recognition that it could make content more immersive and really bring stories to life. But others were concerned that using Gen AI to re-enact traumatic or sensitive events was ethically problematic and were particularly uncomfortable with its use without the consent of the people the Gen AI would be depicting.

Audio - Higher Stakes

This is where we saw the red line creep in with respondents feeling really uncomfortable with the use of voices without consent. Participants questioned the legality of doing this, particularly if the person whose voice was being generated was still alive (rather than a historical figure). Not only was this felt to undermine human artistry but there was a sense this felt unfair on the person.

The importance of fairness was apparent throughout the discussions and underlying much of the discomfort was the idea that AI may be replacing humans, leading to job losses in the audio industry. Participants expressed a lot of respect for creative's work and did not want them to be replaced by AI. Concerns about fairness appeared in other 'higher stakes' scenarios too, with participants telling us they did not want Gen AI creating entire pieces of content from scratch, be that music or speech. Many felt that this was just lazy and undermined human skill. Participants were also concerned that AI-generated content might 'trick' them, letting us know that they would feel a real betrayal if they listened to something they enjoyed, or felt they had a connection with, and later found out it was AI-generated.

In discussion about AI recreating a celebrity's voice as part of a podcast



To what extent has he given his consent and to what extent is [the content] representative of his views? Or is it representing the people who created [the podcast]? I would want to know before I can listen to it.”

UK, 35-54, Medium/High Familiarity



I think if you found out it was AI at the beginning, you'd listen to it in an entirely different way. Finding out that it is AI at the end, I think, would absolutely change your opinion of what you've just listened to.”

UK, 55+, Medium/High Familiarity



The sense of betrayal, or cheating was felt more acutely when participants were asked to imagine the use of Gen AI in their *favourite* audio content. They were more protective over music and programmes that they personally were a fan of. Some told us part of the reason they tune in is due to a feeling of personal connection with the content or creator, so using Gen AI in their favourite show could completely undermine the value of the content for them.



We're moving into where this is all becoming completely normal and we're just supposed to accept that it's part of life, it's taken over. There are singers who have had their music copied by AI, and their fans have preferred the AI. It has the potential to replace all of us, and all our jobs. I've got a lack of trust in it completely."

UK, 18-34, Low/Medium Familiarity



Video

The use of Gen AI in mainstream video is not widespread. To date, its use has been more experimental as individuals and organisations trial using it in different ways – from creating short-form video to augmenting images on a smartphone. Among those we spoke to, the idea of using Gen AI in video content is slightly more contentious than in audio, but again this was very dependent on how it was being used and the context it was used in.

Many can already see the value of Gen AI for entertainment, especially as a tool on social media to play with filters and augmented reality or create personalised content like their own

avatars and characters. They can also appreciate cost-savings and convenience for small businesses and individuals who can use Gen AI tools to pull together small-scale marketing campaigns or personal projects. But this is an emotive issue for many and our findings indicate that – whether consciously or not – participants value the people they see in film, TV, news, and social media, attracted by a sense of aspiration, relatability, and authenticity. Participants do not imagine AI-generated media will, or should, ever be able to truly replace this.

Audiences need reassurances that **human skill and creativity will be respected to feel comfortable**

Lower stakes

Creating your own **character or avatars** using Gen AI

Personalised trailers

Personalised videos featuring characters from hero content – **but others feel undermines human creativity**

Screenwriters using Gen AI as inspiration for scripts – **but need disclosure to be sure they haven't 'cheated'**

Using Gen AI for backroom editing and CGI, especially if there's cost reduction for audiences – **but concern over loss of jobs and artistry**

Using Gen AI to speed up animation process – **but only for non-hero content where audiences care less about quality**

Higher stakes

Entire scripts and video being created by Gen AI from scratch

'Lifelike', realistic Gen AI **actors and newscasters** that trigger uncanny valley

Video being **touched up** (e.g. filters on actresses) without disclosing to audiences

Low stakes use case heighten entertainment through personalisation or provide convenience and cost-savings, especially for social media content or backroom functions

Red Line: High stakes use cases seen to undermine human connection and trigger uncanny valley; special resistance to hero content being routinely made with Gen AI

Video - Lower Stakes

Similarly to personalised radio stations/playlists, participants tended to feel comfortable with the use of Gen AI to create personalised video trailers or summary clips. Many liked the idea of more sophisticated content recommendations, especially if it led to efficient content discovery. For many this is low risk, as it feels like an extension of pre-existing technology - much like the way AI algorithms currently recommend content on streaming platforms. One watch-out was that participants told us that trailers and summaries needed to represent the nature of the show accurately, without the audiences

feeling like they have been conned into watching something they would not have been interested in otherwise.

The value of more personalisation was also evident when we asked participants about using Gen AI to create their own characters or avatars that could then appear in their favourite video content or games. There's a perception that this already happens in other media spaces (such as gaming, or social media avatars) so for many it did not feel like too far a jump to make them feel uncomfortable.

Video - Medium Stakes

When presented with the idea of changing the appearance of existing characters using Gen AI (such as swapping one actor out for another, or altering the character's age, sex or ethnicity), participants felt less comfortable. While some believed this might help promote on-screen diversity, many had doubts. They felt this could threaten the integrity of a director or producer's choice to cast particular actors into their characters, or that it might undermine the intention behind the storylines.

When it came to more 'backroom' uses, our participants also felt conflicted. They could see the benefit of using Gen AI to make edits, and most felt ok with it being used for CGI or creating animated content for non-'hero' shows where there is less concern about quality. But they also expressed concerns that doing this would lead to job losses as skilled editors and animators may lose work to Gen AI technology. There was also a sense that in the long run, human artistry would be lost. The fear of human replacement and that

sense of unfairness made these scenarios less palatable to our participants.

Similarly to the use of Gen AI for ideation in podcasts, participants were open to the idea of creatives using Gen AI for inspiration for storylines in television programmes or films. There's an expectation that creators need to get ideas from 'somewhere' and most were comfortable with Gen AI potentially playing a role in this process. Some told us they were very comfortable with this for what they considered 'low-quality' entertainment like reality TV shows but were less comfortable when it was used for 'hero' content like dramas or films.



I do like the idea of being able to change the ethnicity of a character in a game for example, that could make it more representative."

UK, 55+, Low/Medium Familiarity

Video - High Stakes

Participants wanted the role of Gen AI in creating storylines to be limited. When presented with the idea of using Gen AI to write entire scripts for TV shows participants felt far less comfortable, feeling that it was a risk to human creativity or that was somehow 'cheating'. They were very uncomfortable with the idea of Gen AI autonomously producing and directing a TV show which many felt threatened creativity and could potentially lead to very poor-quality content. There was also far more discomfort with the use of Gen AI to create an entire long-form TV programme or film in comparison to short-form digital only content. Using it for videos on YouTube and TikTok for instance felt less risky, and participants indicated these were more natural spaces for the use of Gen AI to create entire pieces of content, as opposed to primetime broadcast TV.

In discussion about an AI-generated newscaster



It'd be a bit strange to be honest, I don't think I would like it. I wouldn't like it at all."

UK, 35-54, Low/Medium Familiarity



If it's supervised by a human, like if the script was partially created by AI, or if a human had overseen the project and tweaked the Gen AI output, then I probably wouldn't have as much of a problem with it. But as soon as it's the Gen AI doing the creating I have a problem with it."

UK, 55+, Medium/High Familiarity

The scenario our participants were least comfortable with was the use of Gen AI to create life-like actors, presenters or news casters that appeared to be human. Some indicated this would trigger what has been called the "uncanny valley" which is deep unease in response to seeing a computer-generated figure that looks human. This brings about fears of replacement, and participants told us this could make them feel tricked or hoodwinked.

In discussion about an AI-generated sports commentator



Well that would be a bit misleading [if the AI announced itself as a sport commentator and you then found out it was AI], it would imply it was a real person, it would be deception."

UK, 35-54, Low/Medium Familiarity

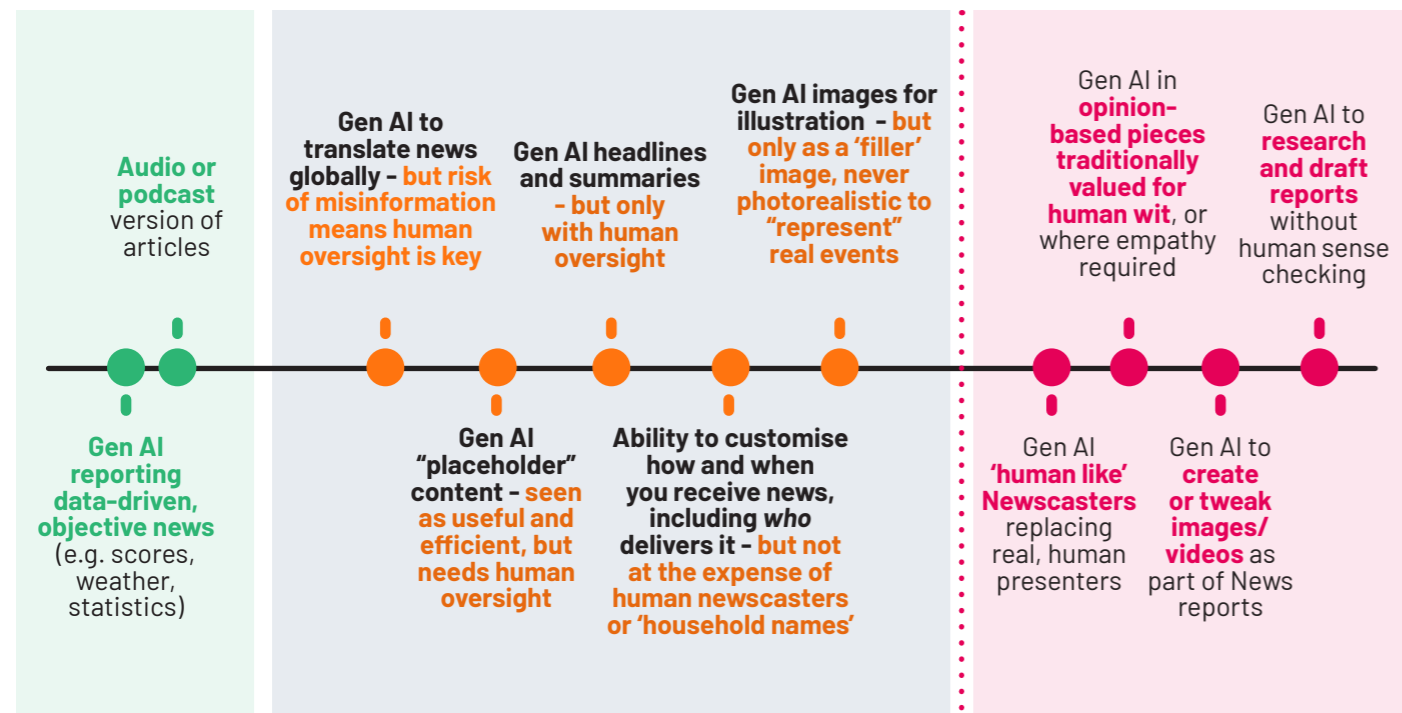
News

There is currently little consensus in the industry on how Gen AI should be used (or if it should be used at all) in newsrooms across the world. Despite headlines about the dangers of Gen AI in news, a report from the LSE found that globally, nearly three-quarters of news organisations believe Gen AI presents new opportunities for journalism.²⁴

Among our participants, however, many felt Gen AI use cases in journalism are high stakes, even more so than audio and video. Those we spoke to cited misinformation as a key concern, especially against what they identify as a backdrop of heightened partisanship and division, while many shared a belief that algorithmic news delivery (e.g. through TikTok or X [formerly Twitter]) is driving misinformation, fermenting echo chambers, and heightening partisanship.

Audiences need **reassurances against misinformation and Gen AI replacing the human element of News**

Lower stakes



Gen AI can be used to increase convenience and efficiency

Red Line: Potential for disruption feels higher for News due to the ongoing risk of misinformation, deepening of societal division, and replacing human nuance

News - Lower Stakes

That said, our participants do identify some limited, low-stakes use cases for Gen AI in the news space that they are readily comfortable with. Using AI to voiceover articles for those who are sight-impaired, or to summarise and report data-driven, objective facts like sports scores and the weather feels contained, safe, and convenient. These use-cases felt valuable, as they were believed to improve the experience of news consumers by making the content more accessible.



A credible news organisation might have a Gen AI writing the article, but surely they would still be fact-checking, like they do with any other journalist."

AUS, 55+, Medium/High Familiarity

News - Medium Stakes

This sentiment extended to the use of Gen AI to translate articles into localised dialects or new languages, which participants felt could further democratise information and give them access to new content. But they felt human oversight was needed in this process to ensure translated articles were correct and also felt it was important to get consent from the journalist or newsroom responsible for the original article.

Participants were less comfortable when presented with the idea of using Gen AI to create headlines or summaries. While they recognised this would likely bring efficiencies there was a worry that it may lead to incorrect headlines and drive misinformation. There was also a sense that it might lead to laziness in the profession if journalists became reliant on Gen AI to help them write their stories and there was agreement that any use of Gen AI in this context would need

human oversight. There was a similar reaction to the use of Gen AI for creating placeholder content that would appear on a news site when news was breaking until a journalist could update it. Participants did not want Gen AI acting autonomously, especially for breaking news stories where facts are often disputed.



I think there's a lot of potential for misinformation to go out, information that is not factual. AI doesn't necessarily get the nuances of language and conversation and sarcasm. It might generate a headline, a summary, an article that isn't necessarily the facts of what actually happened."

UK, 18-34, Low/Medium Familiarity



News - Higher Stakes

The concerns around disinformation were also evident in reactions to the use of Gen AI to create images and videos for news. There was a distinct discomfort with the use of Gen AI to recreate images of actual events with participants concerned it may misrepresent reality.

Participants also didn't want Gen AI editing news footage or images for the same reason. Many were more open to the idea of using it to create 'filler' images that could replace stock images, but even this was seen to hold more risk than just using a stock image.

Some of the most concerning scenarios to participants however was the idea of Gen AI autonomously writing and publishing news articles which was believed to hold significant risks. Many felt it was likely Gen AI news content would be inaccurate or biased at some point, with potentially devastating consequences if this led to widespread misinformation. There was also notable concern about Gen AI playing a role in opinion-based analysis where the individual journalist is valued for their expert perspective on current events. As with creatives in the audio and video space, participants highly value and respect the journalists, who they feel bring empathy, wit and creativity to their work – something they do not feel Gen AI can replicate.



I think if a robot is writing articles, well, that robots doesn't have any emotions, not human. Therefore, if they're writing about humans, you can imagine them writing "a baby cried for 2hrs before dying". Well, a journalist probably wouldn't write it like that, would they? They would be sensitive to the fact that emotions are involved."

UK, 35-54, Low/Medium Familiarity



Journalism is such a craft, and you will have your sources and you'll know how to interpret those sources. Does AI know not to take things at face value?"

UK, 35-54, Medium/High Familiarity



If it relates to very heavy, real life issues [e.g. geopolitical conflicts] there could be more bias when it comes to politics compared to if it's just statistics where it's a lot easier to tell that's what it is."

UK, 18-34, Low/Medium Familiarity

Overall, even with some potential benefits, the overriding sense for many is that the potential impact of Gen AI on society is so great that they would rather it not be used at all in the news. If media organisations decide to use it, it needs to come with strong signals that they adhere to standardised regulations, alongside transparency over usage, and how data is used and shared by Gen AI.



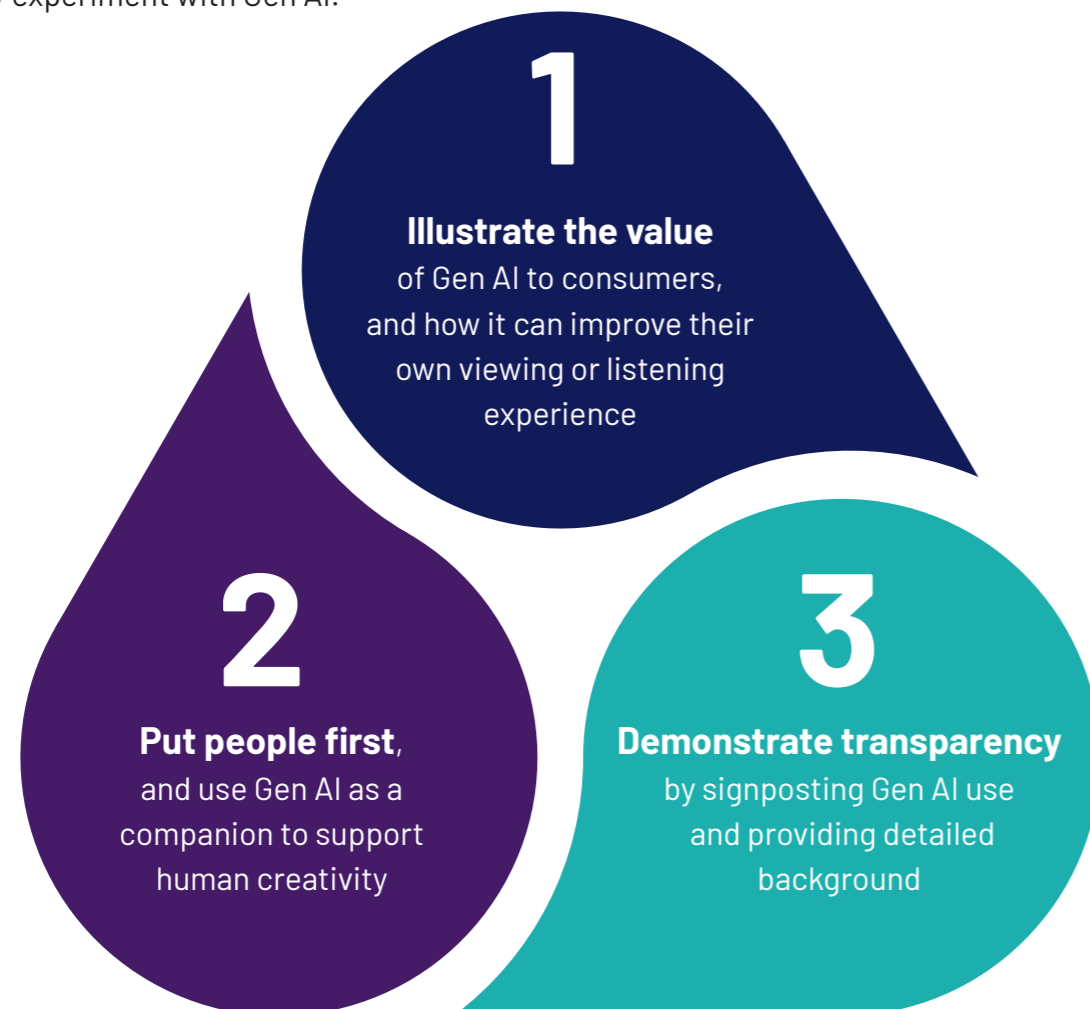
I just don't think AI should be part of the [news] media. Yes, let it do operational [things], other things, but there's so much trouble in the world...I think AI could really radicalise people and get them to do all sorts of things. It needs to be used carefully."

UK, 35-54, Low/Medium Familiarity

What audiences want from Generative AI

Media organisations want to experiment with Generative AI (Generative AI). At the same time, the technology they are experimenting with can be unpredictable, unreliable, and is developing rapidly. And, as we've found, much of the audience is anxious about what this innovation could bring.

Our research suggests that audiences understand the challenge for media organisations and they told us they want media organisations to take three actions when they experiment with Gen AI.



Illustrate Value

Audiences want to know that the use of Gen AI has value to them before they feel its use is justified. When audiences do engage with Gen AI they often report a having a 'wow' moment, where the unique value that Gen AI can provide suddenly becomes clear.

For the audiences we spoke to, the promise of Gen AI improving, augmenting, or enhancing media made them more comfortable with the use of Gen AI. For example, it could be that a programme or product could become more convenient for them – more personalised News, or instant subtitling. It could be that Gen AI creates a more entertaining experience – for example creating customised hero content or better SFX and Audio immersion which feel new and exciting for the audience.

Realising what Gen AI can do



Well actually, I think I'll change my mind - I would pay good money to have a cat read the News to me!"

UK, 35-54, Medium/High Familiarity



Personalisation



I would pay for something like that in the future if I want to have customised news just for me. If I'm French but I live in Italy, I want to know what's going on in the US. So I select all those three countries and they customise the news just for me."

USA, 34-55, Low/Medium Familiarity

Accessibility



I think you used the example of a slow reader, like if you want something read out a little slower or in a different language or, talking about accessibility issues, there's a lot of value there."

AUS, 35-55, Medium/High Familiarity

Convenience



The benefit of Gen AI is the convenience of it. It can make things more streamlined, like virtual assistants, giving me what I need to hear when I need to hear it."

USA, 35-54, Medium/High Familiarity

Entertaining



It's already hugely improved special effects in TV shows, and the quality of programmes are better than they would have had the budget to create. I think you can produce something a lot more spectacular on a much lower budget, albeit doing a lot of people out of work."

UK, 55+, Medium/High Familiarity

Put People First

We know from our research that a key concern for audiences is whether AI will begin to replace people or undermine elements of what they believe make us human. This broad concern carries over to media, where audiences want to know that there is a human in control and that Gen AI is being used to support human endeavour not replace it. Participants in our research said they want media companies to provide that reassurance.



I would want to know that a human has reviewed it actually, to know that it's had that oversight...I don't really care about who's written the content in the first place, as long as it's true."

UK, 18-34, Low/Medium Familiarity



Audiences want humans to be in control, and media to be regulated.

The participants we spoke to feel that the media industry has a responsibility to “do AI right,” with media providers being held accountable for the content created under their name. While our participants can appreciate that human creatives can have disparate views, write a bad script, or make mistakes, they are much less forgiving of AI.

Audiences say they are concerned that Gen AI could make them feel alienated from the content they’re watching. Whether it’s the perceived ‘replacement’ of actors with Gen AI copies, recreated audio, or scripts written with AI text generators, our participants told us the loss of the human skill and lack of natural empathy that accompanies AI-generated content could make them feel less invested in the content.



The regulatory aspect is key. I need to hear from a responsible institution, someone who has less bias, who can make sure that the information is valid, and who will make sure the tech continues to develop in a way that is up- to- date with law and security across all media.”

UK, 18-34, Medium/High Familiarity

Among those we spoke to, quality control and human verification were required for them to feel comfortable engaging with AI-generated media. Even if some admit they would not check every piece of media they consume for evidence it is AI-generated, they want to feel safe in the knowledge they can rely on the media industry to uphold standards of quality in entertainment and News.

It is important for audiences to know there are humans behind the scenes ready to prevent Gen AI from getting things wrong or causing harm. Our participants said they felt industry-wide regulation was key.



My uneasiness comes from what I see as a lack of regulation at the moment, Gen AI is kind of uncontrollable. This is what makes it scary because the limits are almost endless, and the longer time goes on it will only get more powerful. What is the limit of it? Who is in control?”

UK, 35-54, Low/Medium Familiarity



I think there needs to be full disclosure when using Gen AI – no security risks, no vile news images, the whole lot needs to be regulated heavily. Private institutions have shown that they’re not capable of regulating themselves, so it needs to be a governmental regulatory body.”

USA, 18-34, Medium/High Familiarity

Demonstrate Transparency

Most of the audiences we spoke to expect that Gen AI will be used in media. They believe the efficiencies it can provide are too beneficial for the media industry to ignore. At these early stages, our audiences still feel they need to know when Gen AI is being used so they can engage with it at their own pace. This allows them time to experiment, play, and familiarise themselves with AI-generated media, while the ability to be able to 'dial back' their level of engagement if Gen AI performs poorly is reassuring.

Our research suggests audiences expect Gen AI use to be signposted, and for there to be options to access more information. Participants indicated they were more likely to trust media organisations that are proactive in their approach to Gen AI and communicate regularly with audiences about their measures to ensure quality, and ensuring transparency about where, when, and why Gen AI has been used.



From a personal perspective, I want to know if a lot of what I'm watching on TV or on video has been artificially generated. I feel like it's only a matter of time before it becomes really hard to tell whether or not something is AI. And it can depend on whether I trust the person, you know, the person providing the AI."

UK, 55+, Medium/High Familiarity

Signposting the use of Gen AI

Signposting can take many forms but at the very least research participants stated they want to know when media is 'AI-assisted' and if it has been 'human-verified'. This can be via tags on songs, podcasts, and shows that flag when Gen AI has been used, similar to an 'explicit' label, or it could be part of a wider communication campaign between the media provider and consumer.

Signposting can be a strong signal of responsibility from media organisations, building trust, and minimising the audience's sense of burden to check when Gen AI is used. Those we spoke to feel that so long as they can see – and trust – that providers have done the work for them, they feel more comfortable with Gen AI media overall.

There are some use cases which we shared in the research where some of our research participants feel they don't need to know if AI is used: if Gen AI content is seen as an extension of current technology or ways of working, for

example. These low stakes uses are seen as less disruptive, especially when used in 'backroom' activities like editing, special effects, research, or inspiration.

If audiences don't realise Gen AI has been used, those we spoke to say that finding out can feel like a betrayal, and without disclosure, it feels like cheating.

Much like consumers who want handmade products, audiences want the choice to consume "the real deal". If the use of Gen AI in content is not disclosed, and audiences find out it has been used – or suspect it has – this may lower value more than if it had been disclosed at the start. What's more, audiences fear losing the ability to choose when and what media they consume, and this can make them resentful and distrustful of media organisations.



I think the way Gen AI is going is we're not going to be able to tell [what's real]... So, I like the thought that any image or any video that's got any element of Generative AI is marked so people can go: look, what I'm seeing may not be representative of the real thing. At least that's a trigger because I think it's going to be so hard to discriminate."

AUS, 18-34, Low/Medium Familiarity



Giving the audience the option to drill down further

While many of our participants trust media organisations to oversee and moderate Gen AI media for them, at these early stages it still feels important that they can judge the quality and impact of Gen AI media themselves.



It's a trust-building exercise: You have to know Gen AI is being used, see if you like it, see what you think."

UK, 55+, Low/Medium Familiarity

This is especially true of journalism, where there is real fear of misinformation. Those we spoke to shared concerns that Gen AI has the potential to mislead them and make them doubt their own eyes. In a context where audiences – particularly our audiences in the USA – say politics and society are increasingly divided, fears of bad faith actors using Gen AI to misinform is high. This means that audiences feel in control when given the option to drill down further into when, where, and how Gen AI has been used. That could include:

- **Provenance:** There's an expectation that detail of origin / source would be available so audiences can judge sources
- **Principle:** Audiences value access to a "declaration" of the provider's principles and accordance with industry regulations, for example similar to clicking an "i" symbol / via hyperlink
- **Purpose:** Information on why Gen AI was used in this instance can help with reasons to believe Gen AI is justified (e.g. to enable staff to do X, to bring you more of Y)



As long as they're disclosing it, it is OK because then you might go and fact-check it yourself. It is better than having it unsaid. Especially in journalism where, I guess, people rely on it like it's a source of truth"

AUS, 35-55, Low/Medium Familiarity



Conclusion

In a little over 18 months Generative AI (Gen AI) has raised a number of profound questions for the media industry – from whether and how media companies should use Gen AI tools, to questions of copyright and IP, and how the industry might be reshaped over the longer term by tools that radically change how content can be created across text, audio and video.

As media companies explore the opportunities and challenges of Gen AI it will be important they take into account their audiences' expectations and attitudes and this research is intended as a helpful input for media organisations as they seek to navigate the way ahead.

The research has shown that audiences believe Gen AI is a substantive new technology that is likely to have a disruptive impact on the media market. While some can see the opportunities it presents, many are nervous about how it may be used in media and want

reassurance from media companies about how they will use it. And as shown in the report, audiences are already forming views on where they are likely to be more or less comfortable with the use of Gen AI across video, audio and news.

The views of the participants in our research were thoughtful and nuanced but importantly are also likely to evolve as Gen AI develops and more audiences consume Gen AI content and make use of services powered by Gen AI.

The BBC will use the findings of the report to help shape where and how we experiment with Gen AI, alongside wider considerations of the opportunities and challenges, and also views of others, particularly creative teams and contributors. We will also launch an AI literacy initiative, and hold an AI and Media event, later this year – to help encourage understanding, discussion and debate about the impact of AI on media.



Appendix (1)

Methodology

The advent of Generative AI (Gen AI) presents a significant opportunity for the BBC, as well as BBC Studios and ABC. This study was carried out by Ipsos on behalf of the BBC, BBC Studios and ABC to explore its potential impact on journalism, audio, and video content.

As providers of impartial, high-quality, and distinctive content that informs, educates, and entertains, it is essential for the BBC to understand how to adapt and act in the public interest in light of emerging technological advancements.

Ipsos created a two-stage approach encompassing a semiotic analysis and workshop fieldwork in three markets: UK, USA, and Australia. Research objectives for the study were:

- Explore audience understanding of and engagement with Gen AI and the factors that influence this
- Understand how audiences feel about Gen AI, what they believe about Gen AI and why they hold those beliefs
- Unpick how audiences feel about different potential uses of Gen AI across video, audio and journalism



Stage 1: AI Cultural Deep Dive

To navigate this complex and multifaceted landscape, the study began with a **Cultural Deep Dive** to identify the macro forces that shape audiences' relationship with AI. Conducted from 9-27 October 2023, Ipsos used an approach based on semiotics and cultural analysis to investigate past, present and future representations of AI and how it might evolve in the future.

- **Desk Research:** a comprehensive review of Ipsos and other data on audience understanding and perceptions of Gen AI.
- **Semiotic Review of Cultural Representations:** investigating past and present representations of AI to understand underlying perceptions driving attitudes to Gen AI.

Objectives:

- Trace the evolution of cultural representations of AI in fictional content, uncovering the themes behind the depiction of AI in fictional future scenarios that might influence audiences' understanding and expectations of the factual technology.
- Run a landscape overview of research on audiences' reactions and future expectations about AI/Gen AI to establish foundational knowledge.
- Identify relevant innovations and trends to understand what the factual next-future will look like (light touch).

Stage 2: Deliberative, scenario-testing workshops

Ipsos employed a deliberative approach with audiences themselves, through extended two-hour scenario testing online²⁵ workshops to explore different Gen AI media scenarios with potential use cases to understand appetite, and future potential engagement. These workshops were conducted from 1-30 November 2023 and focused on:

- Assessing current understanding of AI and Gen AI, and pressure testing how those understandings hold (or don't) in the face of new developments/information.
- Exploration of potential media use cases to understand how comfortable or not audiences are with different applications of Gen AI.
- Scenarios ladder up in terms of complexity and role of Gen AI, allowing participants time and space to familiarise themselves with potential futures, think and change their minds.

Workshop Breakdown

- 15x 2hr deliberative workshops with 150 participants in three markets: the UK, the USA (with BBC Studios), and Australia (with the Australian Broadcasting Corporation).
 - UK: x6 workshops with n=10 participants
 - USA: x7 workshops with n=10 participants
 - AUS: x2 workshops with n=10 participants
- Pre- and post-task with participants in USA & UK (in groups 1 & 2)

Sample Specification

All participants had engaged with core areas of interest, including content (e.g. news, weather, sport, education) and media types (e.g. broadcast/VOD, radio, sounds). Participants were assigned to workshops to ensure:

- An even mix of genders
- A mix of ethnicities
- A mix of socio-economic backgrounds and household incomes

Workshops were also structured to corroborate participants would speak for:

- A spectrum of digital familiarity (with separate workshops for those with high/medium and low/medium familiarity)
- Specific age groups, in conjunction with level of digital familiarity (with exception of AUS, where a mix of all age demographics took part) – the split by age bracket and level of digital familiarity in the UK, USA, and AUS were as follows:

UK						
Workshop#	1	2	3	4	5	6
Age	18-34		35-54		55+	
Digital Familiarity	Med/High	Low/Med	Med/High	Low/Med	Med/High	Low/Med
N=60	x10	x10	x10	x10	x10	x10

US							
Workshop#	1	2	3	4	5	6	7
Age	18-34		35-54		55+		18-34
Digital Familiarity	Med/High	Low/Med	Med/High	Low/Med	Med/High	Low/Med	Med/High
N=70	x10	x10	x10	x10	x10	x10	x10

AUS		
Workshop#	1	2
Age	18-55+	18-55+
Digital Familiarity	Med/High	Low/Med
N=20	x10	x10

Market and Location

Research was conducted in three markets: the UK, USA, and Australia. Fieldwork was conducted both online and in-person and participants were recruited from specific locations within each country:

	Fieldwork Location	
UK	London	Participants were recruited from the local area
	Manchester	
	Online	Participants were recruited from a nationwide sample (i.e. from Wales, Northern Ireland, England, Scotland)
US	Online	Participants were recruited from a nationwide sample
AUS	Sydney	Participants were recruited from the local area
	Brisbane	Participants were recruited from the local area

Appendix (2)

Semiotic References

References below were used to complete our semiotic analysis.

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This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide a true understanding of society, markets and people. To do this, we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder.

Ultimately, success comes down to a simple truth:
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