POLICY REPORT

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Trust as a Strategic Asset

AI and Domestic Confidence in Singapore amid US-China Dynamics

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Executive Summary

This policy report presents findings from a national online survey of adult residents in Singapore on public trust in artificial intelligence (AI). Results indicate widespread support for AI use, research and development, and regulation in the country. Notably, the participants trust Singapore-based institutions such as the national government, the local academia, and the Singapore military to oversee the use, research, and governance of AI. Meanwhile, confidence in international organisations and leading AI nations such as the United States and China remains low. These findings highlight the importance of a domestically anchored approach to AI deployment and regulation, where governance frameworks are shaped and implemented by trusted national institutions. This approach can help build public confidence, ensure ethical outcomes, and include Singapore in conversations around responsible AI innovation.

Introduction

Trust underpins the legitimacy and effectiveness of public policy. Policies built on a foundation of trust are more likely to gain public support, foster compliance, and facilitate successful adoption, especially in domains where artificial intelligence (AI) is perceived as intrusive (e.g., facial recognition or algorithmic surveillance). Understanding the dynamics of public trust allows policymakers to identify which AI applications are viewed as high-stakes or controversial, enabling them to anticipate social tensions and design appropriate safeguards. This, in turn, supports the development of targeted communication strategies that promote informed public discourse and help mitigate fear and misinformation.

Overall, countries that integrate public sentiment into their innovation frameworks are better positioned to cultivate sustainable AI ecosystems grounded in trust. In an increasingly competitive global environment, public trust becomes a strategic asset that strengthens legitimacy, attracts investment, and differentiates responsible leaders in the field of AI.

Our study examined public trust in artificial intelligence use, research and development (R&D), and regulation. We found that while there is broad support for AI adoption and governance, confidence in the institutions managing these processes diverges. Notably, respondents expressed strong trust in Singapore's domestic institutions, which was contrasted by the scepticism towards international bodies and global AI leaders. Taken together, these findings underscore the nuanced and context-dependent nature of public trust in AI in Singapore, highlighting the importance of grounding future policy and innovation strategies in both public attitudes and local context.

Data & Demographics

This report draws on a nationally representative online survey of 1,014 adult Singapore residents (aged 21 and above), conducted in May 2024 via a professional polling company. The survey was designed to closely mirror (where possible) the actual demographic profile of adults in Singapore in 2024.[1,2] Guided by an extensive literature review, we drafted a questionnaire that was later pretested by social scientists. Following data collection completion in May 2024, we downloaded the data for cleaning and checking, yielding 1,014 (out of 1,200) valid responses.

The majority of respondents were Singapore citizens (88.4%), with permanent residents (9.2%) and foreign residents (2.5%) making up the remainder. The sample had a near-even gender split (52.5% male, 47.5% female) and an ethnic composition of 73.6% Chinese, 16.3% Malay, 8.1% Indian, and 2.1% "Others." To reflect the national

[1] Department of Statistics Singapore, "Population Trends 2024", accessed 6 November 2025, https://www.singstat.gov.sg/-/media/files/publications/population/population2024.pdf.
[2] National Population and Talent Division, "Overall Population", accessed 6 November 2025, https://www.population.gov.sg/our-population/population-trends/overall-population/.

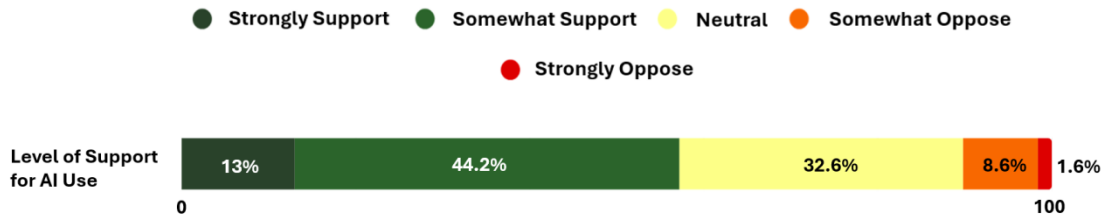
profile, weighted distribution based on ethnicity was employed. By generation, 10.6% were Generation Z (11-26 years old), 36.0% Millennials (27-42 years old), 40.6% Generation X (43-58 years old), and 12.8% Boomers (59-77 years old). The major religious affiliations in Singapore were also sufficiently represented: Buddhists (29.4%), Muslims (18.4%), Christians (17.2%), free thinkers (16.9%), Catholics (6.9%), Taoists (5.5%), Hindus (4.9%), Sikhs (0.4%), and "Others" (0.4%). A wide range of educational levels, household incomes, and current employment arrangements were also included. To capture diverse perspectives, the survey included questions on respondents' computer science or engineering backgrounds, revealing that fewer than a quarter had relevant degrees and under a third had related work experience.

Support and Confidence for AI Use

Our earlier report[3] found an "AI divide" shaped by demographics, low public awareness of AI in daily platforms, and stressed the need for education, lifelong learning, and clearer industry communication to boost AI literacy.

Given the gaps identified in the first policy report, this second iteration additionally assessed the extent to which the public supports the use of AI. Survey results show that 13% "strongly supported" and 44.2% "somewhat supported" AI use, while only 8.6% "somewhat opposed" and 1.6% "strongly opposed" it (see Figure 1).

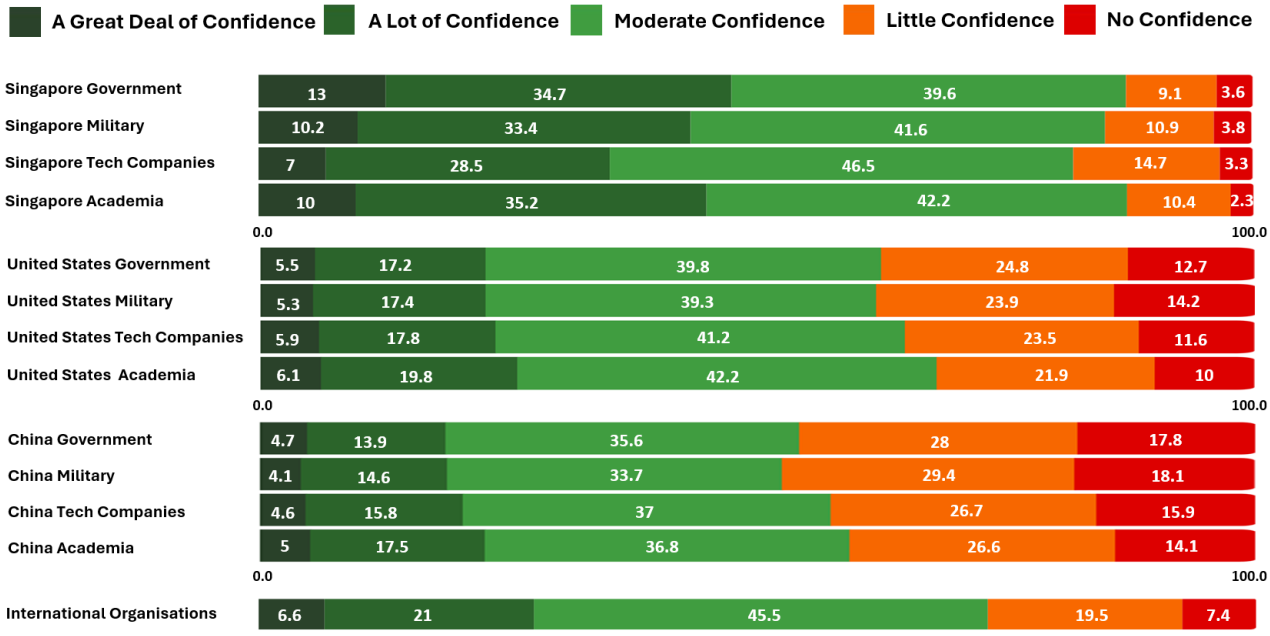
Figure 1: Level of Support for AI Use



Support for AI was highest among frequent users, those with higher education, and males. Trust levels in AI use were also measured across a range of institutions.[4] Singapore's government, military, and academia were rated more positively, especially by frequent users, while institutions in the US and China drew mixed or lower confidence (see Figure 2).

[3] Karryl K. S. Trajano, Seet Kai Seth, Ysa Marie Cayabyab, and Edson Tandoc Jr. (2025), "Navigating Public Opinion on AI in Singapore: Awareness, Perceptions, and Vulnerabilities". RSIS, Nanyang Technological University, https://rsis.edu.sg/rsis-publication/fit/navigating-public-opinion-on-ai-in-singapore-awareness-perceptions-and-vulnerabilities/.
[4] OECD, OECD Guidelines on Measuring Trust (Paris: OECD Publishing, 2017), https://doi.org/10.1787/9789264278219-en.

Figure 2: Level of Confidence for AI Use Across Institutions



Singapore Institutions

- **Singapore Government:** Confidence was strong with 47.7% of the respondents expressing "a lot" or "a great deal" of trust, while only 12.7% reported "little confidence" or "no confidence."
- **Singapore Military:** Similarly, 43.6% expressed high confidence, compared to just 14.7% expressing low confidence.
- **Singapore Tech Companies:** Among Singapore-based institutions, trust was lowest for tech companies, with 35.5% expressing high confidence and 18% low confidence.
- **Singapore Academia:** Confidence remained high at 45.2%, with only 12.7% expressing low confidence.

US Institutions

- **US Government:** Confidence was low with only 22.7% expressing "a lot" or "a great deal" of trust, whereas 37.5% reported "little confidence" or "no confidence."
- **US Military**: High confidence stood at only 22.7%, while 38.1% expressed low confidence.
- **US Tech Companies**: Strong trust was reported by 23.7% of the respondents, compared to the 35.1% who indicated low confidence.
- **US Academia:** Confidence was slightly higher at 25.9%, with 31.9% expressing "little" or "no confidence."

Chinese Institutions

- **Chinese Government**: The government faced notable scepticism, with only 18.6% of respondents expressing "a lot" or "a great deal" of trust, while 45.8% reported "little" or "no confidence."
- **Chinese Military**: Trust in the military was similar, with 18.7% expressing high confidence and 47.5% reporting low confidence.
- **Chinese Tech Companies**: Confidence was slightly higher at 20.4%, though 42.6% of the respondents reported low confidence.

- **Chinese Academia**: Trust in academia stood at 22.5%, with comparatively lower scepticism at 40.7% expressing “little” or “no confidence.”

International Organisations

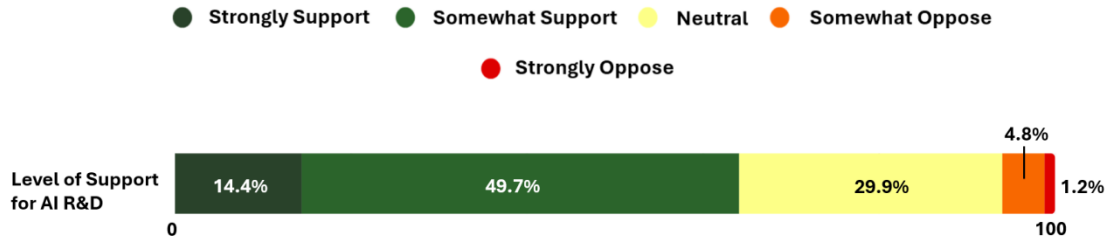
- Confidence in international organisations was relatively balanced, with 21% of respondents expressing “a lot” or “a great deal” of confidence, while, 26.9% reported “no confidence” or “little confidence.”

Overall, AI familiarity and usage strongly shaped trust, with frequent and knowledgeable users showing greater confidence in institutions’ AI applications. This underscores the pivotal role of AI engagement in shaping public perceptions.

Support and Confidence for AI R&D

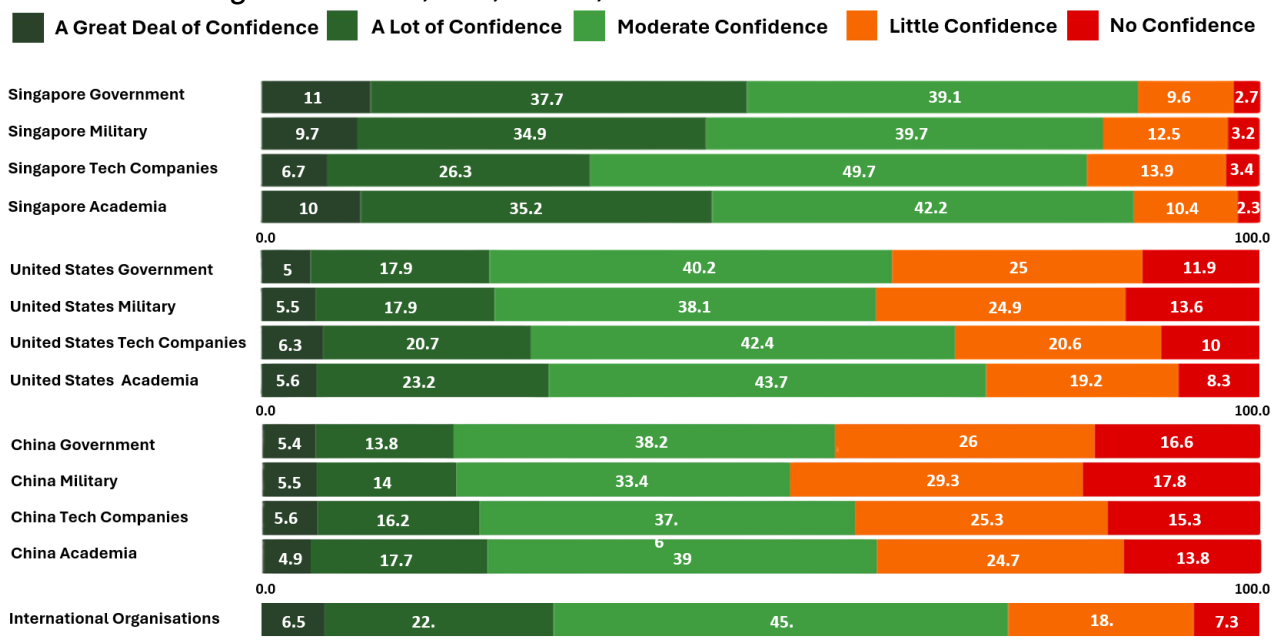
Amid sustained and rising investment in AI-related R&D, the survey also asked respondents how much they support or oppose it. The majority expressed support for R&D on AI, with 49.7% indicating that they "somewhat support" and 14.4% "strongly support" it, while only 4.8% “somewhat opposed” and 1.2% “strongly opposed” it (see Figure 3.)

Figure 3: Level of Support for AI R&D



Support for AI R&D was strongest among frequent users, the highly educated, higher-income groups, and those familiar with AI, whereas older respondents showed less confidence. Singaporean institutions, especially the government, military, and academia were again trusted far more than their US and Chinese counterparts to conduct AI R&D (see Figure 4).

Figure 4: Level of Confidence for AI R&D Across Institutions



Singapore Institutions

- **Singapore Government**: Trust was strongest for the government, with 48.7% expressing high confidence and only 12.3% reporting low confidence. AI usage, familiarity, and household income positively influenced trust.
- **Singapore Military**: Similarly, confidence was high at 44.6%, as opposed to just 15.7% indicating low confidence. Familiarity with AI emerged as the strongest predictor of trust, followed by higher household incomes.
- **Singapore Tech Companies**: Tech companies drew more moderate trust, with 33% expressing confidence and 17.3% reporting scepticism. Familiarity and frequent AI use drove confidence, but older respondents were less trusting.
- **Singapore Academia**: Academia garnered favourable views, with 45.2% of the respondents reporting high confidence and only 12.7% indicating low confidence. Frequent and familiar AI users consistently expressed stronger trust.

US Institutions

- **US Government**: High confidence was limited at 22.9%, compared to the 36.9% who expressed low confidence. Familiarity and regular AI use boosted trust, but scepticism persisted overall.
- **US Military**: Similar patterns were observed, with only 23.4% reporting high confidence and 38.5% indicating low confidence. Higher income and familiarity were linked to higher confidence levels.
- **US Tech Companies**: Tech companies garnered moderate trust, with 27% of the respondents expressing high confidence and 30.6% low confidence. Confidence was stronger among frequent AI users, while older respondents and those less familiar with AI were more doubtful.
- **US Academia**: Academia attracted the highest trust among US institutions, with 28.8% reporting high confidence and 27.5% expressing low confidence. AI familiarity and usage frequency significantly bolstered confidence.

Chinese Institutions

- **Chinese Government**: Trust in the government was low, with only 19.2% indicating high confidence while 42.6% reported low confidence. Although higher income and AI familiarity correlated with higher confidence, scepticism dominated the responses.
- **Chinese Military**: Confidence was similarly low, with only 19.5% of the respondents expressing high confidence as compared to the 47.1% with low confidence – the highest level of scepticism across all institutions and locations. Confidence was boosted by familiarity and income, but higher education levels correlated with greater distrust.
- **Chinese Tech Companies**: Tech companies garnered limited trust with only 21.8% indicating high confidence, in contrast to the 40.6% with low confidence. Frequent users and those familiar with AI had more confidence, while older respondents were more sceptical.
- **Chinese Academia**: Academia fared slightly better than other Chinese entities, with 22.6% reporting high confidence and 38.5% expressing low confidence. Confidence was highest among familiar and frequent AI users, but higher education levels and age correlated with lower confidence.

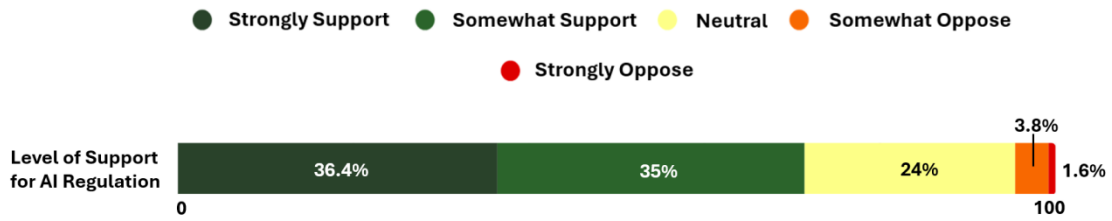
International Organisations

- As with AI use, confidence in international organisations' R&D was relatively balanced, with 29.2% reporting high confidence and 25.7% indicating low confidence. Those with higher income and were more familiar with AI had stronger trust, whereas older respondents were less confident.

Support and Confidence for AI Regulation

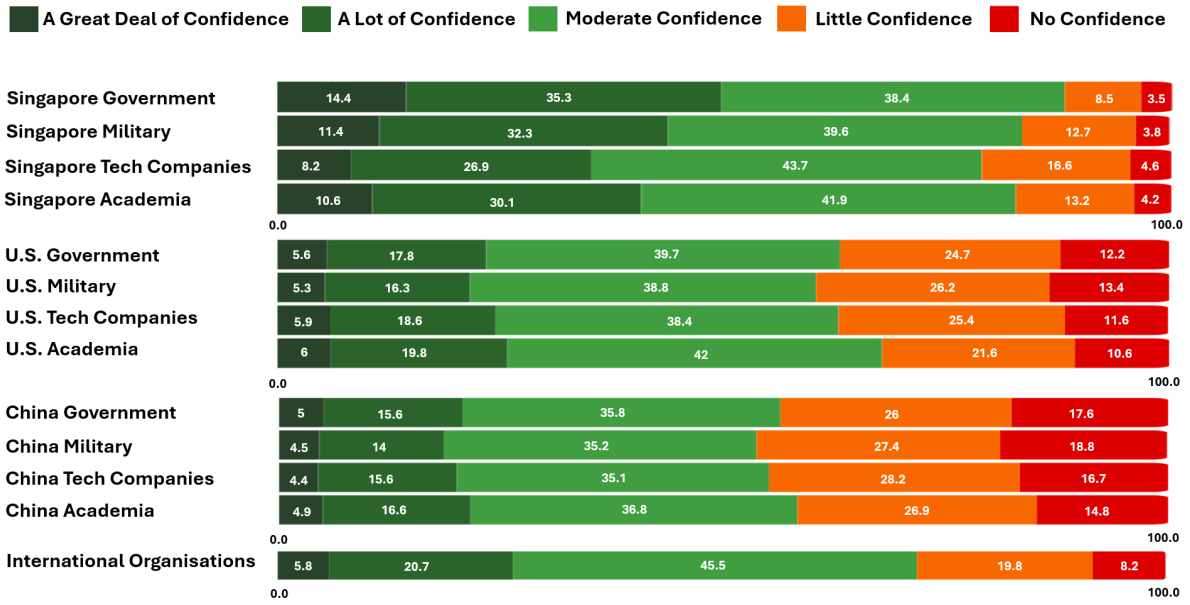
Support for AI regulation was strong, with most respondents favouring government oversight to ensure AI is used responsibly: 36.4% expressed "strong support" and 35% indicated they "somewhat support" regulation of AI. Neutral responses accounted for 24% (see Figure 5).

Figure 5: Level of Support for AI regulation



The survey found higher confidence in Singapore's government and military to regulate AI compared to US and Chinese institutions (see Figure 6). Familiarity with AI, frequency of its use, income levels, and education levels significantly shape public attitudes toward AI regulation.

Figure 6: Level of Confidence for AI Regulation Across Institutions



Singapore Institutions

- **Singapore Government**: Confidence in the government's ability to regulate AI was the highest at 49.7%, while scepticism was low at just 12%. Trust was strongest among higher-income households, frequent AI users, and those familiar with AI.
- **Singapore Military:** Similarly, 43.7% of the respondents expressed high confidence compared to the 16.5% with low confidence. Higher income, familiarity with AI, usage frequency, and education levels all positively correlated with trust.
- **Singapore Tech Companies**: Confidence was more moderate at 35.1%, however distrust was the highest among other Singapore-based institutions at 21.2%. Familiarity and frequent use drove trust, but older and more educated respondents were more sceptical.
- **Singapore Academia**: High confidence stood at 40.7%, while 17.4% reported low confidence. Familiarity and income were significant predictors of trust, while higher education levels correlated with lower confidence.

US Institutions

- **US Government**: Confidence in the US government's ability to regulate AI was relatively low at 23.4%, while 36.9% reported little or no confidence. Trust was strongest among those who are familiar with and are regular users of AI.
- **US Military**: Trust was similarly low, with just 21.6% of the respondents expressing high confidence compared to the 39.6% who indicated low confidence. Familiarity with AI and usage frequency correlated with trust.
- **US Tech Companies**: Public trust stood at 24.5%, while scepticism was higher with 37% expressing low confidence. Frequent users and those familiar with AI had more confidence in tech companies.
- **US Academia**: In contrast, academia garnered the highest trust among other US institutions at 25.8%, and distrust was similarly at the lowest at 32.3%. Familiarity and frequency of use were significant predictors of trust.

China Institutions

- **Chinese Government**: Confidence was low at 20.6%, while scepticism was considerably high at 43.6%. Familiarity and usage frequency boosted trust, but scepticism remained dominant.
- **Chinese Military**: Trust was the lowest across institutions and locations, with just 18.5% of the respondents indicating high confidence and 46.2% expressing low confidence. Education levels inversely correlated with confidence, while familiarity with AI improved trust.
- **Chinese Tech Companies**: High confidence was also limited at 20%, compared to the 44.9% who expressed low confidence. Familiarity and frequent use strengthened trust, while higher education levels were linked to lower confidence.
- **Chinese Academia**: Trust was slightly higher compared to other Chinese institutions, with 21.5% reporting high confidence and 41.7% expressing low confidence. Confidence was positively influenced by AI familiarity and usage frequency.

International Organisations

- Trust in international organisations' regulation of AI was fairly balanced, with 26.5% of respondents reporting high confidence and 28% indicating low confidence. Familiarity with AI, usage frequency, and higher income predicted trust.

Overall, public support for AI regulation was evident, with local institutions inspiring the highest levels of confidence. Familiarity with AI and regular usage strongly influenced public confidence, highlighting the role of AI literacy and awareness in fostering trust in AI governance.

Discussion

Our study found broad public support for AI, but confidence in its governance varies. Singapore's institutions are generally trusted, while international actors, particularly the US and China, are viewed more sceptically. This pattern holds across AI use, R&D, and regulation, with domestic institutions consistently seen as more trustworthy.

Familiarity and frequency of AI use emerged as the strongest predictors of support, suggesting that awareness and engagement foster greater confidence. Education, income, gender, and age also played important roles in shaping attitudes. Those with higher levels of education and income generally expressed greater enthusiasm, while male and younger respondents also tend to be more supportive. However, it should be noted that with certain institutions and countries, higher levels of education reduced trust. These findings suggest that while familiarity and use are influential, they are not the only determinants of public support. Trust in AI is a complex and context-dependent phenomenon, shaped not only by individual characteristics but also by institutional credibility, cultural attitudes, and geopolitical considerations.

Confidence in institutions showed sharp contrasts. The Singapore government, military, and academia received strong trust, while local tech companies attracted moderate confidence but still higher than foreign entities. In contrast, US and Chinese governments, militaries, and tech firms drew mixed or low trust, though international organisations fared slightly better.

These findings suggest that trust in domestic governance structures and accountability mechanisms provides an important foundation for AI acceptance in Singapore. The distribution also reflects both geopolitical dynamics and the salience of national context in shaping public trust. While Singapore's institutions benefit from strong domestic support, international players are perceived with greater caution.

This support extended to AI R&D and regulation, with over 70% backing governance. Yet, trust in regulatory capacity followed the same divide: strong confidence in Singaporean institutions, limited trust abroad, and greater scepticism among the more educated. These patterns highlight that public trust is context dependent, rooted in institutional reputation, demographics, and national legitimacy.

Although local confidence alone does not determine global leadership status, domestic trust can serve as a strategic enabler for responsible innovation and credible participation in global AI governance forums. For example, according to the Center for AI and Digital Policy (CAIDP) AI & Democratic Values (AIDV) Index – which assesses how national AI policies align with international democratic values – Singapore performs strongly on several AI governance dimensions, such as institutional trust and readiness. However, it does not comply to all twelve of the AIDV metrics, particularly those focused on robust mechanisms that require commitment to transparency, accountability, and ethical standards in AI regulation.[5] Despite these gaps, the high level of public trust in Singapore's institutions may reflect a form of performance legitimacy, whereby citizens and residents place confidence in the system's effectiveness and outcomes rather than its full alignment with international best-practice procedural standards. This could set the stage for emerging local and regional LLMs (large language models), such as Singapore's SEA-LION (Southeast Asian Languages in One Network).[6]

It is also worth noting that Singapore currently ranks third globally in the Global AI Index (2025), behind the US and China, based on metrics including investment, research, infrastructure, and policy readiness. This suggests that while Singapore has made significant strides in institutional preparedness and ethical AI governance, it remains a fast follower rather than a first mover in AI innovation. Our findings, thus, support the argument that Singapore's comparative advantage lies not in scale or technological dominance, but in trust-based governance and regulatory stewardship.
Taken as a whole, these results contribute to the complex picture of public trust in AI in Singapore. On the one hand, there is broad support for AI use, research, and regulation, underpinned by strong trust in domestic institutions. On the other, confidence in international actors is limited, reflecting concerns about accountability, competing interests, and potential misuse.

[5] Center for AI and Digital Policy (CAIDP), "Artificial Intelligence and Democratic Values: CAIDP Index 2025", accessed 11 November 2025, https://www.caidp.org/reports/caidp-index-2025/.
[6] SEA-LION (Southeast Asian Languages in One Network), https://sea-lion.ai/.

Limitations to the Study

We recognise several limitations to this study. First, the survey was conducted in 2024, and since then, there have been not only rapid developments in AI where both the technology and public trust are highly volatile, but also significant geopolitical shifts that may influence perceptions of AI governance. In particular, global political changes, including the transition in US leadership in early 2025, evolving rhetoric on data privacy, and the reconfiguration of technology alliances, may have affected respondents' views towards foreign AI institutions. These changes are especially salient for smaller states such as Singapore, which tend to value stability and multilateral cooperation in navigating global power dynamics.

At the same time, domestic policy developments and the emergence of new regional frameworks, such as ASEAN's AI governance principles, may recalibrate public perceptions of what constitutes "responsible AI." For instance, recent local reports – such as those from The Business Times[7] – highlight growing caution in the private sector. This includes breaches of AI policy becoming potential grounds for dismissal in some Singapore law firms, and the growing prominence of AI-powered scams, a key topic during the 2025 Singapore International Cyber Week.[8] This new level of vigilance, while reflecting accountability, may also deter individuals from using AI tools altogether. Given that our findings indicate awareness and use as key determinants of trust, such policy shifts could indirectly reshape public confidence in AI and the institutions that use, develop, and regulate it.

We also acknowledge the methodological constraints inherent in a quantitative survey, which, while nationally representative, captures only one dimension of how Singaporeans navigate trust in AI. To complement these findings, future research could adopt qualitative approaches, such as focus group discussions with the public and interviews with domain experts, to explore more nuanced perspectives, including possible domestic unease surrounding AI adoption and governance.

Furthermore, a substantial proportion of respondents selected "neutral" across several survey items. This neutrality may reflect indifference, uncertainty due to limited familiarity with AI, or cautious optimism amid fast-changing technological landscapes. It could also indicate a segment of the public that is observant yet undecided, underscoring the need for sustained public education, transparent communication, and inclusive participation in AI policymaking. As these remain hypotheses, future research should further investigate the underlying reasons for such neutrality. Tracking how this segment evolves over time may serve as an early indicator of trust volatility as AI becomes increasingly embedded in everyday life.

Finally, a follow-up study is planned for 2026 to assess how these global and domestic developments, both in technology and governance, affect Singaporeans' trust

[7] Tessa Oh, "Breaches of AI policy could be a sackable offence at some Singapore law firms", *The Business Times*, 21 October 2025, https://www.businesstimes.com.sg/singapore/breaches-ai-policy-could-be-sackable-offence-some-singapore-law-firms.

[8] Singapore International Cyber Week 2025 – Speech by Mr Goh Pei Ming, Minister of State, Ministry of Home Affairs and Ministry of Social and Family Development, accessed 6 November 2025, https://www.mha.gov.sg/mediaroom/speeches/singapore-international-cyber-week-2025.

in international actors, particularly the US and China. Such longitudinal analysis would enable a more dynamic understanding of how trust in AI and its institutions adapts to an ever-shifting geopolitical and policy environment.

Policy Recommendations

Our study provides valuable insights into public trust in AI in Singapore, showing broad support for adoption but nuanced views on trust and oversight. These findings offer a strong foundation for evidence-based policies that foster responsible AI use, strengthen institutional trust, and promote inclusive engagement. For policymakers, the implications are twofold: building trust in domestic institutions as a strategic asset and bridging gaps in familiarity to improve AI literacy across all demographic groups. Addressing these divides will be critical to sustaining public confidence as AI becomes more deeply embedded in Singapore's Smart Nation vision and in global digital governance.

Demographic differences suggest how exposure shapes perception. Frequent users, younger respondents, and those with higher education or income levels were more supportive of AI use and R&D, while older individuals, women, and those with less AI exposure were more cautious. Targeted AI literacy initiatives that engage diverse populations, including educational workshops, online resources, and community outreach initiatives, can build awareness of AI's benefits, risks, and ethics. Policymakers should also address inequalities in access, potentially through subsidised AI-based services, training, and initiatives that encourage diverse participation in AI development and decision-making. By addressing these divides, Singapore can foster a more inclusive AI ecosystem and mitigate the risk of social fragmentation due to disparities in technological literacy and trust.

Public confidence was strongest in Singapore's institutions: government, military, academia, and local tech companies. This trust provides a unique opportunity to strengthen Singapore's position as a global leader in responsible AI governance. Local policymakers should maintain and leverage this high trust and confidence by prioritising transparency and accountability in AI decision-making processes, including clear disclosure of AI deployment practices, ethical guidelines, and risk mitigation strategies. Likewise, regular public reporting on AI initiatives and outcomes can reinforce trust and demonstrate Singapore's commitment to responsible innovation.

However, while these findings paint a positive picture of Singapore's institutional credibility, they should not be interpreted as evidence of international recognition. Rather, they underscore that domestic trust, while significant, cannot be sufficient on its own. In this regard, while these findings reflect local perceptions, the high level of domestic institutional trust serves as a potential for Singapore to be part of the conversation on responsible AI governance frameworks internationally. But, to meaningfully participate and contribute to such conversations, Singapore must complement domestic legitimacy with external confidence-building, that is, through transparency, multilateral collaboration, and demonstrable adherence to international AI ethics standards (e.g., OECD, UNESCO, and GPAI frameworks).

Given strong public support for R&D by trusted local institutions, Singapore should keep investing in AI while reinforcing ethics and governance. Funding should prioritise socially relevant, transparent research with independent review, and collaborations across academia, government, and industry can further build confidence. Likewise, to move beyond being merely a fast follower, Singapore's emphasis on governance excellence must be complemented by deeper investment in homegrown AI capabilities. This highlights the need for stronger local and regional R&D ecosystems, open-data collaborations, and innovation incentives that reflect not only Singapore's but Southeast Asia's linguistic, social, and ethical diversity. Developing context-specific technological depth can further strengthen Singapore's regulatory and technological credibility, consolidate its regional leadership, and potentially position it closer to other leading AI nations.

Widespread public support for regulatory oversight also highlights expectations for effective AI governance. With high confidence in domestic regulators but lower trust internationally, policymakers should build transparent, accountable, and adaptable frameworks that engage stakeholders, while positioning Singapore as a model for trustworthy AI governance. The strong confidence Singaporeans have in the local government and institutions also suggests that they bear the responsibility of leading and regulating AI development, instead of relying on AI governance frameworks developed by foreign institutions.

Scepticism toward foreign institutions, especially from the US and China, suggests cautious views of international AI collaboration. Singapore can use its domestic credibility to engage international partners selectively, promote ethical standards, and act as a trusted intermediary to strengthen national, regional, or even broader international AI governance.

Overall, trust, transparency, and inclusivity are crucial to shaping public attitudes. Policies that enhance governance, equitable access, and engagement will help Singapore build an ethical, responsible, and trustworthy AI ecosystem, both locally and potentially on a global scale.

Note: The survey was conducted in compliance with the Nanyang Technological University's (NTU) Institutional Review Board (IRB; reference number: IRB-2023-796) guidelines.

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